



Scheduling Reports in SiteAudit

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Any report created in Netaphor SiteAudit™ can be scheduled for periodic archival and delivery to email recipients. Once a report is scheduled, no human intervention is required to create your monthly billing reports, weekly toner replacement reports, daily critical incident reports, etc.

Feature Overview

Netaphor SiteAudit™ contains eleven standard views and 4 diagnostic views from which users can create virtually unlimited number of custom reports that contain precisely the data desired in a desired format. Once a view is configured as desired, it can be saved and scheduled for email delivery to recipients and/or archived to the file system using the Microsoft Windows® Task Scheduler. Each time the task executes, the report is generated dynamically. This ensures the report contains the most recent data collected from the printer fleet.

Things to Do Before Scheduling a Report

Scheduling reports in Netaphor SiteAudit™ is a simple process; however, the following procedure identifies the steps that should be completed prior to scheduling the report.

1. Choose the view that contains the data you want included in the report
2. Customize the view to display the desired data
3. Customize the report layout, header, footer, color, etc.
4. Configure the scheduled delivery options
5. Save the report - *All view customizations, layout and scheduled delivery options, are stored in the report*
6. Ensure the SMTP server is configured if email delivery is desired

Once the above has been completed, use the Windows Task Scheduler to schedule how often and when the report is to be generated.

To learn more about customizing views, refer to the KB article, Customizing Views at <http://www.netaphor.com/products/support/documentation/kb/CustomizingViews.pdf>

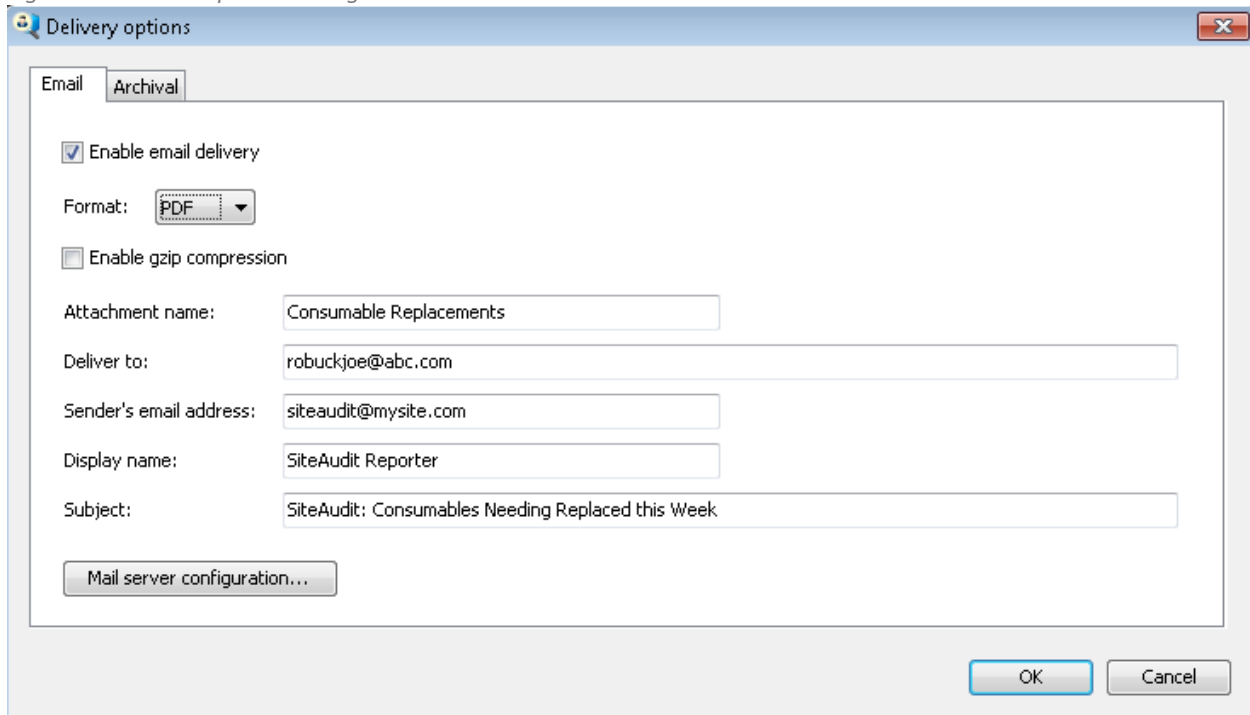
Note: The machine on which the scheduled report tasks reside MUST remain powered on, logged in, have access to the SMTP server.

Scheduling Delivery Options

A task can be created to generate any SiteAudit report and archive it or send it to email recipients. In order for this to succeed, the report must contain the delivery options.

The scheduled report delivery options are configured in the *Delivery Options*. This dialog can be opened by clicking the **Reports > Schedule Delivery** menu item.

Figure 1 – Deliver Options Dialog



The screenshot shows a dialog box titled "Delivery options" with two tabs: "Email" and "Archival". The "Email" tab is selected. The dialog contains the following fields and options:

- Enable email delivery
- Format: PDF (dropdown menu)
- Enable gzip compression
- Attachment name: Consumable Replacements
- Deliver to: robuckjoe@abc.com
- Sender's email address: siteaudit@mysite.com
- Display name: SiteAudit Reporter
- Subject: SiteAudit: Consumables Needing Replaced this Week
- Mail server configuration... (button)
- OK (button)
- Cancel (button)

The *Delivery Options* dialog contains a tab for configuring email options and one for configuring the desired archival options. The following sections explain how to configure these options.

Scheduling Email Delivery Options

SiteAudit reports are emailed to specified recipients whenever the Windows Task Scheduler task is executed. Reports are included as attachments to the email. This section describes how to configure the email options.

To enable email delivery of a report, check the *Enable email delivery* checkbox and configure the rest of the email options. Each field in this dialog is explained in detail below

Figure 2 – Email Delivery Options

The screenshot shows a dialog box titled "Delivery options" with two tabs: "Email" and "Archival". The "Email" tab is selected. The dialog contains the following elements:

- Enable email delivery
- Format: PDF (dropdown menu)
- Enable gzip compression
- Attachment name: Consumable Replacements
- Deliver to: robuckjoe@abc.com
- Sender's email address: siteaudit@mysite.com
- Display name: SiteAudit Reporter
- Subject: SiteAudit: Consumables Needing Replaced this Week
- Mail server configuration... (button)
- OK (button)
- Cancel (button)

See [Mail Server Configuration & Testing](#) at the end of this document

Format

Reports can be emailed in one of the following formats: PDF, XML, HTML, RTF, XLS, or CSV. If an XSL stylesheet or filter document is specified in the *File Format Options* dialog, then this option MUST be set to XML.

Enable File Compression

Many SMTP servers do not allow users to send email with sizes exceeding 5 or 10MB. SiteAudit allows reports to be compressed and attached to a report by checking the Enable gzip compression checkbox. The report file extension is **gz**.

Attachment Name

All scheduled reports are delivered as email attachments. Enter a name for the attachment in the *Attachment name* textbox. For example, suppose the attachment name is ABC and the desired report format selected was PDF. The email attachment name will be ABC.pdf. If gzip compression is enabled, the report file name would be ABC.gz. It is required to enter data in this field.

Deliver To

Enter the email recipients in the *Deliver to* textbox. Each email recipient address must be separated by a comma or semi-colon. It is required to fill out this data.

Sender's Email Address

Enter the address of the email sender. This address will appear in the FROM portion of the delivered email and must be any validly constructed email address. It is required to fill out this data.

Display Name

Enter the email sender's display name in the *Display name* textbox. For example, suppose a user enters the sender's email address as *abc.com* and enters the display name, *siteaudit*. The email will appear to have come from *siteaudit [abc.com]*.

Subject

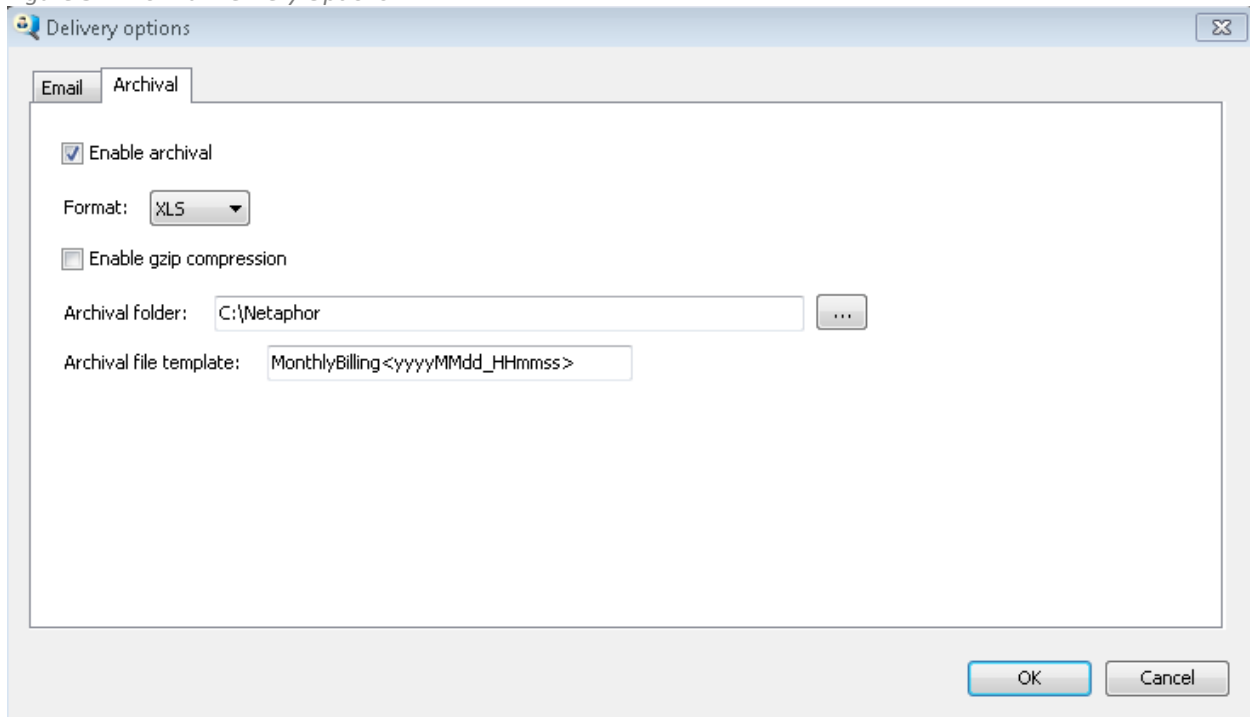
The text entered into this field is displayed in the Subject line of the email. This allows the recipient to quickly identify the content of the report. If no data is entered into this textbox, the email will contain the default subject: Netaphor SiteAudit™ usage, counts, and consumables.

Scheduling Archive Delivery Options

SiteAudit reports can be archived to a storage location periodically using the Windows Task Scheduler. When the Task Scheduler task is invoked, SiteAudit generates and archives the report as defined in the *Mail Server Configuration* dialog.

To allow reports to be archived, check the *Enable archival* checkbox. If this checkbox is not selected, reports will not be archived.

Figure 3 – Archival Delivery Options



Format

Reports can be archived in one of the following formats: PDF, XML, HTML, RTF, XLS, or CSV. Select the desired file format for the report.

Enable File Compression

Check the *Enable gzip* compression checkbox to compress the report. When this option is selected, a report is compressed when it is archived. The report file extension is gz and users must uncompress the file to view the report. Compressing a report is useful to conserve disk space.

Archival Folder

Enter or select the folder where you want your schedule reports archived. This field is required.

Archival Template

The archival template allows users to define the file name of their report and include a date/time stamp. Each time a report is generated the file name will be appended with the current date and time. Suppose a Windows Task Scheduler task has been created to archive a consumable report once a month.

The following MSDN article contains other date time formats that can be used in the template

<http://msdn.microsoft.com/en-us/library/8kb3ddd4.aspx>

Delivery Option Considerations

It is important to confirm that a report can be successfully archived or emailed. The following notes will allow one to confirm that report archival/emailing can succeed.

If a report is to be archived:

- The archival location specified in the report must exist
- The computer where the task runs must have access to the specified archival folder and permitted to write to it.

If a report is to be emailed:

- The email delivery options must be specified in the report and must be accurate
- The SMTP server must be accessible from the computer running the task
- SiteAudit must be permitted to send email via the SMTP server

Mail Server Configuration & Testing

The SMTP server must be specified in the Mail Server Configuration dialog, *Figure 4*, and SiteAudit must be able to send email through this server prior to scheduling reports for email delivery. This section explains how to confirm that SiteAudit can send email.

Figure 4 – Mail Server Configuration Dialog

Mail Server Configuration

Configure the mail server settings. The outgoing mail server (SMTP) must be specified, along with the appropriate authentication credentials, if your mail server requires authentication. The configuration can be tested by sending a test message to the specified recipient.

Outgoing mail server (SMTP): Port:

Use encryption (SSL)

Use authentication

Authentication credentials

User name:

Password:

Test mail configuration

Test message:

Deliver to:

Sender's email address:

Display name:

Specify the SMTP server, port and credentials if authentication is required. Once this information is specified, use the Test mail configuration section to confirm that SiteAudit can send email.

- Enter the email address that the test email should be sent to in the **Deliver to** textbox
- Enter any validly constructed email address for the **Sender's email address** and any **Display name**
- Click the **Send test message button** and confirm the email was delivered to the specified address. If it was not, confirm the SMTP server information entered is correct

Click the **Send test message from monitoring service** button and confirm the email is delivered to the specified recipient. *The SiteAudit monitoring service must be running for this button to appear*

Using Windows Task Scheduler to Generate Reports

This section describes how to schedule reports using the Windows Task Scheduler. Three files are required when creating a task to run a SiteAudit Hosted scheduled report.

1. The application file that is used to generate scheduled reports is located in the SiteAudit installation root folder.

"C:\Program Files\Netaphor\SiteAudit\SiteAuditScheduledReports.exe"

2. The .view file, which is the template created from a SiteAudit view. This file must contain the email recipient information and/or the archival information so that SiteAudit knows what to do with the report it generates. The .view file should be saved in a known location as the entire path and file name are needed when scheduling the task.

"C:\ProgramData\Netaphor\SiteAudit\MyReports\Inventory.view"

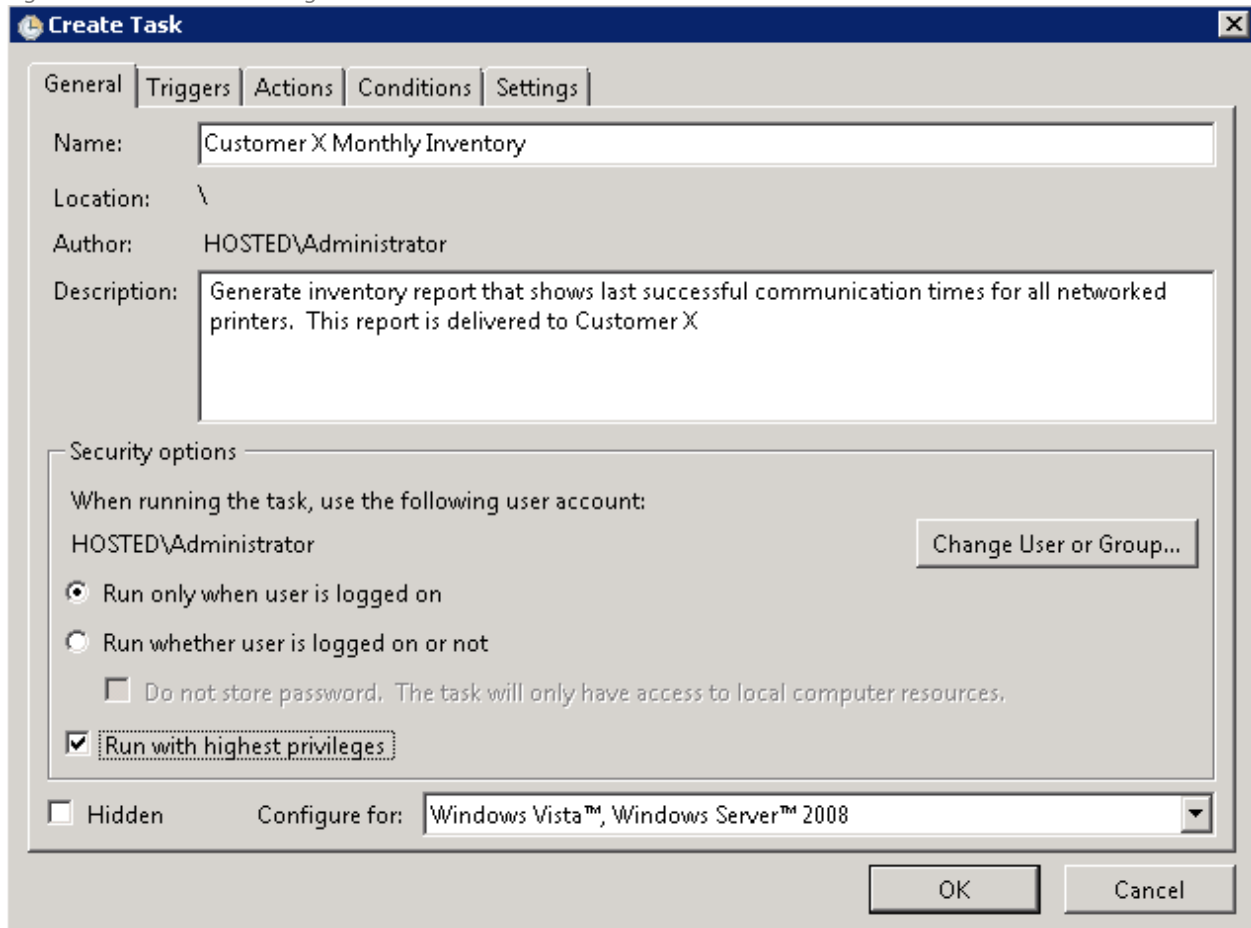
3. The keyfile that contains the information needed to access the hosted database for which the report is generated.

"C:\ProgramData\Netaphor\SiteAudit\MyReports\sampldatabase.sakey"

Note: The full path and file name is required for all files shown above. The path is not required for the view file and keyfile if both reside in the same folder as the SiteAuditScheduledReports.exe application. **Quotes are required around the path and file name if any spaces exist.**

The first step to create a scheduled report is to launch the Microsoft Windows Task Scheduler and create a new task. When a new task is created, the following dialog is shown.

Figure 5 – Create Task dialog



Enter a Name for the task. This name is shown in the main Task Scheduler menu and should easily identify what the report is or what it contains. In this example, we are creating a monthly inventory report for CustomerX.

Enter a description that helps to identify the type of report that will be generated.

Select *Run with highest privileges*.

Create a new trigger. The trigger identifies when or how frequently the report will be run. In this case, we want the report to be generated on the last day of each month.

Figure 6 – New Trigger dialog

New Trigger

Begin the task: **On a schedule**

Settings

One time

Daily

Weekly

Monthly

Start: **12/21/2011** **12:56:04 PM** Synchronize across time zones

Months: **January, February, March...**

Days: **Last**

On: **Last**

Advanced settings

Delay task for up to (random delay): **1 hour**

Repeat task every: **1 hour** for a duration of: **1 day**

Stop all running tasks at end of repetition duration

Stop task if it runs longer than: **3 days**

Expire: **12/21/2012** **12:56:08 PM** Synchronize across time zones

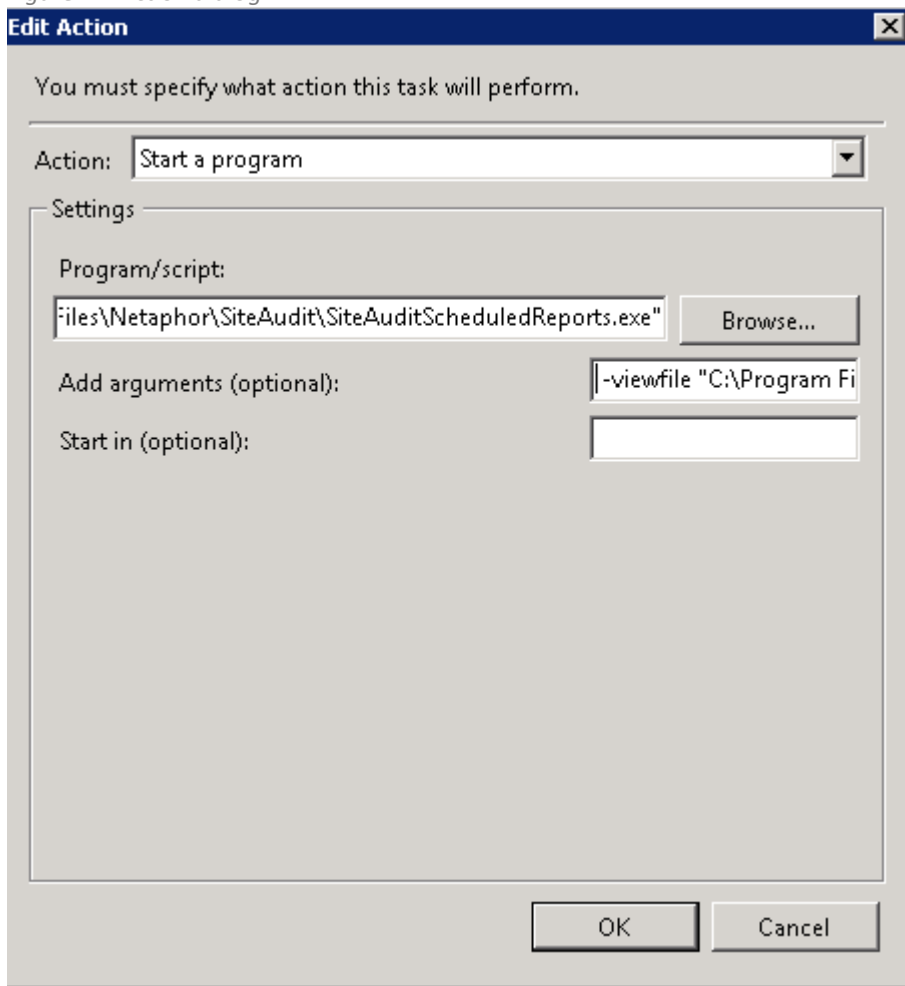
Enabled

OK **Cancel**

After defining the trigger, it is necessary to tell the Task Scheduler what task it should run. This is done by creating a new Action. This is the most important part of creating the task as this is where the view file and keyfile are specified.

In the Action dropdown, be sure that *Start a program* is selected. This should be selected by default.

Figure 7 – Action dialog



In the Program/script textbox, enter the full path and file name for the SiteAuditScheduledReports.exe, which is located in the default root folder where SiteAudit was installed. This is typically, C:\Program Files\Netaphor\SiteAudit. Remember to include quotations around the full path and filename when spaces exist.

Next, it is necessary to enter the path and file name for the .view file and the keyfile that points to the Hosted database. The –viewfile and –keyfile arguments are a required part of the command and must precede the path and filename. For example:

```
-viewfile "C:\myreports\inventory.view" –keyfile "C:\customers\keyfiles\customerX.sakey"
```

Once this is complete, the task can be saved and run to confirm that the expected report is generated and delivered to the correct recipients and/or archived to the file system.