



## Working With Reports

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- Feature Overview
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- Emailing/Exporting Reports

In SiteAudit 4.0, all reports are created from one of the fourteen SiteAudit views. The flexibility of views to filter, organize, and aggregate data allow users to build hundreds of unique views. Views can be saved and reopened in the SiteAudit viewer, published to the Reporting Web site for access over the Internet, or scheduled for delivery to email recipients or an archival location.

All Integrated and scheduled reports that existed in SiteAudit 3.x have been eliminated; however, all of these reports and more can be created using one of the existing SiteAudit 4.0 views.

Designing and scheduling reports is much easier in SiteAudit 4.0 and the same reports that can be saved or published can be scheduled for periodic archival or email delivery. SiteAudit 4.0 supports the new scheduled report file types, PDF, XLS, and RTF.

### Feature Overview

All reports in SiteAudit 4.0 are generated from a view. It is now possible to create many new types of reports as well as reproduce reports that existed in older versions of SiteAudit. Any view in SiteAudit can be customized and saved in various formats that include PDF, CSV, RTF, HTML, and XLS. These views can be immediately emailed, exported, or saved and later published to a web site or scheduled for archival or email delivery.

Since scheduled reports are created from a view like all other reports in SiteAudit 4.0, report creation is much easier than it had been in earlier versions of SiteAudit. Custom stylesheets and filter documents are no longer required to produce customized reports. It is still possible to customize reports using stylesheets, but filter documents are no longer needed. In SiteAudit 4.0, users can customize views and filter them using the existing view filtering capabilities and then style the report using the new layout functions. Once the view is customized as desired, it can be emailed, archived, exported, printed, or published to a website.

This article describes how to create reports, publish them to the Reporting Web site, and how to schedule reports for archival or email delivery. To read more information about customizing the views from which reports are derived, refer to the SiteAudit knowledgebase article, [\*Customizing Views\*](#).

## Creating a Report from a SiteAudit View

A SiteAudit report can be created from any view. The first step in creating a report is to customize the view from which the report is derived. For instance, a report can be created from the Consumables view that has been customized to show all toner cartridges that have been replaced during the past month. The view can be organized to hide or show particular columns of data, grouped to show the replaced cartridges by manufacturer and model, or configured in other ways as described in the knowledgebase article, [Customizing Views](#).

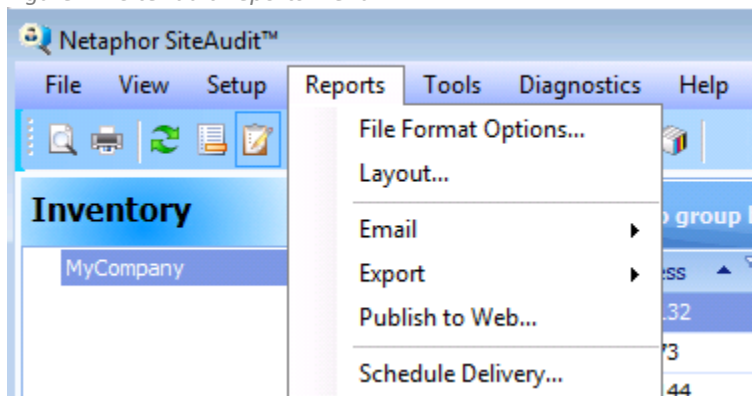
Once the view has been customized as desired, report and scheduling information can be added to the view and saved. The following sections describe to create a customized report.

## Customizing a Report

Once a view has been configured as desired, it can be saved or delivered as a report; however, it is first necessary to configure the view report options. This section describes the customization options available for reports.

The Reports menu has changed in SiteAudit 4.0 and is shown in Figure 1. This section describes how to use the *File Format Options* and the *Layout* to customize a report and the remainder of the document describes how to Email and Export a report. Refer to the SiteAudit knowledgebase articles, [Publishing Reports](#) and [Scheduling Reports](#) to learn how to publish and scheduled reports.

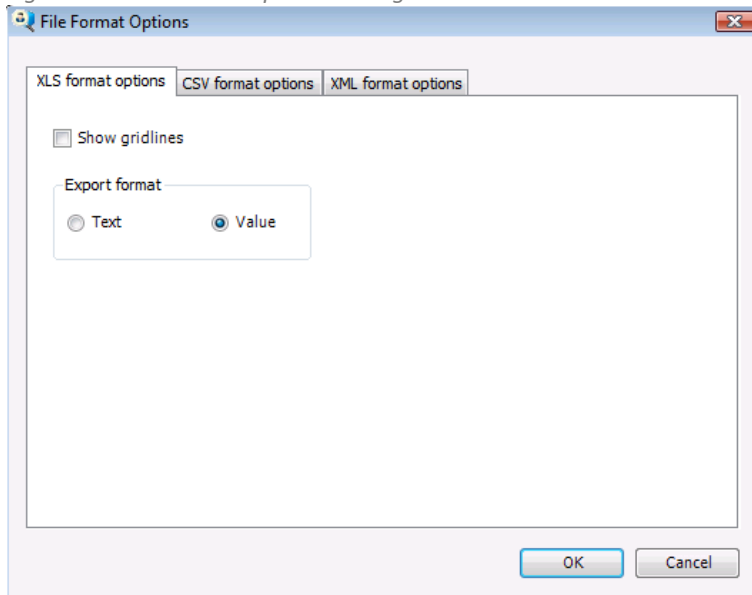
Figure 1 – SiteAudit Reports menu



## File Format Options

The File Format Options allow users to configure the options for the desired report type. Figure 2 shows an example of the File Format Options dialog. Since reports can be delivered in any file format, users may want to be sure that the default options for XLS, CSV, and XML are configured as desired. Typically, the default settings are adequate for most reports.

Figure 2 – File Format Options Dialog

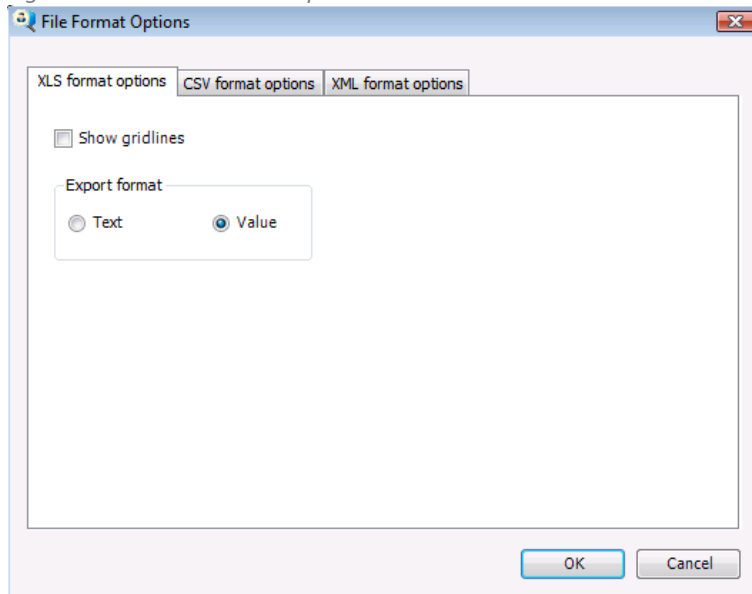


The available report formats include RTF, HTML, XLS, CSV, and XML. No format options exist for PDF, RTF and HTML reports, thus options exist only for XLS, CSV, and XML.

### ***XLS Format Options***

SiteAudit 4.0 supports the creation of reports in the Microsoft Excel format. Figure 3 shows the XLS format options.

Figure 3 – XLS File Format Options



Check the box next to *Show gridlines* to show the gridlines in the Excel report.

There are two options for the Export format, *Text* and *Value* where *Value* is the default option. When the *Value* option is selected, the cell values will use the same formatting that is used in the view. When the *Text* option is selected, all values will be treated as strings with the corresponding formatting embedded into those strings.

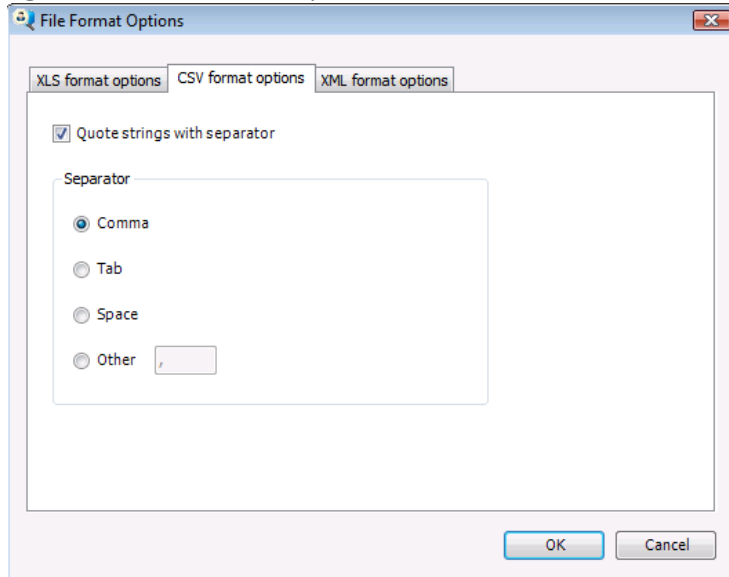
### ***CSV Format Options***

SiteAudit 4.0 supports the creation of reports in the CSV format. Figure 4 shows the available CSV format options.

By default, the *Quote strings with separator* checkbox is selected. When a Separator is found inside a value, then the value surrounded with quotes to prevent the character from behaving like a separator.

Users can choose a predefined **Separator** or choose *Other* to insert a unique separator

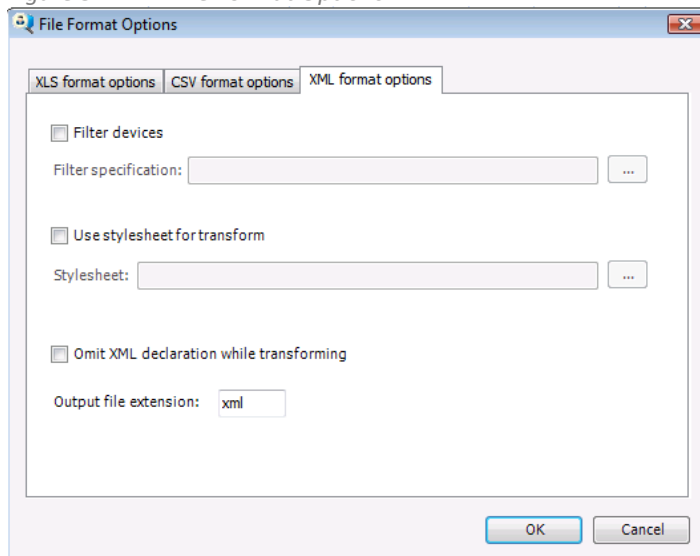
Figure 4 – CSV File Format Options



### XML Format Options

SiteAudit 4.0 supports reports in the XML format and allows for specifying an XSL stylesheet to transform and style the report. This allows users to create reports that contain their own customization and supplies backward compatibility for scheduled reports produced with versions of SiteAudit prior to 4.0. The XML format options also include a way to specify a filter document for filtering data prior to applying the stylesheet. Again, this is for backward compatibility as filtered documents are no longer needed in SiteAudit 4.0. Users can filter data in the view using the standard filter control that has always been a part of SiteAudit.

Figure 5 – XML File Format Options



## Filter Devices

For users who want to create reports using a filter document that describes what to include in the report, check the Filter devices checkbox and enter the filter document name and path in the *Filter specification*. For more information on filtering report content, refer to the SiteAudit KB article, [\*Customizing the ReportFilters Document\*](#).

## Use Stylesheet for Transformation

The *XML format options* provide a way for users to specify an XSL stylesheet to transform the XML report content into a preferred style. This option is used to create reports that are not possible using an existing view. For instance, some users may want to transform data into a format that can be input into another program or database and may require special formatting. In this case, a custom stylesheet would be appropriate. To use an XSL stylesheet to transform the XML report, select the *Use stylesheet for transformation* checkbox and enter the name and path of the stylesheet in the *Stylesheet* textbox.

## Omit XML Declaration

The *Omit XML declaration while transforming* option removes the XML declaration from the XML report and supports backward compatibility for scheduled reports created with SiteAudit versions prior to 4.0. This option is useful when the declaration is not needed in the XML report.

## Output file extension

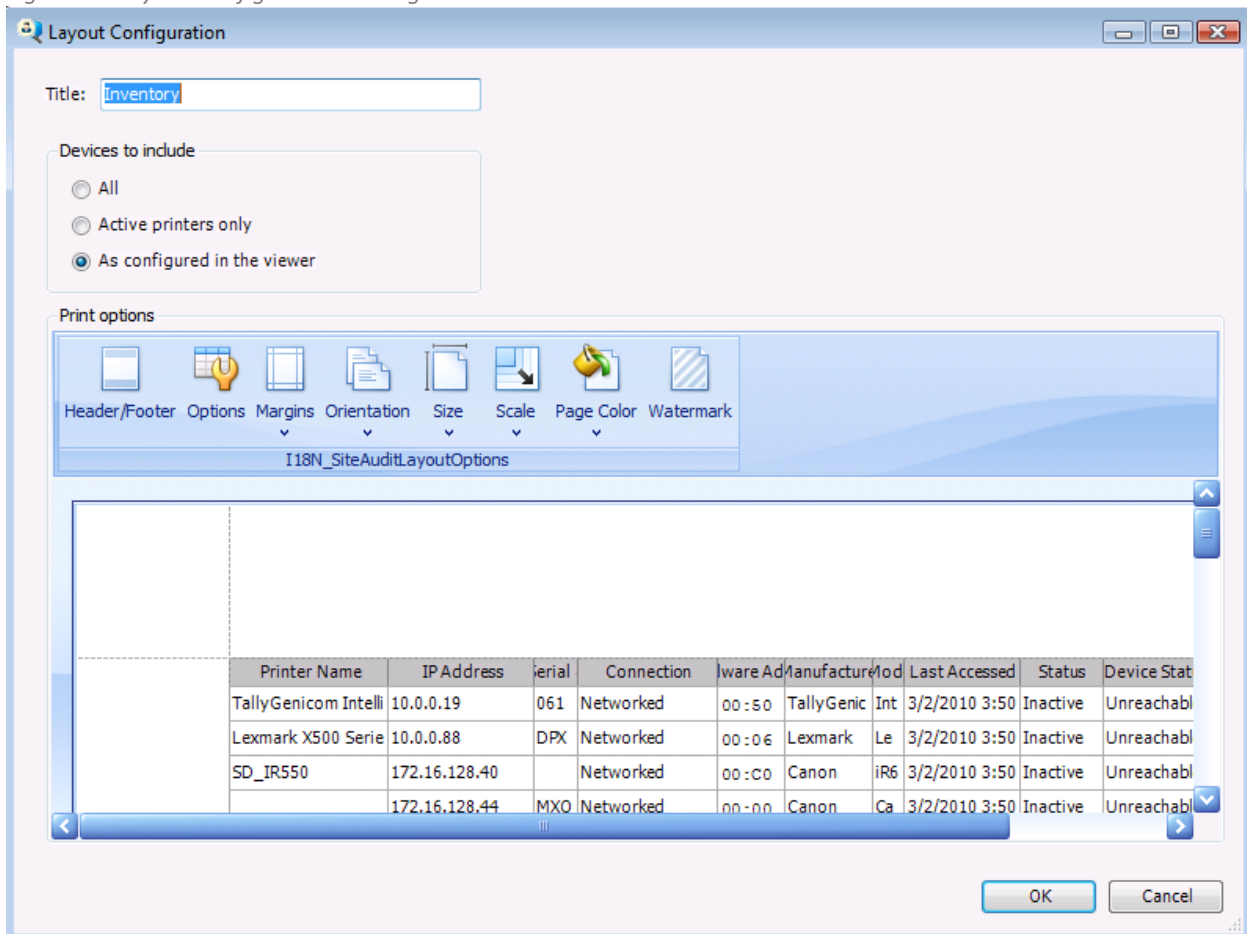
The Output file extension is the extension that will be applied to the report when it is created. By default the report extension is XML; however, if your stylesheet transforms the report into another format such as CSV, TXT, HTML, et cetera, then enter the desired extension in the *Output file extension* textbox.

## Layout Configuration

The *Layout Configuration* dialog allows users to add report styling information that is saved with the view. Users can customize a report by modifying the page layout and margins, adding footers, headers, watermarks, page number information, et cetera. This section describes the options available in the *Layout Configuration* dialog.

The *Layout Configuration* dialog can be opened by selecting the **Reports > Layout** menu item.

Figure 6 – Layout Configuration Dialog



### Title

The title of the report should be entered into the Title textbox.

## Devices to Include

The *Devices to include* option allows users to specify which devices to include in the report. Each option is explained below.

- **All** – include all discovered printers
- **Active printers only** – includes only active printers
- **As configured in the viewer** – only devices that are configured to appear in the viewer will be included in the report

## Print Options

The print options allow users to change various aspects of the page. Each option is described below.

## Header and Footer

The header and footer options allow users to enter various data in the report footer and header. For instance, users can include a page number, date and time when the report was printed, the user name, or custom text. A font can be configured separately for the header and footer. An example report with header information is shown in Figure 8.

The *Header and Footer* dialog can be opened by clicking the **Header/Footer** button in the *Layout Configuration* dialog.

Figure 7 – Header and Footer Dialog

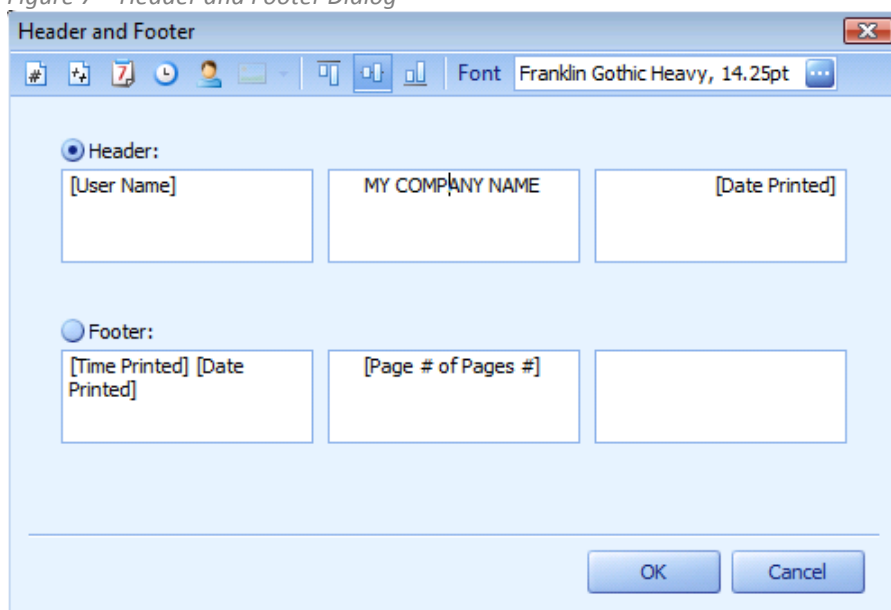


Figure 8 – Example Report with Header

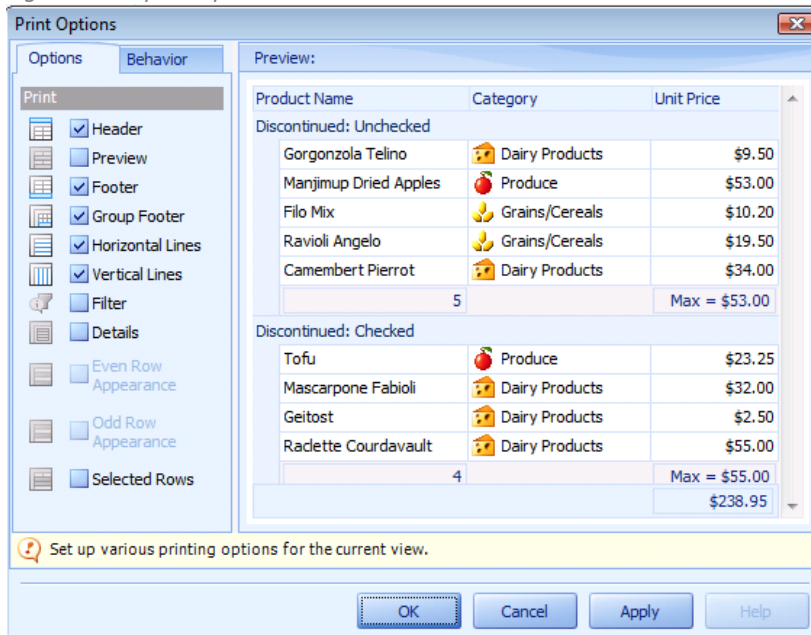
SiteAudit		MY COMPANY NAME				4/7/2010			
Printer Name	IP Address	Serial	Connection	Ware Ad	Manufacture	Mod	Last Accessed	Status	Device Status
TallyGenicom Intelli	10.0.0.19	061	Networked	00:50	TallyGenic	Int	3/2/2010 3:50	Inactive	Unreachable
Lexmark X500 Serie	10.0.0.88	DPX	Networked	00:06	Lexmark	Le	3/2/2010 3:50	Inactive	Unreachable
SD_IR550	172.16.128.40		Networked	00:C0	Canon	iR6	3/2/2010 3:50	Inactive	Unreachable
	172.16.128.44	MXQ	Networked	00:00	Canon	Ca	3/2/2010 3:50	Inactive	Unreachable
iR4570	172.16.128.54	SKU	Networked	00:00	Canon	Ca	3/2/2010 3:50	Inactive	Unreachable

### Print Options Dialog

The *Print Options* dialog can be opened by selecting **Options** from the *Layout Configuration* Dialog. The *Print Options* dialog contains a tab for **Options** and one for **Behaviors** and contains a sample preview section as shown in Figure 9. It is also possible to see how the actual report will look by clicking the **Apply** button and viewing the report in the *Layout Configuration* dialog. The settings applied in the Print Options dialog will be saved with the report regardless if the report is printed.

The following sections describe each option in the Options tab.

Figure 9 – Report Options



## Options

### Header

Select this option to display the header on a SiteAudit report

### Footer

Select this option to display the footer in the SiteAudit report

### Group Footer

Select this option when the view has been grouped by one or more columns and aggregates are displayed for each group. If this option is selected, the grouped footer will be displayed in the report. The Figures below show an example of a grouped footer that shows the number of rows in each group.

Figure 10 – Grouped Filters. Shows the number of each manufacturer devices

IP Address	Model	B/W Copy	B/W All	B/W Pri	Color All	Duplex	
Manufacturer: Canon							
							32
Manufacturer: Dell							
							1
Manufacturer: Hewlett-Packard							
							2
Manufacturer: KYOCERA MITA							
							1
Manufacturer: Lexmark							

### Horizontal Lines

Select this option to show horizontal lines between rows in the SiteAudit report

### Vertical Lines

Select this option to show vertical lines between columns in the SiteAudit report

### Filter

Select this option to display the view filter information in the report.

### Details

Selecting Details expands the rows in a view to display the detail information. Select this option if a view contains sub-view details. Currently, there are several views in SiteAudit that contain details. These include: Summary, Inventory, Problem Analysis, Configuration Details, and Discovery Progress. The Figures below show a report with and without Details selected.

Figure 11 – Example Summary View without Details Selected

<b>Executive Summary</b>
<b>Inventory</b>
<b>Volumes</b>
<b>Efficiency</b>
<b>Reliability</b>

Figure 12 – Example Summary View with Details Selected

Executive Summary	
Description	Value
Time period	12/14/2009 9:00:15 AM to 3/2/2010 5:56:49 PM
Department	Canon VPN
Total volume	563
Networked	563
Direct Connect	
Average Uptime	98.913 %
Metric	Value
Users per device	0.171
Pages per user	80.429
Metric	Value

Selected Rows

When this option is selected, the only device data that will be included in the report are the rows that are selected in the view.

## Behaviors

The following sections describe each of the Behavior options

### Auto Width

When the Auto Width option is selected, SiteAudit will display all columns within the defined page borders. When this option is not selected, the widths of the view columns are used. This means that if the column widths exceed the width of the page, the columns that do not fit on the page will be inserted onto a new page.

### All Details

When this option is selected, all of the view details will be expanded in the report

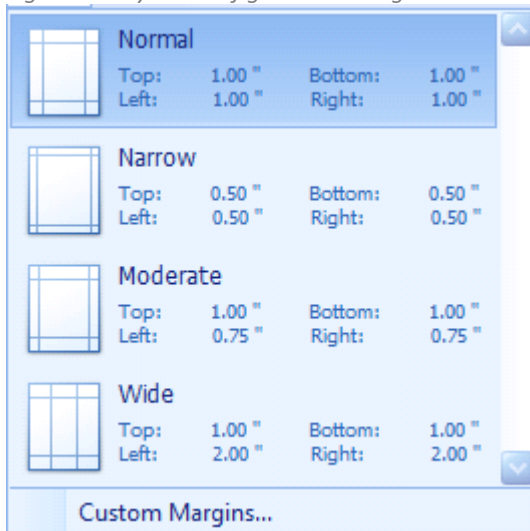
### All Groups

When this option is selected, all of the groups will be expanded in the report even if they are not expanded in the view.

## Margins

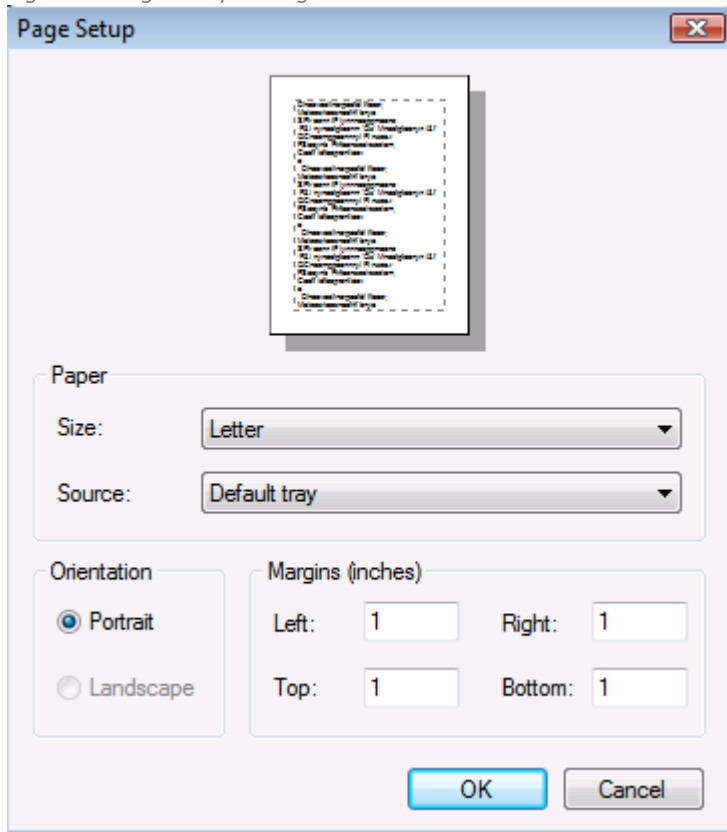
The report page margins can be set by clicking the *Margins* button in the *Layout Configuration* dialog and choosing one of the layouts shown in the Figure below or by choosing *Custom Margins...* and setting the margins manually.

Figure 13 Layout Configuration Margins



Selecting *Custom Margins...* will display the *Page Setup* dialog that allows the user to configure the page setup manually. See the *Page Setup* dialog below.

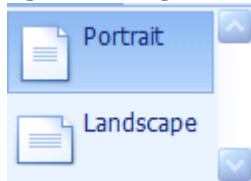
Figure 14 Page Setup Dialog



## Orientation

The report page orientation can be configured by selecting Orientation from the Layout Configuration Dialog. The figure below shows the available options.

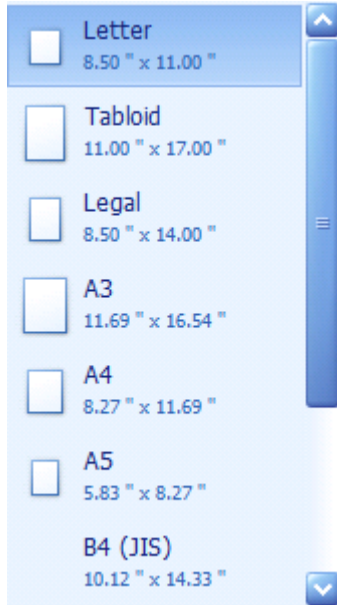
Figure 15 – Page Orientation options



## Size

The paper size can be selected by clicking the Size button in the Layout Configuration dialog and choosing the desired page size. The figure below shows some of the available size options.

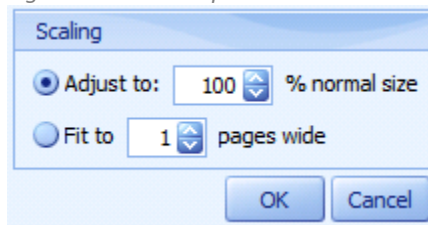
Figure 16 – Paper Size Options



## Scale

Scaling a page allows more or less information to be displayed in the report. To scale the report, select Scale from the Layout Configuration dialog and enter the desired information into the Scaling dialog shown below.

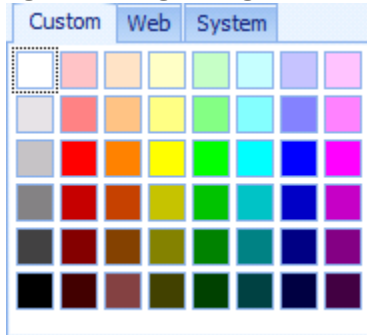
Figure 17 – Scale Options



## Page Color

The background page color can be selected by clicking the Page Color button in the Layout Configuration dialog. The figure below shows the available options.

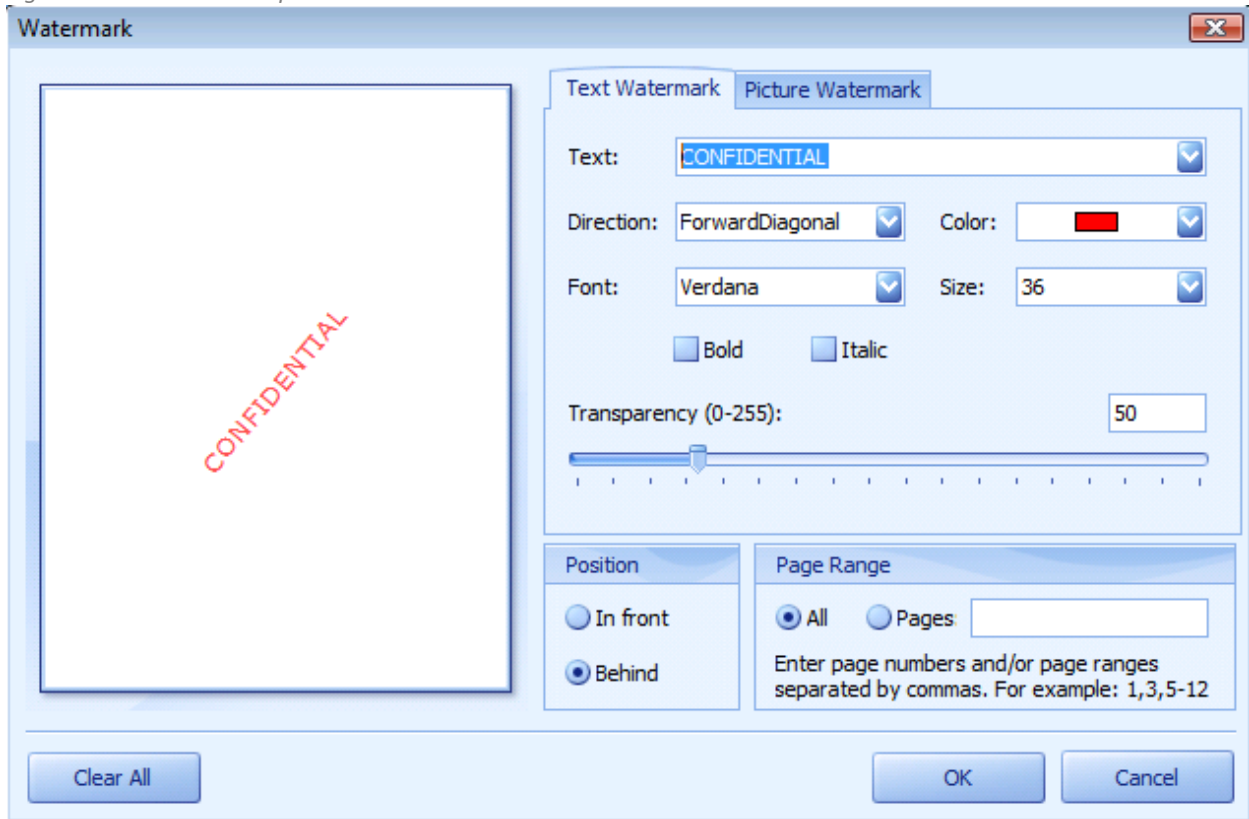
Figure 18 – Page Background Color Options



## Watermark

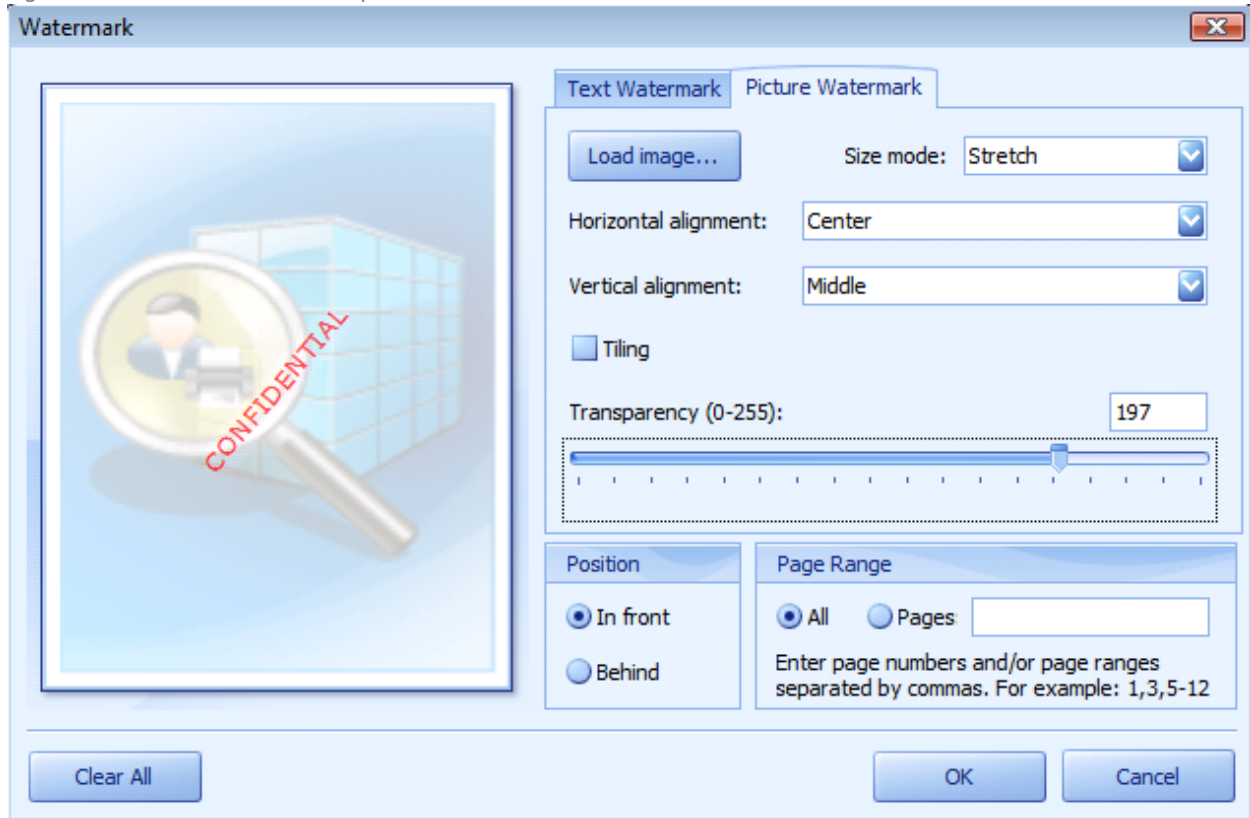
Users can add a watermark to a report by selecting the Watermark button from the Layout Configuration dialog and entering the desired information.

Figure 19 – Watermark Options



It is also possible to include graphical watermarks by selecting the Picture Watermark tab and entering the desired information.

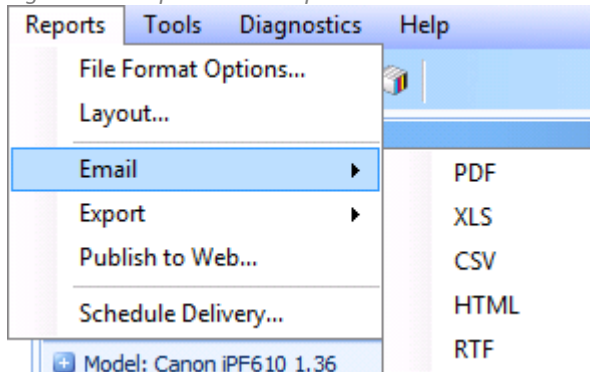
Figure 20 – Watermark Picture Options



## Emailing a SiteAudit Report

Emailing a report in SiteAudit 4.0 is very easy. Reports can be emailed as an attachment and can be formatted as PDF, XLS, CSV, HTML, or RTF. To email a report, an email client must exist on the machine where the SiteAudit Viewer is installed. Select the report type from the **Reports > Email** menu items. Once a format is selected, the email client will be opened automatically and the report will be attached to the email. The user must enter the recipients and send the email. The figure below shows the Email menu items.

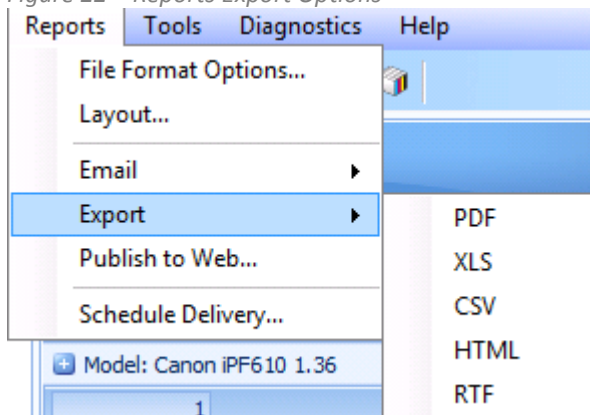
Figure 21 – Reports Email Options



## Exporting a SiteAudit Report

It has always been possible to export views in SiteAudit. However, SiteAudit 4.0 provides the ability to export reports as well. Reports can be exported and saved in the following formats: PDF, XLS, CSV, HTML, or RTF. Simply select the desired export format and specify where the report should be saved. The figure below shows the Export format options.

Figure 22 – Reports Export Options



## Saving a Custom View

In SiteAudit v4.0 and later it is possible to save customized views, which can then be published to the SiteAudit Reporting Web site, scheduled to be archived or delivered via email. Once a view has been configured as desired, select the **File > Save** or **File > Save As** menu item and save the view.

## Opening a Custom View

Saved views can be opened and displayed in the SiteAudit Viewer by selecting **Open** from the **File** menu and choosing the view to open or by selecting the view name from the **File > Recent Views** menu.

When a view is in the SiteAudit Viewer, the view file name and path are displayed at the top of the SiteAudit Viewer as shown in the screenshot below. The view from name is displayed above the Company name with a diamond symbol to indicate that the displayed view is a custom view.

Figure 23 – SiteAudit Viewer with Custom View Loaded

