

SiteAudit Visualizer Guide

June 2014

In This Article:

- Visualizer Overview
- License & Installation
- Visualizer Operations

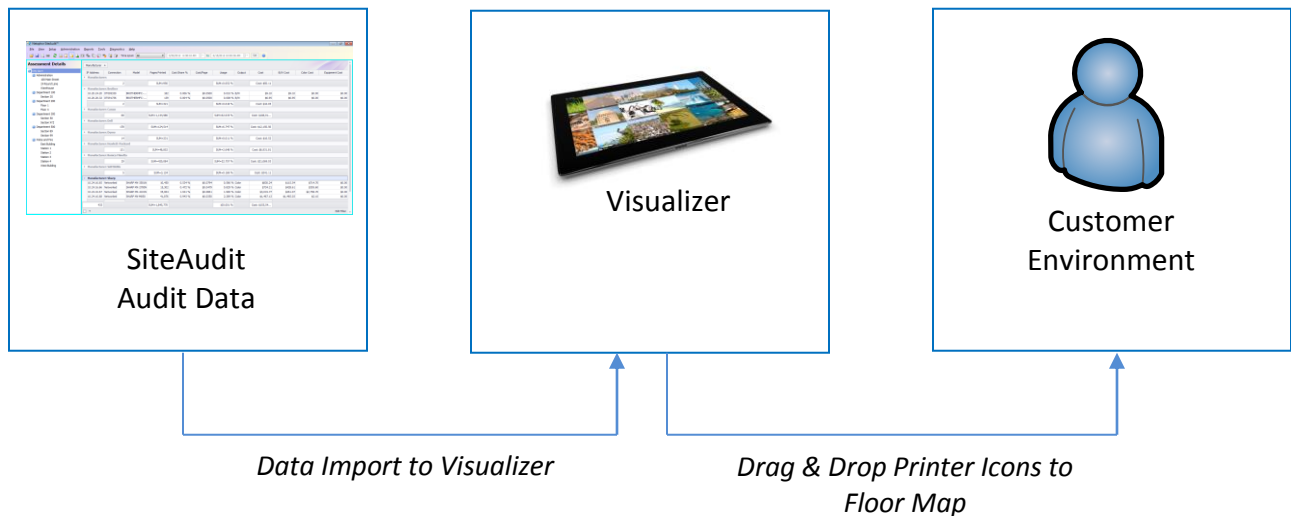
This article provides information for installing and operating SiteAudit Visualizer™. The audience for this article is audit advisors and technical consultants.

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Basic Workflow

The process of using Visualizer starts with collected SiteAudit data. Typically data is selected from a specific time span such as for 30 or 60 days. An audit advisor or consultant will select a date range then export the data via the SiteAudit viewer. Visualizer runs as a Visio plug-in on a separate machine e.g. tablet or same machine where the data is collected. The data will be imported into Visualizer. A floor map will be selected and the advisor or consultant will walk the customer's floor dragging and dropping printer icon where the physical printers are located. Once this is complete the advisor can perform utilization or other analysis using Visualizer to optimize the printer placement.



Data can be used from all SiteAudit data collection software including the following software:

- SiteAudit OnSite
- SiteAudit Hosted
- SiteAudit Compact

Visualizer Prerequisites

Before Visualizer can be installed and operated there are several prerequisites which must be installed. These are listed below.

1. Microsoft Visio 2010 Professional Edition
 - Visio 32-bit for 32-bit systems
 - Visio 64-bit for 64-bit systems
2. Microsoft .NET4.0*
3. SiteAudit V6.x Viewer*
4. Visual Studio 2010 Run Time Distributable*
5. License with Visualizer Capability

* Available from the Netaphor software download site

Visualizer License

Visualizer is licensed as an additional capability of SiteAudit. Existing V6.x licenses can be upgraded to include Visualizer or Visualizer can be included in a new license. There is an additional cost for the Visualizer capability. Cost inquiries can be made to sales@netaphor.com

To obtain a Visualizer license contact licensing@netaphor.com. Include in your email the current license key and the version of SiteAudit you are running.

Note: Once the Visualizer license capability has been added to your license key it can be confirmed by checking the Configuration Details located under the Diagnostics menu.

License information	
Description	Value
User ID	19D2482130A24B91:d\Nsy7wu7CQj62Lizxacw==
License key	TRIAL-4
License period	License valid from 10/21/2013 to 7/1/2015
License features	Trial, Monitoring, WebReports, OfficeReports, HostedAdministrator, PrinterLicenser, EmailServiceUser, UnmanagedPrintersReport, VisioVisualizer

Recommended Platform

Visualizer is designed to run on a PC/Laptop or Tablet running Windows 7 or 8. Consideration to adequate screen size is important to facilitate mobile usability. The recommended system configuration is below.

Operating System	Hardware	Applications
<ul style="list-style-type: none">Windows 7Windows 8.x	<ul style="list-style-type: none">PC/Tablet 4GB RAMPC/Tablet 4GB RAM	<ul style="list-style-type: none">Visio 2010 PE/SiteAudit 6.x ViewerVisio 2010 PE/SiteAudit 6.x Viewer

Suitable platforms include the Microsoft Surface Pro products, Lenova ThinkPad Helix and other popular tablets from a variety of manufacturers.

Visualizer Installation

Before installing the Visualizer please install the prerequisites first.

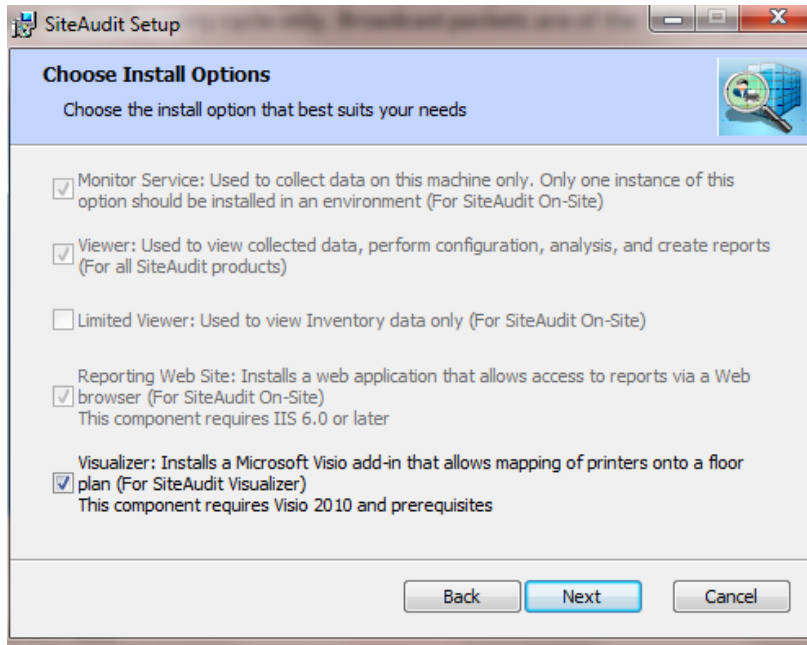
- Microsoft Visio 2010 Professional Edition
- Microsoft .NET4.0*
- SiteAudit V6.x Viewer*
- Visual Studio 2010 Run Time Distributable*
- License with Visualizer Capability

* Available from the Netaphor software download site (www.netaphor.com) Follow the 'Try It Out' home page link.

Install SiteAudit V6.x. It can be installed over previous versions of SiteAudit. If you have already installed V6.x without the Visualizer capability you should install the prerequisites first and then reinstall V6.x.



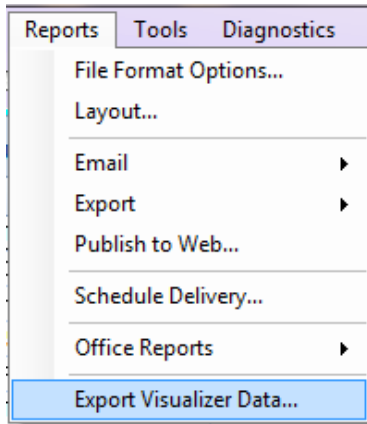
Select **Next**



Check the Visualizer box and then **Next**

Note: If you do not have the prerequisites installed the Visualizer installation option will be grayed out.

Complete the installation process. Once the SiteAudit installation is completed launch the SiteAudit viewer and go to the Reports menu. The Visualizer license enables a new menu item called Export Visualizer Data.



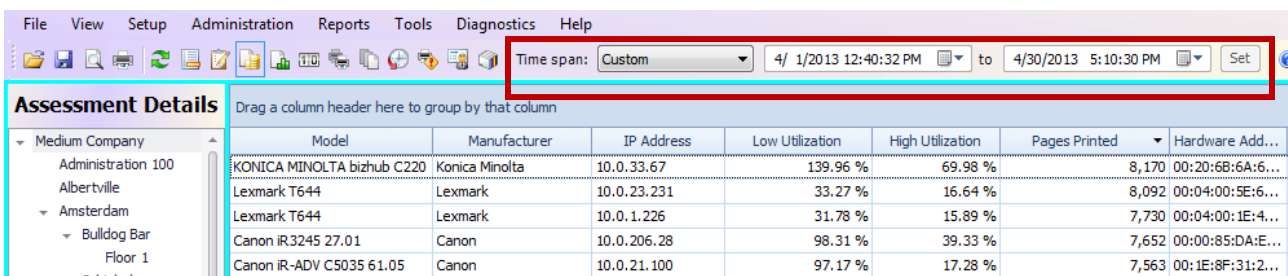
You can now export data so it can be imported into Visualizer.

SiteAudit Viewer Operations

A SiteAudit viewer licensed for the Visualizer is required. The SiteAudit viewer allows the audit advisor or consultant to specify the data and the date range desired for export. It allows the filtering of inventory, for example by manufacturer, model, department etc..., for export. The Visualizer also has the capability for filtering so it may be desirable to export all inventory.

To **export data** do the following;

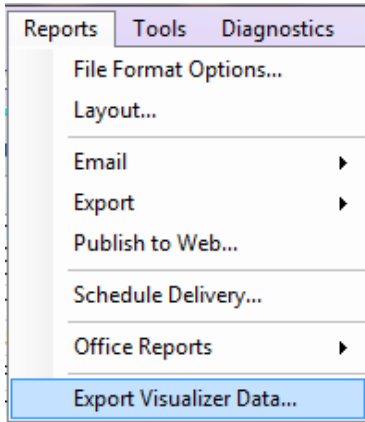
- 1- Select the Assessment Details or Volume Analysis view.
- 2- Use Edit Filter to select the manufacturers, models you want to map or use all inventory
- 3- Go to Time Span and select the date range you want. A 30-day date range is recommended



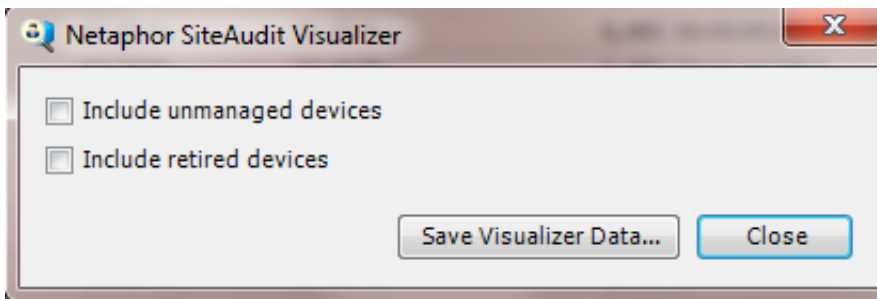
SiteAudit Viewer

- 4- Select the **Set** button

5- Go to the Reports menu and select the **Export Visualizer Data**

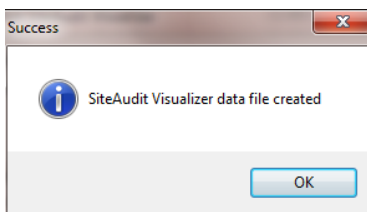


6- The option to include unmanaged and retired printers is presented. Unmanaged printers will provide only Inventory data unless you are licensed for unmanaged printers. If you are licensed for unmanaged printers volume and utilization data is present. Retired printers will provide data up to the date they were retired.



If you are running a 30 - 60 day audit you may assume all devices are managed and only consider if you want to include retired devices in the export.

Select **Save Visualizer Data...** You will be prompted to add a file name and then select Save.



Once the Visualizer data file has been created you will see this message and then click **OK**. The data export has been saved. The format saved is .csv. An example is FloorMapData1.csv.

The file should be accessible by Visualizer as it will be used as the Data Source.

Preparing to Use Visualizer

SiteAudit Visualizer runs as a Microsoft Visio 2010 Professional Edition plug-in. A SiteAudit viewer licensed for Visualizer must run on the same PC/Laptop or Tablet as the Visualizer plug-in.

To prepare for Visualizer operations the audit advisor or consultant should have two items:

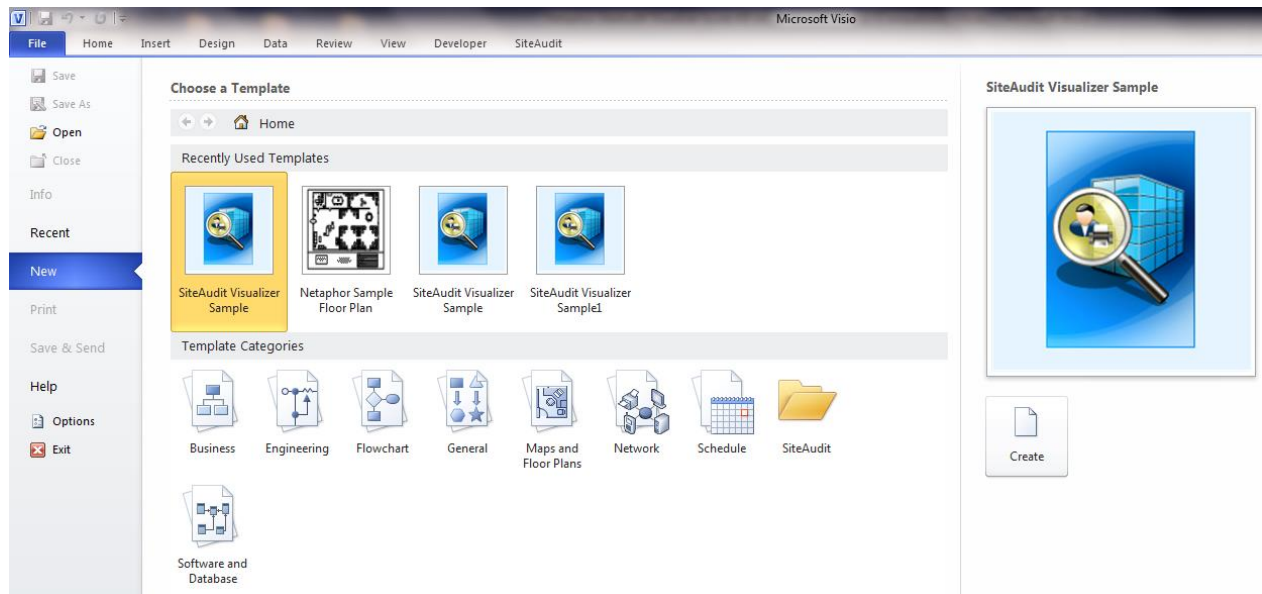
1. Customer floor map(s) as a saved image file or the knowledge to use Visio to create floor maps
2. The Data Source file(s) exported by SiteAudit Visualizer Export Data found under the Reports menu. The file(s) is in .csv format.

Map Image Formats

Floor map format supported include .jpg, .gif, .png, .bmp, .tiff or .wmf.

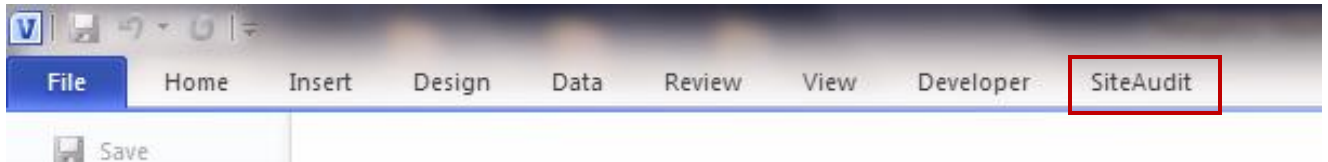
Visualizer Operations

To begin Visualizer operations launch Visio 2010 Professional Edition.



SiteAudit Visualizer

If you have never launched Visio with the Visualizer plug-in before it will prompt you to



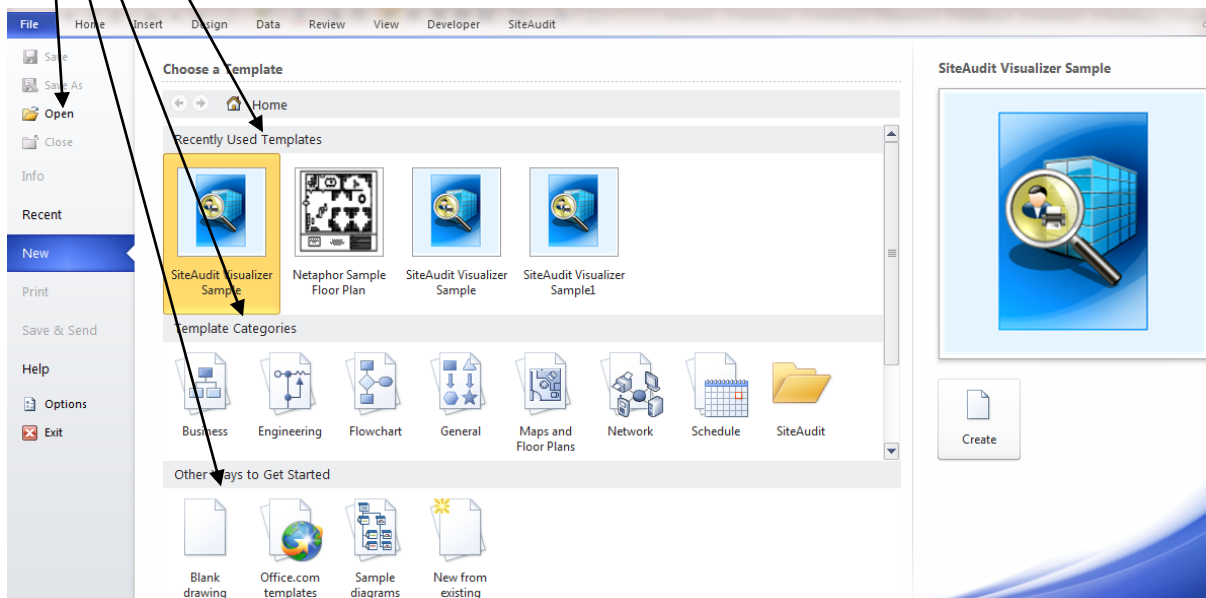
Once Visio with the Visualizer plug-in is launched the SiteAudit menu item is visible.

Steps to Create a Visualizer Floor Map

A Visualizer floor map can be created from any image file or a Visio template. The audit advisor or consultant starts the process by doing one of the following:

1. Selecting a Recently Used Visualizer Template
2. Selecting a Visio Template Category such as Maps and Floor Plans
3. Selecting a Blank Visio Template and building a floor plan from scratch
4. Opening an image file such as a floor plan saved as a .jpg file

Each of these options is provided through the Visio plug-in.



SiteAudit Visualizer

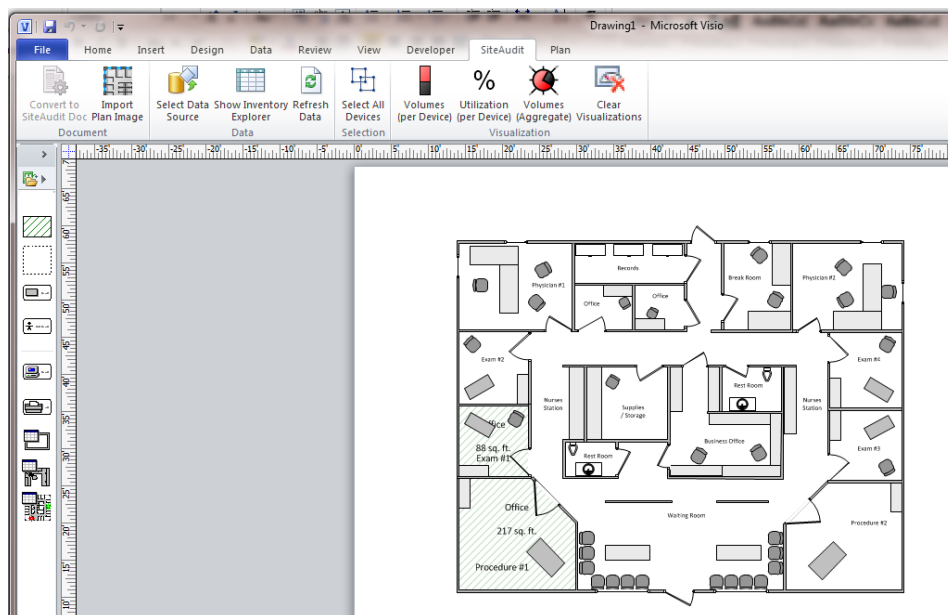
If a customer floor plan is not available the audit advisor or consultant may also select the Visualizer sample floor plan.

SiteAudit Visualizer Sample



Sample Visualizer Floor Plan

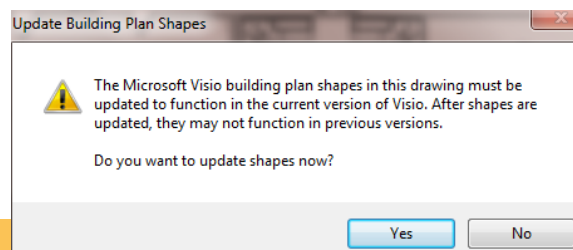
Select the **Create** button. The sample floor plan is launched.



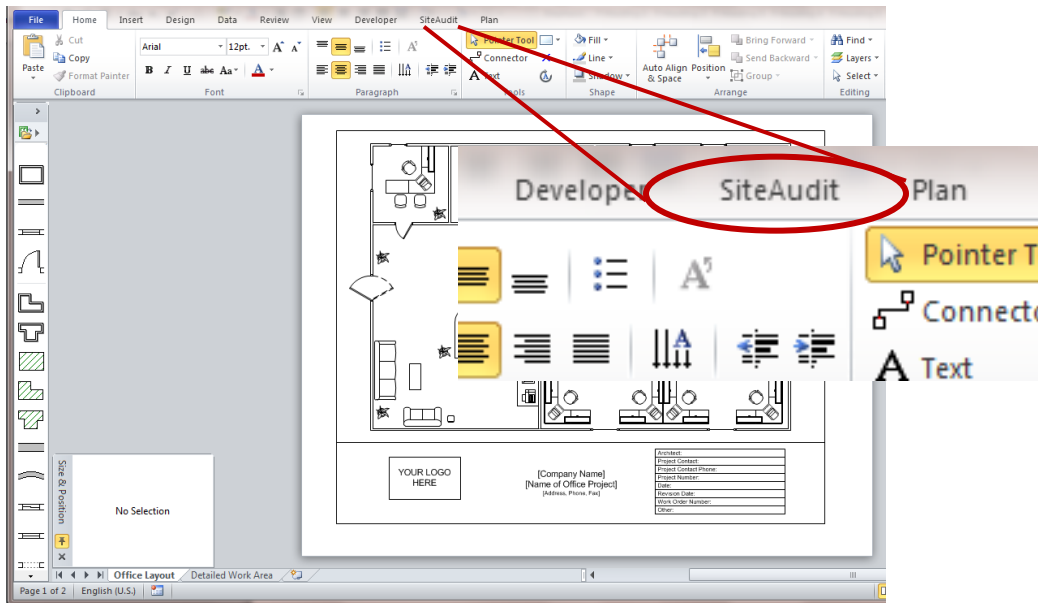
Using the Visualizer Visio sample floor plan provides a quick floor plan which can be modified to specific requirements. It can also be used for demonstration purposes.

If the audit advisor or consultant decides the best process for creating a floor map is to select a Visio Template, or a blank template or an image file (items #2, #3 and #4 above) the following procedure is followed.

1- Open the desired file, you may be asked to update the shapes now, select **Yes** and continue

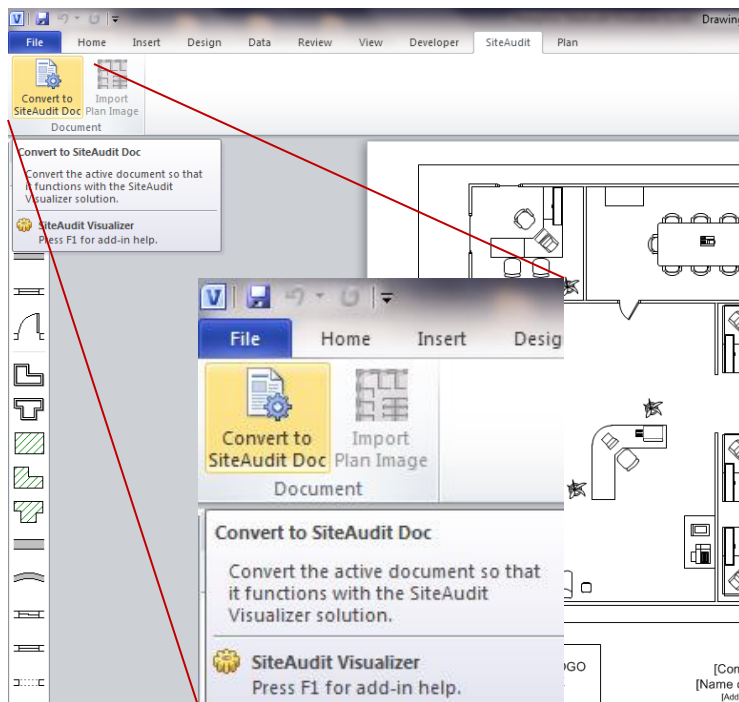


The floor plan is now open. Next select the **SiteAudit** plug-in menu



Opened Visio Floor Plan

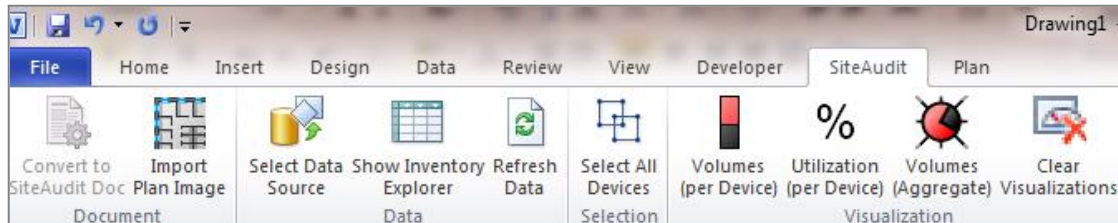
2- Select **Convert to SiteAudit Doc** and this will convert the document so it can be used with the Visualizer.



Once this is complete a set of customer Visualizer add-ins is displayed which will allow the audit advisor or consultant to select the Data Source, Open the Inventory Explorer and work with the analysis add-ins.

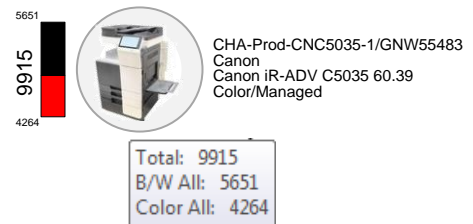
Visualizer Add-ins

The add-ins provides the mapping and analysis capability of Visualizer.



Visualizer Add-ins

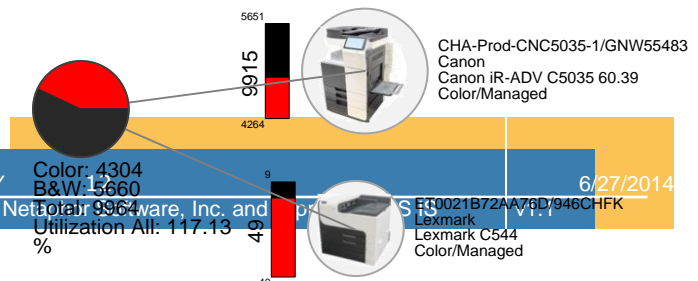
- **Select Data Source** – first step after converting the floor plan format to a SiteAudit Visualizer document. Use this button to find the SiteAudit Data Export and import the data into the Visualizer.
- **Show Inventory Explorer** – typically the second step and opens an inventory view of the printers to be mapped to the floor plan(s).
 - a) The Inventory Explorer can filter, group and sort inventory by Manufacturer, Model, Department, Device Type and other data fields. It utilizes the customization Chooser that provides flexible filtering in the SiteAudit viewer.
 - b) Printer(s) are dragged and dropped from the Inventory Explorer as icons on to the floor map(s).
- **Volume (per Device)** is an analysis metric that indicates the amount of monochrome and/or color printing for the data period typically one month. To see the volume break in text format mouse over the printer icon.



- **Utilization (per Device)** is an analysis metric that indicates the low utilization percentage for the data period, typically one month. A percentage that is Red color indicates above low utilization. A green color indicates below low utilization

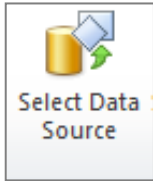


- **Volume (Aggregate)** is an analysis metric indicating the aggregate or sum of the selected printers. Two or more printers can be selected.

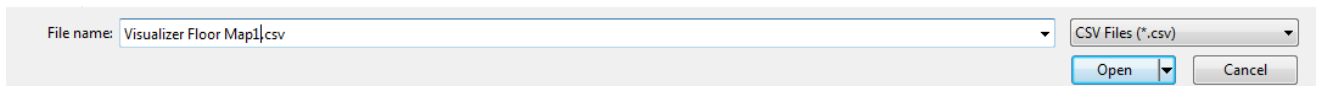


Selecting the Data Source

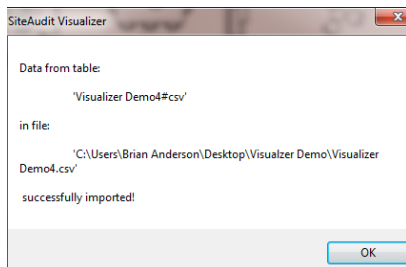
The Visualizer export data must be selected before use Inventory Explorer can be used. To select a data source select the **Data Source** add-in button.



Find the data export and select **Open**



A screen will pop up indicating the data import was successful.

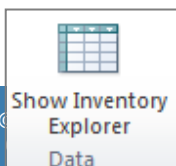


The audit advisor or consultant can now open the Inventory Explorer and begin the mapping process.

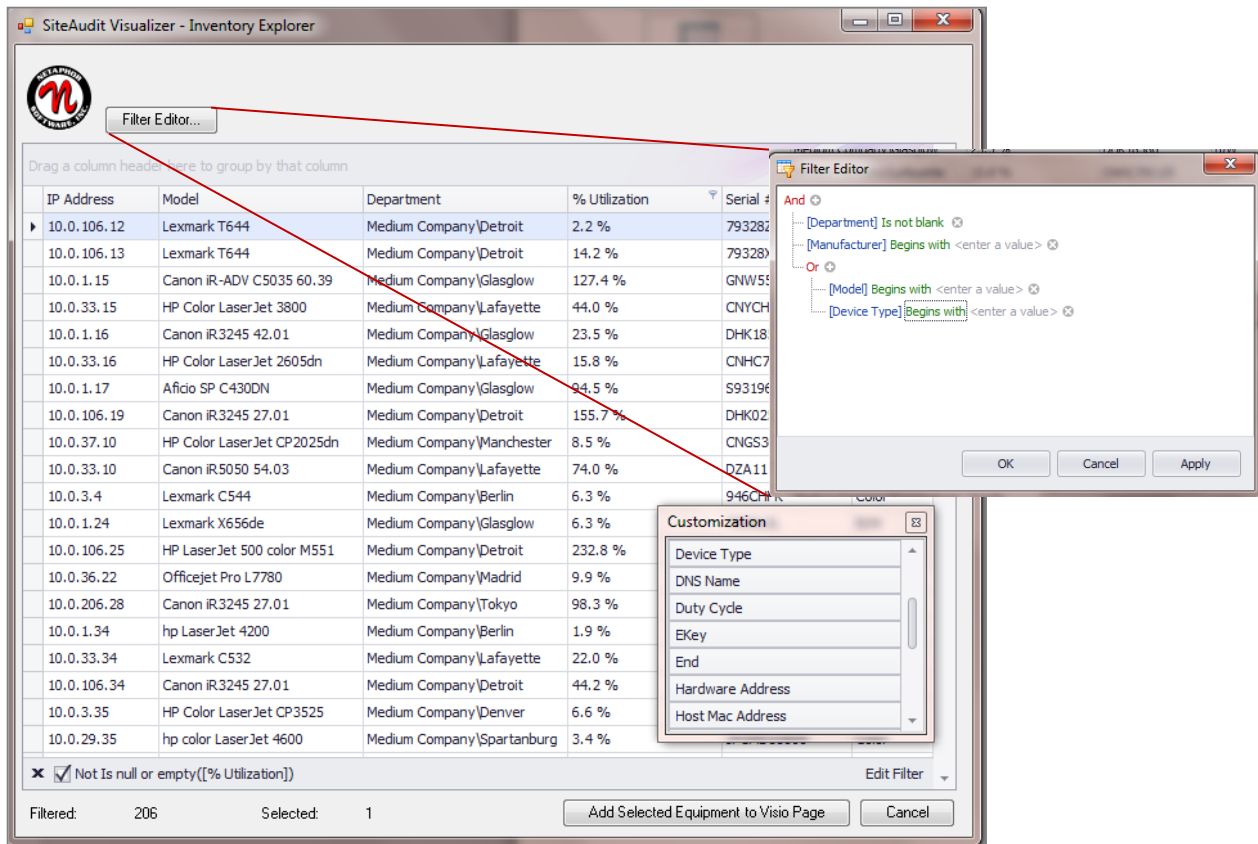
Selecting & Using the Visualizer Inventory Explorer

The Inventory Explorer shows the printers which have been imported into Visualizer. The audit advisor or consultant can filter, group and sort the list. Once the printer(s) have been identified for placement on the map then they can be dragged from the Inventory Explorer onto the floor plan.

To open the Inventory Explorer select the **Show Inventory Explorer** add-in button.



The Inventory Explorer will open, can be resized and positioned to allow easy dragging of printer icons to the floor map.

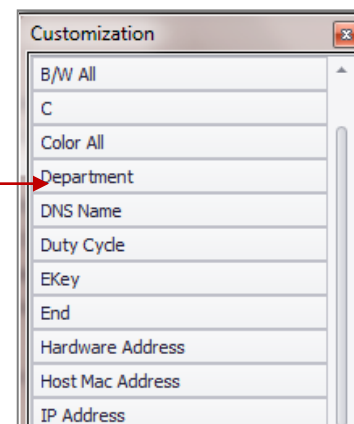


Visualizer Inventory Explorer

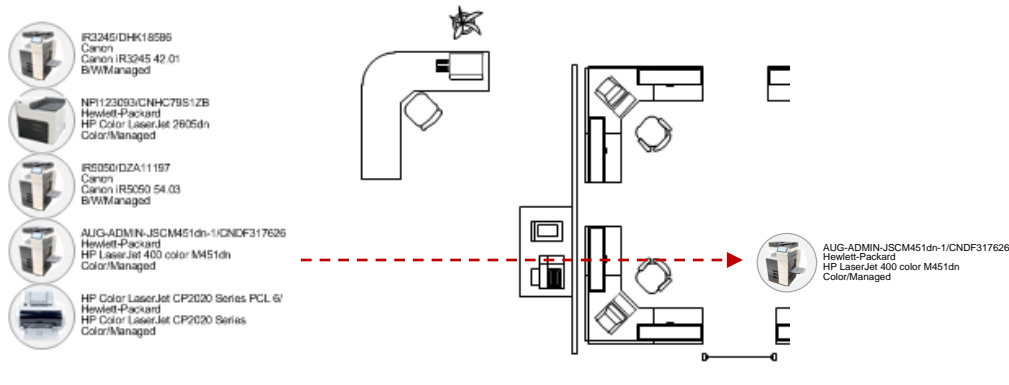
The Inventory Explorer allows the filtering of printers. Use the **Filter Editor** to identify specific printers for mapping.

To use the Inventory Explorer do the following:

- 1- Select the desired Column Fields into the Inventory Explorer window. Right on any Column head and select Column Chooser to bring up the Customization list
- 2- Select one or more printers—hold the Control Alt key to select more than more printer
- 3- At the bottom of the Inventory Explorer select the button marked **Add Selected Equipment to Visio Page**, this will add the printers to the floor plan. The number selected devices is indicated as well as the remaining printers in the Inventory Explorer



Networked	SingleFunc...	hp LaserJet 4200	Hewlett-Pack...	USGNX59014	B/W
Networked	SingleFunc...	Lexmark C532	Lexmark	9438ZDH	Color
Filtered:	331	Selected:	3	Add Selected Equipment to Visio Page	
				Cancel	



The printer icons are placed on the map and can be repositioned to their proper place within the map by dragging them to the correct physical location.

Printer Icons

Visualizer provides three printer icons. These are represented by a Multifunction printer icon, a Single Function printer icon and a Local printer icon. A data label accompanies each icon. The audit advisor or consultant can use Visio to color code the icon based on requirement. For example Multifunction printers can be coded Green for color and white for monochrome printer.

Multifunction Printer	 <p>CHA-Prod-CNC5035-1/GNW55483 Canon Canon iR-ADV C5035 60.39 Color/Managed</p>	 <p>CHA-Prod-CNC5035-1/GNW55483 Canon Canon iR-ADV C5035 60.39 Color/Managed</p>
Single Function Printer	 <p>LF_OFFICE_HPCLJ3800/CNYCH70756 Hewlett-Packard HP Color LaserJet 3800 Color/Managed</p>	 <p>LF_OFFICE_HPCLJ3800/CNYCH70756 Hewlett-Packard HP Color LaserJet 3800 Color/Managed</p>
Local Printer	 <p>Okidata ML 321 Turbo/D (IBM) OKI Data Okidata ML 321 B/W/Managed</p>	 <p>Okidata ML 321 Turbo/D (IBM) OKI Data Okidata ML 321 B/W/Managed</p>

Data Labels

A data label is positioned next to all printer icons. It identifies key attributes of the printer. The standard data label includes:

- Printer Name

- Manufacturer
- Model
- Output type (color or monochrome)
- Managed or Unmanaged



CHA-Prod-CNC5035-1/GNW55483
 Canon
 Canon iR-ADV C5035 60.39
 Color/Managed

Standard label



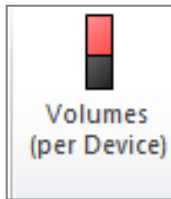
CHA-Prod-CNC5035-1/GNW55483
 Canon
 Canon iR-ADV C5035 60.39
 Color/Managed

Repositioned label

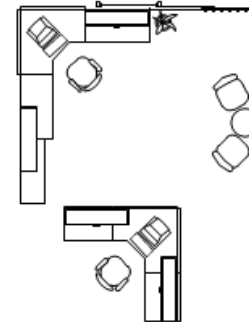
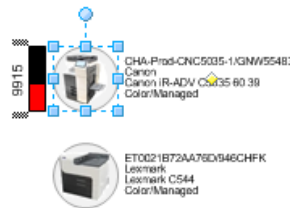
Device labels can be repositioned to better fit their location on the floor map. Simply click on the Yellow diamond to reposition the label.

Visualizer Analysis

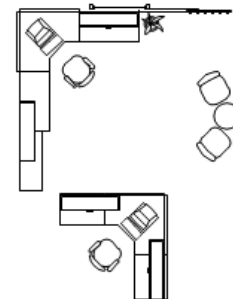
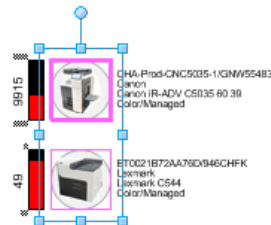
Select any single or group of printer icons to see volumes and utilization metrics.



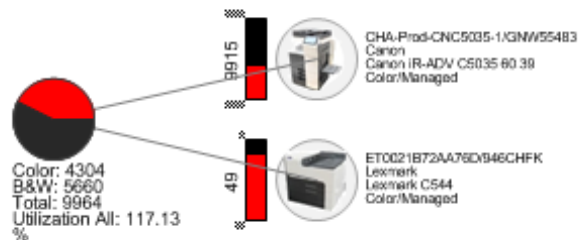
Click on a printer and select **Volume (per Device)** to see volume by color and monochrome



Click on two or more printers and select **Volume (per Device)** and see volume for both devices



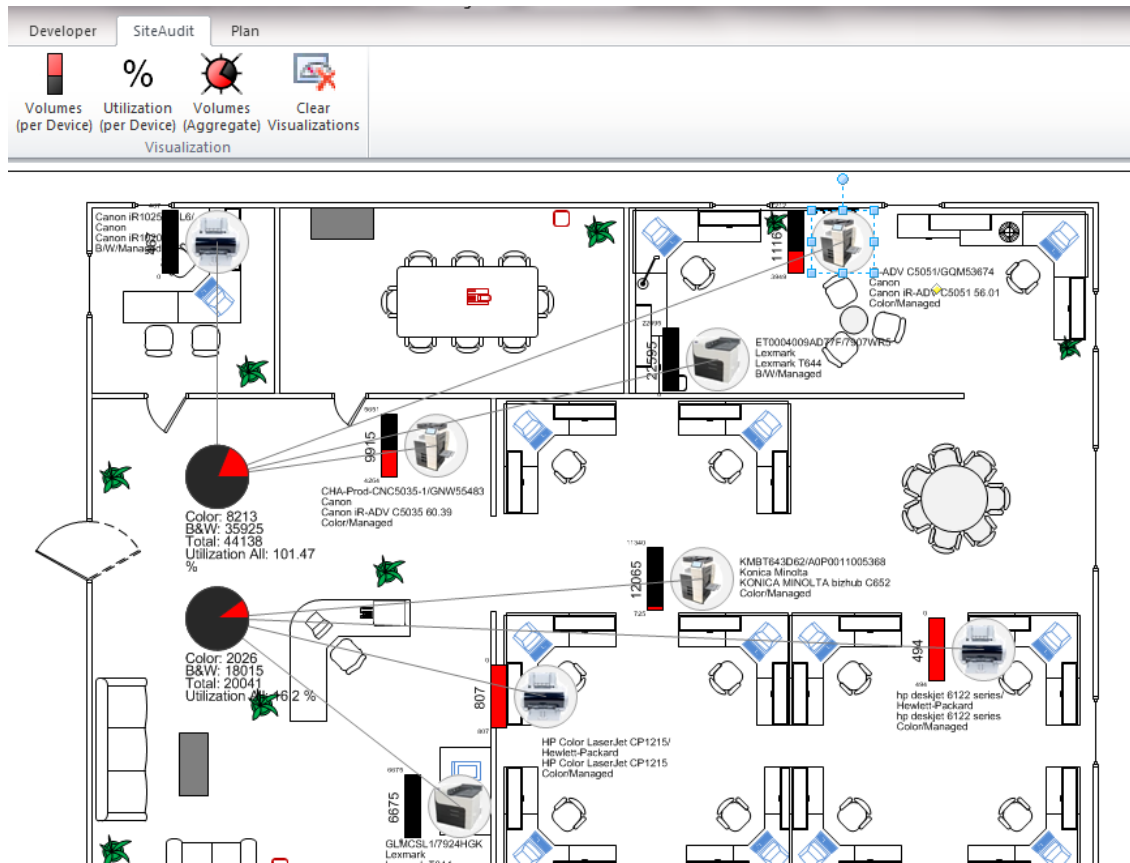
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 Operation Tips — Distribution prohibited, Material Copyright Netaphor



Select Volume (Aggregate) to the sum of both printers and their average utilization

Relocation Analysis

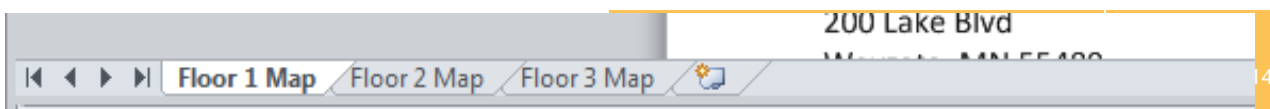
Compare one group of printers versus another by select the top group of printers and the Volume Aggregate and performing the same selection process on the bottom group of printers.



Printer icons can be relocated and their volumes or utilization aggregated to show the impact of relocating printers.

Multi-Floor Map Analysis

The audit advisor or consultant can work on multiple maps using the Inventory Explorer. Just select pages listed e.g. Floor Map 1, Floor Map 2 and Floor Map 3.



Visualizer Frequently Asked Questions

Detailed below are frequently asked questions and their answers regarding Visualizer. You can read more about specific Visualizer topics by visiting the Netaphor support portal, <https://support.netaphor.com/>

- Can printer icon colors change to represent different printer types e.g. color printers?

Yes they can. You can use the Visio font and fill color pallet to colorize and code the printer icons

- Can data labels be changed?

Yes they can. There are certain recommended guidelines such as the number of label runs should not exceed three. The list of possible labels is limited to the data fields in the Customization list. The customization list is displayed by right clicking a column head in the Inventory Explorer and select Column Chooser.

You can read more about specific Visualizer topics by visiting the Netaphor support portal, <https://support.netaphor.com/>

- Can the data export file be modified to include printers that are not in the data collection?

Yes the data export (Data Source) .csv file can be supplemented. The most practical explain is to add analogue devices which cannot be discovered.

You can read more about specific Visualizer topics by visiting the Netaphor support portal, <https://support.netaphor.com/>

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