Periodically Exporting ProtegeGX Reports to a File

Application Note

ICT®eSecurity.

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Periodic Export to File

The Periodic File Export feature enables you to automatically export and save a report (event, user, muster or attendance) to a directory at a set time during the day, or periodically throughout the day. This feature is designed for use by third-party systems that are able to import reports generated by Protege GX.

For this application note we are going to run through two examples that outline how to use the feature:

- Export for an attendance report that is used to calculate employee payroll. This attendance report has its Period set to Previous Day as we only want to see one day worth of events in each report.

- Export a muster report that runs once every hour and displays all users on site.

Prerequisites

This feature requires:

- An operational Protege GX system (with software version 4.2.201 or later)
- The Email Report license enabled on your SSN
- A preconfigured report to use for the file export

Configuring the Reports for File Export

Configuring an Attendance Report for File Export

1. To configure file export for an attendance report, navigate to **Reports | Setup | Attendance**.

2. Select the **File Export** tab.
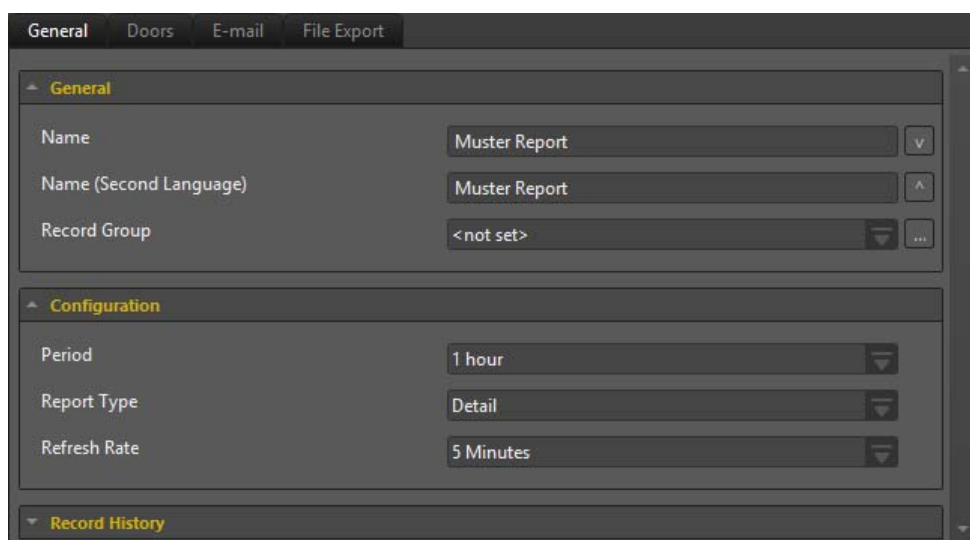
3. From this section:

- Select **Enable File Export**.
- Set the **Report Format**. Reports can be exported as a CSV, PDF, XLS or text file.
- Set the Time that the report will export to the file location.
- For the **Export Directory**, click the ellipsis and select a path for the report to export to.
- If required, enable the **Append Unique ID** to Filename option. Setting this option ensures that older reports are not overwritten when new ones are saved to the same location.
- From the **Days to Export** section, select the days to export the report. As we are using a report that is configured to display the previous day's events, we want the export to occur on Tuesday - Saturday.
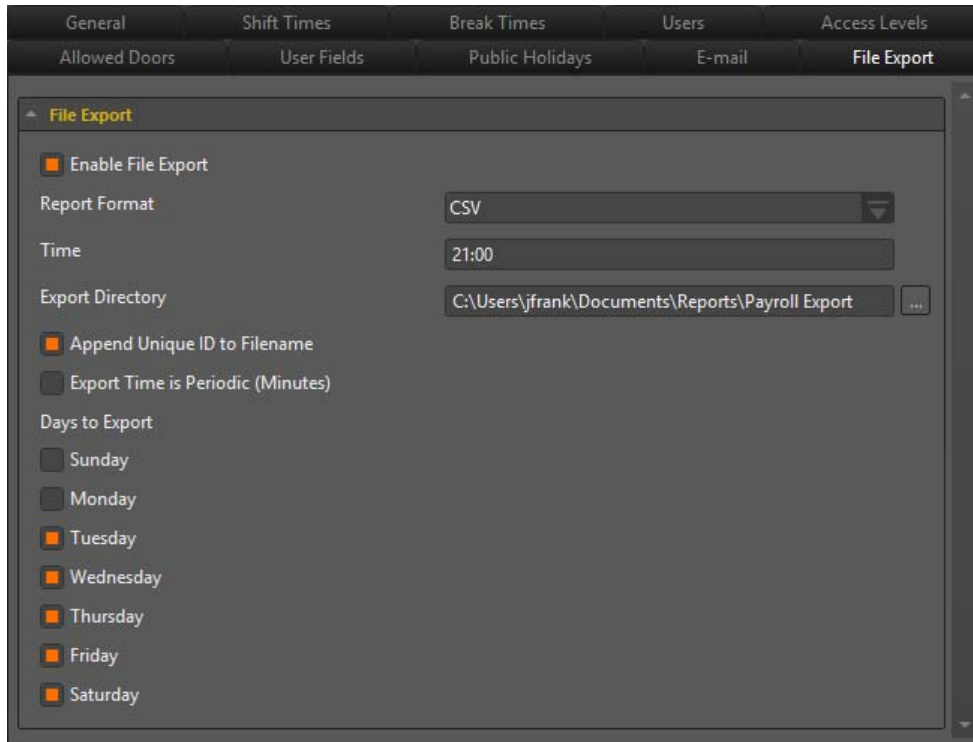
4. Click **Save**.

Configuring a Muster Report for File Export

1. To configure file export for a muster report,navigate to **Reports | Setup | Muster**.

2. Select the **File Export** tab.

3. From this section:

   • Select **Enable File Export**.

   • Set the **Report Format**. Reports can be exported as a CSV, PDF, XLS or text file.

   • As we want this report to export to a file location once every hour, we need to set the Time to 01:00 and enable the **Export Time is Periodic** option. This sets the report to export every one hour, if we wanted to export the report every thirty minutes, we would set the Time to 00:30.

     When the **Export Time is Periodic** option is enabled, you are unable to edit the **Days to Export** section.

   • For the **Export Directory**, click the ellipsis and select a path for the report to export to.

   • If required, enable the **Append Unique ID to Filename** option. Setting this option ensures that older reports are not overwritten when new ones are saved to the same location.
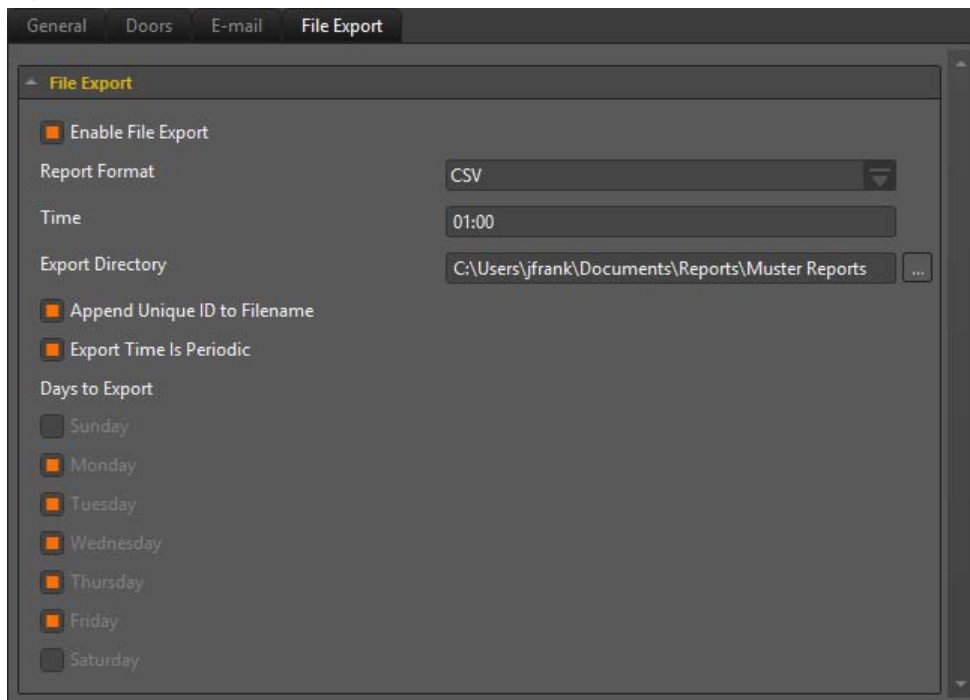

4. Click **Save**.

Viewing the Exported Reports

1. To view the exported reports, navigate to the location set for the **Export Directory** field.
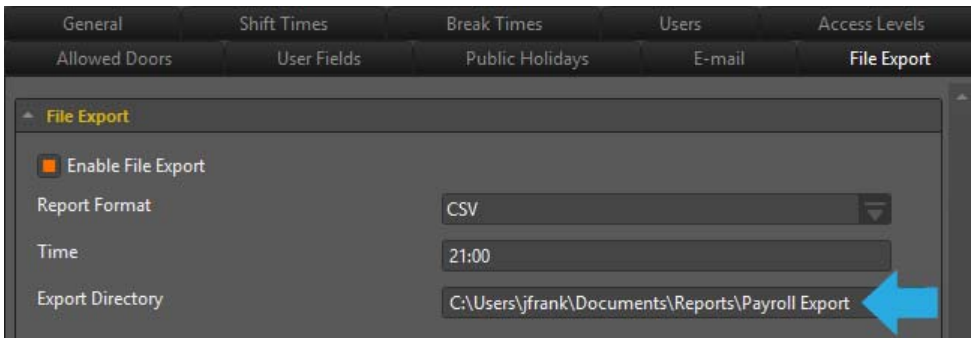
2. The attendance report we used has had the file export function running for a week, so we have five different reports containing events from the previous day. The muster report we used has had the file export function running for nine hours, so nine different reports are displayed.
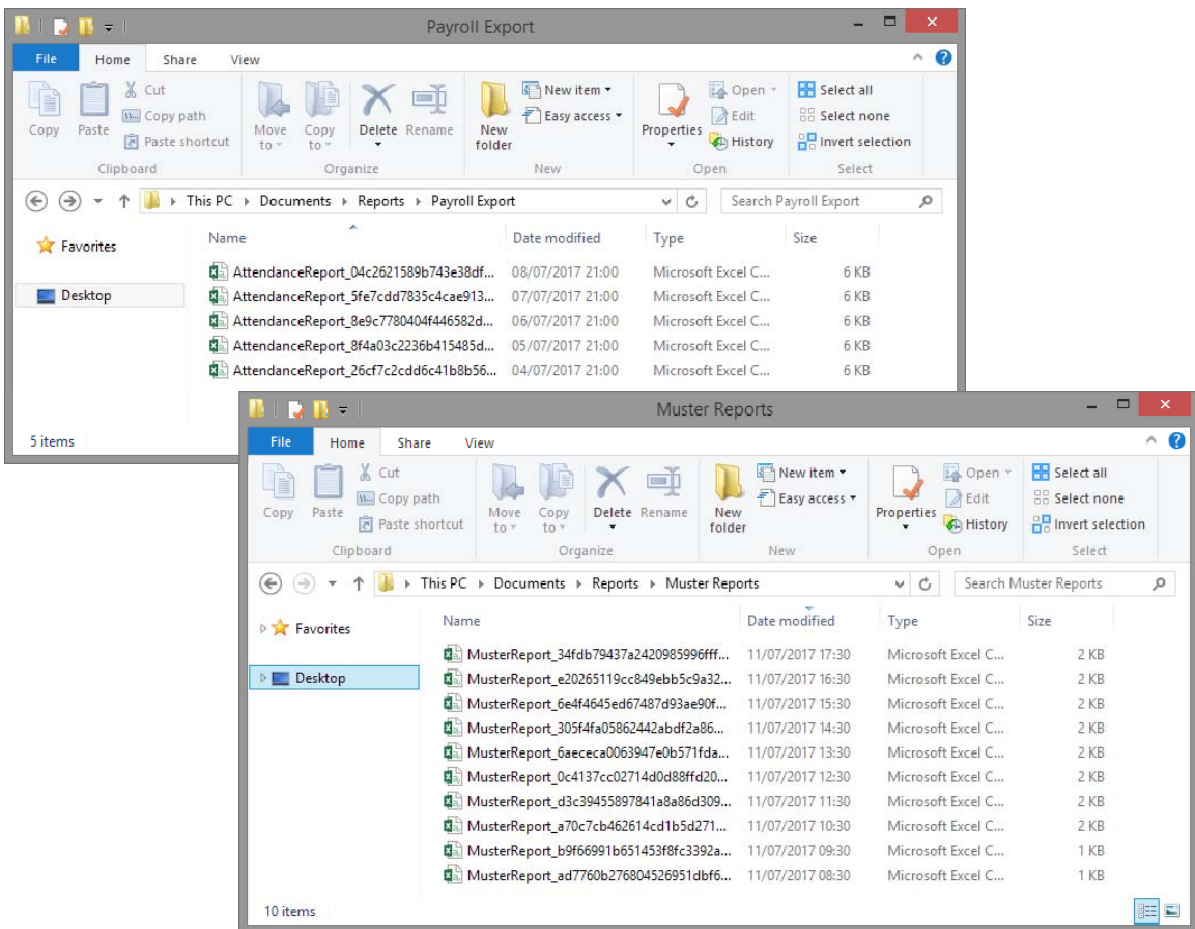
3. The information contained in the reports can then be imported into a third party system.
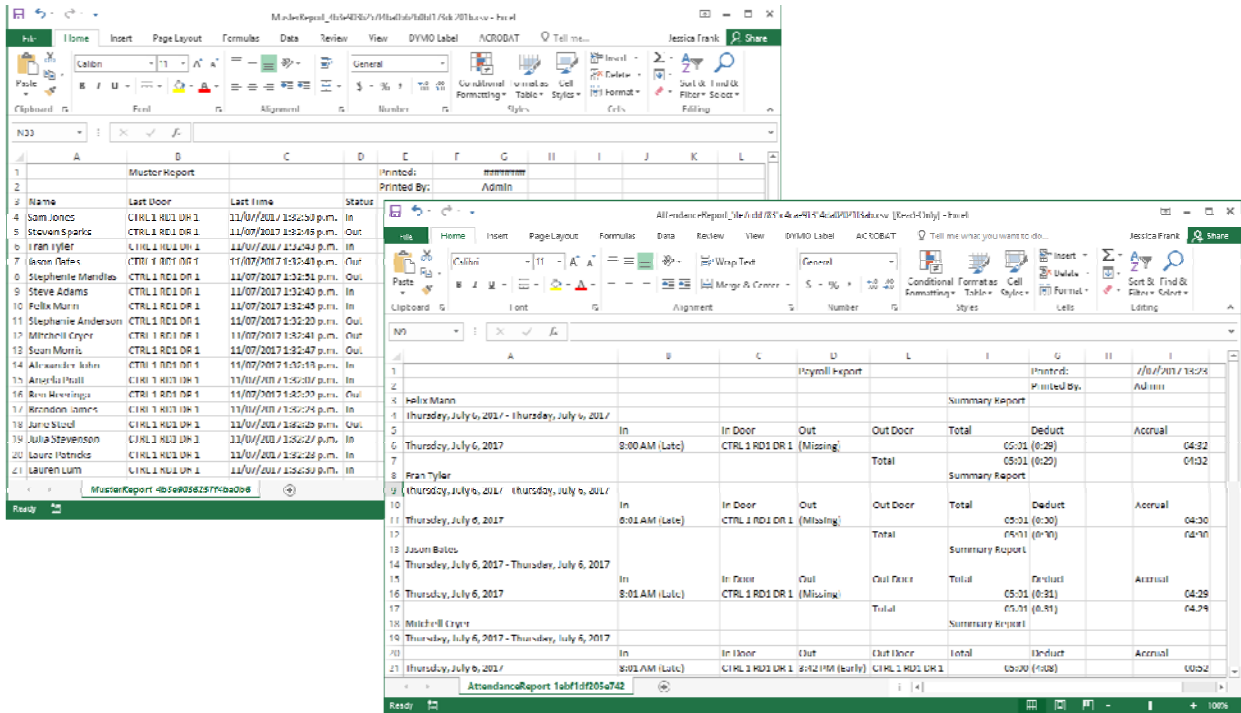
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Integrated Control Technology welcomes all feedback.

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