Periodically Exporting ProtegeGX Reports to a File

Application Note

CTeSecurity.

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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**.

Allowed Doors	User Fields	Public Holidays		File Export
General	Shift Times	Break Times	Users	Access Levels
General				î
Name		Payroll Export		
Name (Second Language		Payroll Export		
Record Group		<not set=""></not>		
User Source		User List		
User Record Group		<not set=""></not>		
Report Type		Shift First In Last Out		7
Unscheduled Days W	orked (excluding Publi	c Holidays)		
Public Holidays Work	ed			
Report Print Template		Detail		
Grace Time		00:00]
Normal Pay Code]
- Period				
Period		Previous Day		7
Starting		Friday		
Start Date		06/07/2017 12:00 a.m.		
End Date		08/07/2017 12:00 a.m.		
Prompt For Date				
Record History				!

2. Select the File Export tab.

Break Times	Henre	
	USEIS	Access Levels

- 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.

General Doors E-mail File Export		
* General		
Name	Muster Report	
Name (Second Language)	Muster Report	
Record Group	<not set=""></not>	
Configuration		
Period	1 hour	
Report Type	Detail	-
Refresh Rate	5 Minutes	
Record History		

2. Select the File Export tab.

General	Doors	E-mail	File Export
Genera	đ		
 Config 	uration		
 Record 	History		

- **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.

General Doors E-mail File Exp	port
File Export	
Enable File Export	
Report Format	csv
Time	01:00
Export Directory	C:\Users\jfrank\Documents\Reports\Muster Reports
Append Unique ID to Filename	
Export Time Is Periodic	
Days to Export	
Monday	
📕 Tuesday	
📕 Wednesday	
🔲 Thursday	
📒 Friday	

4. Click Save.

Viewing the Exported Reports

1. To view the exported reports, navigate to the location set for the Export Directory field.

General	Shift Times	Break Times	Users	Access Levels
Allowed Doors	User Fields	Public Holidays	E-mail	File Export
 File Export Enable File Export 				*
Report Format		CSV		
Time		21:00		
Export Directory		C:\Users\jfrank\Docur	ments\Reports\Payro	oll Export

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.

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	AttendanceReport_8e9c7780	404f446582d 06/07/2017 21:00	Microsoft Exc	el C 6 KE	3		
	AttendanceReport_8f4a03c2	236b415485d 05/07/2017 21:00	Microsoft Exc	el C 6 KE			
	AttendanceReport_26cf7c2co	d6c41b8b56 04/07/2017 21:00	Microsoft Exc	el C 6 KE	E)		
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	🕨 🔜 Desktop	MusterReport_e20265119co	:849ebb5c9a32	11/07/2017 16:30	Microsoft Excel C	2 KB	
		MusterReport_6e4f4645ed6	7487d93ae90f	11/07/2017 15:30	Microsoft Excel C	2 KB	
		MusterReport_305f4fa0586	2442abdf2a86	11/07/2017 14:30	Microsoft Excel C	2 KB	
		MusterReport_baececa00b:	394/e0b5/ltda	11/0//2017 13:30	Microsoft Excel C	2 KB	
		MusterReport_024137CC027	7841282866300	11/07/2017 12:30	Microsoft Excel C		
		MusterReport a70c7cb462	614cd1b5d271	11/07/2017 10:30	Microsoft Excel C	2 KB	
		MusterReport_b9f66991b65	51453f8fc3392a	11/07/2017 09:30	Microsoft Excel C	1 KB	
		MusterReport_ad7760b276	804526951dbf6	11/07/2017 08:30	Microsoft Excel C	1 KB	
	10 items	Y					

3. The information contained in the reports can then be imported into a third party system.

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