

CSV File Export Quick Reference Guide

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Introduction

This Quick Reference Guide will explain the setup and procedures required to export Maestro reports as a Comma Separated Value (CSV) file. This will allow the users to manipulate the data within a spreadsheet program as they see fit. Additionally, users may also choose to email the CSV fie based on their Maestro clerk code setup.

It is assumed that the reader is familiar with:

- Maestro User Interface
- Microsoft Windows Operating System
- Has completed the setup in Maestro to send email messages
 - To configure Maestro to send emails, please refer to the Email Integration Setup QRG.
 - Has completed the setup in Maestro for users to receive email messages
 - To configure clerks to receive emails, please refer to the Email/SMS Integration QRG

Setup

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Setup of Destination Folder

Create a Windows folder on the N:\ drive, or the Maestro mapped drive.

r ▶ 51 (\\fir\maestro) (N:) ▶		
Burn New folder		
Name	Date modified	Туре
🐌 Exe	11/23/2011 3:44 PM	File folder
Export	11/25/2011 2:52 PM	File folder
퉬 glexport	8/19/2011 8:58 PM	File folder
퉬 Groups	9/28/2011 5:25 PM	File folder
퉬 import	11/16/2011 4:11 PM	File folder
🐌 LOG	11/23/2011 5:00 PM	File folder

Setup in Maestro Global Maintenance | Reports | CSV Export Setup Maintenance

CSV Export Setup Maintenance [pat] - Northwind Hotel &		
<u>F</u> ile <u>R</u> ecord <u>W</u> indow <u>H</u> elp		
❷ ↘ #ð № ♀ ❷ ♀ ● ♀ ● ♥ ♥ ■		
Record Number 1		
FD Rep Address reports@maestropms.com		
CSV Save Dir N:\export		
Text Qualifier "		
Field Delimiter ,		
Date Separator -		
Date Format M		





Record Number	Automatically created when the users presses
	the F6 Create Button.
FD Rep Address	This is the email account from which the
	reports will be sent from. The email address
	does NOT need to be a valid email address.
CSV Save Dir	The directory to save the file. Input the path of
	the folder that was created in section 2.1
Text Qualifier	Input a double quotation mark (") in this field.
Field Delimiter	Input a comma (,) in this field
Date Separator	Input a forward slash (/) in this field.
Date Format	The date format chosen here will reflect on the
M MM/DD/YYYY	CSV file once exported.
N MM/DD/YY	
D DD/MM/YYYY	
Y YYYY/MM/DD	
A YYYYMMDD (NO SEPARATORS)	
B YYYYMM (NO SEPARATORS)	

Running the Report

Currently, the report export is only available for a limited number of reports such as:

- Shift Report
- Posting Audit Report
- Manager's Dashboard Report
- Revenue to Budget Pace Report
- Manager's Pace by Type Report

To export a report, go to the report menu. Run a report and click on the CSV button.

Room Revenue Summary [pat] -	Northwind Hotel & Conf Cen
<u>File R</u> ecord <u>W</u> indow <u>H</u> elp	
2 🔊 🚜 🦊 📮 🚱	6 🗜 🔇 🖓 🚭 😍 🎱 🔳
Start Reporting From	11/28/2011
Days to Forecast	30
Building (blank=ALL)	
Print	CSV Cancel

After clicking on the CSV button, the report is converted to a CSV file and is automatically saved to the destination folder created in Section 2.1.

The user is then given a choice whether to email a copy of the CSV file to the user's account.





Dialog	X	
Email the results?		
YES	NO	
Use ESC to Cancel		

If No is chosen, a prompt will display, informing the user where the CSV file is located.

Use ESC to Exit window	

If Yes is selected, the CSV file is automatically emailed to the user's email based on the setup of the clerk code. If an email address is not associated to the user's clerk code, the Report Email Collection screen will appear. Users can enter then enter their email address.

💠 Report Email Collection [pat] - Northwind Hotel & Conf		
<u>F</u> ile <u>R</u> ecord <u>H</u> elp		
2 > 3 1 2 2 3 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2		
Create		
Terminal	5016.NW0234.	
Line Email Address		
10 pliu@maestropms.com		
20		

If the user's email is associated with a clerk code, a dialogue box will prompt asking whether to send a copy of the report to others as well?

Dialog	X
Send the results to others as well?	
YES	NO
Use ESC to Cancel	

If Yes is selected, the Report Email Collection screen will appear again. Users can enter multiple emails to send the report to. Press F6 to create a new line and enter as many email addresses as needed. Press F4 to exit the screen when completed.

The CSV file will now be sent to the user's email and all the emails entered in the Report Email Collection screen.

