



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 file based on their Maestro clerk code setup.

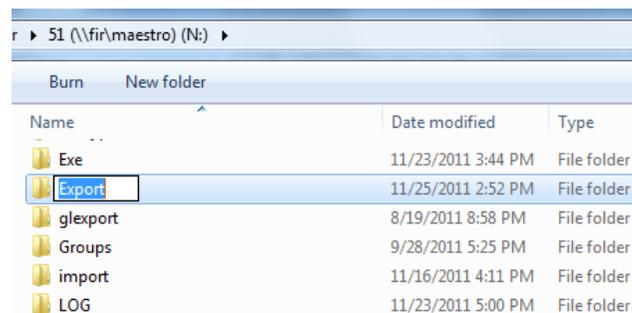
It is assumed that the reader is familiar with:

- 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

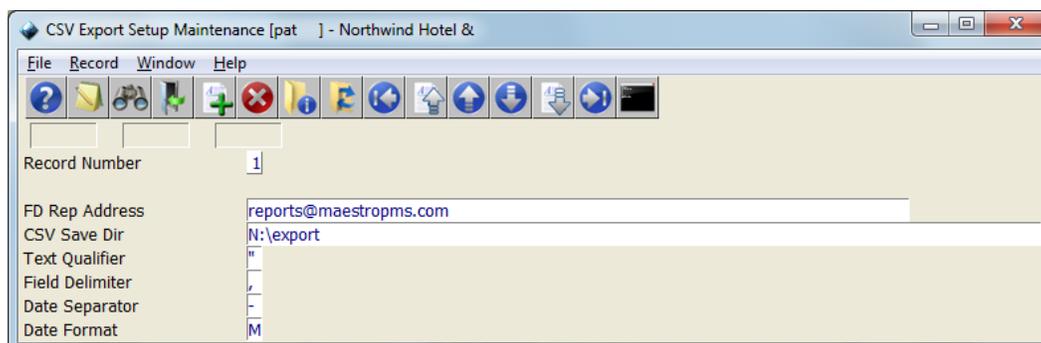
Setup of Destination Folder

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



Setup in Maestro

Global Maintenance | Reports | CSV Export Setup Maintenance



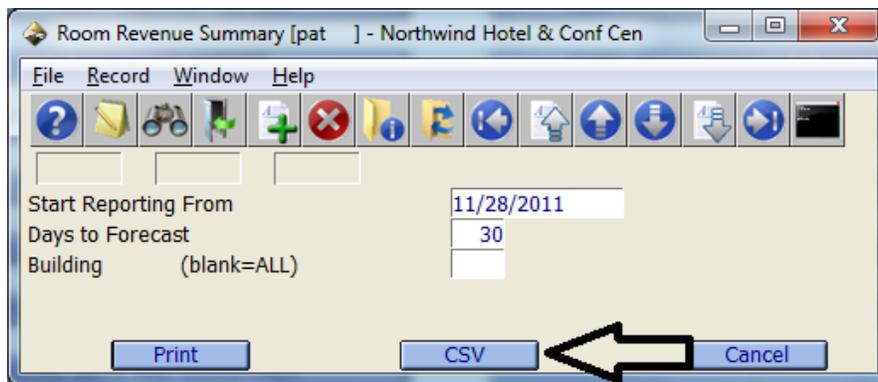
Record Number	Automatically created when the users presses the F6 Create Button.
FD Rep Address	This is the email account from which the reports will be sent from. The email address does NOT need to be a valid email address.
CSV Save Dir	The directory to save the file. Input the path of the folder that 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 CSV file once exported.

Running the Report

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

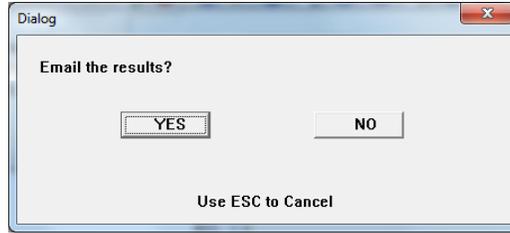
- Shift Report
- Posting Audit Report
- Manager’s Dashboard Report
- Revenue to Budget Pace Report
- Manager’s Pace by Type Report

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

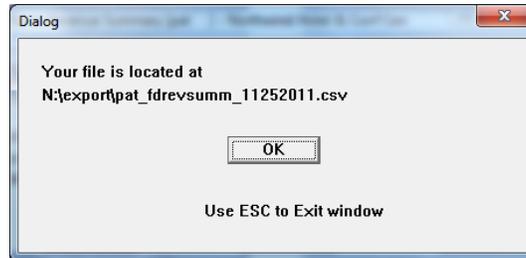


After clicking on the CSV button, the report is converted to a CSV file and is automatically saved to the destination folder created in Section 2.1.

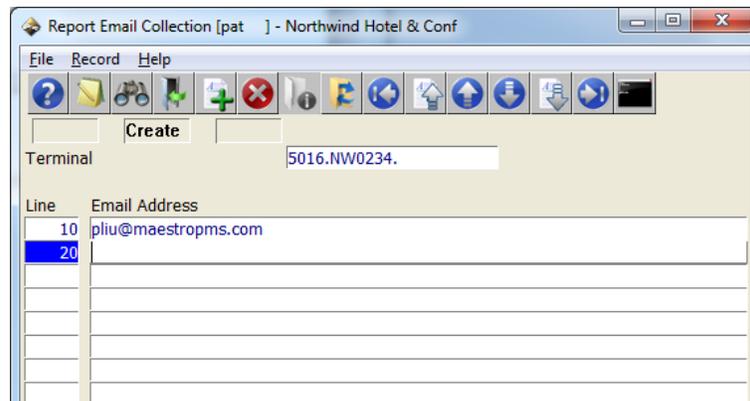
The user is then given a choice whether to email a copy of the CSV file to the user’s account.



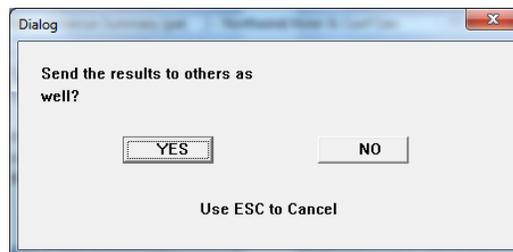
If No is chosen, a prompt will display, informing the user where the CSV file is located.



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.



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?



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.