

ServicePRO Export Attachments Utility User Guide

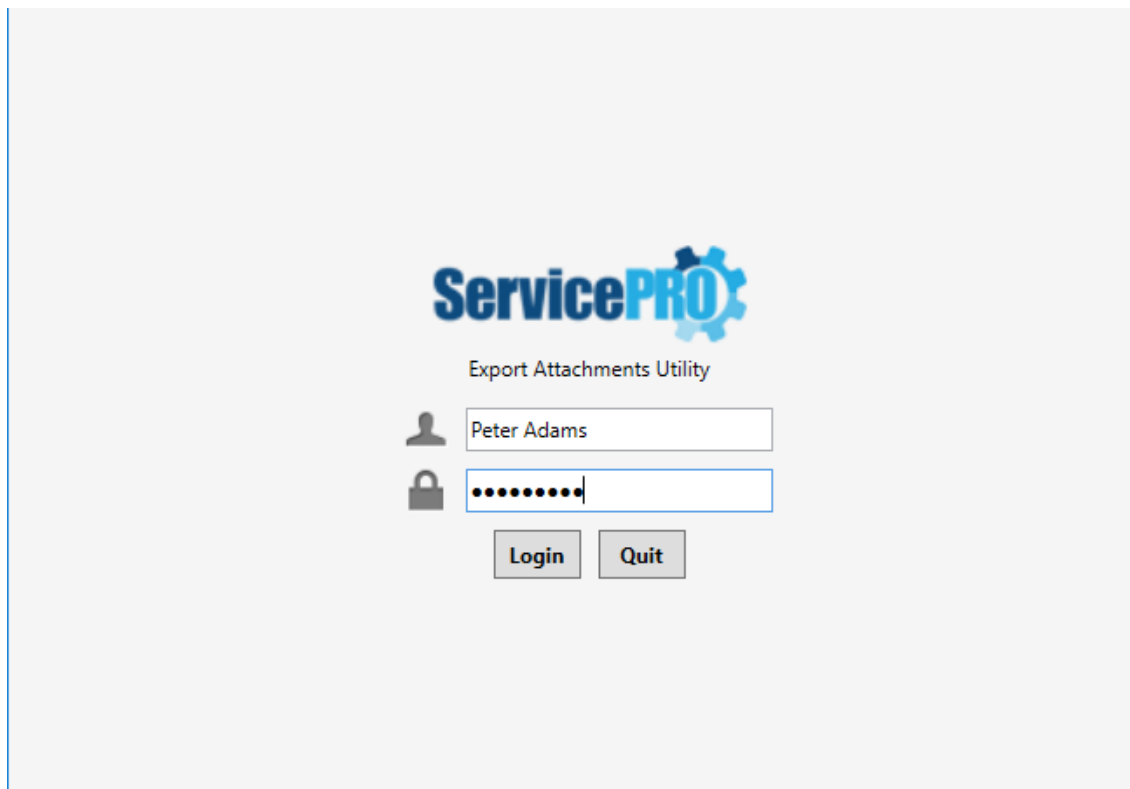
The ServicePRO export attachments utility can be used to export regular and encrypted ServicePRO attachments into a local windows folder. It can also be used to decrypt and reattach or re-encrypt attachments back to the respective request, object or delete attachments from the database once they are exported.

This guide outlines the export utility interface and its usage.

1. Login

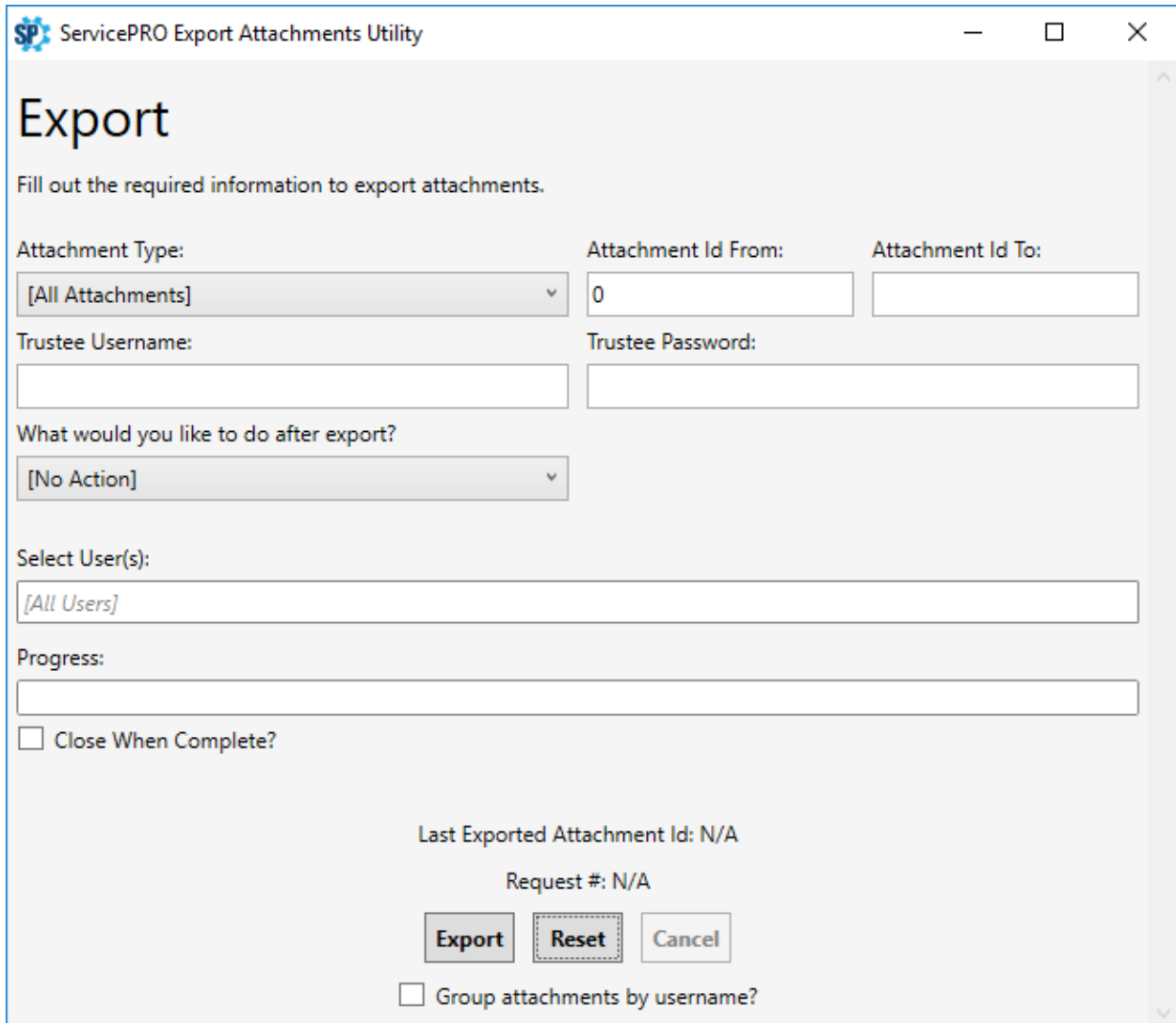
When first launched, the utility will present the user with a login form. In order to use the utility, the user must be existing in the ServicePRO database and have at least an 'Administrator' role assigned.

Note: *This user does not need to be a trustee to log into the Utility.*

A screenshot of the ServicePRO Export Attachments Utility login interface. The interface is centered on a light gray background. At the top, the ServicePRO logo is displayed. Below the logo, the text "Export Attachments Utility" is shown. There are two input fields: the first is for the username, containing "Peter Adams", and the second is for the password, represented by a series of dots. To the left of the password field is a lock icon. Below the input fields are two buttons: "Login" and "Quit".

2. Export Attachments Utility Interface

Once the user has successfully logged in, they will be presented with the main interface. From here on they can perform the attachment export operations.



The screenshot shows a window titled "ServicePRO Export Attachments Utility". The main heading is "Export". Below the heading is the instruction: "Fill out the required information to export attachments." The form contains the following fields and controls:

- Attachment Type:** A dropdown menu with "[All Attachments]" selected.
- Attachment Id From:** A text input field containing "0".
- Attachment Id To:** An empty text input field.
- Trustee Username:** An empty text input field.
- Trustee Password:** An empty text input field.
- What would you like to do after export?:** A dropdown menu with "[No Action]" selected.
- Select User(s):** A text input field containing "[All Users]".
- Progress:** An empty text input field.
- Close When Complete?**
- Summary text: "Last Exported Attachment Id: N/A" and "Request #: N/A".
- Buttons: "Export", "Reset", and "Cancel".
- Group attachments by username?**

2.1 Interface Overview

Attachment Type (Drop-down selection):

- Possible Options – **[All Attachments], Encrypted Attachments Only, Regular Attachments Only**
 - **All Attachments** – This option will export all ServicePRO attachments which are attached to service requests and other objects in the system. The exported attachments will include encrypted and no encrypted files, a trustee passphrase is needed before this export can be run.
 - **Encrypted Attachments Only** – Selecting this option will export all encrypted attachments only, attached to requests and other objects. A valid trustee passphrase is needed before this export can be run.
 - **Regular Attachments** – This option will only export regular, non-encrypted attachments attached to requests and other objects. A trustee passphrase is not needed for this export

Attachment Id From / Attachment Id To:

- The 'From' and 'To' field inputs specify a specific range of attachments to export based on the id value, directly relating to the **tblAttachment** table. A specific range of attachments can be exported if desired. Leave the 'To' value blank to export all attachments from the starting id. The From range will auto populate if a user clicks 'Cancel' button while attachment export is running.

Trustee Name / Trustee Password:

- If exporting encrypted attachments, a valid trustee user name and passphrase will need to be provided.

Note: *The trustee passphrase is not required if exporting only regular attachments, third option selected on Attachment Type drop down.*

What would you like to do after export? (Drop-down selection):

- Possible Options – **[No Action], Delete encrypted attachments and re-attach as regular attachments, Delete all attachments.**
 - **No Action** – If this option is selected, the attachments will be decrypted (if applicable) and downloaded to a local folder in the same directory as the export utility. The ServicePRO attachments on requests and other objects will not be modified in any way.
 - **Decrypt All Attachment(s) in ServicePRO** – Attachments will be decrypted (if applicable) and reattached as an unencrypted version of the file to the same request or other ServicePRO object. This option will not be available if the Regular Attachment Only option is selected from Attachment Type. All attachment files will be downloaded to a local folder if the 'Copy files to local drive' checkbox option is selected.
 - **Re-encrypt All Attachment(s) in ServicePRO** – Encrypted attachments will be decrypted (if applicable) and reattached as an unencrypted version of the file to the

same request or other ServicePRO object. This option will not be available if the Regular Attachment Only option is selected from Attachment Type. All attachment files will be downloaded to a local folder if the 'Copy files to local drive' checkbox is selected.

- **Delete All Attachment(s) in ServicePRO** - Attachments will be decrypted (if applicable) and downloaded to a local folder. After the attachment is downloaded, it will be permanently deleted from ServicePRO database.

Note: *Caution must be taken when running this option as the deletion of attachments from ServicePRO is irreversible.*

Select User(s):

- Allows to select individual users to only target files for export attached by that specified user(s). Begin by typing a user name, the list will display users in the ServicePRO database, make a selection. Multiple users can be added to the field, export utility will only download attachments attached by the specified user(s). If you want to download attachments by any user, leave the Select User(s) field blank.

Select User(s):

Susie Smith Alex Petersen

Alex Petersen

Close when complete (checkbox):

- When checked, the utility will exist once all export tasks are completed.

Progress status:

- During the attachment export, a progress bar will show the total progress. There will also be additional details showing the attachment Exporting # of # count. Last Exported Attachment id and the request # which is created in the ServicePRO Database for audit trail purposes.

Progress:

Close When Complete

Exporting 51/69 attachment(s).

Last Exported Attachment Id: 829

Request #: 100325

3. Export operation

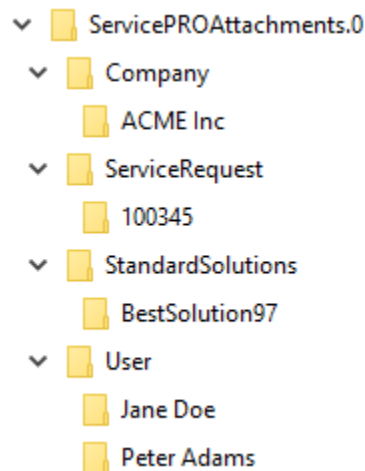
Export button:

- Click the export button to begin the attachment export based on the options selected. Attachments will be saved to the directory where the **ServicePRO.ExportAttachments.exe** resides; A **ServicePROAttachments.0** folder will be created, with numeric numbering appended to end of the folder after each new execution of export action. Before exporting, note the Grouping option checkbox to select what type of folder structure should be created, see below for details

Group attachments by username? Option:

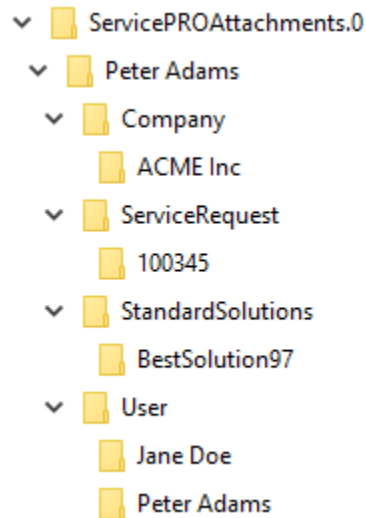
- If the 'Group attachments by username?' option is left unchecked, the exported attachments will be organized by the original object containing the attachment, such as Service Request, User or Company. Each object folder will place the attachment in the corresponding request number or object id/name.

ie.



- If the 'Group attachments by username?' option is checked, the exported attachments will be organized by folder name as user who originally attached the file. There will be sub folders indicating the object type or request number the exported files belong to, for service request and any other relevant ServicePRO objects. See example below:

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Reset button:

- Clicking the reset button will reset all form fields to default values. This is useful if an export operation was canceled while still running.

Cancel button:

- The cancel button will stop the current export of attachments. Note that if the export is cancelled, it will automatically populate the From id field for the last attachment it was processing, this makes it easier to resume the export operation by Clicking Export button again. To clear the settings, click Reset button.

4. Export via Command line arguments and Task Scheduler

The attachment export utility can also be run using command line arguments and configured as a scheduled windows task.

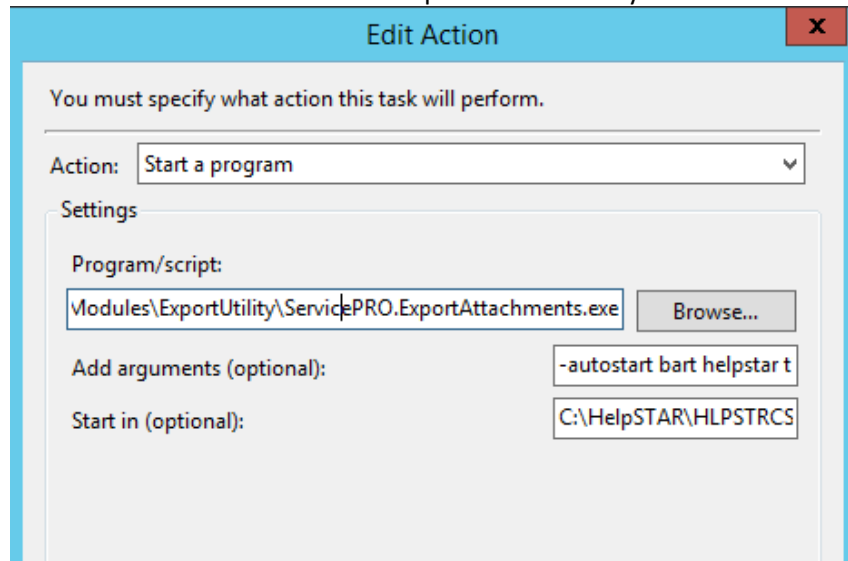
When the utility is run from the command line, it will by default export all attachments, regular and encrypted with [No Action] option selected.

The command line parameters are as follows. Note that `-autostart`, ServicePRO user name and password for login and trustee name and passphrase is required:

```
ServicePRO.ExportAttachments.exe -autostart username userpassword trusteeusername trusteeencryptionpassphrase
```

- When configuring the windows task, on the Actions tab, add a New... action.
- Set the action to Start a program
- Browse and select the ServicePRO.ExportAttachments.exe

- Add the command line arguments with correct user name and password and trustee name and passphrase. Make sure that the –autostart switch is specified as well.
- Fill in the Start in location value to point to the utility root folder.



When the scheduled task executes, the utility will run with the provided user credentials and the attachments will be decrypted and downloaded to a local folder in the same directory as the export utility. The ServicePRO attachments on requests and other objects will not be modified in any way.

5. ServicePRO Attachments Exported Request / Log file

- A log request will be created in the dispatch folder of ServicePRO database each time the export utility is run and a completion memo will be added once utility finishes export. It displays the count of the attachments that are skipped while exporting. The request will be called 'ServicePRO Attachments Exported (date/time)' This request can be used for auditing purposes and keep track of users running the export utility. The request will contain details such as the user which ran the utility, the settings used during export and which attachments were exported.

Workflow

- Forwarded to DISPATCH: Dispatch
- Email NONE Selected

Memo (Private)

ServicePRO attachment export utility was started by bart on Thursday, November 1, 2018 12:12:56 PM Eastern Standard Time. Here is the summary log of the export:

Machine Name	W2012R2EVALVM1
Folder	C:\HelpSTAR\HLPSTRCS\Modules\ExportAttachments\ServicePROAttachments.0
Windows User Name	Administrator
Export Settings	<ul style="list-style-type: none"> • Attachment Type: Regular Attachments Only • Selected User(s): [All Users] • Attachment Id Range: [All Attachments] • After Export Option: [No Action] • Trustee User Name: N/A

Workflow

Memo (Private)

ServicePRO attachments export completed successfully at May 30, 2023 3:58:30 PM GMT Standard Time and the following actions occurred in this session:

- 0 attachment(s) were exported.
- 45 attachment(s) were skipped.
- 0 attachment(s) were deleted.
- 0 attachment(s) were decrypted.
- 0 attachment(s) were re-encrypted.
- 1 attachment(s) could not be decrypted with the selected trustee user.

Unable to decrypt some attachment(s) with trustee user named 'sakthi'. For best results, use an older trustee user.

- A log file will be output to the Logs folder of the current location of the utility exe. This log will contain information on any errors encountered during export or if any attachments failed to export.
- A separate log file named 'SkippedFiles.txt' will be output to the 'ServicePRO Attachments' folder of the current location of the utility.exe. This 'SkippedFiles.txt' will contain information on any files that are skipped during the export, along with the reason for skipping.