

Creating a new Updated Fields Export to be sent via SFTP

- Contact your Account Manager or Application Support and tell them that you would like to start receiving exports via SFTP (secure FTP). An SFTP folder will be created for you on our secure server (if you are not already importing data via SFTP) and SFTP exports enabled across your community. Login information to access your SFTP folder will be provided.
- 2. Once you have received your login information you can then create your Updated Fields Export. Log in to the community
- 3. Click on Data
- 4. Click on Export Member Data
- 5. Click on Updated Fields and Schedule the report for a later date

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Export Member Data - Choose Type of Export @
What kind of report would you like to create?
Standard
Updated Fields
Run the report immediately
Schedule the report for a later date
Customize query
```

You can click on Customize Query if you want the export to pull a specific segment of data.

- 6. Click Next
- 7. Select the Identifiers for your report. These fields are static and will only show you what information exists in that field. The identifier fields will let you know whose records you are looking at in the report you receive. The primary key for your database is automatically included as an identifier

Export Member Data - Select Identifiers (Updated Fields) 🥯

Which Identifier Fields would you like to use?		
Load Saved Identifier Field List: Please Choose		
Click here to select fields	Selected:	
Address 2 (The Campain (Coll My Info) Address 2 (The Campaign for Overland State University) address 2 (The Campaign for Overland State University)	>>	Move Top
Affiliation to OSU (Edit My Info) Alphabet (Edit My Info) Alum ID (Edit My Info)	<<	Move Down
Alumni Status (Edit My Info) amount token (Edit My Info)	ř	Move Bottom



- 8. Click Next
- 9. Select the fields you want to see updates on. You will be moving the fields you want to include in your report from the left hand box to the right box. After the field name you will see a name in parenthesis, this name indicates which category that contains that particular field.

Please Choose	~			
Select additional data fiel	ds:			
Click here to select	fields 🔻			
Available Member Fields				Selected:
suffix (Home Contact)				Move Top
Last Name (Home Conta Maidan Name (Home Co	ict)		^	
First Name (Home Conta	intact)		>>	Move Up
Home Phone (Home Cor	ntact)			I
Address 1 (Home Contac	at)		<	< Move Dowr
Zip code (Home Contact	:t))			
Address 2 (Home Contac	, zt)		\sim	Move Botto
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gender (Home Contact) Click Next The next screen allow	s you to sort the fields	s in a particular orde	r if necessary.	
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Do not save this Export Fields List

O Save this Export Fields List

- 12. Click Next
- 13. The next page shows you a preview of what your export will look like. It only shows a few records that will actually be in the export. Click Next



14. You will need to enter a Name for the Export along with an optional description. Next you will enter a starting and Ending date and the frequency with which you want to receive the export.

Export Member Data - Schedule Export 🛞						
	Export Name 🛆	Description	Туре	Start Date	Frequency	End Date
	Version 1.0 Fields - All Identifier Fields	Will export all fields if any are updated	Updated - SFTP	7/8/2009	Daily	(none)
8				*	Daily 🔻	
1						

- 15. Once you have entered this information click on the disc icon that will save the report.
- 16. The next page will allow you to select who to send the email notification to as well as indicating that you want to receive your export via SFTP. First, click on Set File Retrieval via Secure FTP

Export Membe	er Data - Email Notification 🧕		
O The Scheduled	d Export was successfully saved.		
Set File Retriev	al via email notification with embedded link.		
	ccoover@imodules.com		
To Be Included:	* Delete		
Additional Emails:	Add		
From Name:	Creighton Coover *		
From Email:	support@imodules.com		
Subject:	Scheduled Export Test is ready.		
Body:	*		
	A 🔄 🌄 🖟 🐘 🕞 👘 🕞 🤊 - 🤍 - 📓 💷 - 🖉 😒 🍔 🕲 - 🔤		
	B Z U 新春春春 日日 課 課 日 × × ★ 🛛 請 🔘		
	Font Name 🔹 Sizı 🔹 🗛 👻 📎 👻 Custom Links 💌 Paragraph Sty 💌 💕 💌		
	The Test scheduled export for Banner Model is ready to be retrieved. ##File Link## to retrieve the file.		
	Or alternately, paste the URL shown below into your internet browser's address to retrieve the file: ##File URL##		
	Best regards,		
/	iMODULES Support support@imodules.com		
	/ <> Q		
Set File Retrieval via Secure FTP			
Close Save	e Email Notification		



17. Select the email addresses of those who should receive a notification that the export has been sent.

Set File Retrieval via email notification with embedded link.						
Set File Retrieval via Secure FTP						
File Naming Convention The file naming convention for SFTP Export/Reports is [Export/Report Name]_[Date_Processed].						
File Name for the first scheduled run: Business Ifo Report_20081119						
Subsequent scheduled occurrences will differ by date.						
Email Confirmation If you would like to receive an email confirming that the Export/Report has run successfully, enter your address(es) below.						
Administrators that should receive the email:						
ccoover@imodules.com Remove						
Close Save Email Notification						

18. Click on Save Email Notification. Your export has now been created.

In order to access your Export you would click on Forms then Scheduled Reports. OR click on Members then Edit Members. Then you will see a tab named Scheduled Reports which you will need to click on to make any edits to your Scheduled Export.

Encompass - Viewing: Creighton Coover 🚔 Find Member Record 🕖						
Profile Notes Forms	Events Campaigns Tasks Communications Tra	acking				
Manage Forms Forms H	listory Saved Reports Scheduled Reports					
Report Name 🛆 Description Type Start Date Frequency End Date						
🖗 🛃 🥒 🗹 🤤	Test	Just a text export.	Updated - SFTP	7/22/2009	Daily	(none)
🖗 🔯 🥒 🖾 🥥	Version 1.0 Fields - All Identifier Fields	Will export all fields if any are updated	Updated - SFTP	7/8/2009	Daily	(none)
1						

There are 5 icons listed to the left of your report.

The cylindrical icon allows you to modify an existing query for this report.

The spreadsheet icon allows you to change the fields including in your report.

The pencil icon allows you to change the frequency you receive the report.

The envelope icon allows you to change who receives email notifications for the report.

The minus icon would delete the report that has been created.



Accessing your Export File(s)

- 19. The export file(s) will be located in the folder called Scheduled_Exports
 - This folder is created after the export report runs for the first time

Filename	Filetype	Last modified
Image: Second	File folder File folder	1/9/2015 1:58:00 AM 10/16/2014 4:06:00 PM

Last Updated: Jan 2015