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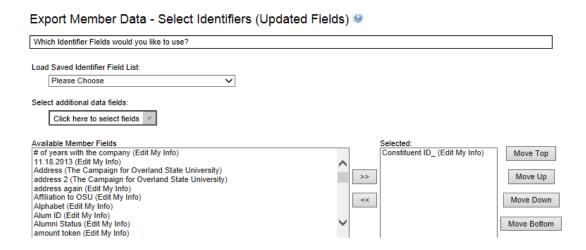
Creating a new Updated Fields Export to be sent via SFTP

- 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



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

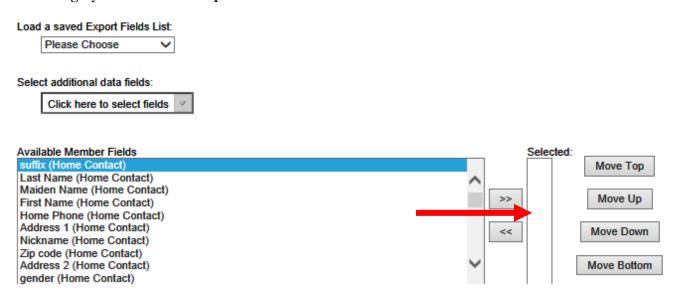
- 6. Click Next
- 7. Select the Identifiers for your report. These fields are static and will only show you what information exists in that field. The identifier fields will let you know whose records you are looking at in the report you receive. The primary key for your database is automatically included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



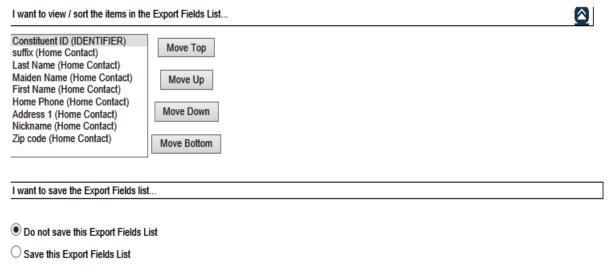


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- 8. Click Next
- 9. Select the fields you want to see updates on. You will be moving the fields you want to include in your report from the left hand box to the right box. After the field name you will see a name in parenthesis, this name indicates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



- 10. Click Next
- 11. The next screen allows you to sort the fields in a particular order if necessary.



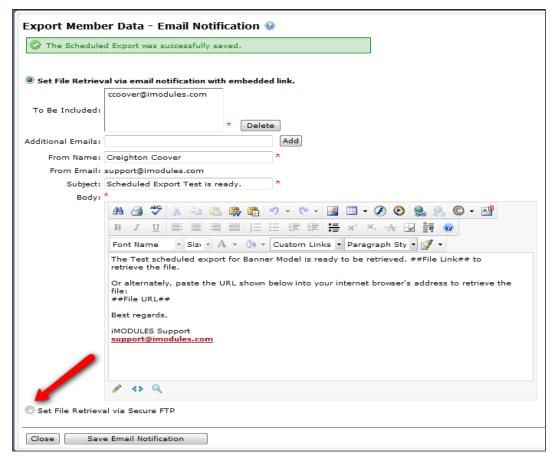
- 12. Click Next
- 13. The next page shows you a preview of what your export will look like. It only shows a few records that will actually be in the export. Click Next

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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.

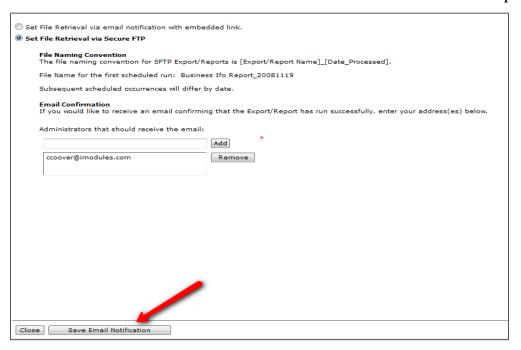


- 15. Once you have entered this information click on the disc icon that will save the report.
- 16. The next page will allow you to select who to send the email notification to as well as indicating that you want to receive your export via SFTP. First, click on Set File Retrieval via Secure FTP



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



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.



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



Last Updated: Jan 2015

