

## Creating a new Updated Fields Export to be sent via SFTP

1. 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](#)

**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

Select additional data fields:  
Click here to select fields

**Available Member Fields**

- # of years with the company (Edit My Info)
- 11.18.2013 (Edit My Info)
- Address (The Campaign for Overland State University)
- address 2 (The Campaign for Overland State University)
- address again (Edit My Info)
- Affiliation to OSU (Edit My Info)
- Alphabet (Edit My Info)
- Alum ID (Edit My Info)
- Alumni Status (Edit My Info)
- amount token (Edit My Info)

**Selected:**

- Constituent ID\_ (Edit My Info)

Move Top  
Move Up  
Move Down  
Move Bottom



# IMODULES

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.

Load a saved Export Fields List:

Please Choose ▾

Select additional data fields:


Click here to select fields ▾

Available Member Fields

suffix (Home Contact)  
Last Name (Home Contact)  
Maiden Name (Home Contact)  
First Name (Home Contact)  
Home Phone (Home Contact)  
Address 1 (Home Contact)  
Nickname (Home Contact)  
Zip code (Home Contact)  
Address 2 (Home Contact)  
gender (Home Contact)

Selected:

Move Top  
Move Up  
Move Down  
Move Bottom



10. Click [Next](#)
11. The next screen allows you to sort the fields in a particular order if necessary.

I want to view / sort the items in the Export Fields List...



Constituent ID (IDENTIFIER)	Move Top
suffix (Home Contact)	
Last Name (Home Contact)	Move Up
Maiden Name (Home Contact)	
First Name (Home Contact)	
Home Phone (Home Contact)	Move Down
Address 1 (Home Contact)	
Nickname (Home Contact)	
Zip code (Home Contact)	Move Bottom

I want to save the Export Fields list...

- Do not save this Export Fields List  
 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 Name	Description	Type	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)

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 Member Data - Email Notification**

The Scheduled Export was successfully saved.

Set File Retrieval via email notification with embedded link.

To Be Included:

Additional Emails:

From Name:

From Email:

Subject:

Body:

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](mailto:support@imodules.com)

Set File Retrieval via Secure FTP

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



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 | Tracking

Manage Forms | Forms History | 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.



# IMODULES

## 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
..		
scheduled_exports	File folder	1/9/2015 1:58:00 AM
config	File folder	10/16/2014 4:06:00 PM

Last Updated: Jan 2015

