Scheduling Exports (System Admin only).

Exports can also be scheduled to run on a periodic basis to extract the report to a downloadable file for both data and files from the onboardee record. To run an Export via a schedule select the Automatic Schedule option in the Filters section of Export when creating or editing the Export.

Automatic Schedule	
Filters	
Name	
Onboarde	Search for an onboardee
Statu	×
Automatic Schedu	
Schedule Owner	×
Frequency	×
First Run Date	
All Companie	

Heading	Description				
Schedule Owner	This is the assigned owner of the Export who will receive the email notification when a schedule has run and a link to access the file. Please note that Schedule Owners will only see data that they have permission to see.				
FrequencySchedules can be set to run Weekly, Monthly, or on a Custom schedule from First Run Date					
Cycle Range (Custom only)	This sets the number of days between Exports for Custom Frequency schedules. E.g 14 days for a fortnightly report				
First Run Date	The date that you want the first scheduled export to run on, all subsequent reports will run as per the schedule from this date. The first Export will include data for the selected frequency prior to this date				
All Companies	Account Level Exports only – selected by default, deselecting allows the user to select which company(ies) to run the Export for				

Click "Save" to save all of the Export Schedule settings.



Previewing Scheduled Exports.

Select the export you wish to preview from the list in the main Export screen.

Bulk operations > Expor	ts > Test Schedule Export Ac30days Docs - [Account	Level]	
¢ Back			
Onboardee	Search for an onboardee		~
Status	Offer completed by HR		~
Include Documents	\checkmark		
Automatic Schedule	\checkmark		
Schedule Owner	Simon Connell - Admin Demo		
Schedule Frequency	Custom		~
Cycle Range	30		days
First Run Date	28/06/2021		
Last Run Date			
Next Run Date	28/07/2021		
	2 Preview Report		

Note: Using the Preview or Export buttons from this screen will run the Export for data from the last scheduled date to the current point in time but not change the schedule itself.



The Preview button will run the Export and display the results in the window below the settings.

🛓 Export

The Export button will run the Export and download the results to a .CSV file.

Retrieving Scheduled Exports.

The Schedule Owner will receive an automatic email from the system when the Schedule has run. This will include a limited time access link to retrieve the file.



The user will need to log in to Webonboarding in order to access the file. Once this has been done the system will automatically begin downloading the folder with the information.

The file will include a folder called 'report' containing a .CSV file with the Export information and, if documents were included, a folder called 'documents'.

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 → * ↑ 	> This	PC > Dow	nloads > Test_Sched	ule_Export_Ac1days_2021-08	-18_1901_20	~	Ō	Search Test	_Schedule_Export_Ac1	days_2021-08-18_1901
 A Quick access 		Name	^	Туре	Compressed size	Pa	assword	Size	Ratio	Date modified
Quick access	*	📙 docun	nents	File folder						18/08/2021 19:01
Desktop	*	report		File folder						18/08/2021 19:01
Documents	*									
Pictures	*									
		<								
2 items 1 item sele										833

In the ZIP file each onboardee will have their own folder with their documents included within it.

l 2 i → l File Home	Share Viev	Extract W Compressed Folder Tools	documents					>
- → · ↑ 📙	Oownloads	> Test_Schedule_Export_Ac1da	ays_2021-08-18_1901_20 >	documents	v Ö V	Search docu	ments	
Quick access Quick access Desktop Downloads Documents Pictures	Gi	e ^ ob_Smith ine_Smith ennifer_Hammond oderick_Henry	Type File folder File folder File folder File folder	Compressed size	Password	Size	Ratio	Date modified 18/08/2021 19:01 18/08/2021 19:01 18/08/2021 19:01 18/08/2021 19:01
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