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.
Frequency	Schedules can be set to run Weekly, Monthly, or on a Custom schedule from the 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.

않 Bulk operations > Expor	ts > Test Schedule Export Ac30days Docs - [Account	Level]	
K 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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File Home Shar	e View	Compressed Folder Tools							~ 🕐
A Search Test, Schedule_Export_Ac1days_2021-08-18_1901_20 V O Search Test, Schedule_Export_Ac1days_2021-08-18_1901_20 V Search Test, Schedule_Export_Ac1days_2021-08-18_1901_20 V O Search Test, Schedule_Export_Ac1days_2021-08-18_1901_20 V Search Test, Schedule_Export_Ac1days_2021-08-18_1901_20 Search Test, S					1901				
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Downloads									
Documents *									
Pictures y									
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2 items 1 item selected									

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

I Image: Imag	Extract re View Compressed Folder Tools	documents	- • × ~ ?
Aller Poome Share ← → ↑ ▲ C Desktop # ↓ Downloads # ☑ Documents # ☑ Pictures #	view view Compressed Folder House Downloads > Test_Schedule_Export_AcIdays Name Bob_Smith Gina_Smith Jennifer_Hammond Roderick_Henry	rs_2021-08-18_1901_20 > documents v 0 Password Size Ratio File folder File folder File folder File folder File folder File folder	Date modified 18/08/2021 19:01 18/08/2021 19:01 18/08/2021 19:01 18/08/2021 19:01
4 items	<		>