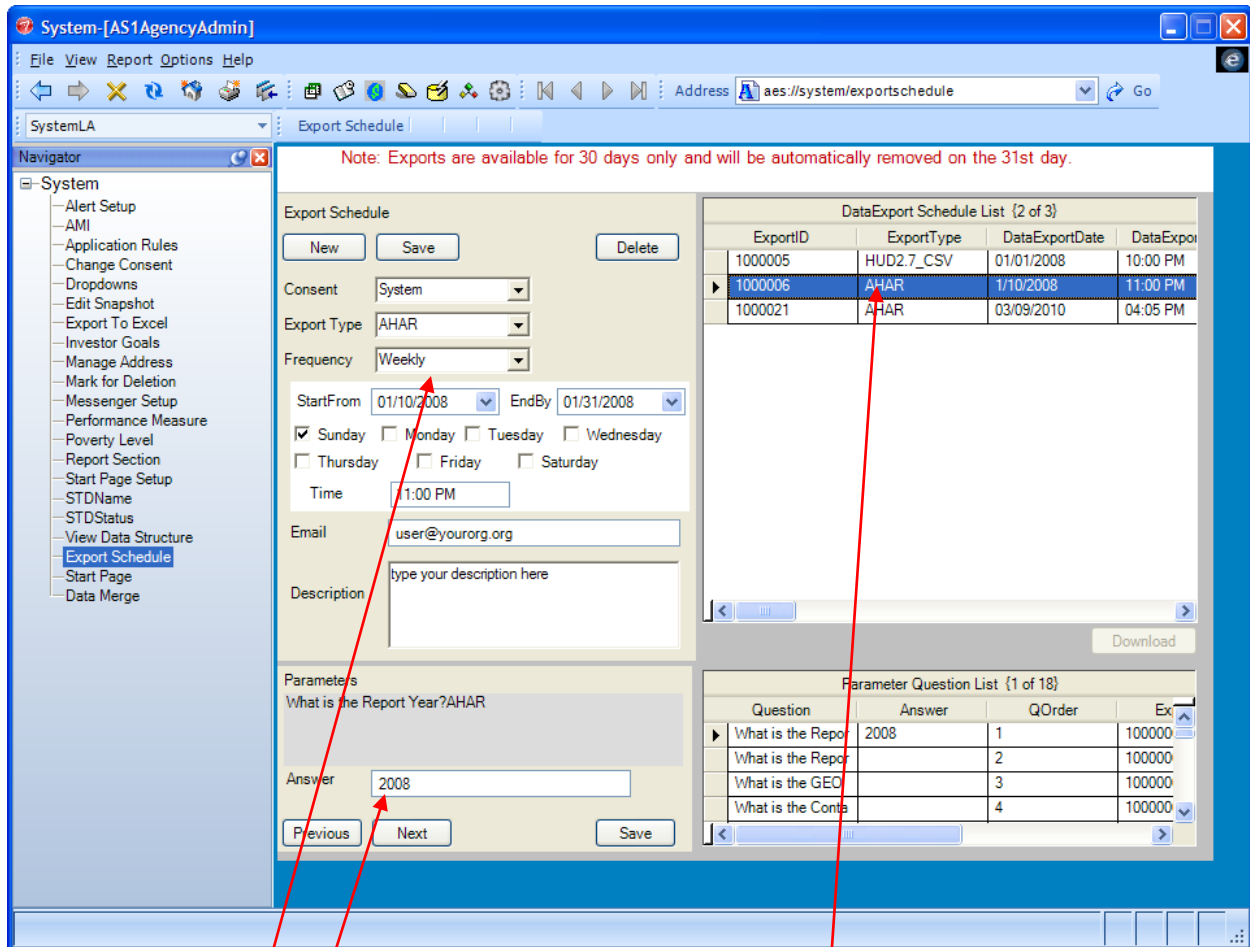


# Export Schedule Setup Page

Use this page to schedule one-time or ongoing tasks, such as running specific reports at certain times during the week or month, such as the HUD2.7 report or AHAR report.



## *Navigating the Win Service Schedule Set up Page*

- Create new Export/job schedules in the top section
- All existing Schedules are displayed in the DATA EXPORT SCHEDULE LIST GRID
- Set up the Parameters of the selected Export in the bottom sections

### Create a new Schedule Item

- 1 Click the NEW button at the top of the page
- 2 Select Consent level
  - a This determines who will have access to this export record
- 3 Select Schedule Type
  - a One time
  - b Weekly
  - c Monthly
- 4 Enter scheduling information
  - a Time allowed is 5 pm – 5 am EST and/or weekends, a message will appear if a time is selected that is not allowed
  - b Fields in scheduling area will change according to Schedule Type selection
    - i) One Time: enter Day and time
    - ii) Weekly: select Start and End Dates, check day of week to run and enter time
    - iii) Monthly: select Start and End Dates, check for first day or last day and enter time
- 5 Enter Email address –email will be sent to this address when results are ready for downloading
- 6 Enter Description of Schedule Item
- 7 Click SAVE button
  - a Use DELETE to remove unwanted Export record

Scheduled item will appear in DATA EXPORT SCHEDULE LIST GRID and Parameters will be displayed in PARAMETERS QUESTION LIST GRID in bottom section. The number of items in the DATA EXPORT SCHEDULE LIST GRID is determined by the schedule created; One Time will create one record, other choices will create the number of records determined by the start & end dates.

➤ Reports must be scheduled during non- business hours (5 pm – 5 am EST and weekends), so that normal computing use is not affected

➤ HMIS AHAR XML exports may be run during business hours, including holidays, but CSV exports and HUD XML remain non-business hours only

➤ Export files will be available for 30 days only and will be automatically removed on the 31<sup>st</sup> day

### Set Parameters

Make sure correct item is selected in DATA EXPORT SCHEDULE LIST GRID; parameters will appear in Grid below.

- 1 Read question in shaded area
  - 2 Enter answer to first question in Answer field
    - a Some answers may only allow certain characters to be entered, i.e. dates or times
    - b All questions must be answered unless it is indicated as optional
  - 3 Click NEXT to progress to next question
    - a User PREVIOUS to return to last question
  - 4 Answer all questions
  - 5 When finished, click SAVE
- Export job is now set up and ready to be run on dates selected.

### Download File

After the job has run, the resulting file will be ready to download.

- 1 Select Export job in DATA EXPORT SCHEDULE LIST GRID
- 1 Click DOWNLOAD FILE button
- 2 In popup window, navigate to location to save file and enter name for file
  - a The file can have any name, but must have rar as the extension because it is a compressed file
- 3 Click SAVE

The uncompressed file will consist of one or more files; seven files for CSV, one file for XML.

The file will be available for download for 30 days only.