LearnConnect

## HOW TO EXPORT REPORTS (VIA FTP & EMAIL)

Hello and welcome to Learn Connect Help. This user guide explains how to export reports from LearnConnect via email or File Transfer Protocol (FTP).

Once you have created and saved your LearnConnect report (refer to "**Create Reports**" Quick Reference Guide in the Help Centre) you have the option to schedule this report so that it is sent automatically to an email address, or exported to an FTP folder.

Please note: to enable exporting reports via FTP, you will first need to provide Learning Seat with your organisation's Public IP address. This can be done by contacting the IT Support Desk at support@learningseat.com.

Let's begin by accessing the "**Customisable Reports**" tab in the "**Reports**" menu.

You'll then be taken to the "**Customisable Reports**" screen, where you can view any reports that have been saved.
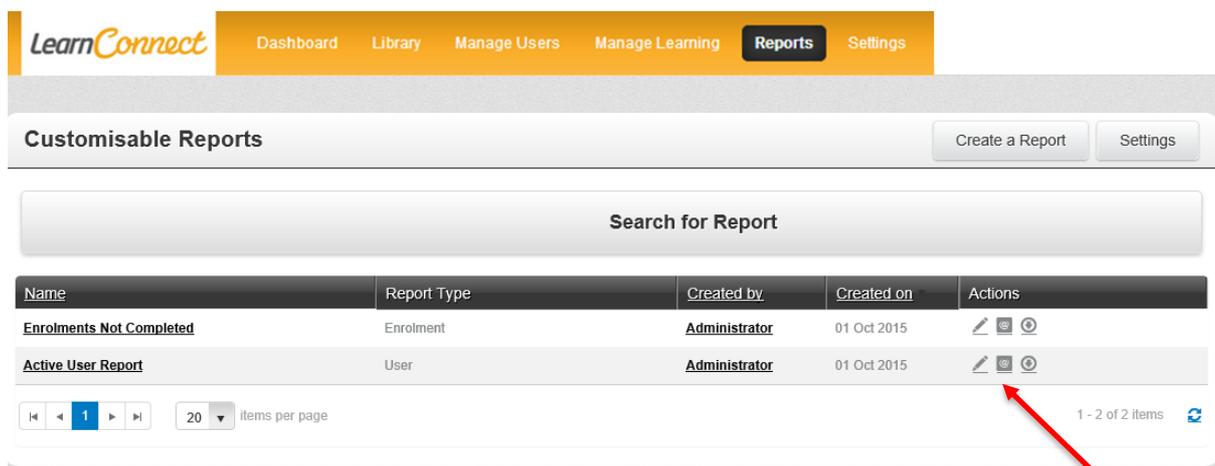
From this page, you have the option to schedule a report to be sent to Email or File (FTP).

In this example, let's schedule a saved report to be sent automatically to an email address. To do this, under the "**Actions**" column, select the [icon] icon. If you hover your mouse over the icon, it will show "**Schedule to Email**".

You will then be taken to the "**Schedule a Job**" page. The term "**Job**" refers to each instance you schedule a report. Scheduling a report (via email or FTP) creates a "**Job**".

Now you need to enter the Job details to determine where, when and how often the report should be sent.

- "**Enabled**" – Check this tick box to make the Job active. To disable the Job, check the box again (so it is not ticked).
- "**Job Type**" – This indicates whether the Job is exporting the report to an FTP folder or an email address. In this example, "**Email custom report**" indicates the report will be sent to an email address.
- "**Custom Report**" – Here you can select the relevant report from the list of saved reports.
- "**Email Address**" – Use this to enter the email address(es) you wish to send the report to (this field may already be populated if your email address is associated with your user profile).
- *Hint: You can include multiple email addresses by separating them with a comma.*
- "**File Format**" — This determines the file format of the report to be exported. The options are '.csv', '.xls' and '.pdf'.
- "**Run From**" and "**Run To**" – Use this to set when the Job should begin (e.g. when do you want the report to start being sent) and when the Job should finish (e.g. when do you want the reports to stop being sent).
- "**Schedule Type**" — This determines if the report should be run "**At scheduled times**" or "**At regular interval**". Let's look at this option in a little more detail, because depending on what Schedule Type you select, the options will change.

If you select the Schedule Type "**At a regular interval**" this means the report will be sent based on a scheduled timeframe.

Schedule Type *:	At a regular interval
Run Indefinitely:	✔
Run Count *:	
Unit *:	Hour
Frequency *:	1

Save Scheduled Job   Cancel

- "**Run Count**" — This determines how long the Job should run for. For example, if you make the Run Count '4', the Job will run 4 times before it stops. If you select "**Run Indefinitely**" the schedule will run indefinitely (until you chose to disable the Job).
- "**Unit**" — Here you can select how often the report should run for the nominated period (Weeks, Days, Hours or Minutes).
- "**Frequency**" – This is the amount of times the report should run for the nominated unit. For example, if you choose the "**Unit**" to be in Weeks and select the frequency of '1', the report will run every week. A frequency of '2' means the report would run every second week.

If you select the Schedule Type "**At scheduled times**", the report will be sent at a specific time of day.

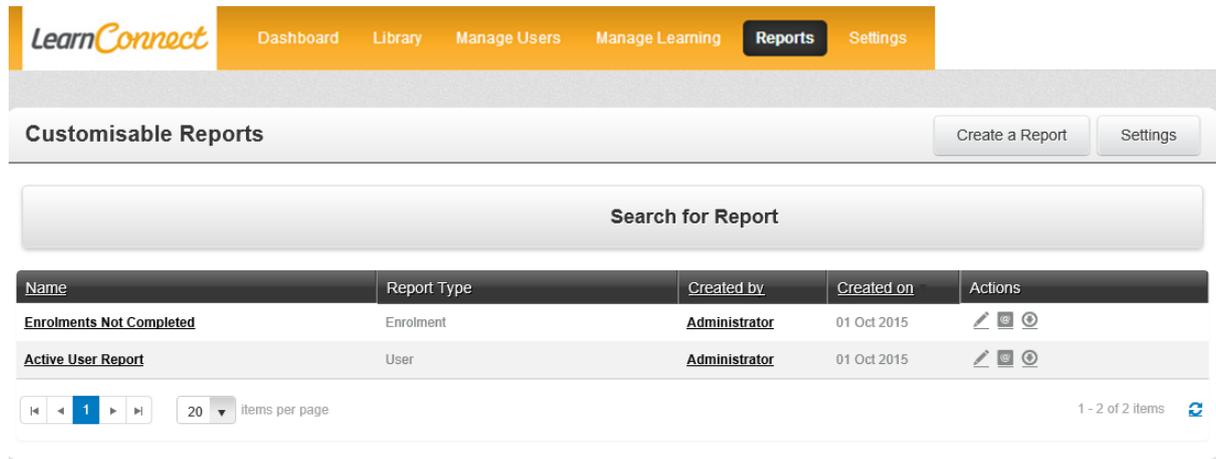| Schedule Type *:	At scheduled times
Time Zone:	(UTC+10:00) Canberra, Melbourne, Sydney
Time Of Day *:	12:00 AM
Frequency *:	Every Day
Day Of Week:	Sunday

Save Scheduled Job   Cancel

- "**Time Zone**" and "**Time of Day**" — Use this to set the applicable time zone and time of day to send the report.
- "**Frequency**" – This determines how often the report will run (e.g. Every Day, Mon – Fri, Mon – Sat, Specific Day).
- "**Day of the week**" – This option only appears if the frequency "Specific Day" is chosen.

Once you have selected the appropriate settings, select "**Save Scheduled Job**" to save your configuration.

Creating a Job where the report is sent to an FTP file is very simliar to scheduling a Job via email. Go to the "**Saved Reports**" page and this time select the ⊕ icon in the "**Actions**" column (if you hover your mouse over the icon, it will show "**Schedule to File**").

IMPORTANT: You must first provide Learning Seat (support@learningseat.com) with your organisation's Public IP address for the Job to be implemented successfully. Learning Seat has an automated process that runs over night to pick up all these generated reports from the server and place them in your nominated FTP folder.

The reports generated by LearnConnect will run as per the scheduled times set above and time stamped – the report file name will be in the format "**Report_Name_YYYYMMDD_HHMMSS**"(e.g. "**Compliance_Report_20140115_042735.xlsx**").

Canceling a Job

If you want to cancel a Job, locate the saved report and select "**Schedule to Email**" or "**Schedule to FTP**" as appropriate. On the "**Schedule a Job**" page, uncheck the "**Enabled**" tick box so it is not selected and this will cancel the Job.

And that's how to export reports via Email or FTP.