

Schedule an Export

Quick Start Guide

Document Details

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System Requirements

- CES Version 10.00.00.xx or higher

Overview

Exports can be scheduled to run on a daily, weekly, or monthly basis, freeing super users from manually extracting data every time. These exports can generate flat files that are exported to a particular file directory via the Crunchtime Data Pump (CDP), or JSON files that are passed to another destination system via APIs. This guide will show you how to schedule an export to generate at a particular time and frequency.



Download the latest version of this document here:

<https://links.crunchtime.com/EMQS-ScheduleAnExport>

... or scan the QR code to the left.

Related User Group Permissions

Screen Name	Control Name	Description
Event Scheduling	View	Access the screen in view-only mode.
Event Scheduling	Add/Delete/Save	Add, delete, or update a scheduled event.

Related Documentation

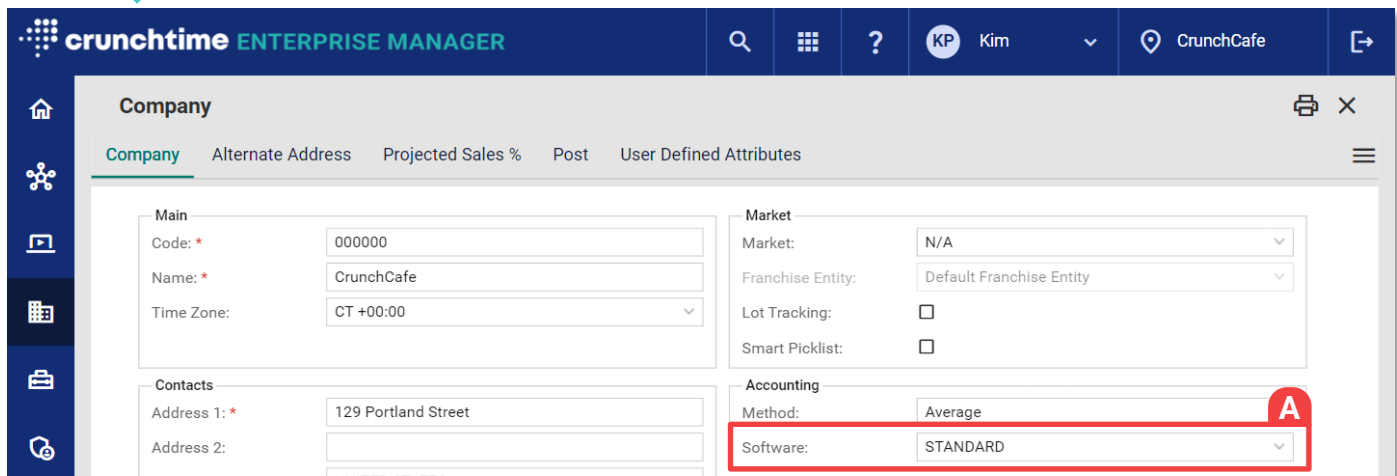
- Standard Interface Guide: <https://links.crunchtime.com/LatestStandardInterfaceGuide>

Schedule an Export

Prerequisite Requirements

Accounting Software

Enterprise Manager > Company: Company



Company

Company | Alternate Address | Projected Sales % | Post | User Defined Attributes

Main

Code: * 000000

Name: * CrunchCafe

Time Zone: CT +00:00

Market

Market: N/A

Franchise Entity: Default Franchise Entity

Lot Tracking: ☐

Smart Picklist: ☐

Contacts

Address 1: * 129 Portland Street

Address 2:

Accounting

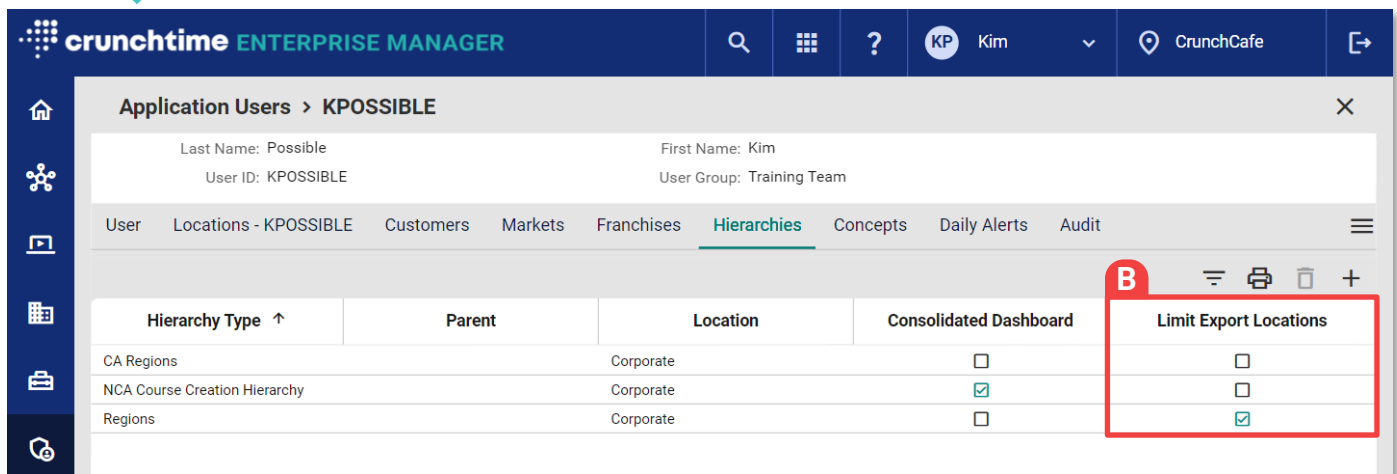
Method: Average

Software: STANDARD

A The Company's *Accounting Software* must be set to either *STANDARD* or *Epicor Platinum*. If a different option is selected the Event Scheduling menu option will **not** be visible.

Limit Export Locations

Enterprise Manager > Security: Application Users > Hierarchies



Application Users > KPOSSIBLE

Last Name: Possible | First Name: Kim

User ID: KPOSSIBLE | User Group: Training Team

User | Locations - KPOSSIBLE | Customers | Markets | Franchises | **Hierarchies** | Concepts | Daily Alerts | Audit

Hierarchy Type ↑	Parent	Location	Consolidated Dashboard	Limit Export Locations
CA Regions		Corporate	☐	☐
NCA Course Creation Hierarchy		Corporate	☒	☐
Regions		Corporate	☐	☒

B Users must have a *Limit Export Locations* hierarchy selected in their Application User profile. This selection determines which locations and hierarchy groupings are visible to the user when creating and updating Scheduled Events. Only **one** of the user's linked hierarchies can be selected for this setting. If a Limit Export Locations hierarchy is not selected, the user will receive an error message when attempting to open the Event Scheduling page.

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Schedule an Export

Create a New Event

Event Details

Enterprise Manager > Interfaces: Event Scheduling > Add Event

crunchtime ENTERPRISE MANAGER

Event Scheduling > Add Event

Detail Exclude Locations

Event Details

Event Name: * Payroll

Event Type: * Payroll (Payroll)

Location(s): * Corporate

CDP User: MiguelOrtiz

Active ☒

1. From the Event Scheduling screen, select the *Plus* (Add) icon.

2 Add the Event Details:

- Enter a unique *Event Name*.
- From the *Event Type* menu, select the export to schedule. This dropdown menu contains all standard exports and custom exports created from the export mapping screen.



Tip: You can find details on all standard exports and custom export options in the Standard Interface Guide. Follow this link to learn more: <https://links.crunchtime.com/LatestStandardInterfaceGuide>

- Select the *Locations* to include in this export. You can choose one specific location or hierarchy group containing multiple locations.
Note: The locations and hierarchies are determined by the user's Limit Export Locations setting.
- Optionally, select a *CDP User* to have the export sent directly to a local folder. The folder is determined by the export location listed in the selected user's cdp.ini file.



Note: Users will have the ability to extract the export from Enterprise Manager regardless of if the files were automatically exported via CDP or API.

- Optionally, check the *Active* box. You can choose to leave the scheduled event inactive and activate at a later date.

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Schedule an Export

Create a New Event (Continued)

Event Schedule

Enterprise Manager > Interfaces: Event Scheduling > Add Event

crunchtime ENTERPRISE MANAGER

Event Scheduling > Add Event

• Detail Exclude Locations

Event Details

Event Name: * Payroll

Event Type: * Payroll (Payroll)

Location(s): * Corporate

CDP User: MiguelOrtiz

Active ☒

Event Schedule

☐ Daily ☒ Weekly ☐ Monthly

Export every: * 1 week(s) on:

Sunday: ☐

Monday: ☐

Tuesday: ☐

Wednesday: ☐

Thursday: ☐

Friday: ☒

Saturday: ☐

3 Enter the following information for the Event Schedule:

- Select *Daily*, *Weekly* (default), or *Monthly* to determine the frequency of the export.
- Provide further specification:
 - **Daily** – Choose either *Every ____ day(s)* and enter the number of recurring days or choose *Every Weekday*.
 - **Weekly** – In the *Export every ____ weeks on:* field enter the number of recurring weeks and check the box for the specific day(s).
 - **Monthly** – Choose either *Day ____* and enter a specific day of the month or choose *Last Day*.

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Schedule an Export

Create a New Event (Continued)

Event Preferences

Enterprise Manager > Interfaces: Event Scheduling > Add Event

crunchtime ENTERPRISE MANAGER

Event Scheduling > Add Event

Detail Exclude Locations

Event Details

Event Name: * Payroll

Event Type: * Payroll (Payroll)

Location(s): * Corporate

CDP User: MiguelOrtiz

Active ☒

Event Schedule

☐ Daily ☒ Weekly ☐ Monthly

Export every: * 1 week(s) on:

Sunday: ☐

Monday: ☐

Tuesday: ☐

Wednesday: ☐

Thursday: ☐

Friday: ☒

Saturday: ☐

Event Preferences

Begin Date: * 02/26/2024

Begin time (24 hour format): * 16:00

End time (24 hour format): * 16:59

Scheduled events will begin every hour within the defined Begin and End times.

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- 4 Enter the Event Preferences:
 - Set the *Begin Date*.
 - Enter the *Begin* and *End times*. The export will run at the beginning of every hour within the defined Begin and End times.
- 5 Select the *Disk* (Save) icon to save this export schedule.

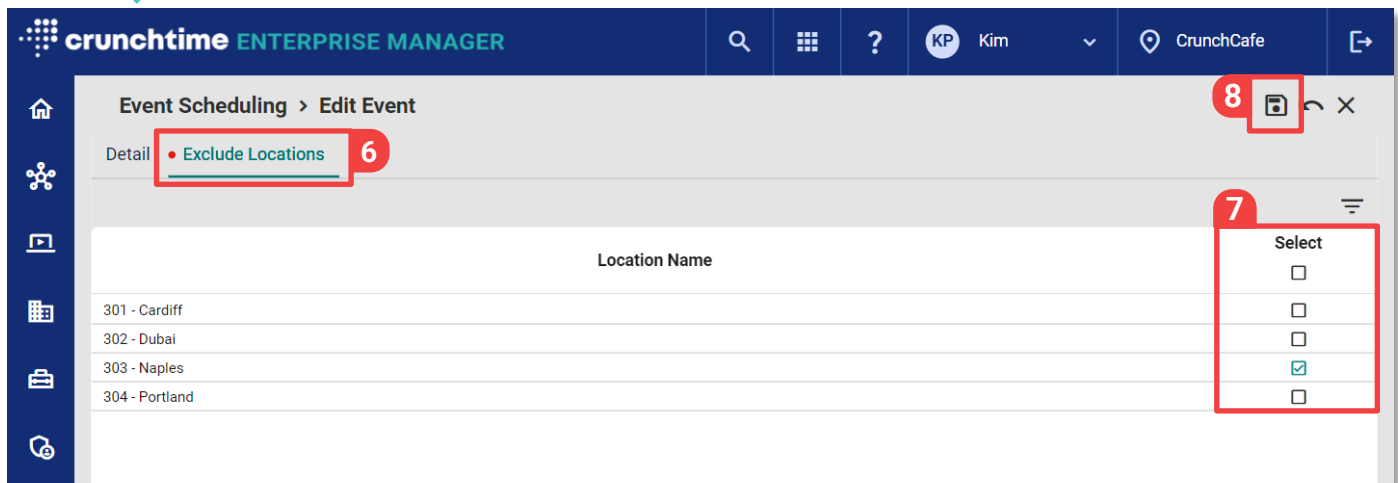
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Schedule an Export

Create a New Event (Continued)

Exclude Locations

Enterprise Manager > Interfaces: Event Scheduling > Event Name: Exclude Locations



Steps 6-8 are optional:

- 6 Select the *Exclude Locations* tab.
- 7 Check the box for each Location that should **not** be included in this scheduled export.
- 8 Select the *Disk* (Save) icon to save this export schedule.

Export Modes

Create a custom export

The *Export Modes* tab allows corporate users to create custom export modes with related destination credentials that can be selected for scheduled events.

Enterprise Manager > Interfaces: Event Scheduling > Export Modes tab

The screenshot shows the Crunchtime Enterprise Manager interface. The top navigation bar includes the logo, search, and user information. The main content area is titled 'Event Scheduling' and has tabs for 'Summary', 'Scheduled Events', 'Event Processing', and 'Export Modes' (highlighted with a red box and number 1). An 'Add' button (highlighted with a red box and number 2) is in the top right. Below the tabs is a table with columns: 'Export Mode Name', 'Export Mode Type', 'Scheduled Events Li...', 'Created Date', and 'Action'. A modal dialog titled 'Export Mode Type' is open, showing 'SFTP' selected (highlighted with a red box and number 3). Below the dialog are 'Continue' and 'Cancel' buttons (highlighted with a red box and number 3). Below the dialog is a larger modal titled 'Add Export Mode'. It shows 'Export Mode Type: SFTP'. On the left, 'Export Mode Name' (highlighted with a red box and number 4) and 'URL' (highlighted with a red box and number 4) are input fields. On the right, 'Login Type' is a dropdown menu set to 'Password' (highlighted with a red box and number 5). Below it are 'Username' (highlighted with a red box and number 6) and 'Password' (highlighted with a red box and number 6) input fields. At the bottom right are 'SFTP Test' (highlighted with a red box and number 7), 'Save' (highlighted with a red box and number 8), and 'Cancel' buttons.

- 1 Select the *Export Modes* tab.
- 2 Click *Add*.
- 3 Select the *Export Mode Type* and click *Continue*.
- 4 Define the *Export Mode Name* and destination *URL*.
- 5 Select *Password* (default) or *SSH Key*.
- 6 Enter the appropriate *Username* and *Password* (or *SSH Key*, if selected)
- 7 Optional: To test the connection, click *SFTP Test*.
- 8 When finished, click *Save*.