



# Report Scheduling User Guide

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## Report Scheduling User Guide Contents

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# 1. Introduction

The scheduling functionality supports regular exports of data by a customer of SuperChoice (Client) from the Reporting module to which they have been granted access. This functionality allows self-service management of the data to be exported, and the frequency.

Exports can be helpful when

- Clients have an internal reporting need
- Daily Reconciliation
- Large data volumes (more than can be supported online 150,000 records)

This guide provides clarity on:

- The initial one-off SuperChoice System set-up, and local sFTP set-up on the client side.
- How to schedule reports

This guide should be read alongside the **Gateway Reporting** and **Employer Reporting User Guides** for full information on report functionality.



## **IMPORTANT - The Client is responsible for:**

- Creating and scheduling of all reports from the Reporting module
- Ensuring all data it has selected for export from the Reporting module is managed according to compliance with their own security obligations and policies.
- Ensuring it complies with the Privacy Act and the Australian Privacy Principles when creating a report from the Reporting module, and in the event of a suspected or actual data or privacy breach, report such matters to SuperChoice immediately; and
- Complying with the Client's own permitted usage of the data policies.

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## 2. One-off Set-up

The following set-up is required before scheduling a report.

### SuperChoice System Set-up

#### Step 1 – Custodian Configuration

Configure your custodian to support sFTP in **My Custodian**<sup>1</sup>, set

- Support File Uploads via sFTP**
- New users have sFTP off by default**

#### Step 2 – Create “Report” Role

Create a new role in **My Custodian >> User Roles** with the following **Rank**, **ID** and **Description**

Rank	ID	Role Description
4985	REPORTING	Reporting

The role must have permissions **Report Access (v2)**, **Schedule Reports & Download Reports**, and then the applicable Reports i.e. **Gateway (Reporting)** if Gateway data is to be exported.

<sup>1</sup> If you do not have access to My Custodian, SuperChoice can assist with the one-off SuperChoice system set-up.

### Step 3 – Create Reporting Export User

Create a new user in **User Maintenance**

- **User ID & Name** - Any available ID and Name can be used as long as **not** an email address. Recommendation is to select something meaningful to help future reference.
- **This user will upload files using sFTP** - Must be ticked
- **Role** - The “Reporting” role should be assigned to the user

Set the **email address** to be a support email box, this should **not** an individual staff member’s email, as you will need this should you forget or wish to reset the password in the future.

If you will be exporting Gateway data, select **All Product Access**

If you will be exporting Clearinghouse data, select **All Employers Access**

## Step 4 – SuperChoice set password

On saving the user, an email will be sent to the email address configured for the user. Follow the instructions in the email, to login and set the password.

## Client Set-up

### Step 5 – Local sFTP set-up

Engage your IT Operations and arrange an sFTP set-up to access and (if required) automatically poll to pull files from the SuperChoice sFTP to your local device or local sFTP directory.

**Production** sftp.employer.com.au port 22

**UAT** sftp.test.employer.com.au port 22

To access the sftp site use

- The password set for the user
- User details as directed by the registration email, either

#### Chosen portal username

You have chosen to upload files via sFTP. The sFTP location is sftp.test.employerpay.com.au on port 22. Please use your portal username and password to login.

or

#### Chosen portalusername@custodian

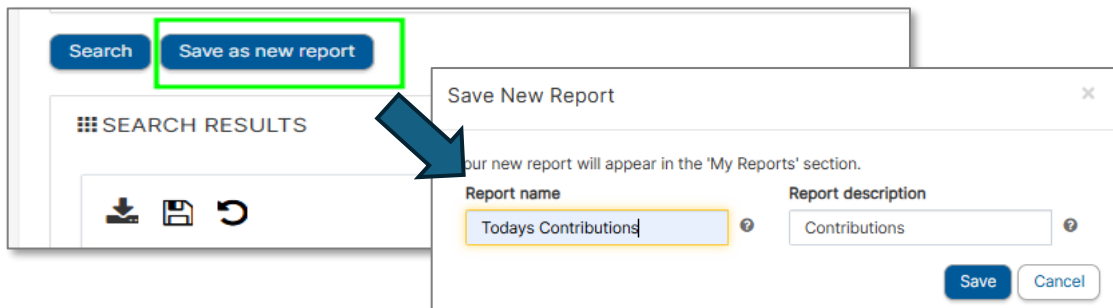
You have chosen to upload files via sFTP. The sFTP location is sftp.test.employerpay.com.au on port 22. Please use your <portalusername>@CustodianABC

### 3. Creating a Custom Scheduled Report

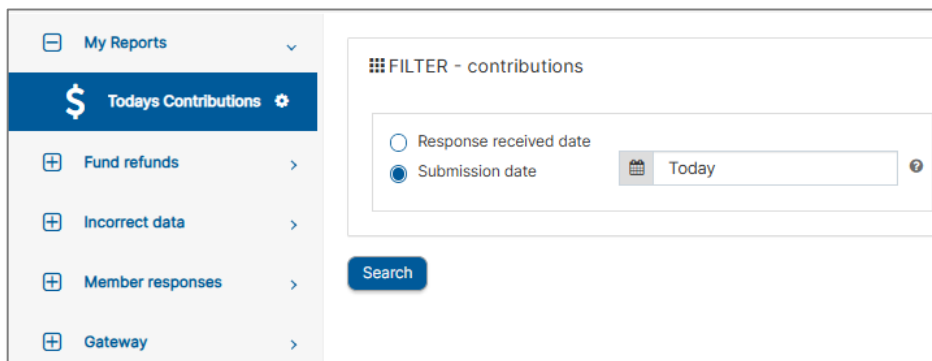
Users can create and save their own custom reports in a few easy steps. Saved reports can then be run whenever the user needs them, without needing to manually configure the outputs they need each time. **Note** – These reports are created and stored at a user level and cannot be made accessible to other users to run.

#### Creating a Custom Report

1. Run a report (see the **Gateway Reporting** or **Employer Reporting User Guides** for full instructions and further details).
2. Edit the **“Report Level - Display Controls”** to get the required report e.g.
  - Modify the fields displayed using the Show/Hide columns button
  - Modify the order of fields displayed using the drag field function
3. Once you have adjusted the fields and filters to display the data the way you need it, click **Save as new report** to provide a name for your custom report:

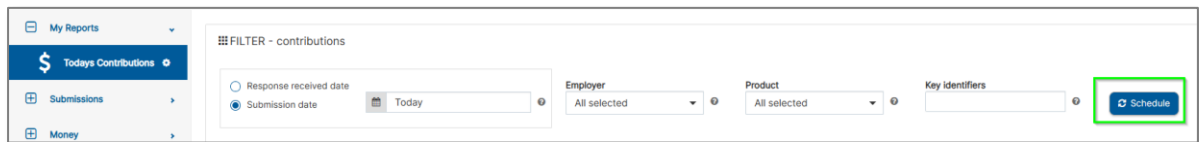
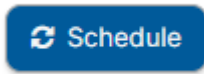


4. Your custom report will now be accessible from the My Reports menu

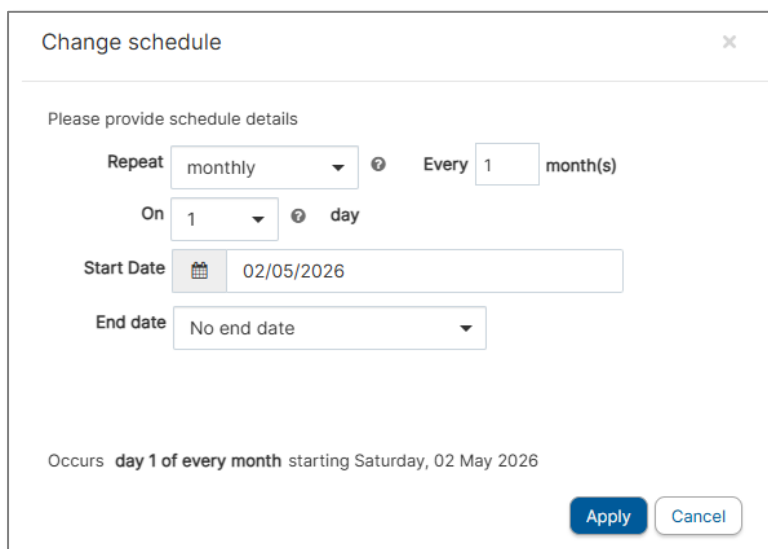


## Scheduling a Custom Report

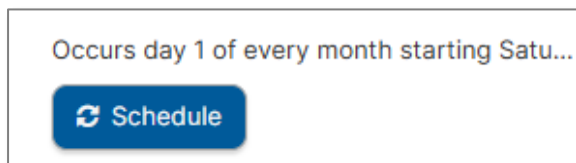
Once a custom report has been created, if the user has permission, they will have the option to schedule the report



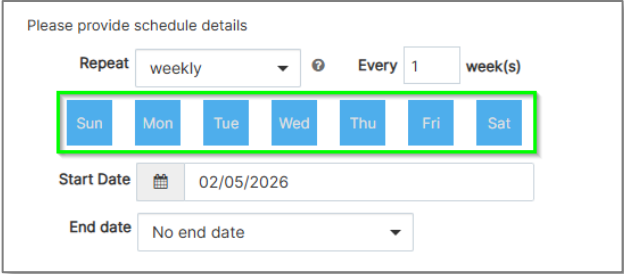
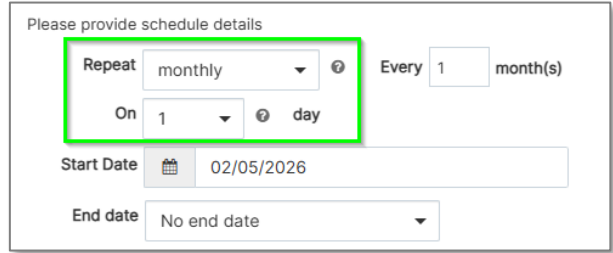
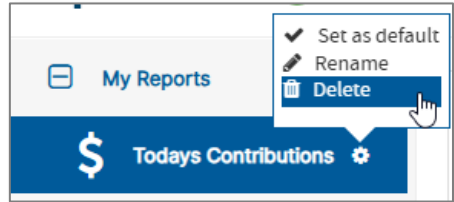
On clicking schedule the following options will appear. See [Scheduled Reports Hints & Tips](#) below for more information.



Once a report is scheduled, a confirmation is displayed above the button



## Scheduled Reports Hints & Tips

<p><b>1. Trial the report before scheduling</b></p>	<p>Recommendation - trial a report by running it online to check the</p> <ul style="list-style-type: none"> <li>Correct <b>report level controls</b> have been set             <ul style="list-style-type: none"> <li>Date Range</li> <li>Employers</li> <li>Products</li> </ul> </li> <li>Appropriate <b>fields</b> selected in the correct sequence</li> </ul>
<p><b>2. I need to export more data than can be viewed online?</b></p>	<p>Trial the report online with constrained report level controls (i.e. a particular day, subset of Employers) to ensure required data is returned. When scheduling the report, set the report level controls as required</p>
<p><b>3a. I want to schedule the report to run every day?</b></p>	<ul style="list-style-type: none"> <li>Set Repeat = <b>Weekly</b></li> <li>Click on each day of the week</li> </ul> 
<p><b>3b. I want to schedule the report to run on a specific day of the month?</b></p>	<ul style="list-style-type: none"> <li>Set Repeat = <b>Monthly</b></li> <li>Select the required day</li> </ul> 
<p><b>4. I no longer need the scheduled report?</b></p>	<p>Click on the cog to the right of the custom report and select delete.</p> 
<p><b>5. I need a daily regular report of all recent data</b></p>	<p>Based on the report filter time period</p> <ul style="list-style-type: none"> <li>Today - (assuming it runs at 02:00 (local) - 3rd April) all transactions from 2 April 00:00 to 3 April 00:00 (local time)</li> <li>Yesterday - (assuming it runs at 2am - 3rd April) all transactions from 1 April 00:00 to 2 April 00:00 (local time)</li> </ul>

## 4. Supporting Information

### sFTP Connectivity

- The SuperChoice SFTP site is located at [sftp.employerpay.com.au](ftp://sftp.employerpay.com.au) on port 22.
- SuperChoice support sFTP only – no FTP, no FTPS.
- Only a username and password are required for authentication to the sFTP.
- PGP encryption is currently not supported.
- The following is not supported:
  - No Public/private key encryption authentication
  - IP Address whitelisting
  - Multi Factor Authentication
- Scheduled reports must be pulled and deleted from the SuperChoice sFTP server, and saved locally on the client side.

### Report Output

- The format of the scheduled report is identical to the downloaded report .csv
- The filename format is the custom report name appended with the time executed using date and hour e.g. customnamereport\_202511020000\_.csv
- The CSV file is automatically dropped into an sFTP folder **[sftp.employer.com.au/Reports](ftp://sftp.employer.com.au/Reports)**.

### Report Timing

- The report will be run overnight from 2am, completion time is dependent on size of report and sequences with other reports.
- If the system is down while a report schedule is run, then the schedule is rerun when it is started but reports that are due immediately at the time of the rerun are prioritised