How to automatically email a comma separated file containing users

A **Flat File Export** works like a Report Export, but sends a data file instead of a report. This one emails a list of users, with the fields you choose, for example every night for another system to import. The PDServer sends it through an Email Send Account; see *How to create an Email Send Account* if you have not set one up.

Create the Flat File Export

1. Open Resource Manager.
2. In the tree, click **Scheduled Tasks** > **Flat File Exports**.
3. Click **Add**. The **Flat File Export** window opens.
4. On the first page, fill in the **Flat File Export name**, **Execute on PDServer**, **Send condition**, and the email details (**Account**, **To**, **Subject** and **Message**). These work as for a Report Export; see *How to set up automatic emailing of reports*. Click **Next >**.
5. Choose the schedule, for example **Daily** at 06:00, and click **Next >**.
6. In the tree, click **Flat File Exports** > **Users Export**, and click **Next >**.
7. Choose the file settings as described in *How to create a comma separated file containing users*: the **Delimiter** (for example **Comma**), **Export column headers as first row**, the **Fields to be exported** and their order, and any **Filter Departments** or **Filter Users**.
8. Click **Finish**.

Test it now

1. In **Scheduled Tasks** > **Flat File Exports**, right-click the Flat File Export and click **Execute now**.
2. In the **Execute on Next Refresh** window, leave **Use the current execution date & time** (the date does not matter for a list of users), and click **OK**. Resource Manager asks the PDServer to run it straight away.
3. After a minute or two, click **View** > **Refresh** and check the **Last run**, **Status** and **Last message** columns. Then check that the email arrived.

Related articles

- *How to create a comma separated file containing users*
- *How to set up automatic emailing of reports*
- *How to create an Email Send Account*

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