

Customer Data Export Requests

INTERNAL — Helix Engineering / CS Operations

TYPES OF EXPORT REQUESTS

(1) Self-service exports via the UI (most common). (2) Bulk exports for large workspaces. (3) DSAR exports for GDPR compliance. (4) Pre-cancellation full exports.

SELF-SERVICE EXPORTS

Customers initiate from Settings → Data → Export. Helix generates the export asynchronously and emails a signed URL. The URL is valid for 24 hours. CSMs do not need to be involved.

BULK EXPORTS

For workspaces with >10M run records, self-service may time out. CSM files a backend export job via the internal admin tool. Provide: workspace ID, date range, formats. Backend completes within 24 hours and emails the customer directly.

DSAR EXPORTS

For GDPR data subject access requests, follow the privacy procedure. Compile within 7 days. Include profile data, workspace memberships, workflows authored, and audit log entries. Delete the source data per the GDPR deletion procedure if requested (30-day window).

PRE-CANCELLATION EXPORTS

Customers cancelling their account often want a complete dump. Offer the bulk export proactively when handling cancellations. This reduces post-cancellation support requests.

URL EXPIRY

All export URLs expire after 24 hours. If a customer's link expires, regenerate from the admin panel — the export file is retained for 7 days.

FORMAT SUPPORT

JSON for workflows and full data dumps. CSV for tabular data (runs, audit log). PDF only for invoices.