

Fast•Class File

Client Data System

Volume 40: Data Export

Before data can be exported out of CDS, an export definition must be created in the Import/Export utility.

To create an export definition in CDS –

- From the main screen of CDS, click on **Database** in the main menu.
- Select **Utilities**.
- Select **Import/Export**.

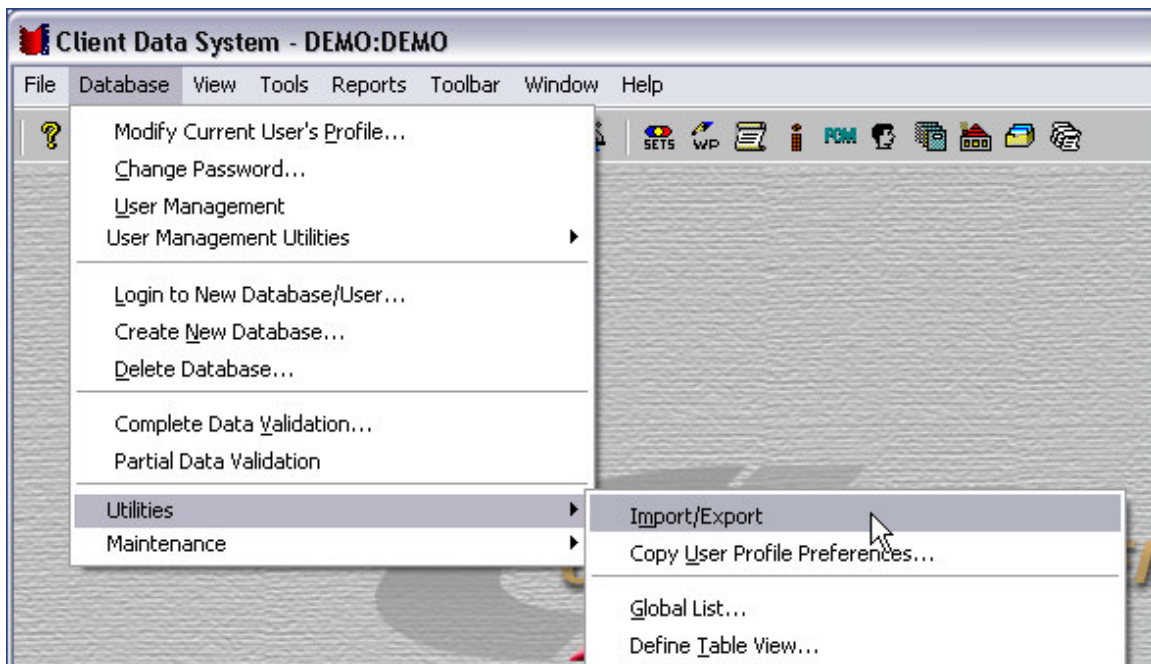


Figure 1: The Import/Export menu item.

- Click the **Add Record** button in the **Import/Export Definitions** window.

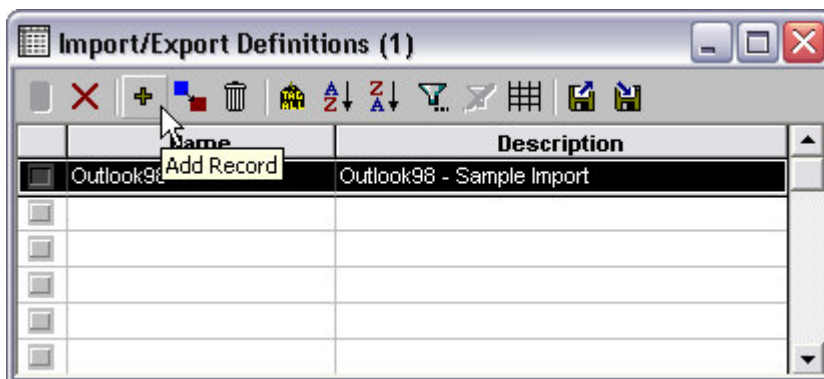


Figure 2: The Import/Export Definitions window (Add Record button highlighted).

- Select the **Comma Separated Value** option in the **Import/Export Selection Type** window.



Figure 3: The Import/Export Selection Type window.

- In the **Table Names** window, select **Contact Information**.

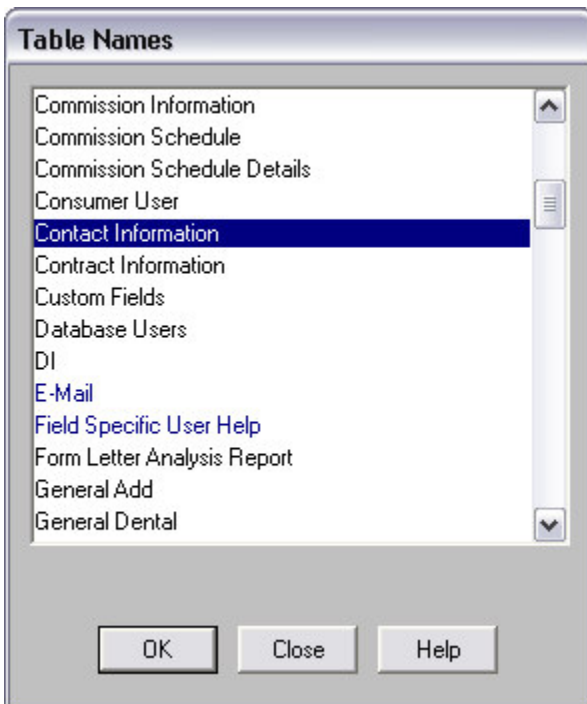


Figure 4: The Table Names window (Contact Information table selected)

- CDS will display a message regarding phone and address data. When phone or address information is exported, specific fields at the bottom of the **Columns Available** section of the **Import/Export Definition** window must be used to ensure that data is exported correctly.

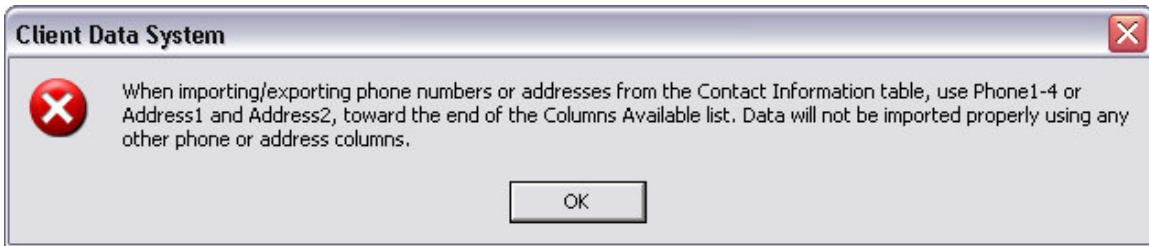


Figure 5: The phone and address information window.

- Review the information in the phone and address message and then click **OK**.
- The **Import/Export Definition** window will open.
- Select columns for the export in the **Columns Available** section of the **Import/Export Definition** window and move them into the **Columns** selected section. Move selected columns using the arrow button in-between the **Columns Available** section and the **Columns Selected** section or by double-clicking the selected column.

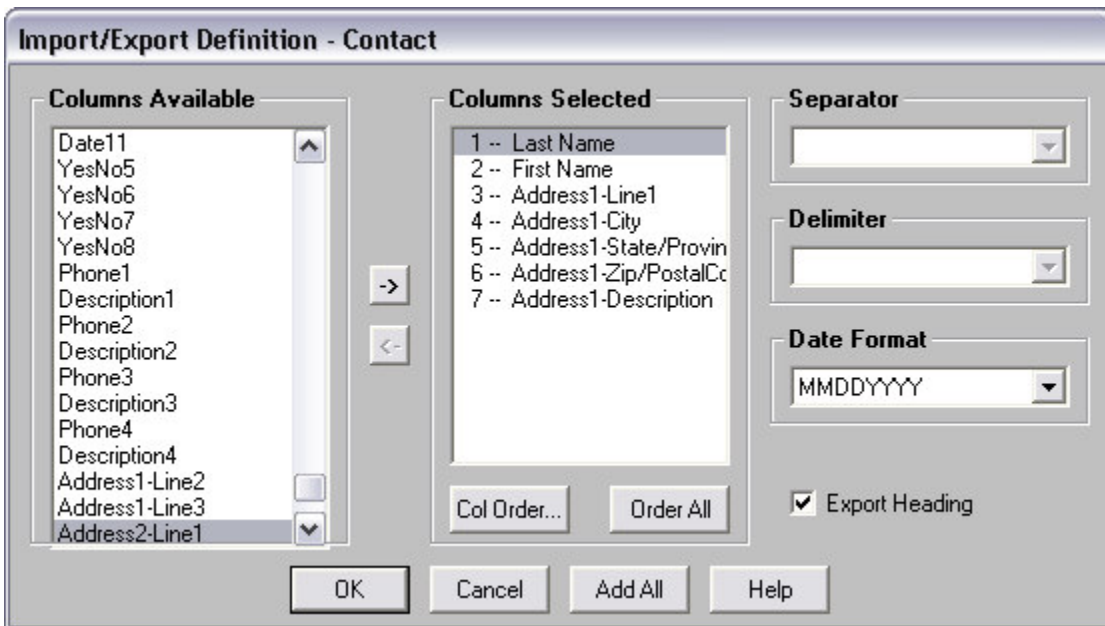


Figure 6: The phone and address information window (with columns selected).

Moving columns into the **Columns Selected** section creates a map for CDS to follow when exporting data. The number preceding a column entry indicates which column in the .csv file CDS will place data from the selected column. For example, the first entry in the **Columns Selected** section, **1 – Last Name**, indicates that data in **Last Name** column of the contact record will be exported into the first column of the .csv file.

Note: Ensure the address and phone information has been properly mapped using the appropriate fields: Phone1-Description1, Phone2-Description2, and so on.

- When column mapping is completed, click **OK**.
- Select the **Export Heading** option to add column headers to the .csv file.
- Give the export definition a name in the **Name** field and click **OK**.

The Export definition has been created and can be used to export data out of CDS.

To export data out of CDS using an export definition –

- Select an export definition in the **Import/Export Definition** window and click the **Export** button.

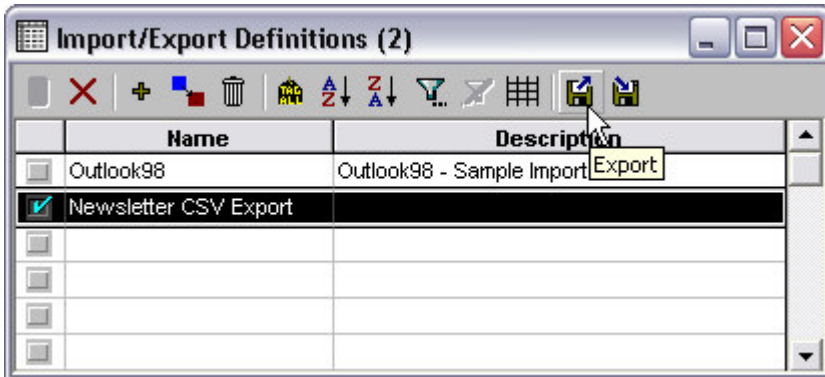


Figure 7: Selected export definition and the Export button in the Import/Export Definition window.

- CDS will open the **Filter Selection – Export** window.
- Use the **Filter** drop-down fields or the **Set** drop-down field to select records for the export.

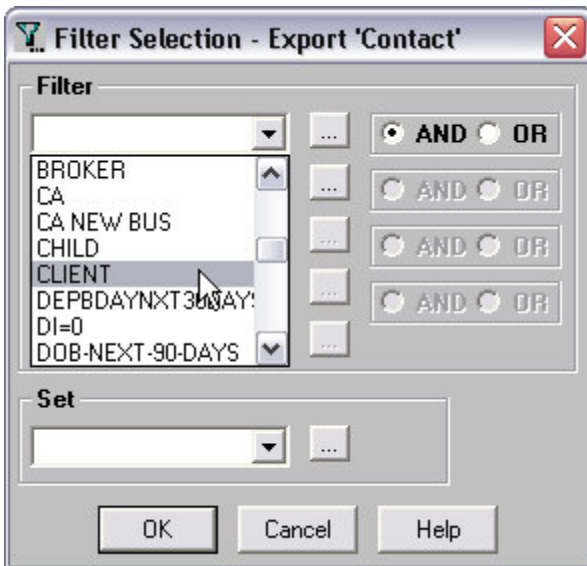


Figure 8: The Filter Selection – Export window (Filter drop-down field active)

Note that in this example, the filters that are available are contact record filters as the export is based on the **Contact Information** table. If the export were based on the **Policy** table, policy filters would be available in the **Filter** drop-down fields. The **Set** drop-down field will be available only if the export is based on the **Contact** table.

- After selecting records using the **Filter** and **Set** drop-down fields, click **OK**.

Note: If no selection is made using the Filter and Set drop-down fields, all relevant records will be selected for the export.

- CDS will open the **Export File Name** window.

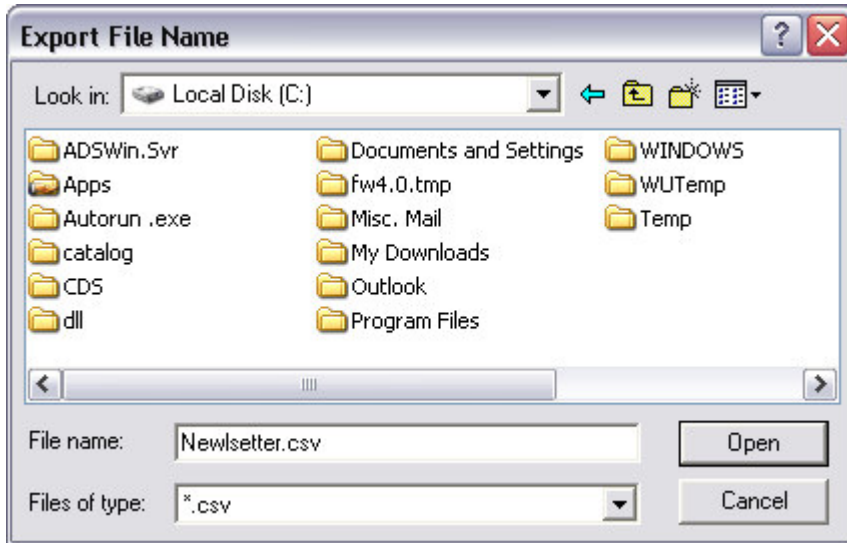


Figure 9: The Export File Name window.

- Use the **Look in** drop down field to select the location where the .csv export file will be saved.
- Name the export .csv file in the **File name** field. Be sure to leave the .csv extension in place so that the file can be easily opened when the export is complete.
- Click **Open** to begin the export.
- When the export is complete, CDS will display an information window indicating that the export is complete and the path to the exported .csv.

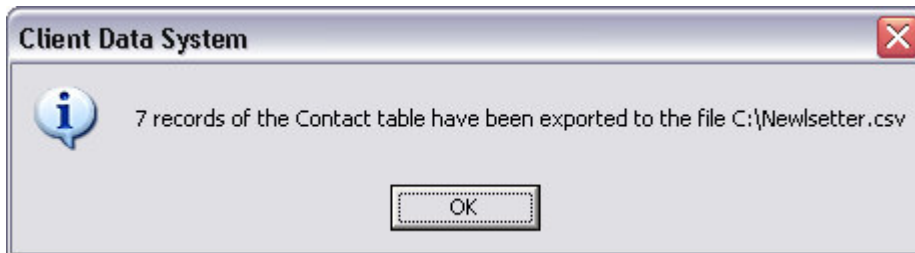


Figure 10: The completed export information window.

- Click **OK**.
- Follow the path the newly created .csv file, open the file and review the exported data. If Microsoft Excel has been designated as the default application to open .csv files, the icon will appear as an Excel icon with a character and a comma, denoting the .csv file type.

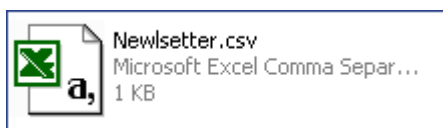


Figure 11: The exported .csv file with Excel icon (Excel set as default application to open .csv files)