Fast·Class File

Client Data System

Volume 92: 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 CDS main screen, click on **Database** in the main menu.
- Select **Utilities**.
- Select **Import/Export**.
- Click the **Add Record** button in the **Import/Export Definitions** window.
- Select the **Comma Separated Value** option in the **Import/Export Selection Type** window.
- In the **Table Names** window, select **Contact Information**.
- 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.
- Review the information in the phone and address message and then click **OK**.
- The **Import/Export Definition** window will open.
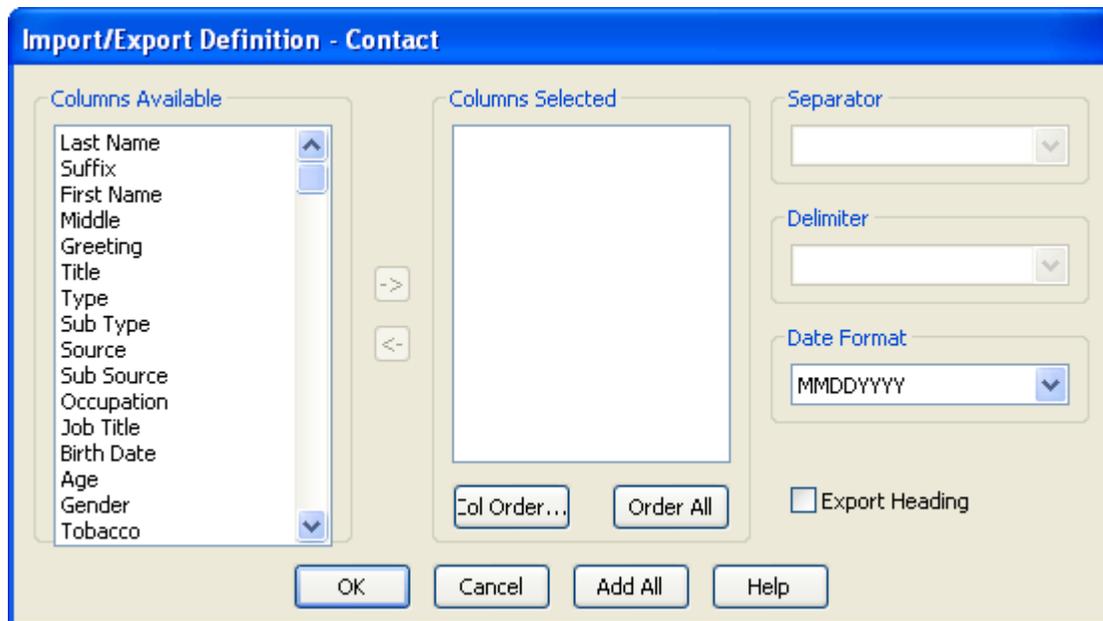
Figure 1: The Import/Export Definition window

- 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.

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 the **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: Phone-1Description 1, Phone2-Description 2, 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.
- 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.

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.
- 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 file.
- Click **OK**.
- Follow the path of 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 2: Exported .csv file