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Introduction

Contact management systems, by their very nature, hold vast amounts of data and have the ability to manipulate that data by various means. Occasionally, users will want to manipulate their data in another program or by some other means not available within their current program. The relevant data must be extracted from the contact management program and imported into the other program.

Because no one program has the ability to anticipate all the needs of its end users, SmartOffice[®], like many other contact management programs, provides a means for the extraction and manipulation of data. Data can be exported from a spreadsheet into MS Excel or other industry standard Comma Separate Value (CSV) formats. Dynamic Reports can be linked to MS Excel templates as a means of extending the power of data manipulation through macros. Filters and Dynamic Report definitions can be exported and imported into another office and spreadsheet data can be extracted into an Adobe Acrobat (PDF) document by all users.

User Management Security Requirements

Two roles independently control the ability of users to export data from SmartOffice. An additional role, Excel Template Maintenance, is also related but not required. All basic SmartOffice users have the ability to extract data from spreadsheets and display it in a PDF format.

- **Data Export:** This role provides the ability to export data from spreadsheets and both the Filter and Dynamic Report summaries.
- **Run Dynamic Reports with Excel Templates:** This role provides the ability to run a Dynamic Report with an associated MS Excel Template and manipulate the data using MS Excel.
- **Excel Template Maintenance:** This role provides the ability to add MS Excel templates and make them available within SmartOffice. The MS Excel Templates can then be associated with Dynamic Reports.

Exporting Data from a Spreadsheet

Many of the spreadsheets in the SmartOffice program contain the Spreadsheet Export button. This button will export the number of records that display in the current spreadsheet only, except when processed from a Dynamic Report. If there are a possible 3000 records that meet the criteria of a search parameter and only the first 50 are currently being viewed, the Spreadsheet Export button will export only those first 50 records. This is due to the nature of data aggregation within the User Interface. However, when the Spreadsheet Export button is selected from the Dynamic Report data summary, all the records that meet the criteria of the report will be exported without regard to the current number in the present view. This solution, which communicates directly with the database, has been provided to enable users to export a large amount of data without restrictions.

When the Spreadsheet Export button is selected, a dialog box opens which enables users to export data into a variety of formats. The user can select the **XLS – MS Excel** format, one of five different application standards that support the **CSV** format, one of four different application standards that support the **XML** format, or one of five different application standards that support the **TAB Separated** format. For all the CSV and TAB Separated formats, the user has the ability to export the column headings in addition to the data. Column headings are exported by default when the XLS – MS Excel format is selected but is not present when any of the XML formats are selected due to the nature of this format. Any spreadsheet that contains contact related data will also have an additional option enabling the user to post a message to the SmartPad of all exported contacts. Once the data has been exported, the user can manipulate the data by any means possible based on the format selected. For example, if the user exports the data in XLS – MS Excel format, column headings can be renamed, and the data can be split or moved around.

Processing a Dynamic Report with an Excel Template

An Excel Template can be linked to a Dynamic Report, which extends the data analysis capabilities of the SmartOffice system. A special MS Excel file must be loaded by a user with the role of **Excel Template Maintenance** and it can then be linked to the appropriate Dynamic Report by a user with the **Dynamic Report Maintenance** role. There are specific requirements for both the creation of the MS Excel file as well as the creation of the Dynamic Report. Additional details of these requirements are discussed in the *Dynamic Report with Excel Template User Guide* document, which is available from the SmartOffice Online Help system. Once the report has been created, a user with the role of **Run Dynamic Reports with Excel Templates** can process the data and export it to MS Excel by first tagging the report and then selecting the **Run Excel Template** button from the Dynamic Report Summary. This button is not designed to process data for Dynamic Reports that do not have an Excel Template attached and may return unwanted results if used in this manner.

Export Definition – Dynamic Reports and Filters

Both the Dynamic Report Summary and the Filters Summary contain a button that will export the description of the various elements that comprise either a Dynamic Report, including any attached Filters, or a Filter. When one of the entries on the Summary is selected and the appropriate Export Definition button is selected, then a new browser window will open that contains the description of the item in an XML format. The user will select **File** and **Save As**, to save the Definition of either the Dynamic Report or the Filter on the hard drive of their computer. This XML formatted file can then be imported into the appropriate area of the program by a user with the role of **Data Import**. This user will select the appropriate Import Definition button in the corresponding area of the program. When a Dynamic Report is imported with an attached Filter with a duplicate name, the user will be prompted to overwrite the existing Filter or import the duplicate Filter.

Print Spreadsheet

The majority of the spreadsheets in SmartOffice contain a Print Spreadsheet button. When this button is selected, a dialog box opens that prompts the user to either **Print Tagged Rows** or **Print All** of the records. On certain spreadsheets where this is applicable, such as the contact spreadsheets, there may be two additional options: Print Spreadsheet Rows or Print Details Page. These radio buttons can be selected in various combinations, with no more than one option from the top section and only one from the bottom section being available at a given time.

The appropriate number of records will be extracted to a PDF formatted file when the **Print Spreadsheet** button is selected. The user can then manipulate the data based on capabilities and limitations of the installed version of either Adobe Reader, or some other PDF authoring program installed on their computer. If all of the records that comprise a certain spreadsheet (based on the search criteria) are already selected, then it is possible that the spreadsheet rows will simply print to a PDF file without displaying the dialog box.

The Print Details Page option will not extract the data to a PDF formatted file. Instead, a new browser window will open and display the appropriate number of detail pages based on the selection, either Print Tagged Rows or Print All. The user has the option to display the Detail page data or print it out. This option provides quick access to this area of the program without requiring the user to open each detail page individually.