

How to Export SQLWorks Data to Spreadsheet

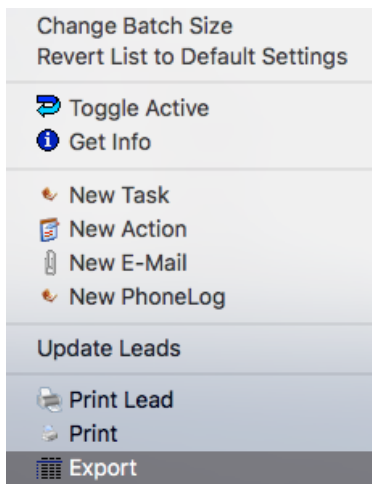
Procedure

For extra flexibility, data from SQLWorks can be exported to delimited file types, such as a .txt, .csv or .xlsx*. These can be opened in Microsoft Excel, Google Sheets, Open Office or a similar spreadsheet application.

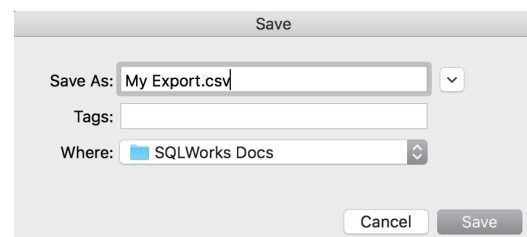
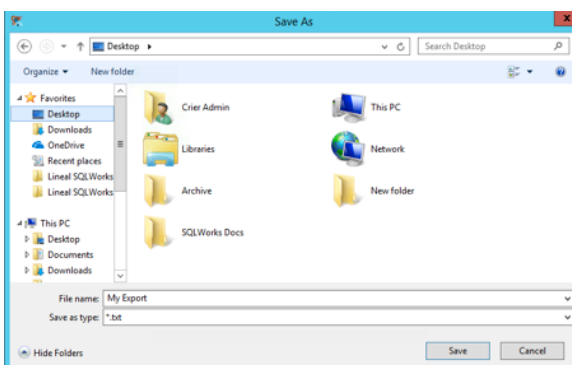
This option may need to be set by your System Administrator or the SQLWorks Team - please ask if you require help.

1. Quick Export your data.

By right clicking in most** SQLWorks tables and clicking 'Export' from the dropdown, you can export what you can see in that table.



On both Windows and Mac, you will be prompted to give the new file a filename, and save to a file location of your choice on your device.

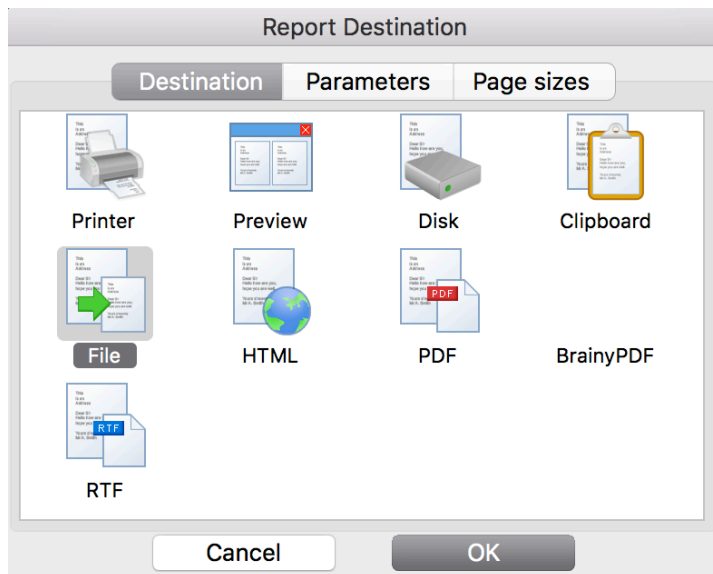


This data will be either saved as a .txt (delimited text) or .csv (comma-separated values) file, depending on your system preferences. ***

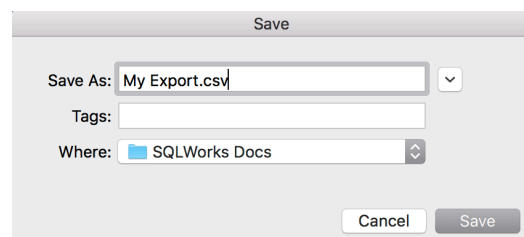
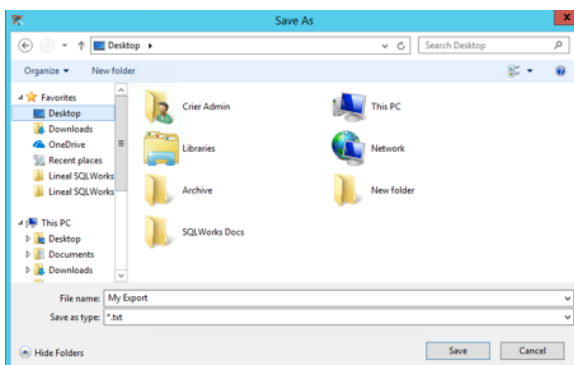
The first row of the exported data will give column headings for the data with the same names as the corresponding labels in SQLWorks.

2. Exporting to File

When printing a report, users are prompted with the following output options window. To export data to a tabulated format, choose 'File' and click 'OK':



On both Windows and Mac, you will be prompted to give the new file a filename, and save to a file location of your choice on your device. Click 'Save'.



Procedures

This data will be either saved as a .txt (delimited text) or .csv (comma-separated values) file, depending on your system preferences.

When opened, the first row of the exported data will give column headings for the data with the same names as the corresponding labels in SQLWorks.

*Direct export to Microsoft Excel file type by request.

** Some tables are restricted by default for data security.

*** The default file export time can be set in CRM Prefs > 'Doc Management' tab.