Public-Private Dialogue

The PPD Reform Tracking Tool

7 - Exchanging data

You can exchange information between FileMaker Pro and other applications by importing and exporting data. This is in particular relevant if you already managed your issues on an Excel Spreadsheet.

You can:

- import data into an existing FileMaker Pro file, either into a new table or into an existing table
- convert data from other applications to new FileMaker Pro files
- export data for use in other applications

Saving records in excel or pdf or exporting only some fields

You can save FileMaker Pro data as a Microsoft Excel file or an Adobe PDF file, allowing you to give data to users who don't have FileMaker Pro.

You can either save all the record in excel/pdf or only part of it by selecting some fields of the record.

To export all the record with all its fields

1. Choose File menu > Save/Send Records As > PDF or Excel or click on the software icons in preview mode

2. Choose a name and Click Save

To only export some of the fields

1. Choose File menu Export records > PDF or Excel

2. Choose a name and Click Save

3. Choose the fields to export and the export order

4. If the records were sorted by a category when you started the export, this category will appear in "group by". If you don't want this to happen, go back to browse mode. Click on the sort button and "clear all".

Importing data

There are several ways to import data into an existing file. You can:

- add new records to an existing table

- create a new table from imported data

- update existing records in an existing table

- update matching records in an existing table

Important Certain import operations that update existing records and update matching records overwrite existing data during the import process, which cannot be undone. To safeguard your data, always choose File menu > Save a Copy As to make a backup of the file before you perform an import that updates records.

The file you import records from is the *source*. The file you import records to is the *target*.

Import data into the file Issue Making

1. Open your file

2. Choose File menu > Import Records > File.

3. Choose the file which will be **the source file.**

4. Click Open.

The Import Field Mapping dialog box appears.

5. For Target, select the Table that you need to be fed by the new imported data

6. For Import Action, select one of the three options Add new records, update existing records in found set, update matching records in found set

7. Make sure that the Name fields in Source Fields are on the same row as the Name fields in Target Fields.

You can move target fields up and down in the list using the slider.