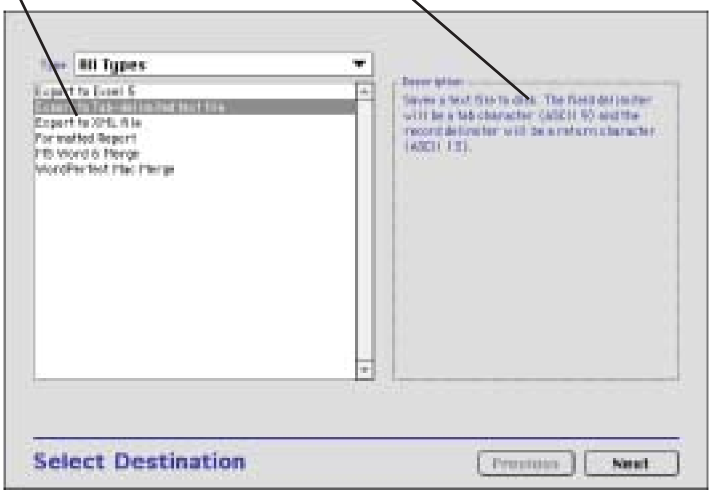
Exporting Data

Item description

Available formats



Send Data window

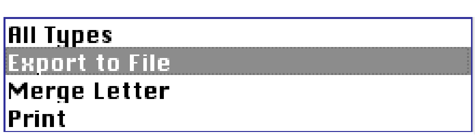
Exporting Data

You may export any of the data you have entered into *De Novo CaseMgr*. Exported data is saved to a disk file in the format of your choice. You can also name and save your export configurations for later reuse.

Exporting data is handled through the ***Send Data*** window, which can be reached either by selecting **Send/Merge** from the **File** menu or by pressing *Control-M*. In addition to exporting data, the ***Send Data*** window is used for various other output options, such as mail merge documents and formatted reports. It uses a "wizard" format to walk you through each step of the output process. Each step is identified at the lower left of the window.

The first step, labeled "Select Destination," is to select the output format you want from the list of available formats. You may move through the list using the keyboard arrow keys or by clicking once on any line with the mouse. You can also limit the options in the list to just export, merge, or print formats using the pop-up button above the list. Notice that as each item on the Available Formats list is highlighted, a description of that format appears in the *Description* box on the right side of the window. Above the list is a pop-up menu which may be used to filter the list. To see only the options for exporting data, for example, select "Export to File" from the pop-up menu.

Select the Format



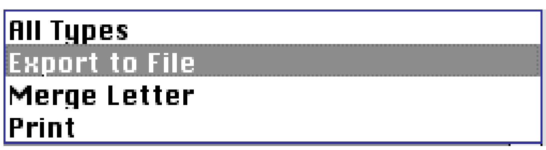
Send Data Types pop-up

Select the export format you want , either by double-clicking the desired format on the list, or by clicking it once to highlight it and then clicking the "Next" button in the lower right corner of the window to advance to the next step.

In the next step, labeled “Select Template,” you will select a previously-saved export configuration template or initiate creating a new one. In *CaseMgr*, the term “template” refers to a complete definition of what data will be exported and how it will be formatted. Before using the template to export data, you’ll have the opportunity to save the template for later reuse. The template options are listed on the left side of the window. As each item on the list is highlighted, a description of it appears in the box on the right side of the window, if such a description was entered by the user who created the template. (The first time you use *CaseMgr* there will be no saved templates, so you’ll see only the options for creating a New Template.)

Send Data window

If, prior to opening the “Send Data” window, you were looking at a list or detail window, you will have the option of listing only the saved templates applicable to that window. The means that if the previous window was the detail window (see page X for information about detail windows) for a particular matter, you will see only saved templates that contain matter fields. If the previous window was a list (see page Y) of court reporters, the list will include only templates that contain court reporter fields. If you don’t see the template you want, make sure that “Show all templates” is selected above the list.



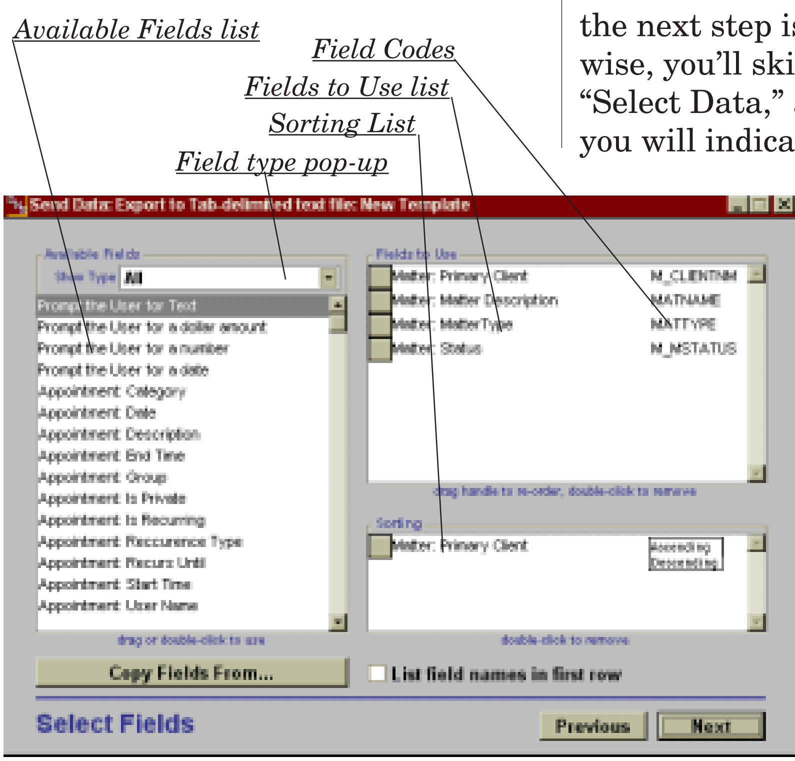
Field Type pop-up

Create a Template

Creating a new template

The first items on the list are always the options for creating a new template, “New Template” and (if templates have previously been created and saved) “New Template, based on existing template.” The first creates a new blank template, while the second starts with a copy of a previously-saved template, which you may then modify and re-save with another name.

Selecting Fields



Select Fields **pane of the *Send Data* window**

Using an Existing template

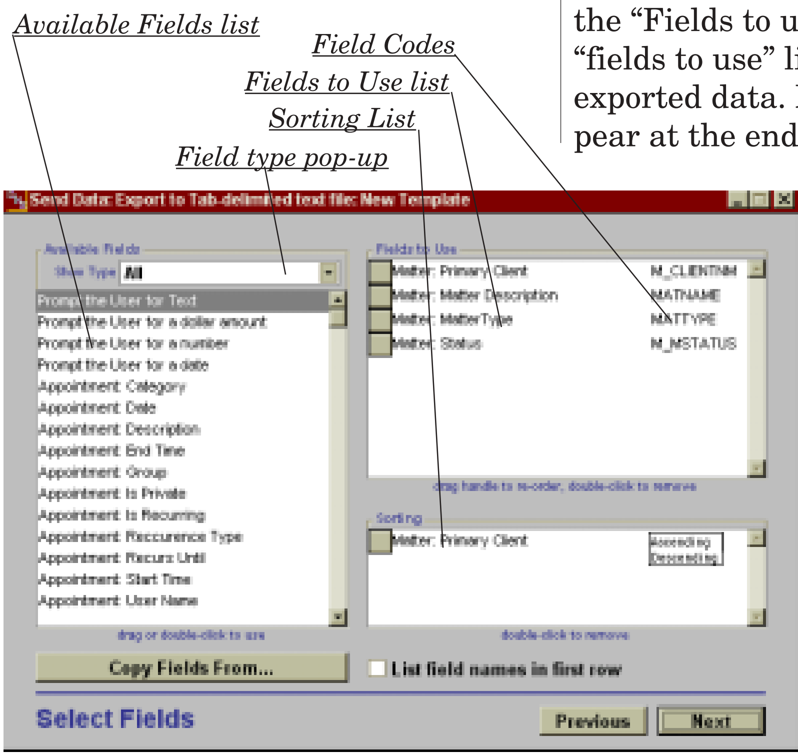
To reuse a previously-saved template, highlight it in the list and then either click the "Next" button or double-click on the list. If you wish to review or modify the configuration of the saved template, mark the checkbox below the list labeled "I want to view/edit the template before exporting." If you just want to export the data immediately, make sure this box is not checked.

Selecting Fields

If you are creating a new template or have indicated that you wish to edit an existing one, the next step is labeled "Select Fields." (Otherwise, you'll skip directly to the step labeled "Select Data," as described below.) In this step, you will indicate what information will be exported and in what order it will be listed. The available fields are listed on the left side of the window. The box at the upper right will contain all the fields selected for use, and the fields in the box at bottom right are used to define the sort order.

The available fields list contains over 500 fields, so it may be difficult to find the field you want until you narrow the list be selecting a type of field in the "Show Type" pop-up menu above the field list.

If you are editing a previously-saved template, or creating a new template based on an existing one, there will be one or more fields already designated for use. If you are creating a new template, whether there are any fields pre-selected depends on what window you were last using before you selected "Send Data." If the last window was a list window, the fields included in the list are be automatically filled in



Select Fields **pane of the** ***Send Data*** **window**

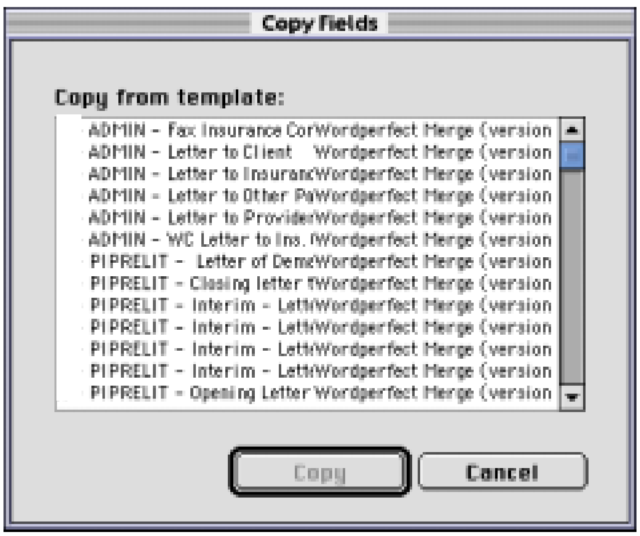
for you.

To designate additional fields to be exported, first select the field on the available fields list. Then either press the return key, double-click an item in the list, or click and drag the field into the “Fields to use” list. The order of fields in the “fields to use” list indicates their order in the exported data. Newly-added fields always appear at the end, but you can change the order by clicking and dragging the grey box on the left of the field name in the “fields to use” list.

To the right of the field name in the “fields to use” list is a short field code. This is the field name that will appear in the first line of the exported data if you check the box labeled “list field names in first row.” You can override the short field code supplied by *CaseMgr* by clicking on the field code and holding the mouse button down for just a moment. A box will appear around the field code, indicating that you can now edit it like any other text. Enter a code not currently being used for any other field. It may contain any letters or numbers but must start with a letter and may not contain any spaces.

The order of your exported data is determined by the contents and order of the “sorting” list in the bottom right area of the window. The first field listed will be the primary sort, the second will be secondary sort, and so on. To change the priority of the sort level, click and drag the box on the left of the field name. The direction of each sort level (i.e. ascending or descending) appears in the list on the right of the field name. To change the sort direction, click and hold the mouse button on the word “ascending” or “descending.”

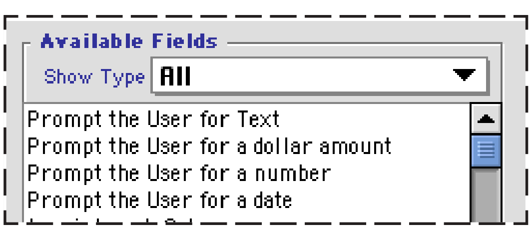
A menu will pop up, from which you can select the direction. Note that you can only sort by fields included in your output. If you drag a field from the "available fields" list to the "sorting" list, it will be automatically added to the "fields to use" list as well. If you don't specify any fields for sorting, your output will be sorted by the first field used, in ascending order.



***Copy Fields* window**

Below the list of available fields is a button labeled "Copy fields from...", Clicking it will display a list of previously-saved templates. These templates may be of any type supported by the send window (see the discussion of step 1 above); regardless of other differences, all types use the same available fields. When you select a template and click the "Copy" button, any fields currently in the "fields to use" list will be replaced by the field list used by the template just selected.

Depending on what program you'll be using your exported data with, you may need the first line of the data file to contain a list of fields instead of the data itself. This first line is commonly called a "field header." Consult the documentation of the program you'll be using in order to determine if you need this. If you do, you should check the box below the Sort list on the *Send Data* window, labeled "List field names in first row."

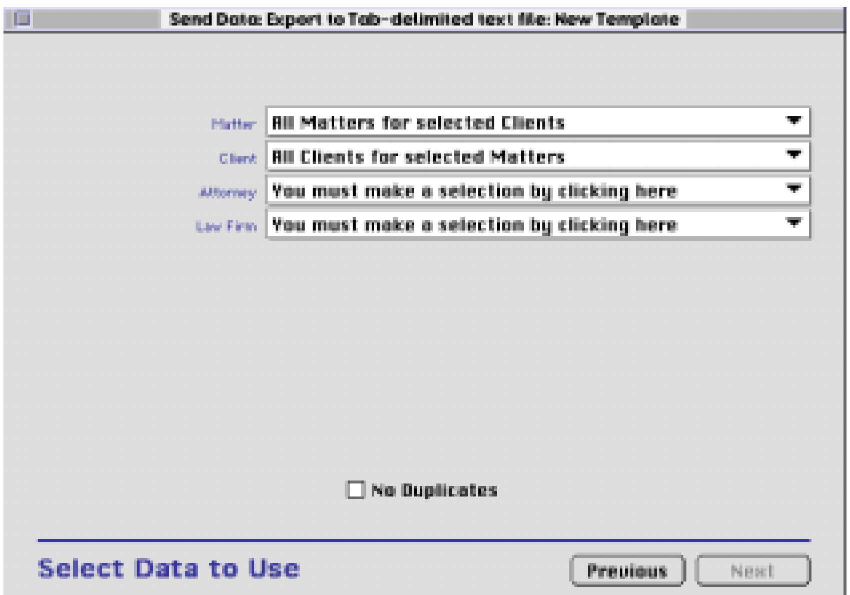


At the top of the available field list are several prompt fields. These are different from all of the other available fields. Rather than being pulled from data you've previously entered into *De Novo CaseMgr*'s various windows, the information in these fields will be requested from the user (that's you, usually) at the time the data is exported. Every row of the exported file will contain the same information in that field: the information entered by the user. The prompt fields are also different in that you can use each one as many times as you want in each export template; all other fields may be used only once each per template.

When you have selected all the fields you want to use, click the **Next** button to advance to the next step.

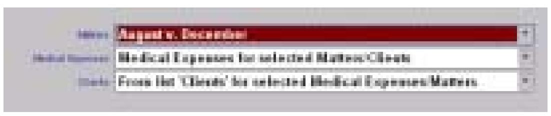
Selecting the data

In the next step, you are presented a list of all the different types of information represented by the fields you selected in the previous step.



Select the range of information of each type to export. For example, if you selected matter fields for use in the previous step, you will be asked in this step to select which matters to export. If you selected any client fields then you'll also be asked to select which clients, and so on for all types of fields you selected. (If you're using any "prompt the user" fields, this is also the step where you'll be prompted to enter the information that will be included in the exported data.) You will indicate the range of data of each type to export using pop-up menus; there will be one for each type of field you have selected. There are several kinds of selection available from each pop-up menu.

First, you can select all records. This is always the first item in the pop-up menu. Next, you may select a single record, or any number of specific records. This may be done by selecting the second-to-last item in the pop-up menu, "Select Records...". This option will bring up a window with a list of records. On this list window you



From List pop-up

can select a single record by double-clicking an item in the list, or multiple records by shift-clicking on the items of interest and then clicking the "**OK**" button at the bottom of the list window.

In addition, specific records may be listed in the pop-up menu; if they are, you can select them. *De Novo CaseMgr* tries to guess from context which records might be of interest and place them in the pop-up menu, so before choosing "Select Records..." from the bottom of the menu you should scan the rest of the menu to see if the record you want is already listed there.

If you have a list window open in the background, the pop-up menu for the corresponding type of field will also have an option naming the list window (e.g. "From list window "Clients"). If you select this option, all of the records selected by the current "show" filter setting of that list will be selected.

The filter menus for some types of data will have additional options, such as "Active Matters" in the pop-up menu for filtering matters. These are intended to provide quick access to commonly-used filtering needs; for more complex or less common filtering options open and configure a list window. You can do this without closing the "Send Data" window; if you return to the "Send Data" window with the newly-opened list window in the background, the filter menu for that data type is include that list window.

Automatic Linking

Depending on the context, automatic linking between the different types of data may be in effect. This automatic linking is a very powerful feature, and understanding how it works is crucial to getting the results you expect. For the following explanation of automatic linking, we'll use the example of a template for which you've

Insurance Companies:
Acme HealthCare
U.S. Indemnity
Western Mutual

Adjusters:
Jane Doe (works for *Western*)
John Smith (works for *Acme*)

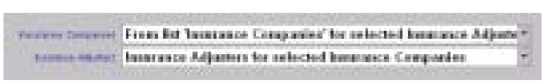
Linking - Figure 1

Jane Doe — *Acme HealthCare*
Jane Doe — *U.S. Indemnity*
Jane Doe — *Western Mutual*
John Smith — *Acme HealthCare*
John Smith — *U.S. Indemnity*
John Smith — *Western Mutual*

Figure 2- without linking

John Smith — Acme HealthCare
Jane Doe — Western Mutual

Figure 3- with auto linking



Auto linked pop-ups

specified the insurance company name field and the adjuster name field. The entire contents of the *Adjuster* and *Insurance Company* lists is shown in the L*inking, Figure 1* sample at left.

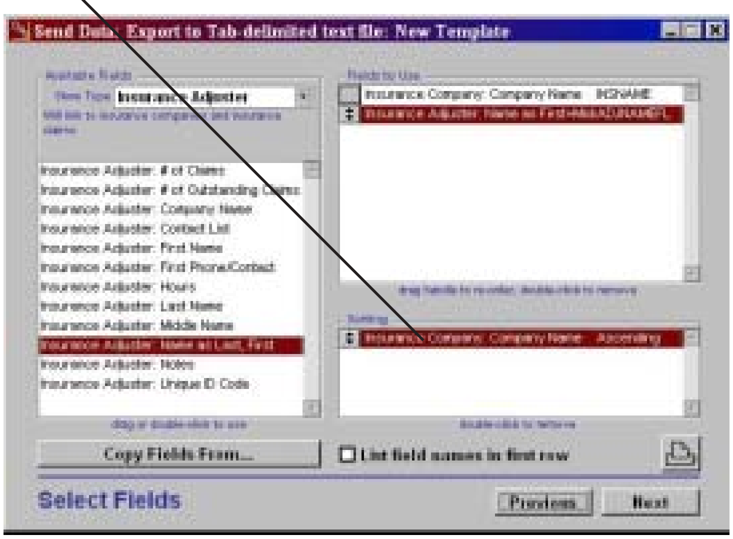
Without any linking, your output would include fields from every adjuster combined with every insurance company, like that in *Figure 2*.

But this output wouldn't be very useful. If John Smith works for *Acme HealthCare* and Jane Doe works for *Western Mutual*, output like figure 3 is much more useful.

Now, instead of six lines output you have two. But what happened to *U.S. Indemnity*? Its absence from *Figure 3* illustrates a very important effect of automatic linking: records of one type without a matching record of the other type are automatically removed from the output (with one exception, explained below). The reason for this may not be immediately obvious, but it will become clear when after you've set up a couple of output templates. Most of the time, you'll find you that when you want fields from two linked data types, you don't want to include records of one type with no matching record of the other type. You can tell which data types are automatically linked because the filter menus will list all the linked data types. For example, adjusters and insurance companies are automatically linked, because each adjuster can be assigned to a particular insurance company. If you use only an adjuster field the adjusters' filter menu will start with "All Adjusters", but if you also use an insurance company field the adjusters' filter menu will automatically start with "Adjusters for selected Insurance Companies."

We won't list all the possible linkages here, because, in a basic installation of *CaseMgr,* there are over 40 different linked combinations. For example, medical providers are automatically linked to medical expenses if you include fields from both. One special case deserving mention is that of attorneys, because they may be linked to either clients or non-client parties, both of which can appear in the same template. For this reason, we have included two sets of attorney fields, one named "Attorneys" and another named "Opposing Attorneys." Using either without any client or non-client party fields included results in the same output. The only difference between these two options is how they automatically link when you include client or non-client party fields in the same template.

Primary Sort Field



There is one case in which you can include all items of a particular data type, whether or not they have matching records in a linked data type: the data type of the field being used as the primary sort. This field is chosen when fields are selected on the Send/Merge window (by default it's the first field selected, but this can be changed).

When performing the send/merge, the name (just left of the filter menu) of the primary sort data type will appear in bold, and is first in the list of pop-ups. Its pop-up menu will include options both with and without the phrase "*... for selected ...*" If you were to sort *by Insurance Company name*, and then select "*All Insurance Companies*" and "*Adjusters for selected Insurance Companies*" in the pop-up filter menus, your output would look something like *Figure 4* (database pundits playfully call this routine a "left outer join").

John Smith —	Acme HealthCare
	U.S. Indemnity
Jane Doe —	Western Mutual

Figure 4- with auto linking & all ins. co's selected

This option comes in handy when you plan to format your output as a hierarchical list, and you want to list each “parent” records whether or not it has any matching “child” records.

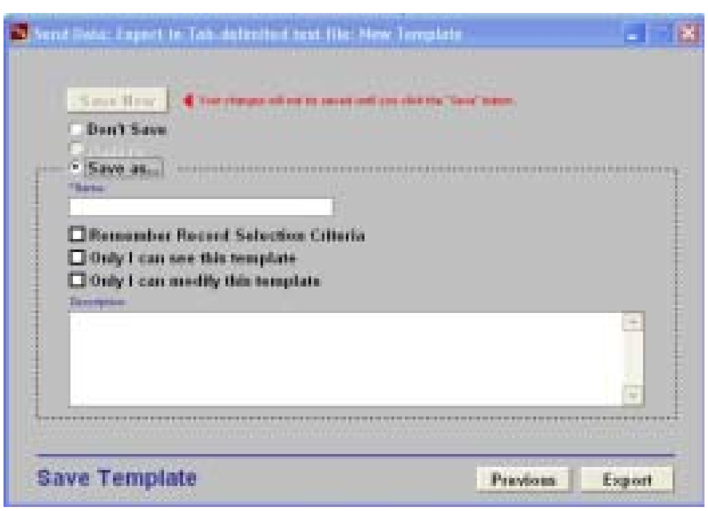
One of the options (in the form of a checkbox) on the *Send Data* window labeled *Select Data to Use*, is “No Duplicates”. Some selections may produce multiple identical records. This option shows only the first of such identical record.

No Duplicates option

When you have made selections in all of the filter menus, and entered values for any “user prompt” fields, you’re ready to proceed with the next step. If you’re creating a new export template or you’ve modified a previously-saved template (changing the filter menus doesn’t count as modifying it unless it had been saved with “remember data selection criteria” checked, as described below), the next step will be saving your template. The “Next” button will take you to that step. Otherwise, you’re ready to export; in place of the “Next” button will be an “Export” button.

Save Export Template

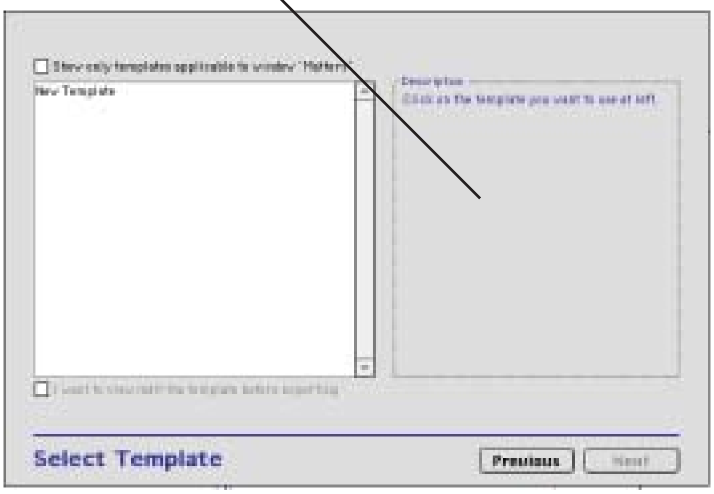
You always have the option of not saving your new or changed template, probably a useful option if you know this isn’t an export you’re likely to repeat. If you choose to save it, you have a few choices to make.



If you’ve made changes to an existing template, you’ll have the choice of re-saving the revised template with your changes, using the current name and description, or saving the modified template with a new name. If you re-save an existing template, you won’t be able to change any of the other save options described below, so if you want to change the template’s description, for example, you’ll want to save it as a new template. If the template you have modified was created by someone else, and they marked it “Only I can modify this template,” you won’t have the option of simply re-saving it. To save your changes, you’ll have to give the template a new name.

The name you give your template may contain up to 40 characters, and may contain only alpha characters and numerals. It’s strongly recommended that you enter a description in the field provided, outlining the purpose, the contents and, if you choose to store the data selection criteria with the template, a description of that as well. This is particularly important for shared templates, as other users will appreciate knowing exactly what this template offers them. The description may be up to six hundred twenty-seven characters long and still fit into the seventeen-line description box in the “Select Template” screen of the “Send Data” window as shown here.

Description Box

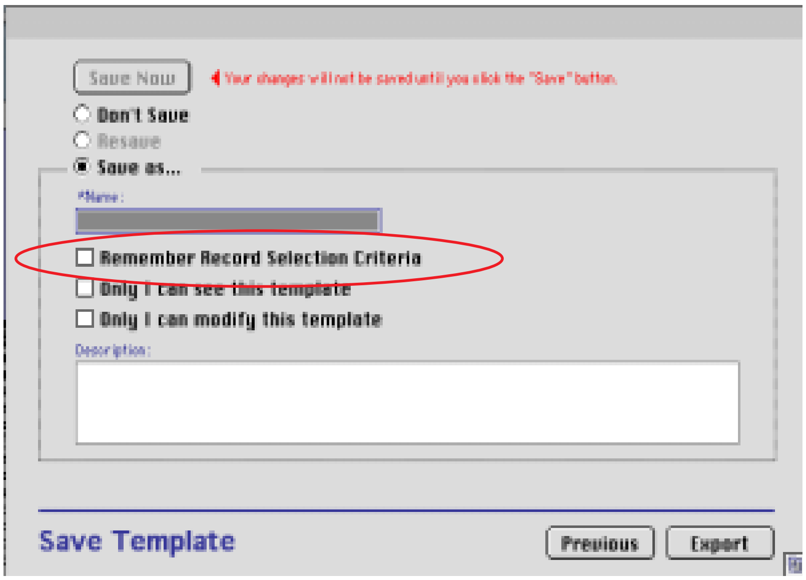


Send Data window

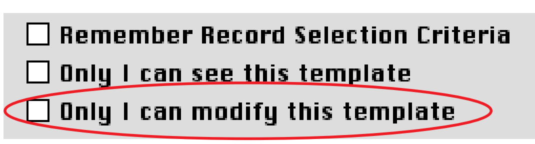
For some templates, you might want to automatically use the same data selection criteria each time. For example, if you’ve created a template called “Today’s appointments,” you’ll want it to reuse your data selection (which will presumably specify appointments for today’s date only) each time you use it. On the other hand, if your template is called “Matter’s Document list” you’ll likely want the option of selecting a different matter each time you use the template. If you check the “remember data selection criteria” box, the next time you select the template (in the *Select Template* window as described above) the **Next** button will immediately be replaced by an **Export** button, allowing you to skip rest of the steps. If you want to view or change the data selection criteria in the future, simply check the box marked “I want to view/edit the template before exporting” on the

Select Template window. You'll see the **Export** button immediately replaced by the **Next** button.

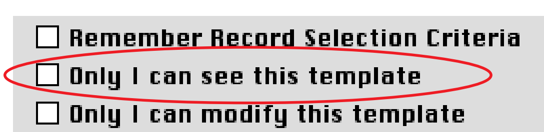
Note that if you check the "Remember Record Selection Criteria" box, and you have referenced a list window in your selection criteria, the list window's *current* state will be used as long as that list window is open. This means that if you change the list window's filter setting and then reexport using the same template, it will use the new filter configuration to export. However, once that list window has been closed (even if you open the same list again), the template will use the filter settings of that list window at the time you had last saved the template.

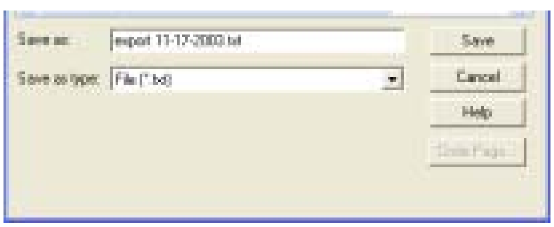


When saving your template, you may specify that "Only I can modify this template," so no other users can save changes to your template. Other users will still be able to view and edit the specifications of the template, but they won't be able to re-save their changes with the same name. They will have the option of assigning a new name and saving their changes as a new template. There's another important aspect of marking a template as "Only I can modify…" It prevents another user from deleting this template. Templates are normally deleted by right-clicking the name of the template in the "Select Template" window and then selecting "Delete" from the menu. There is no Menu bar option to delete a template.



You may also specify that no other users are permitted to see your template at all. You might want to do this for privacy or security purposes, or even for the sake of other users — if your system has many users, and all create shared





templates that are of little interest to most users, each user will see a list of available templates crowded with irrelevant options.

A final note regarding naming saved templates: shared templates must be given a name unique with respect to the entire system, including other users' private templates. Otherwise, other users could see a list of output templates including duplicate names. If you designate your template as visible only to yourself, however, the name you give it needs to be unique only with respect to shared templates and your own private templates.

After you have saved (or declined to save) your template, you are ready to export your data. After clicking the "Export" button, you will be prompted to enter a file name and disk location for your stored data. Remember that each type of data is associated with a particular three-letter file extension, for example, Excel files typically end with the ".xls" extension. You may specify a different extension, but if you *don't* specify any extension in the file name, the appropriate extension will be added automatically.

After your exported data file has been written, the "Send Data" window will automatically close. If you want it to stay open, hold down the shift key while clicking the "Export" button.