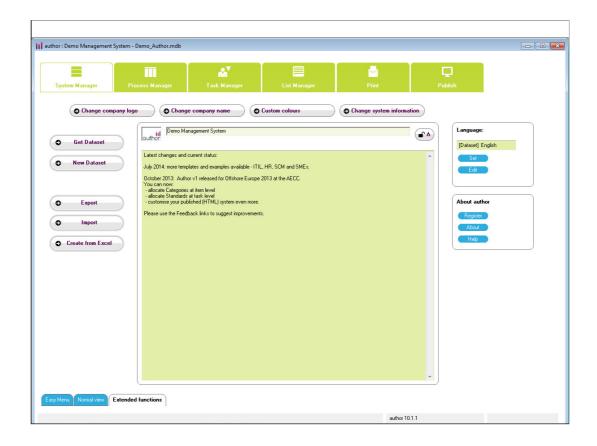


"Exporting Data from / Importing Data into a Dataset"



"Exporting Data from a Dataset"



Go to the **System Manager** tab / "**Extended functions**" and select the "**Export**" button.

| II Export | | × |
|--|--------------------------------|--|
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| Tick None | ∑ H | evisions |

Select the required process(es).

On the right hand side of the screen, tick the required **elements** which are to be exported along with the processes. Only those which are associated with the selected processes will be exported.

(This is also a good way to remove redundant data from a dataset).

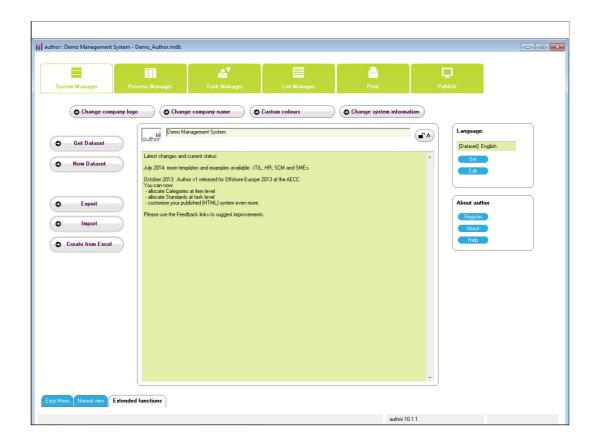
If a selected process has **sub-processes**, you will be asked if you want to export the sub-processes as well.

NB if you want to export (for example) all the **document entries** in the Document Register, but you do not want to export any processes, tick the **Documents** box only.

Click "Export" to create a new dataset.

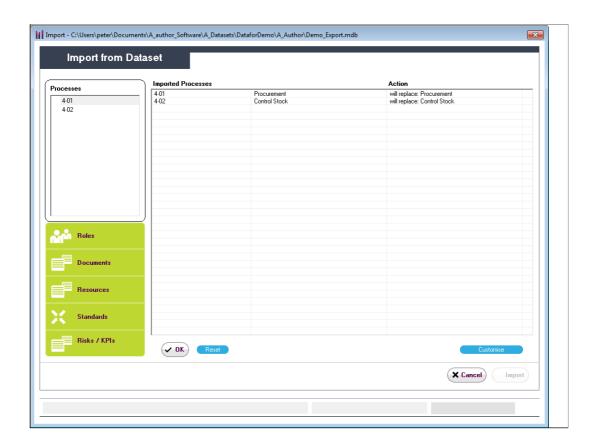


"Importing Data into a Dataset"



Go to the **System Manager** tab / "**Extended functions**" and select the "**Import**" button.

Browse to the required dataset.

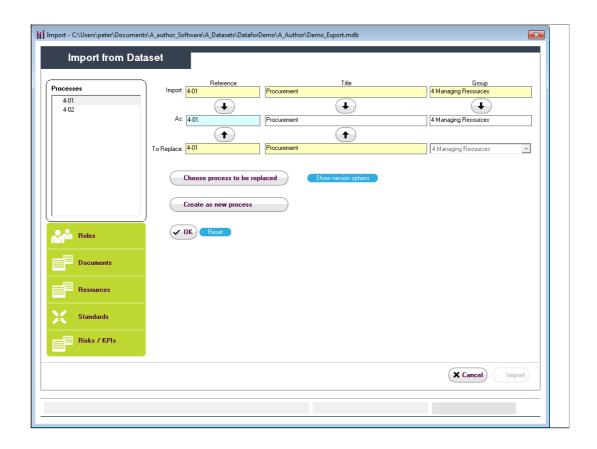


The tabs on the left hand side of the screen show the data elements present in the source dataset.

All **processes** in the source dataset are listed along with the default action for each.

Click "*OK*" to accept all default actions, or click "*Customise*" to define the action to be applied to <u>each</u> incoming process in turn.

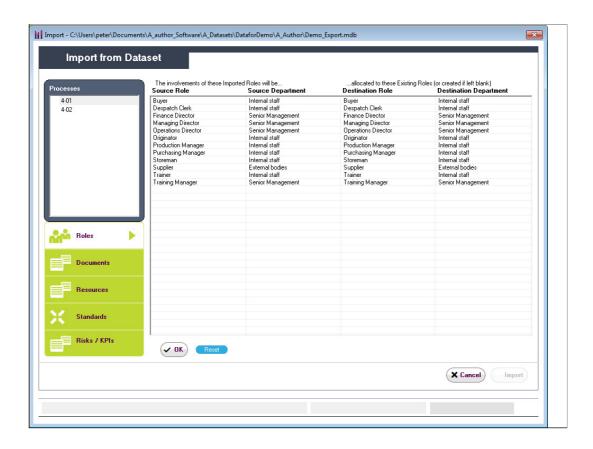
NB you must "**OK**" every screen / tab on the left hand side of the screen before you can complete the Import.



(Processes)

If you click "Customise":

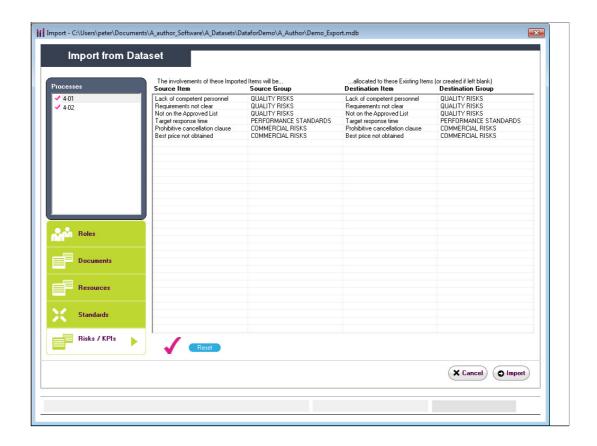
For each process you select, the system checks the "destination" dataset for a matching Process Reference. To see the full range of options, see the screen instructions and/or refer to the User Guide (in **System Manager** / "**Help**")



(Roles etc)

To change the stated action for any role, click on the relevant line and select the alternative action from the displayed list.

NB this can be useful if you want to merge roles.



When all screens have been "OK"ed, you can click the **Import** button.



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