PURPOSE:

To document the different approaches to exporting data from Cadence.

Using a Smart Query:

- After navigating to the smart query, the results can be exported in two different ways:
 - The first is to export it from the Results section on the Smart Query page. The user will need to select "click here to process the query and view the results", then select the Microsoft Excel icon and select which file format to export the data to. Note this will process the query with the last filter options selected, it is recommended to check the filters every time before running and exporting results. Exporting the query results using this method will **only** export the first 500 rows.

	nor Relations - Busines nstituent	s Information of Alum		Owner: Source:	S26\vbennae79525 Donor Relations - E		n of Alumni by Majo	OData: Get C	Data link			
Category:				Description:	Restricted to Alumi	ni. Filterable on Ma	jor.					
				Others can modify:	Yes							
												-
	r 500 records found		rows are sh	own.)							नि	Jan .
Results (Ove			rows are sh	own.)								Download to C
		4	First name		. Related Constit	Relationships\R	Job Title	Relationships\J	Preferred Email	Preferred Phon		Download to C
I4 - € Page	1 of 10 🕨 🖡	Maiden name			Related Constit Bank of Americ		Job Title Asst VP/Bankin		Preferred Email srjenk@aol.com	Preferred Phon (205) 470-5988		Download to C
IN A Page	1 of 10 ▶ ↓ Last/Organizati	Maiden name Si	First name	Primary Addres. Scott Jenkins		Yes	Asst VP/Bankin			(205) 470-5988	Addres 🗷	Download to C Download to X

 The second is to export from the pop-up that comes up when 'Edit Definition' is selected. After selecting the desired filters, the user should navigate to the Results tab. After the results have loaded, users can select to export to either CSV or Excel. Using this method **all** results will be exported.

Assign permissions Type Shortcuts Assign permissions Add this page to Add this page to	Constituent	Source: Description: Others can modify:	Donor Relations - Bus Restricted to Alumni. I Yes			Major	
Edit Smart Query - Donor Relation	Business Information of Alumni by Major	Edit Sm	art Query - Donor Rela	tions - Business	Information o	f Alumni by Maj	or
		3e Param	eters Results Set save	options			
Parameters Results Set save option		Result	Over 500 records four	d. Only the first	500 rows are sh	own.)	
Major		Loo	kup ID Last/Organizati.	. Maiden name	First name	Primary Addres	Related Consti
		T10058	6 Jenkins		Scott	Scott Jenkins	Bank of Americ
Marketing *		T10064	4 Durst		Thomas	Tod Durst and	PolyQuest, Inc.
Major: *		T10112	9 Brown	McAlister	Brooks	Brooks Brown a	Schering-Ploug
		T10153	Pilgrim	Story	Lynn	Lynn Pilgrim an	Clemson Unive
		T10165	4 Teuteberg	Adams	Christie	Christie Teuteb	K-Mart Corp
		T10166	3 Vernier	Vernier	Tori	Tori Vernier	Gte Foundation
		T10188	4 Hardin		William	Bill Hardin	UBS Financial S
		T10188			Sam	Sam White, Jr	
		T10188			Sam	Sam White, Jr	
		T10228		Peck	Katherine	Kathy Price	Kraft Foods Inc
		T10230			Eric	Eric Masna and	
		T10230			Eric	Eric Masna and	
		T10241		Hinnant	Lori	Lori Fuqua and	
		T10261		Godshall	Julie	Julie Brown an	
		T10266		Daly	Kathleen	Kathleen Shand	
		T10279		Hecht	Margaret	Margaret Myric	
		T10279		Hecht	Margaret	Margaret Myric	
		T10306			Charles	Bonnie Mauney	
		4				Contraction Contraction	Contraction Co
		14 4					
		Exp	ort to CSV 📧 Export to Exe	el 🗟 Add to shor	tcuts		

Using a Data List:

- We have a variety of different data lists in Cadence, to showcase how to export data from them this document will use the Alumni Listing page found under the Constituent functional area.
 - \circ $\;$ After selecting the desired filters user can select Apply or the 'click here' link to load the

lumni Listing					
Results 🗵 More*					
College equal to:	Major equal to	Financial Management	Invalid Address equal to:	V Invalid Email equal to:	Y Apply
4					

• Once the data list has finished loading users should then select 'More'. This will give options to choose to download the results to CSV or XLSX.

Alumni Listing				
College equal Complete to the College equal Coll	✓ Major eq	ual to: Financia	I Management	 Invalid Addres
Name Maide Restore grid d		City	State	ZIP

Using an Export:

- There are three different types of exports: ad-hoc query, smart query instance, and export
 definition. Ad-hoc query & smart query instance exports will export data from an existing ad-hoc
 query or smart query instance, the records & fields exported are the same found in the adhoc/smart query. These are used when complex queries time out while processing the results.
 Export definition exports use an export definition to define the fields to be exported, and a
 selection must be provided to determine which records to export the data for. All types of
 exports can be exported the same way:
 - Exports can be found on the Export page under the Administration functional area.
 Users can use the search box to find the specific export they would like to use and then select the blue hyperlink to go to the specified export page. For this document we will be using 'An Export for All Ethnicities on One Row' as an example.

Sec	arch 🕒 Columns 🔹 🔚 Save list 🔯 Open list 🐺 Clear al	filters	
	Name 🔺	D	Export type
	A Postal Mail Export for - Individuals and Combined Households		Export definition
	Advancement Services - Constituent Record IDs export	This	Export definition
	All alumni with the primary class 1971	All	Export definition
	Alumni Relations - Constituents by Clemson Club	Exp	Smart query instanc
	Alumni Relations - Living Alumni Connection Scores by Primary Class Year Export	Exp	Smart query instanc
	Alumni Relations - Model Scores by Constituent	Exp	Smart query instanc
	Alumni Relations - RFM by Clemson Club/Area	Exp	Export definition
	An Export for All Ethnicities on One Row	Exp	Export definition

 On the Exports page users should select 'Start process' for the export to generate the file, if this an ad-hoc/smart query instance type export it may take longer depending on the complexity of the query.

Tasks Start process	An Export for All Ethnicities on	One Row - Export	
 Edit process Set format options 	Name: An Export for All Ethnicities on One Row Description: Export to get up to 5 Ethnicities in a single row	Query name\Export definition: An Export for All Eth Export type: Export definition	nicities
Generate WSF Create job schedule			

 After the export has finished processing users should select 'Download Output' where they can select to download the data to either a CSV or XLSX, which will download all results, or they can select 'Multiple Files'.

Name:	An Export for All Ethnicities on One	e Row Que	ery name\Export defini	ition: An Export for All Ethnicities on One Row
Description:	Export to get up to 5 Ethnicities in	a single row Exp	ort type:	Export definition
Recent Status	History Job Schedules			
Recent sta	tus 🗧 Download output 🔹 🛙	2		
Status:	Download to CSV			
Status: Status messa				
		Server name:	s26acrm07	web04b
Status messa	ge 🖵 Download to XLSX	Server name: Total records process		web04b
Status messa Started by:	ge 🖵 Download to XLSX		ed: 472	web04b

 If 'Multiple Files' is selected a pop-up will come up that requires the user to select the output field on which to create multiple files, only fields found in the ad-hoc/smart query/export definition are available to choose from. For example, if Lookup ID were selected a zip folder would be downloaded that contains a file for each Lookup ID found when exporting the data.

Details Preview		
Create one file per:	Lookup ID	~
File prefix:		
Export format:	csv	~

Using a Report:

- There are different reports available in Cadence, for this document the 'FYFRS Snapshot Report' will be used as an example.
 - After navigating to the report page users can select what filters they'd like to use then choose 'View report' to have the report process. Some reports will start processing with pre-defined filters when the user navigates to the page, such as the US News Report.

🧊 Fiscal Ye	ear Fundraising Summary Snapsho	t Report	
Interval	February 15, 2024 - 2023-07-01 - 2024-02-15 🗸	College All	View Report
Special initiative	All	First sort Fund lookup ID 🗸	
Second sort	Amount 🗸	Third sort Revenue date 🗸	

• Once the report has finished loading; users should select the 'Save Icon' to choose what file type to export the report to.

🇊 Fiscal Ye	ear Fundraising Summary	Snapsh	not Report				
Interval Special initiative Second sort	February 15, 2024 - 2023-07-01 - 2024-02 All Amount	2-15 💌	College All First sort Fund loo Third sort Revenue		v v		View Report
14 4 1	of 2 ? 🕨 🚺 Find N	lext	•	_			
			Word Excel			Fiscal Year Fund Raising Summ	ary Snaps
			PowerPoint PDF			February 15, 2024 - 2023-07-01 - 2	2024-02-15
			TIFF file MHTML (web archive)		February 15, 2024 - 2023-07-01 -	- 2024-02-15	
			CSV (comma delimited)		All		
			XML file with report data Data Feed	tive	All Europhookup ID		

Using a Power List:

- Some lists have extra functionality that allow users to filter on all headers, add/remove columns when reviewing data. For this document we will use the Bio Information Power List found on an Event page as an example.
 - Users can choose to filter on any column by clicking on the Funnel Icon (example below in green). Filters are sticky so don't forget to deselect or choose 'Clear All Filters' to see all available data before exports.
 - Specific users can create/save filters and request data be presented/formatted in customized ways.

 Like data lists, once the power list has finished loading users should then select 'More'. This will give options to choose to download the results to CSV or XLSX.

