

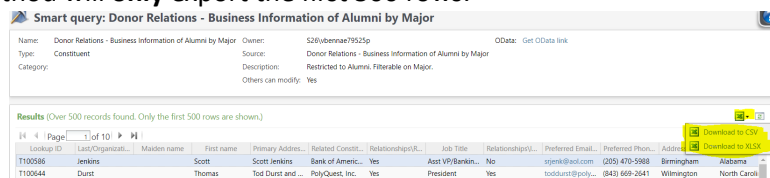
User Guide on Exporting Data from Cadence

PURPOSE:

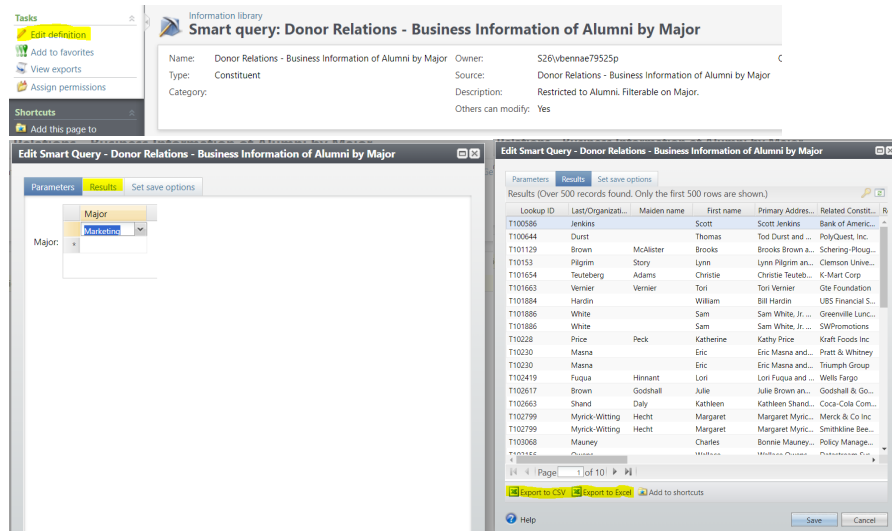
To document the different approaches to exporting data from Cadence.

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.

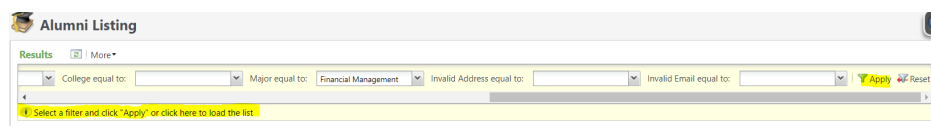


- The second is to export from the pop-up that comes up when 'Edit Definition' is selected. After selecting the desired filters, the user should navigate to the Results tab. After the results have loaded, users can select to export to either CSV or Excel. Using this method **all** results will be exported.



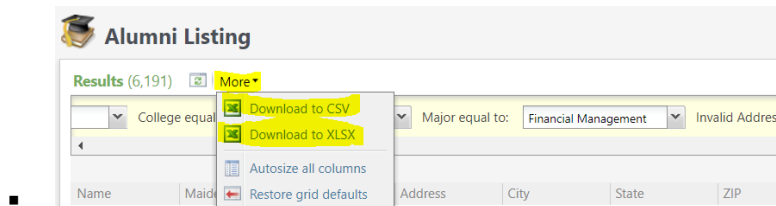
Using a Data List:

- 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.
 - After selecting the desired filters user can select Apply or the 'click here' link to load the list.



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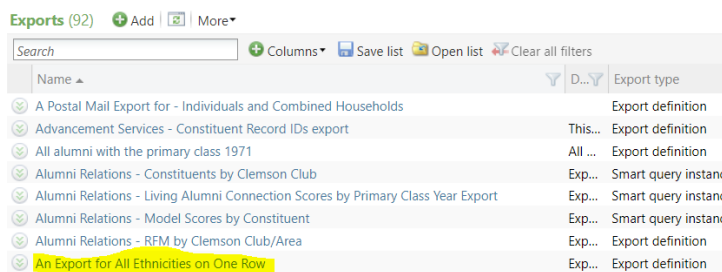
- Once the data list has finished loading users should then select 'More'. This will give options to choose to download the results to CSV or XLSX.



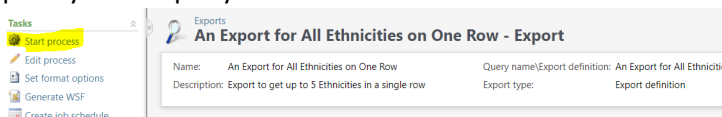
Using an Export:

- 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 ad-hoc/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:

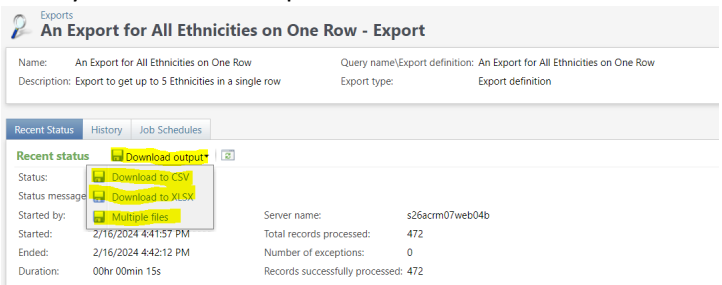
- Exports can be found on the Export page under the Administration functional area. Users can use the search box to find the specific export they would like to use and then select the blue hyperlink to go to the specified export page. For this document we will be using 'An Export for All Ethnicities on One Row' as an example.



- 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.

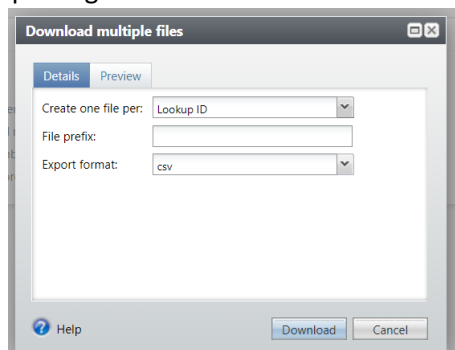


- After the export has finished processing users should select 'Download Output' where they can select to download the data to either a CSV or XLSX, which will download all results, or they can select 'Multiple Files'.



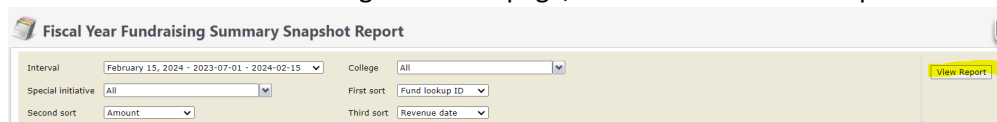
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- If 'Multiple Files' is selected a pop-up will come up that requires the user to select the output field on which to create multiple files, only fields found in the ad-hoc/smart query/export definition are available to choose from. For example, if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

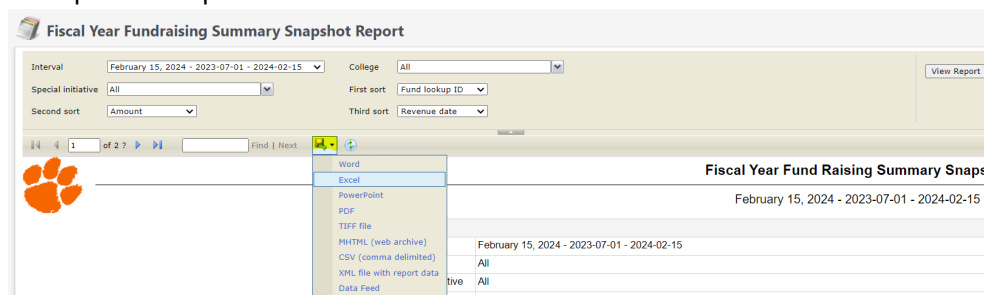


Using a Report:

- 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.



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



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.

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- 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.

The screenshot displays the Cadence interface for an event titled "CJ Test Gala". At the top, there are two progress indicators: "Event expenses" and "Amount paid: \$0.00 0% of budget", both showing 0% completion. Below this, the event details are listed: Start date (11/11/2023 - 7:00 PM), End date (11/11/2023 - 11:00 PM), Location, Room/Unit (10001731), Contact (Ms. Cynthia J. Smith 2024), Coordinator, and Category (Other). The status is marked as "Active".

The interface includes a navigation menu with tabs for "Invitations", "Lodging Options", "Registration Type", "Registrations", "Event Details", and "Registrant Details". Under "Registrant Details", there are sub-tabs for "All Registrants", "Registrants", "Options", "Restrictions", "Preferences", "Bio Information", and "Archive".

The "Registrants (5)" section is active, showing a search bar and a list of registrants with columns for "Name", "Guest Names", and "Committee Memberships". The list includes:

- Heather R. Dro... Guest of Heather R. Dromm
- Mr. Caleb Z. Hi... Mr. James L. Huff 2005; Mrs. Emily Hilley
- Mrs. Sharon M... Clemson University Foundation Order of ...
- Ms. Liza C. Gra... President's Leadership Institute (PLI)
- Ms. Teneil L. ...