

Exporting Record Data

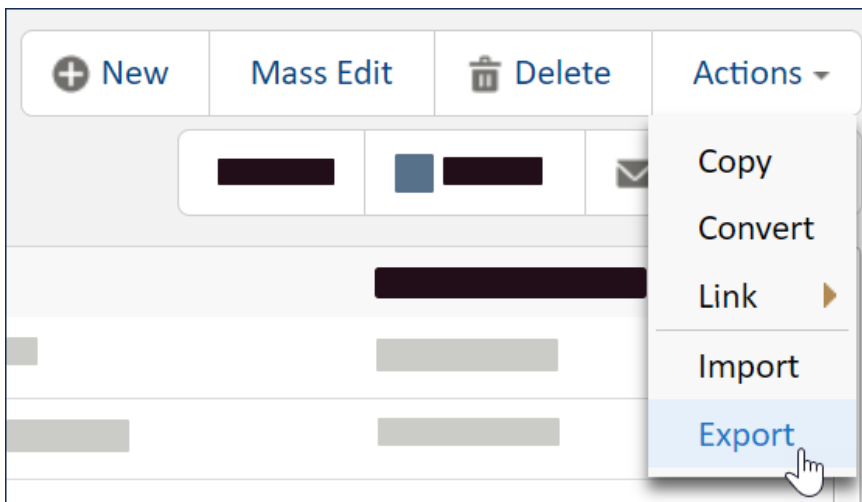
You can export data from one or many records into several formats: text file, Excel spreadsheet, XML file, or JSON file. This can be useful for reporting data to others outside the system, or for adding or correcting a large amount of data. You can also export record data in order to create a template file which can be used to determine the appropriate format for importing data.

Exporting Data


You can export records you manually selected in the table, records matching a saved search, or all records in the table. If you want to use a saved search, create the search before you begin the steps below.

To export data from a table:

1. Navigate to the table that holds the data you want to export.
2. If you want to export certain records that don't share useful search criteria, select the checkbox for each record you want to export. Otherwise, you can use a saved search later, or export all the records in the table.
3. Hover over Actions on the action bar and click Export. The Export wizard opens.



4. On the Destination tab, select where you want to save the export file. You can export to your local hard drive or the home directory on the server.
5. On the Data Format tab, select the format for the export file.
 - a. Tab-delimited text: Exports a text file containing tabs that separate information into one record per line, similar to an Excel file.
 - b. Other text file: Exports a text file where you can choose which characters separate and enclose each field in a record.
 - c. Excel'97 (.xls) spreadsheet: Exports an Excel file in .xls format. By default, the maximum file size is 200 MB, but it can be changed in the [Maximum XLS Size to Export](#) global variable.

- d. Excel'2007+ (.xlsx) spreadsheet: Exports an Excel file in .xlsx format. By default, the maximum file size is 200 MB, but it can be changed in the [Maximum XLS Size to Export](#) global variable.
 - e. XML file: Exports an XML file. Field and column labels are stored within the <metadata> element of the file.
 - f. JSON: Exports a JSON file. Each record is stored as an object in the JSON array.
6. On the Options tab, choose which records you want to export:
 - Only selected records. Export only the records selected in the table view. If you didn't select any before clicking Export, this option is disabled.
 - Only records matching search. Export any records in the table that match the selected saved search. You must select an existing saved search, or exit the wizard, create a saved search, and repeat the previous steps.
 - All records. Export every record in the table.
 7. Choose whether to export table labels.
 8. If you want to include attached files, set "Export files to folders" to Yes. The exported files are organized into folders for each exported record ID.
 9. If you chose to include attached files, you can optionally select a list field to organize the record folders into groups. For example, you could group records by status. To do so, select a field from the drop-down under "Store files in folders named after a list field value." The drop-down only includes supported field types.
 10. Choose whether to convert HTML and XML content into plain text. The HTML/XML option strips formatting tags out and exports only the text content.
 11. Select the time zone to use for date/time fields.
 12. Choose which fields to include in your export:
 - All. Export all fields you have permission to view.
 - Use this View. Export all fields included in the selected table view. You can also edit the selected view from here to make changes.
-  When you export using a view, the file looks just like the table view: values that are too long are cut off. To avoid this, use one of the other options or adjust the width settings in the view you want to use.
- These fields only. Manually select the fields you want to export from a list of the table's fields. You can clear or select every field using the buttons at the bottom of the list.
13. Click Finish to complete your export. When the file is ready, a link appears for you to download the file.

To export data from multiple tables:

1. Click the Setup gear in the top-right corner and click Export.
2. On the Destination tab, select where you want to save the export file. You can export to your local hard drive, TMP directory on the server, or home directory on the server.
3. On the Data Format tab, select the format for the export file.
4. On the Options tab:

- a. Choose whether to zip downloaded files. This compresses all attached files into one .zip file.
- b. Choose whether to export all versions of each attachment. If you don't select this option, only the most recent version is exported.
- c. Choose whether to convert HTML and XML-formatted text into plain text. This removes HTML and XML tags and exports only the content.
- d. Select the tables you want to export. You can select All to export all the table data in the KB, or you can select the Tables option and press the Ctrl key to select multiple tables from the list.