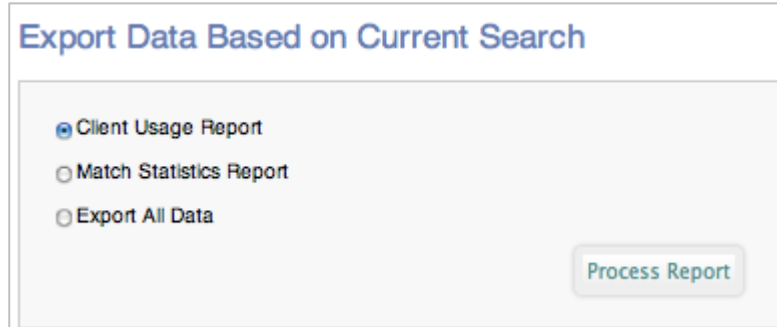


Instructions for DONORSCAPE® Webinar Level 4

Advanced Data Segmentation: Enhanced Querying With Full Export

The Export All Data function creates a file for download that contains a zip file of all information for all prospects in a selected search. The export is a collection of pipe-delimited (|) text files containing information that can be linked by the Prospect ID number. The export will also contain a layout file describing the data files. Reports are exported to .txt files, which are emailed to you.

1. Export All Data for a Given Search
 - A. Isolate the records that you want to export data on through the Search functions.
 - B. Click the navigation bar (top of screen) to go to the **Generate Insights** page. Admin reports are available at the bottom of the screen:




- C. Select **Export All Data**.
 - D. Click **Process Report**.

An email will be sent when the report is complete. A **Download Report** button will appear on the **Explore Prospects** page when the report is available. The report is available for a single download and will remain available for three days.

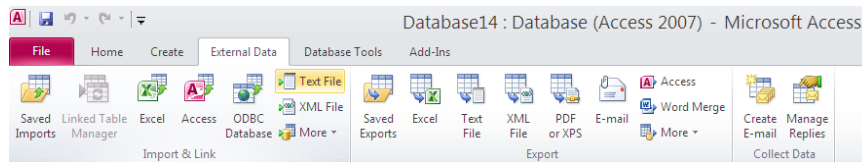
2. Download the completed report
 - A. Open a new, blank folder on your desktop or somewhere else you can find easily
 - B. Click "Download" for the report

- C. Extract all of the text files into the new folder you created.
- 3. Determine which text files contain the data you want to link. All files you select must have some data in them.
- 4. Open a software program that allows joining tables and databases such as MS Access, File Marker, or Open Office Base (<http://www.openoffice.org/product/base.html>)
- 5. Create a Blank database.
- 6. Import the DONORSCAPE® text files into your blank database

A. On the **External Data** tab, in the **Import** group, click **Text File**. 

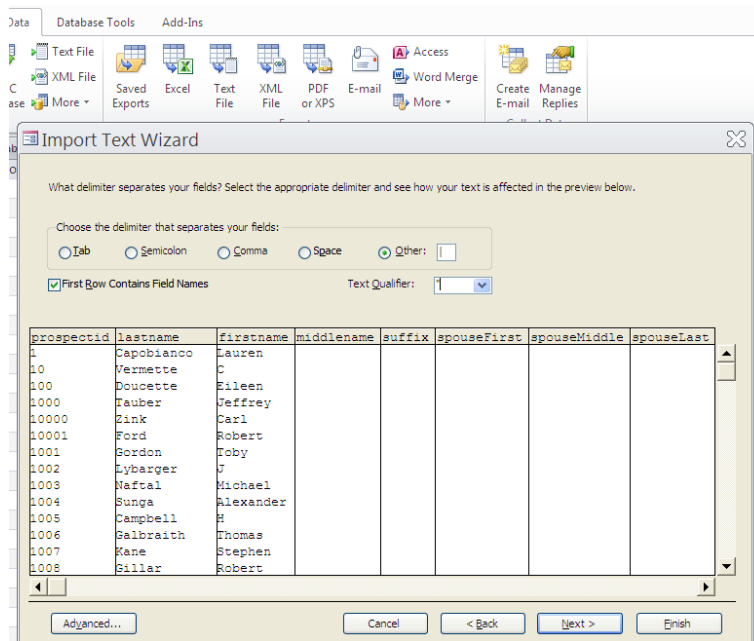
The **Import** commands are available only when a database is open.

B. In the **Get External Data - Text File** dialog box, in the **File name** box, type the name of the source file.



- C. Specify how you want to store the imported data.
 - i. Select **Import the source data into a new table in the current database**. You will be prompted to name this table later.
 - ii. Click **OK**. Access scans the contents of the file and recommends how the file should be organized.
- D. Specify that you want the data parsed by the **Delimited** option
 - i. Click **Next**
- E. Click the **Other** radio button, highlight the empty box, and type in the pipe (|) key located above the Enter key (the same key as "\"). Specify that text is separated by double quotes (").

F. Select that the First Row contains Field Names.



G. Select the **Advanced** button in the bottom left corner and click on the Data Type column. Specify the Data Type of **Long Integer** for all fields related to dollars and **Text** for all other fields (especially ProspectID and Zip Codes). Click **OK**.

H. Click **Next**

I. Check that Data Types are correct. Click **Next**

J. Select **No Primary Key**

K. Access displays the final page of the wizard. If you are importing records into a new table, specify a name for the destination table. In the **Import to Table** box, type a name for the table. If the table already exists, a prompt asks you whether you want to overwrite the existing contents of the table. Click **Yes** to continue or **No** to specify a different name for the destination table.

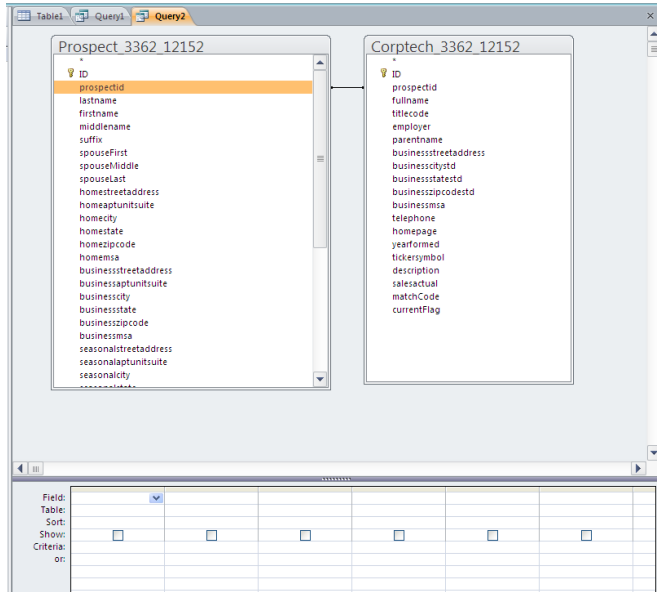
L. Click **Finish** to import the data.

Access attempts to import the data. If any of the data is imported, the wizard displays a dialog box that tells you the status of the import operation. Conversely, if the operation fails, Access displays the error message **An error occurred trying to import file**.

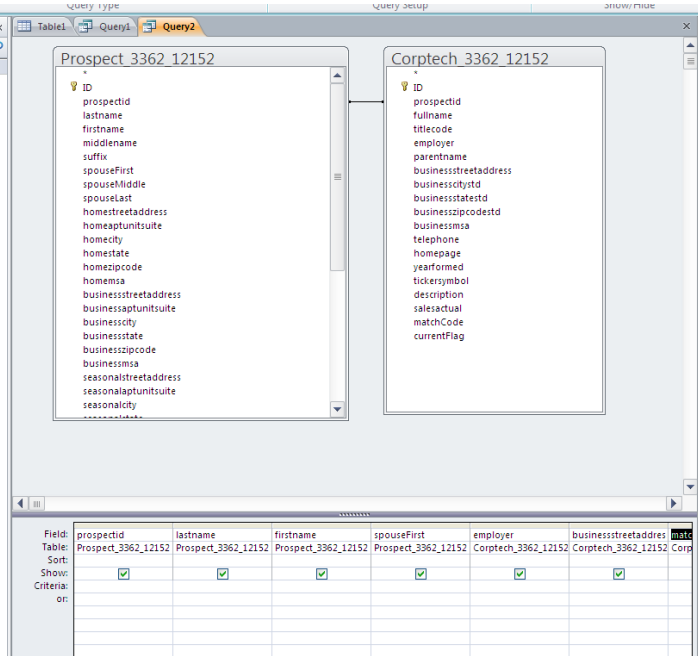
If some columns are too long for Access to successfully import you will also receive an error report. In most cases this will not impact your overall project as the error files will be long, descriptive fields such as Biography.

7. Open the destination table in Datasheet view. Compare the data in the table with the source file, and make sure the data appears to be correct.

8. Repeat with remaining tables
9. Join the tables together
 - A. Click **Create** then **Query Design**
 - B. Double Click the tables you wish to join
 - C. Drag the ProspectID field from the first table to the ProspectID field of all other tables you wish to join together



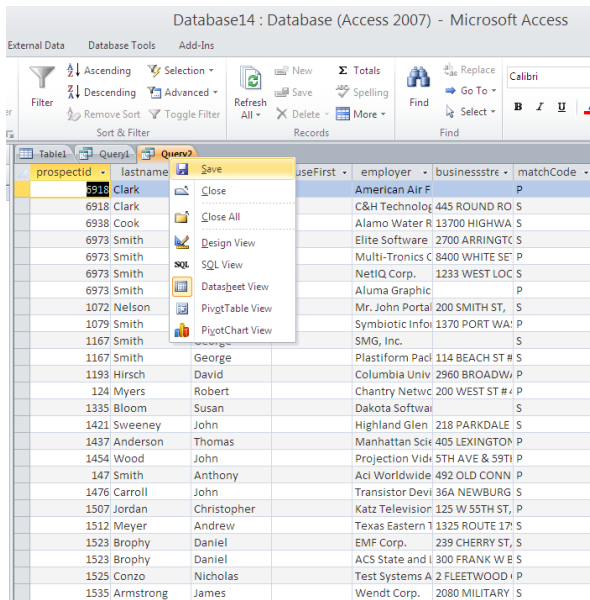
- D. Double click the field names of all fields you wish to have in your final table.



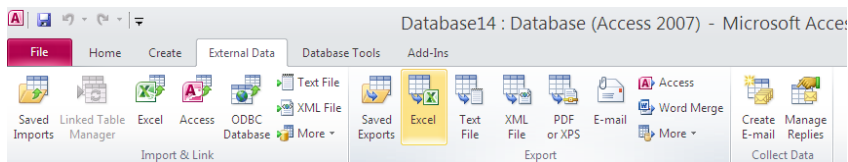
ProspectID must be one of the fields.

E. Click **Run** or **View** in the upper left corner to populate your query table

F. Save the Query



G. Under **External Data** click **Excel Export**



H. Click **OK**