

PIRS Exporting Data

Introduction

From the PIRS program, you can easily export table view data for use in 3rd party programs such as Top Producer, ACT! or Microsoft Office products, including Excel, Word, and Access. Taking data generated in PIRS and using this data in a 3rd party program is accomplished in 2 steps – the first step involves exporting a data file from PIRS; the 2nd step involves importing the data into the 3rd party program. In this tutorial we'll take a look at how these steps are accomplished.

Switch First & Last Names on Export & Labels

On the PIRS main menu, from File → Preferences, there is an option to “Switch first and last names on Export data and labels”. This setting is available, because the name fields that appear in table view are as they come from the tax roll which is last name first. If you always want your exported data and mailing labels to display the first name, then the last name, you should check this preference setting.

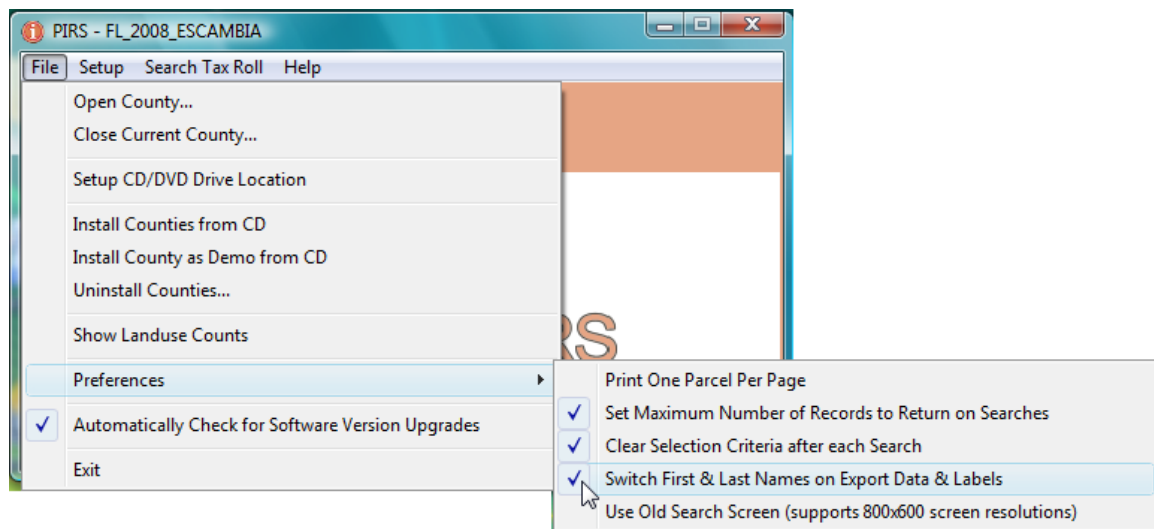


Figure 1

Exporting All Fields from PIRS

In table view, the columns display data fields of information. You have the choice to export all data fields; or to export just certain, selected data fields. The easiest method is to export all the data fields from the Table View.

To Export all the information that displays in Table View, choose the Export menu item at the top of the screen and then follow along to the right with the cursor and select **Data From Table View → Export All Records → Export All Columns → Quoted Comma Delimited**.

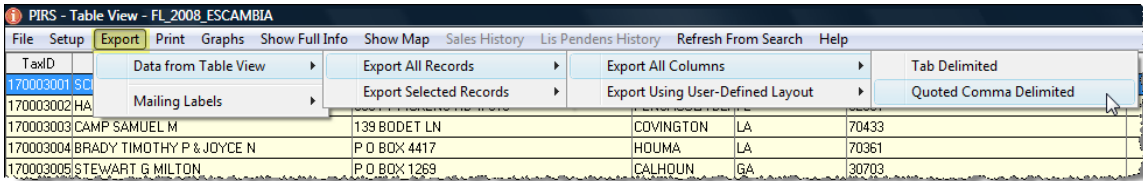


Figure 2

A directory window will appear providing the opportunity to name the text file you are creating and to choose the location to save this file. By default the file is stored in the Export folder which is a sub folder of the PIRS program folder with a file extension of .TXT. However you can navigate and save this file in any location you desire, such as My Documents. For this tutorial, we'll name the export file 'export_1' and click Save in the default location.

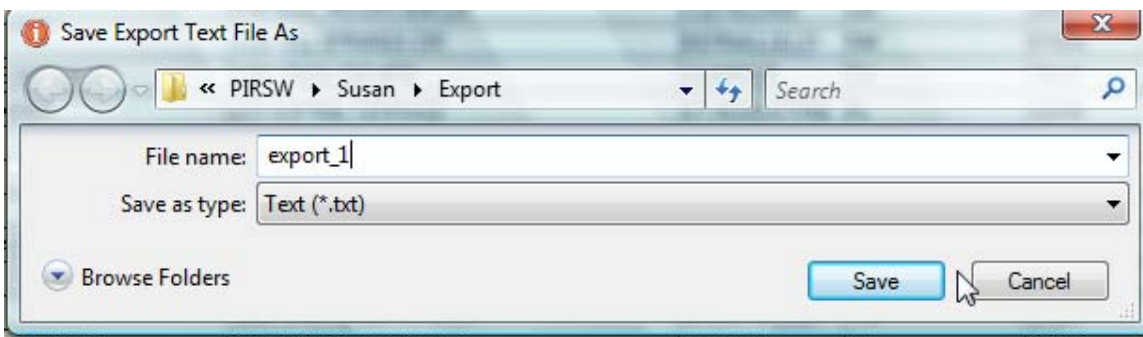


Figure 3

Importing All Fields into 3rd Party Software

I'm now ready to open 3rd party software application and follow that program's importing instructions. For this example, we've opened Microsoft Office Excel 2007 and will follow the import procedure of choosing Data from the top menu bar, then "From Text".

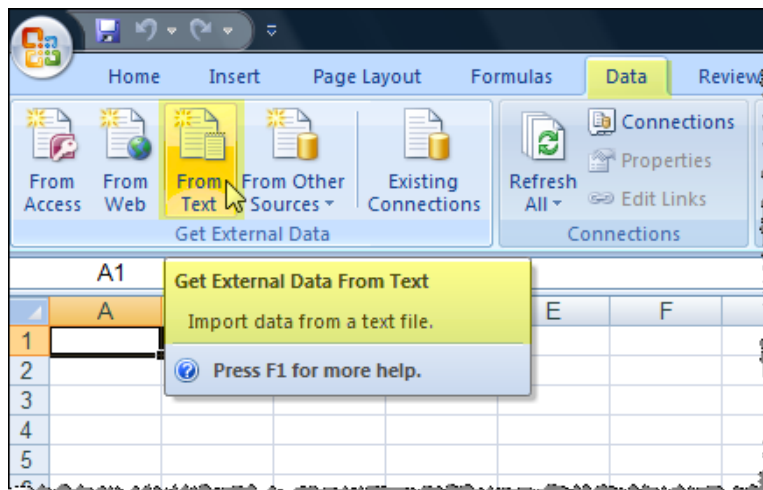


Figure 4

On the next screen, we'll navigate to the folder and filename of the saved .TXT file.

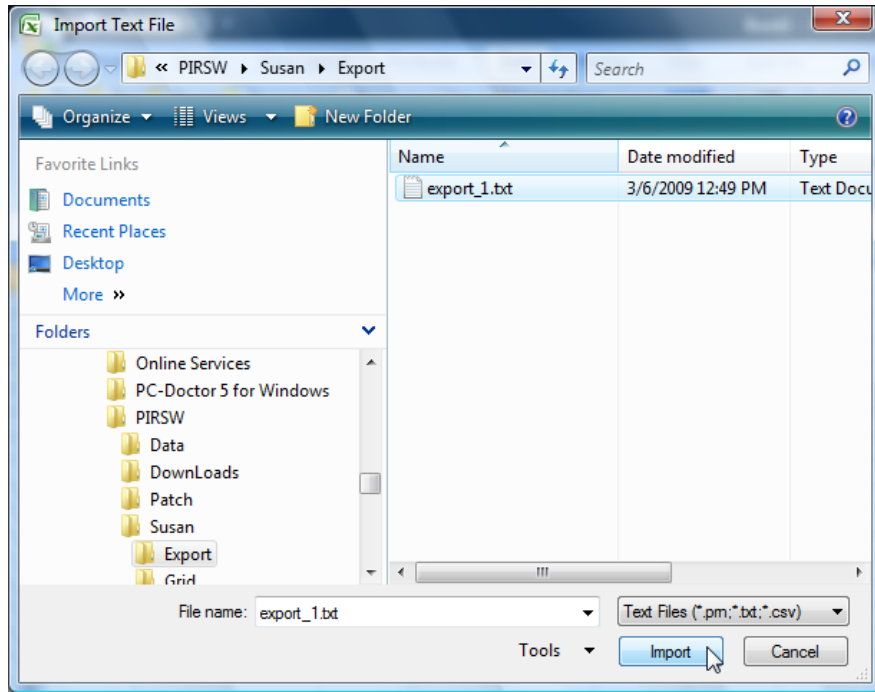


Figure 5

The Text Import Wizard displays guiding me through the 3 screens of the import process.

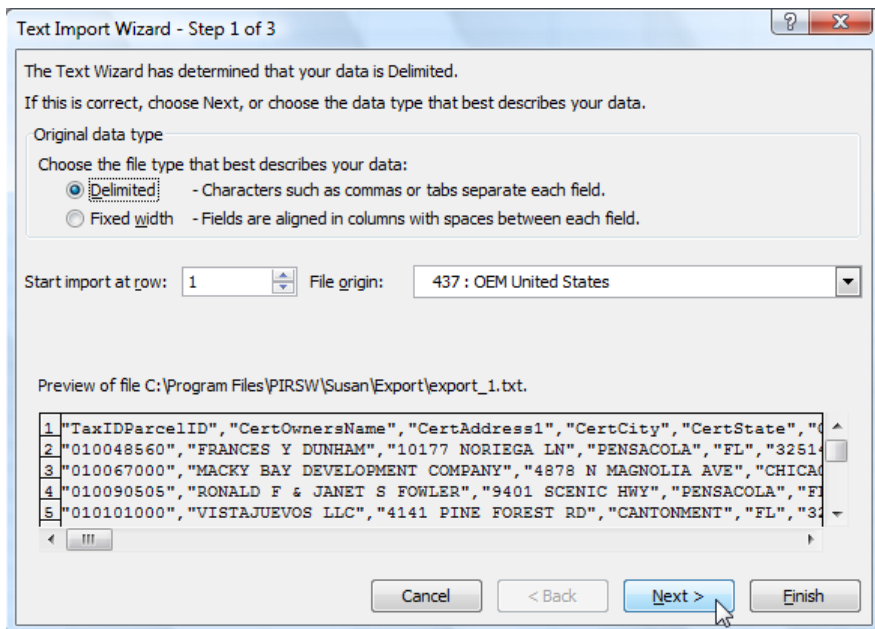


Figure 6

Since I chose 'Quoted Comma Delimited' in the export process (see Figure 2), I will now place a checkmark by 'Comma' under the Delimiters options.

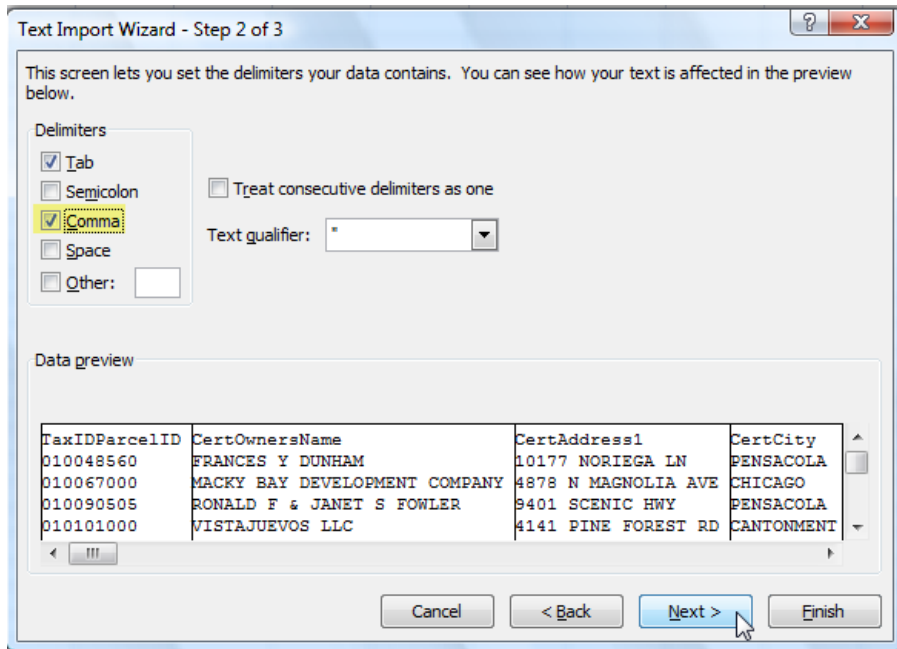


Figure 7

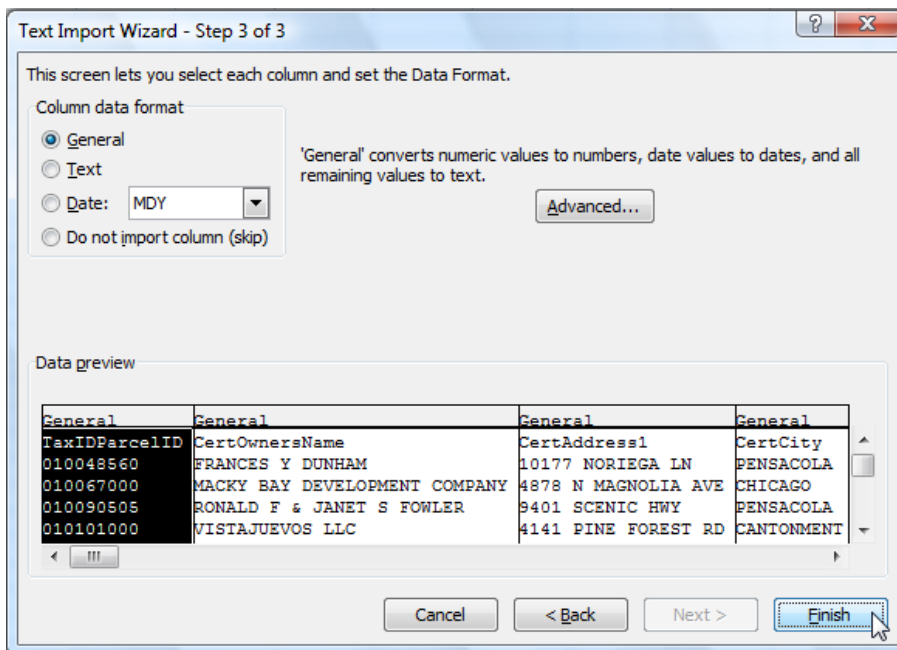


Figure 8

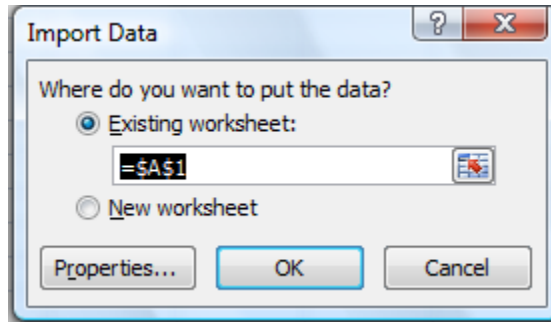


Figure 9

The Excel spreadsheet now displays with the imported data from PIRS. Note that the names appear first name first, based on our preference setting (see Figure 1).

	A	B	C
1	TaxIDParcelID	CertOwnersName	CertAddress1
2	10048560	FRANCES Y DUNHAM	10177 NORIEGA LN
3	10067000	MACKY BAY DEVELOPMENT COMPANY	4878 N MAGNOLIA AVE
4	10090505	RONALD F & JANET S FOWLER	9401 SCENIC HWY
5	10101000	VISTAJUEVOS LLC	4141 PINE FOREST RD
6	10317467	HARRY D KAHN JR	4520 TRADEWINDS PL
7	10772555	RICHARD A & DAWN M THOMPSON	7400 CAMALE DR
8	10772560	MOSES F WILLIAMS	7402 CAMALE DR
9	11188000	THOMAS J & LYNN HAYES	5122 GULL POINT RD
10	11306128	BRADLEY C CLOSE	35 HASE RD
11	11306424	ROSS C GONSALVES	4781 TERRASANTA
12	11927541	JAIME H FRANKS	6492 ALVARADO RD

Figure 10

Exporting Selected Data Fields

There may be times when you only want to export selected data field columns from Table View. This can easily be accomplished with just a few additional steps.

First, we have to create an export template identifying the data field columns. This template is referred to as an Export Layout file or simply Export file. You can have as many templates as desired.

To create a new Export Layout file template we'll select Setup from the top menu of PIRS and click on Export Data Fields.

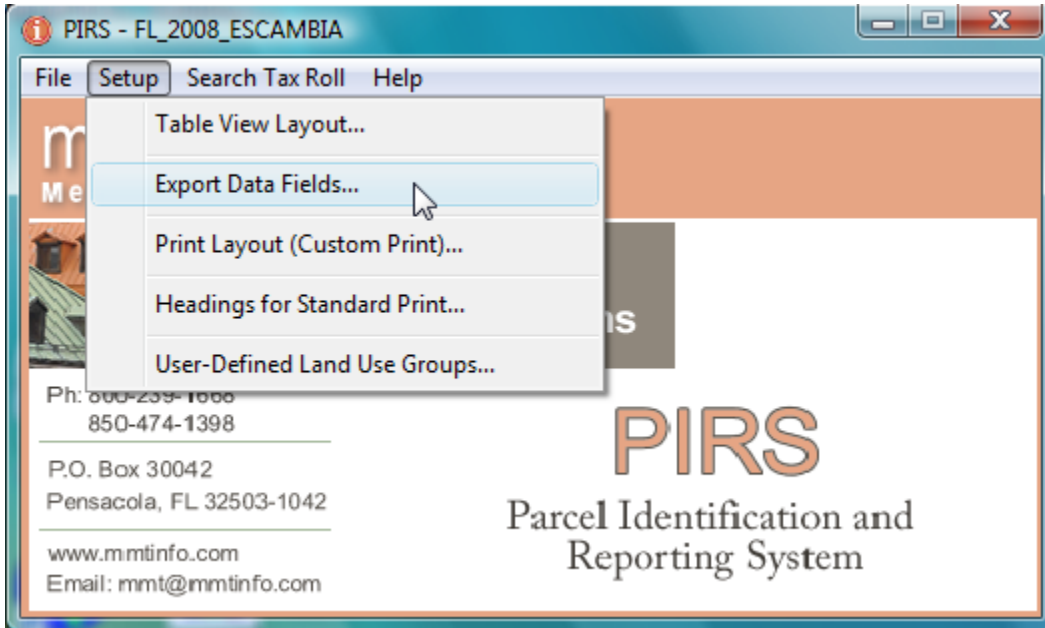


Figure 11

A dialog box will appear and ask “Do you want to Create a New Export File?” If we answer Yes we’ll be creating a new layout, and if we answered No we could edit an export file that already exists. We’ll answer Yes.

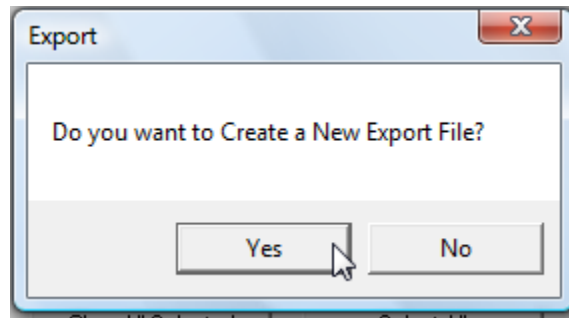


Figure 12

We must now assign a file name for our new Export Layout. By default the file is stored in the Export folder which is a sub folder of the PIRS program folder with a file extension of EXP. However you can navigate and save this file in any location you desire. We’ll accept the default location and name our file **TEMP1** and click Save.

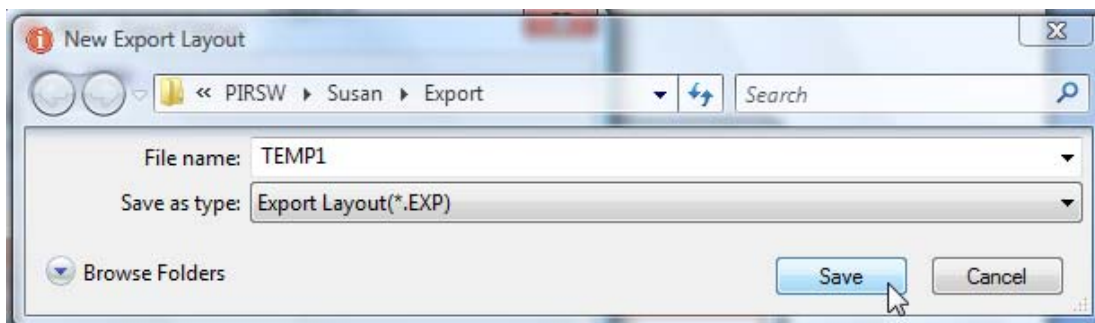


Figure 13

A PIRS Export Setup window will then appear and we can place a check mark in the box to the left of the data field columns we want to include in this Export Layout template. For this tutorial, we'll select just the current owner address fields.

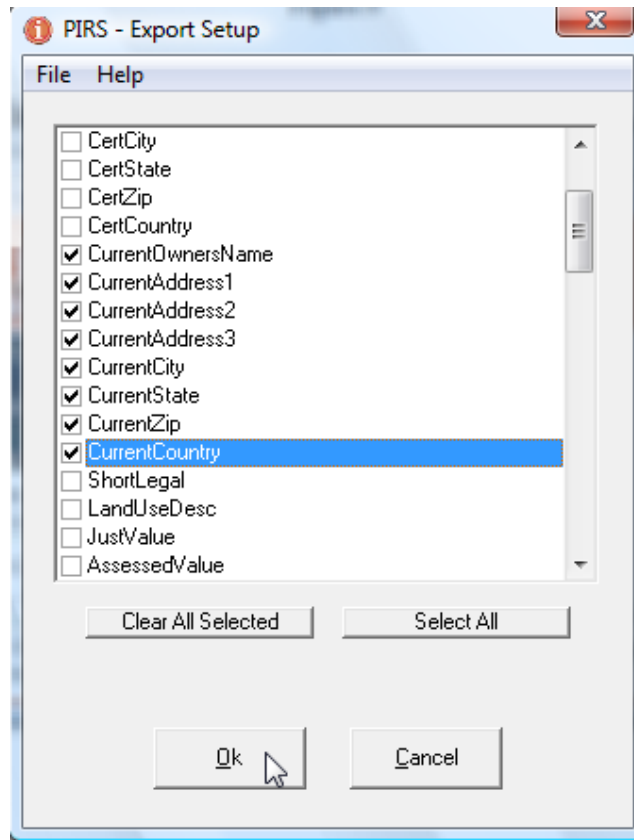


Figure 14

The layout template is now ready to use during exporting.

By using this user-defined Export Layout file we will only be exporting the current owner address data fields. In Table View from the Export menu item we'll choose: **Data From Table View → Export All Records → Export Using User-Defined Layout → Quoted Comma Delimited.**

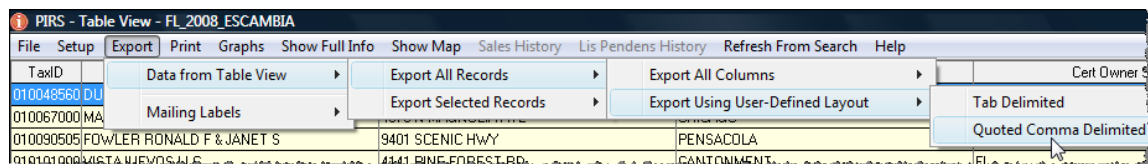


Figure 15

The Select Export Layout directory window will appear and we'll navigate to find the Export template file we created and click Open.

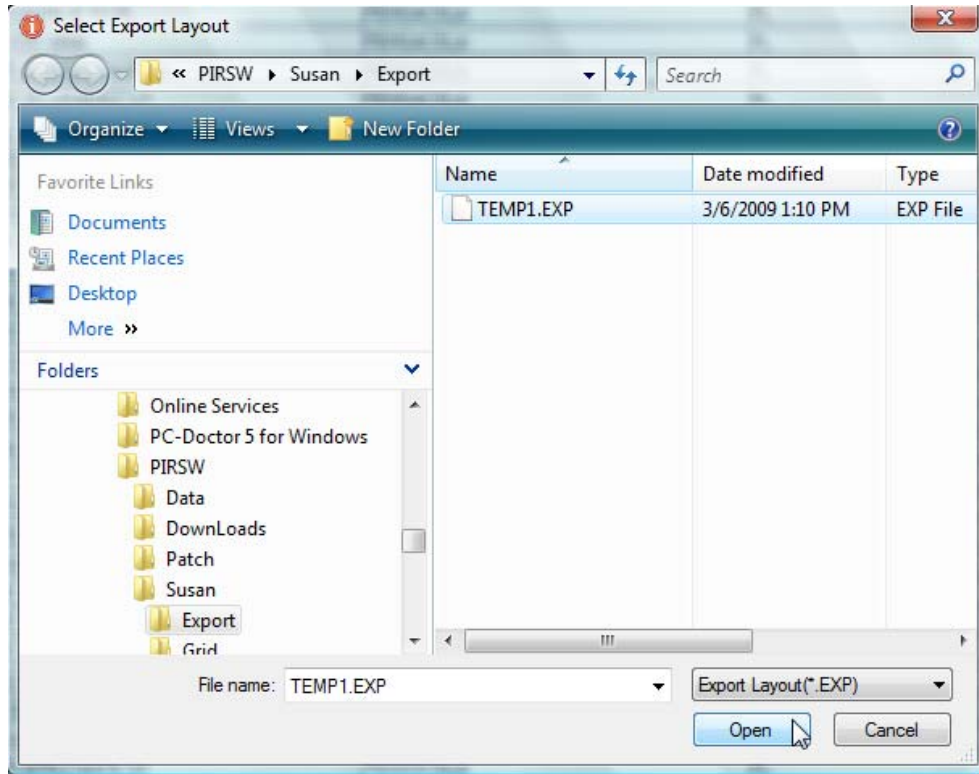
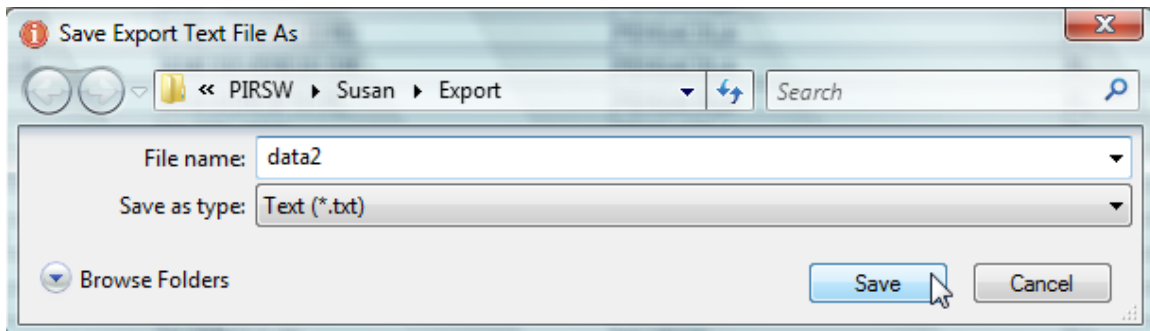


Figure 16

We're now ready to create the exported data file. A directory window will display so we can name the text file being created and choose a location to save this file. By default the file is stored in the Export folder which is a sub folder of the PIRS program folder with a file extension of .TXT, however you can navigate and save this file in any location desired. We'll accept the default location and name our file **data2** and click Save.



Importing Selected Data Fields

Now, back in Microsoft Office Excel 2007 we'll follow this program's import procedure of choosing Data from the top menu bar. Then choose "From Text", and navigate to the filename we previously saved as a .txt file. The Text Import Wizard displays guiding me through the Import process (see figures 5 – 7).