Exporting

In Extract, you have the option to export your extraction results to an **Microsoft Excel spreadsheet** or a **Microsoft Word document**. To export data points from a document, the document must at least be linked to a review form. If the review form is just linked and have not been run on the document, then the export generates a report with no data points. To export a report with data points, run the review form on the document before exporting it.

1. Document Selection

Select the check boxes next to a document to select individual documents or select **Select All** at the top to select all the documents in the project.

2. The Export button

Select the **Export** button to choose what type of information you would like to export. There are two export options available - **Datapoints & Metadata** or **Tables**.

NOTE: You can also access the **Export** feature from the **Extraction Results** page.

3. Export Datapoints & Metadata

Select this option if you want to **Export** selected **review forms, datapoints** and **metadata** from the documents.

4. Export Tables

Selecting **Tables** will automatically export to an **Microsoft Excel** spreadsheet any tables within the selected documents.

Exporting (continued)

Select **Export Datapoints & metadata** to initiate the process. The **Export** dialog box appears:
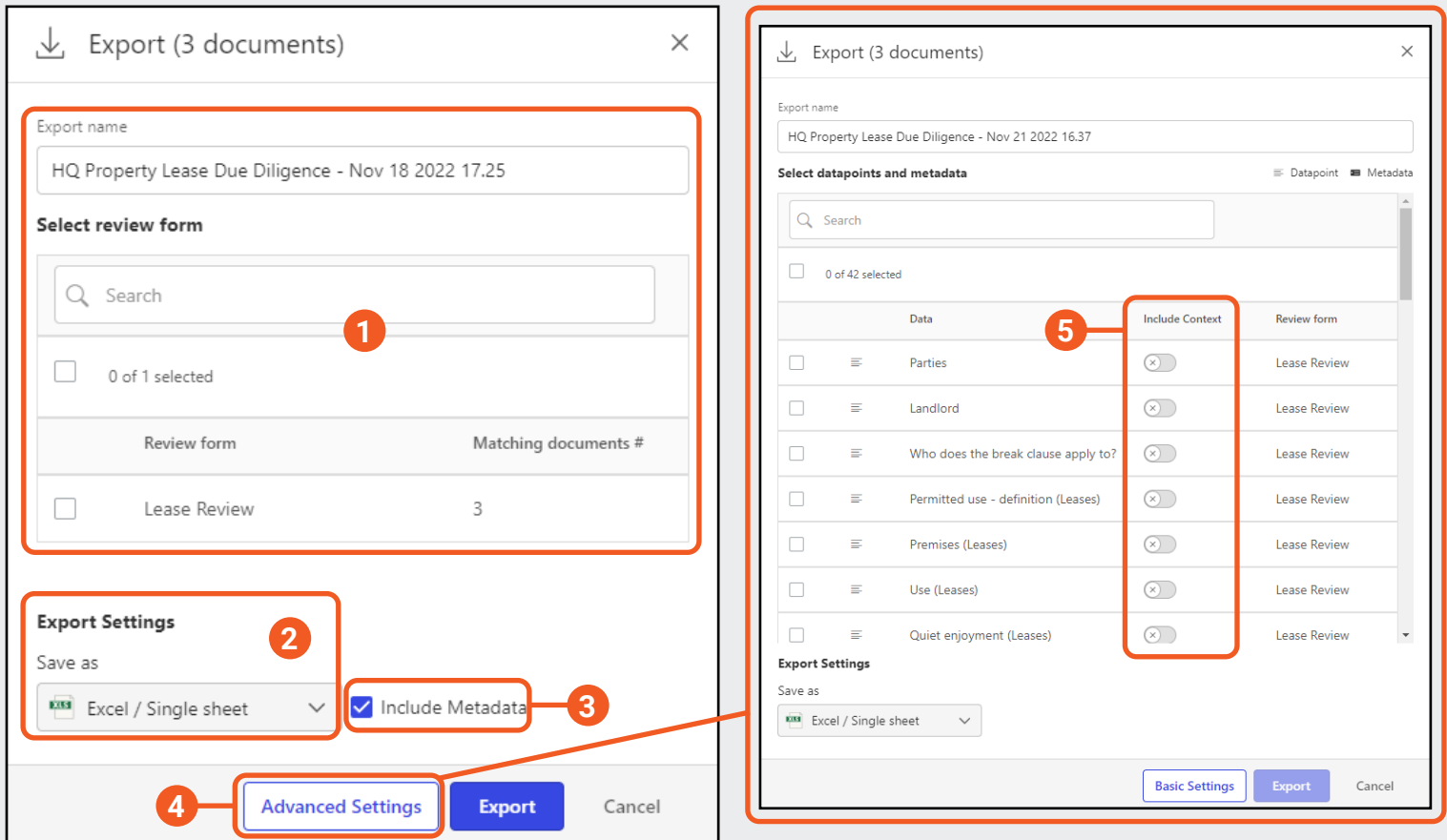
1. Select Review form

Select the **Review form/s** you want to export the data from the selected documents.

2. Export Settings

Select the format in which you want to export the data points. You have the options of **Excel Single/Multiple Sheet** or **Word Single/Multiple files**.

3. Include Metadata

Select **Include Metadata** check box if you want to include the document metadata in the output.

4. Advanced Settings

If you do not want all the datapoints and metadata to be exported, then select **Advanced Settings**. The Advanced settings dialog box appears where you would be able to precisely choose the datapoints you would want to export.

5. Include Context

If you want to include the context of particular data point, enable the data point **Include Context** slider. Context is the text that surrounds the data point.

6. Exporting

Select the **Export** button. The data points and the metadata from the documents are exported to your computer in the selected output format.

Exporting (continued)

After selecting the **Export** button, Extract will initiate the creation of your export file and your download should start **automatically**. If your download does not start automatically or you would like to access your export file at a later stage, you can do that by accessing it from the **Task list** by selecting the 🔔 icon on the top right of your Extract screen.

1. Finding your Export file

In the list of **Completed Tasks** you will be able to locate the export file you would like to download by the name you have given it.

2. Tasks Filtering

You are able to filter all the items available in the **Completed Tasks** window. You can choose to filter by **Type: Export** to view only the exporting tasks that have been created.

3. Download or Delete

You are able to either **Download** or **Delete** a previously created export file.

4. Final Exporting results

Depending on what settings you have chosen before creating your export file, you would end up with a final Microsoft Excel or Word document that will contain all your **extractad data** in a **structured way**, **ready** for manipulation.