

Exporting Resource Records Using the Resource Helper Tool

Relevant To: Resources, Systems Management

Core Concepts

Why would I need to export resource directory records?

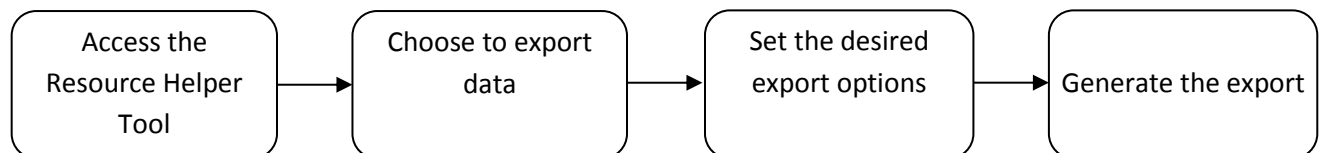
While you can search for and access resource directory records from within CAS 2.0, you may at times want to export them in order share them with those who do not have access to the system or to format the records using Excel or other software that is external to the system.

Which data is included in an export of resource directory records?

You can export the agencies, programs, and services that you use for referrals, and you can restrict those that appear in an export through such options as **Service Location** (state), **Service Physical Site Zip**, **Service Status**, **Agency Name**, **Program Name**, and **Service Name**. You cannot export the program records that you use for merchants because they are not associated with service records. It is important that you restrict your export in order to avoid exporting unnecessary records.




Process

Process Flow



Process Steps

Step	Action
1. Access the Resource Helper Tool	<ul style="list-style-type: none"> • (if not at the My Tools screen) Click CAS 2.0 My Tools. • Click CAS 2.0 My Tools. • Click Resource Helper Tool in the Resource Management section. ⇒ <i>The system displays the Resource Helper Tool screen, which features an option to Export Resource Data to CommunityOS Spreadsheet.</i>

Step	Action
<div data-bbox="233 279 527 315">Resource Helper Tool</div> <div data-bbox="250 361 341 388">Options</div> <p data-bbox="233 403 1474 449">The APS XLS tool is used for exporting and importing Agencies, Programs, and Services to and from CommunityOS. An offline data collection or data correction tool.</p> <div data-bbox="240 468 321 552">  </div> <div data-bbox="337 466 602 491">New Import into CommunityOS</div> <div data-bbox="647 466 1484 512">Select this option when you have resource data in the Resource Helper Tool spreadsheet and it is the first time you will have imported resource data into CommunityOS</div> <div data-bbox="240 562 321 646">  </div> <div data-bbox="337 556 583 602">Export Resource Data to CommunityOS Spreadsheet</div> <div data-bbox="647 556 1440 602">Select this option when you want to export all or part of your resource data to the Resource Helper Tool spreadsheet.</div> <hr/> <div data-bbox="240 686 315 772">  </div> <div data-bbox="337 684 812 711">Download blank CommunityOS Resource Spreadsheet</div>	
<p>2. Choose to export data</p>	<ul style="list-style-type: none"> Click the green down arrow. <ul style="list-style-type: none"> The system displays your first export option, which asks you if you want to restrict your results to your agency/chapter.
<div data-bbox="214 1016 597 1052">Resource Data Helper Tool</div> <p data-bbox="295 1094 1432 1119">Please select one of the following criteria below to create an export of resource data in the CommunityOS spreadsheet format.</p> <div data-bbox="310 1197 488 1226">Export Options</div> <div data-bbox="293 1243 370 1268">Step 1:</div> <div data-bbox="293 1266 453 1289">Restrict Results To</div> <div data-bbox="302 1299 985 1329"> <input type="radio"/> Your Agency: South Central Alabama Chapter OR <input type="radio"/> Don't Restrict </div>	
<p>3. Set the desired export options</p>	<ul style="list-style-type: none"> Select the Don't Restrict option at Step 1 of the Export Options. <ul style="list-style-type: none"> The system displays additional criteria for restricting the export's records, not all of which are relevant to our use of the Resource Directory. It is important that you utilize at least one of the additional criteria to prevent your export from being unnecessarily large.

Step	Action
<div style="border: 1px solid #ccc; padding: 10px;"> <h3 style="margin: 0;">Export Options</h3> <p>Step 1: Restrict Results To</p> <p><input checked="" type="radio"/> Your Agency: South Central Alabama Chapter OR <input type="radio"/> Don't Restrict</p> <hr/> <p>Step 2: Choose Criteria</p> <p>Service Location <input type="text" value="Select One"/> ▼</p> <p>Service Physical Site Zip <input type="text"/></p> <p>Service Status <input checked="" type="radio"/> All <input type="radio"/> Active <input type="radio"/> Other</p> <p>Data Provider <input type="text" value="Select One"/> ▼</p> <p>Program Name <input type="text"/> Clear</p> <p>Service Name <input type="text"/> Clear</p> <p>Portal Restriction Filter Name <input type="text"/> Clear</p> <p>Service Edit Date <input type="text"/> through <input type="text"/></p> <p>Taxonomy Code + Add Taxonomy Field</p> <p>Taxonomy Hierarchy beginning with: + Add Taxonomy Code</p> <p style="text-align: right;">Cancel Create Export</p> </div>	

3. Set the desired export options (cont.)

- Enter additional criteria to restrict the export's records; those relevant to our use of the Resource Directory are:
 - **Service Location** [state]
 - **Service Physical Site Zip**
 - **Service Status**
 - **Agency Name**
 - *Agency Name* appears as a criterion only if you choose not to restrict search result to your agency/chapter.
 - The system offers you values to select as you enter the name.
 - **Program Name**
 - The system offers you values to select as you enter the name.
 - **Service Name** (the system offers you values to select as you enter the name)
 - The system offers you values to select as you enter the name.

Step	Action
	<ul style="list-style-type: none"> ○ Service Edit Date range <ul style="list-style-type: none"> ☞ <i>Select the dates from the calendars or enter them in an MM/DD/YYYY format.</i>
4. Generate the export	<ul style="list-style-type: none"> • Click Export Results. <ul style="list-style-type: none"> ☞ <i>Your computer prompts you to open or save the exported file, which is a csv file.</i> • Use your computer's standard functionality to open or save the file; you can save it as an Excel file after opening it, if desired.

Related Training Materials

- Introduction to the CAS 2.0 Resource Directory
- Viewing a Service Record through the Search Resources Function
- Adding an Agency to the Resource Directory
- Editing an Agency Record
- Adding a Merchant to the Resource Directory
- Editing a Merchant Record
- Adding a Program to the Resource Directory (for Referrals)
- Editing a Program Record (for Referrals)
- Adding a Service to the Resource Directory
- Editing a Service Record
- Importing Resources Using the Resource Helper Tool

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