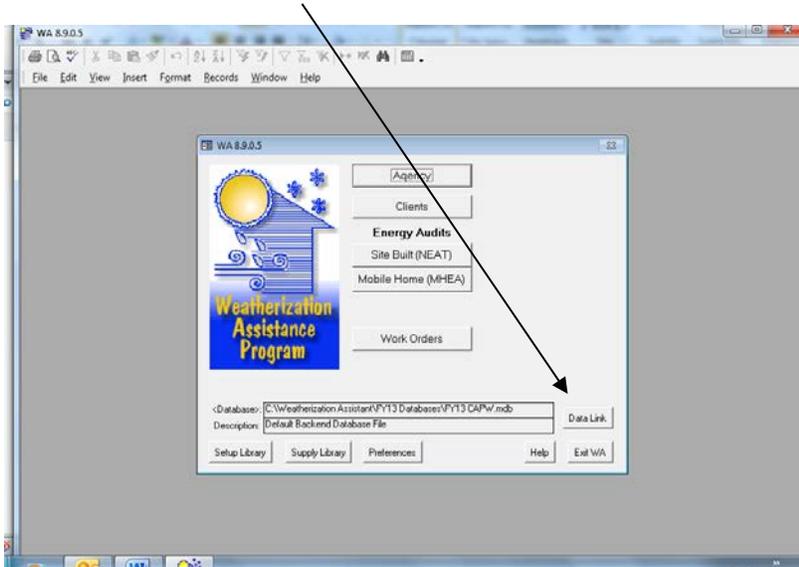


# How to Export Weatherization Assistant Client Records & Library

rev. 5/31/16

The following directions should be used whenever you need to send NEAT or MHEA audits to another user of the Weatherization Assistant Software. When you complete an export, you are actually **creating a zipped database** that contains all information related to the selected client records. This information includes the agency record and all audits assigned to the client as well as the **setup and supply libraries used by the audits.**

1. Select "Data Link" from the main Weatherization Assistant menu.

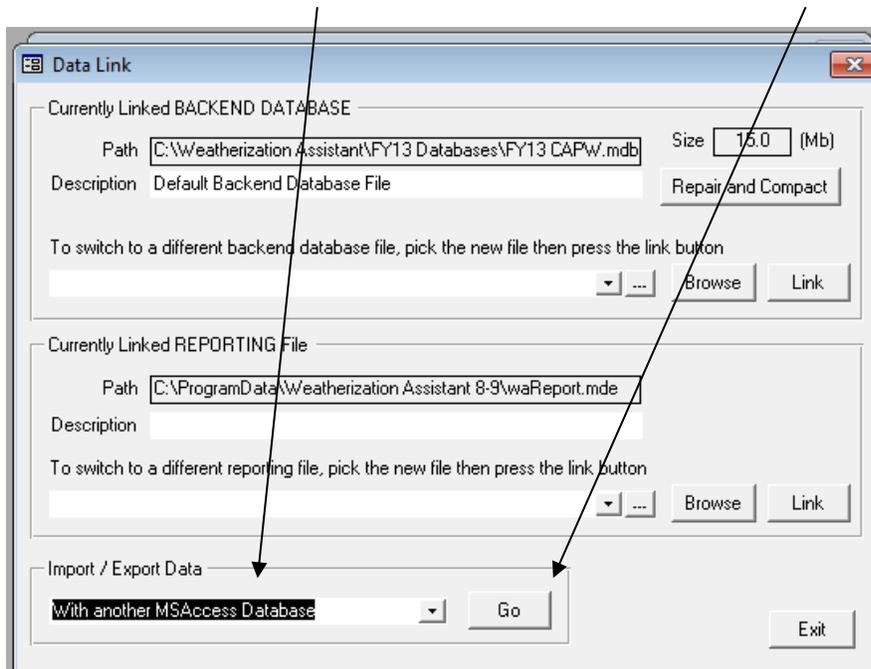


## NOTE:

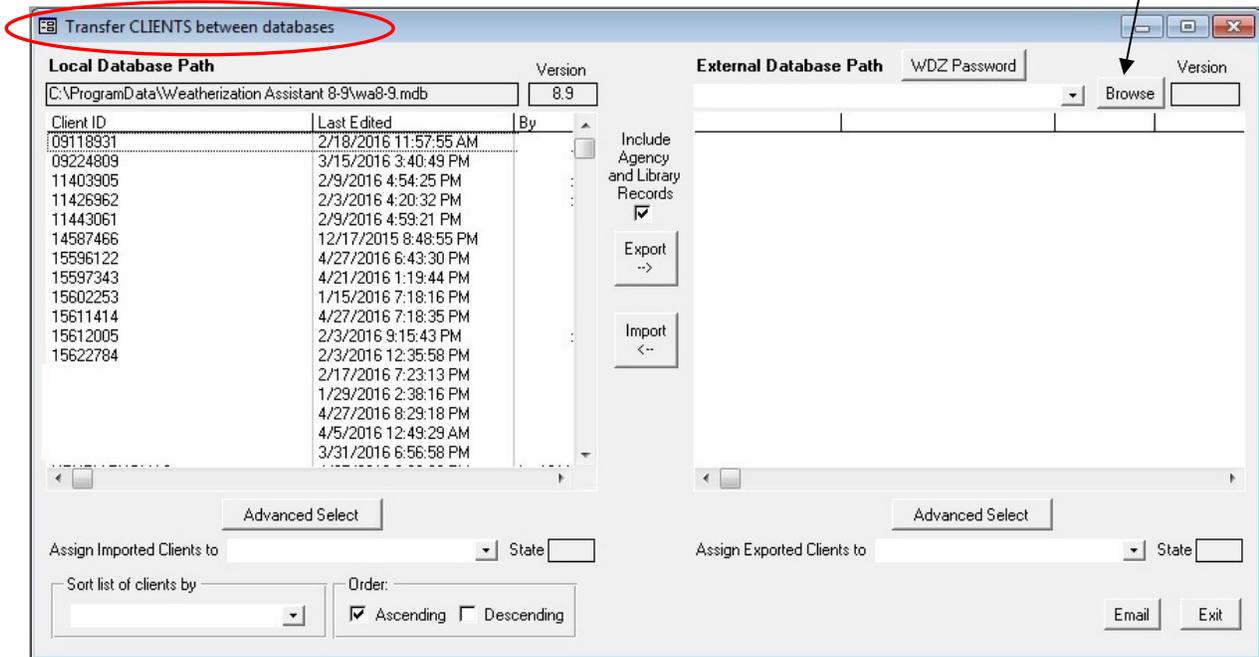
There are two important reasons why you should **follow this procedure** as described here:

- 1) This zipped database method creates a special file that encrypts the client data which can then be emailed in a secure form.
- 2) Some email programs have difficulty handling large files (such as .MDB) and is consequently less reliable.

2. Select "With another MSAccess Database" and click "Go"



3. You should see a window labeled “Transfer between databases”. The first thing to do is **create a database file to hold the exported client record(s)**. Click on the “Browse” button to open a new window that will contain the zipped database you export.



4-a) Select a specific folder location to save the export file such that it can be easily located later.

4-b) Use this naming rule: (Agency Acronym)+(YYMMDD), like “OEO160517”.

4-c) Click the “Save as type” drop-down box and choose “Zipped Weatherization Databases (\*.wdz)”.



**NOT** the default setting “Any Database (\*.wdz, \*.mdb)”.

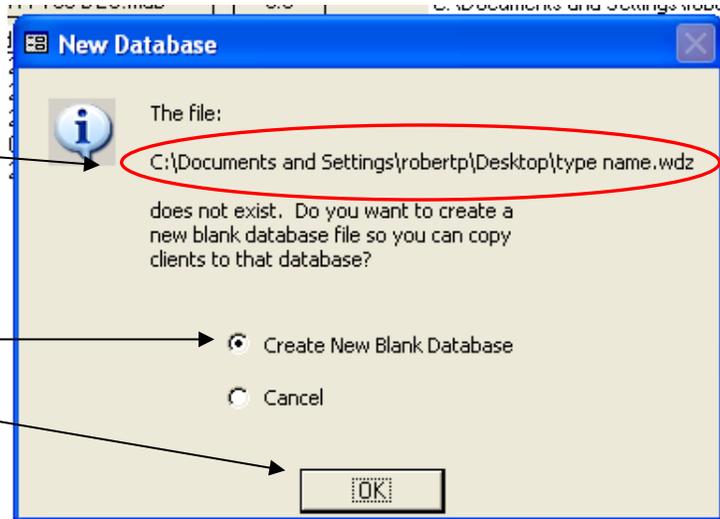
**Don’t name or rename the export file** anywhere outside of NEAT/MHEA or else the program won’t know how to find it.

Click **Save**.

5. The following window will appear before the export file can be created.

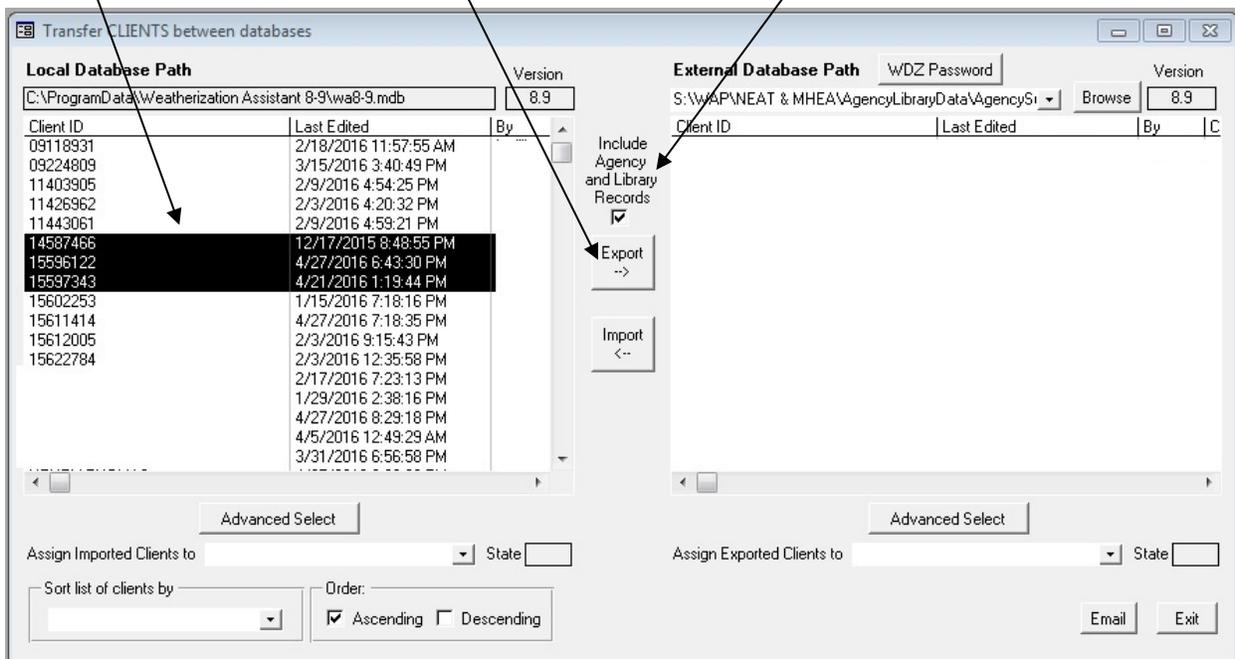
**Make sure to note the location of this file! You will need to find it on your computer later.**

Create the new blank database (note radio button is selected) by clicking "OK".

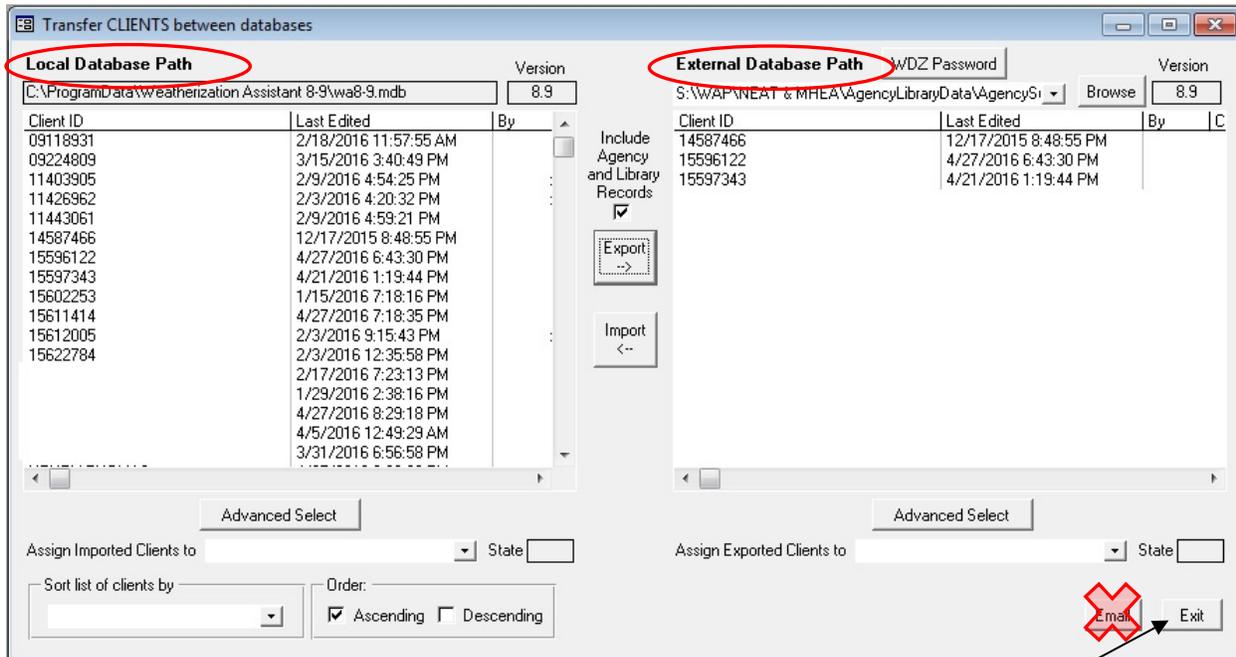


6. Next, on the left-hand side of the screen, highlight the jobs to be exported. (Note: to select multiple records, hold the CTRL key down and click each one—or just click on the first and last jobs in a sequential range while holding down SHIFT to select the desired client records.) **Be sure the "Include Agency and Library Records" box is checked to include your agency libraries, unless you have some specific reason not to.**

Select client records. Click the "Export" button.

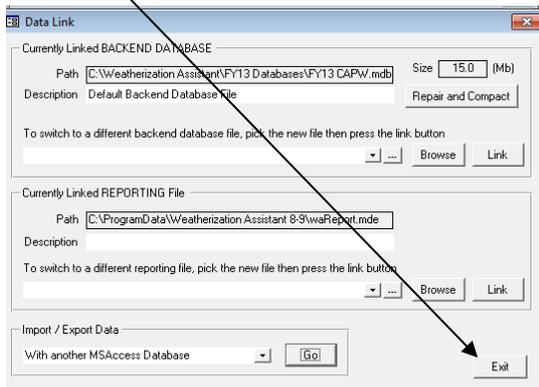


7. All of the jobs you selected for export on the left-hand side under “Local Database Path” should now appear on the right-hand side under “External Database Path.” **Do Not Use The Email Button.**

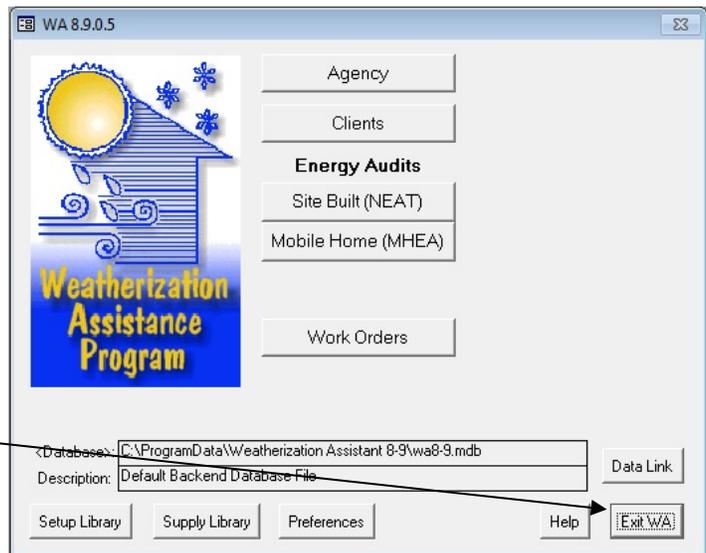


You can now **exit** this window, and back out of the Data Link screen.

8. **Exit** out of the next window.



9. You can now **exit** the WA Software if you are finished with exporting client records.



10. Locate the export database file you created on in step 5 to verify that it was created. You can now attach the new zipped database file to an e-mail to send to another user or copy to a network location for other users to import. *(Remember : You will not be able to view the encrypted contents of this file anywhere but within Weatherization Assistant. If you can't find the file, you will need to start over from the beginning.)*