
HOW TO: Export and Import Templates

Overview

There may be times that you want to export task templates from one FLEETMATE database, into a different FLEETMATE database. This document provides the basics of performing this action.

There are two (2) basic steps involved in this process:

- **Export the Template Data** from the Source Database
- **Import the Template Data** into the Target Database

The export process will export ALL templates. You cannot select specific templates. However, you can edit the resulting export data file, removing any data that you do not want to import into the target database.

Each task template in a FLEETMATE database must have a unique **Template Number**. This means that if you have a template number 10 that you want to export, and then import into a different database, template number 10 cannot already exist in the target database.

There are two tables involved in this process:

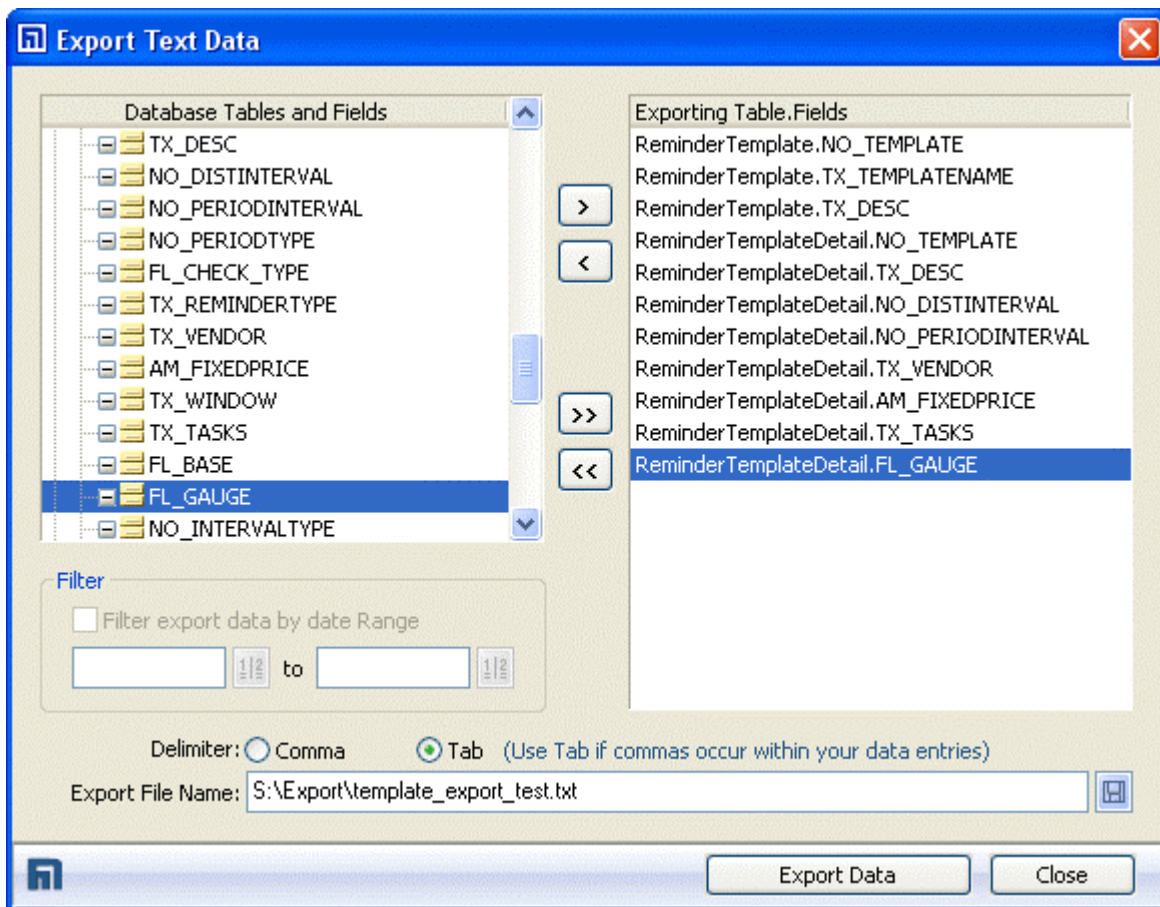
- **ReminderTemplate**
This table contains the template header records. The needed fields are
 - NO_TEMPLATE
 - TX_TEMPLATENAME
 - TX_DESC
- **ReminderTemplateDetail**
This table contains the individual recurring task records that are associated with each template. The needed fields are:
 - NO_TEMPLATE
 - TX_DESC
 - NO_DISTINTERVAL
 - NO_PERIODINTERVAL
 - TX_VENDOR
 - AM_FIXEDPRICE
 - TX_TASKS
 - FL_GAUGE

The next page will provide step-by-step instructions to follow.

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Export Template Data

To export your templates, click the **File | Database | Utilities | Export Text Data...** menu option. Available database fields are listed on the left. Fields that you have selected for exporting are listed on the right. Expand/collapse fields in each table using the **[+]** and **[-]** buttons, and use the **[<]** and **[>]** buttons to add/remove fields from your export list on the right.



Export Text Data Dialog

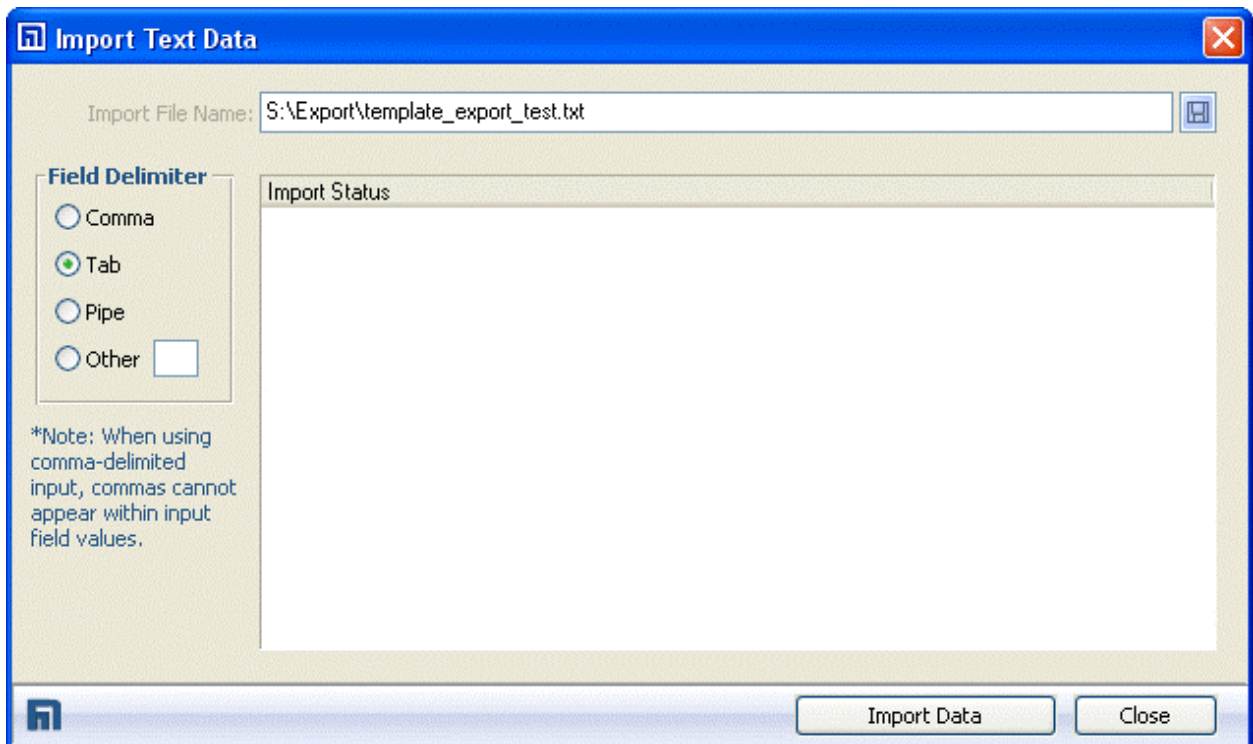
Use the **Browse** button to define the file that is to contain your exported data. You may choose a Tab character or a comma as your delimiter. Click the **Export Data** button to export your data to the file you have specified in the Export File Name box.

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Import Template Data

Once you have exported your template data, the next step is to import your data. Open the target database. This is the database that is to receive the exported template data.

Click the **File | Database | Utilities | Import Text Data...** menu option.



Import Text Data Dialog

Select your import file using the **Browse** button. In the picture above, the path "**S:\Export\template_export_test.txt**" is the file we previously exported our data to.

Set your **Field Delimiter** to match the delimiter chosen when you exported your data.

Click the **Import Data** button to begin the import process.

Once the import process is complete, and displays no errors, review your templates to confirm that the data imported as expected.