PrimaTech
Specialists in Safety, Security and Risk

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EXPORTING DATA FROM PHAWORKS AND AUDITWORKS

This document explains how to export data from PHAWorks and AUDITWorks using the comma delimited format. The Export feature was designed to export recommendations (action items) from PHAWorks and AUDITWorks to be imported and tracked in other programs (e.g., Excel, Quattro Pro, Access, Paradox).

If you want to generate reports to open in word processing programs such as Word, you need to use the HTML Report feature (PHAWorks V4.1 and later) in Reports. The HTML Report feature is not available in AUDITWorks.

EXPORT FORMATS:

(Hierarchical)

- The export outline format shows the hierarchical relationships of data. This hierarchy depends on the column relationships set up in a project. Every successive level in the hierarchy is indented with a single tab. All data from the project is exported.

(List) - This export feature is based on the data from the RECOMMENDATIONS column.

- Each field is on a separate line and records are separated by a line containing text similar to "<<Record 4>>".

(Comma Delimited) - This export feature is based on the data from the RECOMMENDATIONS column.

- Each record occupies a single line and each field is surrounded by double quotes and separated with a comma. This format can be imported into programs (e.g., Excel, Quattro Pro, Access, Paradox) for tracking recommendations (action items).

  This export format is based on data from the RECOMMENDATIONS column. For example, let say you have a study that includes 20 nodes (elements) and when you print out the worksheet report its 150 pages. For this example, lets assume you only have one recommendation in the study. When you export the data, only that one recommendation and associated data (node, parameter, consequences, or question, answer, etc.) will be exported. None of the other data will be exported since there are no other recommendations.

HOW TO EXPORT (PHAWORKS IS USED FOR THIS EXAMPLE):

1. Open a PHAWorks project
2. Choose "Export" from the File menu
3. Choose the export file format

   - "Record (comma delimited)" for PHAWorks V2/V3 and AUDITWorks 1
   - "Recommendations Record (comma delimited)" for PHAWorks V4.x and V5.x

4. **OPTIONS** - Click on "Options" to select the fields you want to export. The Options function is only available in versions PHAWorks V3 and later.

   - In PHAWorks V5.x and later, you can move (left click, drag and drop) the order of the fields in the Export Fields (Options) dialog. The order in which the fields are placed is the order in which they will be exported. This capability is not included in AUDITWorks.

5. **FILTERS** - Click on "Filters" to filter what data is exported. The filters function is only available in versions PHAWorks V4.x and later and AUDITWorks.
6. Click on OK
7. Select the folder (directory) where you wish the exported file to be written
8. Type in the name of the file which will contain the exported project information
9. Click on OK and the project will be exported

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PHAWORKS 5.X EXPORT CHANGES:

- PHAWorks 5.x exports additional fields. However, in PHAWorks 5.x you now have the capability to order the fields exported (using drag and drop the order the fields). This will allow you to match up your current import to other programs.
- In PHAWorks 4.1 and earlier, the Ref# column (Reference Number) was automatically generated and was not a worksheet column. It was also the first field exported. In PHAWorks 5.x, this is now a worksheet column. The default name of this field in the export dialog is "Recommendation Reference Number" that is located before the Recommendation field in the export dialog.
- We have also added "Chemicals", "Process", and "Process Description" to the end of the export list.
- With PHAWorks 5.x, you also have the capability of adding columns, renaming columns, and removing columns in the worksheet that may also affect the fields exported.

IMPORTING DATA EXPORTED FROM PHAWORKS INTO OTHER PROGRAMS:

Due to limitations of some programs, after importing ASCII files you may receive an error message indicating that the file was not completely imported. Possible reasons include:

- The file may be too large. At least one program we tested stopped after 16,000 lines.
- Some programs have problems with more than 255 separate fields.
- The text in a field contains more than 255 characters.

For more information on how to import / open ASCII files into other programs, please refer to the user guides for these programs.

In addition to software, Primatech provides consulting services for process safety, security and risk management to help companies comply with OSHA PSM and EPA RMP. Our training services include more than 30 courses (e.g., PHA training - HAZOP Team Leader) and we offer both open enrollment and in-house technical training courses. Visit us at www.primatech.com for more information.

Items that might be of interest to you at www.primatech.com:

- When attending our PHA for Team Leaders course, take advantage of our special offer for PHAWorks 5 and/or AUDITWorks 1
- Take a look at our upcoming training courses scheduled for 2005
- The Business Case For Cyber Security (PDF File)
- Tracker allows you to track action items (recommendations) generated from PHAWorks and other sources from conception to completion. Use Tracker for tracking and as a management tool to assure all items are completed as required.

If I can be of any further assistance, please do not hesitate to contact me.

Sincerely,

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