


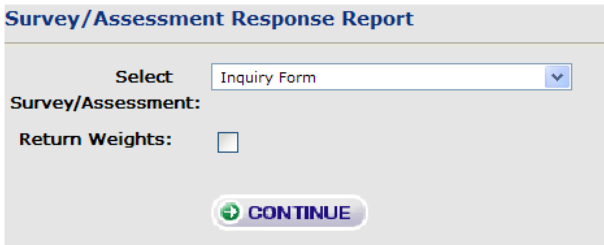


# Accessing and Exporting SMART FACTS Flat File Reports

## Overview

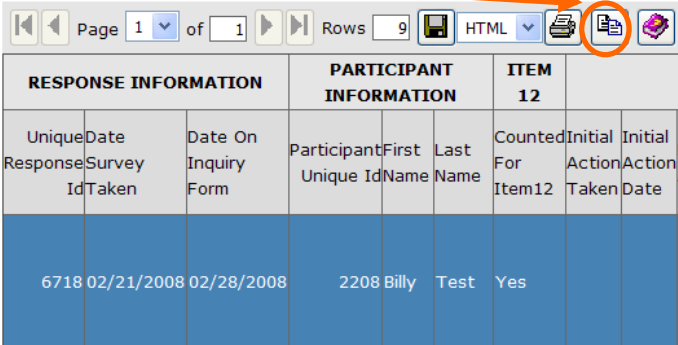
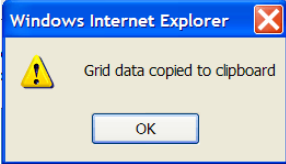
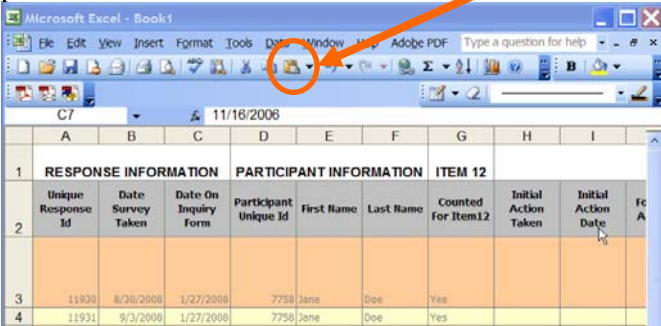
Flat File Reports provide SMPs with the ability to save data into an Excel document in order to search, sort, or otherwise manipulate the data included in the report. This job aid provides instruction on how to access and export the Flat File Reports available in SMART FACTS.

## Accessing Flat File Reports

Step	Action
1	Log in to SMART FACTS.
2	<p>On the right side of the screen, click the word <b>Reports</b> to open the Reports Menu. Then click <b>Letters, Forms, &amp; Reports</b>.</p> 
3	<p>On the left, the list of reports will appear. Scroll down to select the appropriate report. Flat File Reports currently include <b>OIG Report Flat-File</b> and <b>Complex Issues Flat File Report</b>.</p> 
4a OIG Report Flat-File	<p>Enter the appropriate date range and click <b>Submit</b>.</p>  <p><i>Tip: Once the report is open, scroll to the right as needed to view additional fields of information.</i></p>
4b Complex Issues Flat File Report	<p>Select "Inquiry Form" from the drop-down list and click <b>Continue</b>.</p>  <p>Enter the appropriate date range and click <b>Submit</b> (as shown in 4a above).</p>

# Accessing and Exporting SMART FACTS Flat File Reports

## Exporting Flat File Reports

Step	Action																																																		
1	Access the Flat File report by following the steps above.																																																		
2	<p>In the SMART FACTS Flat File Report, click the <i>copy grid to clipboard</i> icon (to the right of the printer icon).</p>  <table border="1"> <thead> <tr> <th colspan="3">RESPONSE INFORMATION</th> <th colspan="3">PARTICIPANT INFORMATION</th> <th>ITEM 12</th> <th></th> <th></th> </tr> <tr> <th>Unique Response Id</th> <th>Date Survey Taken</th> <th>Date On Inquiry Form</th> <th>Participant Unique Id</th> <th>First Name</th> <th>Last Name</th> <th>Counted For Item12</th> <th>Initial Action Taken</th> <th>Initial Action Date</th> </tr> </thead> <tbody> <tr> <td>6718</td> <td>02/21/2008</td> <td>02/28/2008</td> <td>2208</td> <td>Billy</td> <td>Test</td> <td>Yes</td> <td></td> <td></td> </tr> </tbody> </table>	RESPONSE INFORMATION			PARTICIPANT INFORMATION			ITEM 12			Unique Response Id	Date Survey Taken	Date On Inquiry Form	Participant Unique Id	First Name	Last Name	Counted For Item12	Initial Action Taken	Initial Action Date	6718	02/21/2008	02/28/2008	2208	Billy	Test	Yes																									
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3	<p>The following message appears. Click <b>OK</b>.</p> 																																																		
4	<p>Open a new Excel document.  <i>Tip: Start Menu &gt; Programs &gt; Microsoft Office &gt; Excel</i></p>																																																		
5	<p>In the Excel document, click the <i>Paste</i> icon. The data is pasted into the Excel document.</p>  <table border="1"> <thead> <tr> <th>1</th> <th colspan="3">RESPONSE INFORMATION</th> <th colspan="3">PARTICIPANT INFORMATION</th> <th>ITEM 12</th> <th></th> <th></th> </tr> <tr> <th></th> <th>Unique Response Id</th> <th>Date Survey Taken</th> <th>Date On Inquiry Form</th> <th>Participant Unique Id</th> <th>First Name</th> <th>Last Name</th> <th>Counted For Item12</th> <th>Initial Action Taken</th> <th>Initial Action Date</th> </tr> </thead> <tbody> <tr> <td>2</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>3</td> <td>11930</td> <td>8/30/2008</td> <td>1/27/2008</td> <td>7758</td> <td>Jane</td> <td>Doe</td> <td>Yes</td> <td></td> <td></td> </tr> <tr> <td>4</td> <td>11931</td> <td>9/3/2008</td> <td>1/27/2008</td> <td>7758</td> <td>Jane</td> <td>Doe</td> <td>Yes</td> <td></td> <td></td> </tr> </tbody> </table>	1	RESPONSE INFORMATION			PARTICIPANT INFORMATION			ITEM 12				Unique Response Id	Date Survey Taken	Date On Inquiry Form	Participant Unique Id	First Name	Last Name	Counted For Item12	Initial Action Taken	Initial Action Date	2										3	11930	8/30/2008	1/27/2008	7758	Jane	Doe	Yes			4	11931	9/3/2008	1/27/2008	7758	Jane	Doe	Yes		
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## SMP Resources

The following SMP Resources, and more, are available on the SMP Resources Website: [www.smpresource.org](http://www.smpresource.org)

- SMART FACTS Handouts (in the SMP Resources section on the SMART FACTS page)
- SMART FACTS Operations Manual (in the Resource Library)
- OIG Report Web Conference Call Recording (1/21/09) (in the SMP Resources section on the Webinars page).

For additional questions, contact the National Consumer Protection Technical Resource Center at 1-877-808-2468