



# Getting Started

## Import/Export Utility

Requires Coach's Office® version 2.01.151 or greater.  
Download latest version from [www.coachsoffice.com](http://www.coachsoffice.com).  
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## Getting Started: Import/Export Utility

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The purpose of *Getting Started: Import/Export Utility* is to provide detailed information on how to back up your *Coach's Office*® database files and transfer them between computers. This feature requires Coach's Office (Standard or Pro) version 2.01.151 or greater (released January 26, 2005).

### Utility Overview

The *Import/Export Utility* exports a duplicate of the current database files being used by Coach's Office. That duplicate can then be imported to another computer that also has Coach's Office. If you are running Coach's Office on your work computer and your laptop at home, you can transfer the files from one computer hard drive to the other by using this utility.



Importing the database file overwrites – completely replaces – the current file.

Now Coach's Office provides a quick, easy way to back up its database files right from the Coach's Office desktop. The database files are: *formation.mdb* (chalkboard), *playbook.mdb* (playbook), and *script.mdb* (script).

### *Frequency of Making a Backup*

We recommend exporting the files whenever changes have been made to them. After a working session in Coach's Office and before exiting the program, back up the files you changed.



There are three ways to keep your data safe: back up, back up, back up!

### What Hardware Do I Need?

The *Import/Export Utility* copies files to a hard drive and possibly a floppy disk\*. We recommend using USB Pen drives that are about the size of a car keyless entry. (a.k.a. JumpDrive) They're inexpensive and highly portable. ZIP drives and other external hard drives work as well. You can also choose to import and export files across a network.

\* The utility compresses the files when importing and exporting, thereby making them smaller than the original. A floppy disk may have the capacity to hold the files, but the *playbook.mdb* file could be too large.

### About CDs

The utility imports database files from a CD, but cannot export them to a CD. The imported file from a CD must be unlocked before running Coach's Office. For detailed, step-by-step instructions on how to back up and transfer files using CDs and other media and resources such as Microsoft® Windows Explore, see our Web site section *Transfer Files*.

### Tip: Naming the Backup Folder

Do not rename the database files. Coach's Office looks for the exact name of the file as defined in the installation and will not find it if the name has been changed to *StansPlaybook.mdb*. To organize the backup files, consider naming the backup folder(s). For example, name the folder by back up date: *playbook\_012605*.

### Import/Export Utility

Review the following *Steps* and work through the exercises. The next time you import or export database files using the *Import/Export Utility*, the entire process should go very quickly.

## Steps:

- Attach an external drive that will be the import and/or export file location.
- Open the Coach's Office program.
- Right click the computer monitor on the Coach's Office desktop to open the *Import/Export Utility*.
  - The *Copy Files* screen appears.
- Step 1: Choose Import, Export, or Cancel.

### *Choosing Export:*

- Step 2: What file do you want to Export? Choose one.
  - Click either Formation (chalkboard), Playbook, Script, or Cancel.
- Step 3: Where do you want to Export the "chosen" file? (Where "chosen" is either Formation, Playbook, or Script.)
  - Click the dropdown arrow and choose the appropriate external drive location in the list.
    - Choosing the Local Drive C is not recommended. This location does not serve as a backup file against a hard drive crash or virus.
  - Double click through the folder structure (if any) to locate the folder to export the chosen file.
  - Click *OK*.
- Step 4: File was successfully copied.
  - Click *OK*.
  - Screen returns to Coach's Office desktop.

### *Choosing Import:*

- Step 2: What file do you want to Import? Choose one.
  - Click either Formation (chalkboard), Playbook, Script, or Cancel.
- Step 3: Where is the "chosen" file located that you want to import? (Where "chosen" is either Formation, Playbook, or Script.)
  - Click the dropdown arrow and click the appropriate external drive location in the list.
  - Double click through the folder structure (if any) to locate the folder that contains the chosen file.
    - Double clicking opens the folder to reveal any additional folders or the chosen file type.
    - If an open folder contains the chosen file type, it is listed in the white box near the bottom of the screen.
  - Click *OK*.
    - The current database file on the Local Drive C is overwritten (replaced) with the new database file.
- Step 4: File was successfully copied.
  - Click *OK*.
  - Screen returns to Coach's Office desktop.

### *Summary*

As you can tell from the above steps, this utility is easy to use. You could stop here, but we recommend that you at least read through the import and export exercises to see the screen captures, read the explanations, and review the cautions.

## Exercise: Export

- Attach the external drive source where the files will be imported or exported.

If the drive is attached after the utility is opened, the drive may not appear in the dropdown drive list.

- Open the *Import/Export Utility*. Right mouse click the computer monitor on the Coach's Office desktop.

When the mouse rolls over the monitor, the message reads, "Quit Program." Left click the mouse to exit the program. Right click the mouse to open the *Import/Export Utility*. The *Copy Files* window displays.

*Step 1: Import or Export a File? Choose one.*

- Choose whether to import or export a file. Click *Export*. (fig. 1)

Choose to import, export, or cancel. In this example, choose to export a file.

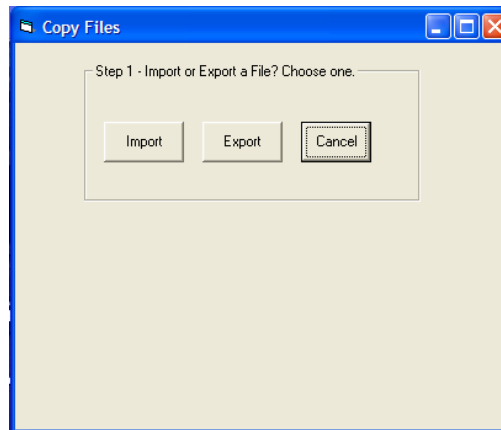


figure 1

*Step 2: What file do you want to Export? Choose one.*

- Choose to export the **Playbook** file by clicking the **Playbook** button. (fig. 2)

In this exercise, export the Playbook file.

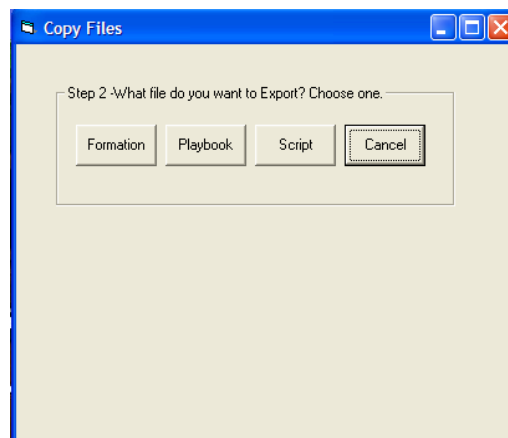


figure 2

*Step 3: Where do you want to Export the Playbook file?*

- Browse to select the export drive and folder location. (fig. 3a, 3b, 3c)

The utility knows the location of the file being exported, so you are not asked to locate it. The file is the one currently being used by Coach’s Office.

*Locate the Drive*

The screen that displays may look like figure 3a or be specific to your computer. Whatever the location that comes up in the screen, browse to find the export drive location by clicking the dropdown arrow. (fig. 3b) All attached drives appear in the dropdown list. If a drive was attached after opening the utility, it may not appear in the list. If this is the case, click *Cancel* and start again.

Select the appropriate drive location. In this example, it is drive “e.” (fig. 3b)

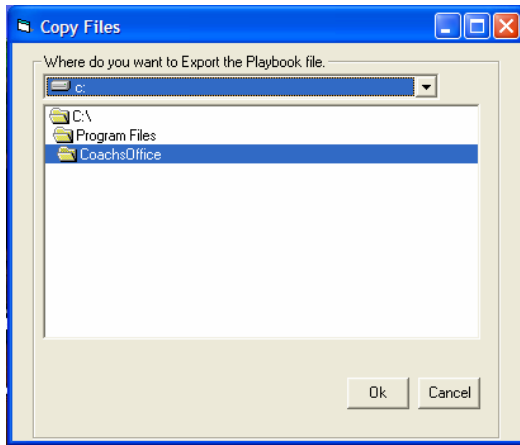


figure 3a

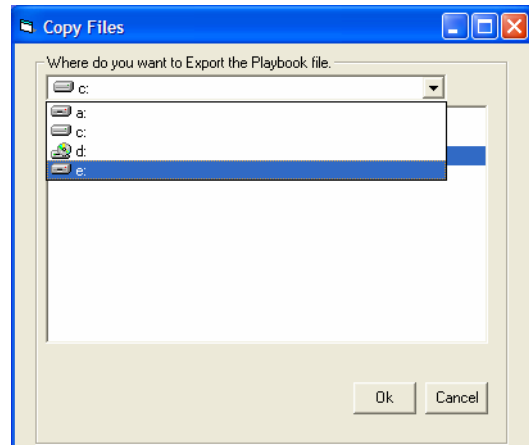


figure 3b

*Locate the Folder*

The export location may be to the root directory of the drive, in which case you do not select a folder. However, in this example, the file is being exported to a folder.

Double click through any folder structure until the destination folder is open. (fig. 3c)

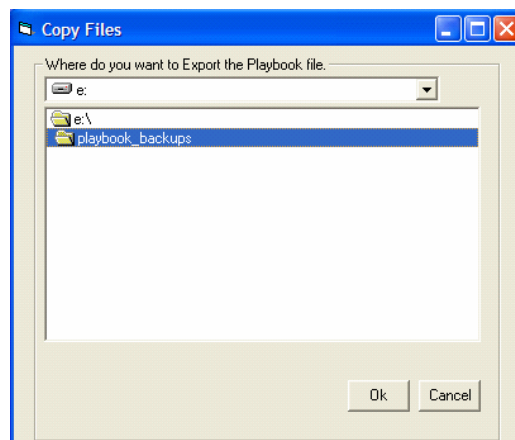



figure 3c

Now both the drive and folder locations are specified.

Step 4: Finalize the exporting of the file.

- Accept the export drive and folder destination. Click *OK* to export the file. (fig. 4a, 4b)

The drive and folder destinations are selected. Click *OK* to export the file. A brief message displays stating “Copying file. Please do not interrupt.” (fig. 4a) For smaller files being exported, the message may display and disappear before it can be read.

 Exporting a file to a folder that already contains the file type (ex. Playbook.mdb) overwrites the existing file – without a warning.

The screen displays that the file was successfully copied (exported).

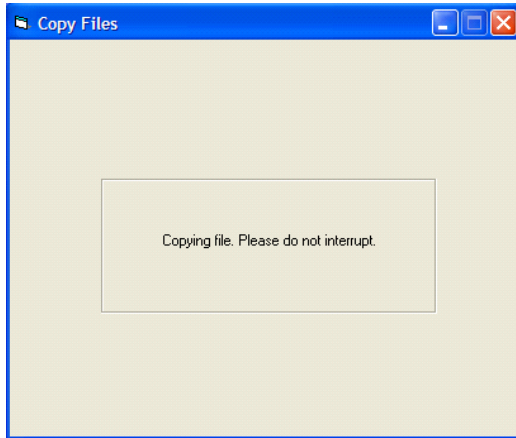


figure 4a

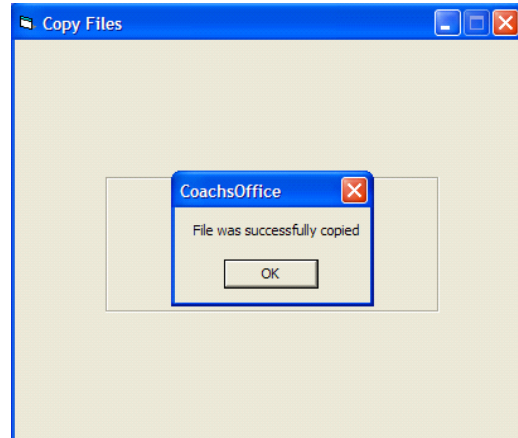


figure 4b

Return to Coach’s Office Desktop

- Return to Coach’s Office desktop. Click *OK*. (fig. 4b)

Click *OK* and return to the Coach’s Office desktop.

## Exercise: Import

Importing files is as simple as exporting them, but there is an additional step in locating the file(s) and also a caution reminder.

- Attach the external drive source where the files will be imported or exported.

If the drive is attached after the utility is opened, the drive may not appear in the dropdown drive list.

- Open the *Import/Export Utility*. Right mouse click the computer monitor on the Coach's Office desktop.

When the mouse rolls over the monitor, the message reads, "Quit Program." Left click the mouse to exit the program. Right click the mouse to access the *Import/Export Utility*. The *Copy Files* window displays.

*Step 1: Import or Export a File? Choose one.*

- Choose whether to import or export a file. Click *Import*. (fig. 1)

Choose to import, export, or cancel. In this example, choose to import a file.

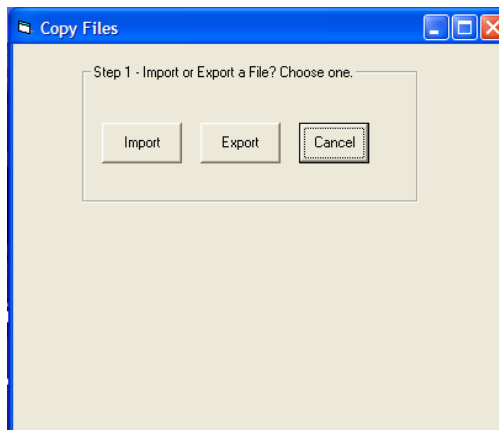


figure 1

*Step 2: What file do you want to Import? Choose one.*

- Choose to import the *Playbook* file by clicking the *Playbook* button. (fig. 2)

In this exercise, import the *Playbook* file.

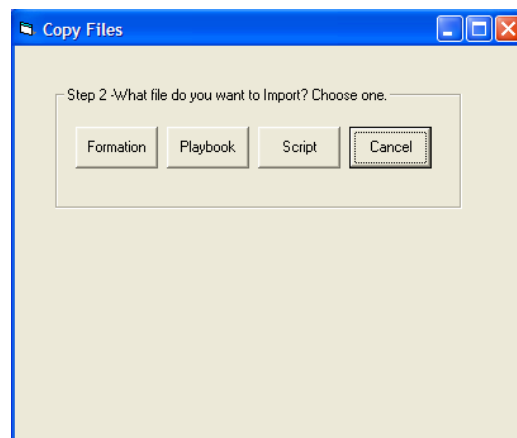



figure 2

*Step 3: Where is the Playbook file you want to import?*

- Browse to select the import drive and folder location. (fig. 3a, 3b, 3c)

The utility knows where the file is that is going to be replaced, it is your current Playbook database on the Local Drive C. You have to locate the file to be imported.

 Importing a file overwrites – completely replaces – the current file. Be sure to have a backup of the original file in the event it needs to be restored.

*Locate the Drive*

The screen that displays may look like figure 3a or be specific to your computer. Whatever the location that comes up in the screen, browse to find the import drive location by clicking the dropdown arrow. (fig. 3b) All attached drives appear in the dropdown list. If a drive was attached after opening the utility, it may not appear in the list. If this is the case, click *Cancel* and start again.

Select the appropriate drive location. In this example, it is drive “e.” (fig. 3b)

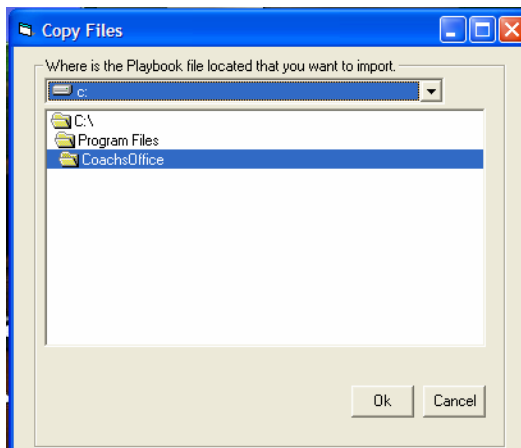


figure 3a

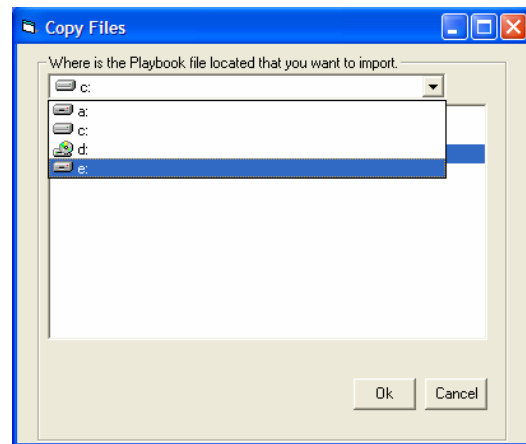


figure 3b

*Locate the Folder*

The import location may be from the root directory of the drive, in which case you do not select a folder. However, in this example, the file is being imported from a folder.

Double click through any folder structure until the destination folder is open. (fig. 3c)

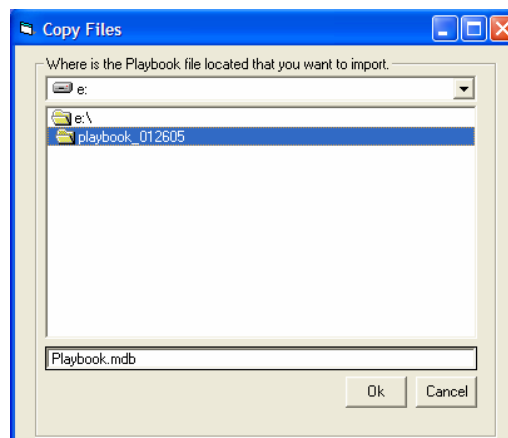


figure 3c


This screen is different from the one that shows the export drive and folder destination. When importing a file, the file type – in this case Playbook.mdb – appears in a box at the bottom of the screen if it is in the open folder. (fig. 3c)

Now both the drive and folder locations are specified.

*Step 4: Finalize the importing of the file.*

- Accept the import file location of the drive and folder. Click *OK* to import the file. (fig. 4a, 4b)

The drive and folder that contain the Playbook.mdb file are selected. Click *OK* to import the file. A brief message displays stating “Copying file. Please do not interrupt.” (fig. 4a) For smaller files being written to the local drive, the message may display and disappear before it can be read.

 Importing a file overwrites the current Coach’s Office file – without a warning.

The screen displays that the file was successfully copied (imported). When you open the Playbook module in Coach’s Office, the newly imported playbook is there.

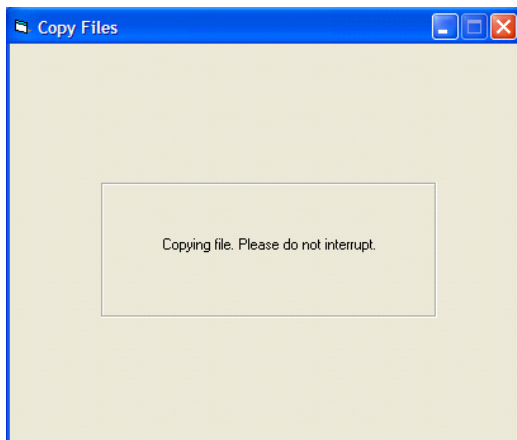


figure 4a

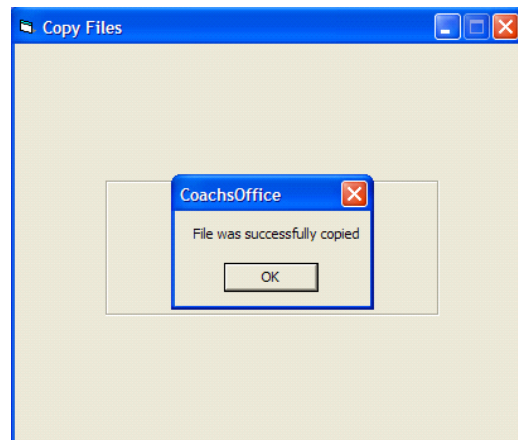


figure 4b

*Return to Coach’s Office Desktop*

- Return to Coach’s Office desktop. Click *OK*. (fig. 4b)

Click *OK* and return to the Coach’s Office desktop.