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## Construction Superintendent Data Export Guide

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### Overview

The Data Export add-on module (“Module”) allows you to export certain data that you’ve entered into the Construction Superintendent app (“App”) to use in spreadsheets and/or subsequently import into downstream systems or databases used in your firm’s back-office.

This version of the Module deals with employee timesheet data entered in the Personnel Time form.

### Export Mechanism

#### CSV Files

Data is exported from the App in the form of Comma Separated Values files or “CSV” files. CSV files are a common, handy way of getting data out of one application and into another for applications that weren’t necessarily designed to interact with each other.

CSV is a simple, text-based format that lends itself to representing data sets typically found in a spreadsheet or a database table. It will open into Excel with a double click and nearly all databases and most accounting / management systems have a tool to allow importing data from CSV files. And, since they are text-based, you can open, read and edit them in any word processing or text editor application.

The first line of the file can optionally be a “header record” containing names of the fields (or columns) in the data records. The rest of the lines in the file contain data values (in readable text), separated by a delimiter – typically a comma. The App allows you to control the content and attributes of the file to meet your specific requirements – set the Settings and Controls section below for details.

#### Export Process

After you’ve submitted Personnel Time form(s) for a week, you can also generate associated CSV file(s) containing the daily work time details of project activity for that week.

From the main menu, tap “Personnel Time”, then tap the folder icon in the header bar to open the “Submitted Personnel Time History” page. Locate the timesheet submission you’d like exported, then tap the “Export” link in that cell. That will open a new e-Mail draft with the data export file attached. Take a look to be sure it’s addressed to where you want it to go (see Settings and Controls below) and tap “Send”. The recipient(s) can then use the data export file attached to the e-Mail message for whatever local or downstream processing purposes needed.

## Settings and Controls

The App gives you control over the content and format of the data export (CSV) file, allowing you to tailor it for use in your back office systems. To access the configuration settings, tap “Master Settings” on the main menu. Then, on the Master Setting page, tap “Master Forms Settings” and on that page, tap “Personnel Time Export”.

### Data Export Delivery Contacts

Specify one or more e-Mail addresses for delivery of the data export file. If you leave this blank, you’ll need to enter address(es) every time you send a file.

### General Settings

These settings affect the general attributes of the data export file:

**Record Type** specifies the type of detail data records contained in the export file.

- **Weekly:** causes the file to contain data records with Hours values for all seven days of the week in one data record (for each project activity / cost code). In this case, the “Date” field in the data record represents the date of the first of the seven days of Hours values.
- **Daily:** causes the file to contain data records with Hours values for a single day of the week in each data record (for each project activity / cost code).

**Include Header Record** controls whether or not the first record in the file contains “column header” labels for the associated fields in the data records.

**Filename Extension** For compatibility with some downstream applications, you can choose to have the filename extension set to “.csv” (default), “.txt” or not have an extension as part for the file name (None).

**Field Separator** By default, the character used to separate fields in the data records is a Comma (“,”). For compatibility with some downstream applications, you can specify that fields are separated by a Pipe character (“|”) or a Tab instead.

**Uppercase** Setting this to “Yes” forces all text values to be exported in uppercase (capital) letters. Setting it to “No” exports text values as you originally entered them into the app.

## Record Settings

This settings table in this section controls: which of the available Personnel Time data elements should appear in the data records of the export file, how they should be formatted, what their associated header record label should be, and in what order they should appear. Manipulating these settings allow you to generate the data export files with the content and in the format that is most usable by your back-office accounting systems or the spreadsheets you want to manage.

There's a row in the table for each available data element in the App, e.g. Personnel ID, Name, Job ID, Cost Code, Date, Hours... etc. In each row, for the associated data element, you can specify:

**Included** On the far-right side of the row is a column labeled "Included". A small blue checkmark indicates that the data element will be included in the data export file. To exclude it from the file, tap the checkmark to turn it off. To include a missing data element, tap the blank area to turn it back on.

**Header Label** specifies the text value of the column header for the data element that appears in the Header Record (if you've selected it to be included in the data export file). Its default value is the same as the name of the data element in the App. For example, you might choose to change the column header for the "Cost Code" data element to be "Activity Code". Simply tap the Header Label text box in the settings row for "Cost Code" and change it to whatever you'd like it to be.

**Formatting** There are some simple formatting controls for each type of data element...

Most of the data elements are exported as text fields. For those, you can specify Field Size limits. For example, your accounting system may limit the length of a project name to 30 characters. In that case, you could set the **Limit Field Size** switch to "Yes" for that data element. When you do that, a settings field appears that says "**Max Character Length**" and you can type 30 into that box. Then, when data records are exported, any longer project names will be cut off at 30 character.

Some data elements (e.g. Hours and Standard Cost) are numeric values. You can specify the number of **Decimal Places** used when representing those values in the data records.

Various **month/day/year** formatting styles are provided for the "Date" data element.

To control the **Order** in which the selected fields appear within a data record, tap the [Edit](#) link at the top right corner of the Personnel Time Export Settings page. Row-drag icons will appear on the far-right side of the settings rows. Tap and hold there, then drag the row up or down to adjust its order in the list – top of the list will be first in the data record ... bottom of the list last. When you have it arranged as you like, tap the [Done](#) link at the top right corner of the page.