

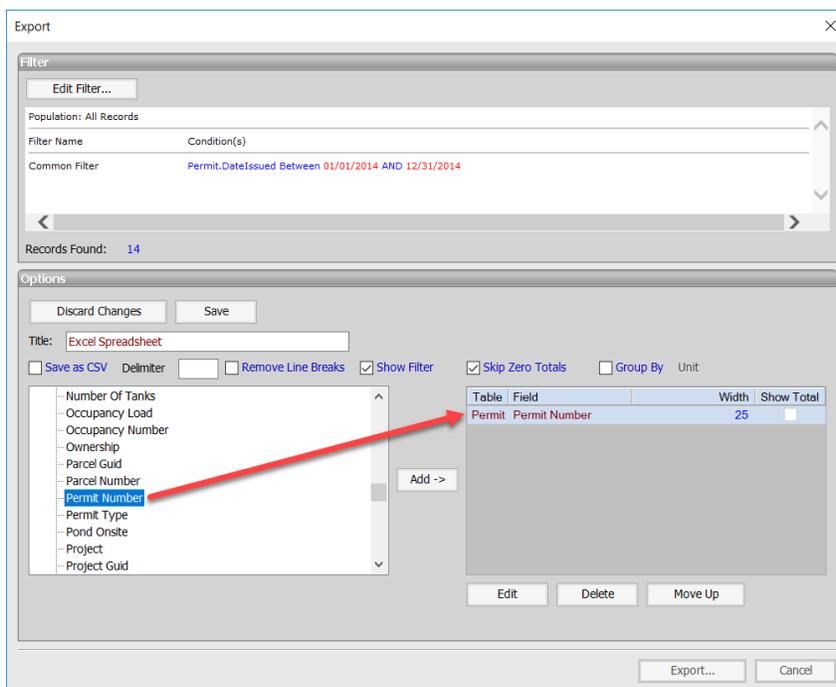
Excel Export

Questions? From your BS&A program, go to **Help>Contact Customer Support** and select **Request Support Phone Call or Email Support**. Or, you may call us at (855) 272-7638 and ask for the appropriate support department. Questions for our I.T. department may be submitted by phone (same number), or by emailing tech@bsasoftware.com.

The Excel export is an alternative to the Report Designer, and is available on most tables. An Excel export is an easier way to select data, and group and sum that data. Excel gives you even more flexibility and control over how your data is represented. Finally, you may export these "export definitions" for import into another BD database, or to act as a backup.¹

Due to the vast amount of data available for export, it is easiest to illustrate this process by using a specific example; in this case, the Permit table. We will set a simple filter on this table, which is not required. You may choose to block or mark the records to export, and you can select that as the population. Some familiarity with Excel is expected.

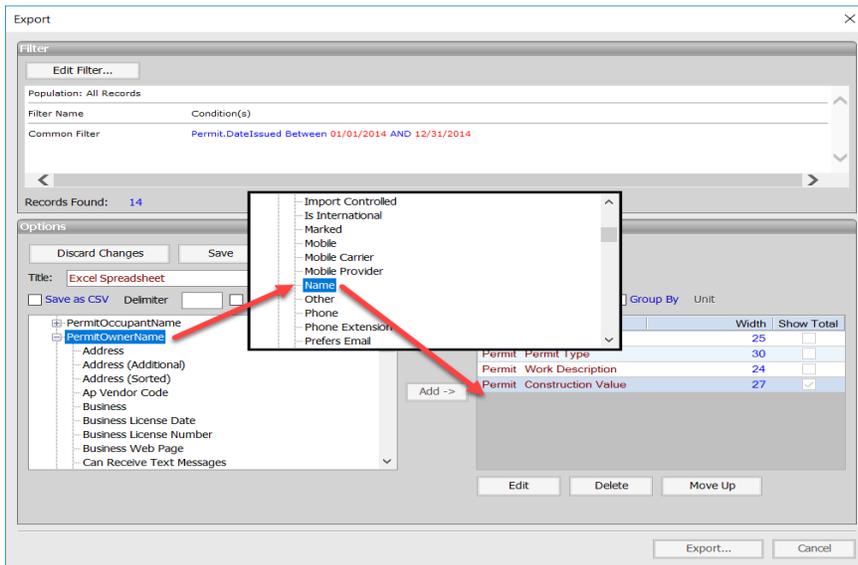
1. Open the Permit table.
2. Click the Excel button in the Tool Bar.
3. Click Edit Filter.
4. Select All Records as the Population.
5. On the Common Report Filter Options tab, click the **Edit** command link by Date Issued.
6. Select Between as the Operator.
7. On the Compare To pane, select Value and enter a valid date range (a date range in your database).
8. Click Ok>Close. You return to the Export screen.
9. Click the grey Add button.
10. Enter the Export Title and click Ok.
11. Scroll through the fields in the Options pane until you see Permit Number. Double-click on it to move it to the right:



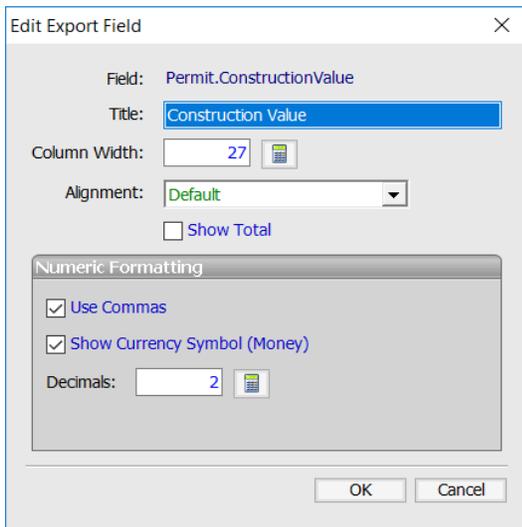
12. Repeat for Permit Type, Work Description, and Construction Value.

¹File>Export>Export Definitions

13. Scroll up until you see Permit Owner Name. Double-click to expand Permit Owner Name, scroll through those fields until you see Name, and double-click it to add it to the list on the right.

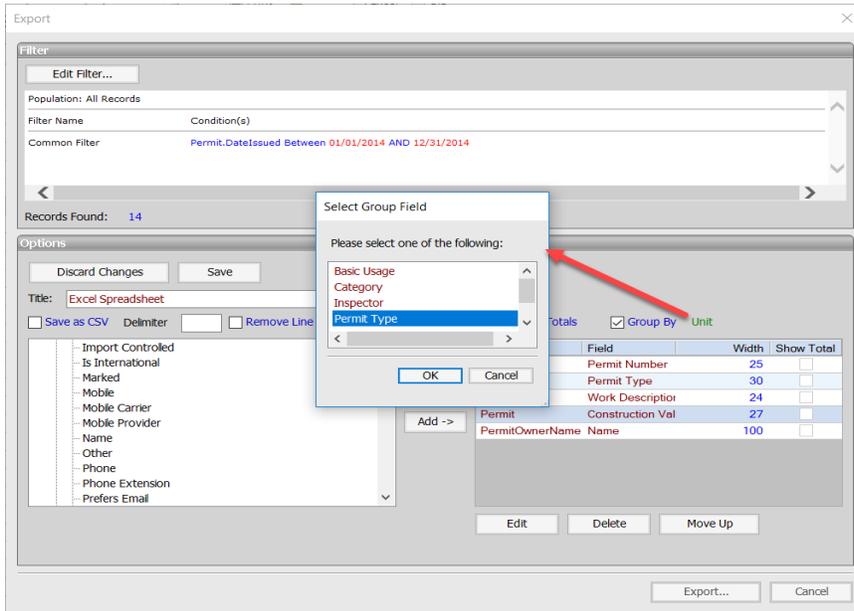


14. Optional. Use the Move Up and Move Down buttons to change the order of the fields.
15. Optional. Double-click a selected field to edit its attributes. As an example, pictured are the attributes for the Construction Value field. Among other things, you can change the name of the field to appear in the spreadsheet (Title field):



Click Ok to return to the Export screen.

16. Turn on the Group By setting and click the **Unit** command link. Double-click Permit Type.



17. Click the Save button.

18. Verify/select the Exporting To location.

19. Click the Export button. The spreadsheet appears. If you elected to Group By, as in this example, each type of data for which there is a separate group appears on subsequent worksheets of the Excel file. The Export Title is the first worksheet:

