RefinemySite

Excel Export Tutorial

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1 Preface

This document will guide you to export your data from RefinemySite to Microsoft Excel.

By following this step-by-step guide, you will connect Excel to RefinemySite to fill the downloaded template with your data from RefinemySite.

The data includes all your projects along with user and company information of project participants.

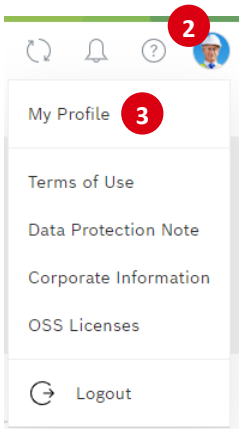
Please don't hesitate to contact us If you encounter any difficulties.

2 Prerequisites

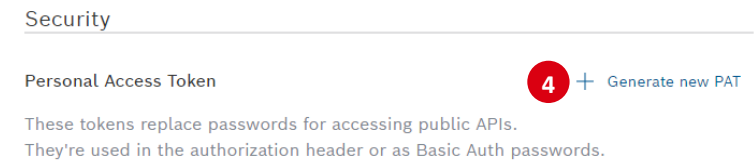
The following screenshots assume that you use "Microsoft Excel for Microsoft 365", which is a typical setup for enterprise users. If you use a different version, the screenshots in this document might differ from what you see on your screen.

3 Creating a Personal Access Token (PAT)

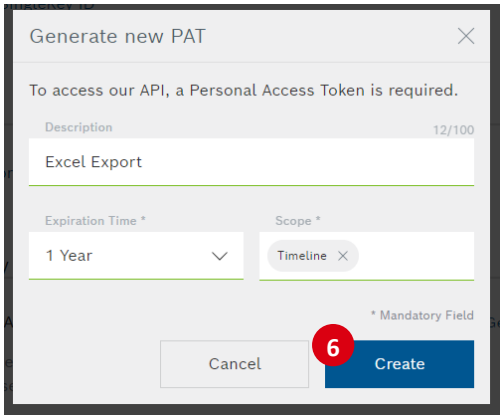
To connect to RefinemySite from Excel, you must create a Personal Access Token (PAT). The following steps will guide you through the creation of your PAT.



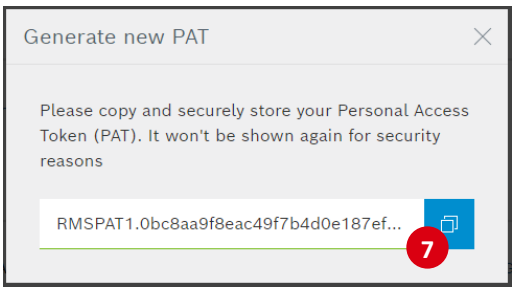
1. Log in to RefinemySite.
2. Click on your profile picture.
3. Select **My Profile**.



4. Scroll down to the Security section and click **Generate new PAT**.



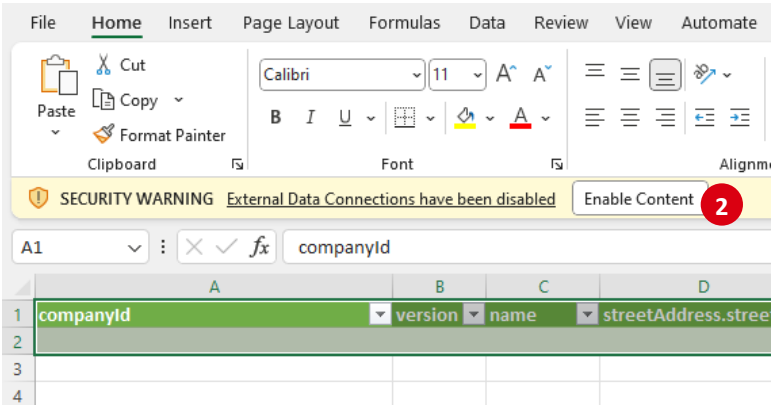
5. In the dialog that appeared, enter
   a. a description (e.g., "Excel Export")
   b. an expiration time (e.g., "1 Year")
   c. the scope "Timeline"
6. Click **Create**



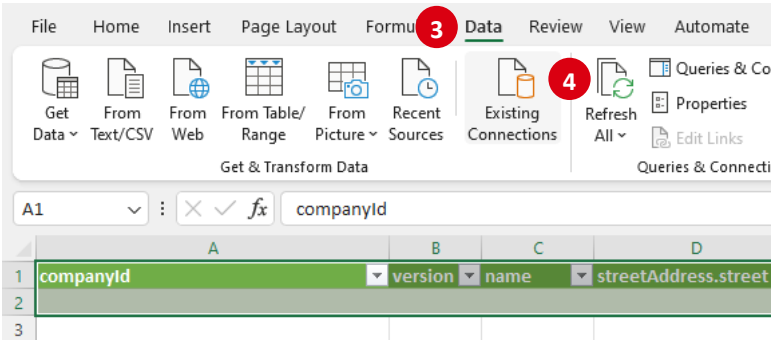
7. Click the blue copy icon to copy the PAT into the clipboard. Store the PAT somewhere safe, you will need it in one of the next steps.
8. You can close the dialog now.

Please remember to treat the created PAT as a password and keep it in a safe place.
Your password manager would be an ideal place. Don't share your PAT with anyone.

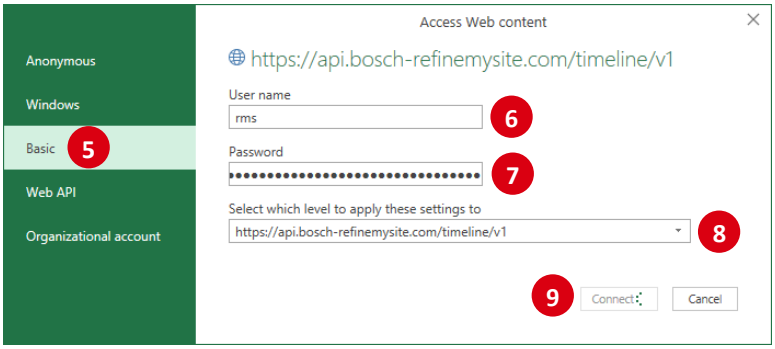
4 Loading Data from RefinemySite into Excel



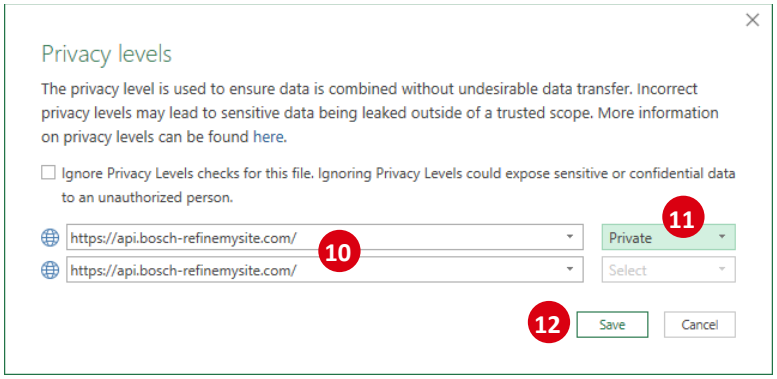
1. Open the Excel file located next to this tutorial in the downloaded zip file.
2. Click on **Enable Content** to dismiss the security warning.



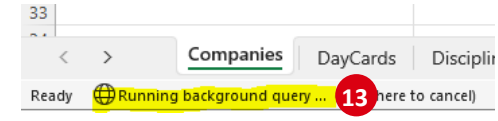
3. Open the **Data** tab.
4. Click on **Refresh All**.

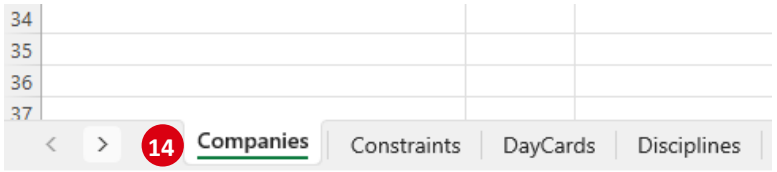


5. Once the dialog on the left appears, click on **Basic**. It may take a while for the dialog to appear.
6. Enter rms as **user name**.
7. Enter your PAT created earlier as **password**.
8. In the drop-down box, select the value as shown on the left.
9. Click **Connect**.



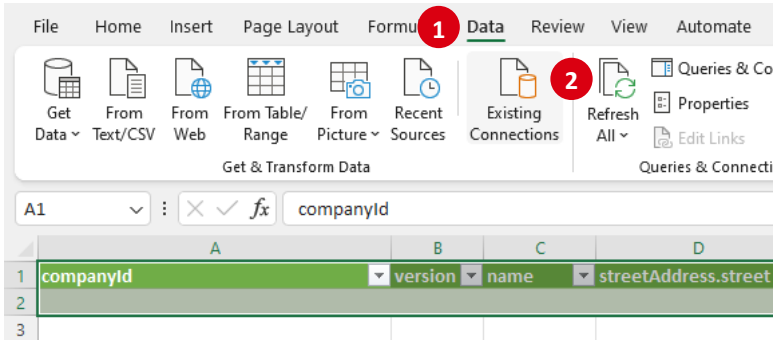
10. Once the dialog on the left appears, select the shown values for both drop-down boxes. It may take a while for the dialog to appear.
11. Select **Private**.
12. Click **Save** and lean back.
    It may take a couple of minutes to load your data into Excel.





13. At the bottom left, you can see the loading indicator. While Excel is displaying a “running background query”, the loading is still in progress. Please wait until the loading indicator disappears.
14. After the loading is complete, you can navigate through the different worksheets at the bottom left of the screen.

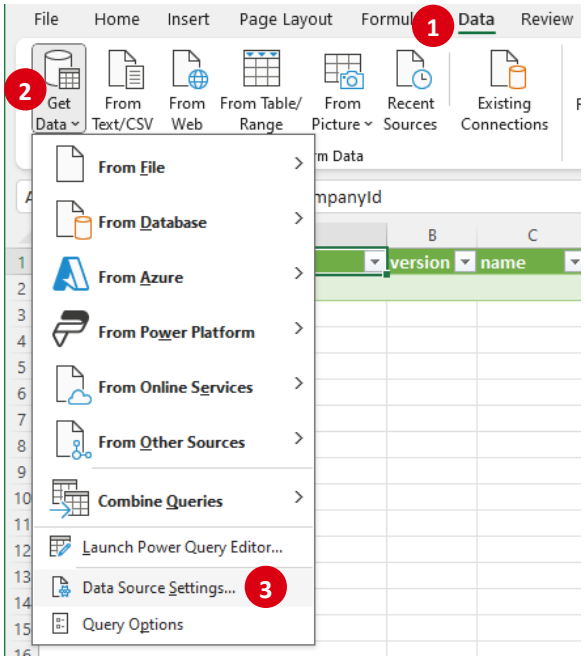
5 Refreshing the Data (optional)



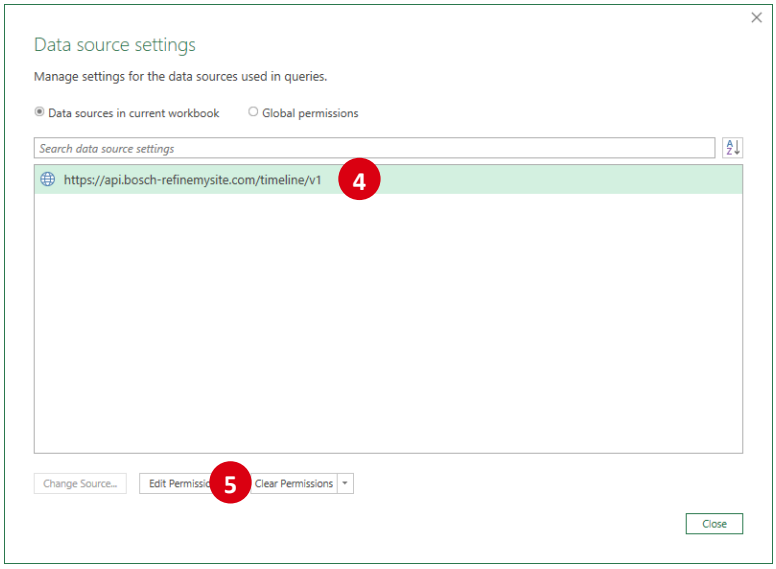
1. Open the **Data** tab.
2. Click on **Refresh All** and lean back.
   It may take a couple of minutes to load your data into Excel.

6 Changing the Personal Access Token (PAT)

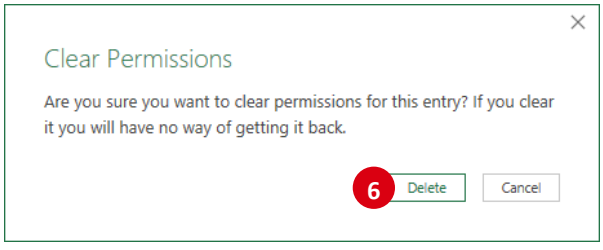
To change the stored PAT, follow these steps.



1. Open the **Data** tab.
2. Click **Get Data**.
3. Click **Data Source Settings…**



4. Select the shown entry.
5. Click **Clear Permissions**.



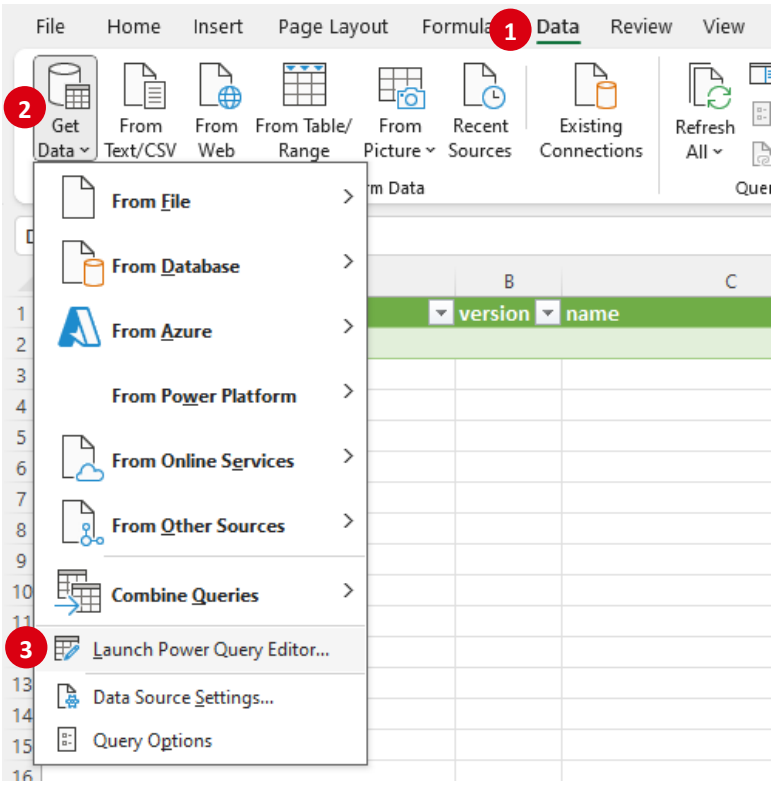
6. In the dialog that appeared, click **Delete**.
7. You can close the Data source settings dialog now. To enter a new PAT, refresh the data (cf. chapter 5).

7 Loading Historic Data (optional)

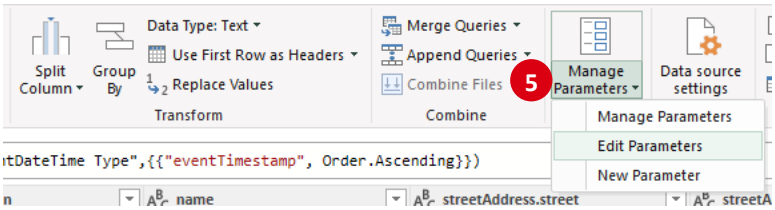
By default, the Excel template loads only data that is visible in RefinemySite at the time of loading. For example, after you rename a task, it will appear in Excel with its new name. You can no longer tell that the task was renamed or what its pevious name was. We call this loading mode **Latest Snapshot**.

If you are interested in the entire history of your data, the Excel template offers a second loading mode called **Historic Data**. For example, after renaming a task, it will appear twice in Excel. One row represents the task before it was renamed, and another row represents the task after it was renamed.

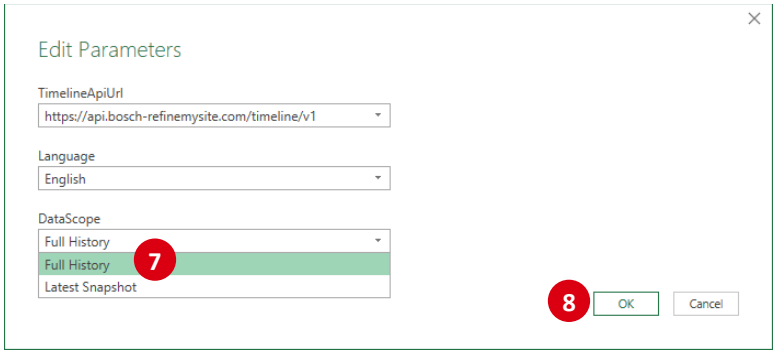
In order to switch the loading mode to Historic Data, follow the steps below.



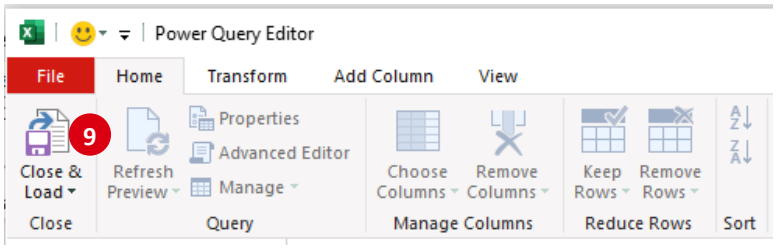
8. Open the **Data** tab.
9. Click **Get Data**.
10. Click **Launch Power Query Editor…**



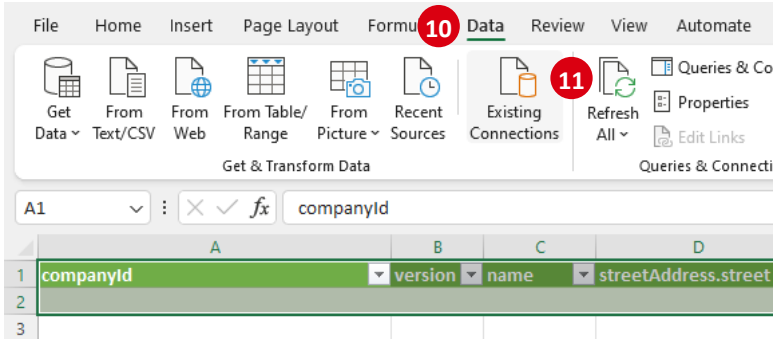
11. Make sure the **Home** tab is selected.
12. Click the bottom part of **Manage Parameters**, i.e., click on the label not the icon.
13. Click **Edit Parameters**.



14. Select **Full History**.
15. Click **OK**.



16. Click **Close & Load**



17. Open the **Data** tab
18. Click on **Refresh All** and lean back.
    It may take a couple of minutes to load your data into Excel.

8 Worksheets

This section documents the different worksheets available. Each worksheet holds the data of a single type of data type.

8.1 Common Columns

All worksheets have the following columns in common.

Column Name	Description
version	The version of the item represented by this row. The version starts at 0 and is incremented by one whenever the item is modified, except in a few cases mentioned below.
deleted	TRUE if this item has been deleted, else FALSE. In **Latest Snapshot** mode (cf. chapter 7), this column will always be FALSE because deleted items are excluded in that mode. Use **Historic Data** mode to include deleted items as well.
eventTimestamp	The date and time this item was created or modified. This is a Unix timestamp in milliseconds, i.e., it measures the milliseconds elapsed since 00:00:00 UTC on 1st January 1970.
eventDateTime	The date and time this item was created or modified, in the local time zone.

8.2 Companies

The companies of participants in your projects.

Column Name	Description
companyId	The globally unique identifier of the company.
name	The name of the company.
streetAddress.street	The street of the street address
streetAddress.houseNumber	The house number of the street address
streetAddress.city	The city of the street address
streetAddress.zipCode	The zip code of the street address
streetAddress.country	The country of the street address
postBoxAddress.postBox	The post box of the P.O. Box Address
postBoxAddress.city	The city of the P.O. Box Address

postBoxAddress.zipCode	The zip code of the P.O. Box Address
postBoxAddress.country	The country of the P.O. Box Address

8.3 Day Cards

The day cards created for tasks in your projects.

Column Name	**Description**
dayCardId	The globally unique identifier of the day card.
projectId	The globally unique identifier of the project to which the day card belongs.
taskId	The globally unique identifier of the task to which the day card belongs.
date	The date of the day card.
statusKey	The status of the day card. Possible values are: • DAY_CARD_STATUS_OPEN • DAY_CARD_STATUS_DONE • DAY_CARD_STATUS_NOT_DONE • DAY_CARD_STATUS_APPROVED
statusName	The name of the status.
title	The title of the day card.
manpower	The manpower of the day card.
notes	The notes of the day card.
reason	The reason for variance if statusKey is DAY_CARD_STATUS_NOT_DONE, otherwise blank.

8.4 Disciplines

The disciplines configured for your projects.

Column Name	**Description**
disciplineId	The globally unique identifier of the discipline.
projectId	The globally unique identifier of the project to which the discipline belongs.

name	The name of the discipline.
color	The color used for representing the discipline.

8.5 Milestones

The milestones created in your projects.

Column Name	**Description**
milestoneId	The globally unique identifier of the milestone.
projectId	The globally unique identifier of the project to which the milestone belongs.
name	The name of the milestone.
description	The description of the milestone.
date	The date of the milestone.
global	TRUE if the milestone is a global milestone, else FALSE. A global milestone is a milestone that appears in the calendar header above all working areas.
typeKey	The type of the milestone. Possible values are: • MILESTONE_TYPE_PROJECT • MILESTONE_TYPE_CRAFT • MILESTONE_TYPE_INVESTOR
typeName	The name of the milestone type.
disciplineId	The globally unique identifier of the discipline if typeKey is MILESTONE_TYPE_CRAFT, else blank.
workAreaId	The globally unique identifier of the working area to which this milestone belongs, or blank if this is a global milestone. If workingAreaId is blank and global is FALSE, this means the milestone belongs to the “Without working area” calendar swimlane.

8.6 Non-Working Days

The non-working days configured in the project settings.

Column Name	Description
workingDayConfigurationId	The globally unique identifier of the working day configuration. A working day configuration includes working days and non-working days. This means, there is typically a corresponding row in the Working Days sheet (cf. section 8.17) with the same workingDayConfigurationId.
projectId	The globally unique identifier of the project to which the non-working day belongs.
name	The name of the non-working day.
date	The date of the non-working day.

8.7 Participants

The participants in your projects. Includes only participants who completed the invitation process.

Note: In **Latest Snapshot** mode (cf. chapter 7), inactive participants are excluded.

Column Name	Description
participantId	The globally unique identifier of the participant.
projectId	The globally unique identifier of the project to which the participant belongs.
companyId	The globally unique identifier of the company to which the participant belongs.
userId	The globally unique identifier of the user to which the participant belongs.
roleKey	The role of the participant in the project. Possible values are: • PARTICIPANT_ROLE_SUPERINTENDENT • PARTICIPANT_ROLE_COMPANY_REPRESENTATIVE • PARTICIPANT_ROLE_FOREMAN
roleName	The name of the participant's role in the project.
active	TRUE if the participant is active, else FALSE.

8.8 Projects

The projects in which you are a participant.

Note: The deletion of a project is a hard deletion. This means, even in **Historic Data** mode (cf. chapter 7), the project data is gone, including all data previously contained in that project, i.e., Tasks, Milestones, etc. This is why the Projects worksheet does not have a “deleted” column.

Column Name	Description
projectId	The globally unique identifier of the project.
title	The title of the project.
start	The start date of the project. Note: This date is not automatically adjusted if there are tasks or milestones that start earlier.
end	The end date configured for the project. Note: This date is not automatically adjusted if there are tasks or milestones that end later.
projectNumber	The project number of the project.
client	The client of the project.
description	The description of the project.
categoryKey	The category of the project, or empty. Possible values are: • PROJECT_CATEGORY_NEW_BUILDING • PROJECT_CATEGORY_RENOVATION • PROJECT_CATEGORY_RECONSTRUCTION
categoryName	The name of the project category.
city	The city of the project.
houseNumber	The house number of the project.
street	The street of the project.
zipCode	The zip code of the project.

8.9 Reasons for Variance

The “Reasons for variance” (RFV) configured in the project settings. There are ten built-in reasons and up to four custom reasons. The main difference is that custom reasons have a customizable name whereas the name of built-in reasons is fixed.

Column Name	**Description**
rfvId	The unique identifier of the RFV. This identifier is only unique within the project. It’s not globally unique.
version	The version of this RFV. For built-in RFVs, the version is always -1. For custom RFVs, ▪ the version is -1 as long as the RFV is not yet customized, i.e., as long as it is still inactive, and its name has not been changed. ▪ the version is >= 0 when the RFV has been customized by activating it or changing its name. The version is incremented by one whenever the RFV is modified. ▪ the version becomes -1 again when deactivating the RFV and setting an empty name.
projectId	The globally unique identifier of the project to which the RFV belongs.
key	The key used for this RFV to reference it in day cards (cf. section 8.3).
name	The name of the RFV.
active	TRUE if the RFV is active, or FALSE if it has been deactivated in the project settings.
deleted	Always FALSE because a RFV cannot be deleted.
eventTimestamp	For built-in RFVs, eventTimestamp is always 0. For custom RFVs, ▪ the eventTimestamp is 0 as long as the RFV is not yet customized, i.e., as long as it is still inactive, and its name has not been changed. ▪ the eventTimestamp behaves as specified in section 8.1. when the RFV has been customized by activating it or changing its name. ▪ the eventTimestamp becomes 0 again when deactivating the RFV and setting an empty name.
eventDateTime	For built-in RFVs, eventDateTime is always blank. For custom RFVs, ▪ the eventDateTime is blank as long as the RFV is not yet customized, i.e., as long as it is still inactive, and its name has not been changed. ▪ the eventDateTime behaves as specified in section 8.1. when the RFV has been customized by activating it or changing its name.

- the eventDateTime becomes blank again when deactivating the RFV and setting an empty name.

8.10 Relations

The relations created in your projects.

Relations express that tasks and/or milestones are related in a certain way. This could be a predecessor/successor dependency (finish-to-start relation), or a subtask relation between a task and a milestone (part-of relation).

A relation is directed. The resource on the left side is called the source, the resource on the right side is called the target.

The **finish-to-start** relation is a dependency well known in project management. It means that the source must be finished before work on the target can start. Therefore, the source is a predecessor of the target, and the target is a successor of the source. This relation can be created between any combination of tasks and milestones:

- task (source) → task (target)
- task (source) → milestone (target)
- milestone (source) → milestone (target)
- milestone (source) → task (target)

The **part-of** relation is used to establish a subtask relation between a task and a milestone. It expresses that the task is required to finish the milestone. The source is always a task and the target is always a milestone. Therefore, the only valid combination is:

- task (source) → milestone (target)

Column Name	Description
relationId	The globally unique identifier of the relation.
projectId	The globally unique identifier of the project to which the relation belongs.
critical	TRUE if the relation is critical, else FALSE. Always FALSE for part-of relations. A finish-to-start relation is critical if the successor's (start) date is after the (end) date of the predecessor.
type	The type of the relation.
sourceId	The globally unique identifier of the source, i.e., of the task or milestone.
sourceType	The type of the source, either TASK or MILESTONE.
targetId	The globally unique identifier of the target, i.e., of the task or milestone.
targetType	The type of the target, either TASK or MILESTONE.

8.11 Tasks

The tasks created in your projects.

Column Name	Description
taskId	The globally unique identifier of the task.
projectId	The globally unique identifier of the project to which the task belongs.
name	The name of the task.
disciplineId	The globally unique identifier of the discipline to which the task belongs.
statusKey	The status of the task. Possible values are: • TASK_STATUS_ACCEPTED • TASK_STATUS_DONE • TASK_STATUS_DRAFT • TASK_STATUS_IN_PROGRESS • TASK_STATUS_OPEN
statusName	The name of the status of the task.
workAreaId	The globally unique identifier of the working area to which the task belongs, or blank if the task does not belong to a working area.
assigneeId	The globally unique identifier of the participant to whom the task is assigned, or blank of the task is not assigned.
start	The start date of the task, or blank if not start is set.
end	The end date of the task, or blank if no end is set.

8.12 Task Constraint Types

The “Constraints” configured in the project settings. There are eight built-in constraint types and up to four custom constraint types. The main difference is that custom constraint types have a customizable name whereas the name of built-in constraint types is fixed.

Column Name	Description
constraintId	The unique identifier of the constraint type. This identifier is only unique within the project. It’s not globally unique.
version	The version of this constraint type. For built-in constraint types, the version is always -1. For custom constraint types,

	▪ the version is -1 as long as the constraint type is not yet customized, i.e., as long as it is still inactive, and its name has not been changed. ▪ the version is >= 0 when the constraint type has been customized by activating it or changing its name. The version is incremented by one whenever the constraint type is modified. ▪ the version becomes -1 again when deactivating the constraint type and setting an empty name.
projectId	The globally unique identifier of the project to which the constraint type belongs.
key	The key used for this constraint type to reference it in Task Constraints (cf. section 8.13).
name	The name of the task constraint type.
active	Whether this constraint type is active or was deactivated in the project settings.
deleted	Always FALSE because a constraint type cannot be deleted.
eventTimestamp	For built-in constraint types, eventTimestamp is always 0. For custom constraint types, ▪ the eventTimestamp is 0 as long as the constraint type is not yet customized, i.e., as long as it is still inactive, and its name has not been changed. ▪ the eventTimestamp behaves as specified in section 8.1. when the constraint type has been customized by activating it or changing its name. ▪ the eventTimestamp becomes 0 again when deactivating the constraint type and setting an empty name.
eventDateTime	For built-in constraint types, eventDateTime is always blank. For custom constraint types, ▪ the eventDateTime is blank as long as the constraint type is not yet customized, i.e., as long as it is still inactive, and its name has not been changed. ▪ the eventDateTime behaves as specified in section 8.1. when the constraint type has been customized by activating it or changing its name. ▪ the eventDateTime becomes blank again when deactivating the constraint type and setting an empty name.

8.13 Task Constraints

The task constraints that have been added to tasks in your projects.

Column Name	Description
constraintSelectionId	The globally unique identifier of the constraint selection. A constraint selection holds one ore more selected constraints. It is created when a constraint is added to a task that doesn't have a constraint selection yet. Additional constraints are added to the existing constraint selection. When the last constraint in a constraint selection is removed/resolved, the constraint selection is deleted.
projectId	The globally unique identifier of the project to which the constraint selection belongs.
taskId	The globally unique identifier of the task to which the constraint selection belongs.
key	The key of the task constraint type (cf. section 8.12).

8.14 Topics

The topics created in your projects.

Column Name	Description
topicId	The globally unique identifier of the topic.
projectId	The globally unique identifier of the project to which the topic belongs.
taskId	The globally unique identifier of the task to which the topic belongs.
description	The description of the topic.
critical	TRUE if this topic has been marked as critical, FALSE else.

8.15 Users

The users of participants in your projects.

Column Name	Description
userId	The globally unique identifier of the user.
firstName	The first name of the user.
lastName	The last name of the user.

email	The email address of the user.
position	The position of the user.
locale	The locale of the user.
country	The country of the user.

8.16 Working Areas

The working areas created in your projects.

Column Name	**Description**
workAreaId	The globally unique identifier of the working area.
projectId	The globally unique identifier of the project to which the working area belongs.
name	The name of the working area.

8.17 Working Days

The working days configured in your projects.

Column Name	**Description**
workingDayConfigurationId	The globally unique identifier of the working day configuration. The working day configuration holds working days, the first day of the working week and non-working days.
projectId	The globally unique identifier of the project to which the working day configuration belongs.
dayKey	The working day represented in this row. Possible values are: • DAY_SUNDAY • DAY_MONDAY • DAY_TUESDAY • DAY_WEDNESDAY • DAY_THURSDAY • DAY_FRIDAY • DAY_SATURDAY
dayName	The name of the working day represented in this row.
deleted	Always FALSE because a working day configuration cannot be deleted.