



# ExportBuilder Basics

## AWARDS INSTRUCTION SHEET

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AWARDS ExportBuilders enable users to harness the power of our ReportBuilder functionality and take it a step further to meet a variety of outside reporting needs. Specifically, with ExportBuilders users can create customized data reports, and from those reports generate export files of a number of different types – CSV, TXT, XLS, or XML. Exported files can be saved to your computer, then uploaded into other data collection systems and/or worked with in other applications as needed. Additionally, as can be done with ReportBuilders, ExportBuilder formats can be saved and shared for future use.

**IMPORTANT!** *The ExportBuilder functionality was designed for use by individuals who are familiar with export files and formats, their design, and setup. It is not intended for use by all AWARDS users.*

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### REQUIRED PERMISSIONS

Permissions required to use an ExportBuilder in AWARDS are as follows:

- **Chart Access** – You must have chart access to the program(s) for which an export file is being generated.
- **Data Entry / Access** – Each ExportBuilder is located in a relevant AWARDS module. You must have permission to access a module in order to use any ExportBuilders it contains. For the specific data entry/access permissions that govern access to applicable modules, please refer to “Accessing Available ExportBuilders” on page 1.

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### ABOUT THIS DOCUMENT

This document is intended to provide a basic overview of each available ExportBuilder, as well as to guide you through use of those ExportBuilder features common to all. Specific topics covered are:

- **Accessing Available ExportBuilders** – Learn about each ExportBuilder, its location, uses, and more. Page **1**
- **Generating Export Files** – Learn to use ExportBuilders to create export files and save export formats. Page **7**
- **Frequently Asked Questions** – Learn the answers to common ExportBuilder questions. Page **14**

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## ACCESSING AVAILABLE EXPORTBUILDERS

AWARDS makes a variety of ExportBuilders available to users for the purposes of generating client-, service-, and employee-centric export files. Each of these ExportBuilders is located within a corresponding ReportBuilder. Upon accessing a ReportBuilder, users see a “Provide ExportBuilder Options” check box at the top of the initial ReportBuilder settings page. Checking off this option updates the page (and those that follow) to recognize that you will be using the ExportBuilder components for that feature rather than the basic ReportBuilder.

More information on the location and content of each available ExportBuilder is provided here:

- **Employment ExportBuilders** – Page **2**
- **Entitlements ExportBuilders** – Page **3**

- FormBuilder ExportBuilders – Page 3
- Incidents ExportBuilders – Page 4
- Medical and Hospital ExportBuilders – Page 6
- Program-Specific ExportBuilders – Page 5
- Services ExportBuilders – Page 6
- Human Resources ExportBuilders – Page 3
- Intake / Admission ExportBuilders – Page 4
- Profile / Demographics ExportBuilders – Page 6
- Reception Desk ExportBuilders – Page 6
- System Setup Info ExportBuilders – Page 7

For more information on using each of these ExportBuilders, including step-by-step instructions and configuration option details, see “Generating an Export File” on page 7.

Instructions on using the ReportBuilders that correspond to each of these ExportBuilders can be found in AWARDS Online Help and related instruction sheets. Detailed information on using the configuration settings common to ALL ReportBuilders is located in Online Help as well, and can also be found in the [ReportBuilder Basics](#) instruction sheet.

**IMPORTANT!** Please be aware that in addition to the types of information available in each ExportBuilder as detailed here, ExportBuilder data files may also include information entered in FormBuilder fields. In order for a FormBuilder field to be available as a variable when generating ExportBuilder files, that field must have been configured for inclusion on related ReportBuilders. Which ReportBuilder (and corresponding ExportBuilder) is “related” to a given form field is based on the form’s location. For example, if a form is available for inclusion when writing progress notes, the form’s fields (when set to do so) will be available for inclusion when using the Progress Notes ReportBuilder, and therefore when using the Progress Notes ExportBuilder. For more information on configuring form fields, please refer to AWARDS Online Help and/or the [FormBuilder Instruction Sheet](#).

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## EMPLOYMENT EXPORTBUILDERS

The AWARDS **Employment** module contains ExportBuilders that can be used to generate export files of basic client demographics information and detailed job interview, placement, and pay record data.

- **Education/Training Enrollments ExportBuilder** – Found in report mode of the Education/Training feature’s Enrollments component in the Employment module (within the Education/Training Enrollments ReportBuilder). Used to generate export files of basic client demographics as well as client training history information.

*The label of the Education/Training feature and its components is customizable. As a result, this ExportBuilder may be named differently than noted here.*

- **Education/Training Facilities ExportBuilder** – Found in report mode of the Education/Training feature’s Facilities component in the Employment module (within the Education/Training Facilities ReportBuilder). Used to generate export files of training facility information.

*The label of the Education/Training feature and its components is customizable. As a result, this ExportBuilder may be named differently than noted here.*

**Employers ExportBuilder** – Found in report mode of the Jobs feature’s Employers component in the Employment module (within the Employers ReportBuilder). Used to generate export files of employer information, including contact details, hiring information, available positions, and more.

- **Job Interviews ExportBuilder** – Found in report mode of the Jobs feature’s Job Interviews component in the Employment module (within the Job Interviews ReportBuilder). Used to generate export files of basic client demographics as well as client job interview data.

- **Job Placements ExportBuilder** – Found in report mode of the Jobs feature's Job Placements component in the Employment module (within the Job Placements ReportBuilder). Used to generate export files of basic client demographics as well as client job placement and employment verification data.
- **Pay Records ExportBuilder** – Found in report mode of the Jobs feature's Job Placements component in the Employment module (within the Pay Records ReportBuilder). Used to generate export files of basic client demographics, client job placement and employment verification data, and pay rate information over time.

*In order to use any of the Employment module ExportBuilders, you must have chart access permission to the program(s) for which an export file is being generated. You must also have the "Display Any Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Employment Button" permission.*

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## ENTITLEMENTS EXPORTBUILDERS

The AWARDS **Entitlements** module contains an ExportBuilder that can be used to generate export files of basic demographics and detailed entitlements information.

- **Entitlements ExportBuilder** – Found within the Entitlements ReportBuilder in the Entitlements module's Certified Entitlements feature. Used to generate export files of client demographic data, as well as certified entitlement record details.

*In order to use the Entitlements module ExportBuilder, you must have chart access permission to the program(s) for which an export file is being generated. You must also have the "Display Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Entitlements Button" permission. Additionally, unless you are in the "Entitlements Staff" or "Executive" user groups, you must have the "Entitlements Data Entry" permission.*

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## FORMBUILDER EXPORTBUILDERS

The ExportBuilder option within the **FormBuilder ReportBuilder** feature enables users to create ad hoc export files from any form built using the FormBuilder and, when applicable, to see a historical overview of form values.

*During the process of adding fields to a form, you may have chosen to make one or more fields available when using related ReportBuilders. If so, you can also generate export files of form data using the ExportBuilder option within those ReportBuilders. When doing so, keep in mind that if more than one value exists for a form during the report date range used, only the latest value is included in the related ExportBuilder's export file contents. To see all values entered in the form over a specified period of time, use the ExportBuilder within the FormBuilder ReportBuilder instead.*

For *client* forms, the FormBuilder ExportBuilder tool can be accessed from within the Outcomes module FormBuilder feature, or directly from the Outcomes module menu (both using the FormBuilder ReportBuilder tool). (The first of these two report access points is limited to use by staff with FormBuilder access, while the second is designed for use by anyone with Outcomes module access.) For *employee* forms, this tool can be accessed from within the ReportBuilders component of the Human Resources module, or from within the Outcomes module FormBuilder feature (using the FormBuilder ReportBuilder).

*The permissions required to use the FormBuilder ExportBuilder vary based on the location from which it is accessed. For more information on the specifics for the module and feature within which you are accessing this ExportBuilder, please refer to the relevant portion of Online Help.*

## HUMAN RESOURCES EXPORTBUILDERS

The AWARDS **Human Resources** module contains an ExportBuilder that is employee-centric rather than client-centric.

- **Employees ExportBuilder** – Found within the Employees ReportBuilder in the Human Resources module. Used to generate export files of employee demographics and additional data from within Staff Information records.
- **FormBuilder ExportBuilder** – Found under ReportBuilders > FormBuilder ReportBuilder in the Human Resources module. Used to generate export files on employee demographics and data from any employee form located in the HR module including, when applicable, a historical overview of form values. (Also accessible from within the Outcomes module FormBuilder ReportBuilder feature.)

*In order to use the Human Resources module ExportBuilder, you must have the “Display Executive Administration Buttons” data entry/access permission, and one of the three human resources permissions – “HR Data Full Access,” “HR Data Read Only,” or “HR Data Work Supervisees.”*

## INCIDENTS EXPORTBUILDERS

The AWARDS **Incidents** module contains an ExportBuilder that can be used to generate export files of basic demographics and detailed incidents information.

- **Incidents ExportBuilder** – Found within the Incidents ReportBuilder in the Incidents module. Used to generate export files of demographic data for incident participants, as well as initial incident report and incident review details.

*In order to use the Incidents module ExportBuilder, you must have chart access permission to the program(s) for which an export file is being generated. You must also have the “Display Chart Records Buttons” data entry/access permission, along with the “Display Chart Records Incidents Button” permission. In addition, if you are a member of the incident review committee and must have access to full incident details, including those entered during the incident review process, you must have the “Incident Review Data Entry” permission.*

## INTAKE / ADMISSION EXPORTBUILDERS

The AWARDS **Intake/Admission** module contains an ExportBuilder that can be used to generate export files of basic demographics and detailed intake/admission records information.

- **Intake/Admission ExportBuilder** – Found within the Intake/Admission ReportBuilder in the Intake/Admission module. Used to generate export files of demographic data for clients with program referral records, as well as detailed referral information from those records.

*In order to use the Intake/Admission module ExportBuilder, you must have chart access permission to the program(s) for which an export file is being generated. You must also have the “Display Chart Records Buttons” data entry/access permission, along with the “Display Chart Records Intake/Admission Button” permission.*

## MEDICAL AND HOSPITAL EXPORTBUILDERS

The AWARDS **Medical** and **Hospital** modules contain ExportBuilders that can be used to generate export files of basic client demographics as well as allergy, immunization, provider, hospitalization, or medications data.

- **Allergies ExportBuilder** – Found in the optional Allergies feature in report mode in the Medical module (within the Allergies ReportBuilder). Used to generate export files of basic client demographics as well as client allergy information.
- **Hospitalization Episodes ExportBuilder** – Found in the Hospital module's Episodes feature in report mode (within the Hospitalization Episodes ReportBuilder). Used to generate export files of basic client demographics as well as hospitalization episodes information.
- **Immunizations ExportBuilder** – Found in the optional Immunizations feature in report mode in the Medical module (within the Immunizations ReportBuilder). Used to generate export files of basic client demographics as well as client immunization records.
- **Medications ExportBuilder** – Found in the Medications feature in report mode in the Medical module (within the Medications ReportBuilder). Used to generate export files of basic client demographics as well as client medication and/or prescription information.
- **Providers ExportBuilder** – Found in the Providers feature in report mode in the Medical module (within the Providers ReportBuilder). Used to generate export files of basic client demographics as well as support service providers information.
- **Vital Signs ExportBuilder** – Found in the Medical module's Vital Signs feature in report mode (within the Vital Signs ReportBuilder). Used to generate export files of basic client demographics as well as vital signs information.

*In order to use any of the Medical module ExportBuilders, you must have chart access permission to the program(s) for which an export file is being generated. You must also have the "Display Any Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Medical Button" permission.*

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## PROFILE / DEMOGRAPHICS EXPORTBUILDERS

The AWARDS **Profile** module contains ExportBuilders that can be used to generate detailed export files of client and household demographics information.

- **Demographics ExportBuilder** – Found under ReportBuilders > Demographics ReportBuilder in the Profile module. Used to generate export files of client demographics information entered at intake/admission and discharge, as well as demographics data recorded on face sheets.
- **HMIS ExportBuilder** – Found under ReportBuilders > HMIS ReportBuilder in the Profile module. (Only available when at least one program is set up in AWARDS to submit the HUD APR.) Used to generate export files of client and household member demographics information, as well as all required data collected for the HUD APR.
- **Household ExportBuilder** – Found under ReportBuilders > Household ReportBuilder in the Profile module. Used to generate client and household member demographics data.

*In order to use any of the Profile module ExportBuilders, you must have chart access permission to the program(s) for which an export file is being generated. You must also have the "Display Any Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Profile Button" permission.*

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## PROGRAM-SPECIFIC EXPORTBUILDERS

Some AWARDS ExportBuilders are available only to the specific program types to which they are relevant.

- **OASAS ExportBuilder** – Found under OASAS Reports > OASAS ReportBuilder in the Fiscal/Program module. (May also be accessible from within the Discharge module in some AWARDS databases.) Used to generate export files of basic demographics information for OASAS program clients, as well as OASAS data collected for clients at admission (PAS 44) and discharge (PAS 45).

*In order to use this ExportBuilder, you must have chart access permission to the program(s) for which an export file is being generated. To access it from its default location within the Fiscal/Program module, you must also have the "Display Executive Administration Buttons" and "Display Fiscal Buttons" permissions (unless you are a member of the "Fiscal Staff" or "Executive Officer" user groups, which have access to the necessary module automatically).*

- **Outreach ExportBuilder** – Found within the Outreach ReportBuilder in the Intake/Admission module in report mode. (Available only for programs designated as Outreach behind-the-scenes in AWARDS.) Used to generate export files of basic demographics for Outreach program clients as well as data on client outreach encounters.

*In order to use this ExportBuilder, you must have chart access permission to the program(s) for which an export file is being generated. You must also have the "Display Any Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Intake/Admission Button" permission.*

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## RECEPTION DESK EXPORTBUILDERS

The AWARDS **Reception Desk** module contains an ExportBuilder that can be used to generate export files of basic client demographics and detailed reception desk data.

- **Reception Desk ExportBuilder** – Found in the Reception Desk module's Program Attendance feature in report mode (within the Program Attendance ReportBuilder). Used to generate export files of client demographic data, as well as program attendance record details.

*In order to use the Reception Desk module ExportBuilder, you must have chart access permission to the program(s) for which an export file is being generated. You must also have the "Display Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Reception Desk Button" permission.*

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## SERVICES EXPORTBUILDERS

Several ExportBuilders, located in the AWARDS **Services** module, are used to generate export files of basic client demographics information as well as client services data.

- **Contacts Log / Supportive Services Checklist ExportBuilder** – Found in the Services module's Contacts Log feature in report mode (within the Contacts Log / Supportive Services Checklist ReportBuilder). Used to generate export files of basic client demographics as well as client services data recorded using either the basic contacts log or the optional supportive services checklist.
- **Group Activities ExportBuilder** – Found in the Services module's Activities feature in report mode (within the Group Activities ReportBuilder). Used to generate export files of basic client demographics as well as client services data recorded using group activity attendance records and, when applicable, associated group notes.
- **Group Member Status ExportBuilder** – Found in the Services module's Group Schedule Setup > Group Member Status feature in report mode (within the Group Member Status ReportBuilder). Used to generate export files of basic client demographics, as well as member information for scheduled group activities.

- **Group Notes ExportBuilder** – Found in the Services module's Group Notes feature in report mode (within the Group Notes ReportBuilder). Used to generate export files of basic client demographics as well as client services data recorded using group notes.
- **Group Schedules ExportBuilder** – Found in the Services module's Group Schedule Setup > Group Schedules feature in report mode (within the Group Schedules ReportBuilder). Used to generate export files of group activity schedules information.
- **Progress Notes ExportBuilder** – Found in the Services module's Progress Notes feature in report mode (within the Progress Notes ReportBuilder). Used to generate export files of basic client demographics as well as client services data recorded in progress notes.
- **Service Contacts ExportBuilder** – Found within the Services Contacts ReportBuilder in the Services module. Used to generate export files of basic client demographics as well as client services data recorded using group notes, group activity attendance, progress notes, and the contacts log (basic or supportive services checklist versions).

*In order to use any of the Services module ExportBuilders, you must have chart access permission to the program(s) for which an export file is being generated. You must also have the "Display Any Chart Records Buttons" data entry/access permission, along with the "Display Chart Records Services Button" permission.*

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## SYSTEM SETUP INFORMATION EXPORTBUILDERS

The AWARDS **System Setup** module contains an ExportBuilder that can be used to generate export files detailing program setup information.

- **Agency Programs ExportBuilder** – Found within the Agency Programs ReportBuilder in the System Setup module's Agency Program Information feature. Used to generate export files detailing individual program setup characteristics.

*In order to use the Agency Programs ExportBuilder, you must have the "Display Executive Administration Buttons" data entry/access permission AND either: a) be a member of the "Human Resources" or "Executive Officer" user groups, or b) have one of the "Permissions Data Entry" exception override permissions. In addition, unless you are in the "Executive Officer" or "System Administrator" user groups, you must have the "Agency Program Information" exception override in order to access and export program information.*

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## GENERATING EXPORT FILES

When working with an ExportBuilder, users have the ability to generate export file formats from scratch, which can then be saved for later use as needed. Alternately, export files can be generated from previously saved export formats, as well as from report formats saved when using the corresponding ReportBuilder. To generate an export file using any of these methods – each of which is described in detail here – complete the following steps:

*The basic process of generating an export file is the same across all ExportBuilders; however, some steps may vary slightly based on the type of data being worked with and the ReportBuilder through which the ExportBuilder has been accessed. Such variations are noted within the instructions that follow.*

1. Open the ReportBuilder corresponding to the ExportBuilder you would like to use.

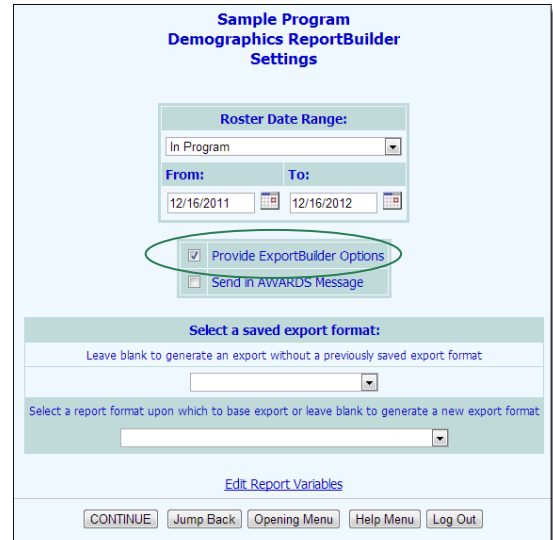
*The steps that follow use the Demographics ExportBuilder, accessed from within Profile > ReportBuilder > Demographics ReportBuilder, as an example.*

- On the initial *Report Settings* page that is displayed, use the **Date Range** option(s) on this page to limit the export file's contents by data date and/or client roster dates. Be aware that the date range(s) specified here are not included in saved export formats and must be set for each export file generated.

**IMPORTANT!** *The specific options you see are based on the ReportBuilder through which you have accessed this ExportBuilder; both utilize the same date range settings. As a result, it may be useful to review the instructions for the relevant ReportBuilder in Online Help if you have questions about the date range setting(s) available here.*

- Click the **Provide ExportBuilder Options** check box. 

The page is updated to reflect your choice, changing to *Export Settings*, and displaying relevant export format selection options at the bottom of the page.



- If you would like the export file (along with a copy of the error log, when applicable) to be sent to your AWARDS Messages module upon its completion, click the **Send in AWARDS Message** check box. When this option is selected, you will be able to continue working in AWARDS rather than waiting for the export file to generate. You will also be able to retain the export file in your messages for reference at a later time without having to re-generate the export.
- Use the export format drop-down options at the bottom of the page to specify whether you will be generating the export file from scratch or using a previously saved format. Available choices are to:

- **Use a previously saved export format** – To generate the export file using a format previously created and saved using this ExportBuilder, select the format from the first drop-down. (The page is updated to remove the second drop-down, which is not applicable in this case.) When using this method, you can immediately generate the export file without altering any settings. Alternately, you can first review and modify the settings of the format by checking off the available **Provide option to modify settings of saved export format** check box.
- **Use a previously saved ReportBuilder report format** – To generate the export file based on a report format previously created and saved using the corresponding ReportBuilder, leave the first drop-down blank, and select the report format from the second drop-down. When using this method, data variable selections and content/order settings in the steps that follow will default from those used in the selected report, and can be adjusted as needed. Export file format and field mapping settings must be manually set.

*Any changes made to the default settings of a report format in the steps that follow are only applicable to the export file being generated. To make changes to the report format itself that are then saved with that format, you must do so through the corresponding ReportBuilder.*

- **Start from scratch, without using a previously saved export or report format** – To create your own export format for single-time use or for saving and later re-use, leave both drop-down options blank. When using this method, the steps that follow will include selection of data variables, and the setting of options for data content/order, file formatting, and field mapping.



6. Click **CONTINUE**.

If you are using an existing export format and have NOT chosen to view/modify the settings of that format, you are now taken directly to the export file page. Continue with step 20.

In all other instances, the *Options* page is displayed. →

Continue with step 7.



7. Configure the options on this page as follows, or make changes to existing selections as needed:

*When working with an existing report or export format the settings on this page default to those previously saved with that format.*

- **Unduplicated Client Count** – By default some export files will include all clients who were enrolled in the selected program(s) at some point during the date range specified in step 2. That may result in duplicate records in instances where a client has multiple histories in a single program, or a history in multiple programs.

When applicable to the current ExportBuilder, you will see an **Unduplicated Client Count** check box at the top of the page. Check off that option if you would like to filter out any duplicates, list each client only once in the export file, and limit file contents to the most recent data for each included client.

*This option is not available/relevant for all ExportBuilders, based on the type of data being worked with. If you do not see this check box, please disregard and continue on to choosing the fields to display.*

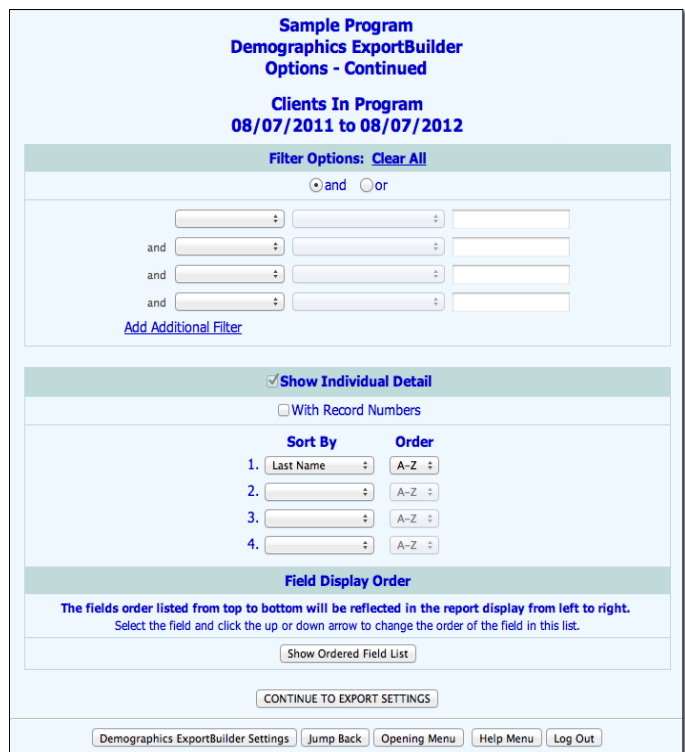
- **Choose fields to display** – The *Options* page contains a list of data variables related to the ExportBuilder you are working with, representing data collected in various AWARDS locations. Click the check box next to each variable to be included in the export file, and/or use the available **Check All** option(s) as needed.

*The specific data variables you see are based on the ReportBuilder through which you have accessed this ExportBuilder; both utilize the same options on this page. As a result, it may be useful to review the instructions for the relevant ReportBuilder if you have questions about the data variable selections.*

8. Click **CONTINUE**. The *Options – Continued* page is displayed. →

9. Configure the options on this page as follows to adjust the scope and order of export file contents:

*When working with an existing report or export*



format the settings on this page default to those previously saved with that format.

- **Filter Options** – Filters apply user-specified criteria to the export file variables chosen on the previous page, thereby limiting included records. To set a filter, click the drop-down arrow on the left in the first filter options row and select the variable to be used for filtering. Click the corresponding middle drop-down arrow and select the type of filter to be used. Lastly, in the corresponding field to the right of the filter selection, type the filter criteria. For example, these three columns could be set as “Gender,” “Equals,” and “Males” to limit file contents to only those records for male clients.

Repeat as needed for a total of up to eight filters (after adding four filters, click the **Add Additional Filter** link to add others). If you have added multiple filters, be sure to click the **and** or **or** radio button to specify how those filters should be combined. The default is “and.”

*It is not possible to combine “and” and “or” filters. As a result, the filter combination selection made here applies to all filters set for the export.*

- **With Record Numbers** – If the rows of data in the export file should be numbered, click this check box.
- **Sort By / Order** – To sort the export file by one or more of the included data variables, click the **Sort By** drop-down arrow(s) and select the variable(s). Click the corresponding **Order** drop-down arrow for each sorting selection to indicate whether the sort is to be ascending (“A-Z”) or descending (“Z-A”).
- **Field Display Order** – To adjust the order of the data columns in the export file, click a variable in the “Field Display Order” portion of the page to highlight it. Use the up and down arrow icons to the right of the variables list to move the highlighted variable up or down in the list, or drag and drop the variable to the desired position. Repeat as needed. The field display order listed from top to bottom here will be reflected in the export file columns display from left to right.

*If more than eight data variables were selected on the previous page, the variables list is not automatically displayed. You must first click **Show Ordered Field List** before setting the order.*

To hide a field from the export contents entirely, move it beneath the available “Hidden Fields” row. By doing so you can still filter your export contents on that variable, but keep its individual detail from being a part of the export if it is not necessary to include it.

10. Click **CONTINUE TO EXPORT SETTINGS**. A second *Options - Continued* page is displayed. →

*When working with an existing export format, the settings on this page default to those saved with that format.*

11. Click the **Export Type** drop-down arrow and select the type of export file you are generating:

CSV	TXT	XLS	XML
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The page is updated based on your selection.

12. Only export and data options applicable to the format you've chosen are displayed on the page, and may include a combination of the following:

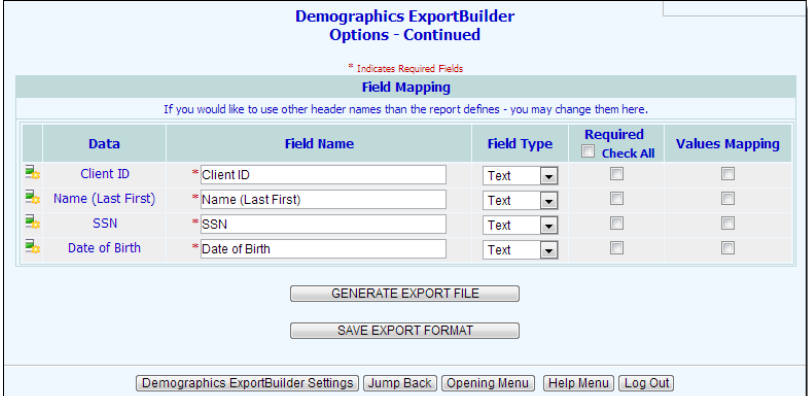
- Header Row
- Fixed Width / Delimited By
- Fields Qualified by
- Text Padding
- Numeric Padding
- Root Node
- Container Note
- List Delimiter
- Boolean Values
- Date Format / Separator
- Value Mapping for non-specified values

Configure the applicable options as needed.

13. Click **CONTINUE TO EXPORT SETTINGS**. The final *Options - Continued* page is displayed. 

*When working with an existing export format, the settings on this page default to those saved with that format.*

*Data fields listed from top to bottom on this page represent export file fields/columns as they will be included from left to right.*



Data	Field Name	Field Type	Required Check All	Values Mapping
Client ID	Client ID	Text	<input type="checkbox"/>	<input type="checkbox"/>
Name (Last First)	Name (Last First)	Text	<input type="checkbox"/>	<input type="checkbox"/>
SSN	SSN	Text	<input type="checkbox"/>	<input type="checkbox"/>
Date of Birth	Date of Birth	Text	<input type="checkbox"/>	<input type="checkbox"/>

14. To add placeholder fields to the export file for the purposes of inserting a sub-export or accommodating export fields that are not available in AWARDS, or to remove a previously added placeholder field, use the icons to the left of the data column:

*"Sub-exports" allow for the embedding of saved export formats from other ExportBuilders. Those export formats link data for each client from the corresponding ExportBuilders to the Demographics ExportBuilder*

-  **Add New Field** – Click this icon to add a new field to the export file to the left of the one in which the icon is clicked. Enter a name for the field in the corresponding **Data** column.

*If you are working in the Demographics ExportBuilder and the new field is to contain a sub-export from another AWARDS module, be sure to select "Export Format" as the field type in step 15. You will then be able to select the sub-export's module and format name from the Data column rather than typing something in.*

-  **Delete Field** – Click this icon to remove a placeholder field.

15. For each of the “Data” (and placeholder) fields displayed, configure the fields and options on this page as follows:

- **Field Name** – To use a field name other than the one specified on this page, overwrite the existing field name. This change applies to the export file only, and is not reflected elsewhere in AWARDS.
- **Field Width (Start – Finish)** – In this field, type the column width this field should occupy in the export file. The start and finish positions are automatically determined based on the specified width for this field and any previous fields.

*This option is only available for the TXT export type, when “Fixed Width” was selected on the previous page.*

- **Field Type** – Click this drop-down arrow and change the field type if needed. Available options are “Text,” “Numeric,” “Date,” “Yes/No,” “List,” and (in some cases) “Export Format.”

*The field type specified here is used in conjunction with the padding options specified on the previous page, to ensure that the export file data is formatted appropriately.*

*“Export Format” is only available when working in the Demographics ExportBuilder if the system finds a saved export format of the same export type in one of the following locations:*

<i>Hospital &gt; Episodes</i>	<i>Medical &gt; Allergies</i>	<i>Medical &gt; Medications</i>
<i>Employment &gt; Job Placements</i>	<i>Employment &gt; Job Interviews</i>	

*If “Export Format” is selected here, the Data column for this variable will include two drop-down options. Use those options to select the module and export format to be used as a sub-export. When the export file is generated, data from the sub-export will be included.*

- **Tag or Property** – Click this drop-down arrow and make a selection to indicate whether the export variable is a “Tag,” “Sub-Tag,” or “Property.” The default value is “Tag.”

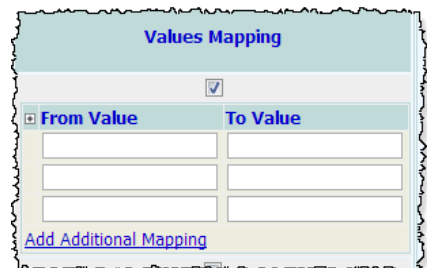
*This option is only available for the XML export type.*

*A property applies to the closest tag or sub-tag that precedes it, or to the container node when working with the variable at the top of the list. (An exception is made if the first variable is a sub-export, in which case the sub-export, as well as the very next field, will be treated as a tag, regardless of what is selected from this drop-down.)*

*A sub-tag will be indented under the closest tag that precedes it. The tag will be closed before the next field identified as a tag, or at the end of the file if there are no more tags that follow.*

- **Required** – If data is to be required in this field, click the corresponding check box (or use the **Check All** option at the top of the page to require all fields in the file). If any required fields do not have values in them when the export file is generated, those fields will be flagged in an error file.

- **Values Mapping** – If any field values should be mapped to a different value during the export process, click the corresponding check box. Three sets of **From Value** and **To Value** fields are displayed. Any entry in the From Value field will appear as its corresponding To Value entry. At least one From/To pair must be entered if the Values Mapping option is selected. If more From/To sets are needed, click the **Add Additional Mapping** link. The **Value Mapping** field on the second *Options* page, displaying “Values not specified should remain as is:” and a check box is related to this functionality. If this is left



unchecked, any values not listed will appear blank in the export file and on the screen display. If it is checked, they will remain as they appear in the ReportBuilder.

16. To save the settings made on this and the previous pages so that this export file can easily be re-generated in the future, click **SAVE EXPORT FORMAT**. The *Save Export Format* dialog box is displayed.

*If it is not necessary to save the export format and you only want to generate the export file, skip to step 20. Please keep in mind before doing so that if you choose to generate the export file without first saving, you may lose new fields added to the export if you later jump back to save the format. If you need to retain the full export format, always save during step 16.*

17. In the **Export Format Title** field, type the name of the format.

*When working with a previously saved format, please keep in mind that only the user who originally saved a format and individuals who can save formats for all users can modify that format. Others can save modified formats under a new name, but cannot apply the modifications to the original format.*

*We recommend that the title used be indicative of the export contents so that it is easily identifiable when selecting the format for the purposes of generating the export file in the future.*

18. Click one of the available **Save Export Format for** radio buttons to determine whom the export format should be accessible to. Available options are:

- **Yourself** – When selected, only the user saving the export format has the ability to use or modify that format.
- **All Staff** – When selected, all staff in the selected program(s) have the ability to use the export format; however, only you and other individuals with the ability to save export formats for all staff will be able to modify or delete that format.

*In a single-agency AWARDS database, only members of the "System Administrator" and "Executive Officer" user groups have the ability to save export formats to be used by others. In a multi-agency/HMIS AWARDS database, the option to save export formats for other users is available to the "System Administrator," "CoC Executive Officer," "CoC Executive Support Staff," and "Agency Executive Officer" user groups. People who are not members of the specified user groups can only save export formats for themselves.*

19. Click **Save Export Format**. The export format is saved and the *Options – Continued* page is re-displayed.

20. Click **GENERATE EXPORT FILE**. The export file is generated and the *ExportBuilder* page is displayed.

*If you chose the "Send in AWARDS Message" option on the initial export option settings page, a notice will be displayed upon clicking GENERATE EXPORT FILE to let you know that the export file will be sent to your Messages module upon completion. You can then navigate away from the page, or wait for the export to complete and then proceed with step 21.*

21. At this time you can:

- **Review the export contents** – A report version of the export file contents is displayed on the *ExportBuilder* page. The data in that report can be sorted and worked with on the page as needed, though keep in mind any changes made here are not applied to the export file itself.
- **View the error log** – If any errors were found when the export file was generated, and have been included in the export file, an error log link is available. Use that log to review the errors (for example, a required field that does not contain data) and go back into the relevant records in AWARDS to make corrections as needed. Once corrections have been made the export file must be re-generated.

*Error log files are in .TXT format and can be viewed and worked with from within any text reader; for example, Notepad.*

- **Download the export file** – To do so click the **Download File** link and follow the prompts on the subsequent dialog boxes to save that file to your computer.

The process of generating an export file is now complete.

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## FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding ExportBuilders can be a useful reference when you have your own questions about the functionality. You may also find it helpful to reference the frequently asked questions in our [ReportBuilder Basics](#) instruction sheet.

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### CAN EXPORTBUILDER FORMATS BE SAVED FOR SPECIFIC PROGRAMS?

No, export formats are designed to be saved for all programs.

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### CAN MULTIPLE EXPORTBUILDER FILES BE COMBINED?

When working with the Demographics ExportBuilder (accessible from the Profile module), a sub-export can be included from one or more of the following modules if at least one export format of the same type has been saved there:

- **Hospital > Episodes**
- **Medical > Allergies**
- **Medical > Medications**
- **Employment > Jobs > Job Placements**
- **Employment > Jobs > Job Interviews**

To add a sub-export to your Demographics export file, use the Add New Field icon available on the *Options – Continued* page where field mapping takes place. From the field type selection list for that new field, select **Export Format**, and then in the "Data" column for that field select the relevant module and export format from the two available drop-down options.

*The Export File option is only available in the Field Type column if the system recognizes that there is a saved export format in one of the locations listed above, and that the export format is the same type as the one you are currently working with.*

The report version of the export file that is displayed when GENERATE EXPORT FILE is clicked will include a placeholder column for the sub-export data. The actual sub-export data will be included in the export file itself.

*At present, the combining of ExportBuilder files is limited to the specific case described here. To combine other exports you can generate multiple ExportBuilder files and then piece them together outside of AWARDS, as needed.*

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### HOW DO I DELETE A SAVED EXPORT FORMAT?

A saved export format can be deleted if it is one you originally created. If you have the ability to save export formats for other users, you also have the option to delete the format even if it is one you did not personally create. To do so in either instance, complete the following steps:

1. Open the ReportBuilder corresponding to the ExportBuilder in which the format was originally saved.
2. On the initial *Report Settings* page, click the **Provide ExportBuilder Options** check box.
3. From the first export format drop-down option at the bottom of the page, select the format to be deleted.
4. Click the **Provide option to modify setting of saved export format** check box.
5. Click **CONTINUE**.
6. Click **CONTINUE**.
7. Click **CONTINUE TO EXPORT SETTINGS**.
8. Click **CONTINUE TO EXPORT SETTINGS**.
9. Click **DELETE EXPORT FORMAT** at the bottom of the page.
10. Complete the deletion process by clicking **OK** on the confirmation dialog box that is subsequently displayed.

## WHICH EXPORT/DATA OPTIONS APPLY TO WHICH EXPORT TYPES?

On the page on which your export type is chosen, the export and data options are updated based on that selection so that only those that are applicable are displayed. The combination of available options for each export type is as follows:

FIELD / OPTION	CSV	TXT	XLS	XML
Header Row	X	X	X	
Fixed Width / Delimited By	x*	X		
Fields Qualified By	X	X	X	
Text Padding	X	X	X	
Numeric Padding	X	X	X	
Root Node				X
Container Node				X
Boolean Values	X	X	X	X
Date Format / Separator	X	X	X	X
List Delimiter	X	X	X	X
Value Mapping	X	X	X	X

\* When working with CSV files, "Delimited By" is selected automatically.

## WHO CAN SAVE EXPORTBUILDER FORMATS FOR OTHER USERS?

In a single-agency AWARDS database, members of the "System Administrator" and "Executive Officer" user groups have the ability to save export formats to be used by other agency users. In a multi-agency/HMIS AWARDS database, the option to save export formats for other users is available to the "System Administrator," "CoC Executive Officer," "CoC Executive Support Staff," and "Agency Executive Officer" user groups. People who are not members of the specified user groups can only save export formats for themselves.

## WHY IS A CHANGE I MADE TO A CLIENT'S RECORD NOT IMMEDIATELY REFLECTED IN AN EXPORTBUILDER FILE?

There are two possible causes when ExportBuilder files are not immediately displaying information updated in the same database login session. First, it may be indicative of a memory cache issue. To get around this, press **<CTRL+R>** while viewing the report page on which the export file link is displayed, or click your browser's refresh icon. If the report content changes, re-generate the export file.

Second, when using some ExportBuilders (such as the HMIS or Demographics ExportBuilders) if the data file's results include fewer than 5,000 records, the data comes from the live database and should reflect what's currently in records. If the data file's results include more than 5,000 records though, the data comes from the previous night's database backup, and it is only exported to the data file rather than displayed on the screen. As a result, any changes made to records between the time of the backup and when the file was generated will not be reflected in the data.