

Xactimate Export for Donan Project Reporting Tool

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Overview

This document provides instructions for exporting a project from Xactimate in a format that can be uploaded into the Donan Project Reporting Tool. This allows our clients to submit one or more projects to Donan without the need to re-key information into web forms.

Summary of the Procedure

- Download the Excel Xactimate Export spreadsheet from the Project Reporting Tool.
- Export an Xactimate project into Excel.
- Save the Excel spreadsheet as a tab-delimited text file.
- Upload the text file into the Project Reporting Tool.

Details of the Procedure

Download the Xactimate Export spreadsheet

1. Go to the Project Reporting Tool (<http://donan.interactivemedialab.com>) in your web browser.
2. Select *Submit a Project* from the menu.
3. At the “Project Information” page, click the “Upload from Xactimate” link.
4. At the “Upload Xactimate Data” page, click the “Download Excel Export Worksheet” link.

Export an Xactimate project into Excel

1. In the Xactimate Control Center, select *Modules > Xactimate Excel Template Editor* from the menu. This should launch Excel and also open an “Xactimate Tokens” dialog.
2. In Excel, select *File > Open* from the menu. Browse to and open the Xactimate Export spreadsheet you downloaded from the Project Reporting Tool.
3. In the “Xactimate Tokens” dialog, select the estimate you wish to export and click the “View Report” button. This should open a new Excel window showing selected data from the Xactimate project.

Save the Excel spreadsheet as a tab-delimited text file

1. In Excel, select *File > Save As* from the menu.
2. In the “Save As” dialog, click the “Save as type” dropdown list and select “Text (Tab delimited)”.
3. Change the file name and folder if desired, then click the “Save” button.

Upload the text file into the Project Reporting Tool

1. In your web browser, return to the “Upload Xactimate Data” page if you’ve left it.
2. Click the “Browse” button and select the tab-delimited file you just saved.
3. Click the “Upload and Import” button. After a few moments, you should see a confirmation that the file was processed.