ClickTime Customizable Data Export Linking

Direct data linking from ClickTime to your system

ClickTime

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Introduction

The right feature for you?

If your company already uses an internal reporting system based mainly on XLS, CSV, Text or XML data retrieved from ClickTime, the Customizable Data Export (referred to as CDE) linking may be perfect for you.

There are multiple steps involved in setting up the export and linking for the first time, but this becomes a simple one-step update action once all the settings are configured properly. It is recommended that the administrator/manager in charge of setup have some experience with the linked application.

How it works

Data Integration allows your company to easily update your in-house spreadsheet or database with fresh data from your ClickTime account. This functionality will provide the ability to request a saved Customizable Data Export report via a single HTTPS request without logging into ClickTime using the standard web application login interface.

The URL for this request, which is generated through the ClickTime application user interface, is made up of three basic parts. There are a number of advanced features associated with the initial generation of this export URL using on-screen options, plus some optional parameters that may be added to URL after generation.

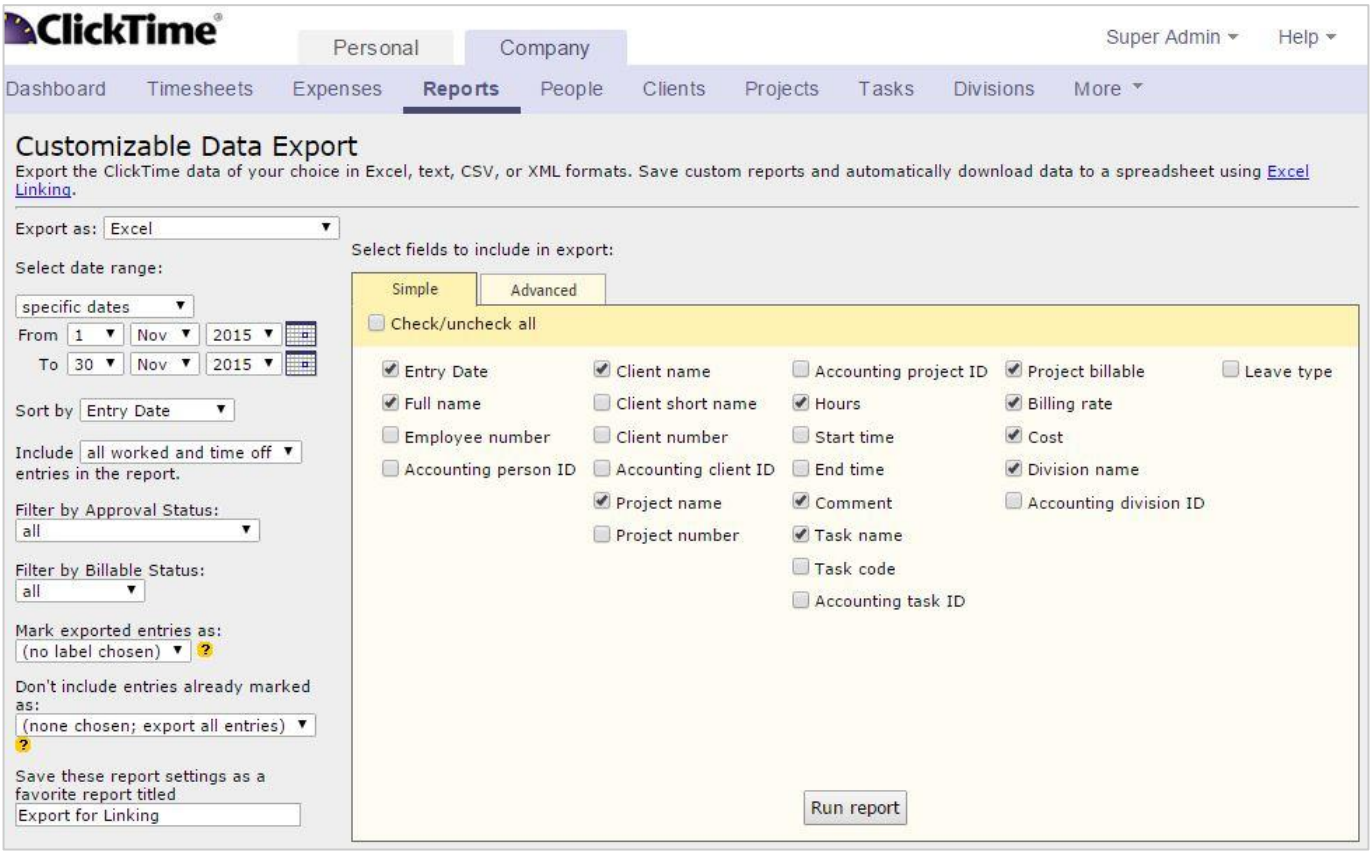
Requirements

The following requirements and restrictions apply to accounts wishing to use the Customizable Data Export feature:

- Data Linking is a feature of ClickTime Corporate and Enterprise accounts. If you would like to find out more about how to add this functionality to your account, please contact ClickTime's Professional Services team.
- Only Administrators and Managers with permissions to access Reports in your ClickTime account can configure and save a Custom Export.
- The Customizable Data Export allows access to time entry data. It does not support integration of expense information.
- A secure connection (SSL/https) is required to use this feature. To find out more about setting up your account for secure connections, please read the Security Settings help topic.
- Only one "link" to ClickTime can be established per workbook.

Customizable Data Export

Here's how you get started!



- To create a Customizable Data Export for data linking, go to *Company* → *Reports* → *Customizable Data Export* (the report is also available in the *Miscellaneous* section of the Reports page).

- Any field available through the Customizable Data Export selector interface can be exported and used in your external database.

- Any field that is currently not available through the Customizable Data Export likely does not currently exist in the ClickTime system. If you need additional data fields, you will want to create custom fields as needed. Any custom fields that are created will automatically be added to the Customizable Data Export selector interface.

- Select the fields you need to further manipulate in your external databases and save the report settings as a favorite report by specifying a title and running the report. Then hit **Run report**.

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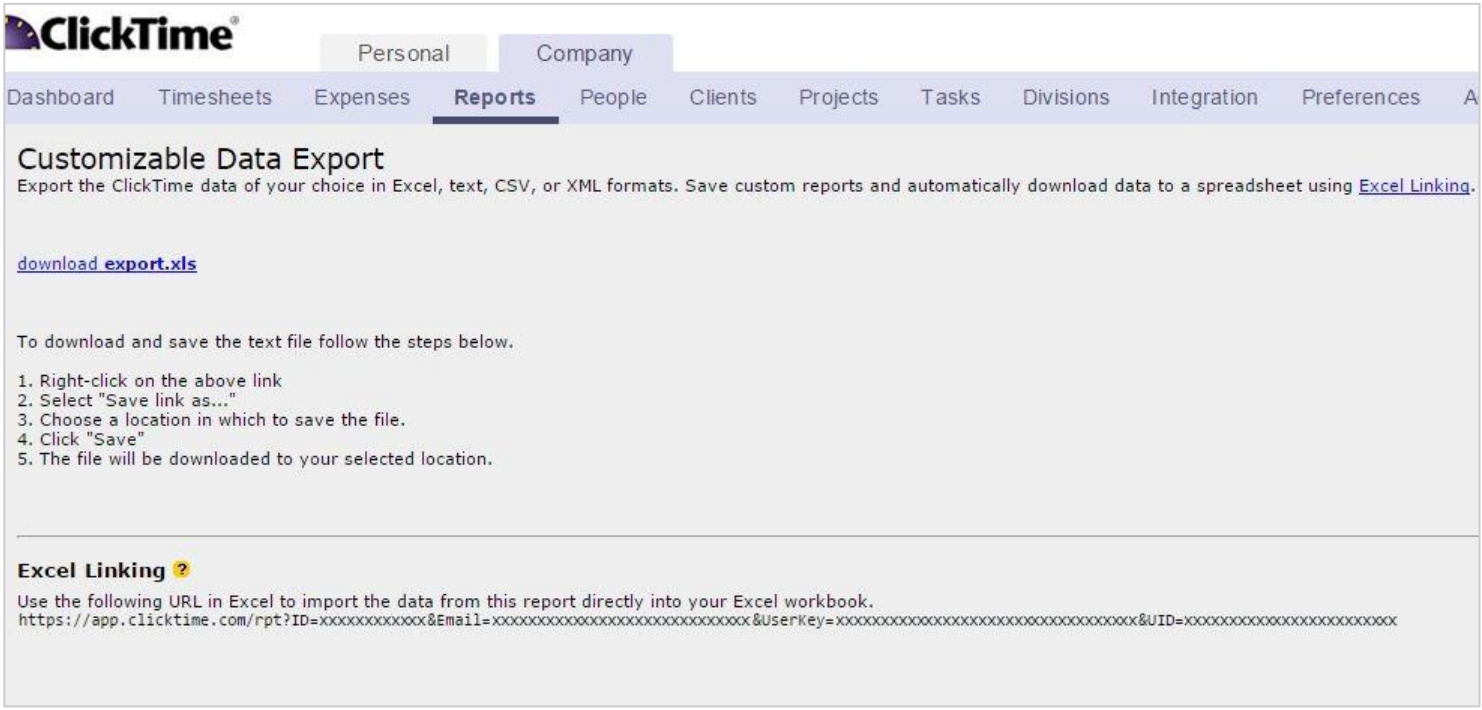


- Once you have run your report with these settings, you should see a URL link like the one shown in the following screenshot, under the heading "Excel Linking", which you should copy. You may also retrieve this URL by returning to Company Reports, clicking on your saved report and scrolling to the bottom of the report selector screen. You will use this URL to link your external application to your ClickTime account.

- For the purpose of data linking, the exported entries in the saved Customizable Data Export should not be marked with a label. Any labels will be ignored when data is retrieved by your external spreadsheet/database. However, time entries previously marked with a label via another report in your ClickTime account can be excluded from this report by using the selector "Don't include entries already marked as...".

- By default, data will only be exported for the date range you specify in the report options. However, you can override this date range later via the custom URL configuration parameters detailed in the next section.

- Please note: We recommend using XML for optimal data manipulation results in Excel.

Link Configuration

A typical URL you might use for your HTTP request will resemble this example:

https://app.clicktime.com/rpt?ID=2zYcls4UUBs&Email=usersemail%40usersdomain.com&UserKey=UfI6GfZJydI%3d&StartDate=20090131& EndDate=20100131&Format=xml

Required URL parameters:

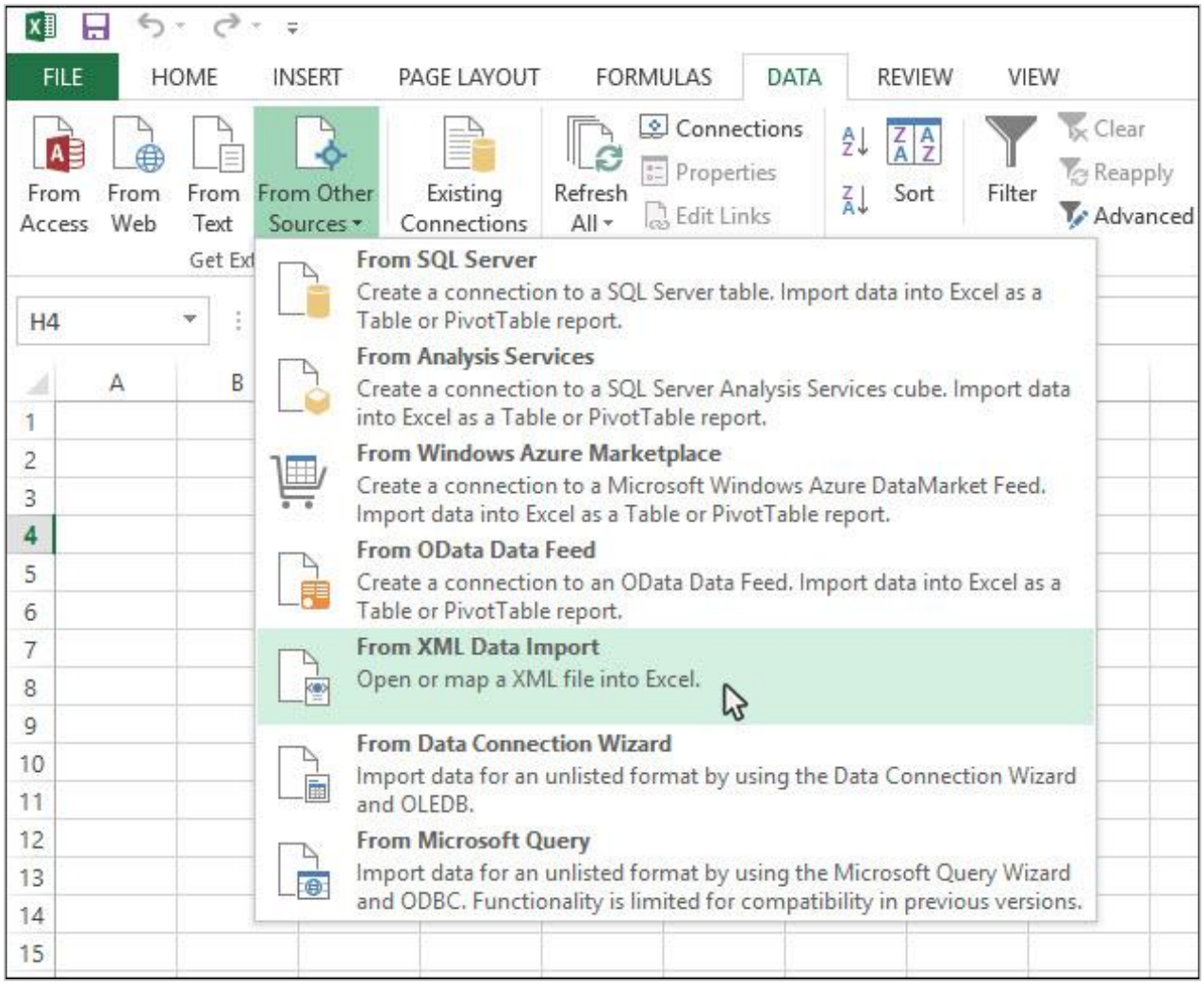
- **ID**. The ID of the saved Customizable Data Export report.
- **Email**. The email address of the owner of the saved report. This is used for authentication.
- **UserKey**. This is used for authentication.

Optional parameters:

- **StartDate**. The beginning date to use for the date range of data to be retrieved. Providing a value causes the value stored in the saved report definition to be ignored. This should be provided in an ISO date format (e.g. 20090131).
- **EndDate**. The end date to use for the date range of data to be retrieved. Providing a value causes the value stored in the saved report definition to be ignored. This should be provided in an ISO date format (e.g. 20100131).
- **Format**. This defines the format of the exported data that gets returned. The possible values for this are Text (tab-delimited), CSV (comma delimited), and XML (referred format for Excel on Windows). If no value is provided the default format is XML.
- **DivisionID**. Append one or more (scrambled) Division IDs to the query string. Multiple IDs are separated using the URL-encoded comma value of "%2C".
  NOTE: Scrambled ID values can be obtained from either the query string while editing a division or from the "Export Division List" report under the Miscellaneous category.
- **JobID**. Append one or more (scrambled) JobID values to the query string. Multiple IDs are separated using the URL-encoded comma value of "%2C".
  NOTE: Scrambled ID values can be obtained from either the query string while editing a job, or from the "Export Job List" report under the Miscellaneous category

Most customers use this URL for data integration with Excel. However, as detailed here, we can use this URL to link your ClickTime account to an external database, as well as many other applications.

Excel, Google Docs & More



Microsoft Excel

Excel supports "live" XML data import, which maintains an active reference to the originating URL. This allows you to refresh the spreadsheet's data on demand (or on a schedule), pulling in your very latest ClickTime data without going through the application itself at all.

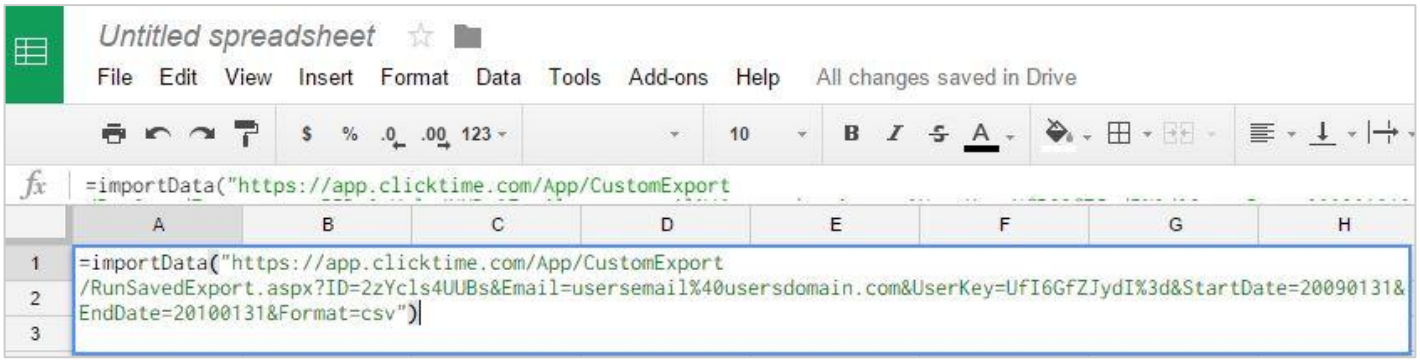
- In Excel, go to the Data tab and select *From Other Sources* then choose *From XML Data Import* (as shown above).
- When asked to select a file, instead paste the link URL you copied from ClickTime into the *File Name* field. Then click *Open*, select where you want to put the data and *OK*.
- To update data in the sheet with fresh data from ClickTime, go to the Data tab and choose *Refresh All*.

Google Sheets

This works very similarly to Excel in behavior but implementation is slightly different:

- Ensure that your link URL has the format set to csv.
- Copy and paste your link URL into a cell on your worksheet following the below format. Please note you will prefix the link with ***=importData(“*** and appended with ***Format=csv”)*** (please see the examples below):

  =importData("https://app.clicktime.com/App/CustomExport /RunSavedExport.aspx?ID=2zYcls4UUBs&Email=usersemail%40usersdomain.com&UserKey=UfI6GfZJydI%3d&StartDate=20090131& EndDate=20100131&Format=csv")



Security Concerns

Data Integration allows an administrator or manager to access ClickTime data without having to log into the ClickTime application, simply by updating the linked Excel file. When updating the Excel file, no other extra security checks are being performed. Any person with access to the file will be able to update it and see all type of data available in the report.

Important Access Information

The URL provided in the saved Customizable Data Export is based on the login information of the user who created the report. If for some reason the user changes his/her login email and/or password, the URL will no longer work and the linked file will no longer connect to ClickTime to retrieve data. If you are the creator of such a report and have any security concerns or are afraid your external application (e.g. Excel) file is being accessed by unauthorized users, simply change the password you use to access your ClickTime account. Similarly, if you change your password by mistake, the link between the external application and ClickTime will no longer work.

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Have additional questions?

Contact us at 415-684-1180
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