



## **Exporting Projetex Data Guide**

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## Exporting Projetex data

Projetex data can be exported to TXT, XLS, CSV, HTML, RTF and PDF file formats. There are two alternative data export procedures:

- Simple data export from Projetex Workstation, using Local Report options. This can be done almost with any Projetex window. For details please see [Simple data export](#).
- Custom queries export, which assumes exporting data directly from Projetex database with the help of Custom Queries. This is the most flexible data export method, which allows exporting almost any scope of data. Custom queries export is available only for Projetex Server Administrator users. For details please see [Advanced data export](#).

In both export cases we recommend using CSV format, since working with data in CSV tables is more convenient.

## Simple data export

To export any table from [Projex Workstation](#):

1. Open this table in [Projex Workstation](#).
2. Click **Export** button on the **Local Report** panel at the bottom of [Projex Workstation](#) window.

The screenshot shows the Projex Workstation interface with a table of client jobs. The table has columns for Code, Job Name, Project, Assigned, Deadline, Completed, Price (EUR), and Job Total (EUR). A callout bubble points to the 'Export' button in the 'Local Report' panel at the bottom of the window.

Code	Job Name	Project	Project	Assigned	Deadline	Completed	Price (EUR)	Job Total (EUR)
J-DEFDES0001	Engine scheme ER-34221	18	Engine scheme ER-34221	15.04.2011	08.06.2011 18:43	- No -	0.1925	4102.75
J-DEFDES0005	Engine scheme ER-34221	18	Engine scheme ER-34221	19.05.2011	27.05.2011 17:44	16.06.2011 18:00	0.00	0.00
J-DEFDES0006	Engine scheme ER-34221 (DTP)	18	Engine scheme ER-34221	19.05.2011	27.06.2011 18:00	- No -	0.1078	539.00
J-LIGRA0001	Graphic translation	19	Marketing booklet	04.09.2010	01.12.2010 18:00	01.12.2010 18:00	0.0616	2464.00
J-LIGRA0002	Content translation	19	Marketing booklet	04.08.2010	09.08.2010 18:00	09.08.2010 18:00	0.1155	1101.87
J-LIGRA0012	DTP	19	Marketing booklet	04.06.2010	07.07.2010 18:00	07.07.2010 18:00	0.0308	1293.60
J-CCT0001	"New challenges in virtual world"	20	"New challenges in virtual world" arbi	01.03.2011	19.04.2011 18:00	31.05.2011 11:48	75.00	750.00
J-CCT0004	"New challenges in virtual world"	20	"New challenges in virtual world" arbi	05.01.2011	28.01.2011 18:00	- No -	0.20	468.00
J-DFC0001	H-210 smartphone 1st part	21	HIGHTECHPRO H-210 smartphone	29.03.2011	26.05.2011 18:00	Planned	0.0924	36.96
J-DFC0003	H-210 smartphone 2nd part	21	HIGHTECHPRO H-210 smartphone	24.02.2011	06.04.2011 18:00	Planned	0.154	532.69
J-DNE0001	Content translation	22	Translation conference report	07.05.2011	30.05.2011 18:00	30.05.2011 18:00	0.07	700.00
J-DNE0002	Conference report (proofreading)	22	Translation conference report	26.01.2011	01.04.2011 18:00	01.04.2011 18:00	0.02	460.00
J-RELNET0001	VPN connection	23	VPN connection troubleshooting	14.05.2011	04.06.2011 18:00	06.06.2011 18:00	0.13	1950.00
J-RELNET0002	VPN connection	23	VPN connection troubleshooting	20.05.2011	20.05.2011 18:00	11.06.2011 18:00	15.00	30.00
J-RELNET0005	Project proofread	23	VPN connection troubleshooting	27.04.2011	14.05.2011 18:00	- No -	0.04	1320.00
J-LLDES0001	Tooltips translation	24	Virtual Interface Notes	30.12.2010	21.01.2011 18:00	21.01.2011 18:00	45.00	45.00
J-LLDES0002	Localization of interface strings	24	Virtual Interface Notes	03.05.2011	09.05.2011 18:00	09.05.2011 18:00	0.10	1400.00
J-LLDES0003	User hints translation	24	Virtual Interface Notes	30.12.2010	03.02.2011 18:00	14.05.2011 18:00	0.05	170.00
J-LLDES0007	Interface localization	24	Virtual Interface Notes	30.12.2010	23.02.2011 18:00	27.02.2011 16:10	0.30	13500.00
J-LLDES0008	Interface corrections	24	Virtual Interface Notes	30.12.2010	01.03.2011 18:00	01.04.2011 11:58	0.05	2250.00
J-LLDES0009	Virtual Interface Notes - MS termin	24	Virtual Interface Notes	30.12.2010	01.04.2011 18:00	29.04.2011 16:10	1500.00	1500.00
J-DEFDES0002	LS Drive - 1305m - English > Swe	25	LS Drive - 1305m	17.11.2010	18.12.2010 18:00	18.12.2010 18:00	0.0693	1732.50
J-DEFDES0004	LS Drive - 1305m Spanish English	25	LS Drive - 1305m	03.12.2010	18.12.2010 18:00	18.12.2010 18:00	0.0616	2772.00
J-DEFDES0003	LS Drive - 1305m French > English	25	LS Drive - 1305m	18.12.2010	18.12.2010 18:00	16.12.2010 18:00	0.0539	1078.00
J-DFC0002	H-210 instruction translation	26	Localization of			31.05.2011 18:17	0.1386	554.40
J-DFC0004	H-210 instruction - corrections	26	Localization of			- No -	0.0385	477.40
J-DFC0005	H-210 instruction - DTP work	26	Localization of			- No -	0.0385	1885.50
J-DFC0006	Design verification	26	Localization of			30.05.2011 16:17	385.00	385.00
J-DFC0007	H-210 instruction - terminology	26	Localization of			- No -	654.50	654.50
J-GCU0001	Tax policy in EU translation	27	Tax policy in EU			On Hold	0.0017	42.38
J-GCU0003	Tax policy in EU proofread	27	Tax policy in EU			On Hold	0.0019	10.13

3. Select export format and click **OK** button.

To export *list of all clients, projects, corporate experts* or *freelancers* from [Projex Workstation](#):

1. Open **Main tab** of **Client, Project, Corporate Expert** or **Freelancers** window.
2. Right-click on *clients, projects, corporate experts* or *freelancers list* and click **Export to TXT** or **Export to CSV**.
3. Choose a location of file, which will contain exported data, and click **Save**.

To export **Custom Reports**:

1. Click **Reports** menu.

2. Select a custom report in the list.
3. Click **Export** button.
4. Select export format and click **OK** button.

You can disable *export options* for specified user in **Users and Access Settings** of **Corporate Settings** in *Projetex Server Administrator*.

To edit user access rights to *export options* you will need access to *Projetex Server Administrator*.

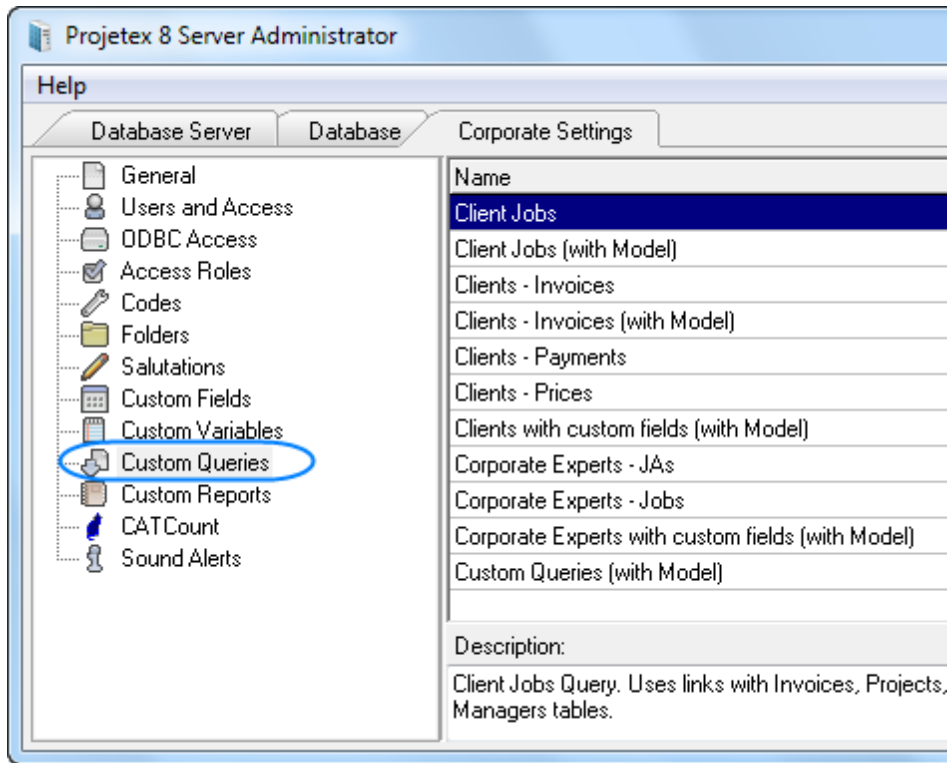
1. Run *Projetex Server Administrator*.
2. Click **Database** tab.
3. Put your database offline by clicking **Go Offline** button.
4. Once database is offline, switch to **Corporate Settings** tab.
5. Click **Users and Access** section, select required user in the list and click **Edit** button.
6. In the **Edit User** window select or clear the **Export Local Report** and **Print Local Report** option to enable or disable access to *export options* (except **Export Custom Report** option).
7. In the **Edit User** window select or clear the **Custom Reports View** option to enable or disable access to **Custom Reports**.

## Advanced data export

Any data stored in *Projetex Server* can be exported directly from database using custom queries.

To export data directly from database:

1. Run *Projetex Server*.
2. Switch to **Database** tab.
3. Click **Go Offline** button.
4. Click **Corporate Settings** tab.
5. Click **Custom Queries**.

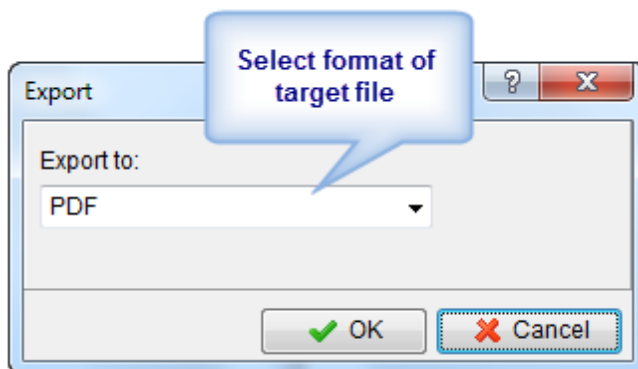


6. Select a query in the list.
7. Click **Export** button.
8. Select export format and click **OK** button.

## Export Windows

### Export

Export window can be used to select an export format.



- Choose **Open after export** checkbox to automatically open the exported file after finishing of an export procedure.
- Click **OK** button to proceed with exporting to currently selected format.
- Click **Cancel** button to close **Export** dialog.

## Export to XLS, CSV or TXT

To export data to *XLS*, *CSV* or *TXT*, select **XLS**, **CSV** or **TXT** from the **Export to** drop-down list on the **Export** window. Choose **Open after export** checkbox to automatically open the exported file after finishing of the export procedure

## Export to HTML

In the **Export to .html** window you can set properties of output file when exporting to .html format.

It opens when you select **HTML** from the **Export to** drop-down list on the **Export** window.

### Settings for exporting to .html

Page range:

- select **All** to export all pages of the source;
- select **Current page** to export only the page which you are currently viewing;
- select **Pages** and specify the numbers in the text box provided to print only certain pages.

Export settings:

- select **Styles** to save style setting of the source when exporting;
- select **Pictures** to enable exporting pictures from the source file;
- select **All in one folder** to store all newly created files of the .html page in one folder;
- select **Page navigator** to add the page navigator (see the screenshot below) to your new .html file;



- select **Fixed width** to fix the width of the columns and rows of the exported pages (pages will not extract and contract according to the window size);
- select **Multipage** to export data to a multi-page .html file;
- select **Background** to keep the view of the background in the target .html file.

- choose a format of pictures from **Pictures** drop-down list to save pictures in a specified format.

To automatically open the new file after finishing of the export procedure, select **Open after export**

## Export to RTF

In the **Export to RTF** window you can set properties of output file when exporting to .rtf format.

It opens when you select **RTF** from the **Export to** drop-down list on the **Export** window.

### Settings for exporting to .rtf

Page range:

- select **All** to export all pages of the source;
- select **Current page** to export only the page that you are currently viewing;
- select **Pages** and specify the numbers in the text box to print only certain pages.

Export settings:

- select **Pictures** to enable exporting pictures from the source file;
- select **WYSIWYG** (What You See Is What You Get) to make the .rtf file look exactly as the picture you see on the screen
- select **Page breaks** and page breaks will be compulsively inserted in the .rtf file;
- select **Text**, **Header/Footer** or **None** from **Header/Footer** drop-down list for header and footer to be shown properly.

To automatically open the new file after finishing export procedure select **Open after export** checkbox.

## Export to PDF

In **Export to PDF** window you can set properties of output file when exporting to .pdf format.

It opens when you select **PDF** from the **Export to** drop-down list on the **Export** window.

### Settings for exporting to .html

Page range:

- select **All** to export all pages of the source;
- select **Current page** to export only the page you are currently viewing;



- select **Pages** and specify the numbers in the text box to print only certain pages.

Export settings

- select **Compressed** to create a .pdf file of minimal size;
- select **Embedded fonts** to create a .pdf file with all used fonts embedded (using this option you can be sure that you text will look the same on any computer, even if the fonts used are not installed there);
- select **Background** to keep the view of the background in the target .pdf file;
- select **Print optimized** to optimize the new .pdf file for printing at once.

To automatically open the new file after finishing export procedure select **Open after export**.

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