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 <u>Simple data export</u>.

- 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 <u>Advanced data export</u>.

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 Projetex Workstation:

1. Open this table in Projetex Workstation.

2. Click **Export** button on the **Local Report** panel at the bottom of Projetex Workstation window.

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

To export *list of all clients*, *projects*, *corporate experts* or *freelancers* from Projetex 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**.
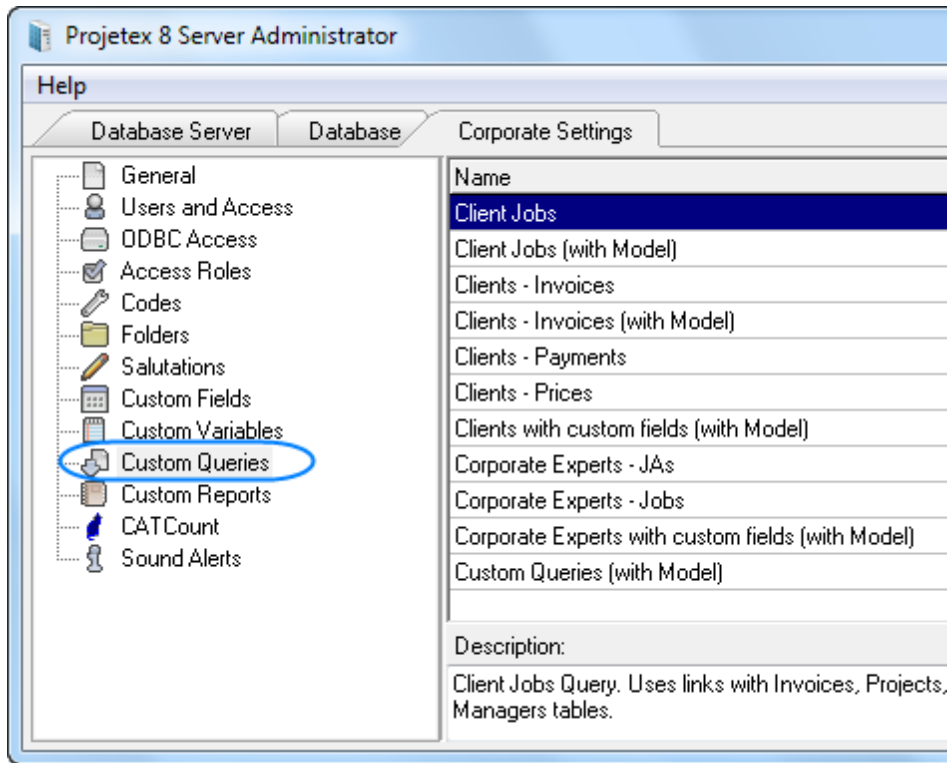
6. Select a query in the list.

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.
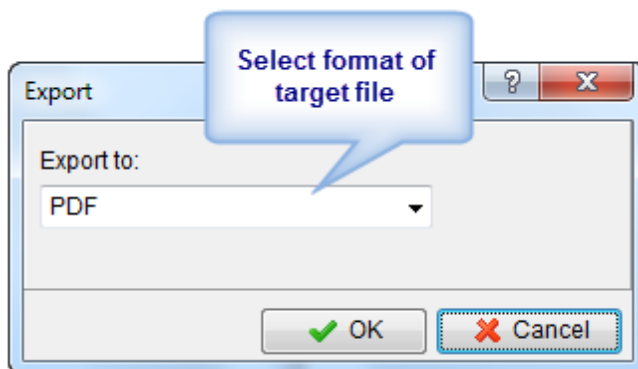
- Choose **Open after export** checkbox to automatically open the exported file after finishing of an export procedure.

- 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;

| First | Prev | 2 | Next | Last |

- 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**
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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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