Projetex Import Utility Guide

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1 Importing Database

Client and freelancer data can be imported to Projetex with the help of Projetex Import Utility.

Projetex Import Utility is included in Projetex setup.

Projetex Import Utility can be used to:

- Import *client* information and prices.
- Import *freelancer* information and prices.

Projetex Import Utility supports data import from the following file formats:

- *XLS* (Microsoft Excel);
- *DBF* (dBase 5, dBase III, dBase IV);
- *TXT* (Text);
- *CSV* (Comma Separated Values);
- *XML* (Data Packet V.2.0).

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2 Data import procedure

Before you begin importing data, switch to offline Projetex database and launch Projetex Import Utility. One way to do so is to run the following executable:

C:\Program Files\AIT\Projetex 9\Projetex Server\Import\Projetex7Import.exe

Alternatively, use Windows **Start** menu to run Projetex Import Utility on server PC.

1. Preparing to import

Select the *type of information* you want to import: *client information* or *freelancer information*.

Select the *format of source data file* you are going to import.

Specify *path to the source file* you are going to import data from.

2. Target fields in Projetex database

Target fields are the fields in Projetex database where you are importing data. For example, *Client name* is a target field. Below are some basic recommendations on how to prepare fields for importing. The import procedure itself is described in step 3.

1. If possible, split up the data according to the fields available. Information from one source file field must correspond to one field in Projetex database.

> **Example:**
>
> If you have all the address information (country of residence, primary address, secondary address, and so on) stored in one field or column of the source file, split this data into several columns: *country*, *address1*, *address2*. If there are no appropriate fields for some piece of information, you can add the necessary fields manually: shut down the utility first and then add all necessary fields with the help of Custom Fields section of Projetex Server Administrator.

2. The newly created custom fields should appear at the end of the **Target Fields in Projetex Database** list. If the fields do not appear, please check whether they were created correctly using Projetex Server Administrator.

Price Group, Price Service, Price Unit and Price Value fields were added to enable importing clients/freelancers prices. Price Value cannot have negative value. Only one column should correspond to Price Service field.

> **Example:**
>
> If its value is a language pair, like "*English => French*", the string should be a single whole, not "*English*" in one column and "*French*" in another column. *Price Group* field is not mandatory, as its value is set "*Translation*" automatically, if other is not specified.

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3. Clients can have more then one price (more then one service in other words). In this case, add additional line per each of the prices.

Example:

Supposing you need to import information about a client, which has two prices: *English => French* price and *English => Japanese* price. To import these prices under the same client, you need to duplicate the information about this client a number of times equal to the number or price records (services):

Client	...	Language Pair	Units	Price
Alter Ego Solutions	...	English => French	words	0.01
Alter Ego Solutions	...	English => Japanese	words	0.12

To avoid creating two "*Alter Ego Solutions*" client records in Projetex database, set **Import Mode** to **Import New** and specify the list of fields, by which it can be determined that current client has been already imported and only price data should be imported now.

3. Linking source document to target fields

Import Utility will import data from certain area of your *source document* to certain field in Projetex database. Thus, the most important importing step is linking data in your document to certain field in the database. Linking procedure may vary, depending on the source document type.

4. Regional settings: Base Formats

Adjust regional settings on **Base Formats** tab so that Projetex Import Utility could recognize separator symbols in dates and numbers, date formats and other regional-specific settings used in the source document:

Decimal separator – set a character, which delimits the decimal parts of the numbers in source file.

Thousand separator – set a character, which separates the digit groups in the source file numbers.

Date separator – set a character, which separates the groups of dates in source file.

Time separator – set a character, which separates the groups of time strings in source file.

Short date, **Long date**, **Short time**, **Long time** – use these fields to set the date and time formats used in source file.

Boolean True – set some variants of TRUE value representation in the source file, e.g. 'Yes' or '+'.

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Use new line for each new variant.

Boolean False – set some variants of FALSE value representation in the source file, e.g. 'No' or '–'. Use new line for each new variant.

Null Values – set some variants of null value representation in the source file, e.g. '0' or 'Empty'. Use new line for each new variant.

5. Regional settings: Data Formats

You can customize format of each field being imported. Select the field in the field list on the left and set its format using the settings to the right.

Generator value – use this edit field to set the initial value of the autoincrement field.

Generator step – set the step of the autoincrement field. For instance, if **Generator value** field is set to 2 and **Generator step** field is set to 1, then first imported line will contain *"2"* in this field, second will contain *"3"* and so on. If **Generator step** field is set to 0, then the value of the generator will be ignored.

Constant value – use this option to set the constant value of the field.

Null value – set the value, which Projetex Import Utility should read as NULL value.

Default value – set the value which will be inserted in the database by Projetex Import Utility instead of NULL value.

Left quote – set a character or a number of characters, which denote opening quotation marker in the imported string.

Right quote – set a character or a number of characters, which denote closing quotation marker in the imported string.

Quote action – select Add to add quotation marks to the imported string, Remove to remove all the quotation marks from the imported string, or As Is to save the original quotation marks. **As is** option saves the original string char set.

Char case – set the case of the imported string. As Is saves the original string, **Upper** sets the whole string to upper case, **Lower** sets the whole string to lower case, **UpperFirst** sets the first letter of the string to upper case, **UpperFirstWord** sets the first letter of each word to upper case. **As is** option saves the original string char set.

Char set – change the character set of the imported string to *ANSI* or *OEM*. **As is** option saves the original string char set.

Use **Replacements** part of the dialog box to set the replacement list for the selected field. Click button to add an automatic replacement rule. Each rule will replace value entered in **Text to find** field with the one entered in **Replace with** field.

Example:

Set the following replacements for the field 'Continent':

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Text to find: `'South America'`, **Replace with**: `'S. America'`

Text to find: `'North America'`, **Replace with**: `'N. America'`

This means, that all the values *'South America'* of the field '*Continent*' will be replaced with values *'S. America'*, and values *'North America'* will be replaced with *'N. America'* respectively.

6. Selecting columns to import

Import Mode includes the following settings:

- **Insert All**: inserts all the records from the source file to the target object.
- **Insert New**: Inserts records which are not in the target object yet, others are skipped.
- **Update**: Updates those records that already exist in the target object, others are skipped.
- **Update Or Insert**: Updates existing records and inserts new records.

All options except **Insert All**, require specifying the *key fields*, by which Projetex Import Utility determines if Projetex database contains this record already. Usually client name and country are selected.

Import all records option – check this option to import all records from the source table.

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3 Importing from .xls

With Projetex Import Utility you can import data from your XLS files directly to Projetex database.

To link source and target fields:

1. Select the required target field from the **Target Fields in Projetex Database** list. This is the field in Projetex database *where* you wish to import data.

2. Click **Add** button.

3. Specify which column or which row to import data from, using **Range Type** settings. This is the field in source file *from* which the data must be imported.

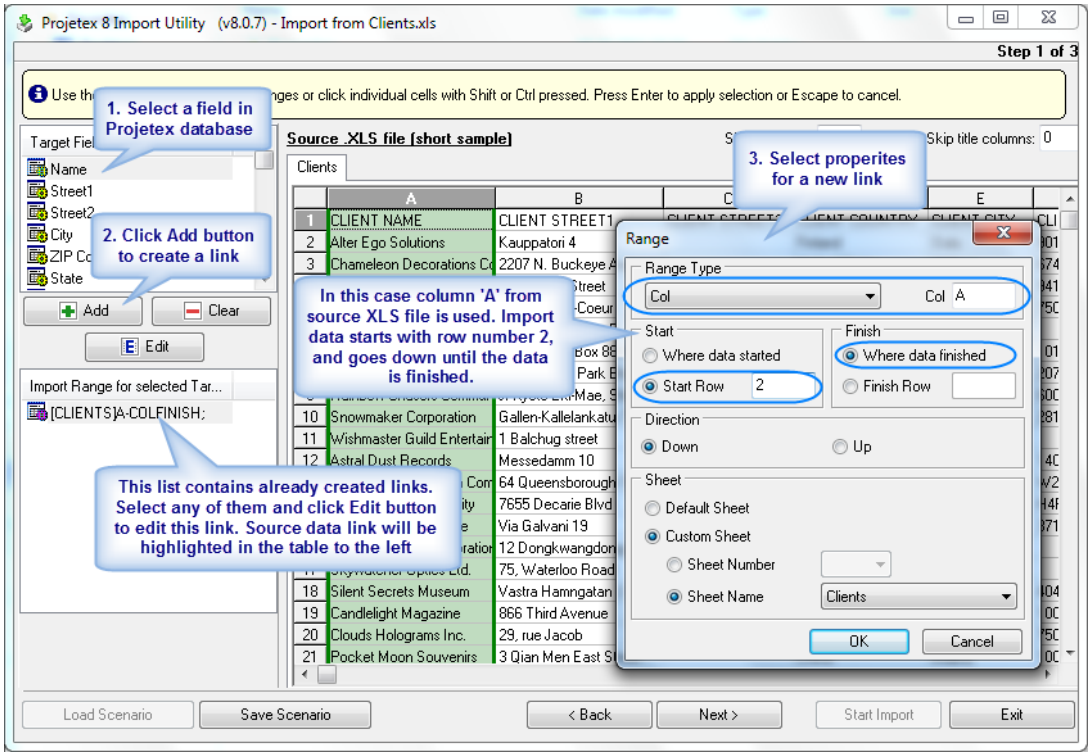
Alternatively, select required source fields by holding **Ctrl** or **Shift** key, and using mouse to select required fields right in the table.

Create links for all the fields you wish to import.

If you do not want some first rows or columns of the source table to be imported, set a starting and finish row or column in **Start** and **Finish** settings correspondingly.

Example:

Below the link was established between **Name** field in Projetex and column A of Microsoft Excel file.



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4 Importing from .dbf

With Projetex Import Utility you can import data from your DBF files directly to Projetex database.

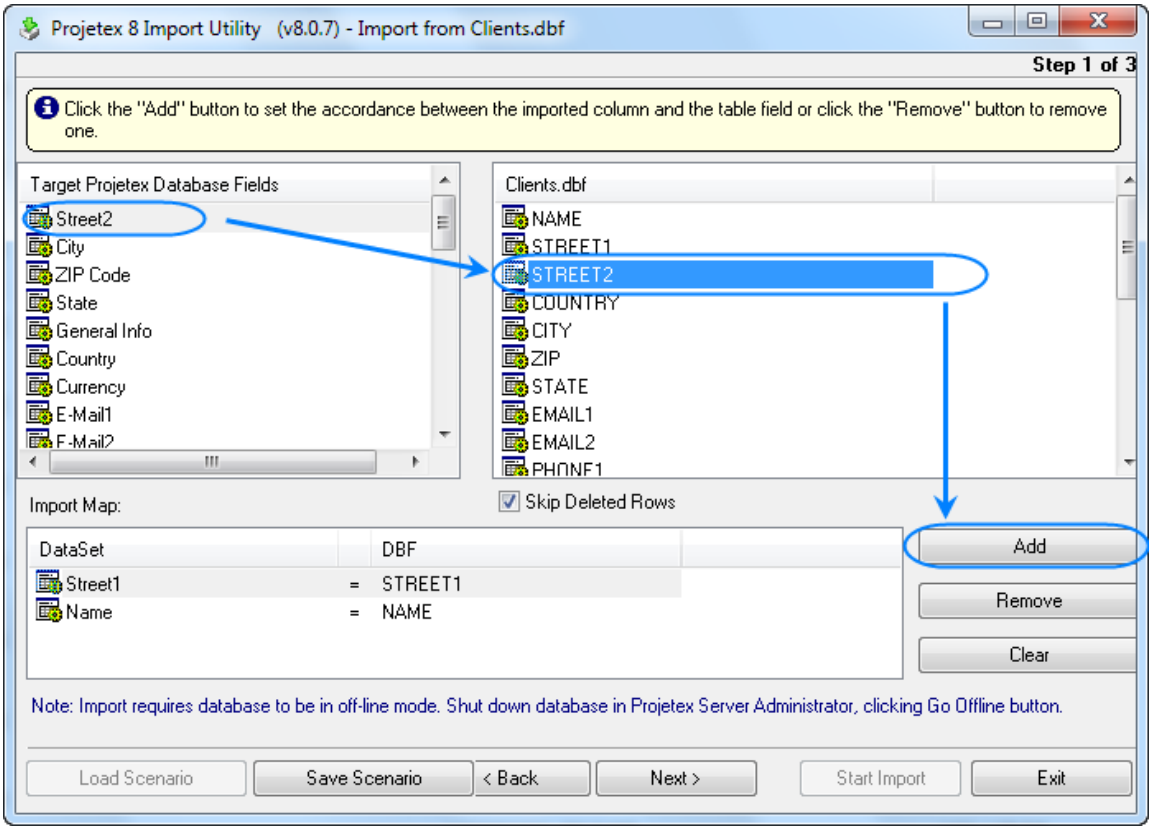
To link source and target fields:

1. Select the dataset field from the **Target Projetex Database Fields** list. This is the field *where* you wish to import data.

2. Select the corresponding field in the **<TABLE_NAME> .dbf** list. This is the field in source file *from* which the data must be imported.

3. Click **Add** to create a link. These fields will be added to the list at the bottom of the window.

Repeat these operations for each dataset field. If you want to remove the linkt, select the linked fields in the bottom list and click **Remove**.



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5 Importing from .txt

With Projetex Import Utility you can import data from your TXT files directly to Projetex database.

1. Select the dataset field from the **Target Fields** drop-down list. This is the field *where* you wish to import data.

2. Set two separator lines to delimit the source table column.

Note: To associate the selected field with a column, the column itself should be enclosed by delimiters (there should be delimiters from both sides).

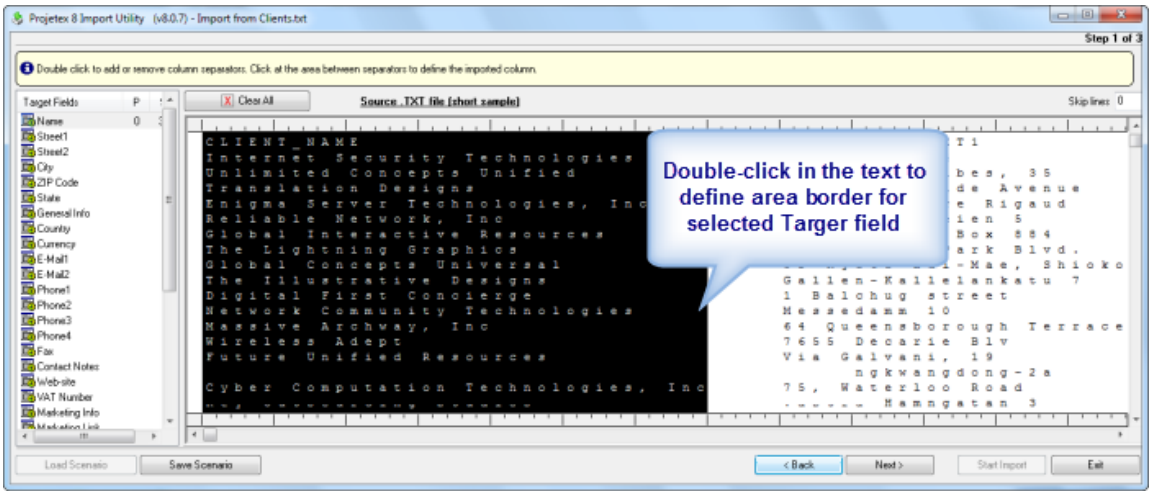
3. Double-click to add a border or delete one.

4. Drag separators to change the column width.

5. Right-click area between the two borders to select it as source for currently selected target field. This is the field in source file *from* which the data must be imported.

After you have set the separators, proceed to another field and repeat these operations for each dataset field.

If you do not want some first rows of the source table to be imported set the number of such rows in the **Skip ... first line(s)** edit field.



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6 Importing from .csv

With Projetex Import Utility you can import data from your CSV files directly to Projetex database.

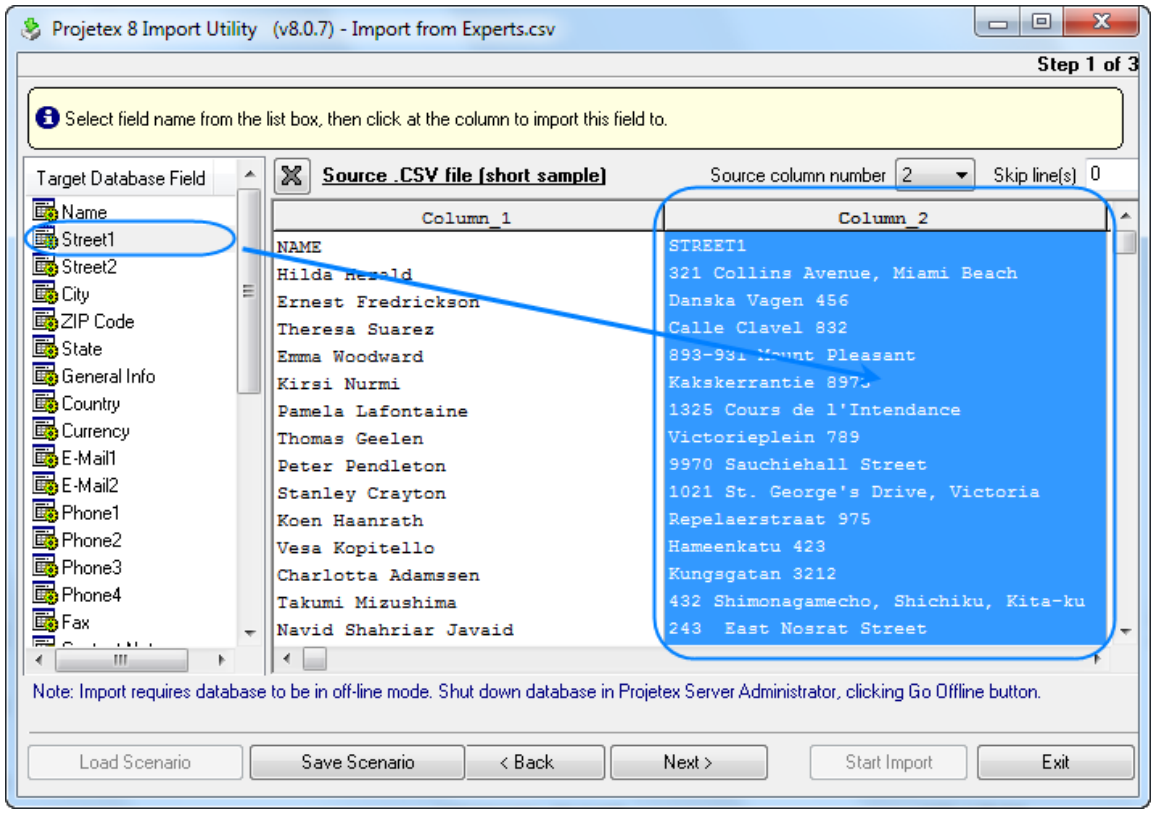
To before working with CSV file you need to specify delimiter (**Comma**) and text qualifier (**Quote**). You can select them manually from the corresponding drop-down lists or select **Auto** if you are not sure which delimiters are used in the file you import from.

1. Select the dataset field from the **Target Database Fields in Projetex Database** drop-down list. This is the field *where* you wish to import data.

2. Click the corresponding source table column or set the column value manually in the **Source column number** field. This is the field in source file *from* which the data must be imported.

Repeat these operations for each dataset field.

If you do not want some first rows of the source table to be imported set the number of such rows in the **Skip line(s)** edit field.



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7 Importing from .xml

With Projetex Import Utility you can import data from your XML files directly to Projetex database.

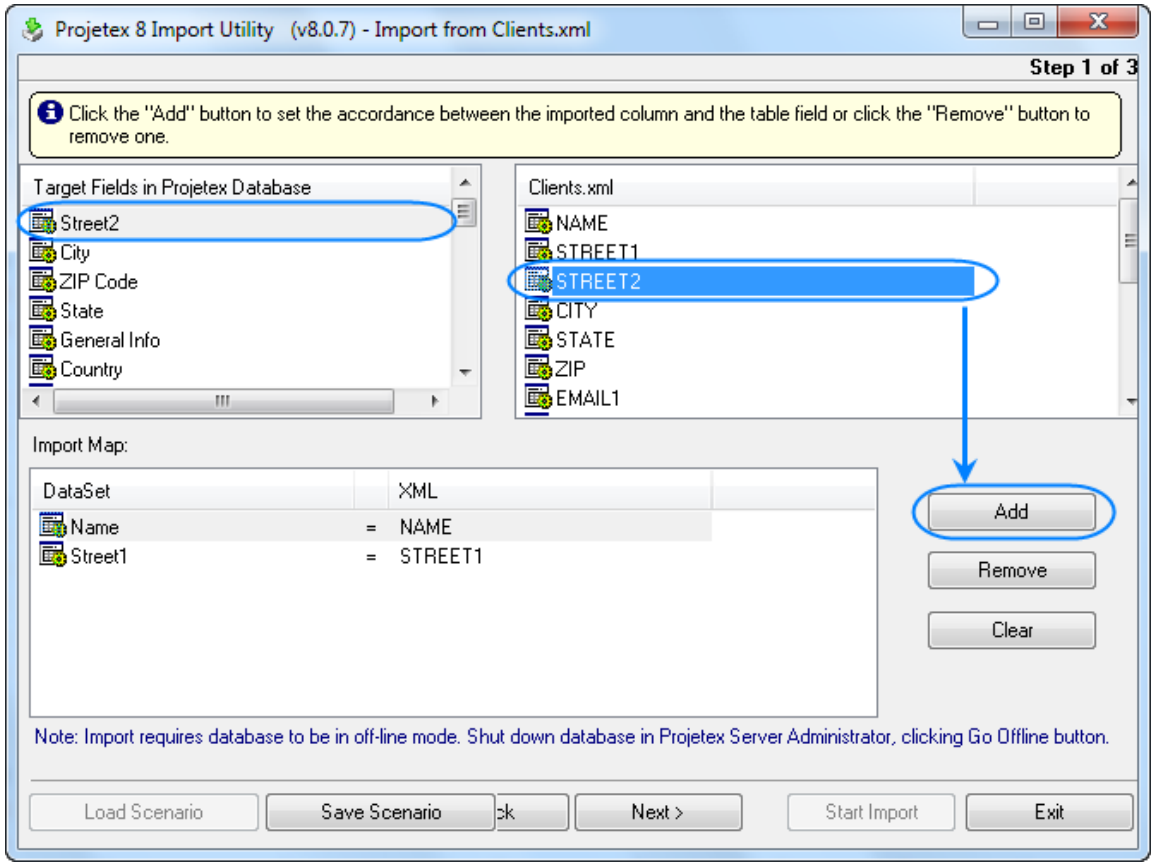
To link source and target fields:

1. Select the dataset field from the **Target Projetex Database Fields** list. This is the field *where* you wish to import data.

2. Select the corresponding field in the **<TABLE_NAME>.xml** list. This is the field in source file *from* which the data must be imported.

3. Click **Add** to create a link. These fields will be added to the list at the bottom of the window.

Repeat these operations for each dataset field. If you want to remove the link, select the linked fields in the bottom list and click **Remove**.



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8 Using scenarios for Import Utility

Scenarios in Projetex Import Utility are used to save all settings you have selected while importing in order to quickly use them during the future imports. For example, freelance experts profiles are expected to be imported quite frequently from expert application forms. By saving import scenario after your first import, future imports can be done by loading this scenario, and clicking next through all the steps.

You can save the scenario on any step clicking **Save Scenario** button. After opening this scenario later, you will not need to repeat all steps from the beginning and will start from the point, where you saved the scenario.

To open the previously saved scenario or the default one click **Load Scenario** button, it is available only from the tab where you select the format of the source file.

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