



Projetex Import Utility Guide

© 2020 Advanced International Translations

Table of Contents

1. Introduction	3
2. Range Editor	4
2.1. XLS Range Editor	4
2.2. XLSX Range Editor	6
2.3. DBF Range Editor	7
2.4. TXT Range Editor	8
2.5. CSV Range Editor	9
2.6. XML Range Editor	10
3. Formatting and Import Options.....	11
3.1. Base Formats	11
3.2. Data Formats	12
3.3. Import Options	14
4. Import Scenarios	15

1. Introduction

The Projetex 3D Data import Utility is used to import information about Clients and Freelancers from outside sources without the need to manually enter it.

The utility can import data from the following file types: XLS and XLSX (Microsoft Excel), TXT, CSV, DBF (dBase 3, 4 and 5), XML (Data Packet 2.0)

Import settings can also be saved in special scenario files, allowing you to import data from the same source regularly, without having to fiddle with the settings every time.

NOTE: It is highly recommended to backup your database before using the Data Import utility. This will allow you to quickly roll back unintended or undesired changes.

The first step when using the Data import utility is choosing whether you are importing Clients or Freelancers. Once the import is complete the data will be added to the corresponding table in Projetex.

Next, you choose the format of the source file. This is the step at which you can load a scenario file.

Finally, you select the actual source file. If you loaded a scenario beforehand, the file path to the source file will likely be pre-entered.

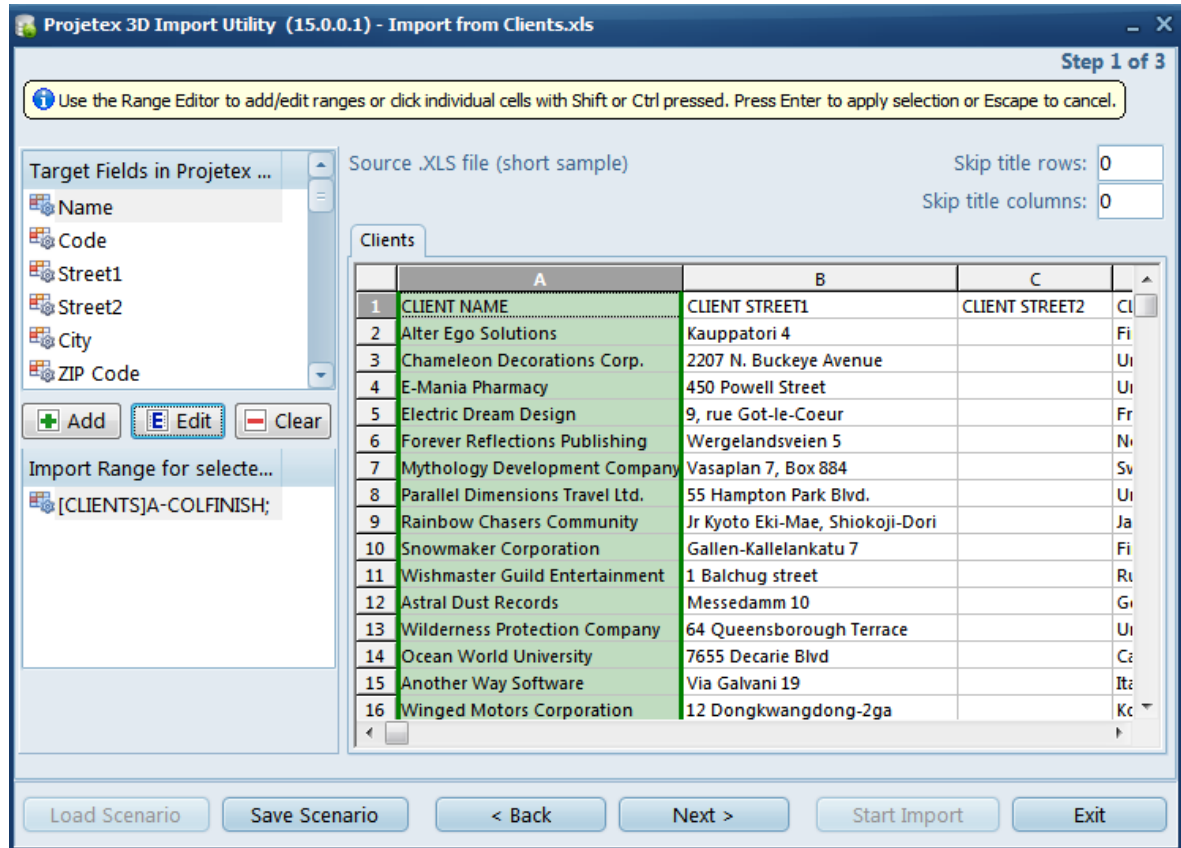
The next screen is the Range Editor. Its appearance will vary depending on the chosen format.

See the topics for each format for more details: XLS, XLSX, DBF, TXT, CSV, XML.

2. Range Editor

2.1. XLS Range Editor

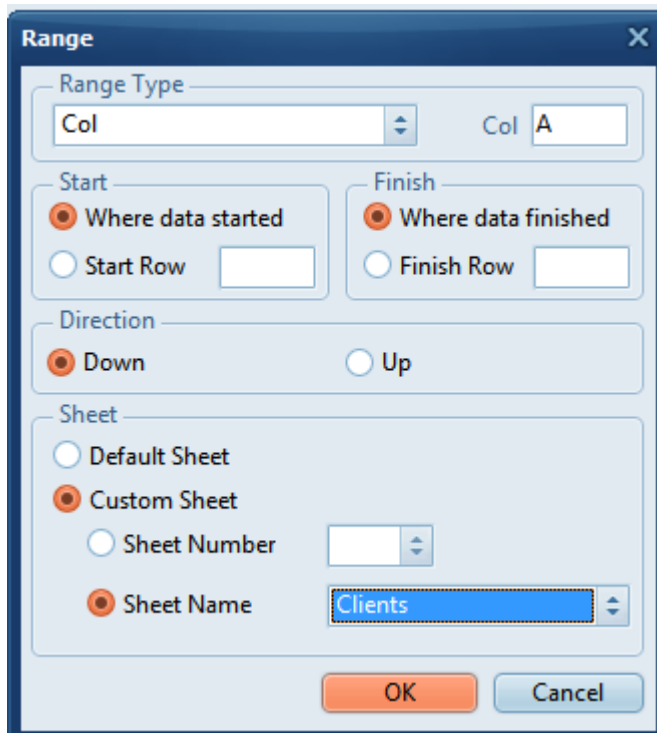
Used for pre-2007 Microsoft Excel files.



The two main elements are the **Target Field List** in the upper-left, and the file contents on the right side of the screen.

To designate a range of cells to be imported into a field of the Client (or Freelancer) table in Projetex, select the target field and click **Add**.

This will bring up the New/Edit Range dialog:



Here you can determine the range's type (row or column or single cell), its location and boundaries, as well as the direction in which the data in it should read.

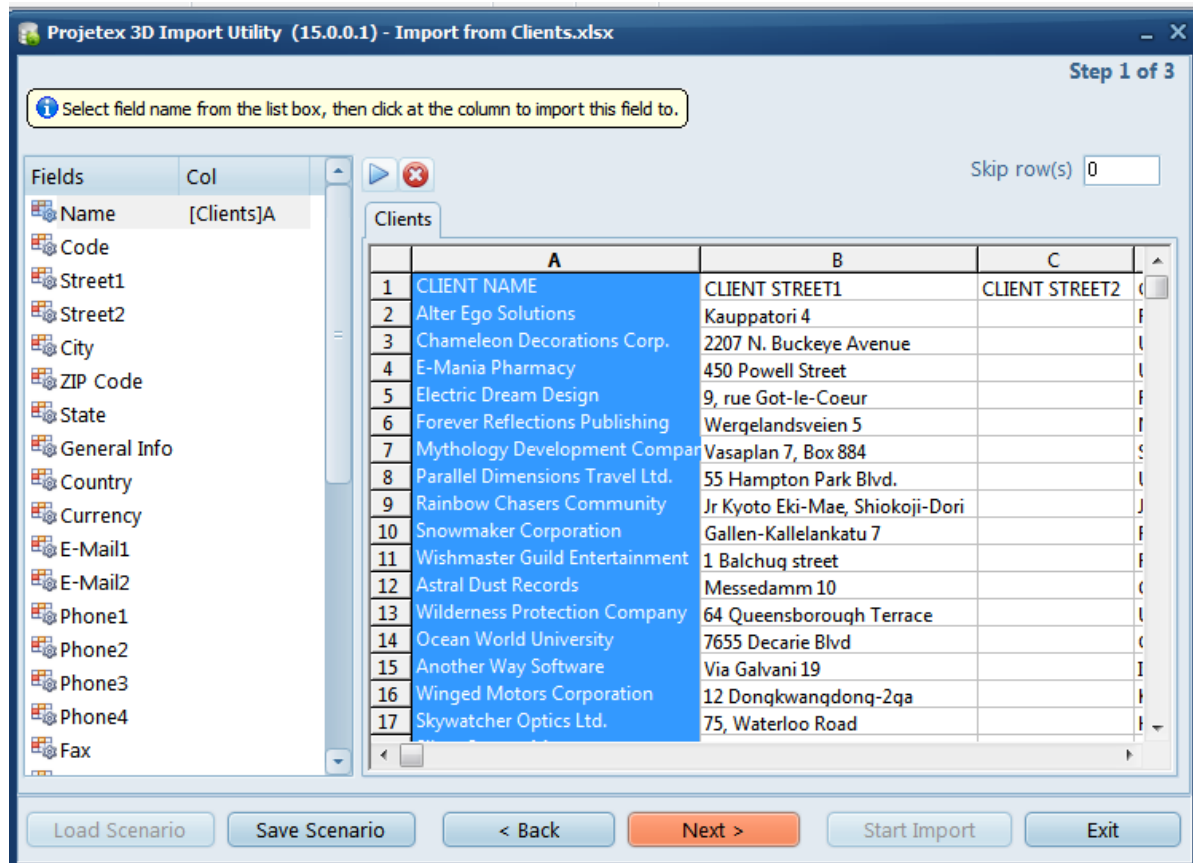
A single target field can have multiple ranges. An existing range can be edited or removed.

Alternatively, you can hold **Ctrl** or **Shift** and click the rows/columns/cells you want to add to a particular range. Press **Enter** to confirm your selection or **Escape** to cancel it.



If the table has a number of title rows and/or columns, they can be skipped by inputting their number into the **Skip title rows/columns** filed in the upper-right corner of the main editor.

2.2. XLSX Range Editor

Used for Microsoft Excel 2007 and newer files.



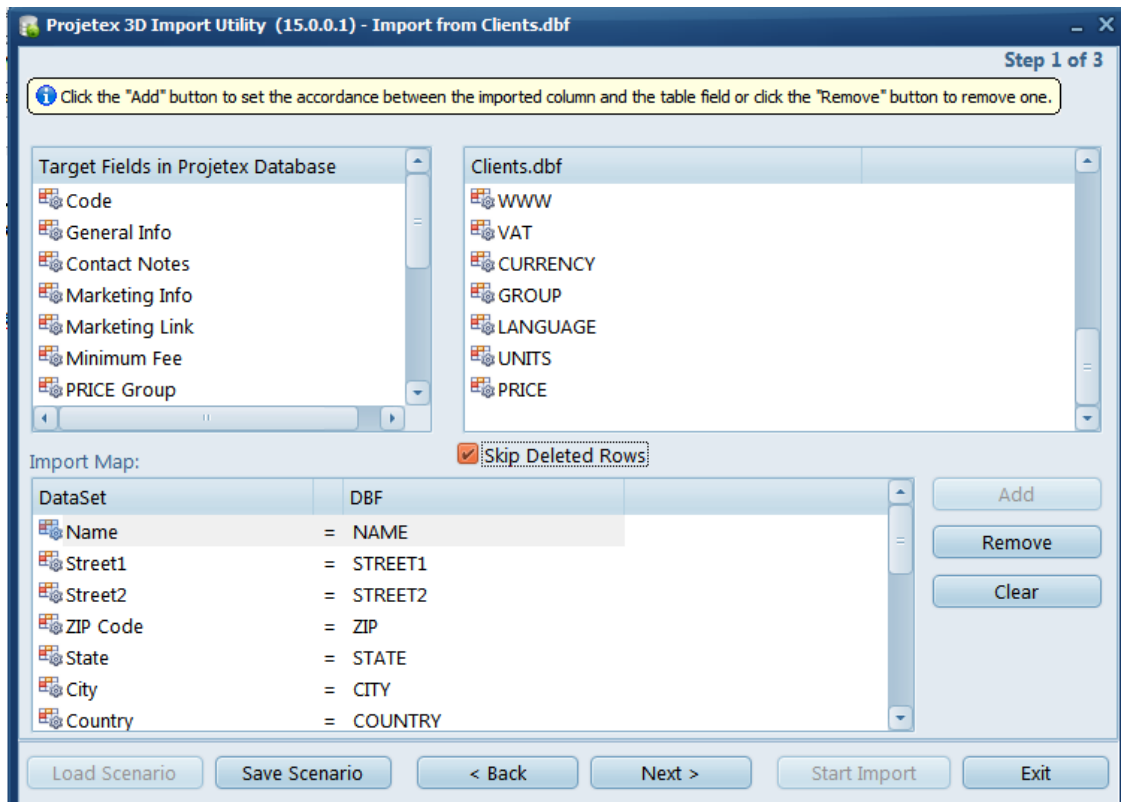
Select a Projetex database field from the left-hand list and click the corresponding column in the table to the left to assign that column to the field.

The **Auto-assign**  button will automatically assign columns to fields based on their order and **Cancel**  will clear all selections.

Use the **Skip Row(s)** field to exclude title rows from the import.

2.3. DBF Range Editor

Used for dBase 3, dBase 4 and dBase 5 files.



Select the target and source fields in the top half off the screen and click Add to set up a link between them.

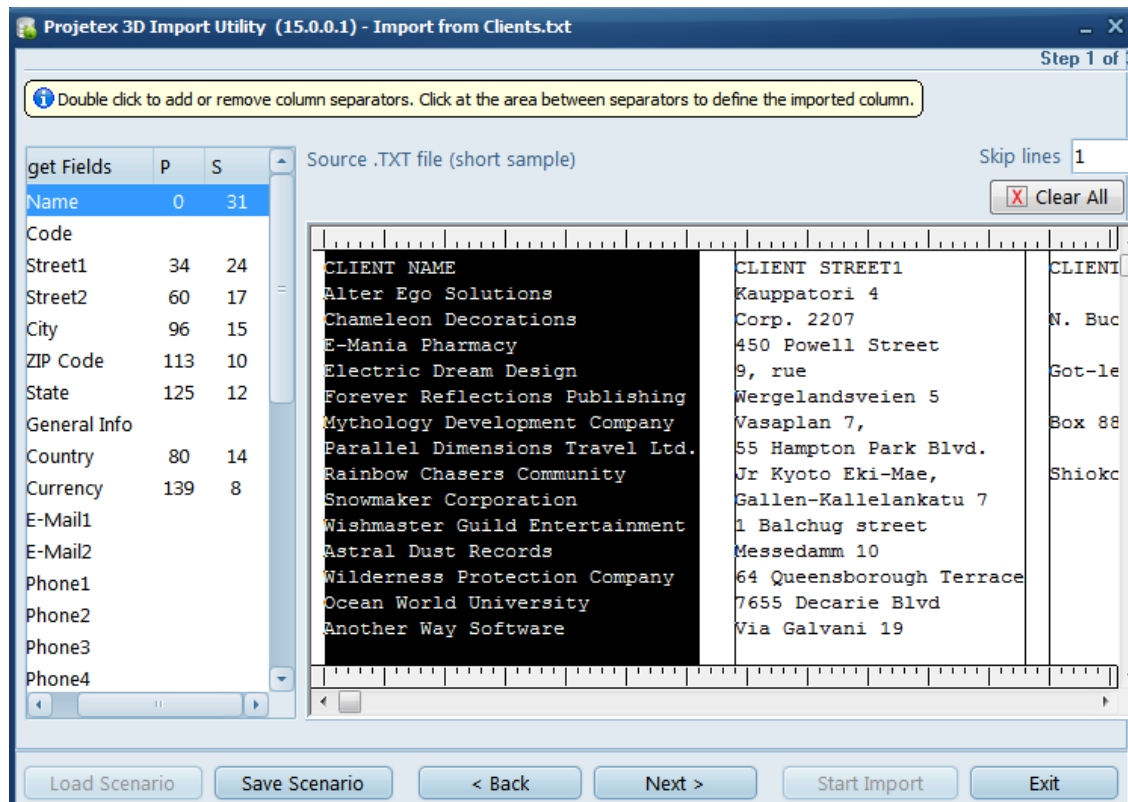
Click Remove or Clear to cancel a particular link or all links, respectively.

One peculiar feature of dBase is that deleted records are not immediately removed from the database, instead they are just given the "deleted" status, emulating a "recycling bin" kind of functionality.

You can choose to either skip these rows or import them with the **Skip Deleted Rows** checkbox.

2.4. TXT Range Editor

Used for whitespace-separated TXT databases.



Important Note: The spaces between the columns in the file must be filled with whitespace characters, not tab characters.

To import data from a TXT file, you must first define the columns by placing separator lines.

Double click to place and remove separators, click and drag to move them. The space between two separators should completely cover the longest entry in that column.

Once all separators are placed, select fields from the list to the right and click the required columns in the table. The import utility will record the starting point and width of the column for each field.

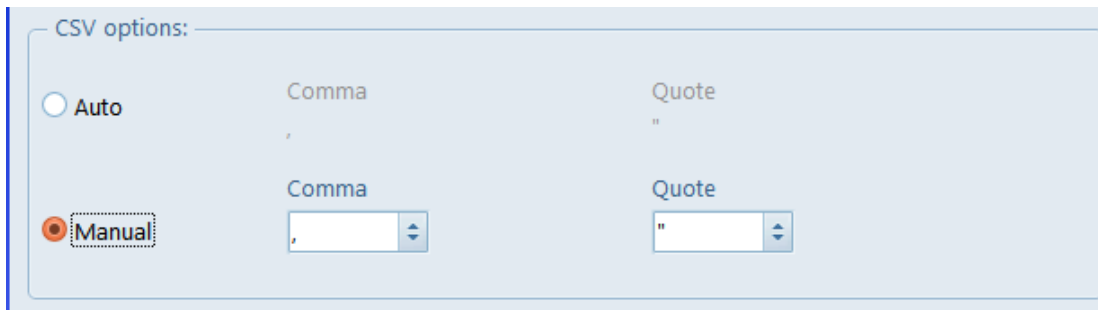
Use the **Skip Lines** field to skip title lines.

Clicking **Clear all** will remove the mapping between the columns and database fields, but not the separators.

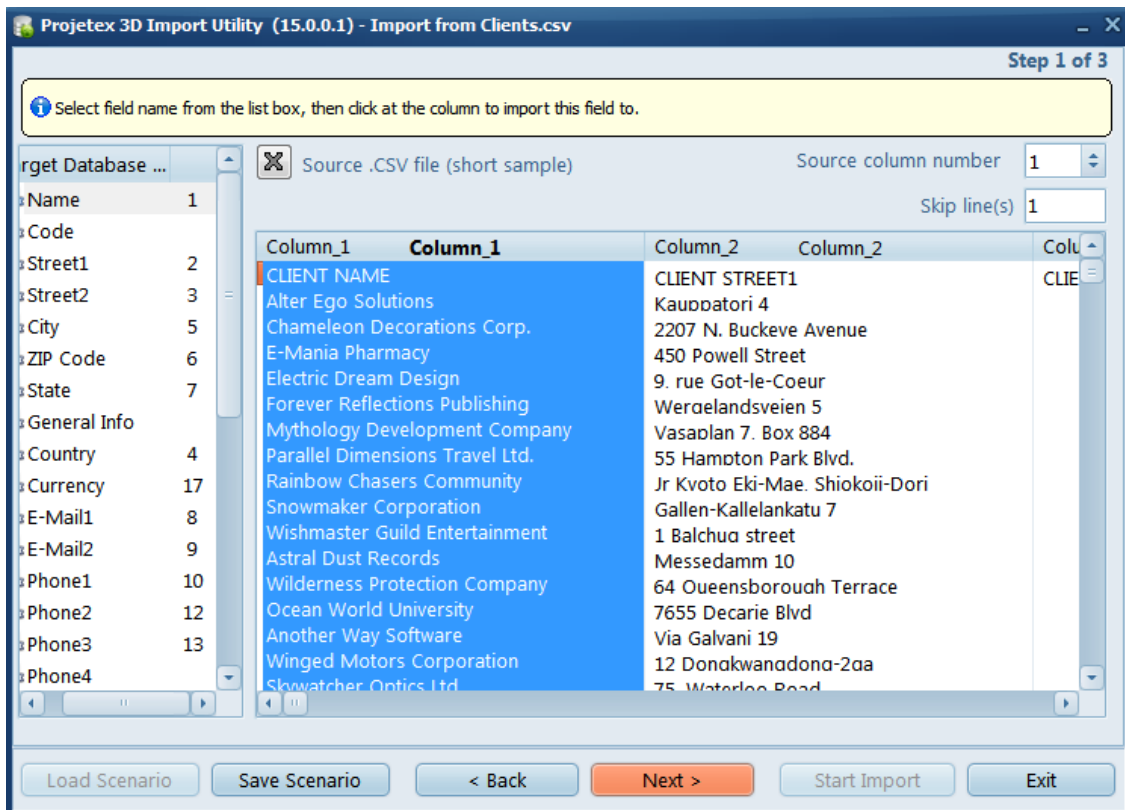
2.5. CSV Range Editor

Used for Comma Separated Values files.

Before going to the range editor itself, you can adjust the "comma" and "quote" symbols that the utility will be looking for while reading the file, since some files can use symbols different from the standard.



The interface of the CSV Range Editor proper is quite similar to that of the XLSX range editor.

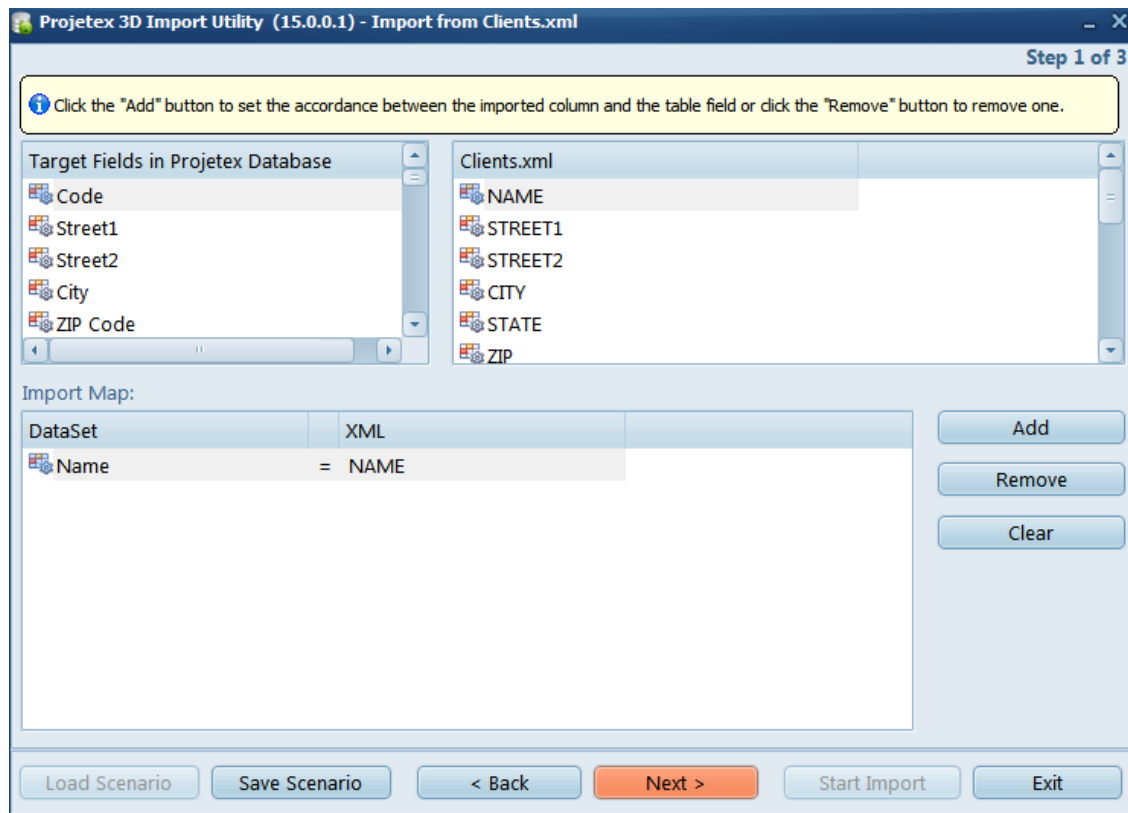


Select a database field and click a Column in the file display to link it to that field. Click the 'X' button to clear all links.

Use the Skip lines field to exclude title lines.

2.6. XML Range Editor

Used for Data Packet V 2.0 files.



Select the target and source fields in the top half off the screen and click **Add** to set up a link between them.

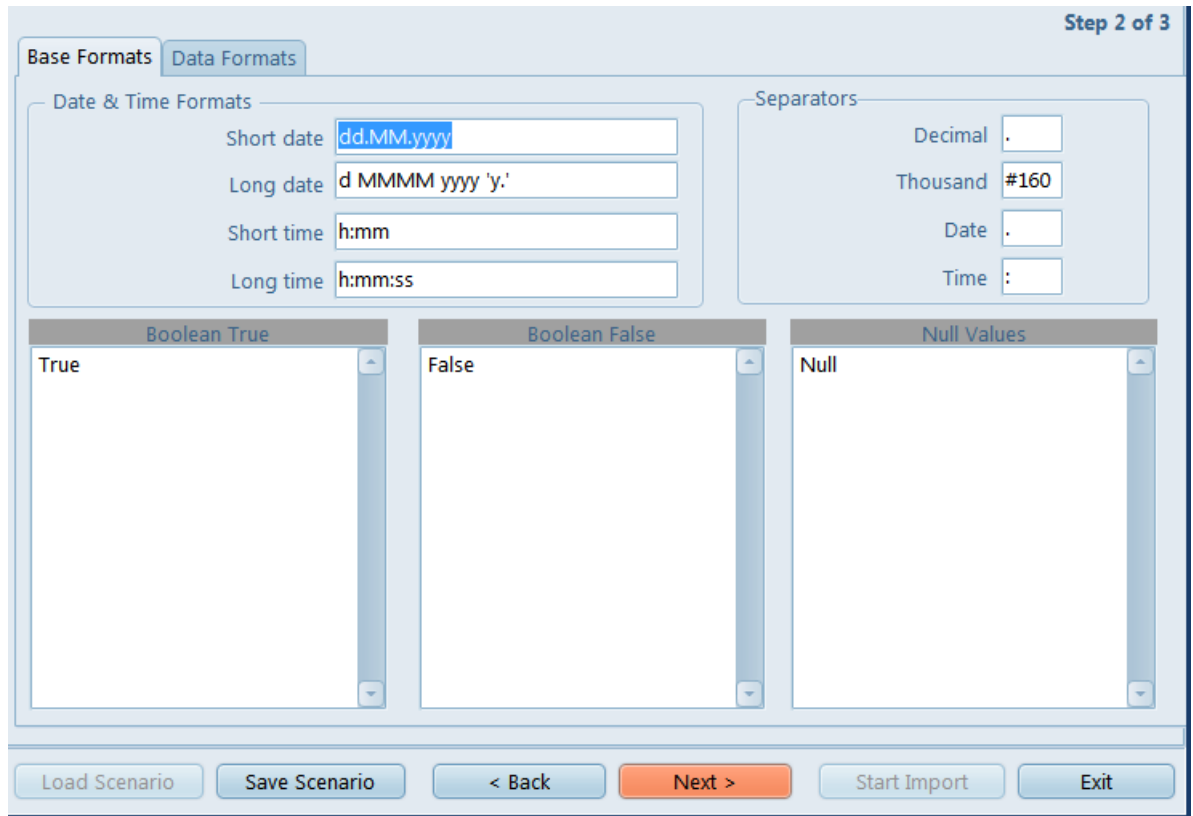
Click **Remove** or **Clear** to cancel a particular link or all links, respectively.

3. Formatting and Import Options

The next step after the Range editor involves setting the options for parsing some of the formatting in the source file. These options are separated between two tabs.

3.1. 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 (by default set to #160: non-breaking space).

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 '+'. 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.

3.2. 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 Projex Import Utility should read as NULL value.

Default value – set the value which will be inserted in the database by Projex 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.

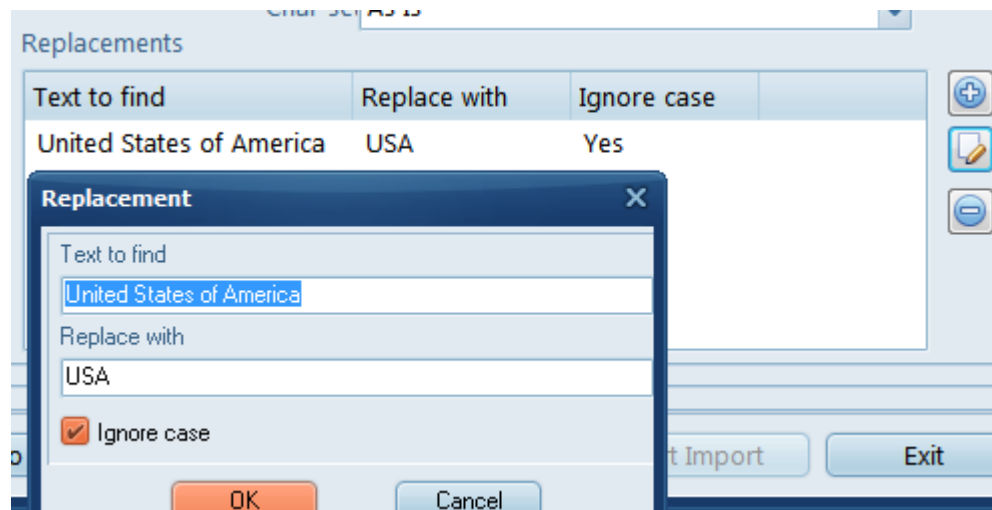
Quote action – select Add to add quotation marks to the imported string, Remove to remove all the quotation marks from the imported string, or As Is to save the original quotation marks. **As is** option saves the original string char set.

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.

Replacements

Here you can set the replacement list for the selected field.



Every time the utility finds cell in that field, with a value matching one in the list, it will be automatically replaced. The **Ignore Case** option allows you to treat strings with different capitalizations as the same string and replace them all with a single alternative string.

3.3. Import Options

Here you can select the import mode and set the extent of the import.

Four Import modes are available:

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 which already exist in the target object, others are skipped

Update or Insert - Updates existing records and inserts new records

To choose which columns to import data into, select them in the "Available/Selected Columns" lists and use the four buttons between the lists to move the columns back and forth.

When using any Import mode other than **Insert All**, you will be required to designate one or more Key Columns. If a particular record's Key Column values match those of a record already in the database, the matching record will be updated. Otherwise, the data will be placed into a new record. Choose Key columns by using the "up/down" buttons next to the "Selected Columns" list.

At the bottom of the window you can choose whether you want to import all the records in the file or only a certain number (starting from the top).

Once you are satisfied with the settings, click **Start Import**.

4. Import Scenarios

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.

NOTE: If you want to save an import scenario for later use, it is recommended to do so immediately before or immediately after performing an import.