



PlanningPME
Schedule easily

Card n°14 : Import / Export with PlanningPME

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I. Description of this feature

There are several possibility of Import and Export with PlanningPME :

. Chapter II : Some **import and export under ".txt" files** are included in PlanningPME. Here are the data you can import :

Clients : Society, concerned resources, dates and hours, comments...

Tasks : Label, concerned resources, dates and hours, comments

Unavailabilities : Label, concerned resources, dates and hours, comments

. Chapter III : Tab « Integration » to execute scripts from PlanningPME

. Chapter IV : Using the free development tools **Synchrodatabase and PlanningPMECOM**: possibility to make links between your databases and /or management softwares and PlanningPME (Chapter III)

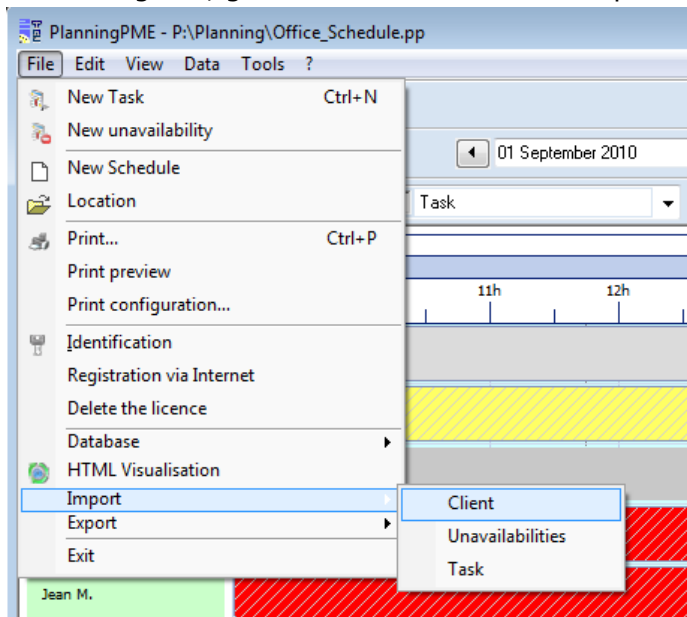
II. Import / Export text files ".txt"

II.1. Import

It is possible to import clients, tasks or unavailabilities under **text format. with tabulation as separator.**

NB : To work with Excel files, you will first have to convert your Excel file under text file.

From PlanningPME, go to the menu "File" -> "Import"

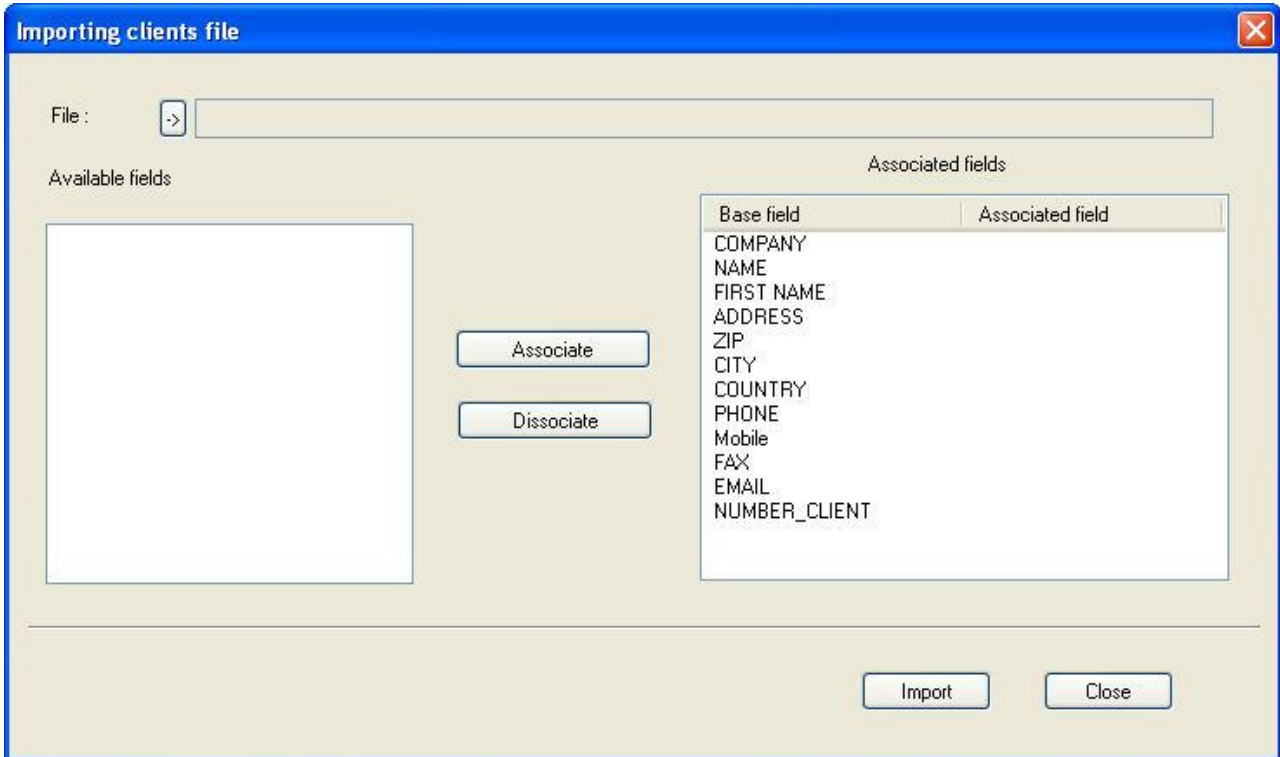


You can import the data on your clients, your tasks or your unavailabilities.

II.1.1. Clients import

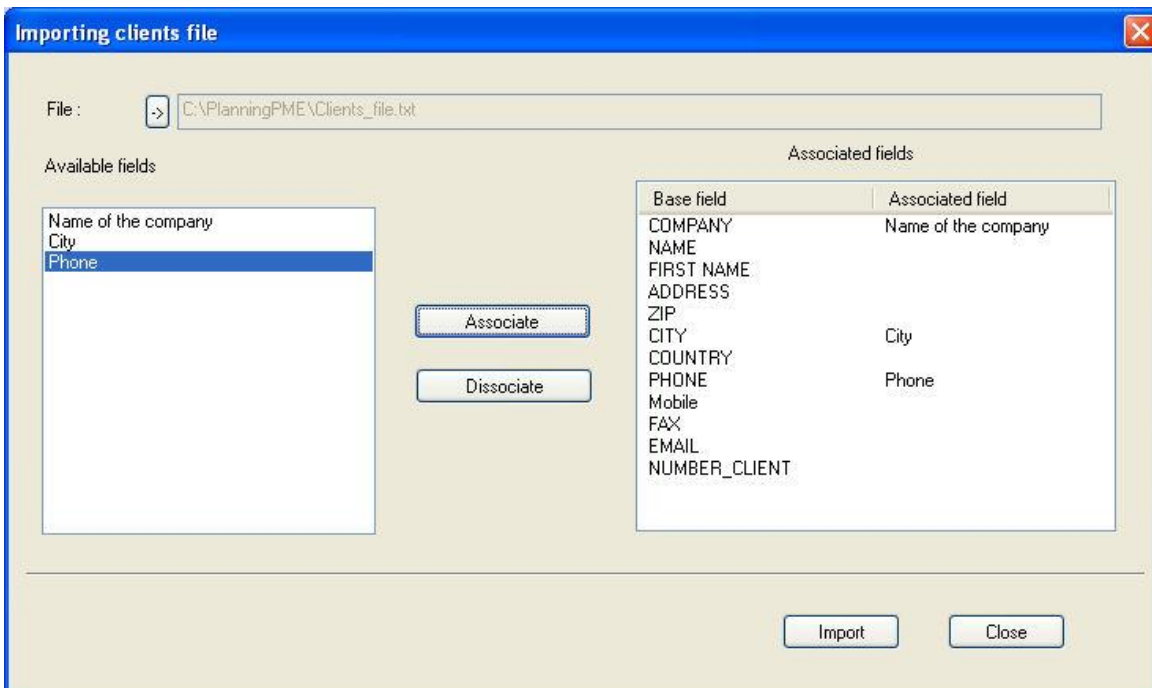
From PlanningPME, go to the menu "File" -> "Import" -> "Clients"

The following window appears.



Recover your text file clicking on the arrow of the window below.


Associate the corresponding fields selecting the available fields on the left and the base field on the right.



Then click on "Import".

Visualization of the import in PlanningPME.

Go to the menu "Data" -> "Client".



Number	Name	Type	ZIP	City	Country	Phone
	Client1	Company				
	Society A	Company		Paris		+33 140569..
	Society B	Company		London		+44 556896..
	Society C	Company		Roma		+34 452000..

Your clients were imported !

II.1.2. Tasks or unavailabilities export

The set up to import tasks or unavailabilities is more complex than for clients. Indeed, your text file must have a precise format.

The tasks will be created automatically on the schedule if your text file is correct.

Format type of the text file:



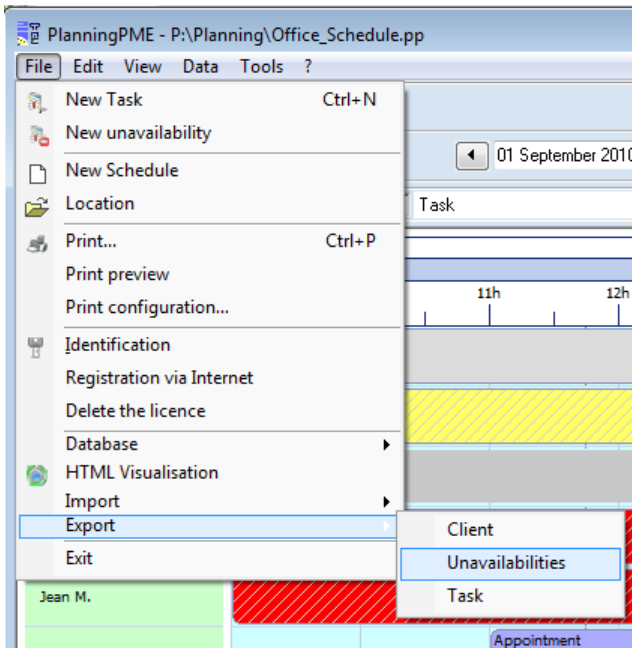
N°	Nom_tâche	Date_début	date_fin	Noms_ressources	Remarques
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For more information on this type of import, you can contact our technical team: support@planningpme.com

II.2. Export

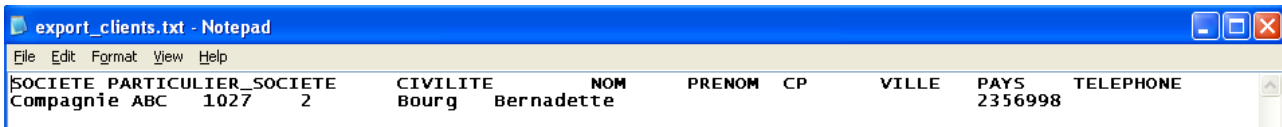
You can export your clients, tasks and unavailabilities under text files.

From PlanningPME, go to the menu "File" -> "Export".



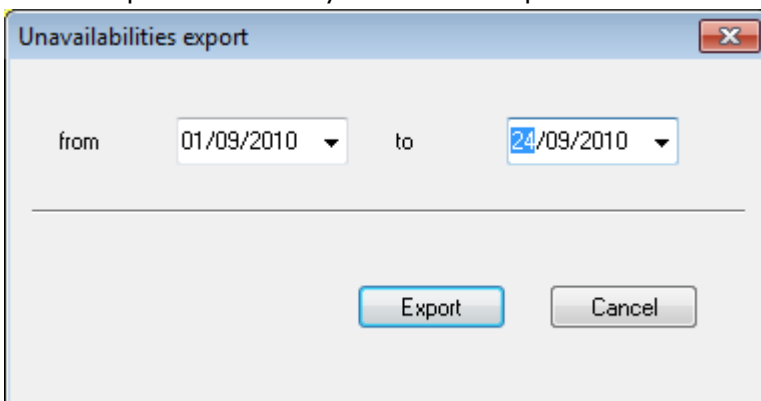
II.2.1. Clients export

Enter the name of the file exported and save.
The exported file looks like this text file:



II.2.2. Tasks or unavailabilities export

Give the period of time you want to export.



Click on "Export" and save your text file.

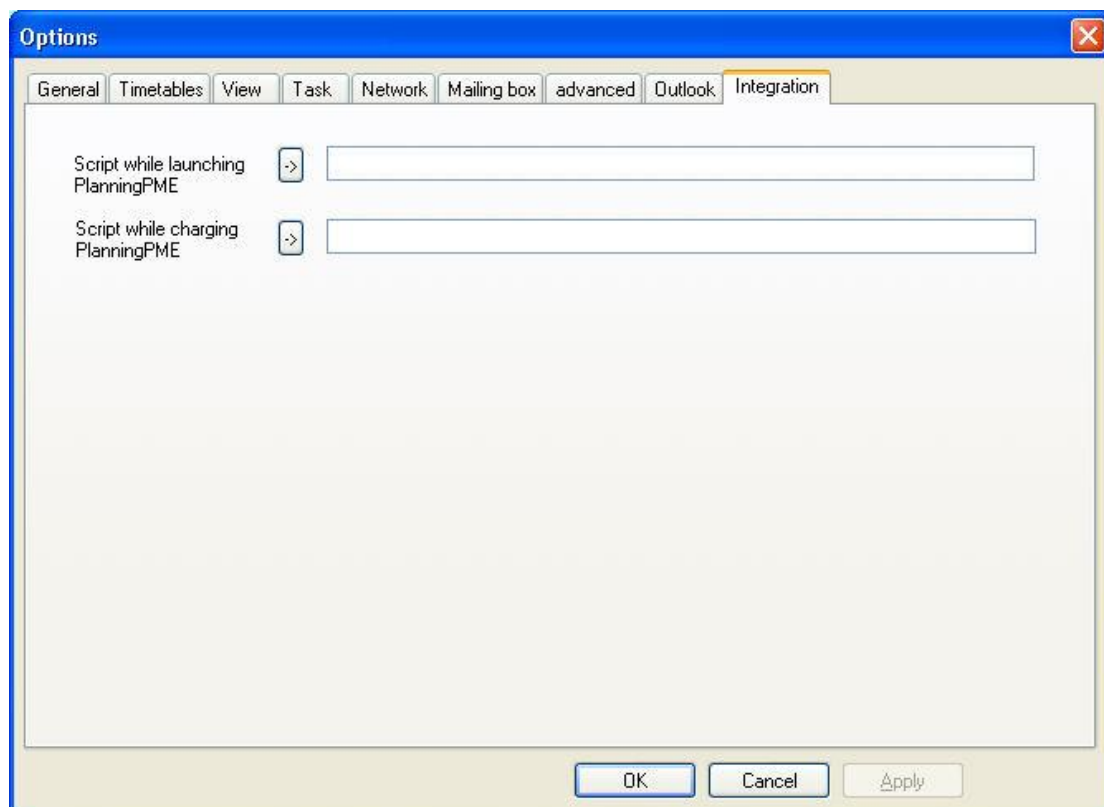
The exported file looks like this text file:



N°	Nom_tâche	Date_début	date_fin	Noms_ressources	Remarques
1	Exhibition	19/09/2005	21/09/2005	Roger	Exhibition in Barcelona
2	Exhibition	19/09/2005	21/09/2005	Ben	Exhibition in Barcelona
3	Exhibition	19/09/2005	21/09/2005	Truck	Exhibition in Barcelona
4	Maintenance	19/09/2005 10:00	19/09/2005 12:00		Laura
5	Maintenance	19/09/2005 10:00	19/09/2005 12:00		Car
6	RDV Client	19/09/2005 10:00	19/09/2005 12:00		Sarah

III. Tab "Integration" to launch scripts

From the menu Tools -> Options, you have a tab "Integration".



If you developed some scripts that you would like to execute when opening PlanningPME or when charging PlanningPME, you can specify their location from here.

NB: Each time a task is created or modified on the planning board, the software is charging.

IV. Object model PlanningPME COM

You have the possibility to make links between your databases and /or management softwares and PlanningPME.

- PlanningPME COM: <http://www.planningpme.com/object-model-planningpme.htm>

As an example, you can import your existing client database in PlanningPME and, then, you can synchronize regularly those databases. you avoid double typing !



PlanningPME COM allows you to integrate PlanningPME into your data system.

V. Plugin PlanningPME

Why a plug-in PlanningPME ?

- In order to insert controls (button) in the PlanningPME interface and associate actions.
- In order to make automatic actions for example add or update a task.

The screenshot shows a 'Task' dialog box with the following details:

- General:**
 - Label: Meeting
 - Client: (empty)
 - Resource: Only one (selected), Arnaud D.
 - Status: Not confirmed
 - Action button: My Button update Task (highlighted with a red box and arrow)
- Dates:**
 - Beginning: 15/04/2008, 10:00, Morning
 - End: 15/04/2008, 13:00, Afternoon
 - Recurrence: (checkbox)
 - All day: (checkbox)
- Break:** 00:00
- Comments:** (text area)
- Reminder:** (checkbox with bell icon)
- Buttons:** OK, Cancel, Apply

To know more about integration, you can have a look at our website:

<http://www.planningpme.com/integration.htm>

<http://www.planningpme.com>