

## Project Import Specification

This specification document is specifically for importing project data.

### Important Information

Data changes will be made to each project for all data field heading present in the CSV import file.

### General Rules

- File must be .csv.
- Column headers are required for data fields that need updating.
- Header names are space and case insensitive.
- If the file does not contain the required data fields, the whole CSV file will be rejected.
- If the file contains any extra headers not recognised, the whole CSV file will be rejected.
- If an existing project is found with the same name, the project will be updated.
- If any data field on a record has an error, the record is skipped, and processing moves onto the next record.
- The maximum number of records is 10,000 per CSV file import.
- Character limits include spaces.

| Data Field Heading  | Required | Data Type | Description  |
|---|----------|-----------|--|
| Name  | Yes      | Text      | Sets the project name.<br>Max Character Limit: 128 Characters  |
| <b>Only include additional columns where data changes are required.</b> |          |           |  |
| Reference   | No       | Text      | Sets the project reference.<br>This should be same project reference set up in the company accountancy package or payroll system.<br>Defaults to not set if left blank.<br>Max Character Limit: 128 Characters |
| Description   | No       | Text      | Sets the project description.<br>Max Character Limit: 512 Characters   |
| Active  | No       | Boolean   | Sets the active state of the project. Defaults to <b>true</b> if left blank.   |
| Applies To Mileage Expenses   | No       | Boolean   | Defaults to <b>true</b> .<br>Set to <b>true</b> to turn setting on or set to <b>false</b> to leave setting off.  |

|   |    |         |  |
|---|----|---------|--|
| Applies To Purchase Expenses  | No | Boolean | Defaults to <b>true</b> .<br>Set to <b>true</b> to turn setting on or set to <b>false</b> to leave setting off.  |
| Applies To Time Expenses  | No | Boolean | Defaults to <b>true</b> .<br>Set to <b>true</b> to turn setting on or set to <b>false</b> to leave setting off.  |
| Applies To Mileage Log Expenses   | No | Boolean | Defaults to <b>true</b> .<br>Set to <b>true</b> to turn setting on or set to <b>false</b> to leave setting off.  |
| Applies To Invoicing  | No | Boolean | Defaults to <b>true</b> .<br>Set to <b>true</b> to turn setting on or set to <b>false</b> to leave setting off.  |
| Approval Flow   | No | Boolean | Sets the approval flow for the project. Must contain the name of an existing approval flow on the account.<br>Defaults to <b>none</b> .  |
| Billable  | No | Boolean | Set to true to turn on or false to turn off.<br>Defaults to <b>false</b> if left blank.  |
| Billable Categories   | No | Text    | Only applies if Billable is set to true. Can contain the name of any existing categories on the account, pipe separated or quoted if required. If the Billable field is set to true but no categories are specified then the project is set to Billable, but if categories are specified then the project is set to Depends On Category. |
| <b>To apply new visibility settings all of four Visible To columns must be present.</b> |    |         |  |
| Visible To  | No | Text    | Sets visibility to either everyone, no one or data in department, user group or user.<br>Must contain <b>All</b> , <b>None</b> or <b>Selected</b><br>If <b>All</b> or <b>None</b> entered the below three Visible To fields must all be empty.   |
| Visible To Departments  | No | Text    | Sets visibility to specified department.<br>Must contain the name of one or more departments.  |
| Visible To User Groups  | No | Text    | Sets visibility to specified user group.<br>Must contain the name of one or more User group.   |
| Visible To Users  | No | Text    | Sets visibility to specified user.<br>Must contain one or more registered users' email address.  |

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## Custom Field Information

When importing projects, you can also populate any custom fields. To set a custom field, a column must be present in the file which matches the exact name of the custom field.

When present the system will try to parse the value from the file into the data type of the custom field e.g. for a custom field that is a list, the file must contain one of the values present in the list, or for a numeric custom field, the file must contain a valid number. An error will be raised if an incorrect value is given.

*The required flag of the custom field is also adhered to, but only if the column is present in the file.*

| Data Field Heading | Required | Data Type                               | Description  |
|--------------------|----------|---|--|
| Custom Field Name  | No       | Determined by custom field type created | Sets department custom field data.<br>A custom field is used to capture additional company specific data.<br>Max Character Limit: 128 Characters |

## Key – Data Type

**Text** = Data consisting of or using both letters, numbers and special characters.

**Boolean** = Boolean fields will be treated as true if they contain **true**, **yes** or **1**, and false if they contain **false**, **no** or **0**. These are case insensitive.

**List** = Where a field allows a list of multiple values, these must be pipe separated (|). They can also be quoted if they contain commas. E.g. Sales|Marketing|"Management, UK".