

DBLive Plugin User's Guide

General

- a. Once you have installed DBLive, in the Estimating tab of Planswift you will now have a "DBLive" button in the top tool tray in the "Database Update" group. Click the "DBLive" button to launch DBLive.

1. Creating a Database Connection

- a. Click the "Databases" button at the top to add a new database connection.
- b. In the "User Data Sources" area you will see a list of default sources that you can disregard.
- c. Click the "Add" button, select the appropriate driver for the type of database file that you are connecting to and click "Finish", then "OK". To connect to a Microsoft Excel file, choose the "Microsoft Excel Driver (*.xls, *.xlsx, *.xlsm, *.xlsb)" driver. To connect to a Microsoft Access file, choose the "Driver do Microsoft Access (*.mdb)" driver. If the appropriate driver for the database file that you want to connect to is not in the list, install an ODBC driver for your database type and then re-launch DBLive. The new driver will now be available in the list to select from. If you are unable to successfully connect to your database file, please contact us at info@tradetekplugins.com or give us a call at 828-361-5819.

2. Connect

- a. Click the "Select" button at the top and select the database connection that you just added. If you are connecting to an Excel file, be sure that the "Excel Workbook" checkbox to the right of the "DBLive Map Name" field is checked. Click the "Connect" button at the top. If the connection is successful, you should see the table / sheet names in the "Database Table" area of DBLive.

3. Create Update Maps

- a. Click on the first table / sheet name that you want to perform an update from in the "Database Table" area. In the "Search Column" area, select the column in your database file that contains the item names that will be matched to the Name property of your takeoff items in Planswift. ***The value in the Name property of the takeoff items must match the item names in the "Search Column" of the database exactly!*** In the "Data Columns" area, check each column of data that you want to import into Planswift to perform the update of the takeoff item properties then click the "New" button to the right. This will add a new update map.
- b. Perform step a above for all additional tables that you want to include in the update.

4. Save Update Map

- a. If you are going to be performing the same update multiple times, add a name for your update file in the "DBLive Map Name" area and click the "Save Map" button and then navigate to the location that you want to save the file to. The next time you need to perform the update you can simply click the "Load Map" button, navigate to that file and select it, then click the "Update" button.

5. Update

- a. Once you have added all the update maps from the appropriate tables / sheets, be sure that the job that you want to update is currently open in Planswift and then click the "Update" button at bottom right to perform the properties update in Planswift.

6. Support

- a. Please contact us if you need help with getting your database file connected or you have any other issues regarding DBLive.