



Projetex 9 HR Manager — Reference Guide

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1 Introduction

This guide covers some of the [Projetex](#) features most often used by human resources staff.

These are:

- *Freelance experts database*: creating and updating database of in-house and freelance experts.
- *Custom fields*: customizing databases with user-defined fields.
- *Application notes*: using Application Tracker and Application Notes to track progress of each translator applicant through application process.
- *General prices for freelancers*: managing database of translator rates.

For more information on other topics, like filtering data, reporting and exporting, please refer to other [Projetex](#) guides, which can be downloaded from the following web page:

<http://www.projetex.com/documentation>

2 Interface Overview

2.1 Navigation

Navigation panel is a part of [Projetex](#) user interface simplifying and quickening navigation in the program.

You can hide navigation panel to free display space by clicking left edge of the screen.

Use **Navigation** menu to switch between **Classic** and **Modern style** of navigation bar.

HR staff of translation agencies would benefit from using windows from **Corporate Team** and **Freelancers** areas of navigation panel. These areas contain the following windows:

Corporate Team group of icons



Corporate Expert window displays consolidated information about the specific in-house expert. Corporate expert data is broken down by the following tabs: **Main**, **Corporate Jobs**, **JAs**, **Files**, **Info**, **Schedule**.



Corporate Jobs window displays the list of all jobs created for in-house experts. With the help of this window you can have a quick overview of all corporate job statuses, calculate corporate job totals, edit and delete corporate jobs.



Job Assignments window displays the list of all currently issued job assignments to all corporate experts.



Corporate Expenses window can be used to make and view entries about any expenses that are not concerned with paying in-house and freelance experts.



Schedule of Corporate Expert Jobs window displays block diagram of all corporate jobs for the specified period. Schedules are grouped by corporate experts.

Freelancers group of icons



Freelance Expert window displays consolidated information about the certain freelancer. Freelance expert data is broken down by the following tabs: **Main**, **Application**, **Prices**, **Quotes**,

Freelance Jobs, POs, Payments, Balance, Files, Info, Schedule.

General prices for Freelancers window, where you can manage your general tariffs for freelance expert services: set price in chosen currency for each service.



Quotes from Freelancers icon opens window displaying detailed information on all quotes from freelancers stored in database.



Freelance Jobs window displays the list of all jobs created for freelance experts. With the help of this window you can have a quick overview of all freelance job statuses, view if the jobs have been included in purchase orders, calculate freelance job totals, edit and delete freelance jobs.



POs to Freelancers window displays all currently issued purchase orders for freelance jobs. Use this window to calculate PO totals, view and edit POs, print any of these POs.



Payments to Freelancers window lists all payments sent to all freelancers. Use this window to calculate payment totals, link payments with purchase orders, edit and delete payments.



Balances of Freelancers window displays a simplified balance sheet broken by freelancers based on purchase orders and payments to freelancers. Accounting staff can use this window to identify which accounts require attention. Can be viewed in Base Currency or Client Currencies.



Schedule of Freelance Expert Jobs window displays block diagram of all freelance expert jobs for the specified period. Schedules are grouped by corporate experts.

2.2 Basic Interface Options

Majority of data in **Projetex** is displayed in the form of various tables. Each of these tables can be customized by adding or removing columns, changing their order, sorting by name, and applying data filters.

Sorting records

To sort the rows in any table, click the column caption in the list.

If you want to sort your table by certain column, left-click the heading in the table:

Assigned	JA Code	Job Code
21.01.2005 0:00	JA-RH0002	J-RH0004
19.01.2005 0:00	JA-RH0001	J-RH0001
19.01.2005 0:00		J-RH0002
14.10.2004 0:00		J-RH0003

The order of sorting direction is shown as a triangle arrow near the column caption.

Assigned	JA Code ▲	Job Code
14.10.2004 0:00		J-RH0003
19.01.2005 0:00		J-RH0002
19.01.2005 0:00	JA-RH0001	J-RH0001
21.01.2005 0:00	JA-RH0002	J-RH0004

If you click the same column caption one more time, the order of sorting will be reversed:

Assigned	JA Code ▼	Job Code
21.01.2005 0:00	JA-RH0002	J-RH0004
19.01.2005 0:00	JA-RH0001	J-RH0001
19.01.2005 0:00		J-RH0002
14.10.2004 0:00		J-RH0003

Moving columns

To change the order of table columns:

1. Click the column caption and hold the mouse button. Black line will appear to the left of this column:

Assigned	Job Code	Job Name	JA Code ▼
1.01.2005 0:0	J-RH0004	amplitude heirarchy	JA-RH0002
3.01.2005 0:0	J-RH0001	Engine shceme ER	JA-RH0001
3.01.2005 0:0	J-RH0002	Engine shceme ER	
4.10.2004 0:0	J-RH0003	Lorem ipsum dolor s	

2. Drag your cursor, holding the mouse button, to the desired column:

Assigned	Job Code	Job Name	JA Code
1.01.2005 0:0	J-RH0004	amplitude heirarchy	JA-RH0002
3.01.2005 0:0	J-RH0001	Engine shceme ER	JA-RH0001
3.01.2005 0:0	J-RH0002	Engine shceme ER	
4.10.2004 0:0	J-RH0003	Lorem ipsum dolor s	

3. Release mouse button. The column will be moved to the desired place:

Assigned	JA Code	Job Code
4.10.2004 0:0		J-RH0003
3.01.2005 0:0		J-RH0002
3.01.2005 0:0	JA-RH0001	J-RH0001
1.01.2005 0:0	JA-RH0002	J-RH0004

Adding and removing columns

To add or remove columns in tables, right-click that table, then click **Customize Columns** command in the context menu.

Assigned	Job Code	Job Name	Service
1/21/2006	J-RH0004	amplitude heirarchy	Proofreading
1/19/2006	J-RH0001		=> Swe
10/14/2005	J-RH0003		=> Swe
1/19/2006	J-RH0002	Engine shceme ER	English => Swe

In the **Customize Columns** window select or clear check boxes next to the column names to add these columns to view or remove them.

2.3 Local Custom Filter

Local Custom Filter can be used to search specific data in large tables. In the white area of **Edit Filter** window current filter conditions are displayed.

Open button browses for previously saved filter settings.

Save button saves current settings of *Local Custom Filter* in the *Projetex Workstation* setup folder.

Add button adds another filtering condition.

Delete button deletes currently selected filter condition.

Clear button deletes all current filter conditions.

2.4 Folder Navigation in Projetex 9 Workstation

Expert Folders (Corporate and Freelance)

Corporate experts' folders are created in *Corporate* folder (*Business\Experts\Corporate*), freelancers' folders — in *Freelance* folder (*Business\Experts\Freelance*).

Primary purpose of every **Expert** folder is to serve as storage location for all files relevant to a particular expert. It can be created from **Main** and **Files** tabs of **Corporate Expert** or **Freelance Expert** window. The following subfolders are created automatically in **Expert** folder, depending on the document being saved:

In *Corporate Expert's* folder:

- JAs
- Corporate Jobs

In *Freelance Expert's* folder:

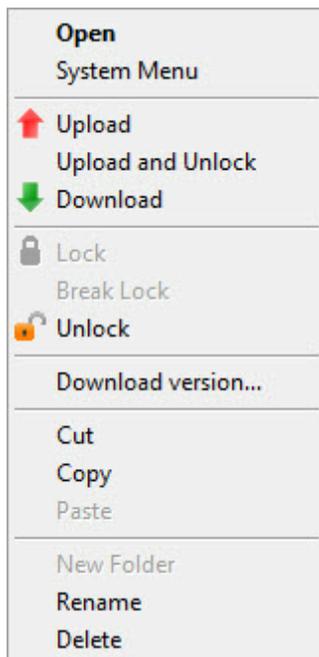
- Quotes
- Prices
- POs
- Payments

 **Note:** When a PO/JA is saved using RTF template, a resulting file is stored in a separate folder (it's name will contain PO/JA Code) and the link to this file is saved in the Pos/JAs subfolder of the expert's folder.

Each expert's folder can contain custom subfolders which will be created automatically along with an expert folder. These subfolders can be specified on the **Folders tab** of **Server Administrator Corporate Settings**.

Contextual Menu

When a user right-clicks on files or folders in **Files** tab, **Contextual Menu** is called. It has the following options:



Open - open a file using a default application.

System Menu - calls *Contextual Menu of Windows*.

Upload - upload selected files on *server*.

Upload and Unlock - upload selected files on server and unlock files which have been locked by the current user.

Download - download selected files to a *local PC*.

Lock - lock selected files.

Break Locks - unlock selected files locked by another user. It does not affect on files locked by the current user.

Unlock - unlock selected files locked by the current user.

Download versions - open **File versions** window to load a previous version of a selected file.

Cut/Copy/Paste - cut, copy or paste files and/or folders.

3 Corporate Team

3.1 Corporate Expert Window

Corporate Expert window can be used to view, edit and enter new information about your in-house (corporate) translators team, as well as to manage *corporate jobs*, *job assignments* and *files* of *corporate experts*.

To open **Corporate Expert** window click **Corporate Expert** icon from the **Corporate Team** tab of the **Navigation** panel.

Corporate Expert Window tabs

Different tabs of corporate expert window represent different data, relevant to certain corporate experts. Corporate expert data is broken by the following corporate expert window tabs:

- **Main** tab — contains the list of your corporate experts and their profiles.
- **Corporate Jobs** tab — gives an overview of corporate jobs assigned to selected corporate expert.
- **JAs** tab — is used for managing job assignments (*JAs*) for selected corporate expert.
- **Files** tab — provides quick access to selected corporate expert's folder, as well as to other files related to this expert.
- **Info** tab — this tab is used for creating various notes, related to the selected corporate expert.
- **Schedule** tab — gives a schematic overview of corporate jobs assigned to the current corporate expert.

3.2 Main Tab of Corporate Expert Window

Profiles of all the *corporate experts* in database can be viewed and managed with the help of **Main** tab of **Corporate Expert** window.

Browsing corporate experts

You can search experts by name. Select Starts with option and enter first few letters of expert's name in the field, and the cursor will jump to highlight first matching expert in the list. Select Contains option and enter any part of expert's name being searched.

- Select any expert in the list to view profile of this expert to the right.
- Once a new expert has been added, their data can be edited in this expert's profile.

Each expert can have a flag assigned to him/her. Expert flag can be changed by right-clicking the narrow field displaying flags.

Experts are listed in the form of table. Although by default this table contains single columns **Name**

and **Flag**, you can add your custom fields to the list of experts by right-clicking the expert list and then clicking Customize Columns in the context menu.

 **Note:** Only users with access to Projetex Server Administrator can add or remove custom fields.

Expert profile

Expert Code — This code is used in corporate job codes and job assignments codes of this expert. Corporate expert code can be 15 characters long maximum.

Name — corporate expert's name appears in expert chooser dialogs. This name can be maximum 150 characters long.

Contact Info — in addition to general contact details, experts photo can also be added.

Next codes — click this button to advance the automatic counters for expert-specific codes of *corporate jobs* and *job assignments*. *Projetex* will use these codes for next corporate job and job assignment you create. You can only increase the next code value.

Click **AHC** button to enter/change *Average Hourly Cost* of the selected expert. *AHC* will be used to calculate the *Total cost* of corporate jobs performed by this expert.

Expert Folder — this part of expert profile can be used to quickly create expert folder and open it in *Windows Explorer*. Corporate experts will be able to access only this folder (provided proper folder access options have been set up).

Click **Create** button to automatically create expert's folder inside *Business* folder. *Projetex* will automatically link expert's folder to appropriate expert. The location of expert folder will depend on the **location of Business folder**. **Explore** button becomes active only after expert folder has been created.

FTP Connections — you can set parameters for access to FTP folders of this expert. Shortcuts to these folders will be automatically added to **Files** tab of this expert's window.

General Information — expert profile may contain any general information, relevant to this expert in the form of a plain text note.

Custom fields of Corporate Experts

Use **Custom Fields** tab, next to the **Expert Profile** tab to access the controls for any **Custom Fields** of **Corporate Experts**, created with the help of *Projetex Server Administrator*.

3.3 Contact Information of Expert

General contact information of expert contains the following fields:

Photo — an image file can be maximum 70x70 pixels. Click **Photo** button to add a photo to contact's profile. Click **X** button to remove current photo from profile. The following formats can be used: .JPG, .JPEG, .BMP (bitmap), .GIF (Graphics Interchange Format).

E-mail (up to 2) — maximum 250 characters. **Send** button becomes active only if valid e-mail address is entered.

Phone (up to 4) and **Fax** numbers — maximum 250 characters each.

Notes — a plain text note, not limited by the number of characters.

3.4 Assign Next Expert Codes

Codes of *corporate jobs* and *job assignments* are generated automatically each time a new corporate job or job assignment is entered into database. Prefix of these codes depends on the name of the expert. The digits after represent the counter value.

Although this code cannot be edited, you can advance the counter forward by specifying a next code in **Next Codes for Corporate Expert** window.

The maximum value of the next code that can be entered in **Next Codes for Client** window is 999999. There is no technical limit to the maximum value the counter can reach.

To open **Next Codes for Corporate Expert** window, click **Next Codes** button in this expert's profile.

3.5 Expert FTP connections

FTP (File Transfer Protocol) is common method of sharing and exchanging work files. Each expert profile in *Projetex* can have a number of FTP connections (addresses of shared folders) associated with this client. These folders can then quickly be accessed by any user working with Files tab of this Client.

FTP Connection in *Projetex* can be used for quick access to specified FTP folder without having to re-type login and password each time you connect. The following details can be specified when creating connection:

Connection Name — this name has no syntax requirements and can be no longer than 50 characters.

FTP Server — address of FTP server (for example *ftp.server.com*). Can be no longer than 50 characters.

User Name — login, normally issued by FTP server administrator. This login will be used when *Projetex* attempts to connect to FTP. Can be no longer than 50 characters.

Password — This password will be used when *Projetex* attempts to connect to FTP. Password can be no longer than 108 characters long. To ensure security, once entered, a password cannot be copied to clipboard from the **Password** field.

Passive file transfer option enables passive mode for this connection. Consult *FTP server administrator* regarding the type of file transfer you should use. If you are unsure, leave **Passive file transfer** check box empty.

To add, edit or delete FTP connections of certain corporate expert, click **FTP Connections** button in this expert's profile.

3.6 Corporate Jobs Tab of Corporate Expert Window

On the **Corporate Jobs** tab you can view and edit all corporate jobs which have been assigned to a currently selected corporate expert.

Filtering corporate jobs

Use **Status** filter drop-down list to display only *completed*, *not completed*, *overdue*, etc. corporate jobs.

Use **JA Issued** filter drop-down list you can select to display only those corporate jobs which have or have not been included into job assignments to in-house experts.

Corporate Jobs statuses

Just like it is on **Corporate Jobs** tab of **Project** window, in **Corporate Expert** window corporate jobs are marked with color:

Green — the job is not completed yet, deadline in the future.

Blue — the job is not completed and due today.

Red — the job is not completed and overdue.

Black — the job is completed.

 **Note:** You can change colors on the **Colors: Status tab of the Current User Settings**.

Also, if a job has any status other than Normal, it will be highlighted either in red or in green:

Job Name	
Engine shceme ER-34221	This Job has On Hold status
Veni Vidi Vici	This Job has Planned status
Nam tempus	

 **Note:** you can change status of any job with the help of **Status** drop-down list in **Edit Job** window.

To edit the **Job** record, select it from the list and click **Edit** button, or double-click this job in the list.

3.7 JAs Tab of Corporate Expert Window

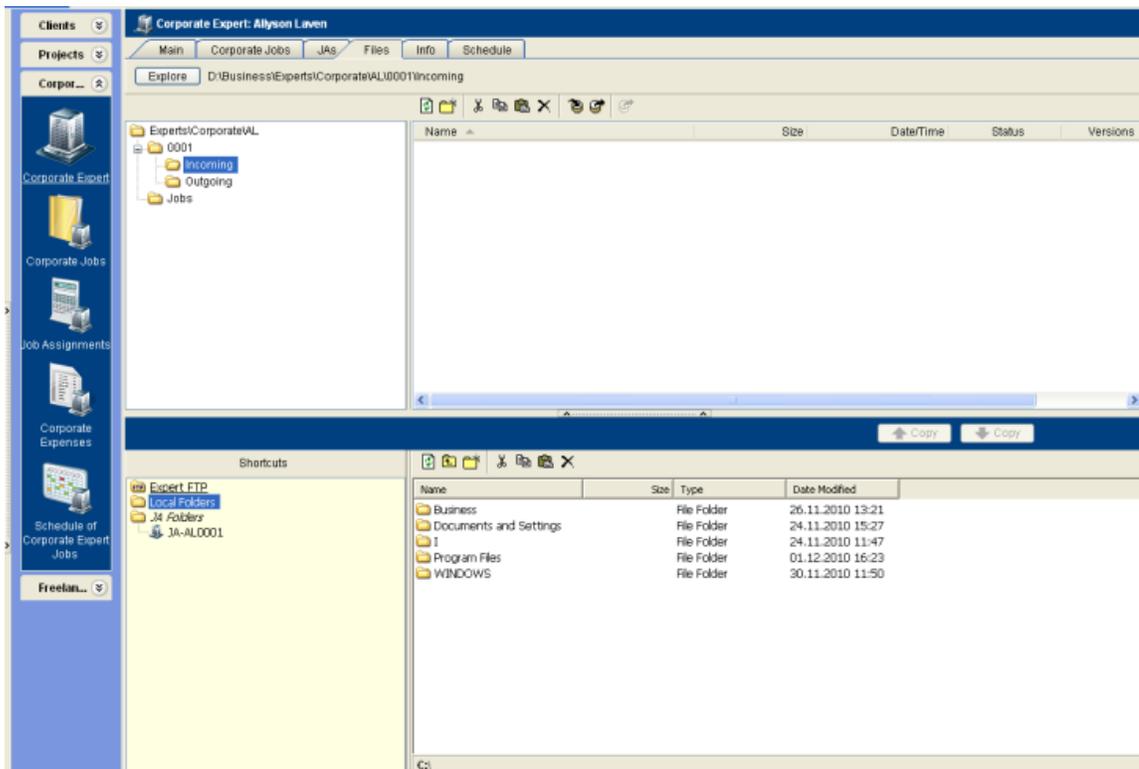
JAs tab of **Corporate Expert** window contains the list of job assignments (**JAs**), issued to currently selected corporate expert.

Click **Approved** drop-down list to filter only approved or not approved JAs.

 **Note:** **JAs** can be created and deleted on the **JAs** tab of **Project** window.

3.8 Files Tab of Corporate Expert Window

Files tab of the **Corporate Expert** window can be used to create and access expert folder of required corporate expert, and work with this expert's files. Use this tab to create, view and search for work files and folders related to the selected expert (for example, you can quickly locate and access files of certain job, assigned to this expert).

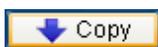


Window contains two horizontal panes. Upper pane shows the folder tree for selected expert folder and content of the currently selected subfolder. Pane underneath allows to open shortcuts. Clicking any of the **Shortcuts** options will create a second file view field to the right, and open the appropriate folder there. This allows to simultaneously work with two opened folders in the same window.

Files between expert folder and external resources (local folders, FTP) can be exchanged using **Copy** buttons.



- is used to copy file from path currently opened in Shortcuts pane to expert folder .



- is used to copy file from expert folder to path currently opened in Shortcuts pane.

Context menu contains the following specific file operations:

Open command opens the file in appropriate application

Upload command uploads the file from local *Business* folder to *BusinessServer* folder on Projetest Server Administrator PC.

Download can be used to download the file *BusinessServer* folder on Projetest Server Administrator PC to *Business* folder on Workstation PC.

Download version opens window that contains information about all versions of particular files.

Each file can have one of the following statuses:

Current - the files stored in *BusinessServer* folder on server and in local storage are identical.

Modified - local copy of file has been modified, the file on server has not been updated.

Out of date - file on server has been modified, local copy has not been updated.

Missing - file exists on server, but has not been downloaded to local PC yet (or have been deleted locally).

Not in view - file exists locally, but has not been uploaded to server yet (or have been deleted on server).

3.9 Info Tab of Corporate Expert Window

Info tab of the **Corporate Expert** window can be used to enter any optional additional information relevant to the selected corporate expert in plain text format. These notes will be available for all project managers.

Each note can have the following attributes:

Subject — can be maximum 100 characters long.

Category — to add categories of notes on the **Settings** menu, click **Current user** command and then click **Categories**.

Information — plain text note, any number of characters long.

Notes can be filtered by **Subject** or by **Category** columns.

3.10 Schedule Tab of Corporate Expert Window

This tab provides a project manager with visual representation of job processes of a certain corporate expert in a form of schedules.

Double-click any *corporate job schedule* to open this job for editing.

Settings for Schedule view

The following settings for the schedule page are available:

Selected period: - enter start and finish date of date range using calendars. Any changes made to these settings will take into effect only after clicking **Apply** button.

Column scale - changes the the scale of a schedule. **1 hour**, **8 hours**, **12 hours** and **1 day** options are allowed.

Column width drop-down menu allows to configure width of the column to **Short**, **Normal** or **Large**.

Sort by option sorts the items in the schedule either by **Job name** or **Job assigned** date.

Job schedules colors

Just like the jobs they represent, job schedule bars can have different colors, depending on the statuses of respective jobs:

Green — corporate job is *not completed* yet, but its *deadline is in the future*.

Blue — corporate job is *not completed* and *due today*.

Red — corporate job is *not completed* and *overdue* (its deadline is in the past).

Grey — corporate job is *completed*.

Filtering Schedules of Corporate Jobs

Use **Job Status filter** to display schedules of corporate jobs only with certain **Status**.

Use **Project Manager filter** to display schedules of corporate jobs which are being led only by *certain Project Managers*.

3.11 Job Assignments Window

Job Assignments window lists all *job assignments* issued to all of the *corporate experts*.

Click **Approved** drop-down list to view only JAs which were approved or not approved by project managers.

Corporate jobs can also be filtered by *Project Manager* responsible for them.

 **Note:** **JAs** can be created and deleted on the JAs tab of **Project** window.

3.12 Corporate Expenses Window

Any *expenses* other than *payments to freelancers* and *corporate jobs total cost* can be entered into database with the help of **Corporate Expenses** window. These expenses are used when calculating balance of projects.

To open the **Corporate Expenses** window click on the **Corporate Expenses** icon in the **Corporate Team** section of **Navigation** panel.

Corporate expense record contains default fields:

Date - the date when the expense was handled

Value - value of the corporate expense

Description - any additional information about the expense

Custom tab show custom fields for particular record. New custom fields can be created in **Custom Fields** section of **Corporate Settings** in Projex Server Administrator.

3.13 Schedule of Corporate Expert Jobs Window

Schedule of Corporate Expert Jobs displays schedules of all currently assigned **Corporate Jobs**. Corporate jobs schedules are grouped by corporate expert, to whom these jobs are assigned.

To open **Schedule of Corporate Expert Jobs**, click **Schedule of Corporate Expert Jobs** icon on the **Corporate Team** section of the **Navigation** panel.

Settings for Schedule view

The following settings for the schedule page are available:

Selected period: - enter start and finish date of date range using calendars. Any changes to this setting will take into effect only after clicking **Apply** button.

Column scale - changes the scale of a schedule. **1 hour**, **8 hours**, **12 hours** and **1 day** options are allowed.

Column width drop-down menu allows to configure width of the column to **Short**, **Normal** or **Large**.

Sort by option sorts the items in the schedule either by **Expert name** or **Job assigned** date.

Job schedules colors

Just like the jobs they represent, job schedule bars can have different colors, depending on the statuses of respective jobs:

Green — corporate job is not completed yet, but its deadline is in the future.

Blue — corporate job is not completed and due today.

Red — corporate job is not completed and overdue (its deadline is in the past).

Grey — corporate job is completed.

Filtering Schedules of Corporate Jobs

Use **Job Status** filter to display schedules of corporate jobs only with certain status: *vacant*, *completed*, *not completed*, *due today*, *overdue*, and so on.

Use **Project Manager** filter to display schedules of corporate jobs only led by certain *Project Managers*.

4 Freelancers

4.1 Freelancer Window

Freelancer window can be used to effectively keep track on freelancers and their activities, update and search through your freelancer database, as well as to manage *freelance jobs*, *job assignments* and *files* of freelance experts.

To open **Freelancer** window click **Freelancer** icon from the **Freelancers** tab of the **Navigation** panel.

Freelancer Window tabs

Different tabs of **Freelancer** window represent different data, relevant to certain freelancers in your database. All data of freelancers is broken by the following tabs of the **Freelancer** window:

- **Main** tab — contains the *list of your freelancers* and their *profiles*. Here new freelancers can be entered into database.
- **Application** tab — contains application information of selected freelancer, added by HR staff.
- **Prices** tab — is used to enter and check price information of currently selected freelancer. Here prices of this freelancer can be created and edited.
- **Quotes** tab — contains quotation information, received from the currently selected freelancer.
- **Freelance Jobs** tab — gives an overview of freelance jobs assigned to selected freelancer.
- **POs** tab — is used for managing purchase orders (POs) for selected freelancer.
- **Payments** tab — holds information on payments made to the currently selected freelancer.
- **Balance** tab — provides basic overview of the financial balance of selected freelancer.
- **Files** tab — provides quick access for selected freelancer's folder, as well as to other files related to this freelancer.
- **Info** tab — this tab is used for creating various notes related to the selected freelance expert.
- **Schedule** tab — gives a schematic overview of freelance jobs, presented in a form of **Schedules**.

4.2 Main Tab of Freelancer Window

Main tab of **Freelancer** window contains information of your freelance experts. You can add new freelancer records here or edit existing ones. The two primary areas of **Main** tab of the **Freelance**

Expert window are *freelancers list* and *freelancer profile*.

Browsing Freelancers

You can search freelancers by name. Select **Starts with** option and enter first few letters of freelancer's name in the field, and the cursor will jump to highlight first matching freelancer's name in the list. Select **Contains** option and enter any part of freelancer's name being searched.

To search freelancers by *price*, *service* or *completed* jobs, click **Search** button.

Click any freelancer in the list to view profile of this freelancer to the right.

Once a new freelancer has been added to database, his or her profile can be edited at any time.

Freelancers are listed in the form of table. Each freelancer can have a flag assigned to him or her. Freelancer flag can be changed by right-clicking the narrow field displaying flags. Although by default it contains **Name** and **Flag** columns, you can add your custom fields to view by right-clicking the freelancers list and then clicking **Customize Columns** in the context menu.

Freelancer profile

Profile of the currently selected freelancer can be viewed to the right.

Expert code — This code will be used in document (purchase order, quote) codes of this freelancer. Expert code will also be used as folder name of this freelancer's folder.

Name — Use this option to enter or edit the name of the currently selected freelancer. Freelancer's name can be no longer than 150 characters.

Postal Address — Enter address information of the currently selected freelancer. This information will be automatically inserted in the text of this freelancer's documents.

Contact info — Click this button to enter additional contact information on this freelancer.

Web-site — Click **Go** button to open this freelancer's web-site in your Internet browser. Web site address can be up to 120 characters long.

Payment Terms — You can set specific payment terms to each of your freelancers. Payment terms settings will determine when the purchase orders of this freelancer become *outstanding* and *overdue*.

VAT number — Regulations in some countries may require to indicate VAT codes (or numbers) in financial documents. Freelancer's VAT number, entered in freelancer's profile can be automatically displayed in this freelancer's printable documents.

Expert currency — Select currency of this particular expert. Expert's currency will be used in all documents of this freelancer. The totals of jobs will also be indicated in expert currency. General accounting data on experts will be presented in your *base currency*, according to defined *exchange rates*.

Next codes — You can advance the code counters of *freelancer quote*, *freelance job*, *purchase order*, and *payment to freelancer*.

Locale format — Adjust these settings to make all documents, printed for the selected freelancer use individual locale format, specific to this freelancer.

Expert folder — Freelancer folder contains jobs, purchase orders, payments prices and quotes information of freelancer. Projetex automatically creates, updates and maintains links between freelance experts in database and their folders. Expert code of this freelancer is used as folder name. Once the folder has been created, its location in **Business folder** is displayed in **Expert folder** field. Click **Explore** button to open this folder in your file explorer.

FTP Connections — you can set parameters for access to FTP folders of this freelancer. Shortcuts to these folders will be automatically added to **Files** tab of this expert's window.

General Information — freelancer's profile can contain any general information, relevant to this freelancer in a form of plain text note.

Custom data of Freelancer

Client database can be customized by adding custom fields. Any custom fields that have been added to clients database can be accessed by clicking **Custom** tab next to the **Client Profile** tab.

 **Note:** Only users with access to Projetex **Server Administrator** can add or remove custom fields.

4.3 Postal address of freelancer

Postal address of freelancer determines this freelancer's country of residence, and is automatically added to purchase orders, as well as to quotes of this freelancer. The following postal address data can be added:

Street Address — two separate addresses, can be added. Each address entry can be 50 characters maximum. When editing invoice and quote templates you can choose which of the two addresses invoice or quote should contain.

City — can be maximum 40 characters long.

State — maximum 40 characters long.

Country — you can add additional countries to the list of countries in the **Edit Postal Address** window. See Countries topic for details.

ZIP Code — maximum 10 characters long.

4.4 General Contact Information of freelancer

E-mail (up to 2) — maximum 250 characters. **Send** button becomes active only if valid e-mail address is entered.

Phone (up to 4) and **Fax** numbers — maximum 250 characters each.

Notes — a plain text note, not limited by the number of characters.

4.5 Payment Terms of Freelancer

According to the payment terms of a freelancer, *Projetex* will keep track of unpaid POs and update status of outstanding purchase orders, making them overdue, due today, due tomorrow, and so on.

With the help of **Edit Payment Terms** dialog you can configure payment conditions of selected freelancer, including:

Minimum Fee — this is the minimum sum the POs must accumulate, before they can be paid. Type 0 in this field to disable **Minimum Fee** condition.

You can also indicate if PO should be paid within certain time (30, 45, 60, or 90 days) from the day it was sent (*PO issue date*) or on certain day of certain month.

Select **Unknown/Other** to disable automatic payment terms control.

Additional Notes — a plain text note, not limited by the number of characters.

4.6 Locale Format of Freelancer

Freelancers from different countries are very likely to have different locale formats. There is no need to change your own locale format each time you print purchase order for a freelancer, with locale format differs from yours.

To print purchase orders to freelancers according to their own *Regional and Language options* (defined in *Windows Control Panel*), *Projetex* can use separate locale format for each of your freelancers.

The following locale settings can be configured:

Negative Currency Format — these settings determine how negative amounts of money are displayed. For example, in some countries negative amount is indicated with a "minus" symbol put before number: -100.00. In other countries negative amount must be written in brackets: (100.00).

Decimal Symbol — this is the character which separates decimals. You can type the required character directly into the drop-down list. Any character you type will be added to the list for later use.

No. of digits after Decimal — *Projetex* will round up all numbers in the documents to a number of decimals specified here. Set this parameter to 0 if the currency of a freelancer does not have decimal units.

Digit Grouping Symbol — this is the symbol which will be inserted between each three digits in the number, for example in the following number *1 000 000* digit grouping symbol is space.

Date Separator — enter character to delimit day, month and year in date when it is displayed in short format. For example in the following date *3,31,2008* the date separator character is comma. Settings in **Date Separator** field will be automatically applied to **Short Date Format** field.

Short Date Format — this is format for the short date display (like *3,31,2008*). Enter required date format into this field or select one of the available formats using drop-down list. Use *d* to indicate day, *m* – for month, and *y* – for year. For example *dd.mm.yy* will result in date like *01.02.09*. Date

separator characters can be entered manually in this field too. Otherwise — settings from **Date Separator** field will be applied.

Long Date Format — these settings configure the display long date (like *Monday, March 31, 2008*). Use four *d* character to map day of the week full name, four *m* characters — to map full month name, and *y* to map complete year.

 **Note:** To map brief day or month ("*Mon*" instead of "*Monday*" or "*Mar*" instead of "*March*") enter 3 d or 3 m characters instead of four.

 **Note:** Full day or month names can be displayed in short date format by typing 3 or 4 characters in **Short Date Format** field.

To configure locale settings for certain freelancer, click **Locale Format** button in this freelancer's profile and choose **Custom Values** from **Generation of RTF files** drop-down list.

4.7 Next Codes of Freelancer

Codes of *freelancer quotes*, *freelance jobs*, *purchase orders* and *payments* are generated automatically each time a new quote, freelance job, payment or PO is entered into database. Prefix of these codes depends on freelancer's name. The digits after — represent the counter code.

Although this code cannot be edited, you can advance the counter forward by specifying next code in the **Next Codes for Freelancer** window.

The maximum value of the next code that can be entered in **Next Codes for Freelancer** window is 999999. There is no technical limit to the maximum value the counter can reach.

To open **Next Codes for Freelancer** window click **Next Codes** button in this freelancer's profile.

4.8 Application Tab of Freelancer Window

Application tab of the **Freelancer** window can be used to enter recruiting information of this freelancer, employment history and other HR data. Project managers can also check this tab to view any additional information on freelancer before assigning him or her to a freelance job.

Click **Application Notes** button to enter general notes about this freelancer's application.

Application Tracker can be used to enter records about certain events (i.e. interviews, and so on.) which occurred on certain date. Application tracker can contain any number of records, each having a **Date**, **Subject** (250 characters maximum) and **Description** (plain text note with no length limitation). **Date** and **Subject** fields of a record cannot be empty.

Records in application tracker can be sorted by **Date** or by **Subject**.

4.9 Prices Tab of Freelancer Window

Each freelancer in *Projetex* can have a set of prices individual to this particular freelancer. These prices can be assigned on the **Prices** tab of **Freelancer** window. Individual freelancer price list is maintained in *freelancer's currency*. Only one price per group of services, service and unit combination can exist in individual price-list.

You can print freelancer's price list or save it in a text file by selecting the template and clicking **Save**, **Save & Open** or **Print** buttons at the bottom of **Prices** tab of **Freelancer** window.

To configure price list templates on the **Settings** menu click **Corporate** command, then click **Templates**. Templates for prices are stored in *D:\BusinessServer\Templates\EXPERTS\FREELANCE\Prices* folder.

Prices can be quickly copied from general price-list to individual price-list with the help of **Copy from General** button.

4.10 Quotes Tab of Freelancer Window

Quotes tab of **Freelancer** window can be used to account quotes of this freelancer. To view the list of freelancer's quotes, open **Freelancer** window and switch to **Quotes** tab.

Freelancer Quote Buttons

Quote management buttons are located on the left side of **Quotes** tab of **Freelancer** window.

New Quote button opens **New Freelance Quote** window, where details of a new freelancer quote can be added.

Edit button opens **Edit Freelancer Quote** window, where details of currently selected quote can be edited.

Delete button deletes currently selected quote.

Quote Filters

Status drop-down list can be used to display only the quotes with a certain status.

Freelancer Quote Status

A quote can have one of the following statuses: **Unknown**, **Accepted** and **Rejected**. Depending on its current status, the quote will be marked with different color in the quotes list:

Blue — for unknown quote status.

Green — for accepted quote status.

Red — for rejected quote status.

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

4.11 Freelance Jobs Tab of Freelancer Window

Freelance Jobs tab displays all jobs of the currently selected freelancer. New jobs cannot be created from this tab, however, existing ones can be edited.

Filtering Freelance Jobs

Using **Status** drop-down list you can choose to filter only jobs with a particular status, like *vacant*, *not completed*, *due today* and so on.

Using **PO Issued** drop-down list you can set **Projetex** to display only jobs for which purchase order has been or has not been issued, or free jobs.

Freelance Jobs statuses

Freelance jobs are displayed in different colors, depending on their completion statuses:

Black — the freelance job is *completed*.

Green — the freelance job is *not completed* yet, *deadline in the future*.

Blue — the freelance job is *not completed* and *due today*.

Red — the freelance job is *not completed* and *overdue*.

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

Also, if a job has any status other than normal, it will be highlighted either in red or in green:

Job Name	
Engine scheme ER-34221	This Job has On Hold status
Veni Vidi Vici	This Job has Planned status
Nam tempus	

 **Note:** You can change status of any job with the help of **Status** drop-down list in **Edit Job** window.

4.12 POs Tab of Freelancer Window

Use **Purchase Orders** tab to view purchase orders issued to currently selected freelancer. New purchase orders cannot be created from this tab, however, existing ones can be edited.

PO Statuses

Purchase order statuses change depending on your payment terms to freelancers and your payment to freelancers linked to purchase orders.

Green — purchase order is *outstanding* and is expected *to be paid soon*.

Blue — purchase order is *outstanding* and is expected *to be paid today*.

Red — purchase order is *outstanding* and its *payment is overdue*.

Black — purchase order has been *settled* (paid).

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

Projetex automatically assigns statuses to POs depending on each freelancer's payment terms.

Filtering POs

Use **Status** drop-down list to filter out only those **Purchase Orders** which have selected status.

Use **Approved** drop-down list to filter out those **POs** which have or have not been approved by project managers.

 **Note:** **POs** can be created and deleted in **POs** tab of **Project** window.

4.13 Payments Tab of Freelancer Window

Payments tab of the **Freelancer** window displays records of payments to currently selected freelancer.

Payments to freelancers can be linked to purchase orders, fully or partially. If the sum of linked payment values, matches *PO total*, this purchase order is considered "settled". Payments are also added to company expenses on **Balance** tabs.

By default payments values are displayed in freelancer currency. Right-click the table and click **Customize columns** option to configure which payment data must be displayed.

Payment Filter

Use **Status** drop-down list to display only payments which are still to be linked with POs, or only those, which whole amounts have been linked with POs.

4.14 Balance Tab of Freelancer Window

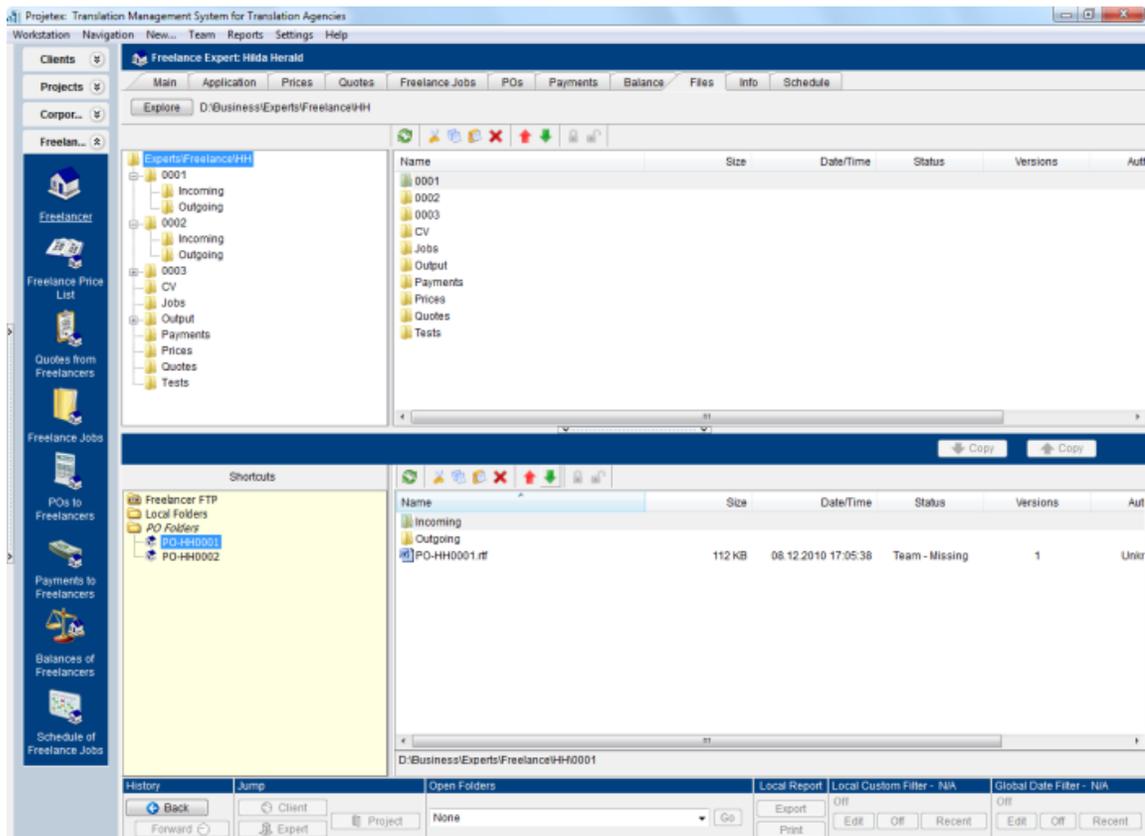
Balance tab of the **Freelancer** window displays a brief summary of selected freelancer's accounts.

This balance includes *total of purchase orders*, issued to this freelancer, *total of payments*, paid to this freelancer, and *account balance* (total POs minus total payments).

Pie diagram represents the share of this freelancer in overall purchase orders issued to all freelancers.

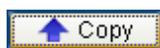
4.15 Files Tab of Freelancer Window

Files tab of the **Freelance Expert** window can be used to create an expert folder with one click, create, view and search for files and folders related to this expert. This tab can also be used to access remote FTP folders.



Window contains two horizontal panes. Upper pane shows the folder tree for selected freelancer's folder and content of the currently selected subfolder. Pane underneath allows to open shortcuts. Clicking any of the **Shortcuts** will create a second file view field to the right, and open appropriate folder there. This allows to simultaneously work with two opened folders in the same window.

Files between freelancer folder and external resources (local folders, FTP) can be exchanged through **Copy** buttons.



- is used to copy file from path currently opened in Shortcuts pane to freelancer folder .



- is used to copy file from freelancer folder to path currently opened in Shortcuts pane.

Context menu contains the following specific file operations:

Open command opens the file in the appropriate application

Upload command uploads the file from local *Business* folder to *BusinessServer* folder on Projetex Server Administrator PC.

Download can be used to download the file *BusinessServer* folder on Projetex Server Administrator PC to *Business* folder on Workstation PC.

Download version opens window that contains information about all versions of particular files.

Each file can have one of the following statuses:

Current - the files stored in *BusinessServer* folder on server and in local storage are identical.

Modified - local copy of the file has been modified, the file on server has not been updated.

Out of date - file on the server has been modified, local copy has not been updated.

Missing - file exists on the server, but has not been downloaded to local PC yet (or have been deleted locally).

Not in view - file exists locally, but has not been uploaded to server yet (or have been deleted on server).

4.16 Info Tab of Freelancer Window

Info tab of the **Freelancer** window can be used to enter any additional information regarding the selected freelance expert in plain text format. These notes will be available for all project managers.

Each note has the following attributes:

Subject — can be maximum 100 characters long.

Category — to add more categories of notes on the **Settings** menu click **Current user** command, then click **Categories**.

Information — plain text note, any number of characters long.

Notes can be filtered by **Subject** or by **Category** columns.

4.17 Schedule Tab of Freelancer Window

Schedule tab of the **Freelancer** window displays schedules of this expert's *freelance jobs*.

Double-click any schedule representing the freelance job to open this job for editing.

Settings for Schedule view

The following settings for the schedule page are available:

Selected period: - enter start and finish date of date range using calendars. Any changes to this setting will take into effect only after clicking **Apply** button.

Column scale - changes the scale of a schedule. **1 hour**, **8 hours**, **12 hours** and **1 day** options are allowed.

Column width drop-down menu allows to configure the width of columns to **Short**, **Normal** or **Large**.

Sort by option sorts the items in the schedule either by **Job name** or **Job assigned** date.

Job schedules colors

Just like the jobs they represent, job schedule bars can have different colors, depending on the statuses of respective jobs:

Green — freelance job is *not completed* yet, but its *deadline is in the future*.

Blue — freelance job is *not completed* and *due today*.

Red — freelance job is *not completed* and *overdue* (its deadline is in the past).

Grey — freelance job is *completed*.

 **Note:** To customize status colors on the **Settings** menu select **Current User** section. Click **Colors: Statuses** section of **User Settings** window.

Filtering Schedules of Corporate Jobs

Use **Job Status** filter to display schedules of freelance jobs only with certain status, such as *vacant* (no expert assigned), *overdue*, *completed* and so on.

Use **Project Manager** filter to display schedules of freelance jobs only led by certain project managers.

4.18 Freelance Price List

Freelance Price List window contains your general *price list* for services offered by your freelancers. These prices can be used when creating freelance quotes, freelance jobs and *POs* for any freelancer in your database.

Prices from this window can be copied to any individual freelancer price list.

You can *print* your general freelance services price list or save it in a text file by selecting the template and clicking **Save**, **Save & Open** or **Print** buttons at the bottom of the window.

To configure price list templates on the **Settings** menu click **Corporate** command, then click **Templates** section. Templates for prices are stored in *D:*
\BusinessServer\Templates\EXPERTS\FREELANCE\Prices folder.

4.19 Quotes from Freelancers Window

Quotes from Freelancers window provides an overview of all freelancer quotes. The options available for this window are the same as those for **Quotes** tab of **Freelancer** window. The major differences are:

- **Quotes from Freelancers** window displays all quotes from freelancers.
- New quote from freelancer cannot be created using this window.
- Existing quotes from freelancers cannot be deleted using this window.

Quote Filters

Status filter drop-down list can be used to display only quotes with a certain status.

A quote can have one of the following statuses — *unknown*, *accepted* and *rejected*. Depending on its current status, the quote will be marked with different color in the quotes list:

Blue — for unknown quote status.

Green — for accepted quote status.

Red — for rejected quote status.

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

4.20 Freelance Jobs Window

All freelance jobs stored in the database are listed in the **Freelance Jobs** window. The options available for this window are the same as those for **Freelance Jobs** tab of **Project** window. The major differences are:

- **Freelance Jobs** window displays all freelance jobs of all projects.
- New freelance jobs cannot be created using this window.
- Existing freelance jobs cannot be deleted using this window.

Freelance Jobs Filters

Using **Status** drop-down list you can select to view only jobs with a particular status: *vacant*, *not completed*, *due today* and so on.

Using **PO Issued** drop-down list you can select to view only jobs for which purchase order was issued or these, for which was not issued, or free jobs.

Freelance jobs may also be filtered by *Project Manager* responsible for them.

Freelance Jobs statuses

Color of freelance jobs in the list is determined by their status. By default these are:

Green — freelance job is *not completed* yet, *deadline in the future*.

Blue — freelance job is *not completed* and *due today*.

Red — freelance job is *not completed* and *overdue*.

Black — freelance job is *completed*.

 **Note:** You can change colors on **Colors: Status** tab of the **Current User Settings**.

Also, if a job has any status other than Normal, it will be highlighted either in red or in green:

Job Name	
Engine shceme ER-34221	This Job has On Hold status
Veni Vidi Vici	This Job has Planned status
Nam tempus	

 **Note:** You can change status of any job with the help of **Optional Status** drop-down list in **Edit Job** window.

4.21 POs to Freelancers Window

POs to Freelancers window provides a general list of all purchase orders issued to all freelancers in the database. Use this window to identify currently unpaid POs, obtain a total of balance due according to all purchase orders issued, as well as to quickly issue a large amount of POs.

The options available for this window are the same as those for **POs** tab of **Freelancer** window. The major differences are:

- **POs to Freelancers** window displays all POs for all freelancers.
- New POs cannot be created using this window.
- Existing POs cannot be deleted using this window.

To create a new purchase order, open **Main** tab of **Projects** window, select required project, and click **POs** tab.

To quickly create a large number of purchase orders, click **Mass POs** button.

PO Statuses

Purchase order statuses change depending on your payment terms to freelancers and your payment to freelancers linked to purchase orders.

Green — purchase order is *outstanding* and is expected *to be paid soon*.

Blue — purchase order is *outstanding* and is expected *to be paid today*.

Red — purchase order is *outstanding* and its *payment is overdue*.

Black — purchase order has been *settled* (paid).

 **Note:** You can change colors on the **Colors: Status tab** of the **Current User Settings**.

Projetex automatically assigns statuses to POs depending on each freelancer's payment terms.

Filtering POs

Use **Status** drop-down list to filter out only those **Purchase Orders** which have selected status.

Use **Approved** drop-down list to filter out those **POs** which have or have not been approved by project managers.

POs can also be filtered by *Project Manager* responsible for them.

4.22 Payments to Freelancers Window

Payments to Freelancers window displays all *payments* received from all *freelancers*. This window can be used to edit payments, create **Mass payments to freelancers** and calculate totals of all *Payments to Freelancers* in base currency.

Use **Status** filter drop-down list to display only payments with a particular status. Use this filter to view either the payments which are still to be linked with invoices, or only those, which whole amounts have been linked to *purchase orders*.

4.23 Balances of Freelancers Window

Balance of Freelancers window presents a simplified balance sheet of your freelancers based on your payments made to freelancers and freelancer purchase orders. Accounting staff can use this window to identify freelancer's account which require attention.

Accounts can be viewed both in freelancers' currencies and your base currency: use **View** drop-down list to select a currency in which records should be displayed.

Alternatively you can right-click the table and use **Customize columns** option to add freelancer currency columns to view.

 **Note:** To view global balance, select **Base Currency** option in **View** drop-down list.

4.24 Schedule of Freelance Jobs Window

Schedule of Freelance Jobs window displays job schedules of all the freelancers in the database. This particular schedule can be used to get the picture of all freelance jobs for the specified period. At a glance you see what jobs need immediate attention.

To open **Schedule of Freelance Jobs** window click **Schedule of Freelance Jobs** icon in the **Freelancers** section of **Navigation Panel**.

Settings for Schedule view

The following settings for the schedule page are available:

Selected period: - enter start and finish date of date range using calendars. Any changes made to these settings will take into effect only after clicking **Apply** button.

Column scale - changes a scale of the schedule. **1 hour**, **8 hours**, **12 hours** and **1 day** options are allowed.

Column width drop-down menu allows to configure a width of the column to **Short**, **Normal** or **Large**.

Sort by option sorts the items in the schedule either by **Expert name** or **Job assigned** date.

Job schedules colors

Just like the jobs they represent, job schedule bars can have different colors, depending on the statuses of respective jobs:

Green — freelance job is *not completed* yet, but its *deadline is in the future*.

Blue — freelance job is *not completed* and *due today*.

Red — freelance job is *not completed* and *overdue* (its deadline is in the past).

Grey — freelance job is *completed*.

Filtering schedules of freelance jobs

Use **Job Status** filter to display schedules of freelance jobs only with certain status,

Use **Project Manager** filter to display schedules of freelance jobs only led by certain project managers.

