



## **Corporate Expert — Reference Guide**

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## Introduction for Corporate Expert

Welcome to the **Corporate Expert** version of [Projetex](#)!

This software will help you to:

- Keep the records of all jobs done by you as a corporate expert.
- Easily see how much time is left for a particular job.
- Clearly see which jobs are done, due today and overdue.
- Navigate in the folders of your job assignments.

Corporate expert users can access only certain areas of [Projetex](#). These are:

[Corporate Jobs tab](#), which displays all jobs of the currently logged in expert. This tab can be used to obtain information about any for the currently assigned jobs. See [Corporate Jobs tab \(for Expert\)](#) for details.

[JAs tab](#), which contains the list of all job assignments, issued for this expert. Check this tab to see which of the assigned jobs require attention. See [JAs page \(for Expert\)](#) for details.

[Files tab](#), which provides secure access to expert's personal folder in Business folder. This folder contains job files, saved JAs, and other work files. See [Files tab \(for Expert\)](#) for details.

[Schedule tab](#), which shows schedules of all corporate jobs of this corporate expert. See [Schedule of corporate expert](#) for details.

## Corporate Jobs tab (for Expert)

**Corporate Jobs** tab displays all corporate jobs assigned to currently logged-in corporate expert. Double-click any of the jobs in the list to edit it.

When you finish your job, double-click it in the list, change status to **Completed**, insert the completion date and indicate the time spent on this job. To open it select the necessary job and double-click it or click **Edit** button. See [Editing Corporate Jobs \(for Expert\)](#) for details.

### Job status colors

Color of jobs in the list is determined by their completion status.

- **Black** — the job is *completed*
- **Green** — the job is *not completed* yet, deadline in the future
- **Blue** — the job is *due today*
- **Red** — the job is *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 shceme ER-34221	<b>This Job has On Hold status</b>
Veni Vidi Vici	<b>This Job has Planned status</b>
Nam tempus	

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

As any table you can find in [Projetex](#), **Corporate Jobs** list can be sorted by each column value by clicking the corresponding column caption.

Right-click the list, and select **Customize Columns** to add other columns to view. See Right click menu.

### Filtering corporate jobs list

Using **Status** drop-down list you can filter the jobs by their status, such as *completed*, *due today*, *overdue*, and so on.

You can also use **JA Issued** drop-down list to filter the jobs which are included or not included into job assignments (*JAs*).

## Editing Corporate Jobs (for Expert)

**Code** — unique code of corporate job is created automatically along with the job itself.

**Name** — this name does not need to include language pair or service name, since this data is being added separately. By default this is the name of parent client job. Corporate job name can be 100 characters long maximum. Cannot be edited by expert.

**Group** — group of services. All services in [Projetex](#) are broken down by groups. Cannot be edited by expert.

**Service** — each group of services contains a separate list of services. Cannot be changed by corporate expert.

**Volume** — job volume can be indicated in a number of units (characters, words, lines, hours and so on). Cannot be edited by expert.

**Time spent** — enter time spent on this job to have its cost automatically calculated according to your AHC.

**Timeline** — timeline of a corporate job in [Projetex](#) includes assigned, deadline dates and the date when the corporate job has been actually completed. Corporate expert can only edit the date of completion. Experts can only edit **Completed** date. Experts cannot edit **Assigned** and **Deadline** dates.

**Optional Status** — these are used when corporate job needs to be put *on hold*, or when you create *planned* (or potential) jobs. Jobs with *on hold* status have their deadlines undetermined, thus *on hold* jobs cannot become overdue. Jobs with *planned* status cannot be set as completed, since *planned* status assumes that work has not yet started.

**Instructions** — any instructions or comments of project manager regarding a corporate job can be viewed here.

**Work Notes** — corporate expert notes can be viewed here.

**Custom Fields** — corporate jobs information can be customized by adding custom fields for additional information not foreseen by default controls.

 **Note:** Only users with access to [Projetex Server Administrator](#) can add or remove custom fields. See Custom Fields topic for details.

You can save corporate job data in a printable file or print it with the help of [RTF templates](#). To make this option available click **Apply** button first to save new entry in database of corporate jobs.

Templates for printing corporate job data can be edited with the help of menu **Settings > Current User**. Click **Templates** section to quickly access all template folders. Templates for printing corporate jobs are saved in `D:\BusinessServer\Templates\EXPERTS\CORPORATEJobs` folder.

## JAs page (for Expert)

**JAs** tab of **Project** window contains the list of job assignments (*JA*). Double-click a job assignment to view it.

Use **Approved** drop-down list to view only those job assignments which have or have not been approved by project managers.

Use **Status** drop-down list to filter out only those *JAs* which have certain status (*overdue*, *due today*, *due tomorrow* and so on).

Information on this tab can be edited only by projects managers.

## Files page (for Expert)

You can explore your **Projetex** folder with the help of **Files** tab of **Projetex Workstation** window.

On **Files** tab you can browse your **Job** folders. You can also open the files in **Windows Explorer** by clicking **Explore** button.

**Files** tab 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 use shortcuts.

Clicking any of the **Shortcuts** options 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.

**Expert FTP** — access to *FTP browser* and connect to your expert FTP folders.

**Shortcuts** — browse folders on your PC

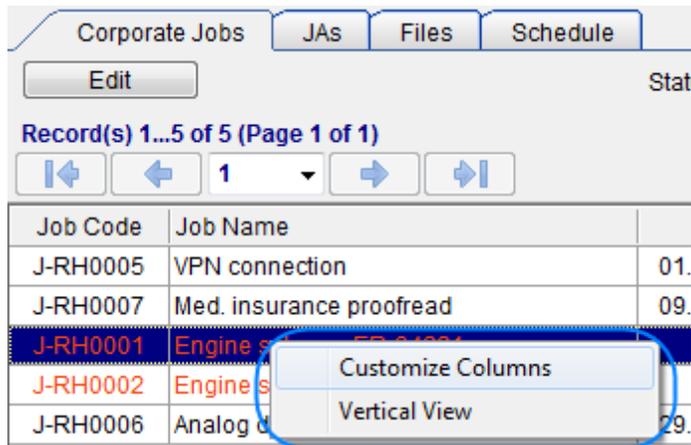
**JA folders** — quickly open any of your folders with job assignments.

## Customization (for Expert)

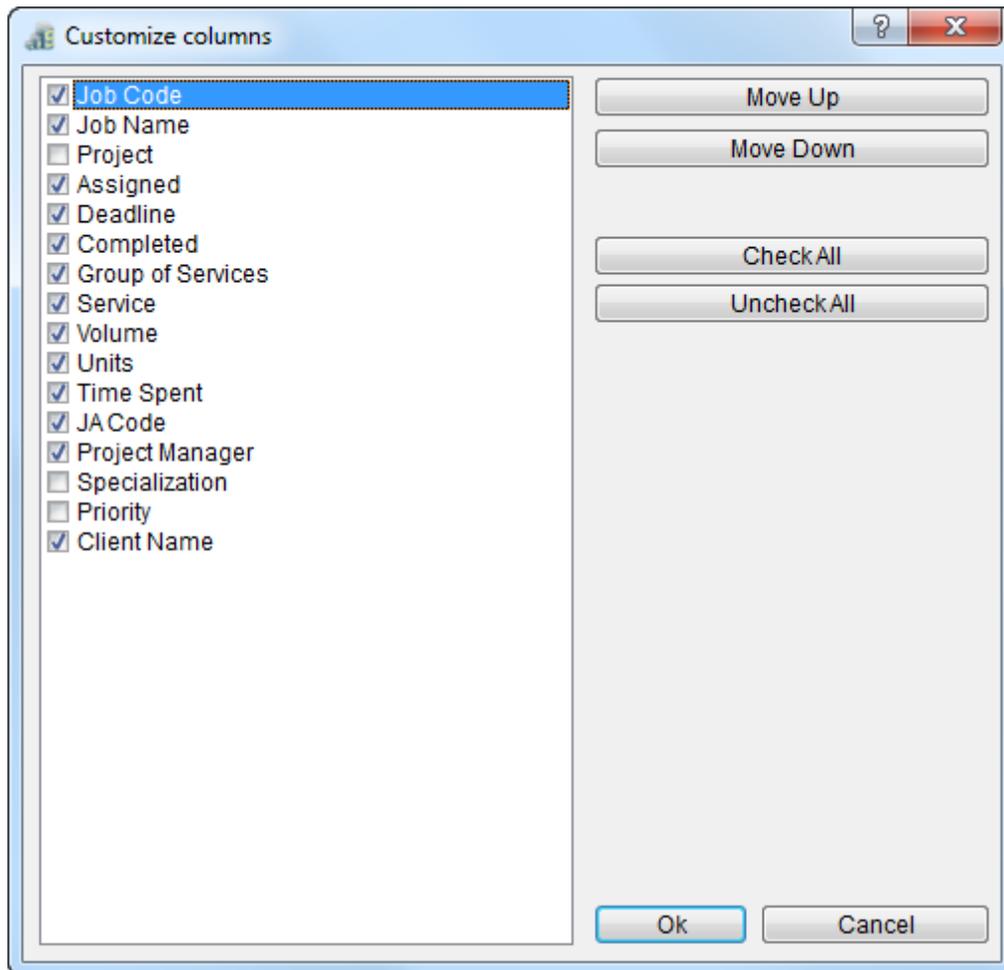
### Hiding and displaying columns

Tables displayed on **Corporate Jobs** and **JAs** tabs can be configured by adding or hiding columns. you may easily hide the unnecessary information:

1. Right-click the table to customize to bring up context menu.



2. Click **Customize Columns** to open **Customize Columns** window:

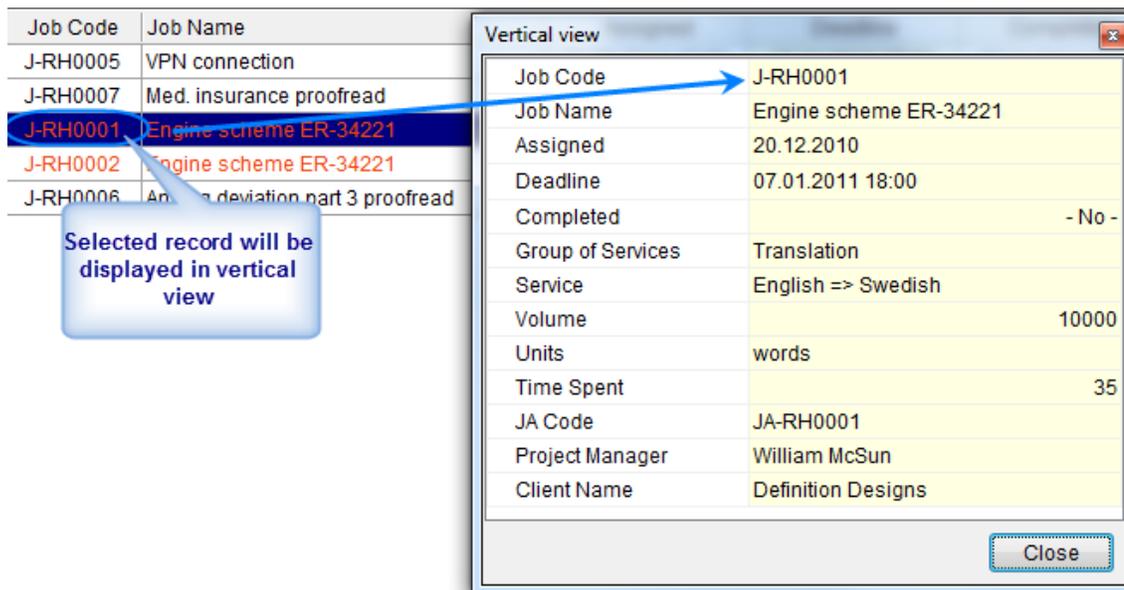


3. Select or clear check boxes next to the names of the columns to correspondingly add or remove these columns from view.

4. Press **OK** to apply the changes or **Cancel** to leave the columns unchanged.

### Vertical View

Click Vertical View to see the selected record in a vertical view in a separate window:



### Sorting records

Lines in the table can be arranged by each column (by date, by number or code, and so on). To arrange table by certain column, click the caption in this column's header.



### Moving columns

Columns order can also be changed. To do this, select the header of the column then drag and drop it, to move this column there.

For example, on the screenshot below Project column will be placed before Job Code column.

Corporate Expert: Ronald Holton

Corporate Jobs | JAs | Files | Schedule

Edit Status: \*All\*

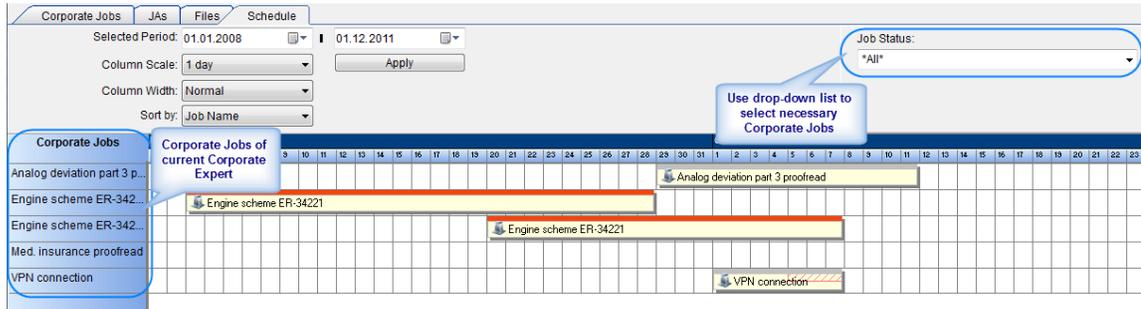
Record(s) 1...5 of 5 (Page 1 of 1)

Job Code	Job Name	Project	As
J-RH0002	Engine scheme ER-34221	Engine scheme ER-34	20.
J-RH0005	VPN connection	VPN connection trouble	01.01.:
J-RH0006	Analog deviation part 3 proofread	Analog deviation descr	29.12.:
J-RH0007	Med. insurance proofread	Medical insurance con	09.01.:

## Schedule of corporate expert

**Schedule** tab offers a schematic visual representation of your jobs in a form of schedules.

Each bar represents a process (corporate job). Double-click any corporate job schedule to open Edit Job window for this job.



### Job schedules colors

Like the corporate jobs they represent, job schedule bars can have different colors, depending on the status 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 (completed, not completed, overdue, and so on).

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

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