



Folder Automation and File Management Guide

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1 Projetex Folder Structure

The file management system of [Projetex](#) has many advantages which make it more flexible than the file management system of [Projetex 7](#):

- All users work with their local copies of files. It is safer and faster way to operate with files, especially if users connect to the server via Internet.
- Only this system allows operating via Internet.
- It provides one method for an entire team to use; everybody operates under the same 'ground rules'.
- The ability to track changes promotes accountability and makes it easier to find the right person to solve problems in the materials maintained.
- A list of exact changes made can be generated quickly and easily, making it easier to advise users of the information on how it has changed from version to version.
- It is easy to 'roll back' to an earlier version of the information, if a serious mistake was made during a change.

BusinessServer Folder

[Projetex](#) automatically creates and maintains folder structure designed to streamline storage, linking and sharing your work files.

All workflow files (such as *client-sent files* and *files to be sent to clients*, as well as saved documents like *invoices*, *job assignments*, *purchase orders* and *quotes*) are stored in respective subfolders of *BusinessServer folder*, a centralized and unified folder, accessible by each team member within necessary limits and also local Business folders on Workstation computers.

The main purpose of *BusinessServer folder* is to be a centralized storage location for client folders, project folders, and expert folders (these folders are described below). By default it is created in the root of disk *C:* of PC where [Projetex Server](#) is installed.

Location of BusinessServer folder can be changed on **Folders** tab of **Corporate Settings** window. Having changed BusinessServer folder location you must move the content from the old BusinessServer folder manually.

Different folder types

Business folder contains six folders: *Clients* folder, *Projects* folder, *Experts* folder, *Output* folder, *Templates* folder and *Versions* folder. *Experts* folder consists of two subfolders: *Corporate* and *Freelance*. *Corporate* folder stores corporate experts files; *Freelance* folder — for freelance experts files.

Clients folders (a separate folder for each client) are stored in *Business\Clients* folder. Each folder is named by unique Client Code.

Experts folders (a separate folder is created for each expert) are stored in *Business\Experts\Corporate* and *Business\Experts\Freelance* folders.

Project folders (a separate folder is created for each project) are stored in *Business\Project* folder. Each folder name contains unique *project code*. Project folder name can also contain project name and project manager name.

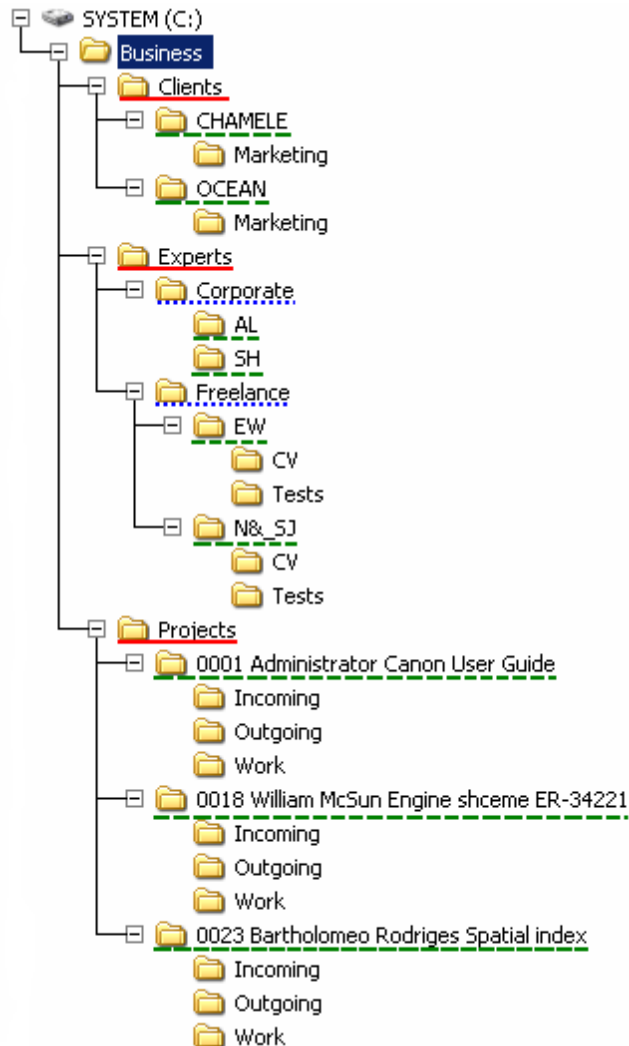
Templates folder is the storage of templates used for issuing quotes, invoices, payment etc.

Versions folder contains all versions of files, which ever have been modified on Server.

These folders, as well as their subfolders are created automatically when *Projtex Workstation* user clicks **Create** button in respective areas of the program (like **Main** tab of **Project** window). *Projtex* can also automatically create such folders when needed (for example an *Expert* folder is automatically created upon this expert's login).

Example:

Sample structure of folders in Projtex



Client Folders

Client folder is a storage location for all files relevant to a particular client. This folder is created with the help of **Main** and **Files** tabs of **Client** window. The following subfolders are created automatically in *Client* folder, depending on the document being saved:

- Prices
- Quotes
- Invoices
- Payments

Each client folder can contain custom subfolders which will be created automatically along with a client folder. These subfolders can be specified on **Folders tab** of **Server Administrator Corporate Settings**.

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**.

Project Folders

Primary purpose of every *Project* folder is to serve as a storage location for all files relevant to a particular **Project**. It can be created from **Main** and **Files** tabs of **Client** window. It is created automatically when any project-related document is saved. Project's folder always contains at least three subfolders:

- *Incoming* (where you can store the files sent you by a client)
- *Work* (where you can store files while working on them)
- *Outgoing* (where you can put files ready to be sent to a client)

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

All client jobs are stored in projects' folders, not in clients' folders, because project may contain single client job or multiple client jobs to be completed.

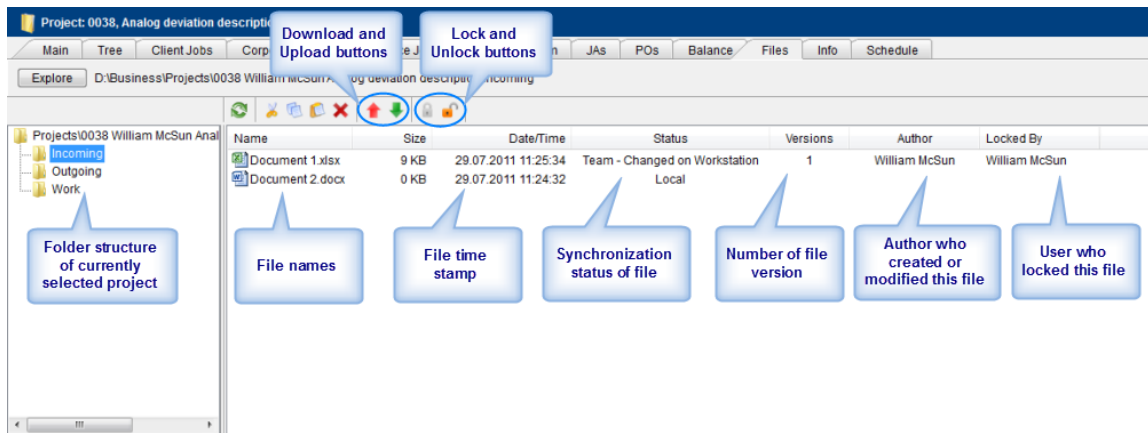
For consistency purposes, name of the project's folder is the same as project code (the default value) and cannot be modified manually. Name of the project folder can include not only unique project code.

All documents generated by **Projetex** (invoices, quotes, POs, etc.) will be uploaded on server automatically after generating.

2 File Sharing and Synchronization

Projetex uses own file sharing and synchronization system, which does not require configuring of any additional folder sharing settings on your server PC. All files stored in *BusinessServer* folder can be downloaded, updated, uploaded in *Projetex Workstation*.

Projetex Workstation automatically creates local copies of files and folders stored in *BusinessServer* folder on *Projetex Server* PC. All these files and folders are contained in *Business* folder on Workstation PC.



Note: All users running *Projetex Workstation* on the same PC have one common local repository folder and work with the same local files.

File statuses and operations with files

When a user opens such a file, he or she in fact opens a downloaded copy of a file stored in *Business* folder. To update this file on server, user will need to upload this file to *Projetex Server* PC by right-clicking the file and then clicking **Upload** on the drop-down context menu.

Each file or folder can have one of the following statuses:

Team - the files stored in *Business* folder on server and in local storage are identical.

Team - Changed on Workstation - local copy of file has been modified, the file on server has not been updated.

Team - Changed on Server - file on server has been modified, local copy has not been updated.

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


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

Locking files

When a file exists both locally and on server (i.e. it has status **Team**, **Team - Changed on Workstation**, **Team - Changed on Server** or **Team - Missing**), it can be locked using **Lock** button. In this case only a user, who locked the file, will be able to change it on server. Other users will be able to *download* the locked file but *upload* option will be denied for them. Thus the user who are working with this file can be sure that the file will not be replaced on server by other users.

In the case when file was locked accidentally by some user but another user should work with this file, he or she can right-click on the locked file and click **Break Lock** button. Then file will be unlocked and it can be locked by another user. **Break Lock** does not affect on files locked by the current user. Use **Unlock** button or **Clear Locks** from **Team** menu to unlock such files.

These operations can be performed on **Files** tabs of **Client**, **Project**, **Corporate Expert**, and **Freelancer** windows. The list of files these tabs display includes both local files and files existing on server, as well as files which exist both in *Business* and in *BusinessServer* folders.

 **Note:** It is advisable to lock file every time when you work with it, because in this case all users will be able to see that someone is working with the file. Thus you will not get a situation when several users work with the same file and then upload changes on server. Only your changes will be accepted by server.

 **Note:** *Projetex* will check only *locked modified* files which have not been uploaded on server.

3 Working with files in Projetex

General Client, Project and Expert Folders windows

General folder windows contain all available folders of certain type:

Client Folders — contains folders of all clients in database.

Project Folders — folders of all projects can be opened from this window.

Expert Folders of Corporate Experts — this folder is used for quick access to all Corporate Expert folders.

Expert Folders of Freelancers — use this window to quickly access the folders of all freelancers.

All the general folder windows can be opened using **Projetex** navigation bar. Click any of these icons to open appropriate folder window.

Folders are opened with Projetex built-in file manager. Interface of **Projetex** file manager is very much like interface of Windows Explorer with some additional options to enhance the management of your workflow files.

The structure of specified folder group (*Project* folders in this particular case) is displayed in the form of folder structure tree to the left. Click any of these folders to view its contents in the field to the right.

Folders of certain Clients, Projects, and Experts

Files of any particular client, project, or expert can be viewed with the help of **Files** tab, available in each **Client**, **Project** and **Expert** window in **Projetex**. File manager interface in this case has more options, like related folders and FTP access.

Create button: if the opened project does not have its folder created yet, click this button to automatically create folder of current project.

Explore button: click this button to open currently viewed folder in Windows Explorer window. Once opened, this window can be accessed with the help of **Open Folders** drop-down list.

Search button: opens common **Windows search** tool pre-set to search in currently viewed folder.

Folder address displays path to currently opened folder. It can be quickly copied to clipboard by double-clicking this string and using context menu to select **Copy** option.

Common file options buttons can be used to perform standard operations with selected files and folders.

Folder structure tree and **contents of currently selected folder** are identical to those of general folders windows.

Folder creation options in different Projetex windows

Edit windows for quotes, projects, experts, jobs and so on have option for quick folder creation — **Create** and **Explore** buttons.

Also **Edit Job** windows have files access tabs for quick access to job work files. These tabs are:

- **Project Folder** for client jobs
- **JA Folder** for corporate jobs
- **PO Folder** for freelance jobs

Each of these folder types has a number of own related folders. Use **Related Folders** drop-down list to quickly open any of them in the field to the right. The following folders can be quickly accessed from **Edit Job** windows:

New Client Job (Edit Client Job) — *Project* folder of related project. Related folders options:

- **FTP client**
- **JA folders** of corporate jobs belonging to selected client job
- **PO folders** of freelance jobs belonging to selected client job
- **Client folder** of respective client.

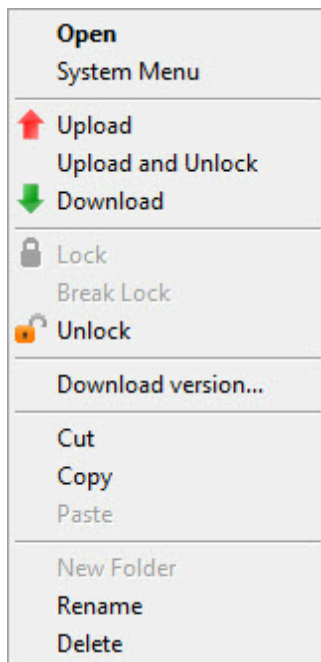
New Freelance Job (Edit Freelance Job) — PO folder of related purchase order. Related folders options:

- **Project folder** of respective project
- **FTP client**
- **JA folders** of corporate jobs belonging to the same project
- **PO folders** of the rest of freelance jobs belonging to this project

New Corporate Job (Edit Corporate Job) — JA folder of related job assignment. Related folders options:

- **Project folder** of respective project
- **FTP client**
- **PO folders** of freelance jobs belonging to the same project
- **JA folders** of the rest of corporate jobs belonging to this project

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.

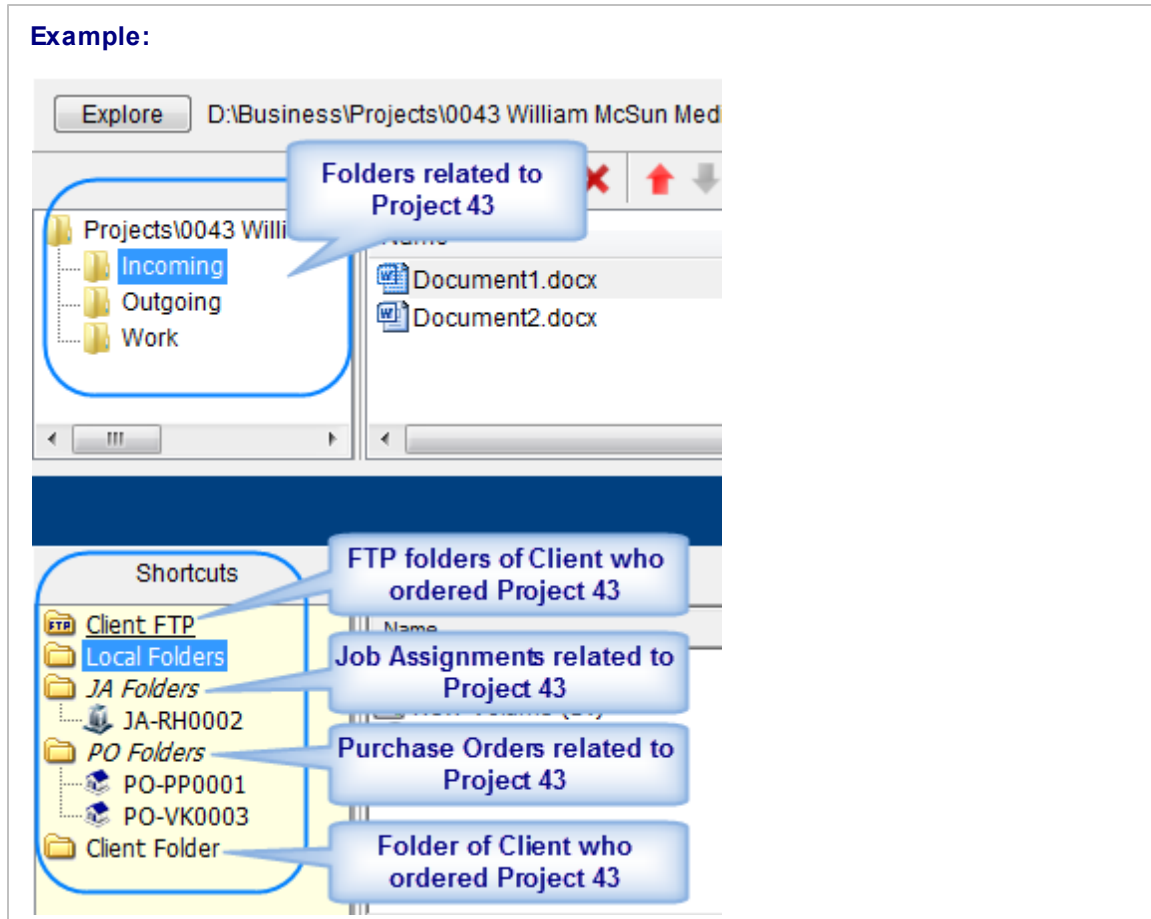
New Folder - create a new folder in the selected location.

Rename - rename a folder.

Delete - delete selected folders.

4 Shortcuts

Shortcuts contain information relevant to currently open folder. For example, manager working with **project files** might also need access to **purchase orders** and **job assignment** folders. To quickly open folders of particular project's POs and JAs, this person can use **Shortcuts** area.




Shortcuts vary, depending on the context.


- *Client related folders* are: *Project* folders of this client's projects.
- *Project related folders* are: *Job Assignment* folders, *Purchase Order* folders, *Client* folder of selected project.
- *Corporate expert related folders* are: *Job Assignment* folders of selected expert.
- *Freelance expert related folders* are: *Purchase Order* folders of selected expert.

Shortcuts list can also be used to open any folder on local PC, as well as to connect and work with FTP folder.

- Select **Local Folders** option to open folders on local PC.
- Select **Client FTP**, **Expert FTP** or **Freelancer FTP** to connect and work with FTP folders.

Any option selected in **Shortcuts** list is opened in separate field of **Files** tab:

 **Note:** If you change the client code or expert name (it can be done from **Main** tab of the **Client** or **Expert** window respectively, **Projetex** will attempt to rename the appropriate folder.

 **Note:** The location of BusinessServer folder is specified on the setup stage and can be changed on **Folders** tab of **Advanced Settings** window.


5 FTP folders access

Projetex features built-in FTP client, which can be used to quickly access FTP folders of clients and experts to upload or download workflow files.

To access FTP client:

1. Open **Files** tab of any client, project or expert.
2. In **Related Folders** field select **Client/Expert/Freelancer FTP** option.


FTP access interface

- **FTP** indicator indicates connection status. Red indicator is displayed if FTP server status is disconnected. When the server is connected, indicator will change to green.
- Click **Connect/Disconnect** button to connect/disconnect to currently selected FTP server in nearby drop-down list.
- Click **Manage Connection** button  to create new FTP connection, edit or delete currently selected FTP connection.

Creating new FTP Connection

In order to connect to FTP folder you will need to create an **FTP Connection** for this folder, which implies entering FTP server address, and login information, which later will be used by **Projetex** to log in to this FTP folder.

To create a new connection:

1. Click **Manage Connections** button 
2. Select **New connection ...** in the appeared menu:
3. Enter a name of new connection, FTP server address, user name (FTP login) and password (**Projetex** will memorize your password).
4. Click **OK** button to create this FTP connection.

Connecting to FTP

Once FTP connection has been created, it can quickly be activated with the help of **FTP connections** drop-down list.

1. Select the required **FTP Connection** in the drop-down list to connect to this FTP server.
2. Click **Connect** button to display the contents of FTP in the field below.

6 File versions

Any changes to files stored on server are tracked. When the file has been changed, previous version is saved as a separate file to *Versions* subfolder within *BusinessServer* on *Server Administrator* computer.

It is possible at any time to restore any version of the file in **Files** tab of **Client**, **Project**, **Corporate Expert** and **Freelancer** window.

Download version command from context menu opens **File versions** window.

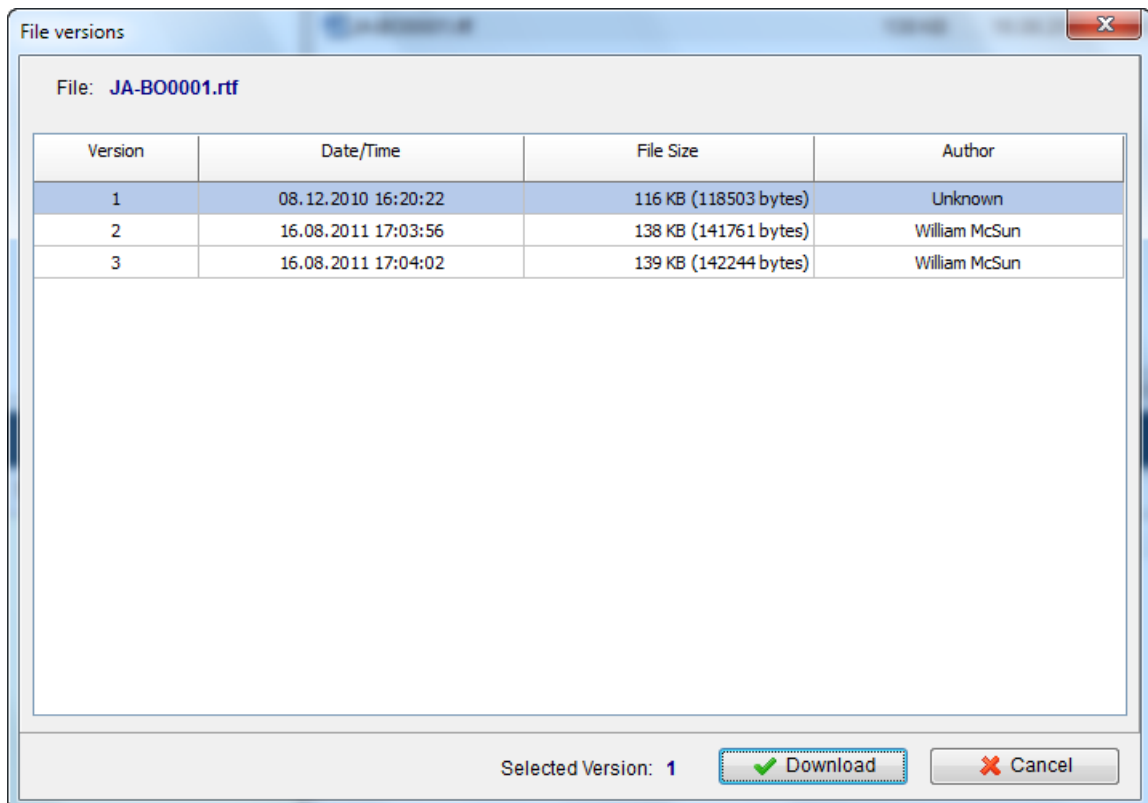


Table of file versions shows the version number, modified date and time, file size and author.

Selecting version and clicking **Download** button will copy the file from *Versions* archive to proper **Client**, **Project**, **Corporate expert** or **Freelancer** folder.

7 Mass File Operations


Projetex provides the following mass operations with files saved in **Projetex** file system: *Upload Changes* and *Clear Locks*.

Upload Changes

To open **Upload Changes** window, click **Team** and then click **Upload Changes** button. **Projetex** will find all unloaded on server and modified locally files and sort them by the following tabs:

- **Clients** tab contains unloaded modified files from clients folders;
- **Projects** tab contains unloaded modified files from projects folders;
- **Corporate experts** tab contains unloaded modified files from corporate experts folders;
- **Freelancers** tab contains unloaded modified files from freelancers folders.

By default, all modified files are selected to upload. To avoid loading of some files, deselect checkboxes opposite to names of these files. Then click **Ok** button to start uploading.


 **Important Notice:** Only those files which have been already *locked* will be added to the list of unloaded modified files .


Clear Locks

To open **Clear Locks** window, click **Team** and then click **Clear Locks** button. **Projetex** will find all locked files and sort them by the following tabs:

- **Clients** tab contains locked files from clients folders;
- **Projects** tab contains locked files from projects folders;
- **Corporate experts** tab contains locked files from corporate experts folders;
- **Freelancers** tab contains locked files from freelancers folders.

By default, all locked files are selected to unlock. To avoid unlocking of some files, deselect checkboxes opposite to names of these files. Then click **Ok** button to start unlocking.

 **Important Notice:** If you cleared locks of files and these files are unloaded on server and modified locally, they will not be displayed in **Upload Changes** window.

 **Note:** **Projetex** will display only those unloaded modified files or locked files which have been locked by the current user.

8 Folder Structure Administration in Projetex

Location of *BusinessServer folder* as well as automatic folder creation options can be changed with the help of **Folders** tab of **Corporate Settings** window in *Projetex Server Administrator*.

To open Folders tab, click **Folders** in the left part of the **Corporate Settings** window.

Business folder location

General tab of the Folders section can be used to change location of the *Business* folder. Client, project and expert folders are located inside the *Business* folder.

To change the default location, click **Change** button and select new location on a local PC or in a network.

Folder settings

Other tabs of the **Folders** section represent different types of folders inside *Business* folder.

Use **Add Folder** or **Add Subfolder** buttons to add folders which will be automatically created inside of each new client, project, expert, JA and PO folder.

Project folder tab also can be used to configure the names of project folders.

Automatic folder creation

With the help of automatic folder creation feature for any folder in *Projetex* you can define a number of subfolders to be automatically created upon creation of their parent folder . To enable this feature for certain folder type, select **Automatic Folder Creation** checkbox on the tab of required folder in *Projetex Server Administrator*, in **Folders** section of **Corporate settings** tab.

Every time **Client**, **Project** or **Expert** folder is created by *Projetex Workstation*, any folders or subfolders added to respective tab of **Folders** settings will be created in that folder automatically

To disable creation of customized folders clear **Automatic Folder Creation** on the corresponding tab.

All changes with these custom folders will not be implemented for client and expert with existing **Client** or **Expert** folder.

Project folder name

The way **Project folders** are named can also be customized to some extent. Name of each **Project folder** can consist of the following components:

Project code (obligatory)

Project manager name

Project name

Composition of **Project folder** names can be modified on the **Project Folder** tab of the **Folders** tab of **Projetex Server Administrator Corporate Settings**.

Click **Update Folders** button to apply changes to the names of all Project folders, created before. This feature is available only for name of projects' folders and does not have effect on other folder names.