



Projetex 3D Migration Guide

*A Guide to Ease Your Migration to Projetex 3D
from Other Versions of Projetex*

©2017 Advanced International Translations

Table of Contents

Introduction	2
Upgrading to Projetex 3D from Earlier Versions	3
Database Conversion	3
Using the Projetex 3D Database Converter	4
Key Differences from Earlier Versions	6
The MS SQL Database Engine	6
Overhauled UI	6
Navigation Bar and Repositioned Toolbars	6
The Backstage View	7
Overhauled Calendars and Reports Sections	8
History Function Overhaul	8
Overview of New Features	9
Prospects	9
Applicants	9
Knowledgebase	10
Built-In Mail Sender	10
Dashboard	11
Global Search	12
Dynamic Reports	13

Introduction

If you are reading this guide, you most likely are the proud owner of a copy of Projetex—our dedicated, business-level translation project management software.

It also means that you recently have or are considering upgrading from your current version of Projetex to our newest offering in this software line: Projetex 3D.

Projetex 3D is a major update with extensive changes, including an overhauled User Interface and a new database engine. Furthermore, there is greatly expanded functionality: new Dashboard and Knowledgebase modules, management of prospects and applicants, Dynamic Reports, a Global Search function, and more.

This migration guide will help you transition smoothly into the enhanced system of Projetex 3D, allowing you to make the most use of its full potential!

Upgrading to Projetex 3D from Earlier Versions

If you are currently considering purchasing Projetex 3D, you can see the prices at <http://www.translationmanagementsoftware.com>

The price depends on the number of simultaneously active workstations it supports and the version of Projetex you currently own.

Database Conversion

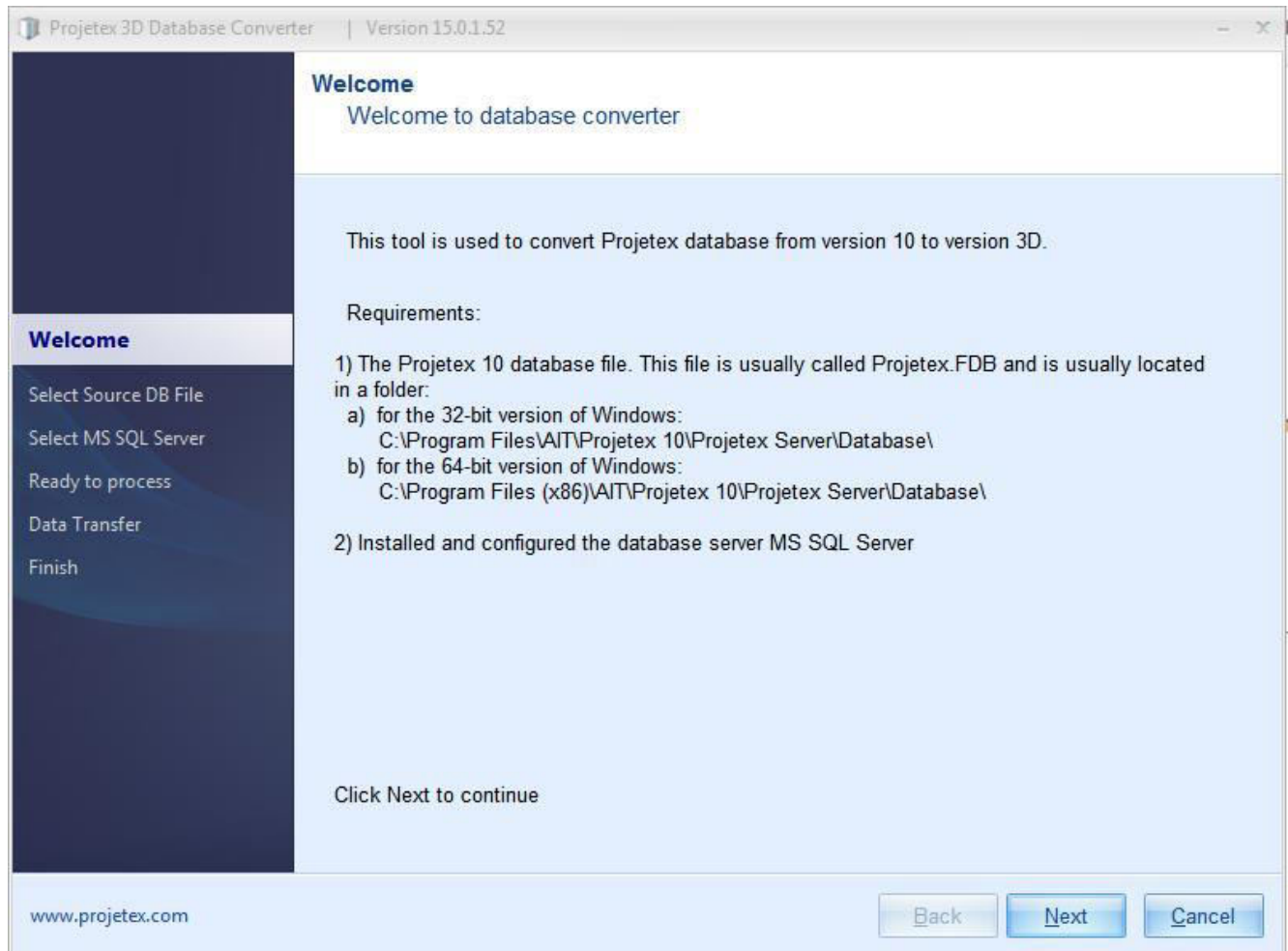
Once you install Projetex 3D Server Administrator, you will notice that it uses a different database engine from our previous version of Projetex (see Key Differences from Earlier Versions).

So how can you use the already extensive database in Projetex 3D? Easy! Projetex 3D comes bundled with a special piece of software called the Projetex 3D database converter.

This handy little program will ensure that none of the data you have gathered so far will be lost, and it will save you the pain of manual re-entry.

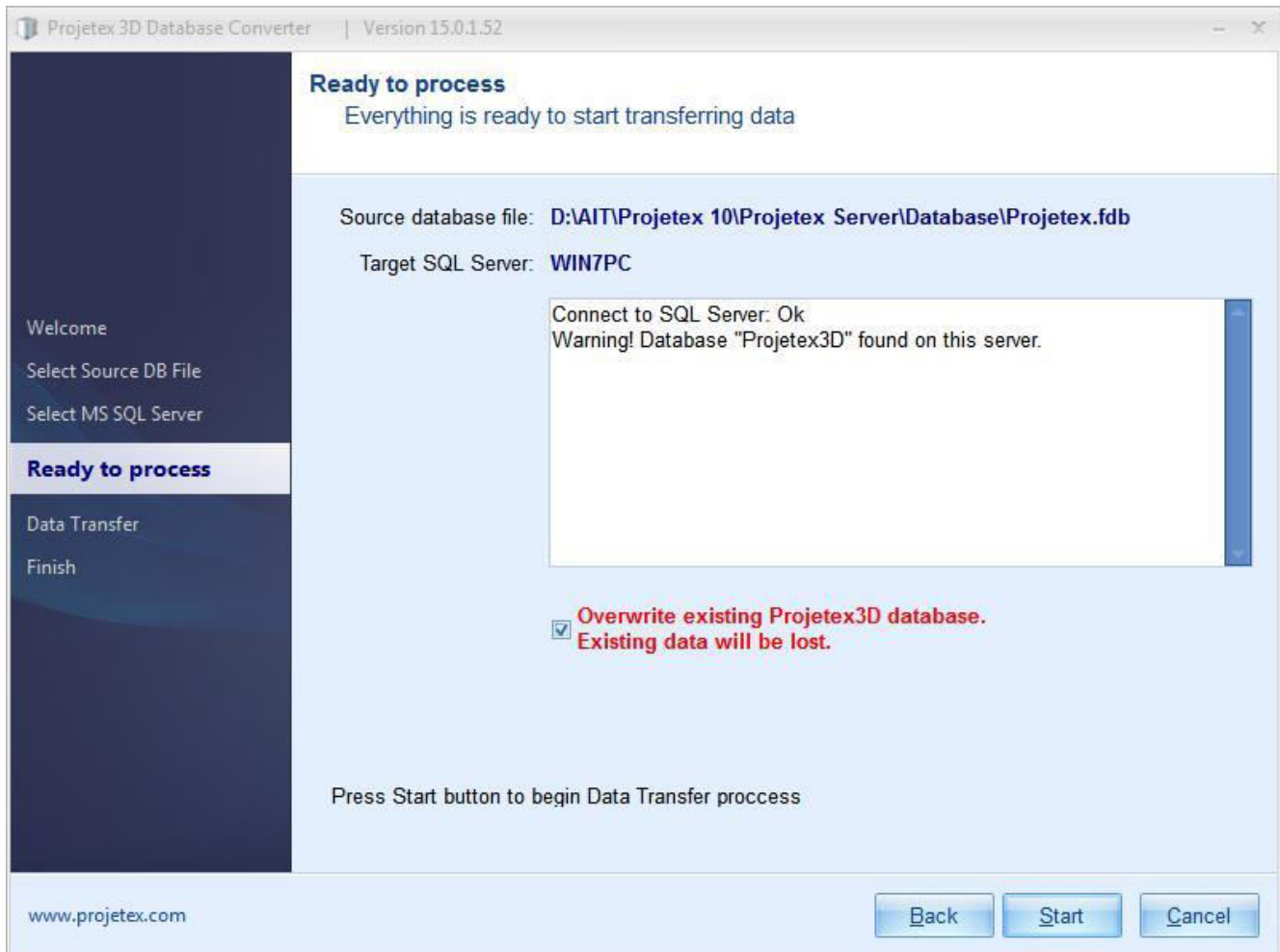
Using the Projetex 3D Database Converter

The Projetex 3D database converter is quite easy to use. In fact, when you start, the first screen you see will give you directions to the most likely location of the Projetex 10 database file.



In the next two screens, you will navigate to the folder that contains your Projetex 10 database file (select the file itself in the lower field) and select the currently active Projetex 3D server.

If you installed Projetex 3D with the demo or empty database, the "Ready to process" screen will inform you that a Projetex 3D database already exists.



Check the "Overwrite existing Projetex 3D database" box and click Start. (Make sure that Projetex 3D is not currently running. A database in use will not be altered.)

After the transfer is complete, your Projetex 10 database will be ready for use in Projetex 3D.

Key Differences from Earlier Versions

The MS SQL Database Engine

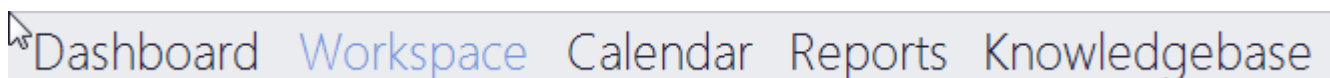
Projetex 3D has transferred from the Firebird database engine to MS SQL. This means that users of previous versions will need to convert their existing databases into the new format, using the bundled database converter, to use them in Projetex 3D (see Upgrading to Projetex 3D from Earlier Versions).

Overhauled UI

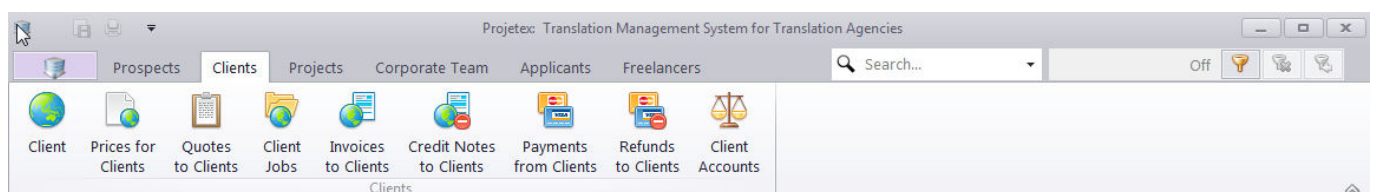
Perhaps the most noticeable change in Projetex 3D, compared to previous versions, is the major User Interface overhaul. There are several aspects to this.

Navigation Bar and Repositioned Toolbars

Due to the expanded functionality of Projetex 3D, the toolbars giving access to the main tables of Projetex 3D have been singled out into a larger section called the Workspace. You can access the Workspace via the new Navigation Bar near the bottom of the screen:

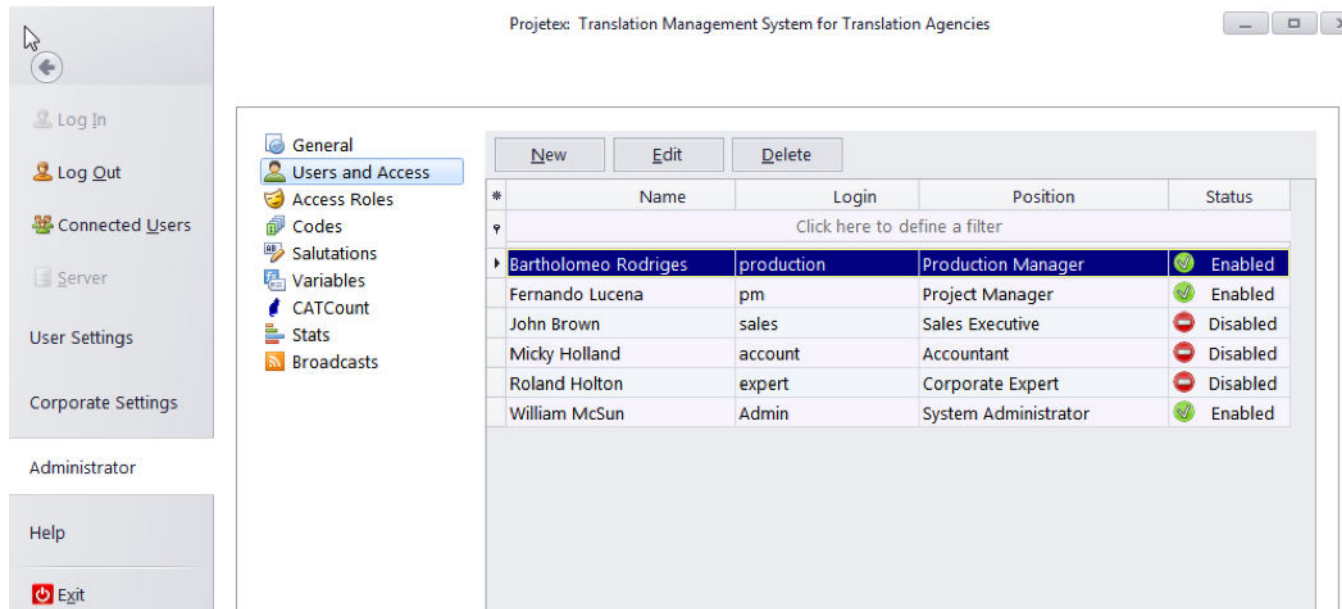


The toolbars have also been moved from the left-hand sidebar of the previous versions to the "Ribbon" near the top of the screen. The Export and Print buttons are now in the top-left corner of the screen while the Global Date Filter, along with the new Global Search function, is near the top-right corner.



The Backstage View

By pressing the Backstage view tab, located to the left of the Prospects tab, you will enter the Backstage view.



The screenshot displays the Projex Translation Management System interface. The window title is "Projex: Translation Management System for Translation Agencies". On the left is a navigation sidebar with options: Log In, Log Out, Connected Users, Server, User Settings, Corporate Settings, Administrator, Help, and Exit. The main content area shows a "Users and Access" section with a table of users. The table has columns for Name, Login, Position, and Status. The first row is highlighted in blue.

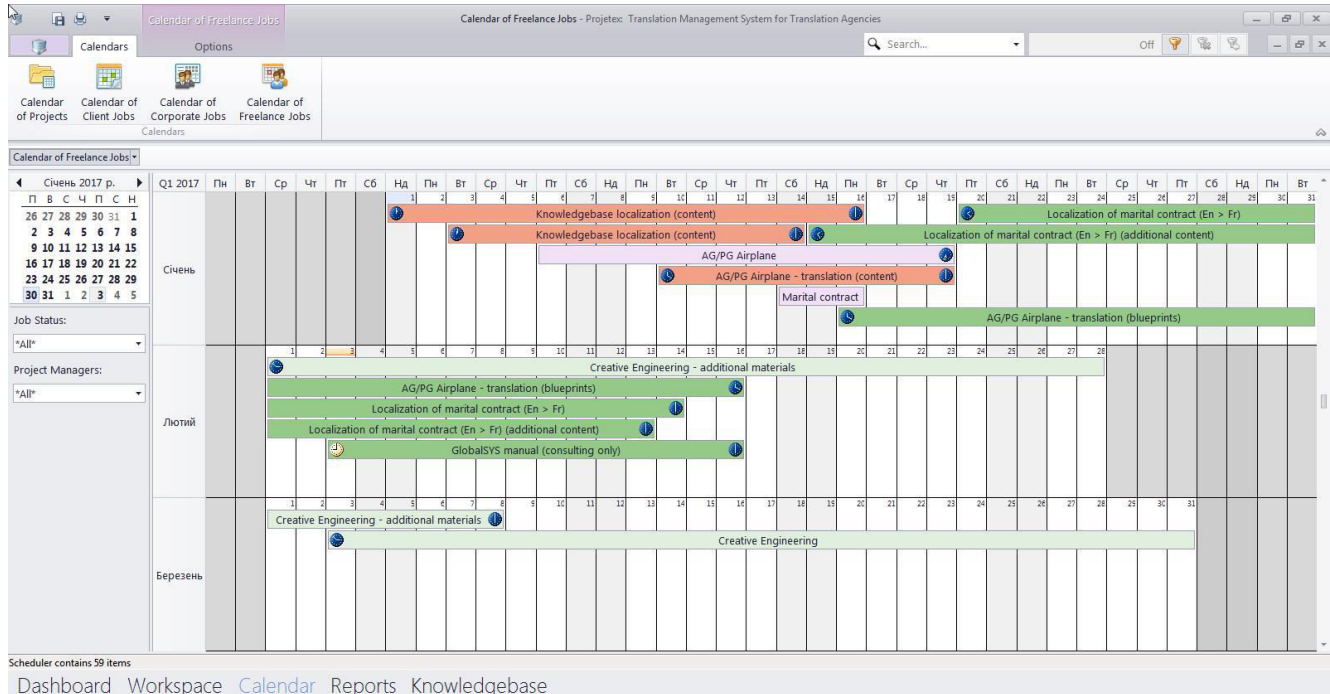
#	Name	Login	Position	Status
	Click here to define a filter			
1	Bartholomeo Rodrigues	production	Production Manager	Enabled
2	Fernando Lucena	pm	Project Manager	Enabled
3	John Brown	sales	Sales Executive	Disabled
4	Micky Holland	account	Accountant	Disabled
5	Roland Holton	expert	Corporate Expert	Disabled
6	William McSun	Admin	System Administrator	Enabled

The most important feature of the Backstage view is that the User\Corporate settings and a large portion of the Administrative settings have moved here from the main window of the Projex workstation and the Server Administrator, respectively.

Now, only Folders, Fields, Queries, and Report templates are controlled by the Server Administrator application. The other functions (General settings, Users, Access Roles, Codes, Salutations, Variables, CATCount settings, Stats, and Broadcasts) can now be found in the Backstage view under the "Administrator" tab.

Overhauled Calendars and Reports Sections

The Schedule tables for Projects and Jobs have been renamed into Calendars and moved from their respective Ribbon tabs into a separate section on the Navigation bar.

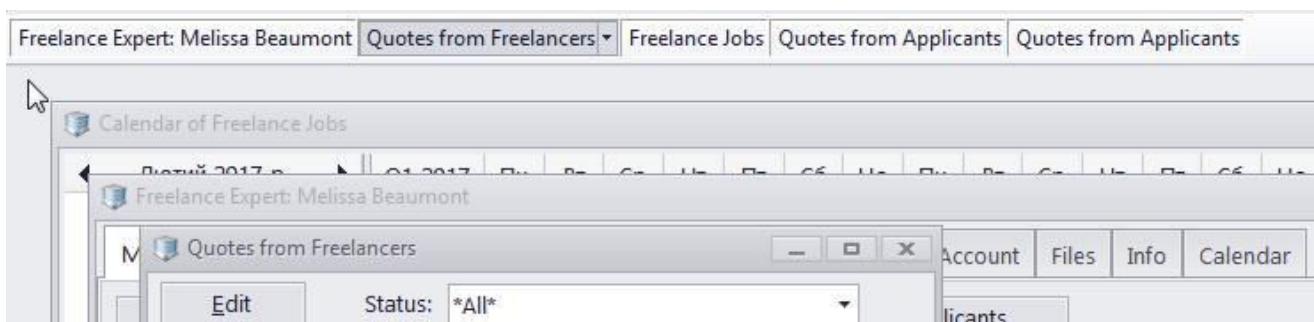


This will allow you to manage all Calendars from a single location.

The Reports section is also accessible from the Navigation bar now. It also includes the new Dynamic Reports, which allow you to define your own Report parameters and effortlessly move elements around.

History Function Overhaul

Table viewing history is no longer managed by simple "Back" and "Forward" buttons. Instead, each table viewed opens as a separate sub-window in the main window. The sub-windows can be moved around and resized, and you can switch between them using the tabs under the Ribbon.

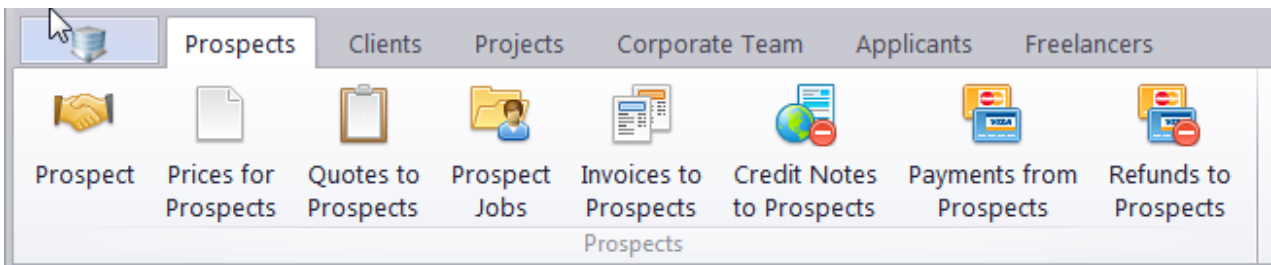


Overview of New Features

Apart from changes and enhancements to existing features, Projetex 3D also boasts a plethora of new features.

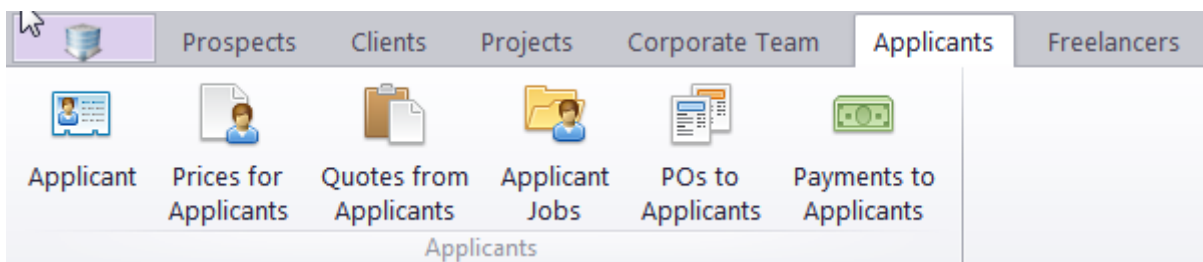
Prospects

This is a new tab in the Ribbon meant to help the company's sales department manager gather and sort information on prospective clients as well as track the progress of negotiations and then quickly convert them to actual Clients.



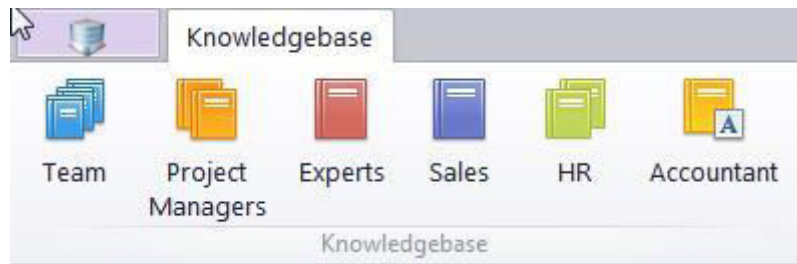
Applicants

Another new tab in the Ribbon, this one was designed for human resources managers. Track promising new translators; gather info on their rates, skills, and qualifications; and once they are hired, quickly convert them into Freelancers.



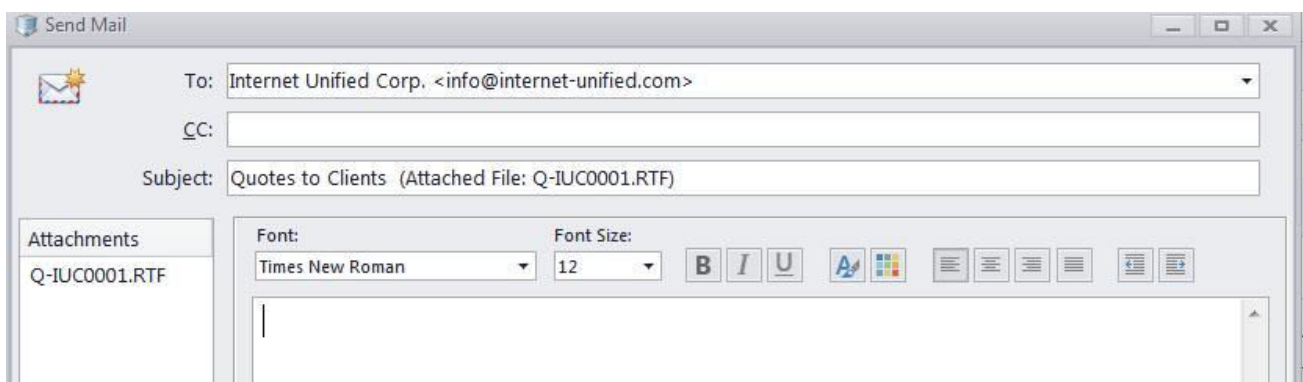
Knowledgebase

A new section accessible via the Navigation bar, the Knowledgebase will allow you to quickly and efficiently collect and manage various internal guides, instructions, and manuals and then grant access to the relevant info to your Project Managers, Experts, Sales representatives, HR managers, and Accountants.



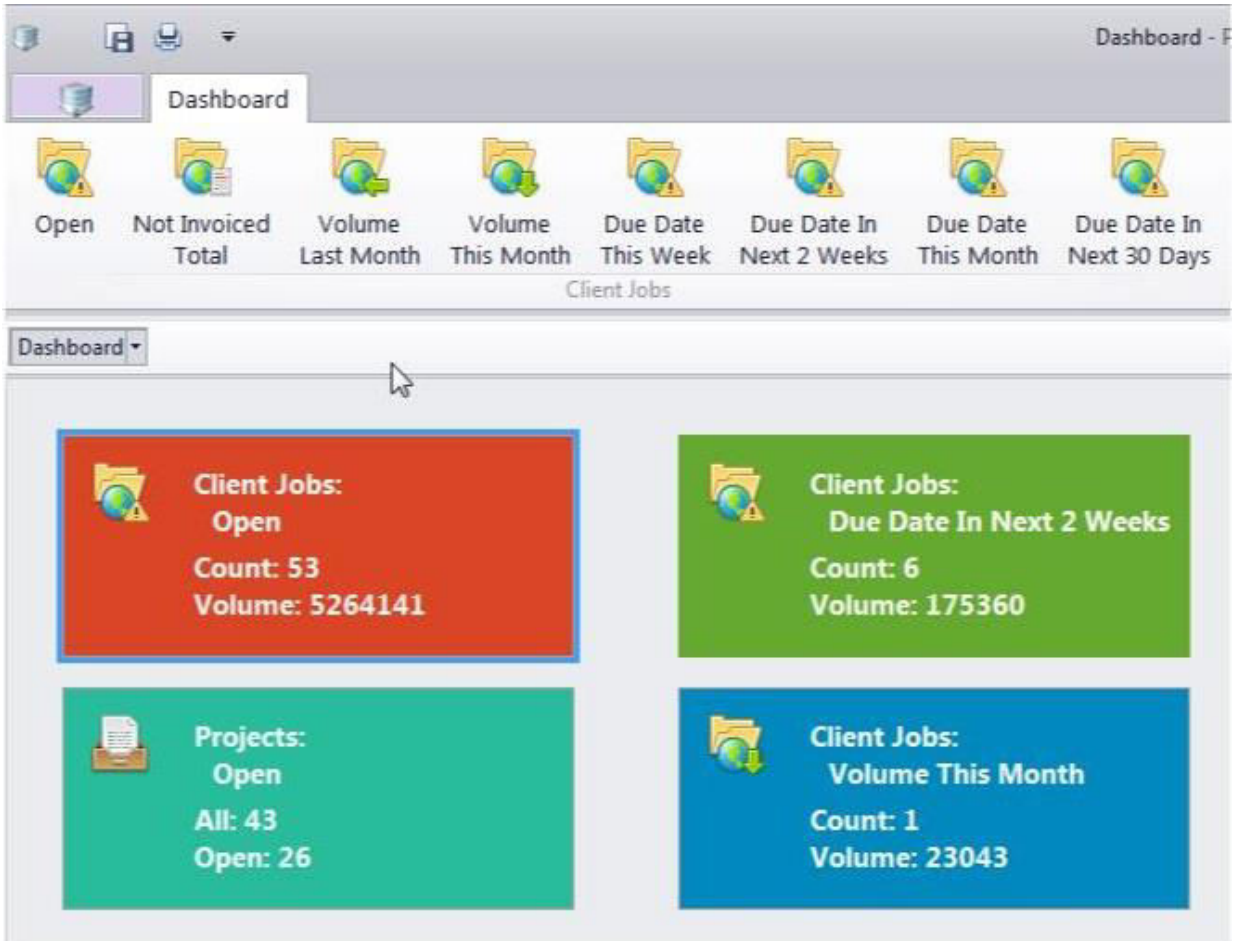
Built-In Mail Sender

The new Mail Sender will allow you to create templated documents (price lists, receipts, business offers, and more) in just a few clicks and send them via email directly from Projetex. To access the Mail Sender, click the "Send E-mail" button in the Edit window for a table entry or in the bottom-right corner of the "Prices" tables (Prices for Prospects, Clients, Corporate Experts, Applicants, Freelancers).



Dashboard

A new, convenient way to see all the essential information at once without having to scour multiple tables. If you want to see more detailed information, just click a widget to open the corresponding table. You can access the Dashboard via the Navigation bar.



Global Search

The new Global Search function allows you to find ALL the documentation on a specific topic in your database and refine the results afterward. The results are separated into the "People" and "Objects" tabs and automatically sorted by the context in which they appear. Double-clicking an item in the results will take you to the corresponding table.

Search Result - Projetex: Translation Management System for Translation Agenci

Search for: Search

Search area:

- Projects
- Prospects
- Profiles
- Clients
 - Profiles
 - Contacts
 - Quotes
 - Jobs
 - Invoices
- Corporate Experts
 - Profiles
 - Jobs
 - JAs
- Freelancers
 - Profiles
 - Quotes
 - Jobs

Case sensitive

Limit search results to: entries per context

Search only:

Objects [0] People [15]

* Context	Name	E-mail	Phone
Corporate Expert	Allyson Laven	Allyson@projetex.com, Allyson@catcount.cc	+ 32 223 4890324
Corporate Expert	Javier Kuster	Javier@projetex.com, Javier@to3000.com	+32 278 9809123
Corporate Expert	Bryon Ortolano	Bryon@projetex.com, Bryon@aithelp.com	+32 227 8799233
Corporate Expert	Alvaro Wigren	Alvaro@projetex.com, alvaro@anycount.com	+32 245 4879789
Corporate Expert	Ronald Holton	Ronald@projetex.com, Ronald@catcount.cc	+32 278 9789789
Corporate Expert	Jennie Schofield	Jennie@projetex.com, Jennie@catcount.com	+32 279 3234566
Corporate Expert	Latoya Pittman	Latoya@projetex.com, Latoya@aithelp.com	+32 243 5890435
Corporate Expert	Timo Turunen	Timo@projetex.com, Timo@anycount.com	+32 278 9234234
Corporate Expert	Sheryl Hirsch	Sheryl@projetex.com, Sheryl@translation3000.com	+32 243 2543807
Corporate Expert	Shelia Watts	watts@projetex.com	+32 278 9234234
Freelancer	Theresa Suarez	suarez@projetex.com, theresa@catcount.com	
Freelancer	Pamela Lafontaine	Pamela@projetex.com	+33 556 8706762
Freelancer	Peter Pendleton	peter@projetex.com	+ 44 141 6841064
Freelancer	Koen Haanrath	koen@aithelp.com, koem@projetex.com	+31 237 4494969
Freelancer	Vesa Kopitello	vesa@projetex.com	

Advanced... <Filter is Empty>

15 of 15

Dashboard Workspace Calendar Reports Knowledgebase

Dynamic Reports

The Reports section functionality has been greatly expanded with the new Dynamic Reports, allowing you to set your own report parameters and drag and drop elements into place. You can also filter the data to be displayed, so, at any given moment, you will see only the information you are looking for.

The screenshot displays a software interface for generating reports. At the top, there is a navigation bar with a 'Custom' tab and a '3D' view indicator. Below this is a menu of report types: Corporate Jobs, Freelance Jobs, Client Jobs, Projects: Active PMs, Projects: All PMs, Corporate JAs, Freelance POs, Client Invoices, Corporate Payments, Freelance Payments, and Client Payments. A search bar below the menu shows 'Freelance Jobs' selected. The main area contains a prefilter section with various dropdown filters: Client, Freelancer, Group of services, Service, Currency, Volume (words), Month & Year, Quarter, and Month. Below the filters, there are additional dropdowns for 'Job:' and 'Total (EUR)'. The data table below shows a comparison of jobs and total EUR for Project Managers in 2016 and 2017, along with a Grand Total.

Project Manager	2016		2017		Grand Total	
	Jobs	Total (EUR)	Jobs	Total (EUR)	Jobs	Total (EUR)
Bartholomeo Rodrigues	1	0,00	1	2 700,00	2	2 700,00
Fernando Lucena	12	0,00			12	0,00
Micky Holland	1	0,00			1	0,00
William McSun	25	9 173,10	1	440,00	26	9 613,10
Grand Total	39	9 173,10	2	3 140,00	41	12 313,10