



## **Schedules in Projetex — Reference Guide**

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# 1 Introduction

*Schedules* for clients, *projects*, *corporate experts* and *freelancers* in *Projetex* can be used to obtain a visualized representation of work process. With the help of schedules, various managers can have a comprehensive view of project and job intensity at any given moment.

Two kinds of the **Schedules** are provided for each of the listed parts of *Projetex*:

Clients	<ol style="list-style-type: none"><li>1. Schedule of projects (and corresponding client jobs) for the selected client.</li><li>2. Schedule of all projects.</li></ol>
Projects	<ol style="list-style-type: none"><li>1. Schedule of client jobs (and corresponding expert jobs) for the selected project.</li><li>2. Schedule of all projects and client jobs.</li></ol>
Corporate Team	<ol style="list-style-type: none"><li>1. Schedule of corporate (in-house) jobs for the selected expert.</li><li>2. Schedule of all corporate jobs.</li></ol>
Freelancers	<ol style="list-style-type: none"><li>1. Schedule of freelance jobs for the selected freelancer.</li><li>2. Schedule of all freelance jobs.</li></ol>

## 2 General issues on schedules

On the left panel of any **Schedule** tab the names of the jobs or projects (depending on the particular **Schedule**) are displayed. The schedules are represented in the form of horizontal bars, spanning through a grid in which each column represents a certain time unit (hour, 8 hours, 12 hours or day).

The color of the schedule bar represents the status of the process it displays:

	Red frame means that deadline for the process was in the past.
	Blue frame means that deadline for the process is later today.
	Green frame means that deadline for the process is in the future.
	This process has not been finished in time. The red fragment indicates overdue time
	Red dots in the end/in the beginning of the process bar indicate that this process spans beyond the currently selected schedule period.

 **Note:** Status colors can be changed on the **Current Users Settings > Colors: Status** tab.

 **Note:** Double-click on the column representing the *job* to open **Edit Job** window for this *job*.

Schedules are displayed for certain period. To specify the period, use **Selected Period** drop-down lists (select two dates: from-to). To apply the selected time period click **Apply** button.

Thus only schedules which fall between the two assigned dates will be displayed.

The column scale of the calendar can be 1 day, 12 hours, 8 hours or 1 hour.

Use **Column Scale** drop-down list to specify the necessary value.

The set of available values for calendar graduation varies depending on the length of the *selected period*.

The width of the columns can range from small to large. Use **Column width** options to specify the necessary value.

## 3 Schedules Review

### 3.1 Client Schedules

#### Schedule of projects (and corresponding client jobs) for the selected client

**Schedule** tab of the **Client** window displays schedules of this client's *client jobs*. Names of projects are displayed in the column to the left. Job schedules are grouped by projects.

Double-click any schedule representing the client job to open **Edit Client Job** window for this job.

To open *schedule* for a particular *client*:

1. Click the **Client** icon in the **Navigation** panel; switch to the **Main** tab.
2. Select the necessary *client* from the **Clients** list on the **Main** tab.
3. Switch to the Schedule tab of the **Client** window.

#### Schedule of all projects

To open the *schedule* of all projects, click on the **Schedule of Projects** icon from the **Clients** set of **Navigation** panel.

Schedule of Projects window displays schedules of all clients' projects.

## 3.2 Projects Schedules

### Schedule of client jobs (and corresponding expert jobs) for the selected project

**Schedule** tab of the **Project** window displays schedules of this project's *client jobs* and *expert jobs*. Click any *client job schedule* (upper schedule field) to view schedules all relevant *expert jobs* (lower schedule field).

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

To open *schedule* for a particular *project*:

1. Click the **Project** icon on the **Navigation** panel; switch to the **Main** tab.
2. Select the necessary **Project** from the **Project** list on the **Main** tab.
3. Switch to the **Schedule** tab of the **Project** window.

**Schedule** tab of the **Project** window is divided into two parts: client jobs of the selected project are displayed in the upper part.

If you want to see the *expert jobs* of the particular *client job*, click the corresponding client job schedule in the upper part and then select **Only Expert Jobs of Client Job selected** option.

### Schedule of all projects and client jobs

To open this type of schedule page click **Schedule of Client Jobs** icon in the **Projects** scope of the **Navigation** panel.

**Schedule of Projects** window displays schedules of all projects which fall into the scope of the selected period. The schedules are grouped by clients.

You can select to display projects with particular completion status only using **Status** drop-down menu in the upper right part of the **Schedule of Projects** window.

If you want to see the client jobs of the particular project, select the corresponding project schedule in the upper part and then select **Only Client Jobs of the Project selected above** check box.

Double-clicking on the column, representing a **Project**, you can open the **Edit Project** window where you can change the details of the project.

## 3.3 Corporate Team Schedules

### Schedule of corporate (in-house) jobs for the selected expert

**Schedules** tab of **Corporate Expert** window provides a project manager with visual representation of job processes of a certain **corporate expert** in the form of schedules.

To open schedule for a particular corporate expert:

1. Click **Corporate Expert** icon on the **Navigation** panel; switch to the **Main** tab.
2. Select the necessary **expert** in the **Corporate Expert** list on the **Main** tab.
3. Switch to the **Schedule** tab of the **Corporate Expert** window.

### 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 only led by certain **Project Managers**.

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

### Schedule of all corporate jobs

**Schedule of Corporate Expert Jobs** displays schedules of all currently assigned corporate jobs.

Corporate job schedules are grouped by corporate expert, assigned to these jobs.

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

### 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 assigned to certain project managers.

## 3.4 Freelancers Schedules

### Schedule of freelance jobs for the selected freelancer

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

Click any *expert job schedule* (upper schedule field) to view schedules all relevant *expert jobs* (lower schedule field).

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

To open *schedule* for a particular *freelancer*:

1. Click **Client** icon on the **Navigation** panel; switch to the **Main** tab.
2. Select the necessary *freelancer* in the **Freelancers** list on the **Main** tab.
3. Switch to the **Schedule** tab of the **Freelancer** window.

### Filtering Schedules of Corporate Jobs

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

### Schedule of all freelance jobs

Schedule of all freelance jobs window displays job schedules of all the freelancers in the database. To open **Schedule of Freelance Jobs** window click **Schedule of Freelance Jobs** icon in the **Freelancers** section of **Navigation Panel**.

This schedule can be used to get the picture of all freelance jobs for the specified period. At a glance you see which jobs need immediate attention.

### Filtering schedules of freelance 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 assigned to certain project managers.