Calendars in Projetex — Reference Guide

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1 Introduction

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

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

Clients	1. Calendar of projects for the selected client. 2. Calendar of all projects.
Projects	1. Calendar of client jobs for the selected project. 2. Calendar of all client jobs.
Corporate Team	1. Calendar of corporate (in-house) jobs for the selected expert. 2. Calendar of all corporate jobs.
Freelancers	1. Calendar of freelance jobs for the selected freelancer. 2. Calendar of all freelance jobs.

2 General Calendars

The Calendar section displays all projects and jobs in the visual format of calendar blocks. Each block stretches across the calendar from assignment until completion, or until the deadline if the job/project has not been completed yet.

The section has four different calendars in it, accessible from the Ribbon: **Calendar of Projects, Calendar of Client Jobs, Calendar of Corporate Jobs, Calendar of Freelance Jobs**.

Each calendar displays the corresponding Jobs or projects for all clients. Double-clicking a calendar block opens the Edit window for the corresponding job or project.
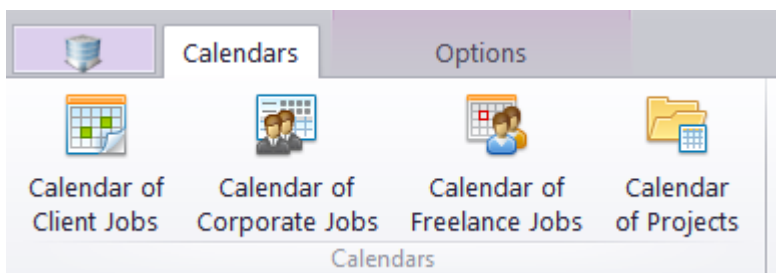
Settings for the Calendar view

The following settings for the calendar page are available after opening a calendar:

Basic navigation - the Ribbon displays icons for moving backward and forward in the calendar by a single interval, and quick navigation to **Today**.

Viewed period - the Ribbon displays icons for selecting the time interval to be viewed (day, work week, week, month, year), as well as the special Timeline View.

Note: In **Day View** and **Work Week View**, jobs shorter than one day are displayed across the rows representing hours, while longer jobs are displayed above the hour-rows.

Grouping and special options - the Ribbon displays icons for changing the layout of the viewed interval (**Group by None, Group by Date, Group by Clients/Experts**), and special options for **Weekend** or **Off hours** display.

Mini-calendar - the mini-calendar on the left displays the month and date currently viewed. Click a date to switch to it. To move to a different month, click the greyed-out dates, the Back and Forwards buttons in the month header, or the header itself. Click a day and drag to view all days selected this way.
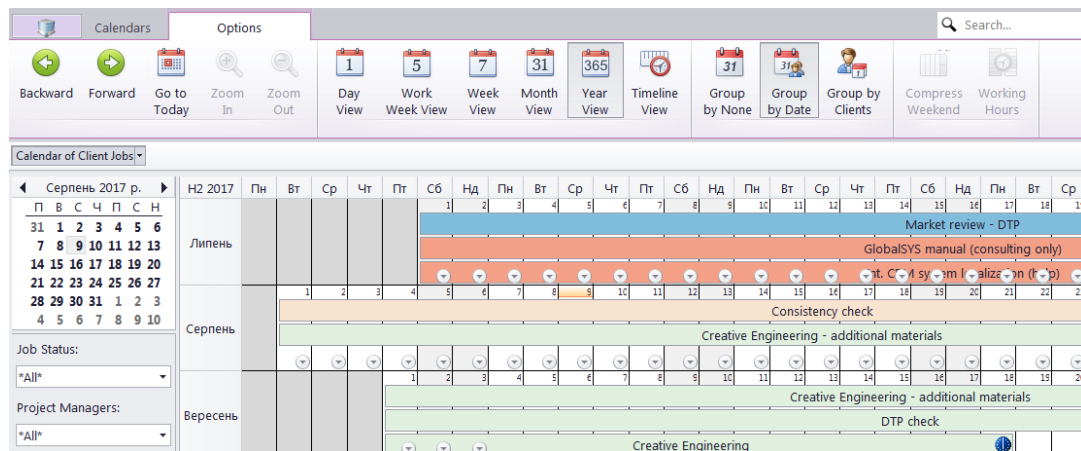
Job/Project block colors

As well as the jobs/projects they represent, job/project calendar bars can have different colors, depending on the statuses of respective jobs/project:

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

Blue — the job/project is not completed and due today.

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

Grey — the job/project is canceled.

Pale Pink — the job/project is completed.

Pale green — the job/project is Heads-Up.

Pale Orange — the job/project is On Hold.

Note: To customize status colors, in the **Backstage** view select the **User Settings** section, then click **Colors: Status**.

Filtering Calendars

Use the **Job Status** filter to display only projects/jobs with a certain status: vacant, completed, not completed, due today, overdue, and so on.

Use the **Project Manager** filter to display only jobs/projects led by certain Project Managers.

3   Individual calendars

Every Client, Project, Corporate Expert and Freelancer in Projetex also has an individual calendar that displays only their Projects, Client Jobs, Corporate Jobs or Freelance Jobs, respectively.

To access the calendar of a specific Client, Project, Corporate Expert and Freelancer? Go to the corresponding table in the Workspace (Clients, Projects, Corporate Experts or Freelancers), select the required record rom the list and switch to the "**Calendar**" tab.

The individual calendars have all the same options as the general calendars.