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:

The **Main** tab — displaying the expert's profile information.

The **Corporate Jobs** tab — displaying all jobs of the expert. This can be used to obtain information on any of the jobs currently assigned.

The **JAs** tab — contains the list of all job assignments, issued for this expert. Check this tab to see which of the assigned jobs to begin work with.

The **Payments** tab — contains the list of all payments, given to this expert.

The **Prices** tab — contains the list of the given expert's individual prices.

The **Account** tab — displays a brief summary of selected corporate expert's accounts.

The **Files** tab — provides secure access to this expert's personal folder in the Business folder. This folder can contain job files, saved JAs, and any additional data.

The **Info** tab — can be used to enter any optional additional information relevant to the selected corporate expert.

The **Calendar** tab — shows the calendars of all corporate jobs of the corporate expert.

The **Team** and **Experts Knowledgebase** tabs — contain internal guides, manuals and other documentation available to the entire team and to corporate experts specifically.

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 in a different background color:

Orange background — *On Hold* status

Green background — *Heads-Up* status

Grey background — *Canceled* status

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.

Price — The job's price can be indicated as either a flat fee, per-unit fee, or free. Cannot be edited by expert.

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

JA Folder — the job assignment folder contains all files an expert would need to begin working on the job. The folder can be accessed by clicking the button on the right side of the address field.

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.

Special Status — these are used when a job needs to be put *on hold, canceled* or when you create *heads-up* (or potential) projects. Jobs with the *on hold* status have their deadlines undetermined, thus on hold projects cannot become overdue. Jobs with the *heads-up* status cannot be set as completed, since the status assumes that work has not yet started. *Canceled* jobs also can not be set as completed, since the status assumes that the project was abandoned. Cannot be edited by expert.

Job Quality — the job quality field allows the quality of a job performed by a corporate expert to be evaluated. It is represented by a number between 1 and 100. A value of 0 means the job has not been rated. Cannot be edited by expert.

Instructions — any instructions or comments of project manager regarding a corporate job can be viewed here. Cannot be edited by expert.

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.

You can save the corporate job data in a printable file, print it, or E-mail it with the help of RTF templates.

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

The screenshot below marks all the areas of the Edit Job window a corporate expert and edit or interact with in a way other than simply viewing.

JAs tab (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.

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

Payments tab (for Expert)

The **Payments** tab contains the list of payments to this corporate expert. Double-click a payment to view it.

Use the **Status** drop-down list to display only payments which are still to be linked with JAs, or only those, that have already been fully linked.

The information on this tab can be edited only by project managers.

Prices tab (for Expert)

The **Prices** tab of contains the list of individual prices for the corporate expert. Double-click a price to view it.

Prices can be quickly copied from general price-list to individual price-list with the help of **Copy from General** button.

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)

Sorting records

To sort the rows in any table, click the column caption in the list.

If you want to sort your table by certain column, left-click the heading in the table.
The order of sorting direction is shown as a triangle arrow near the column caption.
If you click the same column caption one more time, the order of sorting will be reversed:

Code ▾ ▽	Global Code	Sent
I-INTSEC0002	ACME-I0018/201(	11.05.2016
I-INTSEC0001	ACME-I0017/201(	24.07.2016
I-INTI0002	ACME-I0030/201(	06.10.2016

Grouping records

In addition to traditional sorting, records in Projetex tables can also be grouped. This is especially useful if you want to look at records that have specific values in specific fields.

To group a table by a certain column, drag that column's header into the Group Box.

Drag a column header here to group by that column		Group of Services ▽	
＊ Code	**Job Name**	**Project ▲**	**Group of Services** ▽
J-MASARC	Consistency check	AG/PG Airplane	Editing
J-MASARC	AG/PG Airplane - translat	AG/PG Airplane	Translation

The table will be displayed as a list of Groups (values of the column). You can click a Group to expand or collapse it.

Group of Services ▾	
＊ Code	**Job Name**
▸ ▸ Group of Services : Translation	
▾ Group of Services : Testing	
J-ILLDES0(	User hints translation	V
J-WIREAD(	Winlexic localization testii	V
J-WIREAD(	Winlexic localization testii	V

You can drag multiple headers into the Group Box to create a hierarchy of groups.
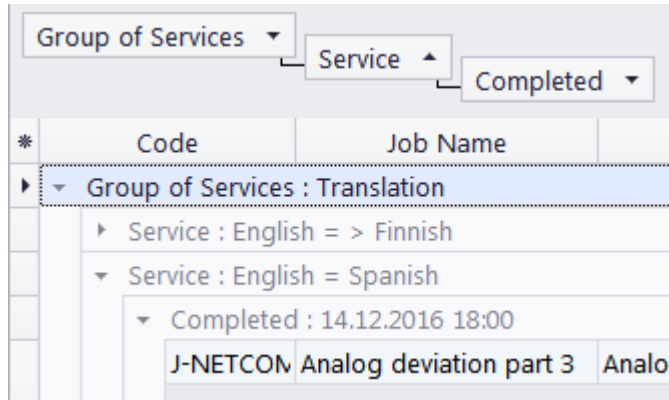
When you drag a header out of the Group Box, it will snap back into its previous position in the table.

Moving columns

To change the order of table columns:

1. Click the column caption and hold the mouse button.
2. Drag your cursor, holding the mouse button, to the desired column.
3. Release mouse button. The column will be moved to the desired place:

Adding and removing columns

You can easily choose columns displayed in a table. To choose displayed columns:

1. Click the Asterisk symbol in the upper-right corner of a table to display a list of columns, available for that table.
2. Choose columns which should be displayed by selecting the appropriate check boxes.

Calendar of corporate expert

Calendar tab offers a schematic visual representation of your jobs in a form of calendar blocks. Double-click any *corporate job calendar* block to open this job for editing.

Settings for Calendar view

The following settings for the calendar page are available:

Viewed period - the Ribbon displays icons for selecting the time interval to be viewed and moving backward and forward interval by interval.

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 the days you drag across.

Job calendars colors

Like the jobs they represent, the expert job calendar bars can have different colors, depending on the statuses of the corresponding jobs:

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

Blue — the job is not completed and due today.

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

Grey — the job is canceled.

Pale Pink — the job is completed.

Pale green — the job is Heads-Up.

Pale Orange — the job is On Hold.

Filtering Calendars of Corporate Jobs

Use **Job Status filter** to display calendars of corporate jobs only with certain Status.

Use **Project Manager filter** to display calendars of corporate jobs which are being led only by *certain Project Managers*.