



Folder Automation and File Management Guide

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1 Projetex Folder Structure

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

The *BusinessServer* folder contains nine folders: *Clients*, *Projects*, *Experts*, *Prospects*, *KB*, *Public*, *Output*, *Templates* and *Versions*.

Experts folder consists of three subfolders: *Corporate Freelance and Applicant*. *Corporate* folder stores corporate expert files; the *Freelance* folder — freelance expert files; *the Applicant* folder — applicant and former expert files.

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

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

The KB folder contains the folders of the knowledgebases created in Projetex.

The Public folder contains files that are accessible to all users.

The Output folder contains exported general Price lists.

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

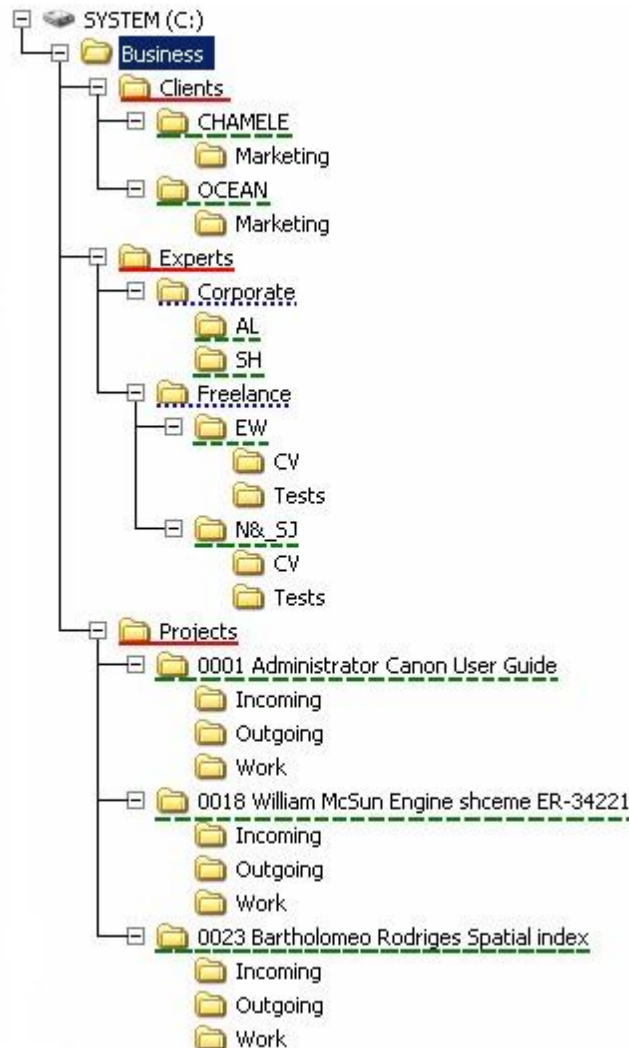
The Versions folder contains all versions of files, which have ever been modified on the Server.

These folders, as well as their subfolders are created automatically when **Projetex Workstation** user clicks the **Folder** button in respective areas of the program (like **Main** tab of **Project** window) or otherwise activates the File manager interface. **Projetex** 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 Projotex



Client\Prospect Folders

A client\prospect folder is a storage location for all files relevant to a particular client. This folder is created through the **Main** and **Files** tabs of **Client** window. The following subfolders are created automatically in *Client* folder, depending on the document being saved: Prices, Jobs Quotes, Invoices and 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, Freelance, Applicant)

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/ Applicant'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.

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**. By default, this includes three folders: Incoming (files received from the client, e. g. text to be translated), Work (files currently being written or processed) and Outgoing (completed work to be sent to the client).

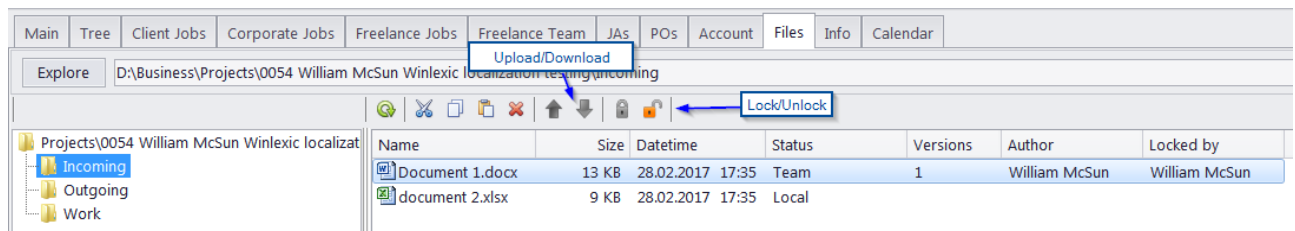
For consistency purposes, name of the project's folder is the same as project code (the default value) and cannot be modified manually. Name of the project folder can include not only unique project code. .

2 File Sharing and Synchronization

Projetest 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 **Projetest Workstation**.

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

Note: All users running **Projetest 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 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 **Projetest Server** PC by right-clicking the file and then clicking **Upload** on the drop-down context menu, or clicking the **Upload** button on the toolbar above the files list.

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.

If a user forgets to unlock their locked files after working on them, but another user needs to work with the same files, 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 files locked by the current user. Use the **Unlock** button to unlock such files.

These operations can be performed on **Files** tabs of **Client**, **Prospect**, **Project**, **Corporate Expert**, **Applicant**, and **Freelancer** windows. The list of files these tabs display includes both local files and files existing on server.

 **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:** Please use the Break Lock function only if you are sure that the file is not being worked on by another user.

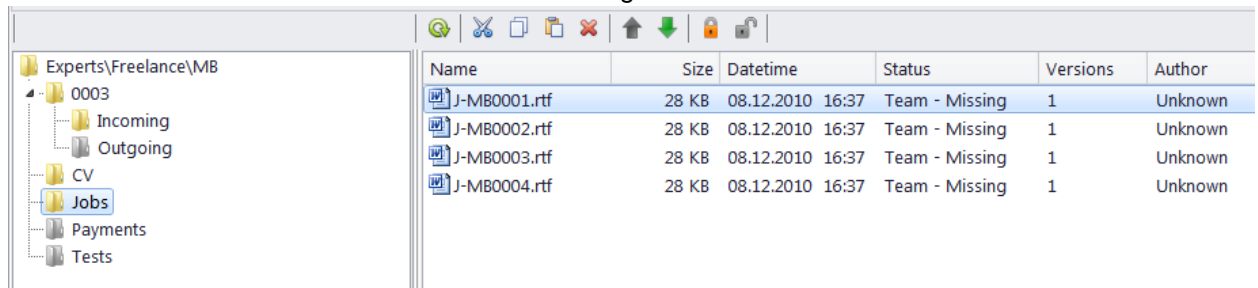
3 Working with files in Projetex

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**. Folders are opened in **Projetex**' built-in file manager. The interface of the **Projetex** file manager is very much like the interface of Windows Explorer with some additional options to enhance the management of your workflow files. This includes related folders and FTP access.

Explore button: click this button to open currently viewed folder in Windows Explorer window. The address bar displays the path to the currently opened folder.

Common file options buttons can be used to perform standard operations with selected files and folders: **Refresh**, **Cut**, **Copy**, **Paste**, **Delete**, **Upload**, **Download**, **Lock**, **Unlock**

The structure of the specified folder is displayed as a *folder structure tree* to the left. Click any of these folders to view its contents in the field to the right.



Folder creation options in different Projetex windows

Edit windows for quotes, projects, experts, jobs and so on, have an option for quick folder access - a button to the right of the folder address that opens the folder in the **Projetex 3D** explorer, and creates it if it does not exist yet.

Project Folder: D:\Business\Projects\0035 William McSun SSH technology\



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.

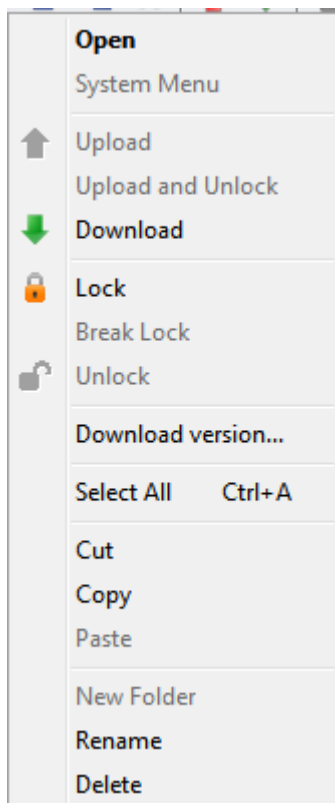
New Freelance Job (Edit Freelance Job) — PO folder of related purchase order. Related folders options:

- **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.

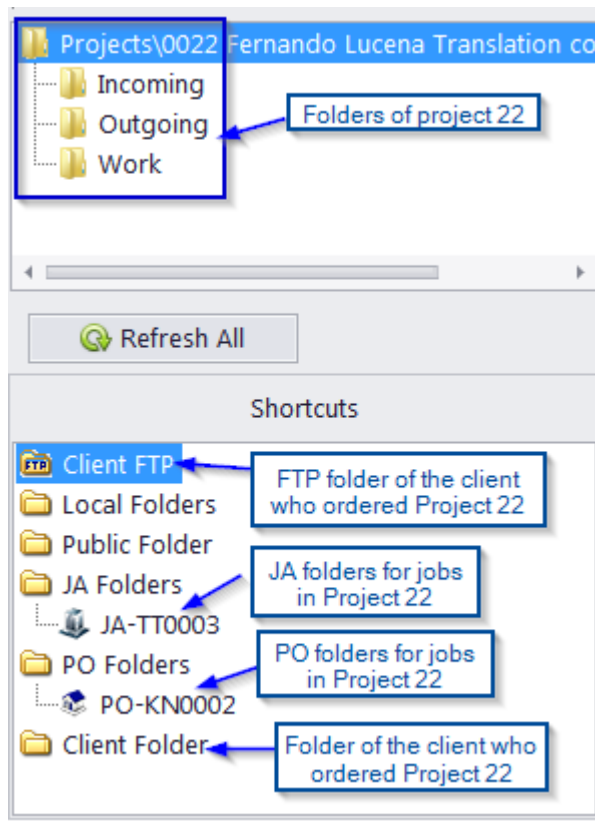
New Folder - create a new folder in the selected location.

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 **Public Folder** to open the shared folder available to all workstation users.
- Select **Client FTP, Expert FTP or Freelancer FTP** to connect and work with FTP folders.

 **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.

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 **Shortcuts** 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 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 the *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.

To open the list for previous version of a file, right-click on it and select **Download version**.

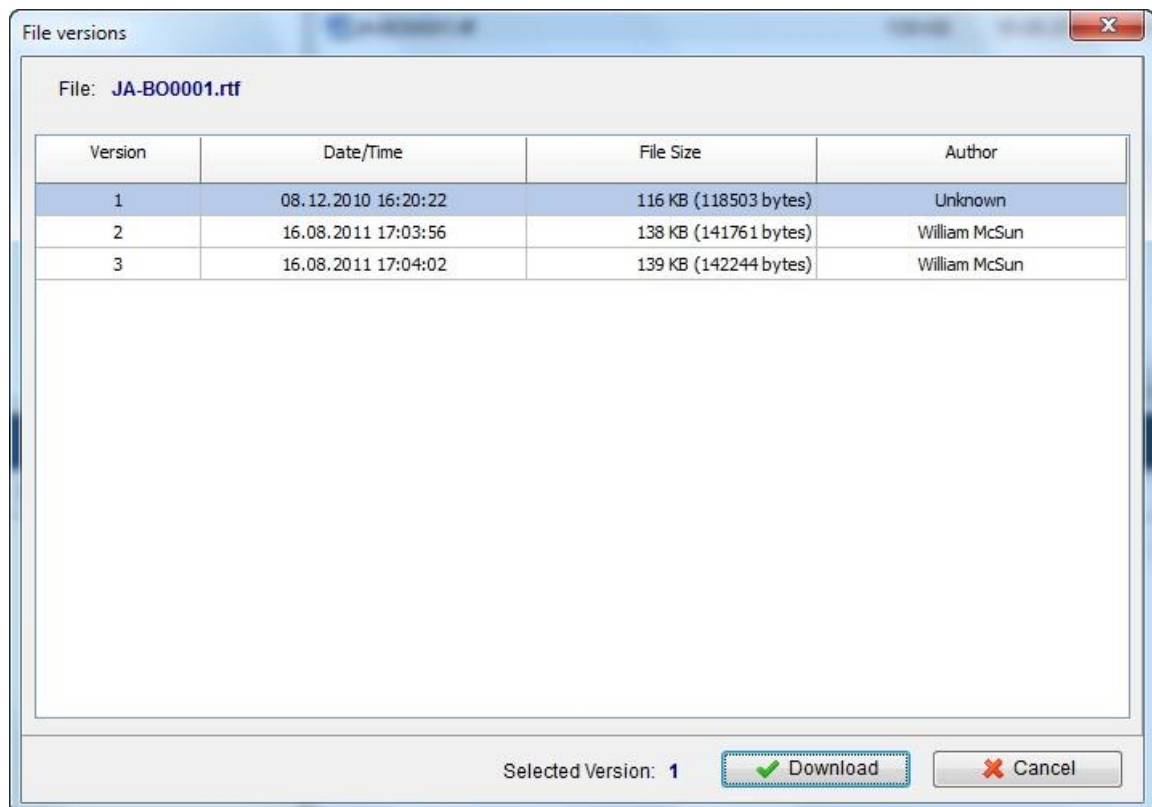


Table of file versions shows the version number, modified date and time, file size and author.

Selecting version and clicking **Download** button will copy the file from *Versions* archive and replace the current version in the local Business folder with the archived version.

7 Mass File Operations

Projetex provides the following mass operations with files saved in [Projetex](#) file system: [Upload Changes](#) and [Clear Locks](#). In the upper-right corner of the window you will see a drop-down menu labelled "Team".


Clicking it will reveal two options: **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.