Projetex 3D HR Manager — Reference Guide

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1 Introduction

This guide covers some of the Projetex features most often used by human resources staff.

These are:

o *Freelance experts database:* creating and updating the database of in-house and freelance experts.
o *Custom fields:* customizing databases with user-defined fields.
o *Application notes:* using the Applicant Table, Application Tracker and Application Notes to track progress of each translator applicant through application process.
o *General prices for freelancers:* managing database of translator rates.

For more information on other topics, like filtering data, reporting and exporting, please refer to the internal Projetex help file, to the other Projetex guides, which can be downloaded from the following web page:

http://www.projetex.com/documentation

2   Interface Overview

2.1   Navigation

The Ribbon is a part of Projetex user interface simplifying and quickening navigation in the program.

You can hide the Ribbon to free display space by clicking the arrow symbol in the lower-right corner of the ribbon.

HR staff of translation agencies would benefit from using windows from **Corporate Team** and **Freelancers** areas of the program. These areas contain the following windows:

Corporate Team group of icons

The **Corporate Expert** window displays a list of employed in-house experts and consolidated information about the selected in-house expert. Corporate expert data is broken into the following tabs: **Main, Corporate Jobs, JAs, Payments, Prices, Account, Files, Info, Calendar.**

The **Corporate Experts: Prices** window provides access to a general list of tariffs for corporate expert services. Here you can define a specific price in a specific currency for each service.

Corporate Jobs window displays the list of all jobs created for in-house experts. With the help of this window you can have a quick overview of all corporate job statuses, calculate corporate job totals, edit and delete corporate jobs.

Corporate Experts: Job Assignments window displays the list of all currently issued job assignments to all corporate experts. Here you can edit existing JAs.

The **Corporate Experts: Payments** window lists all of the payments sent to all corporate experts. Use this window to calculate payment totals, link payments with job assignments, and edit existing payments.

The **Corporate Accounts** window displays a simplified balance sheet broken into entries for each corporate expert and based on job assignments and payments to corporate experts. Accounting staff can use this window to identify which accounts require attention. Can be viewed in the Base Currency or Expert Currencies.

Corporate Expenses window can be used to make and view entries about any expenses that are not concerned with paying in-house and freelance experts.

Freelancers group of icons

The **Freelancer** window displays a list of freelance experts and consolidated information about the selected freelancer. Freelance expert data is broken into the following tabs: **Main, Application, Prices, Quotes, Freelance Jobs, POs, Payments, Account, Files, Info, Calendar.**

The **Freelancers: Prices** window provides access to a general list of tariffs for freelance expert services. Here you can define a specific price in a specific currency for each service. This list also appears in the **Applicants: Prices** window.

The **Freelancers: Quotes** window displays a list of all quotes from freelance experts stored in the database.

Freelance Jobs window displays the list of all jobs created for freelance experts. With the help of this window you can have a quick overview of all freelance job statuses, calculate freelance job totals and edit existing freelance jobs.

Freelancers: POs window displays all currently issued purchase orders for freelance jobs. Here you can edit existing POs and use the Mass PO function.

Freelancers: Payments window lists all payments sent to all freelancers. Use this window to calculate payment totals, link payments with purchase orders, edit and delete payments.

The **Freelancer Accounts** window displays a simplified balance sheet broken into entries for each freelancer and based on purchase orders and payments to freelancers. Accounting staff can use this window to identify which accounts require attention. Can be viewed in Base Currency or Expert Currencies.

2.2   Basic Interface Options

Majority of data in Projetex is displayed in the form of various tables. Each of these tables can be customized by adding or removing columns, changing their order, sorting, grouping, and applying data filters.

Sorting records

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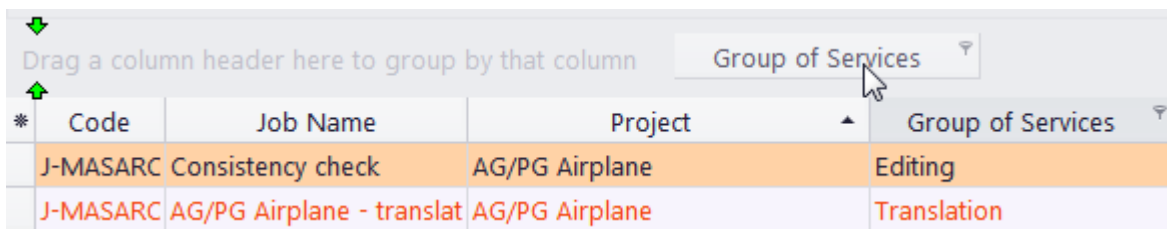
- If you want to sort your table by certain column, left-click the heading in the table.
- The order of sorting direction is shown as a triangle arrow near the column caption.
- If you click the same column caption one more time, the order of sorting will be reversed:

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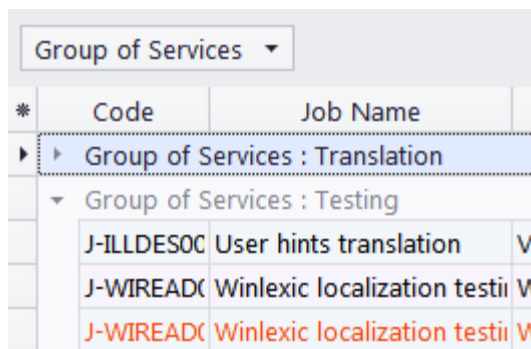
In addition to traditional sorting, records in Projetex tables can also be grouped. This is especially useful if you want to look at records that have specific values in specific fields.

To group a table by a certain column, drag that column's header into the Group Box.
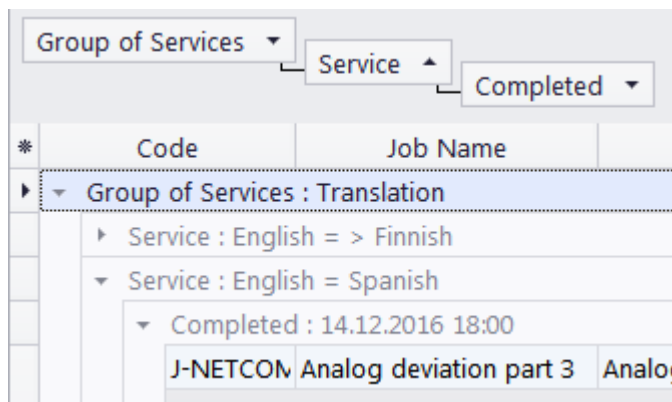
The table will be displayed as a list of Groups (values of the column). You can click a Group to expand or collapse it.

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.

2.3   Local Filter (Find Panel)

All Tables in Projetex 3D can be searched for specific strings of characters with

the Find Panel local search function.

Enter the string to search for into the field and click **Find**.

The table will now display only the records which contain that string, and highlight

the string in question.

Click **Clear**, and the table will display all records again..

2.4   Folder Navigation in Projetex 3D Workstation

Expert Folders (Corporate and Freelance)

Corporate experts' folders are created in *Corporate* folder (*Business\Experts\Corporate*), freelancers' folders — in *Freelance* folder (*Business\Experts\Freelance*).

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:

- Prices
- JAs
- Payments

In *Freelance Expert's* folder:

- Quotes
- Prices
- POs
- Payments

 Note: When a PO/JA is saved using RTF template, the 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**.

Contextual Menu

When a user right-clicks on files or folders in **Files** tab, **Contextual Menu** is called. It has the following options:

```
Open
System Menu
🔺 Upload
   Upload and Unlock
🔻 Download
🔒 Lock
   Break Lock
🔓 Unlock
   Download version...
   Cut
   Copy
   Paste
   New Folder
   Rename
   Delete
```

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.

3 Corporate Team

3.1 Corporate Expert Window

Corporate Expert window can be used to view, edit and enter new information about your in-house (corporate) translators team, as well as to manage *corporate jobs*, *job assignments* and *files* of *corporate experts*.

To open **Corporate Expert** window click **Corporate Expert** icon from the **Corporate Team** tab of the **Navigation** panel.

Corporate Expert Window tabs

Different tabs of corporate expert window represent different data, relevant to certain corporate experts. Corporate expert data is broken by the following corporate expert window tabs:

Main tab — contains the list of your corporate experts and their profiles.

Corporate Jobs tab — gives an overview of corporate jobs assigned to selected corporate expert.

JAs tab — is used for managing job assignments (*JAs*) for selected corporate expert.

Payments tab — holds information on payments made to the currently selected corporate expert.

Prices tab — is used to create, edit and check the personal price list of the currently selected corporate expert.

Account tab — provides a basic overview of the selected expert's financial account.

Files tab — provides quick access to selected corporate expert's folder, as well as to other files related to this expert.

Info tab — this tab is used for creating various notes, related to the selected corporate expert.

Calendar tab — gives a schematic overview of corporate jobs assigned to the current corporate expert.

3.2 Main Tab of Corporate Expert Window

Profiles of all the corporate experts in database can be viewed and managed with the help of **Main** tab of **Corporate Expert** window.

Browsing corporate experts

You can search for specific experts using the Find panel. Enter a few characters from the expert's name, or any other column displayed in the table, and the table will show only the entries that contain the characters.

Select any expert in the list to view the expert's profile to the right.

Once a new expert has been added, their data can be edited in the expert profile.

Each expert can have a flag assigned to him/her. An expert's flag can be changed by right-clicking the entry and choosing the flag.

Experts are listed in table form. You can change the columns displayed in the table by using the Customize Columns option.

🖐 **Note**: Only users with access to Projetex Server Administrator can add or remove custom fields.

Expert profile

Expert Code — This code is used in corporate job codes and job assignments codes of this expert. Corporate expert code can be 15 characters long maximum.

Name — corporate expert's name appears in expert chooser dialogs. This name can be maximum 150 characters long.

Contact Info — in addition to general contact details, experts photo can also be added.

Next codes — click this button to advance the automatic counters for expert-specific codes of *corporate jobs* and *job assignments*. Projetex will use these codes for next corporate job and job assignment you create. You can only increase the next code value.

Click **AHC** button to enter/change *Average Hourly Cost* of the selected expert. *AHC* will be used to calculate the *Total cost* of corporate jobs performed by this expert.

Expert currency — select the currency of this particular expert. The expert's currency will be used in all documentation for this expert. The totals of jobs will also be indicated in the expert currency. General accounting data on experts will be presented in your base currency, according to the defined exchange rates.

Expert Folder — this part of the expert profile is automatically created when with a new expert profile. The location of the expert folder will depend on the location of the Business folder. Clicking the button on the right side of the field will open the folder in the Projetex 3D Explorer. Corporate experts will be able to access only this folder (provided proper folder access options have been set up).

FTP Connections — you can set parameters for access to FTP folders of this expert. Shortcuts to these folders will be automatically added to **Files** tab of this expert's window.

General Information — expert profile may contain any general information, relevant to this expert in the form of a plain text note.

Stats — this tab shows the corporate expert's total experience in terms of the total volume in base units (words by default) of all the expert's completed jobs. Small or large stars can be displayed, each star representing a specific number of base units, giving a graphical representation of the expert's experience.

Levels — in this tab, the Project manager can assign special ranks/levels to a corporate expert. The tab is a table, with each rank in it showing its assignment date, its name, and the assigning Project Manager.

Custom fields of Corporate Experts

Use **Custom Fields** tab, next to the **Expert Profile** tab to access the controls for any **Custom Fields** of **Corporate Experts**, created with the help of Projetex Server Administrator.

Audit

The Audit tab keeps track of when and by whom the selected expert's profile was created or modified.

3.3 Contact Information of Expert

General contact information of expert contains the following fields:

Photo — an image file can be maximum 70x70 pixels. Click the frame to either Load a photo from a file or click Assign from Camera to take a picture with a camera connected to your machine. The following formats can be used: .JPG, .JPEG, .BMP (bitmap), .GIF (Graphics Interchange Format).

E-mail (up to 2) — maximum 250 characters. **Send** button becomes active only if valid e-mail address is entered.

Phone (up to 4) and **Fax** numbers — maximum 250 characters each.

3.4 Assign Next Expert Codes

Codes of *corporate jobs* and *job assignments* are generated automatically each time a new corporate job or job assignment is entered into database. Prefix of these codes depends on the name of the expert. The digits after represent the counter value.

Although this code cannot be edited, you can advance the counter forward by specifying a next code in **Next Codes for Corporate Expert** window.

The maximum value of the next code that can be entered in **Next Codes for Client** window is 999999. There is no technical limit to the maximum value the counter can reach.

To open **Next Codes for Corporate Expert** window, click **Next Codes** button in this expert's profile.

3.5 Expert FTP connections

FTP (File Transfer Protocol) is common method of sharing and exchanging work files. Each expert profile in Projetex can have a number of FTP connections (addresses of shared folders) associated with this client. These folders can then quickly be accessed by any user working with Files tab of this Client.

FTP Connection in Projetex can be used for quick access to specified FTP folder without having to re-type login and password each time you connect. The following details can be specified when creating connection:

Connection Name — this name has no syntax requirements and can be no longer than 50 characters.

FTP Server — address of FTP server (for example *ftp.server.com*). Can be no longer than 50 characters.

User Name — login, normally issued by FTP server administrator. This login will be used when Projetex attempts to connect to FTP. Can be no longer than 50 characters.

Password — This password will be used when Projetex attempts to connect to FTP. Password can be no longer than 108 characters long. To ensure security, once entered, a password cannot be copied to clipboard from the **Password** field.

Passive file transfer option enables passive mode for this connection. Consult *FTP server administrator* regarding the type of file transfer you should use. If you are unsure, leave **Passive file transfer** check box empty.

Enable **FTP over SSL/TLS** if the connection supports encryption. Consult your FTP server administrator as to whether you should use this option.

The **Keep connection alive** option sets whether Projetex should continue trying to connect to a non-responding FTP address. If this option is enabled, you can also set the interval between connection attempts.

To add, edit or delete FTP connections of certain corporate expert, click **FTP Connections** button in this expert's profile.

3.6 Corporate Jobs Tab of Corporate Expert Window

On the **Corporate Jobs** tab you can view and edit all corporate jobs which have been assigned to a currently selected corporate expert.

Filtering corporate jobs

Use **Status** filter drop-down list to display only *completed*, *not completed*, *overdue*, etc. corporate jobs.

Use **JA Issued** filter drop-down list you can select to display only those corporate jobs which have or have not been included into job assignments to in-house experts.

The **Project Manager** filter drop-down list allows you to select to view only jobs managed by a particular Project Manager.

Corporate Jobs statuses

Just like on **Corporate Jobs** tab of **Project** window, in **Corporate Expert** window corporate jobs are marked with color:

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

Blue — the job is not completed and due today.

Red — the job is not completed and overdue.

Black — the job is completed.

 Note: You can change colors on the **Colors: Status** tab of the **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.

To edit the **Job** record, select it from the list and click **Edit** button, or double-click this job in the list.

3.7   JAs Tab of Corporate Expert Window

JAs tab of **Corporate Expert** window contains the list of job assignments (*JAs*), issued to currently selected corporate expert.

Click **Approved** drop-down list to filter only approved or not approved JAs.

The **Project Manager** filter drop-down list allows you to select to view only JAs for a job managed by a particular Project Manager.

🔸 **Note: JAs** can be created and deleted on the **JAs** tab of **Project** window.
🔸

3.8   Payments Tab of Corporate Expert Window

The Payments tab of the Corporate Expert window displays records of payments to the currently selected expert.

The New button opens the New Corporate Expert Payment window, where a new payment can be created.

The Edit button opens the Edit Corporate Expert Payment window, where the details of the currently selected corporate expert payment can be edited.

The Delete button deletes the currently selected corporate expert payment.

Use the Status drop-down list to display only payments which are still to be linked with JAs, or only the fully linked ones.

Payments to corporate experts can be linked to job assignments, fully or partially. If the sum of the linked payment values matches the JA total, this Job Assignment is considered "settled". Payments are also added to the company expenses on the Account tabs.

By default, payment values are displayed in the expert's currency. Use the Customize columns option to configure which payment data must be displayed.

3.9   Prices Tab of Corporate Expert Window

In addition to their AHC, each Corporate expert in Projetex can have a set of individual prices for particular jobs. These prices can be assigned on the Prices tab of the **Corporate Expert** window. An individual expert's price list is maintained in the expert's currency. Only one price per group of services, service and unit combination can exist in the individual price-list.

The **New** button opens the New Price window, where the details of a new price can be added.

The **Edit** button opens the Edit Price window, where the details of the currently selected price can be edited.

The **Delete** button deletes the currently selected price.

RTF Templates: | Prices of Single Corporate Expert - Template - English.rtf
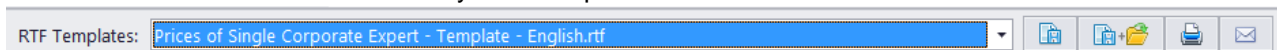
You can print the expert's price list or save it in a text file by selecting the template and clicking the **Save, Save & Open** or **Print** buttons at the bottom of the Prices tab.

You can also click the **Send Mail** button to open the Projetex Mail Sender and send it to the expert's E-mail address as an attachment.

To configure price list templates in the **Backstage** view, click **Corporate Settings**, then click Templates. Templates for prices are stored in the D:\BusinessServer\Templates\EXPERTS\CORPORATE\Prices\ folder.

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

3.10   Account Tab of Corporate Expert Window

The Account tab of the Corporate Expert window displays a brief summary of the selected corporate expert's accounts.

This balance includes the total of job assignments issued to this expert, the total of payments paid to this expert, and the account balance (total JAs minus total payments).

The pie diagram represents the share of this corporate expert in the overall number of job assignments issued to all corporate experts.
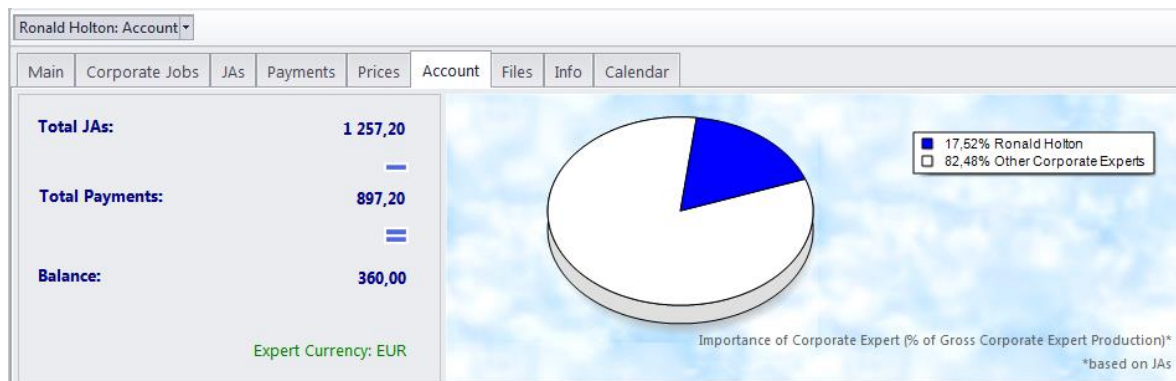
3.11   Files Tab of Corporate Expert Window

Files tab of the **Corporate Expert** window can be used to create and access expert folder of required corporate expert, and work with this expert's files. Use this tab to create, view and search for work files and folders related to the selected expert (for example, you can quickly locate and access the files of a certain job assignment)
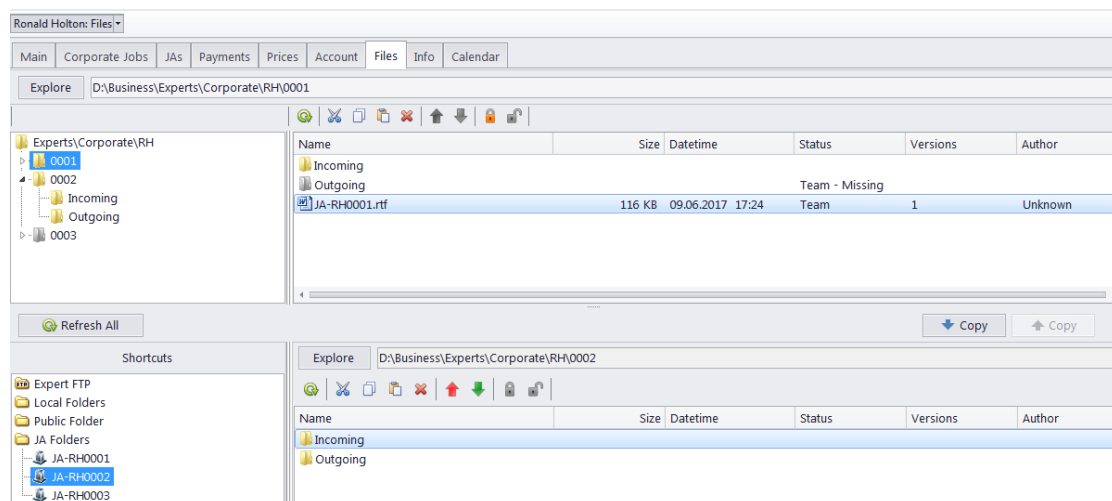
The main file manager window consists of two horizontal panes. The upper pane shows the expert folder and the content of the currently selected sub-folder. The lower pane allows to open shortcuts. Clicking any of the **Shortcuts** options will create a second file view field to the right, and open the appropriate folder there. This allows to simultaneously work with two opened folders in the same window.

Files between expert folder and external resources (local folders, FTP) can be exchanged using **Copy** buttons.

⬆ Copy - is used to copy file from path currently opened in Shortcuts pane to expert folder

⬇ Copy - is used to copy file from expert folder to path currently opened in Shortcuts pane.

Context menu contains the following specific file operations:

Open command opens the file in appropriate application

Upload command uploads the file from local *Business* folder to *BusinessServer* folder on Projetex Server Administrator PC.

Download can be used to download the file *BusinessServer* folder on Projetex Server Administrator PC to *Business* folder on Workstation PC.

Download version opens window that contains information about all versions of particular files.

Each file can have one of the following statuses:

Team - the files stored in *BusinessServer* 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 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).

3.12   Info Tab of Corporate Expert Window

Info tab of the **Corporate Expert** window can be used to enter any optional additional information relevant to the selected corporate expert in plain text format. These notes will be available for all project managers.

Each note can have the following attributes:

Subject — can be maximum 100 characters long.

Category — to add more categories of notes, in the **Backstage** view, click **User Settings**, then click **Categories**.

Information — plain text note, any number of characters long.

Notes can be filtered by **Subject** or by **Category** columns.

3.13   Calendar Tab of Corporate Expert Window

This tab provides a project manager with visual representation of job processes of a certain corporate expert in a form of calendars.

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*.

3.14   Job Assignments Window

Job Assignments window lists all *job assignments* issued to all of the *corporate experts*.

Click **Approved** drop-down list to view only JAs which were approved or not approved by project managers.

The **Project Manager** filter drop-down list allows you to select to view only JAs managed by a particular Project Manager.

Note: JAs can be created and deleted on the JAs tab of **Project** window.

3.15   Corporate Expenses Window

Any *expenses* other than *payments to freelancers* and *corporate jobs total cost* can be entered into database with the help of **Corporate Expenses** window. These expenses are used when calculating balance of projects.

To open the **Corporate Expenses** window click on the **Corporate Expenses** icon in the **Corporate Team** section of **Navigation** panel.

Corporate expense record contains default fields:

Date - the date when the expense was handled

Value - value of the corporate expense

Description - any additional information about the expense

4 Freelancers

4.1 Freelancer Window

Freelancer window can be used to effectively keep track on freelancers and their activities, update and search through your freelancer database, as well as to manage *freelance jobs*, *job assignments* and *files* of freelance experts.

To open **Freelancer** window click **Freelancer** icon from the **Freelancers** tab of the **Navigation** panel.

Freelancer Window tabs

Different tabs of **Freelancer** window represent different data, relevant to certain freelancers in your database. All data of freelancers is broken by the following tabs of the **Freelancer** window:

- **Main** tab — contains the *list of your freelancers* and their *profiles*. Here new freelancers can be entered into database.
- **Application** tab — contains application information of selected freelancer, added by HR staff.
- **Prices** tab — is used to enter and check price information of currently selected freelancer. Here prices of this freelancer can be created and edited.
- **Quotes** tab — contains quotation information, received from the currently selected freelancer.
- **Freelance Jobs** tab — gives an overview of freelance jobs assigned to selected freelancer.
- **POs** tab — is used for managing purchase orders (POs) for selected freelancer.
- **Payments** tab — holds information on payments made to the currently selected freelancer.
- **Account** tab — provides basic overview of the financial account of selected freelancer.
- **Files** tab — provides quick access for selected freelancer's folder, as well as to other files related to this freelancer.
- **Info** tab — this tab is used for creating various notes related to the selected freelance expert.
- **Calendar** tab — gives a schematic overview of freelance jobs, presented in a form of **Calendars**.

4.2 Main Tab of Freelancer Window

Main tab of **Freelancer** window contains information of your freelance experts. You can add new freelancer records here or edit existing ones. The two primary areas of **Main** tab of the **Freelance Expert** window are *freelancers list* and *freelancer profile*.

Browsing Freelancers

You can search for specific freelancers by using the **Find panel**. Enter a few characters from the freelancer's name, or any other column displayed in the table, and the table will show only the entries that contain the characters.

To search for freelancers by price, service, country, or completed jobs, click the **Search** button.

Click on any freelancer in the list to view their profile to the right.

Once a new freelancer has been added to the database, his or her profile can be edited at any time.

If you no longer actively work with a particular freelancer, you can change them into an applicant by clicking "Move to applicants".

Each freelancer can have a flag assigned to him/her. A freelancer's flag can be changed by right-clicking the entry and choosing the flag.

Freelancers are listed in the form of a table. You can change the columns displayed in the table by using the Customize Columns option.

Freelancer profile

Profile of the currently selected freelancer can be viewed to the right.

Expert code — This code will be used in document (purchase order, quote) codes of this freelancer. Expert code will also be used as folder name of this freelancer's folder.

Name — Use this option to enter or edit the name of the currently selected freelancer. Freelancer's name can be no longer than 150 characters.

Postal Address — Enter address information of the currently selected freelancer. This information will be automatically inserted in the text of this freelancer's documents.

Contact info — Click this button to enter additional contact information on this freelancer.

Web-site — opens the **Edit Web Links** dialog box, providing fields for entering a web site address (URL), as well as the LinkedIn, Facebook, and Twitter accounts of the freelancer. Click the address or the social media icons to open the corresponding links in your Internet browser.

Payment Terms — You can set specific payment terms to each of your freelancers. Payment terms settings will determine when the purchase orders of this freelancer become *outstanding* and *overdue*.

VAT number — Regulations in some countries may require to indicate VAT codes (or numbers) in financial documents. Freelancer's VAT number, entered in freelancer's profile can be automatically displayed in this freelancer's printable documents.

Expert currency — Select currency of this particular expert. Expert's currency will be used in all documents of this freelancer. The totals of jobs will also be indicated in expert currency. General accounting data on experts will be presented in your *base currency*, according to defined *exchange rates*.

Expert Status — Set the freelancer's availability status as Active, Inactive, or Potential.

Next codes — You can advance the code counters of *freelancer quote*, *freelance job*, *purchase order*, and *payment to freelancer*.

Locale format — Adjust these settings to make all documents, printed for the selected freelancer use individual locale format, specific to this freelancer.

Expert folder — a freelancer's folder contains exported jobs, purchase orders, payments, prices and quotes of the freelancer as well as any other related files. Projetex automatically creates, updates and maintains links between freelance experts in database and their folders. A freelancer's expert code is used as the folder name. The folder is created automatically and its location in the Business folder is displayed in the Expert folder field. Click the folder button on the right side of the field to open this folder in the Projetex 3D explorer.

FTP Connections — you can set parameters for access to FTP folders of this freelancer. Shortcuts to these folders will be automatically added to **Files** tab of this expert's window.
General Information — freelancer's profile can contain any general information, relevant to this freelancer in a form of plain text note.

Custom data of Freelancer

Client database can be customized by adding custom fields. Any custom fields that have been added to clients database can be accessed by clicking **Custom** tab next to the **Client Profile** tab.

Note: Only users with access to Projetex Server Administrator can add or remove custom fields.

4.3 Postal address of freelancer

Postal address of freelancer determines this freelancer's country of residence, and is automatically added to purchase orders, as well as to quotes of this freelancer. The following postal address data can be added:

Street Address — two separate addresses, can be added. Each address entry can be 50 characters maximum. When editing invoice and quote templates you can choose which of the two addresses invoice or quote should contain.

City — can be maximum 40 characters long.

State — maximum 40 characters long.

Country — you can add additional countries to the list of countries in the **Edit Postal Address** window. See Countries topic for details.

ZIP Code — maximum 10 characters long.

Time Zone — the Freelancer's time zone is set automatically when you select their country, but you can change the time zone manually as well.

4.4 General Contact Information of freelancer

Photo — an image file with a maximum of 70x70 pixels. Click the frame to either **Load** a photo from a file or click **Assign from Camera** to take a picture with a camera connected to your machine. The following formats can be used: .JPG, .JPEG, .BMP (bitmap), .GIF (Graphics Interchange Format).

E-mail (up to 2) — maximum 250 characters. The **Send** button becomes active only if a valid e-mail address is entered.

Phone (up to 4) and Fax numbers — maximum 250 characters each**.**

4.5 Payment Terms of Freelancer

According to the payment terms of a freelancer, Projetex will keep track of unpaid POs and update status of outstanding purchase orders, making them overdue, due today, due tomorrow, and so on.

Through the **Edit Payment Terms** dialog you can configure the payment conditions of the selected freelancer, including:

The **Minimum Fee** — this is the minimum sum the POs must accumulate, before they can be paid. Type 0 in this field to disable the Minimum Fee condition. You can also indicate if a PO should be paid within a certain time (30, 45, 60, or 90 days) from the day it was sent (PO issue date) or

completed (PO completion date), within a certain time of the day the linked job was invoiced (From invoice date), or on a certain day of a certain month.

Select **Unknown/Other** to disable automatic payment terms control.

Additional Notes — a plain text note, not limited by the number of characters.

4.6   Locale Format of Freelancer

Freelancers from different countries are very likely to have different locale formats. There is no need to change your own locale format each time you print purchase order for a freelancer, with locale format differs from yours.

To print purchase orders to freelancers according to their own *Regional and Language options* (defined in *Windows Control Panel*), Projetex can use separate locale format for each of your freelancers.

The following locale settings can be configured:

Negative Currency Format — these settings determine how negative amounts of money are displayed. For example, in some countries negative amount is indicated with a "minus" symbol put before number: -100.00. In other countries negative amount must be written in brackets: (100.00).

Decimal Symbol — this is the character which separates decimals. You can type the required character directly into the drop-down list. Any character you type will be added to the list for later use.

No. of digits after Decimal — Projetex will round up all numbers in the documents to a number of decimals specified here. Set this parameter to 0 if the currency of a freelancer does not have decimal units.

Digit Grouping Symbol — this is the symbol which will be inserted between each three digits in the number, for example in the following number *1 000 000* digit grouping symbol is space.

Date Separator — enter character to delimit day, month and year in date when it is displayed in short format. For example in the following date *3,31,2008* the date separator character is comma. Settings in **Date Separator** field will be automatically applied to **Short Date Format** field.

Short Date Format — this is format for the short date display (like *3,31,2008*). Enter required date format into this field or select one of the available formats using drop-down list. Use *d* to indicate day, *m* – for month, and *y* – for year. For example *dd.mm.yy* will result in date like *01.02.09*. Date separator characters can be entered manually in this field too. Otherwise — settings from **Date Separator** field will be applied.

Long Date Format — these settings configure the display long date (like *Monday, March 31, 2008*). Use four *d* character to map day of the week full name, four *m* characters — to map full month name, and *y* to map complete year.

Note: To map brief day or month ("*Mon*" instead of "*Monday*" or "*Mar*" instead of "*March*") enter 3 d or 3 m characters instead of four.

Note: Full day or month names can be displayed in short date format by typing 3 or 4 characters in **Short Date Format** field.

To configure locale settings for certain freelancer, click **Locale Format** button in this freelancer's profile and choose **Custom Values** from **Generation of RTF files** drop-down list.

4.7   Next Codes of Freelancer

Codes of *freelancer quotes*, *freelance jobs*, *purchase orders* and *payments* are generated automatically each time a new quote, freelance job, payment or PO is entered into database. Prefix of these codes depends on freelancer's name. The digits after — represent the counter code.

Although this code cannot be edited, you can advance the counter forward by specifying next code in the **Next Codes for Freelancer** window.

The maximum value of the next code that can be entered in **Next Codes for Freelancer** window is 999999. There is no technical limit to the maximum value the counter can reach.

To open **Next Codes for Freelancer** window click **Next Codes** button in this freelancer's profile.

4.8   Freelancer FTP connections

FTP (File Transfer Protocol) is a common method of sharing and exchanging work files. Each freelancer profile in Projetex can have a number of FTP connections (addresses of shared folders) associated with this freelancer. These folders can then quickly be accessed by any user working with the Files tab of this freelancer.

The FTP Connection in Projetex allows quick access to specified FTP folder without having to re-type login and password each time you connect. The following details can be specified when creating a connection:

- **Connection Name** — this name has no syntax requirements and can be no longer than 50 characters.
- **FTP Server** — address of FTP server (for example ftp.server.com). Can be no longer than 50 characters. You can also specify which Port to use.
- **User Name** — login, normally issued by FTP server administrator. This login will be used when Projetex attempts to connect to FTP. Can be no longer than 50 characters.
- **Password** — this password will be used when Projetex attempts to connect to FTP. Can be no longer than 50 characters.
- **Passive file transfer** option allows to enable passive mode for this connection. Consult FTP server administrator regarding the type of file transfer you should use. If you are unsure, you can leave Passive file transfer check box empty.
- **FTP over SSL/TLS** to set if the connection supports encryption. Consult FTP server administrator as to whether you should use this option.
- **Keep connection** alive sets whether Projetex should continue trying to connect to a non-responding FTP address. If this option is enabled, you can also set the interval between connection attempts.

To add edit or delete FTP connections of certain freelancer, click FTP Connections button in this freelancer's profile.

4.9 Application Tab of Freelancer Window

Application tab of the **Freelancer** window can be used to enter recruiting information of this freelancer, employment history and other HR data. Project managers can also check this tab to view any additional information on freelancer before assigning him or her to a freelance job.

Click **Application Notes** button to enter general notes about this freelancer's application.

Application Tracker can be used to enter records about certain events (i.e. interviews, and so on.) which occurred on certain date. Application tracker can contain any number of records, each having a **Date**, **Subject** (250 characters maximum) and **Description** (plain text note with no length limitation). **Date** and **Subject** fields of a record cannot be empty.

Records in application tracker can be sorted by **Date** or by **Subject**.

4.10 Prices Tab of Freelancer Window

Each freelancer in Projetex can have a set of prices individual to this particular freelancer. These prices can be assigned on the **Prices** tab of **Freelancer** window. Individual freelancer price list is maintained in *freelancer's currency*. Only one price per group of services, service and unit combination can exist in individual price-list.

You can print freelancer's price list or save it in a text file by selecting the template and clicking **Save**, **Save & Open** or **Print** buttons at the bottom of **Prices** tab of **Freelancer** window.

To configure price list templates on the **Settings** menu click **Corporate** command, then click **Templates**. Templates for prices are stored in *D:\BusinessServer\Templates\EXPERTS\FREELANCE\Prices* folder.

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

4.11 Quotes Tab of Freelancer Window

Quotes tab of **Freelancer** window can be used to account quotes of this freelancer. To view the list of freelancer's quotes, open **Freelancer** window and switch to **Quotes** tab.

Freelancer Quote Controls

Quote management buttons are located on the left side of **Quotes** tab of **Freelancer** window.

New Quote button opens **New Freelance Quote** window, where details of a new freelancer quote can be added.

Edit button opens **Edit Freelancer Quote** window, where details of currently selected quote can be edited.

Delete button deletes currently selected quote.

Status drop-down list can be used to display only the quotes with a certain status.

Freelancer Quote Status

A quote can have one of the following statuses: Unknown, Accepted and Rejected. Depending on its current status, the quote will be marked with different color in the quotes list:

Blue — for unknown quote status.

Green — for accepted quote status.

Red — for rejected quote status.

Purple — for received or corrected status

Note: You can change colors on the **Colors: Status tab** of the **Current User Settings**.

4.12 Freelance Jobs Tab of Freelancer Window

Freelance Jobs tab displays all jobs of the currently selected freelancer. New jobs cannot be created from this tab, however, existing ones can be edited.

Filtering Freelance Jobs

Using **Status** drop-down list you can choose to filter only jobs with a particular status, like *vacant*, *not completed*, *due today* and so on.

Using **PO Issued** drop-down list you can set Projetex to display only jobs for which purchase order has been or has not bee issued, or free jobs.

The **Project Manager** filter drop-down list allows you to view only jobs managed by a particular Project Manager

Freelance Jobs statuses

Freelance jobs are displayed in different colors, depending on their completion statuses:

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

Blue — the job is not completed and due today.

Red — the job is not completed and overdue.

Black — the job is completed.

Note: You can change colors on the **Colors: Status** tab of the **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.

4.13 POs Tab of Freelancer Window

Use **Purchase Orders** tab to view purchase orders issued to currently selected freelancer. New purchase orders cannot be created from this tab, however, existing ones can be edited.

PO Statuses

Purchase order statuses change depending on your payment terms to freelancers and your payment to freelancers linked to purchase orders.

Green — purchase order is *outstanding* and is expected *to be paid soon*.

Blue — purchase order is *outstanding* and is expected *to be paid today*.

Red — purchase order is *outstanding* and its *payment is overdue*.

Pink — the purchase order is *not invoiced*.

Black — purchase order has been *settled* (paid).

Note: You can change colors on the **Colors: Status tab** of the **Current User Settings**.

Projetex automatically assigns statuses to POs depending on each freelancer's payment terms.

Filtering POs

Use **Status** drop-down list to filter out only those **Purchase Orders** which have selected status.

Use **Approved** drop-down list to filter out those **POs** which have or have not been approved by project managers.

Note: POs can be created and deleted in **POs** tab of **Project** window.

4.14 Payments Tab of Freelancer Window

Payments tab of the **Freelancer** window displays records of payments to currently selected freelancer.

Payments to freelancers can be linked to purchase orders, fully or partially. If the sum of linked payment values, matches *PO total*, this purchase order is considered "settled". Payments are also added to company expenses on **Balance** tabs.

By default payments values are displayed in freelancer currency. Right-click the table and click **Customize columns** option to configure which payment data must be displayed.

Use **Status** drop-down list to display only payments which are still to be linked with POs, or only those, which whole amounts have been linked with POs.

4.15 Account Tab of Freelancer Window

Account tab of the **Freelancer** window displays a brief summary of selected freelancer's accounts.

This balance includes *total of purchase orders*, issued to this freelancer, *total of payments*, paid to this freelancer, and *account balance* (total POs minus total payments).

The pie diagram represents the share of this freelancer in overall purchase orders issued to all freelancers.

4.16 Files Tab of Freelancer Window

Files tab of the **Freelance Expert** window can be used to create an expert folder with one click, create, view and search for files and folders related to this expert. This tab can also be used to access remote FTP folders.
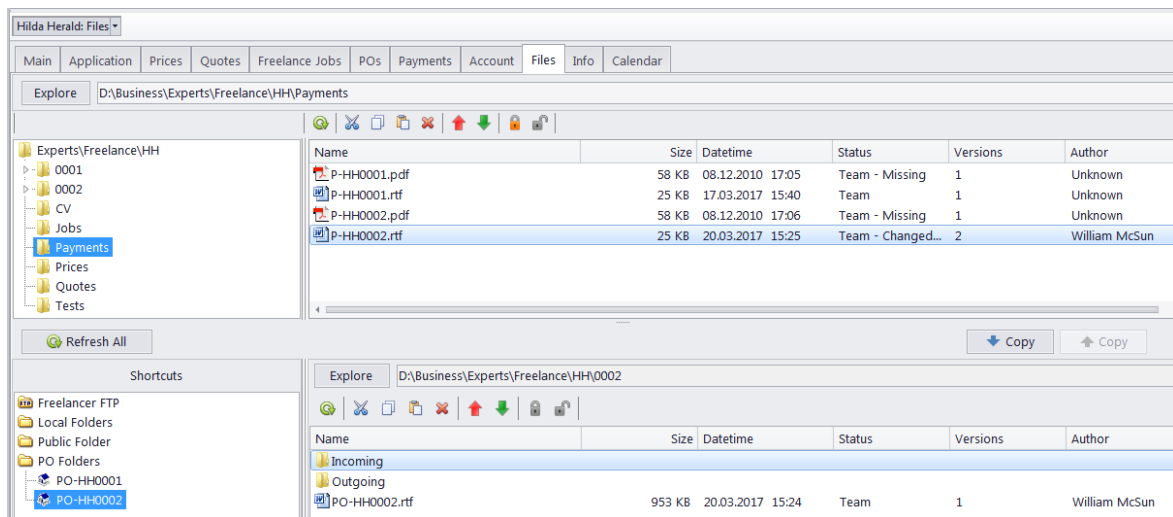
Window contains two horizontal panes. Upper pane shows the folder tree for selected freelancer's folder and content of the currently selected subfolder. Pane underneath allows to open shortcuts.

Clicking any of the **Shortcuts** 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.

Files between freelancer folder and external resources (local folders, FTP) can be exchanged through **Copy** buttons.

⬆ Copy - is used to copy file from path currently opened in Shortcuts pane to freelancer folder .

⬇ Copy - is used to copy file from freelancer folder to path currently opened in Shortcuts pane.

Context menu contains the following specific file operations:

Open command opens the file in the appropriate application

Upload command uploads the file from local *Business* folder to *BusinessServer* folder on Projetex Server Administrator PC.

Download can be used to download the file *BusinessServer* folder on Projetex Server Administrator PC to *Business* folder on Workstation PC.

Download version opens window that contains information about all versions of particular files.

Each file can have one of the following statuses:

Team - the files stored in *BusinessServer* folder on server and in local storage are identical.

Team - Changed on Workstation - local copy of the file has been modified, the file on server has not been updated.

Team - Changed on Server - file on the server has been modified, local copy has not been updated.

Team - Missing - file exists on the server, but has not been downloaded to 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).

4.17   Info Tab of Freelancer Window

Info tab of the **Freelancer** window can be used to enter any additional information regarding the selected freelance expert in plain text format. These notes will be available for all project managers.

Each note has the following attributes:

Subject — can be maximum 100 characters long.

Category — to add more categories of notes, in the Backstage view, click User Settings, then click Categories.

Information — plain text note, any number of characters long.

Notes can be filtered by **Subject** or by **Category** columns.

4.18   Calendar Tab of Freelancer Window

Calendar tab of the **Freelancer** window displays calendars of this expert's *freelance jobs*.

Double-click any calendar representing the freelance job 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 and drag across the mini-calendar to display a number of sequential days.

Job calendars colors

Just like the jobs they represent, job calendar bars can have different colors, depending on the statuses of respective 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.

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

Filtering

Use **Job Status** filter to display calendars of freelance jobs only with certain status, such as *vacant* (no expert assigned), *overdue*, *completed* and so on.

Use **Project Manager** filter to display calendars of freelance jobs only led by certain project managers.

4.19   Freelance Price List

Freelance Price List window contains your general *price list* for services offered by your freelancers. These prices can be used when creating freelance quotes, freelance jobs and *POs* for any freelancer in your database.

Prices from this window can be copied to any individual freelancer price list.

You can print your general freelance services price list, save it in a text file or send it via e-mail by selecting the template and clicking the **Save, Save & Open,Print,** or **Send Mail** buttons at the bottom of the window.

To configure the price list templates, in the Backstage view click Corporate Settings, then click the Templates section. Templates for prices are stored in the *D:\BusinessServer\Templates\EXPERTS\FREELANCE\Prices* folder.

4.20   Quotes from Freelancers Window

Quotes from Freelancers window provides an overview of all freelancer quotes. The options available for this window are the same as those for **Quotes** tab of **Freelancer** window. The major differences are:

* **Quotes from Freelancers** window displays all quotes from freelancers.

* New quote from freelancer cannot be created using this window.

* Existing quotes from freelancers cannot be deleted using this window.

Status filter drop-down list can be used to display only quotes with a certain status.

A quote can have one of the five statuses: Unknown, Accepted, Rejected, Received, and Corrected. Depending on its current status, the quote will be marked with different color in the quotes list:

Blue — for unknown quote status.

Green — for accepted quote status.

Red — for rejected quote status.

Purple — for received or corrected status

Note: You can change colors on the **Colors: Status tab** of the **User Settings**.

4.21   Freelance Jobs Window

All freelance jobs stored in the database are listed in the **Freelance Jobs** window. The options available for this window are the same as those for **Freelance Jobs** tab of **Project** window. The major differences are:

- **Freelance Jobs** window displays all freelance jobs of all projects.

- New freelance jobs cannot be created using this window.

- Existing freelance jobs cannot be deleted using this window.

Freelance Jobs Filters

Using **Status** drop-down list you can select to view only jobs with a particular status: *vacant*, *not completed*, *due today* and so on.

Using **PO Issued** drop-down list you can select to view only jobs for which purchase order was issued or these, for which was not issued, or free jobs.

Freelance jobs may also be filtered by *Project Manager* responsible for them.

Freelance Jobs statuses

Color of freelance jobs in the list is determined by their status. By default these are:

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

Blue — the job is not completed and due today.

Red — the job is not completed and overdue.

Black — the job is completed.

Note: You can change colors on the **Colors: Status** tab of the **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 **Optional Status** drop-down list in **Edit Job** window.

4.22   POs to Freelancers Window

POs to Freelancers window provides a general list of all purchase orders issued to all freelancers in the database. Use this window to identify currently unpaid POs, obtain a total of balance due according to all purchase orders issued, as well as to quickly issue a large amount of POs.

The options available for this window are the same as those for **POs** tab of **Freelancer** window. The major differences are:

- **POs to Freelancers** window displays all POs for all freelancers.
- New POs cannot be created using this window.
- Existing POs cannot be deleted using this window.

To create a new purchase order, open **Main** tab of **Projects** window, select required project, and click **POs** tab.

To quickly create a large number of purchase orders, click **Mass POs** button.

PO Statuses

Purchase order statuses change depending on your payment terms to freelancers and your payment to freelancers linked to purchase orders.

Green — purchase order is *outstanding* and is expected *to be paid soon*.

Blue — purchase order is *outstanding* and is expected *to be paid today*.

Red — purchase order is *outstanding* and its *payment is overdue*.

Pink — the purchase order is *not invoiced*.

Black — purchase order has been *settled* (paid).

 Note: You can change colors on the **Colors: Status tab** of the **Current User Settings**.

Projetex automatically assigns statuses to POs depending on each freelancer's payment terms.

Filtering POs

Use **Status** drop-down list to filter out only those **Purchase Orders** which have selected status.

Use **Approved** drop-down list to filter out those **POs** which have or have not been approved by project managers.

POs can also be filtered by *Project Manager* responsible for them.

4.23 Payments to Freelancers Window

Payments to Freelancers window displays all *payments* received from all *freelancers*. This window can be used to edit payments, create **Mass payments to freelancers** and calculate totals of all *Payments to Freelancers* in base currency.

Use **Status** filter drop-down list to display only payments with a particular status. Use this filter to view either the payments which are still to be linked with invoices, or only those, which whole amounts have been linked to *purchase orders*.

4.24 Freelancer Accounts Window

Freelancer accounts window presents a simplified balance sheet of your freelancers based on your payments made to freelancers and freelancer purchase orders. Accounting staff can use this window to identify freelancer's account which require attention.

Accounts can be viewed both in freelancers' currencies and your base currency: use **View** dropdown list to select a currency in which records should be displayed.

Alternatively you can right-click the table and use **Customize columns** option to add freelancer currency columns to view.

Note: To view global balance, select **Base Currency** option in **View** drop-down list.

5   Applicants

The **Applicant** window can be used to effectively keep track of freelance applicants and their activities, and update and search through your applicant database and convert the applicants into freelancers if they satisfy your requirements. The documentation of former or inactive freelancers can also be stored here.

The Applicants section offers all the same functionality as the Freelancers section, with the following exceptions:

- You can not create projects, jobs, POs or payments for applicants. The applicant must be transferred to the Freelancers table first.
- The main Applicant window does not have a Calendar tab.

To transfer an Applicant to the Freelancers section, open the main window of the Applicants section, select the required applicant and click the **Move to Freelancers** button

6   The Calendar

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.

6.1   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.

6.2   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**.

6.3   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.