System Administrator — Reference Guide

Table of Contents

1 Database Platform

MS SQL Database Server

Projetex 3D uses the MS SQL Express Relational Database Server as its 'heart', which powers Projetex 3D database.

What does it mean for you?

Using Projetex 3D does not require any knowledge of inside workings of MS SQL Database Server. All database set up and maintenance tasks can be easily performed using Projetex 3D Server Administrator.
However, if you would like to gain deeper understanding of capabilities of MS SQL Server
you can read more about MS SQL on the following website:

https://social.msdn.microsoft.com/Forums/sqlserver/en-US/home?forum=sqlexpress

2　System Requirements

Server Requirements

Tests show that Projetex 3D Server can be successfully installed in the following environments:

Hardware and Software	Requirements/Supported
Operating System	Windows 7 Windows 8 Windows 8.1 Windows 10 Windows server 2008 Windows Server 2012
CPU	1200Mhz or higher
Memory	2GB or more
Hard Disk Space for Setup	2,5GB
Hard Disk Space for Operation	3GB
Other	A LAN, VPN, or Internet connection to connect to your Projetex Server remotely. To install Projetex 3D Server the computer must be MS SQL SERVER EXPRESS 2014 - ready. IMPORTANT: Projetex 3D Server should not be installed onto domain controllers. Such a configuration is strictly not recommended due to security precautions.

Note: It is important to have enough space for database (at least 300–400 MB at any given moment) so that it grows naturally without any problems and errors due to insufficient hard drive space.

3 Server and Database Operations

3.1 Starting and Stopping Database Server

Microsoft SQL Database Server is a database engine which should be up and running in order for the Projetex database to function. Though in some cases you may need to stop the Microsoft SQL Server temporarily.

You can start/stop the Microsoft SQL Database Server from the **Database Server** tab of the Projetex Server Administrator.

When Database Server is stopped, database operations are not accessible. No Projetex Workstations can connect to the database, and the set of Projetex System Administrator features is limited to the **Database Server** tab.

Stopping the Server

The following procedures may require stopping Microsoft SQL Server.

- *Manual backup*. When Microsoft SQL Database Server is stopped, it is safe to copy projetex3D.mdf database file to another location by means of Windows® Explorer. Resort to this kind of backup only in cases when regular backup does not work for some reason. In all other cases regular Backup command does its job well without need to switch database into offline mode or stop Microsoft SQL Database Server.

- *Manual restore*. When the server is stopped, it is safe to place a projetex3D.mdf stopped-server backup file you have made before into its original location (C:\Program Files (x86)\Microsoft SQL Server\MSSQL12.P3D\MSSQL\DATA).

- *Moving current database* away before running regular restore.

- *Upgrade* of the Microsoft SQL Database Server software. You will be notified when this upgrade would be recommended.

 Note: Stopping Microsoft SQL Database Server is a critical operation, which can result in data loss if some users are connected to the server. Always switch database into offline mode (it can be done from the **Database** tab of the Server Administrator) to ensure no Projetex Workstations are connected to the Database Server before running **Stop Server** command.

 Note: It is not recommended to install newer versions of Microsoft SQL Database Server unless there is an explicit recommendation to do this from Projetex Support. We will thoroughly test all future versions of Microsoft SQL, their proper functioning with Projetex Server and Workstation software, and will consider all pros and cons before recommending upgrade. Voluntary upgrades may cause unstable operation of Projetex.

3.2 Switching database offline or online

To change status of the database click **Go Online** or **Go Offline** button (depending on current database status) on **Database** tab of Projetex Server Administrator. Many server-level settings require the database to be in offline mode.

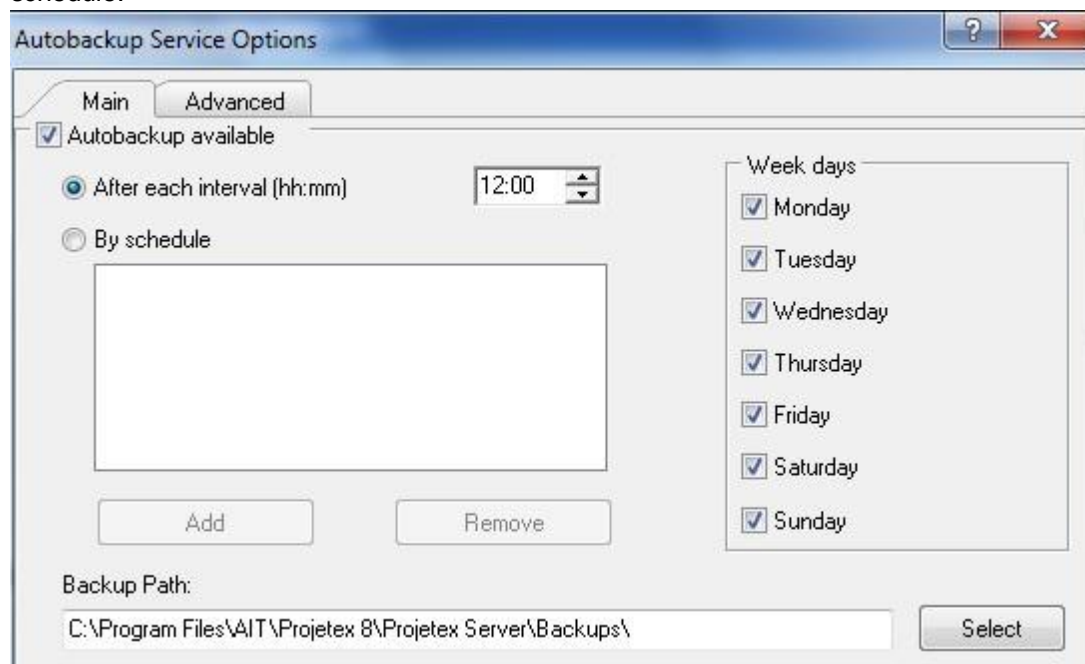The following options are available when switching database offline:

3.3 Backup

It is recommended to perform regular backups of Projetex 3D database. You can perform backup of the database at any time by clicking **Backup** button on the **Database** tab of the Projetex 3D Server Administrator.

To perform a backup operation:

1. Click **Backup** button on the **Database** tab of Projetex Server Administrator.

2. Specify the location of backup file by clicking **Select** button.

3. Enter backup file name in the **Backup File** field.

4. Click **OK** button to begin backup operation.

3.4 Autobackup Service

Autobackup engine allows to configure Projetex to back up database automatically by defined schedule.

On the **Main** tab of **Autobackup Service Options** window the following options can be configured:

o **Autobackup available -** select this check box to activate autobackup service.
o **After each interval (HH:MM)** option configures service to be run every time after given time passed since last autobackup. Maximum periodicity available is every 15 minutes.
o **By schedule** - allows you to set the backup for a specific time. Use the Add and Remove buttons to create new time rule and delete the existing ones respectively
o **Week days** block - select necessary days of the week for automatic backup
o Path to save *autobackup* files can be changed by clicking **Select** button to the right of current path and browsing for proper folder in **Select directory** dialog.

The **Advanced** tab contains the following options:

- **Cleanup old backups** block - for disk space economy system can periodically delete old backup files. Select **Enable cleanup** to switch this option on. Enter number of days after which backup files will be considered as outdated into **Cleanup backups which are older than** field.

- In **Log** block it is possible to activate autobackup log to record all automatic backup service operations. Select **Enable Log** check box to activate proper option. Logs can be recorded either within predefined period or constantly. Use **Keep logs for last N month** drop-down list to specify log record duration. Click **View Current Log...** button to browse through latest blog records.

- **ZIP** block - select **Backup as ZIP archive** to make service generate automatic backups in *ZIP* format instead of *FBK*.

3.5 Autorestart service

The Autorestart service allows you to schedule automatic daily restarts of Projetex' SQL server and/or File server, to prevent or fix certain errors.

The Autorestart window contains the following options:

The **Enable Automatic restarts** checkbox to enable/disable the service.

The number fields to set up when the window to restart the servers will be open and how long it will remain open for.

The checkboxes to individually enable/disable the SQL server and File Server restarts. By default, the restarts happen 1 minute after the restart window opens.

The **Wait until all users log out** option postpones the SQL server restart until 1 minute after there are no workstation connected to the server, as long as the restart window is open.

The **Restart Now** button will immediately restart the SQL and file servers.

3.6   Restore

Restore command is performed to restore the database which you have saved in the backup file created earlier (by running **Backup** command).

To restore your database from a backup file:

1. Turn your database offline by clicking the Go offline button.

2. Optionally, open your database folder (its address is displayed in the Projetex Database information string) and rename (or move to a different folder) your current Projetex3D.MDF file.

3. Click the Restore button on the Database tab of Projetex Server Administrator.

4. Click the Select button in the Restore Database dialog and locate required backup.bak file (by default these files are stored in C:\Program Files (x86)\Microsoft

SQL Server\MSSQL12.P3D\MSSQL\Backup) and click OK to begin the restore operation.

 Note: Projetex 3D can also restore backups made in TO3000 3D, which is useful for upgrading from TO3000 to Projetex. After the restore, please switch to the Corporate Settings tab, and the program will prompt you to select the BusinessServer folder location, since TO3000 databases do not use the BusinessServer folder..

3.7   Run Update Script

In some cases, when you update your Projetex Server Administrator or Projetex Workstation, database needs be updated as well. Usually database version is automatically updated during Projetex Server setup, however there may be exceptions. In this case database can still be updated manually by running a *database update script.*

Update scripts are always installed together with Projetex Server Administrator and can be found in *C:\Program Files\AIT\Projetex 3D\Projetex Serve\DBUpdates* folder in the form of *.PTU* files.

To update database using a database update script:

1.   Turn your database *offline* by clicking **Go Offline** button.

2.   Click **Run Update Script** button from the **Database** tab of the Projetex Server Administrator.

3.   Locate the script which updates your current database version to a next version. Current database version is displayed in **Database Version:** string on the **Database** tab of Projetex Server Administrator. Repeat update operation until you have the most current database version.

> **Example:**
>
> Installed database version is *8.91.0* and software update requires *8.93.0* database version. In this case you need to consecutively run two updates (first *dbx91to92.ptu* and then *dbx92to93. ptu*). Update files are not necessarily updating from the one number to the next.

 Note: You can run **Update Script** command in *Offline mode* only.

3.8 Clear Record Locks

To preserve database integrity in cases when several users simultaneously try to access certain database record, Projetex locks the record when it is being edited and unlocks it when the edit window is closed.

If some technical problems occur the unlocking of the record may fail and this will render the record unavailable for all users.

In this case you can use **Clear Record Locks** procedure to unlock the record.

To run **Clear Record Locks** procedure:

1. Turn your database *offline* by clicking **Go Offline** button.

2. Click **Clear Record Locks** button from the **Database** tab of the Projetex Server Administrator.

 Note: Be sure to switch back to the *Online* mode to make Projetex Server available for Projetex Workstation again.

3.9 Maintenance Operations

The Server Administrator utility can perform three maintenance operations on the SQL server.

Check Database - checks the logical and physical integrity of all the objects in the database and reports if any errors are found.

Rebuild Indexes - fixes any fragmentation of the database internal index

Update Statistics - updates the internal statistics of the database to help it build more efficient queries.

Whenever the overall performance of the server drops, it is recommended to perform all three operations in order.

3.10 View Online Users

Current Projetex Workstation connections can be viewed on the Database tab of Projetex Server Administrator. The total number of current connections is displayed in **Active Connections:** information string.

To view connection details, click **List** button on the **Database** tab of Projetex Server Administrator.

This will open **Connected Users** window listing all currently logged in users.

4 Server Administrator Corporate Settings Tab

4.1 Folders

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 the 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**, **Expert, JA** or **PO** 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.

4.2 Fields

Custom fields and their groups can be created and edited in this area.

Clients, **Projects**, **Corporate Team** and **Freelancers** tabs represent respective windows in Projetex Workstation. The tabs below them represent concrete areas where custom fields can be added.

  Note: Any custom fields added to Clients by default also appear in Prospects. Likewise, custom fields added to Freelancers appear in Applicants.

Groups of custom fields can be managed with the upper buttons line.

Custom fields of each of the groups can be managed with the help of lower buttons line.

Move Up and **Move Down** buttons can be used to change the order in which custom fields are displayed in Projetex Workstation.
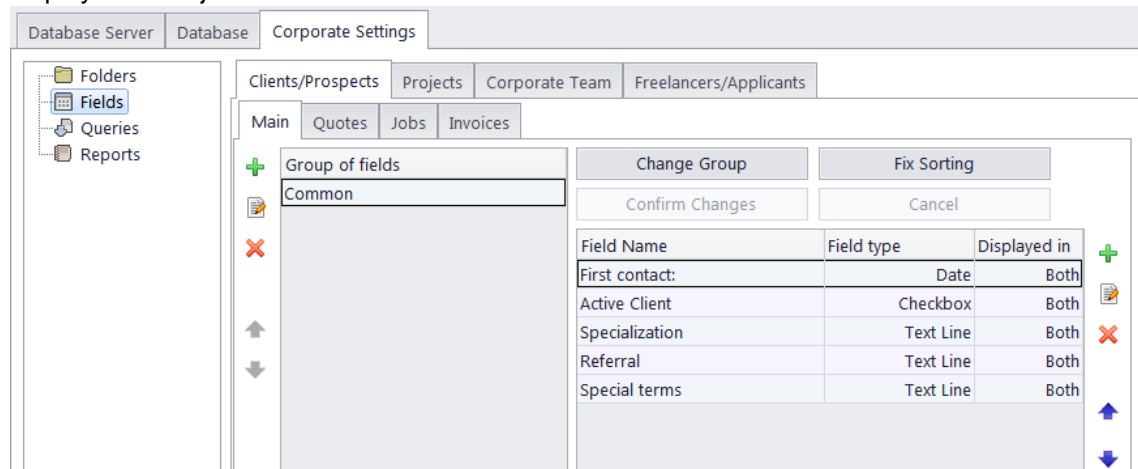
Detail information regarding Custom Field processing can be looked into Database Customization section.

4.3 Queries

Custom queries can be created here. Queries can be used to extract and export data directly from Projetex database without the use of Projetex Workstation.

Double-click any of the queries in the list to open this query **Query Builder** window.

Use **New**/**Edit**/**Delete** to create, modify or delete custom queries.

Click **Export Data** button to save query results in TXT, CSV, HTML, RTF, XLS or PDF file.

Click **Print Data** button to send query results directly to printer.

Click **Load** button to import a custom query from a PXQ file.

Click **Save** button to export custom query to a PXQ file.

4.4 Reports

This area is intended for custom reports administration. The following options are available for custom reports:

Use **New**/**Edit**/**Delete** to create, modify or delete custom reports.

Click **Edit Details** button to open **Edit Custom Report** window where reports name and description can be changed.

Click **Preview** button to run currently selected report and view its results in a separate window.

Click **Load** button to import a custom report from a PX15 file.

Click **Save** button to export currently selected custom report to a PX15 file.

 Note: Custom reports which are displayed in **Custom Reports** section of Projetex Server Administrator are the ones currently integrated into Projetex database. *PX15* files are used solely for export-import purposes, thus deleting *PX15* file from *C:\Program Files\AIT\Projetex 3D\Projetex Server\Reports* will not delete any of reports in database. .

4.5 ODBC

ODBC Access area of **Corporate Settings** tab can be used to enable access to Projetex database through the *ODBC* and to set a password for such access.

Detail information regarding ODBC access processing can be found in ODBC access in Projetex section.

5 Administrator Settings in the Workstation

5.1 General

On the **General** tab of **Administrator** window you can set the company logo, base currency, payment terms for freelancers and postal address format, as well as a few procedural options.

The **Company Logo** button can be used to set your company logo as it will appear on the Backstage view button in the Workstations.

The **Base Currency** button can be used to set or change the base currency of your company. After changing the base currency the program will prompt you to re-define the currency exchange rates.

Base Unit defines the volume unit against which all other units are measured. Base units are used to calculate corporate job totals and expert experience (total volume of all jobs completed by the expert, converted into base units). When you change the base unit, you are automatically prompted to re-define the unit ratios for the other units.

The Freelancer Payment Terms button can be used to edit the default payment terms for freelancers. Click this button to open the Edit Payment Terms for Freelancers window. There you can configure the payment conditions for freelancers, including:

- **Minimum Fee** — this is the minimum sum the POs must accumulate, before they can be paid. Type 0 in this field to disable **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), completed (PO completion date), the day the job was invoiced (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.

   Note: To set individual payment terms for specific freelancers, use **Payment Terms** button in the freelancer's profile on the **Main** tab of **Freelancer** window.

Postal Address Format button can be used to set default display order of postal address elements (like country, city, ZIP code and so on) in the printed documents. Use **Move Up** and **Move Down** buttons to change order of postal address elements. If you need to separate postal address elements using some special character (for example, comma), you can type this delimiter in **Address Fields Delimiter** field.

Invoices in the middle of range can be deleted check box deactivates default security system that does not allow deletion of invoices, which are in the middle of range.

Check **Enable numbering of Client Invoices copies** to add the **Number of copies** field to the Edit Invoice window. The number specified in that field can be added to printed invoices via the \INVOICE_COPY\ variable.

Mark new corporate jobs as approved - select this checkbox to have all new corporate jobs automatically marked as approved.

Mark new freelance jobs as approved - select this checkbox to have all new freelance jobs automatically marked as approved.

Use Lock Records prohibits simultaneous editing of the same record from different workstations. Edit windows on any workstations except the first to access the same record will be opened in read-only mode.

5.2   Users and Access

Users and Access area can be used to browse existing user accounts, create new users and modify access rights of existing users.

Double-click any user in the list to edit access rights of that user.

Click **New** button to add a new user account.

Click **Edit** button to edit currently selected user account.

Click **Delete** button to delete currently selected user account.

New/Edit User Window

In this window, the access rights of a user can be configured.

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

The **Name** field is used to enter the actual full name of the user. This name will be used in Projetex to refer to this user. This is not a login name.

The **Login** field stores the user name used to log in to Projetex.

The **Password** field stores this user's password. Passwords are case-sensitive.

The **Position** field contains the description of the user's position. Usually this is the name of the Access role preset. The position field does not affect any actual access rights.

The **Access is blocked** check box can be used to disable this user's account.

Role & Rights tab

You can quickly assign pre-defined access rights to this user by clicking the **Copy from Access Role button**. This will copy settings from one of the access roles you have previously defined in the **Access Roles** tab.

Each user can have one of three general access levels:

- **Advanced** is the highest access level possible. Users with advanced access can view all clients and projects in the database. These users can also assign account managers and project managers, as well as create client product lines.
- **Normal** access level permits a user to view only assigned clients and projects. Thus, if a normal access level user is not a project manager of a project, or not an product line project manager of the client's product line, he or she cannot view this project. This access level is recommended for project managers.
- **Corporate Expert (Auto).** This access level is always associated with a particular expert profile, chosen via drop-down list. This user will have access only to that particular expert profile and the records and files associated with it. The user will also have access to the Team and Expert knowledgebases.

Show AHC data - select his check box to permit the current user access to the average hourly cost rates of in-house translators experts.

The **Export** and **Print** options in the **Local Reports** block - toggle these to determine the user's access to local export and print functions.

View **Corporate Settings** - check to enable access to **Corporate Settings** in the **Backstage** for the current user.

Alerter Administrator - if checked, the user can log into the Automation Engine.

Server Administrator - If checked, the user can log into the Server Administrator program and has access to the **Administrator** tab in the Workstation Backstage.

Access Rights

This area is used to configure the user's access to various Projetex windows and tabs.

Select or clear check boxes to hierarchically grant or deny access to:

1. Sections of the Navigation Bar,
2. Ribbon tabs within the sections,
3. Icons within the Ribbon tabs,
4. and tabs within the Client, Prospect, Project, Corporate Expert, Freelancer, and Applicant tables.

Contact Info tab

This tab stores the basic contact info for each user account and contains the following fields:

E-mail (up to 2) — maximum 250 characters.

Enable Mail Alert — enable this check box to allow the user to receive alerts from the Automation Engine to the first e-mail address.

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

The "Admin" Account

This is the default account that can not be deleted or disabled, has full access to all areas of Projetex and a reduced number of options.

You can alter the account's photo, password, name, position designation, and add an e-mail with the option to send alerts to it.

5.3 Access Roles

Access roles are presets of access configuration for a number of users with similar access to Projetex windows and tabs. These presets can later be used to quickly assign access rights to new users or change access rights of existing users.

Double-click any access role in the list to edit access rights granted by that role.

Click **New** button to add a new user access role.

Click **Edit** button to edit currently selected access role.

Click **Delete** button to delete currently selected access role.

New/Edit Access Role Window

In this window access roles can be configured.

The **Position** field contains the description of user's position. This is the name of Access role preset.

Show AHC data - select his check box to permit the current user access to the average hourly cost rates of corporate experts.

The **Export** and **Print** options in the Local Reports block - toggle these to determine the user's access to local export and print functions.

Access Rights

This area is used to configure the user's access to various Projetex windows and tabs.

Select or clear check boxes to hierarchically grant or deny access to:

1. sections of the Navigation Bar,
2. Ribbon tabs within the sections,
3. Icons within the Ribbon tabs,
4. and tabs within the Client, Prospect, Project, Corporate Expert, Freelancer, and Applicant tables.

5.4   Codes

In Projetex "global" codes are used to identify projects, clients, experts, invoices and POs. These codes are generated automatically upon creation of respective item and cannot be edited by users.

Next Codes button will open **Next Global Codes** dialog, which can be used to assign next values of global project, invoice and PO code counters.

Prefix field can be used to enter custom prefix to Global Invoice Codes.

Suffix field can be used to enter custom ending to Global Invoice Codes.

Enable annual numbering resets checkbox can be used to perform a switch from sequential invoice numbering to the one which would start from invoice number 1 each new year.

Note: This procedure is irreversible. After **Enable annual numbering resets** is selected, these resets cannot be rolled back.

The **Codes in naming of .RTF Files** drop-down lists can be used to select the code (global or client-specific) to be used as the default file name when saving invoices or POs for printing.

5.5   Salutations

Use **Salutations** tab of the **Corporate Settings** window to create new or edit existing salutations if needed.
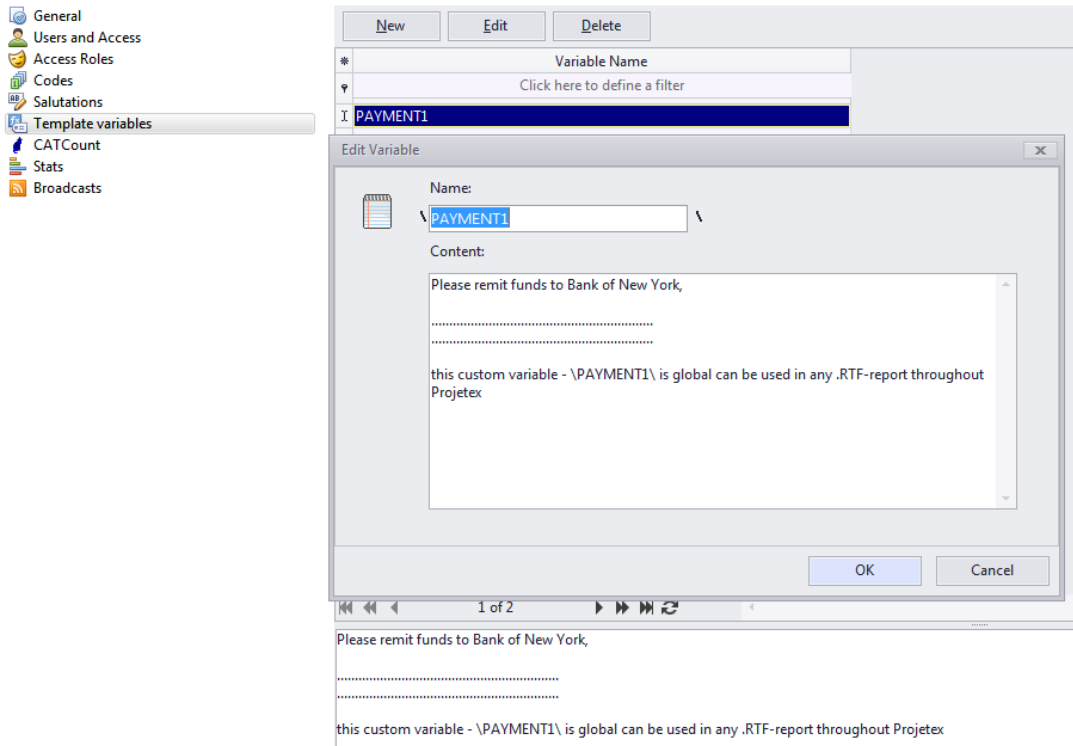
Double-click any salutation in the list to edit it.

Use **New**/**Edit**/**Delete** buttons to create, modify or delete custom salutations.

Every salutation is associated with a gender: **Male, Female,** or **Undefined**.

These are the options which appear in the **Salutation** drop-down list when creating or editing contacts.

5.6   Template Variables

Global custom variables can be created here. These variables can then be used in document templates.

Double-click any custom variable in the list to edit it.

Use **New**/**Edit**/**Delete** to create, modify or delete custom variables.

When you enter the name of a variable, bounded by backslashes, into a template, the content of the variable will be entered into any document generated from the template.

> **Example:**
>
> If you enter *EMAIL* as a name of the variable and info@marsonlymars.com as a content, you will be able to use *EMAIL*\ variable inside all your .rtf templates.
>
> If later e-mail of your company changes to info@venusforever.com you will not have to change it in all templates but will be able to do this only once in Administrator: global custom variables.

When adding custom variables to templates, be sure to enclose variable name between two "backslash" symbols.

5.7 CATCount

This area contains a few controls of CATCount tool used to calculate volumes of computer-assisted translation.

Select **Enabled** check box to enable **CATCount** in Projetex Workstation.

Click **Change** button and select wordcount units in which CATCount must provide its counts. CATCount supports only word-based units.

When this feature is enabled, **CATCount** button appears in **New Client Job (Edit Client Job)**, **New Corporate Job (Edit Corporate Job)**, **New Freelance Job (Edit Freelance Job)**, **New/ Edit Client Quote**, and **New/Edit Freelance Quote** dialog windows of Projetex Workstation.

Note: Units displayed in this list can be edited in **Volume Units** area of **Corporate Settings** tab of Projetex Workstation.

5.8 Stats

This area contains settings for the graphical representation of a corporate expert's experience value (total volume of all jobs completed by the expert, converted into basic units).

A corporate expert's experience is represented graphically by small and large stars, and you can enter the number of basic units that each star represents.
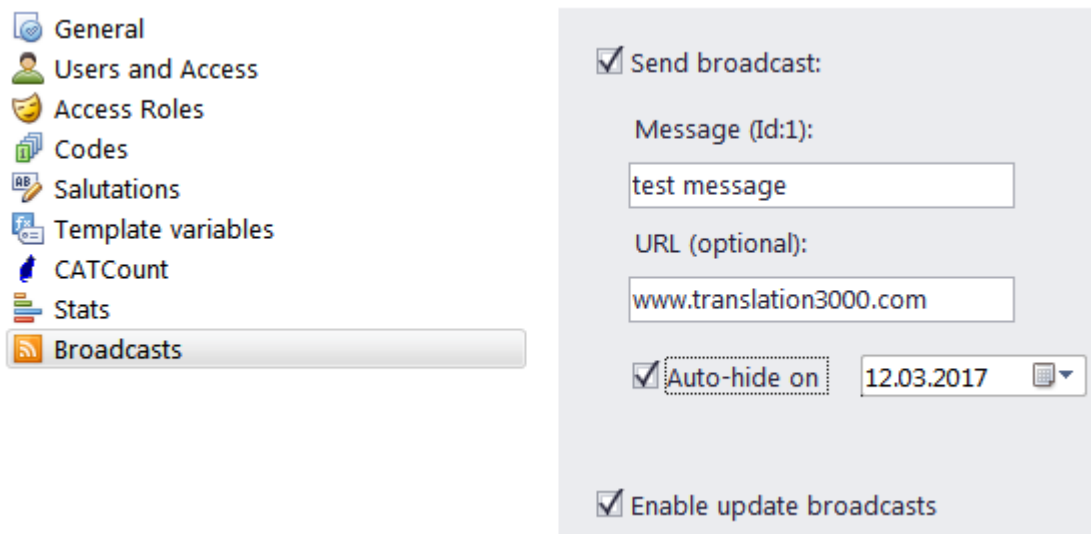
Be sure that the large star has a higher value than the small star.

The default values are 10000 basic units (words by default) for a small star and 100000 for a large star.

An expert's experience can be viewed in the Stats tab of the expert's Profile.

5.9 Broadcasts

The **Broadcasts** tab contains settings for sending short internal messages to all workstations.

To send a broadcast, check Send Broadcast and enter the message. You may optionally add a URL link to the message (then clicking the message will open the link in the default Internet browser) and set a date when the message will be turned off automatically.

The broadcast message will be displayed in the bottom-right corner of the screen for all users and will be closed once the user clicks either the URL link or the "close" button.
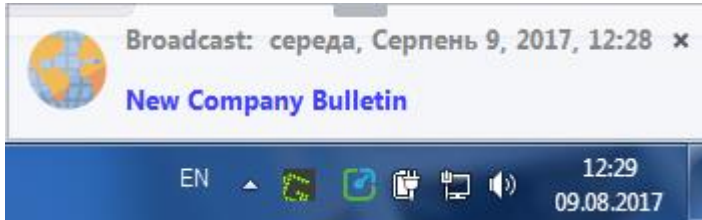

The message can be moved around and will be hidden automatically after 10 minutes, but will appear every time the user logs in until explicitly closed.

Enable Update Broadcasts will allow you to receive broadcasts from AIT about updates to our products.

6   Database Customization: Custom fields

Projetex supports database structure customization in the form of adding custom fields to certain tables in the database. Custom fields can be added via the Fields section in the Server Administrator's **Corporate Settings** tab.
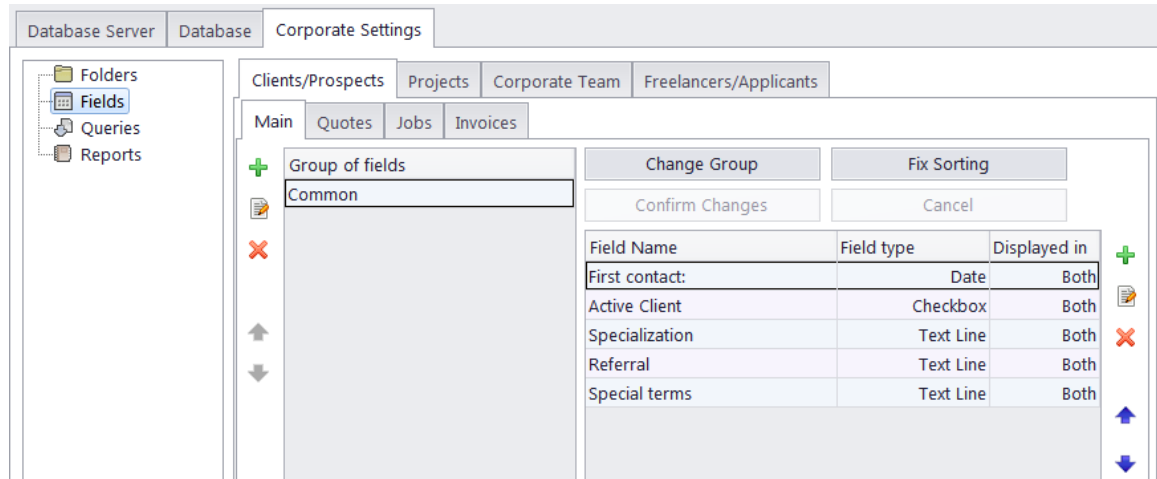
When creating a new custom field, you will need to specify a group of fields to which the newly created field belongs. So if you want it to be other than the default Common group, create a custom Group of fields first.

Custom fields can be added to the following tables:

1. Clients (and Prospects):

- The Main tab of the Client/Prospect window (client/prospect profile)
- Clients/Prospects: Quotes
- Client/Prospect Jobs
- Invoices

2. Projects (The Main tab of the Project window only).

3. Corporate Team:

- The Main tab of the Corporate Expert window (expert's profile)
- Corporate Jobs
- Corporate Expenses
- JAs

4. Freelancers (and Applicants):

- The Main tab of the Freelancer/Applicant window (freelancer's/applicant's profile)
- Freelancer/Applicant Quotes
- Freelance/Applicant Jobs
- Pos

6.1   Creating Groups of Custom Fields

Each group of custom fields represents a separate tab in Projetex Workstation.
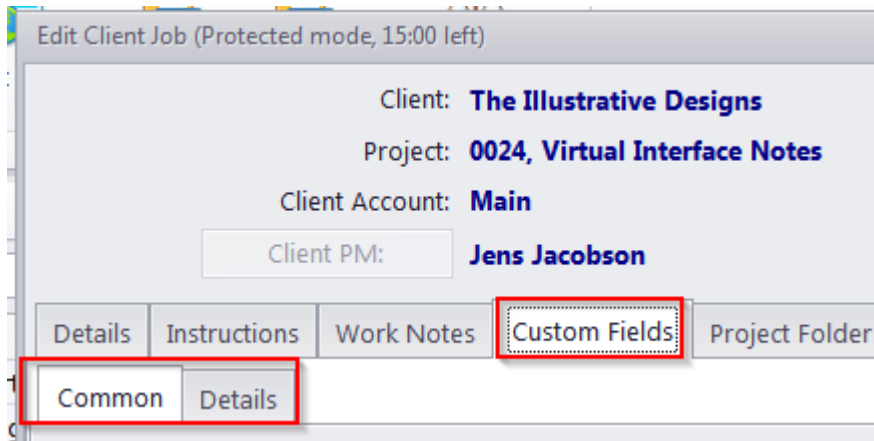
To create or modify a group of custom fields:

1. Run the Projetex Server Administrator and switch the database into Offline mode on the **Database** tab.

2. Switch to **Corporate Settings** tab and click **Fields**.

3. Select the area to which a new custom field group must be added.
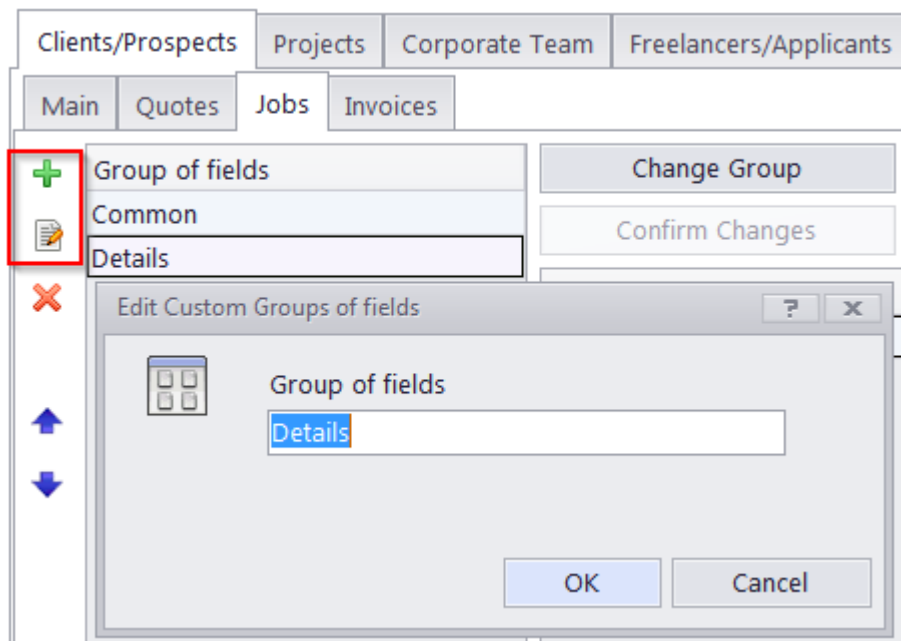
4. Click the **New Group** button in the group of fields control buttons or double-click any group to edit its name.

   Note: To delete a Group of fields, you need to delete all Custom Fields it contains, or move them to other groups first.

To change the order of **Groups of fields**, i.e. the order of tabs with the **Custom Fields** tabs, use the **Move Up Group/Move Down Group** buttons.

6.2 Creating Custom Fields

Custom fields can be created on the **Corporate Settings** tab of the **Projetex Server Administrator**. To create or modify custom fields:

1. Run the Projetex Server Administrator and switch the database into Offline mode on the **Database** tab.

2. Switch to **Corporate Settings** tab and click **Fields**.

3. Select the required area tab (e.g. Clients >> Main)

4. Select a group of fields and click the **New Field** button.
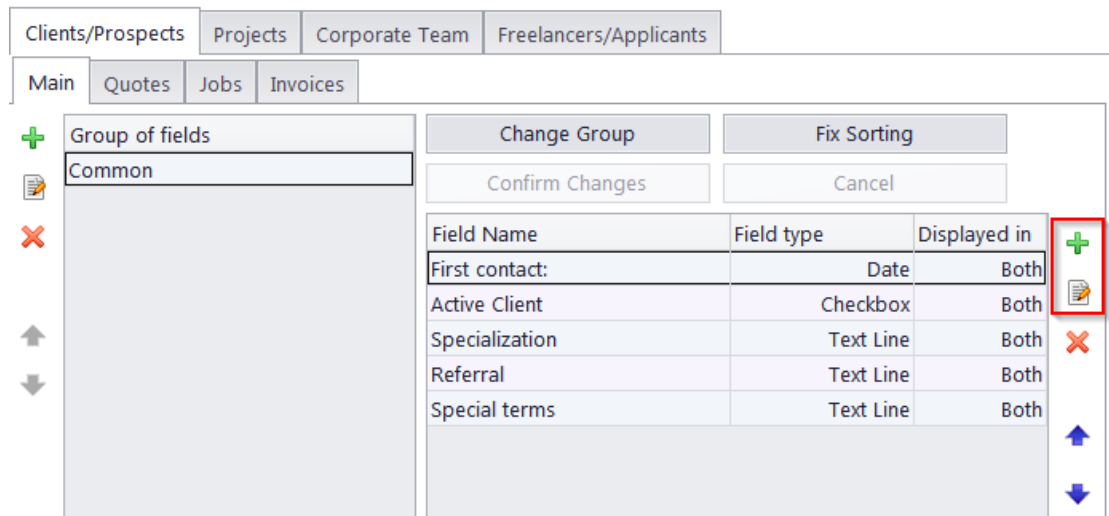
5. Fill the fields of the **New Custom Field** window:

- Enter the name of the new custom field in **Name** field.
- Select the data type of the new custom field from **Type** drop-down list and any additional options (depending on the type selected.
- Certain areas (such as the Main and Quotes tabs for Clients/prospects) have an additional drop-down menu, to choose which of the two tables a field should be displayed in.
- (Optional) Enter the variable name for this custom field; you will be able to use this variable in .RTF templates.
- Click **OK** to add the specified custom field or click **Cancel** to discard.

Example:

To create a custom field that will look like a drop-down list, select **Text line** as the data type, and then check the **Has fixed list of values** check box. Enter the options for that check box in the field that appears:

To move the custom fields to another **Group of fields**, i.e. another tab, click the **Change Group** button, select the target group, and click OK.

If the list displays incorrect results after moving fields or groups around, click **Fix Sorting**.

To change the order of custom fields, use the **Move Up Field/Move Down Field** buttons.

To confirm changes to custom field settings, click the **Confirm Changes** button.

   Note: If you leave the Custom Fields settings without clicking this button, Projetex will ask you whether the changes should be saved.