Project Manager — Reference Guide

Table of Contents

Introduction for Project Manager

Most of the options required for Project Manager are included in the Projects section of Projetex. Since primary purpose of Projetex is project management — most of program windows are intended for project managers. The procedures below merely point out some of the areas in the program.

In general, Project Management in Projetex consists of the following primary steps:

Step 1 – Creating a project. This includes entering project data to Projetex database, setting deadlines, and managing project files. See the following sections for details:

- Project Profile
- File storage and management

Step 2 – Breaking the Project into a number of billable client jobs, each of which can have a certain volume and price. See the following sections for details:

- Prices to client

Step 3 – Assigning different portions of client jobs to translators (or "Experts"). This involves splitting client jobs into smaller one-man assignments: creating corporate jobs and freelance jobs, each of which can be assigned to an in-house translator (or "corporate expert") or to a freelancer. See the following sections for details:

- Creating corporate jobs
- Creating freelance jobs
- Selecting Experts

Step 4 – Submitting jobs to corporate experts. This step has to deal with issuing printable job assignments as well as providing necessary project files to corporate experts. See the following sections for details:

- Creating job assignments

Step 5 – Subcontracting some portions of Project work. This involves issuing printable purchase orders (or POs) to freelance experts. Each purchase order has a number of freelance Jobs, with their volumes and prices. See the following sections for details:

- Creating purchase orders

Step 6 – Tracking Project and Job progress with the help of Calendars and reports. See the following sections for details:

- Using Calendars

Step 7 – Closing completed jobs and projects, issuing and approving printable invoices to client, based on agreed payment terms. See the following sections for details:

- Invoices to client
- Balance of Project

Project Window Tabs

Project window can be used to view, edit and enter new information about your projects, as well as to create and manage client and *expert* jobs, purchase orders, job assignments and project files.

Project Window tabs

Different tabs of **Project** window represent different aspects and elements of your projects stored in Projetex database. Project data is broken into the following **Project** window tabs:

Main tab — provides the most basic overview of your projects. Projects are created and marked as completed here. This tab also contains project profiles.

Tree tab — provides schematic view of project jobs and expert assignments structure. Here client and expert jobs can be created and experts can be assigned.

Client Jobs tab — gives an overview of client jobs of a project. Client jobs can be created here as well.

Corporate Jobs tab — gives an overview of jobs assigned to corporate experts. Corporate jobs can be created and experts can be assigned to these jobs here.

Freelance Jobs tab — gives an overview of jobs assigned to freelancers. Freelance jobs can be created and freelancers can be assigned to these jobs here.

Freelance Team tab — provides freelancer search options. With the help of this tab freelancers can be searched and grouped for a selected project.

JAs tab — used for issuing and managing job assignments (JAs) for corporate experts.

POs tab — used for issuing and managing purchase orders (Pos) for freelancers.

Acccount tab — provides basic overview of the financial Account of a selected project.

Files tab — provides quick access for project folder of a selected project, as well as to other files related to this project.

Info tab — this tab is used for creating various project-related notes.

Calendar tab — a schematic overview of project jobs, presented in a form of a Calendar.

Main Tab of Project Window

Main tab of **Project** window contains list of projects and project profiles. Use this tab to create new projects, change project parameters and close projects as they get completed.

When deleting a project, you will be prompted to enter the project's number to confirm your deletion request.

To create a project based on the data of an existing project, use the **Clone** button.

Projects List

To search project by its name, or any other data visible in the table, type the string being searched for into the **Find Panel** over the main list.

To sort project list by a certain column, click this column's header. Clicking **Code** column will sort projects by their codes (or chronologically), clicking **Project name** column will sort projects by their names (or alphabetically).

Information displayed in projects list can be configured. Use the **Customize columns** option to add or remove columns (Deadline, PM and so on).

Projects in the list can be filtered by project status (completed, planned and so on) or by project managers in charge of these projects.

Each project can have a flag assigned to it. A project's flag can be changed by right-clicking it and selecting a flag.

Note: Due to user access restrictions, some filter operation (like local custom filter and global date filter) or page settings you may not be able to see all the clients in the database. **Summary** at the bottom of projects list displays if all the projects are shown.

Project Status

Records in project list are marked by color:

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

Blue — the project is not completed and due today.

Red — the project is not completed and overdue.

Black — the project is completed.

Orange background — *On Hold* status

Green background — *Heads-Up* status

Grey background — *Canceled* status

Note: You can change colors to mark off items status on the **Colors: Status** tab of the **User Settings**.

Project Profile

Project Code is automatically assigned to each project in Projetex. All project codes are unique and cannot be edited.

Name — project name can be 150 characters long.

Client Product Line — this button can be used to assign a project to a different product line of the client. The current product line name and the list of responsible product line project managers is displayed next to the Client Product Line button.

Client PM — one of the client's contacts, responsible for this project on the client side. The person selected here will be set as the default client's PM for all new client jobs of this project.

Corporate PM — one of the company's project managers, responsible for this project on the corporate side. The person selected here will be set as the default corporate PM for all new client jobs of this project.

Timeline — the timeline of a project in Projetex includes the assignment date, the deadline, and the date when the project has been actually completed.

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

Based on Quote — projects created from quotes will have the quote code displayed here.

General Information — a project's profile can contain any general information relevant to this project, as a plain text note.

Project database can be customized by adding custom fields. Any custom fields which have been added to projects database, can be accessed by clicking **Custom Fields** tab next to the **Project Profile** tab.

The **Audit** tab keeps track of who edited the project profile and when.

Tree Tab of Project Window

The Tree tab manages the job structure of projects and consists of the following parts:

- *tree scheme* of the current project (in the left part of the tab), which represents the structure of the project;
- *jobs tables*, which are displayed to the right.

Tree Scheme

Project in Projetex can contain three types of jobs:

- **Client jobs —** jobs which your company has to do for the client. These are the jobs which has been quoted to client and which the client has purchased. These jobs can be included into your invoices to client.
- **Corporate jobs —** jobs being done by corporate (in-house) experts, employed by your agency.
- **Freelance jobs —** jobs, subcontracted to freelance experts (or any other vendors). These jobs will be included into your purchase orders to freelancers.

Corporate and freelance jobs icons with question marks ( ) indicate that no expert has yet been assigned to these jobs.

Project is broken down by *client jobs*, which in their turn can be split into a number of *corporate jobs* and *freelance jobs*. All these jobs can be created, edited and deleted in one window, using **Client Jobs** and **Expert Jobs** tabs to the right of Tree view field.

Clicking any of the jobs in the project tree view will highlight its data in the tables to the right.

Client Job Buttons

New Client Job button can be used to add another *client job* to the current project.

Edit button will open *client job* for editing.

Delete button will delete currently selected *client job*.

Clone button will create a copy of the selected *client job* (without any expert jobs in it).

AnyCount button will run text count engine which will count files, specified by you, and will create a new *client job* based on count results.

Expert Jobs Tab Buttons

New button can be used to add another *corporate job* (if **Corporate** tab is open) or *freelance job* (if **Freelance** tab is open) to the current project.

Edit button will open currently selected *corporate* or *freelance job* for editing.

Delete button will delete currently selected *corporate* or *freelance job*.

Clone button will create a copy of the selected *corporate* or *freelance job*. Cloned expert job will have no experts assigned.

Client Jobs Tab of Project Window

Client Jobs tab lists all client jobs within the currently selected project.

Client Job Filters

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

Using **Invoiced** filter drop-down list you can select to display only those *client jobs* which have or have not been invoiced.

Client Job Statuses

Jobs in the list are shown in different colors. These determine current status of each client job:

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

Blue **—** client job is *not completed* and *due today*.

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

Black **—** client 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 **Special Status** drop-down list in **Edit Job** window.

Corporate Jobs Tab of Project Window

Corporate Jobs tab of the **Project** window lists all corporate jobs of currently selected project.

Corporate Job Filters

Status filter drop-down list allows you to select to view only jobs with a particular status: *completed* , *not completed*, *overdue* and so on.

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

Corporate Job Statuses

This tab displays all the corporate expert jobs of the selected project. As well as on **Tree** tab, here you can edit and delete corporate jobs, assign or unassign experts to them. Corporate jobs in the list are shown in different colors. These determine current status of each corporate job:

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

Blue — corporate job is *not completed* and *due today*.

Red — corporate job is *not completed* and *overdue*.

Black — corporate 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 **Special Status** drop-down list in **Edit Job** window.

Freelance Jobs Tab of Project Window

Freelance Jobs tab of the **Project** window lists all corporate jobs of currently selected project.

Filtering Freelance Jobs

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

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

Freelance Jobs statuses

Just like any other job in Projetex, *freelance jobs* are displayed in different colors, depending on their statuses.

- Black — the freelance job is *completed*.

- Green — the freelance job is *not completed* yet, *deadline in the future*.

- Blue — the freelance job is *not completed* and *due today*.

- Red — the freelance job is *not completed* and *overdue*.

 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 **Special Status** drop-down list in **Edit Job** window.

Freelance Team Tab of Project Window

Freelance team is a group of freelancers with skills and prices acceptable for a certain project. The purpose of freelance team is to help project managers save time searching the whole database each time they assign an expert. With the help of freelance team, suitable freelancer candidates can be selected and defined for a certain project. You can select freelance expert for a job either from the general list or from the freelance team list set for this project (if this project has a freelance team).

Freelance Team tab of **Project** window displays all freelancers selected for the current project.

Freelance Team Buttons

Add button will open **Freelance Chooser** window, displaying all the freelance experts in the database.

Edit button can be used to add or edit notes for any member of a current freelance team.

Remove button will remove currently selected freelancer from the freelance team.

Search button allows to search a freelance expert by his or her *language pairs* (translation services), *prices* or *completed jobs.*

JAs Tab of Project Window

JA tab of **Project** window contains the list of *job assignments* (*JA*) to in-house experts within the currently selected project. Assigning expert to corporate job does not automatically create job assignment. Using this tab project managers can create job assignments to corporate (in-house) experts. Job assignment is a request for expert to begin working on a certain job or jobs.

New button will open New JA window, which can be used to add a job assignment to any unassigned corporate jobs within the current project.

Edit button will open currently selected JA for editing.

Delete button will delete currently selected job assignment.

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

POs Tab of Project Window

POs tab of the **Project** window is the only area where *purchase orders* (*PO*) to your freelancers can be created or deleted. Purchase order (or a PO) is a printable document, which includes a number of freelance jobs with their respective prices, discounts, markups and taxes. Purchase order to freelancer can include only jobs assigned to this freelancer.

Purchase Order Filters

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*.

Purchase Order Statuses

Purchase order statuses change depending on your payment terms to freelancers and your payments to freelancers linked to purchase orders. POs in the list are shown in different colors. These determine current status of each purchase order:

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).

Projetex automatically assigns and updates statuses of POs depending on **Payment Terms of Freelancer**.

Account Tab of Project Window

Aggregated financial totals, as well as most basic performance measurement and analysis, can be viewed on the **Balance** tab of **Project** window.

The following information is available:

- **Client Jobs** — total value of project's client jobs (accounts receivable, net profit of a project).
- **Freelance Jobs** — total value of project's freelance jobs (accounts payable).
- **Corporate Jobs** — total cost of project's corporate jobs based on average hourly cost (*AHC*) of inhouse experts and total time spent per each jobs (accounts payable).
- **Gross Project Profit** — total value of client jobs of currently selected project, minus total value of freelance jobs of currently selected project, minus total cost of project's corporate jobs.
- **Gross Profitability Analysis** diagram displays a pie chart, comparing volumes of project's corporate jobs, freelance jobs add gross profit.
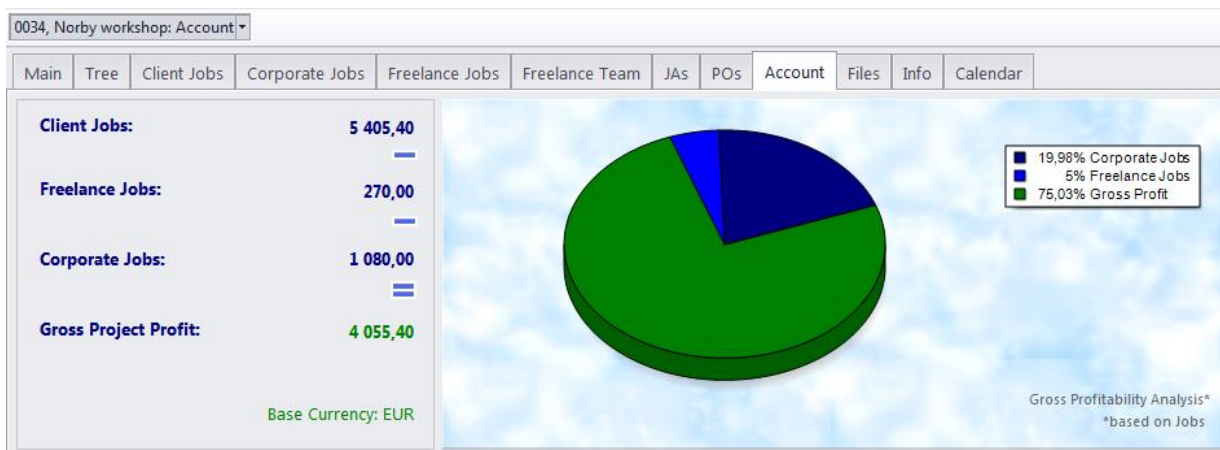
Files Tab of Project Window

Files tab of the **Project** window to work with files and folders related to this project.

This particular **Files** tab covers the following areas:

- The *Project* folder.
- The *JA folders* of the current project. If any job assignments have been created within this project, they will be displayed in the field to the right.
- The *PO folders* of the current project. If any purchase orders have been created within this project, they will be displayed in the field to the right.
- The *Client folder* of this project's client.
- The *FTP connections* of this project's client.
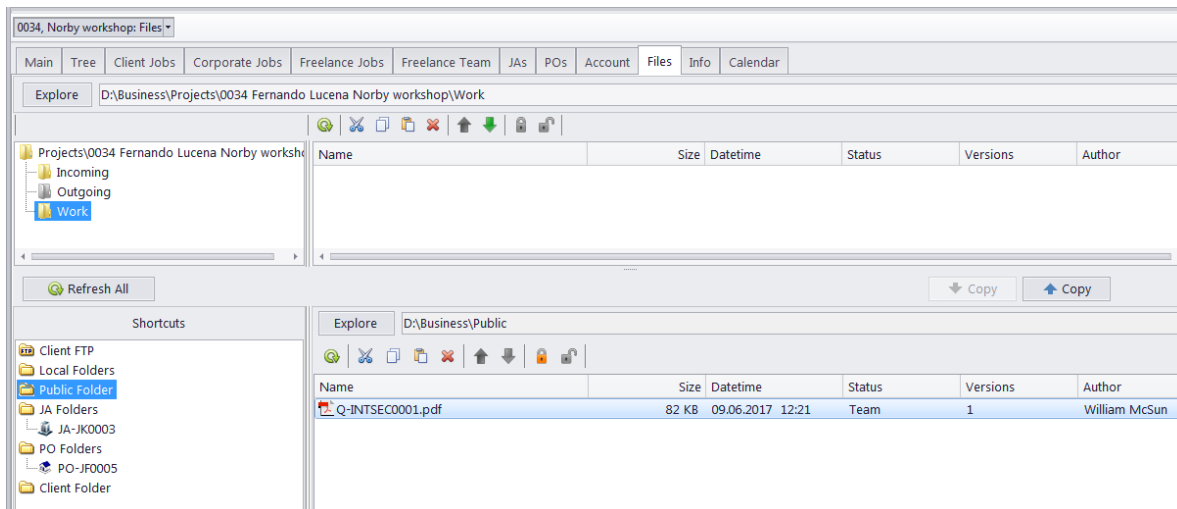
The main file manager window consists of two horizontal panes. The upper pane shows the project folder and the content of the currently selected sub-folder. The lower pane allows to open shortcuts. Clicking any of the Shortcuts options will create a second file view field to the right, and open the appropriate folder there. This allows to simultaneously work with two opened folders in the same window.

Files can be exchanged between the project folder and existing Shortcuts using the two Copy buttons.

 - is used to copy file from path currently opened in Shortcuts pane to project folder .

 - is used to copy file from project 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).

Info Tab of Project Window

Info tab of the **Project** window can be used to enter any optional additional information regarding the selected the project in plain text format. These notes will be available for all project manager users.

Each note record consists of the following elements:

- **Subject** — maximum 100 characters long.

- **Category** — to add categories of notes on the **Settings** menu, click **Current user** command and then click **Categories**.

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

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

Calendar Tab of Project Window

Calendar tab of the **Project** window displays Calendars of this client's *client jobs*

Each job block stretches across the calendar from assignment until completion, or until the deadline if the job has not been completed yet.

Double-click any block to open the **Edit Client Job** window for that job.

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.

Calendar 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.

Filtering the Calendar

Use the **Job Status** filter to display only jobs with a certain Status.

Use the **Project Manager** filter to display only the jobs belonging to a project led by a specific Project Manager.

Client Jobs Window

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

- **Client Jobs** window displays all client jobs of all projects.

- New client jobs cannot be created using this window.

- Existing client jobs cannot be deleted using this window.

Client Job Filters

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

Use **Invoiced** filter drop-down list to display only those client jobs which have or have not been invoiced.

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

If you have set *invoicing policy* for this client in this client's profile on the **Main** tab of **Client** window, Projetex will advise you whether the jobs are ready for invoicing or not.

Client Job statuses

Jobs in the list are shown in different colors. These determine current status of each client job:

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

Blue — client job is *not completed* and *due today*.

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

Black — client 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 Special Status drop-down list in Edit Job** window.

Corporate Jobs Window

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

- **Corporate Jobs** window displays all corporate jobs of all projects.

- New corporate jobs cannot be created using this window.

- Existing corporate jobs cannot be deleted using this window.

Corporate Job Filters

Status drop-down list allows you to select for view only jobs with a particular status: *completed*, *not completed*, *overdue* and so on.

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.

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

Corporate Job Statuses

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

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

Blue — corporate job is *not completed* and *due today*.

Red — corporate job is *not completed* and *overdue*.

Black — corporate job is *completed*.

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

Also, if a job has any status other than Normal, it will be highlighted in a different background color:

Orange background — *On Hold* status

Green background — *Heads-Up* status

Grey background — *Canceled* status

Note: You can change status of any job with the help of **Special Status** drop-down list in **Edit Job** window.

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

Freelance Jobs statuses

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

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

Blue — freelance job is *not completed* and *due today*.

Red — freelance job is *not completed* and *overdue*.

Black — freelance job is *completed*.

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

Also, if a job has any status other than Normal, it will be highlighted in a different background color:

Orange background — *On Hold* status

Green background — *Heads-Up* status

Grey background — *Canceled* status

Note: You can change status of any job with the help of **Special Status** drop-down list in **Edit Job** window.

Project Accounts Window

Project Accounts window provides a profitability overview of all the projects in database.

Gross Profit is calculated by deducting *corporate jobs* totals (based on average hourly costs and time spend) and *freelance jobs* totals from *client jobs* totals. Operating profit is calculated by deducting corporate expenses from gross profit. For each individual project, its balance and gross profit percentage is calculated instead. This does not include discounts and markups from invoices and POs allowing to determine abstract project profitability.

Comparative Gross Profitability Analysis diagram displays how profitable each project is in comparison with the rest of the projects.

Using **Project Manager** drop-down list you can select to view only projects of the certain project manager thus having a quick reference of this manager's project profitability.

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.

Settings for the Calendar view

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

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

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

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

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

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

Job/Project block colors

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

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

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

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

Grey — the job/project is canceled.

Pale Pink — the job/project is completed.

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

Pale Orange — the job/project is On Hold.

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

Filtering Calendars

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

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

Creating a project

Projects can be created from two areas of Projetex:

A: On the **Main** tab of **Project** window by clicking **New Project** button. If you use this option you are prompted to select a client or create a new one first.

B: On the **Projects** tab of **Client** window by clicking **New** button.

New/Edit Project window

The **New/Edit Project** window contains the following data:

Code — a unique project code is created automatically along with the project itself. It is a simple numerical counter.

Name — project name can be 150 characters long.

Client — client which this project is assigned to (cannot be changed after creation of the project).

Product Line — this button can be used to assign a project to a different account of client.

The current product line's name and the list of responsible product line project managers are displayed next to **Product Line** button.

Client PM — one of the client's contacts responsible for this project on the client side. The person selected here will be set as default *client's PM* for all new client jobs of this project.

Corporate PM — Project Manager, responsible for this project on your side.

Information — a plain text note for additional information.

Timeline — timeline of a project in Projetex includes assigned, deadline dates and the date when the project has been actually completed.

To mark project as completed, click **Timeline** button and select **Completed** check box.

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

Note: All project data except project code and client can be edited at any time later. See Main Tab of Project Window topic for details.

Note: Jobs data, like volumes, pricing and so on is added to an existing project in the form of client jobs and expert jobs. See Creating Client Jobs, Creating Corporate Jobs and Creating Freelance Jobs topics for details.

Custom Fields — project information can be customized by adding custom fields for additional information not foreseen by the default controls.

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

Audit — keeps track of when and by whom the project was modified.

Alerts — keeps track of messages received from the Projetex 3D Automation Engine.

You can save project data in a printable file or print it with the help of *RTF templates*

Templates for printing project data can be edited with the help of menu **Corporate Settings in** the **Backstage** view. Click **Templates** section to quickly access all template folders. Templates for printing projects are saved in *D:\BusinessServer\Templates\PROJECTS* folder.

Creating client jobs

Client jobs can be created in the following areas of Projetex:

A: Tree tab of **Project** window.

    - by right-clicking the tree view and selecting **New Client Job**

    - by clicking **New** button at the top of the tree view.

B: Client Jobs tab of **Project** window by clicking **New** button.

New/Edit Client Job window contains the following data:

Code — unique code of client job is created automatically along with the job itself. The first character "*J*" indicates that this is a job code, letters afterwards are client code, and the number is the value of client job counter for this client. Each client has independent code counter for this code.

Client Ref. — client reference can be maximum 20 characters long.

Client PO — number of client purchase order, can be maximum 40 characters long.

Client PM — one of the client's contacts, responsible for this job on the client side. Client PM name can be automatically included in invoice containing this job. By default this is the Client PM selected for this project. Client jobs of the same project can have different client PMs.

Name — name of client job appears in invoices where this job is included (usually this is the name of document being worked with). This name does not need to include language pair or service name, since this data is being added separately. Also this will be default name for any corporate job or freelance job added to this client job. Client job name can be 100 characters long maximum.

Group — group of services. All services in Projetex are broken down into groups. You can select any of the groups of services available. To add or edit a group of services, open menu **Corporate Settings** in the **Backstage** view, and select Groups of Services section.

Service — each group of services contains a separate list of services. Before selecting a service, select group of services first. To add or edit a service, open menu **Corporate Settings** in the **Backstage** view, and select Services section.

Volume — job volume can be indicated in a number of units (characters, words, lines, hours and so on). To add custom units, open menu **Corporate Settings** in the **Backstage** view, and select Volume Units section. All expert jobs of this client job will have their default volumes same as this volume.

You can also use built-in AnyCount or CATCount tools to quickly count volume of the job file, or calculate CAT text volumes (100% match, fuzzy match, and so on). You can import Trados and Logoport logs as well with the help of CATCount tool to quickly enter required volume.

Price — price can be entered manually or copied from client's individual price-list.

To copy price from price-list click **<=Price** button. Price for matching service, group of services and units will be copied.

Click **=>** button to copy the price to this client's price list.

You can set a fixed price for client job (which will not be multiplied by job volume) by selecting **flat fee** option in the drop-down list next to the price field. Select **free** option in the same drop-down list to set job total to zero. Price and volume in a free job must not necessarily be zero.

If client currency differs from your base currency, **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *job*. Note that this button does not change general exchange rate stored in your Projetex database. To change exchange rate for all future jobs go to Exchange Rates tab of the Corporate Settings.

Project Folder — when creating client jobs it is often necessary to work with project files (for example you may need to count project file for exact volume). Once the folder has been created, its content can quickly be accessed on the **Project Folder** tab of **New/Edit Client Job** window.

Create Invoice — allows for quick invoicing of a job. You will be prompted to add this job either to a newly created or an existing invoice.

Timeline — timeline of a client job in Projetex includes assigned, deadline dates and the date when the client job has been actually completed. **Deadline** and **Completed** values are taken into account when the program determines status of client jobs (like due today, overdue and so on).

You can use the buttons above the corresponding date fields to quickly set the assignment date to the current date, the deadline to the assignment date, or the completion date to the deadline or the current date.

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

Instructions — any instructions or comments of client regarding a client job can be entered here in the form of plain text note.

Work Notes — staff notes can be entered here. It is recommended to enter client notes and staff notes separately.

Custom Fields — client jobs information can be customized by adding custom fields for additional information not foreseen by default controls.

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

Audit — keeps track of when and by whom the project was modified.

Alerts — keeps track of messages received from the Projetex 3D Automation Engine.

You can save client job data in a printable file or print it with the help of *RTF templates*.

Templates for printing project data can be edited with the help of menu **Corporate Settings** in the **Backstage** view. Click **Templates** section to quickly access all template folders. Templates for printing client jobs are saved in *D:\BusinessServer\Templates\CLIENTS\Jobs* folder.

Creating corporate jobs

Corporate jobs can be created in the following areas of Projetex:

A: Tree tab of **Project** window.

    - by right-clicking a client job in the tree view and selecting **New Corporate Job**

    - by clicking **Expert Jobs** tab, then clicking **Corporate Jobs** tab and then clicking **New** button.

B: Corporate Jobs tab of **Project** window by clicking **New** button.

New/Edit Corporate Job window contains the following data:

Code — unique code of corporate job is created automatically along with the job itself. The first character "*J*" indicates that this is a job code, letters afterwards can be either *VACANT* (meaning that no expert has been assigned to the job) or represent the assigned expert's code. The number is a value of corporate job counter for the assigned expert. Each expert has independent code counter for this code. If corporate jobs are reassigned to a different expert, their codes (both letters and counter) change accordingly.

Corporate Expert — experts can be assigned and reassigned at will as long as this corporate job is not included in a job assignment. Corporate job must be removed from job assignment before the expert can be reassigned from it.

Name — this name does not need to include language pair or service name, since this data is being added separately. By default this is the name of parent client job. Corporate job name can be 100 characters long maximum.

Group — group of services. All services in Projetex are broken down into groups. You can select any of the groups of services available. To add or edit a group of services, open menu **Corporate Settings** in the **Backstage** view, and select Groups of Services section.

Service — each group of services contains a separate list of services. Before selecting a service, select group of services first. To add or edit a service, open menu **Corporate Settings** in the **Backstage** view, and select Services section.

Volume — job volume can be indicated in a number of units (characters, words, lines, hours and so on). To add custom units, open menu **Corporate Settings** in the **Backstage** view, and select Volume Units section.

You can also use built-in AnyCount or CATCount tools to quickly count volume of the job file, or calculate CAT text volumes (100% match, fuzzy match, and so on). You can import Trados and Logoport logs as well with the help of CATCount tool to quickly enter required volume.

Price — price can be entered manually or copied from client's individual price-list.

To copy price from price-list click **<=Price** button. Price for matching service, group of services and units will be copied.

Click **=>** button to copy the price to this client's price list.

You can set a fixed price for client job (which will not be multiplied by job volume) by selecting **flat fee** option in the drop-down list next to the price field. Select **free** option in the same drop-down list to set job total to zero. Price and volume in a free job must not necessarily be zero.

If the expert currency differs from your base currency, **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *job*. Note that this button

does not change general exchange rate stored in your Projetex database. To change exchange rate for all future jobs go to Exchange Rates tab of the Corporate Settings.

Time spent — unlike client and freelancer jobs, the corporate job cost can also be determined by multiplying time spend on the job by average hourly cost (AHC) of a corporate expert who completed it. Results are displayed in **Total Cost** string. Projetex will also calculate *productivity* (words per hour) of the corporate job by taking into account volume, time spent and AHC.

JA Folder — job assignment folders contain all files an expert would need to begin working on the job. When creating or editing corporate jobs it is often necessary to work with job files (for example you may need to copy a name of the file or count job file for exact volume).

Before creating a JA folder, create a job assignment itself by clicking **Create JA** button. This will create a job assignment containing this corporate job, or add this job to existing JA, if there are any. See Creating job assignments for more details on JAs.

Once job assignment has been created, **JA Folder** tab becomes available. This tab can be used to access JA folder without opening any additional windows. Also, **JA Folder** tab can be used to quickly find and access a number of folders related to this job, like project folder, client folder and ftp folders of client.

Timeline — timeline of a corporate job in Projetex includes assigned, deadline dates and the date when the corporate job has been actually completed. **Deadline** and **Completed** values are taken into account when Projetex determines status of corporate jobs (like due today, overdue and so on).

You can use the buttons above the corresponding date fields to quickly set the assignment date to the current date, the deadline to the assignment date, or the completion date to the deadline or the current date.

Job Quality — job quality allows to evaluate quality of a job performed by a corporate expert. There can be type any mark from 1 till 100.

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

Instructions — any instructions or comments of Project Manager regarding a corporate job can be entered here in the form of plain text note.

Work Notes — corporate expert notes can be entered here. It is recommended to enter PM notes and expert notes separately.

Custom Fields — corporate jobs information can be customized by adding custom fields for additional information not foreseen by default controls.

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

Audit — keeps track of when and by whom the project was modified.

Alerts — keeps track of messages received from the Projetex 3D Automation Engine.

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

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

Creating freelance jobs

Freelance jobs can be created in the following areas of Projetex:

A: Tree tab of **Project** window.

    - by right-clicking a client job in the tree view and selecting **New Freelance Job**

    - by clicking **Expert Jobs** tab, then clicking **Freelance Jobs** tab and then clicking **New** button.

B: Freelance Jobs tab of **Project** window by clicking **New** button.

New/Edit Freelance Job window contains the following data:

Code — unique code of freelance job is created automatically along with the job itself. The first character "*J*" indicates that this is a job code, letters afterwards can be either *VACANT* (meaning that no expert has been assigned to the job) or represent the assigned freelancer code. The number is the value of freelance job counter for the assigned freelancer. Each freelancer has independent code counter for this code. If freelance jobs are reassigned to a different freelancer, their codes (both letters and counter) change accordingly.

Freelancer — freelance experts can be assigned and reassigned at will as long as this freelance job is not included in a purchase order. Freelance job must be removed from purchase order before the freelancer can be reassigned from it.

Name — this name does not need to include language pair or service name, since this data is being added separately. By default this is the name of parent client job. Freelance job name can be 100 characters long maximum.

Group — group of services. All services in Projetex are broken down into groups. You can select any of the groups of services available. To add or edit a group of services, open menu **Corporate Settings** in the **Backstage** view, and select Groups of Services section.

Service — each group of services contains a separate list of services. Before selecting a service, select group of services first. To add or edit a service, open menu **Corporate Settings** in the **Backstage** view, and select Services section.

Volume — job volume can be indicated in a number of units (characters, words, lines, hours and so on). To add custom units, open menu **Corporate Settings** in the **Backstage** view, and select Volume Units section.

You can also use built-in AnyCount or CATCount tools to quickly count volume of the job file, or calculate CAT text volumes (100% match, fuzzy match, and so on). You can import Trados and Logoport logs as well with the help of CATCount tool to quickly enter required volume.

Price — price can be entered manually or copied from client's individual price-list.

To copy price from price-list click **<=Price** button. Price for matching service, group of services and units will be copied.

Click **=>** button to copy the price to this client's price list.

You can set a fixed price for client job (which will not be multiplied by job volume) by selecting **flat fee** option in the drop-down list next to the price field. Select **free** option in the same drop-down list to set job total to zero. Price and volume in a free job must not necessarily be zero.

If the Freelancer currency differs from your base currency, **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *job*. Note that this button does not change general exchange rate stored in your Projetex database. To change exchange rate for all future jobs go to Exchange Rates tab of the Corporate Settings.

PO Folder — purchase order folders contain all files the freelancer would need to begin working on the job. When creating or editing freelance jobs it is often necessary to work with job files (for example you may need to copy the name of the file or count job file for exact volume).

Before creating a PO folder, create a purchase order itself by clicking **Create PO** button. This will create a purchase order containing this freelance job, or add this job to existing PO, if there are any. See for more details on JAs.

Once purchase order has been created, **PO Folder** tab becomes available. This tab can be used to access PO folder without opening any additional windows. Also, **PO Folder** tab can be used to quickly find and access a number of folders related to this job, like project folder, ftp folders of client and JA folders of job assignments in project.

Timeline — timeline of a freelance job in Projetex includes assigned, deadline dates and the date when the freelance job has been actually completed. Deadline and Completed values are taken into account when the program determines status of freelance jobs (like due today, overdue and so on).

You can use the buttons above the corresponding date fields to quickly set the assignment date to the current date, the deadline to the assignment date, or the completion date to the deadline or the current date.

Job Quality — job quality allows to evaluate quality of a job performed by a freelancers. It may contain any mark from 1 till 100. *Job Quality* can be displayed when you search freelancers using **Search** button. **Search** button is located on **Main tab** of **Freelancer window** and on **Freelance Team Tab** of **Project Window**.

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

Instructions — any instructions (like terminology to use) regarding a freelance job can be entered here in the form of plain text note.

Work Notes — staff notes can be entered here.

Custom Fields — freelance jobs information can be customized by adding custom fields for additional information not foreseen by default controls.

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

Audit — keeps track of when and by whom the project was modified.

Alerts — keeps track of messages received from the Projetex 3D Automation Engine.

You can save freelance job data in a printable file or print it with the help of *RTF templates*. To make this option available click **Apply** button first to save new entry in database of client jobs.

Templates for printing freelance job data can be edited with the help of menu **Settings > Current User**. Click **Templates** section to quickly access all template folders. Templates for printing freelance jobs are saved in *\...\BusinessServer\Templates\EXPERTS\FREELANCE\Jobs* folder.

Selecting experts

After Corporate and Freelance Jobs have been entered in the database, you can assign Corporate and Freelance experts to these jobs. The expert records are stored in your database, their profiles can be accessed and managed from the **Corporate Expert** window and **Freelancer** window respectively.

Only one expert can be assigned to an expert job. To have two experts working on the same client job, create a separate expert job for each expert.

Assigning a corporate expert to a corporate job will allow to create job assignments (or JA), and will also make this corporate expert see this job and access its files, provided by project manager in job assignment folder.

Assigning a freelance expert to freelance job will allow creating a purchase order (or PO) to this freelancer.

In Projetex, experts can be assigned to a job from the Edit Job window (Edit Corporate Job or Edit Freelance Job accordingly). The following tabs can be used to open such windows:

Edit Corporate Job – Tree tab of Project window, Corporate Jobs tab of Project window, and Corporate Jobs window.

Edit Freelance Job – Tree tab of Project window, Freelance Jobs tab of Project window, and Freelance Jobs window.

To assign an Expert to a job, open this job by double-clicking it, or selecting this job in the list and clicking Edit button. Click **Select** button in Edit Corporate/Freelance Job Window to assign an Expert to this job.

Expert choosers

When you assign an Expert to an Expert Job, the suitable candidate can be chosen in Expert Chooser dialog. Click Select button in the Edit Corporate Job or Edit Freelance Job window. You can search the list by expert's name by typing the name string in the field at the top of the window and selecting starts with or contains option.

Corporate Expert Chooser and Freelance **Expert Chooser** windows provide lists of in-house translators and freelancers accordingly, with the possibility to filter both. Use **Custom Filter** to set conditions of search and quickly find suitable candidate.

Creating Job Assignments

Job assignments (or "*JAs*") are printable requests which project managers send to in-house experts. Job assignments contain a number of *corporate jobs* and optionally — some *instructions*. Also, a folder can be automatically created for each *JA*, allowing project managers to copy workflow files for the specific expert to access.

To create a job assignment to translator:

1. Open **Main** tab of **Project** window.

2. Click required project.

3. Click **JAs** tab.

4. Click **New** button. You will be prompted to choose a corporate expert among those assigned to the project's jobs before being taken to the **New JA** window.

Job assignments can also be created directly from **Edit Corporate Job** window. To create job assignment this way:

1.   Open any corporate job, which has an expert assigned, but has not yet been added to a job assignment. Corporate jobs can be opened on **Corporate Jobs** tab of **Project** window.

2.   In **Edit Corporate Job** window click **Create JA** button.

New/Edit JA window contains the following data:

Date Assigned — job assignment date can be edited no matter when the JA has actually been created.

Code — unique code of job assignment is created automatically along with the job assignment itself. The first character "*JA*" indicates that this is a job assignment code, letters afterwards represent the assigned expert's code. The number is the value of corporate job assignment counter for the assigned expert. Each expert has independent code counter for the job assignment code.

Approved — once a job assignment has been approved by project manager, its corporate jobs become locked and cannot be edited unless this check box is cleared.

Expert Jobs — list of corporate jobs added to the JA. Only Jobs without a JA can be added.

Linked with Payments — to settle a JA, link it with your payments to the corporate expert. A JA can also be settled by creating "phantom payments". By adding a phantom payment you link the entire unlinked sum of this JA to a virtual payment (will not be shown on the Payments tab of the Corporate Expert window).

Instructions — any additional instructions which your JA must include, can be added on this tab

Notes — any additional notes which your JA must include, can be added on this tab.

Custom Fields - custom information can be entered or selected in proper custom fields on this tab. Custom database fields can be added in Projetex Server Administrator.

**Audit** — keeps track of when and by whom the JA was modified.

If the expert's currency differs from your base currency, the **Currency Exchange Rate** button will be available. By clicking this button, you may change the currency exchange rate used in this JA. Note that this button does not change the general exchange rate stored in your Projetex database. To change the exchange rate for all future JAs, go to the Exchange Rates tab of the Corporate Settings.
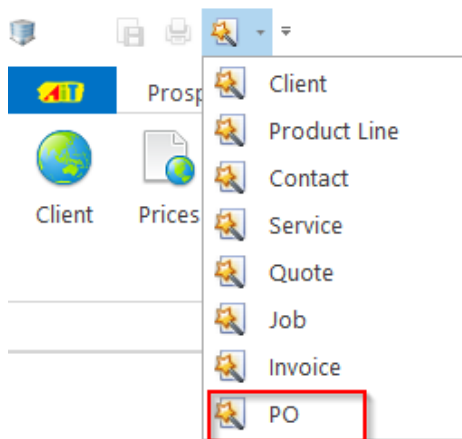
Creating Purchase Orders

Purchase orders (or *POs*) in Projetex are formal orders to a freelance expert requesting them to perform certain freelance jobs for certain fee.

To create a purchase order:

1. Open **Main** tab of **Project** window.

2. Click required project.

3. Click **POs** tab.

4. Click **New** button. You will be prompted to choose a freelancer among those assigned to the project's jobs before being taken to the **New PO** window.
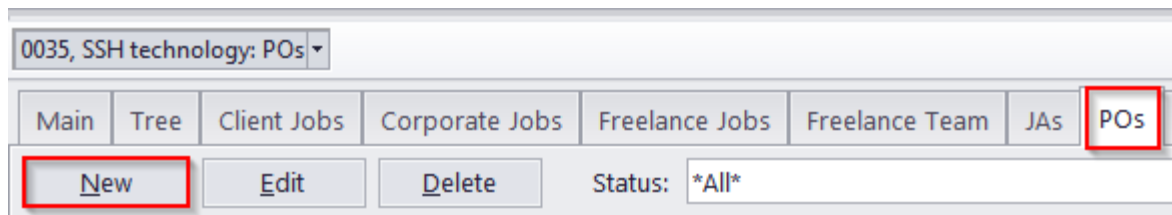
Alternatively, on the **Wizard** menu click **PO** command. This will start **New Invoice Wizard**.

Purchase orders can also be created directly from **Edit Freelance Job** window. To create purchase order this way:

1.   Open any freelance job, which has a freelancer assigned, but has not yet been added topurchase order. Freelance jobs can be found on the **Freelance Jobs** tab of **Project** window.

2.   In the **Edit Freelance Job** window click **Create PO** button.

3.   Freelance job can be added to existing purchase order, or to a new one. Click **Add this Job to New PO** string to create a new purchase order.

Freelance Jobs can be accessed in the following locations:

    Tree tab of **Project** window;

    Freelance Jobs tab of **Project** window;

    Freelance Jobs tab of **Freelancer** window;

    Calendar tab of **Project** window (double-click job Calendar block to edit that job);

    Calendar tab of **Freelancer** window (double-click job Calendar block to edit that job);

    Freelance Jobs window;

 Note: Alternatively purchase orders can be created by clicking **Mass POs** button on **POs to Freelancers** window.

New/Edit PO window contains the following data:

Date Sent — date when purchase order has been sent to freelancer. Payment terms of freelancer may refer to this date when determining paid status of the PO.

Code — also called "*Freelancer-specific*" code, generated automatically. "*PO*" characters indicate that this is a purchase order code, letters afterwards represent code of the freelancer, and the number is the value of PO counter for this freelancer. Each freelancer has independent counter for this code.

Global Code — global code is generated automatically. Outlay of global PO code can be configured in the **Codes** section of Projetex Server Administrator **Corporate Settings** tab. The non-configurable portion of the code (digits) represent the global PO counter value.

Approved — once a PO assignment has been approved by project manager, its freelance jobs become locked and cannot be edited unless this checkbox is cleared.

Freelance Jobs — list of freelance jobs added to this PO. Right-click this list and select **Customize columns** to configure displayed data.

Discount/Markup — POs can have up to 2 discounts and markups. These are applied as positive (markup) or negative (discount) percentage to PO subtotal. To configure discounts and markups, on the **Backstage** view click **Corporate Settings** and select **Discounts/Markups** section.

Tax — each PO can have up to 2 taxes. Taxes are applied as percentage to PO subtotals plus discounts/markups. To configure taxes, on **Backstage** view click **Corporate Settings** and select **Taxes** section.

Note: After a discount/markup or tax has been selected for a PO of some freelancer, this discount/markup or tax will be remembered and applied as the default for the appropriate freelancer. All next POs will include this discount/markup or tax. The default discount/markup or tax can be changed in any time, choosing another value during a PO creation.

If freelancer currency differs from your base currency, **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *PO*. Note that this button does not change general exchange rate stored in your Projetex database. To change exchange rate for all future POs, go to Exchange Rates tab of the Corporate Settings.

Expert Invoice — you can enter freelancer's invoice data for future reference. POs can be filtered by their invoiced status

Adjustment — adjustments added to PO totals. Discounts and taxes are not applied to adjustments.

Linked with Payments — to settle a PO, link it with your payments to freelancer. PO can also be settled by creating "*phantom payment*". By adding phantom payment you link all unlinked sum of this PO to a virtual payment (will not be shown on the **Payments** tab of **Freelancer** window).

Notes — any additional notes which your PO must include, can be added on this tab.

Custom Fields - custom information can be entered or selected in proper custom fields on this tab. Custom database fields can be added in Projetex Server Administrator.

Audit — keeps track of when and by whom the PO was modified.

Alerts — keeps track of messages received from the Projetex 3D Automation Engine..

Client Prices

Each client in Projetex can have a set of prices individual for this particular client. These prices can be assigned on the **Prices** tab of **Client** window.

Only one price per group of services, service and unit combination can exist in individual price-list.

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

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

Delete button deletes currently selected price.

Copy from General button opens **Copy from General Prices to Clients** window which can be used to copy prices from *general* price-list for clients to *client-specific* price-list.

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

Invoices to client

Invoices in Projetex are issued per client jobs. One invoice can contain a number of client jobs from different projects. Client job, which has been added to an approved invoice cannot be edited.

Invoices tab of the **Client** window is used to issue and keep track of invoices to currently selected client. All invoices issued to this client are displayed in the table.

New button opens **New Invoice** window, where a new invoice to client can be created.

Edit button opens **Edit Invoice** window, where details of currently selected invoice can be edited.

Delete button deletes currently selected invoice.

Void button voids currently selected invoice without deleting it.

Invoice Filters

You can view only fully paid or only unpaid (outstanding) invoices. To display only invoices with a particular status click **Status** filter drop-down list.

You can set Projetex to display only those invoices which have or have not been approved by project manager by applying **Approved** filter.

Invoice Statuses

Invoices in the list are shown in different colors. These determine current status of each invoice:

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

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

Red — invoice is *outstanding* and its *payment is overdue*.

Black — invoice has been *settled* (paid) or has been voided.

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

File Storage and Management

Projetex Folder Structure

BusinessServer Folder

Projetex automatically creates and maintains folder structure designed to streamline storage, linking and sharing your work files.

All workflow files (such as *client-sent files* and *files to be sent to clients*, as well as saved documents like *invoices*, *job assignments*, *purchase orders* and *quotes*) are stored in respective subfolders of *BusinessServer folder*, a centralized and unified folder, accessible by each team member within necessary limits and also local Business folders on Workstation computers.

The main purpose of *BusinessServer folder* is to be a centralized storage location for client folders, project folders, and expert folders (these folders are described below). By default it is created in the root of disk *C:* of PC where Projetex Server is installed.

Location of BusinessServer folder can be changed on **Folders** tab of **Corporate Settings** window. Having changed BusinessServer folder location you must move the content from the old BusinessServer folder manually.

Different folder types

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

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

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

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

Project folders (a separate folder is created for each project) are stored in *Business\Project* folder. Each folder name contains unique *project code*. Project folder name can also contain project name and project manager name.

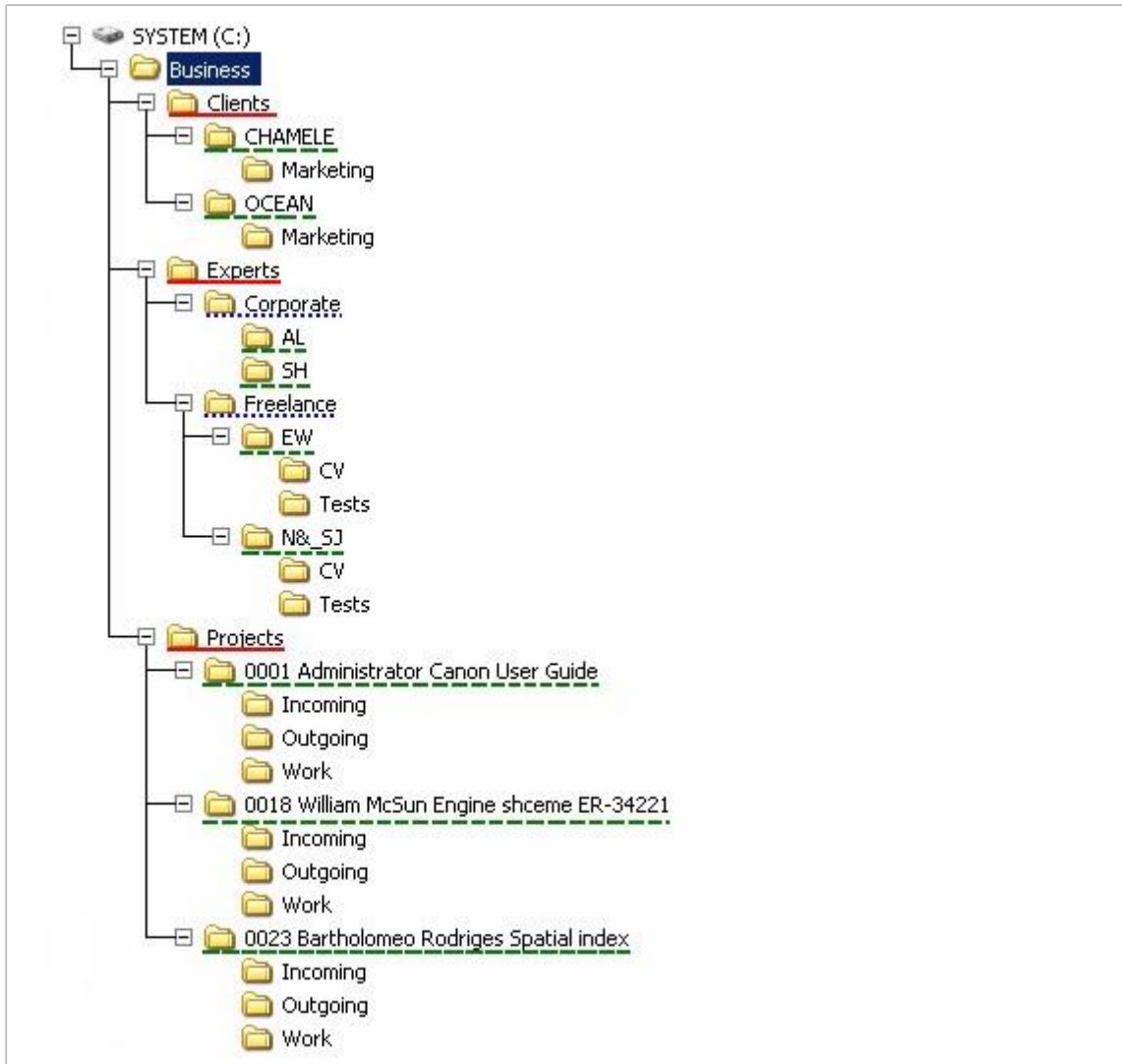The KB folder contains the folders of the knowledgebases created in Projetex.

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

The Output folder contains exported general Price lists.

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

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

These folders, as well as their subfolders are created automatically when Projetex Workstation user clicks the **Folder** button in respective areas of the program (like **Main** tab of **Project** window) or otherwise activates the File manager interface. Projetex can also automatically create such folders when needed (for example an *Expert* folder is automatically created upon this expert's login).

Example:

Sample structure of folders in Projetex

```
□ ➤ SYSTEM (C:)
   □ 📁 Business
      □ 📁 Clients
         □ 📁 CHAMELE
              📁 Marketing
         □ 📁 OCEAN
              📁 Marketing
      □ 📁 Experts
         □ 📁 Corporate
              📁 AL
              📁 SH
         □ 📁 Freelance
            □ 📁 EW
                 📁 CV
                 📁 Tests
            □ 📁 N&_SJ
                 📁 CV
                 📁 Tests
      □ 📁 Projects
         □ 📁 0001 Administrator Canon User Guide
              📁 Incoming
              📁 Outgoing
              📁 Work
         □ 📁 0018 William McSun Engine shceme ER-34221
              📁 Incoming
              📁 Outgoing
              📁 Work
         □ 📁 0023 Bartholomeo Rodriges Spatial index
              📁 Incoming
              📁 Outgoing
              📁 Work
```

Client\Prospect Folders

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

Each client folder can contain custom subfolders which will be created automatically along with a client folder. These subfolders can be specified on **Folders tab** of **Server Administrator Corporate Settings**.

Expert Folders (Corporate, Freelance, Applicant)

Primary purpose of every Expert folder is to serve as storage location for all files relevant to a particular expert. It can be created from **Main** and **Files** tabs of **Corporate Expert** or **Freelance Expert** window. The following subfolders are created automatically in Expert folder, depending on the document being saved:

- In *Corporate Expert's* folder: JAs, Corporate Jobs

- In *Freelance Expert's\Appilcant's* folder: Quotes, Prices, POs, Payments

 Note: When a PO/JA is saved using RTF template, a resulting file is stored in a separate folder (it's name will contain PO/JA Code) and the link to this file is saved in the Pos/JAs subfolder of the expert's folder.

Each expert's folder can contain custom subfolders which will be created automatically along with an expert folder. These subfolders can be specified on the **Folders tab** of **Server Administrator Corporate Settings**.

Project Folders

Primary purpose of every *Project* folder is to serve as a storage location for all files relevant to a particular **Project**. It can be created from **Main** and **Files** tabs of **Client** window. It is created automatically when any project-related document is saved.

Each project's folder can contain custom subfolders which will be created automatically along with a project folder. These subfolders can be specified on the **Folders tab** of **Server Administrator Corporate Settings**. By default, this includes three folders: Incoming (files received from the client, e. g. text to be translated), Work (files currently being written or processed) and Outgoing (completed work to be sent to the client).

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

File Sharing and Synchronization

Projetex uses own file sharing and synchronization system, which does not require configuring of any additional folder sharing settings on your server PC. All files stored in *BusinessServer* folder can be downloaded, updated, uploaded in Projetex Workstation.

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

> **Note:** All users running Projetex Workstation on the same PC have one common local repository folder and work with the same local files.
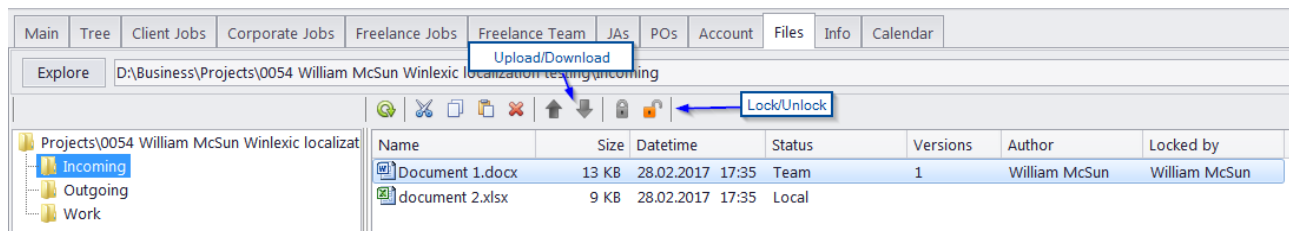
File statuses and operations with files

When a user opens a file, he or she in fact opens a downloaded copy of a file stored in *Business* folder. To update this file on server, user will need to upload this file to Projetex Server PC by right-clicking the file and then clicking **Upload** on the drop-down context menu, or clicking the **Upload** button on the toolbar above the files list.

Each file or folder can have one of the following statuses:

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

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

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

Team - Missing - file exists on server, but has not been downloaded to a local PC yet (or have been deleted locally).

Local - file exists locally, but has not been uploaded to server yet (or have been deleted on server).

Locking files

When a file exists both locally and on server (i.e. it has status **Team**, **Team - Changed on**

Workstation, **Team - Changed on Server** or **Team - Missing**), it can be locked using **Lock** button. In this case only a user, who locked the file, will be able to change it on server. Other users will be able to *download* the locked file but *upload* option will be denied for them. Thus the user who are working with this file can be sure that the file will not be replaced on server by other users.

If a user forgets to unlock their locked files after working on them, but another user needs to work with the same files, he or she can right-click on the locked file and click **Break Lock** button. Then file will be unlocked and it can be locked by another user. **Break Lock** does not affect files locked by the current user. Use the **Unlock** button to unlock such files.

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

Note: It is advisable to lock file every time when you work with it, because in this case all users will be able to see that someone is working with the file. Thus you will not get a situation when several users work with the same file and then upload changes on server. Only your changes will be accepted by server.

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

Working with files in Projetex

Files of any particular client, project, or expert can be viewed with the help of **Files** tab, available in each **Client**, **Project** and **Expert** window in Projetex. Folders are opened in Projetex' built-in file manager. The interface of the Projetex file manager is very much like the interface of Windows Explorer with some additional options to enhance the management of your workflow files. This includes related folders and FTP access.

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

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

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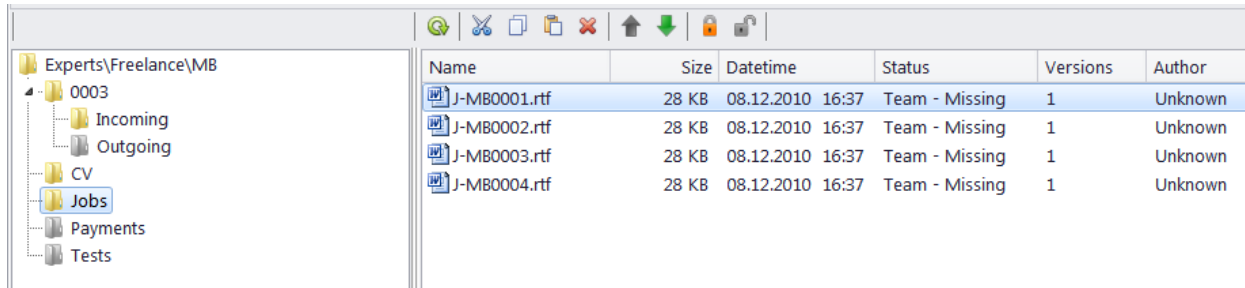
Folder creation options in different Projetex windows

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

Also **Edit Job** windows have files access tabs for quick access to job work files. These tabs are:

- Project Folder for client jobs

- JA Folder for corporate jobs

- PO Folder for freelance jobs

Each of these folder types has a number of own related folders. Use **Related Folders** drop-down list to quickly open any of them in the field to the right. The following folders can be quickly accessed from **Edit Job** windows:

New Client Job (**Edit Client Job**) — *Project* folder of related project. Related folders options:

- **FTP client**
- **JA folders** of corporate jobs belonging to selected client job

- **PO folders** of freelance jobs belonging to selected client job

- **Client folder** of respective client.

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

- **Project folder** of respective project

- **FTP client**

- **JA folders** of corporate jobs belonging to the same project

- **PO folders** of the rest of freelance jobs belonging to this project

New Corporate Job (**Edit Corporate Job**) — JA folder of related job assignment. Related folders options:

- **Project folder** of respective project
- **FTP client**
- **PO folders** of freelance jobs belonging to the same project
- **JA folders** of the rest of corporate jobs belonging to this project

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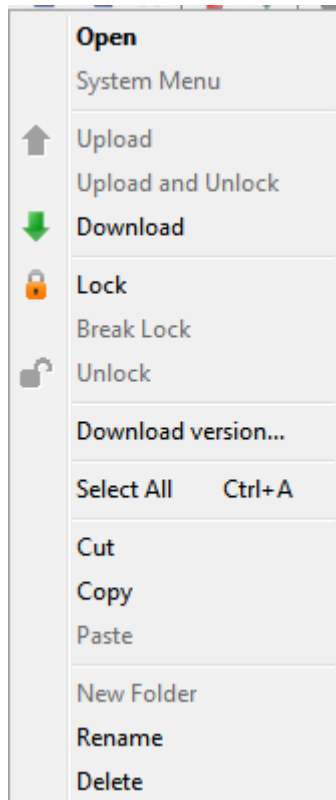
When a user right-clicks on files or folders in **Files** tab, **Contextual Menu** is called. It has the following options:

Open - open a file using a default application.

System Menu - calls *Contextual Menu of Windows*.

Upload - upload selected files on *server*.

Upload and Unlock - upload selected files on server and unlock files which have been locked by the current user.

Download - download selected files to a *local PC*.

Lock - lock selected files.

Break Locks - unlock selected files locked by another user. It does not affect on files locked by the current user.

Unlock - unlock selected files locked by the current user.

Download versions - open **File versions** window to load a previous version of a selected file.

**Cut/Copy/Paste** - cut, copy or paste files and/or folders.

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

Rename - rename a folder.

Delete - delete selected folders.

Shortcuts

Shortcuts contain information relevant to currently open folder. For example, manager working with project files might also need access to purchase orders and job assignment folders. To quickly open folders of particular project's POs and JAs, this person can use **Shortcuts** area.
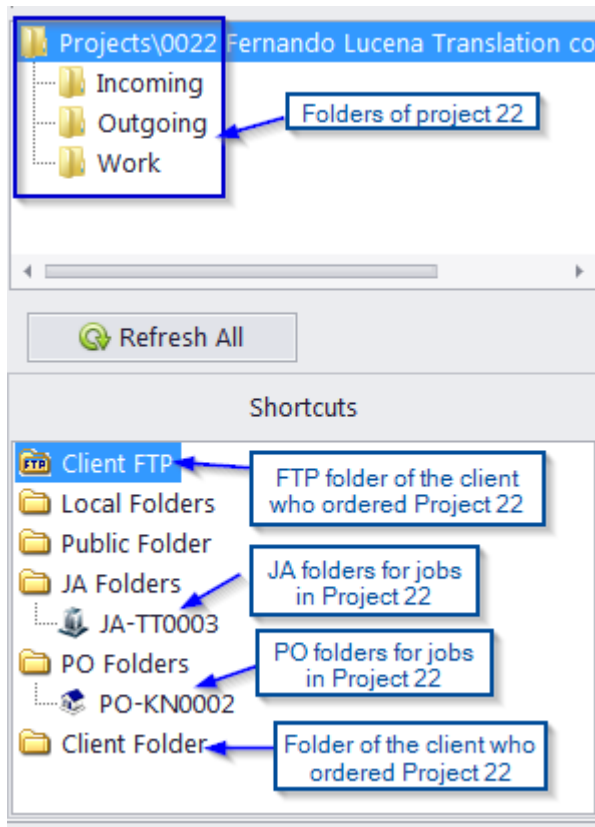
Shortcuts vary, depending on the context.

- *Client related folders* are: *Project* folders of this client's projects.

- *Project related folders* are: *Job Assignment* folders, *Purchase Order* folders, *Client* folder of selected project.

- *Corporate expert related folders* are: *Job Assignment* folders of selected expert.

- *Freelance expert related folders* are: *Purchase Order* folders of selected expert.

Shortcuts list can also be used to open any folder on local PC, as well as to connect and work with FTP folder.

- Select **Local Folders** option to open folders on local PC.
- Select **Public Folder** to open the shared folder available to all workstation users.

- Select **Client FTP, Expert FTP or Freelancer FTP** to connect and work with FTP folders.

Note: If you change the client code or expert name (it can be done from **Main** tab of the **Client** or **Expert** window respectively, Projetex will attempt to rename the appropriate folder.

Note: The location of BusinessServer folder is specified on the setup stage and can be changed on **Folders** tab of **Advanced Settings** window.

FTP folders access

Projetex features built-in FTP client, which can be used to quickly access FTP folders of clients and experts to upload or download workflow files.

To access FTP client:

1. Open **Files** tab of any client, project or expert.

2. In **Shortcuts** field select **Client/Expert/Freelancer FTP** option.

FTP access interface

FTP indicator indicates connection status. Red indicator is displayed if FTP server status is disconnected. When the server is connected, indicator will change to green.

Click **Connect/Disconnect** button to connect/disconnect to currently selected FTP server in nearby drop-down list.

Click **Manage Connection** button to create new FTP connection, edit or delete currently selected FTP connection.

Creating new FTP Connection

In order to connect to FTP folder you will need to create an **FTP Connection** for this folder, which implies entering FTP server address, and login information, which later will be used by Projetex to log in to this FTP folder.

To create a new connection:

1. Click **Manage Connections** button

2. Select **New connection ...** in the menu:

3. Enter a name of new connection, FTP server address, user name (FTP login) and password (Projetex will memorize your password).

4. Click **OK** button to create this FTP connection.

Connecting to FTP

Once FTP connection has been created, it can quickly be activated with the help of **FTP connections** drop-down list.

1. Select the required **FTP Connection** in the drop-down list to connect to this FTP server.

2. Click **Connect** button to display the contents of FTP in the field below.

File versions

Any changes to files stored on server are tracked. When the file has been changed, previous version is saved as a separate file to the *Versions* subfolder within *BusinessServer* on Server Administrator computer.

It is possible at any time to restore any version of the file in **Files** tab of **Client**, **Project**, **Corporate Expert** and **Freelancer** window.

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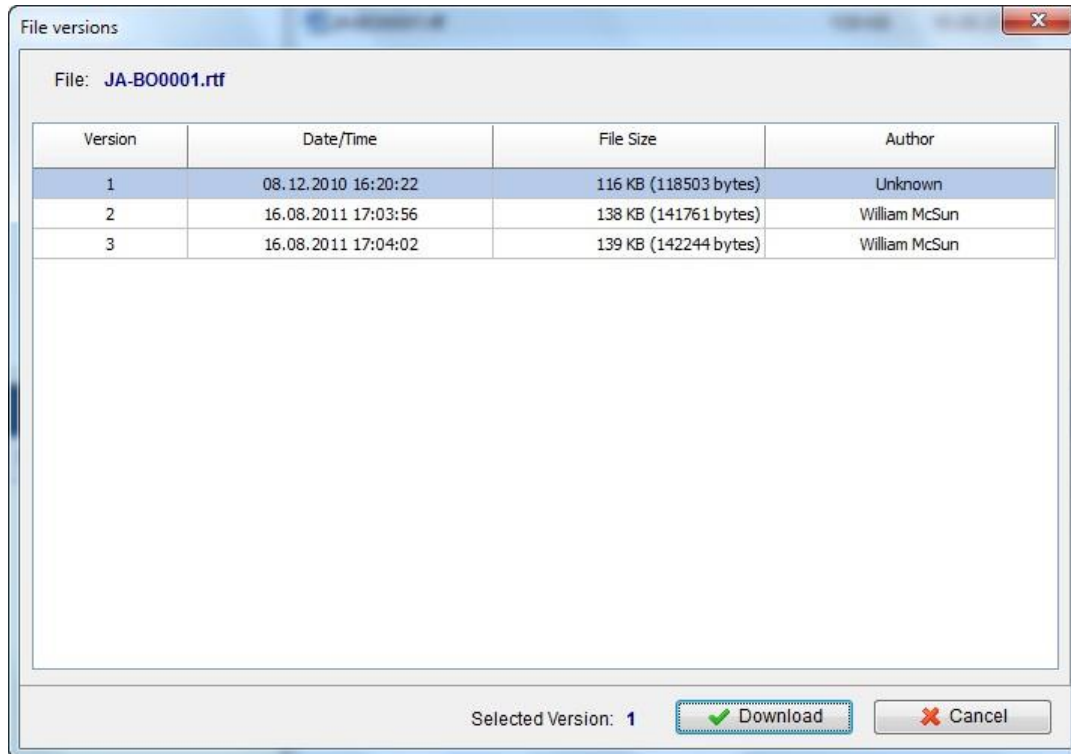

Table of file versions shows the version number, modified date and time, file size and author.

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

Mass File Operations

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

Clicking it will reveal two options: **Upload Changes** and **Clear Locks**

Upload Changes

To open **Upload Changes** window, click **Team** and then click **Upload Changes** button. Projetex will find all unloaded on server and modified locally files and sort them by the following tabs:

- **Clients** tab contains unloaded modified files from clients folders;

- **Projects** tab contains unloaded modified files from projects folders;

- **Corporate experts** tab contains unloaded modified files from corporate experts folders;

-
Freelancers tab contains unloaded modified files from freelancers folders.

By default, all modified files are selected to upload. To avoid loading of some files, deselect checkboxes opposite to names of these files. Then click **Ok** button to start uploading.

Important Notice: Only those files which have been already *locked* will be added to the list of unloaded modified files .

Clear Locks

To open **Clear Locks** window, click **Team** and then click **Clear Locks** button. Projetex will find all locked files and sort them by the following tabs:

- **Clients** tab contains locked files from clients folders;

- **Projects** tab contains locked files from projects folders;

- **Corporate experts** tab contains locked files from corporate experts folders;

- **Freelancers** tab contains locked files from freelancers folders.

By default, all locked files are selected to unlock. To avoid unlocking of some files, deselect checkboxes opposite to names of these files. Then click **Ok** button to start unlocking.

Important Notice: If you cleared locks of files and these files are unloaded on server and modified locally, they will not be displayed in **Upload Changes** window.

Note: Projetex will display only those unloaded modified files or locked files which have been locked by the current user.