Projetex 3D Migration Guide

**A Guide to Ease Your Migration to Projetex 3D
from Other Versions of Projetex**

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Introduction

If you are reading this guide, you most likely are the proud owner of a copy of Projetex—our dedicated, business-level translation project management software.

It also means that you recently have or are considering upgrading from your current version of Projetex to our newest offering in this software line: Projetex 3D.

Projetex 3D is a major update with extensive changes, including an overhauled User Interface and a new database engine. Furthermore, there is greatly expanded functionality: new Dashboard and Knowledgebase modules, management of prospects and applicants, Dynamic Reports, a Global Search function, and more.

This migration guide will help you transition smoothly into the enhanced system of Projetex 3D, allowing you to make the most use of its full potential!

Upgrading to Projetex 3D from Earlier Versions

If you are currently considering purchasing Projetex 3D, you can see the prices at http://www.translationmanagementsoftware.com

The price depends on the number of simultaneously active workstations it supports and the version of Projetex you currently own.

Database Conversion

Once you install Projetex 3D Server Administrator, you will notice that it uses a different database engine from our previous version of Projetex (see Key Differences from Earlier Versions).

So how can you use the already extensive database in Projetex 3D? Easy! Projetex 3D comes bundled with a special piece of software called the Projetex 3D database converter.

This handy little program will ensure that none of the data you have gathered so far will be lost, and it will save you the pain of manual re-entry.

Using the Projetex 3D Database Converter

The Projetex 3D database converter is quite easy to use. In fact, when you start, the first screen you see will give you directions to the most likely location of the Projetex 10 database file.
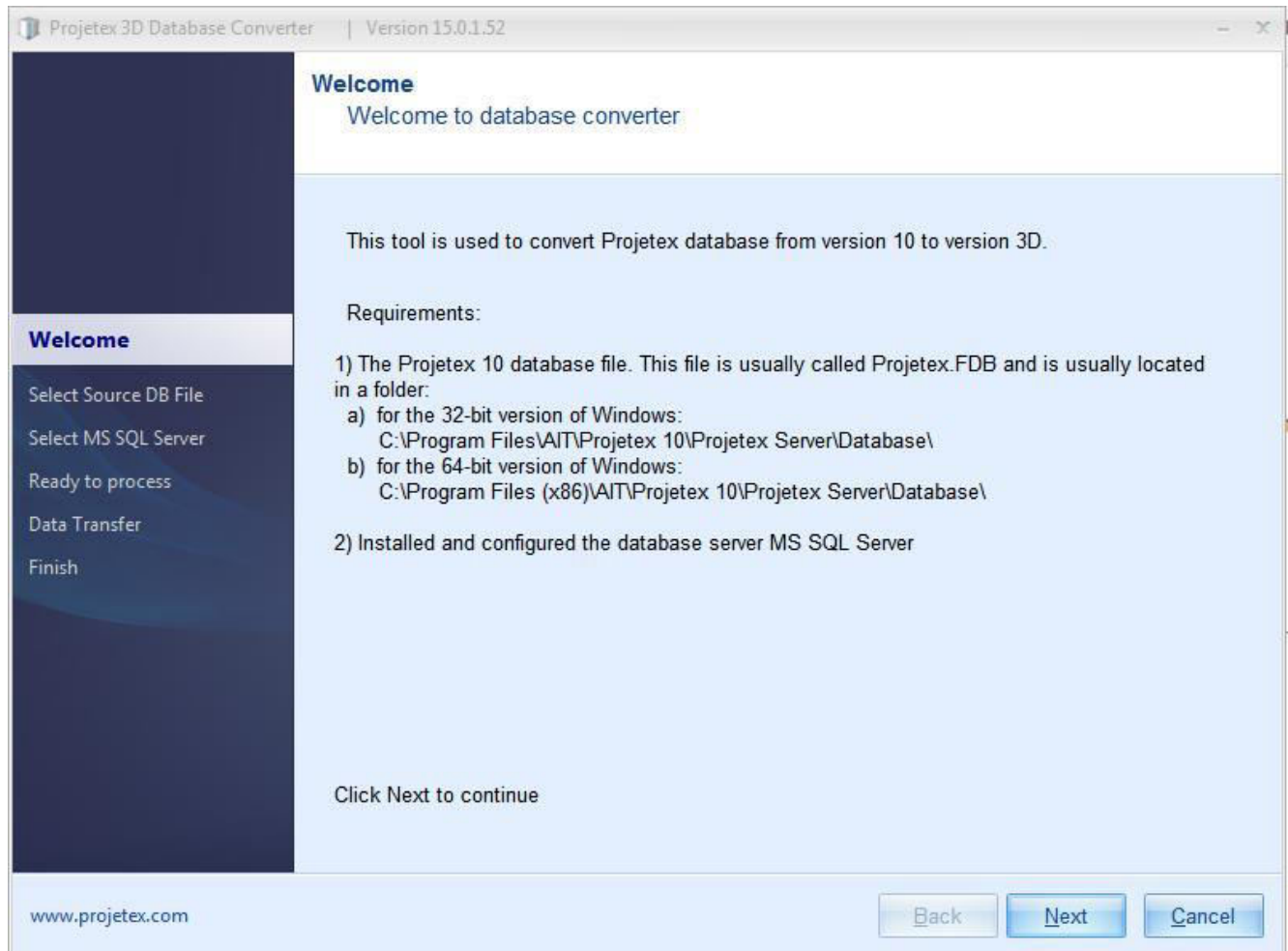
In the next two screens, you will navigate to the folder that contains your Projetex 10 database file (select the file itself in the lower field) and select the currently active Projetex 3D server.

If you installed Projetex 3D with the demo or empty database, the "Ready to process" screen will inform you that a Projetex 3D database already exists.
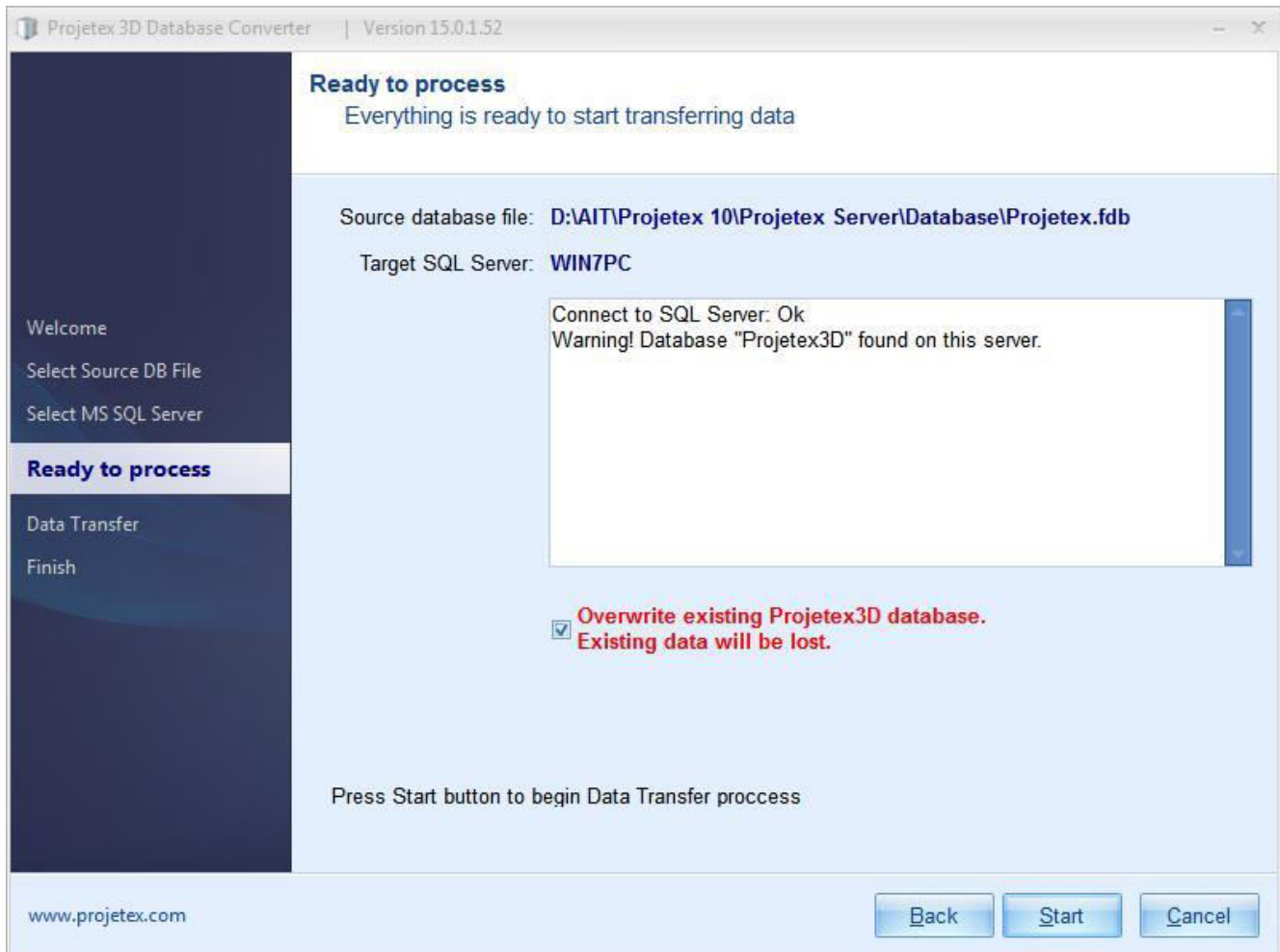
Check the "Overwrite existing Projetex 3D database" box and click Start. (Make sure that Projetex 3D is not currently running. A database in use will not be altered.)

After the transfer is complete, your Projetex 10 database will be ready for use in Projetex 3D.

# Key Differences from Earlier Versions

The MS SQL Database Engine

Projetex 3D has transferred from the Firebird database engine to MS SQL. This means that users of previous versions will need to convert their existing databases into the new format, using the bundled database converter, to use them in Projetex 3D (see Upgrading to Projetex 3D from Earlier Versions).

Overhauled UI

Perhaps the most noticeable change in Projetex 3D, compared to previous versions, is the major User Interface overhaul. There are several aspects to this.

Navigation Bar and Repositioned Toolbars

Due to the expanded functionality of Projetex 3D, the toolbars giving access to the main tables of Projetex 3D have been singled out into a larger section called the Workspace. You can access the Workspace via the new Navigation Bar near the bottom of the screen:
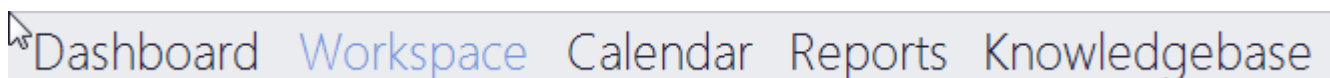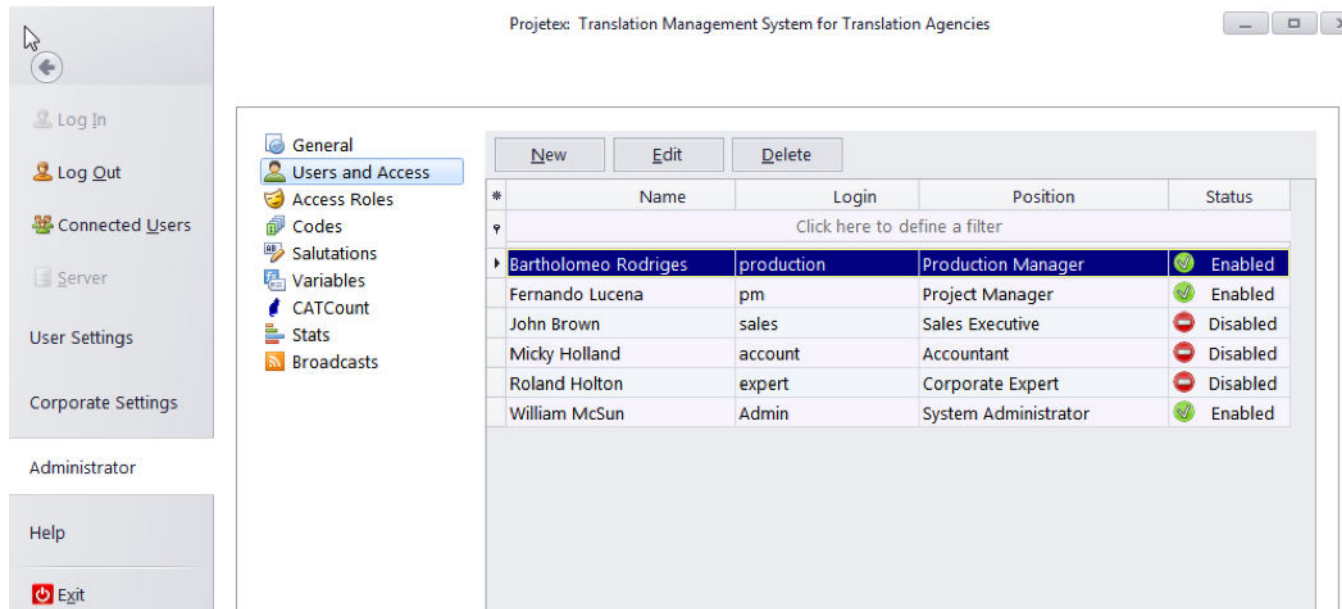
The toolbars have also been moved from the left-hand sidebar of the previous versions to the "Ribbon" near the top of the screen. The Export and Print buttons are now in the top-left corner of the screen while the Global Date Filter, along with the new Global Search function, is near the top-right corner.
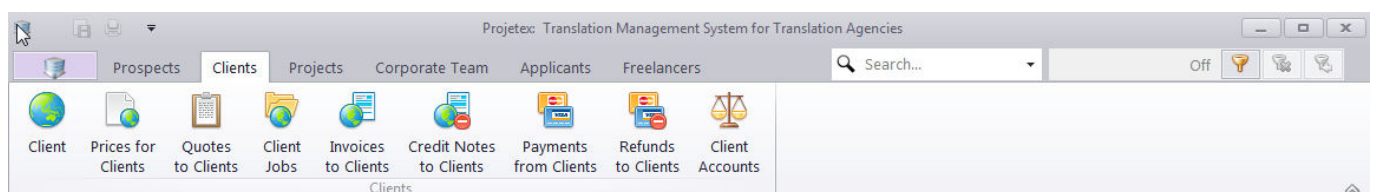
The Backstage View

By pressing the Backstage view tab, located to the left of the Prospects tab, you will enter the Backstage view.

The most important feature of the Backstage view is that the User\Corporate settings and a large portion of the Administrative settings have moved here from the main window of the Projetex workstation and the Server Administrator, respectively.

Now, only Folders, Fields, Queries, and Report templates are controlled by the Server Administrator application. The other functions (General settings, Users, Access Roles, Codes, Salutations, Variables, CATCount settings, Stats, and Broadcasts) can now be found in the Backstage view under the "Administrator" tab.

Overhauled Calendars and Reports Sections

The Schedule tables for Projects and Jobs have been renamed into Calendars and moved from their respective Ribbon tabs into a separate section on the Navigation bar.
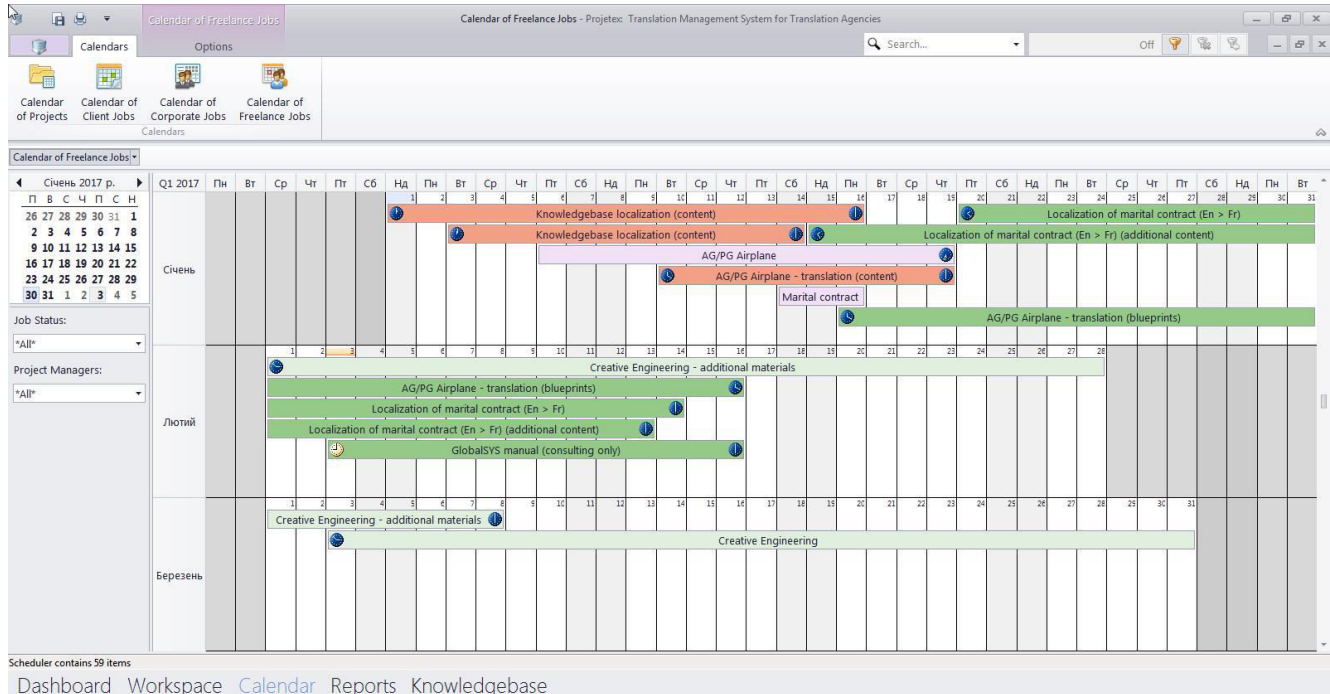

This will allow you to manage all Calendars from a single location.

The Reports section is also accessible from the Navigation bar now. It also includes the new Dynamic Reports, which allow you to define your own Report parameters and effortlessly move elements around.

History Function Overhaul

Table viewing history is no longer managed by simple "Back" and "Forward" buttons. Instead, each table viewed opens as a separate sub-window in the main window. The sub-windows can be moved around and resized, and you can switch between them using the tabs under the Ribbon.
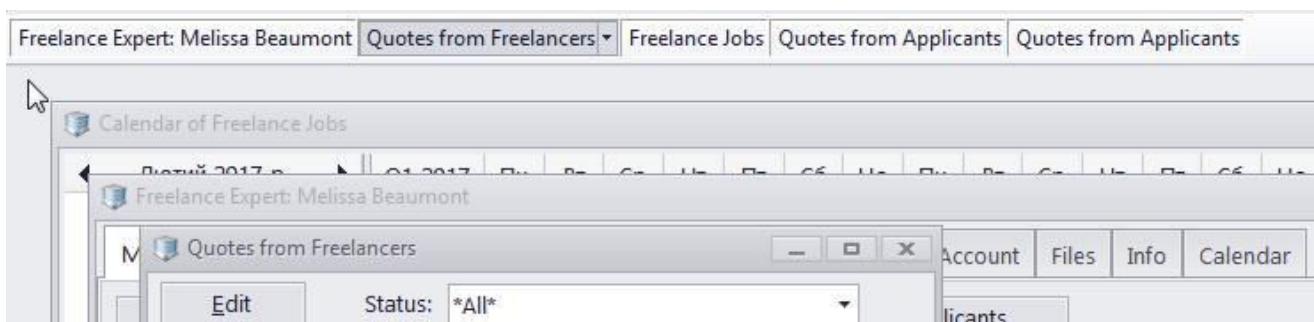
Overview of New Features

Apart from changes and enhancements to existing features, Projetex 3D also boasts a plethora of new features.

Prospects

This is a new tab in the Ribbon meant to help the company's sales department manager gather and sort information on prospective clients as well as track the progress of negotiations and then quickly convert them to actual Clients.
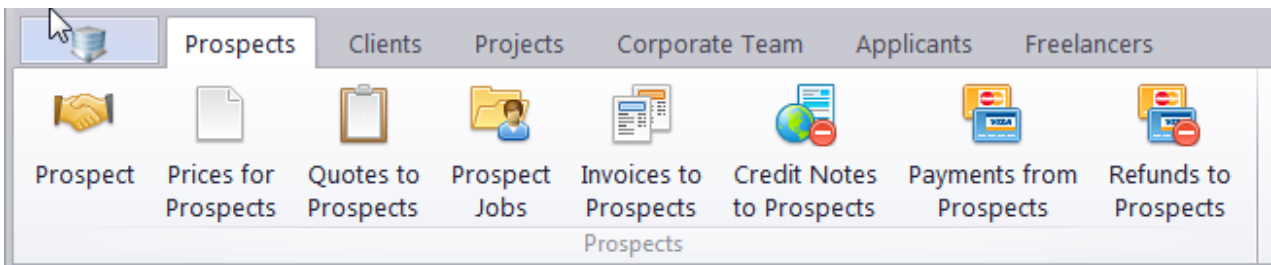

Applicants

Another new tab in the Ribbon, this one was designed for human resources managers. Track promising new translators; gather info on their rates, skills, and qualifications; and once they are hired, quickly convert them into Freelancers.
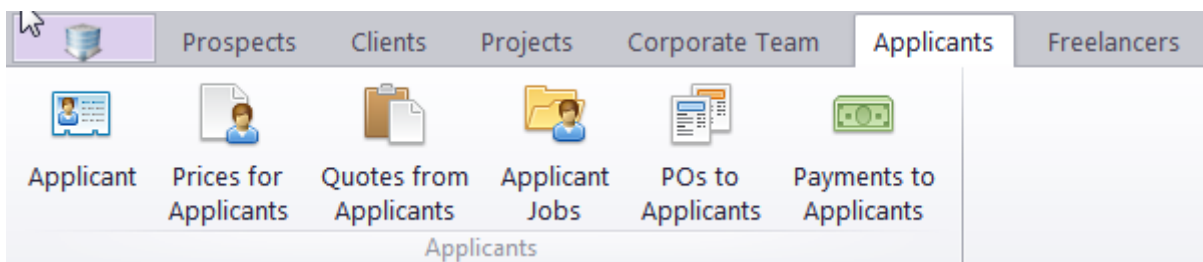
Knowledgebase

A new section accessible via the Navigation bar, the Knowledgebase will allow you to quickly and efficiently collect and manage various internal guides, instructions, and manuals and then grant access to the relevant info to your Project Managers, Experts, Sales representatives, HR managers, and Accountants.
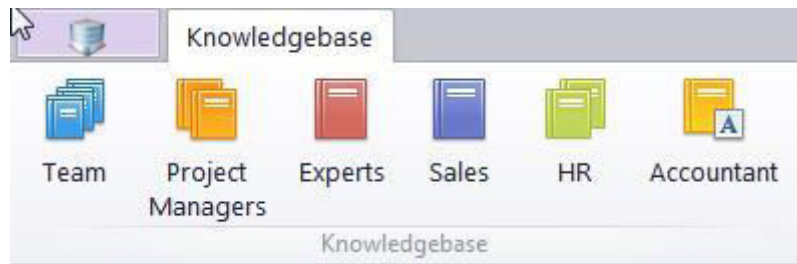
Built-In Mail Sender

The new Mail Sender will allow you to create templated documents (price lists, receipts, business offers, and more) in just a few clicks and send them via email directly from Projetex. To access the Mail Sender, click the "Send E-mail" button in the Edit window for a table entry or in the bottom-right corner of the "Prices" tables (Prices for Prospects, Clients, Corporate Experts, Applicants, Freelancers).
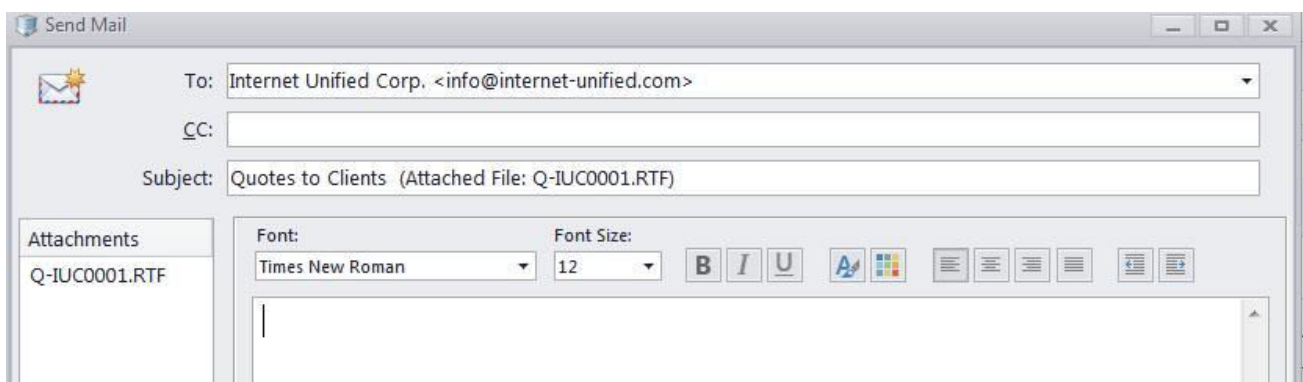
Dashboard

A new, convenient way to see all the essential information at once without having to scour multiple tables. If you want to see more detailed information, just click a widget to open the corresponding table. You can access the Dashboard via the Navigation bar.
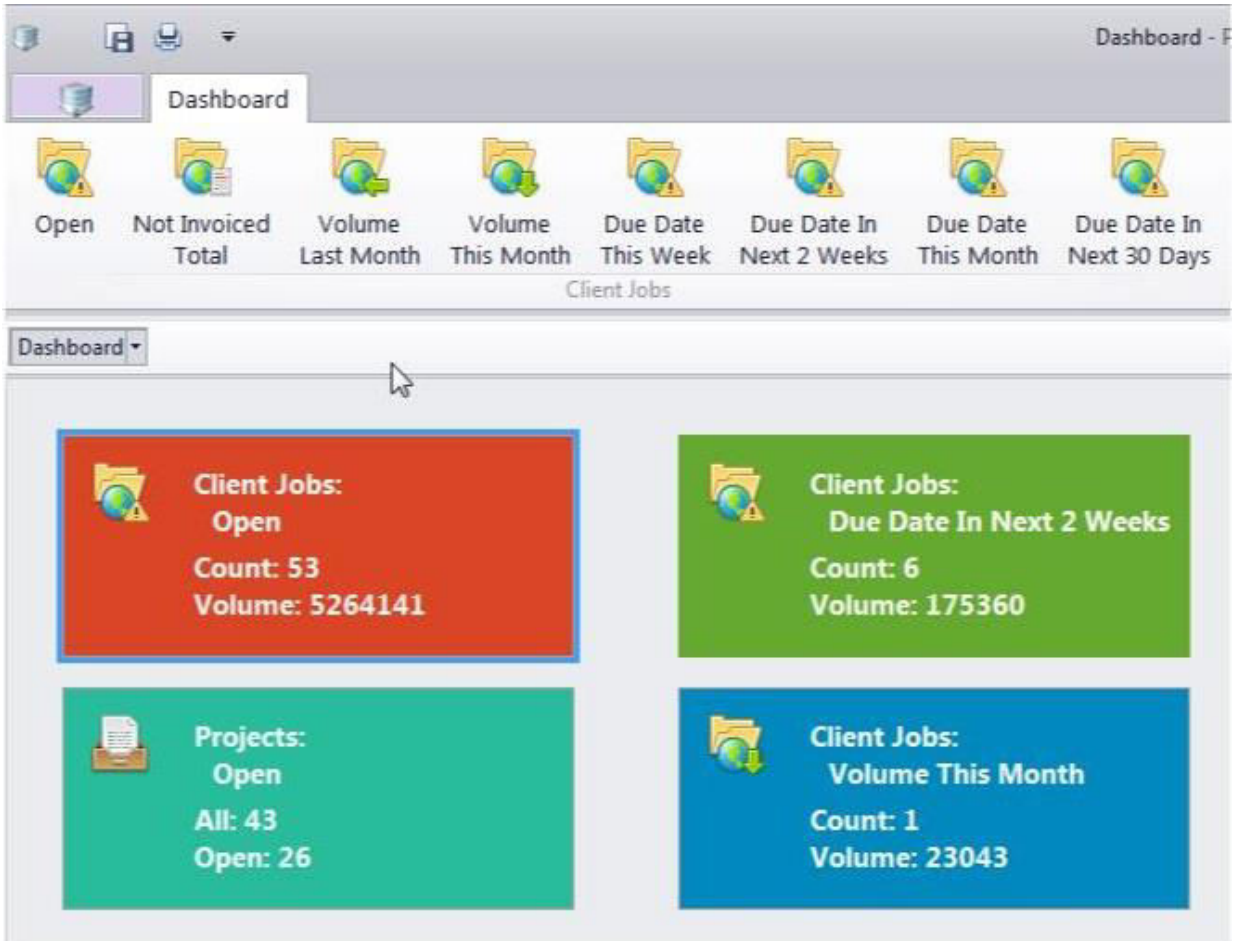
Global Search

The new Global Search function allows you to find ALL the documentation on a specific topic in your database and refine the results afterward. The results are separated into the "People" and "Objects" tabs and automatically sorted by the context in which they appear. Double-clicking an item in the results will take you to the corresponding table.

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Dynamic Reports

The Reports section functionality has been greatly expanded with the new Dynamic Reports, allowing you to set your own report parameters and drag and drop elements into place. You can also filter the data to be displayed, so, at any given moment, you will see only the information you are looking for.

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