



## **Projetex 9 Help**

© 2011 Advanced International Translations

# Table of Contents

<b>Welcome</b>	<b>7</b>
<b>Disclaimer</b>	<b>7</b>
<b>System Requirements</b>	<b>8</b>
<b>Projotex Setup</b>	<b>8</b>
<b>Registration/Upgrade</b>	<b>10</b>
<b>Upgrade to Projotex 9</b>	<b>12</b>
<b>Getting Started</b>	<b>13</b>
User Login to Projotex Workstation.....	13
LAN Connection to Projotex Server.....	14
Internet Connection to Projotex Server.....	15
<b>Basic working procedures</b>	<b>15</b>
Project manager basic working procedures.....	15
Accountant basic working procedures.....	17
Corporate expert basic working procedures.....	19
Corporate Jobs tab (for Expert) .....	20
Editing Corporate Jobs (for Expert) .....	21
JAs page (for Expert) .....	22
Files page (for Expert) .....	22
<b>Common Functions</b>	<b>23</b>
Sorting records.....	23
Columns Customization.....	23
Moving columns.....	24
Tables with Pages.....	25
<b>General Features</b>	<b>26</b>
Account Management.....	26
Client Accounts .....	26
Creating an account .....	27
Account Managers .....	27
Default Account .....	28
Currencies Management.....	29
Base Currency .....	29

Adding Currencies and Exchange Rates .....	30
Client/Freelancer Currencies .....	30
Currencies in Prices .....	31
<b>Wordcount Tools.....</b>	<b>31</b>
AnyCount in Projetex .....	31
CATCount in Projetex .....	32
<b>Projetex Interface</b>	<b>33</b>
<b>Common Interface Options.....</b>	<b>33</b>
Button Panel .....	33
Navigation Panel .....	35
Contextual Menu .....	38
Local Custom Filter .....	39
Local Report Export .....	39
Global Date Filter .....	39
<b>Projetex Menu Bar.....</b>	<b>40</b>
Workstation .....	40
Navigation .....	41
New ... .....	41
Team .....	42
Custom Reports .....	42
Settings .....	42
Help .....	42
<b>Export Window .....</b>	<b>43</b>
Export .....	43
Export to XLS, CSV or TXT .....	43
Export to HTML .....	43
Export to RTF .....	44
Export to PDF .....	45
<b>General Clients Windows.....</b>	<b>45</b>
<b>Client Window .....</b>	<b>45</b>
Main Tab of Client Window .....	46
Postal address of client.....	48
General contact information.....	49
Payment terms of client.....	49
Next client codes.....	49
Locale format of client.....	49
Invoicing policy of client.....	50
Client FTP connections.....	51
<b>Client Jobs .....</b>	<b>52</b>
<b>General Windows of Corporate Team.....</b>	<b>53</b>
<b>Corporate Expert Window .....</b>	<b>53</b>
Main Tab of Corporate Expert Window .....	53
Contact Information of Expert.....	55
Assign Next Expert Codes.....	55
Expert FTP connections.....	55
<b>General Freelancers Windows.....</b>	<b>56</b>
<b>Freelancer Window .....</b>	<b>56</b>
Main Tab of Freelancer Window .....	57
Postal address of freelancer.....	58
General Contact Information of freelancer.....	59

Payment Terms of Freelancer.....	59
Locale Format of Freelancer.....	59
Next Codes of Freelancer.....	60
<b>Projetex Server interface.....</b>	<b>60</b>
Corporate Settings .....	60
<b>Projetex Operations</b>	<b>61</b>
<b>Managing Clients.....</b>	<b>61</b>
Adding/Editing Client Profile .....	61
Cloning a Client .....	62
Adding/Editing Contacts of Client .....	62
New/Edit Contact Window .....	63
Creating Accounts .....	63
Assigning Account Managers .....	64
Setting Default Account .....	64
<b>Managing Experts.....</b>	<b>65</b>
Adding/Editing Experts .....	65
Searching freelancers .....	65
Creating Corporate Expenses .....	66
<b>Managing Prices and Services.....</b>	<b>67</b>
Managing General Price List .....	67
Managing Individual Price Lists of Clients and Freelancers .....	67
Copying Individual Prices from General Price List .....	68
Managing Services .....	68
Managing Volume Units .....	68
<b>Managing Quotes.....</b>	<b>69</b>
Creating Quotes .....	69
New/Edit Quote Window .....	69
Creating Draft Client Jobs .....	70
New/Edit Draft Client Job Window .....	71
Saving and Printing Quotes .....	71
<b>Managing Projects and Jobs.....</b>	<b>72</b>
Creating a project .....	72
Creating client jobs .....	74
New/Edit Client Job window .....	74
Creating corporate jobs .....	76
New/Edit Corporate Job window .....	76
Creating freelance jobs .....	78
New/Edit Freelance Job window .....	78
Saving and Printing Projects and Jobs .....	80
<b>Managing Invoices.....</b>	<b>82</b>
Creating Invoices .....	82
New/Edit Invoice Window .....	83
Saving and Printing Invoices .....	84
Void Invoices .....	85
Mass invoicing .....	86
Managing Global Codes .....	88
<b>Managing Purchase Orders.....</b>	<b>88</b>
Creating Purchase Orders .....	88
New/Edit PO Window .....	90
Mass purchase orders .....	92

Saving and Printing Purchase Orders .....	94
<b>Managing Job Assignments.....</b>	<b>95</b>
Creating Job Assignments .....	95
New/Edit JA Window .....	96
Saving and Printing Job Assignments .....	97
<b>Managing Payments.....</b>	<b>98</b>
New/Edit Payment Window .....	98
Linking Payment with Invoices or POs .....	98
Mass Payments from Clients .....	99
Mass Payments to Freelancers .....	101
Saving And Printing Payments .....	104
<b>Import.....</b>	<b>105</b>
<b>Importing Database .....</b>	<b>105</b>
Data import procedure.....	106
Importing from .xls.....	109
Importing from .dbf.....	110
Importing from .txt.....	111
Importing from .csv.....	112
Importing from .xml.....	113
Using scenarios for Import Utility.....	114
<b>Importing Custom Queries .....</b>	<b>114</b>
<b>Importing Custom Reports .....</b>	<b>115</b>
<b>Export.....</b>	<b>115</b>
Exporting from Projetex Workstation .....	115
Exporting from Projetex Server .....	117
 <b>Projetex Administration</b>	 <b>118</b>
<b>Projetex Workstation settings.....</b>	<b>118</b>
<b>Corporate Settings .....</b>	<b>118</b>
Groups of Services.....	118
Services .....	119
Volume Units.....	119
Currencies.....	119
Exchange Rates.....	120
Taxes .....	120
Discounts/Markups.....	120
Countries.....	121
Categories.....	121
Payment Methods.....	121
Templates.....	121
<b>Current User Settings .....</b>	<b>122</b>
AnyCount.....	122
Colors: General.....	124
Colors: Statuses.....	125
Fonts and Sizes.....	126
Position of Custom Fields.....	126
Schedules.....	127
<b>Projetex Server settings.....</b>	<b>127</b>
<b>Corporate Settings .....</b>	<b>127</b>
General Section of Corporate Settings Tab.....	127
Users and Access Section of Corporate Settings Tab.....	128
ODBC Access Section of Corporate Settings Tab.....	129

Access Roles Section of Corporate Settings Tab.....	129
Codes Section of Corporate Settings Tab.....	129
Folders Section of Corporate Settings Tab.....	129
Salutations Section of Corporate Settings Tab.....	131
Custom Fields Section of Corporate Settings Tab.....	131
Custom Variables Section of Corporate Settings Tab.....	132
Custom Queries Section of Corporate Settings Tab.....	133
Custom Reports Section of Corporate Settings Tab.....	133
CATCount Section of Corporate Settings Tab.....	133
Sound Alerts Section of Corporate Settings Tab.....	134
<b>Database Administration.....</b>	<b>134</b>
<b>Starting and Stopping Database Server .....</b>	<b>134</b>
<b>Switching database offline or online .....</b>	<b>135</b>
<b>Backup .....</b>	<b>135</b>
<b>Quick Optimization .....</b>	<b>136</b>
<b>Autobackup Service .....</b>	<b>136</b>
<b>Restore .....</b>	<b>137</b>
<b>Run Update Script .....</b>	<b>137</b>
<b>Clear Locks .....</b>	<b>138</b>
<b>Check Integrity .....</b>	<b>138</b>
<b>Repair .....</b>	<b>139</b>
<b>View Online Users .....</b>	<b>139</b>
<b>Database Customization.....</b>	<b>139</b>
<b>Custom fields .....</b>	<b>139</b>
Creating Groups of Custom Fields.....	140
Creating Custom Fields.....	141
Accessing Custom Fields.....	143
<b>Managing Users.....</b>	<b>149</b>
<b>Adding/Editing a user .....</b>	<b>149</b>
<b>New/Edit User Window .....</b>	<b>150</b>
<b>Creating/Editing Access Role .....</b>	<b>153</b>
<b>New/Edit Access Role Window .....</b>	<b>154</b>
<b>ODBC access in Projetex.....</b>	<b>156</b>
<b>File Storage and Management</b>	<b>159</b>
Projetex Folder Structure.....	159
File Sharing and Synchronization.....	163
Working with files in Projetex.....	164
Shortcuts.....	167
FTP folders access.....	169
File versions.....	170
Mass File Operations.....	170
<b>Printed Document Templates</b>	<b>171</b>
Templates Basics.....	171
Saving and Printing Documents.....	172
Editing Templates.....	174
Logic and Syntax of Templates.....	175

Advanced commands and functions.....	178
Locale Settings And Date Format.....	183
Templates Storage and Management.....	183
Available Templates Variables.....	184
Common Template Variables .....	184
Client Template Variables .....	185
Project Template Variables .....	187
Contact Template Variables .....	188
Quote Template Variables .....	188
Client Job Template Variables .....	190
Corporate Job Template Variables .....	191
Freelance Job Template Variables .....	193
Invoice Template Variables .....	195
Payment Template Variables .....	199
PO Template Variables .....	200
<b>Custom Queries to Database</b> .....	<b>205</b>
Custom Queries.....	205
Query Building Tutorial.....	206
Example: Single Table Query.....	214
Example: Linking Tables.....	216
Example: Using Functions in Queries.....	219
<b>Custom Reports in Projetex</b> .....	<b>222</b>
Using Custom Reports.....	222
Access to custom reports.....	222
Managing custom reports.....	223
Creating Custom Report.....	224
Creating a Master-Detail Report.....	230
<b>Other Products by AIT</b> .....	<b>235</b>
AcroLexic.....	235
AnyCount.....	236
AnyLexic.....	236
AnyLexic Server.....	237
AnyMem.....	237
CATCount.....	238
ClipCount.....	238
ExactSpent.....	238
Projetex .....	239
Translation Office 3000.....	239
WinLexic.....	240

## Welcome



[Projetex 9](#) is Project Management Software for Translation Agencies.

It tremendously simplifies the task of corporate and freelance workflow management, data and files sharing within company and provides multiple benefits for each team member.

You can either browse the help topics to learn about [Projetex](#) in consecutive way or invoke context-sensitive topics of Help System from any location of [Projetex](#) by pressing F1 key.

If you have any questions, one of our [Projetex](#) support team members would be pleased to assist you.

Contact us at [support@projetex.com](mailto:support@projetex.com)

## Disclaimer


Although every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document or from the use of programs and source code that may accompany it. In no event shall the publisher and the author be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

[Projetex](#), [AnyCount](#) and [CATCount](#) are registered trademarks of Advanced International Translations, Ltd.



## System Requirements

Hardware and Software	Requirements/Supported
<b>Operating System</b>	Windows 98 Windows ME Windows 2000 Windows XP Windows Server 2003 Windows Vista Windows 7
<b>CPU</b>	300Mhz or higher
<b>Memory</b>	256MB or more
<b>Hard Disk Space for Setup</b>	60MB
<b>Hard Disk Space for Operation</b>	400MB
<b>Other</b>	LAN, VPN, or Internet connection to connect to your <a href="#">Projotex Server</a> remotely

 **Note:** It is important to have enough space for database (at least 100–200 MB at any given moment) so that it grows naturally without any problems and errors due to insufficient hard drive space.


## Projotex Setup

1. **Download Projotex setup file** using the following link:

<http://download.projotex.com/Projotex9Setup.exe>

2. **Run the downloaded setup file** and proceed with the [Setup Wizard](#) steps.

During the installation procedure [Projotex](#) Setup will prompt you to select components to install.

 **Note:** To quickly select only [Projotex Server](#) or [Projotex Workstation](#) components, use drop-down list and select **Server Installation** option or **Workstation Installation** option correspondingly.

2.1. **Projotex Workstation** — desktop application used to access and update data on [Projotex Server](#). Select this check box if you need to set up access to [Projotex](#) database from the current PC.

2.2. **Projotex Server** — a set of program components designed to host your centralized database.

Select this check box if you need to host your centralized database on current PC.

Setup can install one of the two available databases, or not install database at all.

- **Demo database.** Select this option if you are installing [Projotex](#) for evaluation. This database contains some sample records, imitating the workflow data of a translation agency.
- **Empty database.** Select this option to install clean database before you begin entering your actual workflow data to [Projotex](#). If you already have a database installed, copy or delete this database, before running [Projotex Server Setup](#).
- **Do not install database.** Select this option in case you are just updating your System Administrator software, and you already have your database up and running and there is no need to install another one.

 **Note:** As a security measure, [Projotex Server Setup](#) under no circumstances will overwrite existing database. If you would like to install new database, please remove or delete existing database file manually before running [Projotex Setup](#).

[Projotex](#) database file is located on Server PC in [Projotex](#) setup folder: \Program Files\AIT\Projotex 9\Projotex Server\Database\

- **Projotex Server Administrator**

[Projotex Server Administrator](#) is a 'control center' of [Projotex Server](#). It can be used to control and monitor [Firebird Database Server](#). If you close [Projotex Server](#) window, [Projotex Server](#) will continue operating. It is recommended to leave this check box selected.

- **Firebird Database Server**

[Projotex Server](#) requires [Firebird Database Server](#) in order to operate. In case you already have [Firebird](#) installed, Setup will reinstall it to make sure that your [Firebird](#) is compatible with [Projotex](#). It is recommended to leave this check box selected.

Make sure that you have no other AIT Firebird-based products installed on your PC: [Projotex 2006 Server](#), [Projotex 7.0 Server](#), [Translation Office 3000](#) and [AnyLexic 2.0 Server](#), before installing [Projotex 9](#).

- **Prepare Firebird Server for work with Projotex**

During this procedure [Projotex](#) will configure [Firebird Server](#) installed to work securely with [Projotex](#) database. It is recommended to leave this check box selected.

- **Projotex Import Utility**

[Projotex Import Utility](#) is an application which allows to perform importing of clients and freelancers information to [Projotex](#) database.

- **Projotex 9 Database Converter.**

[9 Database Converter](#) is an application which allows to upgrade database from [TO3000 V8](#), [TO3000 V9](#), [Projotex 2006](#), [Projotex 7.0](#) and [Projotex 8](#) to operate with [Projotex 9](#).

3. **Register your Projotex Server and Workstation** (registration can be done at any time later).

Your [Projetex](#) License will not limit the number of installed workstations. Only the number of [Projetex Workstations](#), which can connect to [Projetex Server](#) simultaneously, is limited by the number of users (workstations) in your license.

 **Note:** Before registering your [Projetex Workstations](#) you need to register your [Projetex Server](#).

## Registration/Upgrade

### Trial period

You are welcome to use [Projetex](#) free of charge during evaluation period of **30 days**.


During the evaluation period [Projetex](#) is fully functional, with the following limitations:


- Number of **clients** can be no more than **40**;
- Number of **projects** can be no more than **50**;
- Number of **freelancers** can be no more than **20**;
- Number of **corporate experts** can be no more than **30**.


### Purchase information

After purchasing of [Projetex Server](#) and [Workstation](#) applications, you will receive an e-mail message containing your serial numbers for [Projetex Server](#) and [Projetex Workstations](#).

Before registering your [Projetex Workstations](#) you need to register your [Projetex Server](#).

 **Note:** If you are a user of earlier [Projetex](#) versions, be sure to order special [Upgrade Projetex 9 License](#). The cost of such license is much lower than the cost of [Base Projetex 9 License](#)

 **Note:** Registration implies entering the serial numbers to the activation windows of [Projetex](#) applications (thus switching off the evaluation mode and removing evaluation period limitations).

 **Note:** As your business grows you may need to register more [Projetex Workstations](#). To do so, order the license upgrade and register again your [Projetex Server Administrator](#) and the necessary number of [Workstations](#).

You can order the License Upgrade from the following web page:

<http://www.projetestex.com/order>

[Projetex Licenses](#) differ by type and by the number of Workstations foreseen in it.

**Maximum number of Workstations** determines how many [Workstations](#) can connect to [Projetex Server](#) at any given moment. Number of Workstations in your [Projetex license](#) does not limit the number of [Workstations](#) installed.

[Projetex Licenses](#) can be of one of the following types:

License type	Description
<b>Upgrade to Projetest License</b>	<p>Upgrade from earlier version of Projetest to Projetest 9 License must be purchased by any users of earlier versions, who wish to transfer to Projetest 9.</p> <p>The price of Upgrade from Projetest to Projetest 9 License is much lower than the price of Base Projetest 9 License.</p> <p>Be sure to order this license for the same <i>total number of Workstations</i> as in your earlier Projetest license.</p>
<b>Base Projetest License</b>	<p>Projetest 9 Base License determines the number of workstations which can concurrently connect to Projetest Server.</p>
<b>License Upgrade</b>	<p>When project management needs within your organization grow, you can purchase License Upgrade for enabling access of greater number of additional workstations within your company to Projetest database.</p>

After your order is processed you will receive upgraded [Projetest Server](#) serial number and upgraded [Projetest Workstation](#) serial number.

## Registering/Upgrading Projetest Server Administrator

To register/upgrade the [Server Administrator](#), you will need to switch the database to the offline mode first.

1. Switch to [Database](#) tab of the [Administrator](#) and click [Go Offline](#) button.
2. Register [Projetest Server Administrator](#) by clicking [Register/Upgrade](#) button on [Database Server](#) tab of [Projetest Server Administrator](#) or by clicking menu [Help > Register](#).
3. Paste your [Projetest Server serial number](#), which you will receive by email, into [Activation](#) window of [Projetest Server Administrator](#) and click [Unlock](#).

## Registering/Upgrading Workstation software

1. Run [Projetest Workstation](#).
2. Click menu [Help > Register](#) (or [Upgrade](#)) command from [Help](#) menu of each installed [Projetest Workstation](#).
3. Paste your [Projetest Workstation serial number](#), which you will receive by email, into [Activation](#) window of [Projetest Workstation](#) and click [Unlock](#).

 **Note:** Each [Projetex Workstation](#) uses the same serial number.

## Upgrade to Projetex 9

To upgrade from [Translation Office 3000](#) or from a previous version of [Projetex](#) to [Projetex 9](#), delete [AnyLexic 2.0 Server](#) and all the previous versions of [Projetex](#), install new [Projetex 9](#), and convert your database from a previous version of [TO3000](#) or [Projetex](#).

### Uninstalling previous version of Projetex

Copy the existing [Projetex](#) or [TO3000](#) database to some folder on your computer. The default locations of databases are listed below:

#### [Projetex 8:](#)

- ...\\Program Files\\AIT\\Projetex 8\\Projetex Server\\Database\\Projetex.fdb

#### [Projetex 7.0:](#)

- ...\\Program Files\\AIT\\Projetex 7.0\\Projetex Server\\Database\\Projetex.fdb

#### [Projetex 2006:](#)

- ...\\Projetex 2006 Server\\Database\\Projetex.fdb

#### [Translation Office 3000 V9:](#)

- ...\\Program Files\\AIT\\Translation Office 3000 Version 9.0\\db\\TO3000.fdb

#### [Translation Office 3000 V8:](#)

- ...\\Program Files\\Translation Office 3000 V8\\db\\TO3000.fdb

Uninstall [AnyLexic 2.0 Server](#) or [Projetex](#). For this run the uninst000.exe file, which is located in the root of the program's folder. Opt to uninstall Firebird Server when you will receive the corresponding message during the uninstallation process.

In case if Firebird Server will not be uninstalled along with [AnyLexic 2.0 Server](#) or [Projetex](#), uninstall it manually. For this go to Start > Control Panel > Programs > Uninstall a program, in the appeared window find [Firebird](#), right-click on the program name, select **Uninstall** command and proceed through the uninstallation process.

### Installing and registering Projetex


Install [Projetex 9 Server](#) first selecting **Do not to install database** option during the process:

- Run [Projetex 9](#) setup file [Projetex9ServerSetup.exe](#)
- Proceed with [Projetex Server Setup Wizard](#) steps.
- Select **Do not install database** option during the installation process.

## Running Projetex 9 Database Converter

**Projetex 9 Database Converter** is an application supplied in the standard **Projetex 9** setup. It allows to transfer a database from **Translation Office 3000** (Versions 8 and 9) and **Projetex** (Versions 2006, 7.0 and 8). Running **Projetex 9 Database Converter** is a convenient way to upgrade database from **TO3000** or from a previous version of **Projetex** to operate with **Projetex 9**.

1. Run the converter from either startup menu or by double-clicking **ProjetexDBConverter.exe** file (the default location is \Program Files\AIT\Projetex 9\Projetex Server\DBConverter\).
2. **Projetex 9 Database Converter** will automatically locate installation of **Projetex 8** and select the source database to be transferred. In a case if the program cannot find a **Projetex 8** database, or if you would like to transfer a database from **TO3000** or from another version of **Projetex**, click **Browse** button, manually specify a path to the source database file (which has been previously copied) and click **Next** button.
3. Specify a directory into which the database file should be outputted and click **Next** button.
4. Click **Start** button to convert the database for **Projetex 9**.
5. Copy the created file into \Program Files\AIT\Projetex 9\Projetex Server\Database\ folder.

 **Important Note:** Make sure that you convert a database under the same *Language for non-Unicode programs* as on your work computer. For example, if you have worked with French characters in a previous version of **Projetex** or **TO3000**, it is required to have French as *Language for non-Unicode programs* in *Region and Language* options of the computer, in which you perform converting of the **Projetex** database.

Information regarding changing of this option is available at:

- Windows XP: [http://www.microsoft.com/resources/documentation/windows/xp/all/proddocs/en-us/int\\_pr\\_select\\_language\\_version.msp?mfr=true](http://www.microsoft.com/resources/documentation/windows/xp/all/proddocs/en-us/int_pr_select_language_version.msp?mfr=true)
- Windows Vista: <http://windows.microsoft.com/en-US/windows-vista/Change-the-system-locale>
- Windows 7: <http://windows.microsoft.com/en-US/windows7/Change-the-system-locale>

## Getting Started

### User Login to Projetex Workstation

To begin working with **Projetex**, run **Projetex Workstation**, enter login and password and click OK.

**Important:**

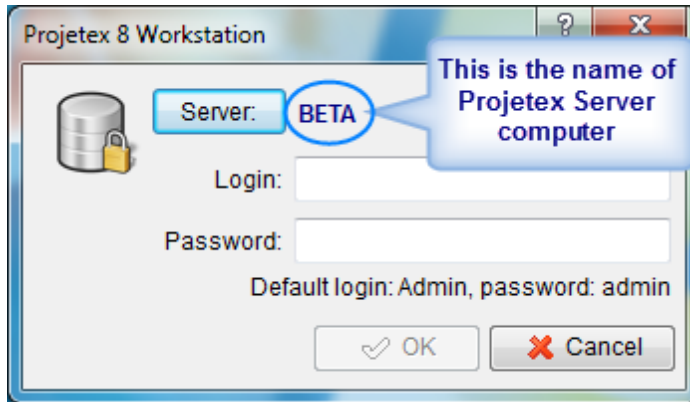
Default login: *Admin*

Default password: *admin*

 **Note:** "admin" is a default administrator's account, with maximum access rights and privileges.

Administrator users are advised to change password of this account, and delete any demo user accounts before entering any sensitive information to **Projetest**. User settings can be changed on **Projetest Server** computer with the help of **Projetest Server Administrator**.

To edit or change **Projetest Server** connection settings, click **Server** button in the **Login** window. Currently selected **Projetest Server** is shown to the right from **Server** button.



## LAN Connection to Projetest Server

In order to connect to **Projetest Workstation** through Local Area Network (LAN) connection, the following conditions must be met:

- Both **Projetest Server** and **Projetest Workstation** must be installed on computers within one same LAN.
- Firewall on **Projetest Server** computer must allow incoming connections of **Projetest Workstation**. 211 and 47110 TCP ports must be added to list of exclusions of your firewall on **Projetest Server** computer.

To connect to **Projetest Server** through LAN:

1. Before installing **Projetest Workstation**, install **Projetest Server** on a computer in your Local Area Network. **Projetest Server** can be installed on any computer in the network, no additional configuration is needed.
2. Run **Projetest Server Administrator**, click **Database Server** tab and make sure that the database server is **ON**. Switch to **Database** tab and make sure that **Projetest** database status is **Online for Workstations**. Close **Projetest Server Administrator** (there is no need to keep it open, server will be running even after you close **Projetest Server Administrator** window).
3. Install **Projetest Workstation** on a computer in the same Local Area Network.
4. Run **Projetest Workstation** and in the **Login** window click **Server** button.
5. In the **Network Location of Projetest Server** window click **LAN PC** button.
6. Enter network name of computer, on which **Projetest Server** had been installed, then click **Test Connection** button.

7. If connection is successful, click **OK** button, and attempt to log in to [Projetest](#) (default login is *admin* and default password is *admin*).

## Internet Connection to Projetest Server

In order to connect to [Projetest Server](#) through plain Internet connection, the following conditions must be met:

- Computer, on which [Projetest Server](#) is installed must have a *static external IP* address.
- Both [Projetest Server](#) and [Projetest Workstation](#) computers must have stable Internet connection.
- Firewall on [Projetest Server](#) computer must allow incoming connections of [Projetest Workstation](#). 211 and 47110 TCP ports must be added to list of exclusions of your firewall on [Projetest Server](#) computer

To connect to [Projetest Server](#) through the Internet:

1. Install [Projetest Server](#) on a computer with a static external IP address and stable Internet connection. [Projetest Server](#) can be installed on any computer, no additional configuration is needed.
2. Run [Projetest Server Administrator](#), click **Database Server** tab and make sure that the database server status is **ON**. Click **Database** tab and make sure that [Projetest](#) database status is **Online for Workstations**. Close [Projetest Server Administrator](#), (there is no need to keep it open, server will be running even after you close **Projetest Server Administrator** window).
3. Install [Projetest Workstation](#) on a computer with stable Internet connection.
4. Run [Projetest Workstation](#).
5. Click **Server** button in **Login** window.
6. Click **Internet** button.
7. Enter static external IP address of the remote [Projetest Server](#) computer, then click **Test Connection** button.
8. If connection is successful, click **OK** button, and attempt to log in to [Projetest](#) (default login is *admin* and default password is *admin*).

## Basic working procedures

### Project manager basic working procedures

Most of the options required for project manager users are included in **Projects** section of [Projetest](#). Since primary purpose of [Projetest](#) 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 [Projetest](#) 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.

- [Creating a project](#)
- Project profile
- Files of project

*Step 2* – Splitting the Project into a number of *billable client jobs*, each of which can have a certain volume and price.

- [Creating client jobs](#)
- 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*.

- [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.

- Creating job assignments
- Files of corporate expert

*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.

- [New/Edit PO Window](#)

*Step 6* – Tracking project and job progress with the help of *Schedules* and *reports*.

- [Using schedules](#)

*Step 7* – Closing *completed jobs* and *projects*, issuing and approving *printable invoices* to client,

based on agreed payment terms.

- Invoices to client
- Balance of project

## Accountant basic working procedures

Accounting information in Projetex can generally be found in the following areas: **Clients** and **Freelancers**.




### Clients section




**Client** window can be used to enter and edit client profiles. These include *billing contact information* (like VAT code), *postal address*, *payment terms*, and *invoicing policy*.

The following *tabs* may also pose interest to accounting staff:

- **Contacts list**
- **Prices to client**
- **Client Jobs**
- **Invoices to client** (this is where invoices to client can be created)
- **Payments from client** (this is where payments from client can be registered)
- **Client balance**

Additional windows in **Clients** section also provide accounting information:

 <p><b>Quotes to Clients</b></p>	<p><b>Quotes to Clients</b> window is basically identical to the <b>Quotes</b> tab of the <b>Client</b> window; though unlike the latter, <b>Quotes to Clients</b> window contains quotes for all clients.</p>
 <p><b>Clients Jobs</b></p>	<p><b>Client Jobs</b> window contains information on client jobs of all clients. The outlay of this window is similar to <b>Clients Jobs</b> tab of the <b>Client</b> window.</p>
 <p><b>Invoices to Clients</b></p>	<p><b>Invoices to Clients</b> window is identical to the <b>Invoices</b> tab of the <b>Client</b> window; though unlike the latter, <b>Invoices to Clients</b> window contains invoices for all clients. This window also contains <b>Mass Invoicing</b> button.</p>

 <b>Payments from Clients</b>	<b>Payments from Clients</b> window contains information on payments from all clients. The outlay of this window is similar to <b>Payments</b> tab of the <b>Client</b> window. This window also contains <b>Mass Payments</b> button.
 <b>Balances of Clients</b>	<b>Balances of Clients</b> window provides basic balance sheet of your clients accounts: total payments, total invoices and general balances of all clients, and is almost similar to <b>Accounts</b> tab of the <b>Client</b> window.
 <b>Schedule of Projects</b>	<b>Schedule of Projects</b> window displays in a graphical all projects for the selected period, with color distinction for current/due today/overdue <b>Projects</b> and so on.


## Freelancers section







**Freelancers** window can be used to enter and edit freelancer profiles. These include *billing contact information* (like VAT code), *postal address* and *payment terms*.

The following tabs may also pose interest to accounting staff:

- **Prices of freelancer**
- **Quotes from freelancer**
- **Freelance Jobs**
- **Purchase orders to freelancer**
- **Payments to freelancer**

Additional windows in **Clients** section also provide accounting information:

 <b>General Prices for Freelancers</b>	With the help of <b>General Prices for Freelancers</b> window you can manage list of general prices for different freelance jobs.
--	---

 <p><b>Quotes from Freelancers</b></p>	<p>In the <b>Quotes from Freelancers</b> window all <b>Quotes</b> from the database can be viewed and edited.</p>
 <p><b>Freelance Jobs</b></p>	<p>In the <b>Freelance Jobs</b> window all freelance jobs of all freelancers can be viewed and edited.</p>
 <p><b>PO to Freelancers</b></p>	<p>In the <b>POs to Freelancers</b> window all purchase orders of all freelancers can be viewed and edited.</p>
 <p><b>Payments to Freelancers</b></p>	<p>In the <b>Payments to Freelancers</b> window all payments to all freelancers can be viewed and edited.</p>
 <p><b>Balance of Freelancers</b></p>	<p><b>Balance of Freelancers</b> window can be used to review the total <i>Payments</i>, <i>POs</i> and account balance of all freelancers.</p>
 <p><b>Schedule of Freelance Jobs</b></p>	<p>In the <b>Schedule of Freelance Jobs</b> window all freelance jobs for the selected period are displayed in a graphical view with color distinction for current/due/overdue jobs, allowing to get the situation at one glance.</p>

## Corporate expert basic working procedures

*Corporate expert* user accounts can access only certain areas of **Projtex**. These are:

**Corporate Jobs** tab — displaying all jobs of the expert. This can be used to obtain information on any for the jobs currently assigned. See [Corporate Jobs tab \(for Expert\)](#) for details.

**JAs** tab — contains the list of all job assignments, issued for this expert. Check this tab to see which of the assigned jobs to begin work with. See [JAs tab \(for Expert\)](#) for details.

**Files** tab — providing secure access to this experts personal folder in *Business* folder. This folder can contain job files, saved JAs, and any additional data. See [Files tab \(for Expert\)](#) for details.

**Schedule** tab — shows schedules of all corporate jobs of the corporate expert. See Schedule of corporate expert for details.

## Corporate Jobs tab (for Expert)

**Corporate Jobs** tab displays all corporate jobs assigned to currently logged-in corporate expert. Double-click any of the jobs in the list to edit it.

When you finish your job, double-click it in the list, change status to **Completed**, insert the completion date and indicate the time spent on this job. To open it select the necessary job and double-click it or click **Edit** button. See [Editing Corporate Jobs \(for Expert\)](#) for details.

### Job status colors


Color of jobs in the list is determined by their completion status.

- Black — the job is *completed*
- Green — the job is *not completed* yet, deadline in the future
- Blue — the job is *due today*
- Red — the job is *overdue*

 **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 either in red or in green:

Job Name	
Engine shceme ER-34221	This Job has On Hold status
Veni Vidi Vici	This Job has Planned status
Nam tempus	

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

As any table you can find in **Projetex**, **Corporate Jobs** list can be sorted by each column value by clicking the corresponding column caption.

Right-click the list, and select **Customize Columns** to add other columns to view. See [Right click menu](#).

### Filtering corporate jobs list

Using **Status** drop-down list you can filter the jobs by their status, such as *completed*, *due today*, *overdue*, and so on.

You can also use **JA Issued** drop-down list to filter the jobs which are included or not included into job assignments (*JAs*).

See also:

[Editing Corporate Jobs \(for Expert\)](#)

[JAs tab \(for Expert\)](#)

## Editing Corporate Jobs (for Expert)

**Code** — unique code of corporate job is created automatically along with the job itself.

**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. Cannot be edited by expert.

**Group** — group of services. All services in [Projetest](#) are broken down by groups. Cannot be edited by expert.

**Service** — each group of services contains a separate list of services. Cannot be changed by corporate expert.

**Volume** — job volume can be indicated in a number of units (characters, words, lines, hours and so on). Cannot be edited by expert.

**Time spent** — enter time spent on this job to have its cost automatically calculated according to your AHC.

**Timeline** — timeline of a corporate job in [Projetest](#) includes assigned, deadline dates and the date when the corporate job has been actually completed. Corporate expert can only edit the date of completion. Experts can only edit **Completed** date. Experts cannot edit **Assigned** and **Deadline** dates.

**Optional Status** — these are used when corporate job needs to be put *on hold*, or when you create *planned* (or potential) jobs. Jobs with *on hold* status have their deadlines undetermined, thus *on hold* jobs cannot become overdue. Jobs with *planned* status cannot be set as completed, since *planned* status assumes that work has not yet started.

**Instructions** — any instructions or comments of project manager regarding a corporate job can be viewed here.

**Work Notes** — corporate expert notes can be viewed here.

**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 [Projetest Server Administrator](#) can add or remove custom fields. See [Custom Fields](#) topic for details.

You can save corporate 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 corporate jobs.

Templates for printing corporate 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 corporate jobs are saved in *D:\BusinessServer\Templates\EXPERTS\CORPORATE\Jobs* folder.

See also:

[Corporate Jobs tab \(for Expert\)](#)

[JAs tab \(for Expert\)](#)

[Files tab \(for Expert\)](#)

## JAs page (for Expert)

**JAs** tab of **Project** window contains the list of job assignments (*JA*). Double-click a job assignment to view it.

Use **Approved** drop-down list to view only those job assignments which have or have not been approved by project managers.

Use **Status** drop-down list to filter out only those *JAs* which have certain status (*overdue*, *due today*, *due tomorrow* and so on).

Information on this tab can be edited only by projects managers.

See also:

[Corporate Jobs tab \(for Expert\)](#)

[Editing corporate jobs \(for Expert\)](#)

[Files tab \(for Expert\)](#)

## Files page (for Expert)

You can explore your **Projetex** folder with the help of **Files** tab of **Projetex Workstation** window.

On **Files** tab you can browse your **Job** folders. You can also open the files in **Windows Explorer** by clicking **Explore** button.

**Files** tab contains two horizontal panes. Upper pane shows the folder tree for selected expert folder and content of the currently selected subfolder. Pane underneath allows to use shortcuts.

Clicking any of the **Shortcuts** options will create a second file view field to the right, and open appropriate folder there. This allows to simultaneously work with two opened folders in the same window.

**Expert FTP** — access to *FTP browser* and connect to your expert FTP folders.

**Shortcuts** — browse folders on your PC

**JA folders** — quickly open any of your folders with job assignments.

See also:

[Corporate Jobs tab \(for Expert\)](#)

[Edit Corporate Job window \(for Expert\)](#)

[JAs tab \(for Expert\)](#)

## Common Functions

### Sorting records

Majority of data in *Projetex* is being stored in various tables. Each of these tables can be customized to a certain extent to adopt to each user's preferences.

Just like in most of tables in other software applications you can sort table rows order by any column. To sort the rows in any table, click the *column caption* in the list.

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

Global Code ▾	Sent	Invoice Total
ACME-10065/2009	10/2/2009	9095.00
ACME-10064/2009	9/23/2009	1170.18
ACME-10063/2008	4/14/2008	500.00

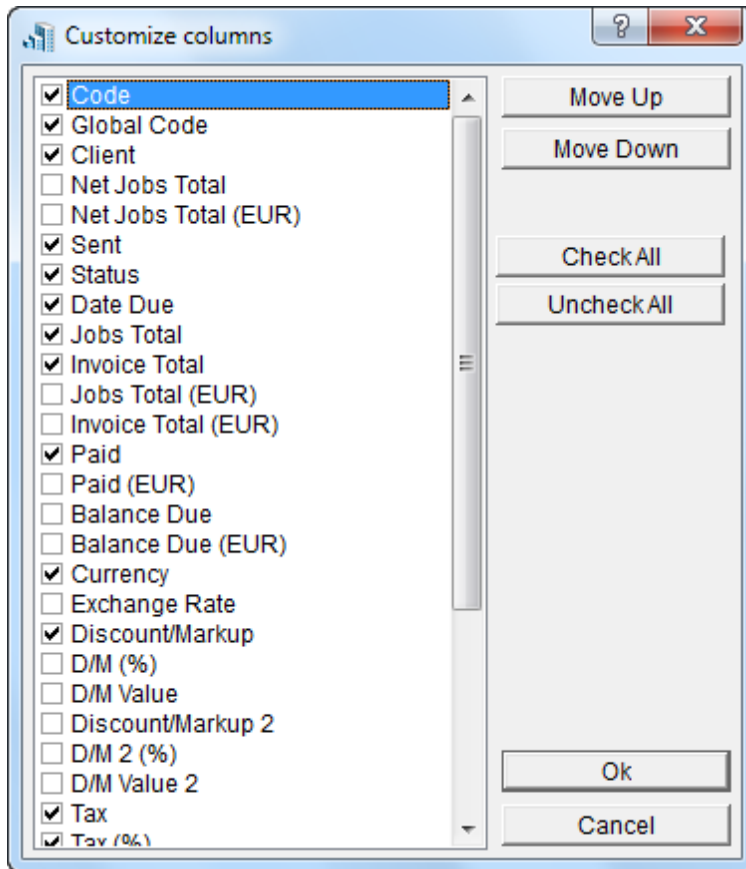
### Columns Customization

You can easily choose columns displayed in a table. To choose displayed columns:

1. Right-click the table, and on the context menu click **Customize Columns** command.
2. Choose columns which should be displayed by selecting the appropriate check boxes.
3. Click *Ok* button.



 **Note:** You can use *Check All* and *Uncheck All* buttons to check/uncheck all columns which should be displayed.




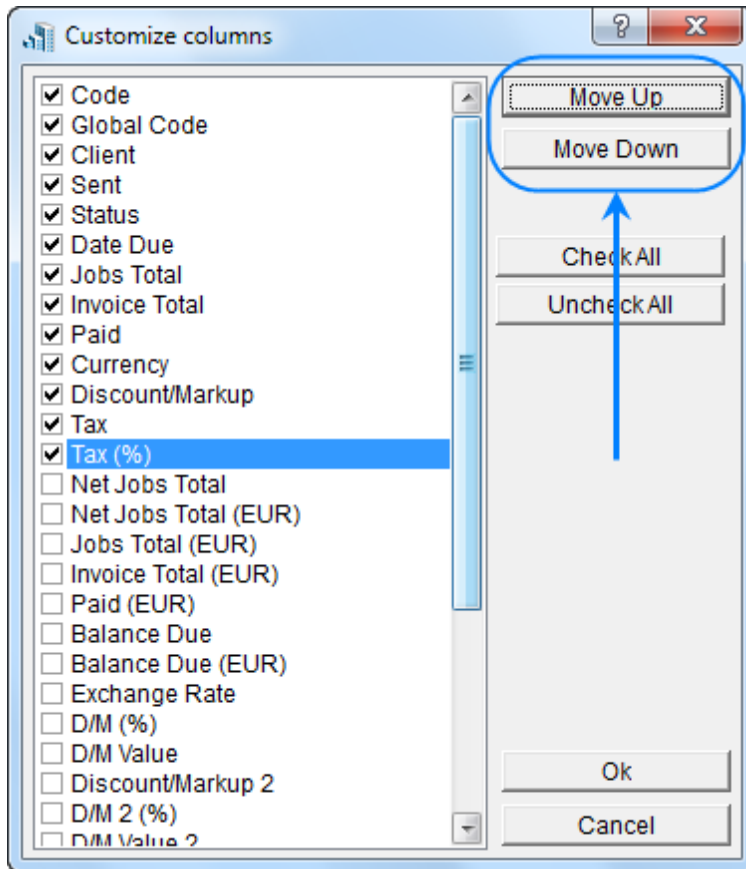
## Moving columns

You can easily change the order of the columns displayed. To change column order:

1. Click the *column caption* and hold the mouse button. Black line will appear to the left of this column.
2. Drag your cursor without releasing the mouse button, to the desired column.
3. Release mouse button. The column will be moved to the desired place.

Client	Sent	Global Code	Invoice Total
Global Concepts Universal	27.09.2010	ACME-10033/2010	54,00
Translation Designs	27.09.2010	ACME-10033/2010	1950,00
Unlimited Concepts Unified	21.09.2010	ACME-10028/2010	400,00
Translation Designs	10.09.2010	ACME-10032/2010	1000,00

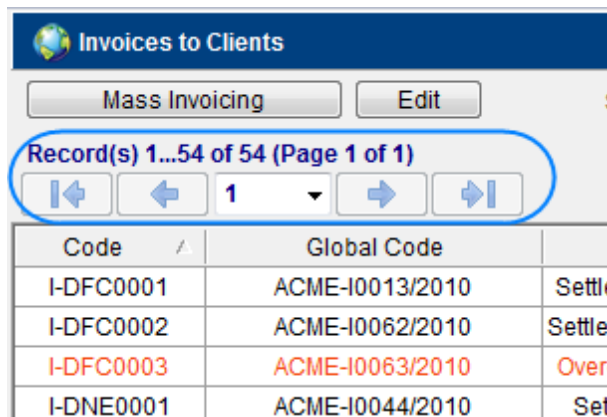
 **Note:** Optionally you can use **Move Up** and **Move Down** buttons of the **Customize Columns** window described above to change the order of the columns.



To open **Customize Columns** window, right-click the table, and on the context menu click **Customize Columns** command.

## Tables with Pages

Some tables in **Projex** can contain a lot of records. For example, **Projects** or **Invoices** tables can contain thousands and tens thousands of records. **Projex** breaks such tables by pages.



Page navigation buttons are as follows:



- switch to previous page.



- switch to next page.



- jump to the first page.



- jump to the last page.

Page navigation buttons are active only if page mode is on. To turn this mode on, open **Fonts and Sizes** page of **Current User** settings and select any item from **Number of rows in page mode** drop-down list except **Page Mode OFF**. For schedules to be split into pages, select any item from the list except **Page Mode OFF** in **Number of rows in page mode for schedules** drop-down list

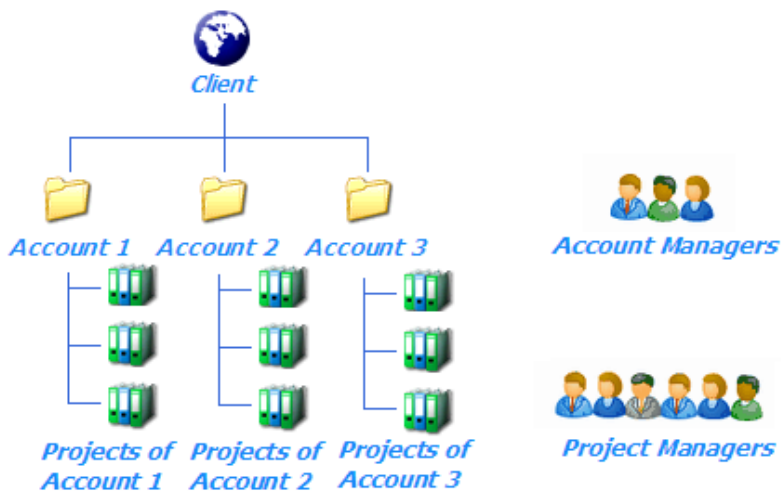
## General Features

### Account Management

#### Client Accounts

**Projetex** features account-based project management system. Account manager (or AM) can be assigned not to a client, but to a client's account. This implies the following:

- multiple accounts can be created for a client
- multiple account managers can be assigned to an account
- each project can only belong to one account
- In terms of organization and project hierarchy accounts group an number of projects, while accounts themselves are being grouped by clients:



Each new client has single default account (*Main*). So, unless any new accounts are created, an account manager is assigned to a client, in other words one client equals one account. Thus in this case the term account implies certain client and all projects of this client. The only difference is that in **Projotex** multiple account managers can be assigned to a client account.

However, in case the project flow of a client is strong, it might be reasonable to split the projects of this client into a number of accounts, each of which can be assigned to a different account manager (or a number of account managers). This should help to optimize workload balance between account managers.

## Creating an account


Additional client accounts can be created for any of the existing clients by any user with production manager access rights. To create a new client account for one of the clients:

1. Open **Main** tab of **Client** window.
2. Select the client, whose account you wish to create.
3. Click **Accounts** tab.
4. Click **New** button on **Accounts** tab.
5. Enter properties of the new account in **New Client Account** window.
  - Enter the name of the new account in **Account Name** field.
  - **(optional)** Select **Default Account** check box if you wish to make new account default one for this client. This step can be done at any time later.
  - **(optional)** Select client's **Project Manager** for this account. Client PM will be automatically set as PM of each project being created within this account. This step can be done at any time later.
  - **(optional)** Assign account managers to the new account. This step can be done at any time later.
  - Click **Apply** button to apply changes.
  - Click **OK** button to apply changes and close window.

## Account Managers

At any time any number of account managers can be assigned to any client account. The following should be taken into consideration when assigning account managers:

- Users with Normal (account manager) access rights will be able to view only projects of client accounts assigned to them.
- Users with Normal (account manager) access rights cannot view those clients, which has not been assigned to at least one client account of a particular client.
- Users with Normal (account manager) access rights will also be able to view any projects, to which they have been assigned as project managers.
- Users with Normal (account manager) access rights would be able to create projects only within accounts which they have been assigned.

 **Note:** Access rights for each user can be set in **Users and Access** section of **Projetex Server Administrator Corporate Settings** tab. Existing accounts with currently assigned account managers are displayed on **Client Profile** tab.

## Assigning and removing account managers

To assign or remove an account manager, you need to have production manager access rights. There are two ways of assigning account manager: when editing or [creating a Client Account](#), and in the **Client Profile** tab itself, by clicking **Account Managers** button.

1. Open **Main** tab of **Client** window.
2. Select the client, to which you wish to assign account managers.
3. Click **Account Managers** button which will open **Assign Account Managers** window.
4. Select required account using **Select Account** drop-down list in **Assign Account Managers** window.
5. To assign an account manager to a client account, select this manager in **Available Staff** field, and click **<<Assign** button.
6. To remove an account manager from client account, select this manager in **Assigned Staff** field, and click **Remove>>** button.

## Default Account

By default, each client has one account named "*Main*" with *Default* status. Default account has the following important properties:

- Default account cannot be deleted;
- If any other account is being deleted, all projects contained within this account are automatically assigned to default account;
- Any new project, unless it is being created by an account manager is automatically assigned to a default account;
- There always must be a default account for each of the clients;
- There cannot be more than one default account.

Default account can be marked as such:

- On the **Client Accounts** tab of **Client** window **Main** tab.
- On the **Select Client Account** dialog window, which can be opened using **Client Account** button in **Edit Project** window.
- On the same dialog, but opened when clicking **Client Account** button in **Project** window **Main** tab.

- In the **Assign Account Managers** window, which can be opened by clicking **Account Managers** button on the **Client Profile** tab of **Client** window **Main** tab. (this option is available only for users with *production manager* access rights)

## Currencies Management

In **Projetex** you can assign individual **client currency** to each **client**, **expert currency** to each **freelancer**, and still, be able to see 'the whole picture' using your **base currency**. This chapter will help you to understand how currencies are handled in **Projetex**.

First of all, let us give definitions for the terms used in this chapter:

- **Base currency** is the currency in which your company makes all internal accounting records, i.e. project balance, taxes, salary of your corporate experts, corporate expenses and so on. In most cases, it is the currency of your country.
- **Client currency** is the currency in which you produce invoices for your client and receive payments from your client.
- **Expert currency** is the currency in which you produce purchase orders and make payments to your freelance experts and vendors.

### Example:

If your company is in Europe, your client is from USA and your freelance expert is from Japan, thus your **base currency** will be Euro, the **client currency** will be US Dollar, and **expert currency** will be Japanese Yen.

In **Projetex** you can easily produce invoices, link them with payments from clients and record them in client currencies. **Projetex** will automatically make parallel records in the base currency of your company.

You may issue POs and make payments to freelance experts in **any currency**, and **Projetex** will automatically record your POs and payments in **experts' currencies**.

These parallel records in your base currency allow conducting all your internal company accounting in your base currency, still keeping the records in other currencies.

To make these parallel records possible, you only have to [enter currency rates](#) for the currencies of your clients and freelancers. You may also easily [change the currency rates for each recorded client job](#) or for all future jobs.

## Base Currency

**Base currency** represents your local currency, in which your company conducts accounting.

Base currency can be changed on **Corporate Settings** tab of **Projetex Server Administrator**. To do so:

Run **Projetex Server Administrator**.

- Click **Database** tab.

- Put your database offline by clicking **Go offline** button.
- Once database is offline, switch to **Corporate Settings** tab and click **General Settings**.
- Click **Base Currency** button and select the necessary currency in **Edit Base Currency** window:
- Make sure that the base currency is set correctly before starting your work in **Projetex**.

## Adding Currencies and Exchange Rates

### Adding new currencies

Since the currencies of your clients and freelancers may be different from yours, you will need to add new currencies to your **Projetex** database and to *define their exchange rates* relating to your base currency.

To define currency settings:

1. Open **Projetex Workstation** and select **Corporate** command of **Settings** menu.
2. In **Corporate Settings** window, click **Currencies**.
3. If some of the currencies that you need are not included into the list, you may add them by clicking **New** button. You can also edit or delete an existing currencies.

### Setting exchange rates

You can *enter exchange rates* between your base currency and any of the other currencies. Exchange rates of currencies are used for keeping parallel records in both base currency and client/freelancer currencies relating to your base currency.

To enter an exchange rate, click **Exchange Rates** section in **Corporate Settings** window.


To add new currency exchange rate, click **New** button.

Select the currency from the drop-down list, enter its rate relating to your *base currency* and click **OK**.

## Client/Freelancer Currencies

When you add new *client* or *freelance expert* to your database, you define the *currency* of this *client* or *freelance expert*.


All the prices, quotes, invoices and payments related to the *client/freelancer* will be recorded in the currency you defined. That is why it is important to define the *client/freelancer currency* before entering any financial records.

 **Note:** If you encounter a rare case when your transactions with particular *client/freelancer expert* involve more than one currency, you can create two separate *client/freelancer* records (for instance, if client/expert name is Alpha, you can create Alpha-USD record with client/expert currency: USD

and Alpha-EUR record with client/expert currency: EUR). This way this *client/expert* will have two separate accounts in your database, one for each *currency*.

On **Main** tab of **Clients/Freelancers** window, you may change the currency of your *client/freelance expert* by clicking **Client Currency/Expert Currency** button.

It may be useful to modify the *client/expert currency* only before first financial record for this *client/expert* has been recorded (price, quote, job, invoice or payment). However, in rare case when you have been entering the data meaning another currency, you can still change the currency to the right one, after answering **Yes** to program warning.

 **Note:** If you change currency after some financial record for this *client/expert* has been recorded (price, quote, job, invoice or payment), all these financial records will not be recalculated due to appropriate exchange rates.

## Currencies in Prices

In **Projetex** for each client and freelancer you can specify his/her own currency for financial records. It may be differ from your *base currency*.

When you enter the prices for your *client* or *freelancer*, the currency is displayed in the bottom left part of the **New/Edit Price** window:

When you create or edit client/freelancer job, the job cost (*Total*) is displayed in client/freelancer currency. The *client/freelancer currency* is indicated by green font to the right from the total.

If client/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.

 **Note:** If the *job* is already added to the invoice, button with exchange rate will be disabled.

On **Project Balance** window, all the records are displayed in your base currency.

## Wordcount Tools

### AnyCount in Projetex

#### Introduction

**AnyCount** is text count engine, which automatically calculates text volumes contained in a file (or files). Counts can be produced in different volume units (words, characters with spaces, characters without spaces, lines, tabs, custom units). AnyCount works with all most common file formats.

**Projetex** has built-in **AnyCount 7.0 Enterprise** to quicken and simplify job creation and expenses calculation for each job.

**AnyCount 7.0** currently counts the following formats: *BMP, CHM, CSV, DOC, DOCX, GIF, HLP, HTM, HTML, JPG, MIF, ODP, ODS, ODT, PDF, PNG, PPS, PPT, PPTX, PUB, RAR, RTF, SDC, SDD, SDW, SLP, SXC, SXI, SXW, TXT, VSD, WPD, XLS, XLSX, XML, ZIP*.




In [Projetex AnyCount](#) is used to quickly calculate volumes of new jobs and quotes. AnyCount options can be found in the following windows: [New/Edit Draft Client Job](#), [New Client Job \(Edit Client Job\)](#), [New Corporate Job \(Edit Corporate Job\)](#) and [New Freelance Job \(Edit Freelance Job\)](#).

## Counting files

In [Projetex AnyCount](#) is used in the following way:

When creating a job or a quote, click **<=AnyCount** button to run [AnyCount](#). It will automatically count required units in a target files and enter the resulting number into the **Volume** field.

1. Select the volume units from the corresponding drop-down list.

 **Note:** If the units selected were not specified as "Used by AnyCount" you will not be able to perform the count. This option is available on the [AnyCount section](#) of Current User Settings. It was implemented to distinguish volume units, that cannot be used as text volume units (e.g. "hours").

2. Click **<=AnyCount** button.

3. Select the file to be counted in the **Open** window and either double click it or click **Open** button:

4. [AnyCount Engine](#) will count the text in selected file and enter count results into the **Volume** field of the [New Corporate Jobs](#) window.

5. Expanded count report is added on the [AnyCount Notes](#) tab which appears after [AnyCount](#) is used.

6. If you noticed that volume units should be changed to another ones, you can select the volume units from the corresponding drop-down list. [Results of counting](#) and [AnyCount Notes](#) will be changed automatically.

## Creating a client job based on counted file

Click [AnyCount](#) button on the **Tree** tab of [Project](#) window. Select volume to count in and click **OK** button. Select a file to count. Once the count process is completed, [Projetex](#) will create a new client job with the name of the counted file, and respective volumes and volume units.

## CATCount in [Projetex](#)

### Introduction

[CATCount](#) is a tool for calculating Computer Assisted Translation (CAT) cost. In [Projetex CATCount](#) is used for accounting of computer assisted translation jobs. Primary functions of [CATCount](#) are:

- Translating complex [CAT Scheme](#) (different rates and counts of different types of text) into a single text count number, i.e. [CATCount](#).
- Importing CAT counts from [Trados Translator's Workbench](#) and [Logoport](#) logs.
- Printing of [CAT Schemes](#) together with original word counts.

CATCount options can be found in the following Projetex windows: **New/Edit Draft Client Job**, **New Client Job (Edit Client Job)**, **New Corporate Job (Edit Corporate Job)** and **New Freelance Job (Edit Freelance Job)** windows.

## Interface

In Projetex CATCount is used in the following way.

When you open **New Corporate Job** window you specify the job name, group and service at first. CATCount comes at a hand when you want to specify the volume of the job and calculate its cost using the CAT Scheme. The result will be automatically entered to the **Volume** field.

When you create a job or a quote and click **<=CATCount** button, you open CATCount window. With the help of this window you can enter word counts for different match types, and their respective rates. CATCount automatically calculates equivalent CAT count and enters resulting number into the **Volume** field.

## Creating CAT counts

1. Click **<=CATCount** button in the **New/Edit Draft Client Job** or **New Client Job (Edit Client Job)** window to open CATCount window.
2. Enter the number of words with different level of match (100% match, "fuzzy" match and so on), the percentage of full rate payment, i.e. the CAT Scheme.
  - To save a scheme, on the **Scheme** menu click **Save** command.
  - To load a scheme on the **Scheme** menu click **Load**.

 **Note:** To load word count analysis logs of Trados Translator's Workbench on the **Log** menu click **Load** command.

3. Click **OK** to enter the **Total CATCount** number to the **Volume** field.

Expanded count report is added on the **CATCount Notes** tab which appears after CATCount is used.

## Projetex Interface

### Common Interface Options

#### Button Panel

Button Panel is located at the bottom of Projetex Workstation window. It consists of six groups of buttons: **History**, **Jump**, **Open Folders**, **Local Custom Filter**, **Local Report**, **Global Date Filter**.



## History buttons

**Back** button switches **Projetex** to the previously visited tab or window.

**Forward** button brings you to the tab or window which was opened before you clicked **Back** button.

## Jump buttons

After clicking **Client** button you jump to the **Client** window, the tab depends on the window opened and element selected at the moment you clicked.

### Example:

**Quotes to Clients** window is opened, certain client record is selected from the list. If you click **Client** button **Projetex** switches to **Quotes** tab of **Client** window displaying data for the same client.

**Project** and **Expert** buttons work similarly to **Client** button.

**Project** button switches to certain tab of the **Project** window, displaying data for selected project.

**Expert** button switches to certain tab of the **Expert** window, displaying data for selected expert.

## Open Folders buttons

Using **Open Folders** drop-down list you can easily switch between the folders opened during the current **Projetex** working session. Any work folder you open in **Projetex** (using **Explore** buttons) is automatically added to the list. When you need to switch between the opened folders, select the necessary folder in the drop-down list and click **Go** button.

## Local Custom Filter buttons

Use **Local Custom Filter** buttons to construct filter conditions, thus simplifying the search of necessary records in your **Projetex** database. For example, you can build the filter to display only projects of a particular project manager which are due today.

**Edit** button opens **Edit Filter** window.

**On/Off** button applies or disables the currently configured filter.

**Recent** button applies the last created filter (last used filter settings).

## Local Report buttons

**Local Report** buttons give you possibility to save the content of **Projetex** window currently displayed (save it in a separate file of defined format or print).

**Export** button opens **Export** window, where you can choose the required format of output file.

**Print** button opens the preview of the document you are about to print.

### Global Date Filter buttons

**Global Date Filter** buttons are designed to filter records according to user defined date conditions.

**Edit** button opens **Edit Global Date Filter** window.

**On/Off** button correspondingly switches on/switches off the date filter.

**Recent** button switches on the last created data filter.

### Navigation Panel

Navigation panel is a part of **Projetex** user interface simplifying and quickening navigation in the program.

It consists of four groups of icons: **Clients**, **Projects**, **Corporate Team**, and **Freelancers** each containing icons for accessing various related windows.

You can hide navigation panel to free display space by clicking left edge of the screen.

Use **Navigation** menu to switch between **Classic** and **Modern style** of navigation bar.

### Client group of icons



**Client** window displays all information about the taken client. Client data is broken down by the following tabs: **Main**, **Contacts**, **Marketing**, **Prices**, **Quotes**, **Projects**, **Client Jobs**, **Invoices**, **Payments**, **Balance**, **Files**, **Info**, **Schedule**.



**General Prices for Clients** window provides access to general price list: each price representing a rate in chosen currency for certain service (language pairs, translation, proofreading, etc.).



**Quotes to Clients** window provides access to all currently created client quotes. This window can be used to create a new project based on a quote, add/edit/delete draft jobs for existing quotes.



**Client Jobs** window displays the list of all client jobs stored in database. With the help of this window you can have a quick overview of all client job statuses, calculate client job totals, edit

and delete client jobs.



**Invoices to Clients** window provides access to all currently issued invoices. Use this window to calculate invoice totals, view and edit invoices, print any of these invoices, perform Mass Invoicing.



**Payments from Clients** window lists all payments received from all Clients. Use this window to calculate payment totals, link payments with invoices, edit, delete payments and perform Mass Payments.



**Balance of Clients** window displays a simplified balance sheet broken by clients based on payments from clients and invoices to clients. Accounting staff can use this window to identify which of clients' accounts require attention. Can be viewed in Base Currency or Client Currencies.



**Schedule of Projects** window displays block diagram of all projects for the specified period. Schedules are grouped by clients.

## Project group of icons



**Project** window displays all information about each of the projects. Project data is broken down by the following tabs: **Main, Tree, Client Jobs, Corporate Jobs, Freelance Jobs, Freelance Team, JAs, POs, Balance, Files, Info, Schedule.**



**Client Jobs** window displays the list of all client jobs stored in database. With the help of this window you can have a quick overview of all client job statuses, calculate client job totals, edit and delete client jobs.



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



**Freelance Jobs** window displays the list of all jobs created for freelance experts. With the help of this window you can have a quick overview of all freelance job statuses, view if the jobs have been included in purchase orders, calculate freelance job totals, edit and delete freelance jobs.



**Project Balance** window displays Balance broken down by projects as well as Gross Profitability analysis. Can be viewed only in Base Currency.



**Schedule of Client Jobs** window displays block diagram of all client jobs for the specified period.

## Corporate Team group of icons



**Corporate Expert** window displays consolidated information about the specific in-house expert. Corporate expert data is broken down by the following tabs: **Main, Corporate Jobs, JAs, Files, Info, Schedule**.



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



**Job Assignments** window displays the list of all currently issued job assignments to all corporate experts.



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



**Schedule of Corporate Expert Jobs** window displays block diagram of all corporate jobs for the specified period. Schedules are grouped by corporate experts.

## Freelancers group of icons



**Freelance Expert** window displays consolidated information about the certain freelancer. Freelance expert data is broken down by the following tabs: **Main, Application, Prices, Quotes, Freelance Jobs, POs, Payments, Balance, Files, Info, Schedule**.



**General prices for Freelancers** window, where you can manage your general tariffs for freelance expert services: set price in chosen currency for each service.



**Quotes from Freelancers** icon opens window displaying detailed information on all quotes from freelancers stored in database.



**Freelance Jobs** window displays the list of all jobs created for freelance experts. With the help of this window you can have a quick overview of all freelance job statuses, view if the jobs have been included in purchase orders, calculate freelance job totals, edit and delete freelance jobs.



**POs to Freelancers** window displays all currently issued purchase orders for freelance jobs. Use this window to calculate PO totals, view and edit POs, print any of these POs.



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



**Balances of Freelancers** window displays a simplified balance sheet broken by freelancers based on purchase orders and payments to freelancers. Accounting staff can use this window to identify which accounts require attention. Can be viewed in Base Currency or Client Currencies.



**Schedule of Freelance Expert Jobs** window displays block diagram of all freelance expert jobs for the specified period. Schedules are grouped by corporate experts.

## Contextual Menu

Contextual menu can be opened by right-clicking any table in [Projetex Workstation](#). It contains the following commands:

**Customize Columns** — use this command to change order of columns in the table, and to add or remove columns.

**Vertical View** — use this command to get a summary of currently selected table line.

See also:

[Columns Customization](#)

## Local Custom Filter

*Local Custom Filter* can be used to search specific data in large tables. In the white area of **Edit Filter** window current filter conditions are displayed.

**Open** button browses for previously saved filter settings.

**Save** button saves current settings of *Local Custom Filter* in the *Projetex Workstation* setup folder.

**Add** button adds another filtering condition.

**Delete** button deletes currently selected filter condition.

**Clear** button deletes all current filter conditions.

## Local Report Export

Any table in *Projetex Workstation* can be exported to a number of formats, by clicking **Export** button of the **Local Report** bar.

**Export to** drop-down list can be used to select format of the output file.

**Open after export** checkbox opens exported file.

## Global Date Filter

Global date filter can be set to display only those records in the database that match certain time parameters. For example, you can set global date filter to display only records for certain year, quarter, month or to specify a custom time interval.

Global date filter effect is not limited to certain window. Once applied, it works in all date-relevant records.

The following windows and tabs are affected by global date filter:

- **Clients** section of Navigation Panel:
- **Client** window tabs: **Marketing, Quotes, Projects, Client Jobs, Invoices, Payments and Balance**.
- **Quotes to Clients** window.
- **Invoices to Clients** window.
- **Payments from Clients** window.
- **Balances of Clients** window.



**Projects** section of Navigation Panel:


- **Project** window tabs: **Main**, **Tree**, **Client Jobs**, **Corporate Jobs**, **Freelance Jobs**, **JAs**, **POs**, and **Balance**.
- **Client Jobs** window.
- **Corporate Jobs** window.
- **Freelance Jobs** window.
- **Project Balances** window.


**Corporate Team** section of Navigation Panel:

- **Corporate Expert** window tabs: **Corporate Jobs**, and **JAs**.
- **Corporate Jobs** window.
- **Job Assignments** window.
- **Corporate Expenses** window.

**Freelancers** section of Navigation Panel:

- **Freelancer** window tabs: **Application**, **Quotes**, **Freelance Jobs**, **POs**, **Payments**, **Balance**.
- **Quotes from Freelancers** window.
- **Freelance Jobs** window.
- **POs to Freelancers** window.
- **Payments to Freelancers** window.
- **Balances of Freelancers** window.

 **Note:** Global date filter affects the whole database. If you change it in one tab or window, it will be changed globally throughout **Projetex** database.

 **Note:** Global date filter setting is saved when you close the program and will be used next time you run **Projetex**.


## Projetex Menu Bar

### Workstation

**Workstation** menu is used for basic working session operations:

- **Log In** option is available in offline mode and can be used to connect to **Projetex Server** without the need to re-run **Projetex Workstation**.

- **Log Out** option is available in online mode and can be used to terminate connection to **Projetest Server** (for example, when you need to log in under different user account).
- **Server** command opens **Network Location** window where you can select a computer with **Projetest Server** installed to connect to.
- **Connected Users** command can be used to view other workstations currently connected to **Projetest Server**. You can disconnect selected user using **Disconnect** button.
- **Exit** command ends your work session with **Projetest Workstation**.

 **Note:** **Server** command is available only when you are logged out (i.e. Log In and Server commands are both dimmed when Log Out command is available and vice versa).

## Navigation

**Navigation** menu can be used to quickly access any window or tab of **Projetest**.

**Navigation** menu structure is identical to that of **Navigation panel**. **Client**, **Project**, **Corporate Expert** and **Freelancer** commands include a submenu to the right, which gives access to the tabs of the corresponding windows.

**Navigation** menu can also be used to change the style of navigation panel.

- **Classic** command will change the navigation bar to the mode which allows opening only one section at a time.
- **Modern View** command will change the navigation bar to mode which allows opening multiple sections at any given time.

## New...

**New...** menu can be used to quickly create new client and contact records in **Projetest** database. This menu has the following items:

**Client** — add a new client record to database.

**Account** — create a new client account.

**Contact** — add a new contact of a client.

**Service** — add a new service to database, and assign general prices for this service.

**Quote** — issue a new quote to selected client.

**Job** — issue a new Client Job to selected client.


**Invoice** — issue a new invoice to selected client.

**PO** — issue a new PO to selected freelancer.

## Team

**Team** menu can be used to provide better team cooperation while working with files in [Projetex9](#):

**Upload Changes** — open **Upload Changes** window to find and upload all locked files modified on a local PC.

 **Note:** [Projetex](#) will find only those unloaded files which have been *already locked* by the current user.

**Clear Locks** — open **Clear Locks** window to clear locks on files locked by the current user.

## Custom Reports

**Custom Reports** menu opens the [Projetex Reports-View](#) window containing the list of reports you can generate.

### Report View Window

This window displays the list of all reports currently integrated in database.

**Preview** button is intended for viewing the selected report.

**Print** button opens printer setup options dialog.

**Export** button saves the report result in a separate .rtf, .html., .pdf or .xls format. Click on **Export** button to open **Export** window in which you can select a necessary format and save the report.

## Settings

**Settings** menu provides access to your [Projetex Workstation](#) user options and configuration.

- **Corporate** command opens **Corporate Settings** window.
- **Current User** command opens **User Settings (Current User Only)** window.
- **Local Business Folder** allows to select drive your *ServerBusiness* folder is located on

## Help

**Help** menu contains links to this help file, support and contacts, registration options, including:

- **Projetex Help** command opens this [Projetex Help System](#).
- **Projetex on the web** opens [Projetex](#) official web-page.
- **Technical Support** command opens [Projetex](#) area on AIT Help Support portal.
- **Projetex Newsletter** shows [Projetex Newsletter](#) web-page, where you can subscribe to get latest [Projetex](#) news.
- **Check for Updates** command opens **Checking for Updates** window.
- **System and Locale Info** displays **System Information** window with your system and locale

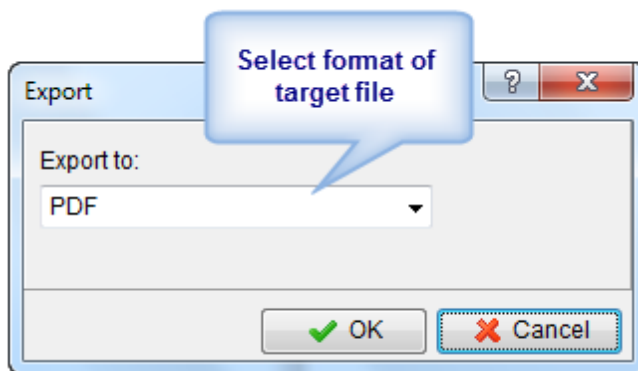
information, which could be useful in case of writing to customer support.

- **Register** command (which changes to **Upgrade** after you register the program) shows registration dialog, where you can enter your **Projetex Workstation** license key when registering or upgrading the program.
- **About** command displays version and build information of your **Projetex Workstation**.

## Export Window

### Export

Export window can be used to select an export format.



- Choose **Open after export** checkbox to automatically open the exported file after finishing of an export procedure.
- Click **OK** button to proceed with exporting to currently selected format.
- Click **Cancel** button to close **Export** dialog.

### Export to XLS, CSV or TXT

To export data to *XLS*, *CSV* or *TXT*, select **XLS**, **CSV** or **TXT** from the **Export to** drop-down list on the **Export** window. Choose **Open after export** checkbox to automatically open the exported file after finishing of the export procedure

### Export to HTML

In the **Export to .html** window you can set properties of output file when exporting to .html format.

It opens when you select **HTML** from the **Export** to drop-down list on the **Export** window.

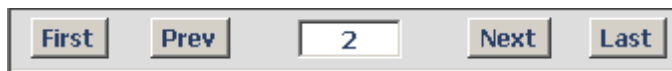
## Settings for exporting to .html

Page range:

- select **All** to export all pages of the source;
- select **Current page** to export only the page which you are currently viewing;
- select **Pages** and specify the numbers in the text box provided to print only certain pages.

Export settings:

- select **Styles** to save style setting of the source when exporting;
- select **Pictures** to enable exporting pictures from the source file;
- select **All in one folder** to store all newly created files of the .html page in one folder;
- select **Page navigator** to add the page navigator (see the screenshot below) to your new .html file;



- select **Fixed width** to fix the width of the columns and rows of the exported pages (pages will not extract and contract according to the window size);
- select **Multipage** to export data to a multi-page .html file;
- select **Background** to keep the view of the background in the target .html file.
- choose a format of pictures from **Pictures** drop-down list to save pictures in a specified format.

To automatically open the new file after finishing of the export procedure, select **Open after export**.

## Export to RTF

In the **Export to RTF** window you can set properties of output file when exporting to .rtf format.

It opens when you select **RTF** from the **Export to** drop-down list on the **Export** window.

## Settings for exporting to .rtf

Page range:

- select **All** to export all pages of the source;
- select **Current page** to export only the page that you are currently viewing;
- select **Pages** and specify the numbers in the text box to print only certain pages.

Export settings:

- select **Pictures** to enable exporting pictures from the source file;
- select **WYSIWYG** (What You See Is What You Get) to make the .rtf file look exactly as the picture you see on the screen
- select **Page breaks** and page breaks will be compulsively inserted in the .rtf file;
- select **Text**, **Header/Footer** or **None** from **Header/Footer** drop-down list for header and footer to be shown properly.

To automatically open the new file after finishing export procedure select **Open after export** checkbox.

## Export to PDF

In **Export to PDF** window you can set properties of output file when exporting to .pdf format.

It opens when you select **PDF** from the **Export to** drop-down list on the **Export** window.

## Settings for exporting to .html

Page range:

- select **All** to export all pages of the source;
- select **Current page** to export only the page you are currently viewing;
- select **Pages** and specify the numbers in the text box to print only certain pages.

Export settings

- select **Compressed** to create a .pdf file of minimal size;
- select **Embedded fonts** to create a .pdf file with all used fonts embedded (using this option you can be sure that you text will look the same on any computer, even if the fonts used are not installed there);
- select **Background** to keep the view of the background in the target .pdf file;
- select **Print optimized** to optimize the new .pdf file for printing at once.

To automatically open the new file after finishing export procedure select **Open after export**.

## General Clients Windows

### Client Window

**Client** window can be used to view, edit and enter new information about your *clients*, as well as to manage their *client jobs* and *job assignments* as well as some *marketing* and *financial information*, like prices, quotes and invoices of your clients.

## Client Window tabs

Different tabs of **Client** window represent different aspects and elements of your clientele database. Client data is broken by the following **Client** window tabs:

- **Main** tab — contains profiles of your clients. Client records can be created and marked as completed here. This tab also contains client profiles.
- **Contacts** tab — lists contacts of the selected client. New client contacts can be added here.
- **Marketing** tab — contains marketing information added by your sales representatives or marketing staff.
- **Prices** tab — holds individual price list of selected client. Here this client's prices can be created and edited.
- **Quotes** tab — is used for issuing and managing quotes offered to the selected client.
- **Projects** and **Client Jobs** tabs — these tabs contain projects and client jobs of the selected client.
- **Invoices** and **Payments** tabs — these tabs hold all invoices issued and payments made of the selected client. Here invoices are created, and linked with payments.
- **Balance** tab — provides the most basic overview of financial accounts of the selected client.
- **Files** tab — this tab is used for accessing selected client's files and folders.
- **Info** tab — is used for adding various client-related notes.
- **Schedule** tab — displays schematic schedules of projects and client jobs of the selected client.

### Main Tab of Client Window

**Main** tab of **Client** window can be used to manage your database of clients. It contains the list of all clients and their profiles.


## Clients list

You can search clients by name with the help of **Starts with** and **Contains** filters. Select **Starts with** option and enter first few letters of client's name in the field, and the cursor will jump to highlight first matching client's name in the list. Select contains option and enter any part of client's name being searched.

- Click any client in the list to view profile of this client to the right.
- Double-click any client in the list to edit their name, client code and change client currency.
- Once a new client has been added, his data can be edited in this profile.
- You can create a new client record based on data (profile, marketing, contact or pricing) of one of the existing clients by cloning this client. To do so, select a client to clone, and click **Clone** button.

- You can delete a client and all data related to this client (quotes, projects, jobs, invoices, etc.). To do so, select a client to delete, and click **Delete** button.
- Each client can have a flag assigned to it. Client flag can be changed by right-clicking the narrow field displaying flags.


Clients are listed in the form of table. Although by default this table contains single column (**Name**), you can add your custom fields to view by right-clicking the client list and then clicking **Customize Columns** in the context menu.

 **Note:** Due to user access restrictions, some filter operations (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 clients list displays if all of the clients are shown.

## Client profile

On the right side of the **Main** client tab, you have three tabs: **Client Profile**, **Accounts** and **Custom**, which allow you to review and modify the client's information. Click appropriate button to add or edit client profile information.

- **Client code** — click this button to enter or change the client's code (15 characters maximum). This is the same code, which had been assigned, manually or automatically, when creating the new client record. This code is also used for naming client folders as well as in codes for Invoices and quotes.
- **Name** — click this button to edit this client's name. This name can be up to 150 characters long.
- **Account Managers** — this field lists client accounts and account managers assigned to them. Click **Account Managers** button to *assign or remove Account Managers* to this client's accounts.

 **Note:** Only users with advanced access rights can assign account managers.


- **Postal Address** — click this button to add or change a postal address of the client.
- **Contact Info** button — allows you to add or change contact information of the client.
- **Web site** — opens **Edit Website of Client** dialog box, providing field for entering a web site address (URL) of your client. Click **Go** button to open this site in your Internet browser. Web site address can be up to 120 characters long.
- **Payment Terms** — allows you to specify payment terms for each client, and their minimum fees. According to this information **Projetex** will determine if your invoices to client are outstanding, overdue or will be due soon.
- **VAT Number** — enter client's legal tax number to have it automatically displayed and printed on invoices.
- **Client Folder** — this part of client's profile can be used to quickly create client's folder and access client files. Click **Create** button to automatically create a folder, tied to this client. The location of client folder will depend on the **location of centralized Business folder**, assigned with the help of **Projetex Server**. **Explore** button becomes active only after client folder has been created. Click it to open the client's folder in the Windows Explorer window.



- **Client Currency** — this currency will be used to issue quotes and invoices to this client, and to record payments from this client. All the financial records for this client are kept in both your base currency and client currency, converted according to exchange rates which you set.
- **Next Codes** — click this button to edit the automatic counters for client-specific codes of quotes, client jobs, invoices and payments. **Projetex** will use the codes for the next quote, client job, invoice and payment you create. You can only increase the next code value.
- **Locale Format** — different clients usually have different requirements to displaying dates, numbers and monetary values. Locale format settings are used to configure this format individually for each client. These formats will then be applied to printable invoices.
- **Invoicing Policy** — by adjusting invoicing policy you determine conditions upon which **Projetex** will prompt you to invoice client jobs.
- **FTP connections** — you can set parameters for access to FTP folders of this client. Shortcuts to these folders will be automatically added to **Files** tab of this client's window.
- **General Information** — any additional information which did not fit into any of the other sections can be entered here.

## Client accounts

To add or delete client accounts, click **Client Accounts** tab. All accounts of currently selected client can be viewed on the **Client Accounts** tab.

 **Note:** Only users with advanced access rights have access to this tab.

## Custom data of client

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

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

## Postal address of client

Postal address of client determines this client's country, and is automatically added to invoices and quotes sent to this client. The following postal address data can be added:

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

**City** — maximum 40 characters long.

**State** — maximum 40 characters long.

**Country** — you can add additional countries to the list of countries in the **Postal Address of Client** window. See [Countries](#) topic for details.

**ZIP Code** — maximum 10 characters long.

### General contact information

Clients in **Projetex** have two types of contact information: general and contact information of client's contact persons (Contacts of Client). General contact information of a client can contain the following data:

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

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

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

General contact information of a client can also be added to templates with the help of [Client Information Variables](#).

### Payment terms of client

According to the payment terms of a client, **Projetex** will keep track of unpaid invoices and update status of outstanding invoices: overdue, due today, due tomorrow, and so on.

With the help of **Edit Payment Terms** dialog you can configure payment conditions of a selected client, including:

**Minimum Fee** — this is the minimum sum the invoices must accumulate, before they can be paid. Type 0 in this field to disable minimum fee condition.

You can also indicate if invoice should be paid within certain time (30, 45, 60, or 90 days) from the day it was sent (invoice issue date) or on certain day of certain month.

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

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

### Next client codes

Codes of quotes, client jobs, payments and client-specific codes of invoices are generated automatically each time a new quote, client job, payment or invoice is entered into database. Prefix of these codes depends on client's name. The digits after — represent the counter code.

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

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

To open **Next Codes for Client** window click **Next Codes** button in this *client's profile*.

### Locale format of client

Clients from different countries are very likely who have different locale format. There is no need to change your own locale format each time you print invoice for a client with locale format different from yours.

To have invoices to clients printed according to their own *Regional and Language options* (normally defined in *Windows Control Panel*), *Projetex* can use separate locale format for each of your clients.

The following locale settings can be configured:

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

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


**No. of digits after Decimal** — *Projetex* will round up all numbers in the documents to a number of decimals specified here. Set this parameter to 0 if the currency of a client does not have decimal units. Most commonly number of digits after decimal is 2.


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

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

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

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

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

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

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

### Invoicing policy of client

Invoicing policy settings determine when *Projetex* alerts user to invoice a client job. According to these settings *Projetex* will assign one of the following statuses to uninvoiced client jobs: **Not ready for invoicing** or **Ready for invoicing**, following by comment, depending on the current *invoicing policy settings*, for example, "**Total reached**".

These statuses can be viewed on the **Client Jobs** tab of **Project** window, **Client Jobs** tab of **Client** window and **Client Jobs** window.

The screenshot shows the Projex Translation Management System for Translation Agencies. The main window is titled 'Client: The Illustrative Designs' and has several tabs: Main, Contacts, Marketing, Prices, Quotes, Projects, Client Jobs, and Invoices. The 'Client Jobs' tab is selected. Below the tabs, there is an 'Edit' button, a 'Status' dropdown menu set to '\*All\*', and an 'Invoiced' dropdown menu set to '\*All\*'. Below this, it says 'Record(s) 1...9 of 9 (Page 1 of 1)' with navigation arrows. A table of job records is displayed with the following columns: Code, Job Name, Assigned, Deadline, and C. The table contains 9 rows of data. At the bottom of the window, a status bar indicates 'Ready for invoicing: Total reached'.


Code	Job Name	Assigned	Deadline	C
J-ILLDES0001	Tooltips translation	30.12.2010	21.01.2011 18:00	21.0
J-ILLDES0002	Localization of interface strings	03.05.2011	09.05.2011 18:00	09.0
J-ILLDES0003	User hints translation	30.12.2010	03.02.2011 18:00	14.0
J-ILLDES0004	Creative Engineering	30.07.2011 09:00	02.10.2011 18:00	
J-ILLDES0005	Creative Engineering - additional materials	26.07.2011 09:00	21.10.2011 18:00	
J-ILLDES0006	DTP check	30.07.2011 09:00	02.11.2011 18:00	
J-ILLDES0007	Interface localization	30.12.2010	23.02.2011 18:00	27.0
J-ILLDES0008	Interface corrections	30.12.2010	01.03.2011 18:00	01.0
J-ILLDES0009	Virtual Interface Notes - MS terminology proo	30.12.2010	01.04.2011 18:00	29.0

By default invoicing policy for all the clients states that client jobs must be invoiced immediately after it has been completed.

Invoicing policy can prompt you to invoice client jobs once their total has reached a certain amount.

Select **Wait for accrual** check box, to enable time limit within which invoice must be created whether required total has been reached or not. This will make all client jobs display as "ready for invoicing" if specified amount of time has passed since their completion.

To configure your invoicing policy for a certain client, click **Invoicing Policy** button in this *client's profile*.

 **Note:** If Invoicing policy is set to **Immediately after completing job**, then **Not ready for invoicing** or **Ready for invoicing**, message will not be displayed.

### Client FTP connections

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

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

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

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

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

**Password** — this password will be used when **Projetex** attempts to connect to FTP. Can be no longer than 50 characters.

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

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

## Client Jobs

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 **Current User Settings**.

Also, if a job has any status other than **Normal**, it will be highlighted either in red or in green:

Job Name	
Engine shceme ER-34221	<b>This Job has On Hold status</b>
Veni Vidi Vici	<b>This Job has Planned status</b>
Nam tempus	

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

## General Windows of Corporate Team

### Corporate Expert Window

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

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

### Corporate Expert Window tabs

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

- **Main** tab — contains the list of your corporate experts and their profiles.
- **Corporate Jobs** tab — gives an overview of corporate jobs assigned to selected corporate expert.
- **JAs** tab — is used for managing job assignments (*JAs*) for selected corporate expert.
- **Files** tab — provides quick access to selected corporate expert's folder, as well as to other files related to this expert.
- **Info** tab — this tab is used for creating various notes, related to the selected corporate expert.
- **Schedule** tab — gives a schematic overview of corporate jobs assigned to the current corporate expert.

### Main Tab of Corporate Expert Window

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


## Browsing corporate experts

You can search experts by name. Select Starts with option and enter first few letters of expert's name in the field, and the cursor will jump to highlight first matching expert in the list. Select Contains option and enter any part of expert's name being searched.

- Select any expert in the list to view profile of this expert to the right.
- Once a new expert has been added, their data can be edited in this expert's profile.

Each expert can have a flag assigned to him/her. Expert flag can be changed by right-clicking the narrow field displaying flags.

Experts are listed in the form of table. Although by default this table contains single columns **Name** and **Flag**, you can add your custom fields to the list of experts by right-clicking the expert list and then clicking Customize Columns in the context menu.

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

## Expert profile

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

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

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

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

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

**Expert Folder** — this part of expert profile can be used to quickly create expert folder and open it in *Windows Explorer*. Corporate experts will be able to access only this folder (provided proper folder access options have been set up).

Click **Create** button to automatically create expert's folder inside *Business* folder. *Projetex* will automatically link expert's folder to appropriate expert. The location of expert folder will depend on the **location of Business folder**. **Explore** button becomes active only after expert folder has been created.

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

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

## Custom fields of Corporate Experts

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

### Contact Information of Expert

General contact information of expert contains the following fields:

**Photo** — an image file can be maximum 70x70 pixels. Click **Photo** button to add a photo to contact's profile. Click **X** button to remove current photo from profile. The following formats can be used: .JPG, .JPEG, .BMP (bitmap), .GIF (Graphics Interchange Format).

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

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

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

See also:

[Countries section of Corporate Settings](#)

### Assign Next Expert Codes

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

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

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

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

### Expert FTP connections

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

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

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



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

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

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

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

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

## General Freelancers Windows

### Freelancer Window

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

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

### Freelancer Window tabs

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

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

- **Info** tab — this tab is used for creating various notes related to the selected freelance expert.
- **Schedule** tab — gives a schematic overview of freelance jobs, presented in a form of **Schedules**.

### Main Tab of Freelancer Window

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

### Browsing Freelancers

You can search freelancers by name. Select **Starts with** option and enter first few letters of freelancer's name in the field, and the cursor will jump to highlight first matching freelancer's name in the list. Select **Contains** option and enter any part of freelancer's name being searched.

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

Click any freelancer in the list to view profile of this freelancer to the right.

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

Freelancers are listed in the form of table. Each freelancer can have a flag assigned to him or her. Freelancer flag can be changed by right-clicking the narrow field displaying flags. Although by default it contains **Name** and **Flag** columns, you can add your custom fields to view by right-clicking the freelancers list and then clicking **Customize Columns** in the context menu.

### Freelancer profile

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

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

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

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

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

**Web-site** — Click **Go** button to open this freelancer's web-site in your Internet browser. Web site address can be up to 120 characters long.

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

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

displayed in this freelancer's printable documents.

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

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

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

**Expert folder** — Freelancer folder contains jobs, purchase orders, payments prices and quotes information of freelancer. Projetex automatically creates, updates and maintains links between freelance experts in database and their folders. Expert code of this freelancer is used as folder name. Once the folder has been created, its location in **Business folder** is displayed in **Expert folder** field. Click **Explore** button to open this folder in your file explorer.

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

**General Information** — freelancer's profile can contain any general information, relevant to this freelancer in a form of plain text note.

## Custom data of Freelancer

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

 **Note:** Only users with access to Projetex [Server Administrator](#) can add or remove custom fields.

### Postal address of freelancer

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

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

**City** — can be maximum 40 characters long.

**State** — maximum 40 characters long.

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

**ZIP Code** — maximum 10 characters long.

### General Contact Information of freelancer

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

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

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

### Payment Terms of Freelancer

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

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

**Minimum Fee** — this is the minimum sum the POs must accumulate, before they can be paid. Type 0 in this field to disable **Minimum Fee** condition.

You can also indicate if PO should be paid within certain time (30, 45, 60, or 90 days) from the day it was sent (*PO issue date*) or on certain day of certain month.

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

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

### Locale Format of Freelancer

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

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

The following locale settings can be configured:

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

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


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


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

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

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

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

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

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

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

### Next Codes of Freelancer

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

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

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

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

## Projetex Server interface

### Corporate Settings

The following **Corporate Settings** are available:

- **General** — Selecting or changing **base currency** for accounting, default **payment terms** for freelancers and **postal address format**.
- **Users and Access** — Adding or deleting users, modification of users' access rights.
- **ODBC Access** — Enable ODBC access to Projetex database.

- [Access Roles](#) — Creating and editing templates for access, which can be used when creating or editing access rights of individual users.
- [Codes](#) — Viewing and editing of global codes ([projects](#), [invoices](#), [POs](#)) and mode of naming of .rtf files.
- [Folders](#) — Settings for folder automation.
- [Salutation](#) — Default contact salutations, which are available for contacts.
- [Custom Fields](#) — Creation and modification of company-wide custom database fields for [clients](#), [projects](#), [corporate experts](#), [freelancers](#) and [corporate expenses](#).
- [Custom Variables](#) — Custom global template variables, used for generation of .rtf files.
- [Custom Queries](#) — Create custom queries to retrieve necessary data out of the database.
- [Custom Reports](#) — Create custom reports to fit your reporting needs and requirements.
- [CATCount](#) — Enabling and disabling [CATCount](#) feature and selecting [CATCount](#) units.
- [Sound Alerts](#) — Manage sound notification under set conditions.

## Projetex Operations

### Managing Clients

#### Adding/Editing Client Profile

There are two ways of creating a new client record in [Projetex](#):

**A** — Using [New...](#) menu. To create a client record, on [New...](#) menu click [Client](#) command, and follow the steps of [New Client Wizard](#). This option may not be available for some of the users due to access rights limitations.

**B** — Creating a new client on the [Main](#) tab of [Client](#) window. To create a client record, follow the steps below:

1. Click [New Client](#) button above the [Client](#) list on the [Main](#) tab of [Client](#) window.
2. Choose [New Client Wizard](#) or [Quick Creation](#) option. If you chose [New Client Wizard](#) option, follow all the steps of it to create a new client. If you chose [Quick Creation](#) option, fill the following fields:
  - Enter a name of the client in [Name](#) text field.
  - Enter a code for the client record in [Code](#) text field (12 symbols maximum) or click [AUTO](#) button to generate the code automatically (it will usually contain the first letters of [Name](#) in this case).
  - Select [Client Currency](#) using the corresponding drop-down list.
  - Click [OK](#) to confirm or [Cancel](#) to discard the entered information.

## Cloning a Client

In case the client you are about to create, has the same or similar data as one of the existing clients, client cloning option can be used to copy selected data from existing client to a new one.

To clone a client:

1. Open **Main** tab of **Client** window.
2. Select a client to clone.
3. Click **Clone** button.


The following data can be copied:

**Profile** — although it is unlikely that two different clients will have a same profile information (like address or contact details), some information such as payment terms, invoicing policy and locale settings may be common.

**Contacts** — cloning contacts (**Contacts** tab of **Client** window) data may save time when creating a client for new department or subsidiary of an existing client.

**Marketing** — marketing information (**Marketing** tab of **Client** window) can also be cloned.

**Prices** — if a new client has same or similar prices (**Prices** tab of **Client** window) as one of the existing clients, this data can also be cloned.

 **Note:** To disable cloning of some information mentioned above, deselect the appropriate checkboxes after you pressed **Clone** button..

## Adding/Editing Contacts of Client

A client can have a number of contacts. Each contact has own contact details, and can be assigned as "client PM" to this client's projects. Contacts of clients can be also put into attention field of this client's invoices.

There are two ways of creating a new contact in **Projetex**:

**A** — Using **New Contact Wizard**. To create a contact, on **New...** menu click **Contact**, and follow the steps of **New Contact Wizard**. This option may not be available to some of the users due to their access rights limitations.

**B** — Creating a new contact of a client on the **Main** tab of **Client** window. To create a contact, follow the steps below:

1. Open **Main** tab of **Client** window.
2. Select a **Client**.
3. Click **Contacts** tab.
4. Click **New** button.
5. Fill in the fields in the **New Contact** window.

## New/Edit Contact Window

This window can be used to add or edit contact details. The following data can be added to a contact profile:

**Photo** — up to 110x120 pixels. Click **Photo** button to add a photo to contact's profile. Click **X** button to remove current photo from profile. The following formats can be used: .JPG, .JPEG, .BMP (bitmap), .GIF (Graphics Interchange Format).

**Salutation** — select one of the salutations, entered with the help of **Corporate Settings** tab of **Projex Server Administrator**. This salutation can then be automatically displayed on all printable documents next to this contact's name.

**Name** — maximum 80 characters.

**Title** — maximum 40 characters. Like salutation, title will also be automatically displayed on printable documents.

**E-mail** (up to 2) — maximum 150 characters. **Send** button becomes active only if valid e-mail address is entered.

**Phone** (up to 4) and **Fax** numbers — maximum 150 characters each.

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

## Creating Accounts

Client accounts can be created for any of the existing clients by any user with *Advanced* access rights (must be set in **Projex Server Administrator**).

There are two ways of creating a new client account for one of the clients in **Projex**:

**A** — Using **New...** menu. To create a client account, on **New...** menu click **Account**, and follow the steps of **New Client Wizard**. This option may not be available to some of the users due to their access rights limitations.

**B** — Creating a client account on the **Main** tab of **Client** window. To create a client account, follow the steps below:

1. Open **Main** tab of **Client** window.
2. Select the client.
3. Click **Accounts** tab.
4. Click **New** button.
5. Enter properties of the new account in **New Client Account** window.
  - Enter a name of the new account in **Account Name** field.
  - (optional) Select **Default Account** check box if you wish to make new account default one for this client. This step can be done at any time later.
  - (optional) Select Client's **Project Manager** for this account. Client PM will be automatically set as PM of each project of this account. This step can be done at any time later.



- (optional) Assign account managers to the new account. This step can be done at any time later.

## Assigning Account Managers


To assign or remove an account manager, you need to have production manager access rights. There are two ways of assigning account manager: when editing or creating a client account, and in the **Client Profile** tab itself, by clicking **Account Managers** button.

To assign account manager to a client account:

1. Open **Main** tab of **Client** window.
2. Select a client, to which you wish to assign account managers.
3. Click **Accounts** tab.
4. Select an account and click **Edit** button.
5. To assign an account manager to client account, select this manager in **Available Staff** field, and click **<<Assign** button.
6. To remove an account manager from client account, select this manager in **Assigned Staff** field, and click **Remove>>** button.

## Setting Default Account

Any existing account can be made default. Since there can be only one default account, previously assigned default account will automatically lose *Default* status.

 **Note:** Only users with *Advanced* (production manager) access rights can set *Default* status for an account.

To assign a *Default* status to an existing account:

1. Open **Main** tab of **Client** window.
2. Select a **Client**.
3. Click **Accounts** tab.
4. Double-click the required account, (alternatively, you can select the required account and click **Edit** button).
5. Select **Default Account** checkbox in **Edit Client Accounts** window.

Selected account will then be set as default account for this client.

## Managing Experts

### Adding/Editing Experts

#### Adding corporate expert

1. Click **New Corporate Expert** button above the **Corporate Experts** list on the **Main** tab of **Corporate Experts** window.
2. Fill the following fields in **New Corporate Expert** dialog:
  - Enter a name of the corporate expert in **Name** text field.
  - Enter the code for the expert record in the **Code** text field (12 symbols maximum) or click **AUTO** button to generate the code automatically (it will usually contain the first letters of the **Name** in this case).
  - Click **OK** button to confirm or **Cancel** button to discard the entered information.
3. Click the appropriate buttons in corporate expert profile to enter **Contact Info**, **Next Codes**, **AHC** (average hourly cost) and **FTP connections**.

#### Adding freelancer

1. Click **New Freelancer** button above the **Freelancers** list on the **Main** tab of **Freelancers** window.
2. Fill the following fields in **New Freelance Expert** dialog:
  - Enter a name of a freelancer in the **Name** text field.
  - Enter the code for the freelancer record in the **Code** text field (12 symbols maximum) or click **AUTO** button to generate the code automatically (it will usually contain the first letters of the **Name** in this case).
  - Select the **Expert Currency** using the corresponding drop-down list.
  - Click **OK** to confirm or **Cancel** to discard the entered information.
3. Click appropriate buttons in freelancer profile to enter **Postal Address**, **Contact Info**, **Web-site**, **Payment Terms**, **VAT number**, **Next Codes**, **Locale Format** and **FTP connections**.

### Searching freelancers

#### Freelancers search by name

You can search freelancers by name. Select **Starts with** option and enter first few letters of freelancer's name in the field, and the cursor will jump to highlight first matching freelancer's name in the list. Select **Contains** option and enter any part of freelancer's name being searched.

## Freelancers search by price, service or completed jobs

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

*Freelance search* using **Search** button in *Projetex* can be done either by services from freelancer's price list or by jobs types completed by this expert. This includes *languages*, since services can employ language pairs. Since prices are added per certain service, search by prices employs both search by language pairs and by rates.

The following search options are available:

- *Basic search* which can be conducted on the **Main** tab of **Freelancer** window. To search freelance experts here, click **Search** button over the list of the freelancers. This search is intended for quick browsing through long lists of freelancers.
- *Freelance team search* — when creating a group of freelancers pre-searched for certain project. To search freelancers for a freelance team, open **Project** window, select required project and click **Freelance Team** tab. Click **Search** button to begin searching freelancers for this team.

The main difference between *basic search* and *freelance team search* is that experts found with the help of *freelance team search* can be added to this freelance team, while *basic search* simply allows quick browsing of the found freelancers data with an option to jump to this expert's profile.

Controls for **Search Freelance Experts** window are identical in both cases.

**By** — select the type of search. Selecting **Prices** will make *Projetex* search for freelance expert by prices entered in his or her individual price list. Selecting **Completed Jobs** will make *Projetex* search for freelancer by freelance jobs he or she completed. See *Prices of freelancer* and *Freelance jobs of freelancer* topics for details.

**Service** — items in this drop-down list represent combinations of groups of services and services which must be a search criteria. Usually services are broken by language pairs.

Selecting **Vacant Only** check box (available for *freelance team search* only) will filter the services in the list leaving only those corresponding to vacant freelance jobs in the currently selected project.

**Units** — if the search is conducted *by completed jobs*, this parameter is optional.

**Upper price limit** — entering *upper price limit* will limit the search to those freelancers whose price lists, or prices set in freelance jobs for the selected service are lower or equal than the upper price limit.

**Country** — this field add a search criteria by country from [Postal address of freelancer](#).

Search result window provides the following information about freelance translators, which matched searched criteria: *Freelancer* name, *prices*, *general information*, *quotes* and *job* history.

It is possible to introduce additional search parameters using **Local Custom Filter** at the bottom of **Freelance search** window.

## Creating Corporate Expenses

All corporate expenses information can be added or changed in **Edit Corporate Expense** window.

To add a corporate expense:

1. Click **Corporate Team** section of navigation panel.
2. Click **Corporate Expenses** icon.
3. Click **New** button.

Corporate expense record contains the following data:

**Date** — this date is used by global date filter. See [Global Date Filter](#) topic for details.

**Value** — amount of corporate expenses entered in base currency. See [Base Currency of your company](#) topic for details on changing your base currency.

**Description** — plain text note any number of characters long.

**Custom fields** — use **Custom Fields** tab to access controls for filling any **Custom Fields** of **Corporate Expenses**, created with the help of [Projetex Server Administrator](#). See [Custom Fields](#) topic for details.

## Managing Prices and Services

### Managing General Price List

General price lists of clients and freelancers can be found on the **General Prices for Clients** and **General Prices for Freelancers** windows.

Use **New/Edit/Delete** buttons to create, modify or delete prices for clients and freelancers.

Use **Save/Save&Open/Print** buttons to save or print client or freelancers price list.


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

### Managing Individual Price Lists of Clients and Freelancers

Each client and freelancer has individual prices, unique to that particular client. Client's individual prices can be accessed on the **Prices** tab of **Client** window. Likewise freelancer's individual prices can be accessed on the **Prices** tab of **Freelancer** window.

Use **New/Edit/Delete** buttons to create, modify or delete prices for clients and freelancers.

Use **Save/Save&Open/Print** buttons to save or print client or freelancers price list.

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

## Copying Individual Prices from General Price List

Client and freelancer prices can be quickly copied from general client/freelancer price list to individual price list. To copy prices from general price list to individual price list:

1. Open **Client** or **Freelancer** window.
2. Click **Prices** tab.
3. Click **Copy from General** button.
4. Select a price in the **General Prices for Clients (General Prices for Freelancers)** area.
5. Click **Copy Price** button to copy current price. To copy all prices, click **Copy All Prices** button.

## Managing Services


Services represent types of work being performed in client jobs, corporate jobs and freelance jobs. Most services are translations of certain language pairs. There no limitation on the number of service types and names. Each service must belong to one certain group of services.

To add or edit a group of services:

1. On the **Settings** menu of **Projetex Workstation** click **Corporate Settings**.
2. In the **Corporate Settings** window click **Groups of Services**.
3. Click **New** button to add a new group of services, or click **Edit** button to open currently selected group for editing.
4. Enter or change name of service group on **New Service Group (Edit Service Group)** window.

To add or edit a service:

1. On the **Settings** menu of **Projetex Workstation** click **Corporate Settings**.
2. In the **Corporate Settings** window click **Services**.
3. Click **New** button to add a new service, or click **Edit** button to open currently selected service for editing.
4. Add or change volume unit information on the **New Service (Edit Service)** window.

 **Note:** You can use **New...** menu to create a service. To create a service, on the **New...** menu click **Service**, and follow the steps of **New Client Wizard**. This option may not be available to some of users due to their access rights limitations.

## Managing Volume Units

Jobs in **Projetex** can be measured in various volume units (words, characters, hours, and so on). There is a number of default volume units, but new volume units can be added.

To add or edit a volume unit:

1. On the **Settings** menu of *Projetex Workstation* click **Corporate Settings**.
2. In the **Corporate Settings** window click **Volume Units**.
3. Click **New** button to add a new volume unit, or click **Edit** button to open currently selected unit for editing.
4. Add or change volume unit information on **New Volume Unit (Edit Volume Unit)** window.

## Managing Quotes

### Creating Quotes

There are two ways of creating a new quote to client in *Projetex*:

**A** — Using **New Quote Wizard**. To create a quote to client, on **New...** menu click **Quote**, and follow the steps of **New Quote Wizard**. This option may not be available to some users due to their access rights limitations.

**B** — Creating a new quote to client on the **Quotes** tab of **Client** window. To create a quote, follow the steps below:

1. Open **Main** tab of **Client** window.
2. Select a **Client**.
3. Click **Quotes** tab.
4. Click **New** button.
5. Fill in the fields in the **New Quote** window.

### New/Edit Quote Window


This window can be used to add or edit client quotation details. Client quote can contain the following data:

**Client PM** — select one of client's contacts as project manager or contact for this draft project (on the client's side).

**Corporate PM** — select one of staff members to be project manager for this draft project (on your side).

**Date sent** — except for reference this date will also be used by **Global Date filter**.

**Code** — code of the quote is generated automatically. In this code "Q" character means that this is a quote, letters afterwards represent code of the client and the number is the value of quote counter for this client. Each client has independent code counter for quotes.

 **Note:** Although quote code cannot be edited directly, quote counter can be advanced forward by assigning higher next code value in the client's profile.

**Status** — settings in this drop-down list determine the color in which the quote will be shown in the list on **Quotes** tab of **Client** window or on **Quotes to Clients** window.

**Draft Project** — name of the quote. This will also become the name of a project created based on this quote. Draft project name may contain 100 characters maximum.

**Client Jobs** — lists draft client jobs of this quote. Right-click this table and click **Customize columns** command to configure which data should be displayed.

**Request for Quote, Answer** — enter a plain text note here.

**Custom Fields** — quotes can also contain custom data (for example custom statuses, dates or notes) added in the form of custom fields. If you have any custom fields in quotes to clients, their controls can be found on the **Custom Fields** tab.

**Quote folder** — quote folders are created in Quotes folder located inside each client folder. Quote code is used in naming the quote folder.

**Draft Timeline** — like a regular project, quote has *assigned* and *deadline* dates.

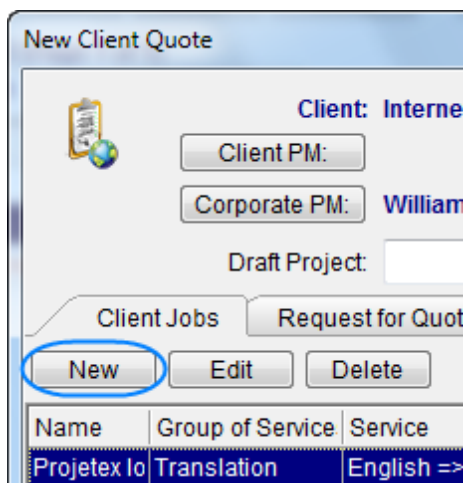
If client currency differs from your base currency, **Currency Exchange Rate** button will be available. By clicking this button, you may change the *currency exchange rate* used in this *quote*. Note that this button does not change general exchange rate stored in your **Projetex** database. To [change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

## Creating Draft Client Jobs

Draft client jobs can be created either in **Edit Quote** window right after creating a quote, or by selecting the quote and managing its draft client jobs in the table to the right.

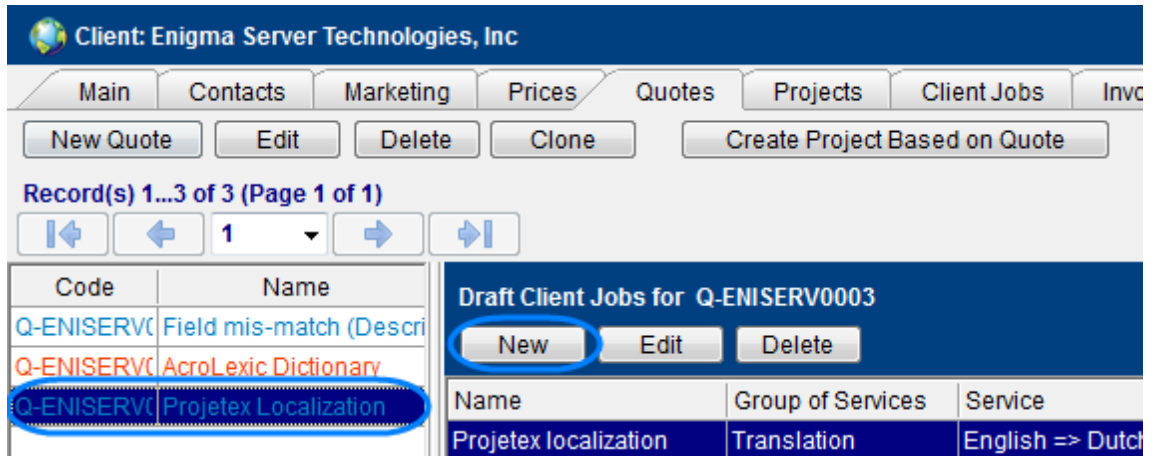
To add a draft client job from within **Edit Quote** window:

1. Open a quote by double-clicking it in the list.
2. Click **New** button on **Client Jobs** tab of **Edit Quote** window.



Alternatively, draft client jobs can be added without the need to open a quote.

1. Select a quote in the list of quotes on **Quotes** tab of **Client** window.
2. With the quote selected, click **New** button on the panel to the right.




## New/Edit Draft Client Job Window

**Name** — maximum 100 characters long.

**Group of services** — you can select any group of services available. To add or edit a new group of services, on the **Settings** menu click **Corporate**, 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, on the **Settings** menu click **Corporate**, and select **Services** section.

**Volume** — when entering volume being quoted, you can either use the volumes specified by client, or count client's file with built-in **AnyCount**. CAT analysis can also be used to devise draft job volume. To count a file, click **<=AnyCount** button. To enter CAT analysis or load **Trados** or **Logoport** log, click **<=CATCount** button.

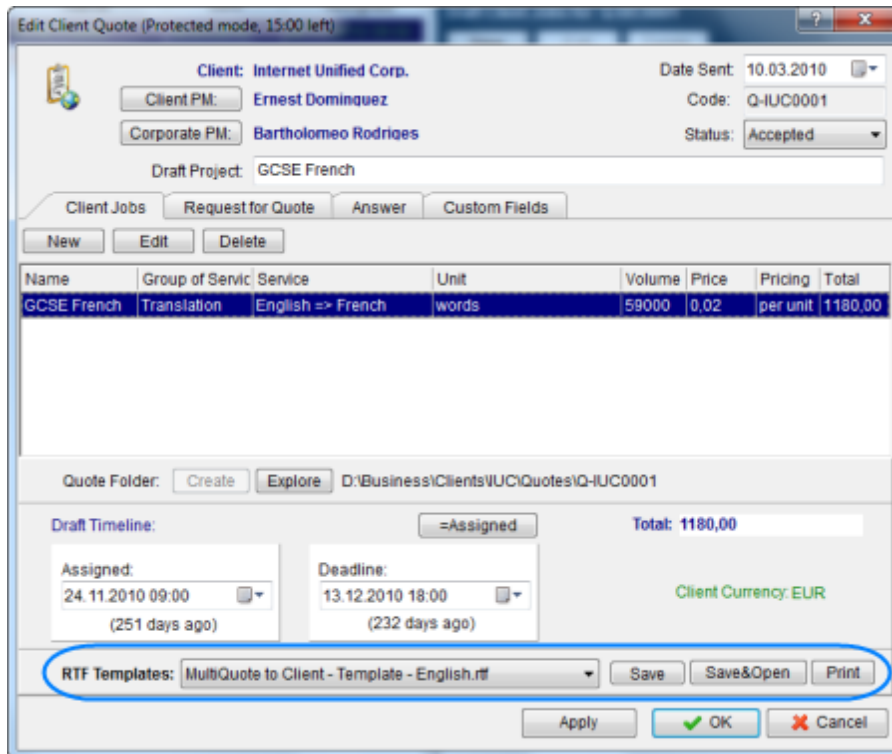
 **Note:** Make sure that correct volume units have been set before using **AnyCount** or **CATCount** options. Jobs in such volume units as, for example, hours cannot be counted with **AnyCount**.

**Price** — price value can be either entered manually or copied from the individual price-list of client. Click **<=Prices** button to copy price from client's price list. Click **=>** button to add this price to client's price-list.

## Saving and Printing Quotes

To print or save **Client Quote** as an RTF document, first apply changes made to this quote by clicking **Apply** button. Once the quote has been saved in database, RTF template controls for it will become active.





Use **RTF Templates** drop-down list to select the template which must be used for printing or saving this client quote in RTF file. Click **Save**, **Save & Open** or **Print** button to save or print this client quote.

**Note:** You can choose to save the output file in *RTF*, *DOC* or *PDF* format by selecting this format in **Save As** window with the help of **Save as type** drop-down list.

To edit templates for quotes, on **Settings** menu click **Current user** and select **Templates**. **Templates** for client quotes are located at *D:\BusinessServer\Templates\CLIENTS\Quotes\* folder.

## Managing Projects and Jobs

### Creating a project

*Projects* can be created from two areas of Projex:

**A:** On the **Main** tab of **Project** window by clicking **New Project** button.

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

### New Project window

**Name** — project name can be 150 characters long.

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

**Client Account** — this button can be used to assign a project to a different account of client.

Current account name and the list of responsible account managers are displayed next to **Client Account** button. See [Account Management](#) topic for details.


**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. See [Contacts List](#) topic for details on adding and editing contacts.


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

**Timeline** — timeline of a project in [Projex](#) 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.

**Optional Status** — these are used when project needs to be put *on hold*, or when you create *planned* (or potential) projects. Projects with *on hold* status have their deadlines undetermined, thus *on hold* projects cannot become overdue. *On hold* projects are highlighted in red. Projects with *planned* status cannot be set as completed, since *planned* status assumes that work has not yet started. *Planned* projects are highlighted in green.

 **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.

You can save project 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 projects.

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

See also:

[Project Template Variables](#)

[Main Tab of Project Window](#)

[Creating Client Job](#)

[Creating Corporate Jobs](#)

[Creating Freelance Jobs](#)

## Creating client jobs

Client jobs can be created in the following areas of [Projex](#):

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

- by right-clicking the tree view and selecting **New Client Job**
- by clicking **New Client Job** button at the top of the tree view.

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

**C:** Using **New Job Wizard**. To create a quote to client, on the **New...** menu click **Job**, and follow the steps of **New Quote Wizard**. This option may not be available to some of users due to their access rights limitations.

## New/Edit Client Job window

**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. See [Contacts List](#) topic for details on adding and editing options for Client PM field.

**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 [Projex](#) are broken down by groups. You can select any of the groups of services available. To add or edit a group of services, open menu **Settings > Corporate**, 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 **Settings > Corporate**, 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 **Settings > Corporate**, 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. See [AnyCount in Projex 8](#) and [CATCount in Projex 8](#) topics for details.

**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 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 [Projex](#) 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.

**Timeline** — timeline of a client job in [Projex](#) 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).

**Optional Status** — these are used when client job needs to be put *on hold*, or when you create *planned* (or potential) jobs. Jobs with *on hold* status have their deadlines undetermined, thus *on hold* jobs cannot become overdue. Jobs with *planned* status cannot be set as completed, since *planned* status assumes that work has not yet started.

**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 [Projex Server Administrator](#) can add or remove custom fields. See [Custom Fields](#) topic for details.

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

See also:

[AnyCount in Projetex 9](#)

[CATCount in Projetex 9](#)

[Client Jobs Template Variables](#)

## 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

**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 by groups. You can select any of the groups of services available. To add or edit a group of services open menu **Settings > Corporate**, 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 **Settings > Corporate**, 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 **Settings > Corporate**, and select [Volume Units](#) section.

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

[Projex 8](#) and [CATCount in Projex 8](#) topics for details.

**Time spent** — unlike client and freelancer jobs, corporate jobs cost is determined by multiplying time spent on the job by average hourly cost (AHC) of a corporate expert who completed it. Results are displayed in **Total Cost** string. *Projex* 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 *Projex* includes assigned, deadline dates and the date when the corporate job has been actually completed. **Deadline** and **Completed** values are taken into account when *Projex* determines status of corporate jobs (like due today, overdue and so on).

**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.

**Optional Status** — these are used when corporate job needs to be put *on hold*, or when you create *planned* (or potential) jobs. Jobs with *on hold* status have their deadlines undetermined, thus *on hold* jobs cannot become overdue. Jobs with *planned* status cannot be set as completed, since *planned* status assumes that work has not yet started.

**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 [Projex Server Administrator](#) can add or remove custom fields.

See [Custom Fields](#) topic for details.

You can save corporate 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 corporate jobs.

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

See also:

[AnyCount in Projetex 9](#)

[CATCount in Projetex 9](#)

[Corporate Expert Jobs Template Variables](#)

## 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

**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 by groups. You can select any group of services available. To add or edit a group of services, open menu **Settings > Corporate**, 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 **Settings > Corporate**, 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 **Settings > Corporate**, and select [Volume Units](#) section.

You can also use built-in [AnyCount](#) or [CATCount](#) tools to quickly count the job file, or calculate CAT text volumes (100% match, fuzzy match, and so on). You can also import [Trados](#) and [Logoport](#) logs

with the help of [CATCount](#) tool to quickly enter required volume. See [AnyCount in Projetex 8](#) and [CATCount in Projetex 8](#) topics for details.

**Price** — price can be entered manually or copied from freelancer'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 freelancer's price list. You can set a fixed price for freelance 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 free job must not necessarily be zero.

If freelance 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).

**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**.

**Optional Status** — these are used when freelance job needs to be put *on hold*, or when you create *planned* (or potential) jobs. Jobs with *on hold* status have their deadlines undetermined, thus *on hold* jobs cannot become overdue. Jobs with *planned* status cannot be set as completed, since *planned* status assumes that work has not yet started.

**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. See [Custom Fields](#) topic for details.

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 `\\.\Projotex 7.0\Projotex Workstation\Templates\EXPERTS\FREELANCE\Jobs` folder.

See also:

[AnyCount in Projotex 9](#)

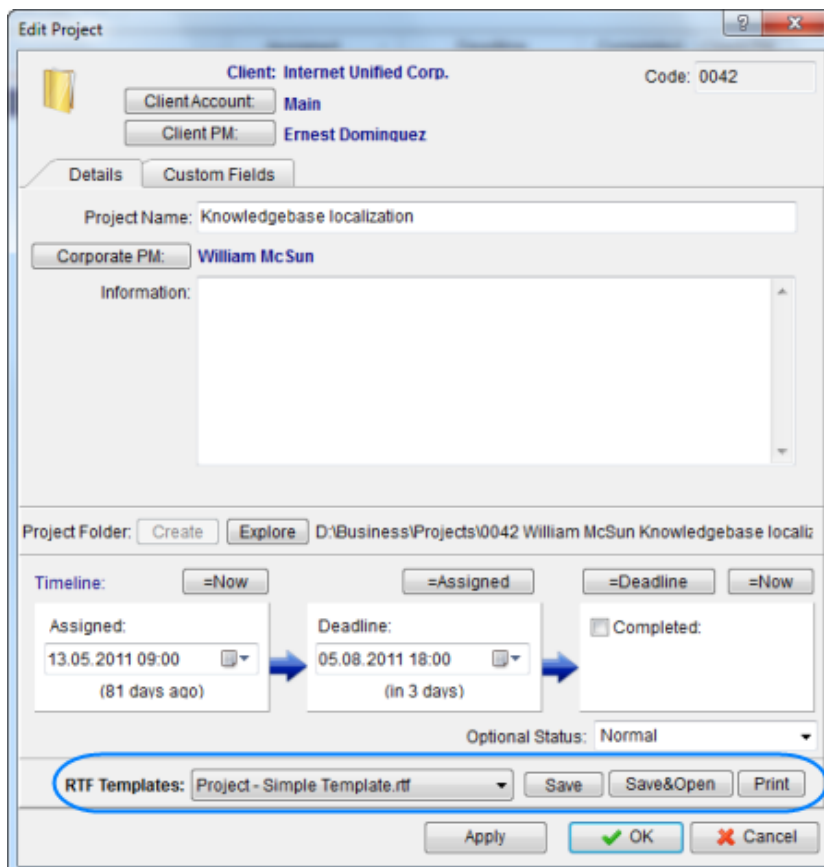
[CATCount in Projotex 9](#)

[Freelance Jobs Template Variables](#)


## Saving and Printing Projects and Jobs

### Saving and printing project

To print or save **Project** as an RTF document, open **Projects** tab of the **Clients** section and double-click necessary project record. Apply changes made to this project by clicking **Apply** button. Once the project has been saved in database, RTF template controls for it will become active.



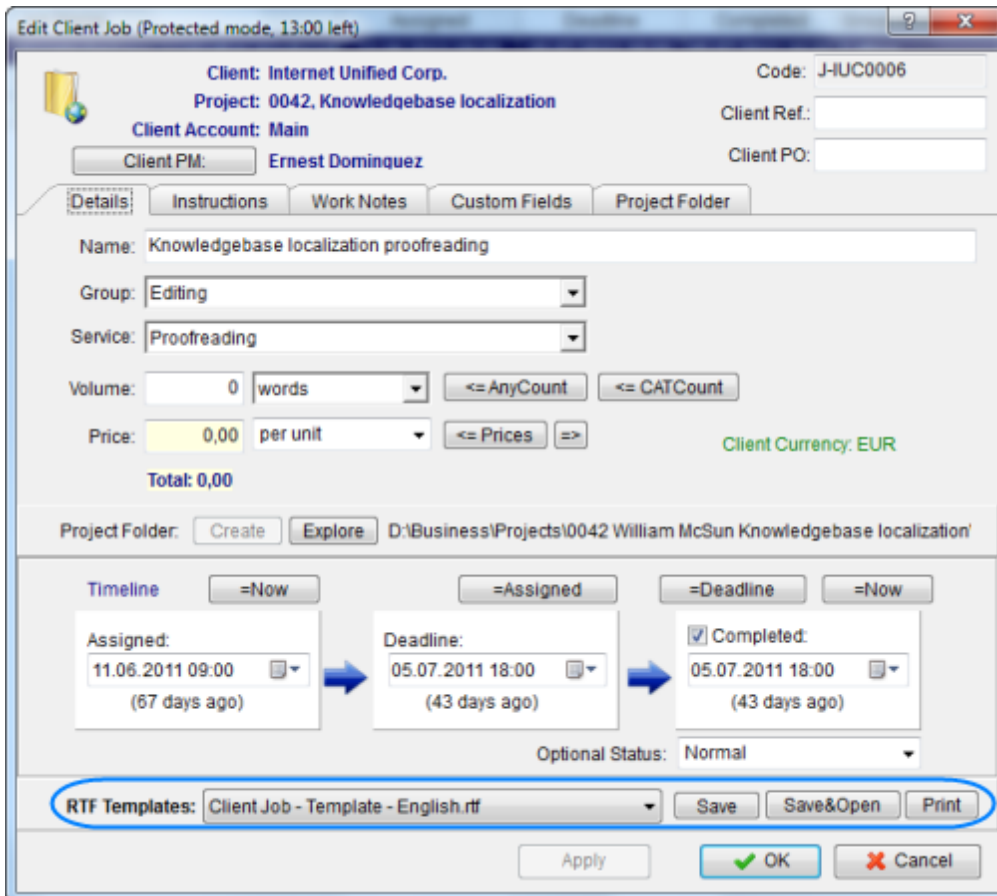
Use **RTF Templates** drop-down list to select the template which must be used for printing or saving this project in a form of RTF file. Click **Save**, **Save & Open** or **Print** button to save or print **Project**.

 **Note:** You can choose to save the output file in *RTF*, *DOC* or *PDF* format by selecting this format in **Save As** window with the help of **Save as type** drop-down list.

To edit templates for projects, on the **Settings** menu click **Current user** and select **Templates**. **Templates** for **Projects** are located at *D:\BusinessServer\Templates\Projects\* folder.


### Saving and printing job (shown on client job example)

To print or save **Client Job** as an RTF document, first apply changes made to this client job by clicking **Apply** button. Once the client job has been saved in database, RTF template controls for it will become active.



The screenshot shows the 'Edit Client Job' window in 'Protected mode, 13:00 left'. The client is 'Internet Unified Corp.' with code 'J-IUC0006'. The project is '0042, Knowledgebase localization' and the client account is 'Main'. The client PM is 'Ernest Dominquez'. The job name is 'Knowledgebase localization proofreading', in the 'Editing' group, 'Proofreading' service, with a volume of 0 words and a price of 0,00 per unit. The client currency is EUR. The project folder is 'D:\Business\Projects\0042 William McSun Knowledgebase localization'. The timeline shows the job assigned on 11.06.2011 09:00 (67 days ago), with a deadline of 05.07.2011 18:00 (43 days ago), and is now completed on 05.07.2011 18:00 (43 days ago). The optional status is 'Normal'. At the bottom, the 'RTF Templates' dropdown is set to 'Client Job - Template - English.rtf', and the 'Save', 'Save&Open', and 'Print' buttons are highlighted with a blue circle.

Use **RTF Templates** drop-down list to select the template which must be used for printing or saving this client job in a file. Click **Save**, **Save & Open** or **Print** button to save or print **Client Job**.

 **Note:** You can choose to save the output file in *RTF*, *DOC* or *PDF* format by selecting this format in **Save As** window with the help of **Save as type** drop-down list.

To edit templates for jobs, on the **Settings** menu click **Current user** and select **Templates**.

**Templates** for Client Jobs are located at *D:\BusinessServer\Templates\CLIENTS\Jobs\* folder.

## Managing Invoices

### Creating Invoices

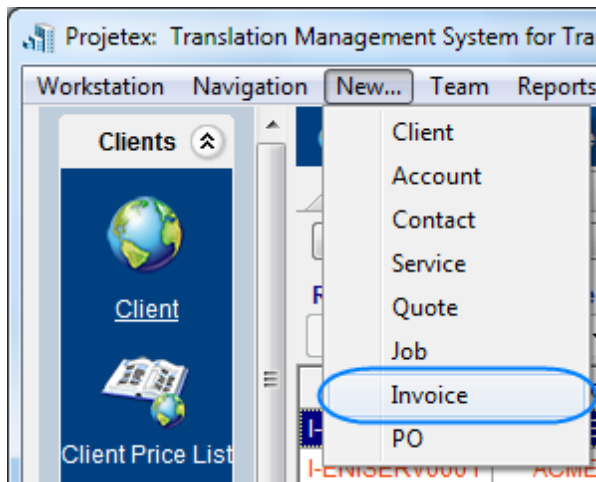
Invoices can be created on **Invoices** tab of **Client** window.

To create an invoice to client,

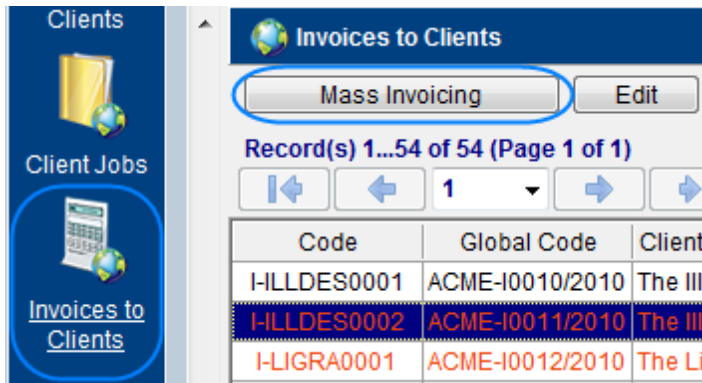
1. Open **Main** tab of **Client** window.
2. Select a client.
3. Switch to **Invoices** tab.
4. Click **New** button.



Alternatively, on **New...** menu click **Invoice** command. This will start **New Invoice Wizard**.



Invoices can also be created by clicking the **Mass Invoices** button on the **Invoices to Clients** window.



## New/Edit Invoice Window

**New/Edit Invoice** window contains the following data:

**Approved** — by approving the invoice, project manager users prevent changing of client job data of the jobs added to this invoice. Select approved checkbox to lock all the client jobs, which have been added to this invoice.

**Date Sent** — this date is considered invoice issue date (no matter when the invoice has actually been created). Payment terms of client may refer to this date when determining *paid* status of the invoice.

**Code** — also called "*client-specific*" code, generated automatically. "I" character means that this is an invoice, letters afterwards represent code of the client and the number is the value of invoice counter for this client. Each client has independent counter for this code.


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

**Attention** — select one of the client's contact persons in this field. Name of the selected contact person will be displayed in the resulting invoice document.

**Client Jobs** — lists client jobs ("items") of this invoice. Right-click this table and click **Customize columns** to configure which data should be displayed.

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

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


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

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 *invoice*.

Note that this button does not change general exchange rate stored in your [Projex](#) database. To [change exchange rate](#) for all future invoices, go to Exchange Rates tab of the Corporate Settings.

**Adjustments** — adjustments added to invoice totals. Discounts and taxes are not applied to adjustments.

**Payment Method** — you can add payment details (banking, credit card number, PayPal account and so on) to your invoice with the help of **Payment Method** tab. To configure available payment methods, on the **Settings** menu click **Corporate** and select **Payment Methods** section.

 **Note:** After some payment method has been selected for an invoice of some client, this payment method will be remembered and applied as the default for the appropriate client. All next invoices will include this payment method. The default payment method can be changed in any time, choosing another value during an invoice creation.

**Linked with Payments** — unless the full amount of invoice is linked with payments, the status of this invoice will remain outstanding. On this tab you can check whether this invoice has been linked with payments. Payments can be linked to invoices from **Edit Payment** window only.

Also on **Linked with Payments** tab phantom payments can be created. Phantom payments are not being added to actual balance, yet they can make an "outstanding" invoice "settled".

**Example:**

Invoice total is 1000EUR, and invoice is linked with payment of 997EUR (suppose your client did not account for banking fees). When you click **Add Phantom Payment** you will be suggested to create a phantom payment of 3EUR. After the payment has been created, invoice will be automatically labeled as "settled".


**Notes** — any additional notes which your invoice must include, can be added on this tab. These notes can be automatically added to printed invoice.

**Custom Fields** - custom information can be entered or selected in proper custom fields on this tab. Custom database fields can be added in [Projex Server Administrator](#).

## Saving and Printing Invoices

To print or save **Invoice** as an RTF document, first apply changes made to this invoice by clicking **Apply** button. Once the invoice has been saved in database, RTF template controls for it will become active.

Use **RTF Templates** drop-down list to select the template which must be used for printing or saving this invoice in an RTF file. Click **Save**, **Save & Open** or **Print** button to save or print **Invoice**.

 **Note:** You can choose to save the output file in *RTF*, *DOC* or *PDF* format by selecting this format in **Save As** window with the help of **Save as type** drop-down list.

To edit templates for invoices, on the **Settings** menu click **Current user** command and select **Templates**. Templates for invoices are located at *C:\Program Files\AIT\Projetex 9\Projetex Workstation\Templates\CLIENTS\Invoices\* folder.

## Void Invoices

By voiding an invoice, you do not delete it from your invoices list. However once voided, invoice cannot be printed or edited, and the jobs added to this invoice revert to *Uninvoiced* status.

To void invoice, open **Invoices Tab** of **Client Window**, select an invoice and click **Void** button.

When voiding an invoice you can enter a reason for voiding, and specify a date (will be used by **Global Date Filter**).

Details of void invoice are kept in database in the form of plain text note for future reference. The following data will be preserved in void invoice:

- **Client Jobs:** Code, Client Ref., PO Number, Name, Assigned, Deadline, Completed, Price, Volume, Exchange Rate: Total

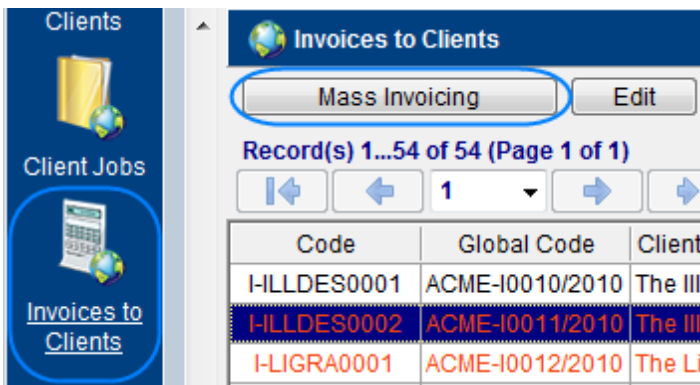
- **Discounts:** name, percentage, and volume
- **Taxes:** name, percentage, and volume

Invoice cannot be voided if it has linked payments. Void invoices are displayed in all invoice lists.

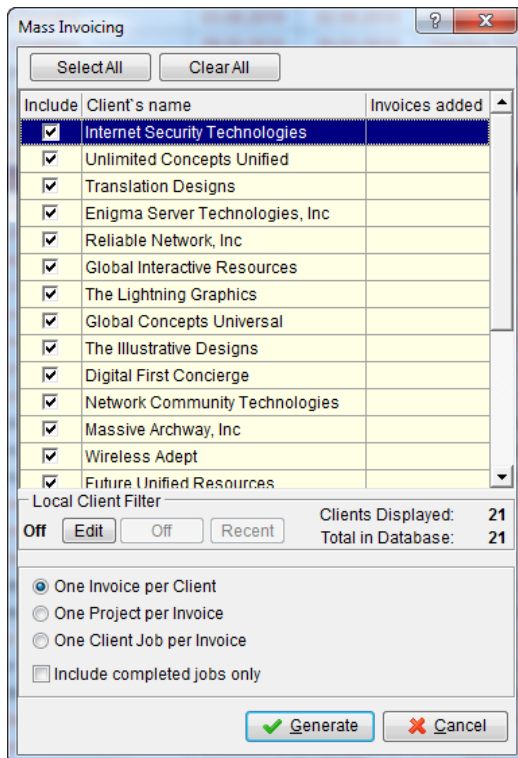
## Mass invoicing

Mass invoicing can be done from **Invoices to Clients** window. It allows to quickly invoice all or certain client jobs stored in database.

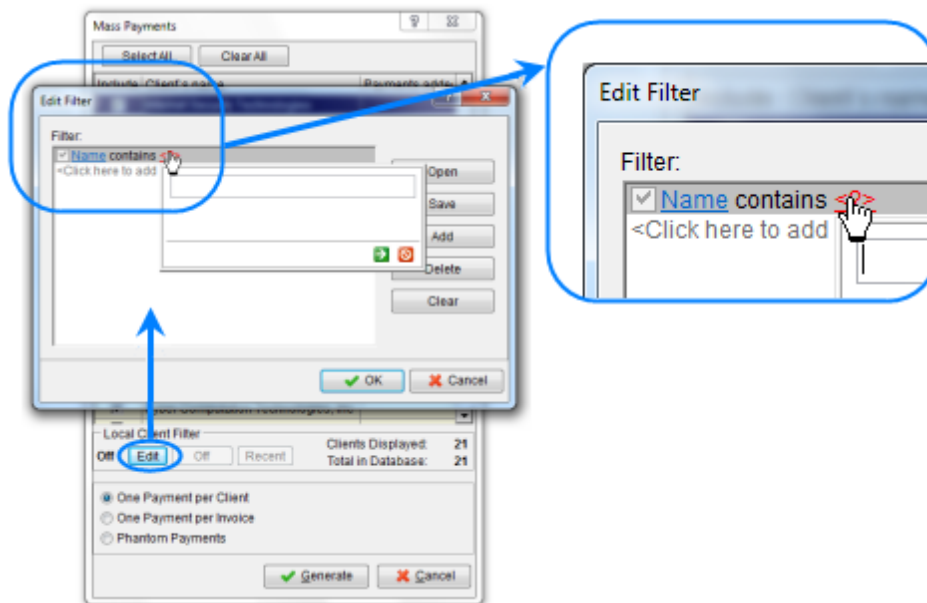
1. To begin invoicing procedure, open **Invoices to Clients** window and click **Mass Invoicing** button (shortcut Alt+M).



2. This will open **Mass Invoicing** window.



- Select the clients whose jobs you wish to invoice by double-clicking check box in front of this client.
  - Select one of the invoicing methods:
    - **one Invoice per Client** (all uninvoiced client jobs of each client will be included into one invoice);
    - **one Project per Invoice** (all uninvoiced client jobs of particular project will be included into one invoice);
    - **one Client Job per Invoice.**
3. You can filter the clients displayed in the list by adjusting **Local Client Filter**. To do so, click **Edit** button.



4. After selecting the required clients and setting up **Mass Invoicing** options, click **Generate** button. The program will start to create invoices, which will be indicated by a **progress bar**.
6. Once all specified invoices have been generated, **Mass Invoicing** window will display the number of invoices generated opposite each client.

**Note:** Once the invoices have been generated, they can be opened and edited in **Invoices to Clients** window or on **Invoices tab** of **Client** window.

**Note:** To quickly select multiple clients by certain criteria, first apply **Local Client Filter**, and then, once the list contains only clients you need — click **Select All** button.

**Note:** If you need to invoice one or just several clients, you can click **Clear All** button to deselect all list.




## Managing Global Codes

Global codes of invoices and purchase orders can be managed in **Codes** area on **Corporate Settings** tab of *Projetex Workstation Administrator*.

### Setting Next Codes


Click **Next Codes** button to set the global code which will be assigned to the:

- next *Project*;
- next *Invoice* issued to a client;
- next *PO* issued to a freelancer.

 **Note:** Next code cannot be less than last code of this type in the database. Thus if you already have project with code 10, next project code cannot be set 10 or less (even if some projects with codes 1-9 have been deleted).

### Editing Global Invoice Code display format

Also you can customize the prefix and suffix of global invoice and purchase order codes, and enable annual numbering resets. Regulations in some countries may require resetting invoice counters each year.

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

### Codes in naming RTF files

**Codes in naming of .RTF files** options determine what code will be used when automatically generating file names for POs and invoices (it can be **Client/Expert-Specific** or **Global**).

## Managing Purchase Orders

### 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.

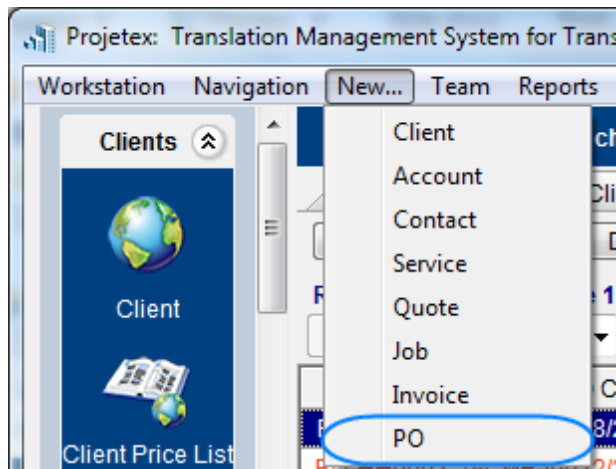
To create a purchase order:

1. Open **Main** tab of **Project** window.
2. Click required project.
3. Click **POs** tab.

4. Click **New** button.

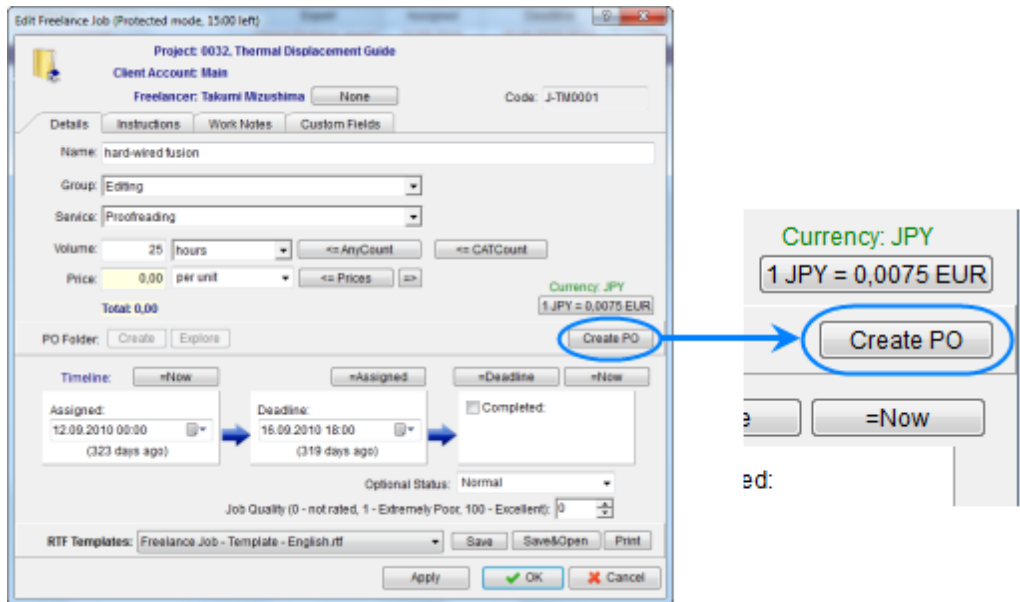


Alternatively, on the **New...** menu click **PO** command. This will start **New Invoice Wizard**.




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 to purchase 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;
- **Schedule** tab of **Project** window (double-click job schedule to edit that job);
- **Schedule** tab of **Freelancer** window (double-click job schedule to edit that job);
- **Freelance Jobs** window;
- **Schedule of Freelance Jobs** window (double-click job schedule to edit the job).

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

## New/Edit PO 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 **Projex 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 **Settings** menu click **Corporate** 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 **Settings** menu click **Corporate** and select **Taxes** section.

 **Note:** After some 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.

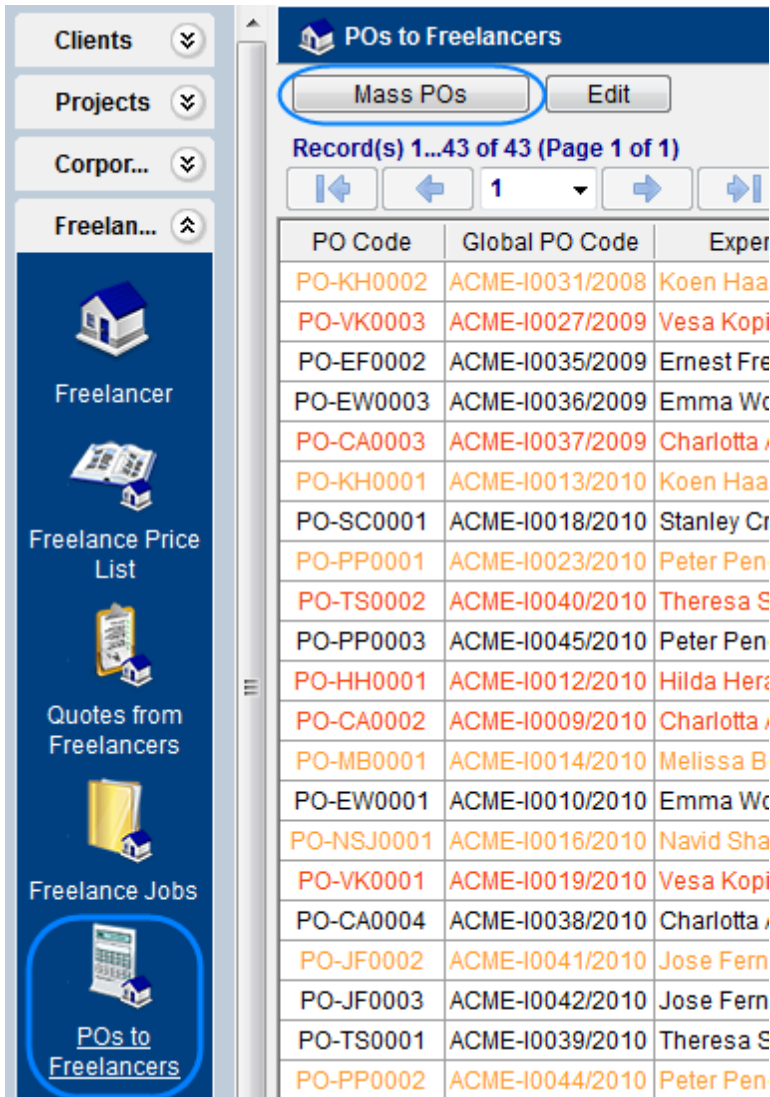
**Custom Fields** - custom information can be entered or selected in proper custom fields on this tab. Custom database fields can be added in [Projetex Server Administrator](#).

**PO folder** — folder of purchase order can be created only after the PO has been added to database. Click **Apply** button to enable PO folders options.

## Mass purchase orders

Use **Mass POs** feature to quickly issue purchase orders for a number of freelance jobs.

1. Open **POs to Freelancers** window and click **Mass POs** button (shortcut **Alt+M**).



2. This will open **Mass POs** window:

Include	Expert Name	POs added
<input checked="" type="checkbox"/>	Hilda Herald	
<input checked="" type="checkbox"/>	Ernest Fredrickson	
<input checked="" type="checkbox"/>	Vesa Kopitello	
<input checked="" type="checkbox"/>	Navid Shahriar Javaid	
<input checked="" type="checkbox"/>	Theresa Suarez	
<input checked="" type="checkbox"/>	Emma Woodward	
<input checked="" type="checkbox"/>	Kirsi Nurmi	
<input checked="" type="checkbox"/>	Pamela Lafontaine	
<input checked="" type="checkbox"/>	Charlotta Adamssen	
<input checked="" type="checkbox"/>	Thomas Geelen	
<input checked="" type="checkbox"/>	Takumi Mizushima	
<input checked="" type="checkbox"/>	Jose Fernandez	
<input checked="" type="checkbox"/>	Melissa Beaumont	
<input checked="" type="checkbox"/>	Peter Pendleton	
<input checked="" type="checkbox"/>	Stanley Crayton	
<input checked="" type="checkbox"/>	Koen Haanrath	

Local Freelancer Filter

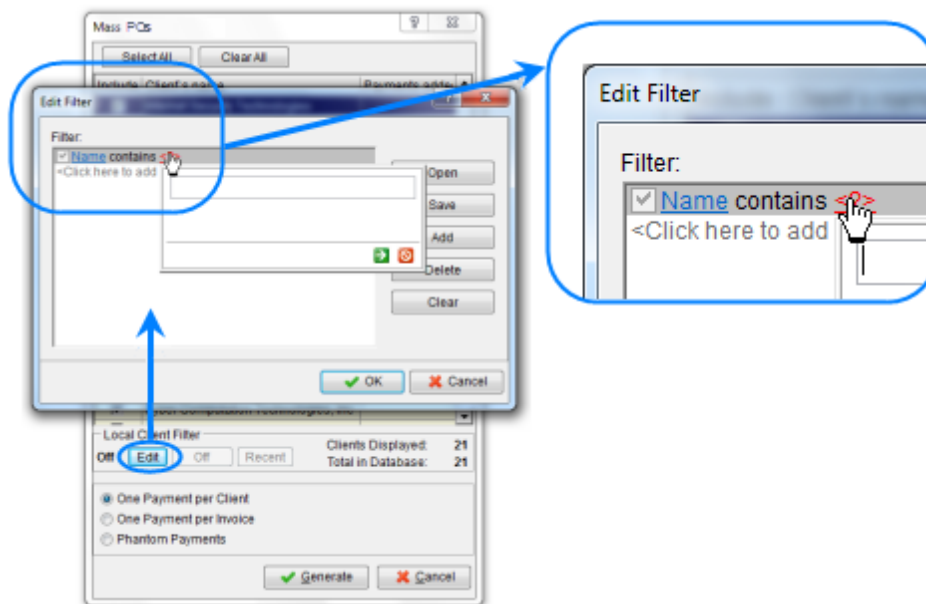
Off Edit Off Recent Freelancers Displayed: 16  
Total in Database: 16

One Project per PO  
 One Freelance Job per PO  
 Include completed jobs only

Generate Cancel

- Select the freelance experts for which POs should be created. Do so by double-clicking check boxes in front of each expert
- Select PO issuing options:
  - **One Project per PO** (one PO to freelancer, including all the freelance jobs of this freelancer from all the projects);
  - **One Freelance Job per PO** (create separate PO for each freelance job).

3. You can filter the freelancers displayed in the list by adjusting **Local Freelancer Filter**. To do so click **Edit** button.



4. After selecting the required freelancers and setting up mass PO options, click **Generate** button. The program will start to create purchase orders, which will be indicated by a progress bar.

5. Once all specified POs have been generated, **Mass PO** window will display the number of generated purchase orders opposite to each freelancer.

**Note:** Once the POs have been generated, they can be opened and edited in **POs to Freelancers** window or on **POs** tab of **Freelancer** window.

**Note:** To quickly select multiple freelancers by certain criteria, first apply **Local Freelancer Filter**, and then, once the list contains only freelancers you need — click **Select All** button.

**Note:** If you need to invoice one or several freelancers, you can click **Clear All** button to deselect all list.

## Saving and Printing Purchase Orders

To print or save **Purchase Order** as a text document, first apply changes made to this PO by clicking **Apply** button. Once the purchase order has been saved in database, RTF template controls for it will become active.

From: Advanced International Translations ©  
 To: Vesa Kopitello  
 Project: 0020, "New challenges in virtual world" article  
 Date Sent: 28.05.2010  
 Code: PO-VK0001  
 Global Code: ACME-I0019/2010  
 Project Manager: William McSun

Approved (Jobs Locked)

Freelance Jobs Adjustment Linked with Payments Notes Custom Fields

Add Job to PO Remove Job from PO


Completed	Project Cod	Job Code	Job Name	Group of Services
- No -	0020	J-VK0001	"New challenges in	Translation

Discount/Markup 1: None (0,00%) 0,00  
 Discount/Markup 2: None (0,00%) 0,00  
 Net Jobs Total: 50,00  
 Tax 1: None (0,00%) 0,00  
 Tax 2: None (0,00%) 0,00  
 Currency: EUR  
 PO Total: 50,00  
 Paid: 0,00  
 Balance Due: 50,00  
 Expert Invoice received  
 Invoice Code:   
 Invoice Date: - None -

RTF Templates: Purchase Order to Freelancer - Template - English\_2.rtf Save Save&Open Print

Apply OK Cancel

Use **RTF Templates** drop-down list to select the template which must be used for printing or saving this PO in a file. Click **Save**, **Save&Open** or **Print** button to save or print **Invoice**.

 **Note:** You can save the output file in *RTF*, *DOC* or *PDF* format by selecting this format in **Save As** window with the help of **Save as type** drop-down list.

To edit templates for purchase orders, on the **Settings** menu click **Current user** and then click **Templates**. **Templates** for purchase orders are located at *D:\BusinessServer\Templates\EXPERTS\FREELANCE\POs* folder.

## Managing Job Assignments

### 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:

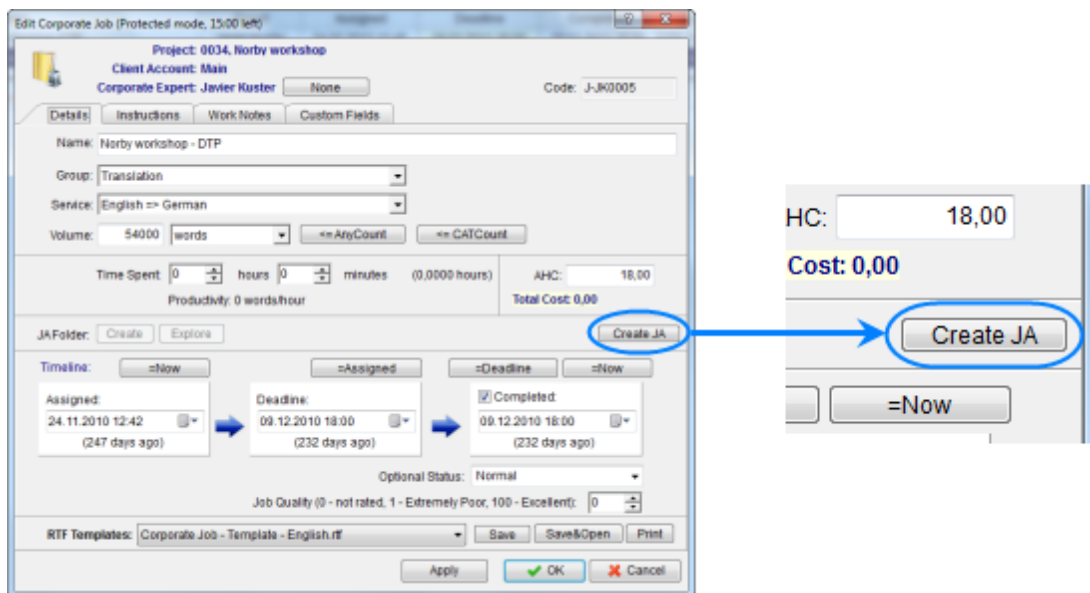
1. Open **Main** tab of **Project** window.
2. Click required project.
3. Click **JAs** tab.
4. Click **New** button.





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

**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.

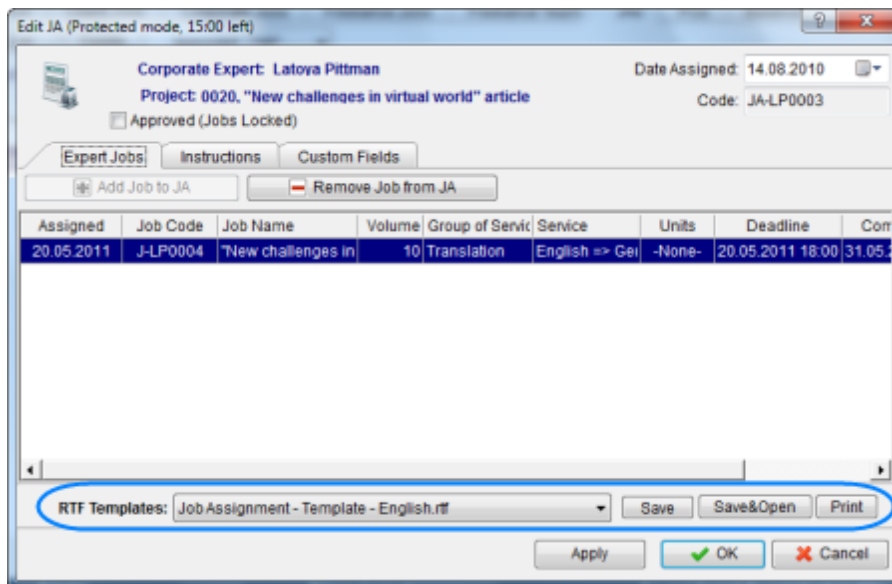
**Instructions** — any additional instructions which your JA must include, can be added on this tab

**JA folders** — folder of job assignment can be created only after the JA has been added to database. Click **Apply** button to enable JA folders options.


**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](#).

## Saving and Printing Job Assignments

To print or save a job assignment in a printable file or print it with the help of *RTF templates*, first apply changes made to this JA by clicking **Apply** button. Once the job assignment has been saved in database, RTF template controls for it will become active.



Use **RTF Templates** drop-down list to select the template which must be used for printing or saving this job assignment in a file. Click **Save**, **Save&Open** or **Print** button to save or print this JA.

 **Note:** You can choose to save the output file in *RTF*, *DOC* or *PDF* format by selecting this format in **Save As** window with the help of **Save as type** drop-down list.

To edit templates for printing job assignments, on the **Settings** menu click **Current User**. Click **Templates** section to quickly access all template folders. Templates for printing client jobs are saved in *D:\BusinessServer\Templates\EXPERTS\CORPORATEJAs* folder.

## Managing Payments

### New/Edit Payment Window

**New/Edit Payment** window contains the following data:

**Date Received** — except for accountant's reference this date will also be used by **Global Date** filter.

**Code** — payment code is generated automatically. In this code "P" character means that this is a payment, letters afterwards represent code of the client (or freelancer), and the number is the value of payments counter for this client/freelancer. Each client and freelancer has independent code counter for payments.

**Value** — total amount of payment in client's or freelancer's currency. **Projetex** will calculate your revenues in your base currency according to exchange rates.

If client or freelance 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 *payment*. Note that this button does not change general exchange rate stored in your **Projetex** database. To [change exchange rate](#) for all future payments, go to Exchange Rates tab of the Corporate Settings.

**Notes** — any additional notes by accounting or other staff. For example if this is an advance payment for future project.

**Linked with Invoices (Linked with POs)** — payment value can be linked with invoices or purchase orders — fully or partially. The table on **Linked with Invoices (Linked with POs)** tab indicates which amount is linked to which invoice or purchase order.

**Phantom invoices** and **phantom POs** mean to make the payment linked, without settling any of the actual invoices or purchase orders. Phantom invoices can be used for ensuring account consistency in case the payment for some reason should not be used to cover invoices or purchase orders.

### Linking Payment with Invoices or POs

Any invoice and PO in **Projetex** will be always shown as outstanding unless it is linked with proper payment, that completely covers this invoice or PO amount.

#### Linking payment with an invoice

To create link between payment and invoice:

- Open **Payment** record for editing
- Enter *payment value* (if not yet entered) and switch to Linked with tab
- Click **New link** button and select invoice to create link with
- Click **OK** twice to complete linking

#### Linking payment with PO

To create link between payment and PO:

- Open **Payment** record for editing
- Enter *payment value* (if not yet entered) and switch to Linked with tab
- Click **New link** button and select PO to create link with
- Click **OK** twice to complete linking

## Mass Payments from Clients

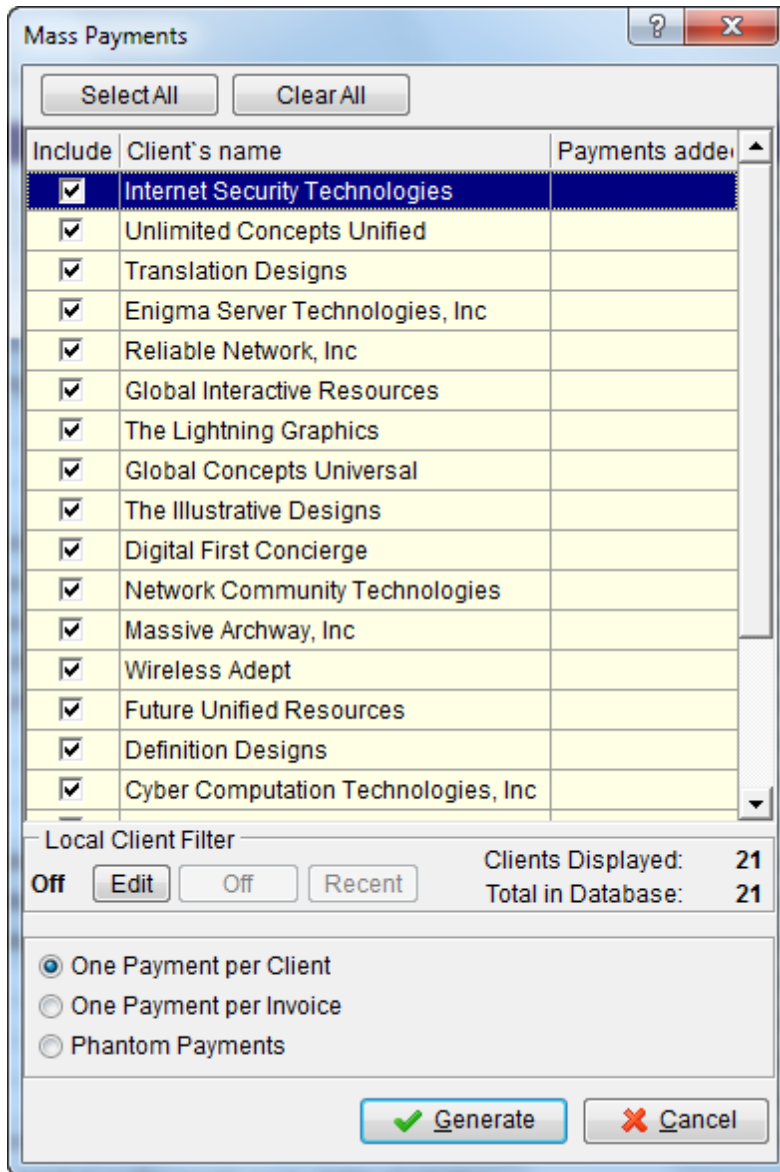
Multiple payments from clients can be created according to existing invoices and linked with them.

1. To open **Mass Payments** window, open **Payments from Clients** window and then click **Mass Payments** button (shortcut Alt+M).

The screenshot shows the 'Payments from Clients' window. On the left is a navigation pane with icons for Client, Client Price List, Quotes to Clients, Client Jobs, Invoices to Clients, and Payments from Clients (which is highlighted with a blue circle). The main window has a title bar 'Payments from Clients' and a 'Mass Payments' button (also highlighted with a blue circle) next to an 'Edit' button. Below the buttons, it says 'Record(s) 1...64 of 64 (Page 1 of 1)' and shows navigation arrows and a page number '1'. A table with two columns, 'Code' and 'Client', lists 20 payment records.

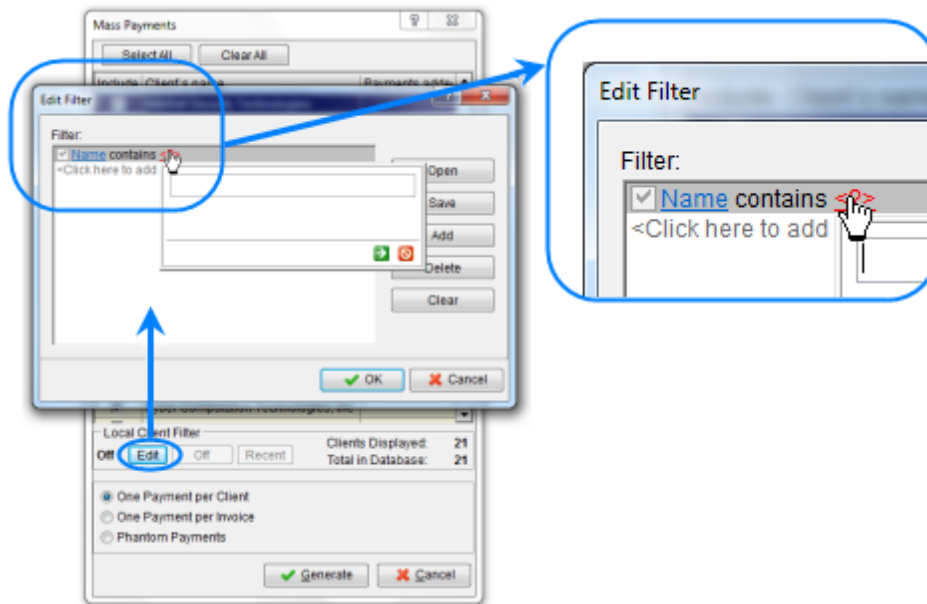
Code	Client
P-ILLDES0001	The Illustrative Design
P-ILLDES0002	The Illustrative Design
P-LIGRA0001	The Lightning Graphic
P-DFC0001	Digital First Concierge
P-LIGRA0002	The Lightning Graphic
P-INTSEC0001	Internet Security Tech
P-ENISERV0001	Enigma Server Techn
P-DEFDES0001	Definition Designs
P-WIREAD0001	Wireless Adept
P-WIREAD0002	Wireless Adept
P-INTSEC0002	Internet Security Tech
P-FUTUN0001	Future Unified Resou
P-FUTUN0002	Future Unified Resou
P-NETCOM0001	Network Community 1
P-NETCOM0002	Network Community 1
P-IUC0001	Internet Unified Corp.
P-IUC0002	Internet Unified Corp.
P-IUC0003	Internet Unified Corp.
P-UNLICON0001	Unlimited Concepts L

2. This will open **Mass Payments** window:



- Select the clients, whose invoices you wish to mark as paid, by double-clicking check box in front of this client.
- Select one of the available payment
  - **One Payment per Client** (one payment from Client, covering the whole due amount of outstanding invoices);
  - **One Payment per Invoice** (separate payments, covering due amount of each outstanding invoice).
  - **Phantom Payments** (phantom payments will be created to over unpaid balance of invoices of selected clients).

3. You can filter the clients displayed in the list by adjusting **Local Client Filter**. To do so click **Edit** button.



4. After selecting the required clients and setting up mass payment options, click **Generate** button. The program will start to create payments, which will be indicated by a progress bar.

5. Once all specified payments have been generated, **Mass Payments** window will display the number of new payments per each freelancer.

**Note:** Once the payments have been generated, they can be opened and edited in **Payments from Clients** window or **Payments** tab of **Client** window.

**Note:** To quickly select multiple clients by certain criteria, first apply **Local Client Filter**, and then, once the list contains only clients you need — click **Select All** button.

**Note:** If you need to create payments for one or several clients, you can click **Clear All** button to deselect all list.

## Mass Payments to Freelancers

Multiple payments to freelancers can be created in the same way as multiple payments from clients.


1. To open **Mass Payments** window, open **Payments to Freelancers** window first, and then click **Mass Payments** button (shortcut Alt+M).


Clients ▾


Projects ▾


Corpor... ▾


Freelan... ⤴


  
 Freelancer


  
 Freelance Price List

  
 Quotes from Freelancers

  
 Freelance Jobs

  
 POs to Freelancers

  
 Payments to Freelancers

 **Payments to Freelancers**

Mass Payments

Edit

Record(s) 1...32 of 32 (Page 1 of 1)

⏪

⏩

1

⏴

⏵

Payment Code	Payment Date	E
P-CA0001	10.04.2008	C
P-CA0002	30.03.2008	C
P-EW0001	16.08.2010	E
P-EW0002	01.12.2009	E
P-EF0001	22.10.2010	E
P-EF0002	16.04.2008	E
P-HH0001	14.09.2010	H
P-HH0002	14.09.2010	H
P-JF0001	29.08.2010	Jc
P-JF0002	16.06.2010	Jc
P-KN0001	12.08.2010	K
P-KN0002	16.04.2008	K
P-KH0001	22.02.2010	K
P-KH0002	29.07.2010	K
P-MB0001	04.10.2010	M
P-MB0002	03.10.2010	M
P-NSJ0001	16.04.2008	N
P-NSJ0002	16.08.2010	N
P-PL0001	27.08.2010	P
P-PL0002	30.08.2010	P
P-PP0001	30.07.2010	P
P-PP0002	24.03.2010	P
P-SC0001	28.02.2010	S
P-SC0002	12.10.2010	S
P-TM0001	01.09.2010	T

2. This will open **Mass Payments** window:

Select	Expert Name	Payments added
<input checked="" type="checkbox"/>	Hilda Herald	
<input checked="" type="checkbox"/>	Ernest Fredrickson	
<input checked="" type="checkbox"/>	Vesa Kopitello	
<input checked="" type="checkbox"/>	Navid Shahriar Javaid	
<input checked="" type="checkbox"/>	Theresa Suarez	
<input checked="" type="checkbox"/>	Emma Woodward	
<input checked="" type="checkbox"/>	Kirsi Nurmi	
<input checked="" type="checkbox"/>	Pamela Lafontaine	
<input checked="" type="checkbox"/>	Charlotta Adamssen	
<input checked="" type="checkbox"/>	Thomas Geelen	
<input checked="" type="checkbox"/>	Takumi Mizushima	
<input checked="" type="checkbox"/>	Jose Fernandez	
<input checked="" type="checkbox"/>	Melissa Beaumont	
<input checked="" type="checkbox"/>	Peter Pendleton	
<input checked="" type="checkbox"/>	Stanley Crayton	
<input checked="" type="checkbox"/>	Koen Haanrath	

Local Freelancer Filter  
 Off Edit Off Recent Freelancers Displayed: 16  
 Total in Database: 16

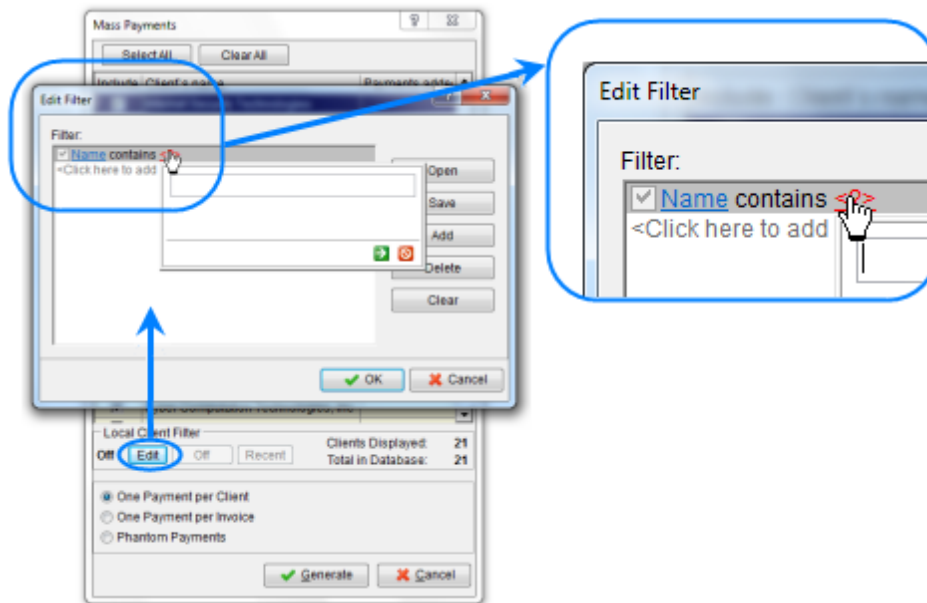
One Payment per Freelancer  
 One Payment per Project  
 One Payment per PO  
 Phantom Payments

Generate Cancel

- Select the experts whose POs need to be paid by double-clicking check boxes in front of required experts.
- Select one of the available payment options to freelancers.
  - **One Payment per Freelancer** (one payment to each Freelancer, covering the whole due amount of outstanding POs);
  - **One Payment per Project** (separate payment, covering total amount of POs, issued to each Freelancer within certain Project).



- **One Payment per PO** (separate payments, covering total amount each PO).
  - **Phantom Payments** (generate phantom payments for total unpaid amount of each PO).
3. You can filter the freelancers displayed in the list by adjusting **Local Freelancer Filter**. To do so click **Edit** button.



4. After selecting the required freelancers and setting up mass payment options, click **Generate** button. The program will start to create payments, which will be indicated by a progress bar.

5. Once all specified payments have been generated, **Mass Payments** window will display the number of generated payments opposite to each freelancer.

**Note:** Once the payments have been generated, they can be opened and edited in **Payments to Freelancers** window or **Payments** tab of **Freelancer** window.


**Note:** To quickly select multiple freelancers by certain criteria, first apply **Local Freelancer Filter**, and then, once the list contains only freelancers you need — click **Select All** button.

**Note:** If you need to create payments for one or several freelancers, you can click **Clear All** button do deselect all list.

## Saving And Printing Payments

To print or save **Payment** as a text document, first apply changes made to this payment by clicking **Apply** button. Once the payment has been saved in database, RTF template controls for it will become active.

Use **RTF Templates** drop-down list to select the template which should be used for printing or saving this payment as a file. Click **Save**, **Save&Open** or **Print** button to save or print **Invoice**.

 **Note:** You can choose to save the output file in *RTF*, *DOC* or *PDF* format by selecting this format in **Save As** window with the help of **Save as type** drop-down list.

To edit templates for payments, on the **Settings** menu click **Current user** and select **Templates**. **Templates** for payments are located at the following folders:

- *D:\BusinessServer\Templates\CLIENTS\Payments\* folder for client payments.
- *D:\BusinessServer\Templates\EXPERTS\FREELANCE\Payments\* folder for payments to freelancers.

## Import

### Importing Database

Client and freelancer data can be imported to **Projex** with the help of **Projex Import Utility**.

**Projex Import Utility** is included in **Projex** setup.

**Projex Import Utility** can be used to:

- Import *client* information and prices.
- Import *freelancer* information and prices.

**Projex Import Utility** supports data import from the following file formats:

- *XLS* (Microsoft Excel);

- *DBF* (dBase 5, dBase III, dBase IV);
- *TXT* (Text);
- *CSV* (Comma Separated Values);
- *XML* (Data Packet V.2.0).

### Data import procedure

Before you begin importing data, switch to offline [Projetex](#) database and launch [Projetex Import Utility](#). One way to do so is to run the following executable:

```
C:\Program Files\AIT\Projetex 9\Projetex Server\Import\Projetex7\Import.exe
```

Alternatively, use Windows **Start** menu to run [Projetex Import Utility](#) on server PC.

## 1. Preparing to import

Select the *type of information* you want to import: *client information* or *freelancer information*.

Select the *format of source data file* you are going to import.

Specify *path to the source file* you are going to import data from.

## 2. Target fields in Projetex database

Target fields are the fields in [Projetex](#) database where you are importing data. For example, *Client name* is a target field. Below are some basic recommendations on how to prepare fields for importing. The import procedure itself is described in step 3.

1. If possible, split up the data according to the fields available. Information from one source file field must correspond to one field in [Projetex](#) database.

### Example:

If you have all the address information (country of residence, primary address, secondary address, and so on) stored in one field or column of the source file, split this data into several columns: *country*, *address1*, *address2*. If there are no appropriate fields for some piece of information, you can add the necessary fields manually: shut down the utility first and then add all necessary fields with the help of Custom Fields section of [Projetex Server Administrator](#).

2. The newly created custom fields should appear at the end of the **Target Fields in Projetex Database** list. If the fields do not appear, please check whether they were created correctly using [Projetex Server Administrator](#).

Price Group, Price Service, Price Unit and Price Value fields were added to enable importing clients/freelancers prices. Price Value cannot have negative value. Only one column should correspond to Price Service field.

**Example:**

If its value is a language pair, like “*English => French*”, the string should be a single whole, not “*English*” in one column and “*French*” in another column. *Price Group* field is not mandatory, as its value is set “*Translation*” automatically, if other is not specified.

3. Clients can have more than one price (more than one service in other words). In this case, add additional line per each of the prices.

**Example:**

Supposing you need to import information about a client, which has two prices: *English => French* price and *English => Japanese* price. To import these prices under the same client, you need to duplicate the information about this client a number of times equal to the number of price records (services):

Client	...	Language Pair	Units	Price
Alter Ego Solutions	...	English => French	words	0.01
Alter Ego Solutions	...	English => Japanese	words	0.12

To avoid creating two “*Alter Ego Solutions*” client records in *Projetex* database, set **Import Mode** to **Import New** and specify the list of fields, by which it can be determined that current client has been already imported and only price data should be imported now.

### 3. Linking source document to target fields

Import Utility will import data from certain area of your *source document* to certain field in *Projetex* database. Thus, the most important importing step is linking data in your document to certain field in the database. Linking procedure may vary, depending on the source document type.

### 4. Regional settings: Base Formats

Adjust regional settings on **Base Formats** tab so that *Projetex Import Utility* could recognize separator symbols in dates and numbers, date formats and other regional-specific settings used in the source document:

**Decimal separator** – set a character, which delimits the decimal parts of the numbers in source file.

**Thousand separator** – set a character, which separates the digit groups in the source file numbers.

**Date separator** – set a character, which separates the groups of dates in source file.

**Time separator** – set a character, which separates the groups of time strings in source file.

**Short date, Long date, Short time, Long time** – use these fields to set the date and time formats used in source file.

**Boolean True** – set some variants of TRUE value representation in the source file, e.g. 'Yes' or '+'. Use new line for each new variant.

**Boolean False** – set some variants of FALSE value representation in the source file, e.g. 'No' or '–'. Use new line for each new variant.

**Null Values** – set some variants of null value representation in the source file, e.g. '0' or 'Empty'. Use new line for each new variant.

## 5. Regional settings: Data Formats

You can customize format of each field being imported. Select the field in the field list on the left and set its format using the settings to the right.

**Generator value** – use this edit field to set the initial value of the autoincrement field.

**Generator step** – set the step of the autoincrement field. For instance, if **Generator value** field is set to 2 and **Generator step** field is set to 1, then first imported line will contain "2" in this field, second will contain "3" and so on. If **Generator step** field is set to 0, then the value of the generator will be ignored.

**Constant value** – use this option to set the constant value of the field.

**Null value** – set the value, which **Projetex Import Utility** should read as NULL value.

**Default value** – set the value which will be inserted in the database by **Projetex Import Utility** instead of NULL value.

**Left quote** – set a character or a number of characters, which denote opening quotation marker in the imported string.

**Right quote** – set a character or a number of characters, which denote closing quotation marker in the imported string.

**Quote action** – select Add to add quotation marks to the imported string, Remove to remove all the quotation marks from the imported string, or As Is to save the original quotation marks. **As is** option saves the original string char set.

**Char case** – set the case of the imported string. As Is saves the original string, **Upper** sets the whole string to upper case, **Lower** sets the whole string to lower case, **UpperFirst** sets the first letter of the string to upper case, **UpperFirstWord** sets the first letter of each word to upper case. **As is** option saves the original string char set.

**Char set** – change the character set of the imported string to **ANSI** or **OEM**. **As is** option saves the original string char set.

Use **Replacements** part of the dialog box to set the replacement list for the selected field. Click



button to add an automatic replacement rule. Each rule will replace value entered in **Text to find** field with the one entered in **Replace with** field.

**Example:**

Set the following replacements for the field 'Continent':

**Text to find:** 'South America', **Replace with:** 'S. America'

**Text to find:** 'North America', **Replace with:** 'N. America'

This means, that all the values *'South America'* of the field '*Continent*' will be replaced with values *'S. America'*, and values *'North America'* will be replaced with *'N. America'* respectively.

## 6. Selecting columns to import

**Import Mode** includes the following settings:

- **Insert All:** inserts all the records from the source file to the target object.
- **Insert New:** Inserts records which are not in the target object yet, others are skipped.
- **Update:** Updates those records that already exist in the target object, others are skipped.
- **Update Or Insert:** Updates existing records and inserts new records.

All options except **Insert All**, require specifying the *key fields*, by which **Projetex Import Utility** determines if **Projetex** database contains this record already. Usually client name and country are selected.

Import all records option – check this option to import all records from the source table.

### Importing from .xls

With **Projetex Import Utility** you can import data from your XLS files directly to **Projetex** database.

To link source and target fields:

1. Select the required target field from the **Target Fields in Projetex Database** list. This is the field in **Projetex** database *where* you wish to import data.
2. Click **Add** button.
3. Specify which column or which row to import data from, using **Range Type** settings. This is the field in source file *from* which the data must be imported.

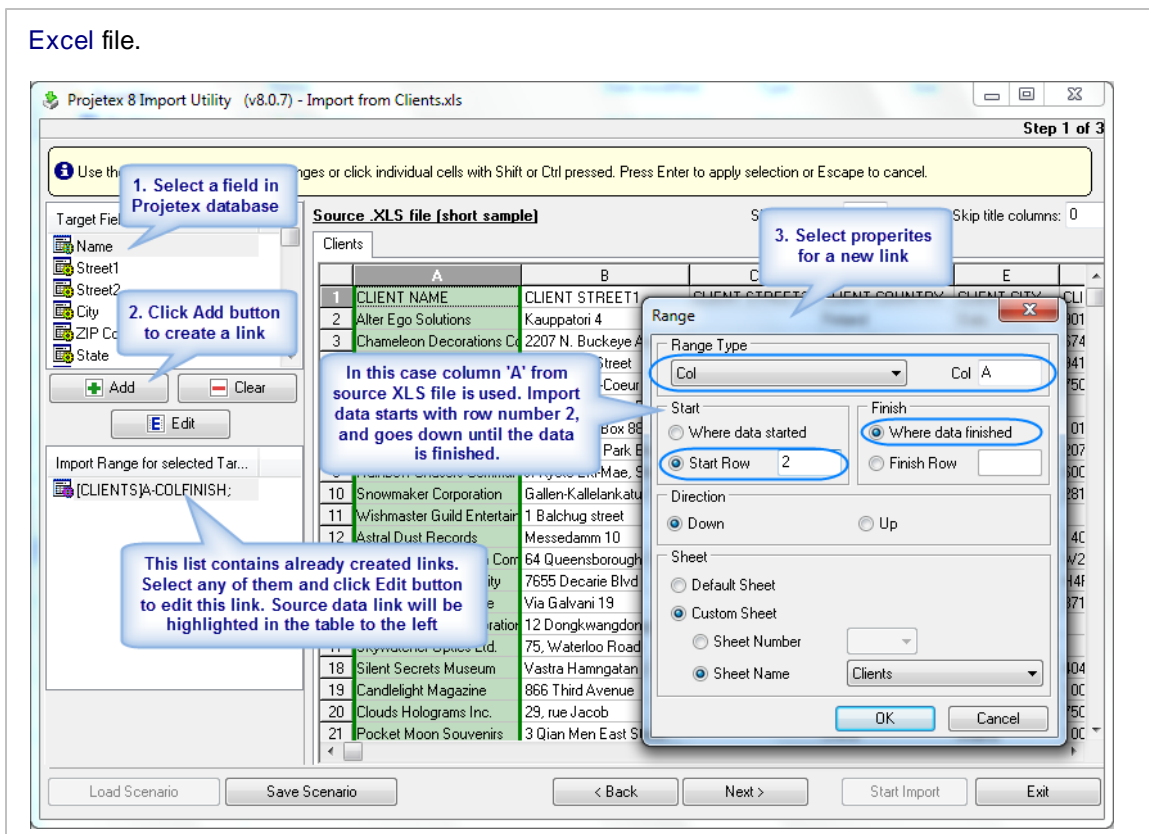
Alternatively, select required source fields by holding **Ctrl** or **Shift** key, and using mouse to select required fields right in the table.

Create links for all the fields you wish to import.

If you do not want some first rows or columns of the source table to be imported, set a starting and finish row or column in **Start** and **Finish** settings correspondingly.

**Example:**

Below the link was established between **Name** field in **Projetex** and column A of **Microsoft**



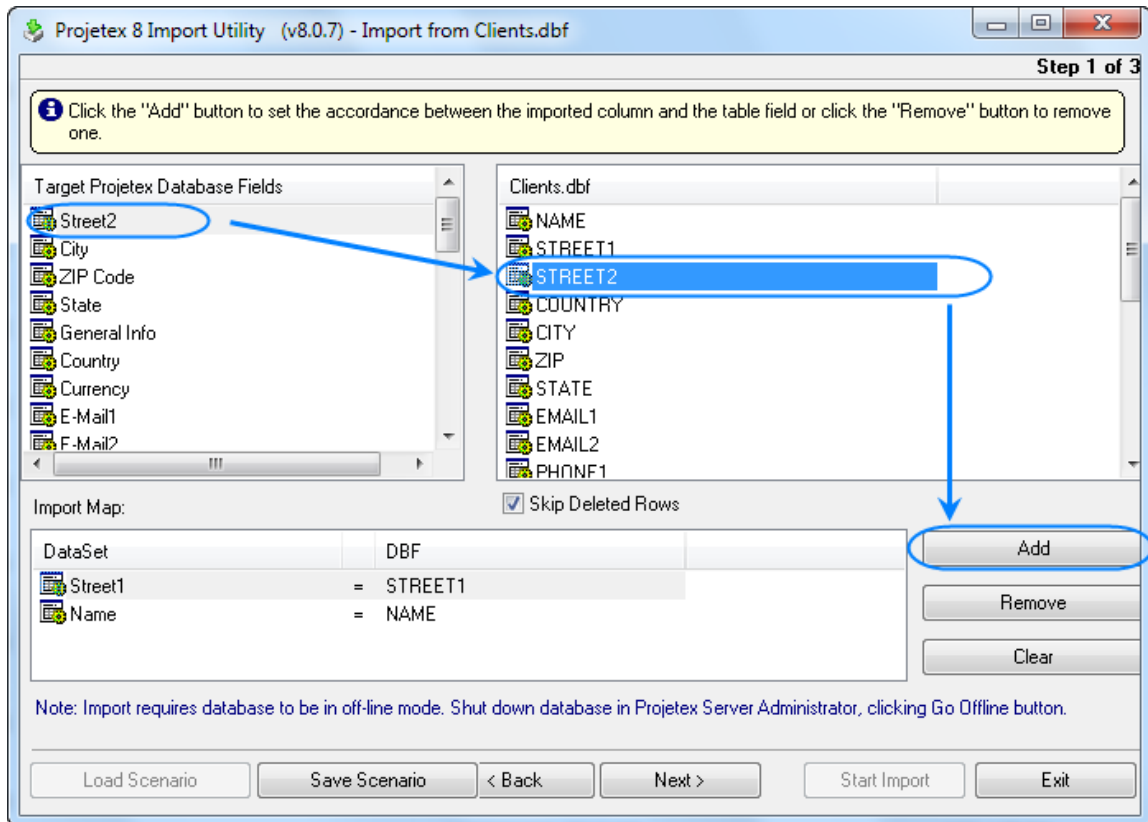
### Importing from .dbf

With Projex Import Utility you can import data from your DBF files directly to Projex database.

To link source and target fields:

1. Select the dataset field from the **Target Projex Database Fields** list. This is the field *where* you wish to import data.
2. Select the corresponding field in the **<TABLE\_NAME> .dbf** list. This is the field in source file *from* which the data must be imported.
3. Click **Add** to create a link. These fields will be added to the list at the bottom of the window.


Repeat these operations for each dataset field. If you want to remove the link, select the linked fields in the bottom list and click **Remove**.



### Importing from .txt

With [Projetex Import Utility](#) you can import data from your TXT files directly to [Projetex](#) database.

1. Select the dataset field from the **Target Fields** drop-down list. This is the field *where* you wish to import data.
2. Set two separator lines to delimit the source table column.

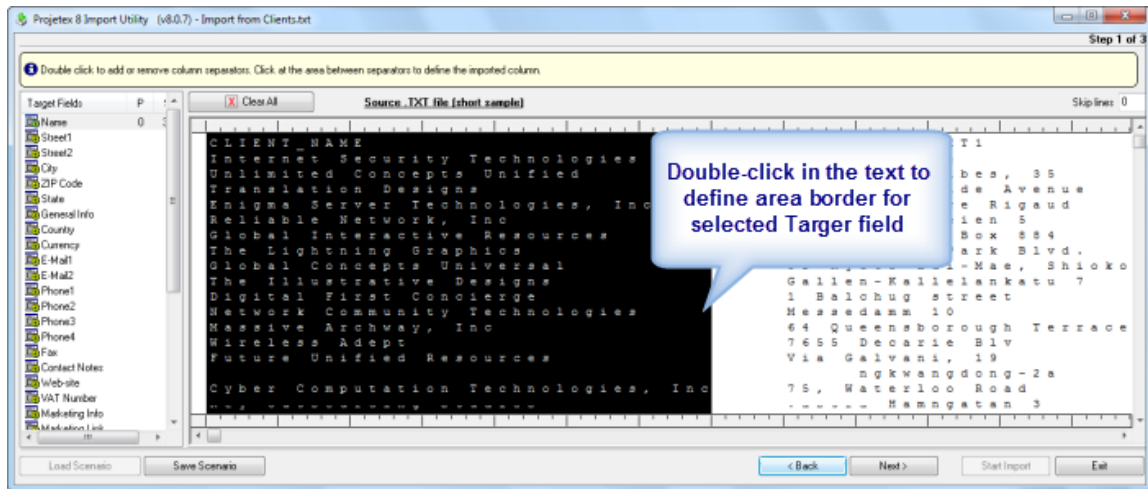
 **Note:** To associate the selected field with a column, the column itself should be enclosed by delimiters (there should be delimiters from both sides).

3. Double-click to add a border or delete one.
4. Drag separators to change the column width.
5. Right-click area between the two borders to select it as source for currently selected target field. This is the field in source file *from* which the data must be imported.

After you have set the separators, proceed to another field and repeat these operations for each dataset field.

If you do not want some first rows of the source table to be imported set the number of such rows in the **Skip ... first line(s)** edit field.





### Importing from .csv

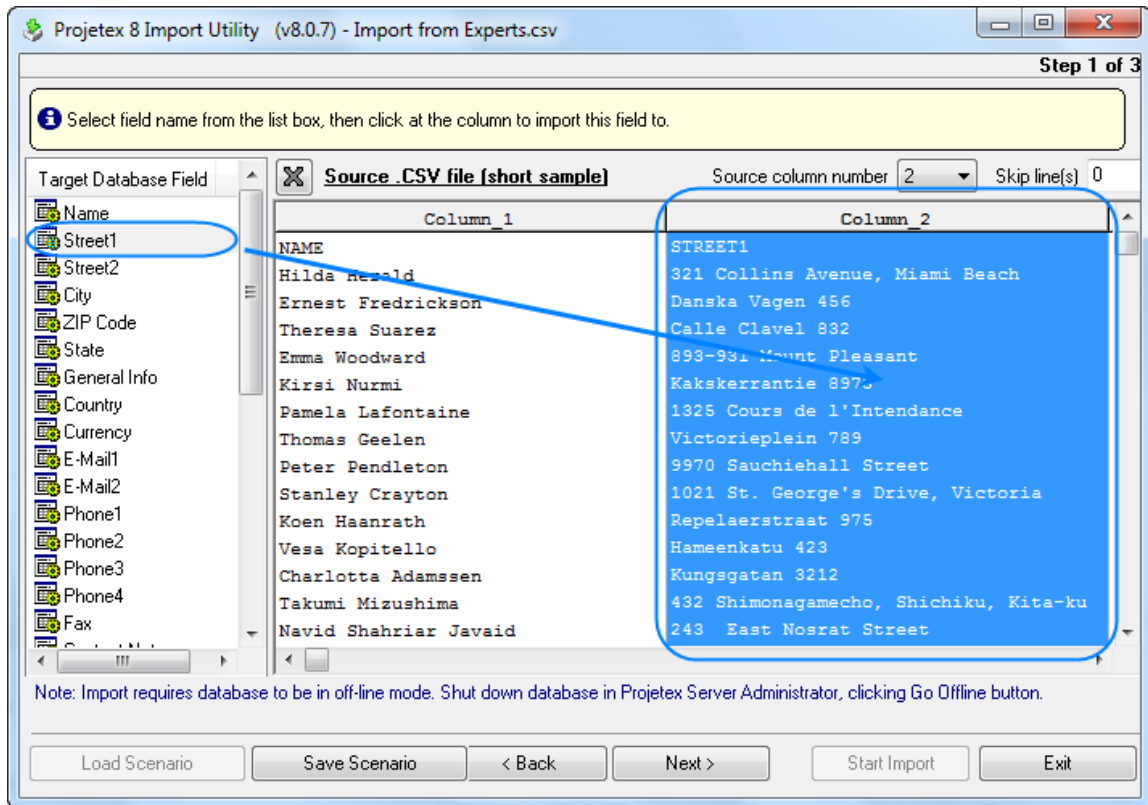
With **Projotex Import Utility** you can import data from your CSV files directly to **Projotex** database.

To before working with CSV file you need to specify delimiter (**Comma**) and text qualifier (**Quote**). You can select them manually from the corresponding drop-down lists or select **Auto** if you are not sure which delimiters are used in the file you import from.

1. Select the dataset field from the **Target Database Fields in Projotex Database** drop-down list. This is the field *where* you wish to import data.
2. Click the corresponding source table column or set the column value manually in the **Source column number** field. This is the field in source file *from* which the data must be imported.

Repeat these operations for each dataset field.

If you do not want some first rows of the source table to be imported set the number of such rows in the **Skip line(s)** edit field.



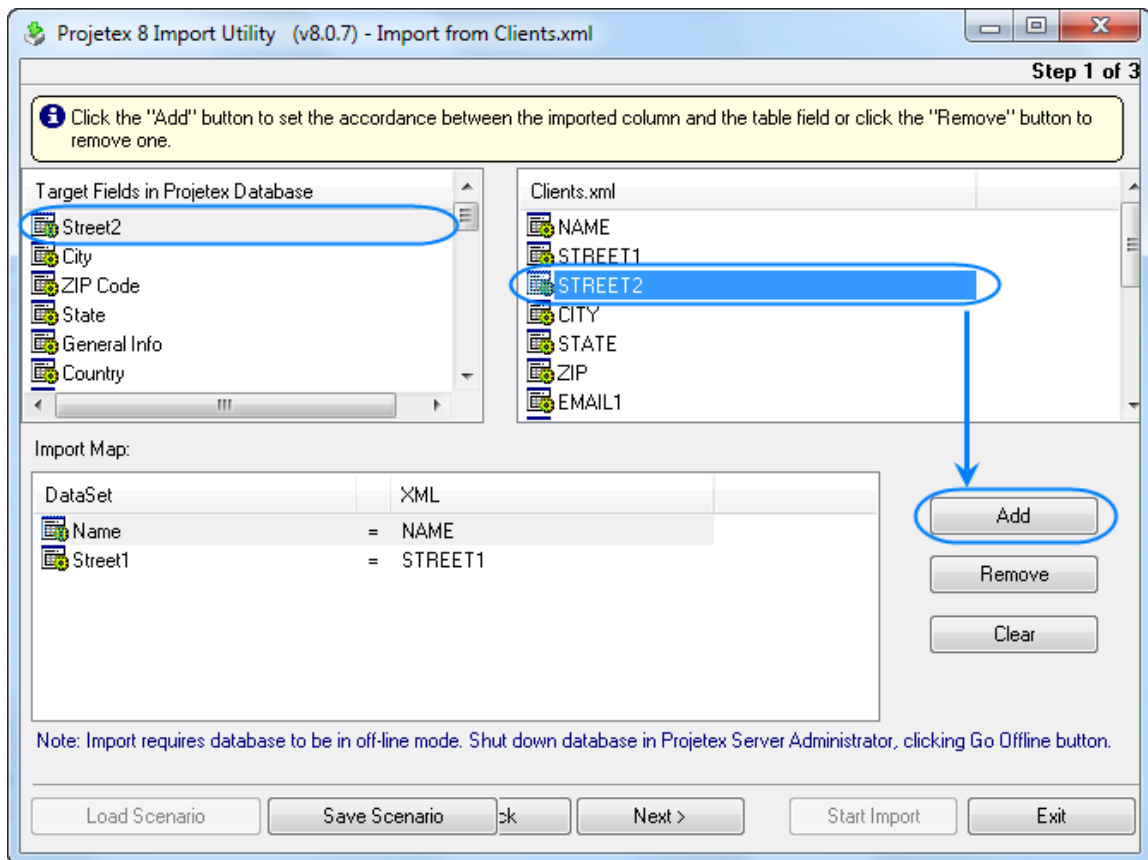
### Importing from .xml

With **Projetex Import Utility** you can import data from your XML files directly to **Projetex** database.

To link source and target fields:

1. Select the dataset field from the **Target Projetex Database Fields** list. This is the field *where* you wish to import data.
2. Select the corresponding field in the **<TABLE\_NAME>.xml** list. This is the field in source file *from* which the data must be imported.
3. Click **Add** to create a link. These fields will be added to the list at the bottom of the window.

Repeat these operations for each dataset field. If you want to remove the link, select the linked fields in the bottom list and click **Remove**.



### Using scenarios for Import Utility

Scenarios in [Projetex Import Utility](#) are used to save all settings you have selected while importing in order to quickly use them during the future imports. For example, freelance experts profiles are expected to be imported quite frequently from expert application forms. By saving import scenario after your first import, future imports can be done by loading this scenario, and clicking next through all the steps.

You can save the scenario on any step clicking **Save Scenario** button. After opening this scenario later, you will not need to repeat all steps from the beginning and will start from the point, where you saved the scenario.

To open the previously saved scenario or the default one click **Load Scenario** button, it is available only from the tab where you select the format of the source file.

### Importing Custom Queries

You can import a custom query to your database from a *pxq* file.


**Note:** Custom queries which are displayed in **Custom Queries** section of [Projetex Server Administrator](#) are the ones currently integrated into [Projetex](#) database. *PXQ* files are used solely for export-import purposes, simply copying new *PXQ* file to `\\AIT\Projctex 8.0\Projctex Server\Queries\` will not import the new query to database.

To import a custom query, use *PXQ* file to load required query.

1. Save *PXQ* file being imported to `\\AIT\Projetex 8\Projetex Server\Queries\` folder.
2. Click **Load** button.
3. Locate *PXQ* file being imported, select it and click **Open** button.

## Importing Custom Reports

You can import a custom report to your database from a *PX8* file.

 **Note:** Custom reports which are displayed in **Custom Reports** section of **Projetex Server Administrator** are the ones currently integrated into **Projetex** database. *PX8* files are used solely for export-import purposes, simply copying new *PX8* file to `\\AIT\Projetex 8.0\Projetex Server\Reports\` will not import the new report to database.

To import a custom report, use *PX8* file to load required report.

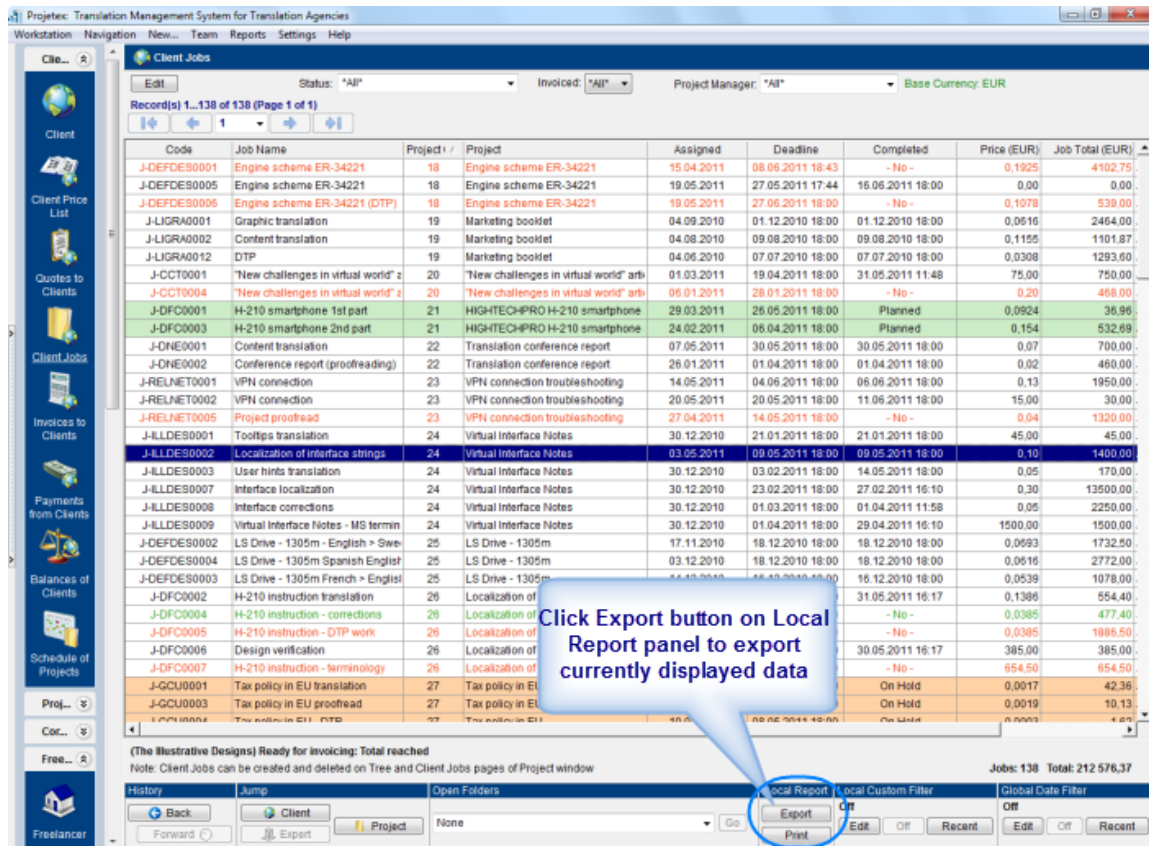
1. Save *PX8* file being imported to `\\AIT\Projetex 8.0\Projetex Server\Reports\` folder.
2. Click **Load** button.
3. Locate *PX8* file being imported, select it and click **Open** button.

## Export

### Exporting from Projetex Workstation

To export any table from **Projetex Workstation**:

1. Open this table in **Projetex Workstation**.
2. Click **Export** button on the **Local Report** panel at the bottom of **Projetex Workstation** window.



3. Select export format and click **OK** button.

To export *list of all clients, projects, corporate experts or freelancers* from Projotex Workstation:

1. Open **Main tab** of **Client, Project, Corporate Expert** or **Freelancers** window.
2. Right-click on *clients, projects, corporate experts or freelancers list* and click **Export to TXT** or **Export to CSV**.
3. Choose a location of file, which will contain exported data, and click **Save**.

To export **Custom Reports**:

1. Click **Reports** menu.
2. Select a custom report in the list.
3. Click **Export** button.
4. Select export format and click **OK** button.

You can disable *export options* for specified user in **Users and Access Settings** of **Corporate**

**Settings** in [Projetex Server Administrator](#).

To edit user access rights to *export options* you will need access to [Projetex Server Administrator](#).

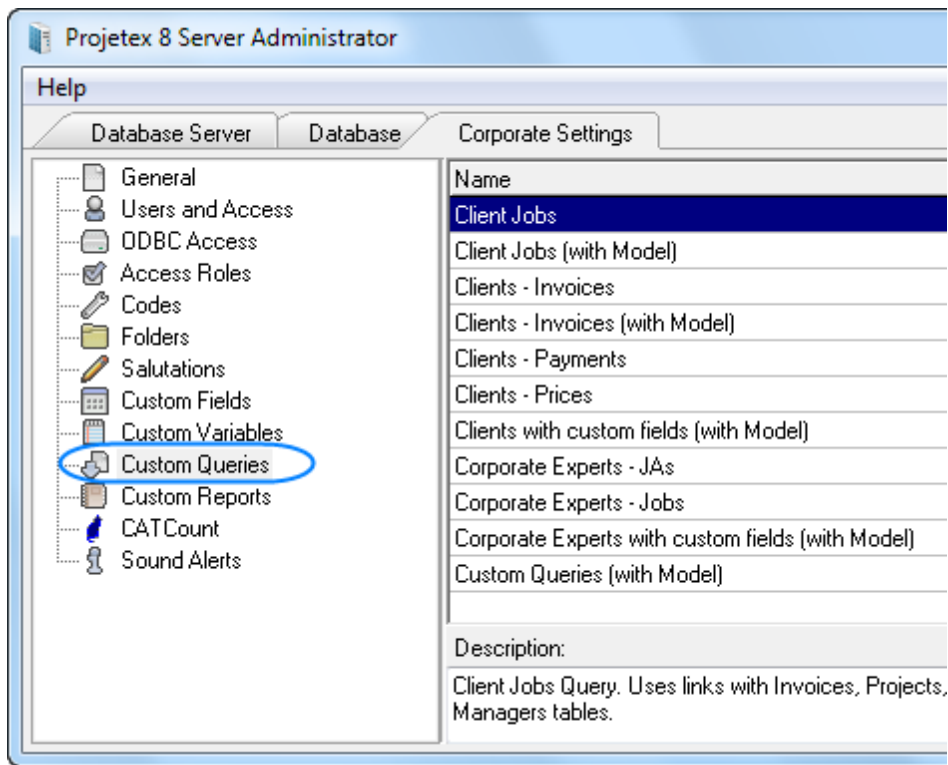
1. Run [Projetex Server Administrator](#).
2. Click **Database** tab.
3. Put your database offline by clicking **Go Offline** button.
4. Once database is offline, switch to **Corporate Settings** tab.
5. Click **Users and Access** section, select required user in the list and click **Edit** button.
6. In the **Edit User** window select or clear the **Export Local Report** and **Print Local Report** option to enable or disable access to *export options* (except **Export Custom Report** option).
7. In the **Edit User** window select or clear the **Custom Reports View** option to enable or disable access to **Custom Reports**.

## Exporting from Projetex Server

Any data stored in [Projetex Server](#) can be exported directly from database using custom queries.

To export data directly from database:

1. Run [Projetex Server](#).
2. Switch to **Database** tab.
3. Click **Go Offline** button.
4. Click **Corporate Settings** tab.
5. Click **Custom Queries**.



6. Select a query in the list.
7. Click **Export** button.
8. Select export format and click **OK** button.

## Projex Administration

### Projex Workstation settings

#### Corporate Settings


##### Groups of Services

**Groups of Services** section of **Projex Workstation Corporate Settings** can be used to add to the database the kinds of services (groups of services, in other words) you offer to your clients (e.g. translating, editing and so on.). When creating jobs or setting prices in **Projex**, you will have the possibility to select a group of services, among those, created here.

**New** button opens **New Service Group** window which can be used to enter name for group of services (50 characters maximum).

**Edit** button opens currently highlighted group of services for editing.

**Delete** button deletes currently highlighted group of services.

 **Note:** Group of services cannot be deleted if it has any services in it.

## Services


**Services** section of the **Corporate Settings** window you can enter a list of services you offer to your clients; (e.g. translating from English to French). While creating jobs or setting prices in **Projetex** you will need to select a service from the list created here.

Each service belongs to a group of services.

**New** button opens **New Service** window which can be used to enter name for a new service (50 characters maximum), and select a group of services.

**Edit** button opens currently highlighted service for editing.

**Delete** button deletes currently highlighted service.

 **Note:** Service cannot be deleted if it is used in any price, quote or a job.

## Volume Units

On the **Volume Units** tab of the **Corporate Settings** window you can create and manage the list of custom volume units, used for estimating volumes of jobs.

**New** button opens **New Volume Unit** window, which can be used to enter name for a new volume unit (50 characters maximum), and specify .

**Edit** button opens currently highlighted volume unit for editing.

**Delete** button deletes currently highlighted volume unit.

## New Volume Unit Window

If the unit you are creating consists of words/characters (with or without space) and you want to use it for text counting with built-in AnyCount:

- select **Used by AnyCount** option;
- specify if it consists of words/characters (with or without spaces) selecting the correspondent option and number of words/characters in the new unit. (For example, volume unit "lines" can consist of 55 characters without spaces).

If the unit does not refer to texts volume, e.g. "hours", leave **Used by AnyCount** option unselected.

## Currencies


In **Currencies** section of **Corporate Settings** window you can create and manage the list of currencies, which you will be able to use in all **Projetex** financial records.

**New** button opens **New Currency** window, which can be used to enter the 3-letter abbreviation for the new currency in **New Currency** window and the description of the currency (i.e. long name, 50 characters maximum) in the corresponding fields.

**Edit** button opens currently highlighted currency for editing.



**Delete** button deletes currently highlighted currency.

 **Note:** Currency cannot be deleted if it is used in any field of **Projex** (price, quote, job, etc.).

## Exchange Rates

In **Projex** different currencies can be assigned to each client and expert. To maintain consistency of financial accounts, **Projex** uses exchange rates to re-calculate all the records from client/expert currency to base currency of your company.


 **Note:** Base currency is set on the **General** section of the **Corporate Settings** tab of **Projex Server**.

**Exchange Rates** tab of the **Corporate Settings** window can be used to edit the exchange rates between your base currency and other currencies used by your clients and experts.

**New** button opens **New Exchange Rate** window, which can be used to select required foreign currency from the drop-down list and specify the rate.

**Edit** button opens currently highlighted exchange rate for editing.

**Delete** button deletes currently highlighted exchange rate.

 **Note:** The currencies list consists of currencies added on the **Currencies** section of the **Corporate Settings** of **Projex Workstation**.

## Taxes

Any taxes used in invoices and purchase orders can be added on the **Taxes** section of **Corporate Settings** window.

**New** button opens **New Tax** window, which can be used to enter tax name (50 characters maximum) and value (rate) in the appropriate fields. Note, that tax rate is entered in percentage (but without the "%" sign).

**Edit** button opens currently highlighted tax rate for editing.

**Delete** button deletes currently highlighted tax rate.

Taxes can be entered as positive value as well as negative (with "-" sign before percentage).

## Discounts/Markups

**Projex** provides you with possibility to add and automatically consider discounts and markups when issuing invoices and Pos.

You can specify discounts/markups names and rates on the **Discounts/Markups** tab of the **Corporate Settings** window.

To open **Discounts/Markups** tab click **Discounts/Markups** in the left part of the **Corporate Settings** window.

Discount rate (value) should be negative; Markups are entered/edited in the same **New Discount/**

**Edit Discount** window but must have positive value.

To create a discount or markup, click **New** button, enter Discount/Markup name and value (rate) in the appropriate fields. Note that rate should be entered in percentage (but without the "%" sign).


## Countries


When creating a new client or freelancer record in **Projetest** you can enter postal address and specify the country selecting it from the drop-down list. On the **Countries** tab of the **Corporate Settings** window you can manage the list of countries.

**New** button opens **New Country** window.

**Edit** button opens currently highlighted country for editing.

**Delete** button deletes currently highlighted country.

 **Note:** By default **Projetest** database already contains a list of countries.

 **Note:** Country cannot be deleted if it is used in any field of **Projetest** (for example, in some postal address of a client).

## Categories

**Categories** setting can be used to add, edit and remove custom types of info notes, which are displayed on **Info** tabs of **Client**, **Project**, **Corporate Expert** and **Freelancer** windows. These categories can be then used to filter all the notes by them.

**New** button opens **New Info Category** window. Enter name for the new category (50 characters maximum) and click **OK**.

**Edit** button opens currently highlighted category for editing.

**Delete** button deletes currently highlighted category.

## Payment Methods

Payment method is one of the many parameters that can be added to invoice when it is issued with **Projetest**. In this context *Payment method* means the details for performing the payment (bank details, for example).


**New** button opens **New Payment Method** window. Enter payment method name (150 characters maximum) and description in the corresponding fields.

**Edit** button opens currently highlighted payment method for editing.

**Delete** button deletes currently highlighted payment method.

## Templates

**Templates** section of corporate settings can be used to create and edit document templates and to configure local template saving options (like language and character set).

 **Note:** You can disable access to **Templates settings** for specified users. To disable access to **Templates settings**, go to **Corporate Settings** in *Projetest Server* and click **Users and Access**

settings. Then select an user, click **Edit** button and deselect **View Templates Settings** checkbox.

## Template Folders

In *Projex* all templates are stored in subfolders of *Templates* folder in centralized *BusinessServer* folder on server. In order to work with a template, you will need to download a local copy, or create new local template which later can be uploaded to server. Each template can have one of the following statuses:

**Current** - the templates stored in *Business* folder on server and in local storage are identical.

**Modified** - local copy of template file has been modified, the file on server has not been updated.

**Out of date** - template file on server has been modified, local copy has not been updated.

**Missing** - this template exists on server, but has not been downloaded to local PC yet (or has been deleted locally).

**Not in view** - template file exists locally, but has not been uploaded to server yet (or has been deleted on server).

Tree field displays the structure of templates folders. This folder structure exists both in *BusinessServer* folder, and in your local *Business* folder (default location is *D:\BusinessServer*). Templates folder contains three subfolders: CLIENTS, EXPERTS and PROJECTS. CLIENTS and EXPERTS which contain more subfolders with correspondent .RTF templates.

## Output Character Set and Language

With the help of **Output Charset** drop-down list different character sets can be selected to accommodate creating templates in various languages (including Asian hieroglyphs, Arabic characters and so on).

**Output language** drop-down list can be used to set the language of the date, time, currency, and other aspects of the file being saved.

## Current User Settings

### AnyCount

*Projex* users can enjoy the built-in *AnyCount 7.0* — word, character and custom volume units count tool. It counts single or multiple files of all commonly used file formats: *BMP, CHM, CSV, DOC, DOCX, GIF, HLP, HTM, HTML, JPG, MIF, ODP, ODS, ODT, PDF, PNG, PPS, PPT, PPTX, PUB, RAR, RTF, SDC, SDD, SDW, SLP, SXC, SXI, SXW, TXT, VSD, WPD, XLS, XLSX, XML, ZIP*.

You can specify *AnyCount* settings (general and specific for different files formats) on the **AnyCount** tab of the **Current User Settings** window.

**AnyCount** tab opens automatically when Current User Settings window opens.

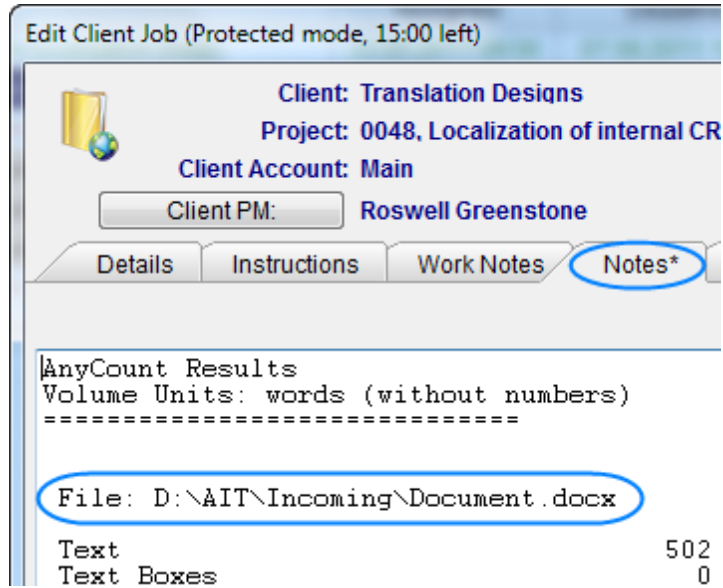
### Common Tab

When **Skip Numbers** check box is selected, **AnyCount** results does not include numbers in the documents.

If **Show Full Path** checkbox is selected, then in **AnyCount Notes** field (which appear after you use **AnyCount** when creating Client/Expert Job ) you will see the full path of the file counted.

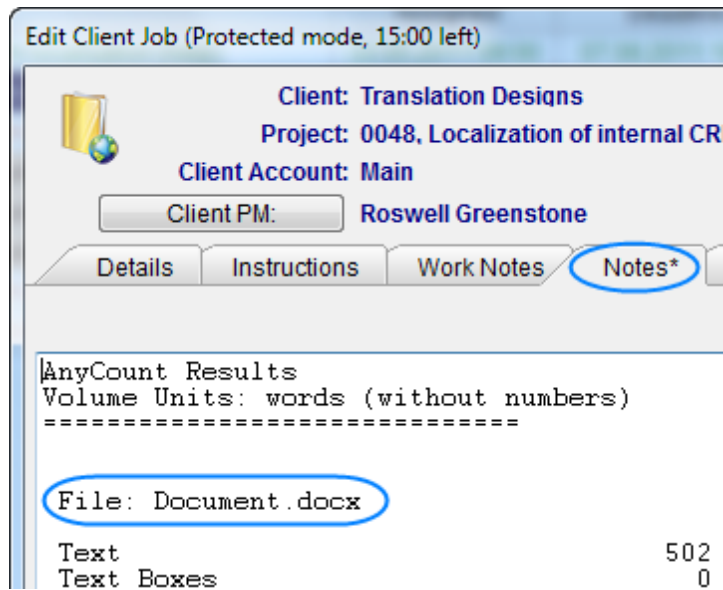
**Example:**

AnyCount notes with Show Full Path check box selected:



**Example:**

AnyCount notes with Show Full Path check box cleared:



## Format-specific Tabs

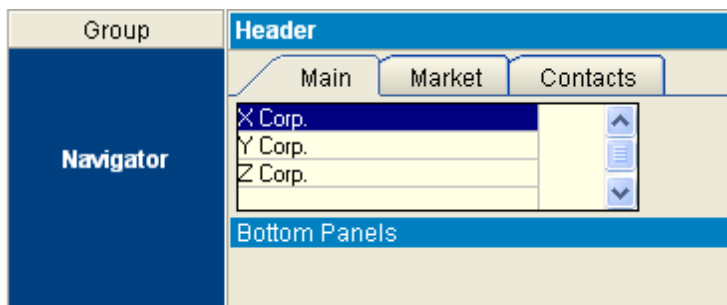
The rest of tabs can be used to set which elements will be included in count results of *AnyCount*, and which will not. The scope of elements is determined by the type of file.

**Note:** You can perform counts of *.wpd* files only if you can open them with *Microsoft Word*, i.e. you need special *Microsoft Word* packages for working with *.wpd* files to be installed.

**Note:** To count unrecognized *PDF* files, on **PDF settings** tab select **Enable PDF Graphic Recognition** checkbox and select **PDF Graphic Recognition Language** from the drop-down list. To count recognized *PDF* file, on **PDF settings** tab just deselect **Enable PDF Graphic Recognition** checkbox

## Colors: General

General color settings can be used to change colors of some of the interface elements of *Projetex*. Current settings of each element are displayed by color bars next to the buttons, and also in the preview area:



Background and text colors of the following elements can be configured:

**Navigator** — vertical navigation bar, in which all the icons are displayed.

**Group of Icons** — those are **Clients**, **Projects**, **Corporate Team**, and **Freelancers** bars on the navigation bar.

**Header** — window header colors.

**Choosers** — choosers are lists of clients, projects, client jobs, POs and experts.

**Bottom Panels** — these are **History**, **Jump**, **Open Folders**, **Local Custom Filter**, **Local Report**, and **Global Date Filter** panels, located at the bottom of *Projetex Workstation* window.

**Reset All to Ocean/Reset all to Silver** — these buttons reset all *color settings* to default color schema: *Ocean* or *Silver*.

**Currently selected row in all tables** — these are colors for highlighting currently selected record in *Projetex* tables.

## Colors: Statuses

Depending on their current status, quotes, projects, jobs, invoices and POs are highlighted with different colors in Projotex. **Colors: Statuses** section of **Current User Settings** window can be used to change these colors.

### Example:

Fragment of client jobs table, as seen in Projotex Workstation:

Job Name	Completed
Training Schedule Translation	- No -
Training Schedule	- No -
Training Schedule - proofread	- No -
Training Schedule - DTP	1/22/2009 3:10 PM

In this case, the status colors are set as follows:

**Black** — the job is completed.

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

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

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

The following status colors can be changed:

*Quotes* statuses:

- **Accepted** (default status color is green)
- **In Process** (default status color is blue)
- **Rejected** (default status color is red)

*Current Projects and Jobs* statuses:

- **Deadline is in the future** (default status color is green)
- **Deadline is today** (default status color is blue)
- **Deadline is in the past** (default status color is red)

*Outstanding Invoices/POs* statuses:

- **Not Due Yet** (default status color is green)
- **Due Today** (default status color is blue)
- **Overdue** (default status color is red)
- **Not invoiced (POs only)** (default status color is orange)

Use the corresponding buttons to open color panel and set the color for each status of quotes, current projects and jobs, outstanding invoices/POs.

A color highlight warning for projects and jobs is even more customizable: you can specify how much in advance warning statuses are assigned.

## Fonts and Sizes

On **Fonts and Sizes** tab of **Current User Settings** you can set font and size of the text in **Projetex** tables.

Select the font type and font size from the corresponding drop-down lists:

- **Font name and font size in all tables** section contains controls for fonts used in grids (tables). Click **Reset** button to set default value of font and size: MS Sans Serif, 8pt.
- **Interface font size** drop-down list can be used to set size of fonts used in GUI (buttons, drop-down lists, labels and so on). GUI fonts size can be scaled from 8 to 10.

Select size of pages:

- **Number of rows in page mode** allows to set proper number of rows to be shown on single table page in case *Page Mode* is activated.
- **Number of rows in page mode for schedules** allows to set proper number of items shown on single schedule page in case *Page Mode* is activated.

 **Note:** To disable *Page Mode*, choose **Page Mode Off** option from **Number of rows in page mode** and **Number of rows in page mode for schedules** drop-down lists.

## Position of Custom Fields

Custom fields can be used to customize database structure. By adding custom fields, you create possibility of entering additional data types to various areas and profiles of **Projetex**. Each field appears as additional control (text line, drop-down list and so on) in respective windows of **Projetex Workstation**.

*Custom fields* presence for each part (**Navigation** bar areas) of **Projetex** :

- **Clients: Main, Quotes** and **Client Jobs** and **Invoices** tabs of **Client** window
- **Projects: Main, Client Jobs, Corporate Jobs, Freelance Jobs, JAs** and **POs** tabs.
- **Corporate Team: Main, Corporate Jobs and JAs** tabs, **Corporate Expenses**
- **Freelancers: Main, Quotes, Freelance Jobs** and **POs** tabs.

Available types of custom fields: number, checkbox, string, text, date, time, date and time.

Each custom field belongs to a certain group of custom fields.

Custom fields can be added on **Custom Fields** tab of **Corporate Settings** (Server Administrator) window.

On the **Custom Fields design** tab of the **Current User Settings** you can design the view of custom groups (custom fields are grouped by) you create.

Check **Top** option to place custom groups' tabs on the top of the tab. Check **Left** option to place custom groups' tabs on the left of the tab.

## Schedules

Use **Schedules** tab of the **Current User Settings** window to select icon display options on the **Schedule** bars marking the **Projects/Client Jobs/Expert** and **Freelance Jobs** in the **Schedules** of Projetex:

**Always** — Icons are displayed on all **Schedule** bars:

Client Jobs and their Expert Jobs	June 2010										
	22	23	24	25	26	27	28	29	30		
Content translation											Translation
											Content translation

**With Distinct Jobs** — The icons are displayed only on **Schedules** where both **Corporate** and **Freelance Jobs** are displayed:

Client Jobs and their Expert Jobs	September 2010										
	18	19	20	21	22	23	24	25	26	27	
GlobalSYS manual (con...											GlobalSYS manual (
											GlobalSYS manual (consultir

**Never** — No icons displayed on **Schedule** bars whatsoever:

Client Jobs and their Expert Jobs	September 2010										
	20	21	22	23	24	25	26	27	28	29	30
Localization www.fuun...											Localization www.fuunre.com (cont
Localization www.fuun...											Localization www.fuunre.com (i

## Projetex Server settings

### Corporate Settings

#### General Section of Corporate Settings Tab

On the **General** tab of **Corporate Settings** window base currency, payment terms for freelancers and postal address format can be set.

**General** tab opens automatically when you switch to **Corporate Settings** tab of **Projetex Server Administrator**.

**Base Currency** button can be used to set or change base currency of your company. After




changing base currency the program will offer to re-define the currency exchange rates. **Base Currency** button is available only in offline mode of database. To switch database offline, **Go offline** button on **Database** tab of **Projetex Server Administrator**.

**Freelancer Payment Terms** button can be used to edit default payment terms for freelancers. Click this button to open **Edit Payment Terms for Freelancers** window. With the help of **Edit General Payment Terms for Freelancers** dialog you can configure payment conditions for freelancers, including:

- **Minimum Fee** — this is the minimum sum the POs must accumulate, before they can be paid. Type 0 in this field to disable **Minimum Fee** condition.

You can also indicate if PO should be paid within certain time (30, 45, 60, or 90 days) from the day it was sent (*PO issue date*) or on certain day of certain month.

- Select **Unknown/Other** to disable automatic payment terms control.
- **Additional Notes** — a plain text note, not limited by the number of characters.

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

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

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

To **Enable numbering of Client Invoices copies** - select the corresponding option.

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

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

## Users and Access Section of Corporate Settings Tab

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

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

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

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

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

**Hide blocked users** option removes the users, which are marked as blocked, from the view in the list.

### ODBC Access Section of Corporate Settings Tab

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

Detail information regarding ODBC access processing can be found in [ODBC access in Projetest](#) section.

### Access Roles Section of Corporate Settings Tab

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

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

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

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

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

### Codes Section of Corporate Settings Tab

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

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

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

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

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

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

**Invoices for Clients** drop-down list can be used to select the code (global or client-specific) to be used as default file name when saving invoices for printing.

**POs to Experts** drop-down list can be used to select the code (global or expert-specific) to be used as default file name when saving purchase orders for printing.

### Folders Section of Corporate Settings Tab

Location of *BusinessServer folder* as well as automatic folder creation options can be changed with the help of **Folders** tab of **Corporate Settings** window in [Projetest Server Administrator](#).

To open Folders tab, click **Folders** in the left part of the **Corporate Settings** window.

## Business folder location

**General** tab of the Folders section can be used to change location of the *Business* folder. Client, project and expert folders are located inside the *Business* folder.

To change the default location, click **Change** button and select new location on a local PC or in a network.

## Folder settings

Other tabs of the **Folders** section represent different types of folders inside *Business* folder.

Use **Add Folder** or **Add Subfolder** buttons to add folders which will be automatically created inside of each new client, project, expert, JA and PO folder.

**Project folder** tab also can be used to configure the names of project folders.

## Automatic folder creation

With the help of automatic folder creation feature for any folder in *Projex* you can define a number of subfolders to be automatically created upon creation of their parent folder . To enable this feature for certain folder type, select **Automatic Folder Creation** checkbox on the tab of required folder in *Projex Server Administrator*, in **Folders** section of **Corporate settings** tab.

Every time **Client**, **Project** or **Expert** folder is created by *Projex Workstation*, any folders or subfolders added to respective tab of **Folders** settings will be created in that folder automatically

To disable creation of customized folders clear **Automatic Folder Creation** on the corresponding tab.

All changes with these custom folders will not be implemented for client and expert with existing **Client** or **Expert** folder.

## Project folder name

The way **Project folders** are named can also be customized to some extent. Name of each **Project folder** can consist of the following components:

*Project code (obligatory)*

*Project manager name*

*Project name*

Composition of **Project folder** names can be modified on the **Project Folder** tab of the **Folders** tab of *Projex Server Administrator Corporate Settings*.

Click **Update Folders** button to apply changes to the names of all Project folders, created before. This feature is available only for name of projects' folders and does not have effect on other folder names.

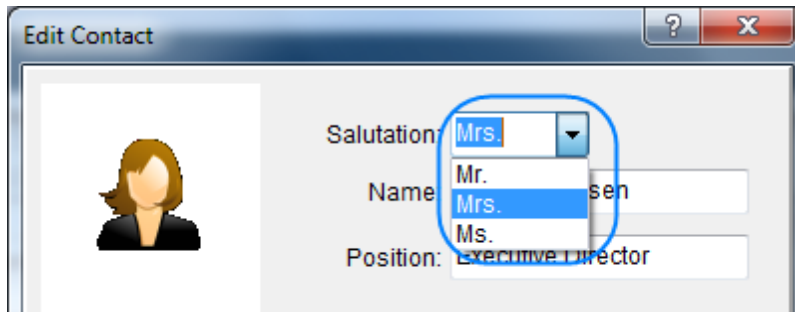
### Salutations Section of Corporate Settings Tab

Use **Salutations** tab of the **Corporate Settings** window to create new or edit existing salutations if needed.

Double-click any salutation in the list to edit it.

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

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



### Custom Fields Section of Corporate Settings Tab

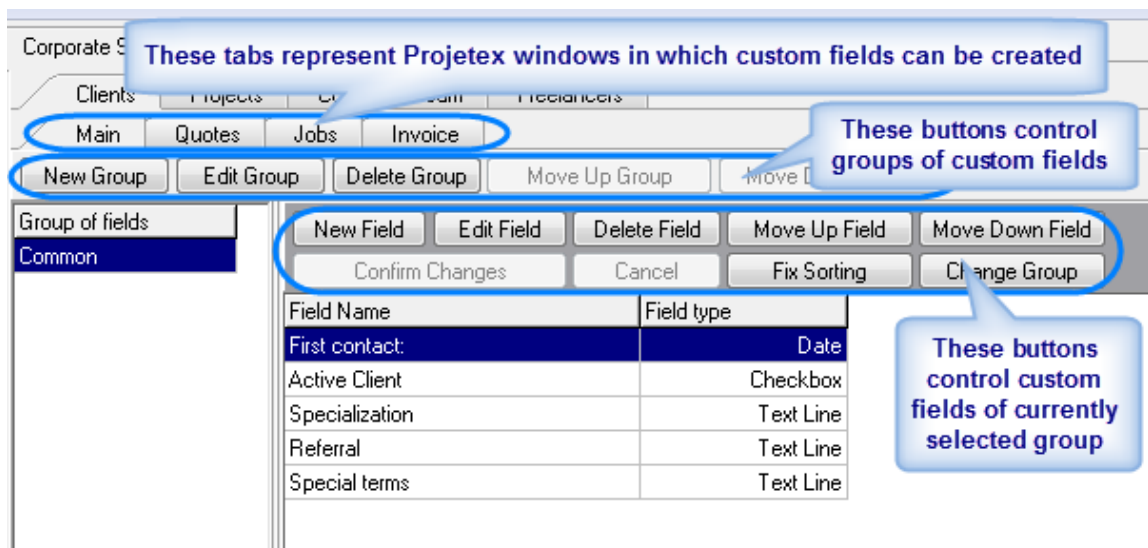
Custom fields and their groups can be created and edited in this area.

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

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

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

**Move Up** and **Move Down** buttons can be used to change the order in which custom fields are displayed in **Projotex Workstation**.



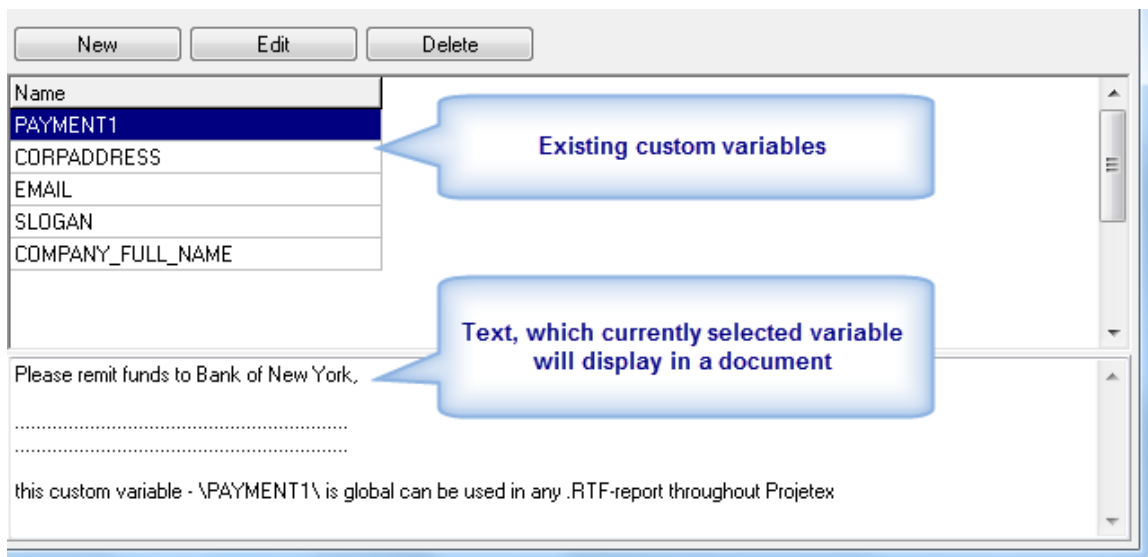
Detail information regarding Custom Field processing can be looked into [Database Customization](#) section.

**Custom Variables Section of Corporate Settings Tab**

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

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

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



**Example:**

If you enter *EMAIL* as a name of the variable and [info@marsonlymars.com](mailto:info@marsonlymars.com) as a content, you will be able to use `\EMAIL\` variable inside all your .rtf templates.

If later e-mail of your company changes to [info@venusforever.com](mailto:info@venusforever.com) you will not have to change it in all templates but will be able to do this only once in **Administrator: global custom variables**.

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

**Example:**

To add an *EMAIL* variable to a template, open template with a text editor and type `\EMAIL\` on the location where variable text must be displayed.

### Custom Queries Section of Corporate Settings Tab

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

Double-click any of the queries in the list to open this query [Query Builder](#) window.

Use [New/Edit/Delete](#) to create, modify or delete custom queries.

Click [Export Data](#) button to save query results in TXT, CSV, HTML, RTF, XLS or PDF file.

Click [Print Data](#) button to send query results directly to printer.

Click [Load](#) button to import a custom query from a PXQ file.

Click [Save](#) button to export custom query to a PXQ file.

### Custom Reports Section of Corporate Settings Tab

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

Use [New/Edit/Delete](#) to create, modify or delete custom reports.

Click [Edit Details](#) button to open [Edit Custom Report](#) window where reports name and description can be changed.

Click [Set](#) button to create a display sample of currently selected report. This sample will be displayed when the report is accessed from the [Projetex Workstation](#).


Click [View](#) button to preview saved sample of currently selected report.

Click [Clear](#) to delete saved sample of currently selected report.

Click [Preview](#) button to run currently selected report and view its results in a separate window.

Click [Load](#) button to import a custom report from a PXR2 file.

Click [Save](#) button to export currently selected custom report to a PXR2 file.

 **Note:** Custom reports which are displayed in [Custom Reports](#) section of [Projetex Server Administrator](#) are the ones currently integrated into [Projetex](#) database. *PXR2* files are used solely for export-import purposes, thus deleting *PXR2* file from *C:\Program Files\AIT\Projetex 9\Projetex Server\Reports\* will not delete any of reports in database.

### CATCount Section of Corporate Settings Tab


This area contains a few controls of [CATCount](#) tool used to calculate volumes of computer-assisted translation.

Select [Enabled](#) check box to enable [CATCount](#) in [Projetex Workstation](#).

Click [Change](#) button and select wordcount units in which [CATCount](#) must provide its counts.

CATCount supports only word-based units.

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

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

### Sound Alerts Section of Corporate Settings Tab

In *Projetex* the following events are announced with **Sound Alerts**:

- insufficient disk space reached on *Projetex Server PC*;
- time for editing of a locked record expires on *Projetex Workstation PC*.

To open **Sound Alerts** tab, click **Sound Alerts** in the left part of **Corporate Settings** window.

To enable *insufficient free disk space alert* select **Insufficient disk space on Server PC, warn if less than ... Mb** option and specify free disk space (If free space left becomes less than a volume specified, sound alert starts).

To enable locked records time expiry alert, select the corresponding option.

## Database Administration

### Starting and Stopping Database Server

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

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


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

### Stopping the Server

The following procedures may require stopping *Firebird Server*.

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

- *Manual restore*. When the server is stopped, it is safe to place projetex.fdb stopped-server backup file you have made before into its original location (*C:\Program Files\AIT\Projetest 9\Projetest Server\Database*).
- *Moving current database* away before running regular restore.
- *Upgrade* of the *Firebird Database Server* software. You will be notified when this upgrade would be recommended.

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

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

## Switching database offline or online

To change status of the database click **Go Online** or **Go Offline** button (depending on current database status) on **Database** tab of *Projetest Server Administrator*.

The following options are available when switching database offline:

**Normal (recommended)** — *Projetest* will wait for the specified time until all workstations have disconnected before turning database offline. *Projetest Server* will not proceed with shutdown if at least one *Workstation* remains connected.

**Restrictive** — this shutdown mode is the same as *Normal* mode, only this time new connections are not permitted while *Projetest Server* is waiting for *Workstations* to close. *Projetest Server* will not proceed with shutdown if at least one *Projetest Workstation* remains connected.

**Forced** — forcefully disconnect all *Projetest Workstations* from database. Using this option is inadvisable, since such operation may cause the loss of data being entered into *Projetest* at the time of shutdown.

## Backup

It is recommended to perform regular backups of *Projetest <%VAERSION%>* database. You can perform backup of the database at any time by clicking **Backup** button on the **Database** tab of the *Projetest <%VAERSION%> Server Administrator*.

To perform a backup operation:

1. Click **Backup** button on the **Database** tab of *Projetest Server Administrator*.
2. Specify the location of backup file by clicking **Select** button.
3. Enter backup file name in the **Backup File** field.
4. Click **OK** button to begin backup operation.



## Quick Optimization

Optimization operation frees up the unused space in the database file which may improve performance on some systems. This operation can be performed from the **Database** tab of the **Projetex Server Administrator**.

To perform a quick optimization:

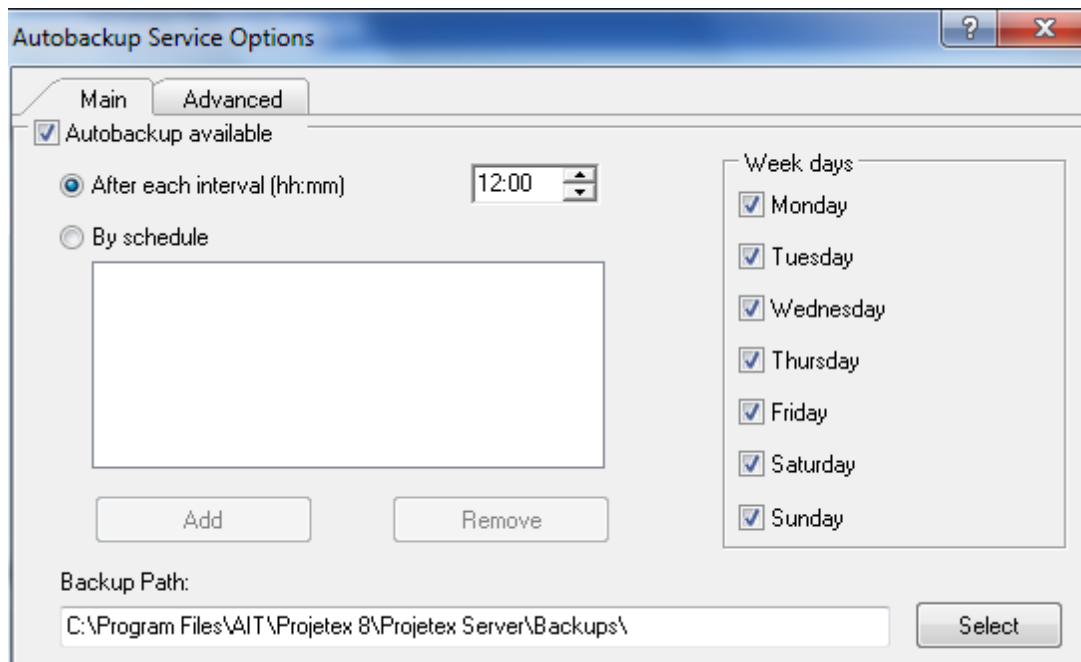
1. Click **Quick Optimization** button on the **Database** tab of **Projetex Server Administrator**.
2. Click **Yes** button in the confirmation dialog and wait for the quick optimization process to complete.

Need for optimization may vary depending on the number of records in database and number of everyday writes to database, but running **Quick Optimization** at least once a week is a good practice.

 **Note: Quick Optimization** is performed automatically during **Backup** command. If you do backups regularly, there is no need to run **Quick Optimization**.

## Autobackup Service

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



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

- **Autobackup available** - select this check box to activate autobackup service.
- **After each interval (HH:MM)** option configures service to be run every time after given time passed since last autobackup. Maximum periodicity available is every 15 minutes.
- To configure *autobackup service* to be run in the certain time, select **By schedule** check box.

Use **Add** and **Remove** buttons to create new time rule and delete existing respectively.

- **Week days** block - select necessary days of the week for automatic backup
- Path to save *autobackup* files can be changed by clicking **Select** button to the right of current path and browsing for proper folder in **Select directory** dialog.

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


- **Cleanup old backups** block - for disk space economy system can periodically delete old backup files. Select **Enable cleanup** to switch this option on. Enter number of days after which backup files will be considered as outdated into **Cleanup backups which are older than** field.
- In **Log** block it is possible to activate autobackup log to record all automatic backup service operations. Select **Enable Log** check box to activate proper option. Logs can be recorded either within predefined period or constantly. Use **Keep logs for last N month** drop-down list to specify log record duration. Click **View Current Log...** button to browse through latest blog records.
- **ZIP** block - select **Backup as ZIP archive** to make service generate automatic backups in *ZIP* format instead of *FBK*.

## Restore

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

To restore your database from a backup file:

1. Turn your database offline by clicking **Go offline** button.
2. Open your database folder (its address is displayed in **Projetex Database:** information string) and rename (or delete) your current *Projetex.fdb* file.
3. Click **Restore** button on the **Database** tab of **Projetex Server Administrator**.
4. Click **Select** button in **Restore Database** dialog and locate required backup *.FBK* file (by default these files are stored in *C:\Program Files\AIT\Projetex 9\Projetex Server\Backups\*) and click **OK** to begin restore operation.

 **Note:** As a security measure, **Restore** command requires you to move away existing database from database path (*C:\Program Files\AIT\Projetex 9\Projetex Server\Database\projetex.fdb*) first. Make sure that the database is in **Offline** mode before moving it away. If Windows® generates "Access denied" error during move operation, stop **Firebird Database Server**.

## Run Update Script

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

manually by running a *database update script*.


Update scripts are always installed together with **Projetex Server Administrator** and can be found in *C:\Program Files\AIT\Projetex 9\Projetex Server\DBUpdates\* folder in the form of *.PTU* files.

To update database using a database update script:

1. Turn your database *offline* by clicking **Go Offline** button.
2. Click **Run Update Script** button from the **Database** tab of the **Projetex Server Administrator**.
3. Locate the script which updates your current database version to a next version. Current database version is displayed in **Database Version:** string on the **Database** tab of **Projetex Server Administrator**. Repeat update operation until you have the most current database version.

#### Example:

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

 **Note:** **Projetex Server Administrator** does mandatory backup before each database update operation, for maximum security of data in case anything goes wrong during the update.

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

## Clear Locks


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

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

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

To run **Clear Locks** procedure:

1. Turn your database *offline* by clicking **Go Offline** button.
2. Click **Clear Locks** button from the **Database** tab of the **Projetex Server Administrator**.

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

## Check Integrity

Run **Check Integrity** operation in case if **Projetex** displays check integrity error messages.

To check your database for integrity:

1. Turn your database offline by clicking **Go offline** button.
2. Click **Check Integrity** button.

 **Note:** Do not forget to switch back to the Online mode to make [Projetex Server](#) available for [Projetex Workstations](#) again.

## Repair


Repair operation attempts to repair database integrity using a "healthy" database file copy. Perform Repair operation in case you are receiving errors after running [Check Integrity command](#).


To repair your database structure with the help of backup database file copy:

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

As a security measure, [Projetex Server Administrator](#) cannot run any repairs on the original location of the [Projetex](#) database (*C:\Program Files\AIT\Projetex 9\Projetex Server\Database\projctex.fdb*). You should copy the database to some other location before running **Repair** command. Do not forget to switch database into *Offline* mode before copying, otherwise copy can be imperfect.

3. Specify the location of the database copy by clicking **Select** button.

 **Note:** One way to obtain a copy of your database file with the help of backup database file copy is to rename or move your current *Projctex.fdb* file and run [Restore](#) operation. After the process has been completed, move the restored *Projctex.fdb* file to *C:\Program Files\AIT\Projetex 9\Projctex Server\Repair\* folder, return your current *Projctex.fdb* to *C:\Program Files\AIT\Projctex 9\Projctex Server\Database\* folder, and attempt repair operation.

 **Note:** If **Repair** fails, the only alternative is to restore database from most recent backup, therefore it is important to backup often or use [Autobackup Service](#).

## View Online Users

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


To view connection details, click **List** button on the **Database** tab of [Projetex Server Administrator](#).

This will open **Logged users** window listing all currently logged in users. You can disconnect selected user using **Disconnect** button in **Connected Users** window.

## Database Customization

### Custom fields

[Projetex](#) supports database structure customization in the form of adding custom fields to certain tables in database. Custom fields can be added with the help of **Custom Fields** section of **Advanced Settings** window.

 **Note:** You can create custom groups of fields as well and variables for displaying custom fields value in your *.rtf* templates.

To open **Custom Fields** tab click **Custom Fields** in the left part of **Projetex Server Corporate Settings** window.

When creating a new custom field, you will need to specify a group of fields to which the newly created field belongs. So if you want it to be other than default **Common** group, create custom **Group of fields** first.

*Custom fields* can contain the following data :

1. **Clients:**

- **Main** tab of **Client** window (client profile)
- **Quotes to Clients**
- **Client Jobs**
- **Invoices**

2. **Projects** (**Main** tab of **Project** window only).

3. **Corporate Team:**

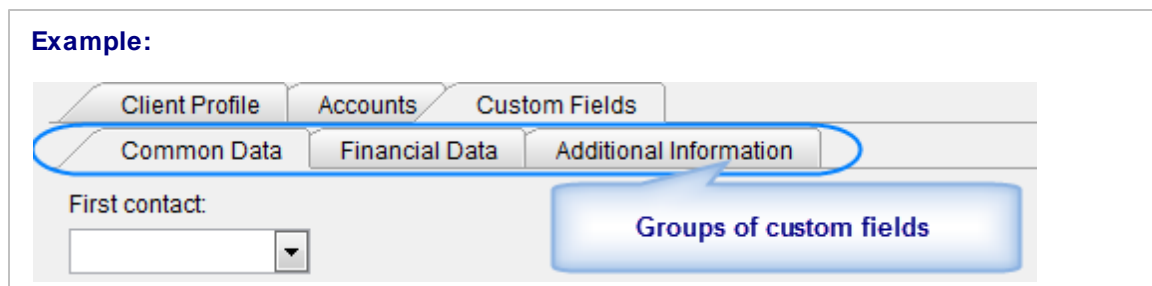
- **Main** tab of **Corporate Expert** window (expert's profile)
- **Corporate Jobs**
- **Corporate Expenses**
- **JAs**

4. **Freelancers:**

- **Main** tab of **Freelancer** window (freelancer's profile)
- **Freelancer Quotes**
- **Freelance Jobs**
- **POs**

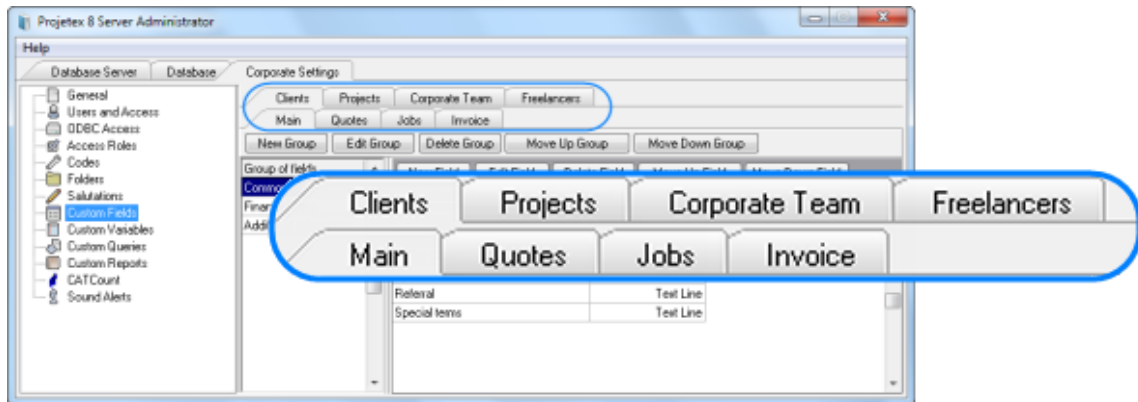
### Creating Groups of Custom Fields

Each group of custom fields represents a separate tab in **Projetex Workstation**.



To create or modify a group of custom fields:

1. Run **Projetest Server Administrator**.
2. On the **Database** tab click **Go Offline** button.
3. Switch to **Corporate Settings** tab.
4. Click **Custom Fields**.
5. Select the table to which a new custom field must be added.



6. Click **New** button in the group of fields control buttons or double-click any group to edit its name.

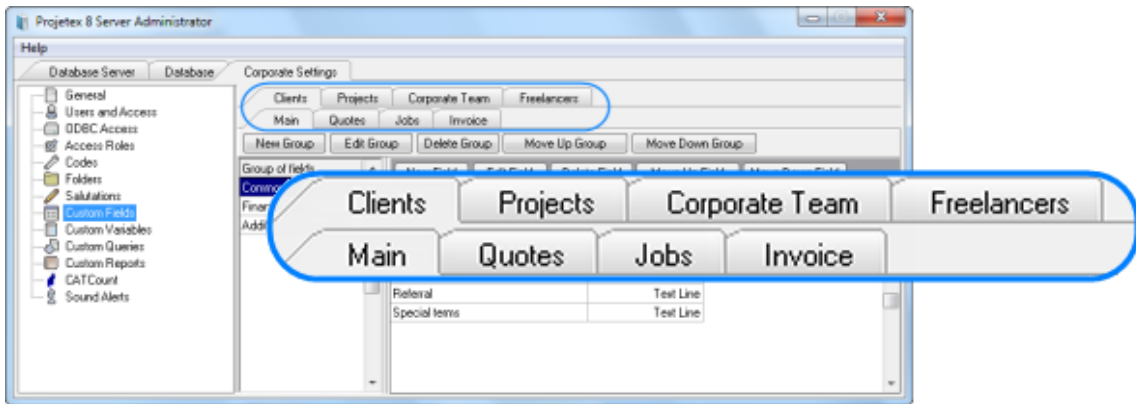
**Note:** To be able to delete the **Group of fields**, you need to delete all **Custom Fields** it contains first.

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

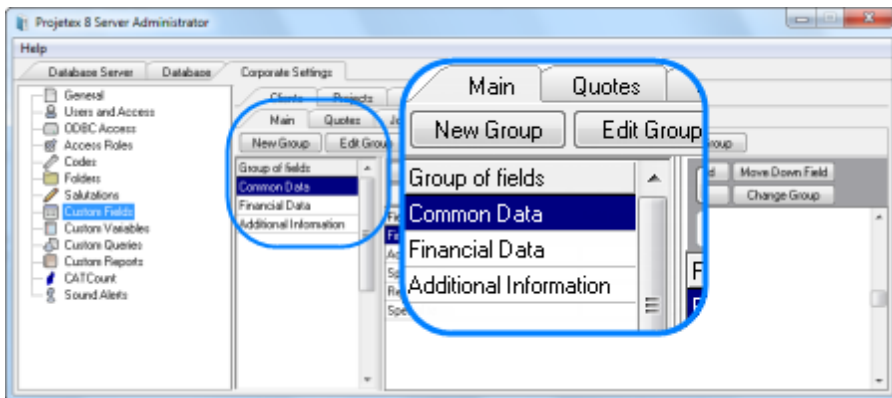
### Creating Custom Fields

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

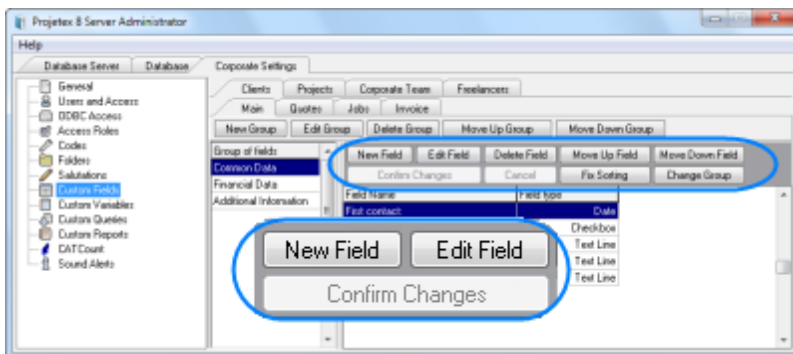
1. Run **Projetest Server Administrator**.
2. On the **Database** tab click **Go Offline** button.
3. Click **Corporate Settings** tab.
4. Click **Custom Fields**.
5. Select the required area tab (**Client**, **Project** and so on)



6. Select a group of fields.



6. Click **New** button.

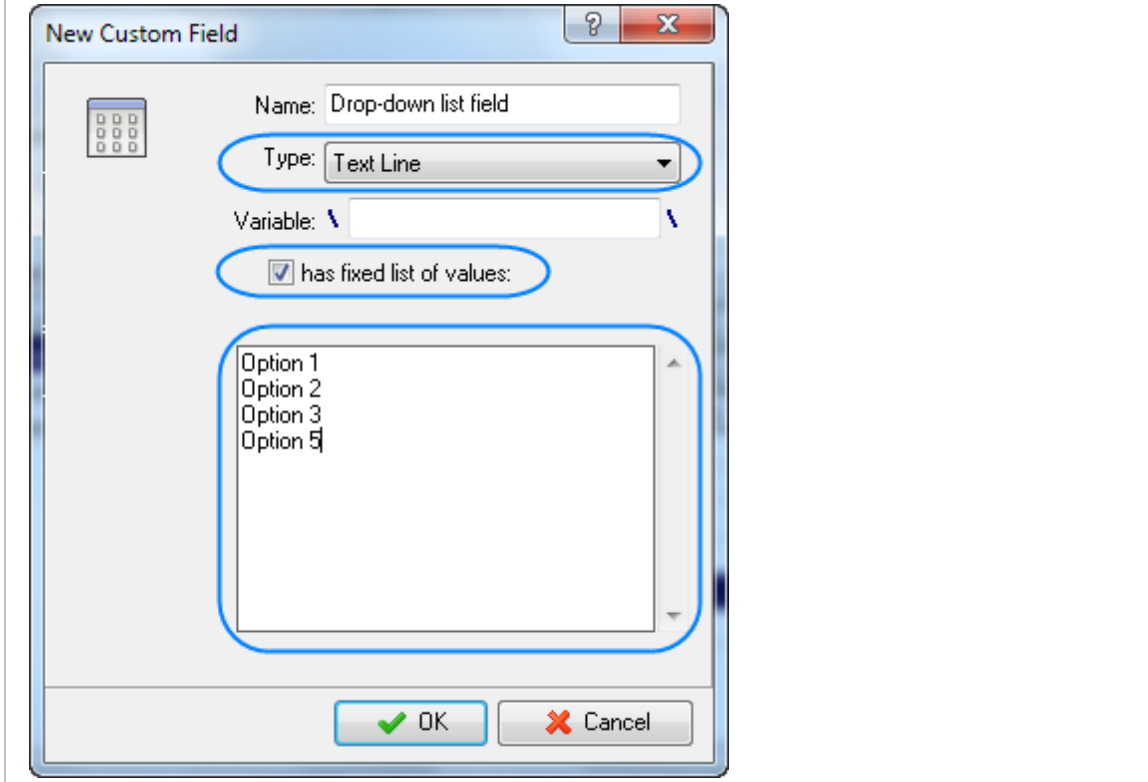


3. Fill the fields of the **New Custom Field** window:

- Enter the name of the new custom field in **Name** field.
- Select the data type of the new custom field from **Type** drop-down list.
- (Optional) Enter the name for this custom field; you will be able to use this variable in the .RTF templates.
- Click **OK** button to add the specified custom field or click **Cancel** to discard.

**Example:**


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



To move the custom fields to another **Group of fields**, i.e. another tab, click **Change Group** button, point with the mouse arrow at the target **Group of fields** (**Group of fields** records become blue when you point at them), and click on it once.

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

To confirm changes which you have done, click **Confirm Changes** button.

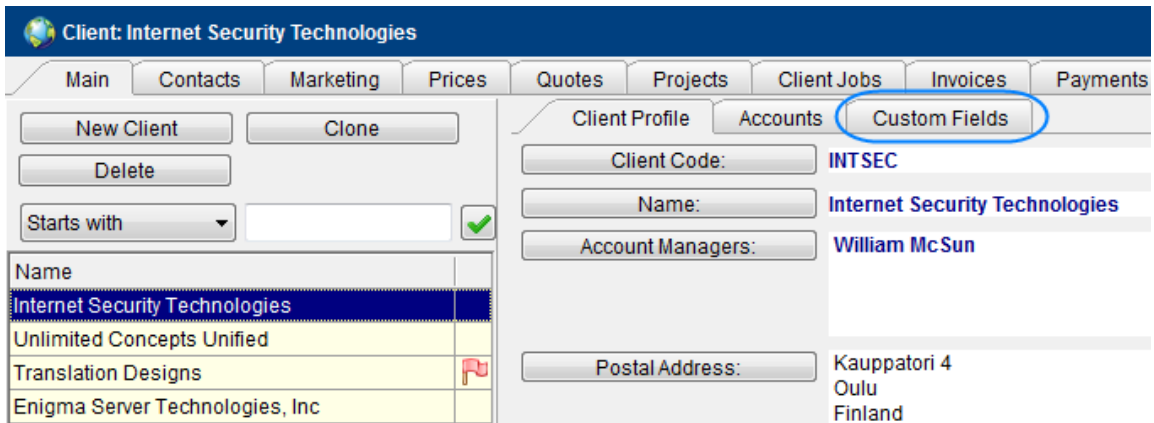
 **Note:** If you have not clicked this button and go out from **Custom Fields** settings, **Projex** will ask you whether changes must be saved.

**Accessing Custom Fields**

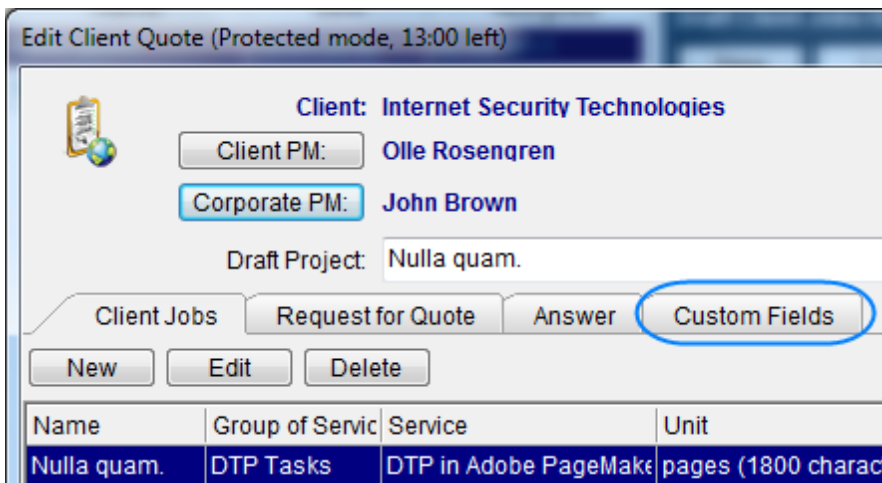
Custom fields can be accessed on **Custom Fields** tab of respected area in **Projex Workstation**.

Fields created under **Clients** and **Main** tab can be accessed on **Main** tab of **Client** window in **Projex Workstation**.

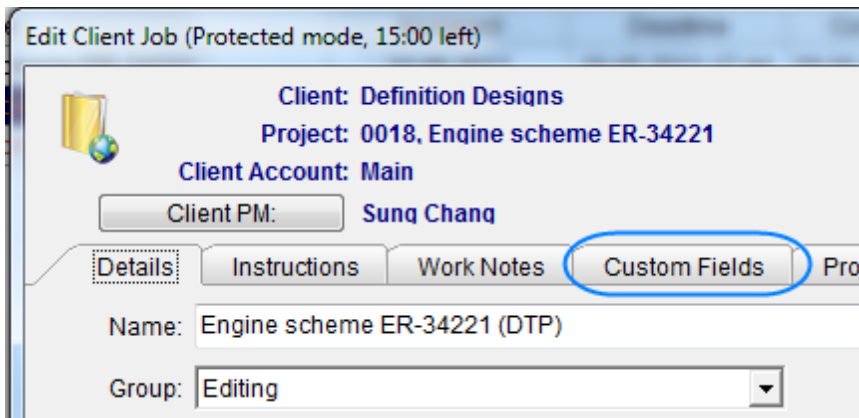




Fields created under **Clients** and **Quotes** tabs can be accessed on the **Edit Client Quote** window in Projex Workstation.



Fields created under **Clients** and **Jobs** tab can be accessed on the **Edit Client Job** window in Projex Workstation.



Fields created under **Clients** and **Invoices** tab can be accessed on the **Edit Invoice** window in Projex Workstation.

Edit Invoice (Protected mode, 15:00 left)

From: Advanced International Translations ©  
To: Internet Security Technologies

Date Sent: 25.08.2010  
Code: I-INTSEC0001  
Global Code: ACME-I0017/2010

Approved (Jobs Locked)  
Attention: Charlotta Rintala

Client Jobs Adjustments Payment Method Linked with Payments Notes **Custom Fields**

Completed	Job Code	Job Name	Client PM	Group of Ser	Service
21.05.2011 18	J-INTSEC0001	SSH technolo	Charlotta Rintala	Editing	Proofreading

Fields created under **Projects** tab can be accessed on the **Main** tab of **Project** window in Projetex Workstation.

Project: 0035, SSH technology

Main Tree Client Jobs Corporate Jobs Freelance Jobs Freelance Team JAs PC

New Project Delete

Starts with

C /	Project Name	
0021	HIGHTECHPRO H-210 smartphone sp	
0022	Translation conference report	
0023	VPN connection troubleshooting	
0024	Virtual Interface Notes	

Project Profile **Custom Fields**

Name: SSH technology  
Client: Internet Security Technologies  
Client Account: (Default) Main: William McSun  
Client PM: Charlotta Rintala  
Corporate PM: William McSun

Fields created under **Corporate Team** and **Main** tab can be accessed on the **Main** tab of **Corporate Expert** window in Projetex Workstation.

Corporate Expert: Allyson Laven

Main Corporate Jobs JAs Files Info Schedule

New Corporate Expert Delete

Starts with

Name	
Allyson Laven	
Javier Kuster	
Bryon Ortolano	
Alvaro Wigren	

Expert Profile **Custom Fields\***

Expert Code: AL  
Name: Allyson Laven  
Contact Info: E-mail: Allyson@projetex.com  
Phone: + 32 223 4890324  
Next Codes:  
AHC: 15,00

Fields created under **Corporate Team** and **Jobs** tabs can be accessed on **Edit Corporate Job** window in Projetex Workstation.

Edit Corporate Job (Protected mode, 15:00 left)

Project: 0047, Marital contract translation  
 Client Account: Main  
 Corporate Expert: - Not Selected -

Details Instructions Work Notes **Custom Fields**

Name: Marital contract proofreading

Group: Editing

Service: Proofreading

Volume: 22100 words

Time Spent: 0 hours 0 minutes  
 Productivity: 0 words/hour

Fields created under **Corporate Team** and **Corporate Expenses** tabs can be accessed on **Edit Corporate Expense** window in Projex Workstation.

New Corporate Expense

Main **Custom Fields**

Date: 01.08.2011

Value: 1000,00

Description:  
 Transportation costs

Fields created under **Corporate Team** and **JAs** tabs can be accessed on **Edit JA** window in Projex Workstation.

Edit JA (Protected mode, 15:00 left)

Corporate Expert: Jennie Schofield  
 Project: 0025, LS Drive - 1305m  
 Approved (Jobs Locked)

Expert Jobs Instructions **Custom Fields**

Assigned	Job Code	Job Name	Volume	Group of Servi
25.11.2010	J-JS0001	LS Drive - 1305m -	25000	Translation

Fields created under **Freelancers** and **Mains** tab can be accessed on **Main** tab of **Freelancer** window in **Projetex Workstation**.

**Freelance Expert: Hilda Herald**

Navigation tabs: Main | Application | Prices | Quotes | Freelance Jobs | POs | Payments | Balance | Files

Buttons: New Freelancer | Delete | Search

Starts with: [Dropdown] [Input] [Checkmark]

Name	
Hilda Herald	[Icon]
Ernest Fredrickson	[Icon]
Vesa Kopitello	[Icon]

**Expert Profile** | **Custom Fields\***

Expert Code: HH

Name: Hilda Herald

Postal Address: 321 Collins Avenue, Miami Be:  
Miami Beach  
Florida

Contact Info: E-mail: hilda@aihelp.com  
Phone: +1 305 790234

Fields created under **Freelancers** and **Quotes** tabs can be accessed on **Edit Freelancer Quote** window in **Projotex Workstation**.

**Edit Freelance Quote (Protected mode, 15:00 left)**

**Freelancer:**  
Vesa Kopitello

Navigation tabs: Details | Request for Quote | Answer | **Custom Fields**

Possible Job: Purchase estimates

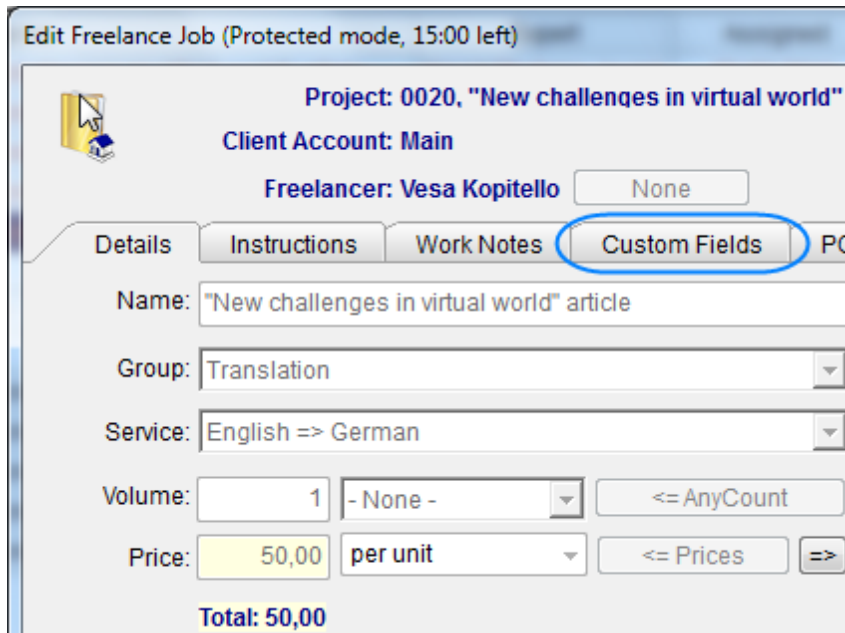
Group: Translation [Dropdown]

Service: English => Finnish [Dropdown]

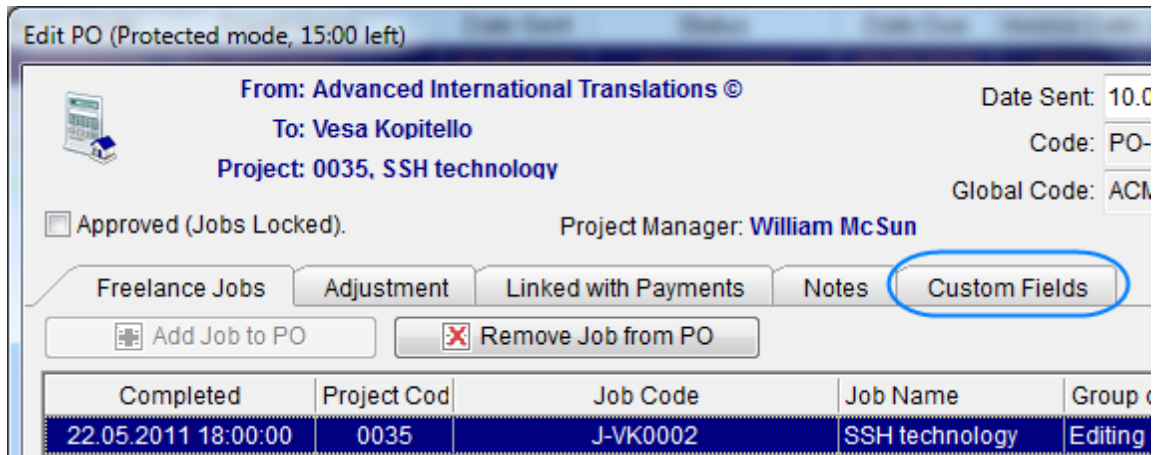
Volume: 23445 words [Dropdown] <=> Any

Price: 0,023 per unit [Dropdown] <=> Price

Fields created under **Freelancers** and **Jobs** tabs can be accessed on **Edit Freelance Job** window in Projtex Workstation.



Fields created under **Freelancers** and **PO** tabs can be accessed on **Edit PO** window in Projtex Workstation.



## Managing Users

### Adding/Editing a user

Projetex Workstation accounts can be created and modified in the Projetex Server Administrator. To add or edit a user account:

1. Run Projetex Server Administrator.
2. Click **Corporate Settings** tab.
3. Click **Users and Access**.
4. Click **New** or **Edit** button to create a new user account or modify an existing one. Also you can double-click any user in the list to edit access rights for this user.
5. Enter new user credentials and configure necessary permissions to certain sections and tabs in **New/Edit User** window.

**Edit User**

Position: Project Manager

View Reports  
 Show AHC data  
 View Template Settings

Local Reports  
 Export  
 Print

Name: Fernando Lucena  
 Login: Fernando  
 Password: [masked]  
 Access is blocked  
 Copy from Access Role  
 User's E-mail: [empty]

Access to Navigator

- Client
- Client Price List
- Quotes to Clients
- Client Jobs
- Invoices to Clients
- Payments from Clients
- Balances of Clients
- Schedule of Projects
- Project
- Client Jobs
- Corporate Jobs
- Freelance Jobs
- Project Balances
- Schedule of Client Jobs
- Corporate Expert
- Corporate Jobs
- Job Assignments
- Corporate Expenses
- Schedule of Corporate Jobs
- Freelancer
- Freelance PriceList
- Quotes from Freelancers
- Freelance Jobs

Access to windows with multiple pages

Client	Project	Corporate Expert	Freelancer
<input checked="" type="checkbox"/> Main	<input checked="" type="checkbox"/> Main	<input checked="" type="checkbox"/> Main	<input checked="" type="checkbox"/> Main
<input checked="" type="checkbox"/> Contacts	<input checked="" type="checkbox"/> Tree	<input checked="" type="checkbox"/> Corporate Jobs	<input checked="" type="checkbox"/> Application
<input checked="" type="checkbox"/> Marketing	<input checked="" type="checkbox"/> Client Jobs	<input checked="" type="checkbox"/> JAs	<input checked="" type="checkbox"/> Prices
<input checked="" type="checkbox"/> Prices	<input checked="" type="checkbox"/> Corporate Jobs	<input checked="" type="checkbox"/> Files	<input checked="" type="checkbox"/> Quotes
<input checked="" type="checkbox"/> Quotes	<input checked="" type="checkbox"/> Freelance Jobs	<input checked="" type="checkbox"/> Info	<input checked="" type="checkbox"/> Freelance Jobs
<input checked="" type="checkbox"/> Projects	<input checked="" type="checkbox"/> Freelance Team	<input checked="" type="checkbox"/> Schedule	<input checked="" type="checkbox"/> PDs
<input checked="" type="checkbox"/> Client Jobs	<input checked="" type="checkbox"/> JAs		<input checked="" type="checkbox"/> Payments
<input checked="" type="checkbox"/> Invoices	<input checked="" type="checkbox"/> PDs		<input checked="" type="checkbox"/> Balances
<input checked="" type="checkbox"/> Payments	<input checked="" type="checkbox"/> Balances		<input checked="" type="checkbox"/> Files
<input checked="" type="checkbox"/> Balances	<input checked="" type="checkbox"/> Files		<input checked="" type="checkbox"/> Info
<input checked="" type="checkbox"/> Files	<input checked="" type="checkbox"/> Info		<input checked="" type="checkbox"/> Schedule
<input checked="" type="checkbox"/> Info	<input checked="" type="checkbox"/> Schedule		
<input checked="" type="checkbox"/> Schedule			

Advanced (user can view all clients and projects and can assign Account Managers and Project Managers)  
 Normal (user can view only assigned clients or projects and can assign Project Managers )  
 Corporate Expert (Auto)

OK Cancel

## New/Edit User Window

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

### General information

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

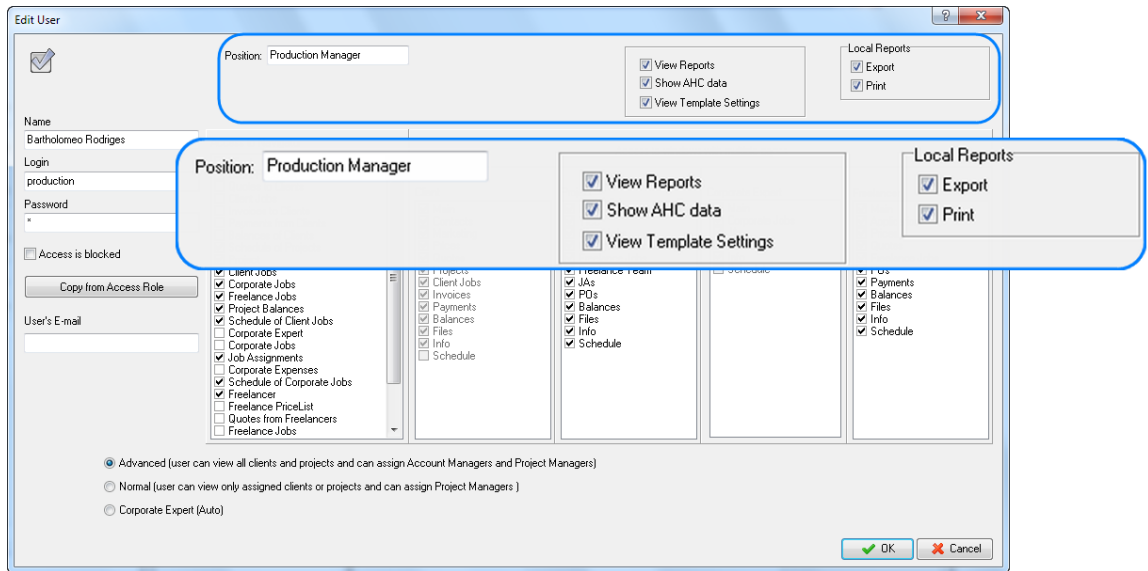
**Login** field stores user name, used to log in to Projex.

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

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

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

**User's E-mail** field is used to enter e-mail address to which all the automatic e-mail notifications for this user will be sent.



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

**View Reports** - select this check box to permit current user access to custom reports in *Projetex Workstation*.

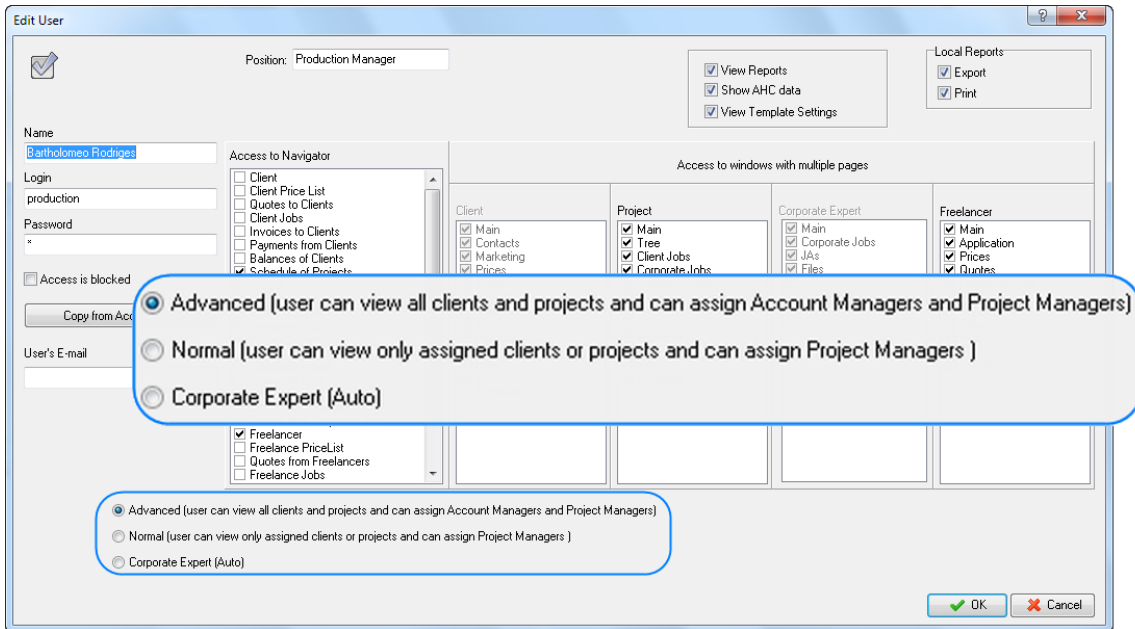
**Show AHC data** - select this check box to permit current user access to *average hourly cost* rates of in-house translators (corporate experts).

**Export** and **Print** options in **Local Reports** block - select proper check boxes to enable export and print operations with local reports for current user.

**View Templates Settings** - select this check boxes to enable editing **Templates Settings** located in **Corporate Settings** for current user.




## Access rights

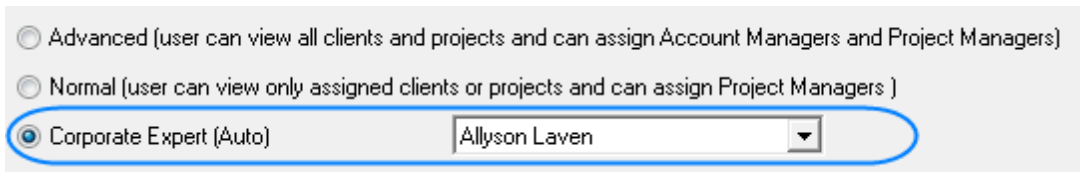


Each user can have one of three general access levels:

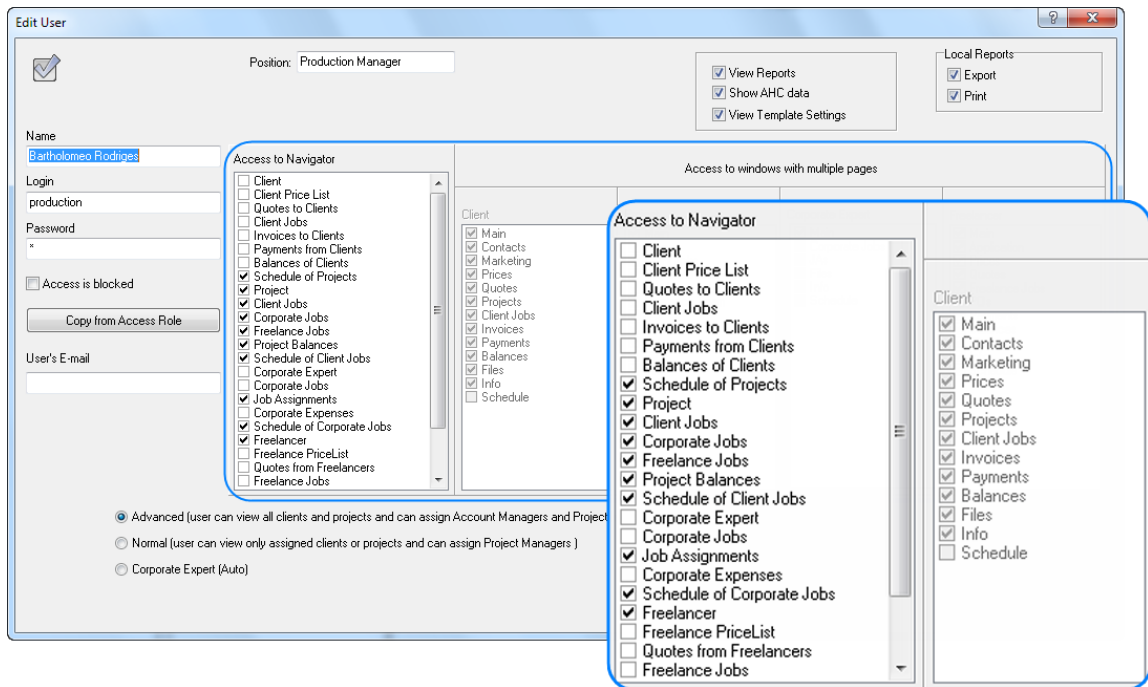
- **Advanced** is the highest access level possible. Users with advanced access level can view all clients and projects in the database. These users can also assign account managers and project managers. Advanced access level users can also create client accounts.
- **Normal** access level permits a user to view only assigned clients and projects. Thus, if a normal access level user is not a project manager of a project, or not an account manager of this client's account, he or she cannot view this project.

 **Note:** This access level is recommended for project managers.

- **Corporate Expert (Auto)**. This would disable **Access to Navigator** options and enable special mode for this user when only expert jobs and job assignments of this particular expert will be displayed. If this option is selected for a certain user, **Projex** will display a drop-down list containing names of the corporate experts added to database. Selected expert will be associated with this user profile.



## Access to Various Areas of Projetex Workstation



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

Select or clear check boxes in **Access to Navigator** field to grant or deny access to particular icons of navigation menu (and therefore windows of the **Projetex Workstation**).

Selecting **Client**, **Project**, **Corporate Expert** and **Freelancer** checkboxes under **Access to Navigator** header will activate **Client**, **Project**, **Corporate Expert** and **Freelancer** areas under **Access to windows with multiple pages** header, representing respective windows in **Projetex Workstation**.

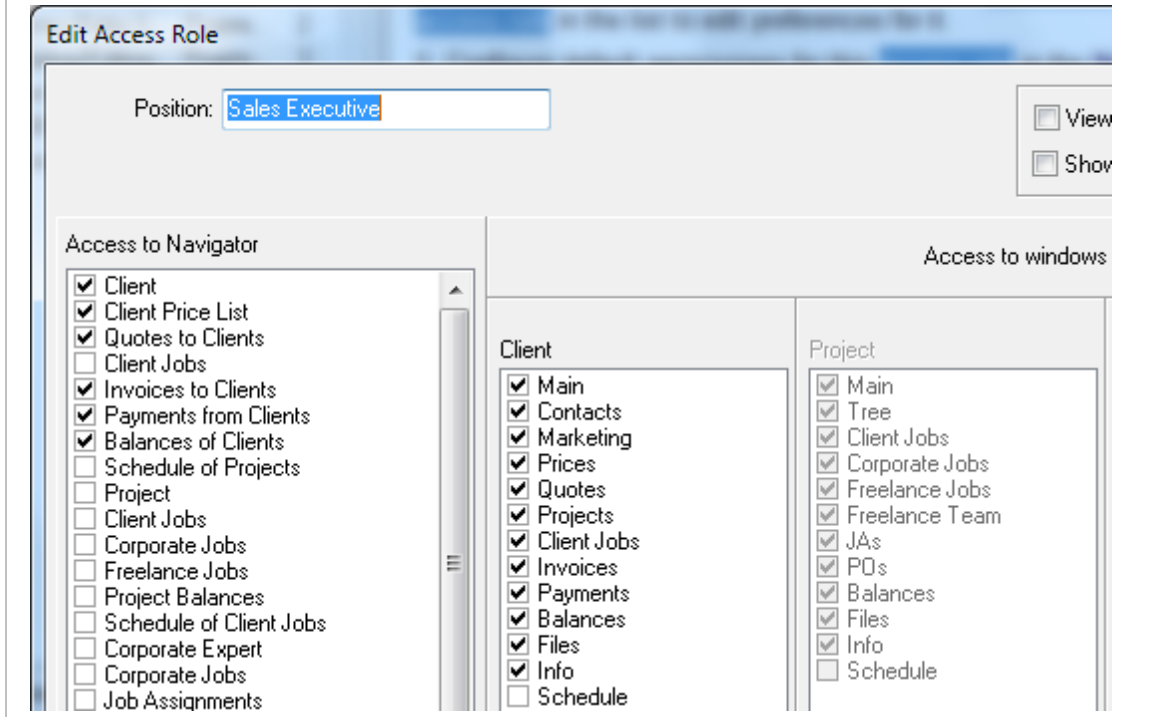
Select or clear check boxes in **Access to windows with multiple pages** fields to grant or deny access to respective windows in **Projetex Workstation**.

### Creating/Editing Access Role

Access roles are presets of access rights which can be quickly assigned to new user accounts. To create or modify an access role:

1. Run **Projetex Server Administrator**.
2. Click **Corporate Settings** tab.
3. Click **Access Roles**.
4. Click **New** or **Edit** button to create a new user access role or modify an old one. Also you can double-click any access role in the list to edit preferences for it.
5. Configure default permissions for this access role in the **New/Edit Access Role** window.

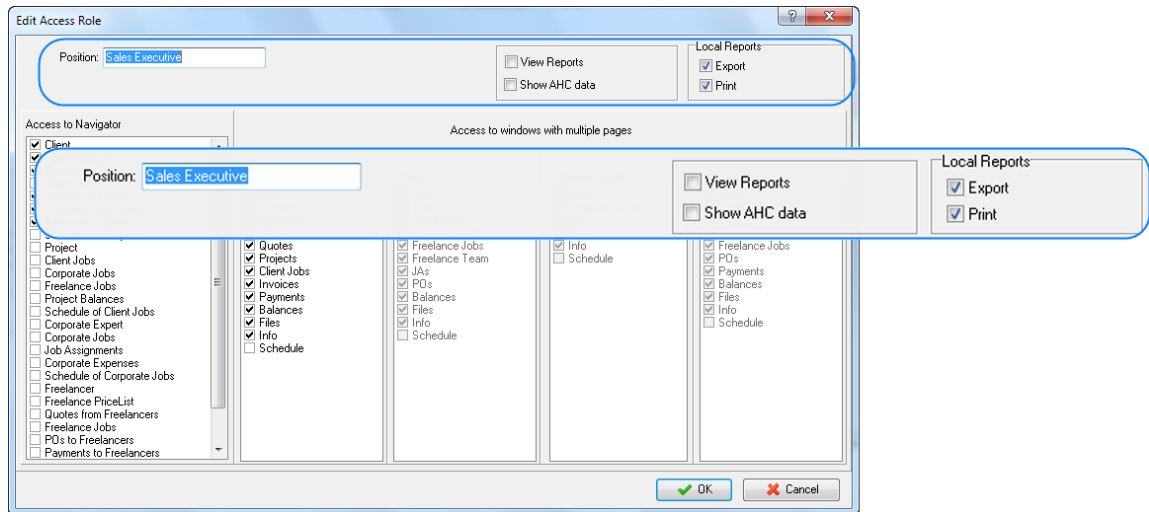
**Example:**



**New/Edit Access Role Window**

In this window access roles can be configured.

**General information**



**Position** field contains description of user's position. Position field does not affect any actual access rights.

**View Reports** - select this check box to permit current user access to custom reports in Projtex

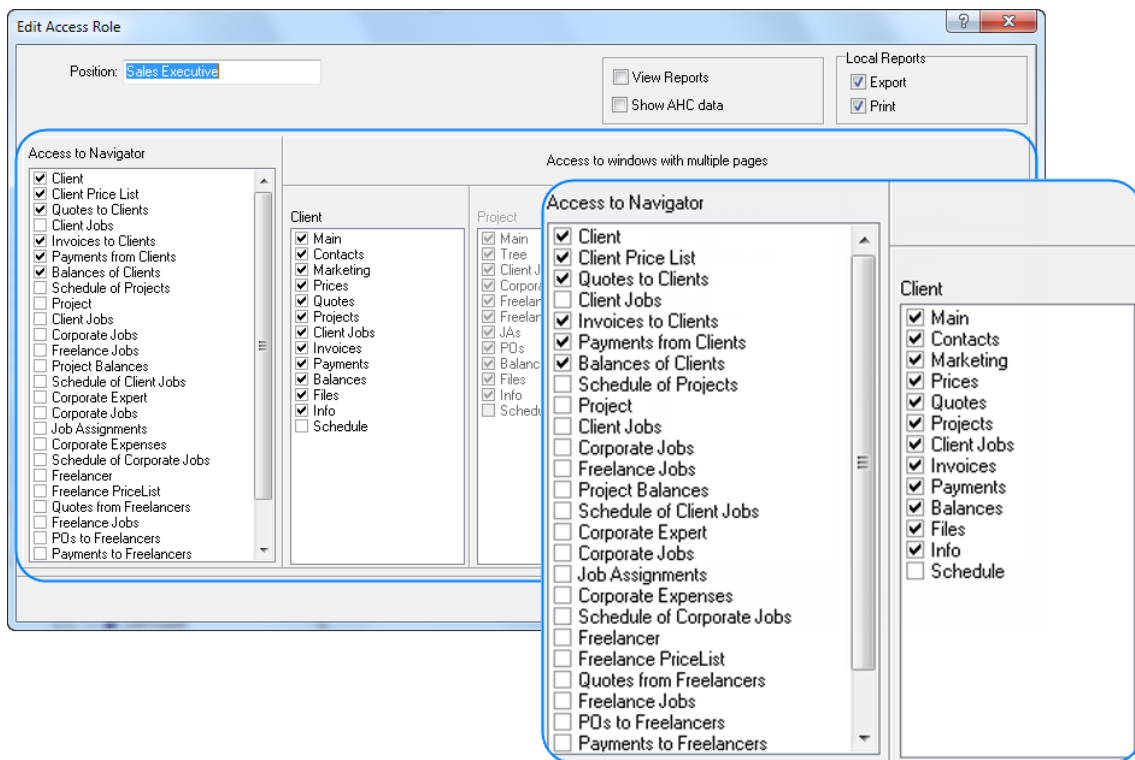
Workstation.

**Show AHC data** - select this check box to permit current user access to *average hourly cost* rates of in-house translators (corporate experts).

**Export** and **Print** options in **Local Reports** block - select proper check boxes to enable export and print operations with local reports for current user.

**View Template Settings** - select this check boxes to enable editing **Template Settings** located in **Corporate Settings** for current user.

## Access to Various Areas of Projetex Workstation



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

Select or clear check boxes in **Access to Navigator** field to grant or deny access to particular icons of navigation menu (and therefore windows of the **Projetex Workstation**).

Selecting **Client**, **Project**, **Corporate Expert** and **Freelancer** checkboxes under **Access to Navigator** header will activate **Client**, **Project**, **Corporate Expert** and **Freelancer** areas under **Access to windows with multiple pages** header, representing respective windows in **Projetex Workstation**.

Select or clear check boxes in **Access to windows with multiple pages** fields to grant or deny access to respective windows in **Projetex Workstation**.

## ODBC access in Projetex

Database of [Projetex](#) can be accessed through ODBC.

The [ODBC \(Open Database Connectivity\)](#) of the Microsoft Corporation represents a general interface for access to SQL-compatible databases. [SQL language](#) is used as a standard mechanism for data access.

The interface ensures a high degree of interaction: one application can refer to different SQL-compatible [DBMS \(Data Base Management System\)](#) by means of generic code. This allows a developer to create and distribute “client/server” applications without taking into consideration characteristics of specific DBMS.

[ODBC](#) driver is required to connect an application with any [DBMS](#). Although [ODBC](#) is considered to be a good [data transfer interface](#), nevertheless, it has a number of restrictions as a program interface.

### Enabling ODBC access

To enable ODBC access, run [Projetex Server Administrator](#) and click **Corporate Settings** tab. Then select **ODBC Access** section of **Corporate Settings**.

Select **ODBC Access** check box and set preferred [ODBC password](#) in the dialog which appears:

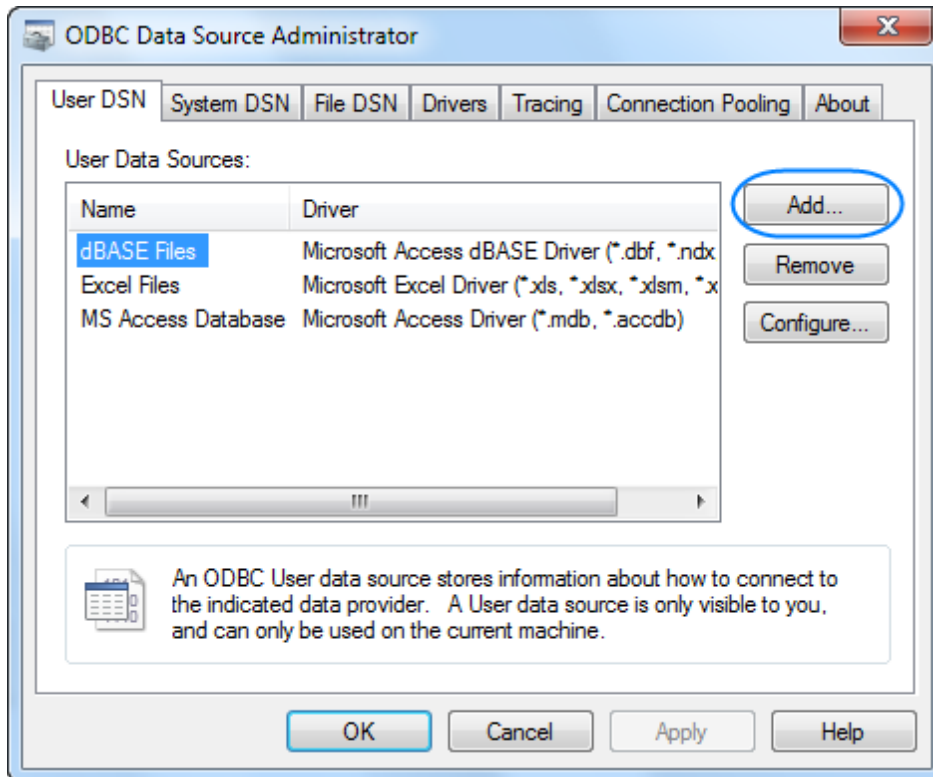
The [ODBC login](#) is “ODBC” and it is fixed.

Download [ODBC driver](#) using the following URL:

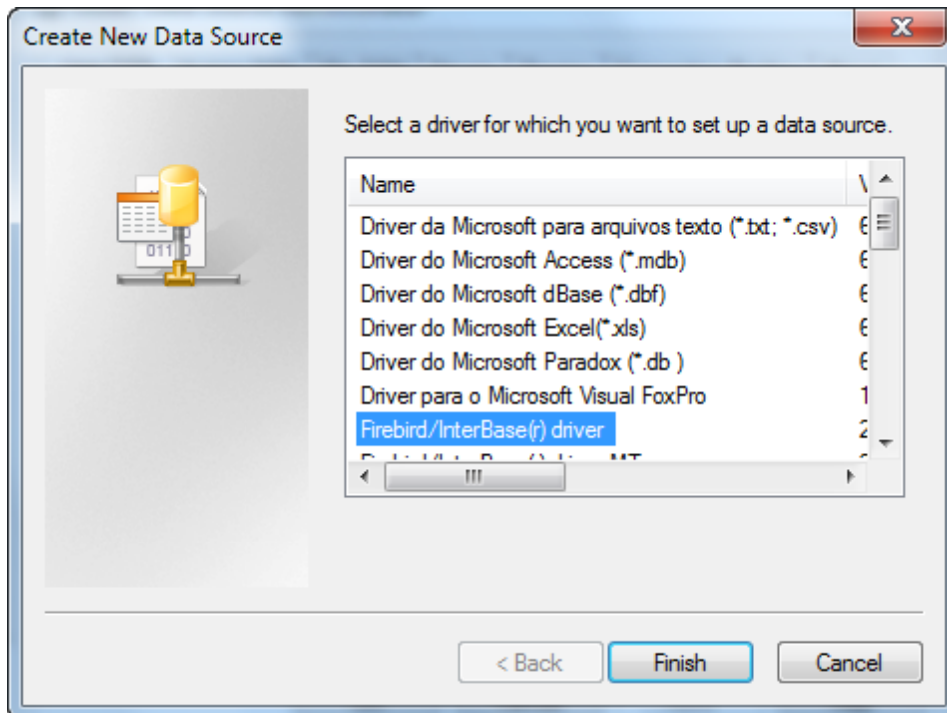
[http://ibphoenix.com/main.nfs?a=ibphoenix&tab=ibp\\_60\\_odbc](http://ibphoenix.com/main.nfs?a=ibphoenix&tab=ibp_60_odbc)

After ODBC driver has been installed, open **Windows Control Panel**, double-click **Administrative Tools** and then double-click **Data Sources (ODBC)** to run **ODBC Data Source Administrator**.

Click the **Add...** button in **ODBC Data Source Administrator** window.



Select the newly downloaded driver for the **Firebird**.



Specify **ODBC** parameters in **FireBird ODBC Setup** window.

- Use the password which you created with the help of [Projetest Server Administrator](#):
- Specify path to *PROJETEX.FDB* in **Database** field. This file is located in [Projetest Server](#) setup folder:

... \Projetest 7.0\Projetest Server\Database\PROJETEX.FDB

- Specify path to fbclient.dll in **Client** field
- Be sure to enter *PROJETEX\_ODBC* in the **Role** field

FireBird ODBC Setup

Data Source Name (DSN): Projetest 8 Datasource

Driver: IscDbc

Description:

Database: C:\Program Files (x86)\AIT\Projetest 8\Projetest Server\Database\Projetest.FDB

Client: C:\Program Files (x86)\AIT\Firebird Server\bin\fbclient.dll

Database Account: ODBC

Password: [Masked]

Role: PROJETEX\_ODBC

Character Set: NONE

Options:

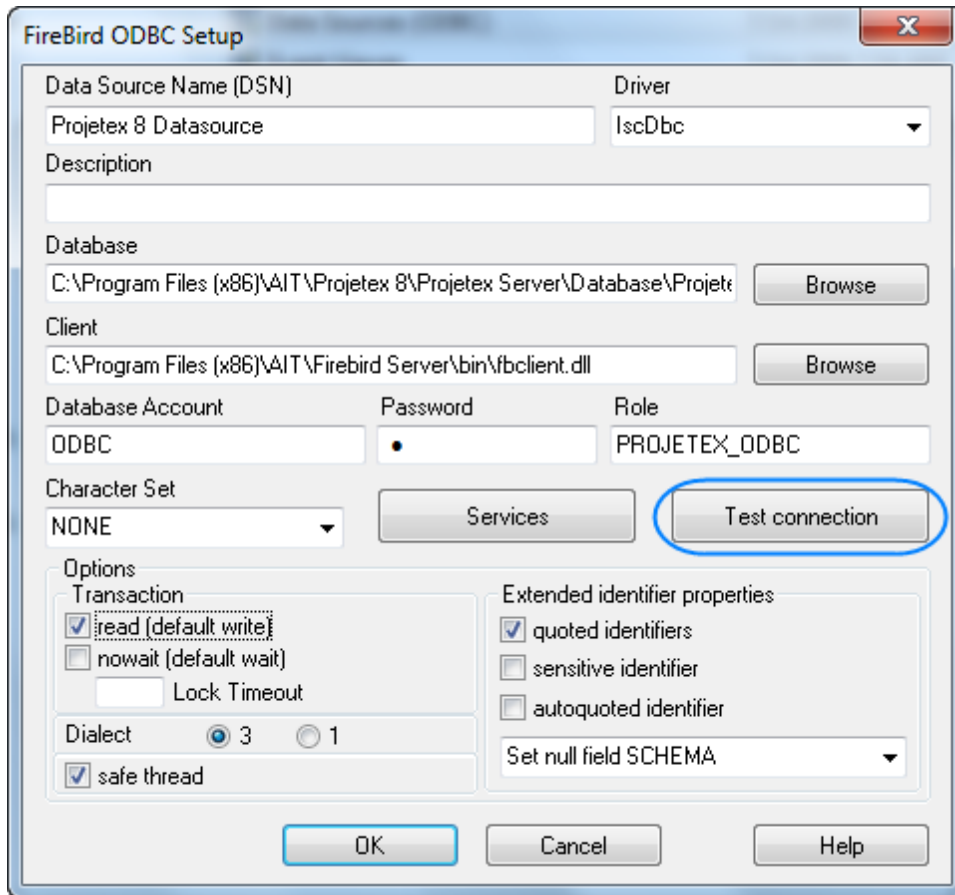
- Transaction:
  - read (default write)
  - nowait (default wait)
  - Lock Timeout: [Empty]
- Dialect:  3  1
- safe thread

Extended identifier properties:

- quoted identifiers
- sensitive identifier
- autoquoted identifier
- Set null field SCHEMA: [Set null field SCHEMA]

Buttons: OK, Cancel, Help

Click **Test connection** button to verify whether all the settings are correct.



 **Note:** If database file has been replaced, run [Projetex Server Administrator](#), open **ODBC Access** section of **Corporate Settings** tab. Clear and select again **ODBC Access** check box.

## 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

*Business* folder contains six folders: *Clients* folder, *Projects* folder, *Experts* folder, *Output* folder, *Templates* folder and *Versions* folder. *Experts* folder consists of two subfolders: *Corporate* and *Freelance*. *Corporate* folder stores corporate experts files; *Freelance* folder — for freelance experts files.

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

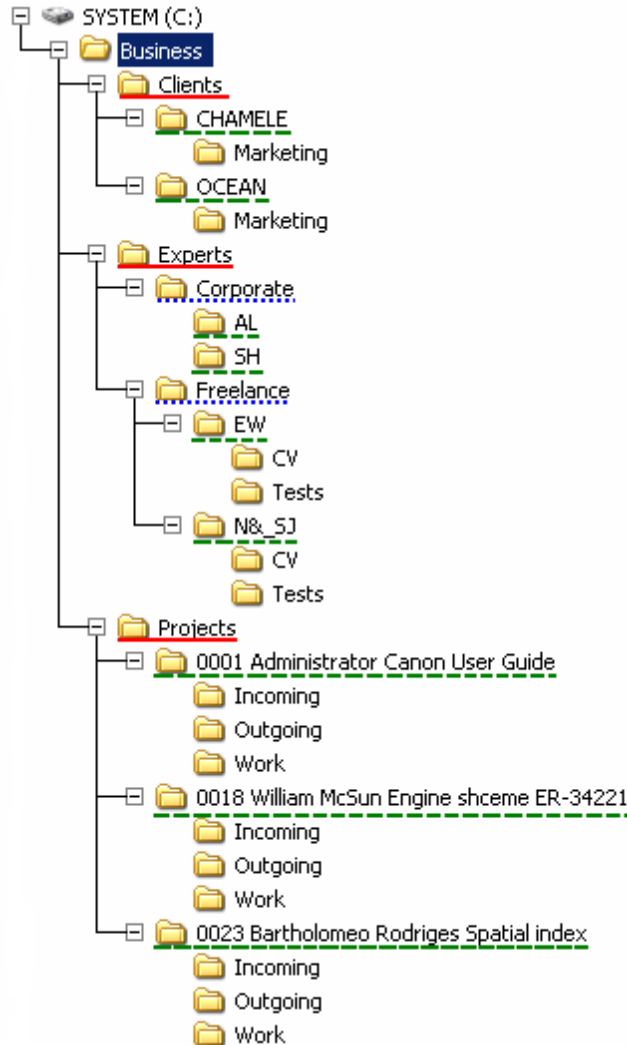
Experts folders (a separate folder is created for each expert) are stored in *Business\Experts\Corporate* and *Business\Experts\Freelance* folders.

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.

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

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

These folders, as well as their subfolders are created automatically when *Projetex Workstation* user clicks **Create** button in respective areas of the program (like **Main** tab of **Project** window). *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 Projtex****Client Folders**

Client folder is a storage location for all files relevant to a particular client. This folder is created with the help of **Main** and **Files** tabs of **Client** window. The following subfolders are created automatically in *Client* folder, depending on the document being saved:

- Prices
- Quotes
- Invoices
- 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 and Freelance)

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


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

In *Corporate Expert's* folder:

- JAs
- Corporate Jobs

In *Freelance Expert'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. Project's folder always contains at least three subfolders:

- *Incoming* (where you can store the files sent you by a client)
- *Work* (where you can store files while working on them)
- *Outgoing* (where you can put files ready to be sent to a client)

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**.

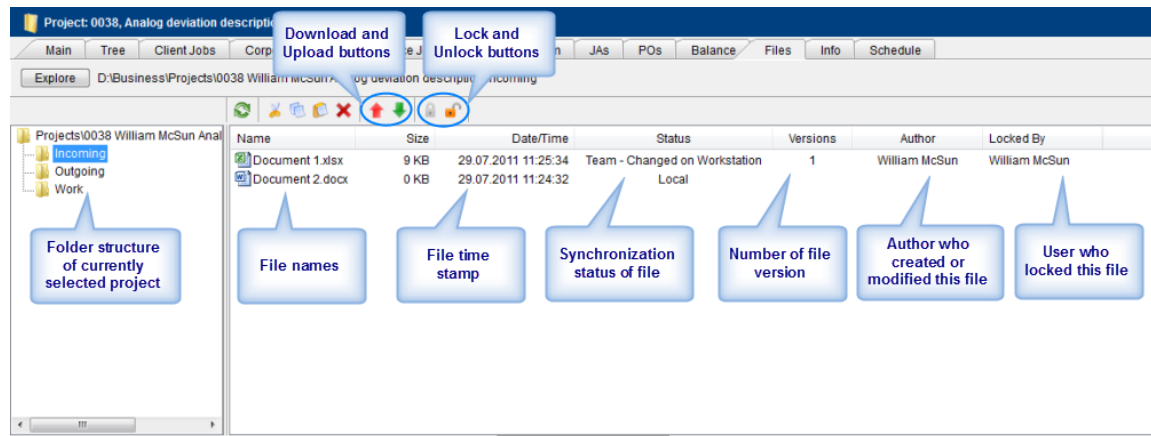
All client jobs are stored in projects' folders, not in clients' folders, because project may contain single client job or multiple client jobs to be completed.

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

**Projotex** 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 **Projotex Workstation**.

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



**Note:** All users running **Projotex 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 such 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 **Projotex Server** PC by right-clicking the file and then clicking **Upload** on the drop-down context menu.

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.

In the case when file was locked accidentally by some user but another user should work with this file, 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 on files locked by the current user. Use **Unlock** button or **Clear Locks** from **Team** menu to unlock such files.

These operations can be performed on **Files** tabs of **Client**, **Project**, **Corporate Expert**, and **Freelancer** windows. The list of files these tabs display includes both local files and files existing on server, as well as files which exist both in *Business* and in *BusinessServer* folders.

 **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:** *Projetex* will check only *locked modified* files which have not been uploaded on server.

## Working with files in *Projetex*

### General Client, Project and Expert Folders windows

General folder windows contain all available folders of certain type:

**Client Folders** — contains folders of all clients in database.

**Project Folders** — folders of all projects can be opened from this window.

**Expert Folders of Corporate Experts** — this folder is used for quick access to all Corporate Expert folders.

**Expert Folders of Freelancers** — use this window to quickly access the folders of all freelancers.

All the general folder windows can be opened using *Projetex* navigation bar. Click any of these icons to open appropriate folder window.

Folders are opened with *Projetex* built-in file manager. Interface of *Projetex* file manager is very much like interface of Windows Explorer with some additional options to enhance the management

of your workflow files.

The structure of specified folder group (*Project* folders in this particular case) is displayed in the form of folder structure tree to the left. Click any of these folders to view its contents in the field to the right.

## Folders of certain Clients, Projects, and Experts

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*. File manager interface in this case has more options, like related folders and FTP access.

**Create** button: if the opened project does not have its folder created yet, click this button to automatically create folder of current project.

**Explore** button: click this button to open currently viewed folder in Windows Explorer window. Once opened, this window can be accessed with the help of **Open Folders** drop-down list.

**Search** button: opens common *Windows search* tool pre-set to search in currently viewed folder.

**Folder address** displays path to currently opened folder. It can be quickly copied to clipboard by double-clicking this string and using context menu to select **Copy** option.

**Common file options** buttons can be used to perform standard operations with selected files and folders.

**Folder structure tree** and **contents of currently selected folder** are identical to those of general folders windows.

## Folder creation options in different *Projetex* windows

Edit windows for quotes, projects, experts, jobs and so on have option for quick folder creation — **Create** and **Explore** buttons.

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.

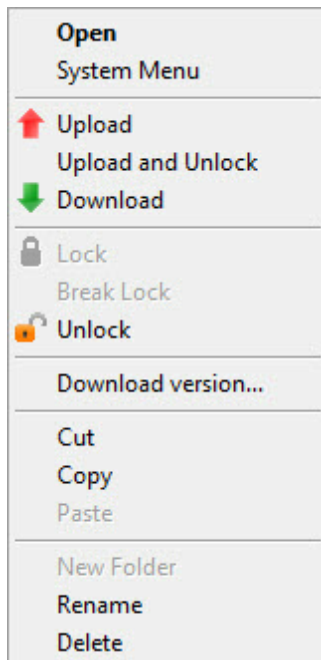
**New Freelance Job (Edit Freelance Job)** — PO folder of related purchase order. Related folders options:

- **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.

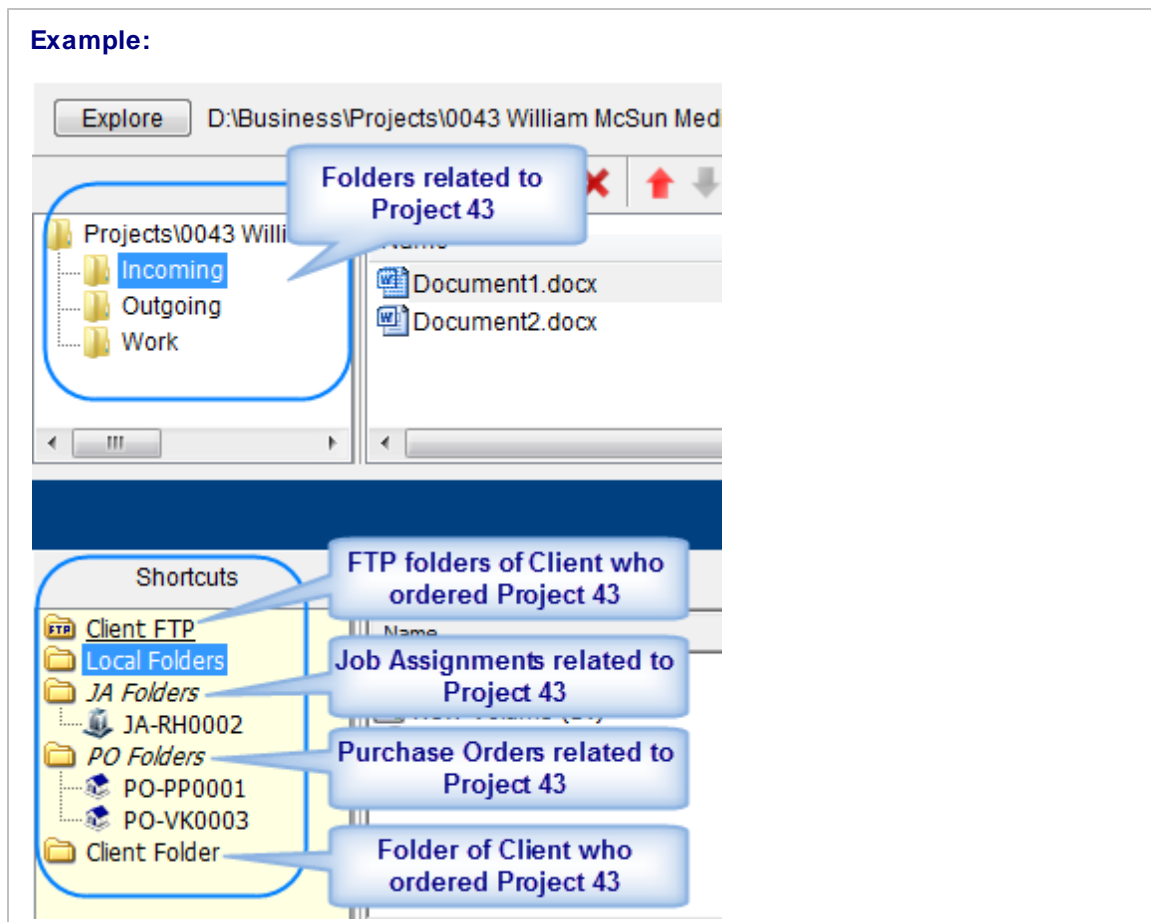
**Rename** - rename a folder.

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

Any option selected in **Shortcuts** list is opened in separate field of **Files** tab:

 **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 **Related Folders** 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 appeared 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 *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.

**Download version** command from context menu opens **File versions** window.

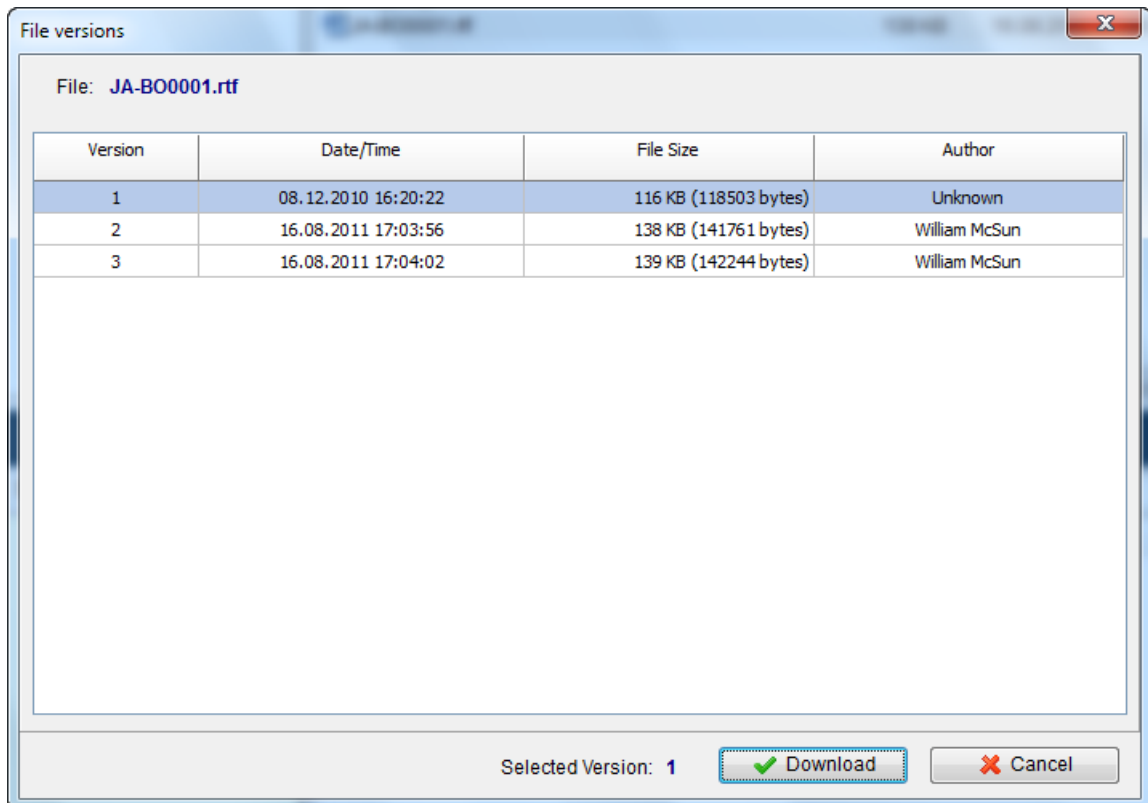


Table of file versions shows the version number, modified date and time, file size and author.

Selecting version and clicking **Download** button will copy the file from *Versions* archive to proper **Client**, **Project**, **Corporate expert** or **Freelancer** folder.

## Mass File Operations

*Projetex* provides the following mass operations with files saved in *Projetex* file system: *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.

## Printed Document Templates

### Templates Basics


All documents issued in **Projetex** can be saved to an *RTF*, *DOC* or *PDF* file, or sent directly to printer. The outlay of the resulting file or printout will be determined by a *template*.

Template is an *RTF* ("Rich Text Format") file which outlay and text format is used when saving **Projetex** documents. *RTF* files can be opened using most text editors, including **MS Word**.

Document templates can be created and edited by user. Each document can have a number of alternate templates.

The following documents can be saved as printable *RTF*, *PDF* and *DOC* files using their own templates:

- Invoices to clients.
- Purchase orders to freelancers.
- Payments from clients summaries.
- Payments to freelancers summaries.
- Projects, client jobs and expert jobs summaries.
- Job assignments to corporate experts.
- Quotes to clients.
- Quotes to freelancers.
- Prices for clients.
- Prices for freelancers.

 **Note:** You can disable access to **Templates settings** for specified users. To disable access to **Templates settings**, go to *Projetex Server Corporate Settings* and click **Users and Access settings**. Then select an user, click **Edit** button and deselect **View Templates Settings** checkbox.

## Saving and Printing Documents

Documents can be saved using windows **Edit Invoice**, **Edit PO**, **Edit Project** and so on, as well as **Prices** tabs of **Client** and **Freelancer** windows, and **General Prices for Clients** and **General prices of Freelancer** windows.

Any window which has **RTF Templates** area can be used to save its data in a printable document. Until the data which you are editing is saved in your database, **RTF Templates** area of document window will look like this:

New Invoice (included client jobs locked, time for linking: 15:00)

From: Advanced International Translations ©  
To: Translation Designs

Date Sent: 12.08.2011  
Code: Auto  
Global Code: ACME-IAuto/2011

Approved (Jobs Locked)  
Attention: Roswell Greenstone

Client Jobs   Adjustments   Payment Method   Linked with Payments   Notes   Custom Fields

Completed	Job Code	Job Name	Client PM	Group of Ser	Service
- No -	J-TDES0003	Int. CRM syst	Roswell Greenst	Editing	Implementing corrections
05.07.2011 1E	J-TDES0002	Int. CRM syst	Roswell Greenst	Editing	Proofreading

Discount/Markup: None (0,00%) 0,00  
Discount/Markup 2: None (0,00%) 0,00  
Tax: None (0,00%) 0,00  
Tax 2: None (0,00%) 0,00

Client Currency: USD  
1 USD = 0,77 EUR

Net Jobs Total: 2400,00

Invoice Total: 2400,00  
Paid: 0,00  
Balance Due: 2400,00

RTF Templates will be available after invoice is entered in database.


    

To save a document, first apply changes made to this document by clicking **Apply** button. Once the document has been saved in database, RTF template controls for it will become active:

RTF Templates: Invoice Template.rtf        

Use **RTF Templates** drop-down list to select the template which must be used for saving this invoice in an RTF file.

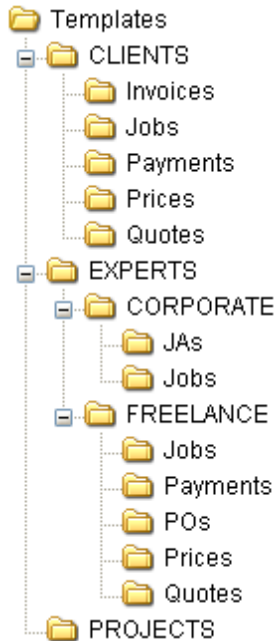
- Click **Save** button to save template in the respective invoice folder.
- Click **Save&Open** button to open this invoice in your default text editor immediately after saving it.
- Click **Print** button to quickly send this invoice to printer.

 **Note:** You can choose to save the output file in *RTF*, *PDF* or *DOC* format by selecting this format in **Save As** window with the help of **Save as type** drop-down list.

## Editing Templates

### Template files

Each document type (like invoices, purchase orders, quotes, and so on) uses templates stored in specific folder, related to certain document type:




By editing template overlay and format, you edit overlay and format of all the documents which will be saved with the help of this template. A number of alternative templates can be created for one document type.

### Opening Templates for Editing

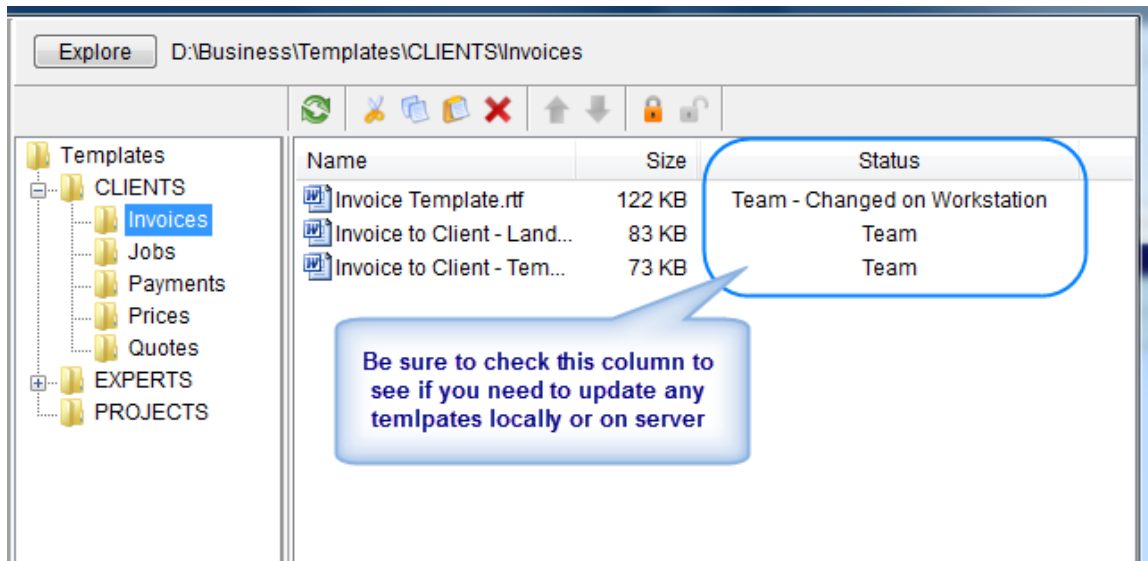
Templates can be downloaded, created, edited and uploaded to server on the **Templates** section of *Projetex Workstation Corporate Settings* window.

To open **Templates** settings:

1. On the **Settings** menu of *Projetex Workstation* click **Corporate** command.
2. On the **Corporate Settings** window click **Templates** area.
3. Navigate template folders to locate required template.
4. Open template file in text editor (*MS Word* or any other editor supporting RTF format).
5. After making all the necessary changes, save **Template** in the same or new RTF file of the same folder.

 **Note:** When you open a template file for editing, you open your local copy of that template. Any changes you make will be valid for your *Projetex Workstation* only, unless you choose to upload or

update template on server.



## Template Variables


Variable is a certain symbol combination which is entered in template files. When a document is saved using template, Projex recognizes the variable and inserts required data in the resulting document.

Variables are indicated with "\" (backslash) symbols in the beginning and in the end,

### Example:

```
\CLIENT_NAME\, \CLIENT_STREET1\, \CLIENT_PHONE1\
```

Each variable represents a portion of data which will be inserted in its place when the document is saved.

 **Note:** Template can be edited without changing the variables wording and outlay (fonts and colors can still be changed).

Advanced users can learn about templates variables; add/delete them as necessary, customizing templates to the maximum.

## Logic and Syntax of Templates

### Variables

All variables and commands can be identified by \ (*backslash*) symbol in the beginning and in the end. Variables display data, extracted from **Projex** database, and relevant to each particular saved document.



**Example:**

In example below you can see `\CLIENT_NAME\`, `\CLIENT_STREET1\` and `\CLIENT_PHONE1\` variables, along with some static text:

To: `\CLIENT_NAME\`

Address: `\CLIENT_STREET1\`

Phone: `\CLIENT_PHONE1\`


When you use this template by clicking on **Save** or **Print** in some dialog box, `\CLIENT_NAME\` variable will be replaced by name of currently *client*, valid to this particular document, `\CLIENT_STREET1\` — by *client's street address* and `\CLIENT_PHONE1\` — by *client's phone number*. The final output will look like this:

To: XYZ Company

Address: Elm Street, 1

Phone: +1 212 898 11 31

Variables like `\INVOICE_CODE\` will display code of currently saved invoice, variables like `\INVOICE_DATE\` will display issue date of current invoice, and so on.

 **Note:** Numerical values sometimes are surrounded by `fnum` command. This command simply tells the parser to round up the value to specified number of digits after decimal point (2 digits in the example below).

**Example:**

Job Total: `\fnum(dtLinkJobs:TOTAL, 2)\`

## Data Scan commands

Another of RTF templates is **Data Scan** commands. These are used to create tables in which number of rows is determined by the number of records in database.

1. Begin by entering `\scan(dtLinkJobs)\` command. This must not necessarily be `dtLinkJobs`, depending on the template, this can be:


- `\scan(dtLinkJobs)\` — in *invoices*, *job assignment* and *PO* templates, to display jobs included in invoice, *JA* or *PO*.
- `\scan(dtLinkInvoices)\` — in *payment* templates to display invoices linked to the payment.
- `\scan(dtLinkPayments)\` — in *invoice* and *PO* templates to indicate linked sums.

2. Insert table header between `\scan(dtLinkJobs)\` and `\scanentry\`.

3. Insert one row of data-columns after `\scanentry\`. Every variable in table must be preceded with `dtlink` command. For instance if the table begins with `\scan(dtLinkJobs)\`, each variable must have

this link included: `\dtLinkJobs:JOB_NAME\`, `\dtLinkJobs:COMPLETED\`, and so on.

4. Insert `\endscan\` after data-columns.

 **Note:** Use `noeof` to hide table's header and footer if the table body appears to be empty. For instance, if your *invoice* includes only *jobs* and no *expenses*, the header and footer for *expenses* will not be saved/printed.

#### Example:

```
\scan:dtlinkJOBS\
PO No.           Job Name
\scanentry\
\dtlinkJobs:PO\  \dtlinkJobs:JOB_NAME\
\scanfooter\
Jobss Total: \JOBS_TOTAL\
\endscan\
```

Command `\scan(dtLinkJobs)\` will make the parser scan (go from first record to the last one) all selected data in **Jobs** table (in this particular case all *jobs* included in the *invoice*) and output them to file or printer.

Text between `\scan(dtLinkJobs)\` command and `\scanentry\` command is table header.

Text between `\scanfooter\` and `\endscan\` commands will be considered table footer and will only be displayed once at the end of this table.

Text between `\scanentry\` and `\scanfooter\` commands is table "body". It includes variables from columns which must be listed in the table. In example above these are:

- `\dtLinkJobs:PO\` – PO Number.
- `\dtLinkJobs:COMPLETED\` – Date of job delivery.
- `\dtLinkJobs:JOB_NAME\` – Name of the job.
- `\dtLinkJobs:SERVICE\` – Service provided.

## Condition checking

This allows the template to react to certain varying conditions and produce output suitable to each of possible conditions. The logic is the following `\IF(condition)\ Reaction \ENDIF\`.

#### Example:

If *Discount 1* is applied, display *discount name*, *discount value* and *subtotal*. The code is as follows:

```
\IF(DISCOUNT1)\
\DISCOUNT1NAME\: \DISCOUNT1VALUE\
Subtotal: \AFTERDISCOUNT1\\\endif\
```

This will make the template check if discount 1 is applied, and if so — display data between `\IF(...)\` and `\ENDIF\` commands.

- `DISCOUNT1` is a logical variable, i.e. it can have one of two values: either true or false. In this particular case, Projetex sets `DISCOUNT1` into true if first discount is present and into false, if there is no first discount.
- When `\IF(DISCOUNT1)\` is encountered in template, parser checks `DISCOUNT1` logical value, and if it is true, runs the code below this command, until `\endif\` is encountered, which instructs parser to stop. If `DISCOUNT1` is false, everything until `\endif\` command is skipped.
- In this particular case, without `\IF(DISCOUNT1)\` command, the parser would output empty string with: and empty **Subtotal**: in cases when there would not be discount. But with `\IF(DISCOUNT1)\` command, in such cases above block is skipped in its entirety.

### Arithmetic calculations syntax

Arithmetic can be performed in templates with the following syntax:

```
\((JOBS_TOTAL+100-10)*10)/2\
```

- The whole expression must be included in backslashes;
- All arithmetic operations must be defined by the following symbols + - / \*;
- The brackets inside backslashes must be positioned by the rules of arithmetic.

### Logical operations syntax

Logical operations: `&&` (and), `||` (or), `!` (not), can be performed in templates with the following syntax:

```
\IF( (table1:field1>b+1) || (table1:field1=0) )\
.....
\ENDIF\
```

## Advanced commands and functions


Format of *IF-ELSIF-ELSE-ENDIF* construction is:

```
\If(Condition1)\
Reaction1
```

```

\elseif(Condition2)\
Reaction2
\else\
Reaction3
\endif\

```

 **Note:** `\if` and `\endif` are the mandatory commands in this construction, `\elseif` and `\else` are an optional commands. Condition must be a variable with boolean value. Such variables can have only two values: True or False.

### Example:

Invoice template	Explanation
<pre> \If(INV_IS_PAID)\ Invoice is paid \else\ Invoice is not paid \endif\ </pre>	<p>If the invoice is paid(INV_IS_PAID=True),then Invoice is paid</p> <p>is displayed in produced invoice, if invoice is not paid (INV_IS_PAID=False), then Invoice is not paid</p> <p>is displayed in produced invoice.</p>

or

Invoice template	Explanation
<pre> \scan(dtLinkJobs)\ ..... \scanentry\ ..... \If(INV_IS_PAID)\ Invoice is paid \elseif(DTLINKJOBS: CJOB_ISCOMPLETED=tr </pre>	<p>If the invoice is paid(INV_IS_PAID=True),then Invoice is paid is displayed in produced invoice,</p> <p>if invoice is not paid(INV_IS_PAID=False), then, if (DTLINKJOBS:CJOB_ISCOMPLETED=true),</p>

<pre> ue)\ Invoice is not paid \else\ Job is not completed \endif\  \scanfooter\ ..... \endscan\ </pre>	<p>then Invoice is not paid is displayed in a produced invoice,</p> <p>if invoice is not paid(INV_IS_PAID=False) and if (DTLINKJOBS:CJOB_ISCOMPLETED=false),then</p> <p>Job is not completed is displayed in a produced invoice.</p>
---	--

## IIF function

Function **IIF** returns one of the two values depending on the value of a logical expression. The syntax is: **IIF(Logical\_expr, Value1, Value2)**

Invoice template	Explanation
<pre> \scan(dtLinkJobs)\ ... \scanentry\ ... \IIF(DTLINKJOBS: CJOB_ISCOMPLETED=true,1 00,0)\ ... \scanfooter\ ... \endscan\ </pre>	<p>If the Client Job is completed (DTLINKJOBS: CJOB_ISCOMPLETED=true) then 100.00 is displayed in a produced invoice. If the Client Job is not completed (DTLINKJOBS: CJOB_ISCOMPLETED=false), then 0.00 is displayed in a produced invoice.</p>

## Numeric report functions.

**ROUND** - The **Round** function rounds a real-type value to an integer-type value. 0.5 is always processed to largest integer number. This is not a banker's rounding.

Invoice template	Explanation
<code>\Round(JOBS_TOTAL)\</code>	<p>If Jobs Total is 504.49, then 504 is displayed in a produced invoice,</p> <p>If Jobs Total is 504.50, then 505 is displayed in a produced invoice.</p>

**INT** - The **INT** function returns the integer part of a real number.

Invoice template	Explanation
<code>\Int(JOBS_TOTAL)\</code>	<p>If Jobs Total is 504.49, then 504 is displayed in a produced invoice,</p> <p>If Jobs Total is 504.51, then 504 is displayed in a produced invoice.</p>

## SUM function

Function **SUM** can be used after `\scan(dtLinkJobs)`, `\scan(dtLinkInvoices)` or `\scan(dtLinkPayments)` to give to some new custom variable the value of sum of the values in the defined field. The syntax is:

```
\scan(table1)\
```

```
\endscan, sum(field of the table1, variable1)\
```

```
Total: \variable1\
```

Invoice template	Explanation
<pre>\scan(dtLinkJobs)\ \endscan, sum (DTLINKJOBS: CJOB_TOTAL, V1)\  Total: \V1\</pre>	<p>Variable V1 is set to return the sum of client job totals anywhere in this invoice, just by entering <code>\V1\</code> anywhere below in this invoice. If there are two client jobs in this invoice with totals of 345.00 and 678.00, then</p> <p>Total: 1023.00 will be displayed in a produced invoice.</p>

## CTN function

Function **CTN** can be used after `\scan(dtLinkJobs)`, `\scan(dtLinkInvoices)` or `\scan(dtLinkPayments)` to give to some new custom variable the value of number of data field entries with values  $\neq 0$ . The syntax is:

```
\scan(table1)\
\endscan, ctn(field of the table1, variable1)\
Total: \variable1\
```

Invoice template	Explanation
<pre>\scan(dtLinkJobs)\ \endscan, ctn (DTLINKJOBS: CJOB_TOTAL, V1)\ Number of Client Jobs: \V1\</pre>	<p>Variable V1 is set to return the number of client jobs with totals that are <math>\neq 0</math> anywhere in this invoice, just by entering <code>\V1\</code> anywhere below in this invoice. If there are three client jobs in this invoice with totals of 345.00, 678.00 and 901.00, then</p> <p>Number of Client Jobs: 3.00 will be displayed in a produced invoice.</p>

## NORESET option with SUM and CTN functions

**NORESET** option can be used with **SUM** and **CTN** functions to add the new values of the source field to the previous result of the function. The syntax is:

```
\scan(table1)\
.....
\endscan, sum(field of the table1, variable1)\
\scan(table2)\
.....
\endscan, sum(field of the table2, variable1,noreset)\
All totals: \variable1\
```

Invoice template	Explanation
<pre>\scan(dtLinkJobs)\ \endscan, sum(DTLINKJOBS: CJOB_TOTAL, V1)\ \scan(DTLINKPAYMENTS)\</pre>	<p>Variable V1 is set to return the sum of client job totals plus payment totals anywhere in this invoice, just by entering <code>\V1\</code> anywhere below in this invoice. If there are two client jobs in this invoice with totals of 345.00 and 678.00 and</p>

```
\endscan, sum(DTLINKPAYMENTS:
CPAYM_TOTAL, V1,noreset)\
Total: \V1\
```

one payment with total of 77.00 , then  
Total: 1100.00 will be displayed in a  
produced invoice.


## Locale Settings And Date Format

Locale format determines the format of dates, decimal numbers, currency volumes in the resulting document. If your clients or freelancers work in different countries their locale format is very likely to be different. To make templates display correct date and time format, correct digit grouping or decimal separator symbols, and so on, configure locale settings and set the desired format.

There are two ways of configuring locale format:

1. In [Projetex Workstation](#) (for each client and freelancer individually):

- open **Client** window and click **Main** tab;
- click **Locale Format** button in client profile;
- select **Custom locale** in the drop-down list next to **Generation of RTF files:** string;
- configure the code in **Short Date Format** or **Long Date Format** to include 4-5 capital M letters (like dd.MMMM.YYYY).

 **Note: Long Date Format** is being used for "long" date variables: `\DATE_DUE_LONG\`, `\INVOICE_DATE_LONG\`, and so on. Settings in **Short Date Format** will affect regular variables, like `\DATE_DUE\`, `\INVOICE_DATE\`, and so on.

2. In [Windows Control Panel](#) (these settings are used as default in [Projetex](#)):

- open [Windows Control Panel](#)
- double-click **Regional and Language Options**
- click **Customize** button on **Regional Options** tab
- click **Date** tab
- configure long (or short) date format options to include 4-5 capital M letters (like dd.MMMM.YYYY). To remove day of the week from view, delete extra "d" letters, so that no more than 2 "d-s" are present in the code string.

## Templates Storage and Management

In [Projetex](#) all templates are stored in subfolders of [Templates](#) folder in centralized [BusinessServer](#) folder on server. In order to work with a template, you will need to download a local copy, or create new local template which later can be uploaded to server.



To manage templates:

1. On the **Settings** menu click **Corporate**.
2. On the **Corporate Settings** click **Templates**.

Templates are stored in different folders, each determining a type of document, this template is meant for. Any RTF file located in that folder will be recognized by **Projetex** as a template for the document that folder represents.

#### Example:

An RTF file *anyname.rtf*, located at *D:\BusinessServer\Templates\CLIENTS/Invoices/* will be recognized by as an invoice template. It will appear in the **RTF Templates** drop-down list of **Edit Invoice** window.

Only local template files, located in local *Business* folder (by default *D:\BusinessServer*) can be used to save documents. Templates stored in centralized *BusinessServer* folder are meant for sharing and updating templates on **Projetex Workstation**. Thus when you open a template file for editing, you open your local copy of that template. Any changes you make will be valid for your **Projetex Workstation** only, unless you choose to upload or update template on server.

## Templates synchronization

After templates have been uploaded to server, they will update on all local *Business* folders automatically. Such new template will be uploaded to local *Business* folders after a user will choose this template from **RTF Templates** drop-down list and click **Save**, **Save&Open** or **Print** button.

## Available Templates Variables

### Common Template Variables

The following variables can be used in all of the **Projetex** templates.

#### User Information Variables

Code to paste to template	Information to be displayed in the saved document
\COMPANY_NAME\	Name of registered company (i.e. your company name) taken from your License Key. This name cannot be modified, however you can delete this variable from template and type your preferred name directly.
\COMPANY_PAYMENT_TERMS\	Payment terms set for freelance experts. Can be changed on <b>Corporate Settings</b> tab of <b>Projetex Server Administrator</b> .

\COMPANY_PAYMENT_TERMS_NOTES\	Notes, entered for payment terms to freelance experts. Can be changed on <b>Corporate Settings</b> tab of <a href="#">Projex Server Administrator</a> .
\COMPANY_CURRENCY\	Base currency of your company. Can be changed on <b>Corporate Settings</b> tab of <a href="#">Projex Server Administrator</a> .
\CURRENT_USER_NAME\	Name of the <a href="#">Projex Workstation</a> user, who saved (printed) document. Can be changed on <b>Corporate Settings</b> tab of <a href="#">Projex Server Administrator</a> .
\CURRENT_USER_POSITION\	Position of the <a href="#">Projex Workstation</a> user, who saved (printed) document. Can be changed on <b>Corporate Settings</b> tab of <a href="#">Projex Server Administrator</a> .

#### Date Variables

Code to paste to template	Information to be displayed in the saved document
\DATE\	Date in short format. <b>Example:</b> 10/4/2006
\DATE_LONG\	Date in long format. <b>Example:</b> Monday, October 04, 2006

#### Client Template Variables

Client variables refer to clients, connected with the document. For example, in the invoice template \CLIENT\_NAME\ variable will return the name of client, to whom the invoice was issued. This data can be changed on the **Main** tab of **Client** window.

#### Client Data Template Variables

Code to paste to template	Information to be displayed in the saved document
\CLIENT_NAME\	Name of client.
\CLIENT_CODE\	Client Code of client.

\CLIENT_CURRENCY\	Client's currency.
\CLIENT_PAYMENT_TERMS\	Payment terms of a client.  <b>Example:</b>  Within 30 days
\CLIENT_MINFEE\	Minimum fee set in payment terms of a client.
\CLIENT_PAYMENT_TERMS_NOTES\	Text, entered in the <b>Additional Notes</b> field of client's payment terms.
\CLIENT_ADDRESS\	Complete address of client. Order of different elements can be changed on <b>Corporate Settings</b> tab of <b>Projetex Server Administrator</b> .
\CLIENT_STREET1\	Street address of a client (entered into the upper <b>Street Address</b> field).
\CLIENT_STREET1_C\	Street address of a client, followed by a comma (not displayed if <b>Street Address</b> field is empty).
\CLIENT_STREET2\	Alternate/second street address of a client (entered into the lower <b>Street Address</b> field).
\CLIENT_STREET2_C\	Alternate/second street address of a client, followed by a comma (not displayed if <b>Street Address</b> field is empty).
\CLIENT_CITY\	Client's city of residence.
\CLIENT_CITY_C\	Client's city name, followed by a comma (not displayed if <b>City</b> field is empty).
\CLIENT_STATE\	Client's state/province of residence.
\CLIENT_STATE_C\	Client's state/province, followed by a comma (not displayed if <b>State</b> field is empty).
\CLIENT_COUNTRY\	Client's country of residence.
\CLIENT_COUNTRY_C\	Client's country of residence, followed by a comma (not displayed if <b>Country</b> field is empty).
\CLIENT_ZIP\	Client's ZIP code.
\CLIENT_ZIP_C\	Client's ZIP code, followed by a comma (not displayed if <b>ZIP Code</b> field is empty).
\CLIENT_EMAIL1\	E-mail address of a client.

\CLIENT_EMAIL2\	Additional e-mail address of a client.
\CLIENT_PHONE1\	Phone number of a client.
\CLIENT_PHONE2\	Additional phone number of client.
\CLIENT_PHONE3\	Additional phone number of client.
\CLIENT_PHONE4\	Additional phone number of client.
\CLIENT_FAX\	Fax number of client.
\CLIENT_WEB\	Web site address of client.
\CLIENT_MINFO\	Text, entered in <b>Marketing Notes</b> section on the <b>Marketing</b> tab of <b>Client</b> window.
\CLIENT_MWEB\	Text, entered in <b>Marketing Link</b> section on the <b>Marketing</b> tab of <b>Client</b> window.
\CLIENT_INFO\	Text, entered in <b>Additional Information</b> section on the <b>Main</b> tab of <b>Client</b> window.
\CLIENT_VATNUM\	VAT code of a client.

## Project Template Variables

Code to paste to template	Information to be displayed in the saved document
\PROJECT_NAME\	Name of project.
\PROJECT_CODE\	Project code.
\PROJECT_CLIENT_NAME\	Client project created for.
\PROJECT_CLIENT_CODE\	Client reference number.
\PROJECT_INFO\	Information about the project.
\CORPORATE_PM_NAME\	Corporate project manager
\CLIENT_PM_NAME\	Client project manager
\PROJECT_DATE_STARTED\	Date when project was started in following format: 10/4/2006.
\PROJECT_DATE_DEADLINE\	Project deadline in following format: 10/4/2006.
\PROJECT_DATE_COMPLETED\	Date of project completion in following

	format: 10/4/2006.
\PROJECT_DATE_STARTED_LONG\ 	Date when project was started in following format: Monday, October 04, 2006.
\PROJECT_DATE_DEADLINE_LONG\ 	Project deadline in following format: Monday, October 04, 2006.
\PROJECT_DATE_COMPLETED_LONG\ 	Date of project completion in following format: Monday, October 04, 2006.

### Contact Template Variables

Code to paste to template	Information to be displayed in the saved document
\SALUTATION\ 	Salutation of contact.  <b>Example:</b> Mr., Ms., Mrs.
\TITLE\ 	Contact title.
\CONTACT_NAME\ \PM_NAME\ \ATTENTION\ 	Contact name.
\CONTACT_EMAIL1\ 	Contact email address.
\CONTACT_EMAIL2\ 	Contact email address 2 (if available).
\CONTACT_PHONE1\ 	Contact phone number.
\CONTACT_PHONE2\ 	Contact phone number 2 (if available).
\CONTACT_FAX\ 	Contact fax number.
\CONTACT_NOTES\ 	Contact notes.

### Quote Template Variables

#### Common Quote Variables

Code to paste to template	Information to be displayed in the saved document
---------------------------	---

\QUOTE_NAME\ \QUOTE_CODE\ \CODE\ \SERVICE\ \REQUEST\ \ANSWER\ \VOLUME\ \PRICING\ \TYPE\ \PRICE\ \UNITS\ \TOTAL\ \DATE_SENT\ \SENT\ \DATE_SENT_LONG\ \LONGSENT\ \START\ \ESTSTART\ \START_LONG\ \LONGESTSTART\ \COMPLETION\ \ESTCOMPLETION\ \LONG_COMPLETION\ \LONGESTCOMPLETION\ \COUNT_NOTES\ \STATUS\ 	Possible quote name. Quote code. Service name. Request for quote. Answer to request for quote. Quote volume. Quote pricing type (per unit, flat fee, and so on). Quote price. Quote units. Quote total. Date sent in following format: 10/4/2006 Date sent in following format: Monday, October 04, 2006 Date assigned in following format: 10/4/2006 Date assigned in following format: Monday, October 04, 2006 Deadline date in following format: 10/4/2006 Deadline date in following format: Monday, October 04, 2006 CATCount notes. Status of quote (unknown, accepted, rejected)
--	---

The following variables refer to draft client jobs, added to quote to client. These variables do not apply to freelancer quotes.

**Draft Client Job variables for Quotes to Clients**

Code to paste to template	Information to be displayed in the saved document
\DTMULTIQUOTEITEMS:QI_NAME\	Name of draft client job.
\DTMULTIQUOTEITEMS:GROUP_NAME\	Group of services of draft client job.
\DTMULTIQUOTEITEMS:SERV_NAME\	Service name of draft client job.
\DTMULTIQUOTEITEMS:UNIT_NAME\	Units in which draft client job volume is specified.
\DTMULTIQUOTEITEMS:QI_PRICE\	Price of draft client job.
\DTMULTIQUOTEITEMS:QI_VOLUME\	Volume of draft client job.
\DTMULTIQUOTEITEMS:QI_FEE_KIND\	Type of price set for client job (can be per unit, flat fee, or free).
\DTMULTIQUOTEITEMS:QI_TOTAL\	Draft client job total.
\DTMULTIQUOTEITEMS:QI_COUNTNOTES\	CATCount notes of draft client job (if job volume had been entered with the help of CATCount).

**Client Job Template Variables**

Code to paste to template	Information to be displayed in the saved document
\JOB_NAME\	Job name.
\JOB_CODE\ \CODE\	Job code.
\PO_CODE\ \PO\	Purchase order client issued for this job.
\CLIENT_REF\	Client reference number in accounting system of client.
\SERVICE\	Service name.
\INSTRUCTIONS\	Job instructions.
\WORK_NOTES\	Work notes.
\VOLUME\	Job volume.
\TYPE\	Job type (for example: per unit, flat fee, free)

\PRICE\ \UNITS\ \TOTAL\ \ASSIGNED\ \ASSIGNED_LONG\ \LONGASSIGNED\ \DEADLINE\ \DEADLINE_LONG\ \LONGDEADLINE\ \COMPLETED\ \DONE\ \COMPLETED_LONG\ \LONGCOMPLETED\ \COUNT_NOTES\ \INVOICE_CODE\ \INVOICE\ \INVOICE_GLOBAL_CODE\ \INV_GLOBAL\ 	Job price. Job units. Job total. Date when job was assigned in following format: 10/4/2006. Date when job was assigned in following format: Monday, October 04, 2006. Job deadline in following format: 10/4/2006. Job deadline in following format: Monday, October 04, 2006. Completion date in following format: 10/4/2006. Completion date in following format: Monday, October 04, 2006. CATCount or AnyCount notes. Invoice code. Invoice global code.
--	---

### Corporate Job Template Variables

Code to paste to template	Information to be displayed in the saved document
\CEXPERT_NAME\ \CEXPERT_CODE\ \CEXPERT_EMAIL1\ \CEXPERT_EMAIL2\ \CEXPERT_PHONE1\ 	Name of employee. Code of employee. Employee email 1. Employee email 2. Employee phone number 1.



\CEXPERT_PHONE2\	Employee phone number 2.
\CEXPERT_FAX\	Employee fax number.
\CEXPERT_AHC\	Employee average hourly cost.
\CEXPERT_INFO\	Employee information.
\JOB_NAME\	Job name.
\JOB_CODE\	Job code.
\CLIENT_PO\	Purchase order client issued for this job.
\CLIENT_REF\	Client reference number in accounting system of client.
\JA_CODE\	Job Assignment code.
\SERVICE\	Service name.
\INSTRUCTIONS\	Job instructions.
\WORK_NOTES\	Work notes.
\VOLUME\	Job volume.
\TYPE\	Job type (for example: per unit, flat fee, free)
\AHC\	Average hourly cost of the expert job is assigned to.
\PRICE\	Job price.
\UNITS\	Job units.
\TOTAL\	Job total.
\ASSIGNED\	Date job was assigned in following format: 10/4/2006.
\ASSIGNED_LONG\	Date job was assigned in following format: Monday, October 04, 2006.
\DEADLINE\	Job deadline in following format: 10/4/2006.
\DEADLINE_LONG\	Job deadline in following format: Monday, October 04, 2006.
\COMPLETED\	Completion date in following format: 10/4/2006.

\COMPLETED_LONG\ \	Completion date in following format: Monday, October 04, 2006.
\TIME_SPENT\ \	Time spent on job completion.
\HOURS_SPENT\ \	Hours spent on job completion.
\MINUTES_SPENT\ \	Minutes spent on job completion.
\COUNT_NOTES\ \	CATCount or AnyCount notes.
\INVOICE_CODE\ \	Invoice code.
\JOB_QUALITY\ \	Quality of completed jobs (set by project manager).
\NET_JOBS_TOTAL\ \	Net jobs total number.
\NETJOBSTOTAL\ \	

### Freelance Job Template Variables

Code to paste to template	Information to be displayed in the saved document
\FEXPERT_NAME\ \	Name of freelance expert.
\FEXPERT_CODE\ \	Freelance expert code.
\FEXPERT_CURRENCY\ \	Freelance expert currency.
\FEXPERT_MINFEE\ \	Freelance expert minimum fee.
\FEXPERT_PAYMENT_TERMS\ \	Freelance expert payment terms.
\FEXPERT_PAYMENT_TERMS_NOTES\ \	Freelance expert payment terms additional notes.
\FEXPERT_ADDRESS\ \	Freelance expert address.
\FEXPERT_STREET1\ \	Freelance expert street 1.
\FEXPERT_STREET2\ \	Freelance expert street 2.
\FEXPERT_CITY\ \	Freelance expert city.
\FEXPERT_STATE\ \	Freelance expert state.
\FEXPERT_COUNTRY\ \	Freelance expert country.
\FEXPERT_ZIP\ \	Freelance expert zip code.
\FEXPERT_EMAIL1\ \	Freelance expert email address.
\FEXPERT_EMAIL2\ \	Freelance expert email address 2.

\FEXPERT_PHONE1\	Freelance expert phone number 1.
\FEXPERT_PHONE2\	Freelance expert phone number 2.
\FEXPERT_PHONE3\	Freelance expert phone number 3.
\FEXPERT_PHONE4\	Freelance expert phone number 4.
\FEXPERT_FAX\	Freelance expert fax number 2.
\FEXPERT_WEB\	Freelance expert Web site address.
\FEXPERT_AINFO\	Freelance expert application information.
\FEXPERT_INFO\	Freelance expert general information.
\FEXPERT_VATNUM\	Freelance expert VAT number.
\JOB_NAME\	Job name.
\JOB_CODE\	Job code.
\PO_CODE\	Purchase order client issued for this job.
\PO_GLOBAL_CODE\	Purchase order client issued for this job global code.
\CLIENT_REF\	Client reference number in accounting system of client.
\SERVICE\	Service name.
\INSTRUCTIONS\	Job instructions.
\WORK_NOTES\	Work notes.
\VOLUME\	Job volume.
\TYPE\	Job type (for example: per unit, flat fee, free)
\PRICE\	Job price.
\PRICING\	Fee type.
\UNITS\	Job units.
\TOTAL\	Job total.
\ASSIGNED\	Date job was assigned in following format: 10/4/2006.
\ASSIGNED_LONG\ \LONGASSIGNED\	Date job was assigned in following format: Monday, October 04, 2006.
\DEADLINE\	Job deadline in following format:

	10/4/2006.
\DEADLINE_LONG\ \	Job deadline in following format: Monday, October 04, 2006.
\COMPLETED\ \	Completion date in following format: 10/4/2006.
\COMPLETED_LONG\ \	Completion date in following format: Monday, October 04, 2006.
\COUNT_NOTES\ \	CATCount or AnyCount notes.
\JA_CODE\ \	Job assignment code.
\JOB_QUALITY\ \	Quality of completed job (set by project manager).
\NET_JOBS_TOTAL\ \	Net jobs total number.
\NETJOBSTOTAL\ \	

## Invoice Template Variables

### Date and code

Code to paste to template	Information to be displayed in the saved document
\STATUS\ \	Invoice status  <b>Example:</b> Expected within 30 days, Settled 5 days earlier
\DATE_DUE\ \SETTLEMENT_DATE\ \	Date when invoice is due in following format: 10/4/2006
\DATE_DUE_LONG\ \SETTLEMENT_LONGDATE\ \DUE_DATELONG\ \	Date when invoice is due in following format: Monday, October 04, 2006
\INVOICE_DATE\ \INV_DATE\ \	Date invoice sent in following format: 10/4/2006
\INVOICE_DATE_LONG\ \	Date invoice sent in following format:

\INV_LONGDATE\ \INVOICE_CODE\ \INV_CODE\ \INVOICE_GLOBAL_CODE\ \INV_GLOBAL\ \INV_GLOBALLONG\ \NOTES\ \INVOICE_NOTES\ 	Monday, October 04, 2006  Invoice code  Invoice global code  Invoice notes from <b>Notes</b> tab of <b>Edit Invoice</b> window
---	--

**Invoice totals**

Code to paste to template	Information to be displayed in the saved document
\INVOICE_TOTAL\ \INVOICE_TOTAL_BASE\ \JOBS_TOTAL\ \JOBS_TOTAL_B\ \NET_JOBS_TOTAL\ \NET_JOBS_TOTAL_B\ 	Invoice total in client's currency Invoice total in base currency Jobs total in client's currency Jobs total in base currency Jobs total with discounts in client's currency Jobs total with discounts in base currency

**Taxes**

Code to paste to template	Information to be displayed in the saved document
\TAX1\ \TAX1_NAME\ \TAX1_VALUE\ \TAX1_VALUE_B\ \TAX2\ \TAX2_NAME\ 	Indicates if the tax 1 has been added; used in algorithms (If tax 1 exists = True, if it doesn't = False) Tax 1 name Tax 1 value in client's currency Tax 1 value in base currency Used in algorithms (If tax 2 exists = True, if it doesn't = False) Tax 2 name

\TAX2_VALUE\	Tax 2 value in client's currency
\TAX2_VALUE_B\	Tax 2 value in base currency
\TAXES\	Indicates whether the taxes in Tax fields are set; used in algorithms (If any tax is set = True, if it they are not = False)
\AFTER_TAX1\	Total in client's currency after Tax 1 applied
\AFTER_TAX1_B\	Total in base currency after Tax 1 applied

### Discounts

Code to paste to template	Information to be displayed in the saved document
\DISCOUNT1\	Indicates if the discount/markup in the Discount/Markup field is set; used in algorithms (If discount 1 exists = True, if it does not = False)
\DISCOUNT1_NAME\	Discount 1 name
\DISCOUNT1_VALUE\	Discount 1 value in client's currency
\DISCOUNT1_VALUE_B\	Discount 1 value in base currency
\DISCOUNT2\	Indicates if the discount/markup in the <b>Discount/Markup</b> field is set; used in algorithms (If discount 2 exists = True, if it does not = False)
\DISCOUNT2_NAME\	Discount 2 name
\DISCOUNT2_VALUE\	Discount 2 value in client's currency
\DISCOUNT2_VALUE_B\	Discount 2 value in base currency
\DISCOUNTS\	Indicates if the discounts/markups in the <b>Discount/Markup</b> fields are set; used in algorithms (If any discount is set = True, if there are no = False)
\AFTER_DISCOUNT1\	Total in client's currency after Discount 1 applied
\AFTER_DISCOUNT1_B\	Total in base currency after Discount 1 applied
\NET_JOBS_TOTAL\	Jobs total with discounts in client's currency
\NET_JOBS_TOTAL_B\	Jobs total with discounts in base currency

**Payment status variables**

Code to paste to template	Information to be displayed in the saved document
\INVOICE_DUE\	Balance due in client's currency
\INVOICE_DUE_BASE\	Balance due in base currency
\INVOICE_PAID\	Total payments linked to this invoice in client's currency
\INVOICE_PAID_BASE\	Total payments linked to this invoice in base currency
\INV_IS_PAID\	Used in algorithms (If the invoice is paid = True, if it's not = False)
\BEFORE_ADJUSTMENTS\	Invoice total in client's currency, excluding adjustments
\BEFORE_ADJUSTMENTS_B\	Invoice total in base currency, excluding adjustments
\ADJUSTMENTS_VALUE\	Value of the adjustments in client's currency
\ADJUSTMENTS_VALUE_B\	Value of the adjustments in base currency
\ADJUSTMENTS_DESCR\	Description of the adjustments
\INVOICE_PAYMETHOD\	Invoice payment method.
\INVOICE_PAYMETHOD_DESCR\	Payment method description.

**Client Job Variables in Invoice**

Code to paste to template	Information to be displayed in the saved document
\DTLINKJOBS:CJOB_PONUMB\	Client PO of the job
\DTLINKJOBS:CJOB_NAME\	Client job name
\DTLINKJOBS:CJOB_ASSIGNED\	Date the client job was assigned
\DTLINKJOBS:CJOB_DEADLINE\	Deadline of client job
\DTLINKJOBS:CJOB_ISCOMPLETED\	Completed (Boolean: True/False)
\DTLINKJOBS:CJOB_COMPLETED\	Date the client job was completed
\DTLINKJOBS:CJOB_PRICE\	Price of client job

\DTLINKJOBS:CJOB_VOLUME\	Client job volume
\DTLINKJOBS:CJOB_FEE_KIND\	Pricing (per unit, flat fee)
\DTLINKJOBS:CJOB_RATE\	Exchange rate
\DTLINKJOBS:CJOB_TOTAL\	Job total in client's currency
\DTLINKJOBS:CJOB_TOTAL_B\	Job total in base currency
\DTLINKJOBS:CJOB_INSTRUCTION\	Instructions of client job
\DTLINKJOBS:CJOB_WORKNOTES\	Work notes of client job
\DTLINKJOBS:CJOB_COUNTNOTES\	CATCount notes of client job
\DTLINKJOBS:SERV_NAME\	Service name of client job
\DTLINKJOBS:UNIT_NAME\	Volume units of client job
\DTLINKJOBS:PROJ_CODE\	Project code of client job
\DTLINKJOBS:CJOB_CODE\	Client job code
\DTLINKJOBS:CJOB_CLCODE\	Client Ref. of the job
\DTLINKJOBS:CCON_NAME\	Client PM of the client job

## Payment Template Variables

### Basic payments template variables

Code to paste to template	Information to be displayed in the saved document
\PAYMENT_CODE\ \CODE\	Payment code.
\PAYMENT_DATE\ \PDATE\	Date payment received in following format: 10/4/2006
\PAYMENT_DATE_LONG\ \PLONGDATE\	Date payment received in following format: Monday, October 04, 2006
\PAYMENT_NOTES\	Notes about payment.
\TOTAL_PAID\ \TOTAL\	Total paid (in client's currency).
\TOTAL_PAID_BASE\	Total paid (in base currency).
\PAYMENT_RATE\	Exchange rate.





	following format: 10/4/2006
\PO_DATE_LONG\ 	The date when the PO was issued in long format:  Monday, October 04, 2006
\PO_CODE\ 	PO code
\PO_GLOBAL_CODE\ 	PO global code

**PO totals**

Code to paste to template	Information to be displayed in the saved document
\JOBS_TOTAL\ 	Jobs total for the jobs included to the PO in freelancer's currency
\NET_JOBS_TOTAL\ 	Net Jobs Total (Jobs Total after the discounts/markups are applied) in freelancer's currency
\NET_JOBS_TOTAL_B\ 	Net Jobs Total (Jobs Total after the discounts/markups are applied) in base currency
\PO_TOTAL\ 	PO Total value in freelancer's currency
\PO_TOTAL_BASE\ 	PO Total value in base currency

**PO taxes**

Code to paste to template	Information to be displayed in the saved document
\TAX1\ 	Indicates if the tax 1 has been added; used in algorithms (If tax 1 exists = True, if it doesn't = False)
\TAX1_NAME\ 	Tax 1 name
\TAX1_VALUE\ 	Tax 1 value in freelancer's currency
\TAX1_VALUE_B\ 	Tax 1 value in base currency
\TAX2\ 	Indicates if the tax 2 has been added; used in algorithms (If tax 2 exists = True, if it doesn't = False)
\TAX2_NAME\ 	Tax 2 name

\TAX2_VALUE\	Tax 2 value in freelancer's currency
\TAX2_VALUE_B\	Tax 2 value in base currency
\TAXES\	Indicates if the taxes in the Tax fields are set; used in algorithms (If any tax is set = True, if it they are not = False)
\AFTER_TAX1\	Total in freelancer's currency after Tax 1 applied
\AFTER_TAX1_B\	Total in base currency after Tax 1 applied

**PO discounts**

<b>Code to paste to template</b>	<b>Information to be displayed in the saved document</b>
\DISCOUNT1\	Indicates if the discount/markup in the Discount/Markup field is set; used in algorithms (If discount 1 exists = True, if it does not = False)
\DISCOUNT1_NAME\	Discount 1 name
\DISCOUNT1_VALUE\	Discount 1 value in freelancer's currency
\DISCOUNT1_VALUE_B\	Discount 1 value in base currency
\DISCOUNT2\	Indicates if the discount/markup in the Discount/Markup field is set; used in algorithms (If discount 2 exists = True, if it does not = False)
\DISCOUNT2_NAME\	Discount 2 name
\DISCOUNT2_VALUE\	Discount 2 value in freelancer's currency
\DISCOUNT2_VALUE_B\	Discount 2 value in base currency
\DISCOUNTS\	Indicates if the discounts/markups in the Discount/Markup fields are set; used in algorithms (If any discount is set = True, if there are no = False)
\AFTER_DISCOUNT1\	Total in freelancer's currency after Discount 1 applied
\AFTER_DISCOUNT1_B\	Total in base currency after Discount 1 applied
\NET_JOBS_TOTAL\	Jobs total with discounts in freelancer's currency

\NET_JOBS_TOTAL_B\	Jobs total with discounts in base currency
--------------------	--

**PO payment status**

Code to paste to template	Information to be displayed in the saved document
\PO_DUE\	Balance due in freelancer's currency
\PO_DUE_BASE\	Balance due in base currency
\PO_PAID\	Total payments linked to this PO in freelancer's currency
\PO_PAID_BASE\ \TOTAL_PAID_BASE\	Total payments linked to this PO in base currency
\PAYMENT_RATE\	Exchange rate of a payment
\PO_IS_PAID\	Used in algorithms (If the invoice is paid = True, if it's not = False)
\PO_TOTAL\	PO Total value
\PO_TOTAL_BASE\	PO Total in Base currency
\BEFORE_ADJUSTMENTS\ \BEFORE_ADJUSTMENTS_B\	Invoice total in freelancer's currency, excluding adjustments
\ADJUSTMENTS_VALUE\ \ADJUSTMENTS_VALUE_B\	Value of the adjustments in freelancer's currency
\INVOICE_IS_RECEIVED\ \INVOICE_CODE\ \INVOICE_DATE\ \INVOICE_DATE_LONG\ Monday, October 04, 2006	Indicates if the invoice from the expert was received; Boolean type: True if the Expert Invoice received option is selected.
	The code of the expert's invoice
	The date the expert's invoice was received
	The date the expert's invoice was received in long format
\PO_NOTES\ Monday, October 04, 2006	The text entered on the Notes tab of the New/Edit PO window

**PO jobs variables**

Code to paste to template	Information to be displayed in the saved document
\dtLinkJobs:RJOB_NAME\	Name of the job
\dtLinkJobs:RJOB_ASSIGNED\	Date of the job assignment
\dtLinkJobs:RJOB_DEADLINE\	Deadline date of the job
\dtLinkJobs:RJOB_ISCOMPLETED\	Indicates if the job was is completed; Boolean type: True if the job is completed
\dtLinkJobs:RJOB_COMPLETED\	Date of the job completion
\dtLinkJobs:RJOB_PRICE\	Price of the job
\dtLinkJobs:RJOB_VOLUME\	The job volume
\dtLinkJobs:RJOB_FEE_KIND\	Fee type for the job
\dtLinkJobs:RJOB_RATE\	Exchange rate between expert's and base currency
\dtLinkJobs:RJOB_TOTAL\	Job total in freelancer's currency
\dtLinkJobs:RJOB_TOTAL_B\	Job total, in base currency
\dtLinkJobs:RJOB_QUALITY\	Job quality, as specified in the <b>New/Edit</b> Job window
\dtLinkJobs:RJOB_INSTRUCTION\	Text entered on the <b>Instructions</b> tab of the <b>New/Edit</b> Job window
\dtLinkJobs:RJOB_WORKNOTES\	Text entered on the <b>Work Notes</b> tab of the <b>New/Edit</b> Job window
\dtLinkJobs:RJOB_COUNTNOTES\	Text from the <b>Count Notes</b> tab of the <b>New/Edit</b> Job window
\dtLinkJobs:GROUP_NAME\	The job's group of service name
\dtLinkJobs:SERV_NAME\	The job's service name
\dtLinkJobs:UNIT_NAME\	The units the job is measured in.
\dtLinkJobs:PROJ_CODE\	The code of the project the job belongs to.
\dtLinkJobs:RJOB_CODE\	Job code

These variables can add information from linked payments to purchase order template

**Payment PO variables**

Code to paste to template	Information to be displayed in the saved document
<code>\dtLinkPayments:LINK_SUM\</code>	The amount linked with the PO
<code>\dtLinkPayments:PAYM_DATE\</code>	Payment date
<code>\dtLinkPayments:RPAYM_TOTAL\</code>	Payment total value
<code>\dtLinkPayments:RPAYM_CODE\</code>	Payment code

## Custom Queries to Database

### Custom Queries

SQL queries can be made to [Projetex](#) database with administrative access rights. This feature is recommended for system administrators and IT specialists since it requires basic knowledge of SQL.

Structured Query Language (SQL) is a language of structured requests. It is intended for working with relational databases, which constitute the sets of interrelated data, stored in tables.

Nowadays SQL is a part of a large number of programs, executed on various types of computers. "Owing to its elegance and machine independence, as well as to the industrial leaders support in relational base technology, SQL was acknowledged the standard language and will keep this position in the foreseeable future." [2000, Mastering SQL, Martin Grubber]

## Query Building Tutorial

User queries are built and managed with the help of **Custom Queries** section of **Corporate Settings** tab of the **Projtex <%VAERSION%> Server Administrator**.

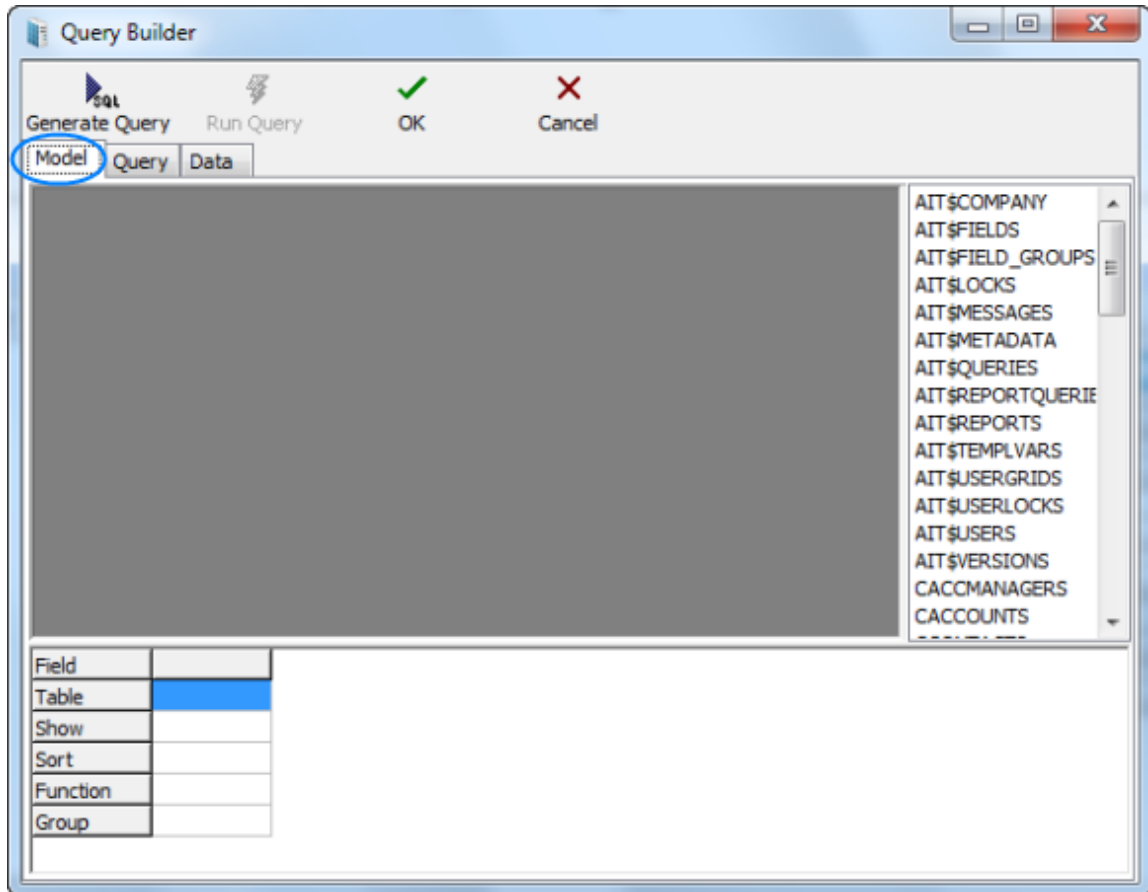
### 1. Beginning creating a query

Click the **New** button and the **Query Builder** window shown below appears. Enter the name of your query in **Query Name** field, and (optionally) description of the new query in the **Description** field.

The screenshot shows the 'Query Builder' window. At the top, there are four buttons: 'Generate Query' (with a SQL icon), 'Run Query' (with a lightning bolt icon), 'OK' (with a green checkmark icon), and 'Cancel' (with a red X icon). Below these buttons are three tabs: 'Model', 'Query', and 'Data'. The 'Query' tab is selected and circled in blue. The main area of the window contains a 'Query Name:' text box (circled in blue), a 'Content:' text area, and a 'Description:' text area (circled in blue).

## 2. Beginning creating the model of the query

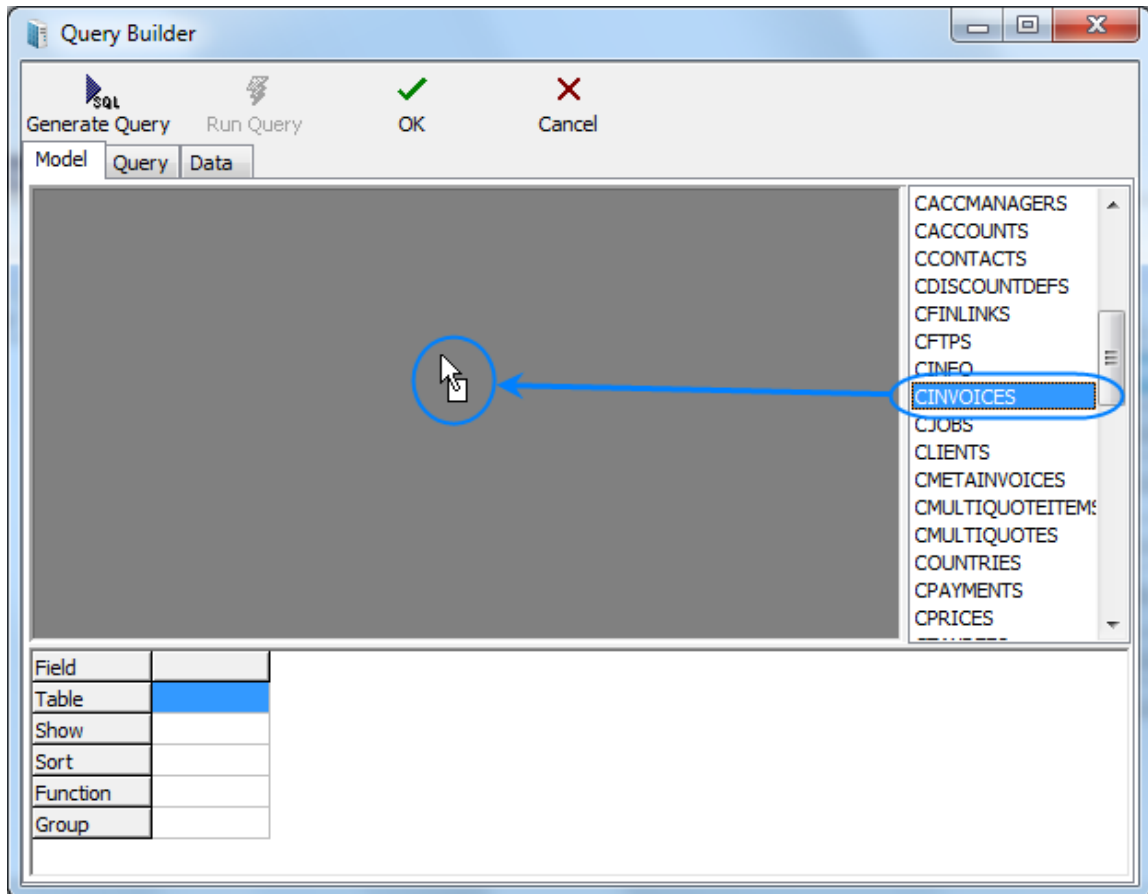
Switch to the **Model** tab:





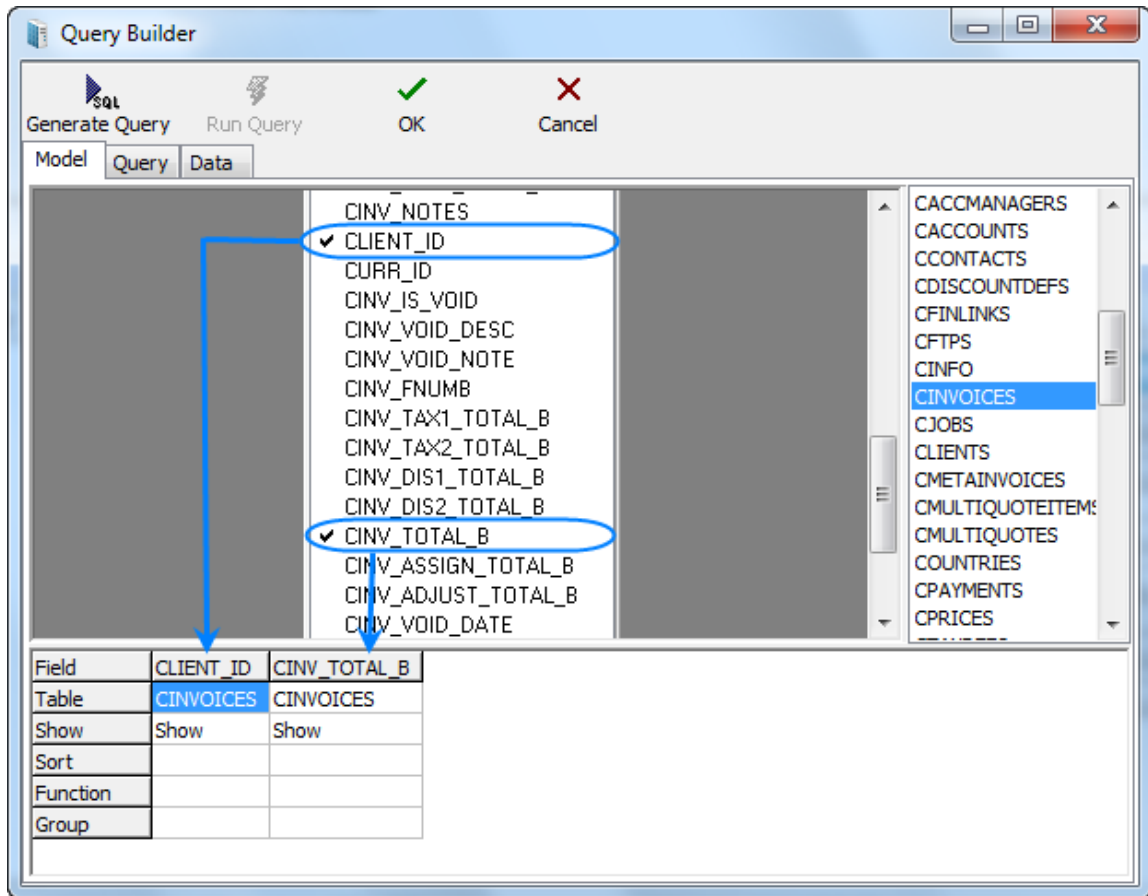
### 3. Selecting database tables

Locate the required tables on the list to the right (in this case — *CINVOICES* table) and drag them to the gray field of the **Model** tab of **Query Builder** window.



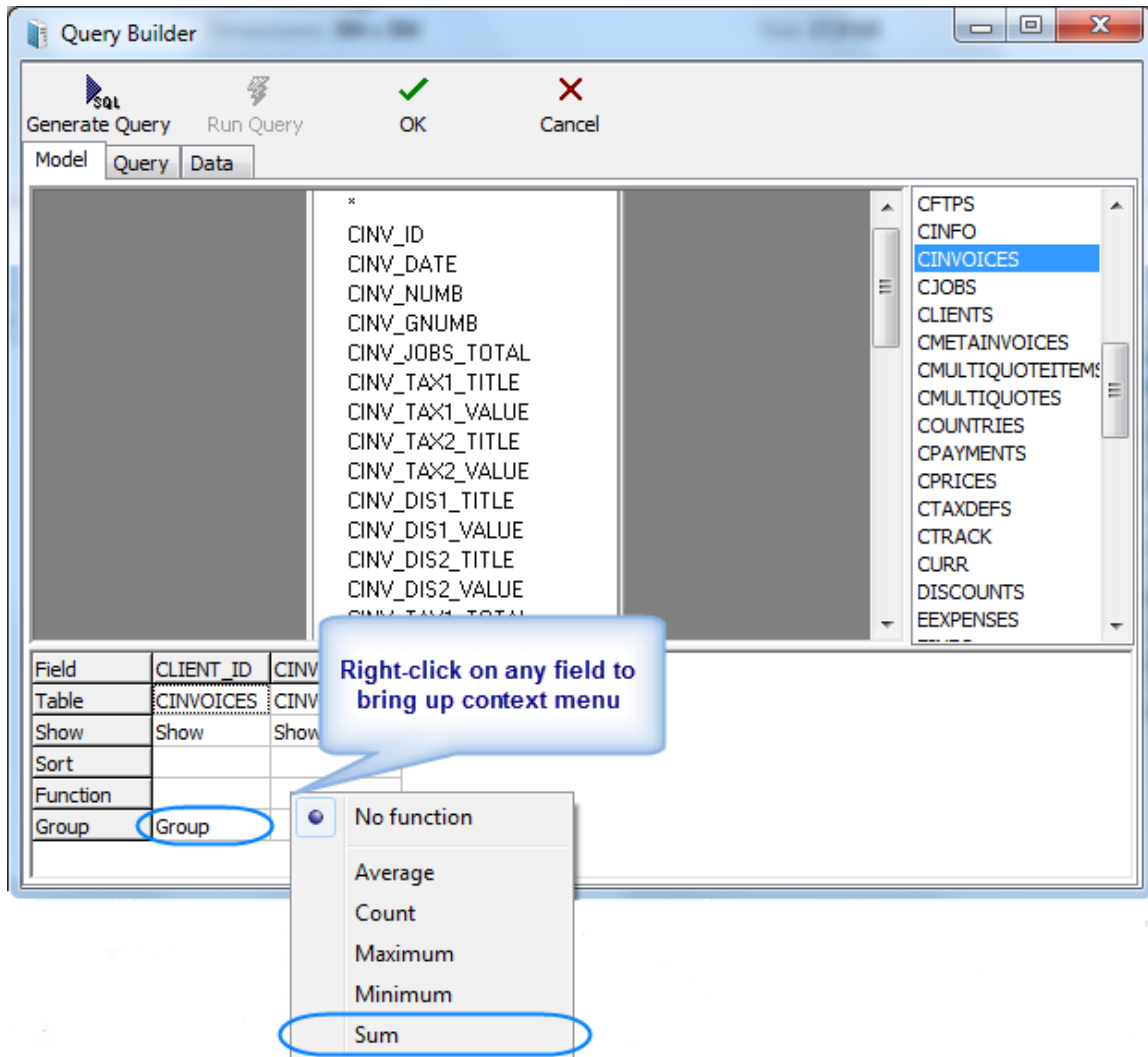
#### 4. Selecting fields to be added to query

Select two fields, (in this case *CLIENT\_ID* and *CINV\_TOTAL\_B* — client ID and sum of the invoice in basic currency) by clicking near the names of this fields in the table windows. These fields will appear in the lower area, which represents the list of selected fields.



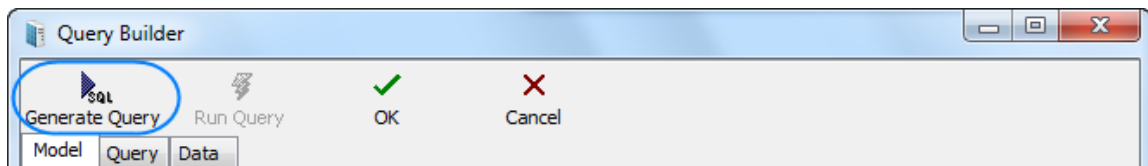
### 5. Assigning functions

Right-click on the cell where fields CLIENT\_ID (the selected field) and GROUP (SQL section Group by) intersect and select the **Group** option. Similarly in the cell of intersecting CINV\_TOTAL\_B and **Function** fields we select the **Sum** option:

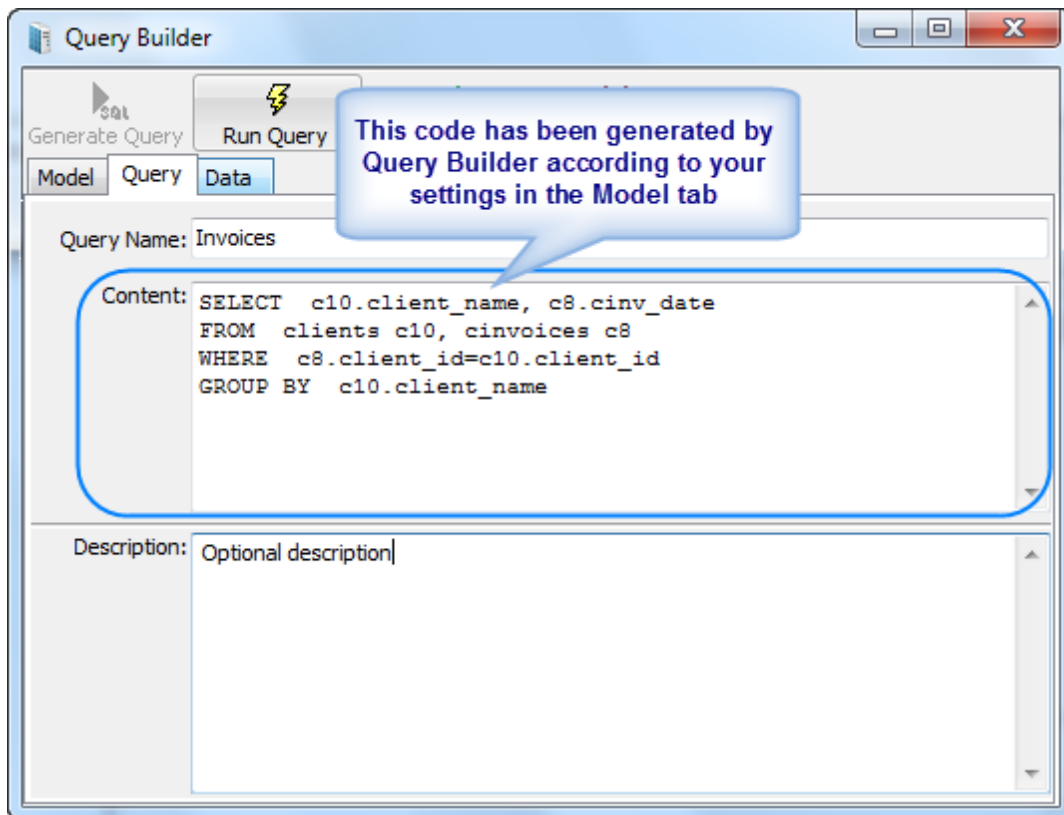


### 6. Generating query

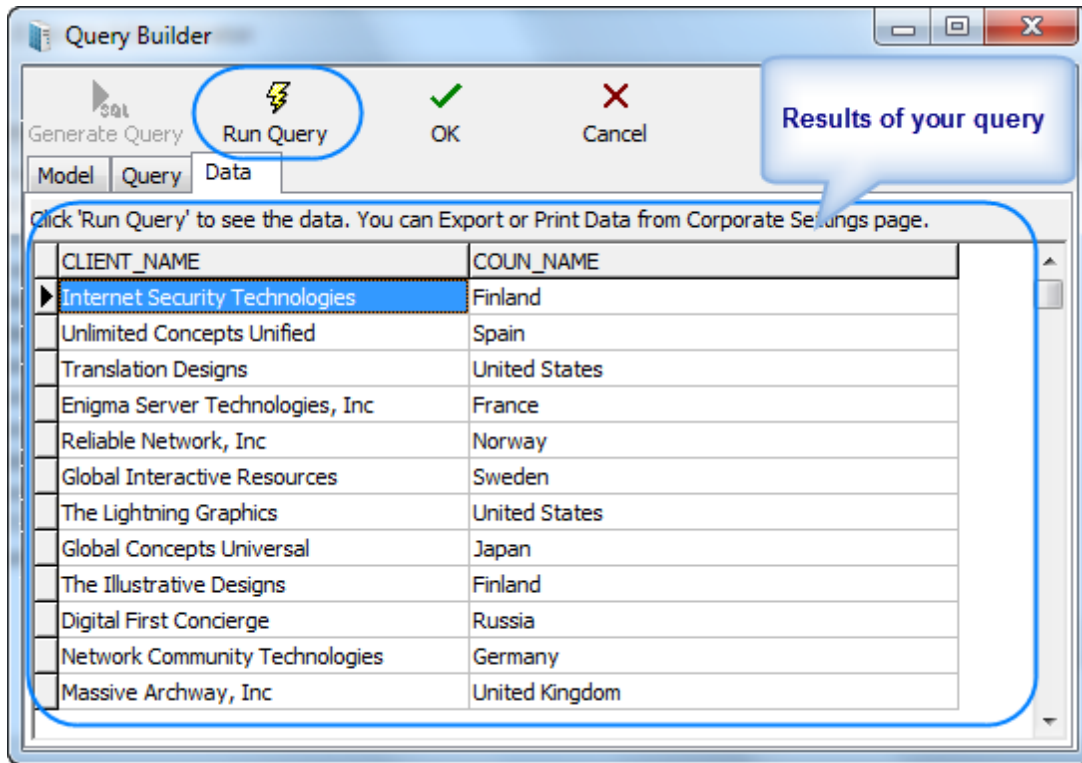
Click the Generate Query button.



Newly built SQL-query will appear.



Start executing the query (clicking **Run Query** button from the toolbar in the upper part of the window) and you will see the results.



**Note:** Although for most basic queries you are not required to write the SQL code of the query manually, any additional code can be added by SQL-versed users to fully customize their queries.

#### Example:

The following strings can be added to this particular query:

```
SELECT FIRST 10 c4.client_id, SUM(c4.cinv_total_b),
(select client_name from clients where client_id = c4.client_id)
FROM cinvoices c4
GROUP BY c4.client_id
ORDER BY 2 DESC
```

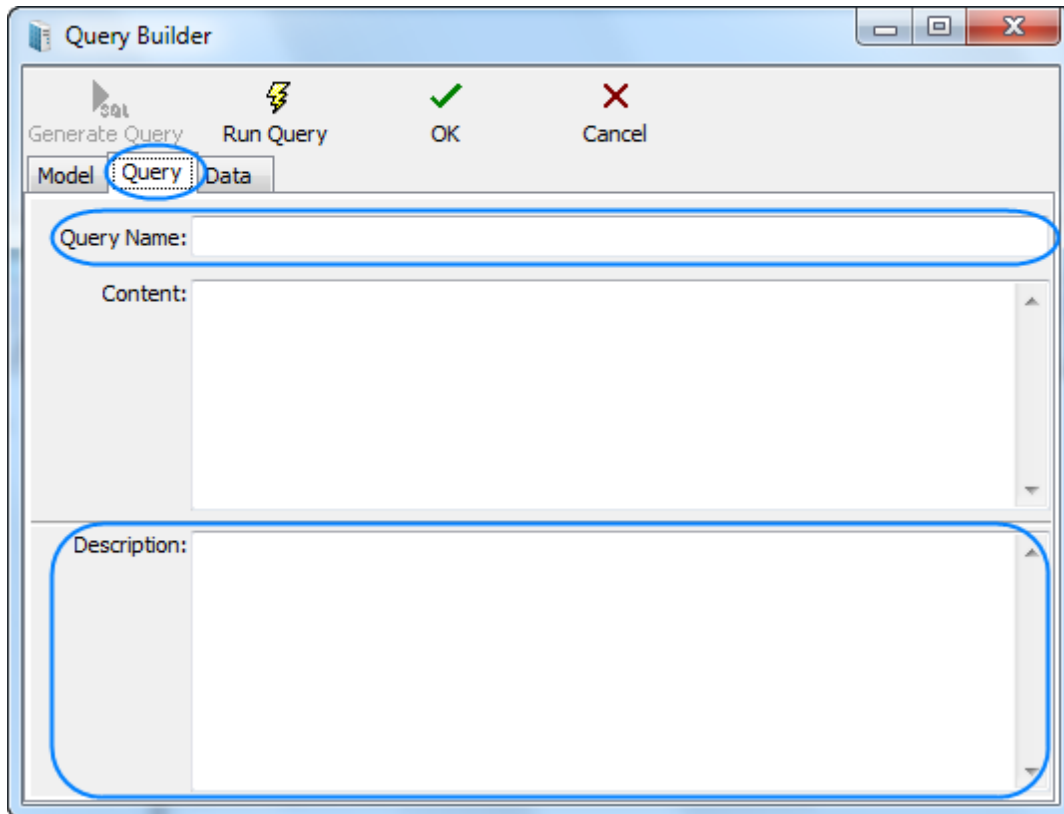
In simple words it will mean the following: To select first ten clients (first 10 client\_id) by counting the sum of invoices and display them in the order of sum reduction (ORDER BY 2 DESC).

Click **Run Query** button once again to see the new result.

**Note:** If you click **Generate SQL** after editing the query manually the query will be rebuilt and the results of your work will be lost.

## 7. Saving newly created query

To save the query model switch to the **Query** tab, specify the **Query Name** and **Description** (optionally) and click **OK** button.

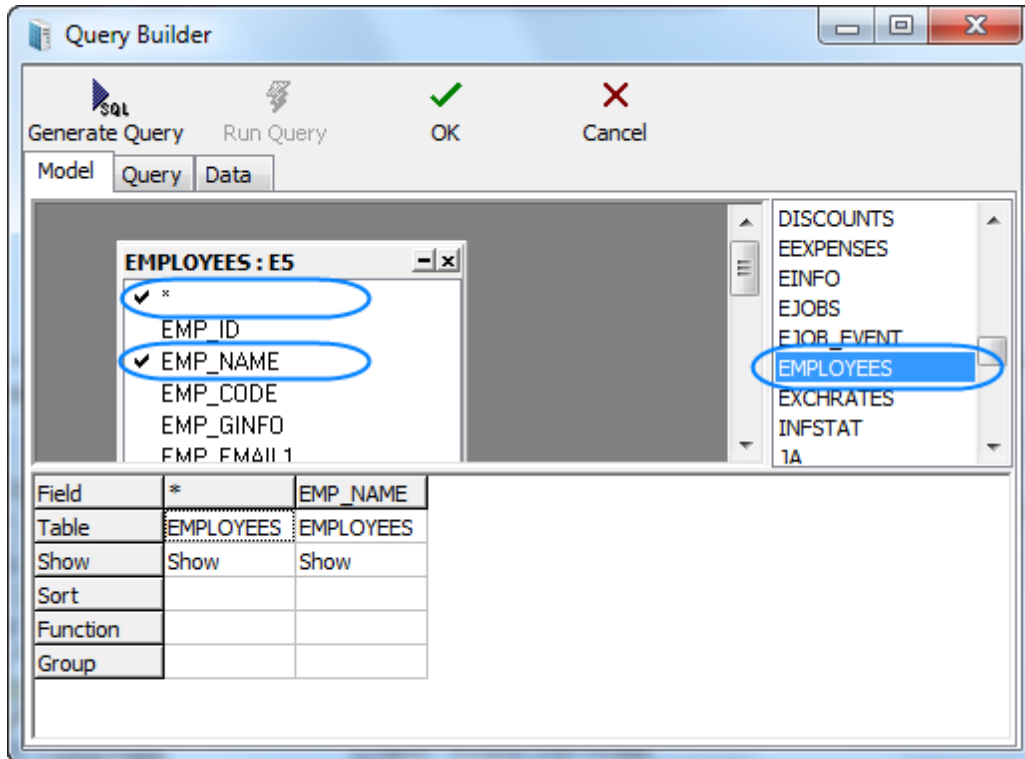


## Example: Single Table Query

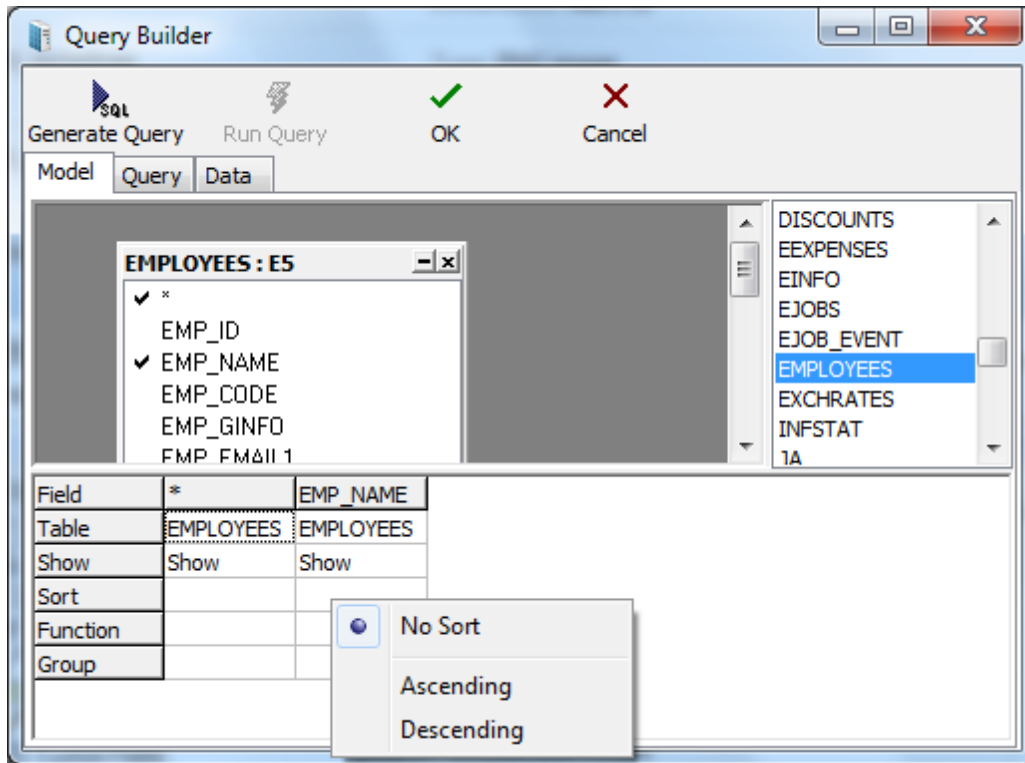
Objective: Get the list of corporate experts with all data sorted by experts' names.

1. Drag&drop EMPLOYEES table at the working area.

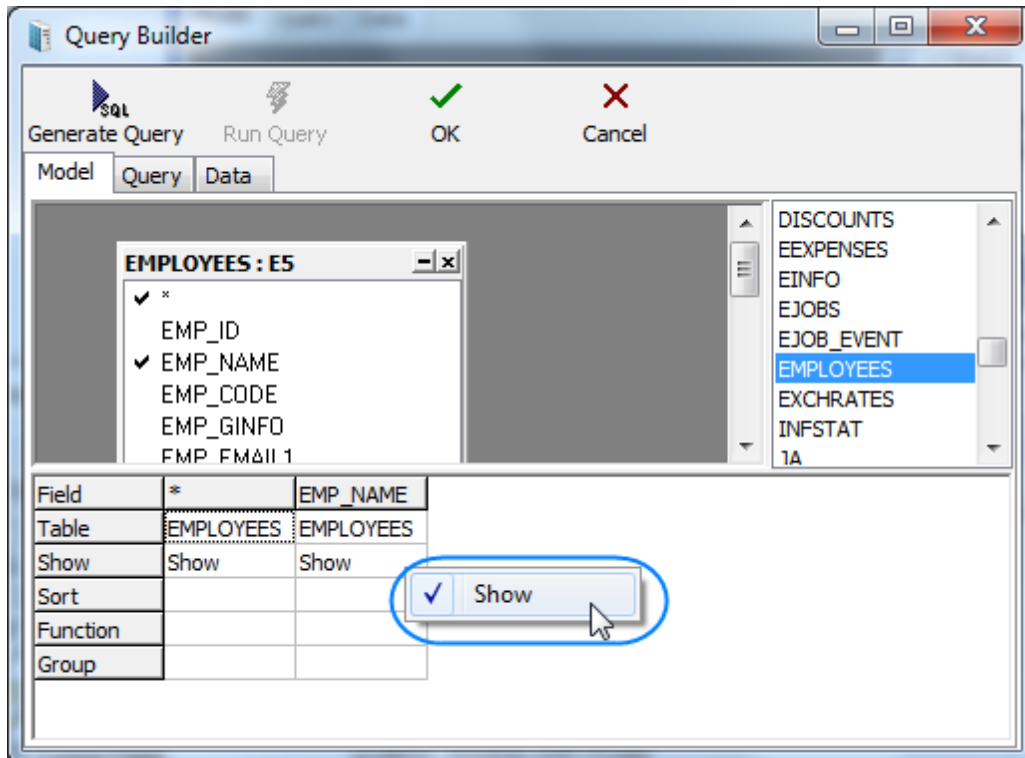
2. Select the asterisk "\*" (to display all table fields) and the field EMP\_NAME (needed for sorting).  
After performing of these actions we can see the following picture under model working area:



3. In order to sort data by the corporate experts names you need to right-click the cell where EMP\_NAME column and the Sort row intersect, and choose the sorting type:

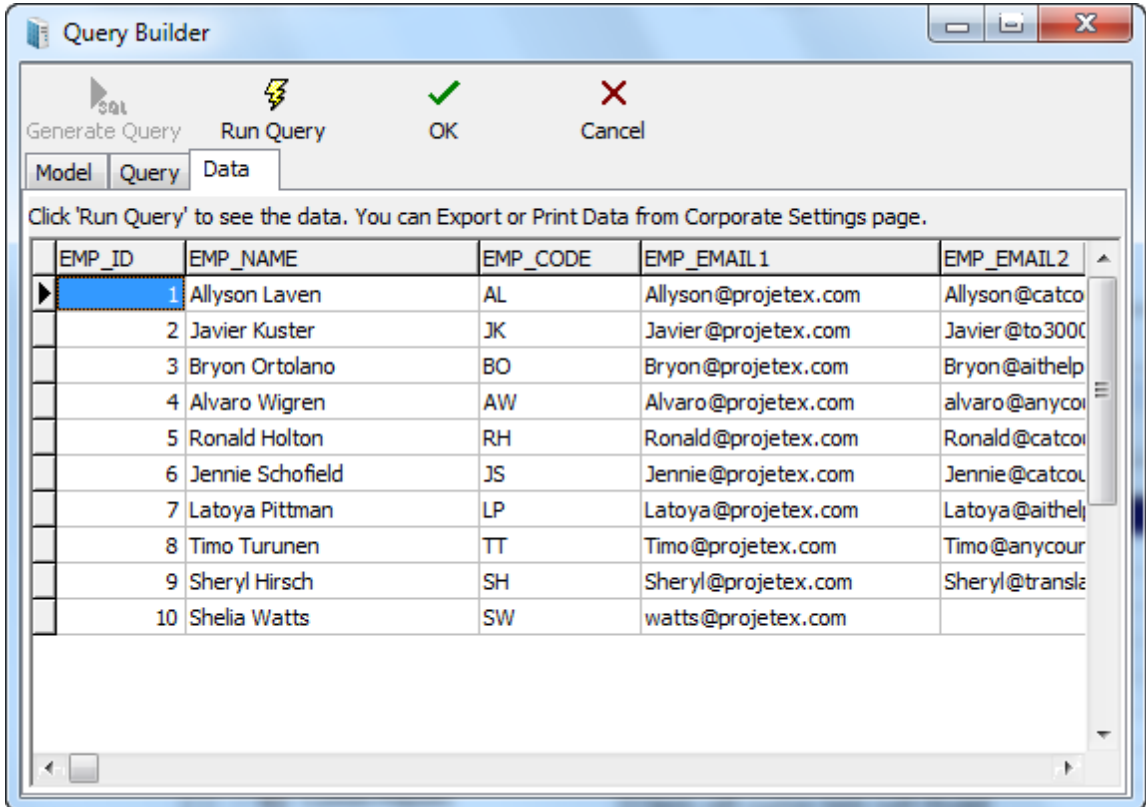


4. The EMP\_NAME field will be displayed twice in the results of this given model. To avoid this problem, right-click the cell where the EMP\_NAME column and Show row intersect and clear the **Show** option.





- Click the **Generate Query** button to generate and see the SQL code. Generated request will be located in **Content** field on the **Query** tab.
- You can view results by clicking the **Run Query** button. You will get a table with a list of all the **Corporate Experts** and their data including service data.



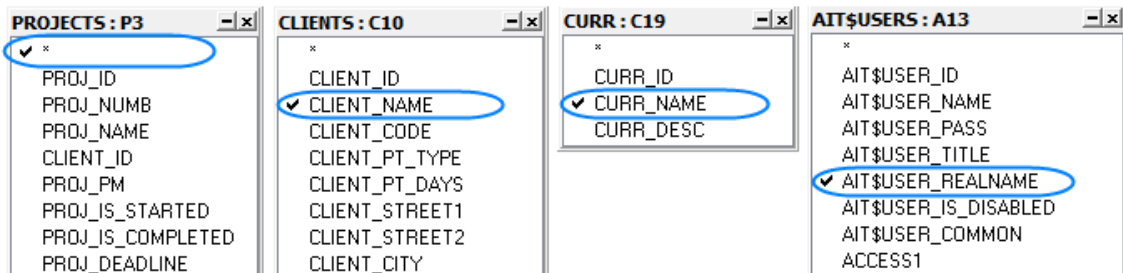
- To save the request model switch to **Query** tab, specify **Query Name** and **Description** (optionally) and click **OK** button.

**Note:** You can export or print these data from the **Custom Queries** tab of the **Server Administrator Corporate Settings** (using **Export Data** and **Print Data** buttons) (the query should be saved as described in the previous paragraph).

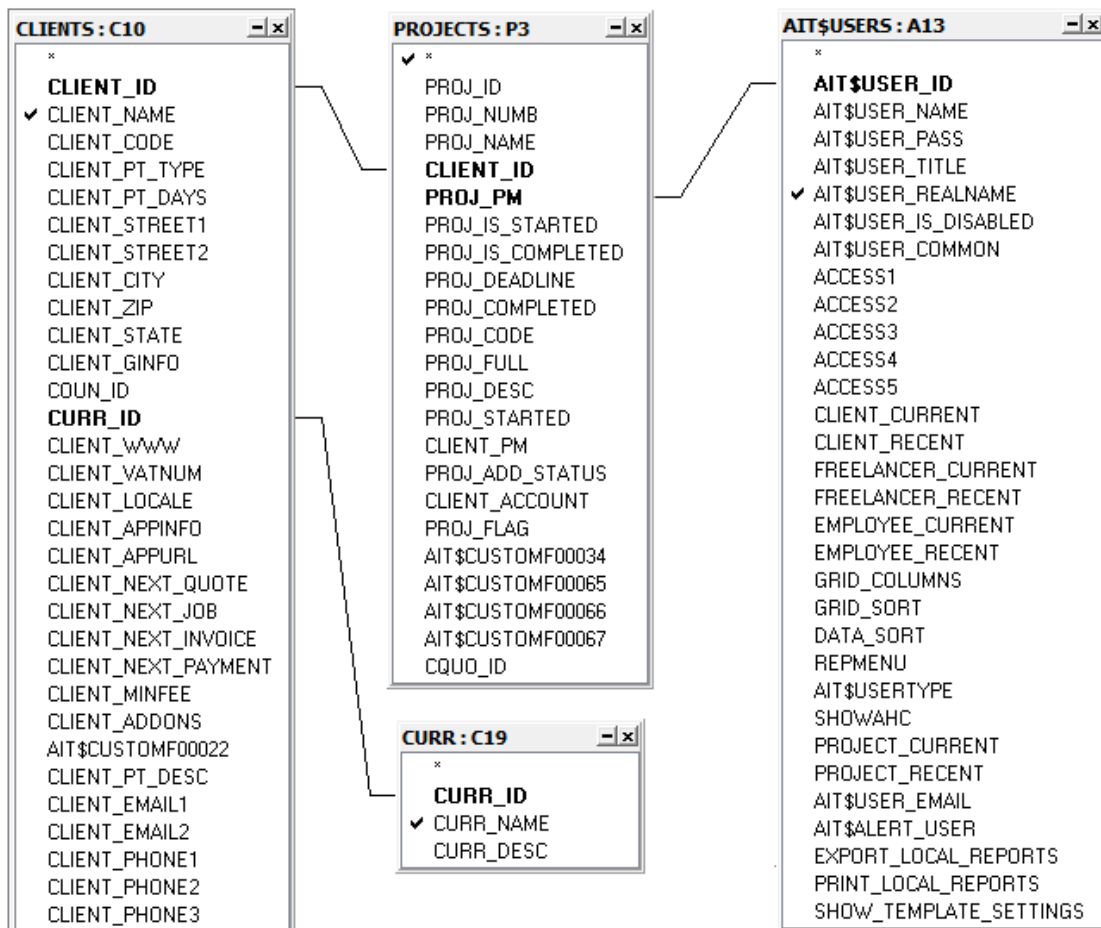
## Example: Linking Tables

Objective: Get a list of all the projects with all their data sorted by experts names, with client, project manager name and currency names.

- Drag&drop PROJECTS, CLIENTS, CURR and AIT\$USERS tables to the working area. In the PROJECTS table select "\*" field (to display all table fields); select also CLIENT\_NAME field in the CLIENTS table, CURR\_NAME field in the CURR table and AIT\$USER\_REALNAME field in the AIT\$USERS table.



2. In order to get the name of the client the project is assigned to, you need to set connection between PROJECTS and CLIENTS tables by unique field CLIENT\_ID: click and hold left mouse button on CLIENT\_ID field in PROJECTS field, drag it to CLIENT\_ID field in CLIENTS table, and release the button. Similarly you need to connect the tables CLIENTS and CURR by unique CURR\_ID field, PROJ\_PM field of the PROJECTS table and AIT\$USER\_ID field of the AIT\$USERS table. As a result you get the following:



3. After the request model has been created, click **Generate Query** button. SQL code of the request will be generated and displayed in the **Content** field on the **Query** tab.


4. You can view the results clicking **Run Query** button: you will get a table with a list of all the

projects and their data including service data.

The screenshot shows a 'Query Builder' window with a table of project data. The table has the following columns: CLIENT\_NAME, AIT\$USER\_REALNAME, CLRR\_NAME, PROJ\_NUMB, PROJ\_CODE, PROJ\_NAME, PROJ\_PM, PROJ\_IS\_STARTED, PROJ\_IS\_COMPLETED, and PROJ\_D. The data is as follows:

CLIENT_NAME	AIT\$USER_REALNAME	CLRR_NAME	PROJ_NUMB	PROJ_CODE	PROJ_NAME	PROJ_PM	PROJ_IS_STARTED	PROJ_IS_COMPLETED	PROJ_D
Internet Security Technologies	William McSun	EUR	35	0035	SSH technology	-1	True	True	07.03.2
Internet Security Technologies	Fernando Lucena	EUR	36	0036	Training Schedule	6	True	True	03.04.2
Unlimited Concepts Unified	William McSun	USD	44	0044	UCU web-site localization	-1	True	False	22.06.2
Unlimited Concepts Unified	William McSun	USD	45	0045	Booklet about Unlimited Concepts Unified	-1	True	False	13.06.2
Translation Designs	William McSun	USD	48	0048	Localization of internal CRM system	-1	True	False	14.08.2
Translation Designs	William McSun	USD	49	0049	CRM system guide	-1	True	False	02.05.2
Enigma Server Technologies, Inc	William McSun	EUR	37	0037	Server-client technology specification	-1	True	True	21.05.2
Enigma Server Technologies, Inc	William McSun	EUR	50	0050	Proofread www.enigaservertech.com	-1	True	False	17.08.2
Reliable Network, Inc	Bartholomeo Rodrigues	EUR	23	0023	VPN connection troubleshooting	8	True	False	16.06.2
Reliable Network, Inc	William McSun	EUR	51	0051	Virtual Private Network Scheme	-1	True	False	11.11.2
Global Interactive Resources	William McSun	EUR	52	0052	GlobalSYS manual (consulting only)	-1	True	False	21.08.2
Global Interactive Resources	William McSun	EUR	53	0053	Web-site content review	-1	True	False	23.06.2
The Lightning Graphics	William McSun	USD	19	0019	Marketing booklet	-1	True	True	18.09.2
The Lightning Graphics	Bartholomeo Rodrigues	USD	32	0032	Thermal Displacement Guide	8	True	False	05.06.2
The Lightning Graphics	Fernando Lucena	USD	34	0034	Norby workshop	6	True	True	16.12.2
Global Concepts Universal	William McSun	JPY	27	0027	Tax policy in EU	-1	True	False	21.06.2
Global Concepts Universal	Fernando Lucena	JPY	31	0031	Virtual Reduction Engine	6	True	False	16.07.2

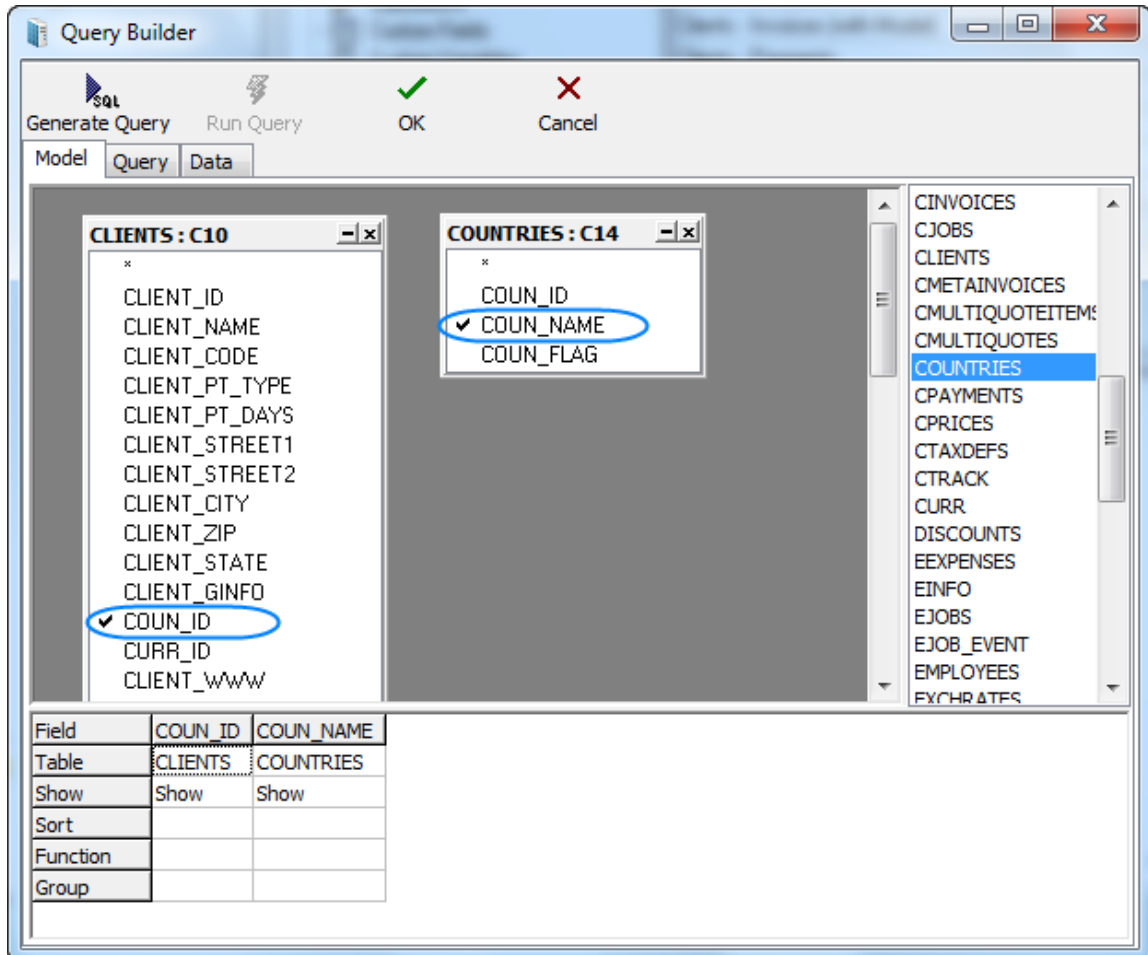
5. To save the request model switch to the **Query** tab, specify the query name and description (optionally) and click **OK** button.

 **Note:** You can export or print these data from the **Custom Queries** tab of the **Server Administrator Corporate Settings** (using **Export Data** and **Print Data** buttons) (the query should be saved as described in the previous paragraph).

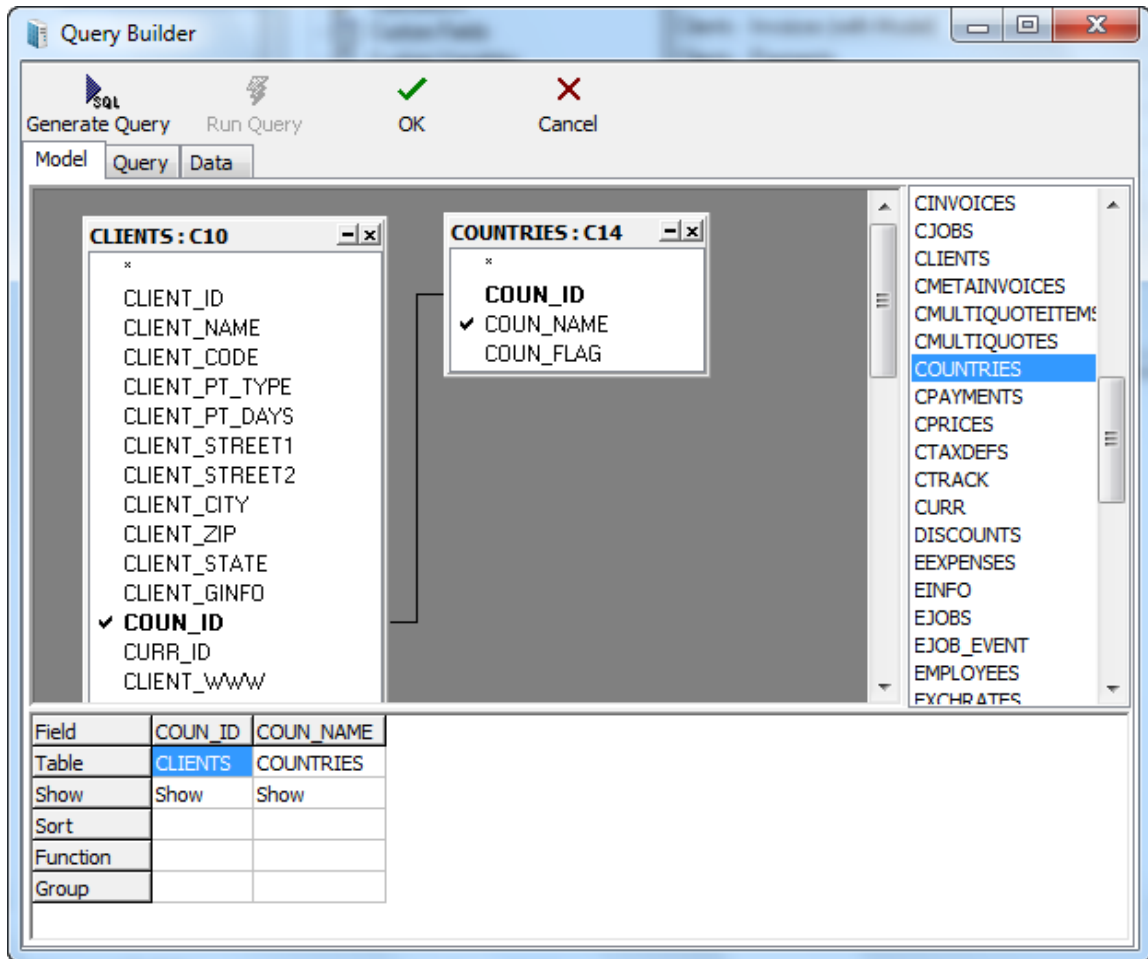
## Example: Using Functions in Queries

Objective: Get statistics on clients by countries (i.e. the number of clients from each country).

1. Drag&drop the tables CLIENTS and COUNTRIES to the working area. In the CLIENTS table check the COUN\_ID field, and also COUN\_NAME field in the COUNTRIES table.



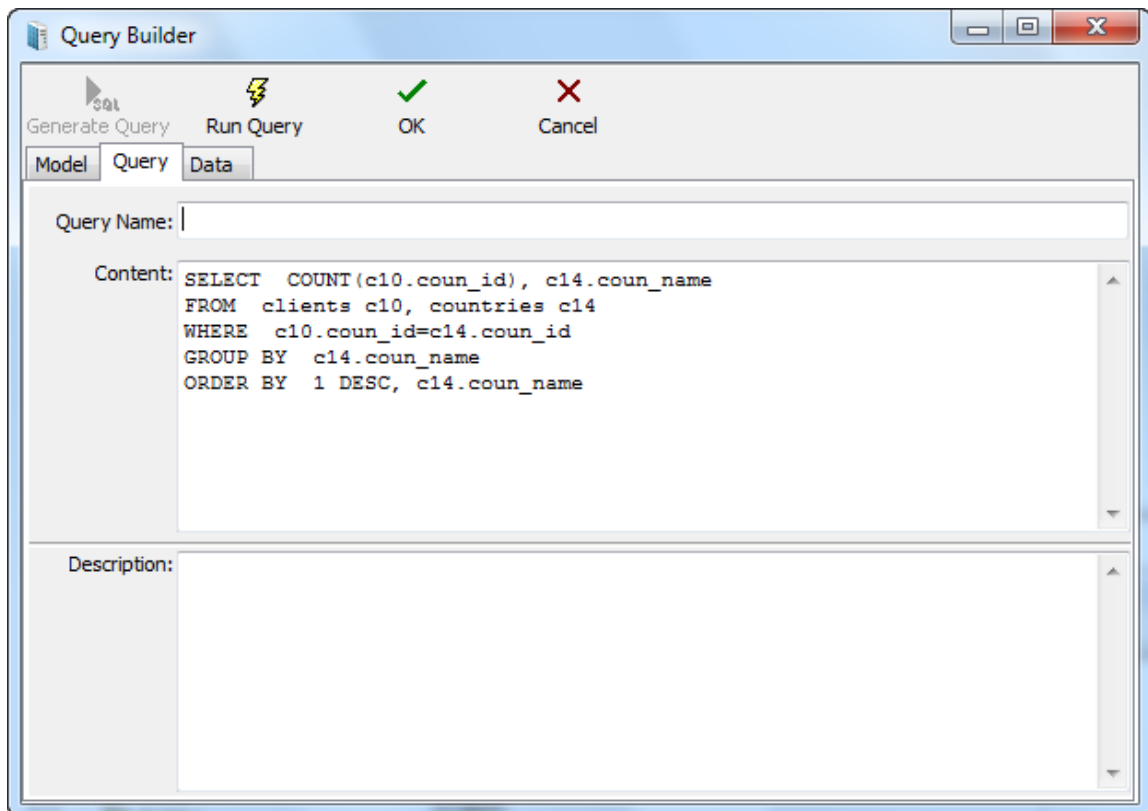
2. Set the connection between the tables CLIENTS and COUNTRIES by unique field COUN\_ID: click and hold left mouse button on the COUN\_ID field in the CLIENTS field, drag it to the COUN\_ID field in the COUNTRIES table, and release the button. As a result you get the following:



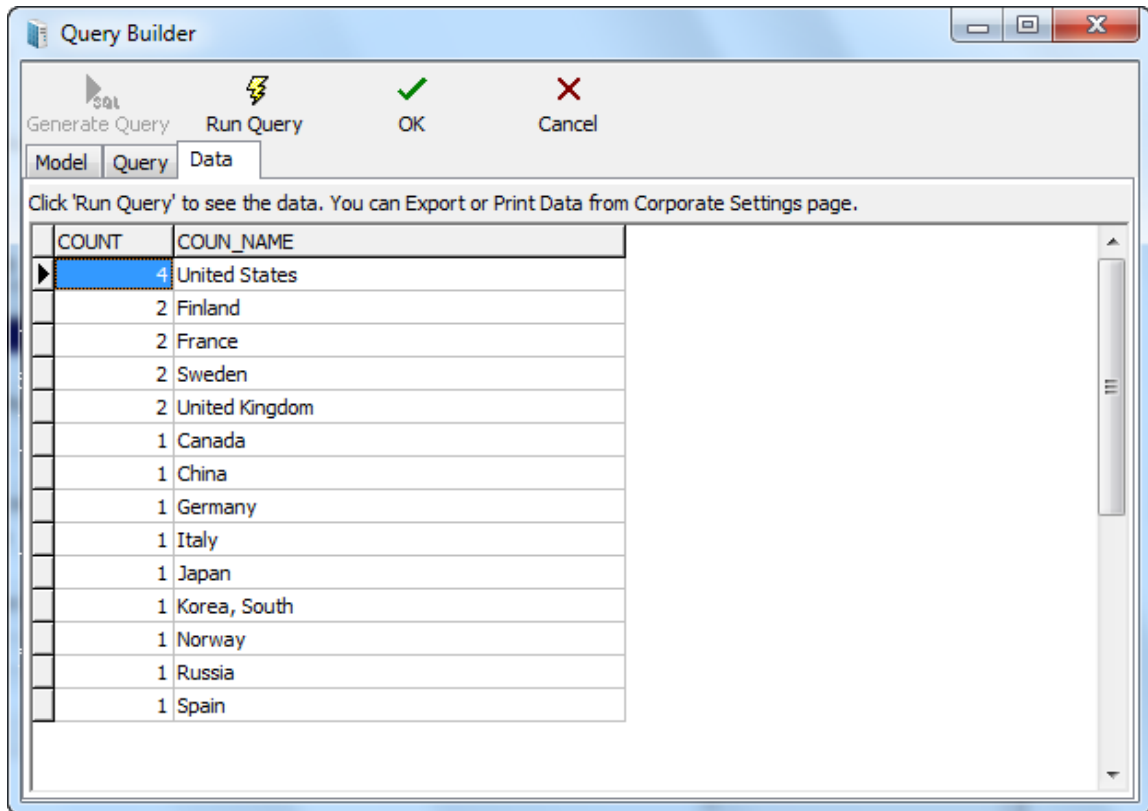
3. Now you need to specify the selection conditions. Set the necessary sorting order: number of countries (in the CLIENTS table) — descending, names of the countries — ascending). For the COUN\_ID field choose the Count function, and also set grouping by country name:

Field	COUN_ID	COUN_NAME
Table	CLIENTS	COUNTRIES
Show	Show	Show
Sort	Desc	Asc
Function	Count	
Group		Group


4. After the request model was created, click **Generate Query** button. SQL code of the request will be generated and displayed in **Content** field of **Query** tab.



5. You can view the results by clicking **Run Query** button. You will get the table with countries rating according to the number of your clients from each country. For example:



6. To save the request model switch to the **Query** tab, specify the **Query Name** and **Description** (optionally) and click **OK** button.

 **Note:** You can export or print these data from the **Custom Queries** tab of the **Server Administrator Corporate Settings** (using **Export Data** and **Print Data** buttons) (the query should be saved as described in the previous paragraph).

## Custom Reports in Projetex

### Using Custom Reports

Custom reports are used to extract and view consolidated and summary printable information from **Projetex** database. Custom reports can be viewed, exported and printed from **Projetex Workstation** window.

To access custom reports, on the **Custom Reports** menu of **Projetex Workstation** click **List**.

### Access to custom reports

Access to custom reports can be granted or denied for any **Projetex** user with the help of **Projetex Server Administrator**.

To edit user access rights to custom reports you will need access to **Projetex Server Administrator**.

1. Run [Projetest Server Administrator](#).
2. Click **Database** tab.
3. Put your database offline by clicking **Go Offline** button.
4. Once database is offline, switch to **Corporate Settings** tab.
5. Click **Users and Access** section, select required user in the list and click **Edit** button.
6. In **Edit User** window select or clear **Custom Reports View** option.

## Managing custom reports

### Custom Reports settings in Projetest Server Administrator

Custom reports can be created edited and deleted with the help of [Projetest Server Administrator](#).

To create, edit or delete custom reports open **Custom Reports** section of [Projetest Server Administrator Corporate Settings](#) tab.

1. Run [Projetest Server Administrator](#).
2. Click **Database** tab.
3. Put your database offline by clicking **Go offline** button.
4. Once database is offline, switch to **Corporate Settings** tab.
5. Click **Custom Reports** section to open custom report management options.


### Exporting a custom report

To export a custom report, save required report in .PXR2 file. This file can later be imported into another [Projetest](#) database.

1. Select the required custom report in the list.
2. Click **Save** button.
3. Specify name and location for **PXR2** file being saved.

### Importing a custom report

You can import a custom report to your database from a **PXR2** file.

 **Note:** Custom reports which are displayed in **Custom Reports** section of [Projetest Server Administrator](#) are the ones currently integrated into [Projetest](#) database. **PXR2** files are used solely for export-import purposes, simply copying new **PXR2** file to `\\AIT\Projetest 8\Projetest Server\Reports\` will not import the new report into database.

To import a custom report, use **PXR2** file to load required report.



1. Save *PXR2* file being imported to `\\AI\Projetex 8\Projetex Server\Reports\` folder.
2. Click **Load** button.
3. Locate *PXR2* file being imported, select it and click **Open** button.


## Editing a custom report

To make changes to a custom report, select this report in the list and click **Edit** button. This button opens **FastReport** window (report designer interface). **FastReport designer** is a complex tool intended for IT specialists. It requires some basic *SQL* knowledge. Step-by-step creation of simpler reports is described in *Example: creating a report* topic. Also you can download FastReport manual from our website using the following link: [http://version7.projetex.com/images/stories/files/documents\\_pdf/CustomReports\\_ReportEngine\\_Guide.pdf](http://version7.projetex.com/images/stories/files/documents_pdf/CustomReports_ReportEngine_Guide.pdf)

For detailed information visit the **Fast Report Inc.** Internet site: <http://www.fast-report.com>

## Creating Custom Report

This topic will cover the process of creating a simple custom report.


 **Note:** This is a sample of **FastReport** engine functionality intended for users generally unfamiliar with *SQL*. For *SQL*-versed users it is recommended to refer to FastReport manual available for download on <http://www.projetex.com/documentation>

## Creating A Custom Report

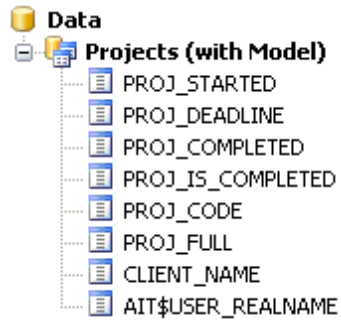
1. Run **Projetex Server Administrator**, turn the database offline by clicking **Go Offline** button and switch to **Corporate Settings** tab.
2. Click **Custom Reports** on **Corporate Settings** tab of **Projetex Server Administrator**.
3. Click **New** button; enter report name and description in **New Custom Report** window and click **OK**.
4. Add data which should be used in the report. To do so, on **Report** menu click **Data** in **FastReport Designer** window (it will open automatically, once you click **OK** button).

This will open **Select Project Datasets** dialog window, in which all your custom queries are displayed. Select the required queries by selecting check boxes in front of their names. For this example we selected **Projects (with Model)** query, since we are composing a "Projects report".

Click **OK** button to confirm selection.

 **Note:** You can create your own custom queries with the help of built-in query builder. Any custom queries created this way will appear in this dialog window.

5. Now, contents of the selected query are displayed in the **Data** field to the right:

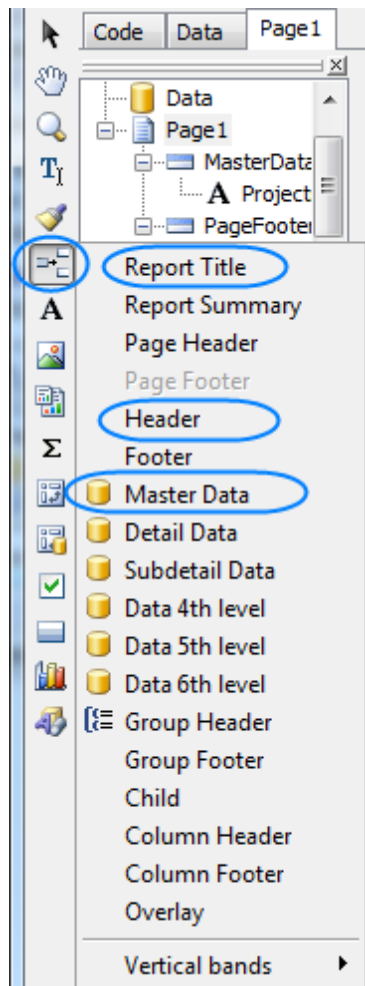


These are the fields from [Projetex](#) database, which have been added to the query you selected. In this particular case, the fields are those, containing project names (*PROJ\_FULL*) and codes (*PROJ\_CODE*), dates of project timeline (*PROJ\_STARTED*, *PROJ\_DEADLINE* and *PROJ\_COMPLETED*), information as to whether project has been completed or not (*PROJ\_IS\_COMPLETED*) and corresponding client names (*CLIENT\_NAME*).

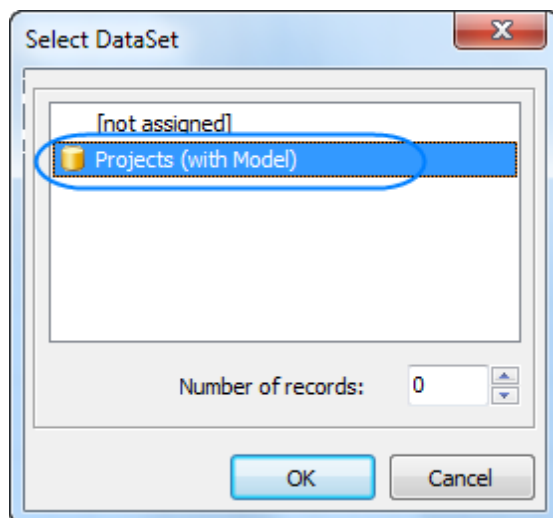
6. Begin designing your report by placing **Data Bands**.

These “bands” bind report elements together, specifying their location on the page relatively to page itself and to the other bands. More detailed description of the bands can be found in [FastReport User Manual](#). For this particular report you will need to use only few of the bands available.

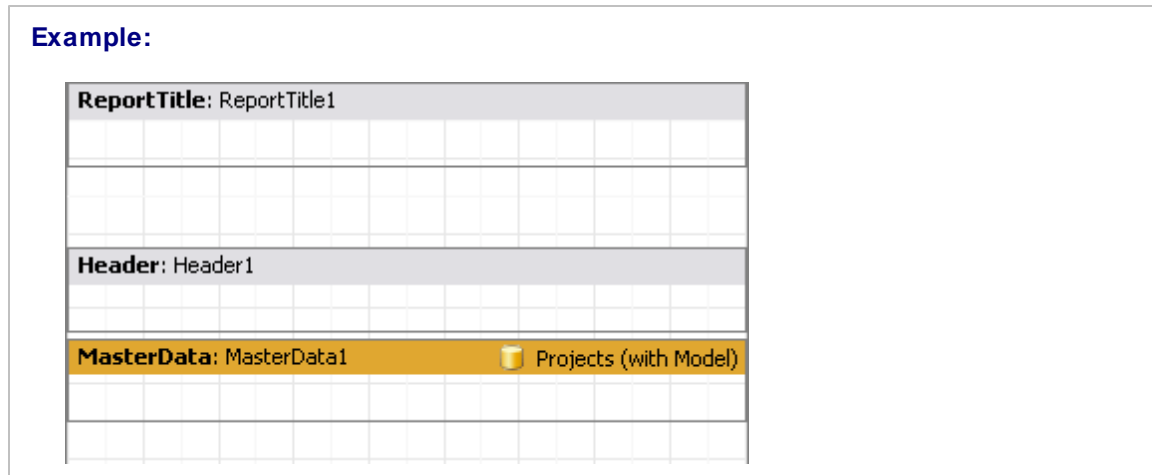
6.1. Click **Insert Band** button and select **Report Title** band. This will place mentioned band to your report page. Click **Insert Band** button again and select **Header band** to place it.



6.2. Click **Insert Band** button one more time and select **Master Data** band to place it in your report. When placing **Master Data** band select your **Projects (with Model)** query when prompted to do so:

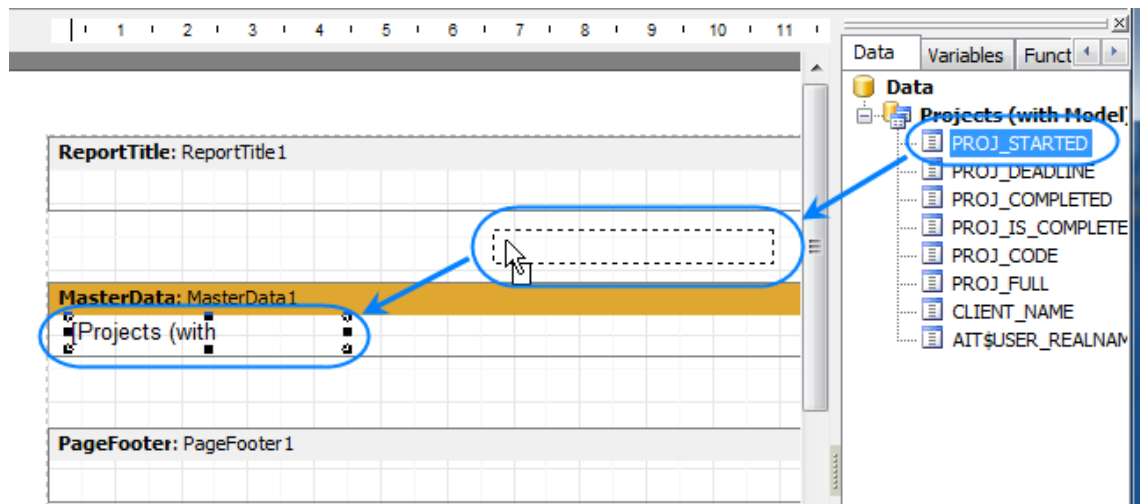


Your report page should look approximately like this:



#### 7. Adding data to **Master Data** band.

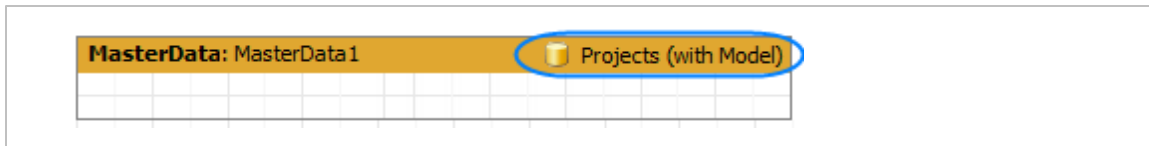
To add a variable data to your report, you will need to drag-and-drop the required fields from your query to **Master Data** band.



Any **Master Data** band can be linked to certain dataset (or query in this case) only, so in case you have more than one query, be sure to drag and drop fields only to that **Master Data** band, which has been linked to this query.

#### **Example:**

For example, the **Master Data** band below can contain fields from *Projects (with Model)* query.



Drag sequentially the following fields from the **Data** area and place them inside **Master Data** band in a row:

**Example:**


PROJ\_FULL, CLIENT\_NAME, PROJ\_DEADLINE

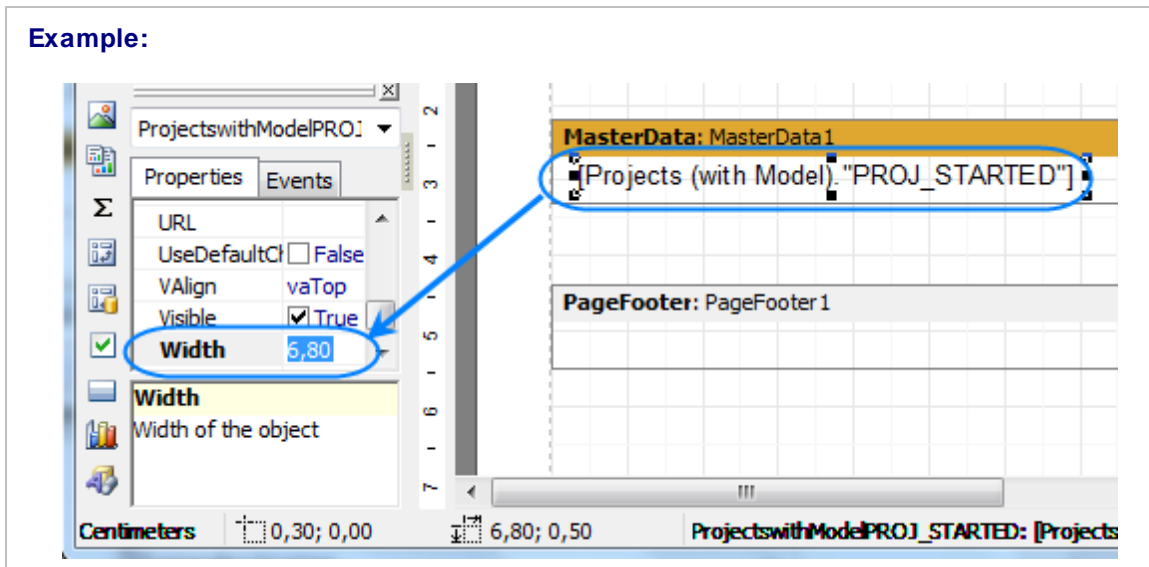
When placed into your report, the fields take form of text objects, like the example below:

**Example:**

[Projects (with Model)."PROJ\_FULL"]

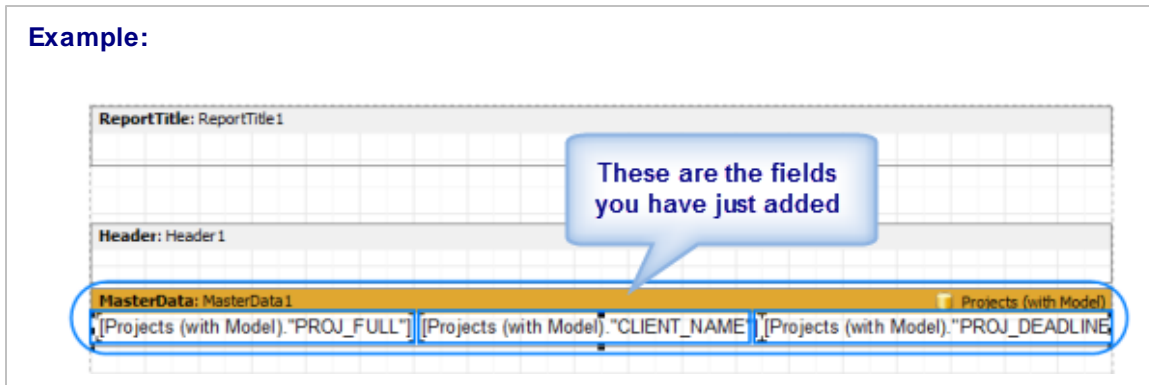
These text objects act very much like text variables in Projetex RTF templates.

 **Note:** Some of these objects may be very wide. You can adjust their width by dragging the borders of these objects. Alternatively, you can enter exact object length by selecting it and typing their width in **Properties** area:



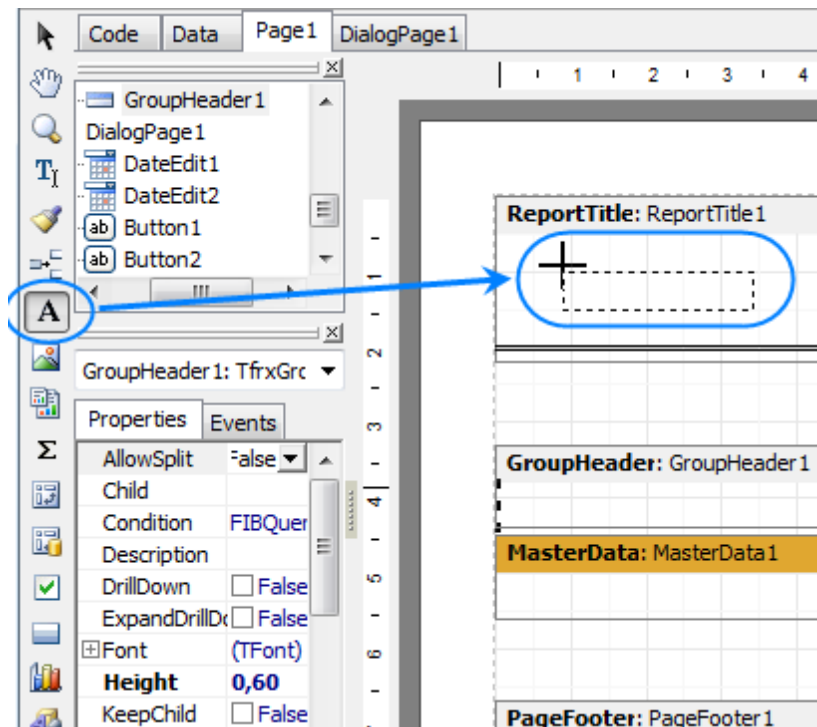
Once all the data has been added, your report should look like this:

## Example:

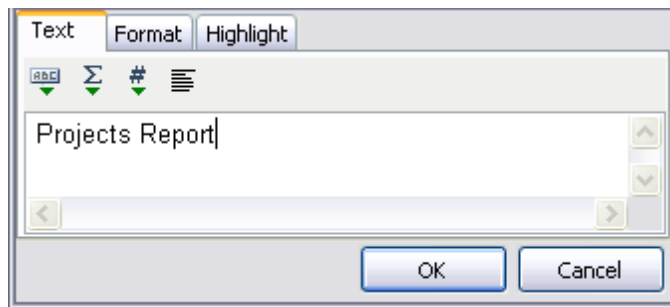


## 8. Adding stationary data to other bands.

8.1. Add a header for your report by clicking **Text object** button and placing the object on your report, within the **Report Title** band.



8.2. Type the header for your report in the memo window which appears.




8.3. Data will be displayed in your **Master Data** band in columns (each indicated by a field from the query). Add the names of these columns right above the query field objects in your **Header** band: Project name, Client, and Deadline the same way you added the header text object.

After this your report should look as follows:

**Example:**

ReportTitle: ReportTitle1		
Projects Report		
Header: Header1		
Project Name	Client	Deadline
MasterData: MasterData1		
[Projects (with	[Projects (with Model). "CLIENT_NAME"]	[Projects (with Model). "PROJ_DEADLINE"]

9. Preview your report by clicking **Preview** button. Your report preview will be displayed in the **Preview** window.

 **Note:** You can further configure style of your report by configuring the style of text objects. Select required text object and adjust its format in the **Properties** area to the left.

10. Save your newly created report by clicking **Save** button and close report designer.

New report is now ready to be used.

If you want to save this report in a separate file in the **Reports** folder of **Projetex** (so that you can send it to other **Projetex** users), select the report in the list and click **Save** button.

## Creating a Master-Detail Report

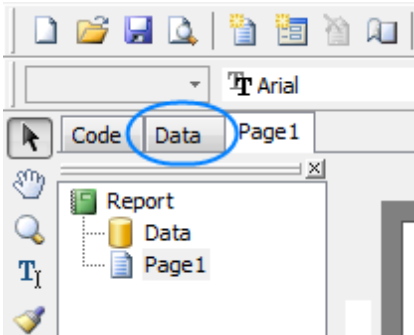
It is often needed to gather information from different database tables. For example, to obtain list of quotes and list of marketing records for each of clients. In this case, list of clients represents "master" data, and lists of quotes and events are called "detail" data (they show details on each of the client).

Objective: Create a report showing lists of quotes and marketing events per each of clients.

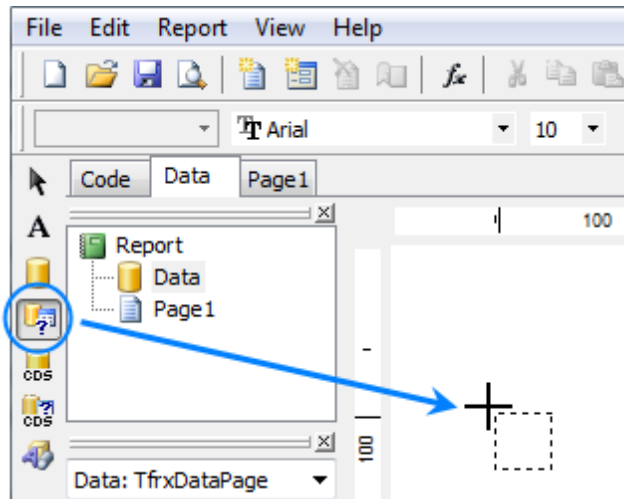
1. Run **Projetest Server Administrator**, turn the database offline by clicking **Go Offline** button and switch to **Corporate Settings** tab.
2. Switch to **Custom Reports** section on **Corporate Settings** tab of **Projetest Server Administrator**.
3. Click **New** button; enter report name and description in **New Custom Report** window and click **OK**.

In this case none of the pre-designed queries suits this report, thus new queries must be created.

4. Click **Data** tab to begin adding data to your query,



5. Click **FIB Query** button and place an **FIB Query** object anywhere on the white field.



6. Double-click the new object, and enter the code text of the first query:

**Example:**

```
SELECT
CQUO_NAME ,
CQUO_SENT ,
CQUO_TOTAL_B
FROM CMULTIQUOTES
```



```
WHERE CLIENT_ID = ?MAS_CLIENT_ID
```

This query will extract quote names (CQUO\_NAME), dates (CQUO\_SENT), and quote totals in base currency (CQUO\_TOTAL\_B). Line WHERE CLIENT\_ID = ?MAS\_CLIENT\_ID arranges the data by master client reference.

7. Repeat step 5 (click **FIB Query** button and place an **FIB Query** object anywhere on the white field) and add the following code to second query:

**Example:**

```
SELECT  
  
CTRACK_DATE ,  
  
CTRACK_INFO  
  
FROM CTRACK  
  
WHERE CLIENT_ID = ?MAS_CLIENT_ID
```

This query will extract dates (CTRACK\_DATE) and notes (CTRACK\_INFO) of marketing events (shown on the **Marketing** tab of **Client** window), and will also organize the data by master client reference field.

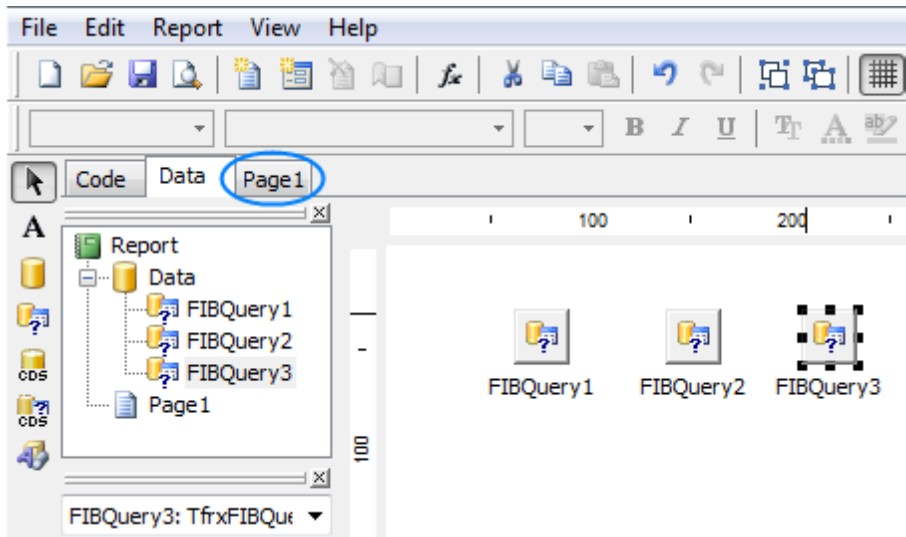
8. Repeat step 5 (click **FIB Query** button and place a **FIB Query** object anywhere on the white field) and add the following code to third query:

**Example:**

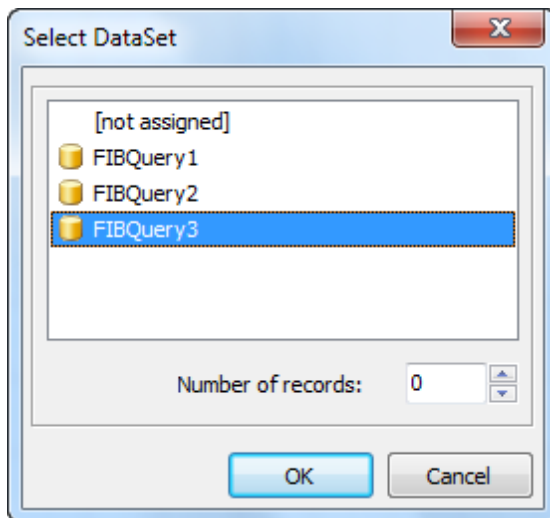
```
SELECT  
  
CLIENT_NAME  
  
FROM CLIENTS
```

This query will extract client names, which are also needed to build this report.

9. Click **Page 1** tab to begin designing the report page.



10. Click **Insert Band** button and add a **Master Data** band. Select **FIBQuery3** as dataset for this band.



11. Click **Insert Band** button and add a **Detail Data** band. Select **FIBQuery2** as dataset for this band.

12. Click **Insert Band** button and add a **Detail Data** band. Select **FIBQuery1** as dataset for this band.

13. Drag necessary fields to the appropriate data bands.

**Example:**

Dragged the following fields: **CLIENT\_NAME** - to the **MasterData1** band, **CTRACK\_DATE**, **CTRACK\_INFO** - to the **DetailData1**, **CQUO\_SENT**, **CQUO\_NAME** - to the **DetailData2**.

<b>MasterData:</b> MasterData1	FIBQuery3
[FIBQuery3."CLIENT_NAME"]	
<b>DetailData:</b> DetailData1	FIBQuery2
[FIBQuery2."CTRACK_INFO"]	
<b>DetailData:</b> DetailData2	FIBQuery1
[FIBQuery1."CQUO_NAME"]	

14. Add **Header** and **Footer** bands to separate various fields visually.

**Example:**

The following bands were placed in this example: **ReportTitle**, 2 **Header**-type bands ( **Header1** and **Header2**), **Footer** band and **PageFooter** band. Also labels for header bands have been added.

<b>ReportTitle:</b> ReportTitle1	
<b>MasterData:</b> MasterData1	FIBQuery3
[FIBQuery3."CLIENT_NAME"]	
<b>Header:</b> Header1	
Marketing History	
<b>DetailData:</b> DetailData1	FIBQuery2
[FIBQuery2."CTRACK_INFO"]	
<b>Header:</b> Header2	
Quotes	
<b>DetailData:</b> DetailData2	FIBQuery1
[FIBQuery1."CQUO_NAME"]	
<b>Footer:</b> Footer1	
<b>PageFooter:</b> PageFooter1	
Report collected: [Date] [Time]	Page [Page#] of [TotalPages#]

15. Now the report can be obtained:

**Example:**

Fragment of resulting report, showing clients (master data), lists of quotes and marketing records per each of them (detail data).

<b>Alter Ego Solutions</b>	
Quotes	
20.01.2008	Nulla quam.
<b>Electric Dream Design</b>	
Marketing History	
25.05.2009	56n57n
25.05.2009	56n6n56n
Quotes	
21.01.2008	Field mis-match (Description)
16.03.2008	AcroLexic Dictionary
<b>Mythology Development Company</b>	
Marketing History	
25.05.2009	56n65n
05.05.2009	56n56n
26.04.2009	56n56n56n
Quotes	
10.04.2008	Economic History Manual
Report collected: 6/10/2009 10:26:13 AM	Page 1 of 3

## Other Products by AIT

### AcroLexic

#### Dictionary of Acronyms and Abbreviations

AcroLexic 2.0 is a capacious dictionary of acronyms and abbreviations. With AcroLexic you can forget about tedious searching through countless pages of dictionaries each time you come across an unknown abbreviation. Currently it contains more than 70,000 terms with more than 150,000 definitions! The dictionary enables quick look ups of acronym definitions from different areas of knowledge and provides results in a convenient format. AcroLexic will be a valuable addition to your electronic bookshelf.

Web-site:

<http://www.acrolexic.com>

Download free trial:

<http://download.acrolexic.com/AcroLexic2Setup.exe>

## AnyCount

### Word Count, Character Count, and Line Count Software

AnyCount is an essential timesaving product for any translation business. It produces quick and exact automatic counts both in words and in other volume units (characters with spaces, characters without spaces, lines, pages, custom units) for all common file formats. AnyCount counts words — you count money!

Web-site:

<http://www.anycount.com>

Download free trial:

<http://download.anycount.com/AnyCount7Setup.exe>

## AnyLexic

### Terminology Management Software

AnyLexic — Terminology Management Software. It's a long-awaited software which could take any glossary and make it easy-to-use. With the terminology stored in one database terminology management becomes simple: you can easily create, edit and exchange terminological dictionaries in a reliable and convenient way. The software is not tied to any particular terminology. AnyLexic will help you to gain high quality and consistency in translation.

Web-site:

<http://www.anylexic.com>

Download free trial:

<http://download.anylexic.com/AnyLexic2Setup.exe>

## AnyLexic Server

### Server for Terminology Management Software

AnyLexic Server is a server software that enables a harmonious teamwork with terminology among AnyLexic users. You needn't ping-pong dictionaries anymore. Different users with granted rights may have access to a common term database either via local area network or via Internet. With data back-up security, integrity check and repair AnyLexic Server helps to gain ultimate terminology among translators working under one project.

Web-site:

<http://www.anylexic.com>

Download free trial:

<http://download.anylexic.com/AnyLexic2ServerSetup.exe>

## AnyMem

### User-Friendly Translation Memory Software

AnyMem is a user-friendly translation memory software. AnyMem is compact, stable, easy to learn and to use. AnyMem CAT engine fully supports Unicode and can work with any language pair without the need of external components, like .NET Framework or Java Virtual Machine, commonly required by other translation memory software.

Web-site:

<http://www.anymem.com>

Download free trial:

<http://download.anymem.com/AnyMem2Setup.exe>

## CATCount

### Computer Assisted Translation Tool for Easy Word Count

CATCount is useful software tool for translation industry professionals. It greatly eases task of accounting of Computer Assisted Translation jobs. CATCount does this by translating complex CAT Scheme into one easy number, i.e. CATCount. Additionally, it provides great features for printing and export of used CAT Scheme together with original word counts, and resulting CATCount. Word count analysis logs of Trados Translator's Workbench are processed automatically.

Web-site:

<http://www.catcount.com>

Download:

<http://download.catcount.com/CATCountSetup.exe>

## ClipCount

### Clipboard Wordcount Software

ClipCount is ideal for fast text count in any file or program. Just select text you want to count and press CTRL+C keys (or any other combination you select) and window with count results appears in the bottom right corner of the screen. ClipCount can count word, characters with spaces, characters without spaces and custom count units.

Web-site:

<http://www.clipcount.com>

Download free trial:

<http://download.clipcount.com/ClipCount2Setup.exe>

## ExactSpent

### Easy and Exact Time Tracking Software

ExactSpent is an efficient time management software that enables you to calculate exact time you spent on particular job. You can track multiple jobs for multiple clients in a single place. The software will help you get organized, increase your productivity, and make better use of your time. ExactSpent allows you to see clear picture of all your tasks and time expenses. Let you rule time, not time rules you.

Web-site:

<http://www.exactspent.com>

Download free trial:

<http://download.exactspent.com/ExactSpent2006Setup.exe>

## Projetex

### Project Management Software for Translation Agencies

Projetex is a Project Management software for translation agencies. It is a flagship product by AIT being used by 200+ translation agencies around the world. Our customers have already appreciated how Projetex simplifies task of corporate and freelance workflow management, data and files sharing within a translation agency.

Web-site:

<http://www.projetex.com>

Download free trial:

<http://download.projetex.com/Projetex7Setup.exe>

## Translation Office 3000

### Portable Headquarters of the Freelance Translator

Translation Office 3000 transforms the complex and diverse world of your translation business into an easily-manageable one. It is widely used by small translation agencies. It is a unique



---

combination of many benefits for your translation business in a single software package. With Translation Office 3000 you can communicate more consistently keeping track of all the important things, which happen in your freelance translation business. This software will be your personal accountant, adviser, assistant, and project manager. Simplify your task of administration workflow with Translation Office 3000!

Web-site:

<http://www.to3000.com>

Download free trial:

<http://download.to3000.com/SetupTO3000V9.exe>

## WinLexic

### **GUI to Microsoft® Glossaries for Technical Translators and Technical Translation Agencies**

WinLexic — GUI to Microsoft Glossaries for Technical Translators and Technical Translation Agencies. Displays glossaries in a nice and convenient dictionary form. Allows fast search for glossary terms. It simplifies the work with multilingual terminology used in Microsoft software products.

Web-site:

<http://www.winlexic.com>

Download free trial:

<http://download.winlexic.com/WinLexic2005Setup.exe>

# Index

## - A -

access role 153, 154  
 account  
   create 27  
 accountant 17  
 accounts 26  
   assigning and removing account managers 27  
   default 28  
   managers 27  
 AcroLexic 235  
 add 65  
 address 48, 58  
 AnyCount 31, 236  
 AnyLexic 236  
 AnyLexic Server 237  
 AnyMem 237  
 assign account managers 64  
 autobackup 136

## - B -

backup 136

## - C -

CAT  
   count 32  
   scheme 32  
 CATCount 238  
 change 88  
 Clear Locks 170  
 client 52  
   profile 46  
 client contacts  
   create 62  
   edit 62  
 client job 74  
   new 74  
 client profile  
   create 61  
   edit 61  
 clients

  window 45  
 ClipCount 238  
 clone client 62  
 code 49  
 columns 23  
 commands  
   functions 178  
 connection 51, 55  
 contact 59, 63  
 contact email 55  
 contacts 49  
 contextual menu  
   break locks 164  
   download 164  
   download versions 164  
   lock 164  
   system menu 164  
   unlock 164  
   upload 164  
   upload and unlock 164  
 corporate 20, 21, 60, 65, 76  
 corporate expert 19  
   profile 53  
 corporate job  
   new 76  
 corporate settings  
   base currency 127  
   business folder 129  
   CATcount 133  
   codes 129  
   custom fields 131  
   custom queries 133  
   custom reports 133  
   custom variables 132  
   database access 129  
   folders 129  
   freelancer terms 127  
   general 127  
   invoice codes 129  
   ODBC 129  
   PO codes 129  
   postal address format 127  
   salutations 131  
   sound alerts 134  
   user access rights 128  
   user access roles 129  
   user accounts 128  
   users and access 128

corporate team  
  expert 53  
create 63, 69, 71, 74, 76, 78, 149, 150  
  JA 95  
  job assignment 95  
  PO 88  
  purchase order 88  
create client accounts 63  
create draft job 70  
create invoice 82  
create quote 69  
currency 29  
  add 30  
  base 29  
  client 30  
  exchange rate 30  
  freelancer 30  
  prices 31  
custom fields 140, 141, 143  
custom queries 205  
  example 214, 216, 219  
  tutorial 206  
custom query  
  SQL 114  
custom report  
  creating 224, 230  
  master-detail 230  
  SQL 115  
custom reports  
  administration 223  
  obtaining 222  
  user access 222  
customization 141  
customize 23

## - D -

data filter  
  search 39  
  timeframe 39  
database  
  backup 135  
  check 138  
  compress 136  
  connected users 139  
  offline 135  
  optimize 136  
  repair 139

  restore from backup 137  
  start 134  
  stop 134  
  switch 135  
  unlock 138  
  update 137  
database management 156  
document 49  
download 8  
draft 71

## - E -

edit 63, 65, 71, 74, 76, 78, 149, 150, 154  
  JA 96  
  job assignment 96  
  PO 90  
  purchase order 90  
edit invoice 83  
edit payment 98  
ExactSpent 238  
expert 55, 65  
export 43, 115, 117  
  excel 43  
  html 43  
  pdf 45  
  rtf 44  
  word 44  
  xls 43

## - F -

file 163  
files 22, 167  
files and folders  
  operation 164  
  structure 159  
folder 163, 167  
folders  
  ftp 169  
format 49, 59  
freelance job 78  
  new 78  
freelancer 58, 59, 60, 65  
  profile 57  
freelancers  
  window 56

FTP 51, 55

## - G -

general prices 67  
global code 88  
group 140

## - I -

import  
clients 106  
comma-separated 112  
csv 112  
database 105  
dbase 110  
dbf 110  
excel 109  
freelancers 106  
plain text 111  
scenario 114  
text 111  
txt 111  
xls 109  
xml 113  
interface  
buttons 33  
menu 38  
moving columns 24  
navigation 35  
sorting records 23  
invoice 50, 98, 172

## - J -

JA 22  
job 71, 76  
job assignment 22  
jobs 20, 21, 52

## - L -

link 98  
local report  
export data 39  
locale 59  
locking files 163

login 13

## - M -

mass  
PO 92  
purchase orders 92  
mass client payments 99  
mass freelancer payments 101  
mass invoice 86  
menu  
custom report 42  
help 42  
navigation 41  
new object 41  
settings 42  
team 42  
workstation 40

## - N -

new 154  
JA 96  
job assignment 96  
PO 90  
purchase order 90  
new invoice 83  
new payment 98  
next 49  
next code 55, 60

## - O -

odbc 156  
open 143

## - P -

page 25  
page mode 25  
payment 49, 98  
payment terms 59  
person 63  
persons 49  
PM 15  
PO 98  
policy 50

postal 48, 58  
 price copy from general 68  
 prices of  
   clients 67  
   freelancers 67  
 print 172  
   JA 97  
   job assignment 97  
   PO 80, 94  
   purchase order 80, 94  
 print invoice 84  
 print payment 104  
 print quote 71  
 procedures 15, 17, 19  
 project  
   new 72  
 project manager 15  
 Projetex 239  
 Projetex 7.0 12

## - Q -

quote 69, 172

## - R -

Registration 10  
 related folders 167  
 requirments 8

## - S -

save 172  
 save invoice 84  
 save payment 104  
 search freelancer 65  
 services 68  
 set default account 64  
 settings 60  
   categories 121  
   countries 121  
   currencies 119  
   currency exchange rates 120  
   custom fields 126  
   discounts 120  
   fonts 126  
   general colors 124

groups of services 118  
 info 121  
 markups 120  
 notes 121  
 payment methods 121  
 schedules 127  
 services 119  
 status colors 125  
 taxes 120  
 templates 121  
 volume units 119  
 wordcount 122  
 setup 8  
   Internet 15  
   LAN 14  
 share 163  
 shortcut 167  
 status 163  
 system 8

## - T -

table 25  
 templates  
   date format 183  
   locale 183  
 template variables  
   client 185  
   client job 190  
   common 184  
   contact 188  
   corporate job 191  
   freelance job 193  
   invoice 195  
   payment 199  
   PO 200  
   project 187  
   purchase order 200  
   quote 188  
 templates 171  
   editing 174  
   manage 183  
   store 183  
   synchronization 183  
   syntax 175  
 terms 49  
 Translation Office 3000 239

**- U -**

Upgrade 10, 12  
Upload Changes 170  
user 149, 150, 153

**- V -**

version  
    revision 170  
volume usints 68

**- W -**

WinLexic 240  
wordcount 31