



System Administrator — Reference Guide

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1 Database Platform

Firebird Database Server

Projetex 9 uses [Firebird SQL Relational Database Server](#) as its 'heart', which powers [Projetex 9](#) database.

[Firebird](#) is a multi-platform open source database server based on the source code of [Interbase](#), released under the General Public License by Borland Software Corp.. Current version 2.5 of [Firebird Database Server](#) contains numerous enhancements compared to original release.

What does it mean for you?

[Zero additional cost now.](#)

Firebird Database Server does not require additional licensing (even for commercial use), and as a result, we did not have to add database license mark up to final price of [Projetex](#).

[Zero additional cost in the future.](#)

Firebird Database Server is free of any license fees even for commercial use. Therefore, when you team grows, you will need to upgrade only your [Projetex](#) software. There would be no need to purchase additional license for upgrade of the database server.

[Continuous further development.](#)

As [Firebird Database Server](#) does not belong to any commercial corporation, there is no risk of it becoming obsolete because of some corporate decision to stop further upgrades. It is being continuously enhanced and developed by open-source community of software developers.

Using [Projetex 9](#) does not require any knowledge of inside workings of [Firebird Database Server](#). All database set up and maintenance tasks can be easily performed using [Projetex 9 Server Administrator](#).

However, if you would like to gain deeper understanding of capabilities of [Firebird Database Server](#) you can read more about [Firebird](#) on the following websites:

<http://www.firebirdsql.org>

<http://www.ibphoenix.com>

2 System Requirements

Server Requirements

Tests show that [Projetex 9 Server](#) can be successfully installed in the following environments:

Hardware and Software	Requirements/Supported
Operating System	Windows 98 Windows ME Windows 2000 Windows XP Windows Server 2003 Windows Vista Windows 7
CPU	300Mhz or higher
Memory	256MB or more
Hard Disk Space for Setup	100MB
Hard Disk Space for Operation	400MB
Other	LAN, VPN, or Internet connection to connect to your Projetex Server 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.

Workstation Requirements

[Projetex 9 Workstation](#) can be successfully installed in the following environments:

Hardware and Software	Requirements/Supported
Operating System	Windows 98 Windows ME Windows 2000 Windows XP Windows Server 2003 Windows Vista

	Windows 7
CPU	300Mhz or higher
Memory	128MB or more
Hard Disk Space for Setup	80MB
Hard Disk Space for Operation	400MB
Other	LAN, VPN, or Internet connection to connect to your Projetex Server remotely

3 Server and Database Operations

3.1 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\Projetex 9\Projetex 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 *Projetex 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 *Projetex* Support. We will thoroughly test all future versions of *Firebird*, their proper functioning with *Projetex Server* and *Workstation* software, and will consider all pros and cons before recommending upgrade. Voluntary upgrades may cause unstable operation of *Projetex*.

3.2 Switching database offline or online

To change status of the database click **Go Online** or **Go Offline** button (depending on current database status) on **Database** tab of **Projex Server Administrator**.

The following options are available when switching database offline:

Normal (recommended) — **Projex** will wait for the specified time until all workstations have disconnected before turning database offline. **Projex 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 **Projex Server** is waiting for **Workstations** to close. **Projex Server** will not proceed with shutdown if at least one **Projex Workstation** remains connected.

Forced — forcefully disconnect all **Projex Workstations** from database. Using this option is inadvisable, since such operation may cause the loss of data being entered into **Projex** at the time of shutdown.

3.3 Backup

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

To perform a backup operation:

1. Click **Backup** button on the **Database** tab of **Projetex Server Administrator**.
2. Specify the location of backup file by clicking **Select** button.
3. Enter backup file name in the **Backup File** field.
4. Click **OK** button to begin backup operation.

3.4 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:

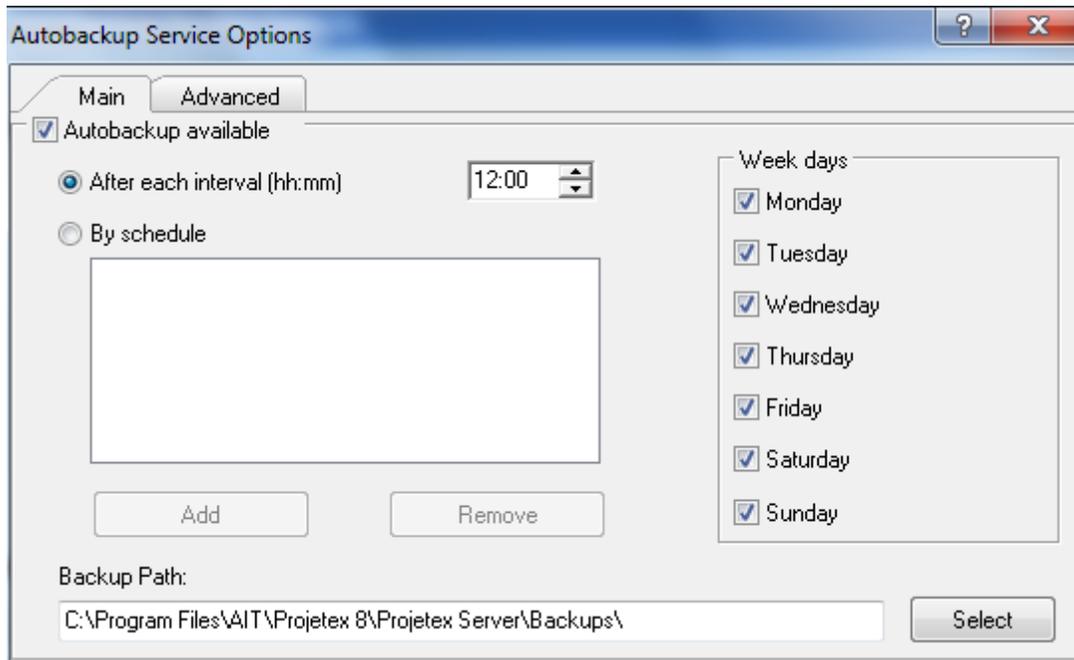
1. Click **Quick Optimization** button on the **Database** tab of [Projetex Server Administrator](#).
2. Click **Yes** button in the confirmation dialog and wait for the quick optimization process to complete.

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**.

3.5 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 log records.

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

3.6 Restore

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

To restore your database from a backup file:

1. Turn your database offline by clicking **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**.

3.7 Run Update Script

In some cases, when you update your [Projex Server Administrator](#) or [Projex Workstation](#), database needs be updated as well. Usually database version is automatically updated during [Projex 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 [Projex Server Administrator](#) and can be found in *C:\Program Files\AIT\Projex 9\Projex 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 [Projex 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 [Projex 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:** [Projex 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.

3.8 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.

3.9 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.

3.10 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\projetex.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 *Projetex.fdb* file and run Restore operation. After the process has been completed, move the restored *Projetex.fdb* file to *C:\Program Files\AIT\Projetex 9\Projetex Server\Repair* folder, return your current *Projetex.fdb* to *C:\Program Files\AIT\Projetex 9\Projetex 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.

3.11 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.

4 Server Administrator Corporate Settings Tab

4.1 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.

4.2 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.

4.3 ODBC Access Section of Corporate Settings Tab

ODBC Access area of **Corporate Settings** tab can be used to enable access to **Projex** 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 Projex section.

4.4 Access Roles Section of Corporate Settings Tab

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

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

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

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

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

4.5 Codes Section of Corporate Settings Tab

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

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

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

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

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

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

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.

4.6 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 *Projetex Server Administrator*.

To open Folders tab, click **Folders** in the left part of the **Corporate Settings** window.

Business folder location

General tab of the Folders section can be used to change location of the *Business* folder. Client, project and expert folders are located inside the *Business* folder.

To change the default location, click **Change** button and select new location on a local PC or in a network.

Folder settings

Other tabs of the **Folders** section represent different types of folders inside *Business* folder.

Use **Add Folder** or **Add Subfolder** buttons to add folders which will be automatically created inside of each new client, project, expert, JA and PO folder.

Project folder tab also can be used to configure the names of project folders.

Automatic folder creation

With the help of automatic folder creation feature for any folder in *Projetex* you can define a number of subfolders to be automatically created upon creation of their parent folder . To enable this feature for certain folder type, select **Automatic Folder Creation** checkbox on the tab of required folder in *Projetex Server Administrator*, in **Folders** section of **Corporate settings** tab.

Every time **Client**, **Project** or **Expert** folder is created by *Projetex Workstation*, any folders or subfolders added to respective tab of **Folders** settings will be created in that folder automatically

To disable creation of customized folders clear **Automatic Folder Creation** on the corresponding tab.

All changes with these custom folders will not be implemented for client and expert with existing **Client** or **Expert** folder.

Project folder name

The way **Project folders** are named can also be customized to some extent. Name of each **Project folder** can consist of the following components:

Project code (obligatory)

Project manager name

Project name

Composition of **Project folder** names can be modified on the **Project Folder** tab of the **Folders** tab of **Projetex Server Administrator Corporate Settings**.

Click **Update Folders** button to apply changes to the names of all Project folders, created before. This feature is available only for name of projects' folders and does not have effect on other folder names.

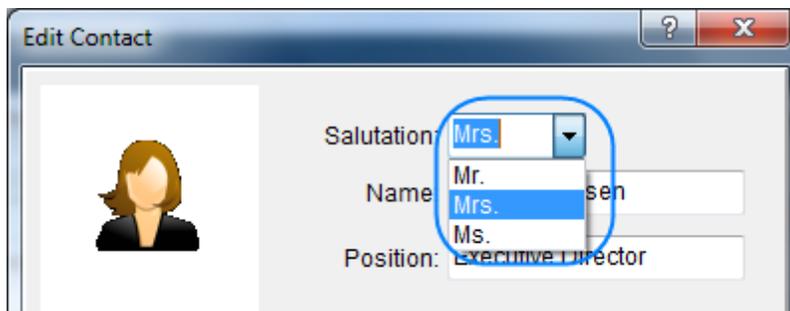
4.7 Salutations Section of Corporate Settings Tab

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.



4.8 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 *Projetex 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 *Projetex Workstation*.

The screenshot shows the 'Corporate Settings' window with the 'Custom Fields' section active. The interface includes several tabs at the top: 'Clients', 'Projects', 'Corporate Team', and 'Freelancers'. Below these are sub-tabs: 'Main', 'Quotes', 'Jobs', and 'Invoice'. A row of buttons allows for group management: 'New Group', 'Edit Group', 'Delete Group', 'Move Up Group', and 'Move Down Group'. A second row of buttons manages individual fields: 'New Field', 'Edit Field', 'Delete Field', 'Move Up Field', and 'Move Down Field'. At the bottom are 'Confirm Changes', 'Cancel', 'Fix Sorting', and 'Change Group' buttons. A table lists the current fields for the 'Common' group.

These tabs represent Projetex windows in which custom fields can be created

These buttons control groups of custom fields

These buttons control custom fields of currently selected group

Field Name	Field type
First contact:	Date
Active Client	Checkbox
Specialization	Text Line
Referral	Text Line
Special terms	Text Line

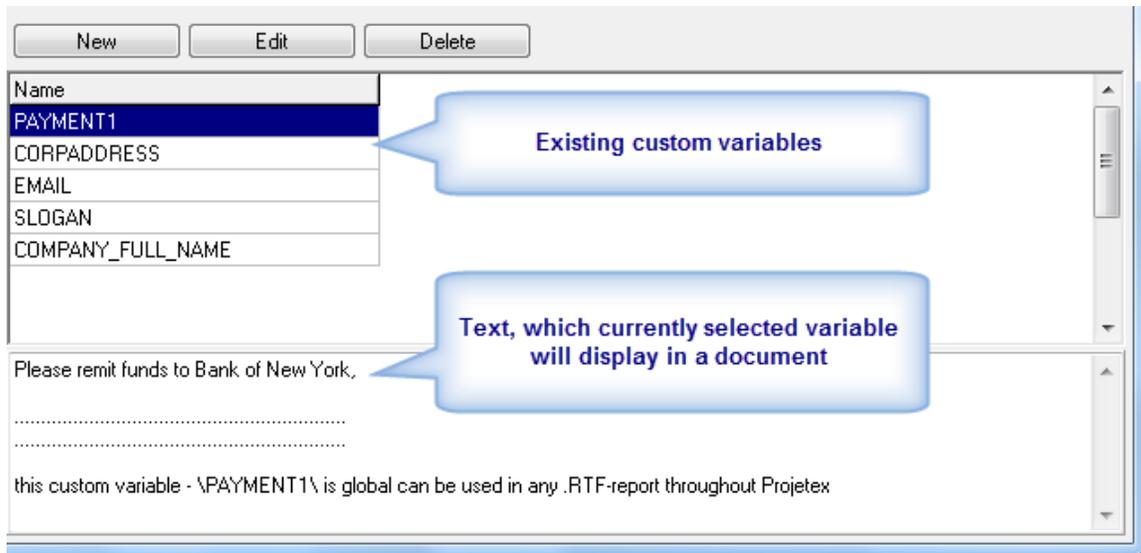
Detail information regarding Custom Field processing can be looked into Database Customization section.

4.9 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 as a content, you will be able to use *\EMAIL* variable inside all your .rtf templates.

If later e-mail of your company changes to info@venusforever.com you will not have to change it in all templates but will be able to do this only once in **Administrator: global custom variables**.

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

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.

4.10 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.

4.11 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.

4.12 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**.

4.13 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.

