

Projetex Freelancers Lookup Tool User Guide

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For version 1.3

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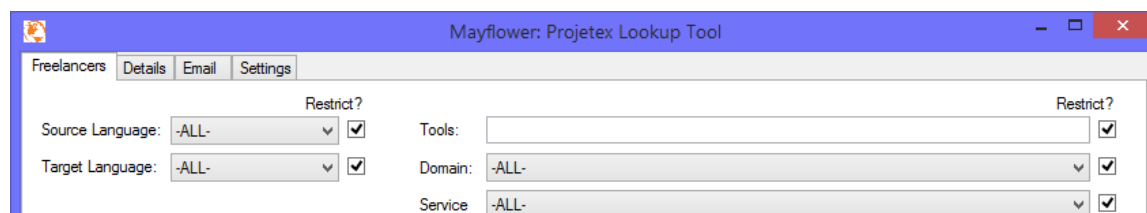
1 Introduction

1.1 Scope and Purpose

The purpose of this tool is to access and display information about freelancers in a way that is hard to do in Projetest.

This guide covers the functionality of the tool and explains how to set it up.

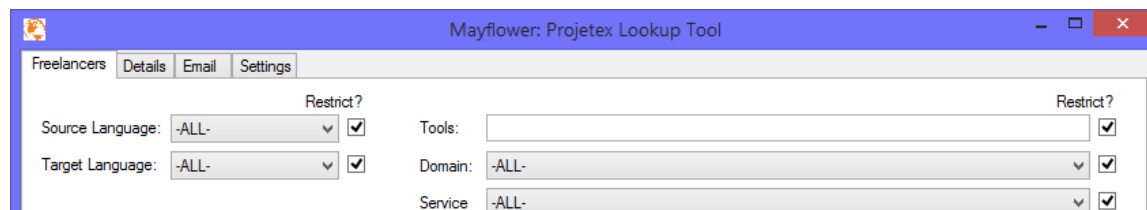
The tool comprises 4 tabs:



- The **Freelancers** tab shows a list of all the freelancers in the Projetest database and some basic information. This list can be filtered using the controls on the top.
- The **Details** tab shows more details about a single freelancer selected from the main list
- The **Email** tab is used to enter a standard email to be sent to a freelancer directly from this tool
- The **Settings** tab is for setting the email server details and the database connection.

1.2 Process Overview

The tool contains four tabs:



- The Freelancers tab shows a list of all the freelancers in the Projetest database and some basic information. This list can be filtered using the controls on the top.
- The Details tab shows more details about a single freelancer selected from the main list
- The Email tab is used to set up a standard email to be sent (for instance including a signature or some standard text). This can be customised every time an email is sent.
- The Settings tab contains details about your name/email address and the parameters to connect to the Projetest database.

The normal sequence for using the tool is:

1. Select the filters required to display the relevant freelancers
2. Double click on one of the freelancers shown in the list
3. Check if the freelancer is free/engaged in another job in the Details tab
4. Send an email (which can be customised either beforehand in the Email tab, or directly when sending an email)
5. Go back to the Freelancers tab and repeat.

1.3 Overview of each tab

Please see later on how to use them.

1.3.1 The Freelancers tab

ID	Name	Source Lang	TargetLang 1	TargetLang 2	Rate	Currency	Country	Role	Service
358	Jorge Merino	English	Spanish (Mexican)	Spanish(LA)	0.04	US Dollars	Paraguay	Freelancer	Transl
394	Ahmed Mohamed Abdelhamid	English(UK)	Arabic	Arabic	0.04	US Dollars	Egypt	Freelancer	Transl
396	Jane Kong	English(UK)	Chinese (Simplified)	Chinese (Traditional)	0.04	US Dollars	China	Agency	Transl
410	Gabriel Catalan Aladren	English(UK)	Spanish		0.05	US Dollars	Spain	Freelancer	Transl
411	Natalia Aleynikova	English	Russian		0.05	US Dollars	Russia	Freelancer	Transl
412	Uhlík Dalibor	English(UK)	Czech		0.06	Euro	Czech Republic	Freelancer	Transl
413	Orawan Preechalertsilp	English(UK)	Thai		0.05	US Dollars	Thailand	Freelancer	Transl

Here it is possible to search for freelances by several available filters.

1.3.2 The Details tab

Date	LastJob	Service	Client	
20/12/2013 11:08	Labdata_Mission_EN_ES(Mex)	English => Spanish (Mexico)	Knowledge Adventure IPL	A
18/12/2013 09:00	IDM_SAP_INTL_F&Q_Userguide_En_ES(LA)	English => Spanish (LA)	Cognizant	F
18/12/2013 09:00	IDM_SAP_INTL_F&Q_Userguide_En_ES(LA)	English => Spanish (LA)	Cognizant	F
06/12/2013 09:00	IDM_SAP_INTL_F&Q_Userguide_En_ES(LA)	English => Spanish (LA)	Cognizant	F

This tab shows extra details about a freelancer. It is accessible by double-clicking on a freelancer in the main table.

1.3.3 The Email tab

Mayflower: Projetest Lookup Tool

Freelancers Details **Email** Settings

Subject: Write the subject of the email here.

Body: Test

Thanks & Regards,
Mohamed Kunhi M A
System Administrator
Mayflower Language Services (P) Ltd.
An ISO 9001:2008 & 27001:2005 Certified Organization
Landline : 91-80-22101888
Mohamed@mayflowerlanguages.com www.mayflowerlanguages.com

LOCALIZATION | TRANSLATION | TESTING | VOICEOVER | MEDIA MONITORING

Celebrating 10 Years of Excellence in Translation & Localization !!!

In this tab it is possible to draft an email, to make it quicker to send emails later. Remember that when sending an email to a freelancer, it can always be changed just before sending it, so it should be very general in this tab.

1.3.4 The Settings tab

Mayflower: Projetest Lookup Tool

Freelancers Details Email **Settings**

Email Settings

Your Name: Michael Scalet

Your Email: michael@mayflowerlanguages.com

Email Server: mail.mayflowerlanguages.com

Email Password:

Port: 587

☒ Test Mode: Don't send to real people

Test Email

Database - HIC SUNT LEONES!

Server Address: 192.168.0.56

Server Port: 3050

Database: E:\Program Files (x86)\AIT\Projetest 9\Projetest Server\Database

Password: ☐ Show

Status:

Test Apply

character set=UTF8;data source=192.168.56.101;initial catalog="C:\Projetest9\Projetest Server\Database\Projetest.fdb";user id=ODBC;password=pwww;role=PROJETEX_ODBC

Various settings related to the tools' functionality. It is essential to fill in the "Email Settings" box to be able to send emails directly from this tool.

Please be careful about changing values in the Database box: a wrong setting will prevent the tool from functioning – it is best left alone.

2 Working with freelancers' info

Once started, the tool will open in the Freelancers' tab (unless there is a missing configuration, in which case it will go to the Setup tab; see 3-Changing settings).


It is possible to filter the list of freelancers based on several fields, as details in the next section.

2.1 Restricting freelancers' list

The list can be restricted by Source language, target language, tools used, domain and service type.

2.1.1 Restricting by Source language

To restrict the list by Source language, click on the "Source Language" dropdown and select the desired source language. Upon clicking, the list will immediately update showing only the freelancers that operate from the source language selected.

Source Language:  The keyword "-ALL-" turns off filtering, showing all freelancers irrespective of their source language.



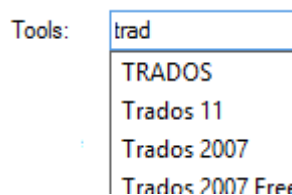
The Restrict flag instructs the program to restrict the list based on the criterion on its left. For instance, if the Source language selected is "French" and the "Restrict" checkbox is ON, then only freelancers whose source language is "French" will be shown. When the "Restrict" box is OFF, then no filter will be applied, regardless of what Source Language is selected (i.e. all freelancers will be shown).

2.1.2 Restricting by Target language, domain and Service

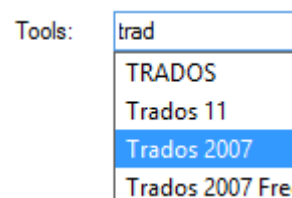
See the above paragraph, as the same mechanism applies to every other listbox/checkbox on this page.

2.1.3 Restricting the list by tools used

If you want to restrict the list of freelancers by which tool/software they use, click on the Tools field and start typing:



As soon as you start typing, a list will come up with all the tools listed in the database containing the characters you are typing. In the example on the left, typing "trad" brings up a list of tools containing "trad".



At this point, 2 choices are available:

- Press Enter: the Freelancers list will update and be filtered by any tool that contains the word typed (in the example, if typing "trad", all the following will be included: Trados, Trados 2007, Trados Studio, etc.
- Select an entry from the list with mouse (or with the arrow keys+Enter): in this case the freelancers list will be updated with the tool selected and all tools containing that name. For instance, selecting "Trados 2007" will include all freelancers that list "Trados 2007" AND "Trados 2007 Freelancers" but NOT

“Trados SDLX2007”

Tools: trad ☒ Restrict?

Domain: TRADOS ☒

Service: Trados 11 ☒

Trados 2007 ☒

Trados 2007 F...

When “Restrict” is **on**, the freelancers list will be restricted by the tool selected (or any tool the freelancer has whose name contain the string in the Tools box).

When it is **off**, the content of the Tools box will be ignored.

The resulting table can be sorted by clicking on the relevant heading.

2.2 Displaying Freelancers' details

To check further detail about a single freelancer, **double click** on its line in the freelancers table:

Found 8 records

ID	Name	Source Lang	TargetLa
358	Jorge Merino	English	Spanish
521	Maria Gabriela Fulleri	English	Spanish(L

This will open the “Details” tab:

Freelancers Details Email Settings

Name: Jorge Merino

Email: jorgemerinopy@gmail.com

Skype: jorgemerino

Phone: +595-991-750500

Country: Paraguay

Send Email

CA

Date	Completed	LastJob
20/12/2013 11:08	0	Labdata_Mission_EN_ES(Mex)
18/12/2013 09:00	1	IDM_SAP_INTL_F&Q_Userguide_En_ES(LA
18/12/2013 09:00	1	IDM_SAP_INTL_F&Q_Userguide_En_ES(LA

Job in progress

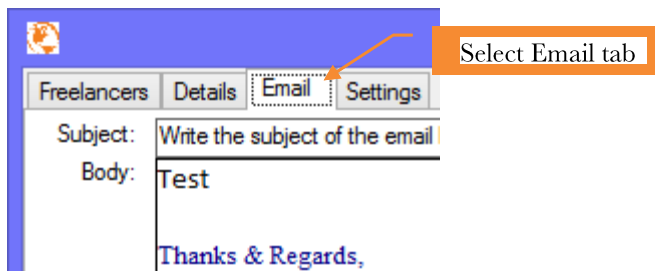
Jobs completed

This panel shows first some details about the freelancer, a button to send an email, and the list of past/current jobs this freelancer has with Mayflower. The jobs are sorted by date by default, and if there are jobs the freelancers is currently working on, they will be shown with a light red background.

2.3 Sending the freelancer an email

The tool can send emails directly to the freelancer. Please note that this is not a full-featured email client, so only basic functionality is provided. It is not possible to send attachments, for example.

The first thing that should be done is to prepare a template email. This can be done in the Email tab:



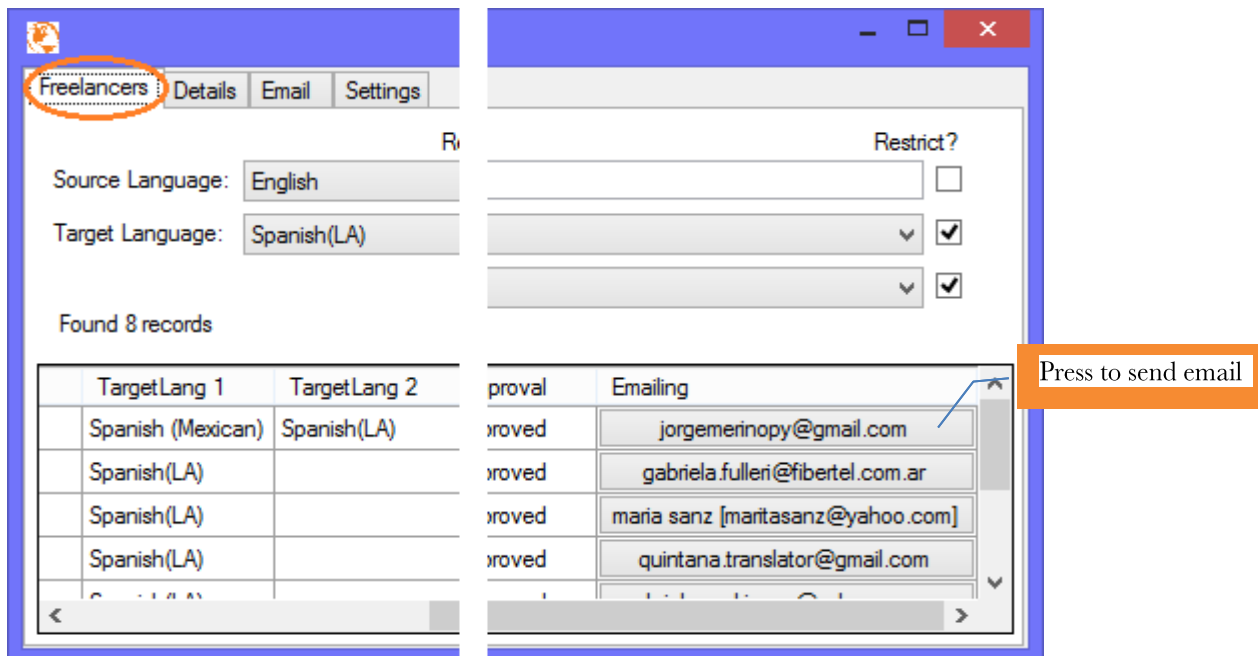
Fill in the Subject and Body fields. It is recommended to copy and paste formatted signatures and/or other fancy text from a word processing program or email client, as this tool only provides basic editing functionality. If needed, it can be accessed by right clicking on the text and a menu will appear with a limited set of formatting capabilities.

NOTE: There is no “Save” button. The text is automatically saved after each modification and will be remembered between runs of the tool.

An email can be sent to a freelancer from two different places: directly from the main Freelancers list and from a freelancer's details tab.

2.3.1 From the main Freelancers' list

To send the predetermined email (as set in the Email tab), scroll to the right and each freelancer has a button which can be used to send an email directly. The freelancer's email appears in the button itself.

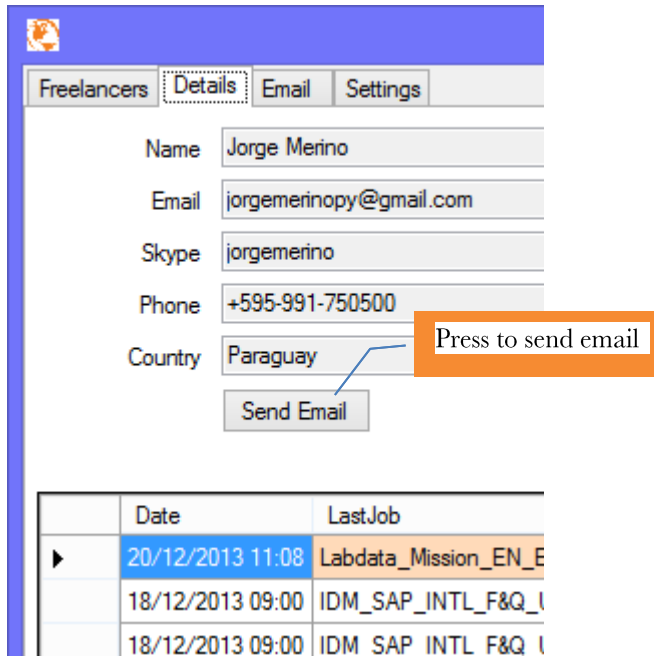


Pressing the button will show a dialog where the email can be customised.

If you need to copy and paste the email address, double click on the relevant freelancer's line in the table, to bring up the details tab, where the email address can be copied.

2.3.2 From the Details tab

Access a freelancer's details by double clicking on their line in the main table.



The screenshot shows a web interface with a blue header bar. Below the header, there are four tabs: 'Freelancers', 'Details', 'Email', and 'Settings'. The 'Details' tab is selected. The form displays the following information:

- Name: Jorge Merino
- Email: jorgemerinopy@gmail.com
- Skype: jorgemerino
- Phone: +595-991-750500
- Country: Paraguay

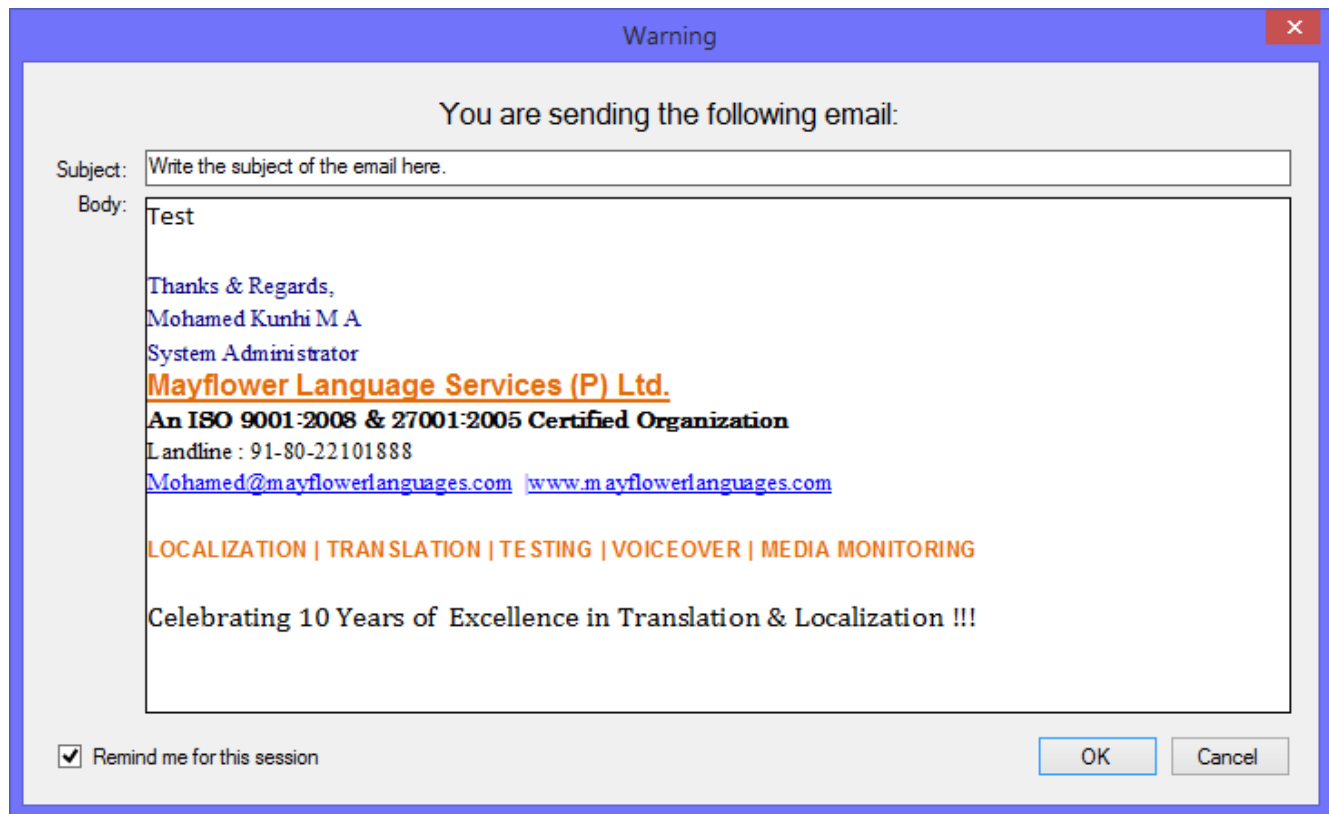
Below the form, there is a 'Send Email' button. An orange box highlights this button, and a blue arrow points to it from a text box that says 'Press to send email'.

	Date	LastJob
▶	20/12/2013 11:08	Labdata_Mission_EN_E
	18/12/2013 09:00	IDM_SAP_INTL_F&Q_U
	18/12/2013 09:00	IDM_SAP_INTL_F&Q_U

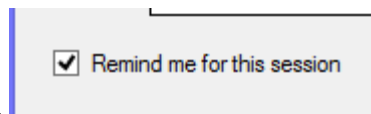
Press the button "Send Email" and a dialog will be shown where the email can be customised.


2.3.3 Customising the email to be sent

Before sending an email, the following dialog window will be shown, giving you a chance to make last-second changes:



After the changes, if any, pressing OK will send the email.



Please note that this dialog will be shown only if the checkbox:  Remind me for this session is checked. If it is unchecked, the email will be sent directly without a chance to review it. It can always be changed from the Email tab anyhow at any time.

3 Changing settings

3.1 Email settings

3.1.1 Server details and own information

In the Settings tab, you must fill in all the details in the “Email Settings” box:

Please enter your real name and email address (these will both be seen by the recipient) and the password (this is your standard mayflowerlanguages.com email password).

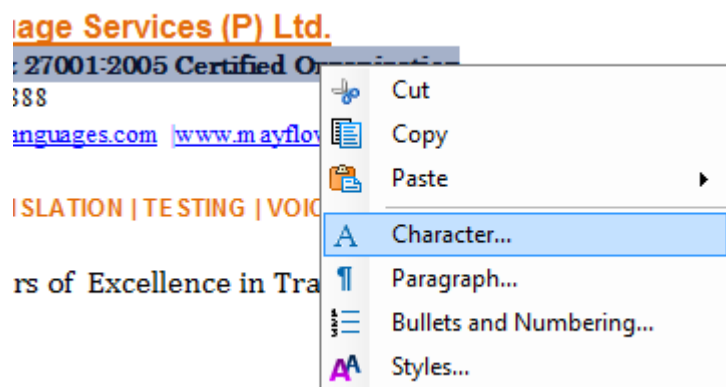
There should be no need to change the Server and Port fields, as these are pre-filled with valid values.

If you check the “Test Mode” checkbox, no email will be sent to the freelancer, though a copy will be sent to yourself, so this is useful for testing, for instance, whether the resulting email will be displayed correctly (w.r.t. formatting, for instance) by recipient. Once satisfied, it can be turned off (this setting is remembered from one run to the next, so once unchecked it will stay unchecked)

3.1.2 Email content

It is useful to prepare a standard email before using the tool, for instance containing your signature. Switch to the Email tab and fill in the fields:

As the editing capabilities of this tool are limited, it is recommended to copy and paste the signature with formatting directly from your email client or from a word processor. A simple editing menu is available by right clicking on a piece of selected text as shown below:



3.2 Projetex server settings

Please be careful as modifying values in this area might render the tool unusable!

✪ This settings should be changed only by your local system administrator. If the status circle is red (meaning no connection is in place), you might be able to restore connection to the database by clicking “Test”, waiting for the circle to turn yellow, then click on “Apply”. This will reset the connection.

Changing setting in this area will make the changes permanent, so if you make a mistake, you will have to ask for the correct details from your system administrator.


Database - HIC SUNT LEONES!

Server Address: 192.168.0.56

Server Port: 3050

Database: E:\Program Files (x86)\AIT\Projetex 9\Projetex Server\Database

Password: ☐ Show

Status: 

character set=UTF8;data source=192.168.56.101;initial catalog="C:\Projetex9\Projetex Server\Database\Projetex.fdb";user id=ODBC;password=pwww;role=PROJETEX_ODBC