
Table of Contents

Part I TO 3000 v.9 Folder Structure	2
Part II Folder Structure Administration in Projetex 7.0	6
Part III Folder Navigation in TO 3000 v.9	7
Part IV FTP folders access	10
Index	0

1 TO 3000 v.9 Folder Structure

Business Folder

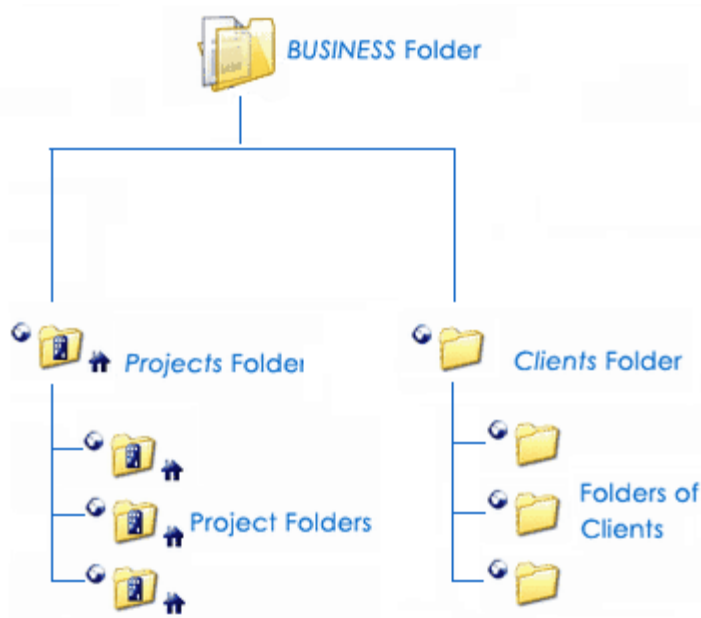
Translational Office 3000 automatically creates and maintains folder structure designed to streamline storage, linking and sharing your work files.

All workflow files (such as *client-sent files* and *files to be sent to clients*, as well as saved documents like *invoices* and *quotes*) are stored in respective subfolders of *Business folder*, a centralized and unified folder.

The main purpose of *Business folder* is to be a centralized storage location for client folders and project folders (these folders are described below). By default it is created in the root of disk *C:*.

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

Folder structure scheme



Different folder types

Business folder contains two folders: *Clients* folder and *Projects* folder.

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

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

These folders, as well as their subfolders are created automatically when a [Translational Office 3000](#) user clicks **Create** button in respective areas of the program (like **Main** tab of **Project** window). [Translational Office 3000](#) can also automatically create such folders when needed.

➔ **Example:** Below you can see the example of working **Translational Office 3000** folder structure:

Sample structure of folders in Translation Office 3000



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 the **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 together with a client folder. These subfolders can be specified on the **Folders** section of **Advanced Settings** tab.

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 the **Main** and **Files** tab of the **Client** window. It is created automatically when any project-related document is saved. Project folder always contains at least three subfolders:

- **Incoming** (where you can store the files sent you by the *client*)
- **Work** (where you can store files while working on them)
- **Outgoing** (where you can put files ready to be sent to the *client*)

Each project's folder can contain custom subfolders which will be created automatically together with an expert folder. These subfolders can be specified on the **Folders** section of **Advanced Settings** tab.

All *client jobs* are stored in project folders, not in client folders, because *project* may contain single *client job* or multiple *client jobs*.

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.

[More Details...](#)

2 Folder Structure Administration in Projetex 7.0

Folder structure administration in [Translational Office 3000](#) is performed with the help of [Translational Office 3000 Server Administrator](#).

Automatic creation of folders for *clients* and *projects* can be customized on **Folders** section of **Advanced Settings** tab. Contents of each of the [Translational Office 3000](#) folders can be customized using respective tab in this section:

Client Folder,

Project Folder.

Automatic folder creation

With the help of automatic folder creation feature for any folder in [Translational Office 3000](#) you can define a number of subfolders to be automatically added 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 **Folders** section of **Advanced settings** tab.

Every time *Client* or *Project* folder is created from [Translational Office 3000](#), 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 **Folders tab**. All changes with these custom folders will not be implemented for *client* with existing *Client 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 name*

Composition of *Project* folder names can be modified on the **Project Folder** tab of the **Folders** tab of [Translational Office 3000 Advanced 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 project folders and does not have effect on other folder names.

3 Folder Navigation in TO 3000 v.9

General Client, Project and Expert Folders windows

General folder windows can be used to access all available folders. These are:



Client Folders – contains *folders of all clients* in database.

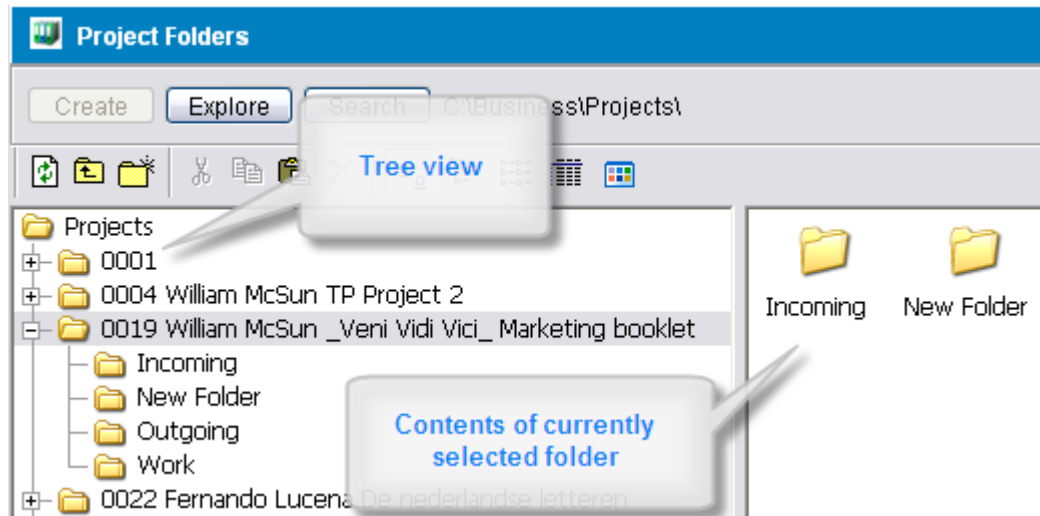


Project Folders – *folders of all projects* can be opened from this window.

All the general folder windows can be opened with the help of [Translational Office 3000](#) navigation bar.

Folders are opened with the help of TO3000 built-in file manager. Interface of [Translational Office 3000](#) 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 and Projects

Files of any particular *client* or *project* can be viewed with the help of **Files** tab, available in each **Client** and **Project** window in [Translational Office 3000](#). File manager interface in this case has more options, like [related folders](#) and [FTP access](#). The screenshot below displays the general elements of file manager. In this case this is the folder of certain *project*, opened by clicking **Files** tab of this project's window.



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 open 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.

Related Folders

Related folders contain information relevant to currently open folder.


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


Project related folders is *Client* folder of selected project.

Related Folders list can also be used to open any folder on local PC, as well as to connect and work with FTP folder, upload and download files.

- Select **Local Folders** option to open folders on local PC.
- Select **Client FTP** to connect and work with FTP folders.

Any option selected in **Related Folders** list is opened in separate field of **Files** tab:

 **Note:** If you change the *client code* (it can be done from the **Main** tab of the **Client** window, [Translational Office 3000](#) will attempt to rename the appropriate folder.

 **Note:** The location of the *Business* folder is specified on the setup stage and can be changed on the **Folders** tab of the [Advanced Settings window](#).

Folder options in Project and Quote editing windows

Edit windows for *quotes*, *projects*, *jobs* etc. have option for quick folder creation — **Create** and **Explore** buttons.

Also some **Edit Job** windows have files access tabs, which can be used to work with related files without the need to switch windows. These tabs are:

- **Project Folder** for client 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. An example of such folder tab is shown below:



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**
- **Client folder** of respective client.

Switching between open folders

Use **Open Folders** drop-down list from the button panel of **Translational Office 3000** interface to easily switch between the folders opened during the current **Translational Office 3000** working session. Any folder you open using **Translational Office 3000** (using **Explore** buttons) is automatically added to the list. When you need to switch, just select the necessary folder in the drop-down list and click **Go** button.


4 FTP folders access

Translational Office 3000 features built-in *FTP client*, which can be used to quickly access *FTP folders* of clients to upload or download workflow files.

To access FTP client:

1. Open **Files** tab of any client or project.
2. In **Related Folders** field select **Client 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 *Translational Office 3000* to log in to this FTP folder, without the need to re-enter access credentials each time you need access to that FTP.

To create a new connection:

1. Click **Manage Connections** button 
2. Select **New connection ...** in the menu which appears:
3. Enter the name of new connection, FTP server address, user name (FTP login) and password (*Translational Office 3000* 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 that FTP server.
 2. Click **Connect** button to display the contents of FTP in the field below.
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