

Context Settings Overview

Introduction

See the [Finder](#) how-to in order to get more information about Finder structure.

Project Setup Video Tutorial

Flash Animation
Image not found, type unknown

<https://www.youtube.com/embed/8TcTGfIfE0>

General Folder Settings

Folders are containers in first level of Finder.

To edit Folder Types, go to Options & Tools > Context Settings

Folders are formed by the following attributes:

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| Folder Type | <p>The basic definition of the Folder. Each Folder Type represents different behaviour (Fixed Type, Form, Status, Workflows, Filtering, Templates, Access, etc.)</p> <p>Folder Fixed Types are: Contact Folder or Simple Folder (both must be defined using MS Win admin interface at Settings > Account & Project > Account Types)</p> <p>Contact Folder (Contact Folder is container that holds any information connected with Contact Type (eg. Employee, Applicant, Client, Supplier, Partner, etc.))</p> <p>Simple Folder (Simple Folder is container that holds any information, without any particular system-based relations)</p> |
| Folder Template | <p>Minimally one per Type. New folders are created based on Folder Templates. The Template defines at least initial Status, which must be set. In more advanced scenarios, Templates may define access rights of newly created folders and add different Forms to new folders.</p> |

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| Folder Status | <p>The Folder Status represents actual state of the component in relation to particular company / person or just a simple folder.</p> <p>Status is Custom & Fixed. Custom Status may be created by user (admin), Fixed Status is: "Initial, Active, Closed".</p> |
| Folder Relations | <p>Folder relations define relation to another Sub-folder in Finder, to Project created under the Folder and to completely different Folder Types.</p> <p>In order to start entering new relations, you must have other Project Templates, Folder Templates or Folder Types ready.</p> <p>Folder Type > Folder Template Folder Type > Project Template Folder Type > Folder Type</p> |
| Form | <p>There are two forms per Folder available - one based on Folder Type and another based on Folder Template. Both must be configured using MS Win admin interface.</p> <p>To set the Form per type, go to Settings > Account & Project > Account Types > select and edit the type > select or create new Form (see Forms Configuration section)</p> |
| Folder Numbering | <p>Each Folder Type may be differently numbered. (See Numbering Configuration section)</p> |

Project Folder Configuration

Prerequisites

Project Folder may be created only under General Folder based on General Folder's relations settings. In General Folder's relations settings, you should add the Project Folder Template, once you would like to create the Project Folder under the General Folder (Client, Partner, etc.).

Project Folder Type

Project Folder type may act in several business scenarios. Project Folders are used to track several kinds of projects. Some examples might be:

Project Folder Base Types

Project Folder Base Types are: Simple Project, Master Project & Slave Project.

Simple Project Folders Examples

- Sales Opportunity
- Implementation (of information system?)
- Consulting
- Support
- Services, ...

Master Project Folders Examples

- Campaign
- Vacancy
- PR Activity
- Training Services

Slave Project Folder Examples

- Campaign Member (for Campaign)
- Selection Procedure (for Vacancy)
- Target Editor (for PR Activity)
- Student (for Training Services)

Project Folder Templates

In order to create new Project Folder, you must have at least one Project Folder Template, which indicates (at least) initial Status. Optionally it can indicate also default Provider & Customer (for Billing).

MS Windows administration client includes some other options as well, for instance Default Price List setting, custom Access Rights setting & more.

Project Folder Status

You can define your own set of Project Folder States, incl. its color in Finder, priority indicating it's sort order.

Fixed Status indicate the Finder's Base Statuses: Initial / Active / Closed, and therefore as well the visibility of such a Project Folder in Finder.

Project Folder Relations

This option provides you the possibility to allow one or more Activity or Milestone Folders to be created under the Project Folder. Activity Folder Template should be assigned to the Project Folder Type. Each Activity Folder may be created automatically, when the Project Folder is created. In order to allow auto-creation of Activity Folder under Project Folder, you should select "Create" flag in Project Folder Relations next to each Activity Folder.

Project Forms

Project Forms are customizable panels containing several form components, incl. Tabs, Edit Fields (numeric, text, integer), Checkboxes, Combo Fields, Memo Fields, ListBoxes, etc.).

Project Form by Type

MS Windows admin interface allows you to set one global form to be set on Project Folder Type.

Project Form by Template

MS Windows admin interface allows you to set one custom form to be set on Project Folder Template.

Project Folder Numbering

MS Windows admin interface allows you to set Numbering for the Project Folder Type. By applying Numbering to Project Type, new number is automatically added to each Project Folder created in Atollon (Job Numbering for advertising agencies).

Project Folder Roles

In MS Windows admin client, you can set list of Project Roles that are allowed for Project Folder Type.

Project Folder Dimensions Settings

Project Folder Type may set whether Dimension 1, 2, 3 is optional, required or silent (assigned automatically).

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