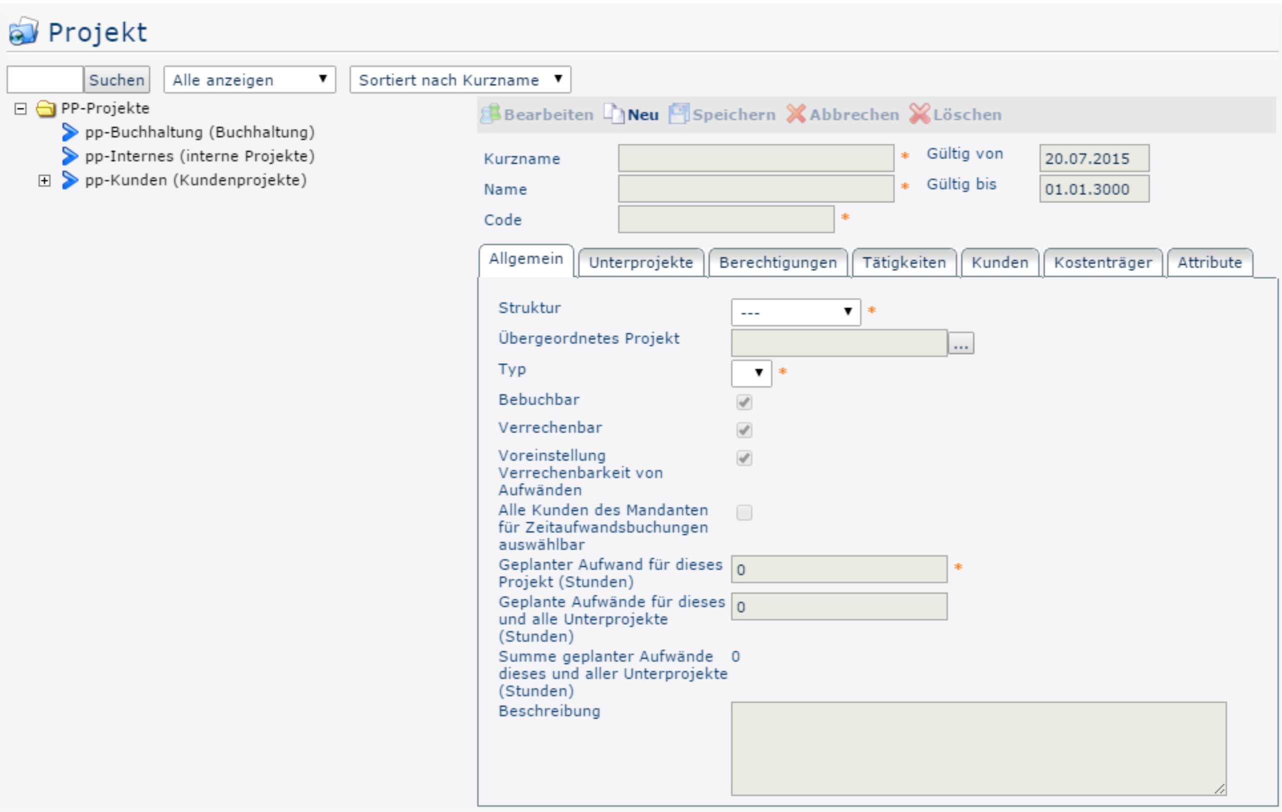
New Project

General information

A click on "**New project**" starts the process for creating a new project.

The following input mask then opens:



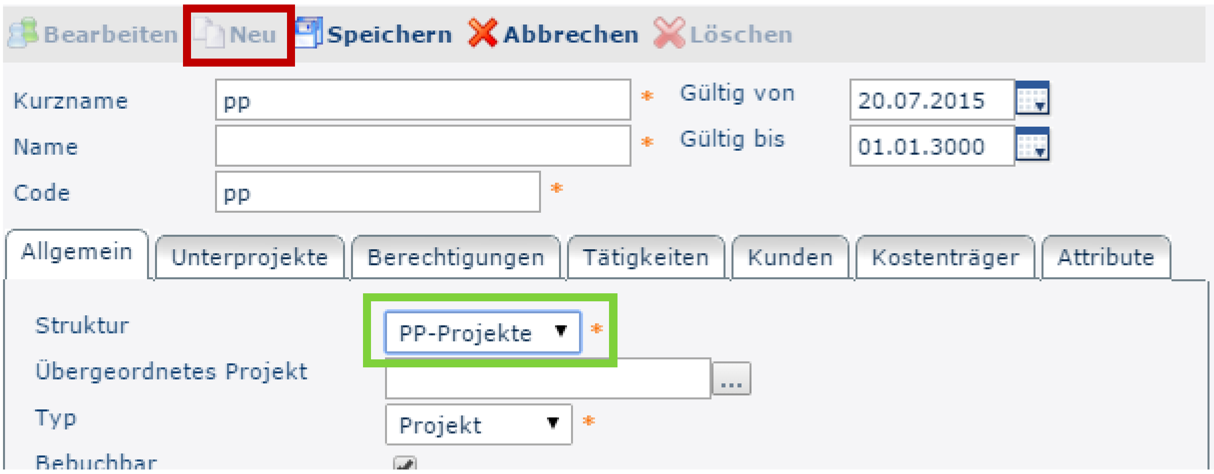
Tab: General

Fields marked with an orange asterisk are mandatory, while fields not marked are optional.

The editing must first be activated by clicking on **New**.

Then the previously greyed out fields (**Save** and **Cancel**) can be used freely.

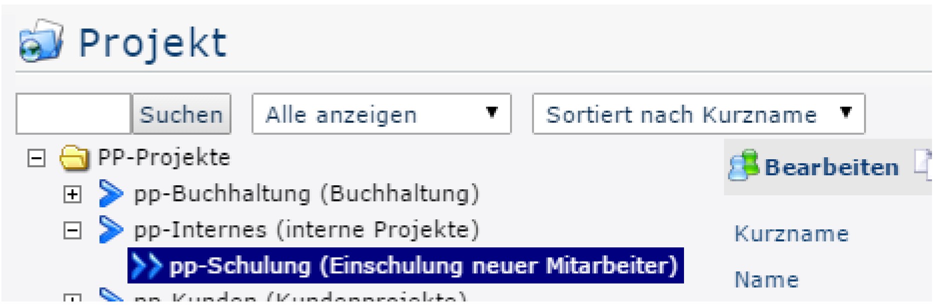
As the next step, it is advisable to select the structure, since this automatically inserts the client abbreviation in the corresponding fields:



*In the above screenshot 1. the (now grayed out) button **New** was clicked and 2. the **structure** PP-Projects was selected.*

After selecting the structure, the fields **short name** and **code** are automatically filled with the unchangeable client-specific prefix (in this example "PP"). Apart from these two prefixes, the **short name** and **code** are freely selectable - but must be unique within the company.

- **Short name**
- **Name**
- The freely chosen, meaningful (long) name under which the project runs
- **Code**
  A freely selectable combination of letters and numbers that begins with the prefix like the short name.
- **Structure**
  This is to be understood as the path under which the respective project can be found. Also starting with the prefix. As a rule, only one structure is created per client.
- **Parent project**
  This parameter can be used to determine whether the new project is subordinate to an existing one. As soon as a superordinate project has been selected, only *subprojects* can be selected from the dropdown **type**. If a parent project is specified, **No** is displayed in the Top Level column of the Project Master Sheet (see Overview[1]).
  The new project is also displayed in sequence in hierarchical views (as when searching for a project) below the parent project (see following screenshot):



- **Bookable**
  This checkbox determines whether authorized users can book project times on this project. For more information, see Authorizations
- **Billable**

Indicates whether it is an allocatable project (for example, customer projects) or a non-allocatable project (for example, internal projects).

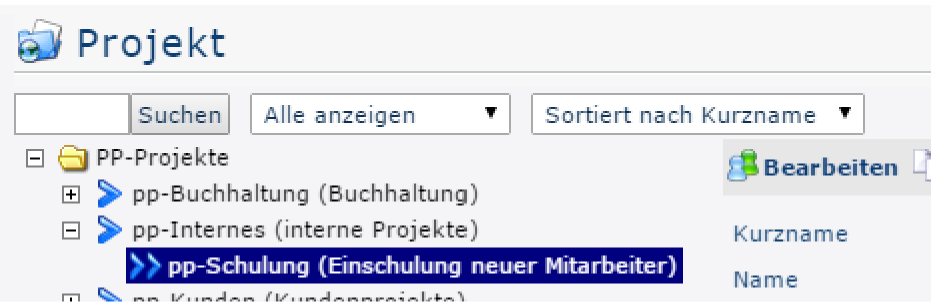
- **Default setting Billability of expenses**
  With the help of this checkbox, you can determine whether all project time bookings made on the corresponding project are billable or not. The user can easily change this when booking (if for some reason non-chargeable services have to be booked to the project).
- **Planned effort for this project (hours)**
  This is the number of hours expected to be needed to complete the project.
- **Planned effort for this and all subprojects (hours)**
  This is the time taken in hours to complete this project, including all its subprojects. In the case of the customer projects project, this value results from the sum of the planned expenditure for **customer projects** and the planned expenditure for the subproject of the same, **Workflow EDV**
  This value can be overwritten.
- **Sum of Planned Expenses for this and all Subprojects**
- Here the sum of the planned efforts for this and all subprojects is displayed.
- In the case of the project customer projects, this value results from the sum of the planned expenditure for **customer projects** and the planned expenditure of the subproject of the same, **Workflow EDV**
- **Description**
  Any text can be entered here for a more detailed description of the project.

Once all fields have been filled in, the project can be created by clicking on **Save**. The successful saving is confirmed with a corresponding message (project 'XY' was saved successfully!). The project now appears in the project master sheet and can be edited at any time.

Tab: Subprojects

This tab provides an overview of the project hierarchy (higher-level / lower-level projects).

Example



First a project is selected. To find your way around longer lists, you can search for the project and also sort it by short name, name or code.

In the **Subprojects** tab, the corresponding subprojects (if available) are then displayed in bold under the selected project (in this case pp training).

Tab: Permissions

After a click on this tab the following mask opens:

The default configuration shown in the screenshot above specifies that:

- Standard **Users** (members of the PP-PTM-Usr group) and Standard **Managers** (members of the PP-PTM-Mgm group) can only enter **bookings** on the selected project.
- **Project Managers** (members of the PP-PTM-ProjMngr group), and **Administrators** (members of the PP-PTM-Admin group) also have authorization for reports, which means that they can query **reports**.

Click on **Add permissions** to add another permission to the table. For example, individual persons could also be assigned the **Book** permission or individual persons could be excluded from booking / reporting on / about this project using the **Negative** permission.

Explanation of the table columns:

- **Permission type**
  The permission can be applied in different sizes:
  - for the whole **client** (company)
  - for a specific **group** (department)
  - For a single **person** (employee in a group)
  - For a **role** (all employees with a specific role assignment)
- **Executor**
  Depending on which **permission type** was selected, you can choose from a list or by entering
  - the **client**
  - the **group**
  - the **person**
  - or the **role** that is to receive the authorizations to be selected in the sequence
- **Inheritance**
  Only available for authorization type **Group**! If this parameter is checked, the configured authorizations also apply to all subgroups of the selected group.
- **Negative**
  This can be used, for example, to exclude individual groups or persons from the permission.
- **Booking**
  All **performers** with a check mark here can make project time bookings on the respective project.
- **Booking change**
  This function is currently not used.
- **Change**
  This function is currently not used.
- **Valid from and Valid to**

With these parameters the validity period of the authorizations can be limited - without input automatically the current date and the 01.01.3000 are accepted.

- **Delete**
  By clicking on the **delete** icon you can delete an authorization (in the corresponding line)

Tab: Activities, Customers, Cost Objects, Attributes

These tabs are only used in special cases on customer request.

1. /daisy/personalwolke-admin/7004-dsy.html?language=4