Projects Overview

General information

Under the menu item **Projects** you will find an overview of all created projects of the client (company).
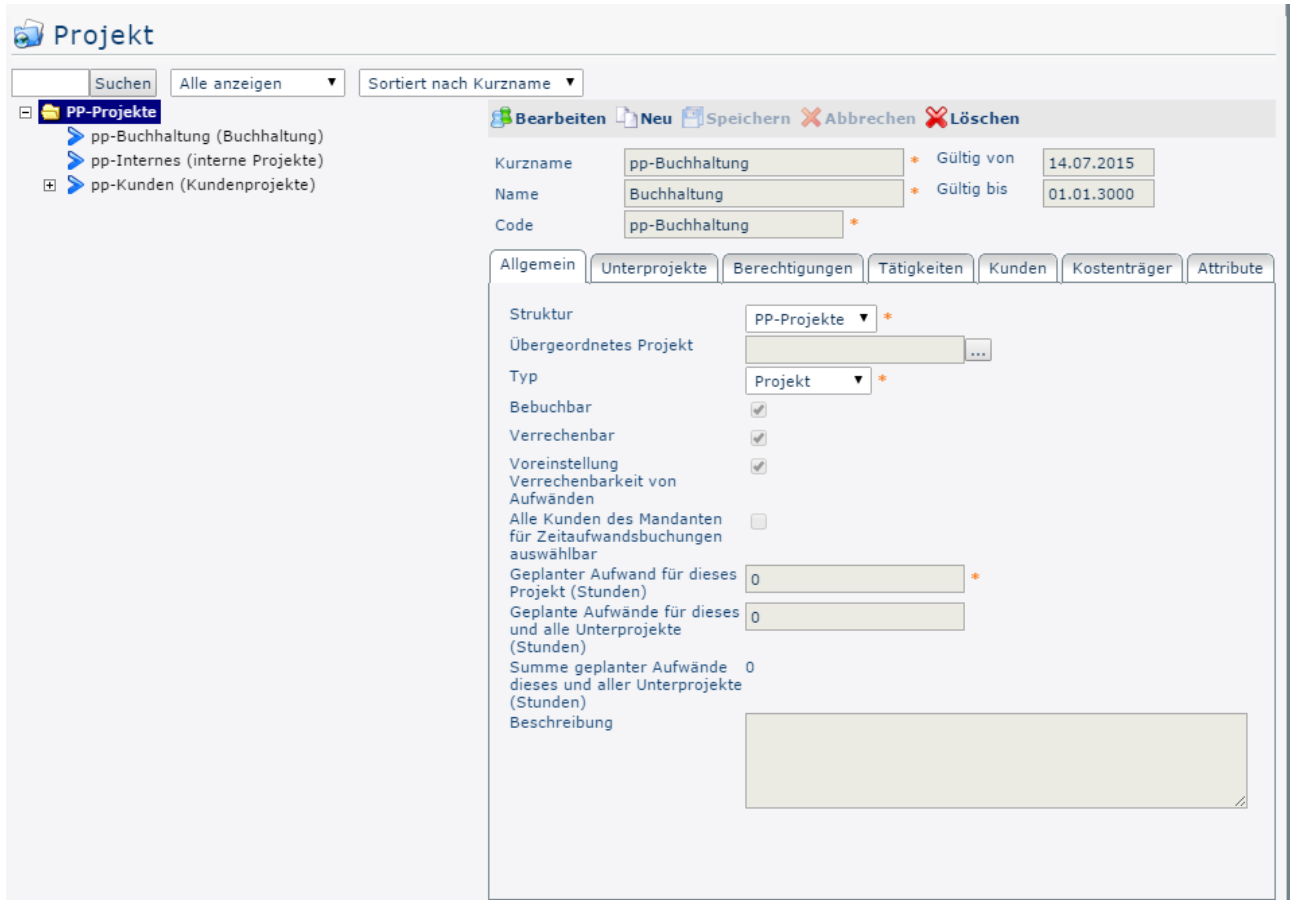

- **Short name**
  This refers to the abbreviation of the project including the fixed prefix that stands for the client (e.g. pp for PersonalwolkeProfessional).

- **Name**
  The freely chosen, meaningful name under which the project runs.

- **Code**
  In this case, the code is the same as the short name - however, a freely selectable letter/number combination could also be selected after the prefix.

- **Top level**
  Indicates whether the project is at the top of the hierarchy as a project (**Yes**), or as a subproject (**No**).

- **Type**
  This is again about the hierarchical subdivision into **projects** (marked
  with ▶   )
  and **subprojects** (marked
  with ▶▶   ).

- **Bookable**
  This column indicates whether the user can make project time bookings for the corresponding project (**Yes**) or not (**No**).

- **Structure**
  This is to be understood as the path under which the respective project can be found. Also starting with the prefix.

- **Planned effort**

- **Total planned expenses**
  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**

Project master data sheet

A click on the edit

symbol take

you to the project master data sheet, where you can change data concerning the project / delete projects / create new projects. An explanation of the individual fields and tabs can be found under New Project[1].

Sorting / Search options

This list can be sorted in ascending or descending order using the blue triangles

( )

and according to various criteria (short name, name, code, top level, type, bookable, structure, planned effort, total planned effort).

In addition, the white text fields at the beginning of the list offer the possibility to restrict the displayed data records according to various criteria, e.g.: Short name "bu" only shows projects whose short name contains "bu" ("bu" in the text field and start search with Enter / Enter

key / click).

To make all records visible again, simply delete the search term from the corresponding

field and

press Enter again.

Practical Functions

By clicking one of the 3

icons   in
the upper right area, the following dialog box opens to specify the data to be displayed in the selected medium (print, PDF, Excel):

Output range

- *All Records*
  All company projects are displayed in the selected output medium.
- *Current section*
  Only the currently displayed projects of the company are displayed in the selected output medium.

Open in new window

- *new window*
  The selected data sets are displayed in a new window.
- *current window*
  The selected data sets are displayed in the current window.

This function is also useful if you want to export a list of projects, possibly filtered according to various criteria. The Excel format is suitable for this.

1. /daisy/webdesk-manual-admin/7006-dsy.html?language=4