## **General information**

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

💰 Projel	kte		
Neues Proj	ekt		
Kurzname	<del>ب</del> ش	Name	\$ Cod
9			
🚺 pp-Buchhal	tung	Buchhaltung	pp-E
🥕 nn-Interner		interne Projek	te nn-l

The following input mask then opens:

🧊 Projekt		
Suchen Alle anzeigen 🔻	Sortiert nach Kurzname 🔻	
	Bearbeiten    Neu    Speich      Kurzname    Name    Code      Allgemein    Unterprojekte    Ber      Struktur    .    .      Übergeordnetes Projekt    Typ    .      Bebuchbar    .    .      Verrechenbar    .    .      Voreinstellung    .    .      Aufwänden    .    .	
	(Stunden) Beschreibung	ħ

## 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:

Bearbeiten 🖣	Neu Speich	ern 💢 Abbrech	en 🎖	Löschen		
Kurzname Name	pp		*	Gültig von Gültig bis		
Code	рр	*				
Allgemein	erprojekte Bere	echtigungen Tä	tigke	eiten Kunder	Kostenträger	Attribute
Struktur Übergeordnetes		P-Projekte ▼ *				
Тур	P	rojekt 🔻 *				
Bebuchbar						

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<sup>1</sup>).

The new project is also displayed in sequence in hierarchical views (as when searching for a project) below the parent project (see following screenshot):

🥪 Projekt	
Suchen Alle anzeigen 🔻 Sortiert nach K	urzname 🔻
🖃 😋 PP-Projekte	🗯 Bearbeiten 🗳
표 ≽ pp-Buchhaltung (Buchhaltung)	
🖃 ≽ pp-Internes (interne Projekte)	Kurzname
>> pp-Schulung (Einschulung neuer Mitarbeiter)	Name
💷 💊 na Kuadaa (Kuadaaarajakta)	Hume

#### 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).

Bearbeiten 🗅 Neu 🗐 Speichern 💥 Abbre	chen <mark>XLöschen</mark>		
Curzname pp-Internes lame interne Proje Code pp-Internes Allgemein Unterprojekte Berechtigungen	*	Gültig von      14.07.2015        Gültig bis      01.01.3000        ttribute	
Projekt	Geplanter Aufwand für dieses Projekt (Stunden)	Geplante Aufwände für dieses und alle Unterprojekte (Stunden)	Wirklicher Aufwand für dieses Projekt (Stunden)
pp-Internes (interne Projekte)	0,00	0,00	164,19
pp-Schulung (Einschulung neuer Mitarbeiter)	67,00	67,00	0,00
	67,00	67,00	164,19

# Tab: Permissions

After a click on this tab the following mask opens:

Unterproj	ekte Ber	echtigun	gen [	Tätigkeiten	Kunden	Kostenträger	Attribute					
ungstyp	Ausführe	nder	Verer	ben Nega	tiv Buchen	Umbuchen	Verändern	Berichten	Gültig von		Gültig bis	Löschen
	PP-PTM-Ad	min							31.07.2015		01.01.3000	
	PP-PTM-Mg	Im							31.07.2015	5	01.01.3000	
	PP-PTM-Pr	ojMngr							31.07.2015	5	01.01.3000	
	PP-PTM-Us	r							31.07.2015	5 IIV	01.01.3000	
Berechtigung hinzufügen												
erechtigur	ngen											
nder	Vererben	Nega	itiv	Buchen	Umbuchen	Verände	rn Beric	hten Gü	ltig von	Gültig l	ois Zugeord	net von
	ungstyp ng hinzufü erechtigur	ungstyp Ausführen PP-PTM-Ad PP-PTM-Mg PP-PTM-Us ng hinzufügen erechtigungen	Ausführender PP-PTM-Admin PP-PTM-Mgm PP-PTM-ProjMngr PP-PTM-Usr ng hinzufügen	Ausführender  Verer    PP-PTM-Admin     PP-PTM-Mgm     PP-PTM-ProjMngr     PP-PTM-Usr	ungstyp  Ausführender  Vererben  Nega    PP-PTM-Admin  Image: Imag	Ausführender  Vererben  Negativ  Buchen    PP-PTM-Admin  Image: Constraint of the second of th	Ausführender  Vererben  Negativ  Buchen  Umbuchen    PP-PTM-Admin  Image: Construction of the second digent of the se	Ausführender    Vererben    Negativ    Buchen    Umbuchen    Verändern      PP-PTM-Admin    Imagenetision    Imagenetision	Ausführender    Vererben    Negativ    Buchen    Umbuchen    Verändern    Berichten      PP-PTM-Admin    Image: Image	Ausführender    Vererben    Negativ    Buchen    Umbuchen    Verändern    Berichten    Gültig von      PP-PTM-Admin    Image in the state    Ima	Ausführender    Vererben    Negativ    Buchen    Umbuchen    Verändern    Berichten    Gültig von      PP-PTM-Admin    Image in the second of the second o	Ausführender    Vererben    Negativ    Buchen    Umbuchen    Verändern    Berichten    Gültig von    Gültig bis      PP-PTM-Admin    Image: Construction of the state of the st

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/webdesk-manual-admin/7004-dsy.html?language=4