### **General information**

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

🐼 Projekte 🚔 🗟 🕱									
Neues Projekt 5 Einträge Zeilen 20									
	Kurzname 🖨	Name 🜲	Code 🗘	Oberste Ebene	Тур	Bebuchbar 🖨	Struktur 🕏	Geplanter <del></del> Aufwand	Geplanter Aufwand gesamt
9						•			
/	pp- Buchhaltung	Buchhaltung	pp- Buchhaltung	Ja	> Projekt	Ja	PP-Projekte	16	16
/	pp-Internes	interne Projekte	pp-Internes	Ja	> Projekt	Ja	PP-Projekte	0	67
1	pp-Kunden	Kundenprojekte	pp-Kunden	Ja	> Projekt	Ja	PP-Projekte	30	42
/	pp-Schulung	Einschulung neuer Mitarbeiter	pp	Nein	<b>》》</b> Subprojekt	Ja	PP-Projekte	67	120
<u>/</u> )	pp-Worklfow	Workflow EDV	pp-Workflow	Nein	<b>&gt;&gt;</b> Subprojekt	Ja	PP-Projekte	12	12

• 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 🎽

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<sup>1</sup>.

🔊 Projekt					
Suchen Alle anzeigen 🔻 Sortiert nach K	urzname 🔻				
PP-Projekte     pn-Buchhaltung (Buchhaltung)	Bearbeiten 🗅 Neu 🗐 Spei	chern 💥 Abbrechen 💥 Löschen			
<ul> <li>PP-Projekte</li> <li>pp-Buchhaltung (Buchhaltung)</li> <li>pp-Internes (interne Projekte)</li> <li>Pp-Kunden (Kundenprojekte)</li> </ul>	Kurzname     pp-Buchhaltum       Name     Buchhaltung       Code     pp-Buchhaltum       Allgemein     Unterprojekte     B       Struktur     Übergeordnetes Projekt     B       Typ     Bebuchbar     Verrechenbar       Voreinstellung     Verrechenbar     Nafwänden       Alle Kunden des Mandanten     für Zeitaufwandsbuchungen     auswählbar       Geplanter Aufwände für dieses     Projekt (Stunden)     Geplante Aufwände für dieses       Unterprojekte     (Stunden)     Geplante Aufwände für dieses	g Gültig von 14.07.2015 Gültig bis 01.01.3000 g * erechtigungen Tätigkeiten Kunden Kostenträger Attribute PP-Projekte * Projekt * Ø Ø 0 *			
	Summe geplanter Aufwände dieses und aller Unterprojekte (Stunden) Beschreibung				

## 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.

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Deues Projekt 20 Zeilen 20									1 Eintrag Zeilen 20
	Kurzname 🗧	Name 🜲	Code 🔶	Oberste Ebene	Тур	Bebuchbar 🖨	Struktur 🗘	Geplanter 🔶 Aufwand	Geplanter Aufwand gesamt
9	bu					•			
/	pp- <mark>Bu</mark> chhaltung	Buchhaltung	pp-Buchhaltung	Ja	≫ Projekt	Ja	PP-Projekte	0	0

## **Practical Functions**

By clicking one of the 3

# icons 📥 🔁 🗙

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.

 $1. \quad /daisy/personal wolke-default-en/6899-dsy/g2/g1/g1/7006-dsy.html$ 

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