Manual

myparm

Project Module

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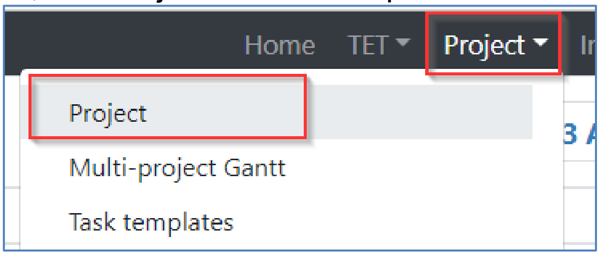
Status: 01/2025

Contents

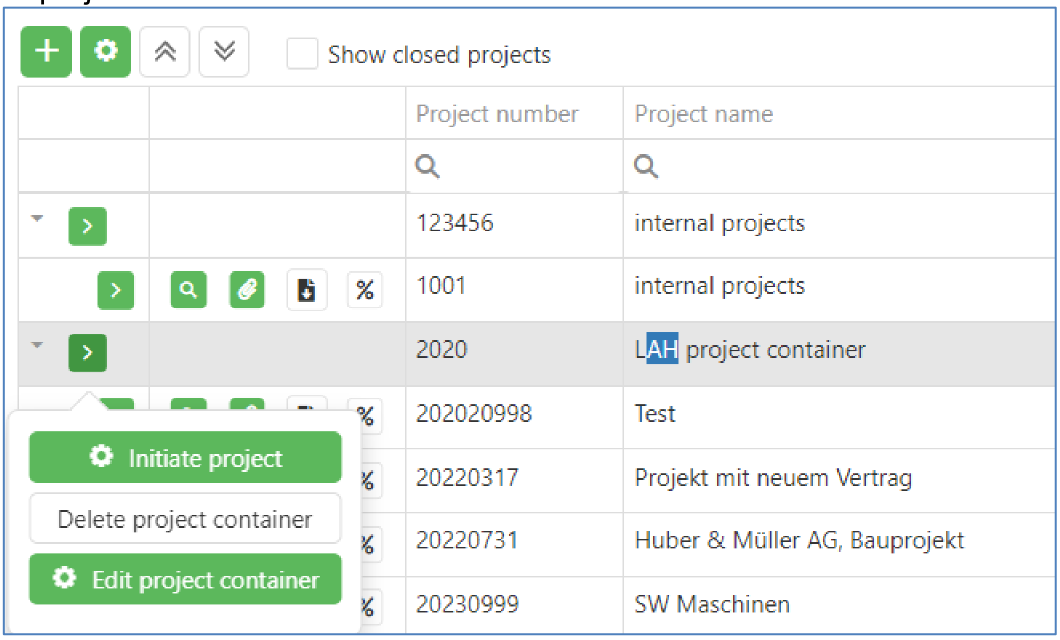
Create project and structure

1. Create new project

To create a new project, the 'Project' module is opened.



At the top level are the project containers, the contents of which are the projects. Project containers can be created freely, by customer, by product, etc. The container in which a new project is to be added is now selected.
The green arrow on the far left is pressed with the left mouse button and the command "Initiate project" is selected:



1.1 Standard Information

A form opens. At least all red fields must be filled in completely.

Project attributes

Active:	Active tick is set by default
Project container:	Shows the container that was selected and in which the new project is to be created.
ORG assignment:	The organization to which the new project belongs is selected.
Project number:	If the organization is selected, the next free number and the project abbreviation for the new project then appear automatically, provided this has been previously defined in the system. If not, a freely chosen number that has not yet been assigned can be entered.
Project name:	Enter the name of the project.

Project short:	If this is defined in the settings, the project shortcut will be generated automatically. Otherwise, it can be entered manually. The abbreviation must not already be used for another project.
Start date:	Is always "today" by default and can be overwritten.
End Date:	Date of the end of the project.
Project calendar:	Selection of the available project calendars. The calendar is required so that the project can be displayed correctly in the Gantt.
Project template:	Here it is defined whether a template should be used for the project. The desired project can be selected from the templates and then this is created in the selected structure.
Project calendar:	The necessary project calendar is selected.
Project template:	Here it is defined whether a template should be used for the project. The desired project can be selected from the templates and then this is created in the selected structure.

Project attributes (2nd part)

Portfolio:	Does the project belong in a portfolio?
Country:	The country in which the project is being processed can be defined.
Project type:	Selection of possible project types (customer project, internal projects).
Several customers:	If the project has several customers, the check mark can be ticked.
Customer:	If the project has only one customer, this can be selected here.
Project phase:	idea, concept, offer, etc.
Probability in %:	The field describes the probability that the project will be carried out.
Comment:	A comment can be recorded.

Company fields

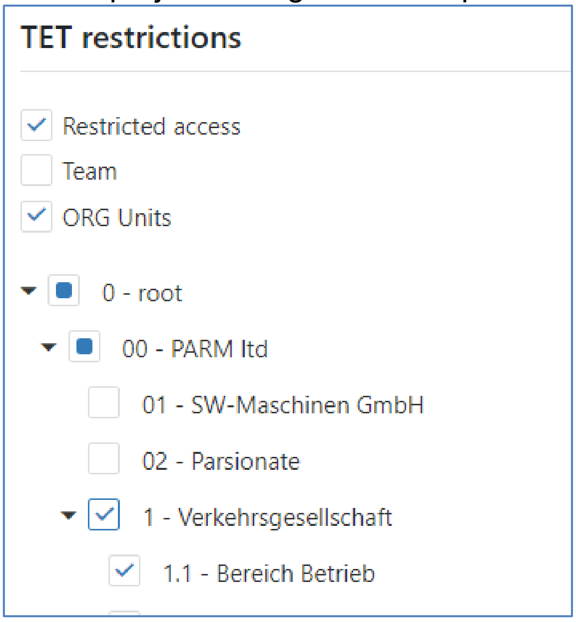
Company fields:	If company fields have been defined by the customer at project level, these are displayed and filled out on the right-hand side.

TET restrictions

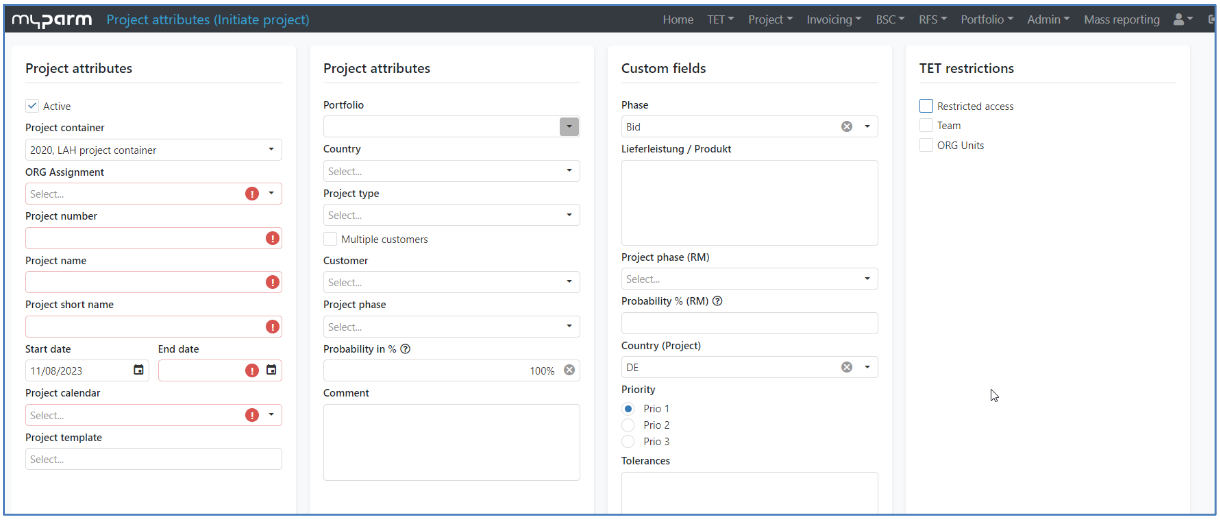
It is defined whether there should be restrictions on visibility for employees when reporting hours and expenses. By default, no restrictions are defined.

However, if there are areas or other companies in the same instance in the organizational structure that are not allowed to record hours on projects, they can be defined here.

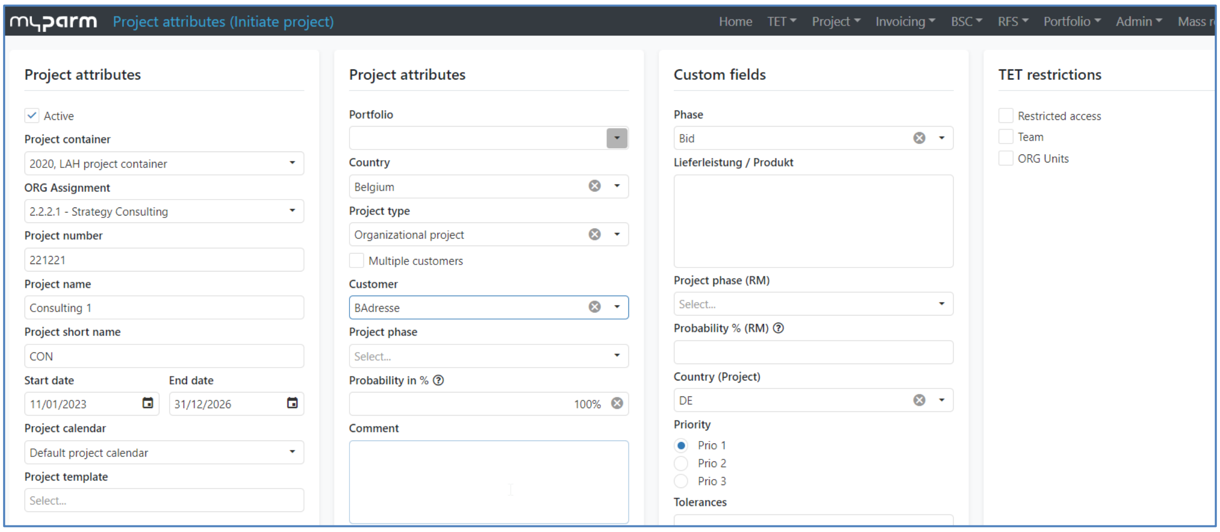
In the example below, only employees assigned to “1 – Verkehrsgesellschaft”, can report hours and expenses to projects assigned to this profit centre.



Before:



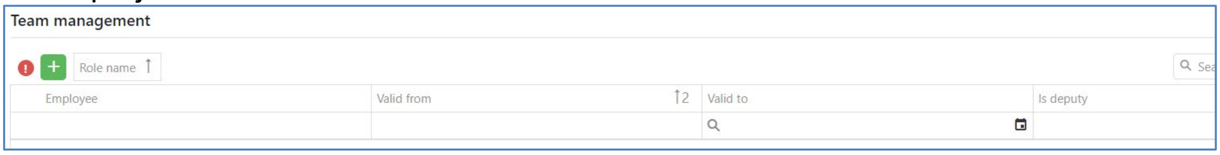
Afterwards:



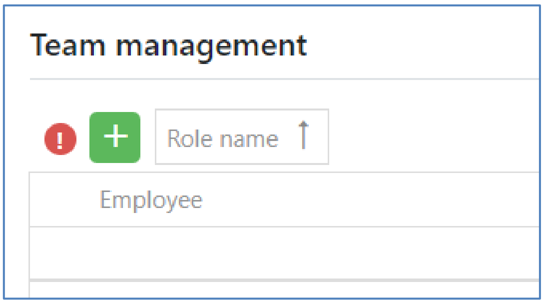
If you scroll down a little further, the team management appears.

Team management

Each project requires a valid project manager and, depending on the setting, additional mandatory roles. A project manager is valid if his entry date is the same as or before the start date of the project. A project manager with an entry date after the start date of the project is not valid.

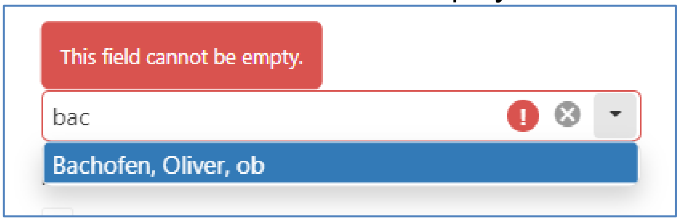


Allocation of the team:

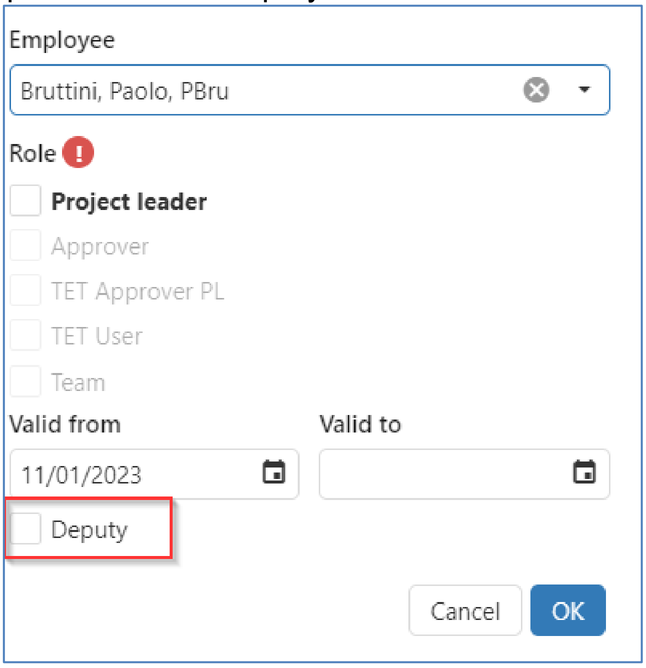


Press the green plus. Depending on the setting, there are roles that must be assigned. These are displayed in bold.

The name of the project manager is searched for. It can be written directly into the field, or the employee can be selected from the displayed list.

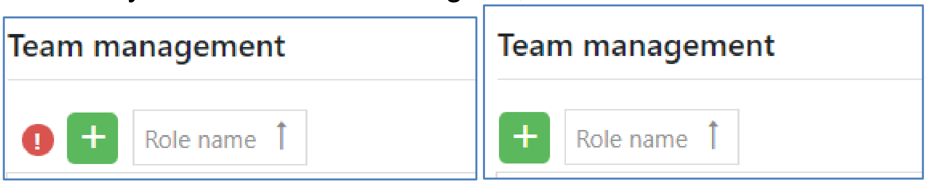


Roles that must be assigned appear in bold in the 'Role' list. If the selected employee is a deputy, a tick is placed next to 'Deputy'.

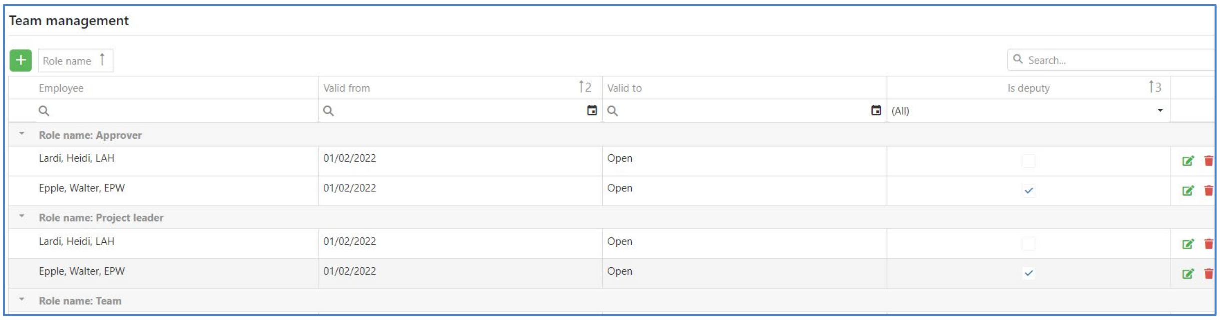


"Valid from" is the start date of the project. ***If a project has a start date in the future, the 'Valid From' date must be changed to 'today'***. Otherwise, the project manager cannot see this project until the date is reached.

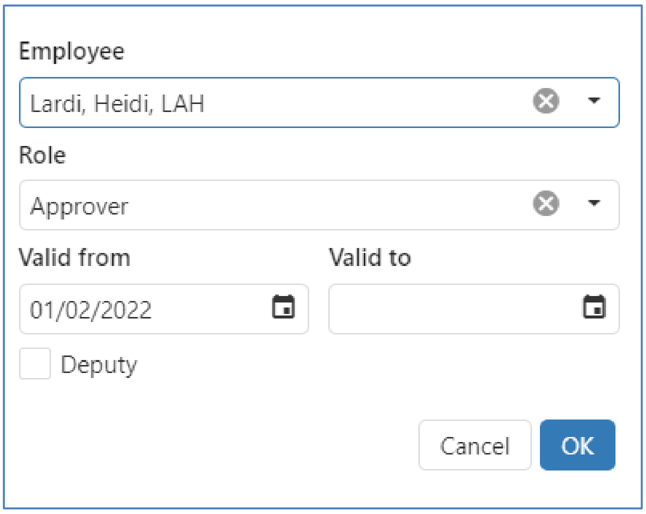
When all mandatory roles have been assigned, the red exclamation mark disappears.



The recorded employees are now listed according to roles. It can also be filtered by roles.



These entries can be changed or deleted.
The corresponding symbols are displayed on the right-hand side for this purpose: pencil to change, red bucket to erase.
You can search in all columns.
A window opens for changes.



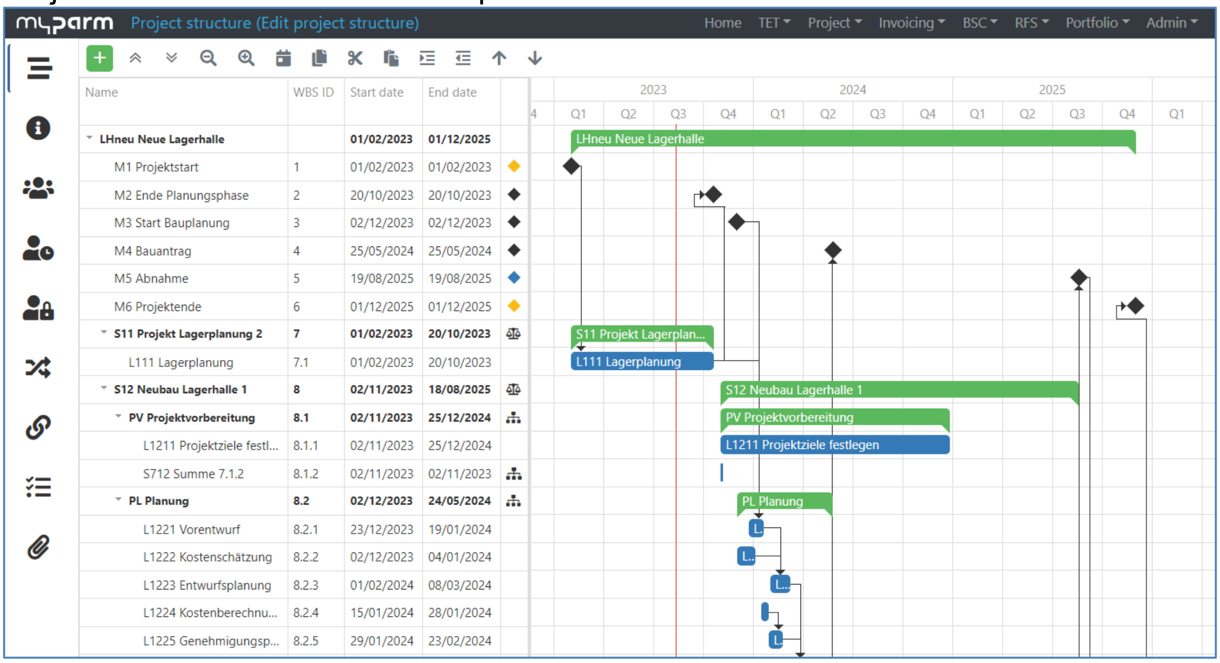
Once all the required fields have been filled out, press the symbol up with your thumb. The project is created, and the next step "Project Structure" opens automatically.

2. Create project structure

It is possible to adjust the project and its structures in the Gantt view and to fill the tabs accordingly.

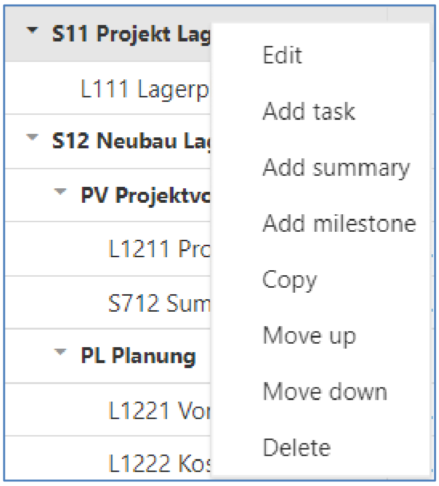
If a project template is selected in the first step «Create project», this structure is now already available and can be supplemented, changed, new elements added, or existing ones deleted.
If this is not the case, you can start building the project structure from scratch.
The structure of the project depends on many factors. How does the project manager have the best control over the costs on the project, does the customer have special needs, how are invoices issued, etc., can individual elements be completed independently of one another, and the control would then no longer apply. Profit & Loss is always booked on the PLA. This can be set so that the profit and loss achieved is automatically posted monthly or only when a PLA is closed.

Project structure created with template.



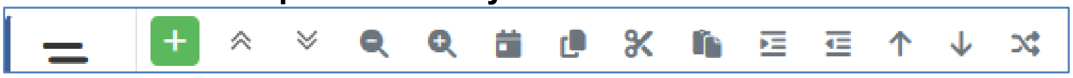
If no template is used, the project structure can now be mapped on the green field.

On the left is the navigation menu with the corresponding symbols. The blue vertical line on the far left of the icon shows where you are.
If you click on a project structure element with the right mouse button, various commands appear:



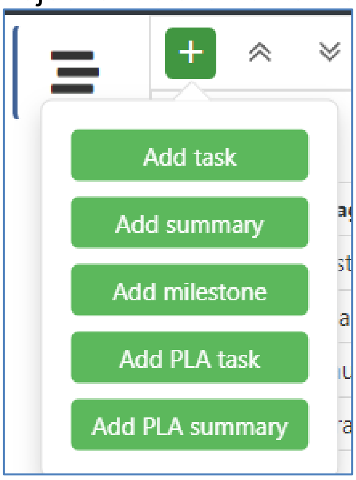
«Edit» opens the pop-up for editing the various tabs.
«Delete» deletes the corresponding element. The red trash can have been removed.

2.1 General explanation of symbols

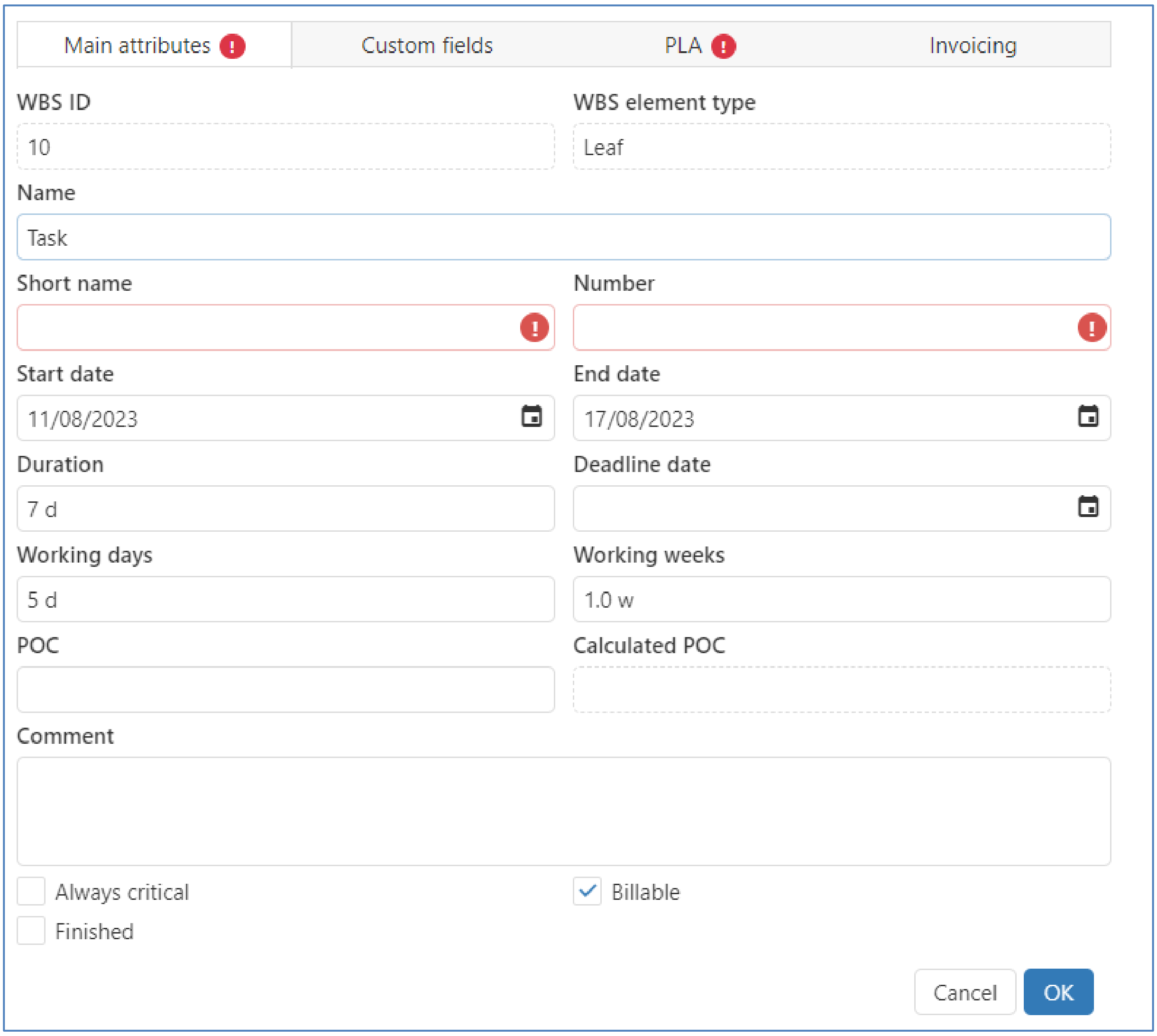


If the top icon of the navigation menu is selected, it shows the Gantt view of the project.

Within the green plus are the project structure items that can be added.

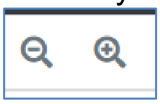


A pop-up opens that corresponds to the selected project structure element and is to be filled out.

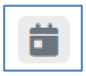


The following symbols are used to expand or collapse the structure:

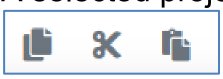
These symbols are responsible for zooming in and out in the Gantt:



Go to "Today" in the Gantt view:



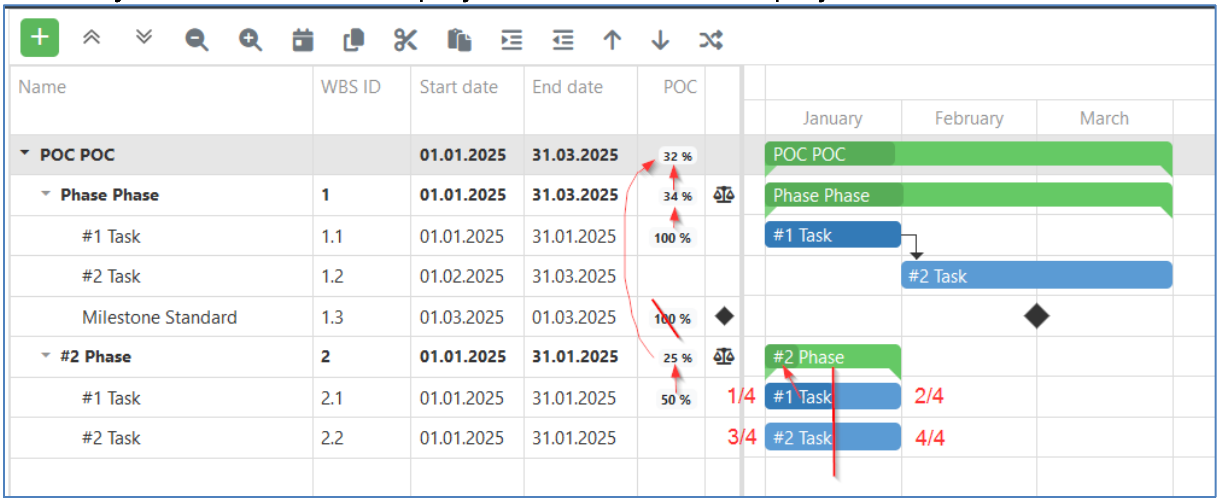
A selected project structure element is copied, cut, or pasted:



A selected project structure element is moved up or down one level:

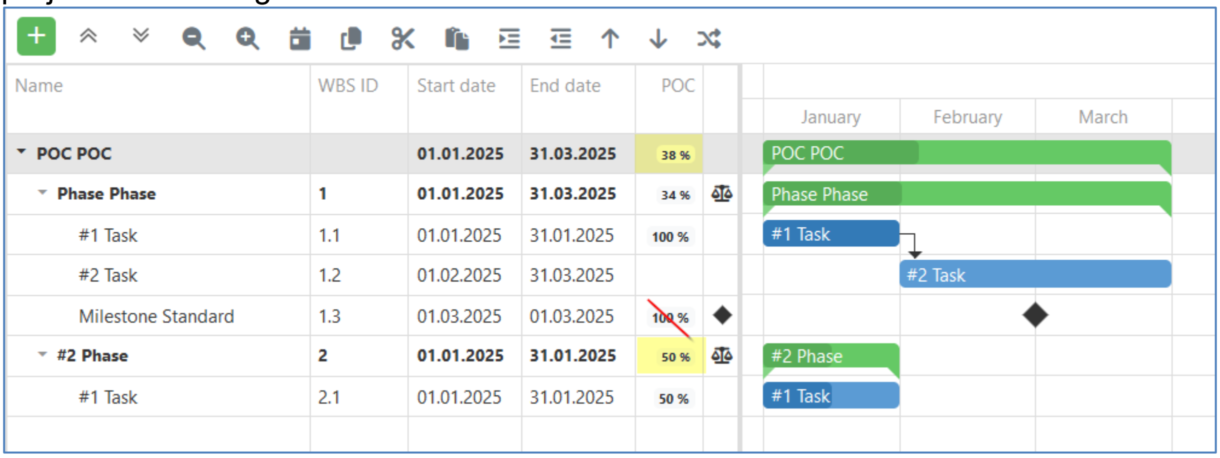
Dependencies between objects can be selected, while illogical ones can't be selected and are greyed out:

We also show the percentage of completion (POC) for each task. If this is maintained manually, the subtotal on subproject level and total on project level will be calculated:



Name	WBS ID	Start date	End date	POC
POC POC		01.01.2025	31.03.2025	32 %
Phase Phase	1	01.01.2025	31.03.2025	34 %
#1 Task	1.1	01.01.2025	31.01.2025	100 %
#2 Task	1.2	01.02.2025	31.03.2025	
Milestone Standard	1.3	01.03.2025	01.03.2025	100 %
#2 Phase	2	01.01.2025	31.01.2025	25 %
#1 Task	2.1	01.01.2025	31.01.2025	50 %
#2 Task	2.2	01.01.2025	31.01.2025	

The calculation of the POC also includes time, therefore we stick to simple months in our example. If we take away the second task in phase two, the POC of the phase and project POC changes:



Name	WBS ID	Start date	End date	POC
POC POC		01.01.2025	31.03.2025	38 %
Phase Phase	1	01.01.2025	31.03.2025	34 %
#1 Task	1.1	01.01.2025	31.01.2025	100 %
#2 Task	1.2	01.02.2025	31.03.2025	
Milestone Standard	1.3	01.03.2025	01.03.2025	100 %
#2 Phase	2	01.01.2025	31.01.2025	50 %
#1 Task	2.1	01.01.2025	31.01.2025	50 %

The following icons are available on the right side:

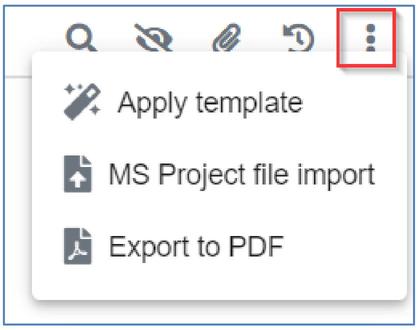
Under the magnifying glass is the search function.

The crossed-out eye indicates the closed project structure elements.

The paper clip is used to upload documents.

The clock shows the version number and already existing files are shown as versioned.

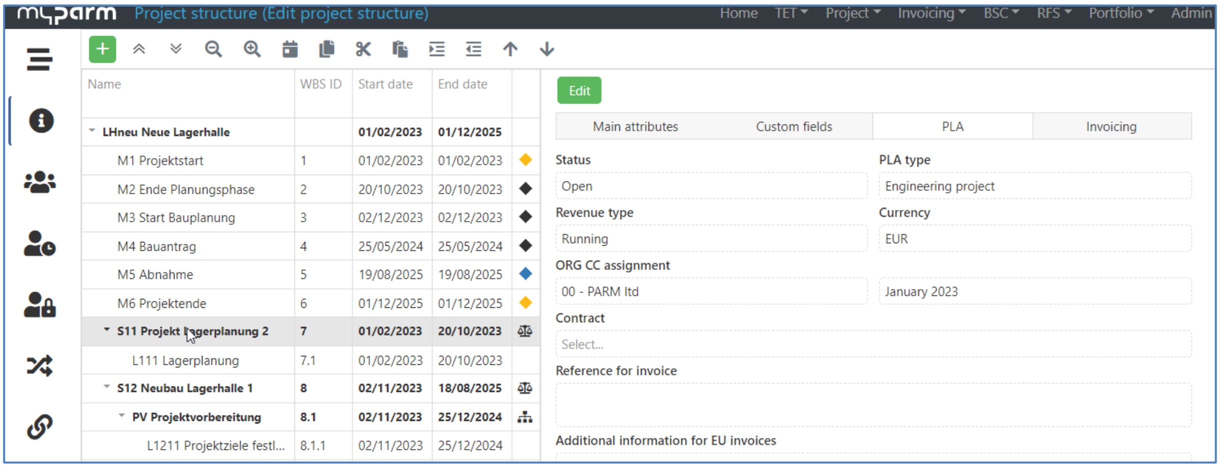
The following options are available under the three points:



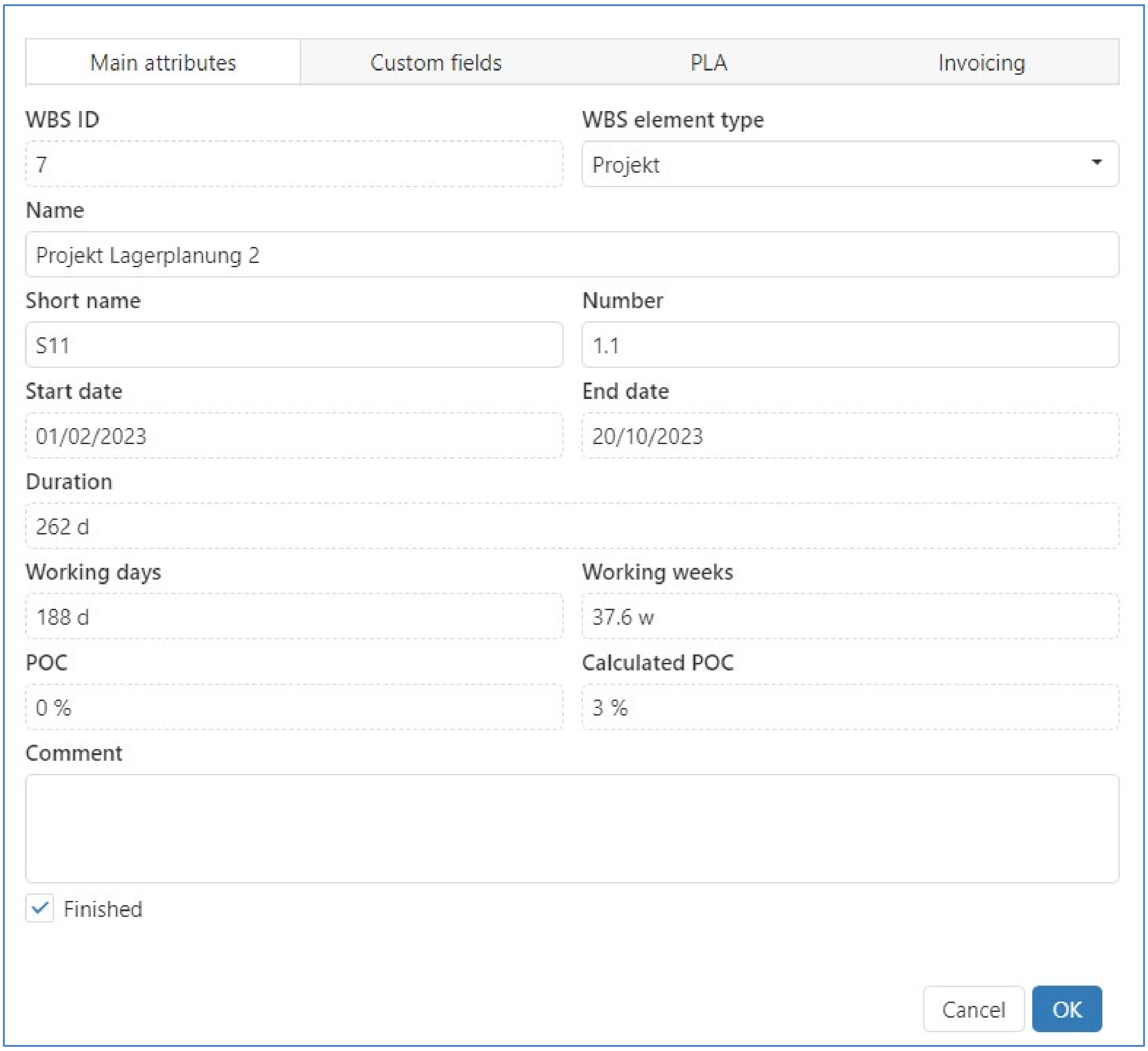
1) Save the entire project or selected project structure elements as a template.
2) Import MS Project file under the currently selected project structure item.
3) Export the project structure as a PDF.

2.2 Information

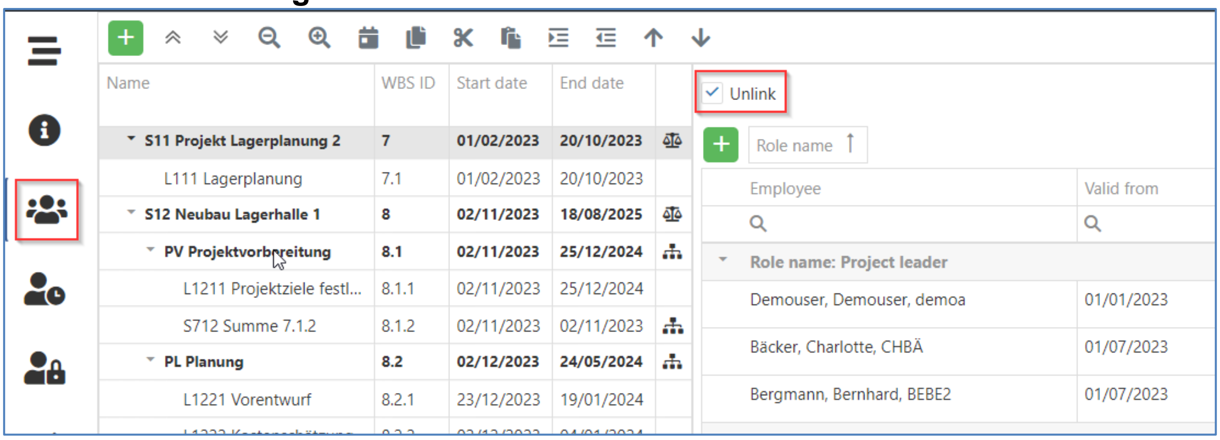
All necessary information about the selected project structure element such as project, sub-project, phase, work package or activity is displayed here and can be edited by pressing the green "Edit" button. The symbol “libra” marks the PLA.



A pop-up with the tabs opens for editing. Tab by tab can now be edited. At the end, the changes are confirmed with OK.



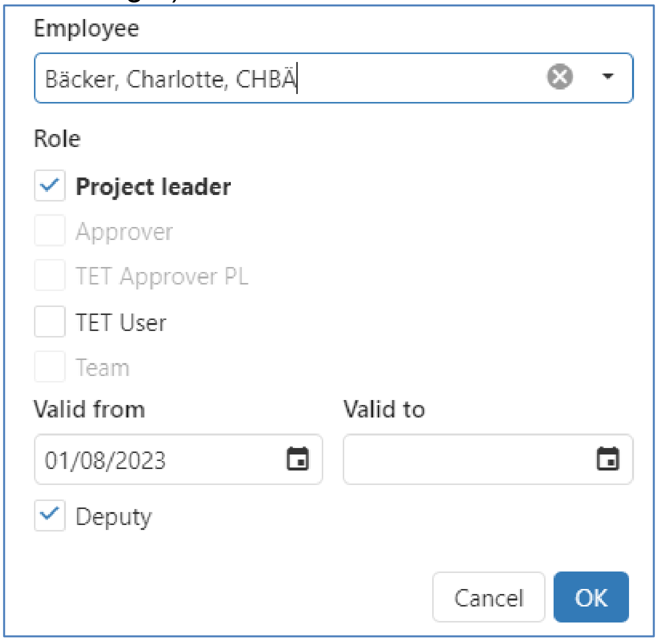
2.3 Team management



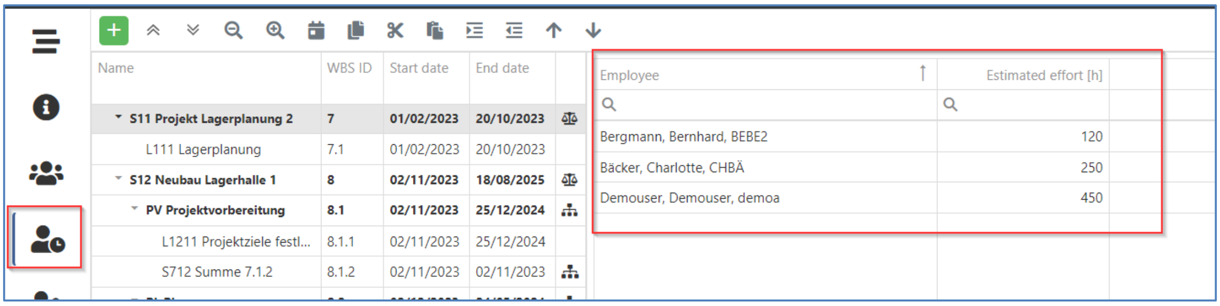
The team members who were entered at the higher level (the project in this example) are displayed. If a changed team applies to this element, this can be done with "Unlink".

Additional team members can now be entered by clicking the green plus. Especially with a larger project structure, it makes sense to consider whether the additional team member should be added at the project level so that it is then directly inherited (to all sub-elements).

An employee is searched for by entering their name in the field, or the corresponding employee is searched for in the list.
You give him the appropriate roles, define whether he should be entered as a deputy and adjust the "Valid from" date accordingly. Then confirm with OK (blue button at the bottom right).

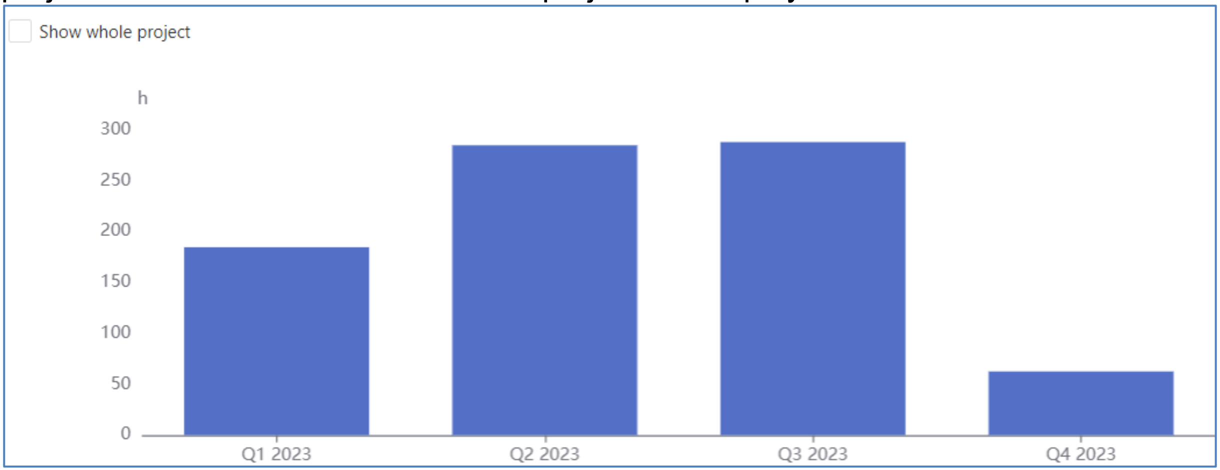


2.4 Estimated effort

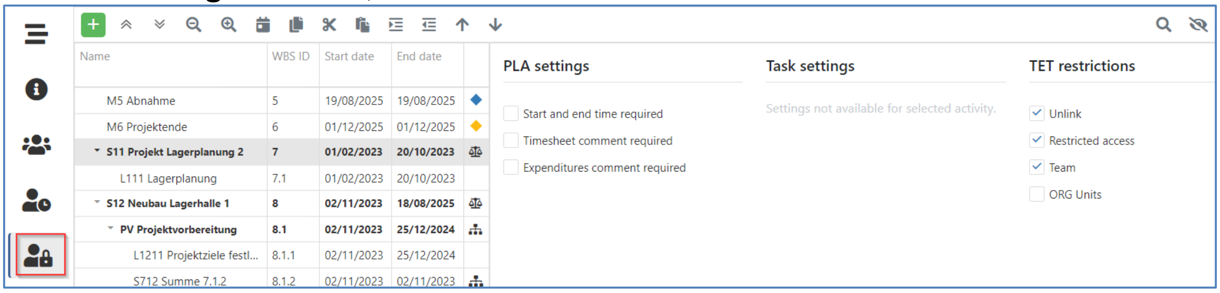


On the right side the team members are listed and an effort estimate in hours can be added for each member.

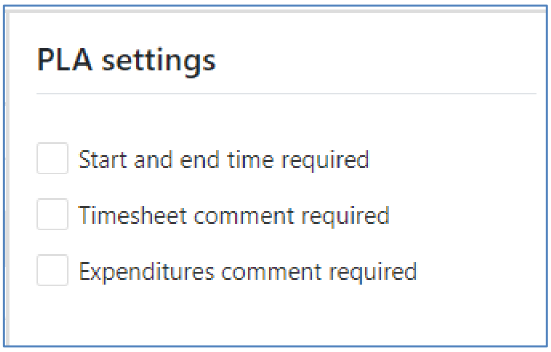
After saving, the resource graphic is adjusted in which the aggregated hours of the project structure element or the entire project are displayed.



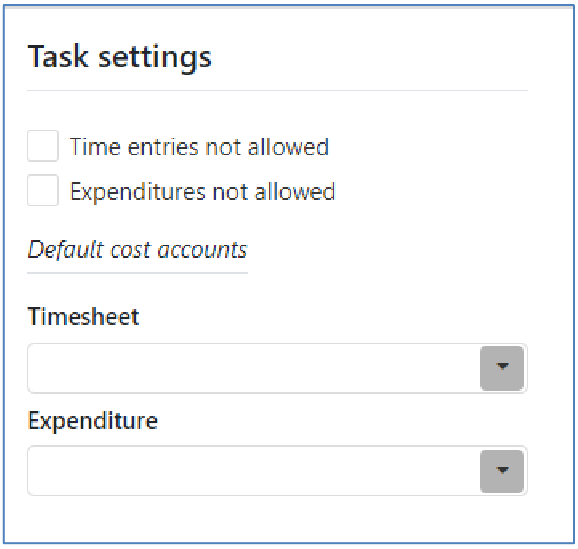
2.5 Settings for PLA, Task and TET



If you mark a PLA / accounting level / phase in the structure, it is defined there whether start and end times are required, whether a comment is required for time recording and expense entries.



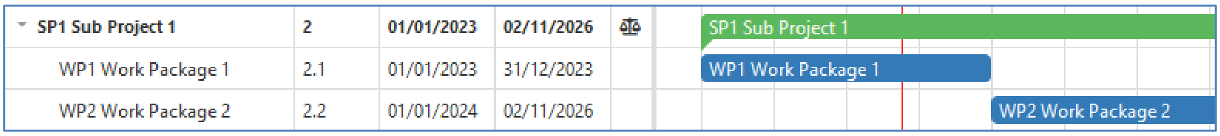
At task level it is defined whether hours and expense entries are allowed. Also, the different cost accounts are predefined here.



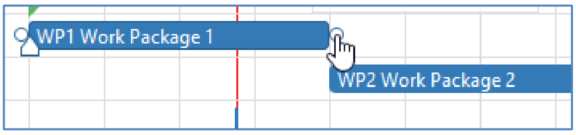
The TET restrictions can be used to define which restrictions should apply. Only defined users or users of defined ORG units may add hours and expenses on the task.

2.6 Dependencies

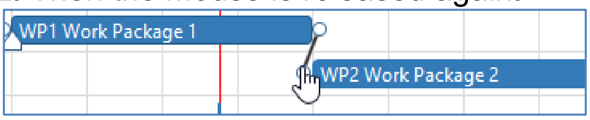
A dependency is created here between WP 1 work package 1 and WP 2 work package 2.



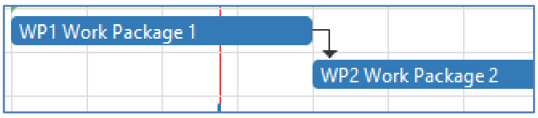
To do this, go to work package 1 in the Gantt until a circle and a hand become visible on the right:



Then hold down the left mouse button and drag it to AP 2 until a circle becomes visible on the left side of AP 2. Then the mouse is released again.

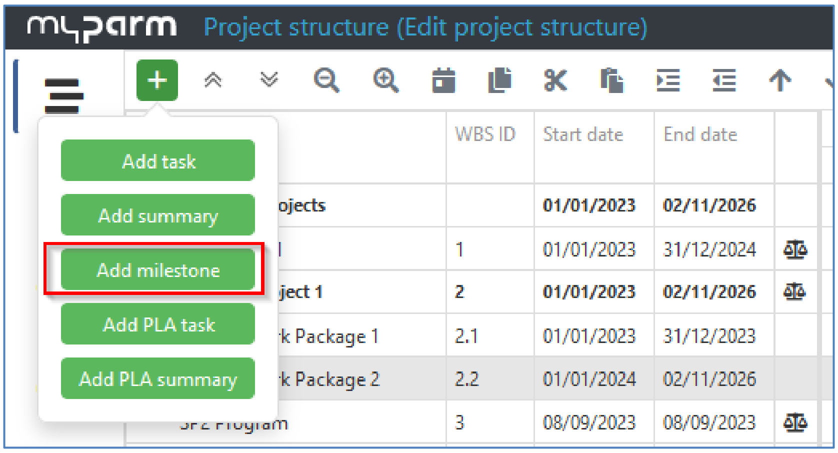


Now there is a dependency between AP1 and AP2:

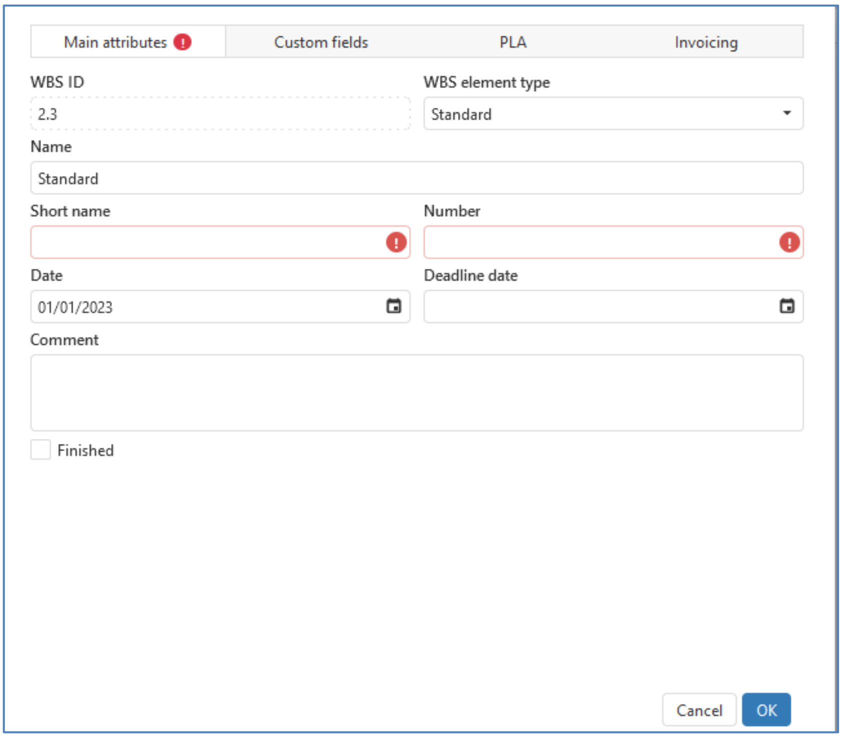


Add milestone

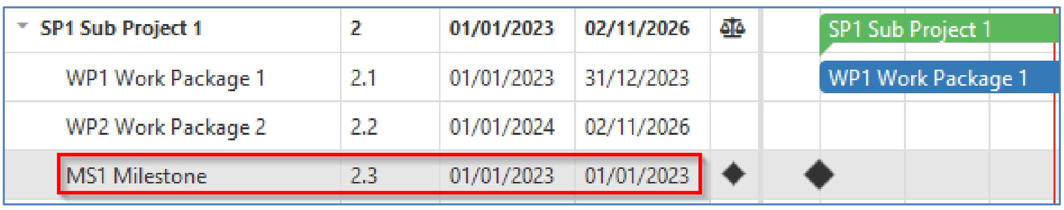
The element “TP1 subproject 1” is selected and then the green plus is pressed and “Add milestone” is selected.



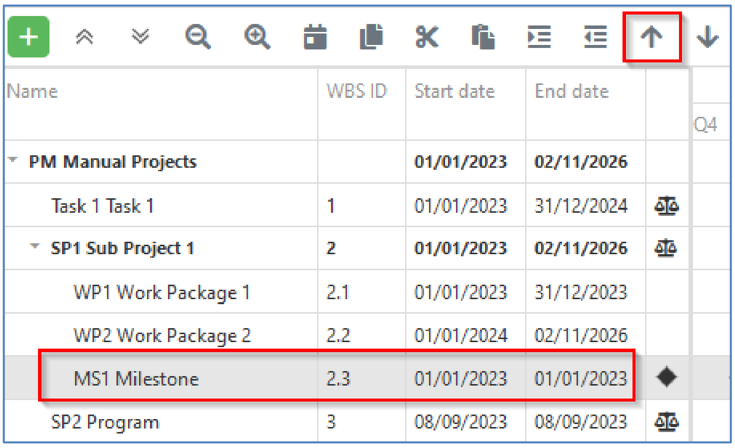
In the wizard, the red fields are filled in and confirmed with OK.



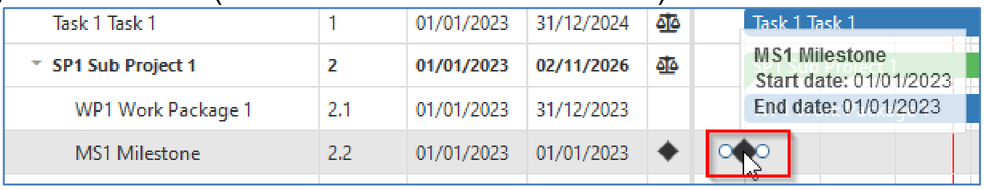
The milestone is now inserted at the bottom of TP1.



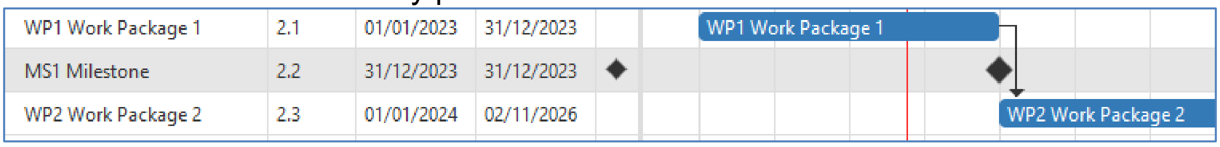
Now the milestone is to be moved between AP1 and AP 2.
The milestone is selected and then its position is changed using the “Move up” arrow at the top.



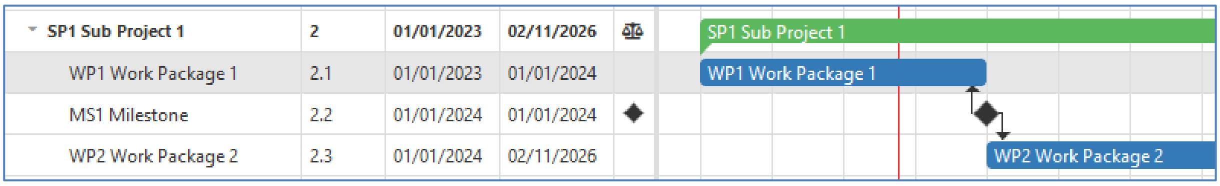
The milestone is marked in the Gantt until a double line and arrows are visible on the left and right and then moved to the desired date. The date can also be entered when entering the milestone (see “Date” in the wizard above).



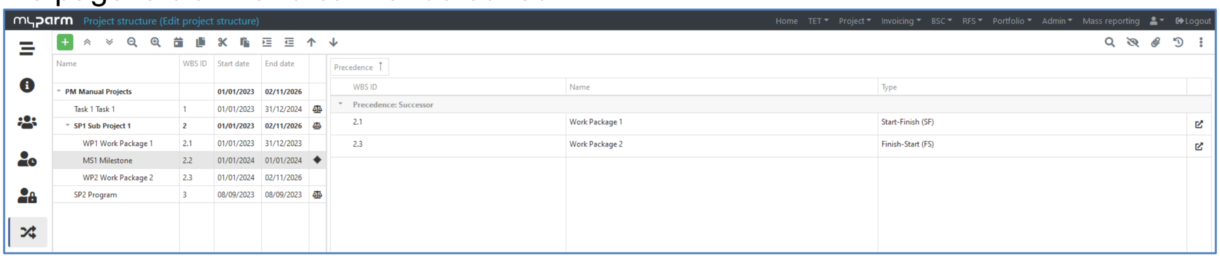
Now the milestone is correctly positioned.



Move the mouse over the milestone until a circle and a hand become visible to the left and right of it. Then drag the circle on the left to the circle of AP 1 and the first dependency is created. The same thing is now drawn with the circle on the right on AP 2 on the left.



The various dependencies are visible in the Gantt view and are also displayed accordingly in the “Dependencies” view. If there are no dependencies in the project, the page is blank and cannot be edited.



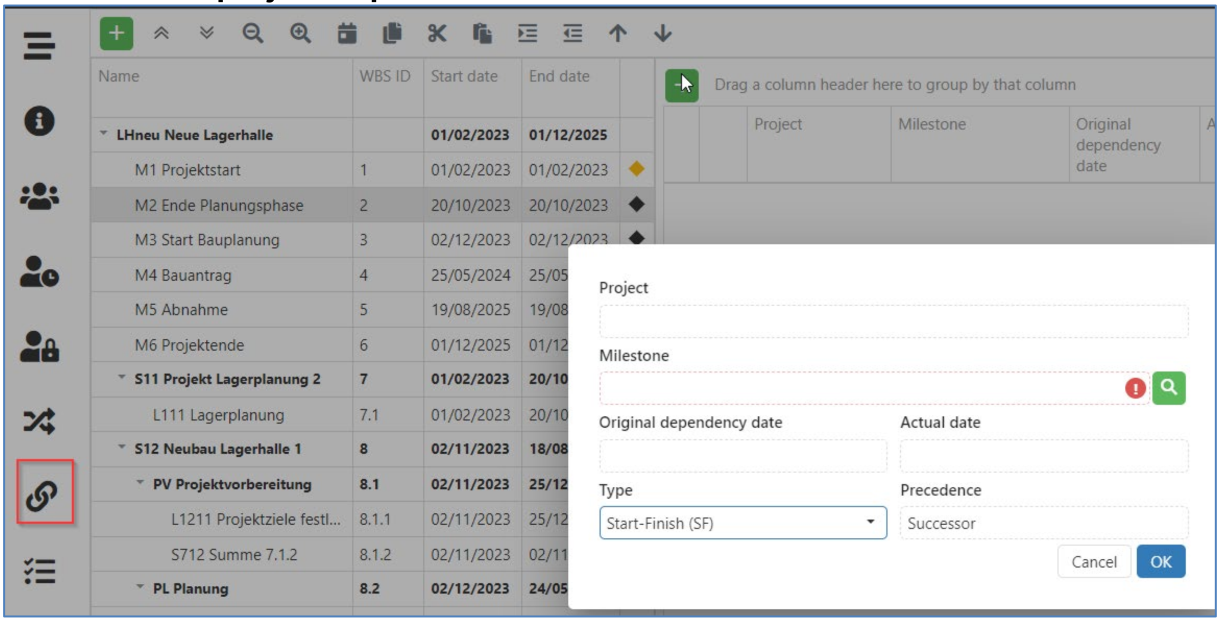
It is also possible to create dependencies via an input mask in addition to the existing drag & drop function within the Gantt.

This function can be used if the creation is “blocked” within the Gantt, or for dependencies that are not visible in the current screen window.
You can select this option within editing the project structure:

Select the level where the dependency should be created and use the button in the menu. The pop window shows up and shows the structure of the project. Grey parts of the structure can’t be selected as this prevents creating unlogic dependencies, e.g. circular reference.

Note:
If a dependency is inserted with this function, the date of the successor is not currently adjusted.
However, you can move the successor manually in the Gantt. The successor is then automatically moved each time a predecessor is moved.

2.7 Cross-project dependencies



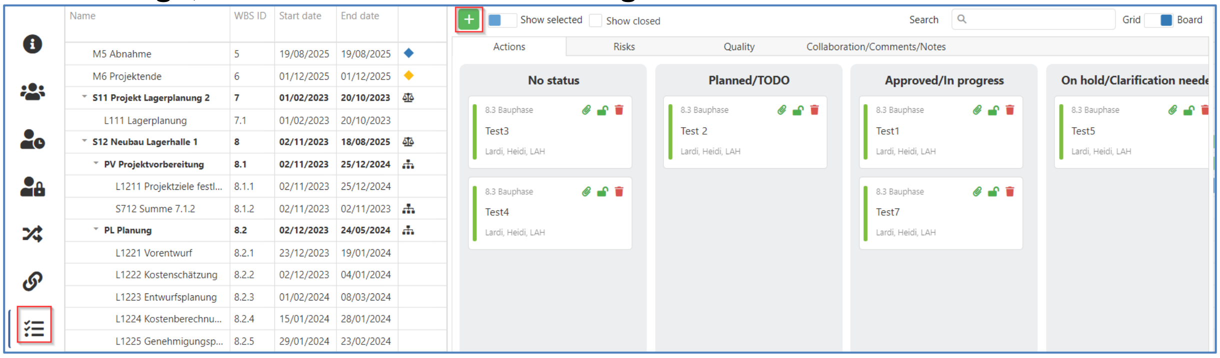
A milestone of the " **Gate** " type is selected and then the green plus is pressed on the right (marked red in the image). The pop-up opens and you enter the associated project, select the dependent milestone and the desired dependency type. The entries are saved with OK.

2.8 Milestones

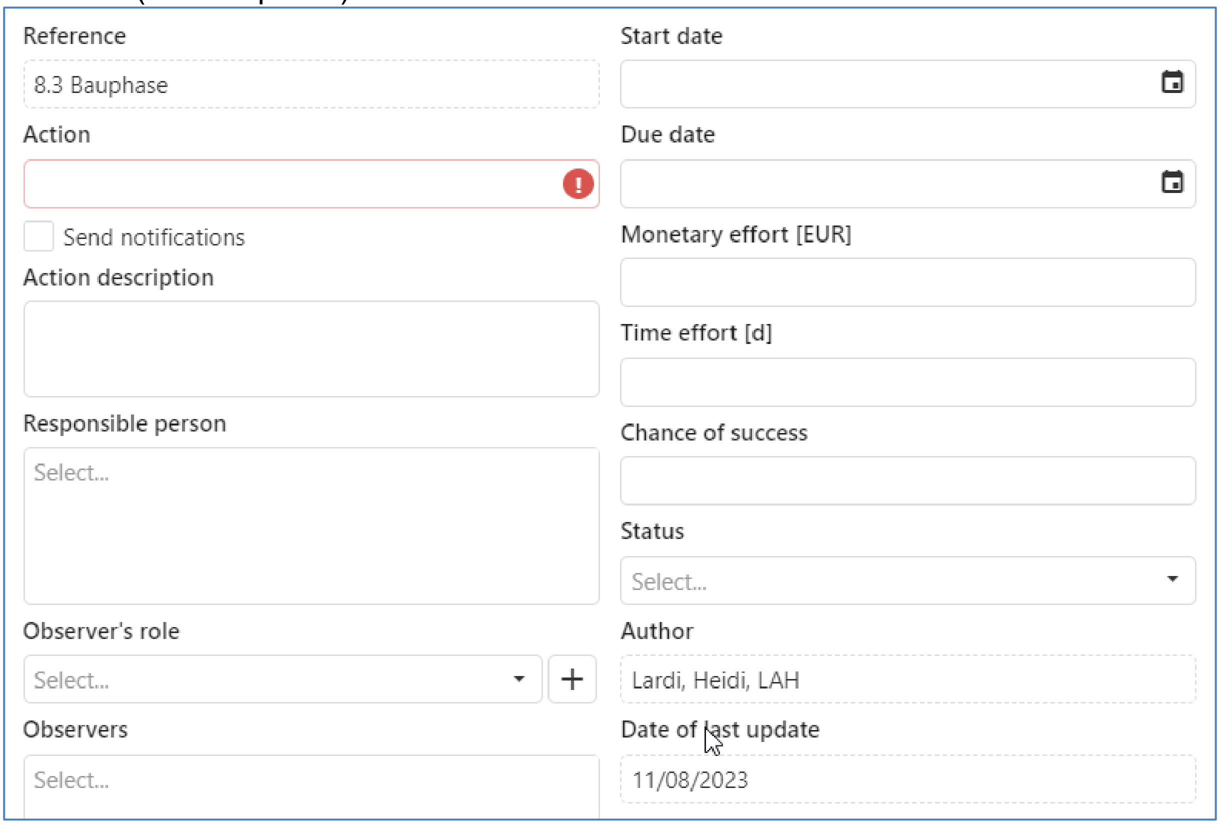
Milestones represent milestones and key moments in the project and can be created in myPARM in the following forms:

- **Standard milestones:** normal milestones without any special additional function
- **Gate milestones:** this special type of milestone makes it possible to create a dependency to another project. If such a dependency exists and there are postponements, the project management of the affected projects receives a notification when their project is next rescheduled.
- **Master milestones:** this was a customer request that we have now generally adopted in the standard system. These are special milestones of a project that may also be shown separately in the project status report. Customers use these milestones in their project templates and have defined them in such a way that they cannot be deleted.

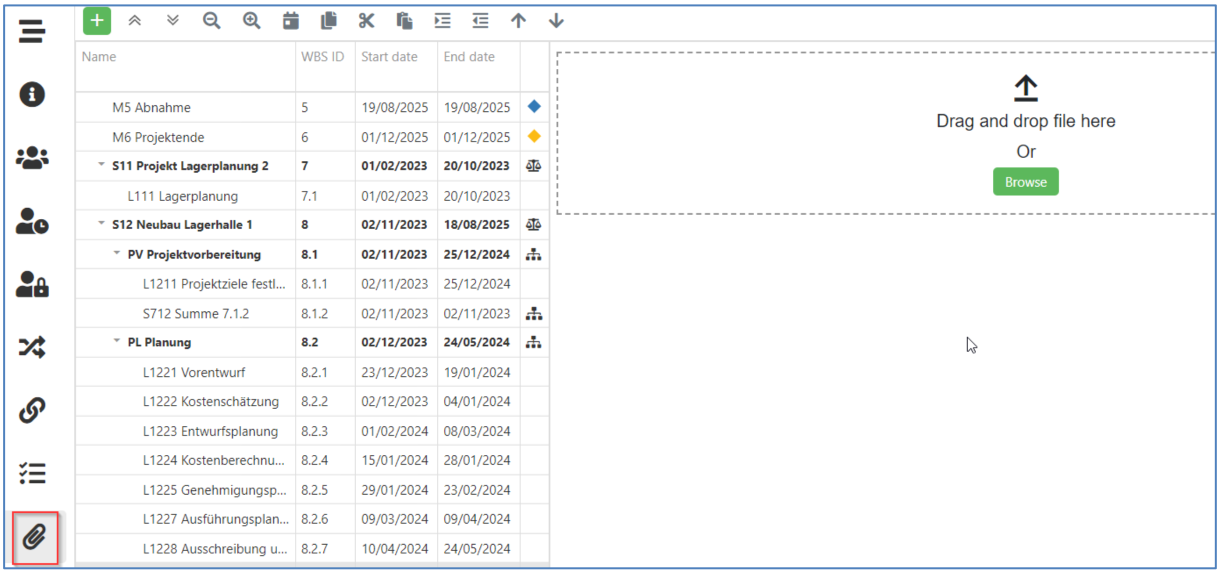
2.9 Logs, Kanban Board / Task Management



A task can be created for each project structure element here.
Pressing the green plus button (marked red in the image) opens a pop-up that can be filled in accordingly.
The visualisation can be displayed as a list or Kanban board using the blue button in the right-hand field and can be used in other areas of myPARM in addition to the project structure (see chapter 7).

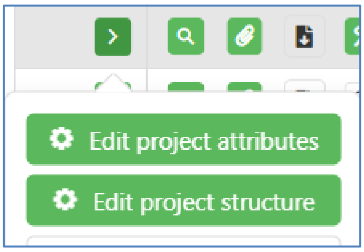


2.10 Documents



Documents can be uploaded to any project structure element. Either the file (document) is dragged into the marked field or searched for in Explorer.

The project and its structure are now created. If the project structure or the project attributes are to be changed, this is done as follows:
The green arrow is pressed at the project level and two processes are displayed. These only appear in green when a project has been completely created.

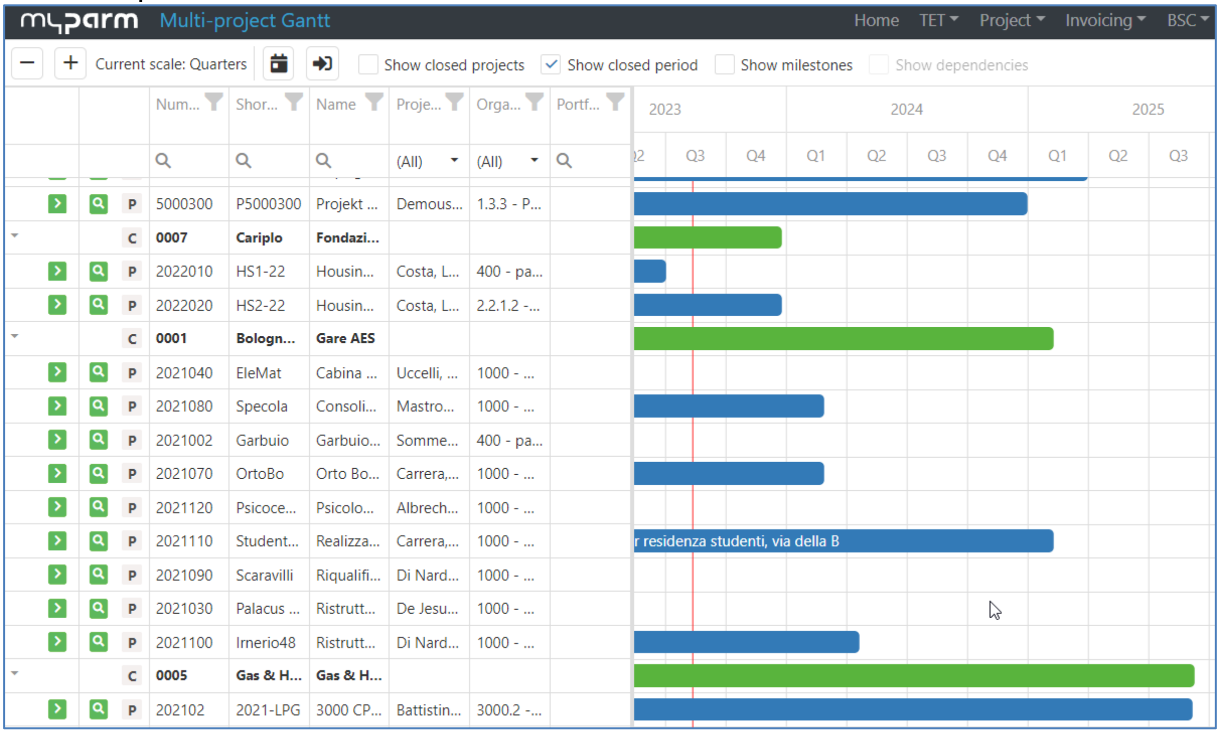


The process that is required is now selected. If something is to be changed in the information of the project, "Edit project attributes" is selected. If changes are to be made to the project structure, "Edit project structure" is selected.

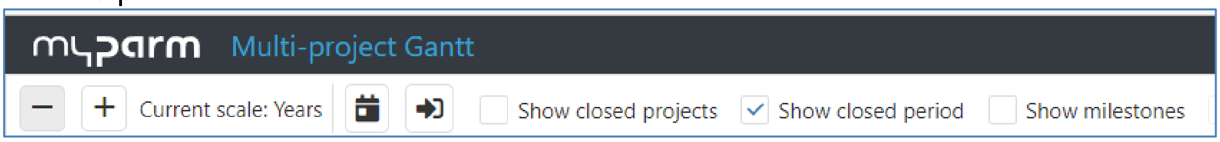
These two processes are available to you for all projects.

3. Multi-Project Gantt

All projects that the user is allowed to see are displayed in the multi-project Gantt. Milestones and dependencies between the projects are also shown. The following filters can be set: "Show closed projects", "Show closed periods", "Show milestones", "Show dependencies".



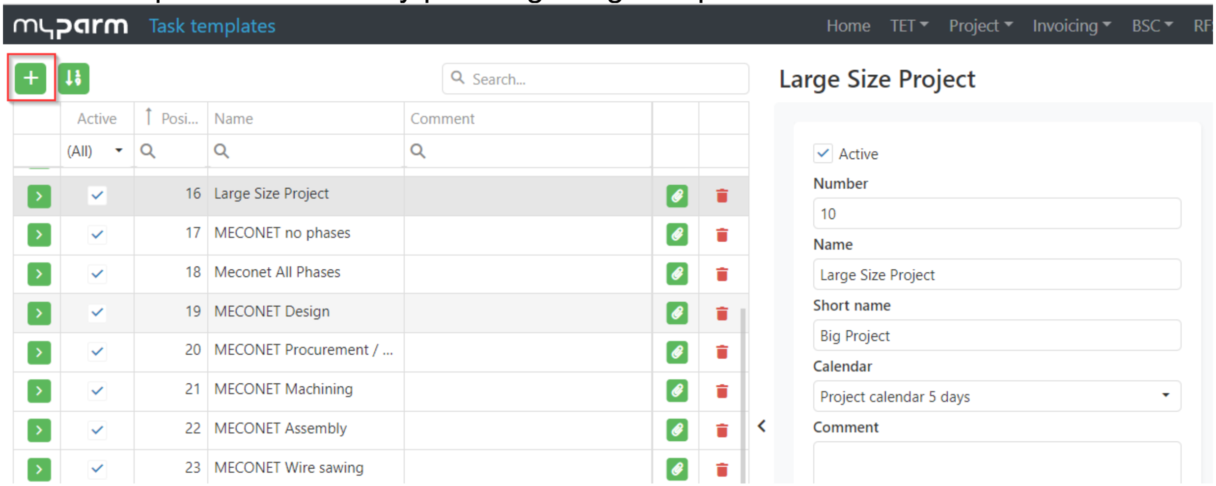
The current scaling is set to year by default. The scaling can be changed with the minus and the plus.



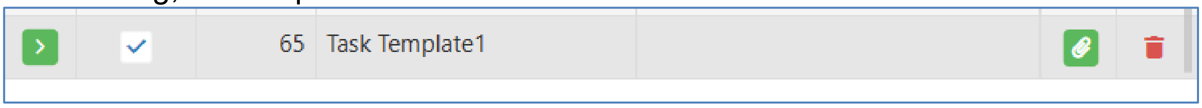
Filtering for current scale, closed projects, closed periods and milestones is possible.

4. Task templates

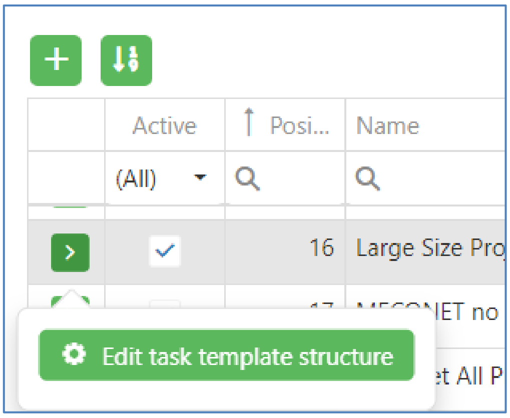
You can create your own project templates. A list of different projects with a project structure is available in the Project Task Templates module.
A new template is created by pressing the green plus.



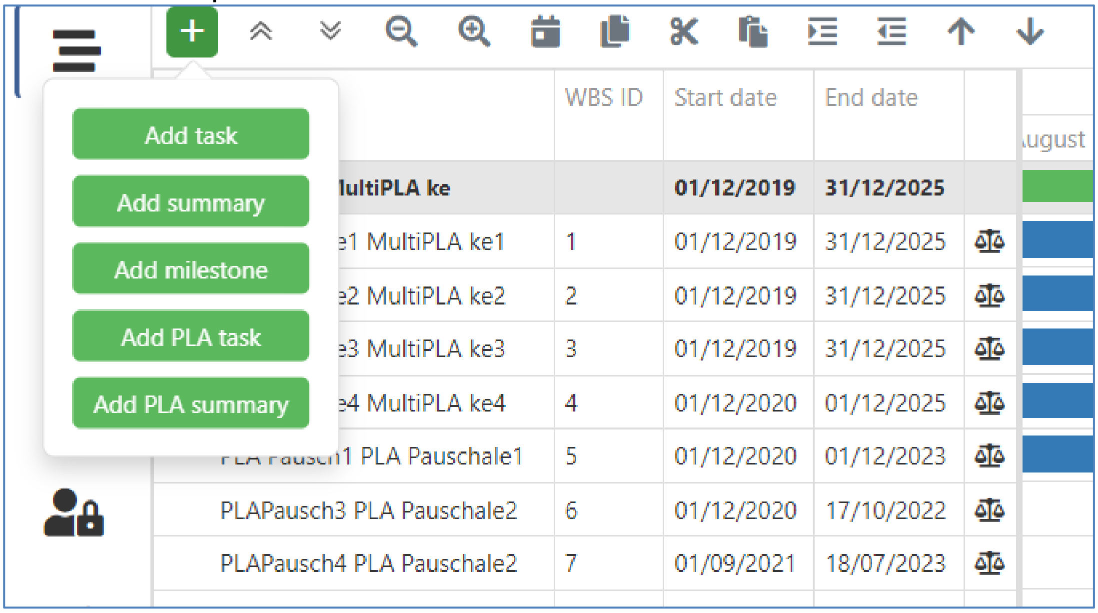
The template gets a number, a name, an abbreviation and the calendar are selected. After saving, the template can be seen in the left column.



Pressing the green arrow starts the process for creating/changing the project structure. Existing task templates can also be changed in this way.

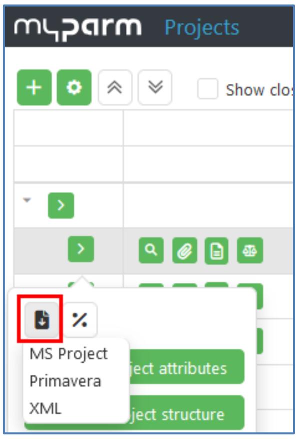


The project structure is now opened, and various elements can be added with the green plus. In this way, a project can be mapped with its structure, which can later serve as a template.

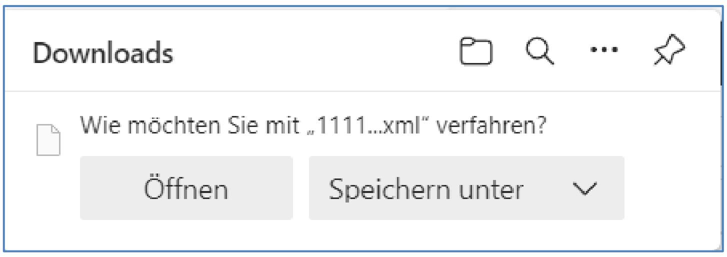


5. Copying an existing project via MS Project

It is possible to copy a project via MS Project (XML file) and add it as a new project. The process is available in the project portal. The black icon is pressed, and MS Project is selected.

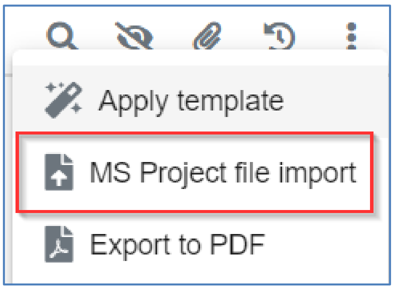


The following window then appears in the browser and the "Save as" (Speichern unter) command is selected. Do not select the «Open» (Öffnen) command because the content cannot be displayed.

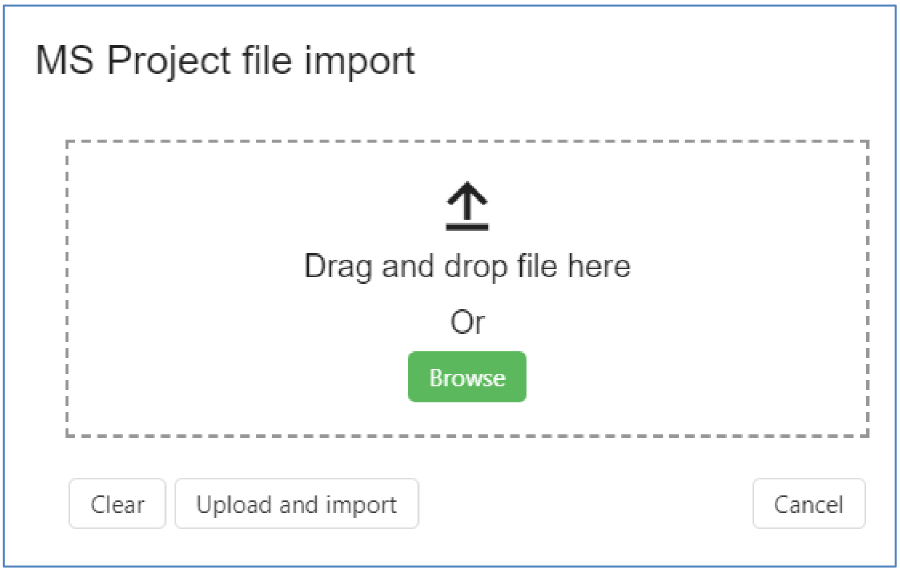


A new project is now created as described in point 1.
Once you have reached the project structure, select the project structure view.

Under the 3 dots on the right side, you have several commands:



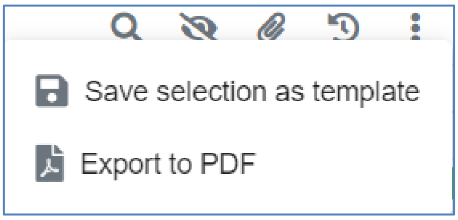
If you click the symbol for MS Project file import, a window opens:



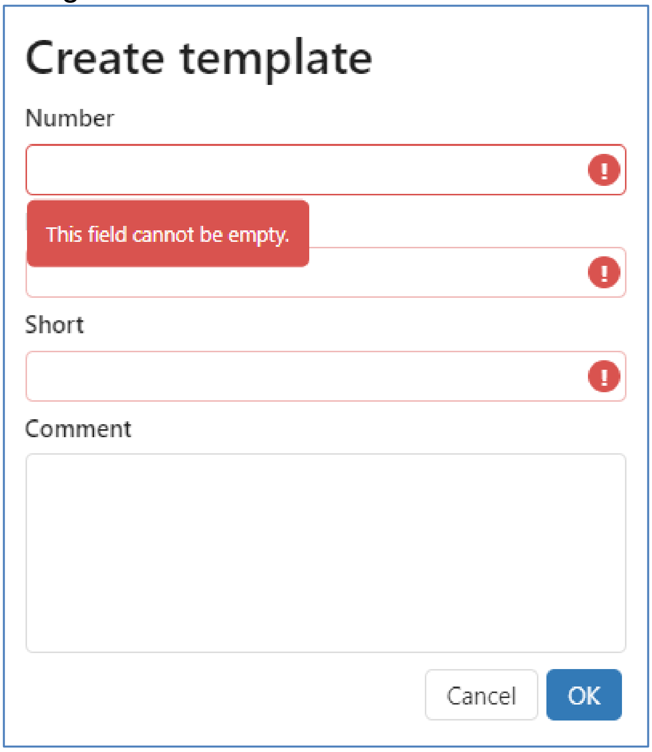
Now the copied project will be uploaded or searched for in the frame.
Then the «Upload and import» command is active and can be used.
It must be ensured that the start date in the new project and in the copied project match, otherwise the import will not work.

6. Copying a project with a template

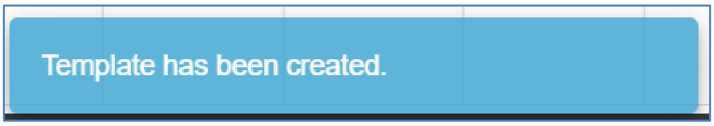
We recommend creating a template of the project to be copied and then importing this into the project structure.
The project that is to be saved as a template is opened in read mode (magnifying glass). The level (in our example the project) is selected from which the project structure is to be copied. Select under the 3 dots on the right side “Save selection as template.



A new window is opening:

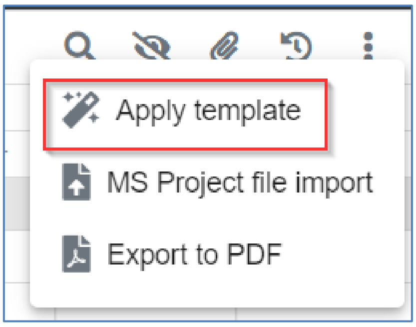


After confirming with OK, the template is created, and the system confirms this with the feedback:

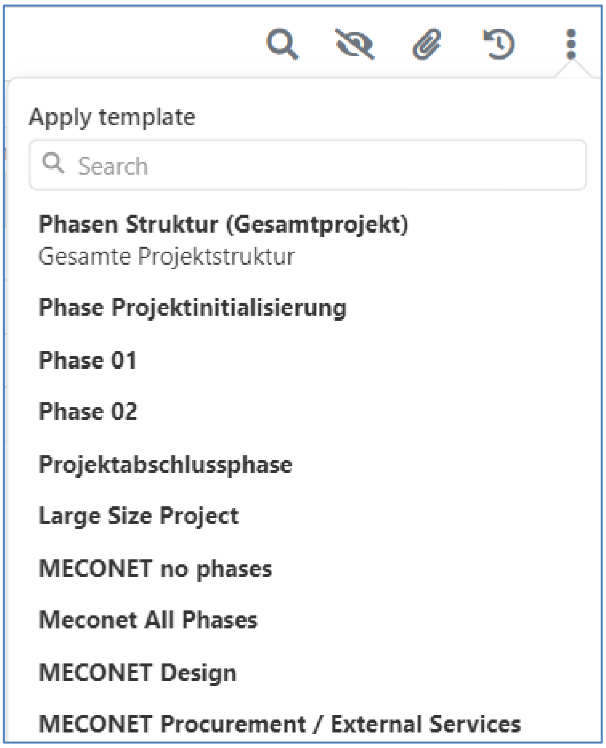


A new project is now created in the project portal and the project template can be selected in the project attributes. The project structure is automatically adopted in the next step. The elements can be adjusted, changed or new ones added.

If the template is not defined on the project level, this can be done in the project structure. The template is selected and then the symbol to the right is pressed so that the template is also used. Open now the edit project structure process. Under the 3 dots on the right side the command “Apply template” is available.



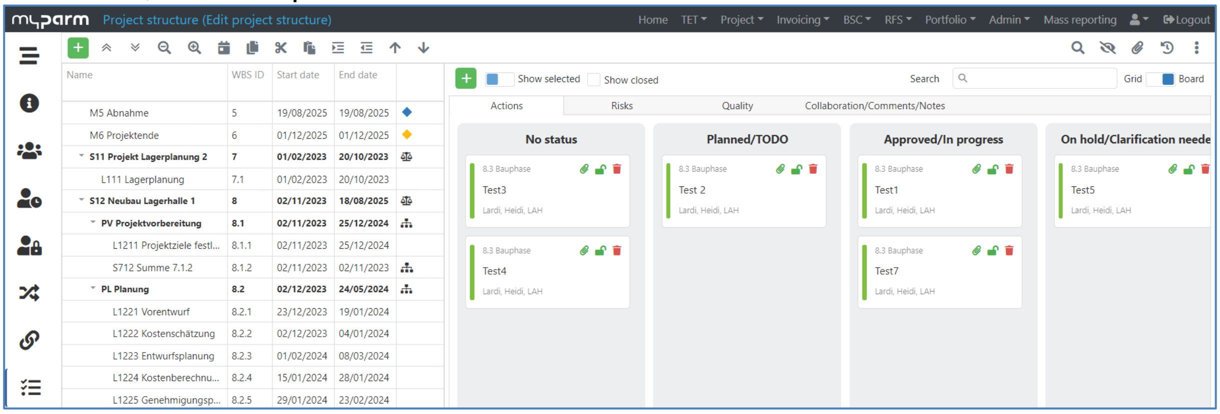
A list with all available templates is visible and the one who is needed can be selected.



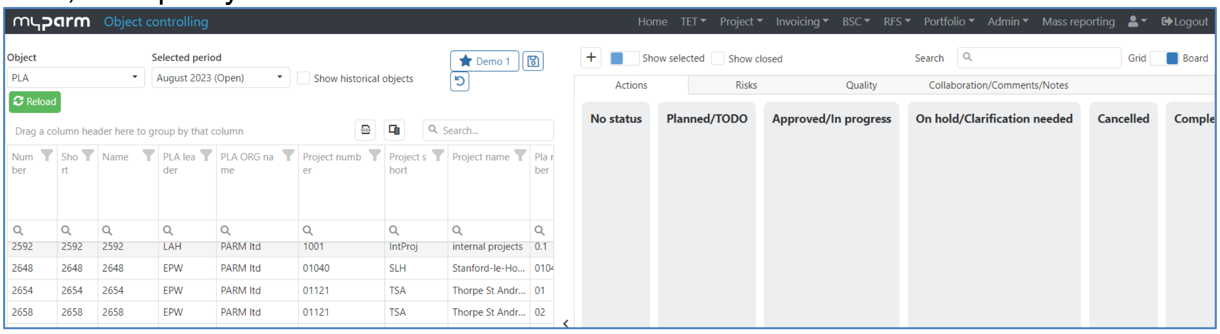
Templates can also be deleted anytime.
This is done in the project portal under "Task Templates".

7. Task management

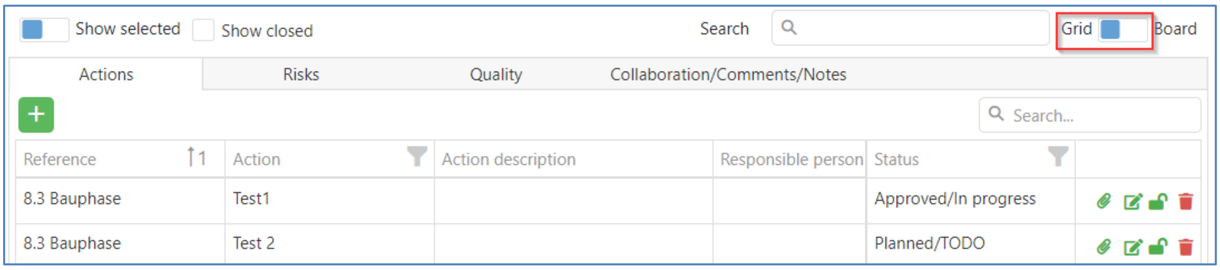
Task management provides a transparent overview of project progress and contributes to structuring and organizing the creative process. Task management offers a clear view of the project's advancement. The Kanban board consists of 6 columns: No status, Planned/To-Do, Approved/In Progress, On hold/Clarifications needed, Cancelled, and Completed.



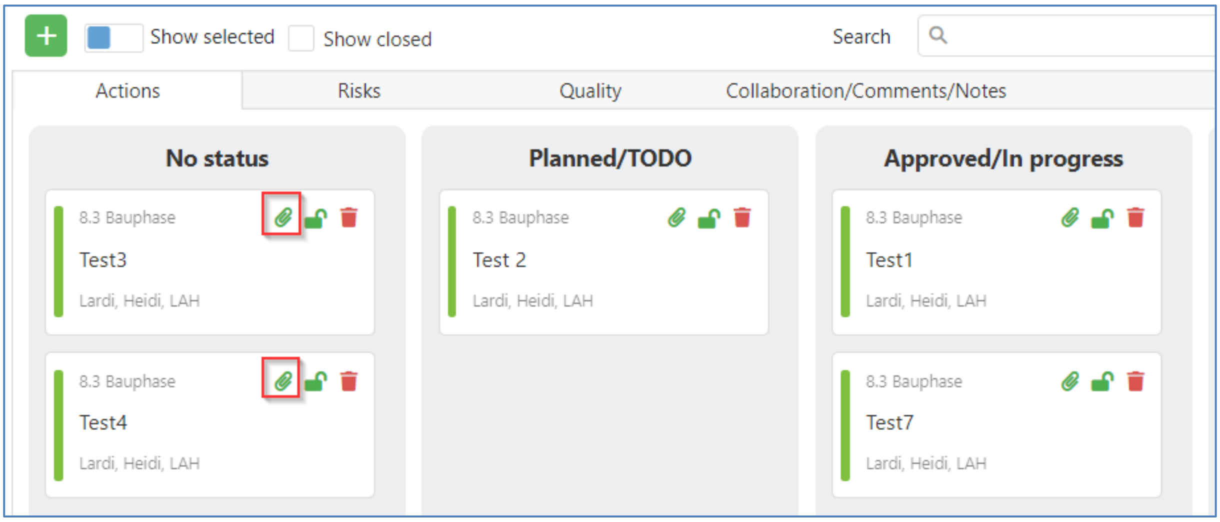
In the Workspace module, MIS, Dashboard, and in the Project Structure/Gantt, tasks, risks, and quality criteria can be defined.



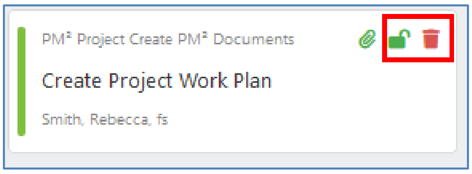
The tasks can also be displayed as a list:



Documents can be uploaded (paper clip) to each tab (Tasks, Risk, Quality, Collaboration/Comments/Notes).

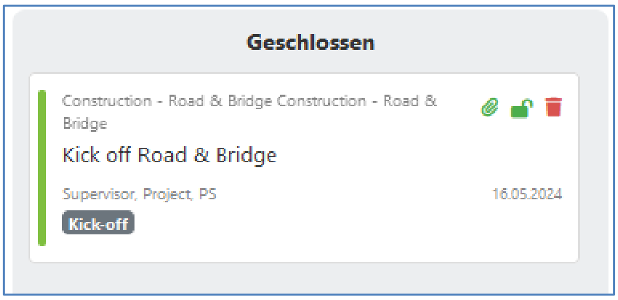


Next to the document attachment, you will find the icons for the two functions: "Lock" (Close) and "Trash Bin" (Delete).

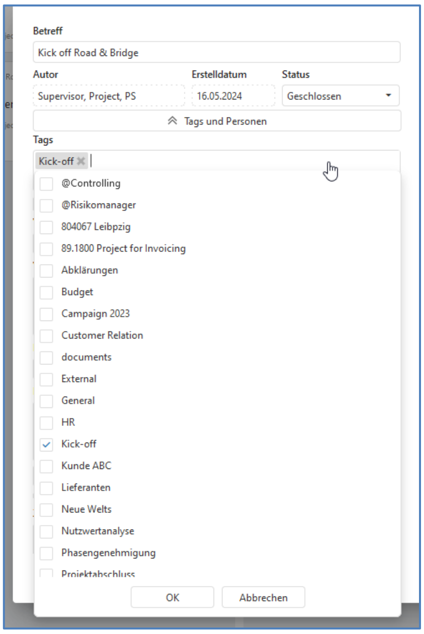


1. **"Lock" – Closing Tasks:**
   This function is part of the task process monitoring and can only be executed by the author or responsible person.
   - Closing a task means that it will not be further processed. Therefore, it is marked as "closed" and remains in the logs so that it can be "opened" again at any time. Typically, a task is "closed" in the following sequence:
     1. The "responsible person" sets the status to "Completed".
     2. The author checks if the completion has indeed occurred and can approve it.
     3. If so, the author marks the task as closed, which means it is truly completed. (It will only appear on the Kanban board if the "Show All Statuses" flag is set.)
   - When a task is closed in the "Completed" column, it remains as a closed task in this column.
   - When closing a task in one of the columns "No Status," "Planned/To-do," "Approved/In Progress," "Deferred/Clarifications Needed," or "Cancelled," it is moved to the "Cancelled" column. This is because the task was closed without the "Completed" status, and thus, it was aborted without completion.
   - "Closed" tasks are no longer displayed in the standard view. However, they can be made visible again at any time by setting the "Show All Statuses" flag. "Closed" tasks can be reopened by the author or responsible person and then moved to the desired column on the Kanban board.
2. **"Bin" – Deleting Tasks:**
   This function is used to delete tasks if they are no longer needed. For example, if they were added from a template but are not required in the specific case. By selecting "Delete," a task is permanently removed and cannot be restored. Only the author of a task can "delete" it.

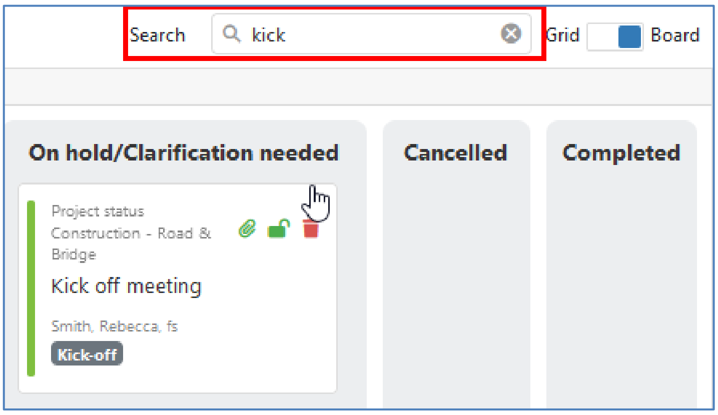
To highlight various tasks, tags can be used:



Tags are keywords. Documents or elements can be tagged with key terms from the document. After these terms are applied, they can be used for searching by all users in myPARM.

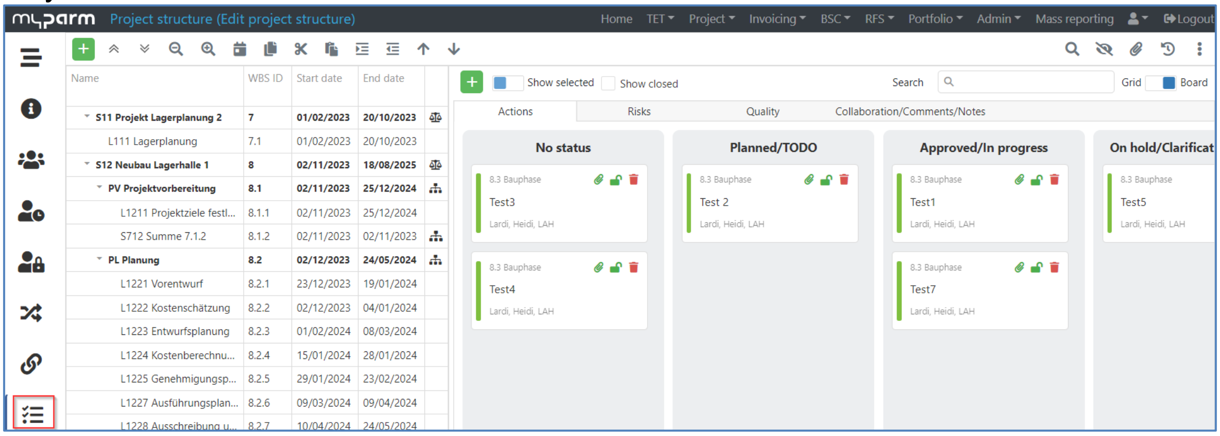


If a new tag is to be added, the text is entered into the field and confirmed with the Enter key. The new text is then available in every tag field and is stored in the database. Subsequently, tasks with tags can be searched more efficiently, especially if you work extensively with tasks:

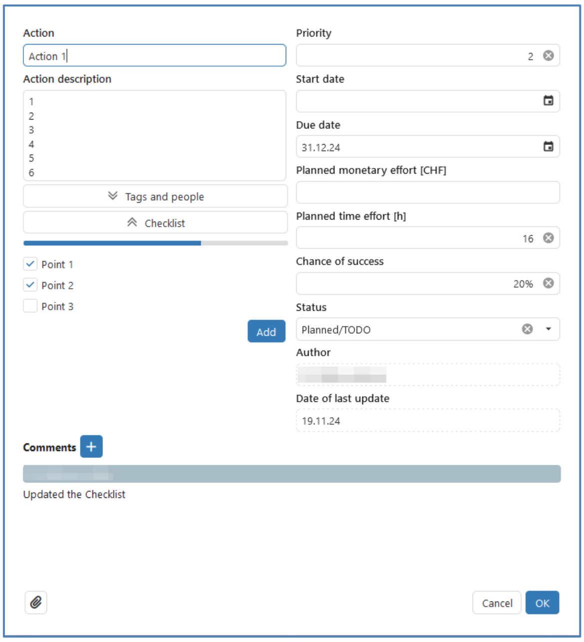


7.1 Tasks

In the project structure, task management is located under the "Log" icon. These can be edited both under "Edit Project Structure" and via the magnifying glass in read-only mode.



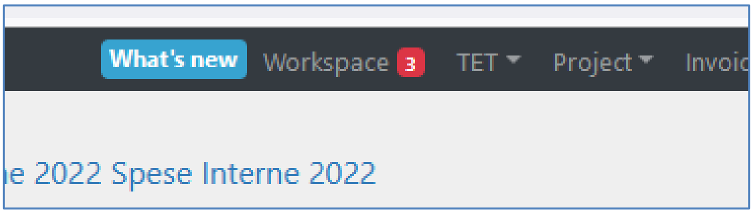
The input form opens either by double-clicking into a field or by using the + :



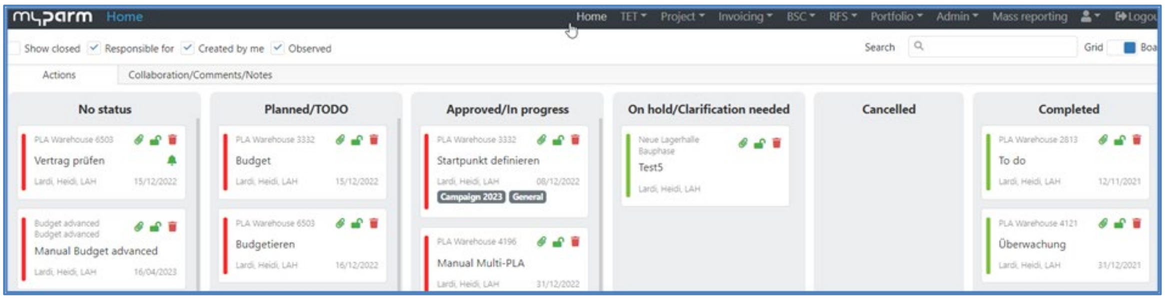
On the left side, the task is described, and the responsible person and observers are added. If desired, the involved individuals are notified via email ("Send notifications"), provided the business email addresses of the employees are stored in HR.
Under the checklist, individual points can be defined to ensure the task's completion. Checking off the individual points will also directly display a progress bar.

On the right side, you can already enter the costs in monetary value and the personnel effort. If a due date is specified, the task will be displayed in the Home view.
The field priorities can be filled in with values from 0 until 9999, making sure our clients can use whatever they need. Priorities can be set by the author of the task, while others will see it as read-only. The field is optional and can be cleared.

If you are assigned a role as a responsible person and author, this is also visible in the workspace. The red number next to "Workspace" indicates that two new or updated tasks are pending (see image at the top right):



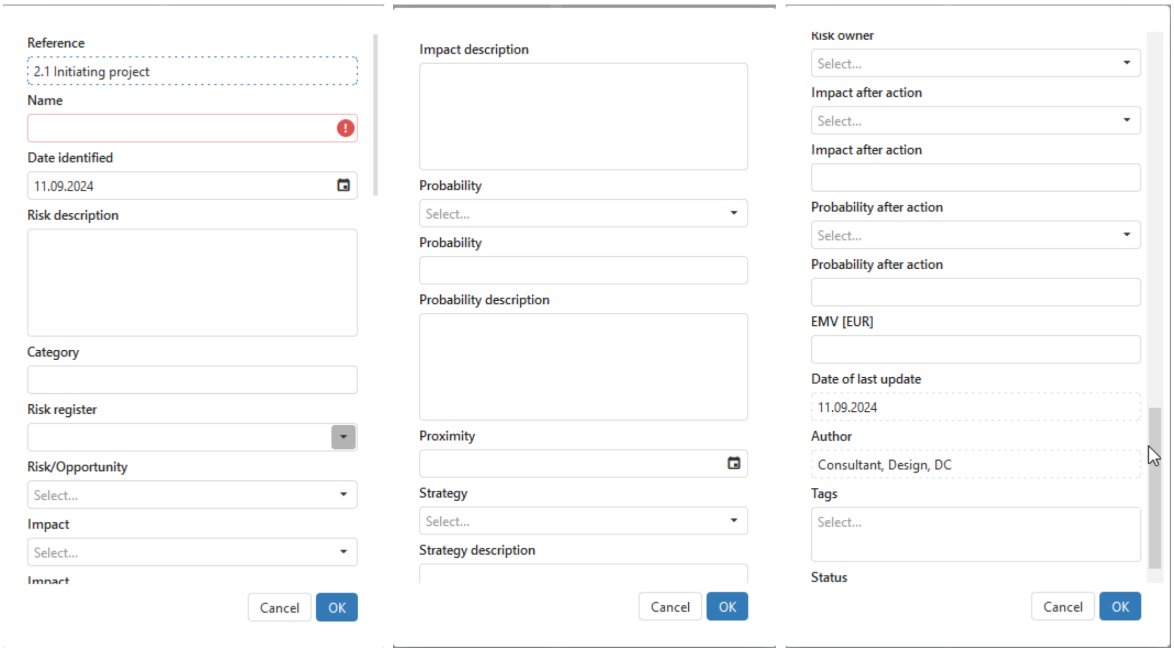
It is possible to view all tasks in which the user is involved. This includes information about where the user is responsible for tasks, which tasks have been created by the user, and in which tasks the user is listed as an observer.



When a task is ready for the next step, it can be dragged to the next column with the mouse or changed to the next status using the dropdown menu within the task itself.

7.2 Risk

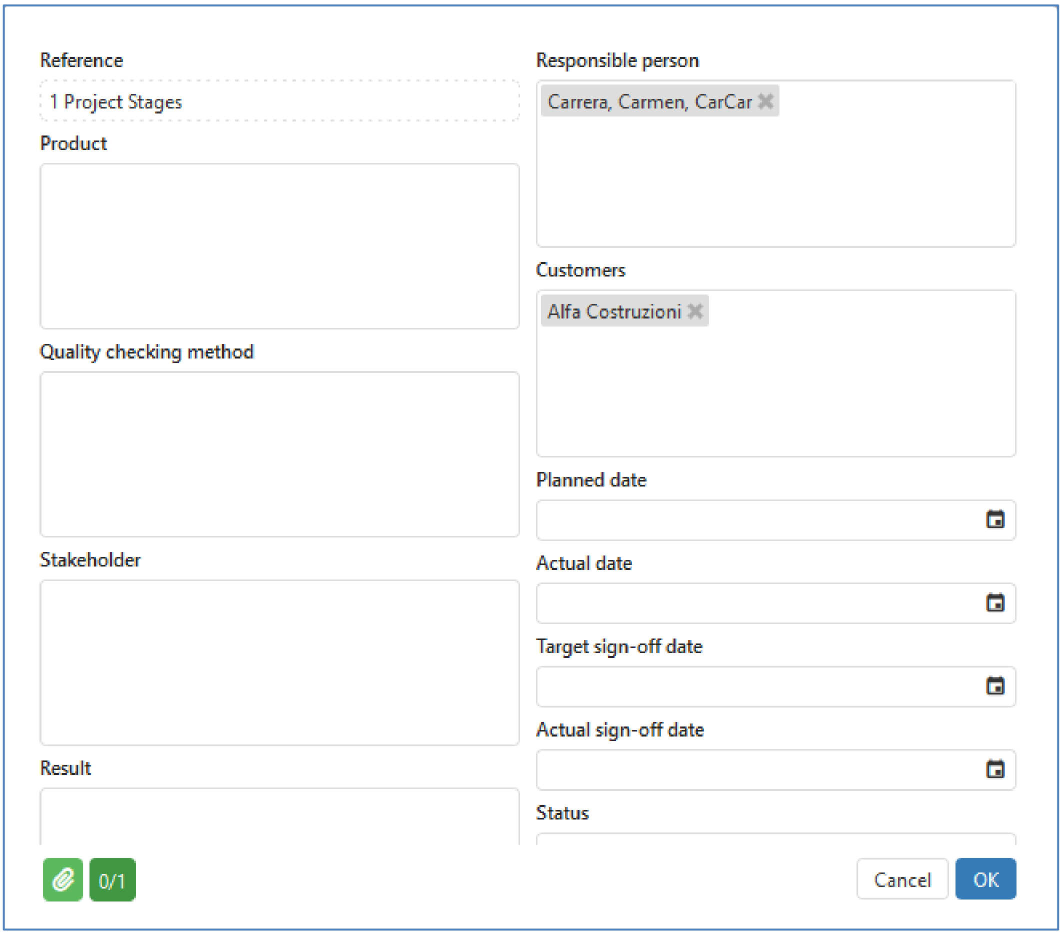
If there is a risk associated with the assigned task, it should be recorded in the 'Risk' column. Description of the risk, selection of the risk from the risk register, impact, probability of occurrence, description of the strategy, measures to be taken, etc.



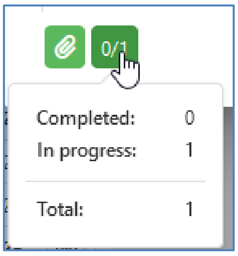
For more information on risk management, see chapter 12.

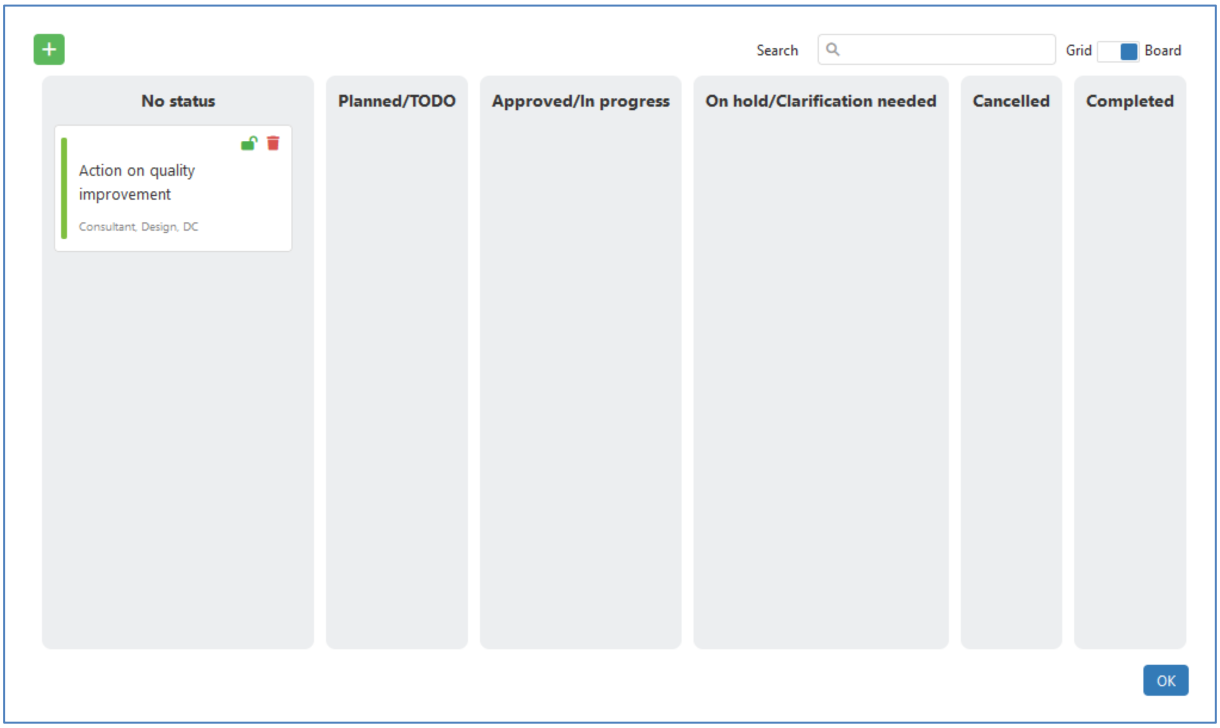
7.3 Quality

Details regarding quality can also be recorded. The method and result of the quality inspection are described, along with the responsible person, the customer, the planned and actual date, and the release date.



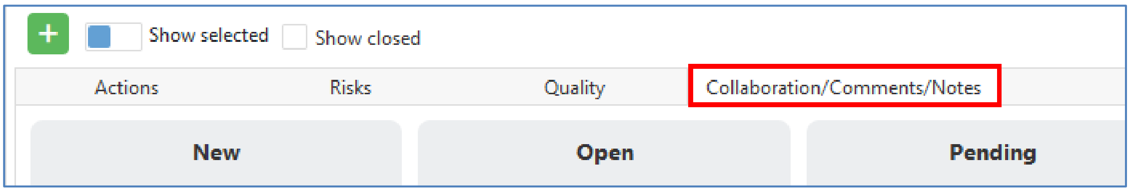
If multiple tasks are necessary to achieve the required quality, they can be recorded directly under quality. In addition to the document display, the associated tasks are shown. By selecting them, another Kanban board opens:



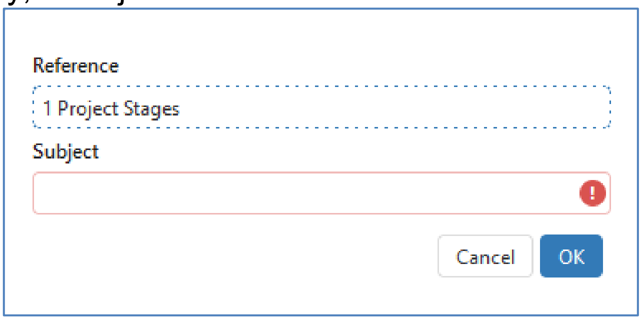


7.4 Collaboration

In the "Collaboration/Comments/Notes" tab, checklists can be created to track the current status of the work:

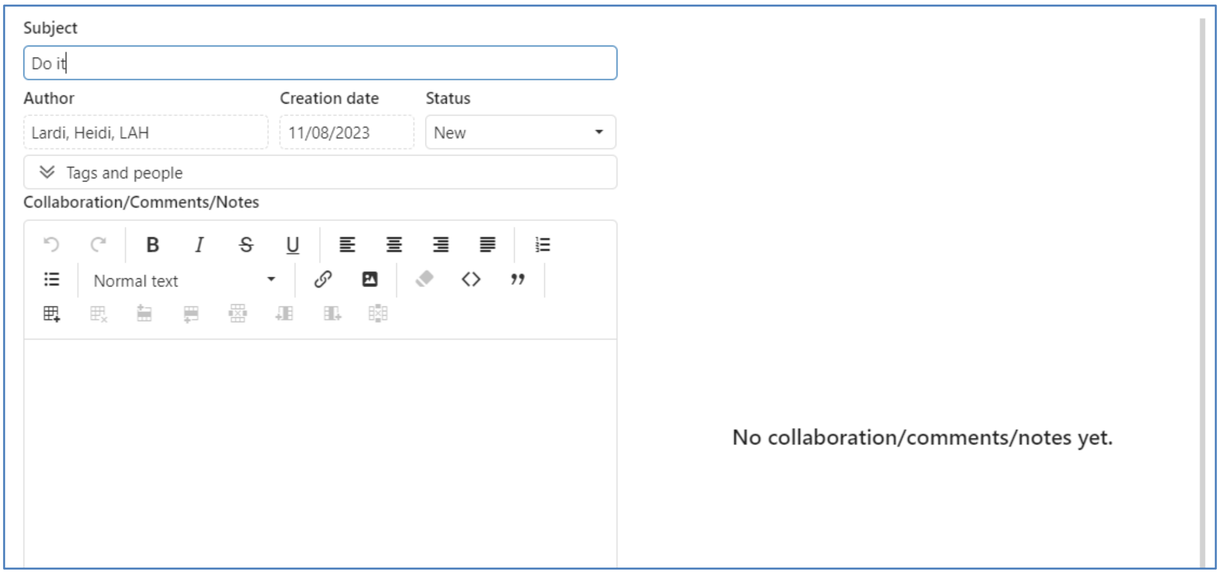


The reference, which records the assignment of the collaboration, is automatically captured. Additionally, a subject must be defined:



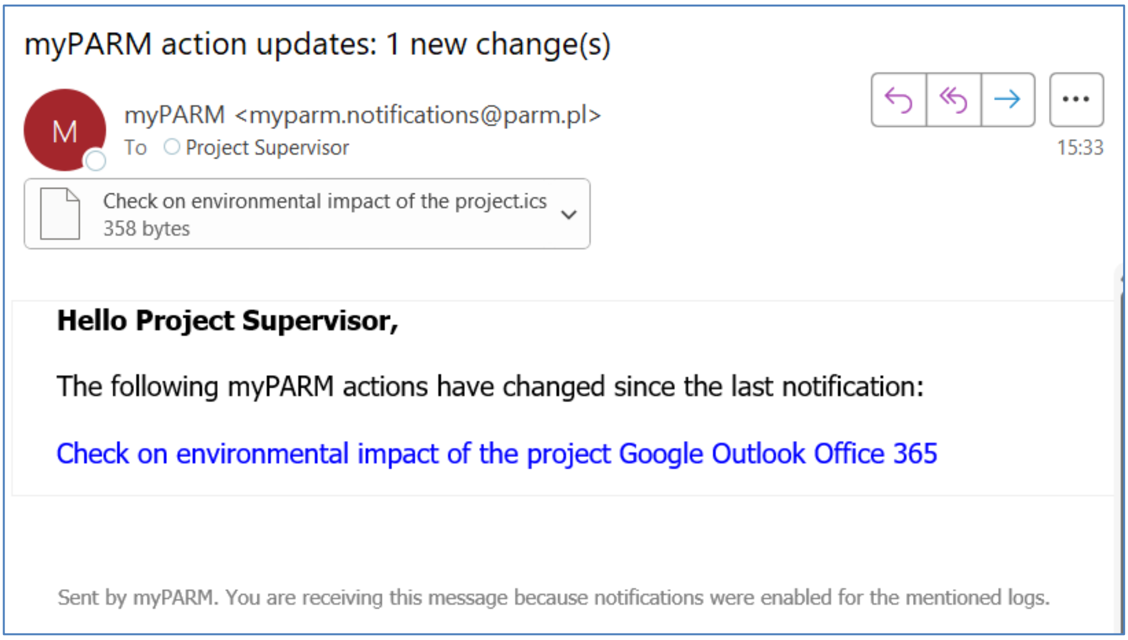
Similar to tasks, in collaboration, there is also the option to use tags, select observers, notify them, and create a checklist.

Below the checklist, there is a free text field where you can also insert images or links. After saving, the comments are marked with the author's name and the date.

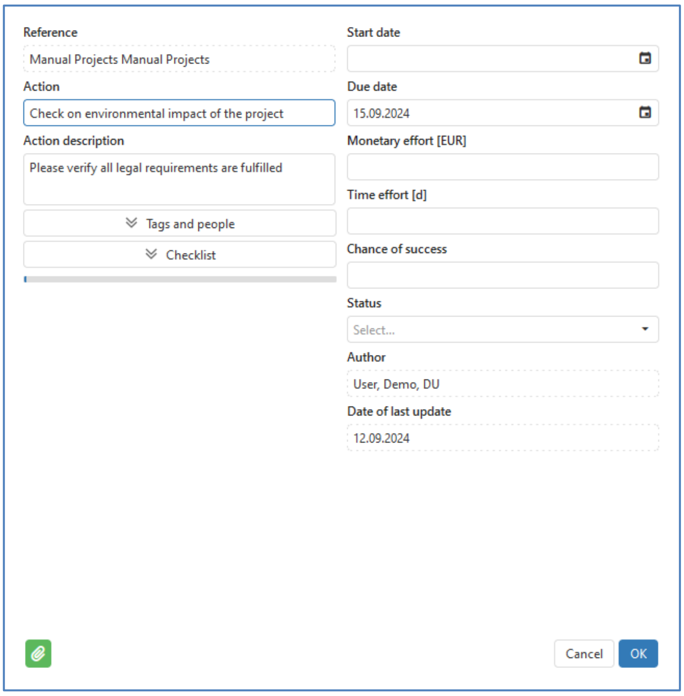

Subject
Do it
Author
Creation date
Status
Lardi, Heidi, LAH
11/08/2023
New
Tags and people
Collaboration/Comments/Notes
Normal text
No collaboration/comments/notes yet.

8. Email notification

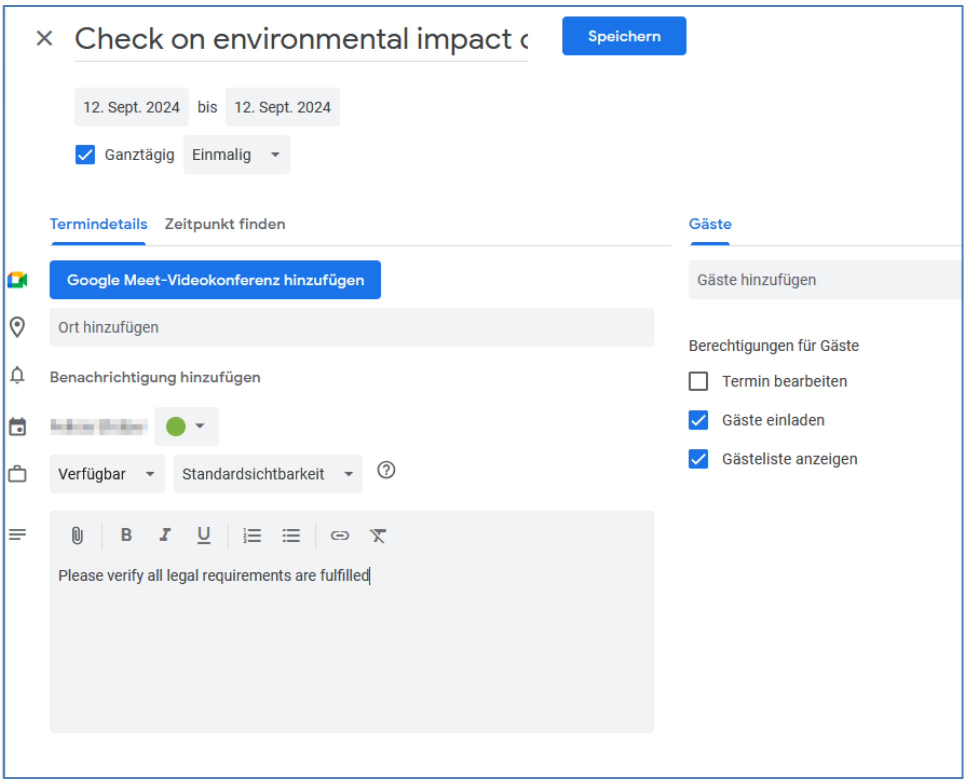
If the email address is stored under "Business Contact Details" in HR, the employee will be notified by email about the task assigned to them. For the Google and Outlook calendar entries, an end date must be entered in the task to generate the links as described here.



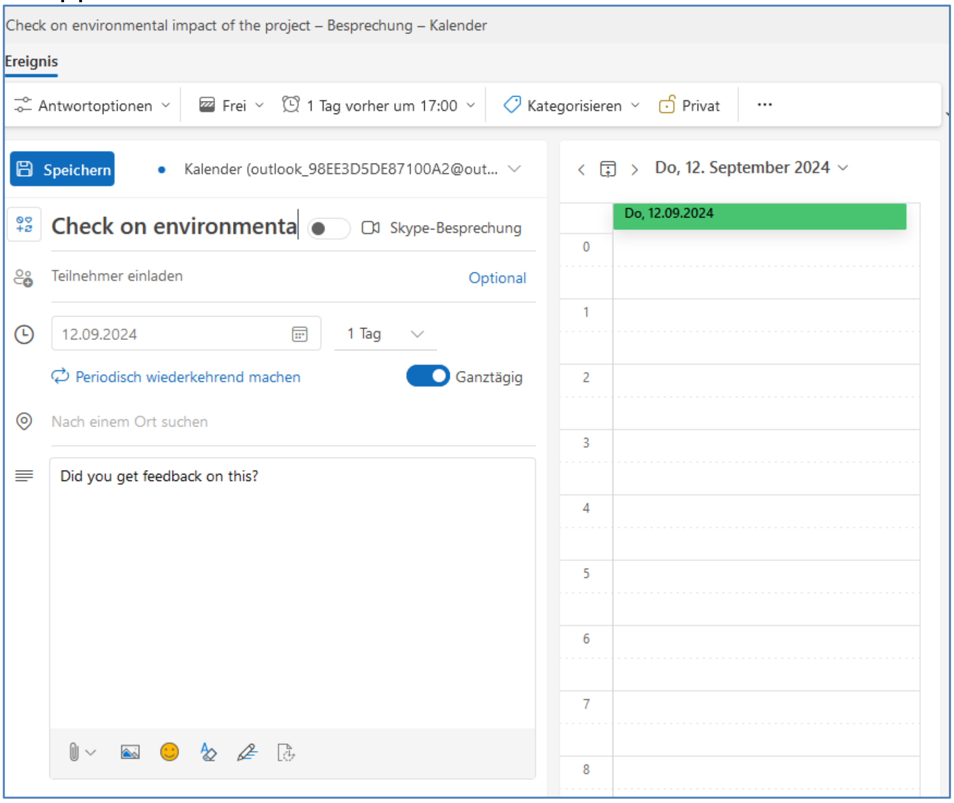
If the blue-marked link on the far left is clicked, the task in myPARM will automatically open.



If the word "Google" in the link is clicked, the Google Calendar will open and directly display the appointment for the task, which only needs to be saved.

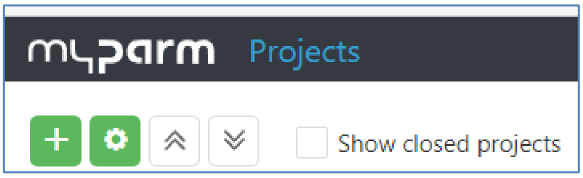


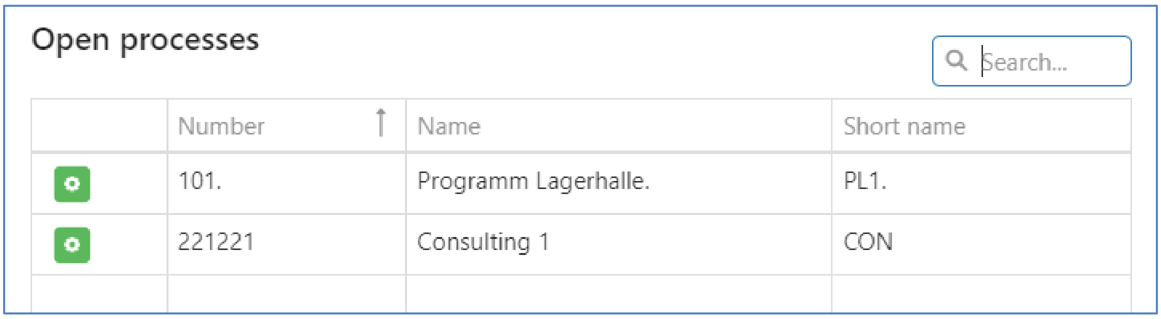
With the "Outlook" link, the Outlook Calendar opens with the entry ready to be saved. The same happens with the "Office 365" link.



9. Running processes

The event overview of pending processes is only displayed when required.
If you click on the green gear, a list of all pending processes appears in the project portal.





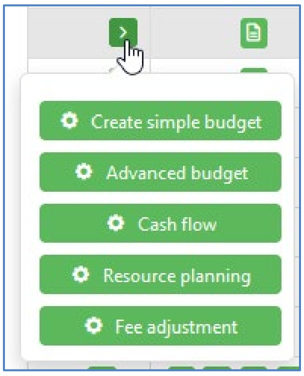
Press now on the gear, the process opens and could be finished now.

10. Budgeting

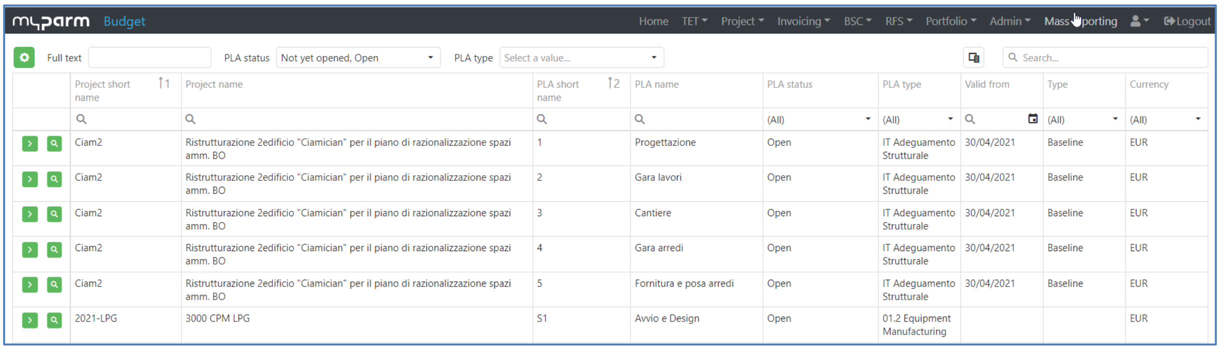
To meet the diverse requirements of organizations, myPARM offers multiple budgeting options, which are often further configured to suit the specific needs of the company.

Before creating a budget, the project must first be created and approved. The project structure should be defined to the extent that the PLAs are known. The PLAs do not need to be open at this stage. However, once costs are incurred (e.g., hours have been logged, expenses recorded, or invoices issued), these are already taken into account in the budgeting process.

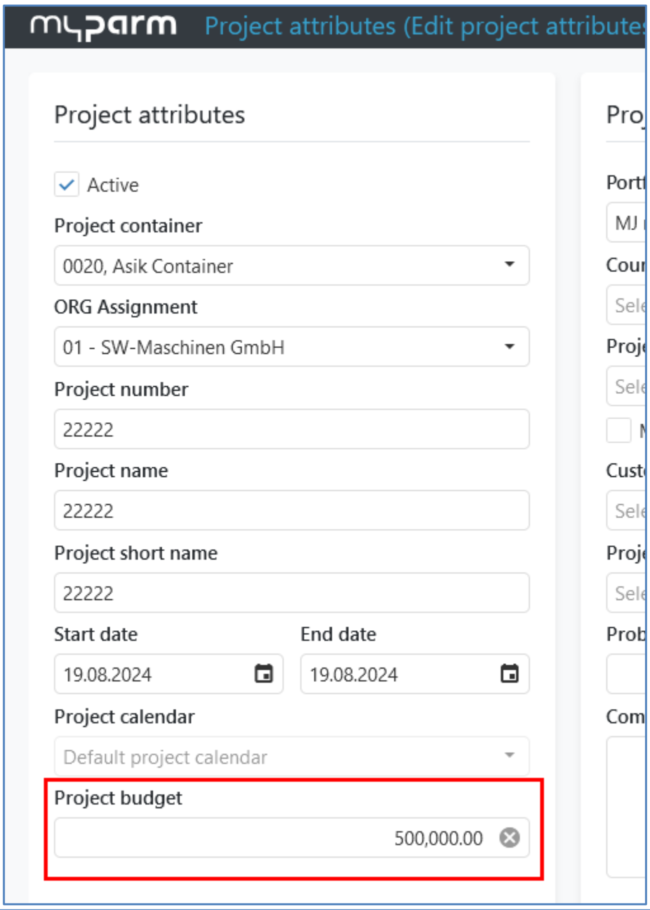
Budgets can be created directly from the project portal:

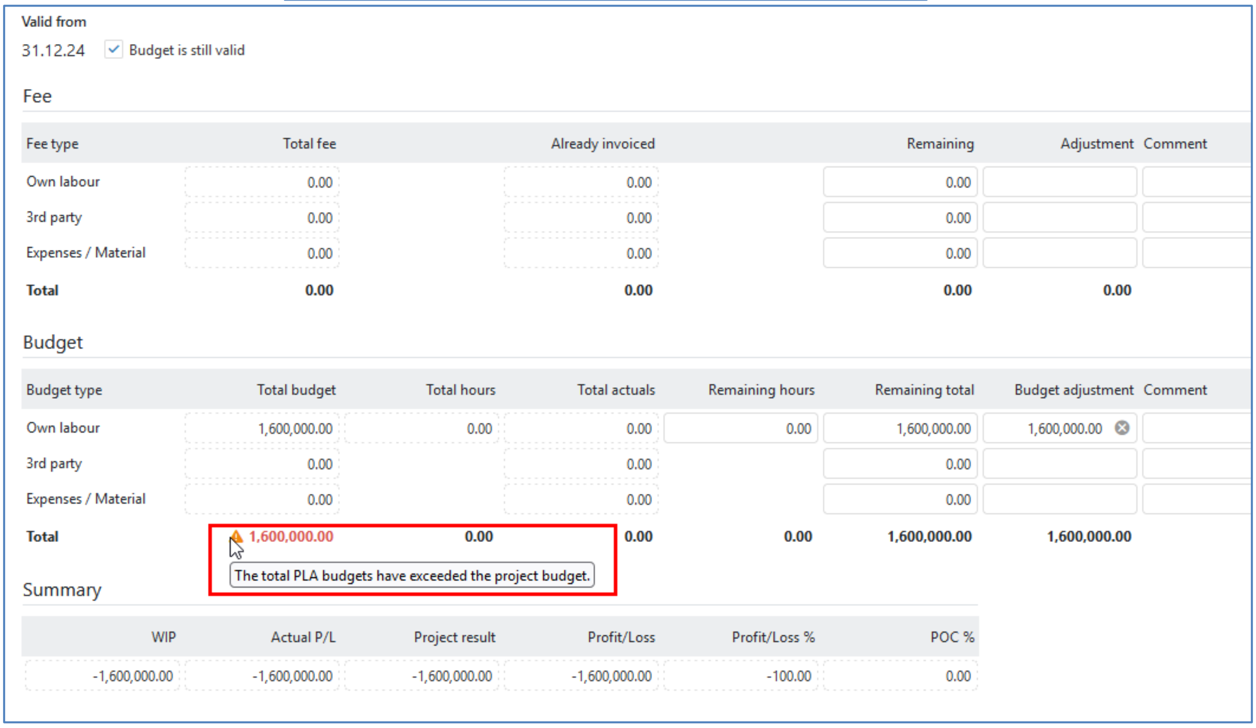


If dedicated budget reviews are required, users can access all budgets via the Project menu. Most customers use these views in such a way that project managers create the budget promptly during project creation, while PMO roles utilize the budget overview to review budgets.
The budget overview displays all PLAs for which a budget has already been created (the "Valid From" column contains a date) or for which a budget can still be created. This view can be individually saved per user and includes additional workflows, configured according to the specific needs of the organization.



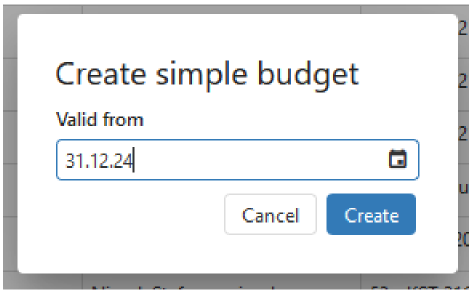
If a total project budget is already defined in the project attributes, myPARM will issue a warning at the PLA level if this budget is exceeded.





Since budgeting is closely linked to revenue (cash flow) and resource planning, a transition to these workflows is also provided. The totals from the budgeting process are incorporated into the cash flow or resource planning if these are being utilized.

For both basic and advanced budgeting, the process begins with a prompt for the "Valid From" date.



This proposal depends on the specific customer setup. Currently, the following settings are commonly used:

- End date of the last completed calendar month
- End date of the last closed period
- End date of the last temporarily closed period

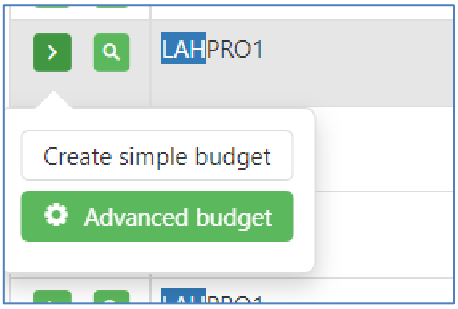
This date determines which version is displayed in evaluations and similar areas. Typically, the first budget version is created at the start of the respective PLA (Version 1) and later adjusted.

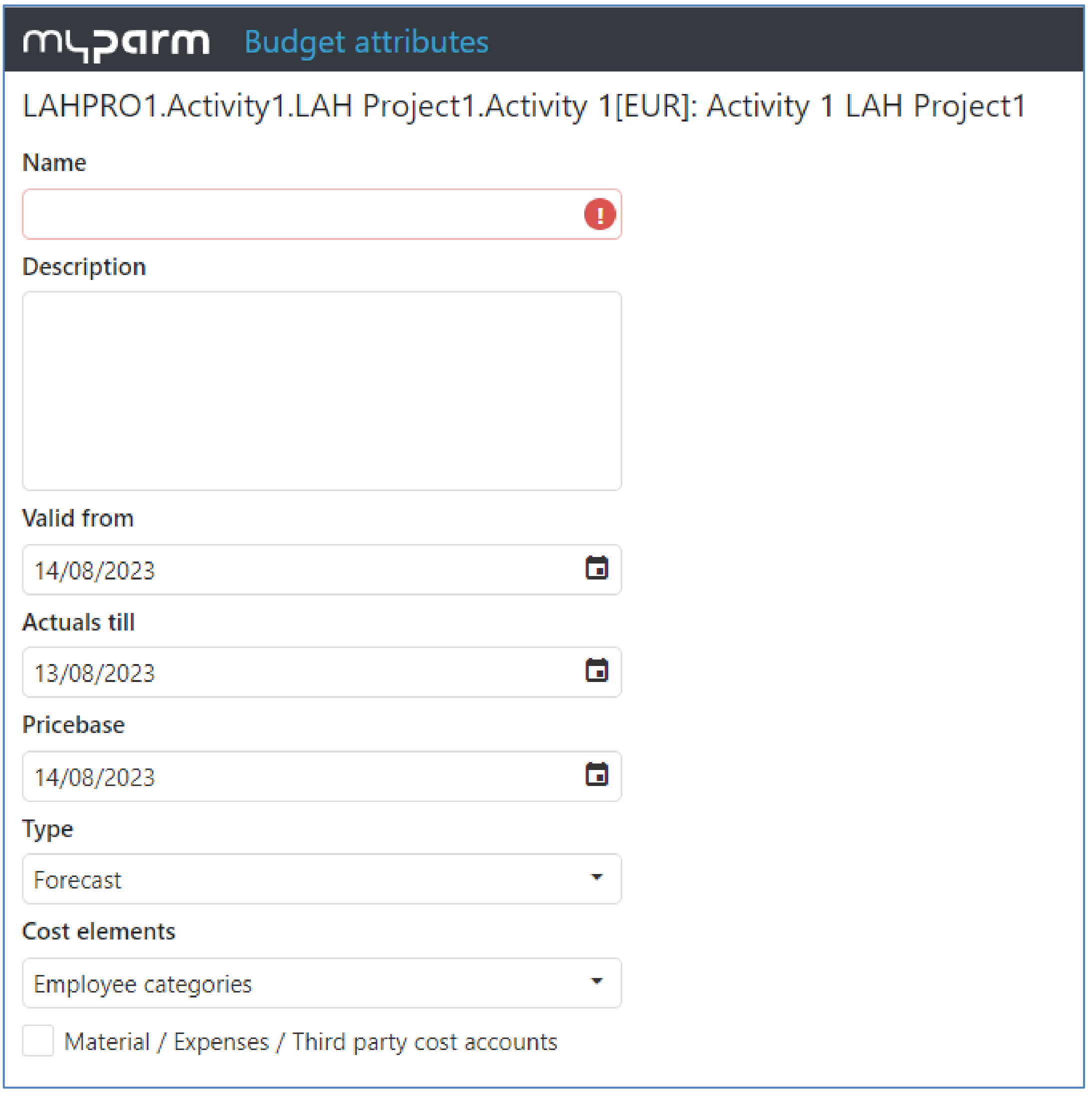
For example, if a budget is created on January 1st and a second on January 31st, all evaluations and views will reflect the budget values from January 1 until January 30th. Starting January 31st, the values from January 31st will apply.

Budget distribution, on the other hand, varies depending on the project or project type. myPARM customers either distribute the budget evenly over the duration of a PLA, manually allocate it to specific months, or divide it according to general patterns (e.g., front-loaded, mid-loaded, or back-loaded budget).

10.1 Advanced Budget

This is a process that leads through the creation of the budget.
Start the process "Advanced budget". Be aware that it is not possible to switch between the kind of budget. If you have added a simple budget, you must continue with simple budget and vice versa:





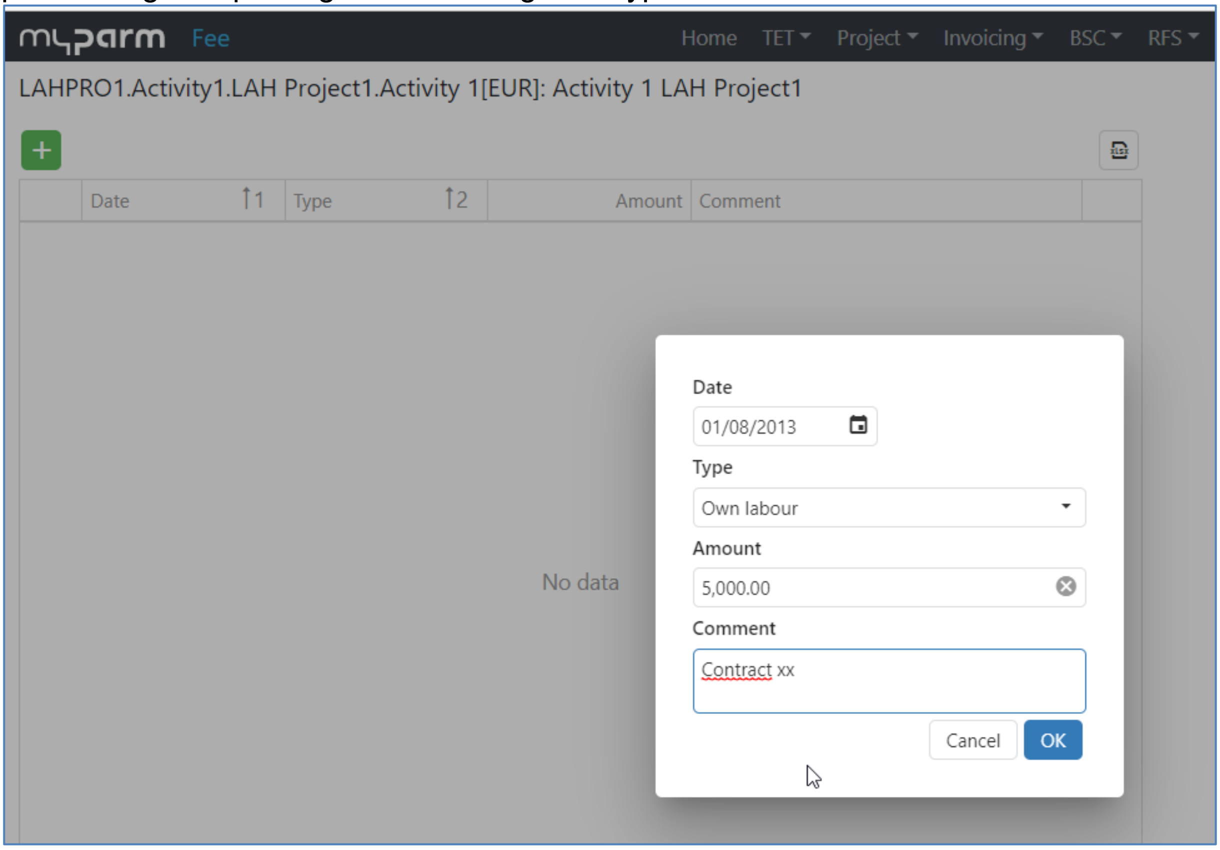
The budget is given a name. Description of the budget can be entered.

Valid from:	from when the budget should be valid
ACTUALS till:	until when should the already booked costs be displayed (by default 1 day before the "Valid from" date)
Price basis:	What costs should be taken for the hours

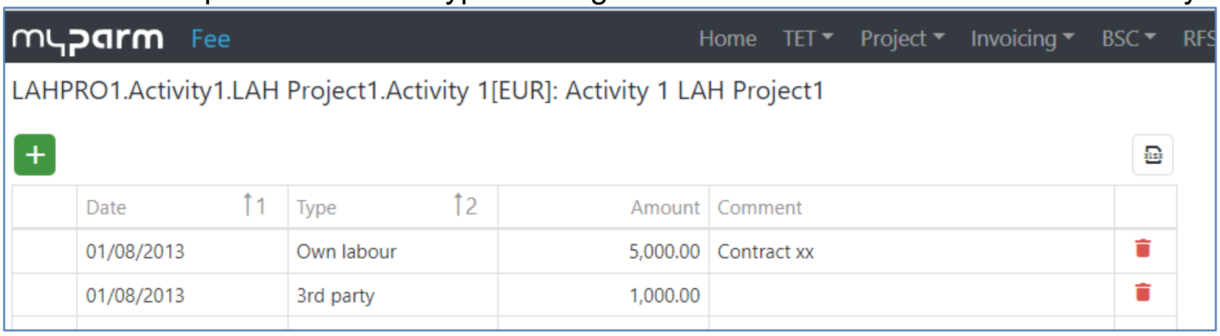
Type: Is it a baseline (usually the first budget) or a forecast (subsequent budgets)
Cost elements: How should the budget be set up: by revenue type, employee categories or time types
Material types: Should the types for expenses / material be displayed.

Once the fields have been filled in, click on "Save & Next" to go to the next step.

Fee:
The fee for own services, third-party services and expenses/material is entered, provided these are available in detail. Press the green plus and a pop-up opens. Check the date, the type and add an amount. Then press ok. If you must add third party costs, press the green plus again and change the type.

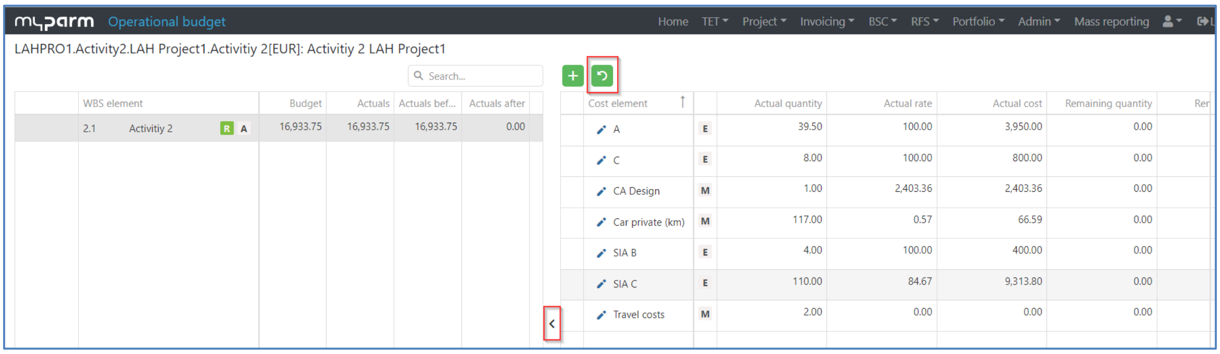


This can be repeated for each type. Changes in the fee are also recorded in this way.



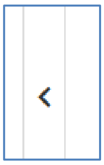
"Save & next"
The next step is "Operational Budget"

The PLA selected for the budget is displayed on the left. If you click in the row you will see the chosen cost elements.

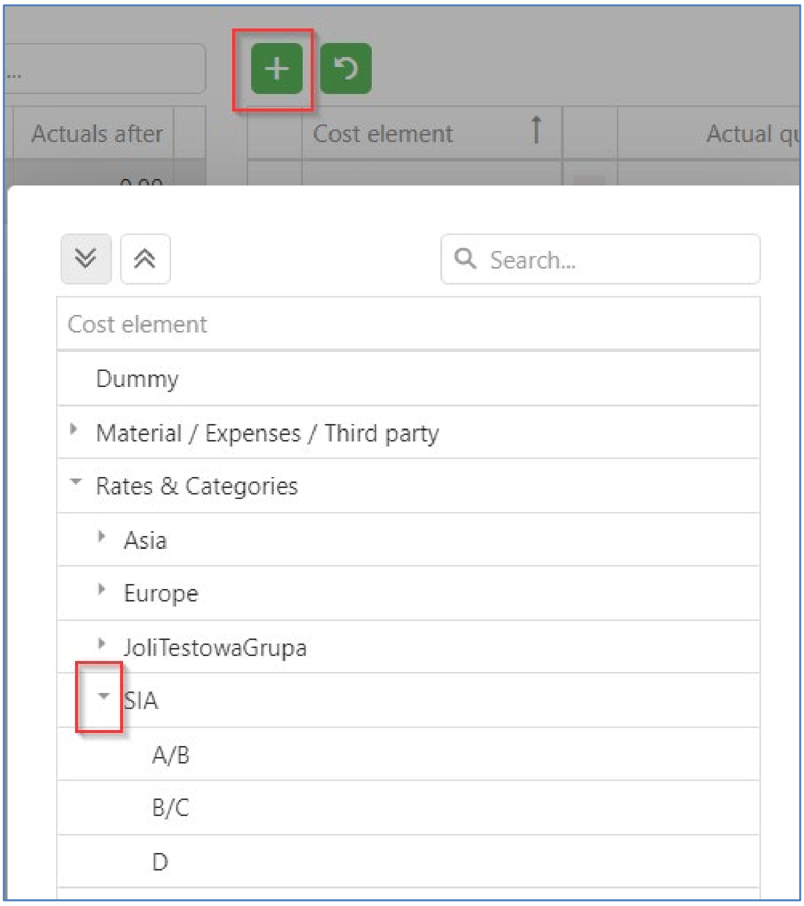


The already actual entries are listed with the quantity, rate, actual cost and the remaining.

In the middle of the screen, you see the following symbol to enlarge the right side of the screen:

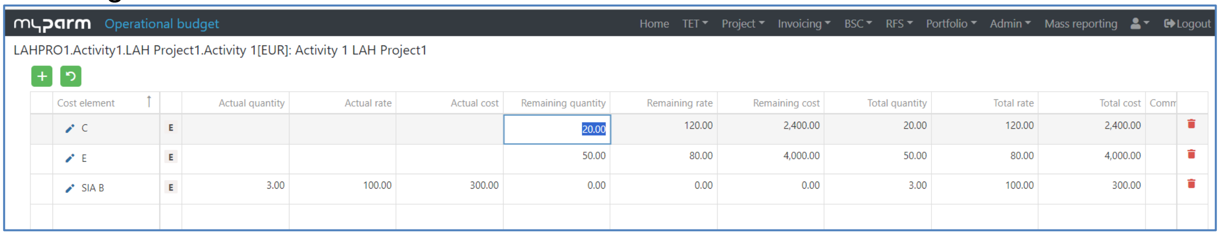


Pressing the green plus brings up a new window showing the items defined on the first page of the budget. A dummy element can be budgeted. Note that there is never an ACTUAL cost on this item.



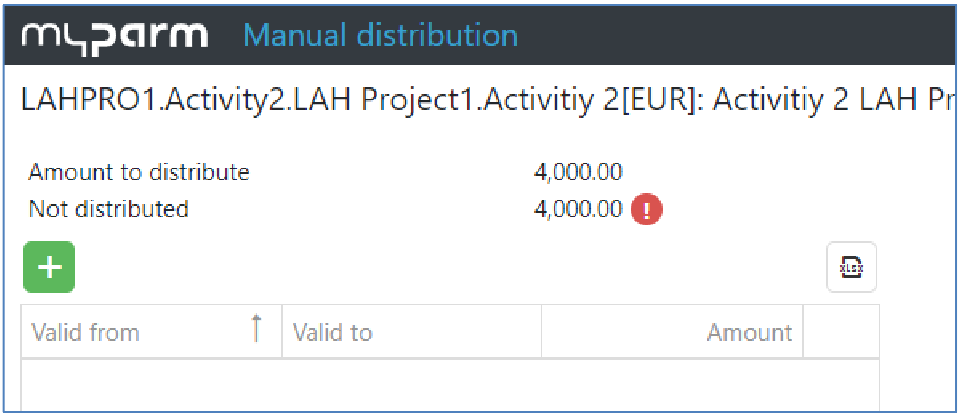
If you now click on the small arrow to the left of the type, a window opens with all expenses / material and third-party service types that are available in the system.

Mark an element and it is entered into the budget with OK and the assistant now helps with the remaining budgeting of the selected item. The remaining is always budgeted. For the first budget this is the total amount, for further budgets it is only the remaining until the end of the project. Clicking in one of the added values (fields) you will be able to change the entries.

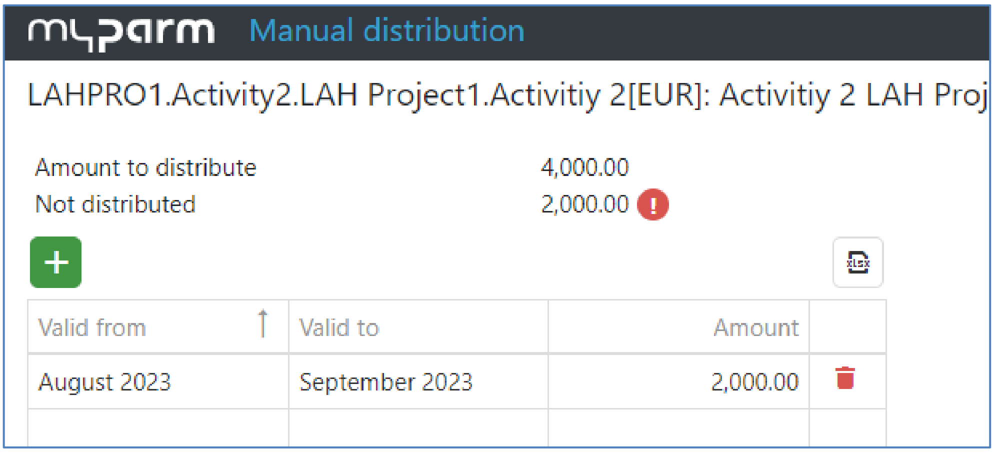


The letters E and C stand for **Employee** category and **Cost** account.
Once all costs have been entered, continue with "Save & Next".

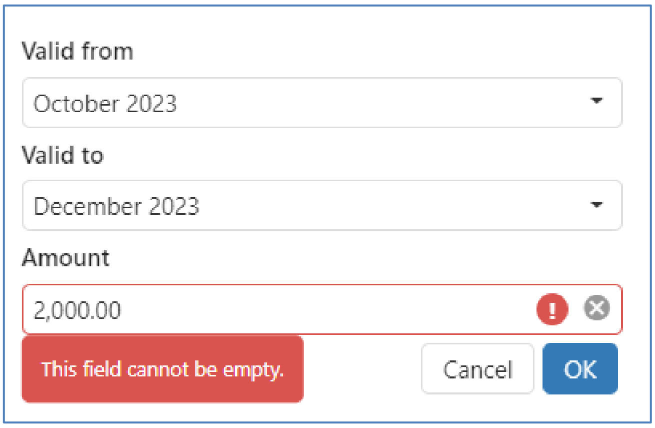
It is now a matter of distributing the remaining costs on the time axis.

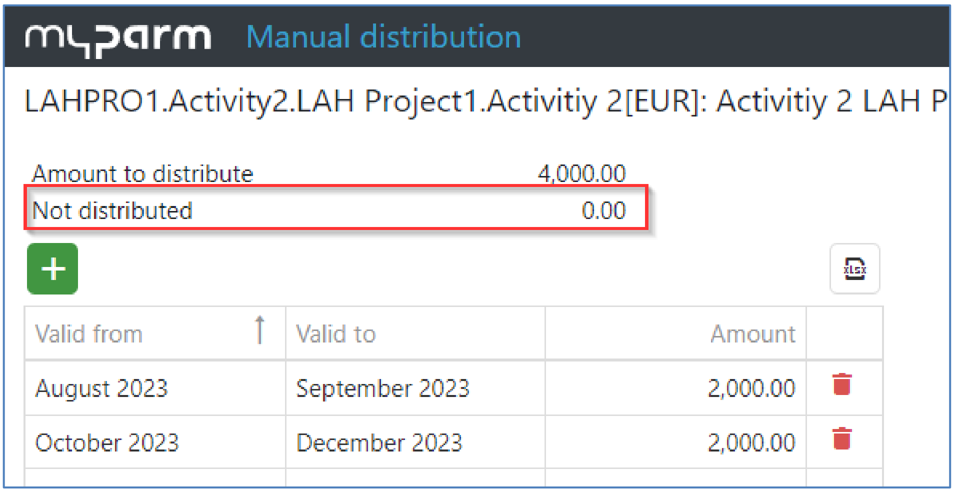


Pressing the green plus opens an assistant in which the costs are now distributed.

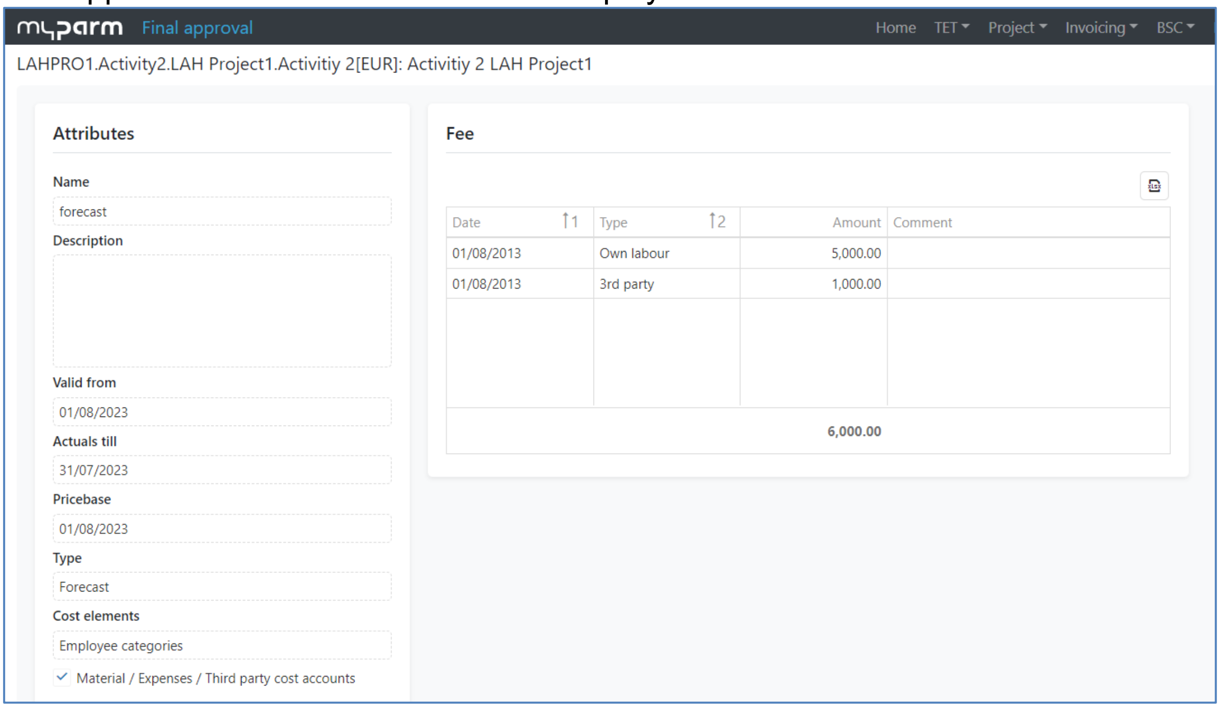


The months “Valid from” and “Valid to” are now selected and the corresponding amount entered and confirmed with OK or select another period for Valid to. Pressing the plus again opens the window again. The following month (after the previous entry) is already specified and only the month "Valid until" is selected and the amount entered. You can change the Valid to if necessary.





Once everything has been distributed, click "Save & Next" to go to the next step, the final approval. The entered data is now displayed in detail here.



Manual distribution

Valid from	Valid to	Amount
August 2023	September 2023	2,000.00
October 2023	December 2023	2,000.00

Budget distribution in WBS

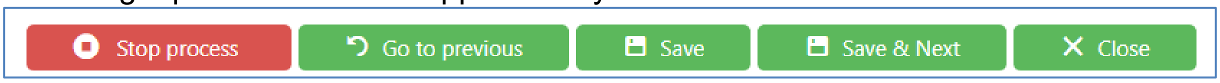
WBS element	Budget	Actuals	Actuals before	Actuals after	Remaining	Start date	End date
Activitiy 2	20,933.75	16,933.75	16,933.75	0.00	4,000.00	01/08/2013	31/12/2025

Budget

WBS element	Cost element	Actual cost	Remaining cost	Total cost	Comment
Activitiy 2	A	3,950.00	0.00	3,950.00	
Activitiy 2	C	800.00	0.00	800.00	
Activitiy 2	CA Design	2,403.36	0.00	2,403.36	
Activitiy 2	Car private (km)	66.59	0.00	66.59	
Activitiy 2	D		4,000.00	4,000.00	
Activitiy 2	SIA B	400.00	0.00	400.00	
Activitiy 2	SIA C	9,313.80	0.00	9,313.80	

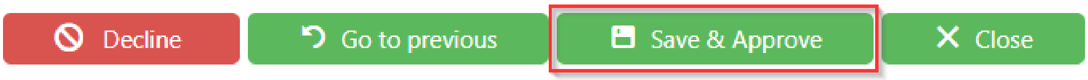
If you now continue with "Save & Approve", the budget is complete. If the user does not have permission to approve the budget, it appears to the approver, who checks the budget and, if everything is ok, also approves it.

At each step in the budget, you can go to previous page and make changes.
The budget process can be stopped at any time when it should not continue.



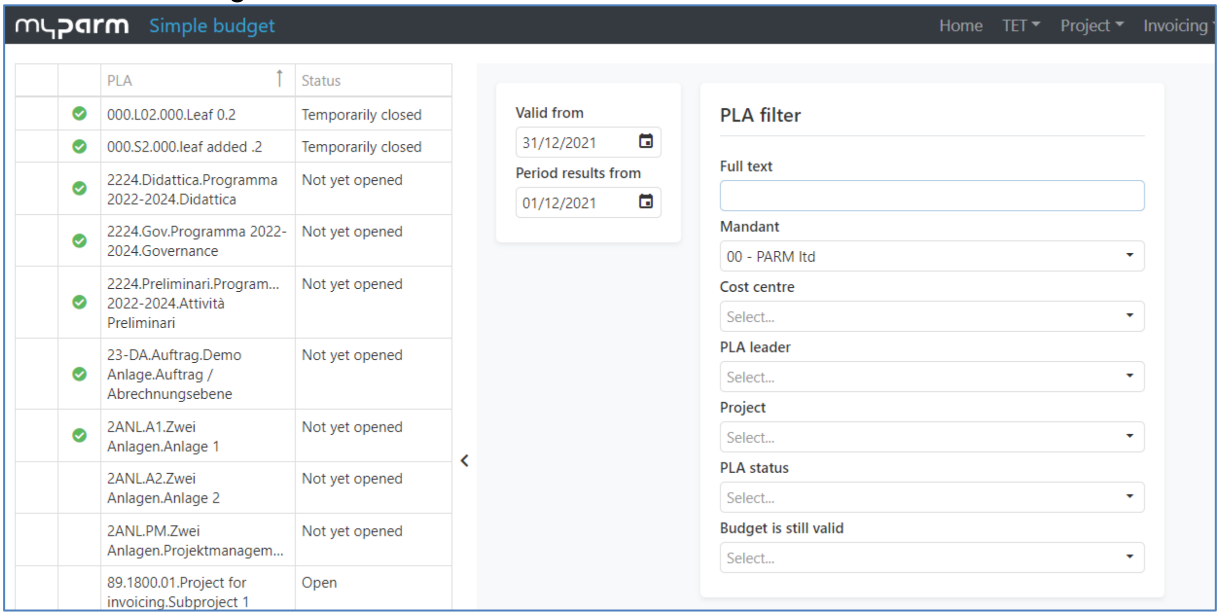
The recorded data is saved with the «Save» button. The budget is closed with the "Close" button, and you can continue at a later point in time. It should be noted that a pending budget process means that the project structure cannot be adjusted.

If the budget is not approved, it is not possible to make any changes in the project structure.



10.2 Simple Budget

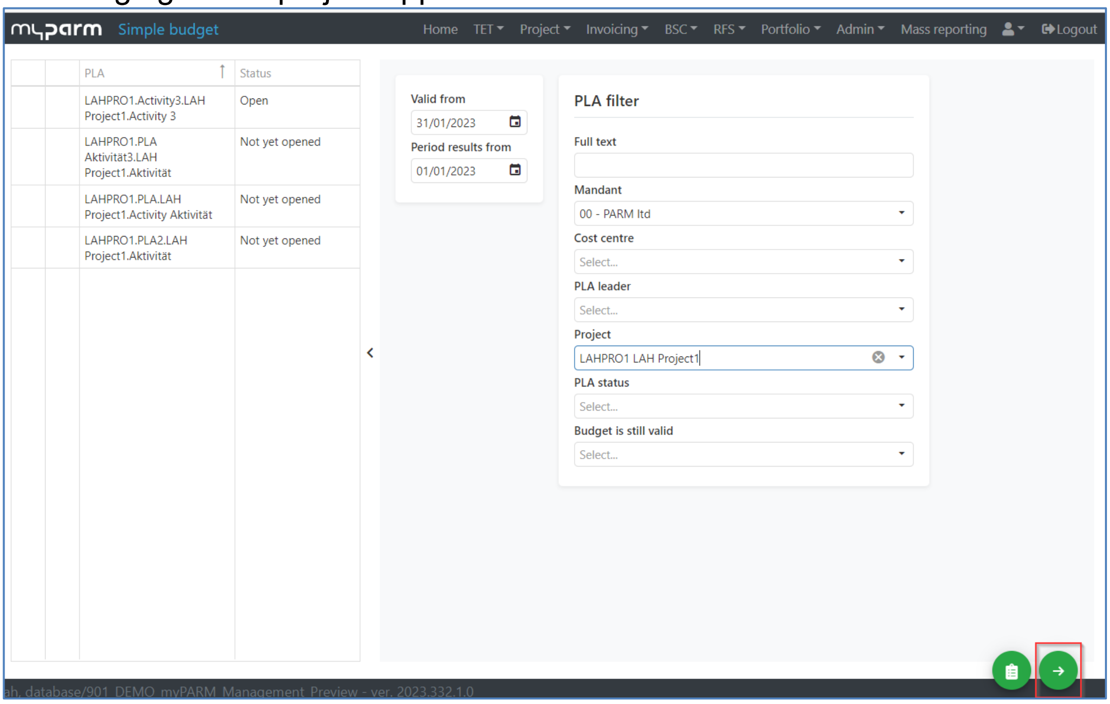
In general, a simple budget can be created. Simple budget is always done on the PLA level . There are various filter criteria such as project manager, project, cost centre, etc. for searching for a PLA.



"Valid from" is the date from which the budget should be valid and aligns with the initial selected date from the beginning of the process.
"Period result from" shows the date for the period result report. In this example, that would be from 01/12/2021 - 31/12/2021.

All PLAs for which a budget can be created are displayed on the left-hand side. Either you scroll through the list or select one or different elements in the filter.

If you select a project in the filter (either search in the list or enter text manually), all PLAs belonging to this project appear.



With the green arrow pointing to the right (bottom right), "Next," you proceed to the budget entry step.
First, the fee is entered:

- **Fee Type**: Fees can be entered for the types own labour, third-party services, and expenses/material, provided these are available in detail.
- **Fee Total**: The initial entry in the "Remaining" column displays a value here and is adjusted via "Fee Adjustments" and "Already Invoiced." This is reflected in the RM/CF view.
- **Already Invoiced**: If invoices are issued in myPARM or imported into myPARM via an interface, they are displayed under "Already Invoiced."
- **Remaining**: Directly calculates the amounts under "Fee Adjustments."
- **Fee Adjustments**: Adjustments to the initially entered fee values can be subtracted using a negative sign. Without a negative sign, the amount will be added.
- **Comment**: If adjustments to the fee are made, they can be documented with a comment.

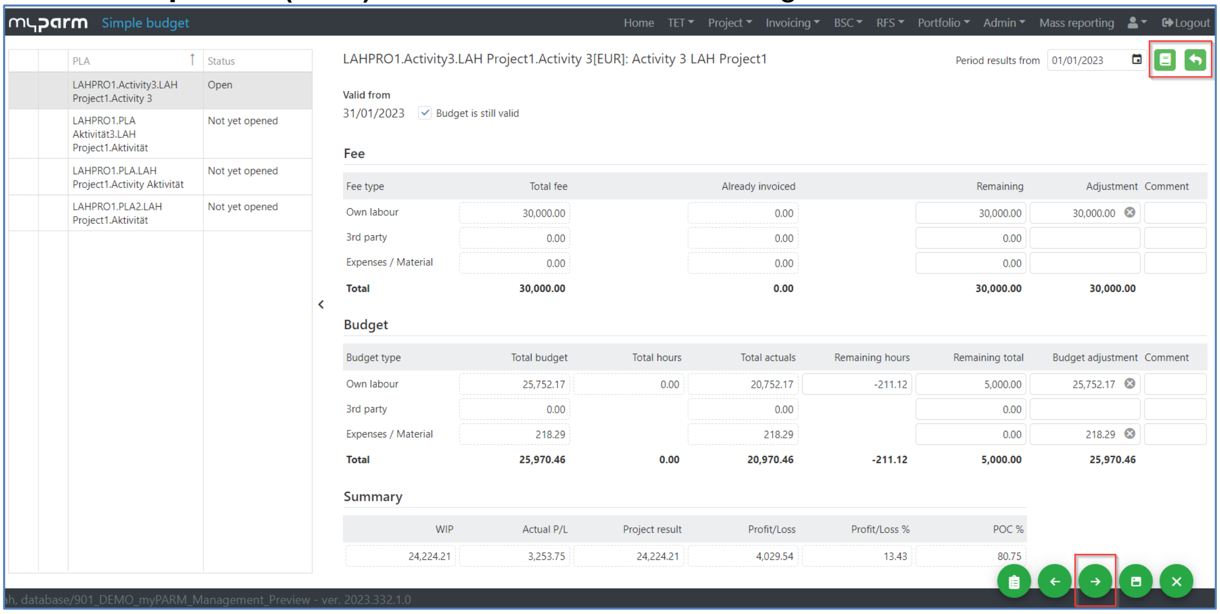
Next, the effort budget is entered. The hours already worked as of 01.02.2023 are displayed.

- **Budget Type**: Budgets can be entered for the types own labour, third-party services, and expenses/material, provided these are available in detail.
- **Budget Total**: This is reflected in the RM/CF view.
- **Hours Total**: The initial entry in the "Remaining Hours" column displays a value here and is adjusted via the inputs in "Remaining Hours."
- **Total Actual**: If costs have already been recorded for the PLA, they appear here.
- **Remaining Hours**: Entry of hours.
- **Remaining Total**: Directly calculates the amounts under "Budget Adjustments."
- **Budget Adjustments**: Adjustments to the initially entered budget values can be subtracted using a negative sign. Without a negative sign, the amount will be added.
- **Comment**: If adjustments to the budget are made, they can be documented with a comment.

As soon as numbers are entered, a checkmark is automatically set. Undoing all actions will remove the checkmark. Users with access to budgets will know these are current and verified figures.

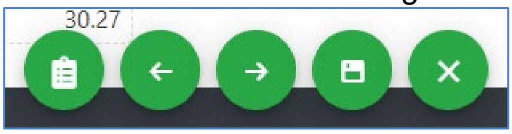
In the summary, there is already an overview of the key metrics:
- **WIP** = Total Actual + Realized P/L + Already Invoiced
- **Realized P/L** =
  - If P/L < 0: Profit/Loss
  - Otherwise: (Profit/Loss * POC) / 100
- **Contract Value** =
  - If Profit/Loss is positive: Total Actual + Actual Profit/Loss
  - Otherwise: Project Result = Total Actual + Profit/Loss
- **Profit/Loss** = Fee – Budget. Directly shows the difference between fee and budget. A loss is indicated by a negative sign.

- **Profit/Loss %**: Shows the percentage profit or loss. A loss is indicated by a negative sign.
- **Completion (POC) %** = Total Actual / Total Budget



In the picture at the top right there are also the "Undo" button - if you want to undo the entries. The "Period result" button creates the corresponding report directly.

The buttons on the bottom right have the following functions:



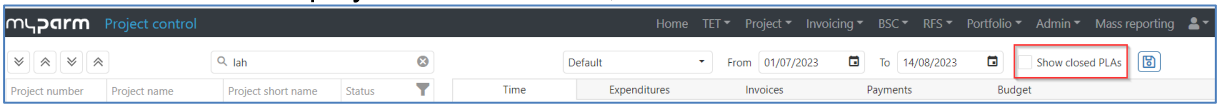
On the far left is the history button. All previously created budgets on the PLA are displayed.

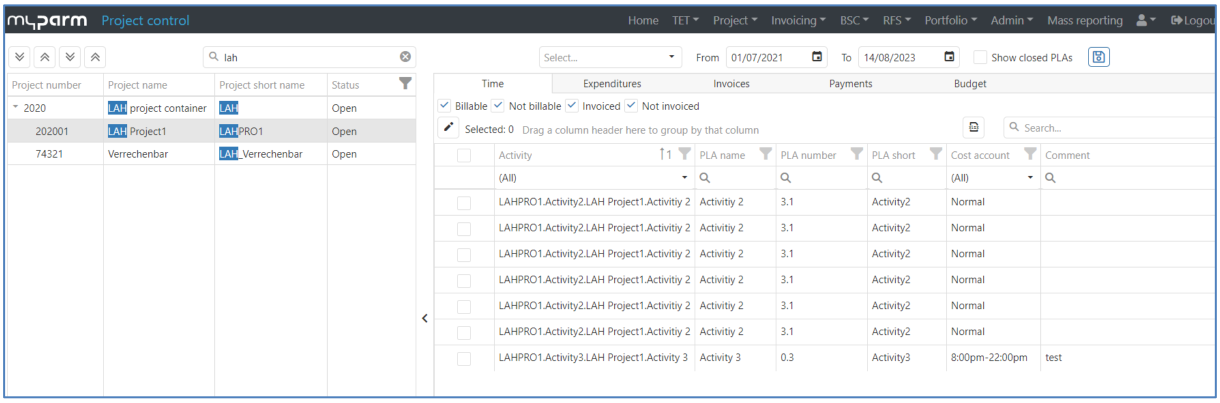
Use the left or right arrows to switch to the next or previous PLA. The entries are automatically saved between the individual budgets. If the last assessment is still in the current view, the "Save & finish" command is pressed, and the system returns to the initial screen.

If you press the green X and the values in the current view have not yet been saved, you will be prompted that the data has not yet been saved and whether you want to continue. Then the evaluation process closes, and you get back to the start page.

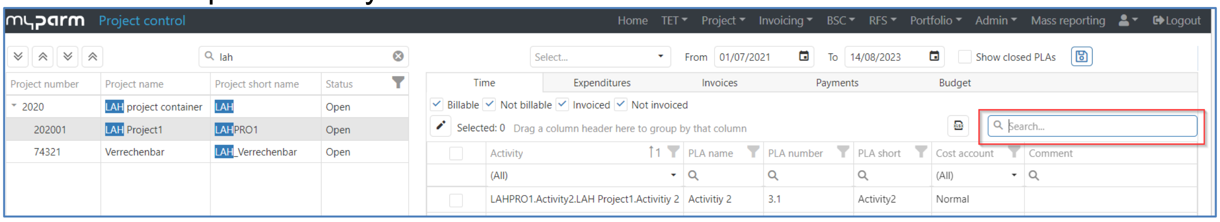
11. Project control

The services rendered in hours and expenses are displayed for the selected PLA and the period. Furthermore, the invoices and payments are shown, as well as the currently valid budget with actual figures up to the selected "to" date. By default, no closed projects are displayed. To also display closed projects, "closed" is also marked in the Status column. To display closed PLAs too, the field "Show closed PLAs" is marked.



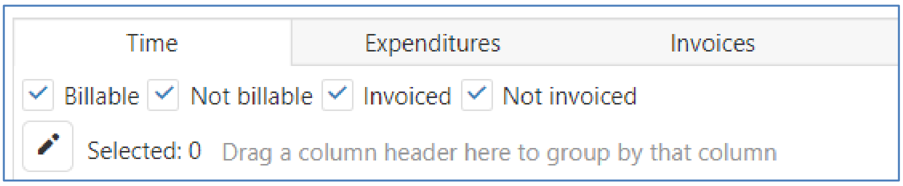


The best and quickest way to look for a PLA is to enter text in the search field.



For the period, the data can be overwritten manually, or you can choose the time frame.

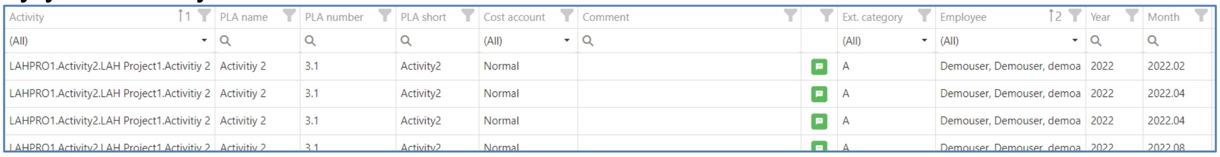
Default:	First day of the past month to date
Current Period:	First day of the current month to date
Current year:	First day of the current year to date
Project status today:	Start date of the PLA up to today.



Billable:	Display of TET entries that are billable
Non-billable:	Display of TET entries that are non-billable
Invoiced:	Shows the TET entries that have been billed
Not invoiced:	Display of TET entries that have not yet been invoiced.

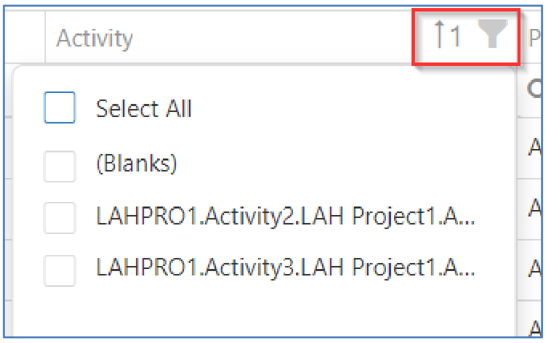
By clicking the arrow in the bar between the projects and the detailed view, the project list disappears, and the detailed view becomes larger. Pressing it again restores the original view.

Anywhere it has a funnel can be filtered in the column. It can also be grouped or filtered by year and by month.



Activity	PLA name	PLA number	PLA short	Cost account	Comment		Ext. category	Employee	Year	Month
(All)				(All)			(All)	(All)		
LAHPRO1.Activity2.LAH Project1.Activitiy 2	Activitiy 2	3.1	Activity2	Normal			A	Demouser, Demouser, demoa	2022	2022.02
LAHPRO1.Activity2.LAH Project1.Activitiy 2	Activitiy 2	3.1	Activity2	Normal			A	Demouser, Demouser, demoa	2022	2022.04
LAHPRO1.Activity2.LAH Project1.Activitiy 2	Activitiy 2	3.1	Activity2	Normal			A	Demouser, Demouser, demoa	2022	2022.04
LAHPRO1.Activity2.LAH Project1.Activitiy 2	Activitiy 2	3.1	Activity2	Normal			A	Demouser, Demouser, demoa	2022	2022.08

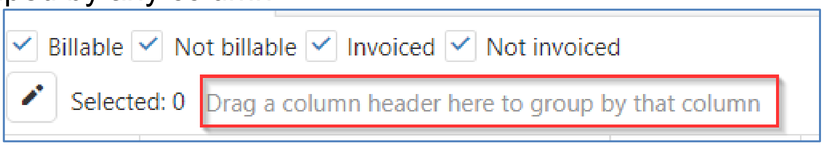
It is selected what is to be displayed in this column and the window is closed again with OK.



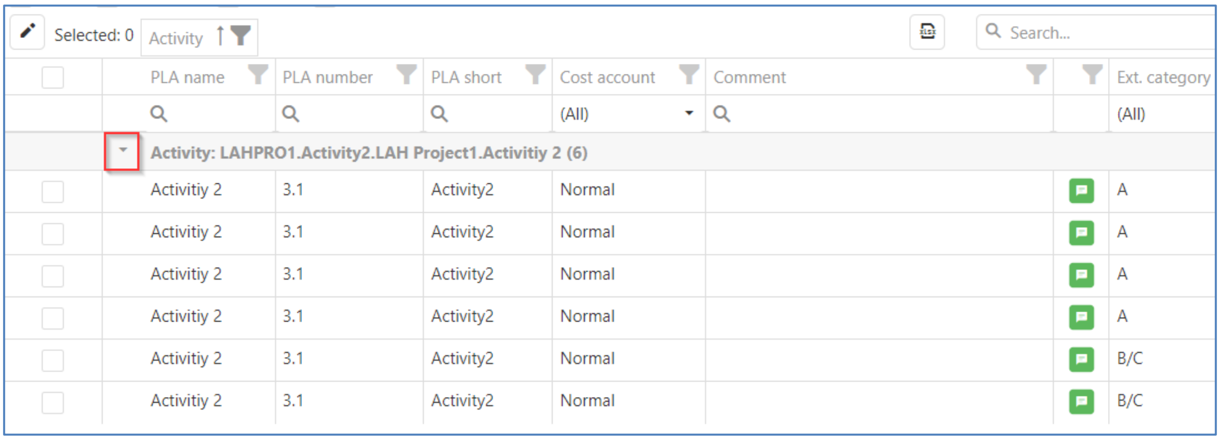
If a filter is set, the funnel is displayed in dark grey.

If you are looking for something that is not displayed, the columns should be searched for filters that have been set and possibly deleted. It is possible to move each column to another place with the mouse.

It can be grouped by any column.



As an example, it is grouped by activity and a total line appears for each PLA.



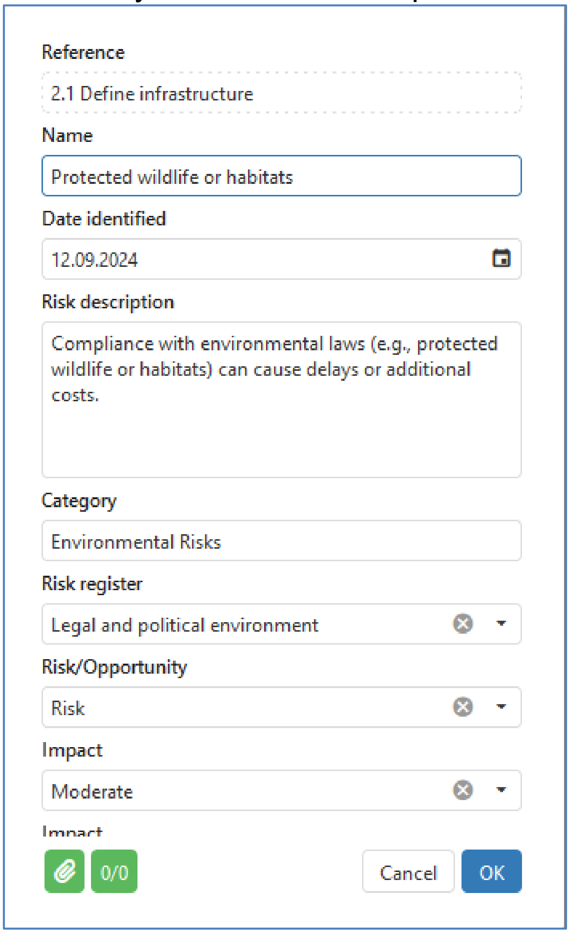
Selected: 0 Activity

PLA name	PLA number	PLA short	Cost account	Comment		Ext. category
			(All)			(All)
Activity: LAHPRO1.Activity2.LAH Project1.Activitiy 2 (6)						
Activitiy 2	3.1	Activity2	Normal			A
Activitiy 2	3.1	Activity2	Normal			A
Activitiy 2	3.1	Activity2	Normal			A
Activitiy 2	3.1	Activity2	Normal			A
Activitiy 2	3.1	Activity2	Normal			B/C
Activitiy 2	3.1	Activity2	Normal			B/C

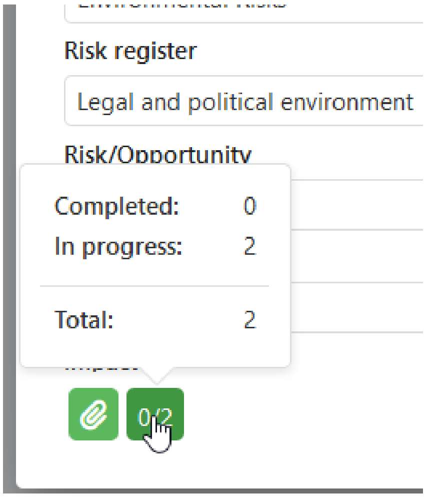
Pressing the arrow on the left will bring up the details.

12. Risk Management

Risk management in myPARM is designed in such a way that risk and quality management are available consistently across all our software modules. Therefore, with every risk identification, the corresponding reference object is always recorded, whether it is a project, product, employee, supplier, customer, organizational unit, strategic goal, key performance indicator (KPI), etc.
With this and many other RM-specific details, all risks and their associated measures in myPARM are collected and displayed within a risk cockpit. Depending on the user's roles and permissions, either all data is visible or only limited access is provided.
Planned measures can be assigned to employees at any time, including a due date. The employees then immediately see these in their personal task list.



For each risk, an unlimited number of measures (measure packages) can be created. These are displayed directly next to the attachments. When selecting the measures, a brief overview also appears, showing how many measures are associated with this risk and what their current status is:



Field Description
The fields can be shown or hidden and can be renamed and partially extended by users with admin rights. For more details, refer to the Admin Manual.

Opportunity/Risk:

- **Reference**: Specifies the reference of the risk (milestone, project, activity, employee, supplier, product, etc.)
- **Name**: Name of the risk/opportunity
- **Date Identified**: Date selection
- **Description of Risk**: Free text field
- **Category**: Free text field
- **Risk Class**: According to likelihood of occurrence and impact
- **Risk Register**: The list can be predefined according to ISO 31000, ONR 49000, or maintained by the customer
- **Selection Field**: Definition of whether it is a risk or opportunity (the following fields may be restricted accordingly)
- **Impact (Qualitative)**: Qualitative selection list
- **Impact (Quantitative)**: Numeric field
- **Description of Impact**: Free text field
- **Probability (Qualitative)**: Qualitative selection list
- **Probability (Quantitative)**: Numeric field
- **Description of Probability**: Free text field
- **Proximity**: Date selection
- **Strategy**: Selection field for risk (Prevent, Transfer, Accept, Mitigate) and opportunity (Exploit, Share, Expand, Accept)
- **Description of Strategy**: Free text field
- **Risk Owner**: Dropdown/selection field from available employees
- **Impact After Action (Qualitative)**: Text selection field
- **Impact After Action (Quantitative)**: Numeric field
- **Probability After Action (Qualitative)**: Text selection field
- **Probability After Action (Quantitative)**: Numeric field
- **EMV (Expected Monetary Value)**: Numeric field
- **Last Update Date**: Non-editable field
- **Author**: Creator of the risk/opportunity (non-editable field)
- **Tags**: Already created tags can be selected or new ones can be created
- **Status**: Selection field: Open, In Progress, Pending, Closed

- **File Attachment**: Unlimited possibility to attach any file formats for each opportunity/risk

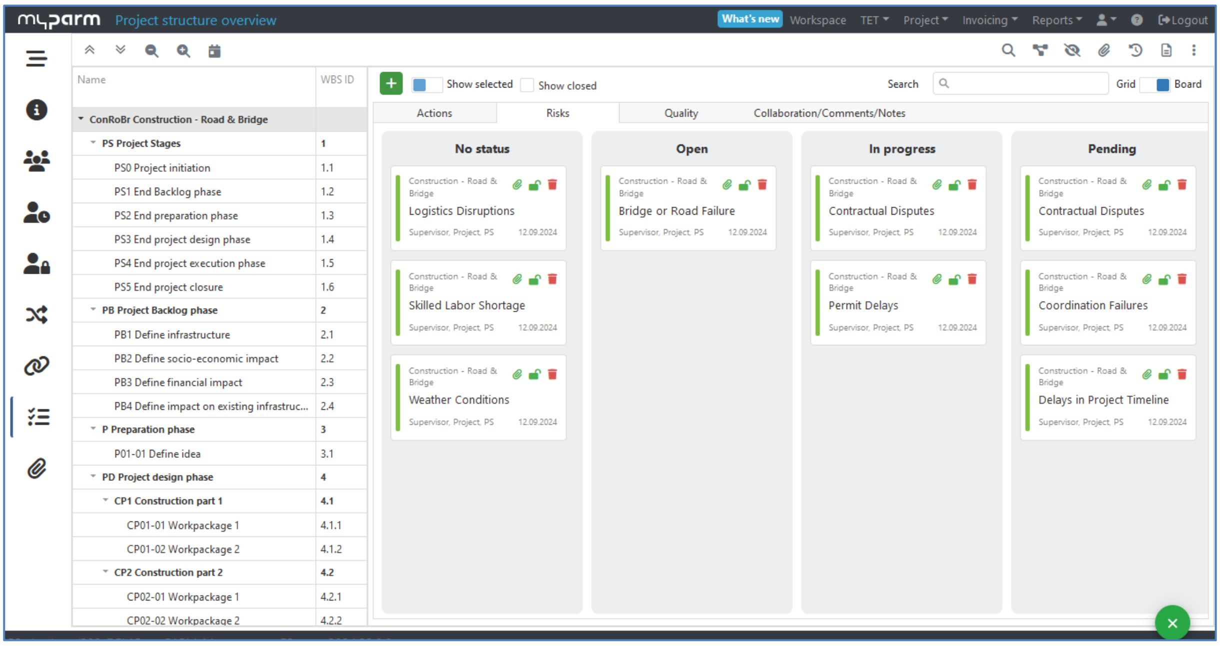
Measures:

- **Reference**: Label, automatically assigned
- **Category**: Label, automatically assigned
- **Measure**: Name of the measure
- **Measure Description**: Comment field for a detailed description of the measure
- **Cost**: Numeric field in system currency
- **Effort**: Numeric field in days
- **Success Probability**: Numeric field in percentage
- **Responsibility**: Dropdown field, all employees can be selected
- **Last Modification Date**: Label, automatically updated by the system
- **Creator**: Label, automatically updated by the system
- **Start Date**: Date selection
- **Due Date/End Date**: Date selection
- **General Status**: Dropdown field, selection can be extended and renamed
- **Status**: Label, automatically updated by the system according to the feedback from the assigned responsible person via their personal task list (Duty Management)
- **Created Task**: Generates a task for the responsible person in their personal task list
- **File Attachment**: Unlimited possibility to attach any file formats for each measure

This structure allows for the effective tracking and management of risks, opportunities, and their related measures within the system.

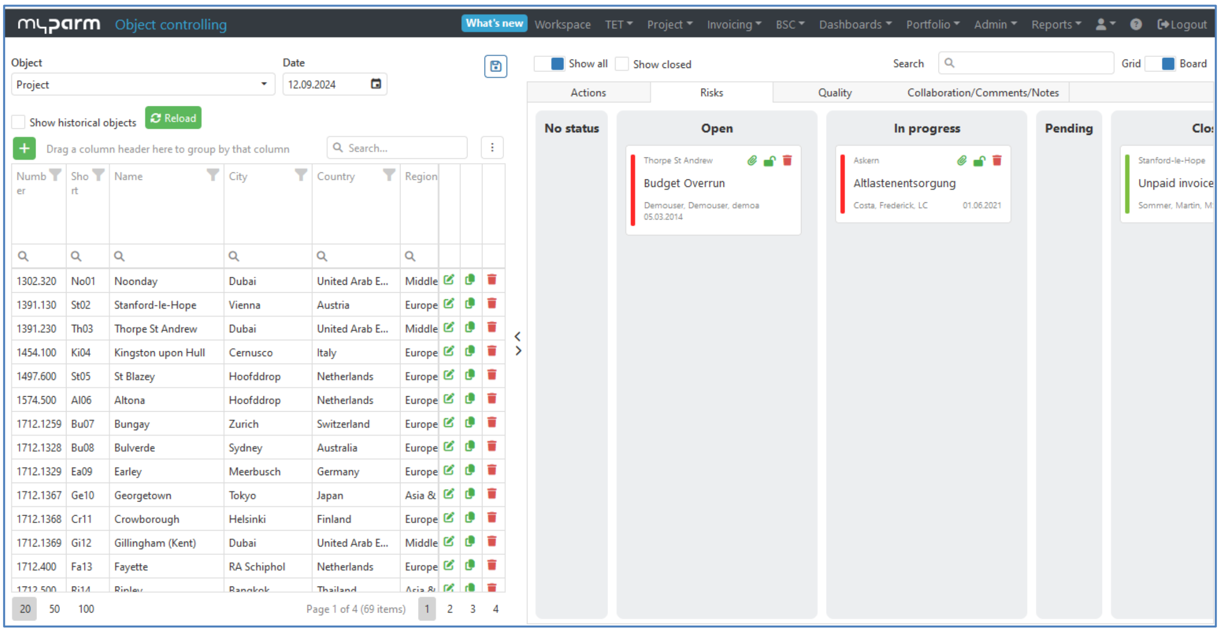
12.1 Opportunities & Risks in Project Planning

Within project planning and execution, opportunities and risks can be recorded for any WBS element (milestone, activity, subproject) or the project itself. Additionally, multiple measures or entire measure packages can be planned for a given risk.

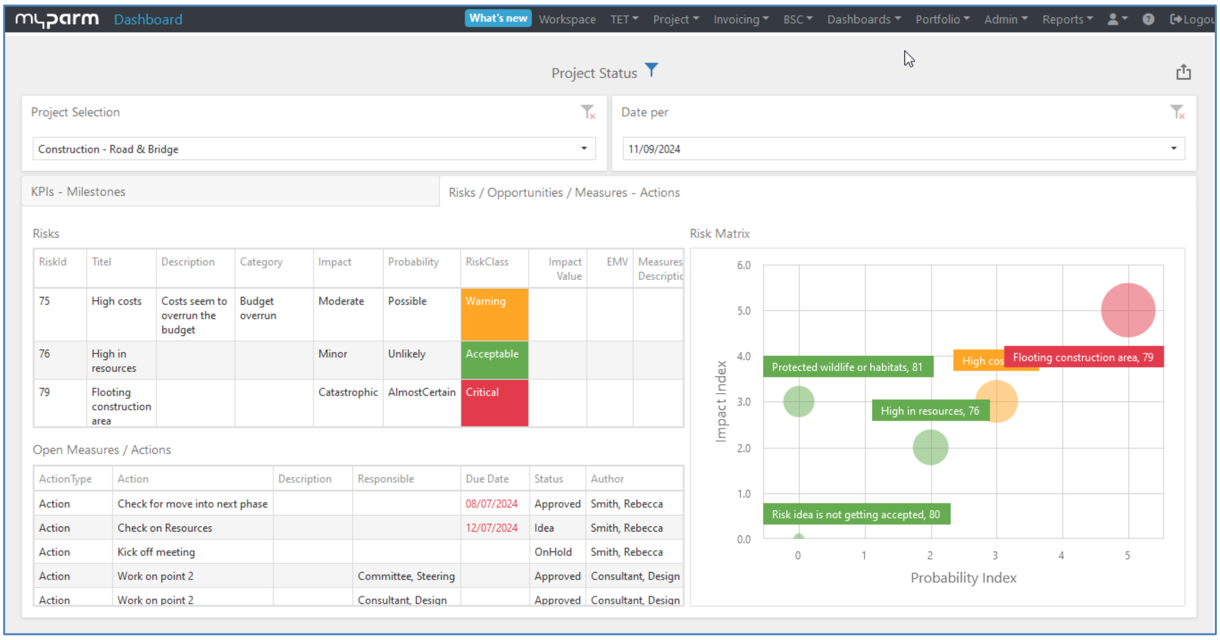


12.2 Opportunities & Risks within MIS and Dashboards

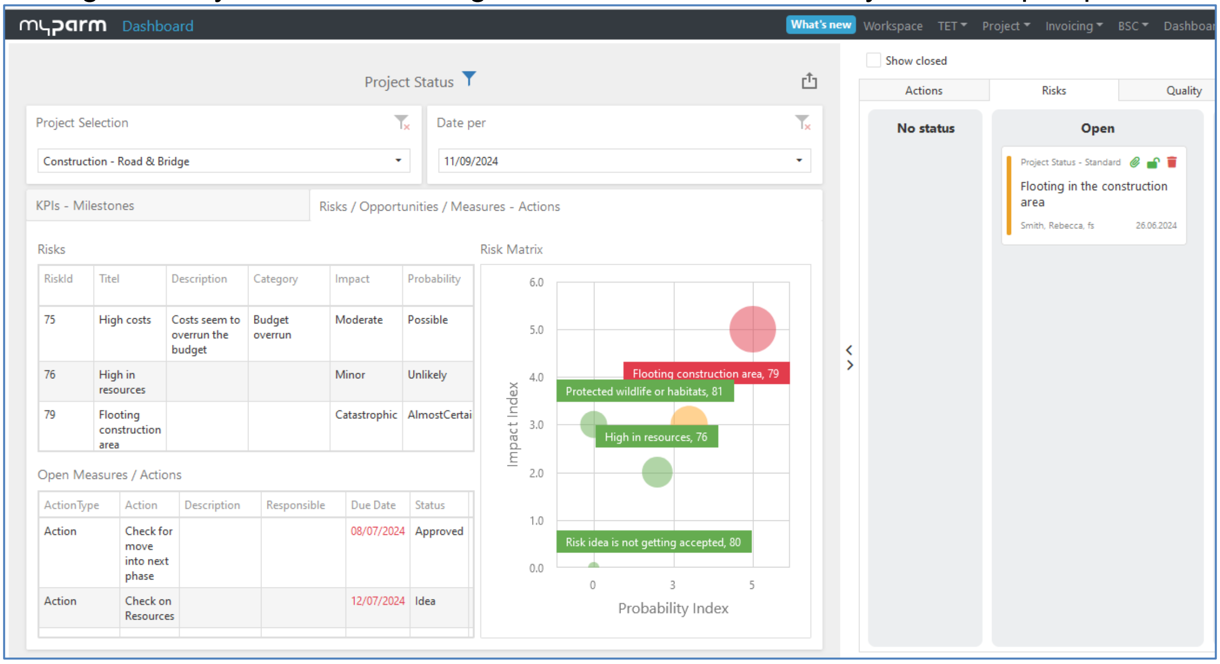
In addition to the project structure, risks can also be recorded directly from the MIS and dashboards. By analysing additional data in these areas, the task management feature can be used to identify and document risks.



In the standard "Project Status" dashboard, an overview is provided, which can be viewed by individual project:



From this view, actions can be managed directly from the risk tab of the task management system, or new insights can be recorded directly from this perspective.

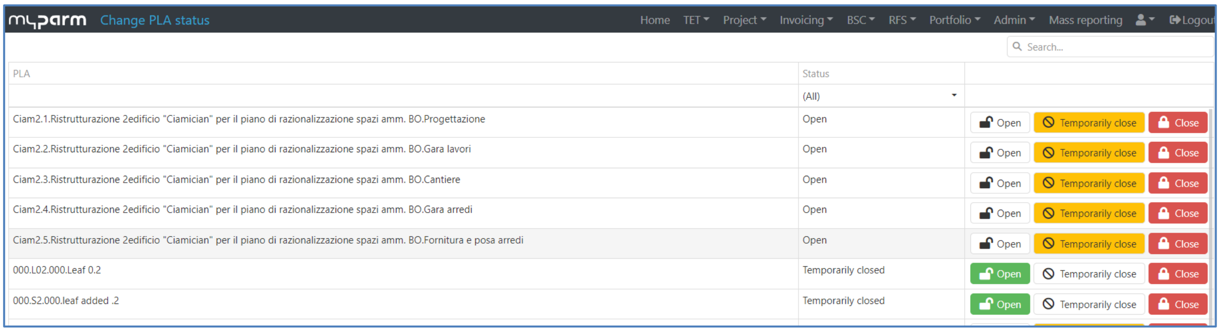


These additional views help maintain role-based perspectives. Specific risks and measures can be set and defined for risk managers and other designated user groups. In the dashboards presented above, all information is compiled and centrally viewed, with visualizations providing further support.

This ensures a comprehensive, company-wide risk management system. The user can organize data online with various functionalities (sorting, grouping, filtering) and export or print it as needed (e.g., export to Excel).

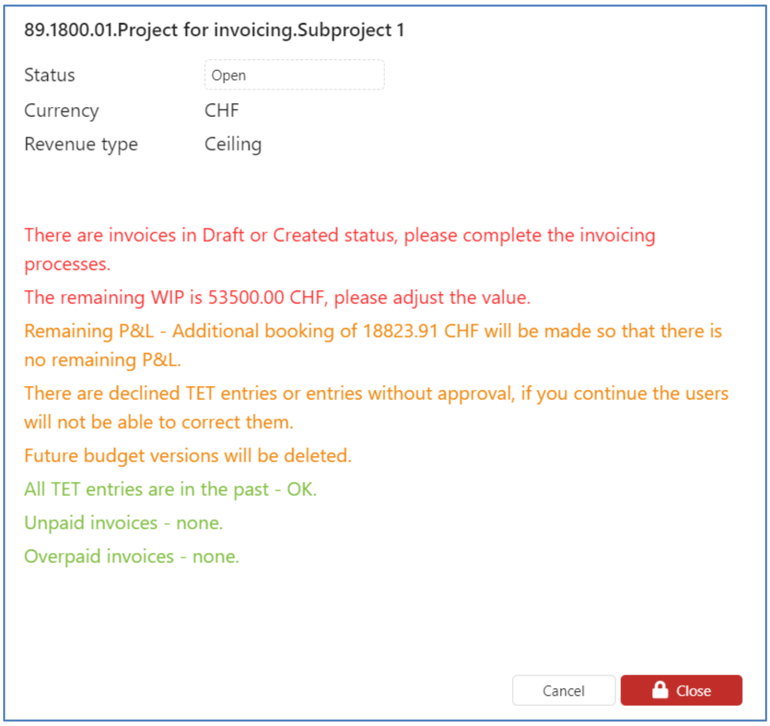
13. Change PLA status

Under Projects -> Change PLA status, a list is presented containing all PLAs that have not yet been definitively closed. White fields cannot be edited, green, yellow and red fields can be adjusted.
If a PLA is in a draft, it does not appear in this list (status not yet open) and can still be deleted. This is no longer possible in later statuses.



The following statuses must be distinguished:

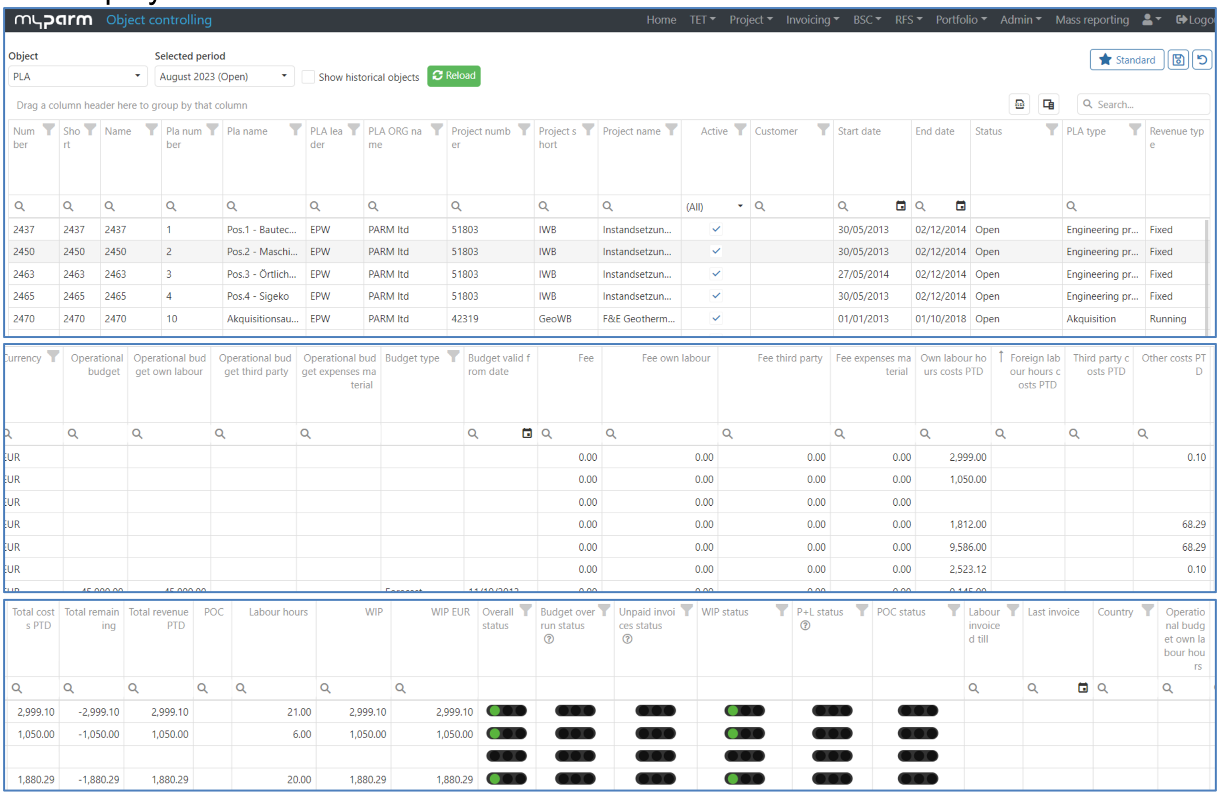
- Open: Hours can be recorded in an open PLA, invoices can be stored, etc. Accordingly, open PLAs can no longer be closed once they are open.
- Temporarily closed: Temporarily closed PLAs can also be set to open again. Only admins can make adjustments to temporarily closed PLAs.
- Close: It is possible to close an open PLA directly. If a PLA is permanently closed, it is removed from the list.
  Please note that the PLA end date must be in an open period. Otherwise it is not possible to post the remaining profit/loss, create the final budget and close the PLA.
  To close a PLA, the wizard appears again, reporting what still needs to be adjusted so that the PLA can be closed. The orange entries are warnings. The green entries are additional information. The PLA can only be definitively closed once actions have been carried out for the red entries.


89.1800.01.Project for invoicing.Subproject 1
Status
Open
Currency
CHF
Revenue type
Ceiling
There are invoices in Draft or Created status, please complete the invoicing processes.
The remaining WIP is 53500.00 CHF, please adjust the value.
Remaining P&L - Additional booking of 18823.91 CHF will be made so that there is no remaining P&L.
There are declined TET entries or entries without approval, if you continue the users will not be able to correct them.
Future budget versions will be deleted.
All TET entries are in the past - OK.
Unpaid invoices - none.
Overpaid invoices - none.
Cancel
Close

14. MIS (Management Information System)

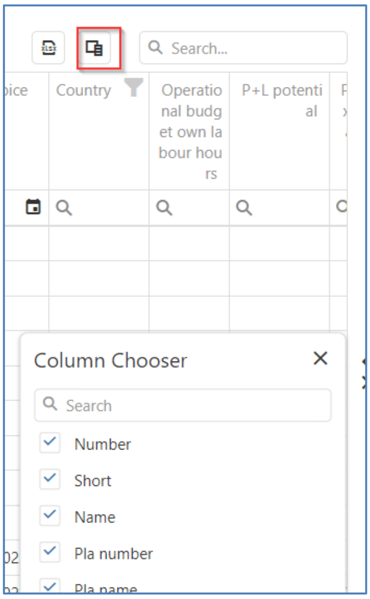
In the MIS, the project manager sees all his projects displayed with all the important information.
This is all the information about the project/PLA such as number, abbreviation, start and end date, revenue type, currency, customer, etc. Then come the figures for the currently valid budget, fees, costs for internal services, external services, and expenses from the start of the project to the selected period for the display. Total turnover, start date, P&L already booked, date of the last invoice and much more are made available to the project manager.

The user first chooses the object he wants to see or is allowed to see, then the period is chosen. Objects are cockpits that are already predefined. Additional cockpits can also be built to order. By pressing the 'Reload' button, the required data is processed and displayed.

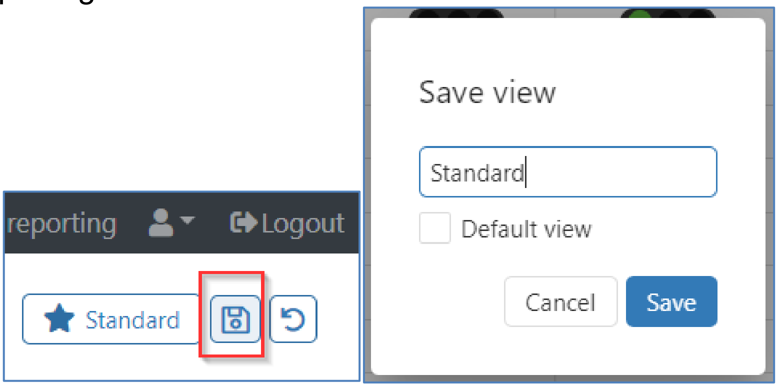


14.1 General handling

Columns can be moved, formulas can be set, grouped, searched for, and sorted in ascending and descending order. Columns can be hidden that the project manager does not want to see. The displayed data can be exported to Excel (icon on the left). The icon on the right opens a list of all available columns. The project manager can hide the columns that he does not want to see.



Each user can put together a view for themselves and then save it.

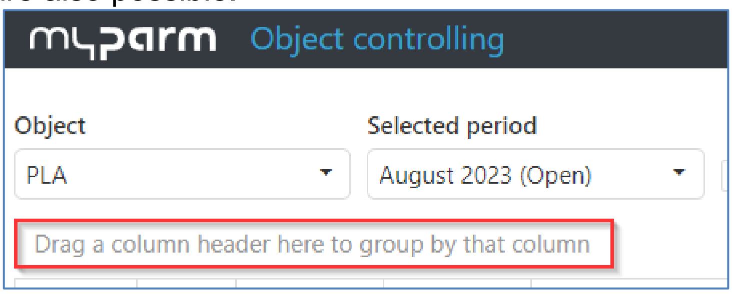


If the new view is always to be opened directly, check the "Default view" box.

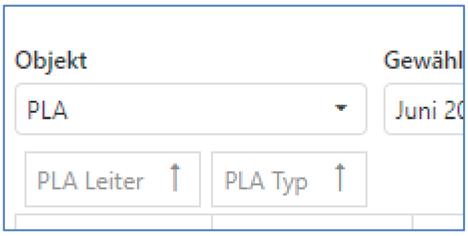
If you click on the field with the asterisk, all available views are shown.

The standard view is always present and can be accessed at any time.

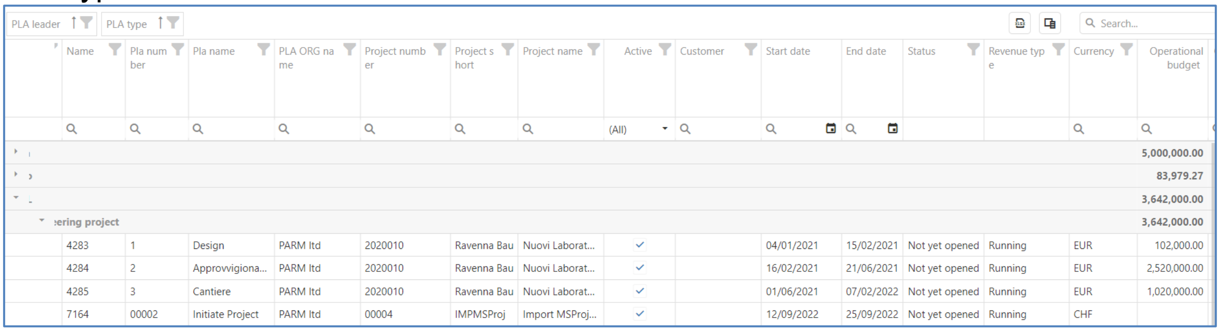
Filters can be set in individual columns. I want to see this and that in column A and not that. Groupings are also possible.



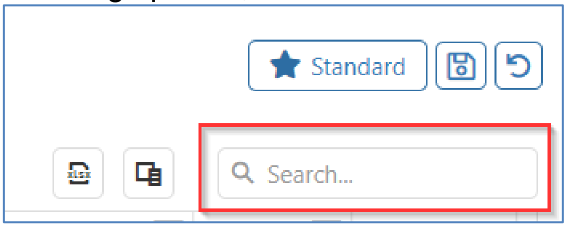
It can also be grouped by several columns at the same time.



First comes the PLA leader and then the PLA type. Total per employee and then the PLA type.



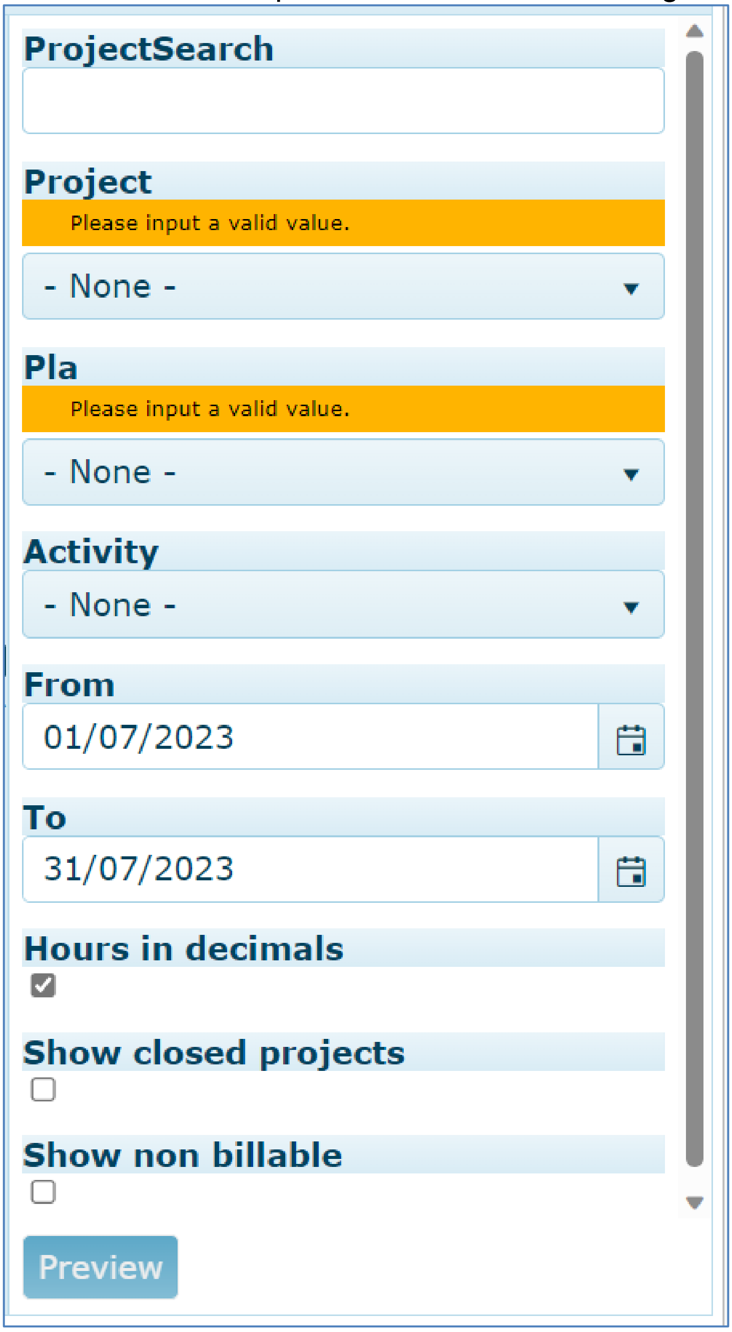
If you are looking for something specific, enter it in the search field.



15. Reports

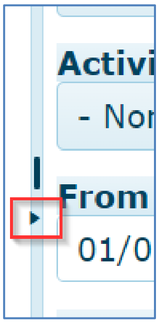
15.1 Default Reports

Depending on the selection of the reports, there are the following filters:



The first field is a full-text search. The projects that match the search are displayed below. PLAs of the defined project are listed and then the activities, if any. From – To is the last completed month by default.
Hours are shown in decimals. If the tick is removed, it is hours and minutes.
By default, closed projects are not displayed. However, this can be done if desired (check the appropriate box). You can choose whether to display non-billable hours/expenses.

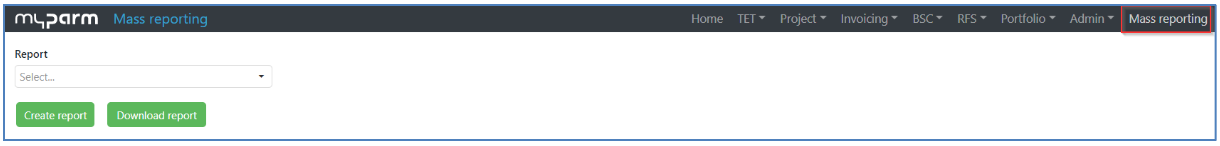
If the report is created but should be displayed on the whole page, press the small arrow to the left of the filters. The entire report is then displayed, and the small arrow moves to the right edge of the screen. Pressing it again moves it back to the left of the filters.



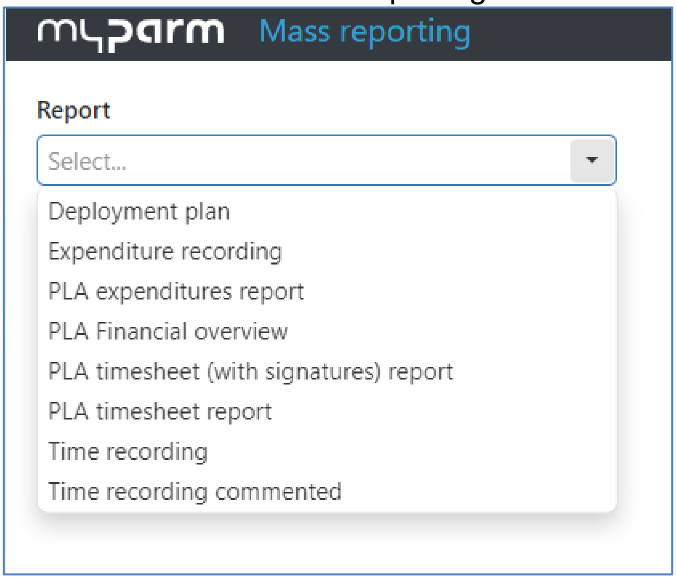
With this report creation function, one report after the other can now be generated and printed.

15.2 Mass Reporting

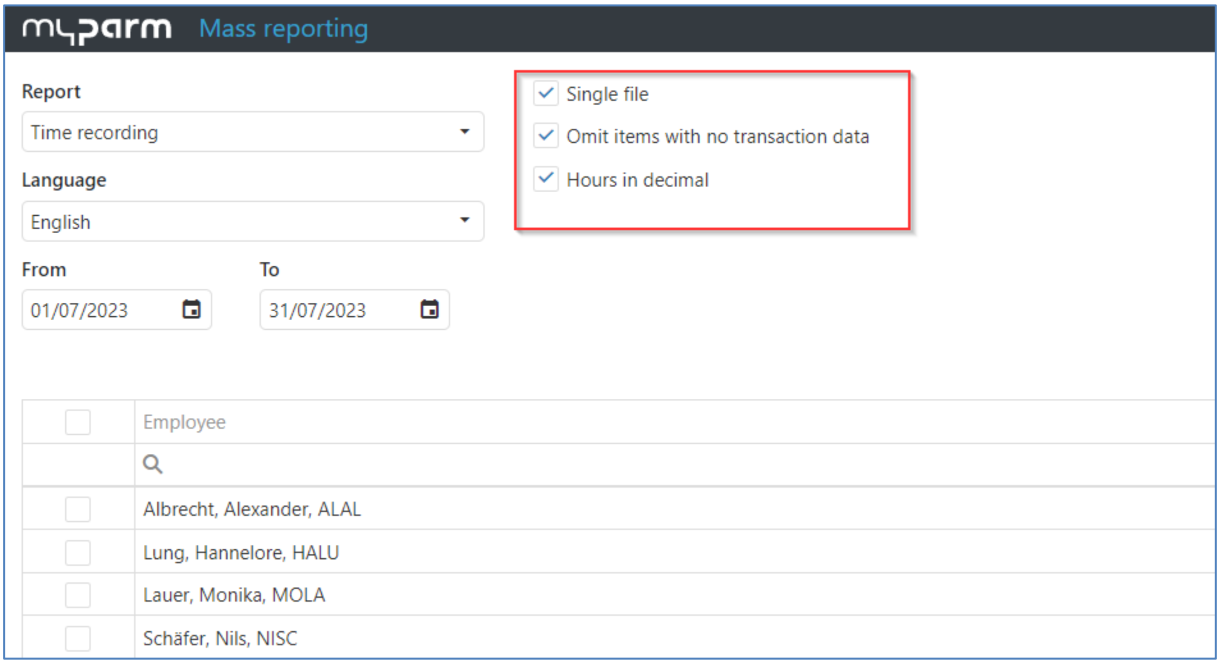
The mass reporting selection is on the right. Several reports can be printed here at the same time, which are then stored in a file.



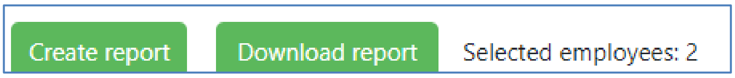
The following reports are available in Mass Reporting:



Depending on the selection of the report, the predefined settings also change. By default, the last month is always displayed in the time selection:



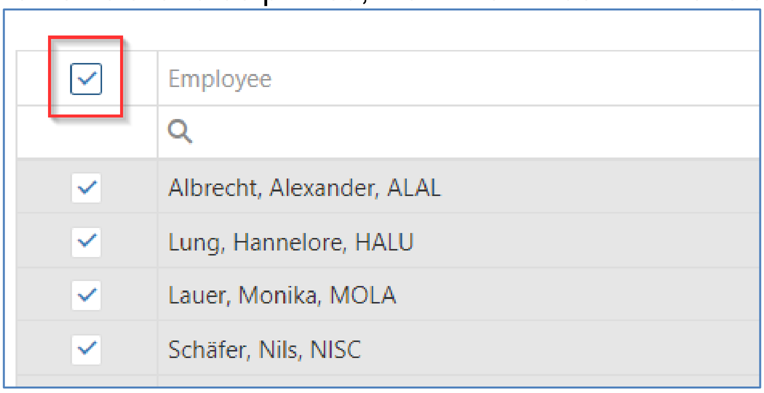
The command for creating the report is on the bottom left. Next to it is displayed how many employees were selected:



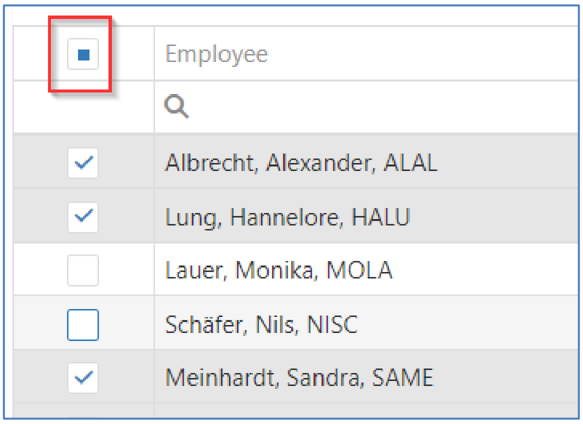
Employees can be marked directly from the list and/or via the search function.

If the desired employees are marked for the Timesheet report and the expense report is to be created for the same selection, this is simply selected in the 'Report' selection box. The previous selection remains.
The same function also applies to all PLA reports, where the desired projects are marked.

If all displayed elements are to be printed, mark the window in the totals line:

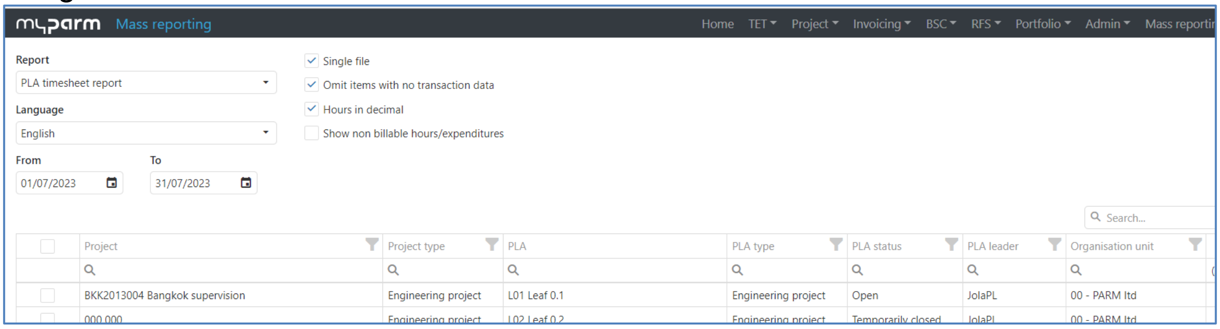


If only a few elements are marked, the window in the total line looks like this:

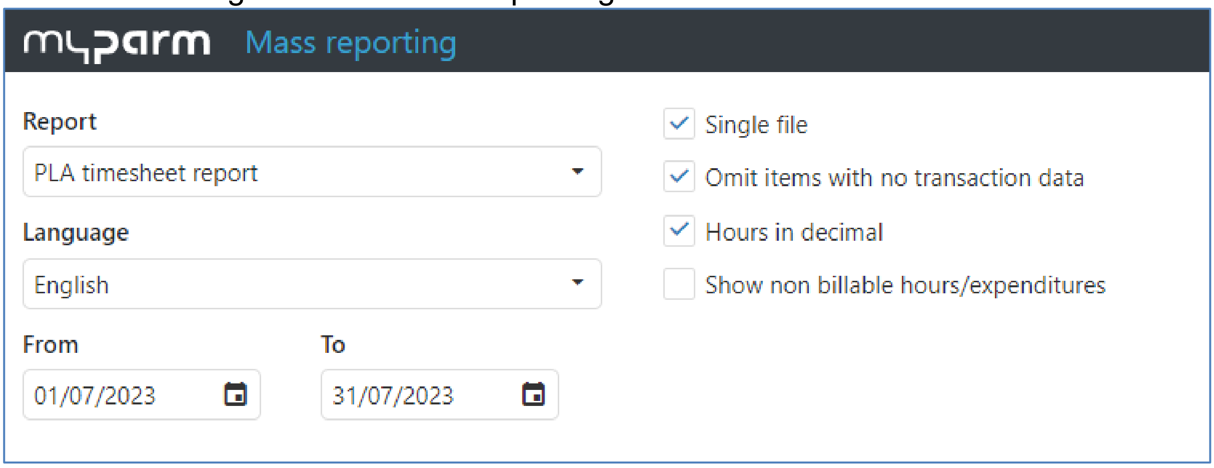


If you want to cancel the previous selection, press twice on the window in the total line. The first time all will be checked and the second time all will be unchecked.

The already known filter and search options are available for the selection of projects, by project, project type, PLA, PLA type, PLA status, PLA leader or by organizational assignment:



Additional settings can be made for printing.



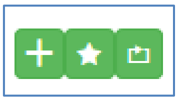
1. Output to a file. A file is generated that contains all the reports created.
2. Do not generate reports if no data is available. If there are no entries from employees or on a project for the selected period, no report will be created.
3. Hours in decimals. You can choose between hours in decimals or in hours and minutes.
4. Non-Billable Hours/Expenses. If these are also to be displayed, these entries are marked with an asterisk in the report.

16. TET – Timesheet, Expenses & Travel

The abbreviation TET stands for the acronym for Timesheet, Expenses & Travel. Here, time and expenses can be recorded and, depending on the client-specific configuration, approved.

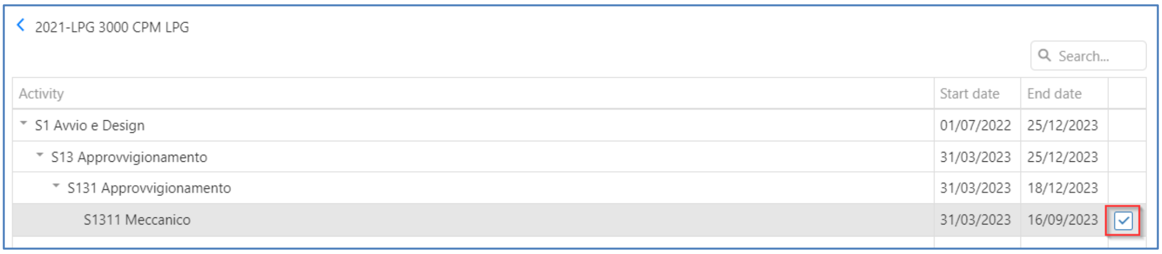
16.1 Enter time & expenses

With the green plus button, new projects / activities are added. Clicking the star will add all favorites and the icon on the far right will show the most recently used projects/activities.



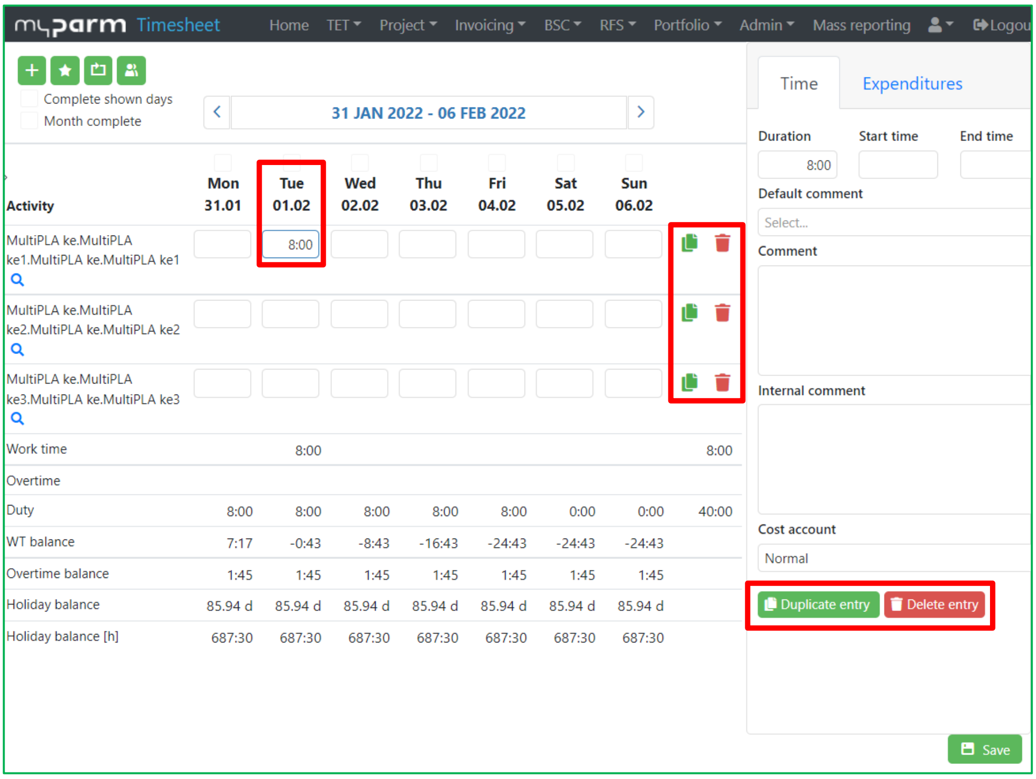
To add a new project or activity, click the green plus button to open a new window.

In this window, you can search for projects by name or abbreviation, or navigate through pages using the page numbers until you find the desired project.
Once you click on the project, the project structure, including its activities, will appear.



Select the desired activity(ies) by clicking on them with the mouse, and then transfer them to the timesheet by clicking the “Select” button (green button at the bottom right).

If you click the green "Copy" icon or the red "Delete" icon, the entire row will be copied or deleted, including time entered. No specific selection within the row is required for this action.



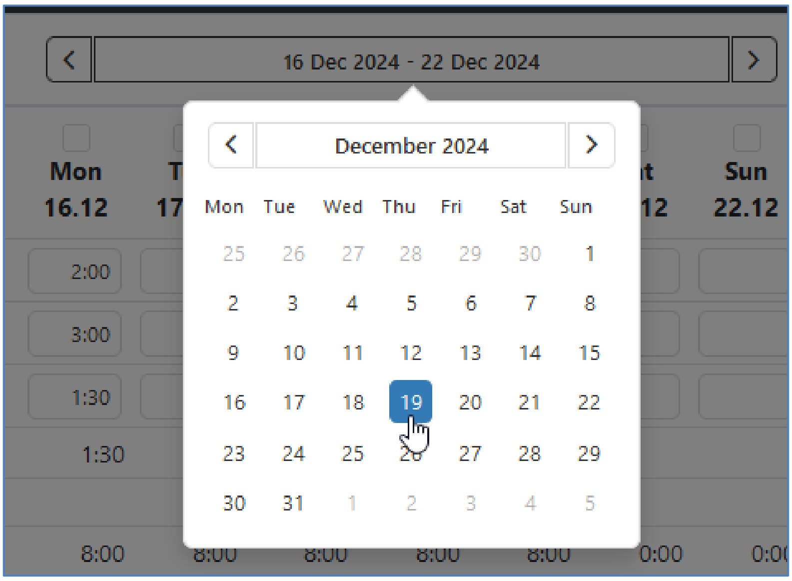
When the activity was selected and added you can also choose "Copy entry" or "Delete entry." Only the selected entry within the cell will then be copied or deleted or the whole line.

In TET, users can always view their current (cumulative) balances:

- **Work time:** Total hours recorded
- **Recorded working hours:** Hours that count towards Duty
- **Duty:** Required working hours per day
- **WT balance:** The accumulated working time balance
- **Holiday balance [hours]:** Remaining vacation days, displayed in hours.

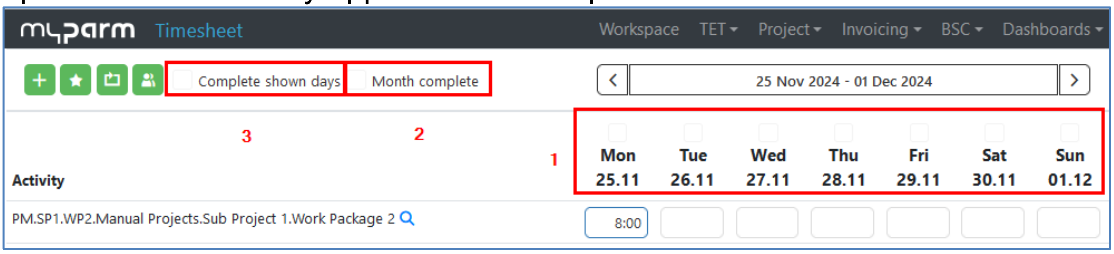
Navigate by Weeks

Use the right or left arrow to navigate forward or backward by week. Alternatively, you can click directly in the date field to open a calendar. Select the desired day, and the timesheet will jump to the corresponding week.



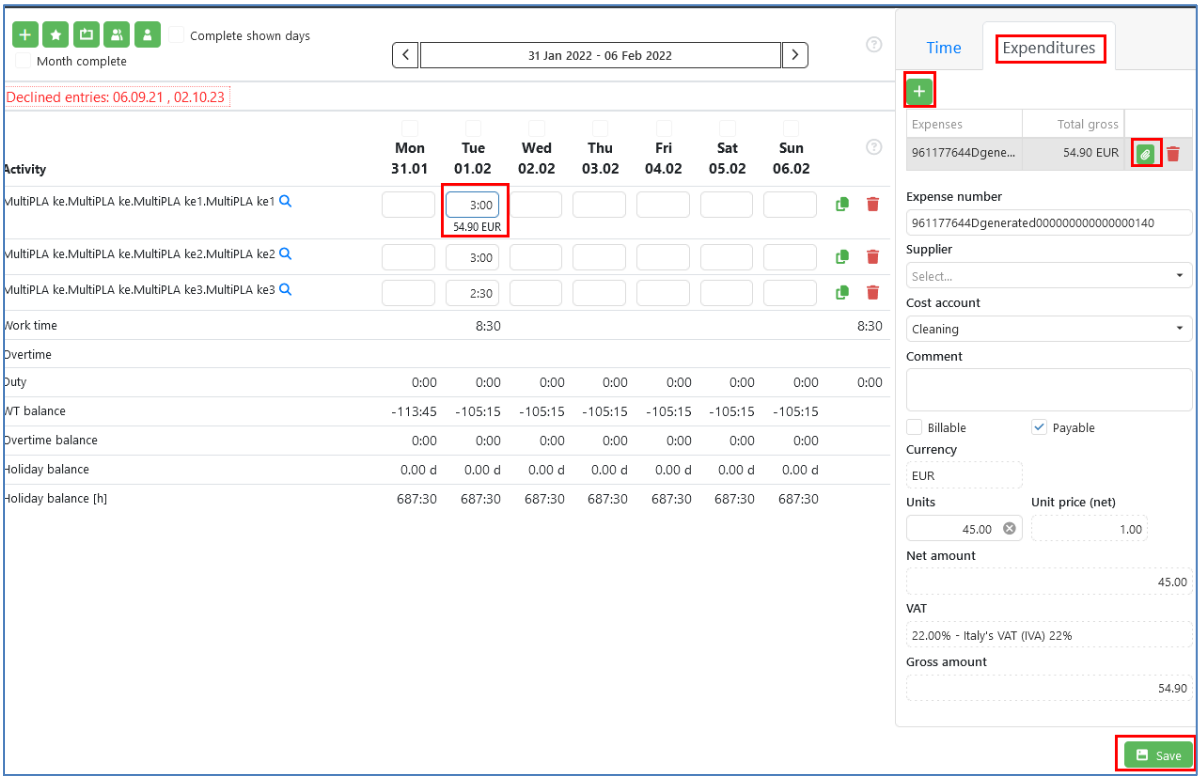
User Approval - Day, Week, Month

To confirm the completeness of entries, the user can tick the relevant boxes for individual days (1), the displayed week (2), or the entire month (3). The "Month Complete" button will only appear if a week spans two different months.



Expenses for an Existing Time Entry

To add an expense for an existing time entry, click the green plus sign to open a receipt form, which you then need to fill out. You can also attach the original receipt as a PDF using the designated icon on the right side.

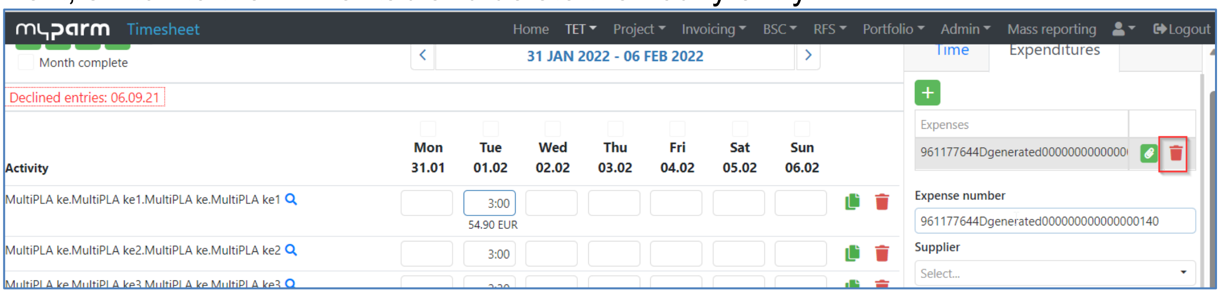


Once the expense entry is saved, an expense number is generated, and the entry will appear directly below the time entry.

The "Save" button is located at the bottom right and remains visible even when scrolling through a long list of activities.

Deleting an Existing Hour Entry with Expenses

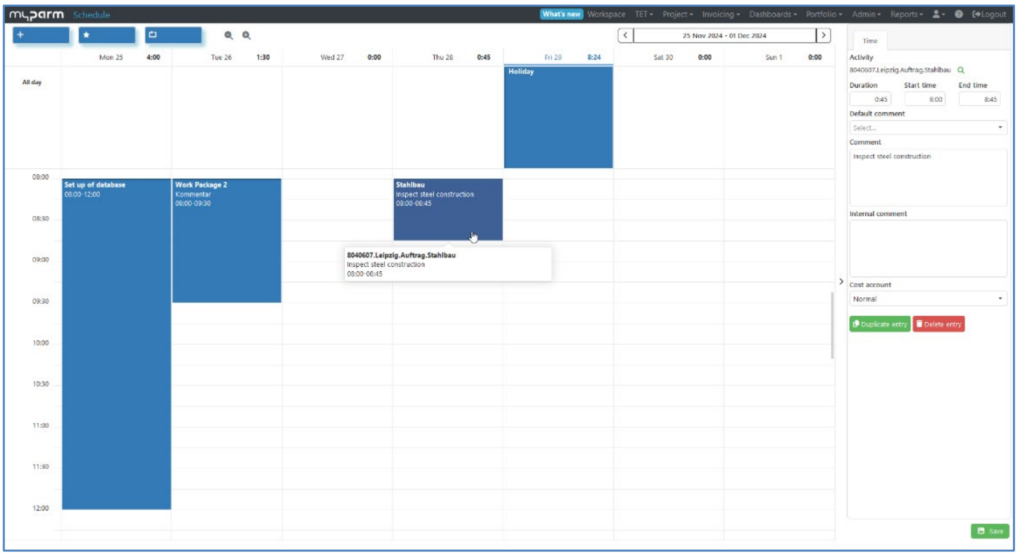
To delete an hour entry that has associated expenses, first go to the corresponding field in TET and select the "Expenses" tab. Delete the expense entry by clicking the red trash can icon; the expense entry will now be removed.
Next, switch to the "Time" tab and delete the hourly entry.



16.2 Schedule

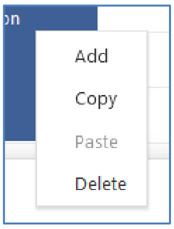
If you prefer entering your time with drag-and-drop functionality in a calendar view, you can do this within the schedule. Our schedule view allows you to use the plus button or select from recently used activities and simply drag them directly into the calendar. A pop-up window then opens, displaying project activities for quick selection, making time entry even more intuitive.

You can place the activity either for the whole day or within the timetable. Adapt the hours spent on the activity by entering the value in the right details or using the error to extend the time or move the activity to a completely different day and time.

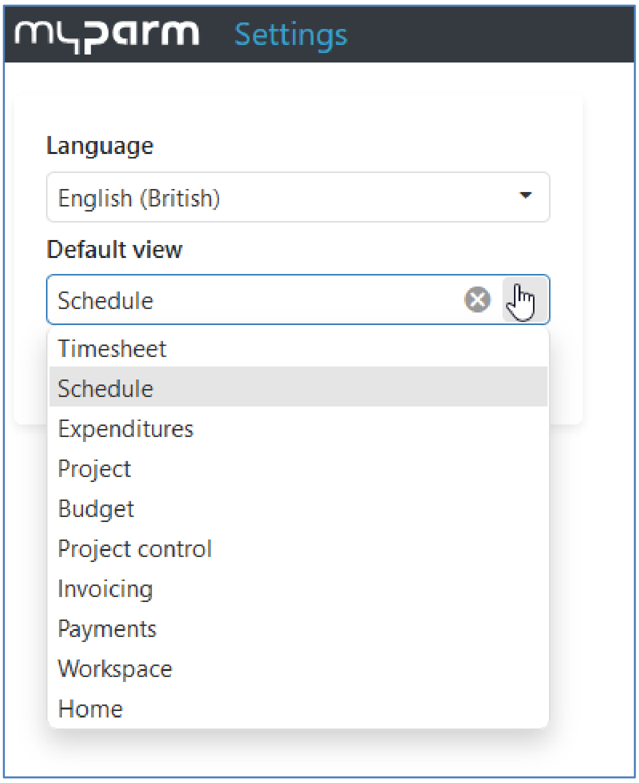


To each entry we show only the most relevant information, while a tooltip reveals additional details, including the associated project and any comments added:

The commands for add and paste are accessible via the right-click menu. Right-click on a day and select "Add" to open a list of available projects, PLAs, and activities, from which you can choose the desired item. Existing entries can be copied and pasted to a different location as needed.



This schedule view can be set as the default for all users upon login or can be selected manually in each user's profile settings, allowing for a customized experience:

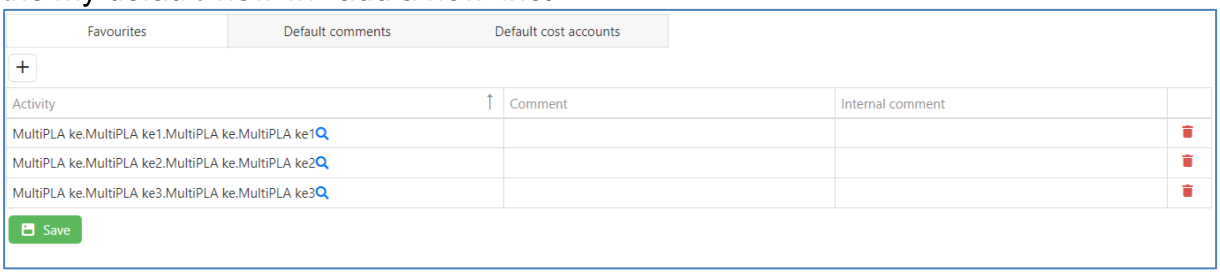


16.3 My Defaults

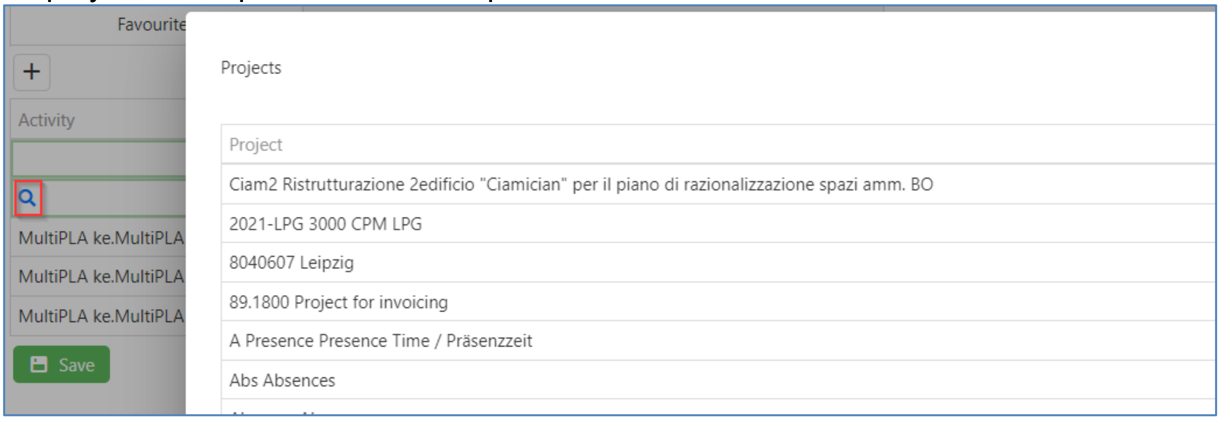
Within my defaults the user has the possibility to set favourites, comments and cost accounts. In the timesheet view favourites can used from the star symbol while comment and cost accounts will be prefilled like defined.

Favourites

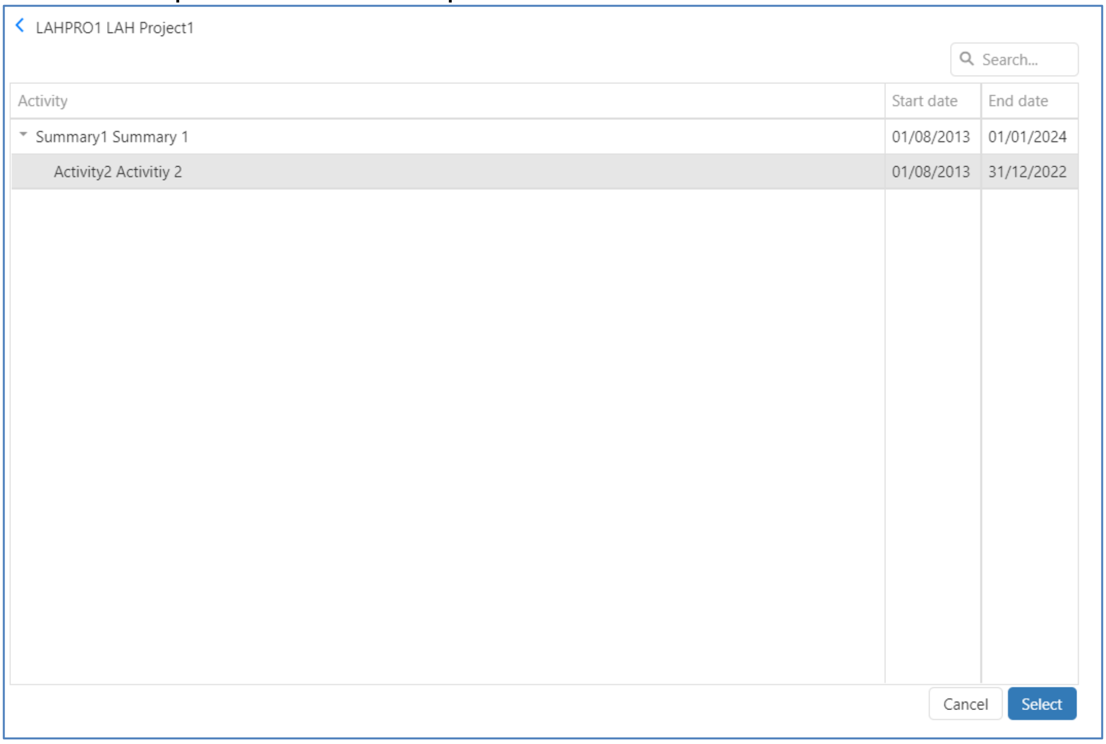
Employees can define favorites within my defaults or directly in the timesheet. Project activities on which they regularly report hours can be marked with the star directly in the timesheet and will be automatically added in favourites. Pressing the plus within the my default view will add a new line.



By clicking the plus sign you get an empty line. Now you can click on the magnifying glass in the "Activity" field and a window opens and displays all available projects. If you click on a project, the corresponding activities are displayed for which the employee can report hours and expenses.

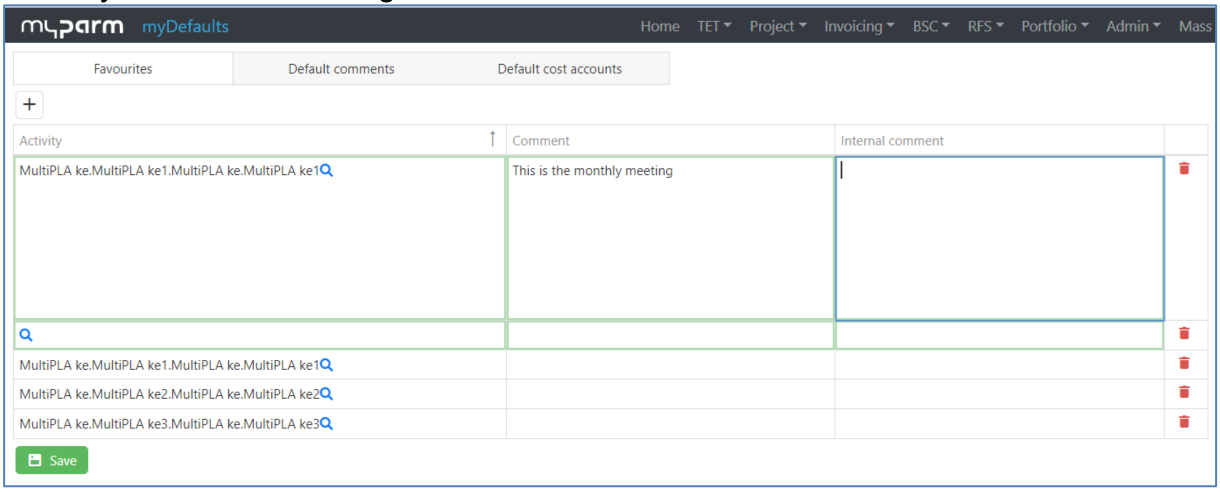


The desired activity is marked and transferred to the favorites list with the "Select" command. Multiple selection is not possible.



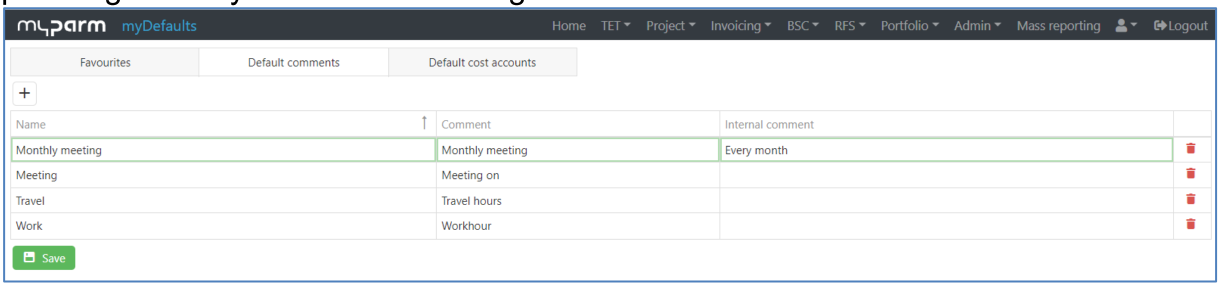
By right clicking the magnifying glass from an already added PLA in the "Activity" field, the window opens and displays the path of added project. You can change the activity/project by moving by the arrow.

The favourite entry can now be supplemented with a comment and an internal comment. The action is completed with "Save". The entry can be deleted by clicking the recycle bin on the far right of the line.



Default comments

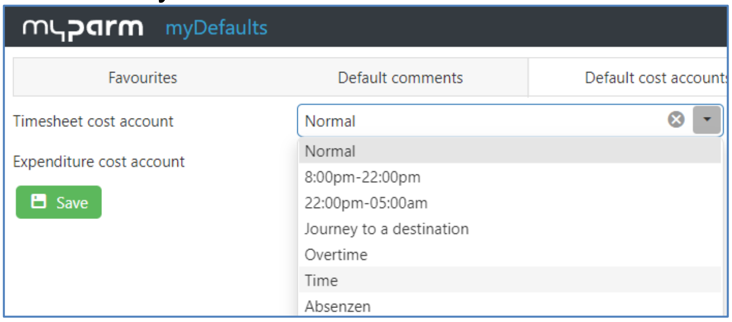
If you click the black plus sign, a new line is created. The default comment gets a name, the desired comment and the internal comment. The internal comment is only visible for the user. The action is completed by saving. The entry can be deleted by pressing the recycle bin on the far right of the line.



The name of the comment will be visible in the timesheet and can be choose from in a dropdown menu.

Default cost accounts

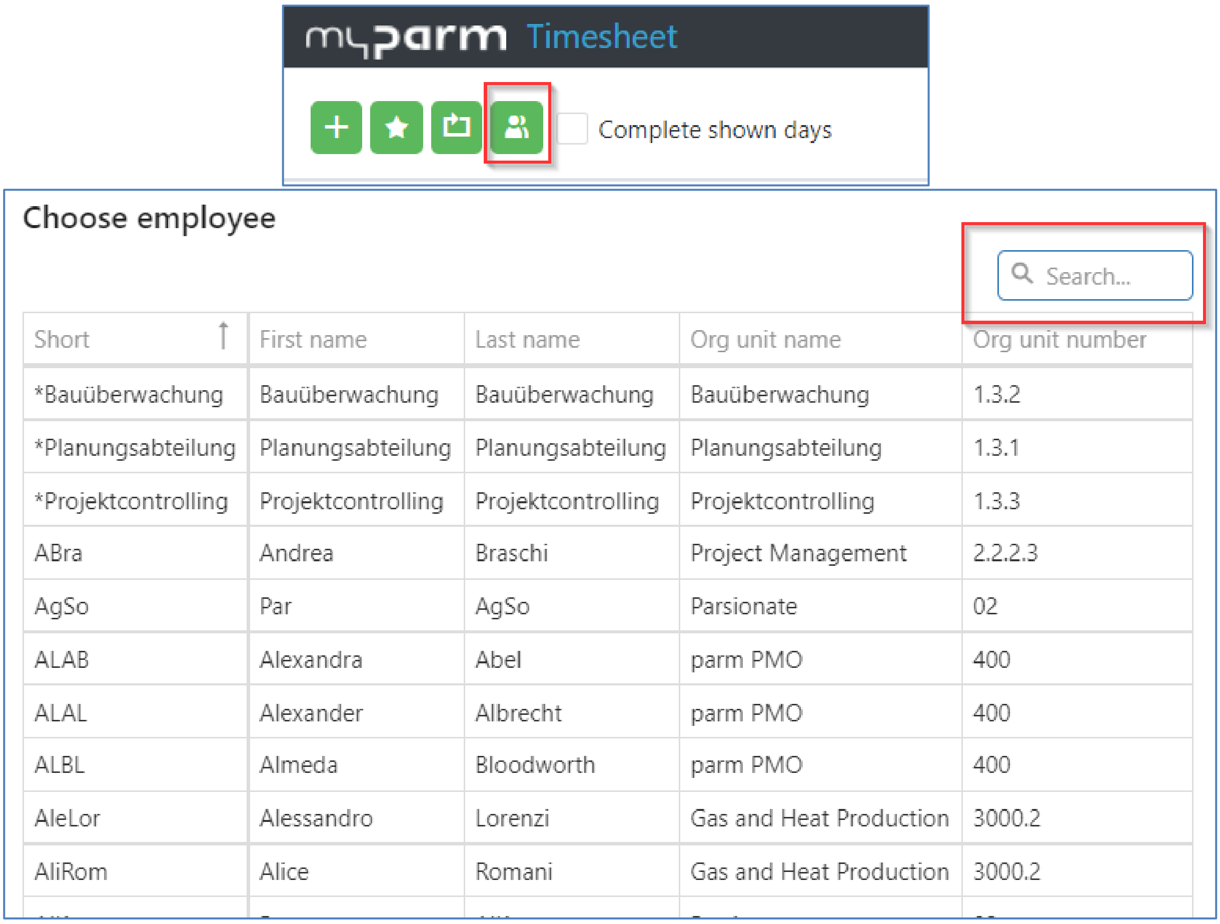
Each timesheet entry must include a cost account. All defined cost account types are available for selection, such as “working hours” or “holidays.” To streamline entries, “working hours” can be set as a default, eliminating the need for employees to select a cost account for each entry.



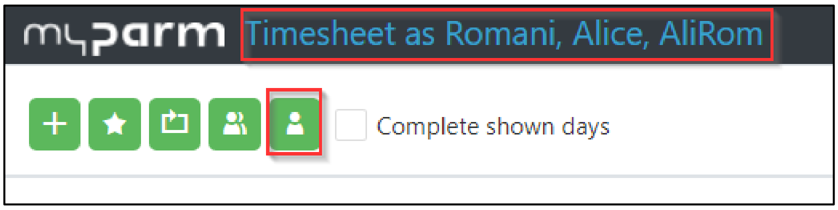
If an activity is chosen that does not have a default hour type, the employee’s default cost account will automatically apply.
The same process applies to expense accounts. However, since expense accounts typically differ, there might be no direct need in setting a default cost account.

16.4 TET-Admin and TET-Manager - enter hours and expenses for other users

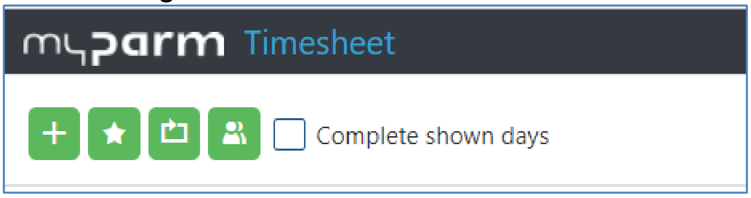
When the user clicks this icon, a pop-up window opens, allowing them to search for the desired employee by either scrolling through the list or entering a name in the search field.



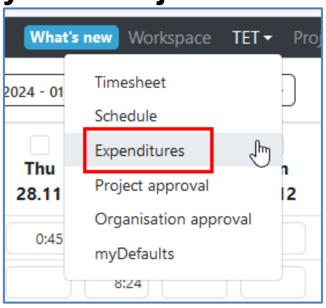
Clicking "Select" will then open the timesheet for the chosen user. Both TET-Admin and TET-Manager have access to the same functionalities as the selected user.



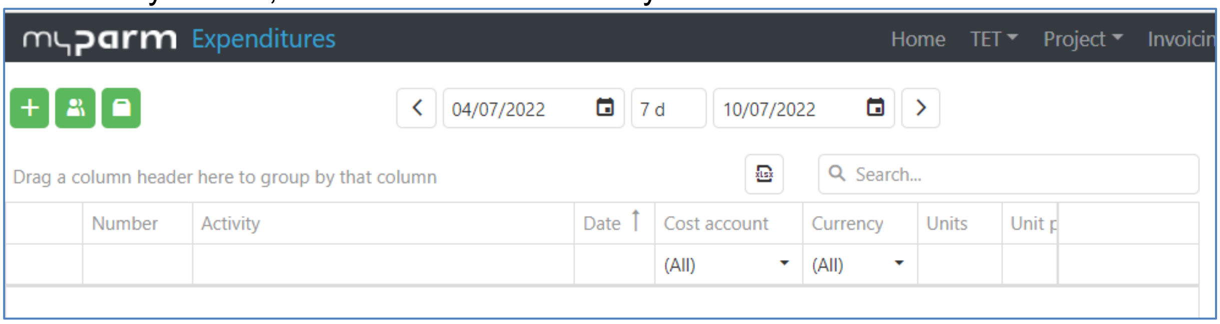
Recording more than 24 hours is restricted to administrators and can only be done for other employees. To do this, the administrator selects the icon with multiple people and chooses the relevant employee. If the administrator needs to record more than 24 hours for themselves, they must also select their name from this list.
Additionally, a fifth icon (a single person) becomes active, labelled "Switching to myself." The logged-in user can click this icon to return to their own timesheet, which will display with the following title:



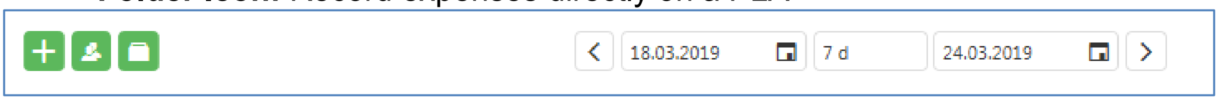
16.5 Expense Entry Directly on a Project



Here, expenses can be recorded for yourself, for other employees or directly on a PLA/activity. Expenses are displayed by week, and the user can adjust the display as needed. By default, the view shows seven days.

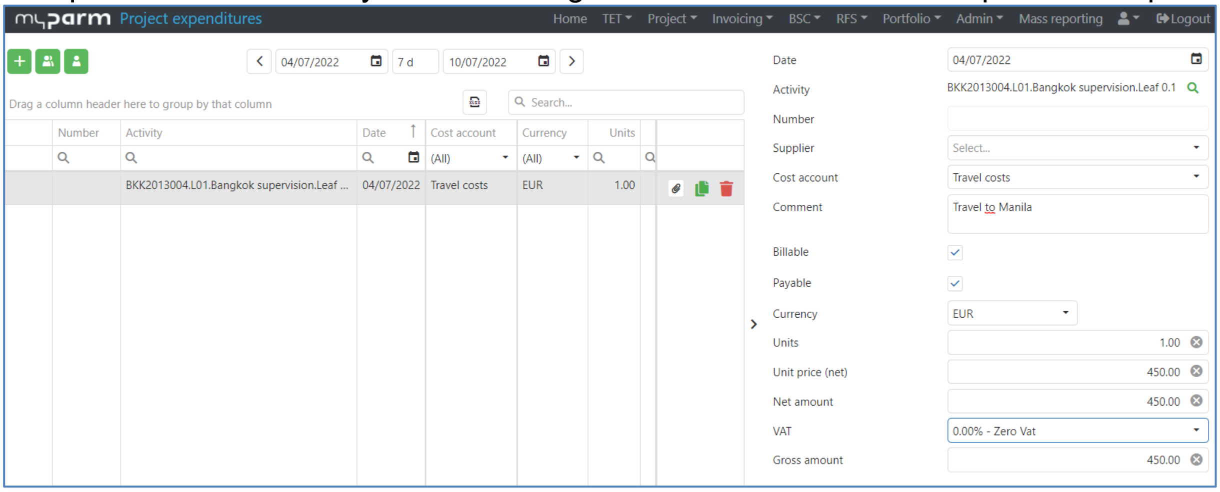


- **Green Plus:** Record expenses for yourself
- **People Icon:** Record expenses for other users
- **Folder Icon:** Record expenses directly on a PLA

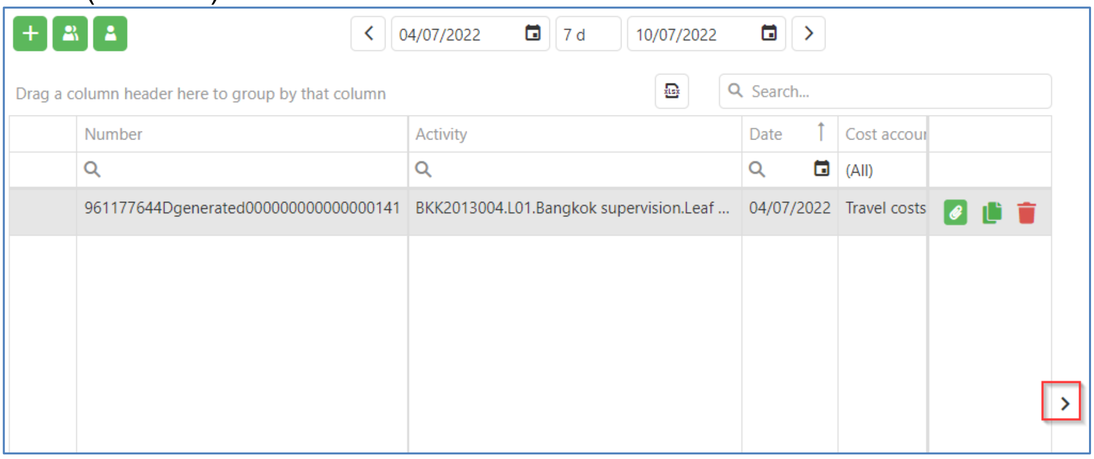


To record expenses for a project, select the folder icon on the far right. Then, click the green plus sign. A search window will open where you can locate the desired PLA. On the right side of the window, complete the entry form. The selected PLA and the start date of the chosen time span will automatically appear, but the date can be adjusted at any time.

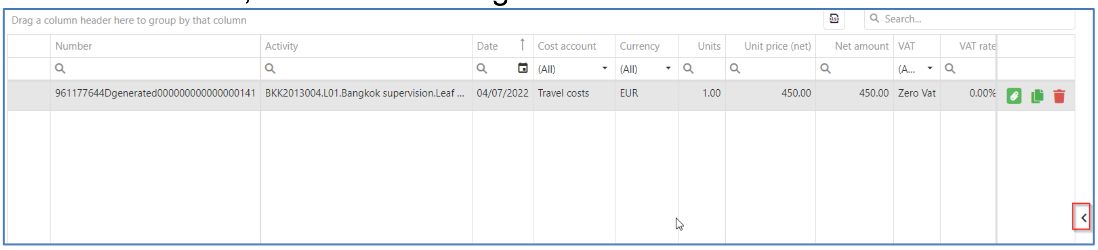
Complete each mandatory box according to the information on the expense receipt.



If a price is predefined for the selected expense type, it will be displayed automatically and cannot be modified. The same applies to VAT, as well as the "Billable" and "Payable" fields. For example, if an expense type is set as non-payable, the employee will not be able to check the box manually.
The entered values will also appear in the left pane. To view additional details, click the arrow (red icon).



To minimize the view, click the arrow again.



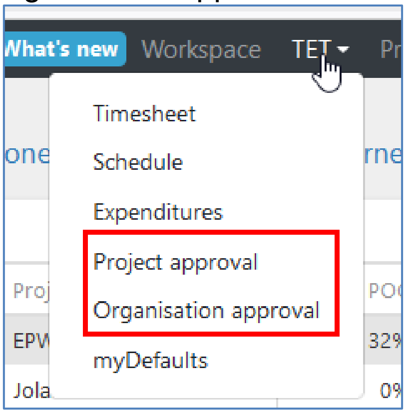
Entries can be edited by selecting the relevant line with the mouse. Once selected, changes can be made in the form on the right side. Clicking the green plus within a line will duplicate the existing entry. To delete an entry, click the red trash can icon.
An expense number will be assigned only after saving.

16.6 Registration of Negative Expenses by the Administrator

Negative expenses must be recorded for another user and cannot be entered for yourself. To do this, the administrator selects their own name from the list of employees.

16.7 Project & Organisation Approval

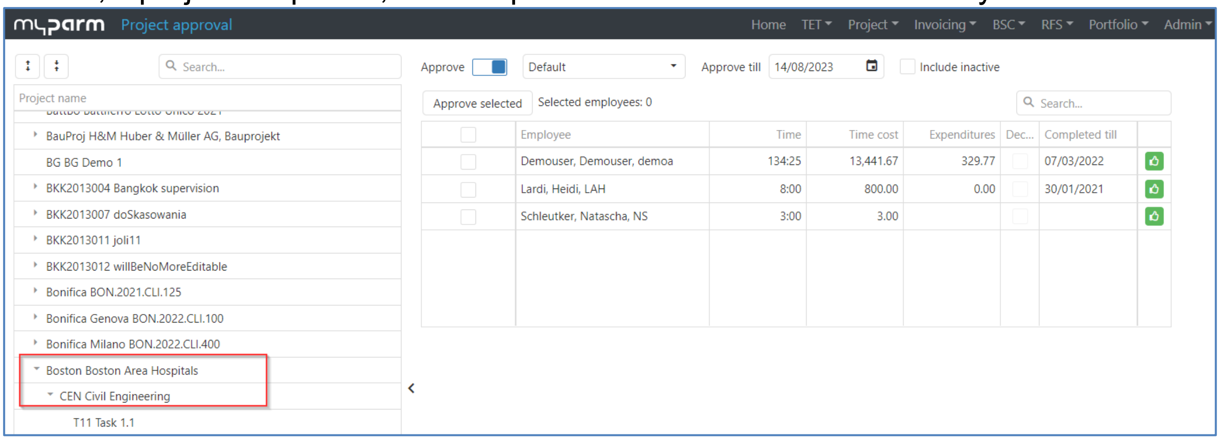
If approval processes are defined in myPARM for your company, specific roles are granted access to project & organisation approval for hours and expenses.



The project leader or organizational leader can approve or reject the hours and expenses reported by each employee working on projects.

Approve hours and expenses

In the left panel, the project/organisation manager can see all projects. To approve entries, a project is opened, and it is possible to drill down to the activity level if desired.



On the right side the employees are displayed, the hours written, their costs, the expenses, rejected and the "done by" date.

The top line on the right is the default settings.

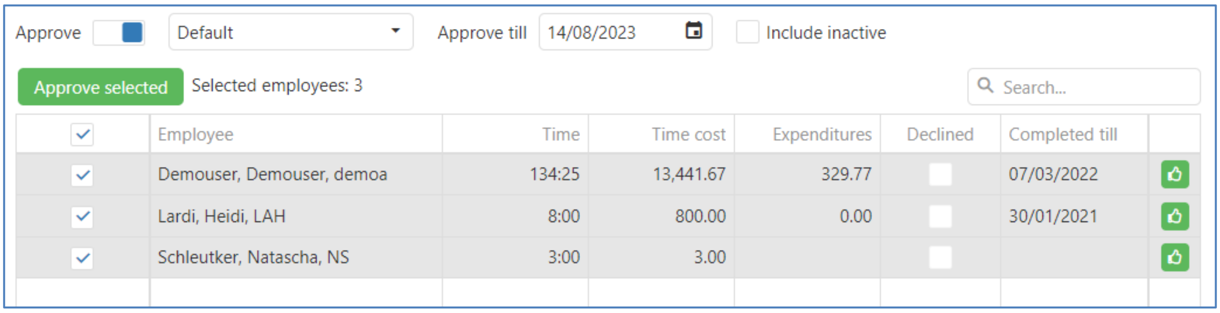
Approve: This option is displayed when the blue toggle is set to the right. If the blue toggle is dragged to the left using the mouse, it switches to **Unapprove**. Entries are approved or their approval is removed based on the selected option.

Using the dropdown menu, the user can select a period in the date field:

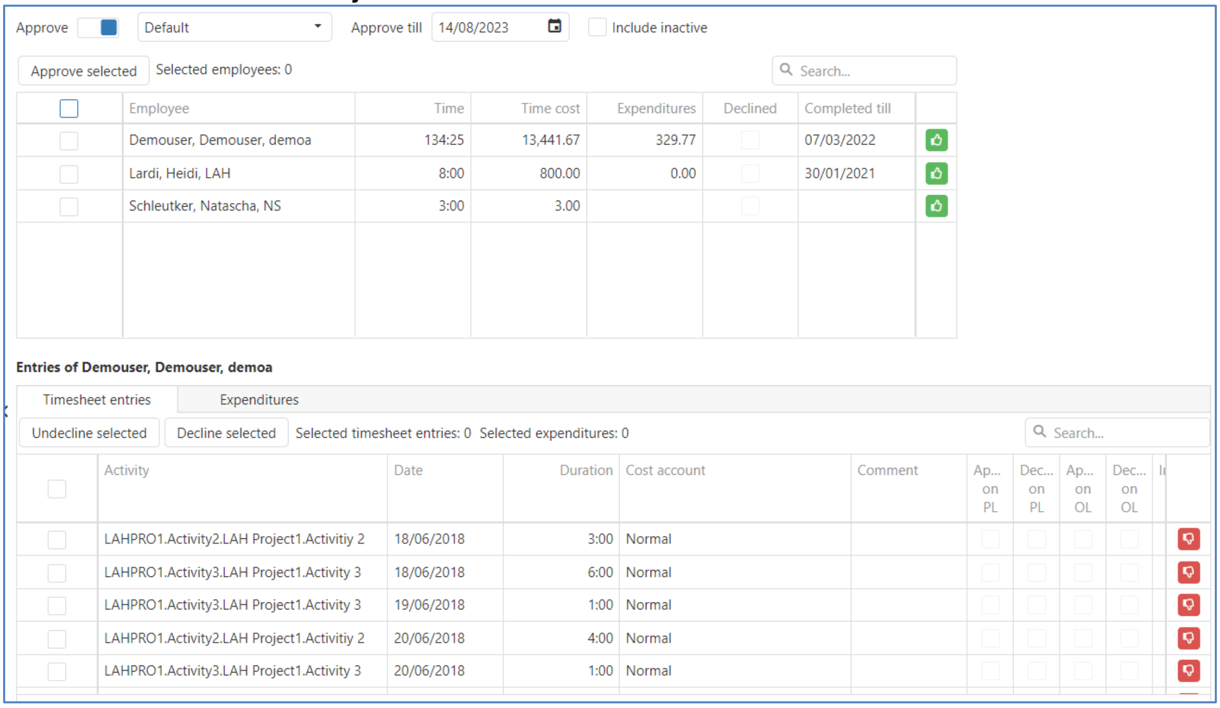
- **Default**: From the day after the last approved date up to today.
- **Last period:** From the last approved day of the previous month to the last day of that month.
- **Last year:** From the last approved day of the previous year to the last day of that year.

Approve until: The user can also manually enter the date up to which entries should be approved.
It is not necessary to select a "from" date. The system automatically compiles all unapproved entries up to the "Approve by" date and displays them in detail.
Include inactive: Entries for inactive employees are also included in the view.

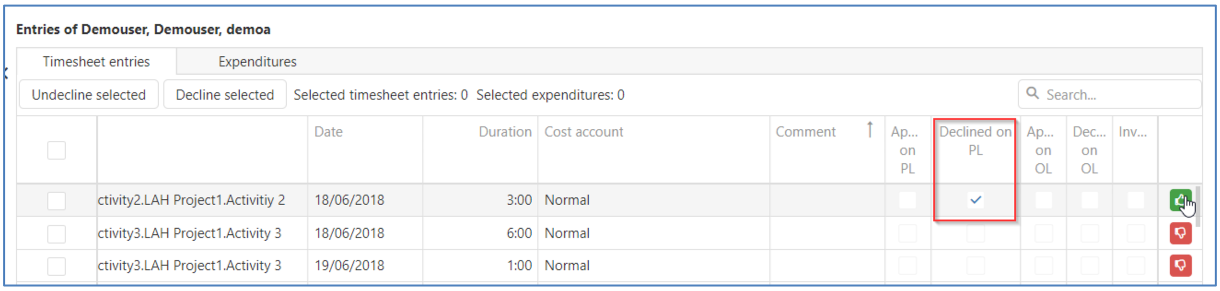
The project manager has the option to approve all logged hours for the selected project in a single step. On the left side, a checkbox can be selected for each employee. Once a selection is made, the **"Approve selected"** button turns green. Clicking this button approves the entries, and the corresponding employees and their entries disappear from the view.



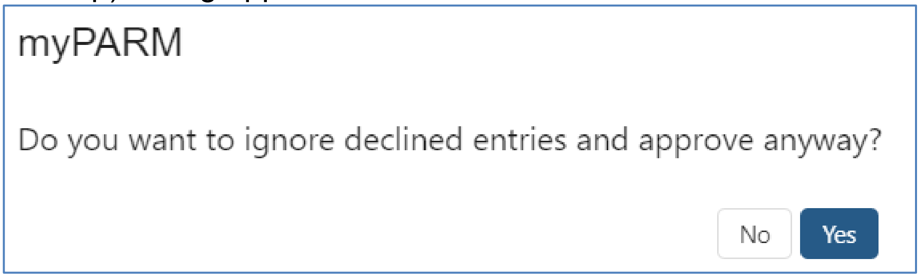
If the name of an employee is selected, the individual entries are displayed below. Here, it is possible to exclude specific entries from approval. Entries marked with a red thumbs-down icon are rejected.



If entries are rejected, this employee can no longer be approved in one step. This is indicated by the tick in the "Declined" column:



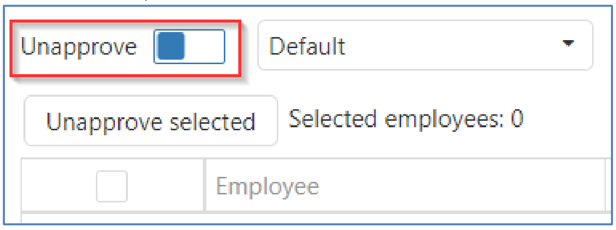
If individual entries are rejected, the following message is displayed on the total line (green thumbs-up) during approval:



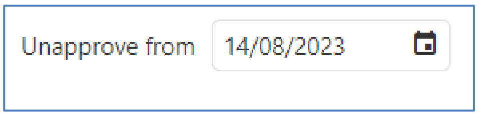
Here you can now determine whether the rejected entries should be approved after all.

Revoking approvals

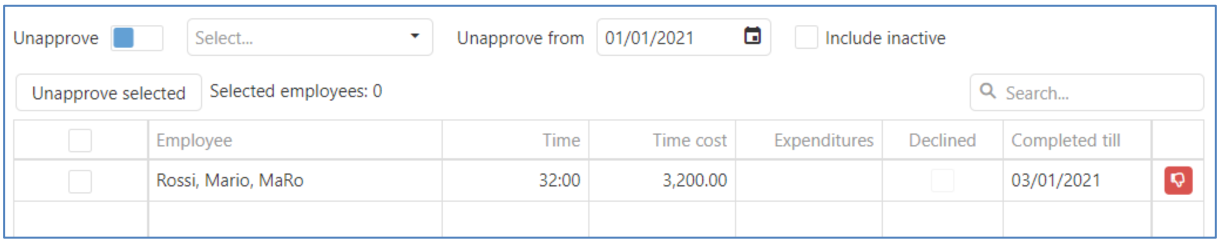
If the approval is to be revoked, the blue button is moved to the left:



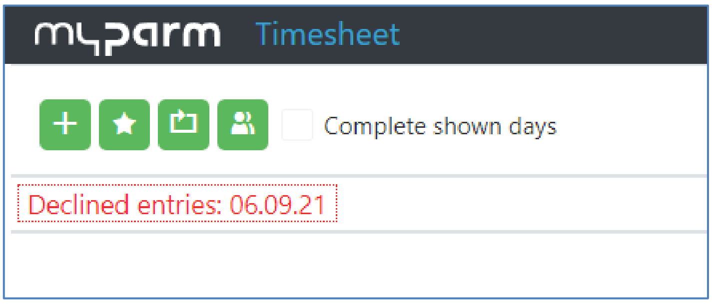
At the same time, the date must be redefined: From which point should the approval be revoked?



All employees whose hours were approved from 01/01/2021 onwards are displayed. To remove the approval from 01/01/2021 until today, select the respective employee in the window and click **"Unapprove selected"**.



The user sees the information about rejected entries displayed in the timesheet:



The OL approval process works exactly the same way.
On the left side, the approver sees their department, and on the right side, the employees.

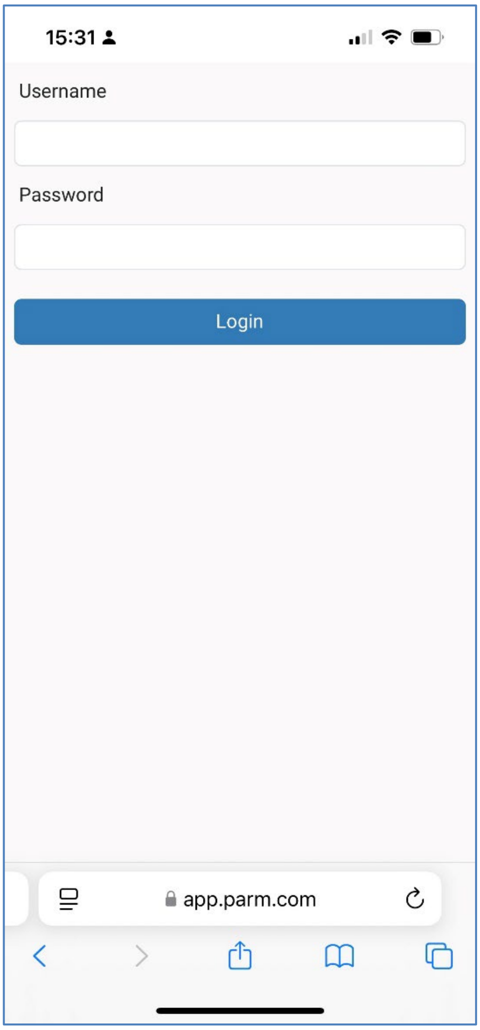
There is no "Save" button in the PL and OL approval processes. Changes are automatically saved based on the symbols clicked.

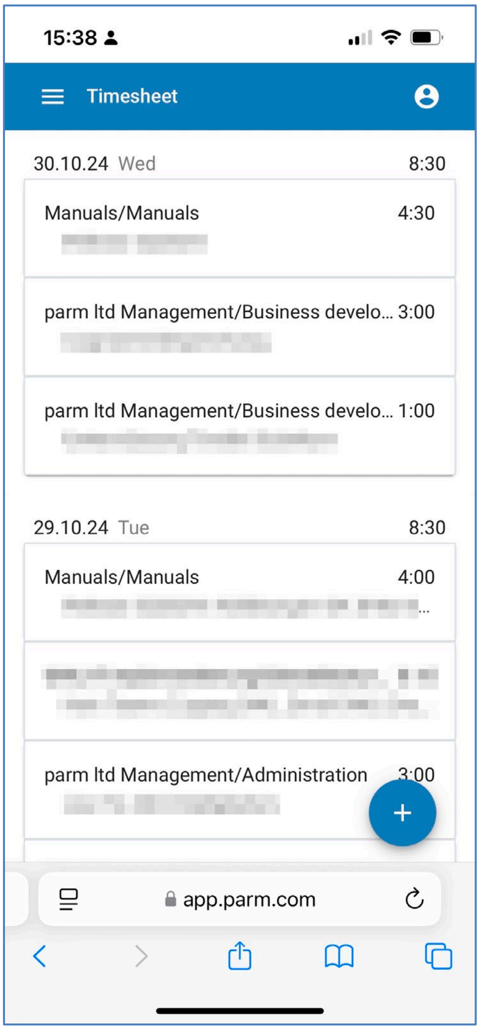
16.8 Mobile Timesheet

The mobile timesheet is available via Web URL for iOS and Android. Like this the daily timesheet entries are always up to date and meet current standards:

- **Flexible Time Entry:** Log your hours multiple times throughout the day as you complete tasks, keeping your timesheet accurate and up-to-date.
- **Enhanced Mobile Compatibility:** The timesheet now features a time picker, making mobile entries easier and more efficient.
- **Guided Input:** Easily navigate through selecting dates from the calendar, access recently used activities (from the last 30 days), and quickly complete all required fields.
- **Edit & Delete Options:** You can edit or delete entries made on the current day, keeping your time records accurate.
- **Read-Only View for Finalized Entries**: Previous entries that are no longer modifiable are available in a convenient read-only format.

Enhanced personalization is included with automatic culture settings, so timesheet formatting aligns with the settings saved in your user profile, synchronized from the web application. Only current and past entries are displayed, with future entries hidden for better focus.





The mobile timesheet is also organized for seamless navigation. When you access the timesheet, it defaults to showing entries from the current and last calendar week, neatly grouped by day. At the bottom, a “Load More” button allows you to view older data, ensuring you can easily find recent entries without extra scrolling.

To further enhance productivity, modern mobile features make time entry simpler than ever:

- **Comment with Speech-to-Text:** Quickly add comments by using voice recognition, saving you typing time.
- **Access Anytime, Anywhere:** Record time entries on the go, even during on-site visits.

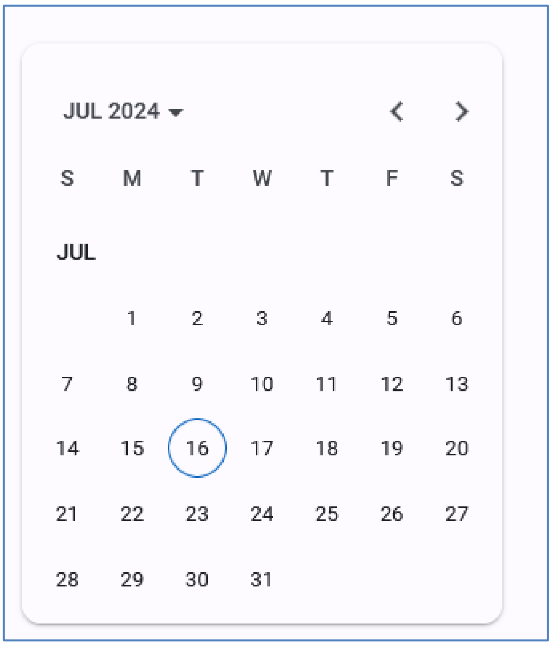
The mobile timesheet is accessible via a URL, so no separate app download is required. For quicker access, you can save the timesheet URL as a home screen icon on iOS or Android.

Enter time

The date picker allows users to select a date, with today’s date set as the default. The date selection is restricted to:

- The currently open period,
- Dates after any project manager-approved and completed dates, and
- Dates within the employee’s current employment periods.

Example: If an employee has two employment periods, 01.01.24 → 31.08.24 and 01.12.24 → open, then in the date picker we can choose only dates between 01.01.24 → 31.08.24 (but taking also into account the other limitations).



Once a date is selected, the user is redirected to the next screen to select an activity from recently used options (similar to when changing activities). After choosing an activity, the user is taken to the timesheet details page, where the chosen date and activity are prefilled.

- The activity can be changed if necessary.
- The date is not editable.
- Default duration is set to 30 minutes.
- Fields for comments and internal comments are available.

Cost account prefilling

The cost account field is prefilled by default based on the following priorities:

- The cost account assigned to the selected activity.
- The default cost account in the logged-in user's myDefaults.
- The default cost account set in the administrator settings

If none of these options provide a default cost account, the field remains blank, and the user is prompted to select one. Note that if the selected default cost account is inactive or not relevant, it will act as though no cost account was selected.

Upon saving the entry, the cost account is set server-side (not visible to the user) based on the following hierarchy:

1. Default cost account from the selected activity.
2. Default time cost account from the user's myDefaults.
3. Default cost account from the application settings.

If no valid cost account is available, a toast message will prompt the user to select one upon clicking the plus icon.

Read-Only

Entries become read-only when:

- They are invoiced, PL-approved, imported from a connected interface, marked as corrections (e.g. over 24-hour values), or contain negative values (blocked for display).
- The entry's date is completed by the user, approved by the project manager, or within a temporary closed or closed period.
- The entry's activity belongs to a closed PLA, an inactive project, a project where time entries aren't allowed, or a project restricted to the employee by TET rules.

Delete time entries

To delete an entry you no longer need, can be done by swiping the entry in the overview either to the left or right select the bin. After selecting the bin, the entry will be deleted. In case you swipe by mistake to the left or right, the bin disappears after three seconds.

Deleting an entry is not allowed if:

- The activity belongs to a closed or temporarily closed PLA or an inactive project.
- The timesheet entry is PL-approved, invoiced, a correction, or imported.
- The entry's date falls within a closed period, a completed time, or a project manager approved time.

Logout

After logging out, the user is redirected to the login screen. If the user tries to leave a detailed entry view without saving changes, a confirmation popup will appear with the message:
"Are you sure you want to leave without saving? All of your changes will be lost."

The popup provides Yes/No options to confirm the action.