Manual

myparm

Working as an administrator

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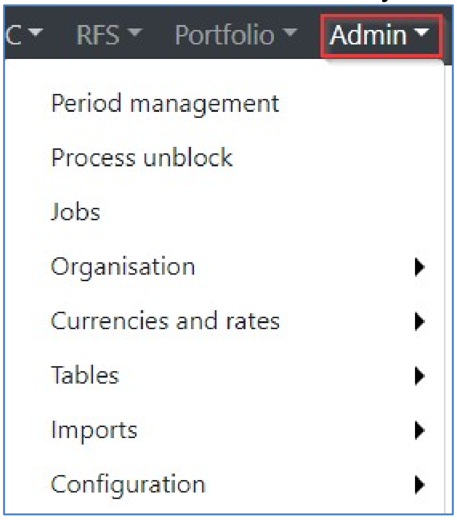
Status: 09/2025

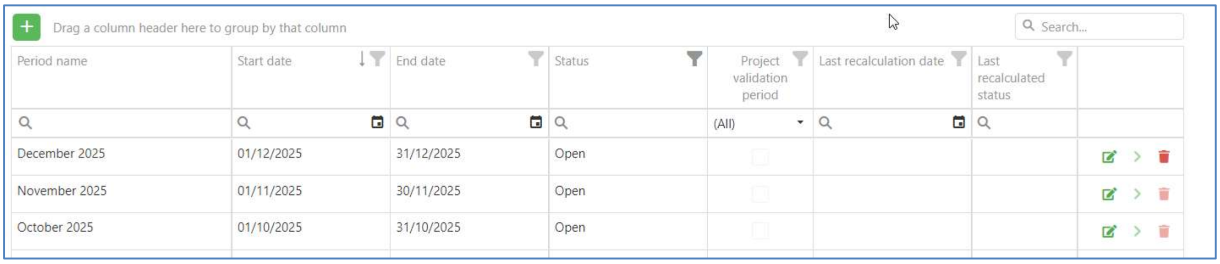
Content

There are some tasks in myPARM that can only be performed by an administrator.



1. Period management

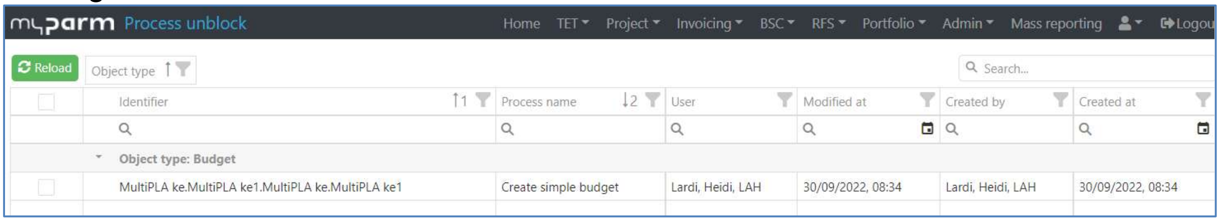
It is recommended that periods for at least the current year are fully added. The current period is displayed first. Periods can be temporarily closed. Only administrators can then carry out the necessary changes / modifications.
A temporarily closed period can also be reset to «Open». Temporarily closed periods can be closed. Then no more changes/modifications can be done for this period. A closed period can no longer be opened. If periods are to be deleted, you must start with the most recent one. In the example below, that would be December 2025. Then November 2025 can be deleted, etc.



Period name	Start date	End date	Status	Project validation period	Last recalculation date	Last recalculated status	
				(All)			
December 2025	01/12/2025	31/12/2025	Open				
November 2025	01/11/2025	30/11/2025	Open				
October 2025	01/10/2025	31/10/2025	Open				

2. Process unblock

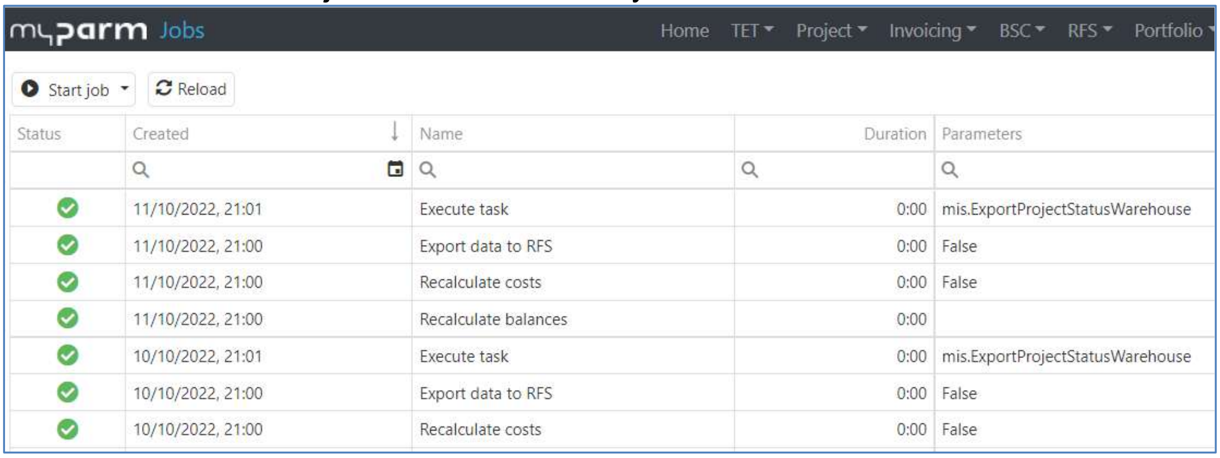
A user started a process but did not complete it. Another user should now end the process. To do this, it must be unlocked. This means that the process that is still open is closed and it can now be continued for every user with the appropriate authorization. The processes are structured by topic. It lists the process name, user, and when the process was created and modified.
The process is released again by ticking the box on the left side of the process and clicking «Unblock».



	Identifier	Process name	User	Modified at	Created by	Created at
	Object type: Budget					
	MultiPLA ke.MultiPLA ke1.MultiPLA ke.MultiPLA ke1	Create simple budget	Lardi, Heidi, LAH	30/09/2022, 08:34	Lardi, Heidi, LAH	30/09/2022, 08:34

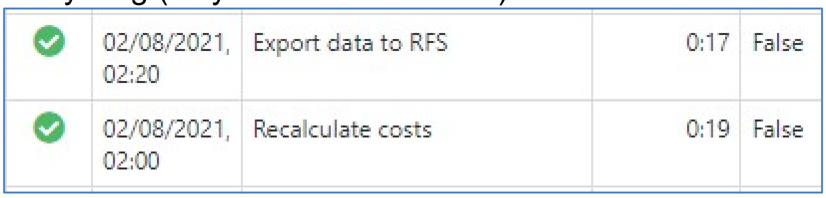
3. Jobs

There are some overnight jobs like recalculating the data and exporting to RFS. The list shows whether the jobs have run correctly.



Status	Created	Name	Duration	Parameters
✓	11/10/2022, 21:01	Execute task	0:00	mis.ExportProjectStatusWarehouse
✓	11/10/2022, 21:00	Export data to RFS	0:00	False
✓	11/10/2022, 21:00	Recalculate costs	0:00	False
✓	11/10/2022, 21:00	Recalculate balances	0:00	
✓	10/10/2022, 21:01	Execute task	0:00	mis.ExportProjectStatusWarehouse
✓	10/10/2022, 21:00	Export data to RFS	0:00	False
✓	10/10/2022, 21:00	Recalculate costs	0:00	False

The "Recalculate costs" job runs every night for a maximum of 12 periods that are not yet permanently closed. Closed periods are no longer recalculated. The job then has a white tick in the green circle, but with the text «False». This shows that not everything (only the last 12 months) was recalculated. But everything is fine.

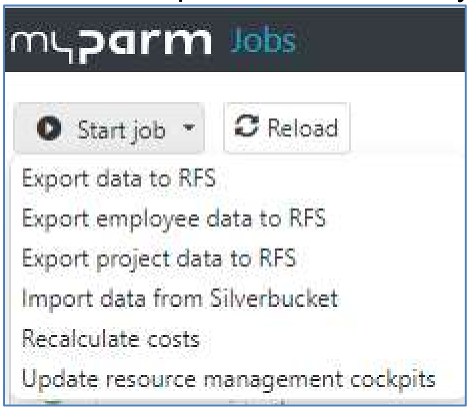


✓	02/08/2021, 02:20	Export data to RFS	0:17	False
✓	02/08/2021, 02:00	Recalculate costs	0:19	False

The recalculation of the costs for all periods that have not yet been closed takes place on Saturday mornings. Since this calculation can take longer, depending on the number of periods that are not yet permanently closed, very few users are affected. During this time, for example, no hours / expenses can be saved in the TET, as these are recalculated. The current data is then exported to the RFS.

	31/07/2021, 02:32	Export data to RFS	0:22	True
	31/07/2021, 02:00	Recalculate costs	0:31	True

Individual jobs can also be started manually. However, it must be ensured that during the time of recalculation, e.g. no hours / expenses can be saved in the TET and the user can be prevented from carrying out his work.

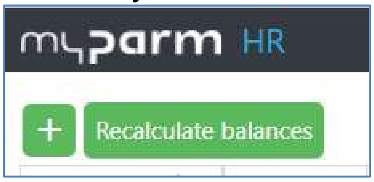


4. Organisation

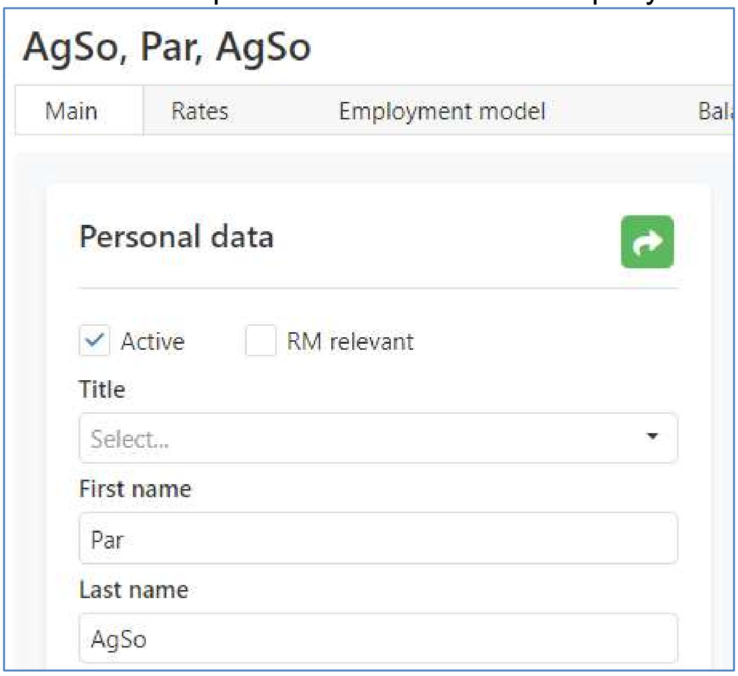
4.1 HR – Adding new employees and changing existing ones

All employees are displayed on the left side of the screen. If an employee is selected with the mouse, details appear on the right-hand side of the screen.
To enlarge the right side of the image, press the left arrow in the middle.

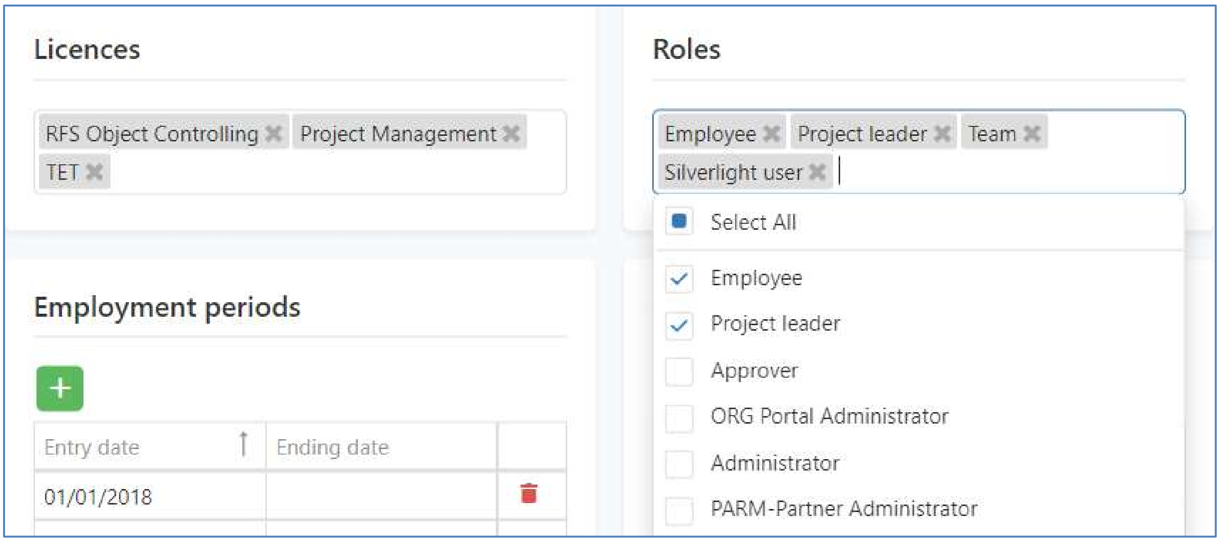
To register a new employee, click on the green plus.
If a recalculation of the balances (working hours and holidays) for all employees is necessary, the button 'Recalculate balances' is clicked.



First come the personal data and the company fields, if defined.



Then the license and role assignments follow. If you click in a field, all available licenses and roles are displayed, which are then transferred to the field with a tick. The explanation of the roles is available at the end of the manual.

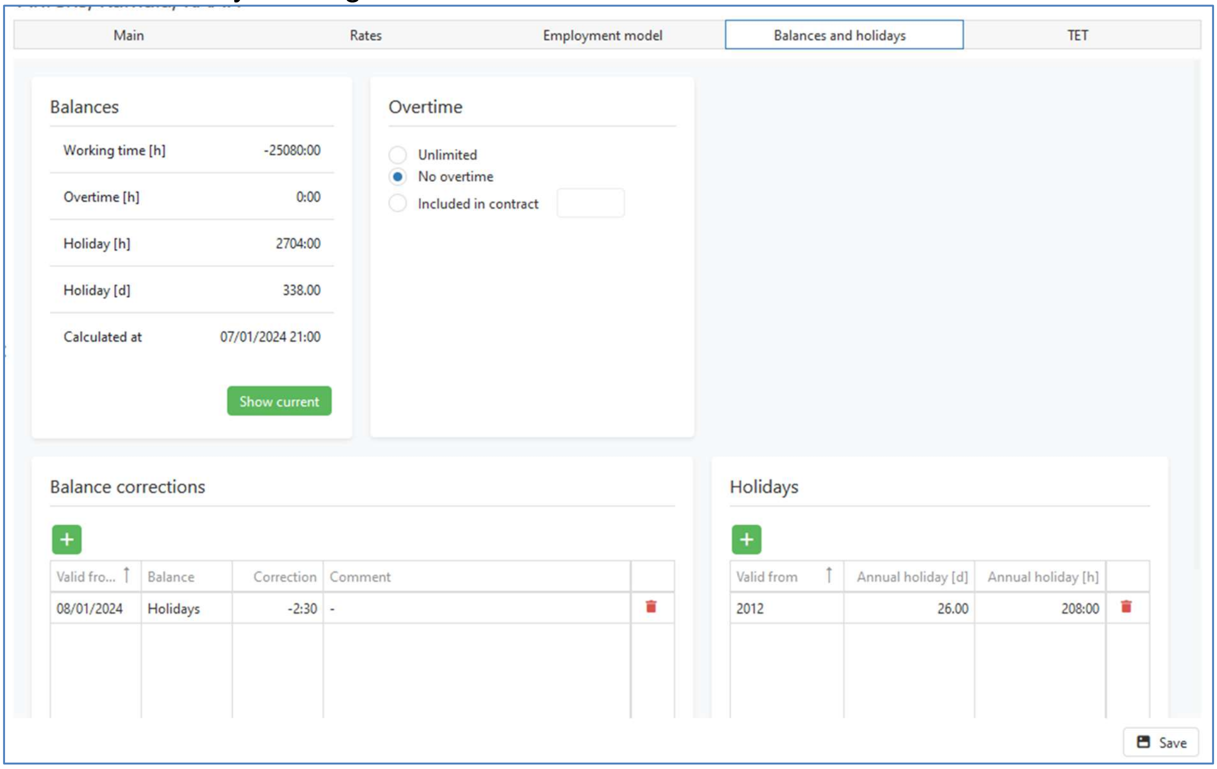


All fields with a red exclamation mark must be filled out and blank lines are added with the green plus, which can then be filled out.

If an employee's employment percentage is changed for the future and a new vacation entitlement in days is entered, it will only be correctly displayed in hours once the change date is reached.

4.2 Balances and holidays

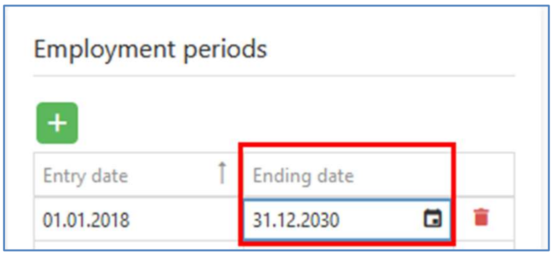
The start date and employment conditions are defined when an employee is created. Under the "Balances and holiday" tab, adjustments can be made if necessary or the balance can be checked at the start of a new employee.
With "Show current" the balances are recalculated directly, otherwise they are recalculated daily overnight.



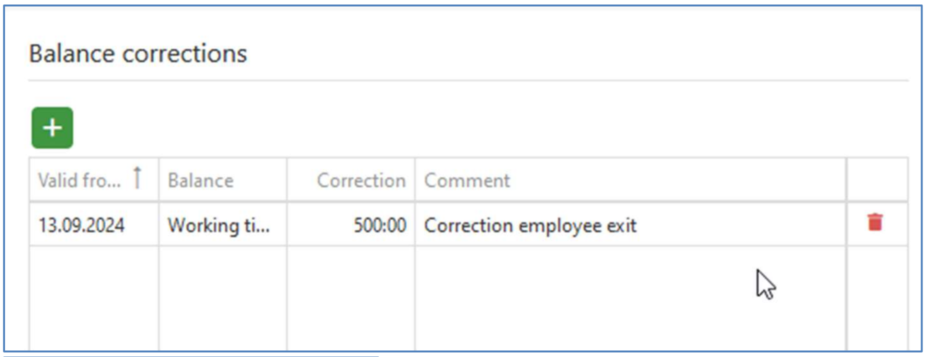
Regulations on overtime can also be stored here.

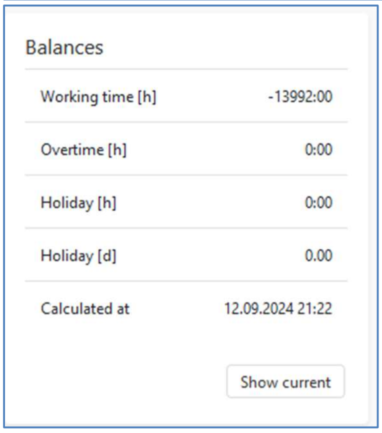
4.3 Final Tasks Upon Employee Exit

For an employee who has left the company, there are still follow-up tasks to complete. They are assigned an end date if this is not provided through the interface.

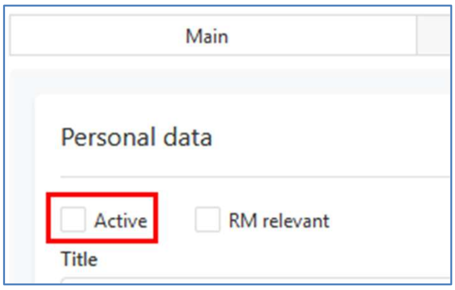


Important:
The remaining balances for working hours and vacation must be set to zero.



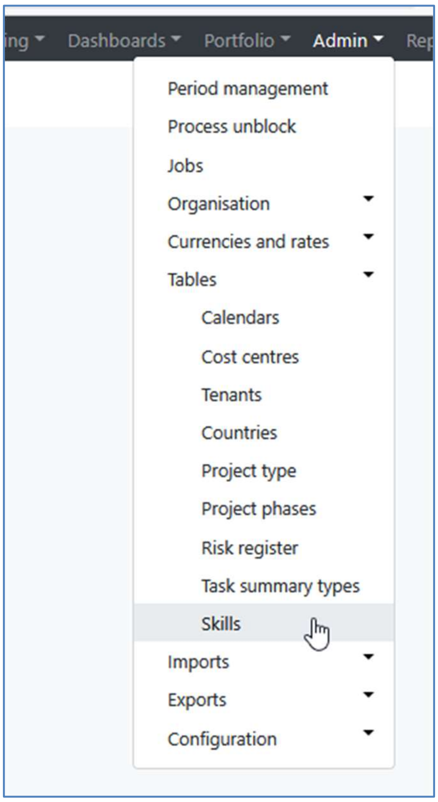


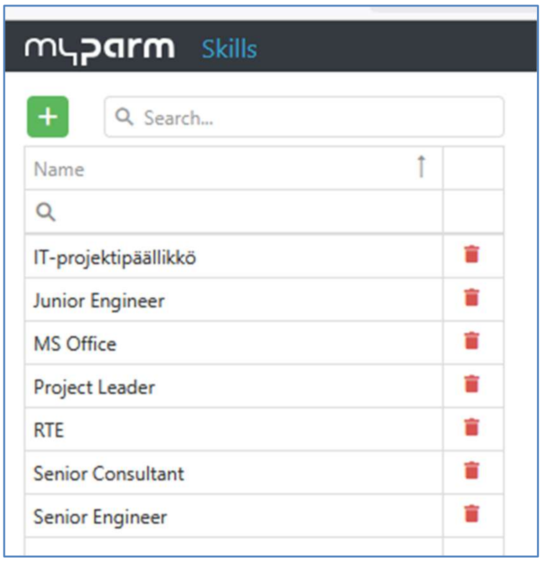
After entering the corrections, press the "Show current" button. All balances should now be zero.
If the employee returns, they will start with a balance of zero for working hours and vacation.
If the employee should no longer appear in reports (Reports, MIS), the active status checkmark should be removed.



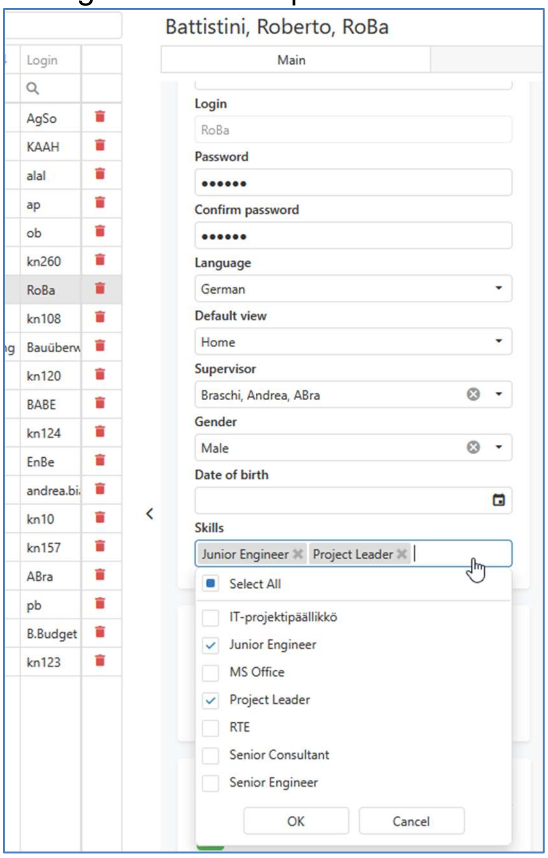
4.4 Skills

It is possible to assign employees with skills in order to filter them accordingly in team management on projects or in resource planning.
Skills can first be created by an admin under Admin → Tables → Skills:

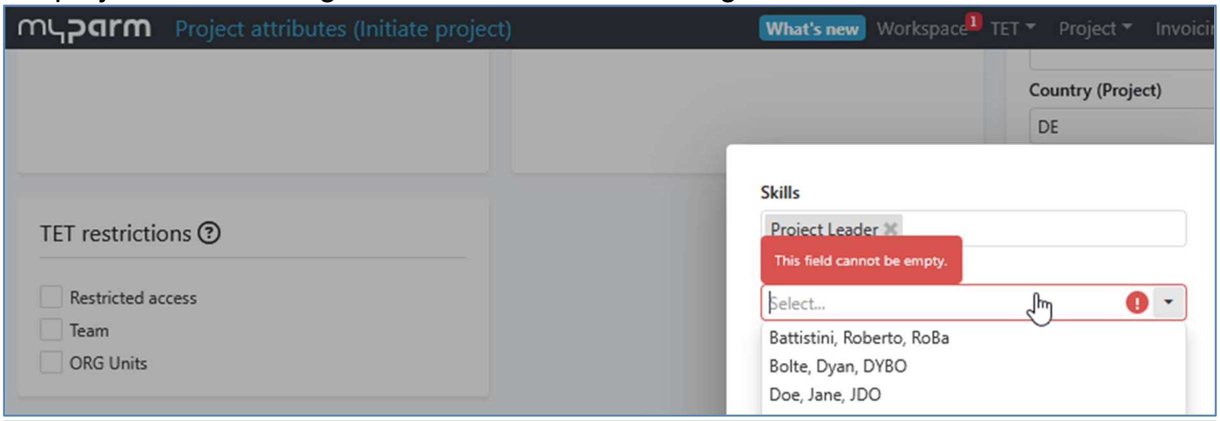


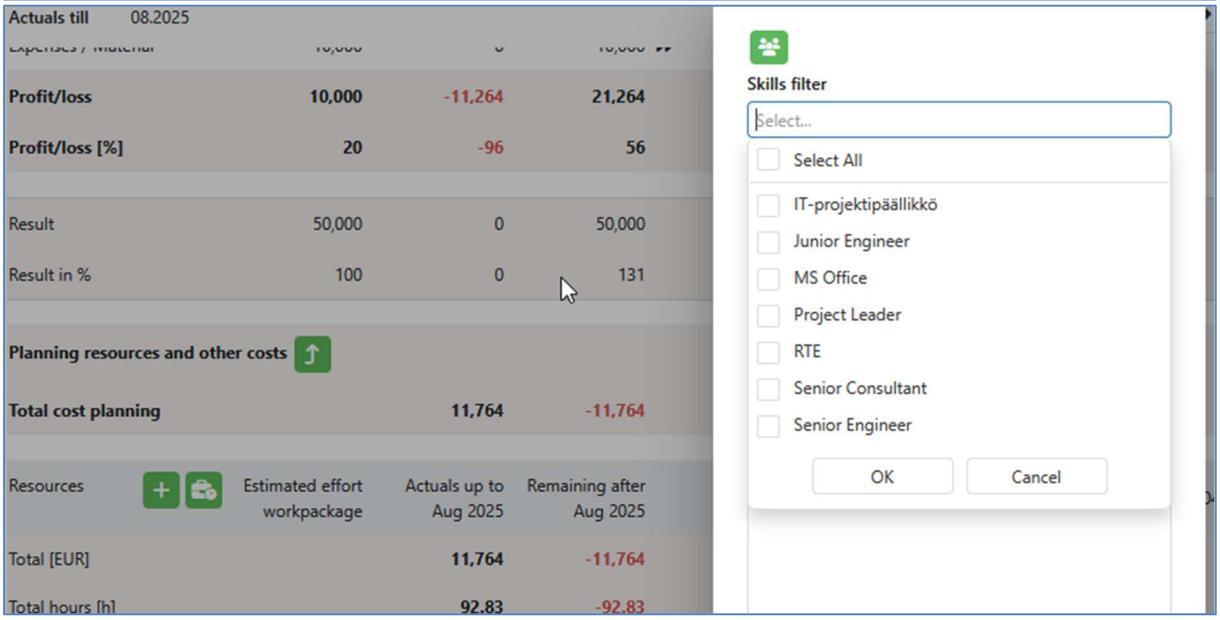


These skills can then be assigned to the respective user in HR:



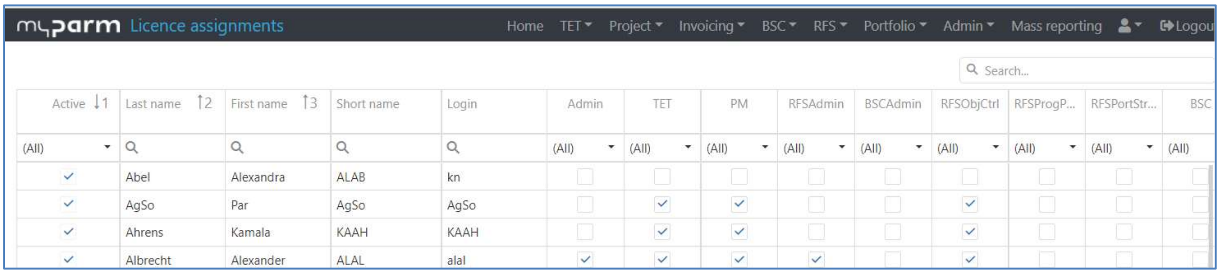
Once employees are assigned with their respective skills, they can be searched for in the project team management or in resource management.





4.5 License Assignment

Every employee who uses myPARM also needs the corresponding licenses.
All employees are included in the list, regardless of whether they are still active or not.



In the column on the far left, "Active", you can choose whether all employees and/or only the active and/or only the inactive ones should be displayed. Inactive employees no longer need a license.

A project manager needs a TET, PM and RFSObjCtrl license.
TET to record hours and expenses, PM to edit projects and MIS Object Control to view the overview of his projects in the MIS → Project Controlling.
An employee who only records hours and expenses need a TET license.

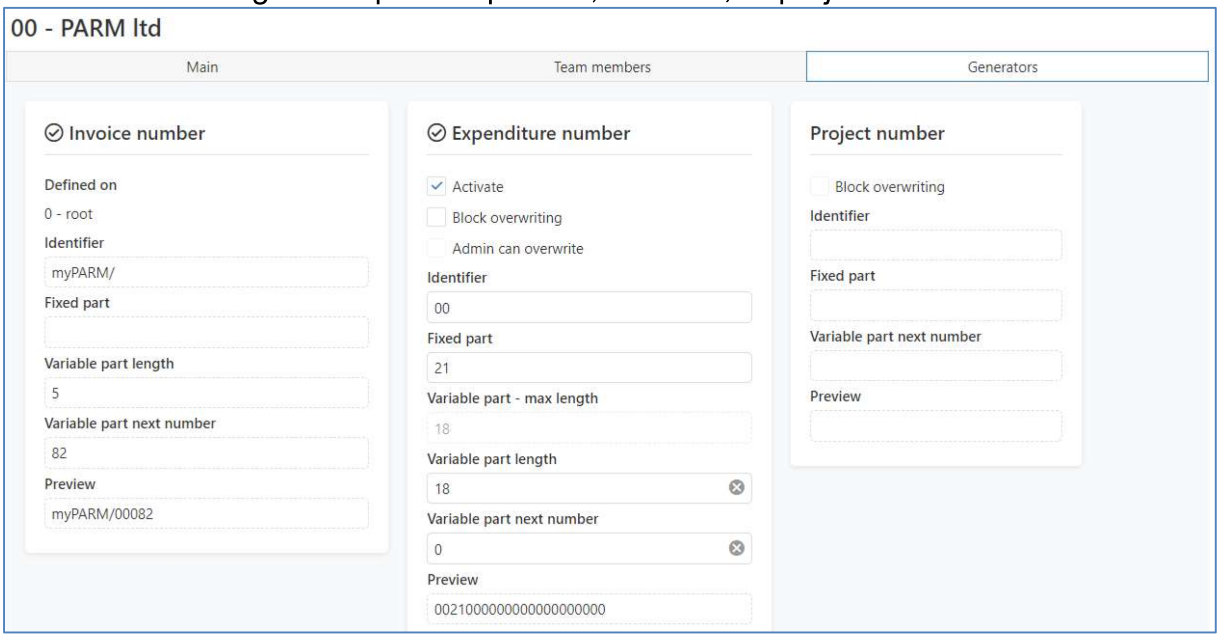
Administrators in a company need an administrator license.
However, this can only be assigned to a user by Parm AG.
An administrator can see everything and edit everything.
If no more administrator licenses are available, more can be ordered from Parm AG.

4.6 Organisational structure

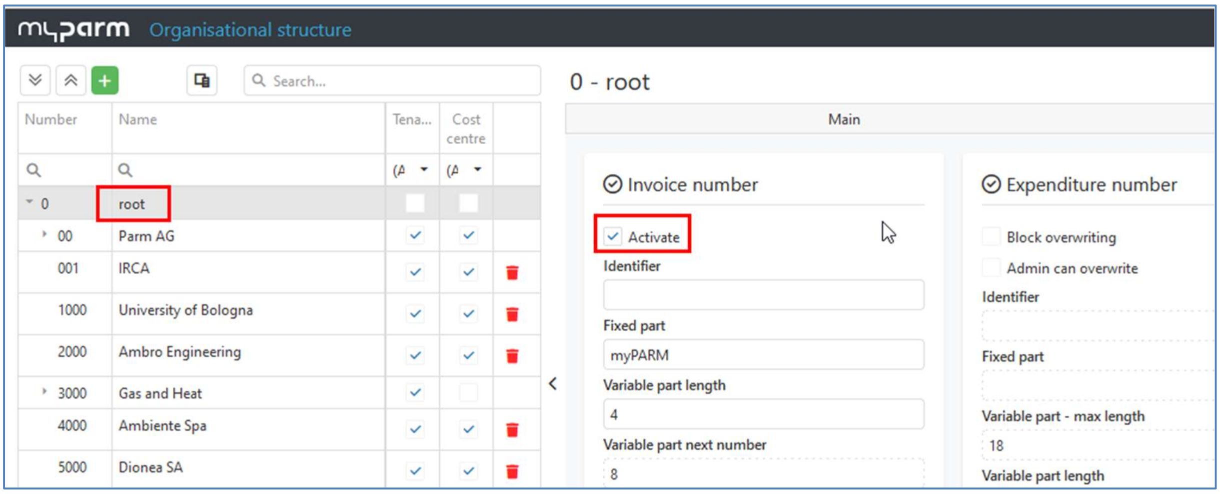
The organizational structure required for the allocation of projects and employees is mapped in myPARM.
A root is always present and is neutral. The company then comes as the next element. The root makes it possible to maintain several companies in one database and to separate them for evaluation purposes. Below the company are the various departments. These can be generated outside of myPARM independently of the organizational structure.

The rule also applies here: With the green plus, another element is added or a blank line is generated, which can then be filled.

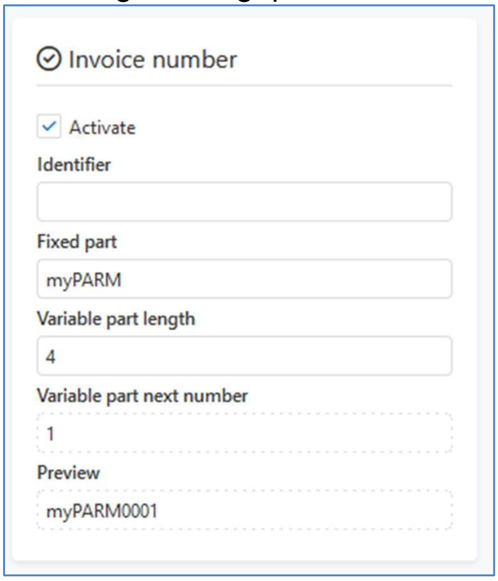
Team members can also be defined. Who should be able to see all projects and employees in the relevant department that are assigned to this department? A number generator for expenses, invoices and projects is also available.
The allocation of the different number ranges usually happens together with the financial accounting.
The preview shows how the selected parameters will display the number. When selecting "Variable part next number," you can specify which number should be used next when creating subsequent expenses, invoices, or projects.



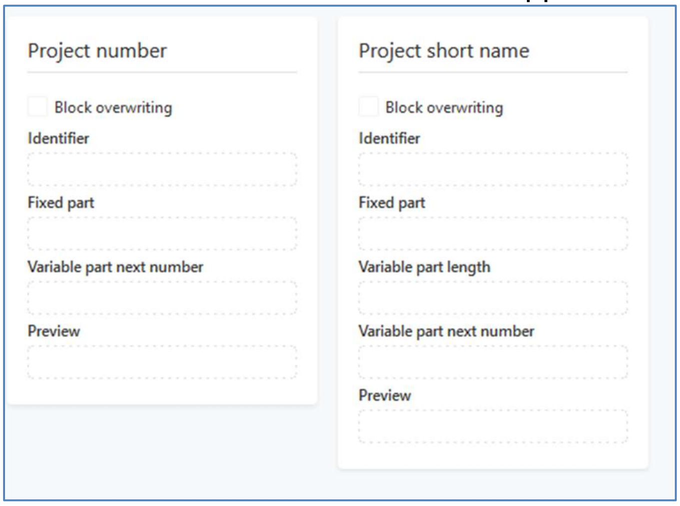
To change the numbering at the turn of the year, select the level where the numbering was configured. In this example, it is the root.



The active checkbox is removed and saved. Now, all fields are empty. The active checkbox is re-enabled, the necessary fields are filled with the new numbers, and saved again. The "Variable Part Next Number" is automatically set to 1 and cannot be changed. No gaps in the numbering of invoices are allowed.



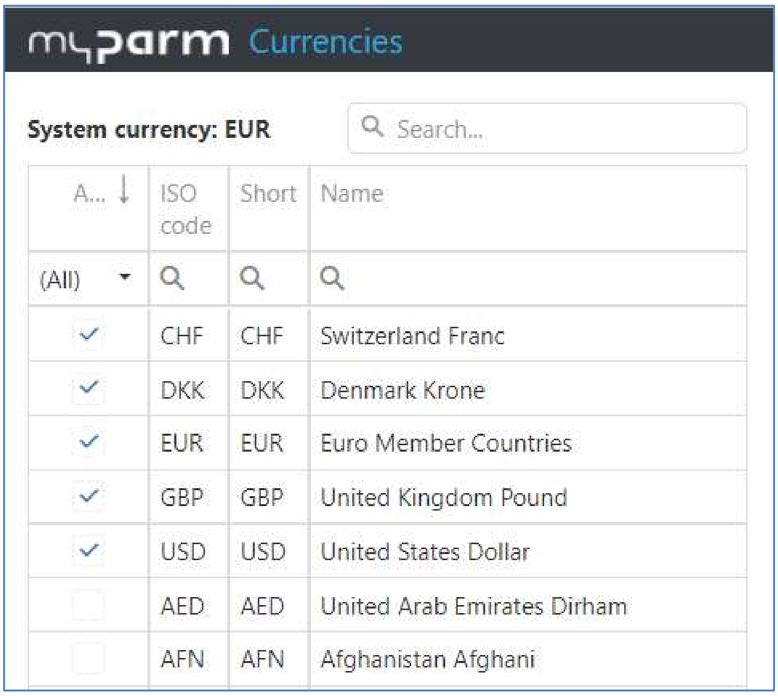
Additionally, it can be defined how the project number and the short code should appear. In addition to the usual information, it can be specified whether it is allowed to overwrite the suggested values. If this is permitted, care must be taken to ensure that numbers or short codes do not appear twice.



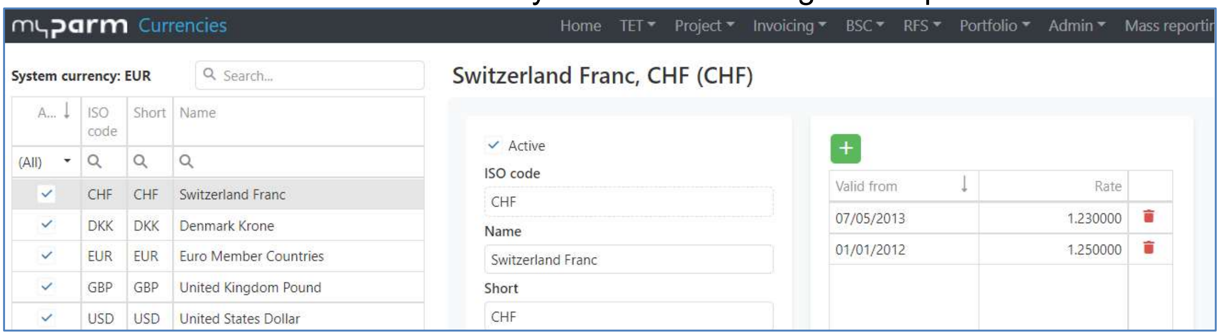
5. Currencies and rates

5.1 Currencies

All currencies are already available, according to the ISO standard.
The active currencies, i.e. those that are needed in the company, are at the top of the list. In most companies, the current exchange rates are imported into myPARM via an interface.

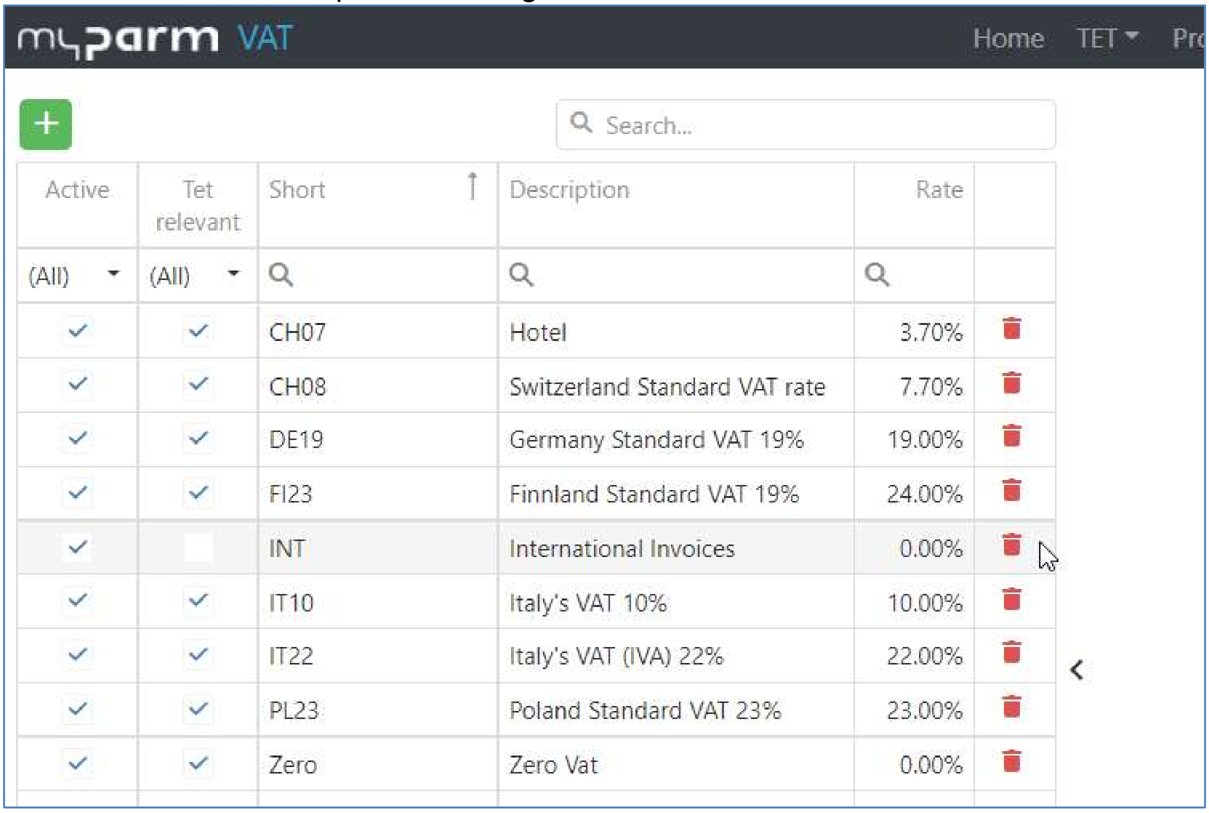


One currency is defined as the system currency, in this example it is EUR. No exchange rate is entered for this.
The calculation for the exchange rate is: 1 euro (system currency) = xx foreign currency.
In the Swiss franc example, this is: 1 euro = 1.10 Swiss francs.
Exchange rates can also be maintained manually. The green plus creates a blank line, which is then filled with the latest exchange rate and a 'valid from' date. The name and abbreviation of the currency can also be changed if required.



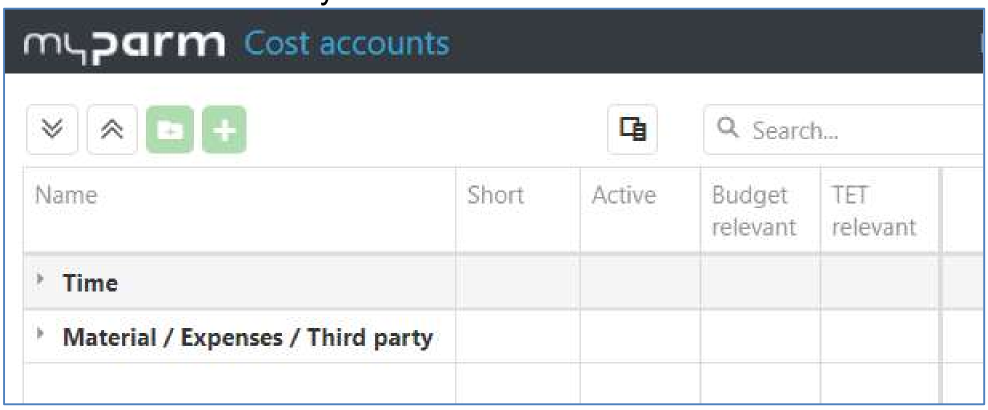
5.2 VAT

All required VAT rates are recorded. These are required when recording expenses in the TET and the subsequent invoicing.

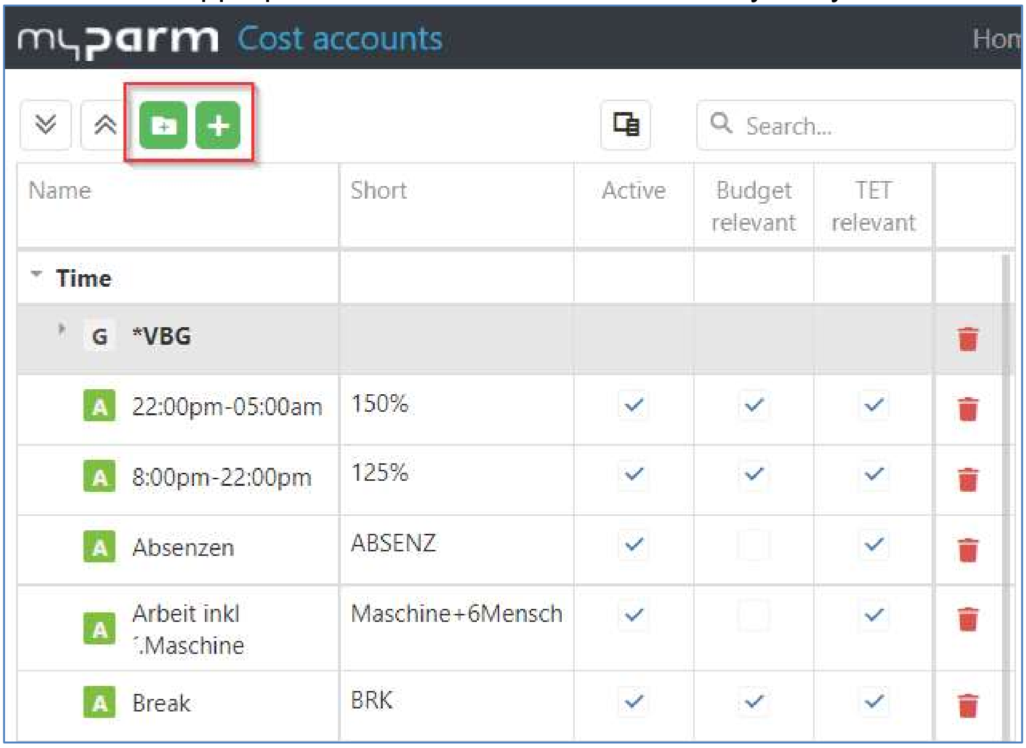


5.3 Cost accounts

In myPARM, the cost accounts for time and material/expenses/third-party services are used as a summary level.



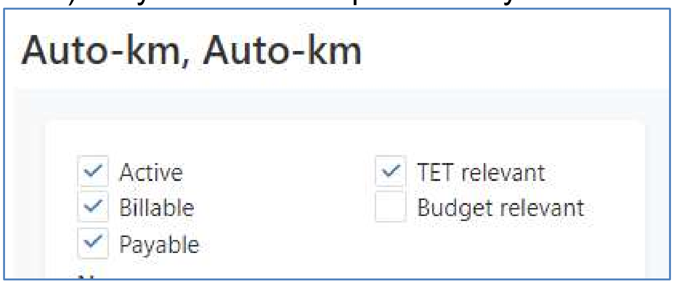
Time: A distinction is made between normal working hours, working hours with supplements such as night work, Sunday work, etc., absences and holidays. These cost accounts can already be stored on the PLA. Employees can also store their most frequently used time account in TET under "My settings" and then do not have to select the appropriate Time account for each hourly entry.



The two green buttons create new cost account groups and new cost accounts in a cost account group.

Material/expenses/third-party services: Cost account groups with cost accounts are recorded here as well. In most cases, the information comes from financial accounting.
Additional information can be added to each expense account.

1) TET relevant: Can the cost account be used in the TET?
2) Budget relevant: Can the cost account be planned in the budget
3) Billable: the entry is marked 'Billable' when it is saved and appears on the invoice.
4) Payable: Is the expense entry to be returned to the employee.



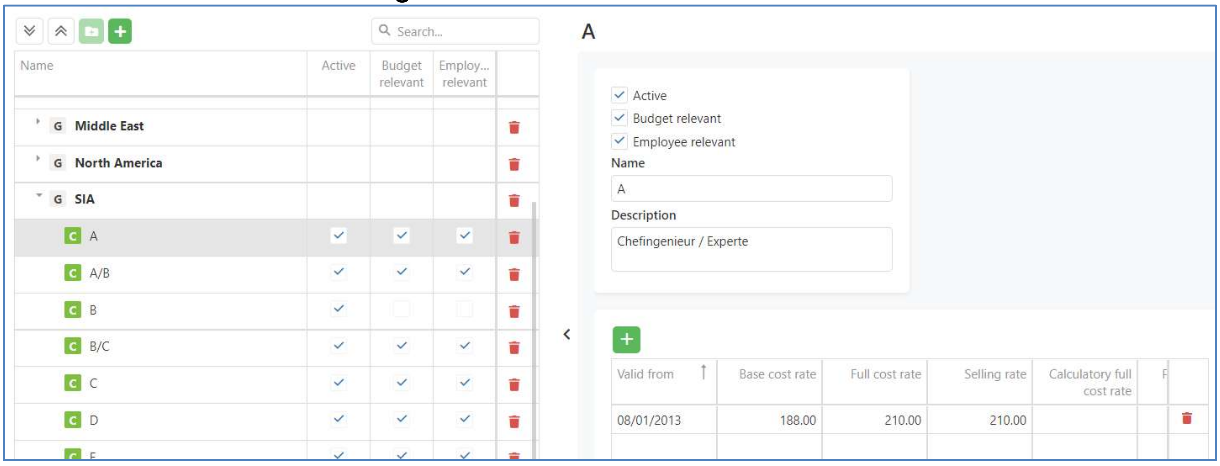
A rate can be stored as the cost price, sales price, etc. as well as the corresponding VAT rate in general and for sales (is identical in most cases).

Valid from	Unit price	Selling rate	Selling fix rate	Planning rate	VAT rate	VAT rate for revenue
01/07/2018	0.55	0.80			19 % - Germany Standard VAT 19%	19 % - Germany Standard VAT
01/01/2022	0.65	0.80			7.7 % - Switzerland Standard VAT rate	7.7 % - Switzerland Standard V rate

This additional information cannot be changed when entering expenses and appears directly as default values.

5.4 Rates & Categories

Categories and rates are required for employees in HR.
Each employee has a category and the associated rates for the basic costs, full cost rate, selling price, calculated full cost rate, planning cost rate and planning selling rate. In most cases, the base rate and the calculated full cost rate are used. Groups can be formed with the categories available below.

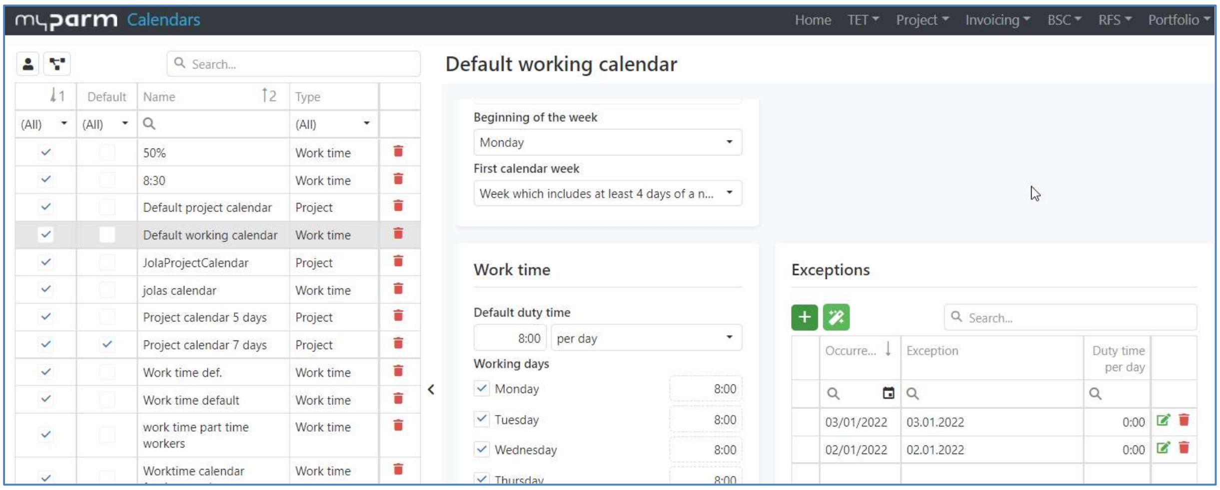


In myPARM it is possible to store sales records in the admin area, in the contract or in the project itself.
The sales record in the project is used first; if no sales record is stored here, it is used from the contract or admin area.
Sales records are always valid until a new sales record is created ("valid from").

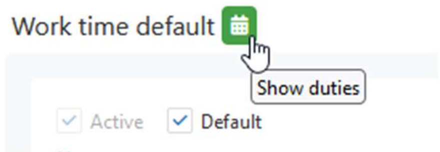
6. Tables

6.1 Calendar

We differentiate between working time calendar and project calendar.
The working time calendar shows the target time that should be worked in a company per week or day. It also contains the free days and public holidays of the year (exceptions). Any number of working time calendars can be recorded, e.g. by region, since the public holidays can be different. The exceptions can also be copied from one calendar to another.
Each employee is assigned to one of the existing calendars. Together with his engagement of employment in HR, his personal working time model is then compiled in the background and the corresponding planned working time is displayed in TET. The free and public holidays appear with a target time of 0 (zero).

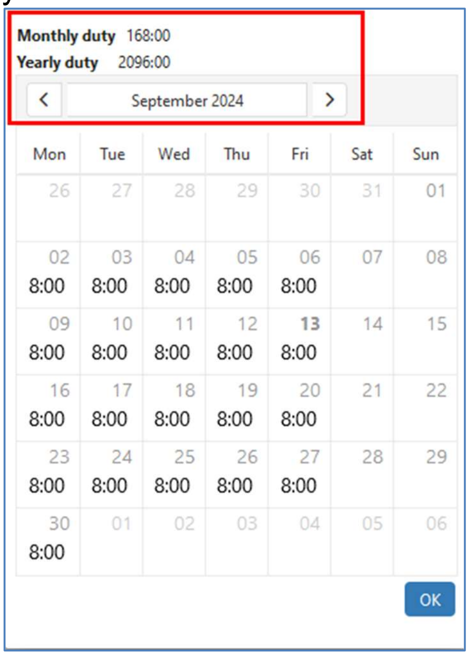


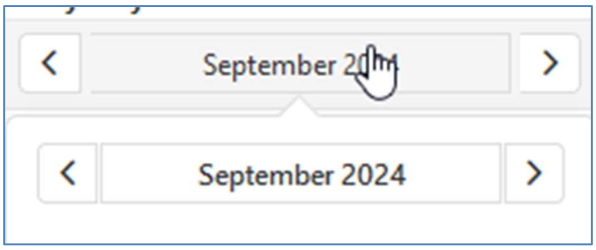
Display of target working time per calendar:

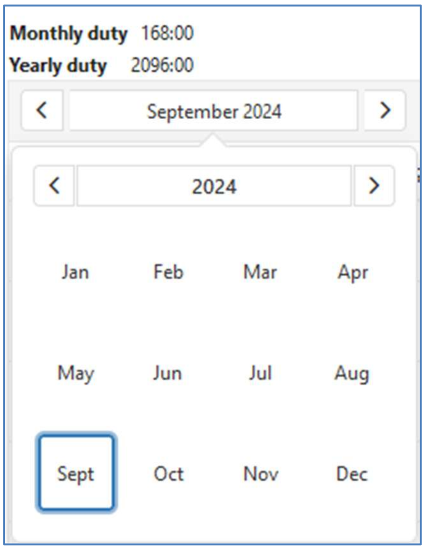


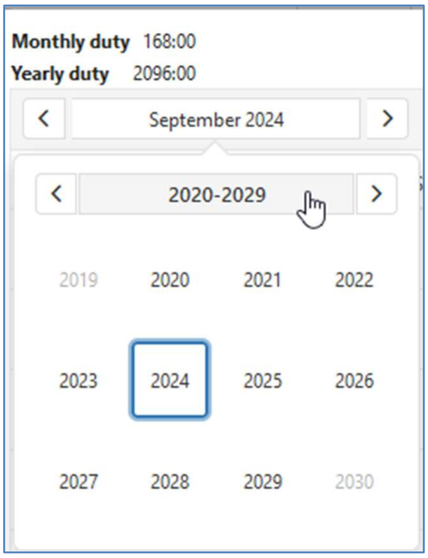
By clicking on the green calendar, a window with the current month will open. It shows the target working time for the respective month, as well as for the entire year.

If you click on the month of September in this view, the year with all 12 months will be displayed. Clicking on the year 2024 allows you to navigate back and forth between years.

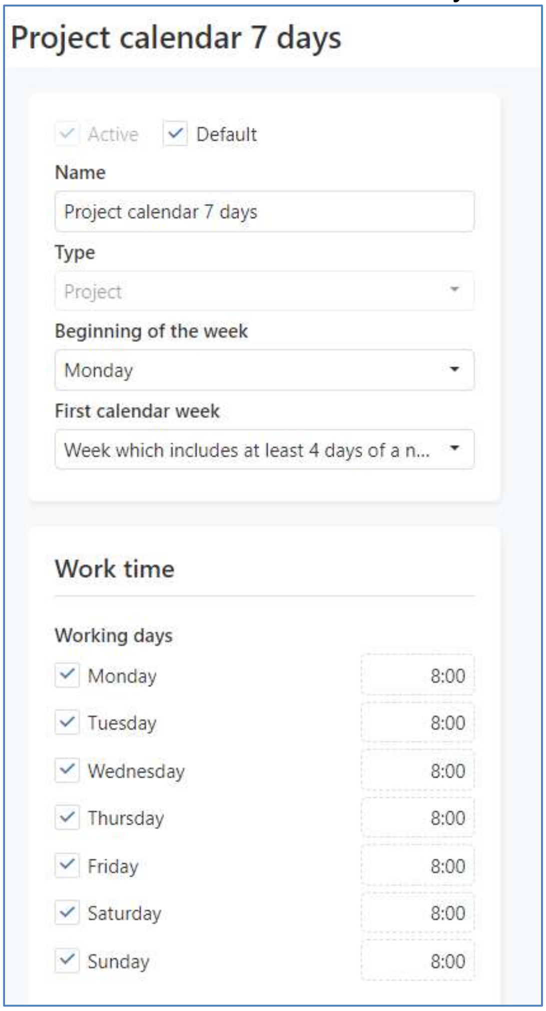






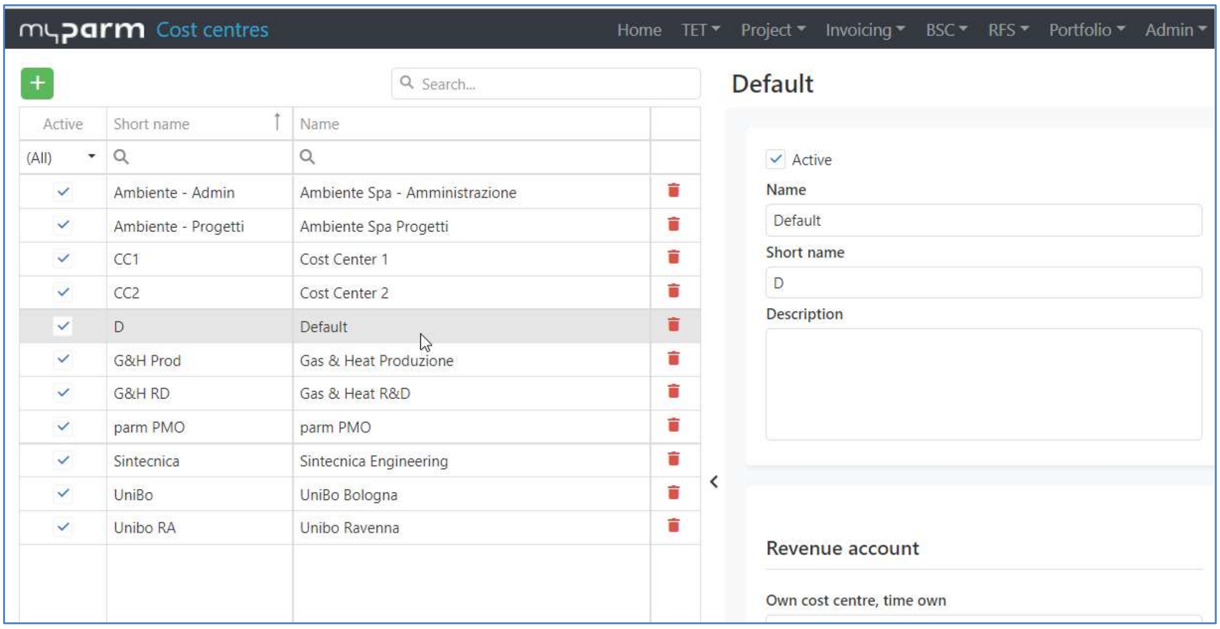


The project calendar is required so that the Gantt can be displayed correctly in the project. It is recommended to create a project calendar with 7 working days. A project calendar has no defined free days and public holidays (no exceptions).



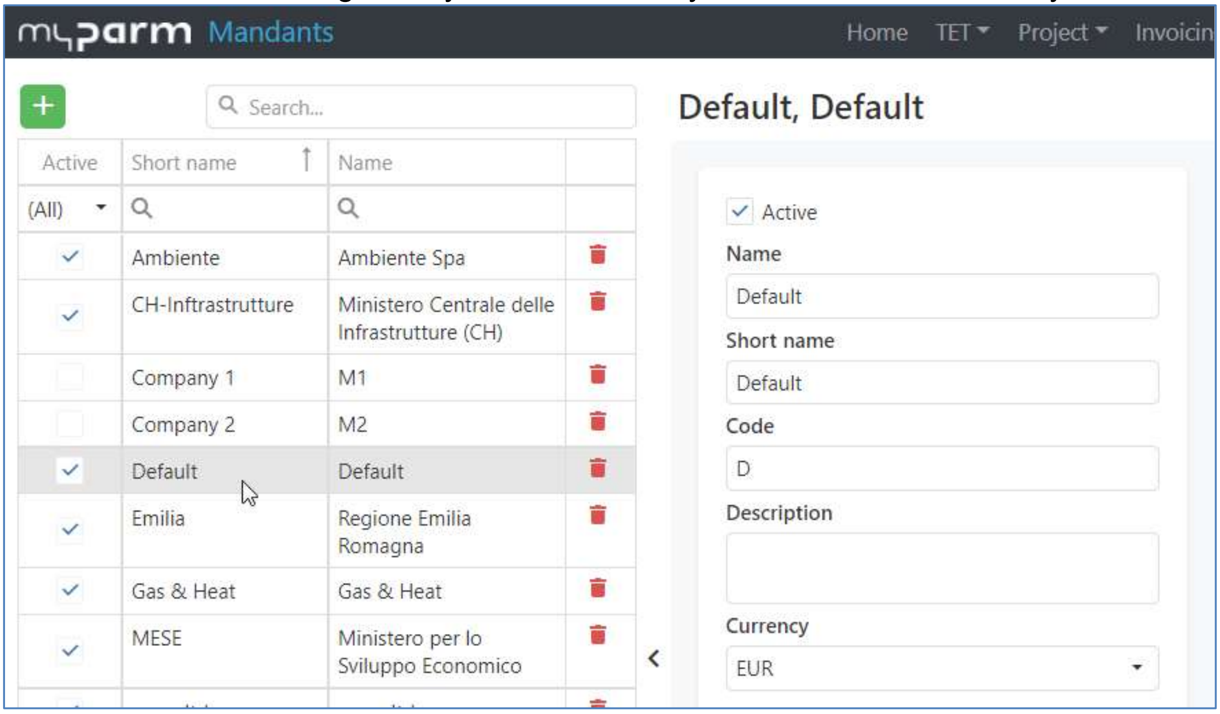
6.2 Cost centers

If there are various cost centers in the organizational structure, they are added here. In addition to the name and abbreviation, the corresponding financial accounting accounts can also be recorded for revenue formation.



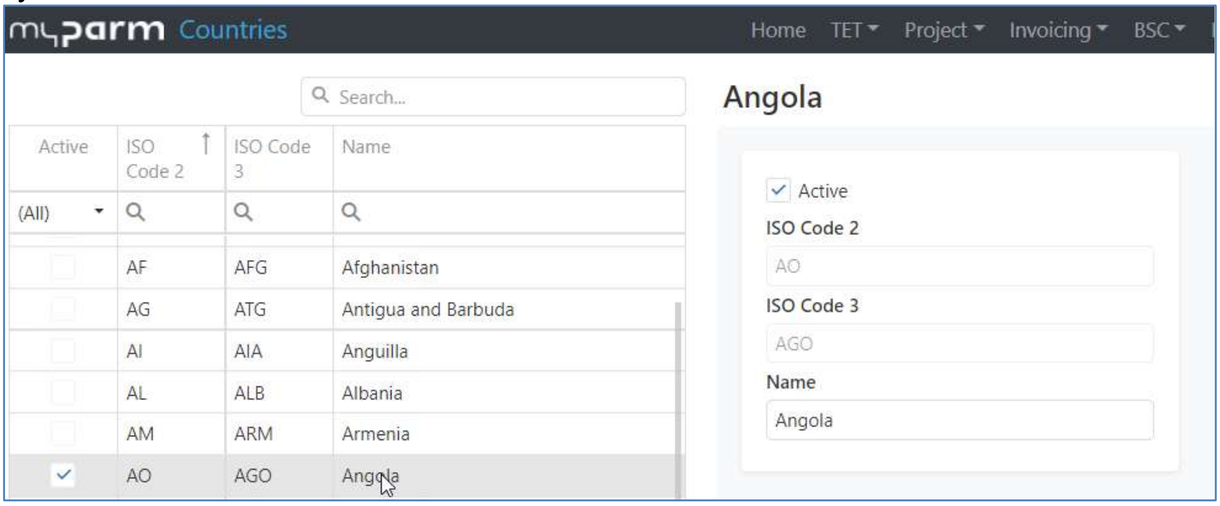
6.3 Tenant

It is possible that the financial accounting department in a company has several clients that can be displayed here. This is necessary above all if there are interfaces to and from financial accounting. It may also be that they have a different currency.



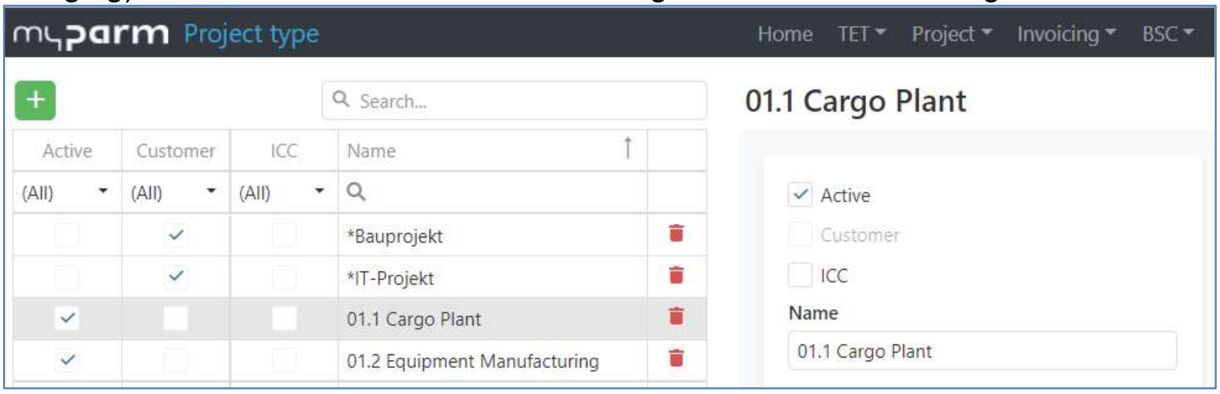
6.4 Countries

All countries are available in myPARM with ISO code 2 and 3.
The user can - if necessary - overwrite the name of the country. The needed countries are marked in the list (tick on the left) and then they would appear in the system.



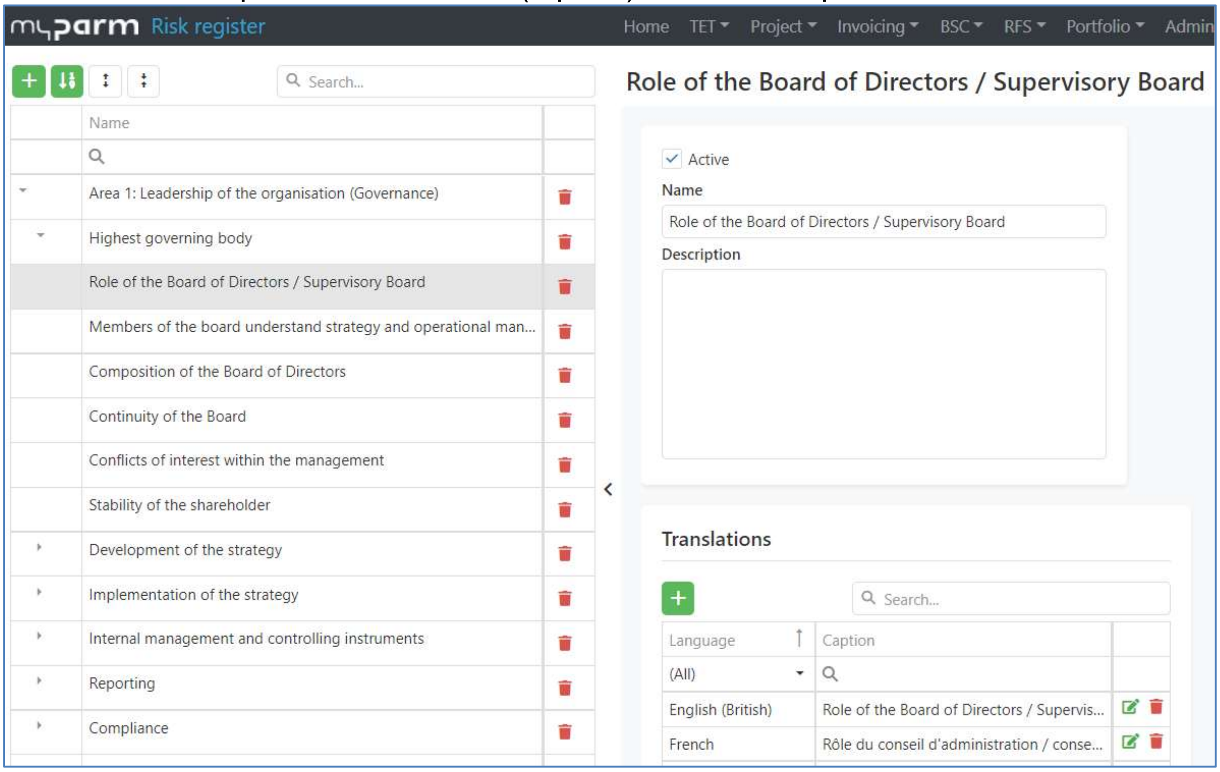
6.5 Project types

Which project types are used in the company?
Is it a project with customers, an internal project such as acquisition, administration, etc. It can be defined whether it is customer-relevant or ILV relevant (internal cross charging). These can all be recorded and assigned later when creating an element.



6.6 Risk register

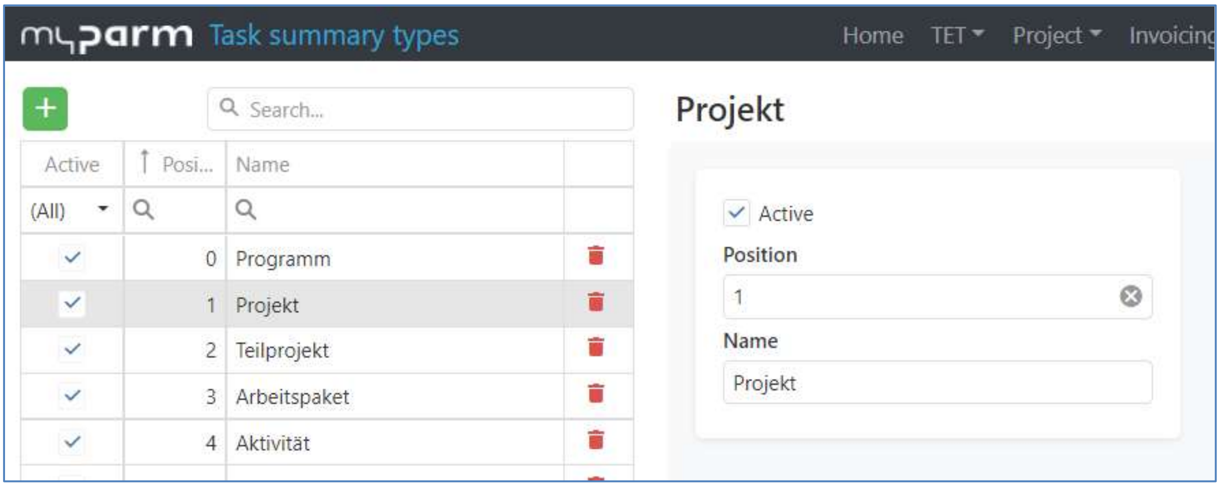
There is a risk register in myPARM that is divided into areas. There are two more steps below. Use the up and down arrows (top left) to move the position in the structure.



New hazard list elements are added using the green plus sign. The arrows allow a hazard area to be moved up or down in the list.
On the right side, it is defined whether a hazard area or specific risk is active, which determines whether this option is visible in the selection box of the risk log.
If fields are added, they should also be translated into the respective language for multilingual usage of myPARM.

6.7 Task summary types

There are different summary level types that can be defined. On which element should sub-elements be summarized?



7. Imports

Expenses and payments can be imported as a text file from financial accounting into myPARM if they are configured in the correct form.
The following fields are used for importing expenses or accounts payable as a text file:

- Document number
- Project.PLA.Activity
- Supplier
- Date
- Net amount
- Account name
- Comment
- VAT code
- Currency code
- Net amount in foreign currency
- Employee code
- Payable
- Client
- Quantity
- Unit price

For additional imports, you can contact Parm AG for file formatting specifications.

The file is copied to the required location, uploaded and then imported. After the import is complete, the system reports how many documents were imported and which could not be imported.

8. Configuration

8.1 Settings

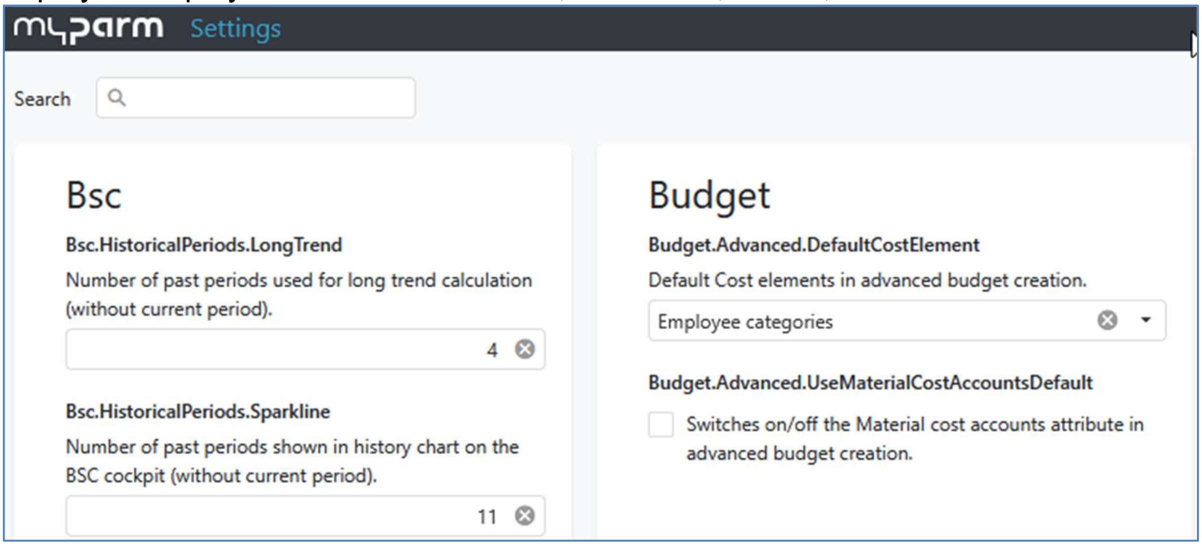
All technical settings are managed here, which should be carried out in consultation with Parm, as they can have a major impact on calculations and thus on data sources.

WARNING:

If changes are made and saved carelessly, the system may no longer function properly. Parm AG accepts no liability for this.

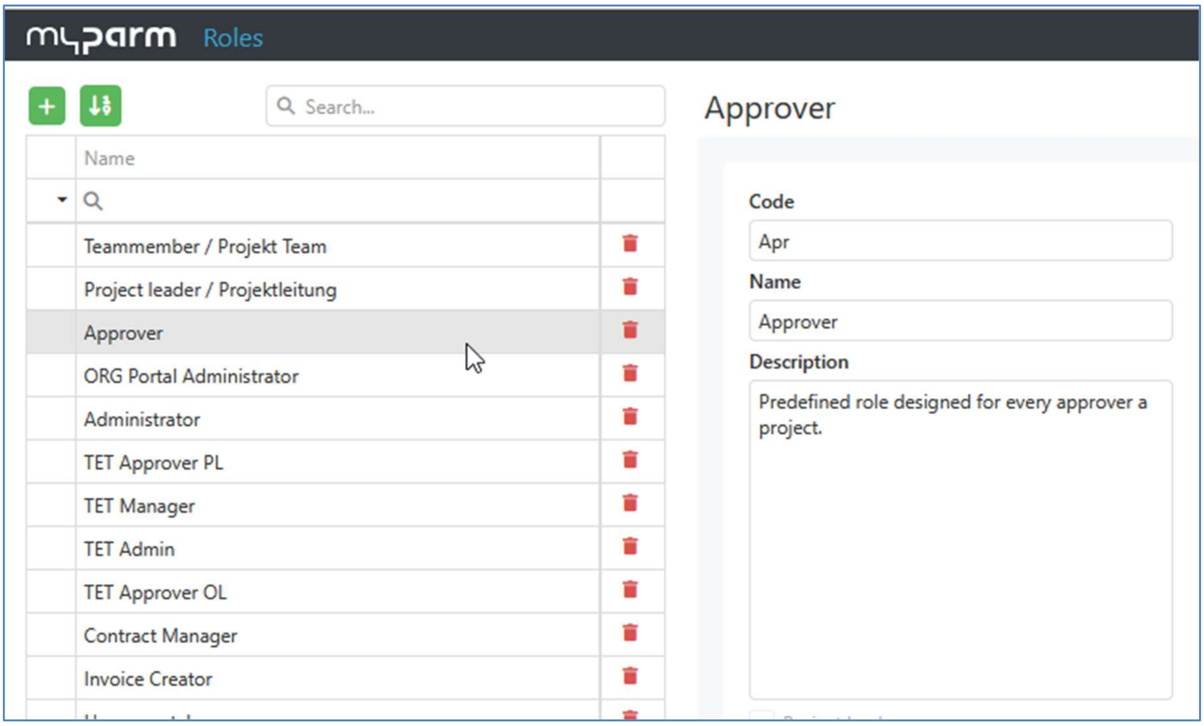
The necessary settings are configured and delivered together with the customer during implementation by Parm AG.

These include, for example, the display of project and activity names in the TET, the display of employee names – last name, first name, initials, etc.



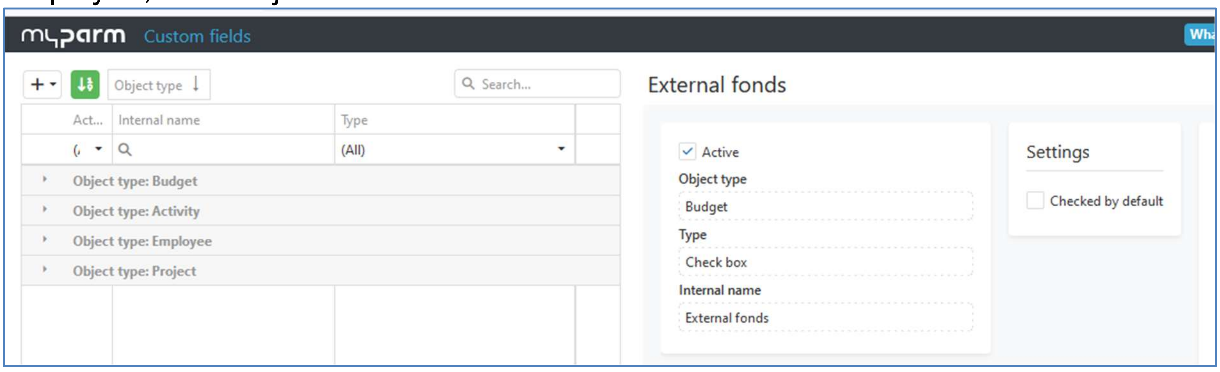
8.2 Roles

In addition to the existing roles, additional ones can be created upon request. Each role has a code and a meaningful name. A description specifies what this role can do. The necessary access rights that the role should have are then added.

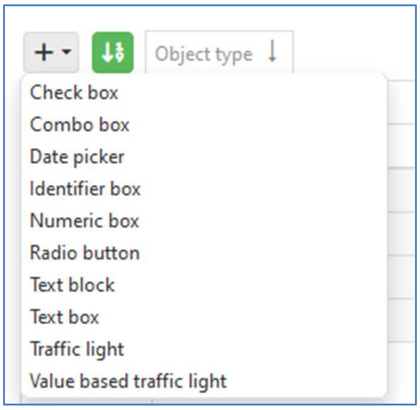


8.3 Custom fields

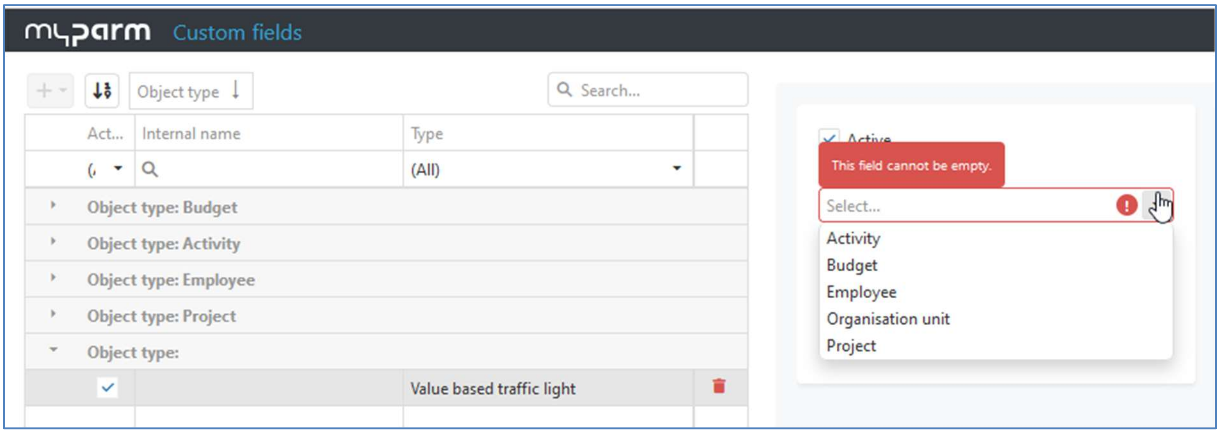
Custom fields can be added upon request for specific areas like Budget, Activity, Employee, and Project.



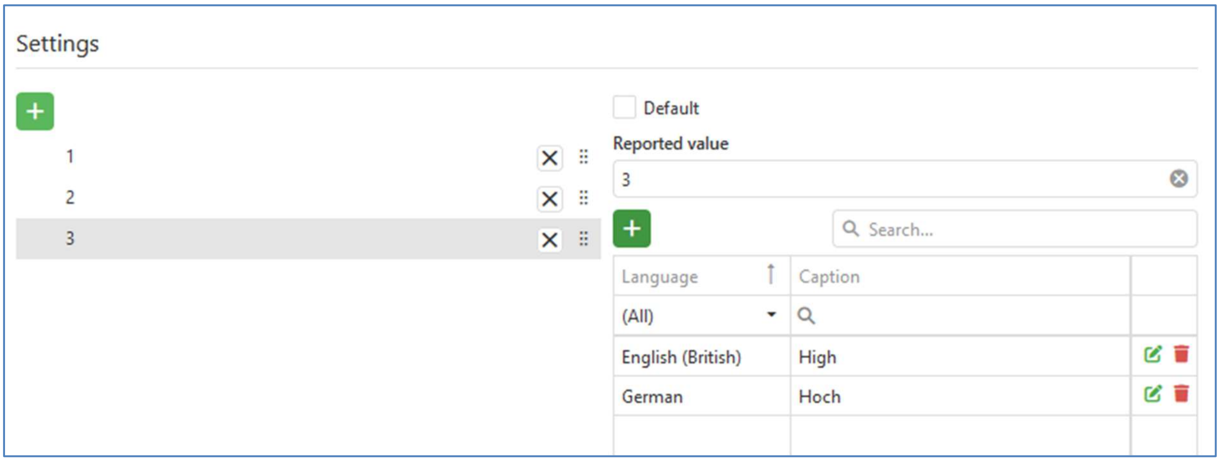
In the top left corner, under the black plus sign, the available options for adding custom fields are listed.



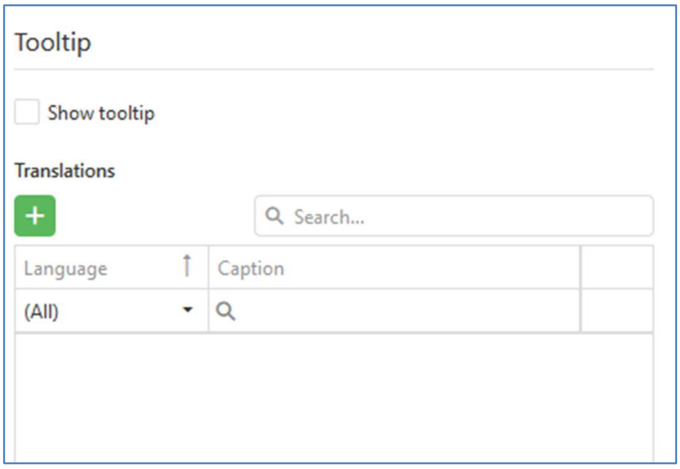
The desired selection is made.
The department where the custom field should appear is then selected.



For dropdown menus, enter the value in the "Displayed Value" field. After leaving the field, the value will appear under "Settings." Additional values can be added by clicking the green plus under "Displayed Value." Expressions in various languages can also be entered below.



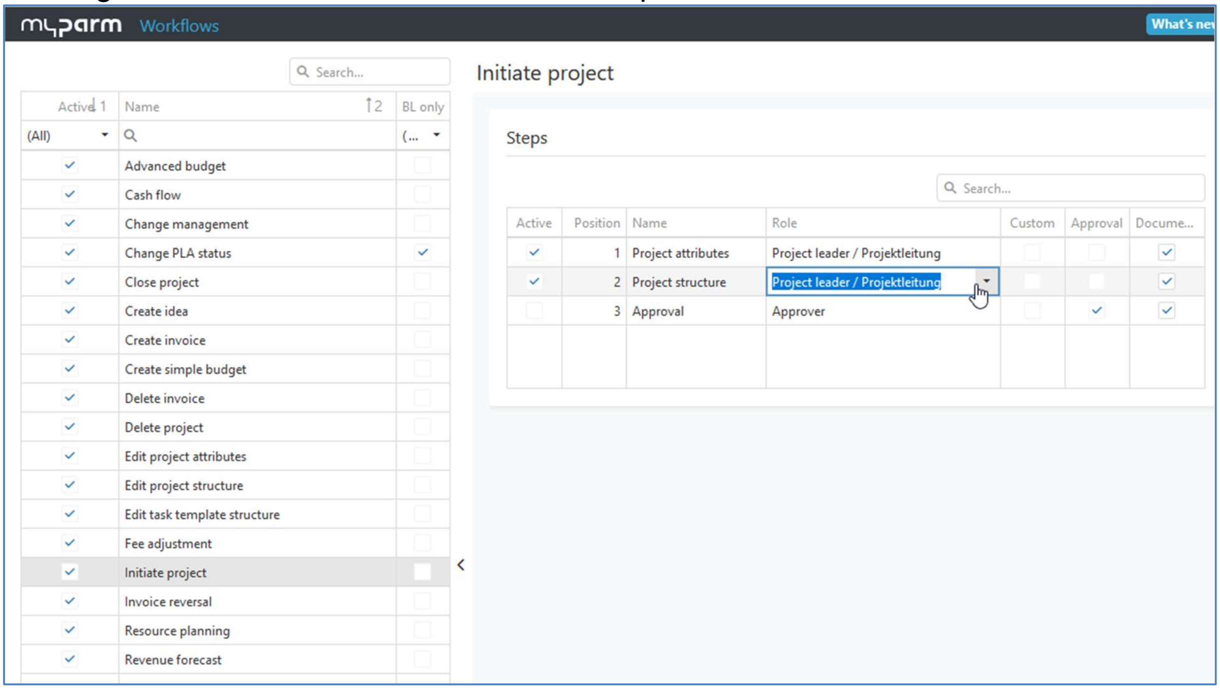
A tooltip can be created for the new field, and translations in multiple languages can be provided.



To incorporate the custom fields into the workflow, refer to section 8.4.

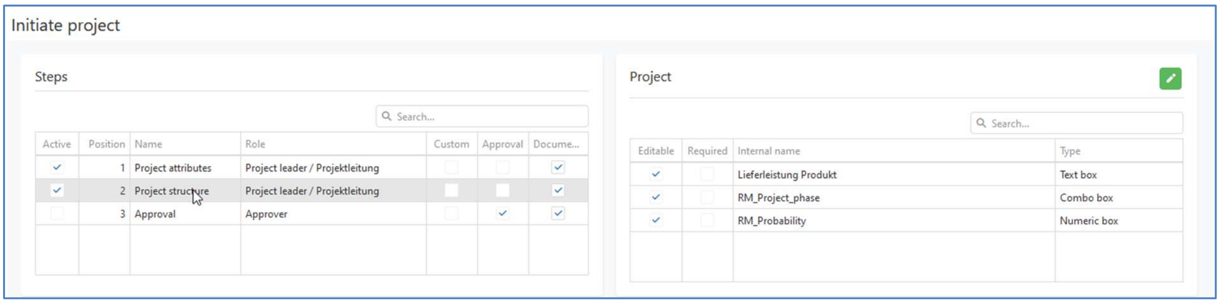
8.4 Workflows

Workflows can be incorporated when only specific roles are allowed to initiate a process, alongside the usual standard roles. For example, only an administrator should be able to open a project. In this case, the workflow "Open Project" is created, defining which role is allowed to execute this process.

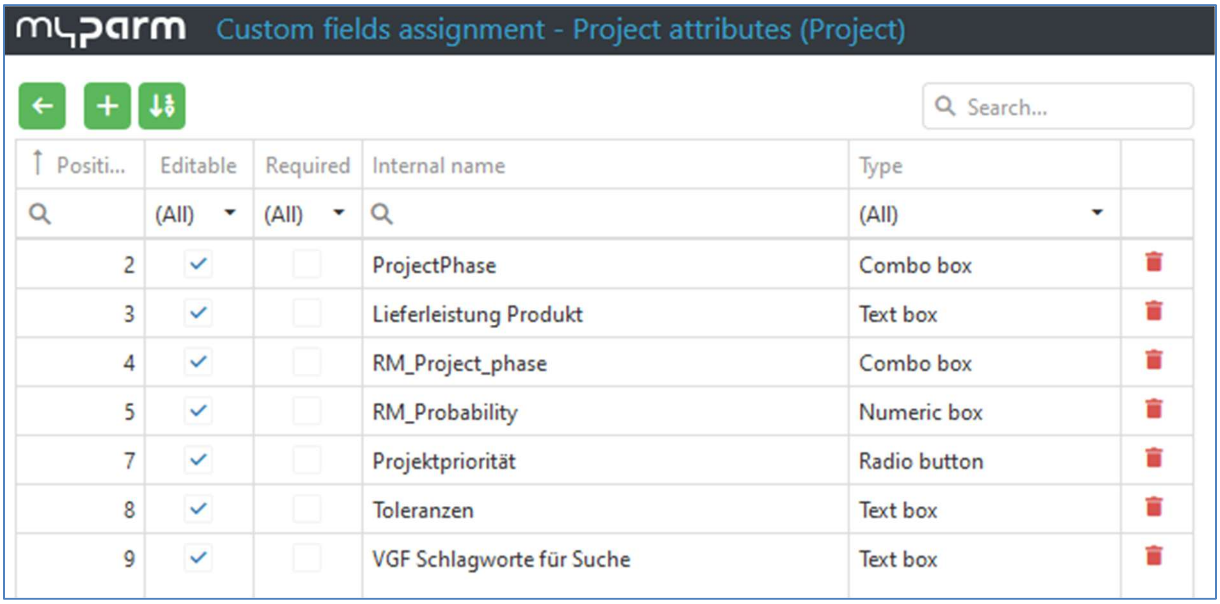


Workflows are necessary when the system-defined role is not permitted to initiate or complete a process. Additionally, workflows are used to display custom fields in specific process steps.

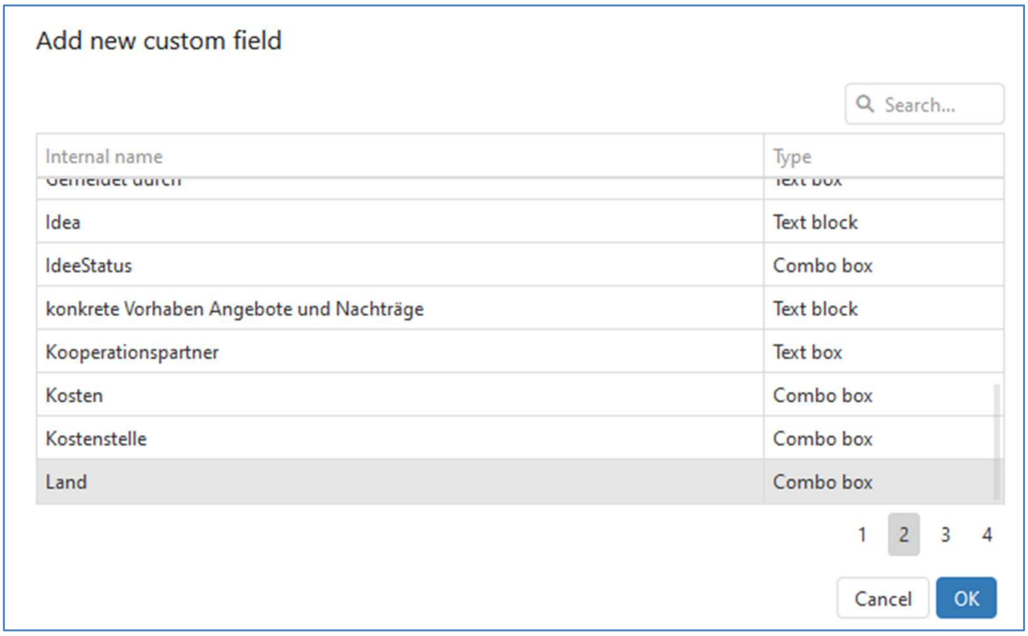
A workflow and then a workflow step are selected.
On the right side, the already assigned company fields for each department are displayed.



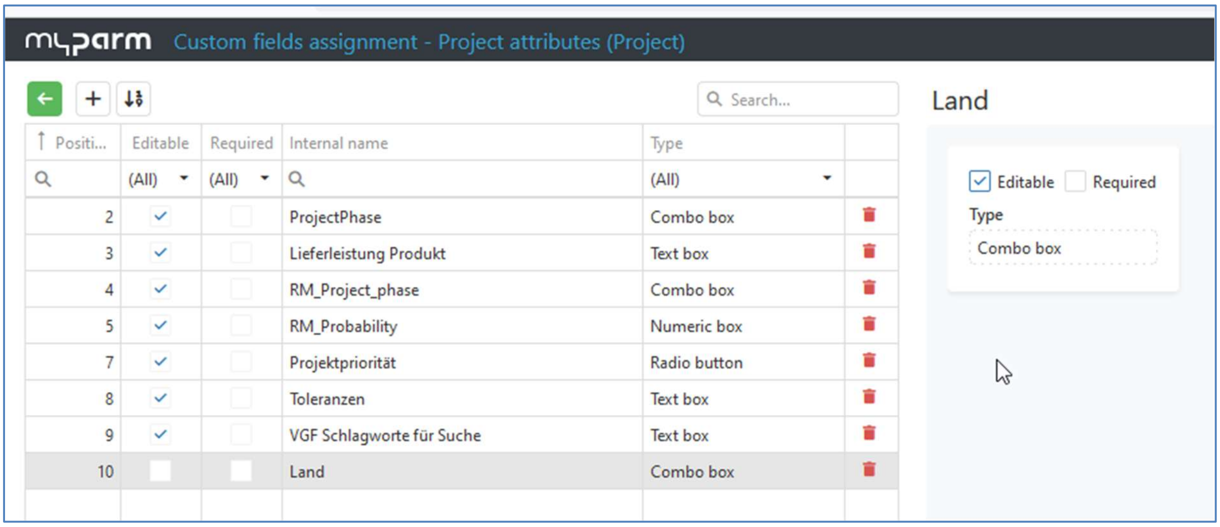
We want to add the "Country" field under the project attributes when opening a project.
Click the green pencil on the right under the "Project" category.
The "Assign Custom Fields" page opens. If fields are already assigned, they are displayed on the left side.
Click the green plus, and all available fields for the "Project" department will be displayed.



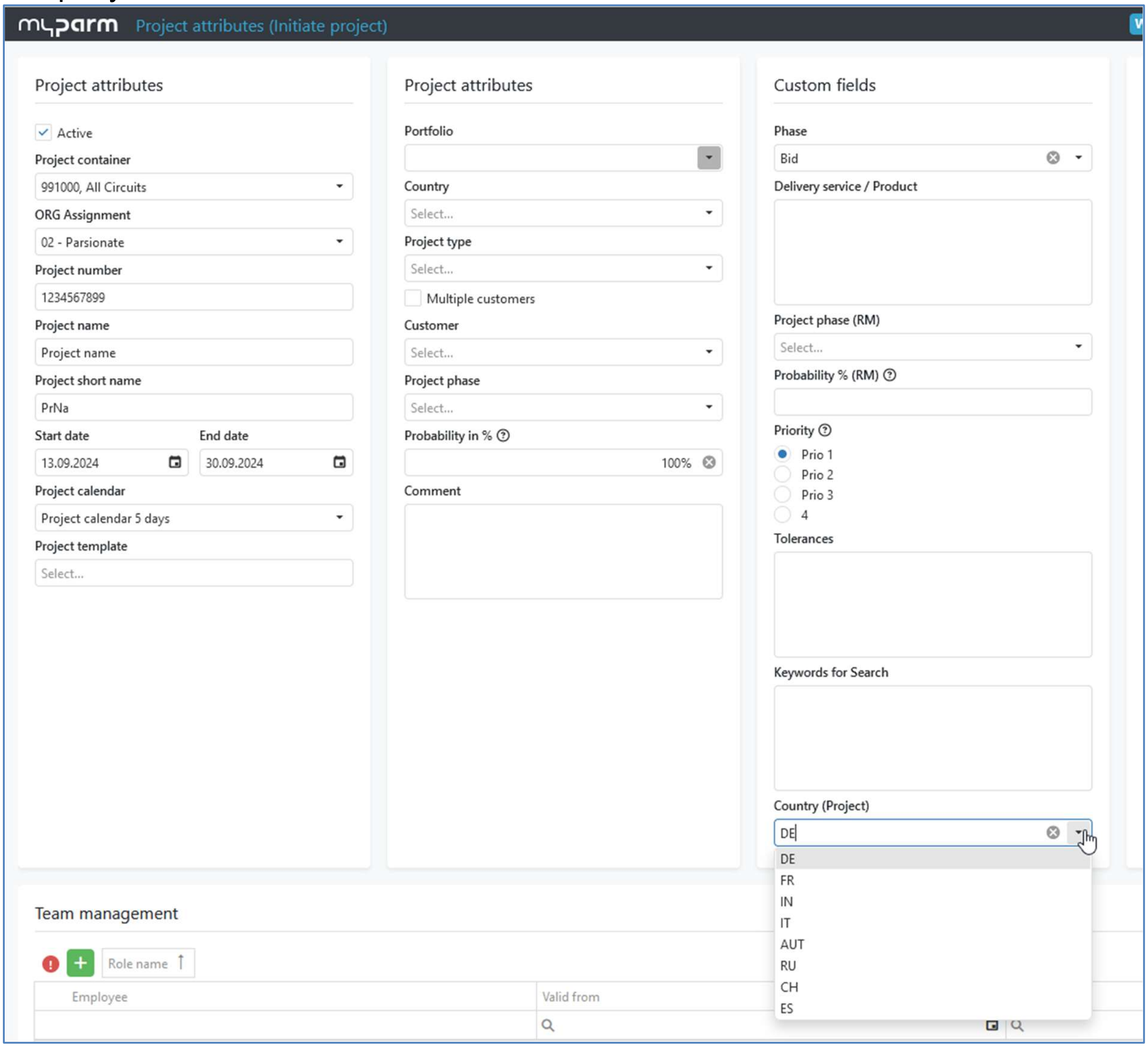
Select the desired field and confirm with OK.



The added field will be listed on the left side, where it can be defined whether the content is editable or mandatory.



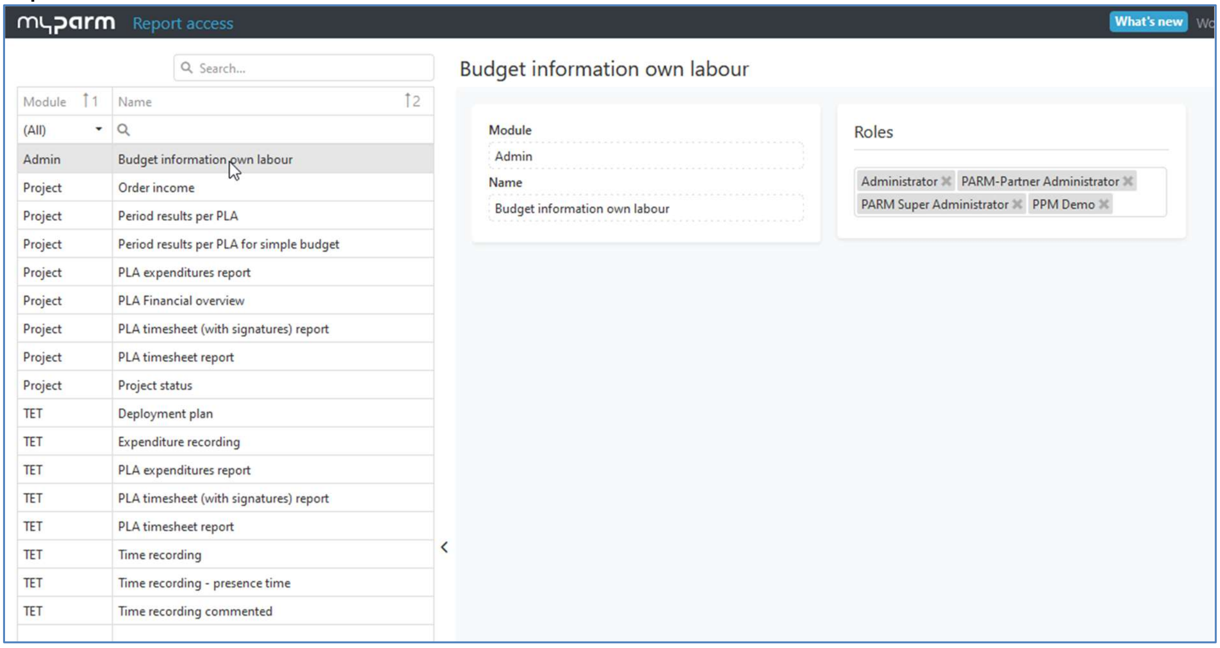
When a new project is created, the "Country" field will now appear under the company fields and can be filled out.



The different processes are given by the system. During the initial set-up of the system, the customer can define where and which approval step should be implemented. He defines if it is an approval step and if it should be possible to add documents to this process step

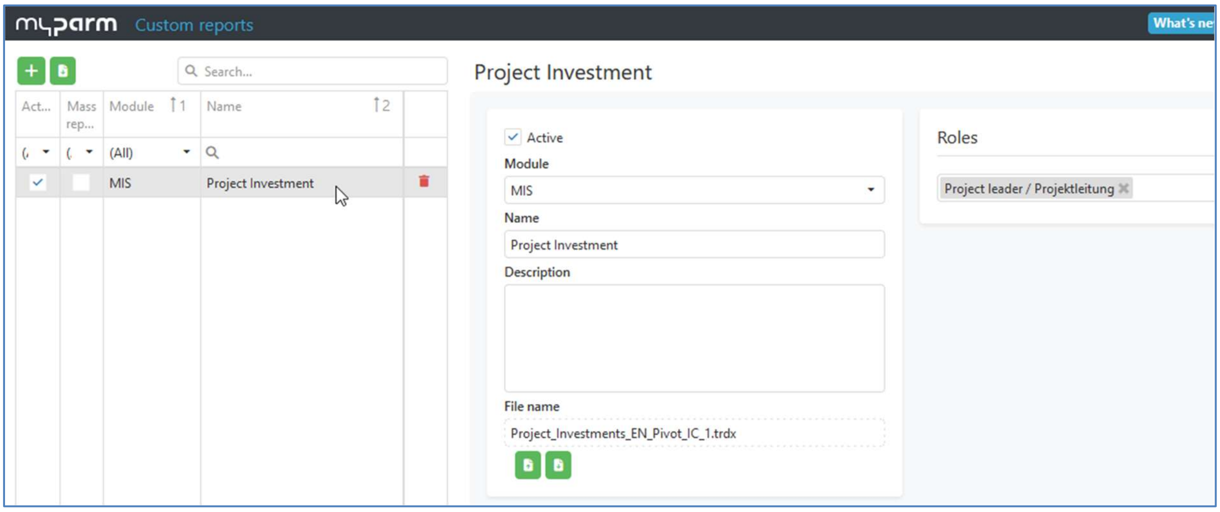
8.5 Report Permissions

Here, additional roles can be assigned to standard reports, allowing them to view the report if needed. For example, newly created roles can be assigned to view a specific report.



8.6 Custom Reports

At present, reports ordered by the client are uploaded here. The report created by Parm AG is stored on the client's server, from where it is uploaded into the application. The filename and the roles that have access to the report are recorded here.



8.7 Definition of the risk fields

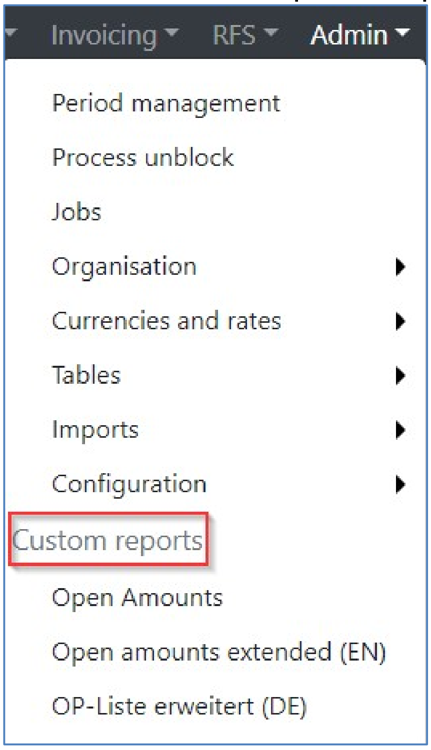
To define which fields are to be filled in the risk section, proceed as follows:

1. Open any project as an administrator in the read view or the edit project process.
2. Go to the Risks tab in the tasks/logs area.
3. Then set the view to Grid. 

4. A line appears in which you can select the “Column Chooser” function.
5. Show/hide the desired columns.
6. Select Save view (disc symbol).
7. The existing fields are now available for all users in myPARM as defined.

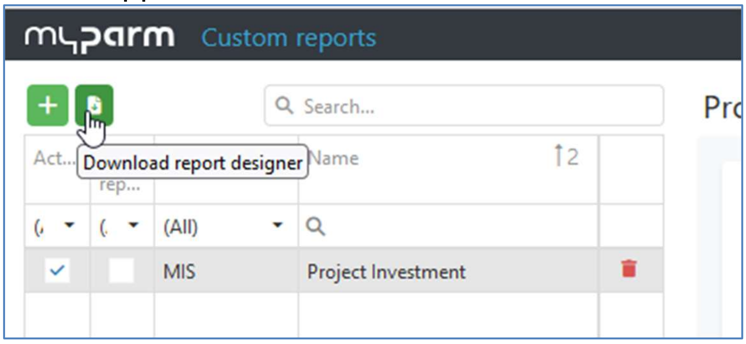
9. Reports

There are individual reports that are only visible to administrators. These are displayed in the «Admin» module under «User-specific reports».



10. Report Designer

myPARM offers a report designer, which allows the customer to create own reports and upload them to the application.



The manual to the report designer can be downloaded at:
https://docs.telerik.com/reporting/designing-reports/report-designer-tools/desktop-designers/standalone-report-designer/overview

11. Other administrative work

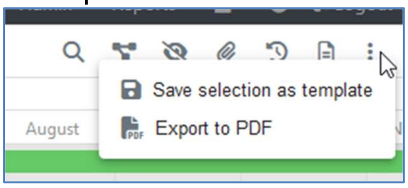
11.1 TET

An administrator can record more than 24 hours per day for another employee. An administrator can enter expenses with a negative amount for another employee. The administrator has to switch to different user and select one of them. If the administrator has to enter more than 24 hours or a negative amount for expenditures for himself, he has to select himself in the “switch to other user”.

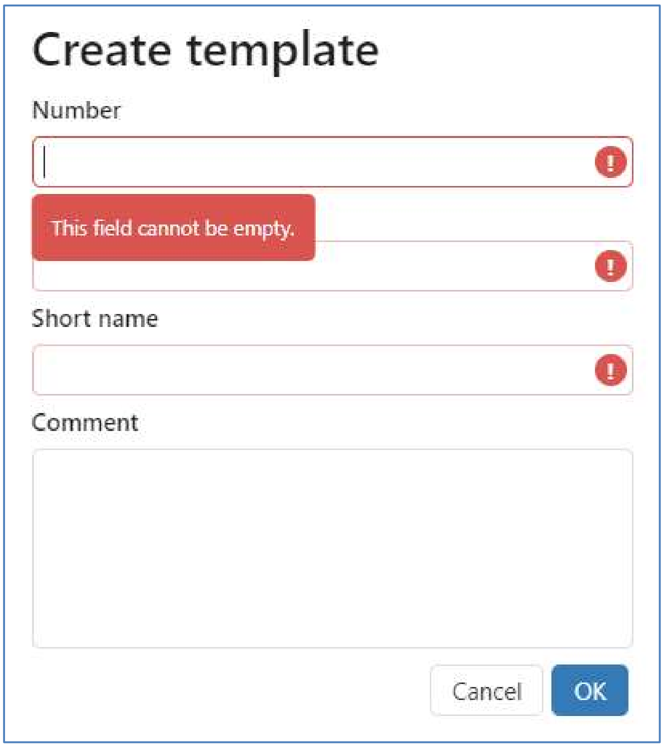
11.2 Task Templates

An administrator can create various templates for projects in the Gantt.

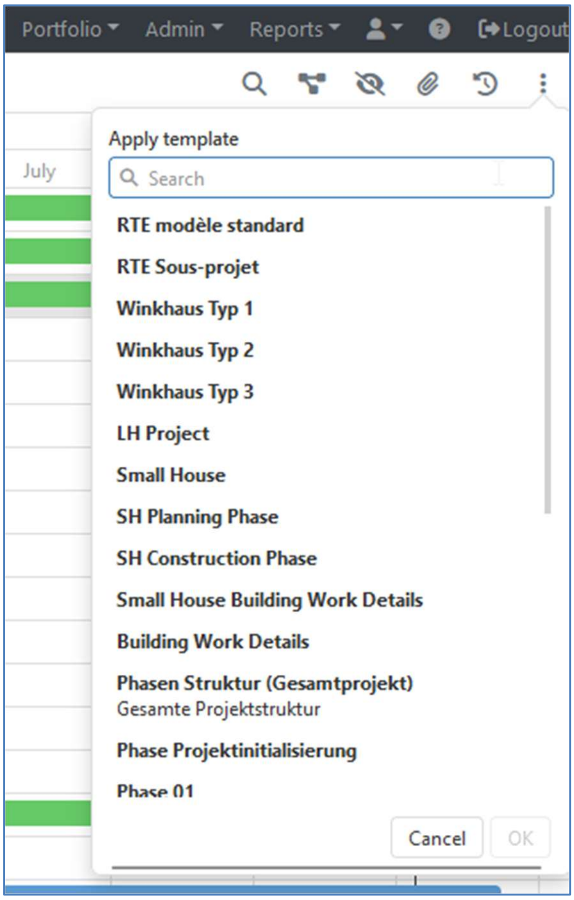
A project is opened in read mode (magnifying glass)  and then the project is selected with the mouse. Individual elements (PLAs) can also be selected and saved as a template.
Then press the three dots on the upper right corner within the project structure:



A window opens in which the number, the name and the abbreviation can be entered. A comment can also be added.



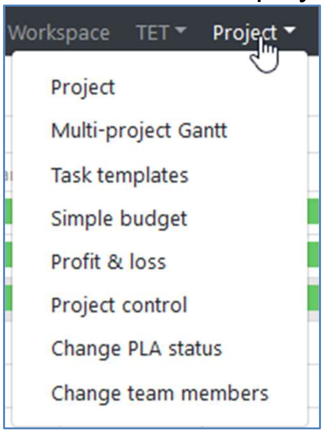
When a new project is created in the project portal, a project template can be selected under the project attributes. The project structure will be automatically adopted in the next step. The elements can be adjusted, modified, or new ones added as needed.
If the template is not defined at the project level in the project attributes, it can be applied within the project structure. Similar to the creation process, the template can be added through the three dots in the "Edit Project Structure" process step.



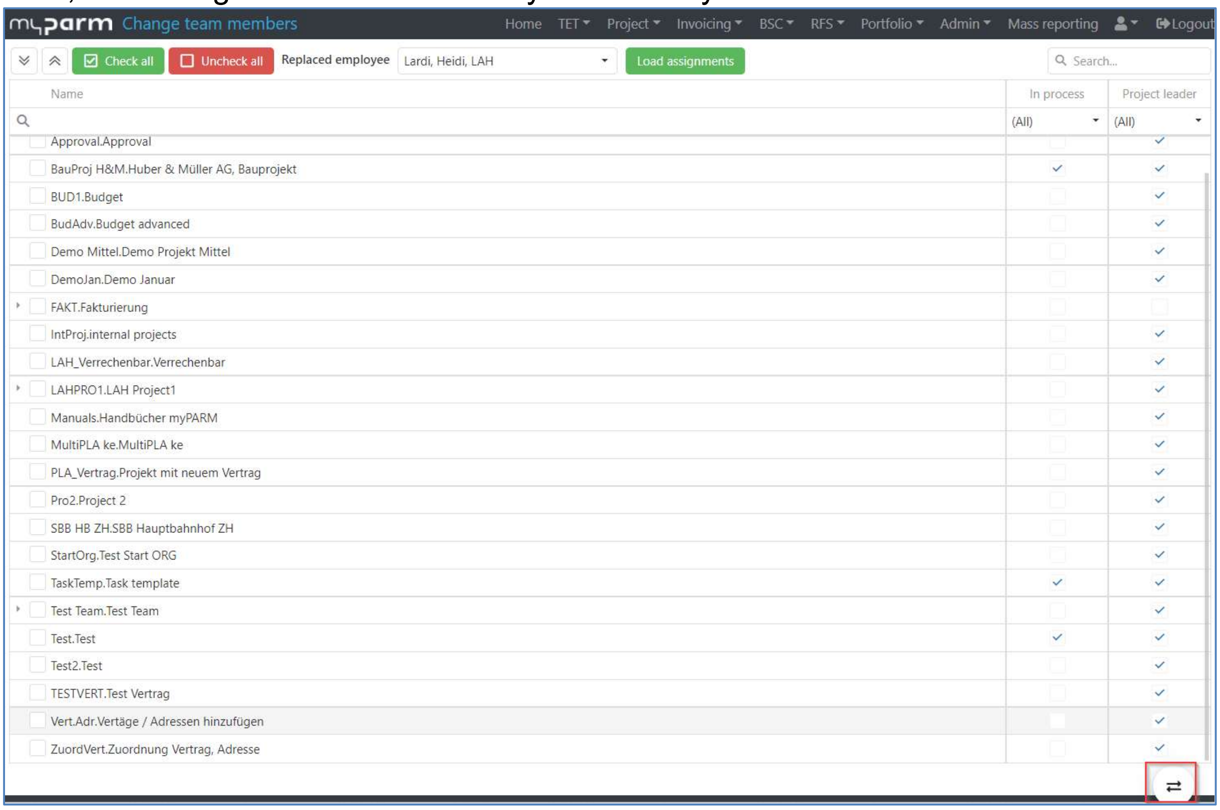
Templates can also be deleted, set to inactive, or edited. This is done in the project portal under "Task Templates." The order of the created templates can also be changed using the slider. 

11.3 Change team members

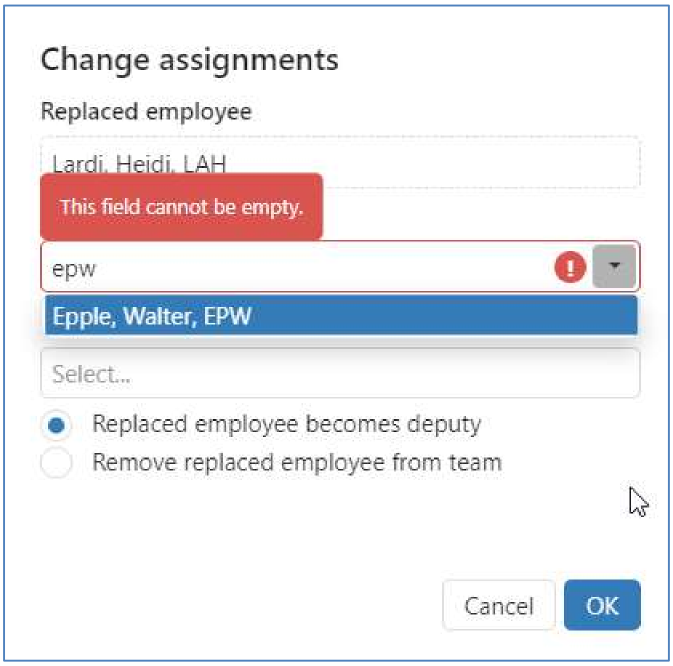
When employees leave the company but are still listed as project leaders in myPARM, or if an existing project leader needs to be replaced by another employee who remains with the company, an administrator can resolve this issue easily. Search for the employee to be replaced and click the "Load Assignment" button.



A list will appear showing all projects/PLAs where the searched employee is listed as the project leader or deputy. By selecting a PLA, you can use the double arrow at the bottom right (left arrow/right arrow) to assign a new project leader. If only the project is displayed without sub-elements, it means that the "Disconnect" option was not used during creation. The team members listed on the project were automatically inherited by sub-elements. When the project leadership is changed on the project level, this change will be automatically inherited by the sub-elements.



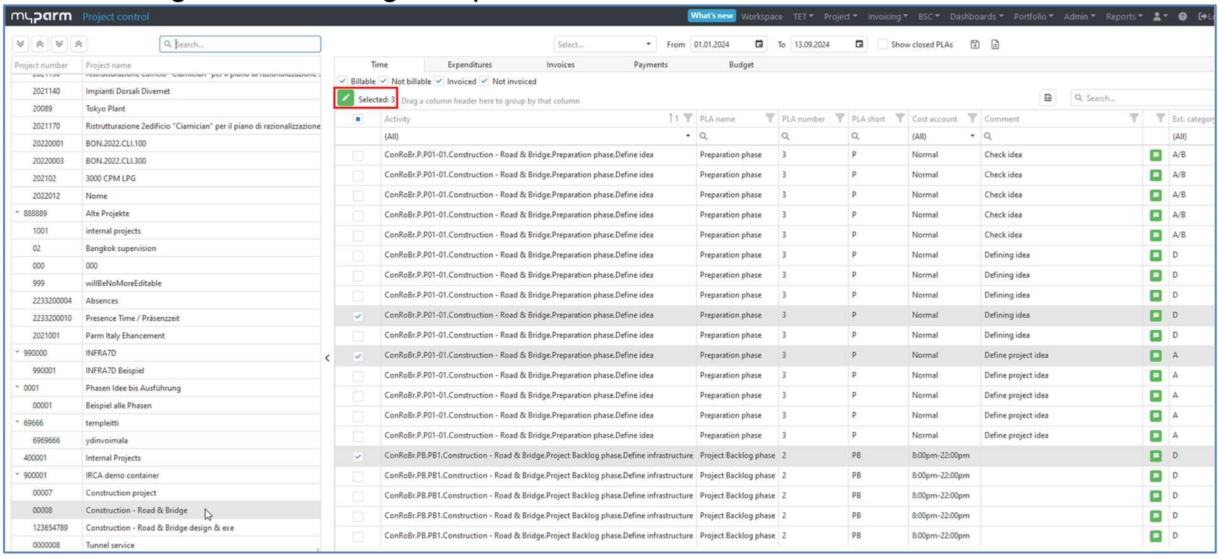
A wizard opens that now helps to replace the existing project manager.



The employee to be replaced is already entered. Now the new employee is selected from the list. In which roles should the "old" employee be replaced. The last point is then whether the existing employee should be used as a deputy or whether he should be removed from the team. No assigned employee will be physically removed. The “old” one gets an end date and the new one a start date next day.

11.4 Project Controlling – Rebooking Hours

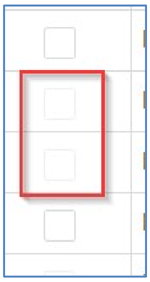
As an administrator, you can rebook hours to a different project, PLA, or activity if necessary. In Project Controlling, search for the project or PLA where the hours need to be rebooked. The hours to be rebooked are marked in the left box. Next to the green pencil, it shows “Selected Entries 3,” indicating that three entries are selected for rebooking. Click on the green pencil.



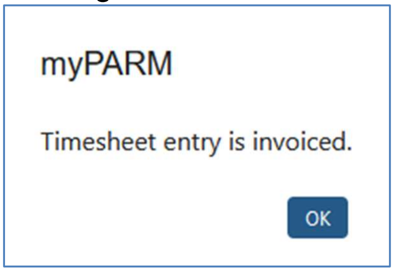
A window opens showing the project structure of the selected entry. If the hours need to be rebooked to a different activity, select the new activity and confirm by clicking “Select” at the bottom right.

If the hours need to be rebooked to a different project, use the small blue arrow to the left “ConRoBr Construction - Road & Bridge” to go up one level. A list of all projects is displayed, from which the appropriate project can be selected.

Hours that have already been invoiced cannot be rebooked. The boxes for such hours are almost invisible.



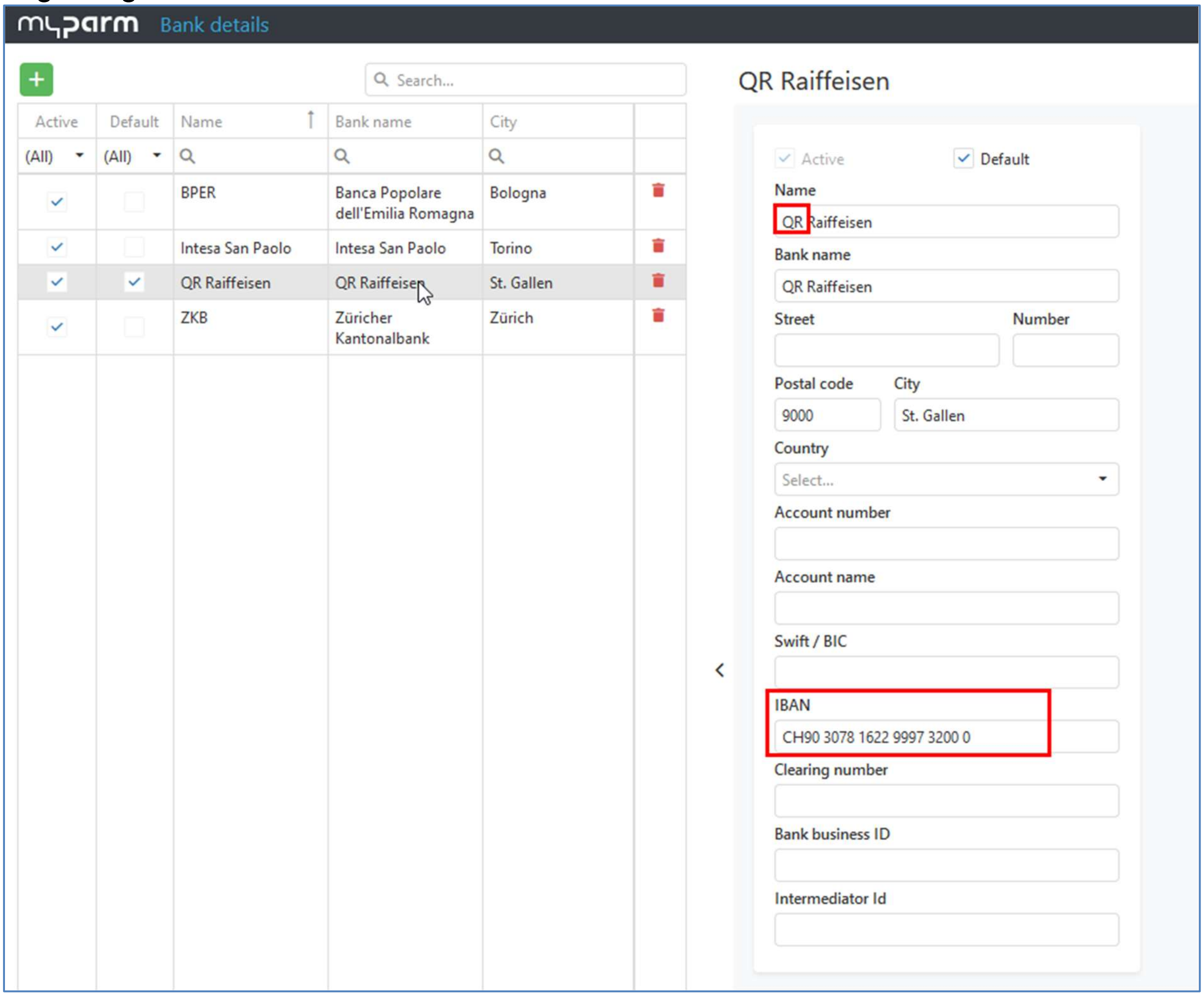
Clicking on such a box will show the message:



Hours in a closed period or in a closed PLA/activity cannot be rebooked. If a travel expense entry is associated with the time entry, it will also be rebooked. If the expense entry should not be rebooked, the time entry must be rebooked in TET. Only the entire time entry can be rebooked. If only parts of it need to be rebooked, this must be done in TET. There is no verification of permissions at the project, PLA, or employee level (PL, OL approval, “Completed by”).

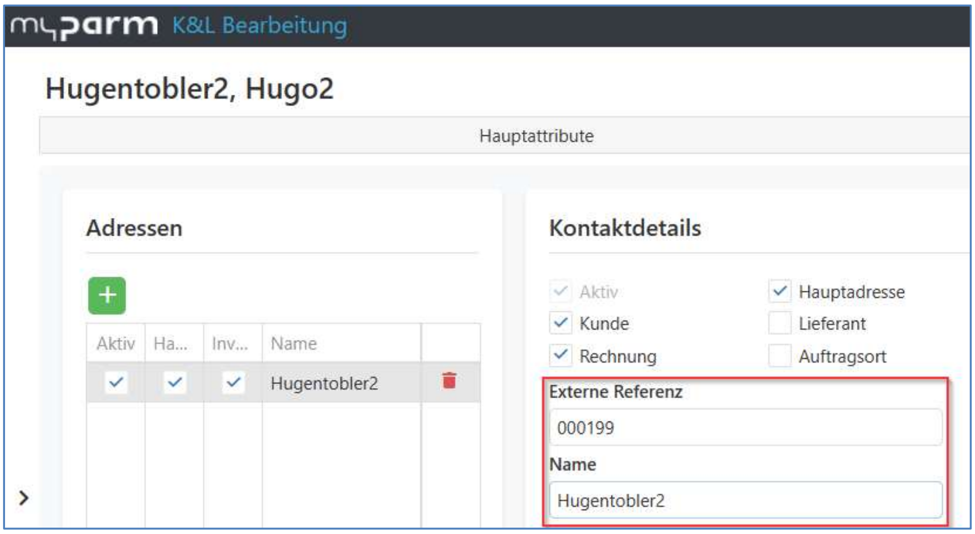
11.5 Setting Up QR Invoices with QR Code

To create a QR invoice with a QR code, the following information is needed:
QR IBAN number, provided by the bank. For each bank account with a QR IBAN number, a new entry is created in “Bank details,” ideally with the label “QR” at the beginning.

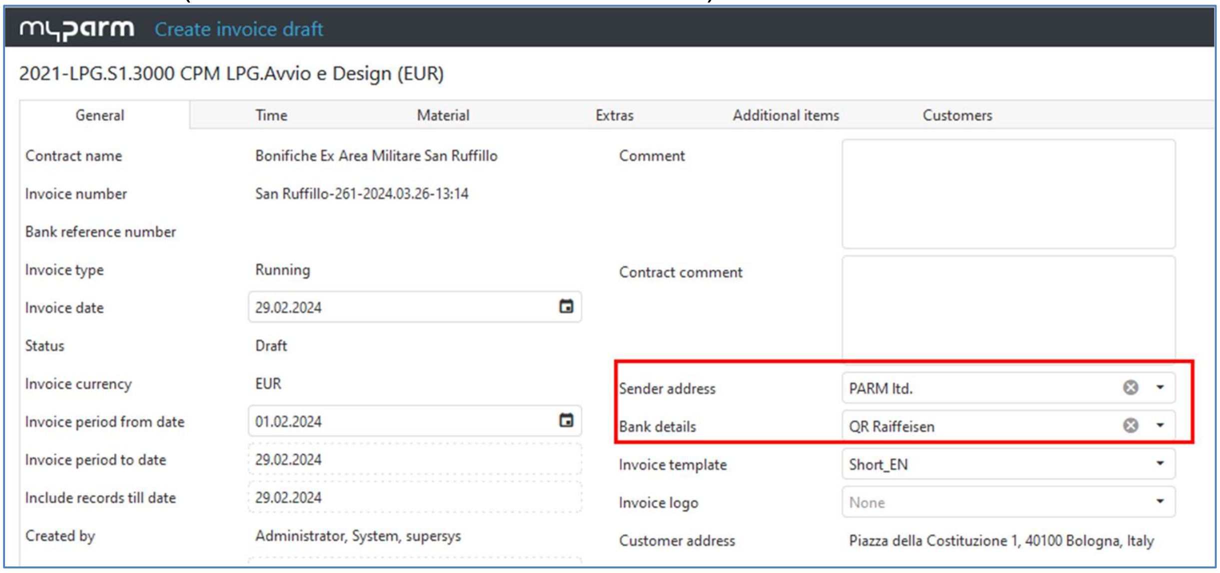


Sender address: A QR customer number is required, which is a 6-digit number in Switzerland, provided by the bank. This is entered in “Sender address” and must be entered twice to allow for invoices without QR information to be created. It is also recommended to label the sender address with the QR customer number.

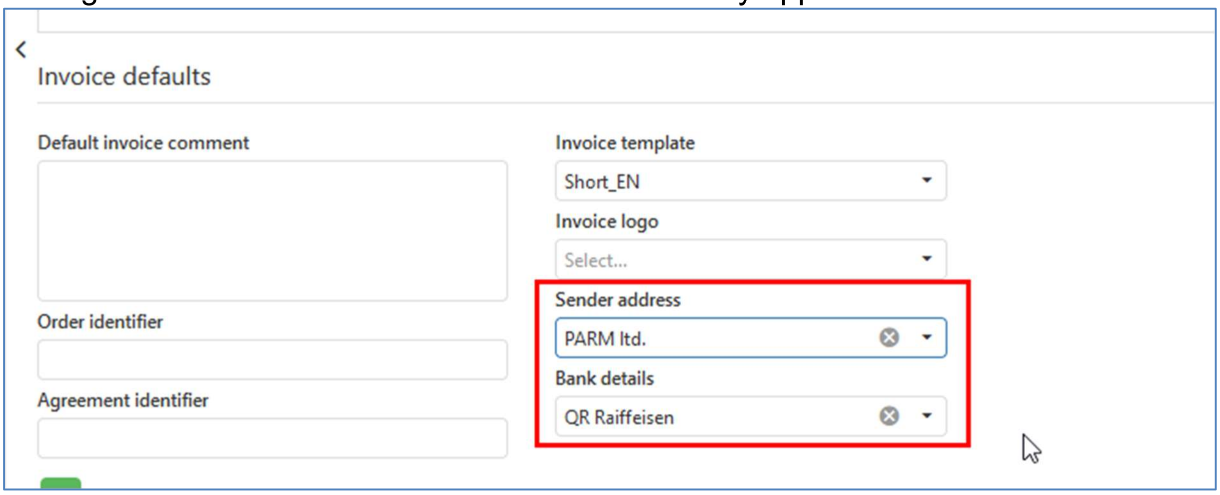
C&S Management → Customer Address: To print the address on the QR code, an “External Reference” and the “Name” field must be completed.



When creating the invoice, the sender address (with QR customer number) and the bank details (bank account with QR IBAN number) are selected.



It is recommended to enter this information directly in the myPARM contract management. This information will then automatically appear in the invoice draft.



The invoice will now print a QR code on a separate page with a reference line. The reference line includes the QR customer number, the customer's external reference, and the invoice number, with zeros in between. Only numbers are allowed for the invoice number. Any text in the original invoice will be omitted.

Receipt

Account / payable to
CH90 3078 1622 9997 3200 0
Parm AG
Fabrikstrasse 28
8000 Zürich

Reference
12 34560 00000 00000 00199 00042

Payable by
Hugentobler2
Bahnhofstrasse 2
8152 Glattbrugg

Currency CHF
Amount 538.50

Payment part

Account / payable to
CH90 3078 1622 9997 3200 0
Parm AG
Fabrikstrasse 28
8000 Zürich

Reference
12 34560 00000 00000 00199 00042

Payable by
Hugentobler2
Bahnhofstrasse 2
8152 Glattbrugg

Currency CHF
Amount 538.50

If an invoice is created without the “External Reference,” QR customer number, and QR IBAN number, a corresponding message will be displayed.

QR Code Erstellungsfehler

Es ist nicht möglich für diesen Kunden einen QR Code zu erstellen:

Kunde: Hugentobler

- Konto: QR Code wird für dieses Land nicht generiert.

PDFs erstellen, auch wenn der QR Code nicht möglich ist?

Nein | Ja

If the message is confirmed with “YES,” the invoice will be created but without the QR code (payment slip). The bank details and account number will be printed directly on the invoice.

	EUR	MwSt.%	MwSt.-Betrag	Total EUR
Pauschal	150.00	7.70	11.55	161.55
Grundbetrag	150.00		11.55	161.55
Total Rechnung, PLA: Verrechenbar , PLA fakturierbar/N/fakturiebar	150.00		11.55	161.55
Total Rechnung	150.00		11.55	**161.55**

Zahlungskonditionen: 30 Tage netto

, Züricher Kantonalbank, 8000, Zürich
IBAN-Code: FR76 3008 7330 8500 0202 2860 132

PARM ltd.

12. Roles / Access rights

myPARM features a multi-level authorization matrix consisting of licenses, roles, and data access rights assigned to users.

12.1 Licenses

The licenses individually assigned to users define which functionalities are available. Assigning a role for viewing dashboards only makes sense if the Business Intelligence license has also been granted.

12.2 Roles

myPARM provides a freely configurable role management system. In addition to the available standard roles, any number of customer-specific roles can be created. This allows permissions to be fully adapted to the needs of myPARM customers.

12.3 Access Rights

Each role is assigned specific access rights that control individual data access. For example: which data is visible to employees (read-only access for views, reports, etc.) or editable.

Furthermore, data access is regulated by assigning employees to corresponding roles within the team management of the data objects.

Examples of project roles, organizational roles, and administrators:

Project Roles

- Project Manager: Employees have access to projects in which they are assigned the role of Project Manager.
- Project Staff: Employees in projects may be granted specific read or editing rights as needed for projects in which they are assigned to a corresponding role.

Organizational Roles

Employees who are assigned a corresponding role within an organizational unit (e.g., team, department, etc.) have access to:

- Project-related data (e.g., reports) for all projects assigned to the respective organizational unit.
- Person-related data (e.g., reports) for all individuals assigned to the respective organizational unit.

Administrators

In addition to extended data access and editing rights (e.g., editing master data), administrators can also be granted permissions for special functionalities, such as:

- Access to role management.
- Access to the integrated report generator and integrated dashboard generator.
- Permission to create additional customer-specific data fields.

By default, the roles are as described below unless customized.

Employee:	Employees who can record hours and expenses on all projects, unless otherwise set. *TET license for all employees*
Project leader	Project managers can see the project portal and the projects in which they are entered as project managers or deputies. Can create budgets for these projects and create all existing project reports. Can create invoices, store sales rates and have access to the K&L portal. *Project management and RFS Object Control license*
CCS leader / Assistant:	Can be entered as a cost centre manager. Sees all projects of the cost centre and can edit them. Can invoice for it, can set selling rates tables.
Approver:	Can approve process steps.
ORG Portal Administrator:	Can be added and edited as a leader in the organizational structure.
Administrator:	Can see and edit everything. *Administrator license*
TET Approver PL:	Can run approvals for time and expense entries on their projects. *TET license*
TET Manager:	Can record hours and expenses for other employees in his organization. *TET license*
TET Admin:	Can record hours and expenses for all other employees. Can rebook hours in the project controlling portal. *TET license*
TET Approver OL:	Can approve hours and expenses for their organizational unit. *TET license*
Contract Manager:	Can see the invoice portal, can approve invoices, can see all contracts. *Project management license*
Invoice Creator:	Can see the invoicing portal, create invoices. *Project management license*
Invoice Admin:	Can see the invoicing portal and issue invoices for all projects. *Project management license*
Financial Manager:	Can approve invoices. *Project management license*
Ad-hoc Invoice Creator:	Can create invoices for his projects *Project management license*
HR Manager:	Can see and edit the HR.
C&S Manager:	Can see the C&S Portal and edit everything

13. Access rights

myPARM has a very flexible authorization concept that can be precisely adapted to the individual needs of our customers. New roles can be created if needed.

Admin	Gives access to admin modules to maintain all system relevant master data. These are period management, calendar, currencies and exchange rates, VAT, categories & rates, cost accounts, etc.
All projects	User can see all projects in project and budget portal regardless of team management assignment. User can start and continue all project processes.
Manage application settings	Gives access to manage application settings.
Duties	Gives access to the myPARM duty management
Budget Portal	Gives access to the Budget Portal.
Can update login	Can update login.
Can use uniFLOW interface	Gives access to uniflow Import and Export.
Invoicing portal	Gives access to the invoicing portal
Has access to BSC	Gives access for non-administrators to BSC module.
Has access to Budget Light	Gives access to use Simple Budget.
Has access to Dashboard	Gives read-only access to Dashboards.
Has access to simple user management	Gives access to simple user management. Is used for standalone usage of RFS, without using further modules. In all other cases the HR portal is used.
Has access to resource mgmt.	Has access to Resource Management.
Has access to RFS	Gives access for non-administrators to RFS, Access to defined RFS modules is handled by access rights.
Human Resources Portal	Gives full access to HR module.
Can do the ad-hoc invoicing	Activates the ad-hoc invoicing process in Invoicing portal
Can see all invoices	Gives access to all invoices in the invoicing portal
Can see all RFS objects	Gives access to see all RFS objects independent of the team management assignment
Can see and edit all TET OL approvals	Gives access to TET OL approval
Can see and edit all TET PL approvals	Gives access to TET PL approval
Can edit bank details	Gives access to edit bank details
Can manage BSC	Gives access to BSC Admin: Gives access to BSC Admin: Set strategies and edit BSC structure, BSC period management.
Can edit Dashboards	Gives access to edit dashboards.
Can import financial data	Gives access to import expenditures and payments
Can create Finvoice	Gives access to use Finvoice Export
Can maintain Profit&Loss	Gives access to the profit&loss portal
Can maintain GRI Reporting structure	Gives access to edit the GRI reporting structure in the BSC (Sustainability)
Can edit custom reports	Gives access to the report designer and the custom reports
Can maintain licenses	Gives access to the license management. Allocation of licenses to employees
Can do mass reporting	Gives access to the Mass reporting module

Can lead organisational unit	Allows to see organizational units in reports where the user is an ORG team member in a role with this access right.
Can edit PLA status	Gives access to Change PLA Status view (requires 'Project Portal' access right).
Can see Project control	Gives access to the project control in the project portal.
Can manage RFS as admin	Gives access to object structure and score map editing.
Can edit RFS objects	Provides access for editing RFS objects. Users who have this right are also listed as assignable in the team management of RFS and BSD objects. Only if the user is assigned can he see the objects.
Can see RFS objects	Gives read-only rights for RFS objects. Users who have this right are also listed as assignable in the team management of RFS and BSD objects. Only if the user is assigned can he see the objects.
Can edit RFS Resource Management	Gives access to RFS Resource Management.
Can edit Sender addresses	Gives access to editing sender addresses for invoicing. These addresses will appear on the invoice.
Can edit translations	Gives access to edit the translations.
Can edit payments	Gives access to edit payments in the payment portal.
Can edit payment conditions	Gives access to edit payment conditions.
Can give time feedback on planned RFS resources	Gives access to RFS time feedback based on RFS resource management
Customer & Supplier portal	Provides access to the C&S Portal. Maintenance of customer and supplier master data.
Messenger	Gives access to myPARM Messenger.
Organisation portal	Provides access to the Organization (ORG) module. Allows maintenance of the organizational structure with all functions, such as approver assignments, definition of number ranges for invoices and expenses, etc.
Partner Admin	This access right gives the user all the rights associated with the 'PARM Partner Administrator' role.
Project portal	Gives access to the project portal. New containers and projects can be created, own projects can be edited.
Maintain roles	Provides access to role management and allows roles and access rights to be maintained.
Standard Selling rates	Gives access to editing the standard selling rates tables.
Super Admin	This access right gives the user all the rights associated with the 'PARM Super Administrator' role.
TET Admin	Provides access to all employees and projects in the TET that exist in the system. User can record, change, delete hours and expenses for all employees.
TET approval OL	Gives access to the TET OL approval and makes the user available during the ORG structure when determining which employee is the responsible TET OL approver, depending on the organizational unit in which the employee is assigned.
TET approval PL	Gives access to the TET PL approver and makes the user available during project creation when determining which employee is the responsible TET PL approver of a project. Projects are only shown in the TET PL Approval if the user has been assigned in Team Management.

TET Manager	User with this permission can be assigned as TET Manager in the ORG structure. The user can record, change and delete hours and expenses for all employees of 'his' ORG structure.
TET Portal	Gives access to TET Portal.
Contract administrator	Users who have this permission can act as contract approvers in the invoicing process.
Workflow management	Gives access to the workflow management and its processing.