Manual

Module Project

Project control

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Project control

Project control is the place where a project leader, PLA leader or controller checks what has happened on a project in a given period: which hours were booked and what they cost, which expenditures were recorded, which invoices were sent and paid, and how the project stands against its approved budget. This manual describes how to open the view, select a project and period, read the five tabs (Time, Expenditures, Invoices, Payments, Budget), work with the grids, start reports and make the two corrections that are possible directly in the view. The last chapters describe the setup an administrator has to do before the view can be used.

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1. Overview

The view answers questions such as:

- Who worked on which activity last month, and how much of it is billable?
- Which expenditures are still waiting to be invoiced?
- How much of the fee has already been invoiced, and what is still open?
- How far is the project through its budget (POC), and what is the work in progress?

Project control is a read-only evaluation with two exceptions: the comment of a time entry can be changed, and time entries can be moved to another activity (see 7. Corrections from Project control). Both are optional functions.

1.1 Basic rules

- Data is loaded for one project at a time. Selecting a project container shows nothing; open the container and select a project.
- All PLAs of the selected project that you are allowed to see are included. There is no PLA selection in the tree; to narrow down to a PLA, filter or group the grid by the PLA columns.
- The **From** / **To** period applies to the Time, Expenditures, Invoices and Payments tabs. The Budget tab ignores the period and always shows the figures from the project start up to today.
- Closed projects are hidden by the default filter in the Status column of the tree. Closed PLAs are hidden until **Show closed PLAs** is ticked.
- Amounts are shown in the system currency; the currency code is part of the column header (for example *Full cost EUR*). Transaction-currency amounts appear in the *Foreign* and *Currency* columns.
- Nothing in the view is recalculated on the fly. Hours, costs and selling amounts are the values stored on the entries when they were booked or rated; budget figures come from

the MIS calculation of the approved budget.

1.2 Product editions

Edition	Tabs	Filters on Time and Expenditures
myPARM (standard)	Time, Expenditures, Invoices, Payments, Budget	Billable, Not billable, Invoiced, Not invoiced
myPARM SaaS Standard	Time, Expenditures, Budget	Billable, Not billable

The edition is fixed per instance. If your installation shows only three tabs, this is the reason, not a missing access right.

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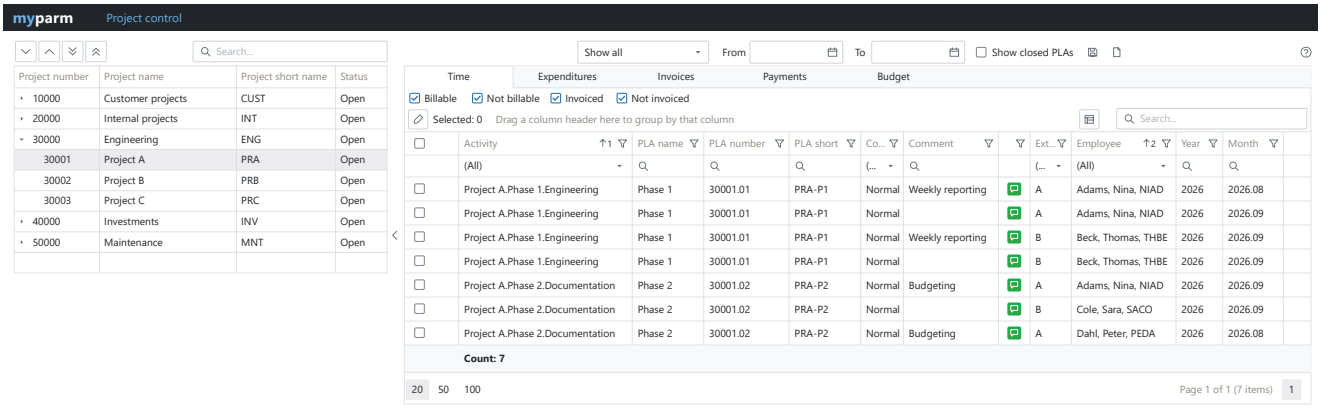
2. Opening the view and selecting a project

1. Open **Project** → **Project control**.
2. In the tree on the left, expand a project container and select a project. The tabs on the right load for that project.
3. To find a project quickly, type part of its number, name or short name in the search field above the tree.



2.1 The project tree

The tree has the columns **Project number**, **Project name**, **Project short name** and **Status** (*Open* or *Closed*). Project containers are always shown as *Open*.

Element above the tree	What it does
Expand / Collapse	Expands or collapses the selected row.
Expand all / Collapse all	Expands or collapses the whole tree.

Element above the tree	What it does
Search field	Filters the tree by the text you type.

When you return to Project control, the project you selected last time is selected again.

2.2 Closed projects

The Status column is pre-filtered to *Open*. To see closed projects, open the header filter of the **Status** column (funnel icon) and tick *Closed*. Closed projects can be evaluated but not edited: no comment change or activity change is possible on their entries.

2.3 Layout of the view

Click the arrow on the bar between the tree and the tabs to hide the tree and get more room for the data; click it again to bring the tree back.

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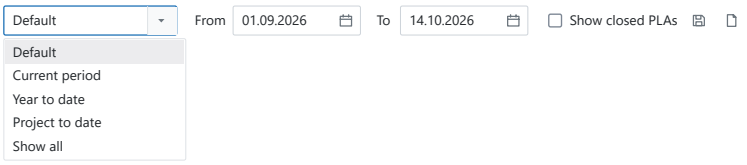
3. Filter bar

The filter bar above the tabs contains the period preset, the **From** and **To** dates, **Show closed PLAs**, the saved-views icon, the **Reports** button and the tour button.



3.1 Period presets

Preset	From	To
Default	First day of the previous accounting period (if no previous period exists, the first day of the current one).	Today.
Current period	First day of the current accounting period.	Last day of the current accounting period.
Year to date	1 January of the current year.	Today.
Project to date	Start date of the selected project.	Today.
Show all	No limit.	No limit.

Notes:

- Accounting period means the periods maintained in the period administration of myPARM (used for period closing). With monthly periods, *Default* covers the previous month up to today. With other period lengths, it follows your periods.
- You can overwrite **From** and **To** at any time. As soon as you type a date, the preset field is cleared.
- **To** includes the whole day (up to 23:59:59).
- The date that is compared with the period differs per tab:

Tab	Date compared with From / To
Time	Date of the time entry
Expenditures	Date of the expenditure
Invoices	Invoice date (for imported or artificial bills: the bill date)
Payments	Payment date
Budget	Not filtered – always from project start up to today

3.2 Show closed PLAs

By default only PLAs with status *Open* or *Temporarily closed* are included. Tick **Show closed PLAs** to also include PLAs with status *Closed* in all tabs and in the reports started from the view. The checkbox does not change the project tree.

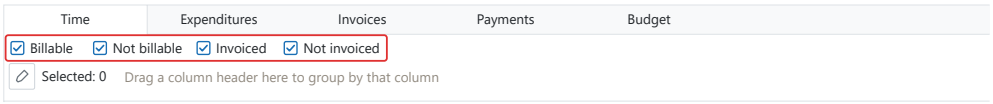
3.3 Billable and invoiced filters

The Time and Expenditures tabs have their own row of checkboxes above the grid. Each tab keeps its own setting.

Checkbox	Rows shown
Billable	Entries flagged as billable
Not billable	Entries not flagged as billable
Invoiced	Entries that are part of an invoice
Not invoiced	Entries not yet part of an invoice

All four are ticked by default. A row is shown when it matches at least one ticked box of each pair. If both boxes of a pair are unticked, the grid is empty. The grid refreshes shortly after you change a checkbox.

An entry counts as invoiced as soon as it has been placed on an invoice; the status of that invoice is not checked. Invoiced entries are always billable.



3.4 Saved views

The icon next to **Show closed PLAs** opens the saved-views panel. A saved view stores the layout of all grids (column order, widths, sorting, grouping, filters). Use it to keep, for example, a "monthly check" layout and a "billing" layout.

3.5 Guided tour

The tour button at the right of the filter bar starts a short walk-through of the view. The tour also starts automatically the first time you open Project control.

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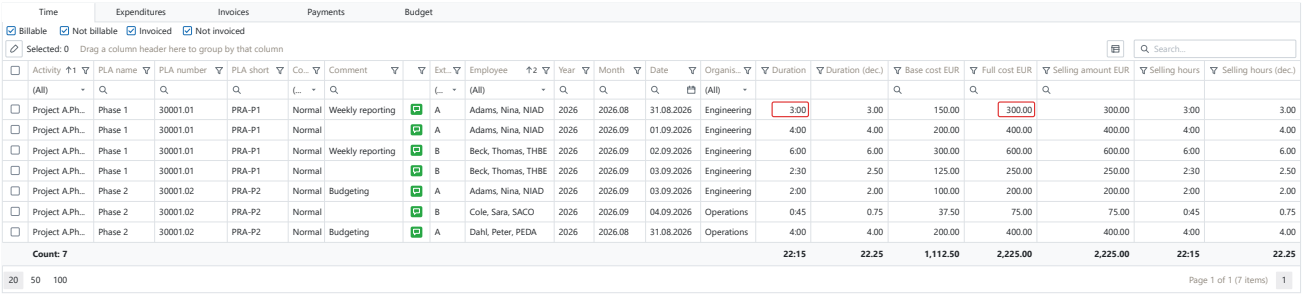
4. The tabs

Each tab is a data grid with search, filter row, header filters, grouping, paging and Excel export (see 5. Working with the grids). Tabs load their data the first time you open them and reload whenever the project, period or a filter changes.

4.1 Time

Lists the time entries of the PLAs of the selected project in the period, one row per entry.



Column	Content
Activity	Full path of the activity the hours were booked on
PLA name, **PLA number**, **PLA short**	The PLA the activity belongs to
Cost account	Cost account of the entry
Comment	Comment of the entry; editable per row if enabled (see 7.1 Change the comment of a time entry)
Ext. category	External rate category of the employee, taken from the employment rate valid on the entry date
Category in SSRT	Employee category in the selling rate table (optional column)

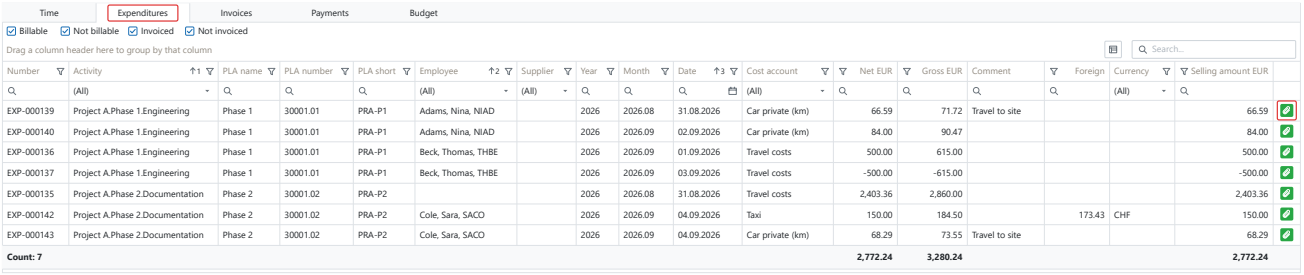
Column	Content
Employee	Who booked the hours
Year, **Month**	Year and year.month of the entry, useful for grouping
Date	Entry date
Organisation unit	Organisation unit of the employee
Duration, **Duration (dec.)**	Hours as h:mm and as decimal
Base cost	Base cost in system currency (optional column)
Full cost	Full internal cost in system currency
Selling amount	Selling value in system currency
Selling hours, **Selling hours (dec.)**	Hours used for selling, as h:mm and decimal

Default sorting: Activity, then Employee.

The grand total row counts the entries and sums *Duration*, *Duration (dec.)*, *Base cost*, *Full cost*, *Selling amount*, *Selling hours* and *Selling hours (dec.)*. When you group, the same totals appear in every group row.

4.2 Expenditures

Lists the expenditures of the PLAs of the project in the period.



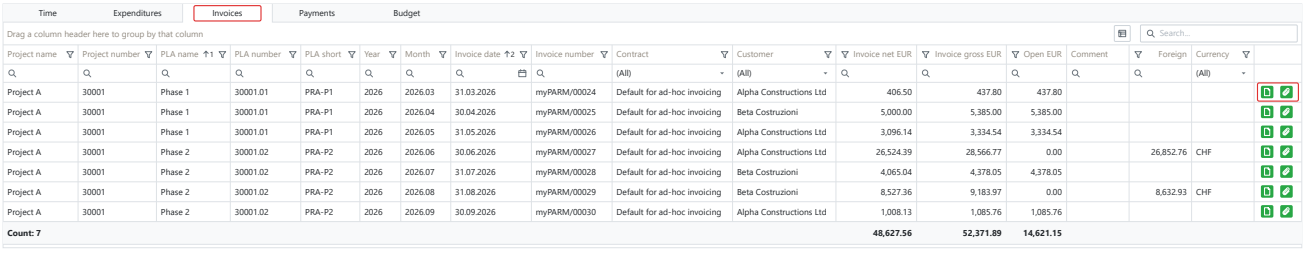
Column	Content
Number	Expenditure number
Activity, **PLA name**, **PLA number**, **PLA short**	Where it was booked
Employee	Who recorded it
Supplier	Supplier, if any
Year, **Month**, **Date**	Expenditure date
Cost account	Cost account
Net, **Gross**	Amounts in system currency
Comment	Comment

Column	Content
Foreign, **Currency**	Gross amount and currency of the transaction, filled only when it differs from the system currency
Selling amount	Selling value in system currency
Documents button	Opens the documents attached to the expenditure

The total row shows the number of rows and the sums of *Net*, *Gross* and *Selling amount*, in the grand total and per group.

4.3 Invoices

Not available in the SaaS Standard edition. Lists the invoices of the project in the period, one row per invoice and PLA: an invoice that covers two PLAs appears twice, each row with the share of that PLA. Imported and artificial bills are included.



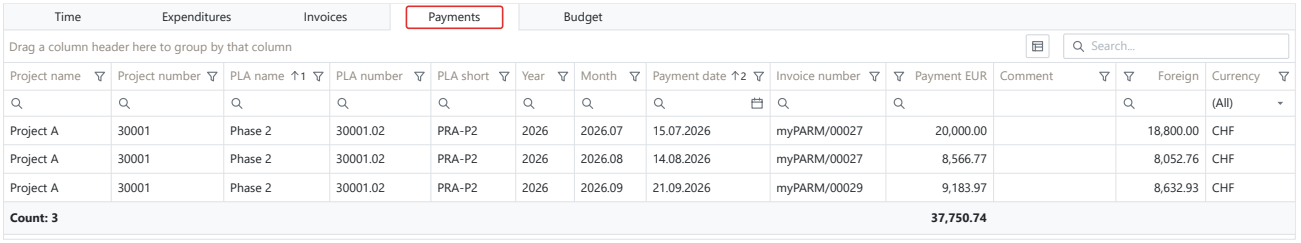
Column	Content
Project name, **Project number**	Project
PLA name, **PLA number**, **PLA short**	PLA share of the invoice
Year, **Month**, **Invoice date**	Invoice date
Invoice number	Invoice number
Contract	Contract the invoice belongs to
Customer	Invoice recipient
Invoice net, **Invoice gross**	Amounts in system currency
Open	Gross amount minus payments received. Shows 0 when the invoice is marked as paid
Comment	Comment
Foreign, **Currency**	Transaction-currency amount and code, if different from the system currency
Show PDF button	Opens the invoice PDF (creates it first if needed). Grey for imported or artificial bills, which have no PDF

Column	Content
Documents button	Opens the documents of the invoice; not available for imported or artificial bills

The total row shows the number of rows and the sums of *Invoice net*, *Invoice gross* and *Open*.

4.4 Payments

Not available in the SaaS Standard edition. Lists the payments received for the invoices of the project in the period, one row per payment and PLA.



Project name	Project number	PLA name	PLA number	PLA short	Year	Month	Payment date	Invoice number	Payment EUR	Comment	Foreign	Currency
												(All)
Project A	30001	Phase 2	30001.02	PRA-P2	2026	2026.07	15.07.2026	myPARM/00027	20,000.00		18,800.00	CHF
Project A	30001	Phase 2	30001.02	PRA-P2	2026	2026.08	14.08.2026	myPARM/00027	8,566.77		8,052.76	CHF
Project A	30001	Phase 2	30001.02	PRA-P2	2026	2026.09	21.09.2026	myPARM/00029	9,183.97		8,632.93	CHF
Count: 3									**37,750.74**			

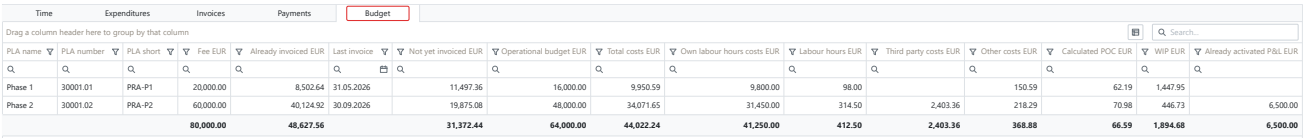
Column	Content
Project name, **Project number**, **PLA name**, **PLA number**, **PLA short**	Project and PLA share
Year, **Month**, **Payment date**	Payment date
Invoice number	Invoice the payment belongs to
Payment	PLA share of the payment in system currency
Comment	Comment
Foreign, **Currency**	Transaction-currency amount and code, if different

The total row shows the number of rows and the sum of *Payment*.

4.5 Budget

Shows one row per PLA with the figures of the currently valid budget compared with the actuals from project start up to today. The **From** / **To** period has no effect on this tab.

The currently valid budget is the approved budget version (final approval status *Accepted*, not historical) with the latest *Valid from* date that is not in the future; if two versions share that date, the one approved last is used. Amounts are converted from the PLA currency to the system currency at the *Valid from* date of the budget.



PLA name	PLA number	PLA short	Fee EUR	Already invoiced EUR	Last invoice	Not yet invoiced EUR	Operational budget EUR	Total costs EUR	Own labour hours costs EUR	Labour hours EUR	Third party costs EUR	Other costs EUR	Calculated POC EUR	WIP EUR	Already activated P&L EUR
Phase 1	30001.01	PRA-P1	20,000.00	8,502.64	31.05.2026	11,497.36	16,000.00	9,950.59	9,800.00	98.00		150.59	62.19	1,447.95	
Phase 2	30001.02	PRA-P2	60,000.00	40,124.92	30.09.2026	19,875.08	48,000.00	34,071.65	31,450.00	314.50	2,403.36	218.29	70.98	446.73	6,500.00
			80,000.00	**48,627.56**		**31,372.44**	**64,000.00**	**44,022.24**	**41,250.00**	**412.50**	**2,403.36**	**368.88**	**66.59**	**1,894.68**	**6,500.00**

Column	Content
PLA name, **PLA number**, **PLA short**	PLA
Fee	Fee of the valid budget
Already invoiced	Net amount invoiced up to today
Last invoice	Date of the last invoice
Not yet invoiced	Fee minus Already invoiced
Operational budget	Own labour + third-party + expenses budget
Total costs	Own and foreign labour at full cost, third-party and other costs up to today
Own labour hours costs	Cost of own labour hours
Labour hours	Labour hours up to today (shown with the currency code in the header although it is hours)
Third party costs	Costs of third-party expenditures
Other costs	Other expenditures
Calculated POC	Percentage of completion, calculated as costs to date divided by budget
WIP	Work in progress: revenue recognised to date (costs plus already activated P&L) minus the amount already invoiced
Already activated P&L	Profit or loss already activated through provisions

All amount columns are summed in the total row; *Calculated POC* is averaged over the PLAs.

Selecting a row on this tab passes that PLA to the **Reports** button, so a PLA-specific report can be started directly (see 6. Reports).

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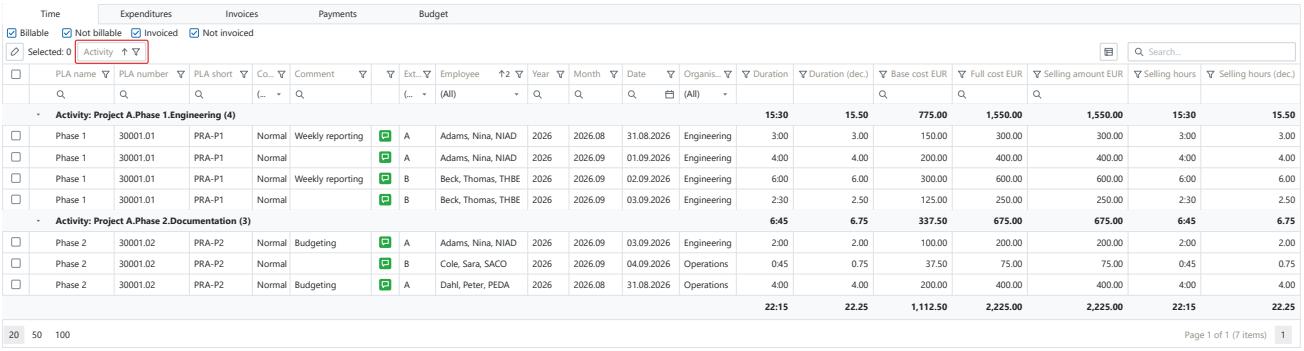
5. Working with the grids

All five grids offer the same tools.

Tool	How
Search	Type in the search box at the top right of the grid; all visible columns are searched.
Filter row	The row directly under the headers: type a value or pick from the list (for example *Cost account*, *Ext. category*).

Tool	How
Header filter	Click the funnel icon in a header, tick the values to show, confirm with **OK**. A set filter turns the funnel dark grey.
Sort	Click a header; click again to reverse. Hold *Shift* to sort by several columns.
Group	Drag a header into the band *Drag a column header here to group by that column*. Grouping by *Activity*, *Employee*, *Year* or *Month* is the usual way to get subtotals. Group rows show the same totals as the grand total row. Groups are collapsed at first; click the arrow at the left of a group row to open it.
Move and resize columns	Drag a header to another position or drag its border.
Paging	Use the pager at the bottom to change the page size or move between pages.
Export	Click the export icon above the grid. The grid is exported to Excel as shown (filters, groups and totals included). The file is named after the tab, for example *Time.xlsx*.
Keep the layout	Save the layout as a saved view (see 3.4 Saved views). The layout of each grid is also kept automatically for your user.



If something is missing, first check the funnels: a dark-grey funnel means a filter is set in that column. Then check the period, the billable / invoiced checkboxes and **Show closed PLAs**.

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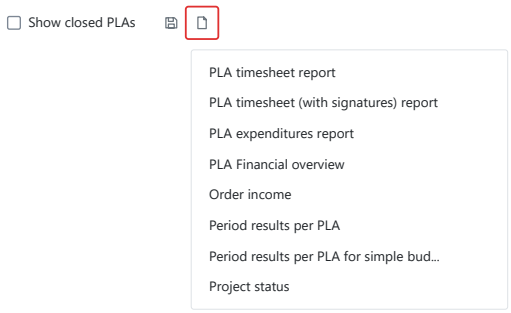
6. Reports

The **Reports** button in the filter bar opens a list of the project reports that are active for your role; choosing a report opens it in the report viewer. The button is enabled only when an active project is selected; otherwise its tooltip reads *Please select a project to create reports*.

The reports receive the selected project, the **From** / **To** period and the **Show closed PLAs** setting as parameters. When a row is selected on the Budget tab, that PLA is passed as well.



Which reports appear depends on the report accesses configured under **Admin → Report accesses**; they are not part of this manual.

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7. Corrections from Project control

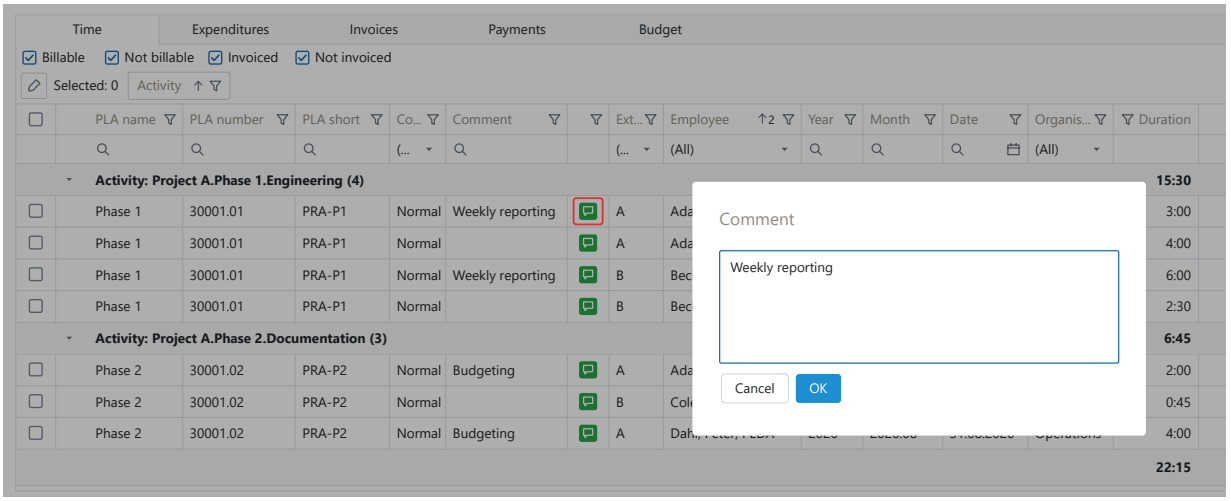
Both corrections need optional functions to be enabled (see 8.3 Optional functions). Changes are saved immediately; there is no save or undo button.

7.1 Change the comment of a time entry

Available when the comment function is enabled. Any user who can open Project control can change comments.

1. On the Time tab, click the green comment icon in the row of the entry, next to the *Comment* column.
2. In the dialog **Comment**, edit the text (up to 1000 characters).
3. Click **OK**. The new comment is saved at once and shown in the *Comment* column.

The comment can be changed even when the entry is invoiced, approved or in a closed period; there is no system check. If the entry was deleted in the meantime, the message *It is not possible to change the comment because the entry has been deleted.* appears and the row disappears.



7.2 Move time entries to another activity

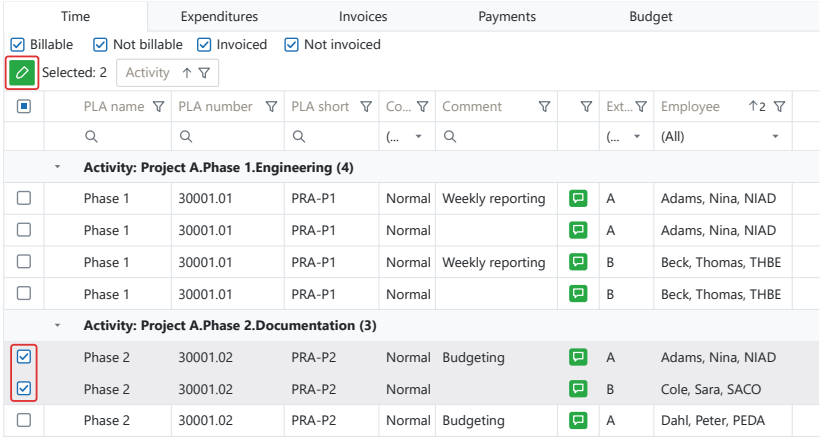
Available when the activity-change function is enabled and your role has the **Admin** access right. The Time tab then shows a checkbox in every row, a counter *Selected: N* and the pencil button **Select activity**.

1. Tick the entries to move. Use the search, filters or grouping first to narrow the list.
2. Click **Select activity**.
3. Pick the target activity in the activity selector and confirm. The entries are rebooked immediately and the grid reloads.

An entry cannot be ticked when one of these applies. Clicking its checkbox shows the reason:

Situation	Message
The project is closed or inactive	*Project is inactive.* / project closed
The entry is already invoiced	*Timesheet entry is invoiced.*
The PLA is not *Open* (temporarily closed or closed)	*PLA is temporarily closed or closed.*
The entry date lies in a closed period	*Timesheet entry is in closed period.*
The entry has linked expenditures that are invoiced	*Timesheet entry has linked expenditures that are invoiced.*

If nothing can be ticked, *No entry can be selected.* is shown; clicking **Select activity** without a selection shows *Please select at least one timesheet entry.*



8. Setup for administrators

8.1 Access right and licence

The menu entry **Project → Project control** is shown only to users whose role includes the access right **Can see Project control view** and whose licence includes the PM module.

Without the access right, the menu entry is not displayed and the page cannot be opened by URL.

1. Open **Admin** → **Roles**.
2. Select the role (project role or employee role) and tick **Can see Project control view**.
3. Save.

Access right	Effect in Project control
Can see Project control view	Opens the view. Granted on a project role, it also makes the project and all its PLAs visible in the tree (see 8.2 Which projects and PLAs a user sees). Granted on a PLA role, it makes that PLA visible.
All projects	Shows every project in the tree, including closed ones, with all PLAs.
Admin	Required in addition for the *Move to another activity* function (see 7.2 Move time entries to another activity).

8.2 Which projects and PLAs a user sees

The tree lists project containers with their projects. A user sees a project if one of the following applies:

The user …	Sees
has **All projects**	every project, including closed ones, with all PLAs.
currently holds a project role with **Can see Project control view** on the project	the project with all its PLAs.
currently holds a PLA role with **Can see Project control view** (for example PLA leader)	the project, but only the PLAs of that role.
is project controller of a cost centre that has PLAs in the project	the project, but only the PLAs of that cost centre.
created the project and no team has been assigned yet	the project.

Rules for PLAs:

- PLAs with status *Not yet opened* are never listed for users with PLA-level access.
- PLAs with status *Temporarily closed* are always listed.
- PLAs with status *Closed* are listed only when **Show closed PLAs** is ticked (see 3.2 Show closed PLAs).
- Only active projects are listed. An inactive project disappears from the tree even if the user has rights on it.

8.3 Optional functions

Four functions of the Time tab are switched on per instance by a Parm administrator. They have no screen in the administration area; contact Parm to have them enabled.

Function in the Time tab	Default
Column **Base cost**	off
Column **Category in SSRT** (employee category in the selling rate table)	off
Comment icon per row to edit the comment of a time entry (see 7.1 Change the comment of a time entry)	off
Row checkboxes and **Select activity** button to move time entries (see 7.2 Move time entries to another activity)	off

One more instance setting changes the columns on every tab: when projects use hashed PLA numbers and short names, the columns *PLA number* and *PLA short* are not shown.

8.4 Setup checklist

- [ ] Role(s) have **Can see Project control view**; users have a PM licence.
- [ ] Project leaders hold a current project role with that right, or PLA leaders hold a PLA role with it.
- [ ] Optional Time-tab functions (base cost, SSRT category, comment editing, activity change) are requested from Parm if needed.
- [ ] Users who should move time entries also have **Admin**.
- [ ] Accounting periods are maintained, because the period presets *Default* and *Current period* are based on them (see 3.1 Period presets).

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9. Frequently asked questions

I selected a project but the tabs stay empty

Check that you selected a project and not a container, that the period covers the entries (try **Show all**), that at least one box of each filter pair is ticked, and that **Show closed PLAs** is ticked if the PLA is closed.

Why does the Budget tab not change when I change the period?

The Budget tab always shows the approved budget against the actuals from project start up to today. Use the Time and Expenditures tabs for period evaluations.

Why do I see fewer PLAs than my colleague?

PLA visibility follows your roles: a project role with *Can see Project control view* shows all PLAs, a PLA role shows only that PLA, and a cost-centre controller sees only the PLAs of that cost centre. Users with *All projects* see everything.

An invoice appears twice

The Invoices tab shows one row per invoice and PLA. Each row carries the share of that PLA. Group by *Invoice number* to see the invoice total.

"Invoiced" is ticked, but the invoice is still a draft

An entry counts as invoiced from the moment it is placed on an invoice. The status of the invoice is not considered.

Why is Ext. category empty for some rows?

The column shows the external rate category of the employment rate of the employee valid on the entry date. It is empty when no employment rate with an external category covered that date.

I cannot tick an entry to move it

The entry is invoiced, in a closed period, on a PLA that is not open, has invoiced expenditures, or the project is closed or inactive. Click the greyed-out checkbox to see the reason.

The Invoices and Payments tabs are missing

Your installation is the SaaS Standard edition, which does not include invoicing. The Invoiced / Not invoiced checkboxes are hidden for the same reason.

The PLA number and PLA short columns are missing

Your installation uses hashed PLA numbers; these columns are hidden on purpose.

The Labour hours and Calculated POC headers show a currency code

The code is appended to every budget column header. Labour hours are hours and POC is a percentage despite the label.

Where do the amounts come from?

Hours, costs and selling amounts are the values stored on the time entries and expenditures when they were booked and rated. Project control does not recalculate them. If a rate was changed afterwards, re-rate the entries in the timesheet or invoicing module first.

10. Glossary

Term	Meaning
PLA	Profit/loss account: the level of a project structure that carries a budget, an invoicing contract and a status (*Not yet opened*, *Open*, *Temporarily closed*, *Closed*).
PM	Project management module licence.
Accounting period	Period defined in the period administration of myPARM (typically a month) and used for period closing; the *Default* and *Current period* presets are based on it.
Closed period	An accounting period that has been closed; entries in it cannot be rebooked.
Billable	Flag on a time entry or expenditure that marks it as chargeable to the customer.
Invoiced	Flag set when the entry has been placed on an invoice. Invoiced entries are always billable.
Artificial / imported bill	An invoice that was not generated by myPARM (manual balance or import); it has no PDF and no documents.
Fee	Agreed revenue of the PLA in the valid budget.
Operational budget	Budgeted own labour, third-party and expense costs.
POC	Percentage of completion: costs to date divided by budget.
WIP	Work in progress: revenue recognised to date minus the amount already invoiced.
Already activated P&L	Profit or loss recognised through provisions.
SSRT	Selling rate table (special selling rates per employee category).
Saved view	A stored layout of all grids of the view that can be recalled later.

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