Manual



Module Administration

Working as an administrator

Parm AG · Bahnhofstrasse 31 · CH-8280 Kreuzlingen
Phone: +41 71 243 10 00 · info@parm.com · parm.com

Updated 10/2026

Contents

1. Period management
1.1 The period list
1.2 Adding a period
1.3 Editing a period
1.4 Changing the period status
1.5 Deleting a period
2. Process unblock
2.1 The list
2.2 Unblocking processes
3. Jobs
3.1 The job history
3.2 Starting a job manually
4. Organisation
4.1 Overview and access
4.2 HR (Human resources)
4.3 Skills (Admin > Tables > Skills)
4.4 Licence assignments
4.5 Automatic worktime balance correction
4.6 Organisational structure
5. Currencies and rates
5.1 Common elements of the screens in this chapter
5.2 Currencies
5.3 VAT
5.4 Cost accounts
5.5 Rates & Categories
6. Standard selling rate tables
6.1 Purpose
6.2 Who can open the screen
6.3 List of tables
6.4 Creating a table
6.5 Copying a table
6.6 Details of a table
6.7 Cost accounts of a table
6.8 Categories of a table
6.9 Employee exceptions of a table
6.10 Where selling rate tables are used
7. Payment condition sets
7.1 Purpose
7.2 Who can open the screen
7.3 List
7.4 Details

7.5 Conditions
7.6 Where payment condition sets are used
8. Tables
8.1 Common behaviour of all table screens
8.2 Calendars
8.3 Cost centres
8.4 Tenants
8.5 Countries
8.6 Project type
8.7 Project phases
8.8 Risk register
8.9 Task summary types
8.10 Finance titles
9. Imports and exports
9.1 Overview
9.2 The import page (common to all imports)
9.3 IN:ERP import
9.4 Bills import
9.5 Expenditures import
9.6 Payments import
9.7 Universal CSV imports (Employees, Projects, Timesheets, Organisation Units, ...)
9.8 Export projects to unicode (Admin > Exports)
10. Configuration: settings, roles, custom fields, translations and help resources
10.1 Where to find these screens
10.2 Settings
10.3 Roles
10.4 Custom fields
10.5 Custom field groups
10.6 Custom fields assignment (opened from Workflows)
10.7 Custom translations
10.8 Help resources
10.9 Appendix: Access rights
10.10 Appendix: Settings available to administrators
11. Configuration: workflows, reports, automation and user menu
11.1 Workflows
11.2 Workflow variants
11.3 Report access
11.4 Custom reports
11.5 Automation
11.6 User settings (person icon > Settings)
11.7 Change password (person icon > Change password)
12. Other administrative work
12.1 Working in TET on behalf of another employee

12.2 Task templates
12.3 Change team members
12.4 Project control – rebooking hours
12.5 QR invoices (Swiss QR bill)
12.6 Definition of the risk fields (Risks tab layout for all users)
12.7 Change PLA status

Working as an administrator

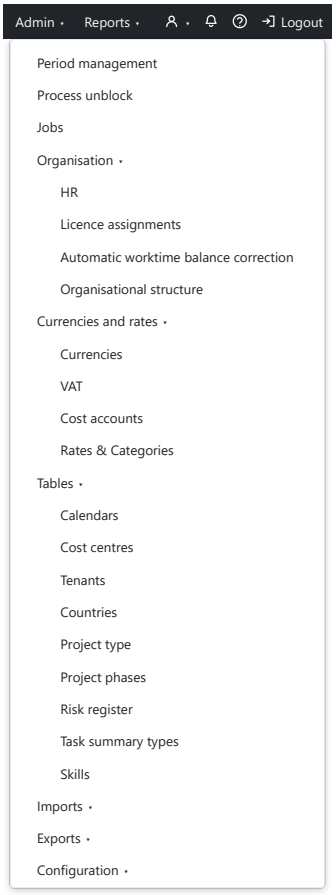
There are tasks in myPARM that can only be performed by an administrator. Most of them are grouped in the **Admin** menu in the main navigation bar. A menu item is shown only if the logged-in user has the access right (and, where applicable, the licence) that belongs to it. If you do not see an item mentioned in this manual, your user account is missing the corresponding access right or licence (see 10.9 Appendix: Access rights).

The **Admin** menu currently contains the following items and submenus:

- Period management
- Process unblock
- Jobs
- Organisation
  - HR
  - Licence assignments
  - Automatic worktime balance correction
  - Organisational structure
- Currencies and rates
  - Currencies
  - VAT
  - Cost accounts
  - Rates & Categories
- Tables
  - Calendars
  - Cost centres
  - Tenants
  - Countries
  - Project type
  - Project phases
  - Risk register
  - Task summary types
  - Skills
  - Finance titles
- Imports
  - IN:ERP import
  - Bills import
  - Expenditures import (standard, Sage and XperLine formats)
  - Payments import (standard and Sage formats)
  - any additional imports activated by a Parm administrator

- Exports
  - Export projects to unicode
- Configuration
  - Settings
  - Roles
  - Custom fields
  - Custom field groups
  - Custom translations
  - Help resources
  - Workflows
  - Workflow variants
  - Report access
  - Custom reports
  - Automation

Two further administrative screens are located in the **Invoicing** menu instead of the Admin menu: **Payment condition sets** and **Standard selling rate tables**. They are described in this manual as well.

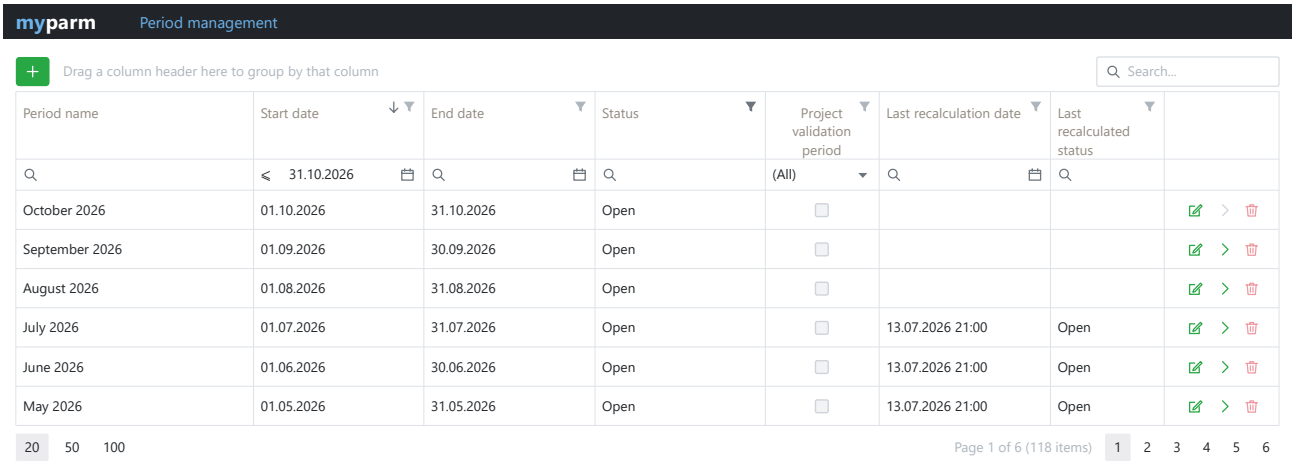


1. Period management

Menu: **Admin** > **Period management**. This item is shown only to users with the access right "Admin" and the Admin licence.

Periods are the accounting months of myPARM. Timesheets, expenditures and cost calculations are assigned to periods, and the period status controls whether the data of that month may still be changed. It is recommended to have periods for at least the whole current year.

If no period covers today's date, every administrator sees the message "The current period required by some views is not defined yet. Please add missing period." after logging in. Users without administrator rights get the message "The current period required by some views is not defined yet. Please contact your administrator." and are logged out again. Add the missing period(s) as described in 1.2 Adding a period.



1.1 The period list

The periods are shown in a grid, sorted by start date with the newest period on top.

- **Period name** – name of the period, e.g. "March 2026".
- **Start date / End date** – first and last day of the period.
- **Status** – "Open", "Temporarily closed" or "Closed".
- **Project validation period** – checkbox. Periods marked here are used by the project validation (budget checks) as reference periods.
- **Last recalculation date** – date and time when the "Recalculate costs" job last processed this period.
- **Last recalculated status** – status the period had when it was last recalculated. A period that was already recalculated as "Closed" is skipped by future recalculation runs.
- **Row buttons** (right-hand column): pencil = edit, arrow = change status, trash = delete.

Grid tools:

- **Green plus button** (toolbar, left) – adds the next period (see 1.2 Adding a period). The button turns grey when no further period can be added.
- **Search box**, **filter row** under the column headers, **header filters** (funnel icon in the column header), **group panel** ("Drag a column header here to group") and the **pager** with page-size selector at the bottom.

- **Default filters:** when the screen opens, the filter row of "Start date" is preset to "less than or equal to the last day of the current month", so future periods are hidden. The header filter of "Status" is preset to "Open" and "Temporarily closed", so closed periods are hidden. Clear or change these filters to see future or closed periods.

1.2 Adding a period

1. Click the green **plus** button above the grid.
2. The new period is created and saved immediately; no form opens. It always follows the most recent period:
   - Start date = the day after the end date of the most recent period (if there is no period yet: tomorrow).
   - End date = one calendar month later, minus one day.
   - Period name = month and year of the end date, e.g. "April 2026". If start and end date fall into different months, the name is "<start month year> - <end month year>".
   - Status = "Open"; "Project validation period" = unticked.
3. Afterwards edit the period if the name or the end date must differ (see 1.3 Editing a period).

If a period cannot be added, an information popup "myPARM" explains why:

- "The maximum date has been reached, no more periods can be added."
- "A period already exists with the name you want to create."

The server also rejects a period that does not start after all existing ones ("New period should start after existing ones.").

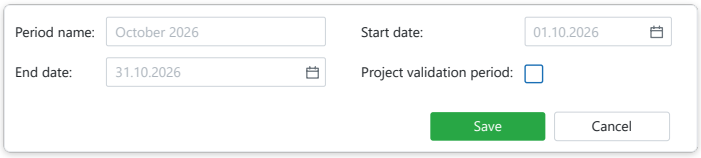
1.3 Editing a period

1. Click the **pencil** in the row. A popup form opens with the fields **Period name**, **End date**, **Start date** and **Project validation period**.
2. Change the values:
   - **Period name** and **End date** can be changed only for the most recent period; for older periods these fields are read-only.
   - **Start date** can be changed only when the list contains exactly one period.
   - **Project validation period** can be changed for every period.
3. Click **Save** in the popup (or **Cancel** to discard).

Validation hints:

- "This field cannot be empty." – name and end date are required.
- "The entered value already exists, but it has to be unique." – the period name must be unique.

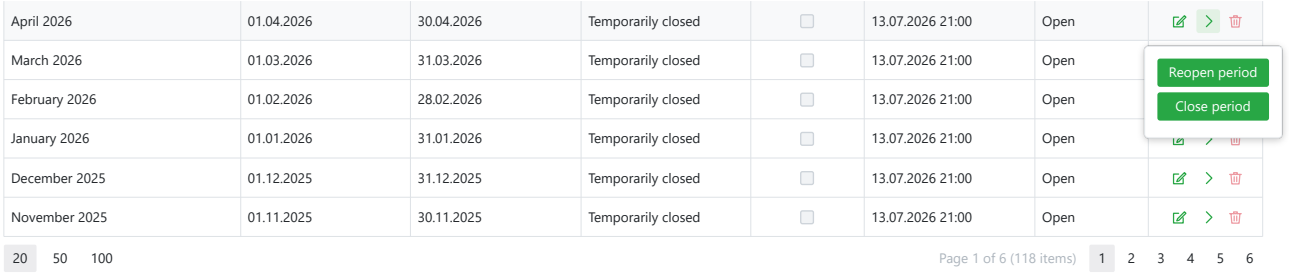
- "The end date must be after the start date."
- If another user has saved the same name in the meantime: "Period name is not unique."



1.4 Changing the period status

The **arrow** button of a row is enabled only when the end date of the period lies in the past and the period is not yet "Closed".

1. Click the **arrow** button. A small popover with action buttons appears:
   - For an **Open** period: **Temporarily close period**.
   - For a **Temporarily closed** period: **Reopen period** and **Close period**.
2. Click the action.



The action is applied to a range of periods, not only to the clicked one:

- **Temporarily close period** – temporarily closes this period and all older periods that are still "Open".
- **Close period** – closes this period and all older periods that are "Temporarily closed". A closed period can never be reopened.
- **Reopen period** – reopens this period and all newer periods that are "Temporarily closed".

If more than one period is affected, a confirmation "Are you sure you want to temporarily close period / close period / reopen period from <first period> to <last period>?" is shown. Confirm with **Yes** or cancel with **No**.

Meaning of the statuses:

- **Open** – all users can enter and change data of this period.
- **Temporarily closed** – the period is closed for normal users; only administrators can still make the necessary corrections. The period can be reopened.
- **Closed** – no changes are possible any more; the period cannot be reopened.

1.5 Deleting a period

Only the most recent period can be deleted; the trash button of all other rows is disabled. Periods must therefore be deleted one by one, starting with the newest. The current period cannot be deleted, even when it is the most recent one.

1. Click the **trash** button of the most recent period.
2. Confirm "Do you really want to delete this item?" with **Yes**.

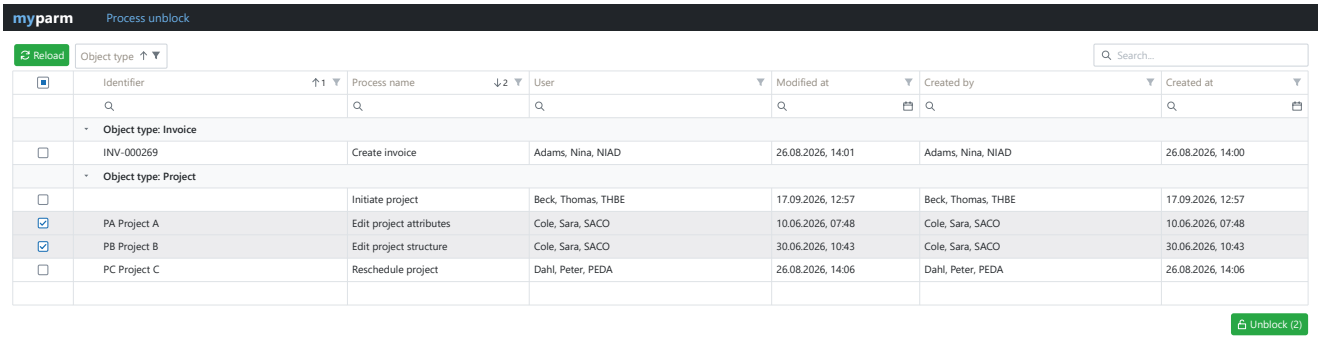
If data has already been booked to the period, the deletion is refused with "This period has already been assigned and cannot be deleted."

---

2. Process unblock

Menu: **Admin** > **Process unblock**. Shown only to users with the access right "Admin" and the Admin licence.

When a user starts a process (for example a project approval, a budget or an invoice workflow) and does not finish it, the object stays locked for that user. This screen lists all such running processes so that an administrator can release them. After the release another user can continue or restart the process.



A process instance is always *Running* (a user is in the process), *Suspended* (no user is in the process), *Aborted* or *Finished*. If a user leaves the process without clicking *Cancel*, the process stays *Running* and is blocked. It can be unblocked by opening the process and clicking *Cancel*, or by an administrator on this screen. The process lifecycle is shown as a diagram in the manual "Processes, Workflow Variants and Custom Fields" (in the help menu: "Manual: Workflows for administrators").

2.1 The list

- **Reload** button (toolbar, left) – reloads the list.
- **Search box**, **filter row**, **header filters**, **group panel** and **pager**.
- The list is grouped by **Object type** by default; click a group row to expand it.
- Checkbox column on the left – selects the processes to unblock. The header checkbox selects all rows on all pages.

Columns:

- **Identifier** – name or number of the object the process belongs to (project, invoice, budget ...).
- **Process name** – name of the process (workflow), e.g. the project approval process or a customer-specific variant.
- **Object type** – "Project", "Project container", "Template", "Budget", "Invoice", "Organisation structure unit", "Period" or "N/A".
- **User** – the user who is currently executing (blocking) the process.
- **Modified at** – date and time of the last change of the process.
- **Created by** – the employee who started the process.
- **Created at** – date and time when the process was started.

2.2 Unblocking processes

1. Tick the checkbox of every process you want to release (use the search box or the filters to find it).
2. Click **Unblock** at the bottom right. The button shows the number of selected rows, e.g. "Unblock (3)", and is green as soon as at least one row is selected. (Ctrl+S triggers the same action.)
3. Released processes disappear from the list. If the blocking user never saved anything in the process, the process is removed completely and the object is free again; otherwise the process is suspended.

If one or more processes could not be released, they stay selected and a popup "myPARM" lists them: "The following processes were not unblocked due to:" followed by one line per process "<Object type>, <Identifier>, <reason>". Possible reasons:

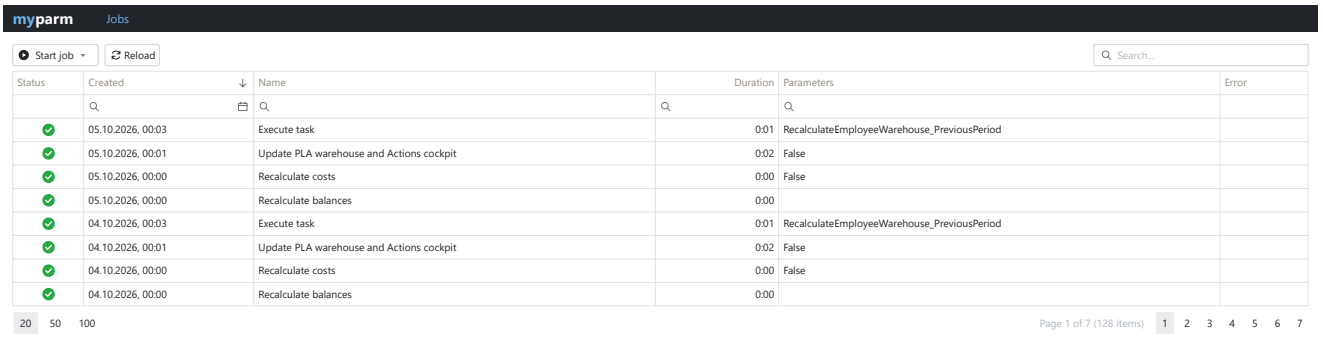
- "Process does not exist anymore." – the process was finished or deleted in the meantime; click **Reload**.
- "Process is not running." – the process is already suspended or finished.

---

3. Jobs

Menu: **Admin** > **Jobs**. Shown only to users with the access right "Admin" and the Admin licence. In the SaaS Standard version the item is visible only to Parm administrators.

Jobs are background operations such as recalculating costs, updating warehouses/cockpits or sending notifications. Most of them run automatically at night (the schedule is set up on the server by Parm). This screen shows whether the jobs ran correctly and allows starting a job manually.



3.1 The job history

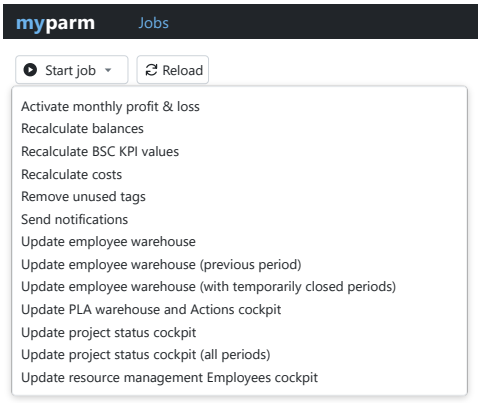
The grid lists all job runs of the **last 30 days**, newest first.

- **Status** – icon:
  - green tick in a circle = completed without error,
  - red warning triangle = completed with an error (see the "Error" column),
  - clock = pending (waiting to be started),
  - rotating cog = executing.
- **Created** – date and time when the job was queued.
- **Name** – job name.
- **Duration** – run time in hours:minutes.
- **Parameters** – parameters the job was started with (for "Recalculate costs": "True" = all periods, "False" = current period plus the 12 previous ones).
- **Error** – error text in red, if the job failed.

Tools: **Search box**, **filter row**, **pager** with page-size selector, and the **Reload** button to refresh the list (the list does not refresh on its own while a job is running).

3.2 Starting a job manually

1. Click **Start job** in the toolbar. A drop-down with all jobs that can be started appears (sorted alphabetically).
2. Click the job. It is queued immediately and appears at the top of the list with the status "pending", then "executing".
3. Click **Reload** from time to time to see the final status.



The whole drop-down is disabled while any job is pending or executing; wait until that job has finished.

Jobs offered in the drop-down (the exact list depends on the installation):

- **Recalculate costs** – recalculates the timesheet (TET) costs and expenditures of the current period and the 12 previous periods that have not yet been recalculated as closed; it also fills the columns "Last recalculation date" / "Last recalculated status" in Period management. (The automatic nightly run, and any weekly full recalculation of all periods, are scheduled on the server.)
- **Recalculate balances** – recalculates the employee time balances.
- **Update PLA warehouse and Actions cockpit** – refreshes the MIS data (PLA warehouse and the Actions cockpit).
- **Import SAP Plan data** – only when the SAP plan import is configured.
- **Send notifications** – sends the pending e-mail notifications; only when an e-mail server (SMTP) is configured.
- **Import Jira issues** – only when the Jira interface is configured.
- Further jobs defined for the installation; each is offered only while it is active:
  - **Activate monthly profit & loss** – offered only when it has been switched on for the installation.
  - **Recalculate BSC KPI values** – active when BSC licences are available.
  - **Remove unused tags**
  - **Update employee warehouse**, **Update employee warehouse (previous period)** and **Update employee warehouse (with temporarily closed periods)**
  - **Update project status cockpit** and **Update project status cockpit (all periods)**
  - **Update resource management Employees cockpit**
  - customer-specific jobs, shown with their caption.

Jobs that Parm has put on the installation's ignore list are not offered.

---

4. Organisation

4.1 Overview and access

The *Organisation* submenu of the *Admin* area groups all screens for maintaining employees, their licences and the company structure:

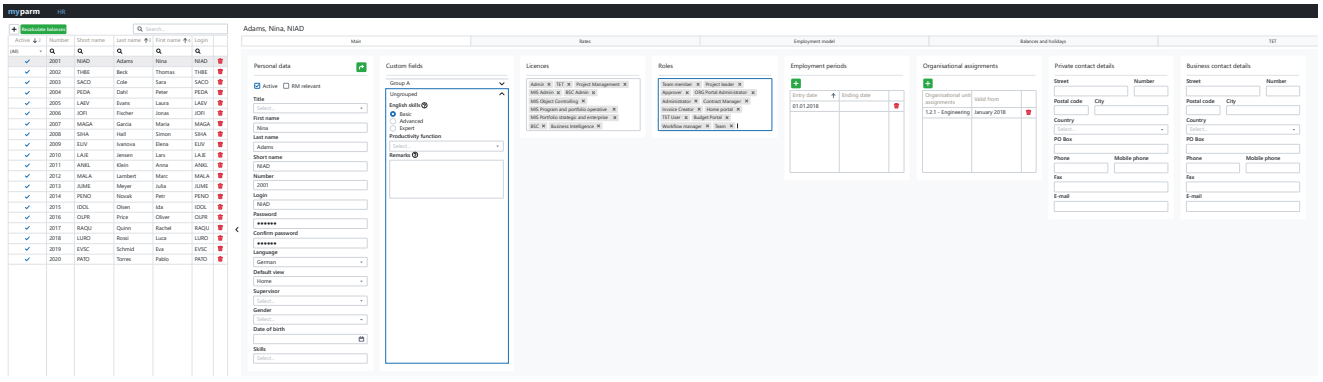
Menu item	Who can open it	Where it is documented
HR	Access right "Human Resources portal"; PM licence	section *HR (Human resources)*

Menu item	Who can open it	Where it is documented
Licence assignments	Access right "Can maintain licence"; Admin licence	section *Licence assignments*
Automatic worktime balance correction	Access right "Human Resources portal"; PM licence; the menu item is shown only when the HR setting "show automatic balance corrections" is switched on	section *Automatic worktime balance correction*
Organisational structure	Access right "Can manage organisation unit" (manage variant) or "Organisation portal" (read-only variant); PM licence	section *Organisational structure*
Skills (Admin > Tables)	Access right "Admin"; Admin licence	section *Skills*

All screens with a *Save* button warn you when you try to leave the page with unsaved changes.

4.2 HR (Human resources)

HR is the employee administration: the employee grid on the left, the detail pane on the right and *Save* at the bottom right. The detail pane is divided into tabs.



Employee list (left pane)

- The grid lists all employees. Columns: **Active**, **Number**, **Short name**, **Last name**, **First name**, **Login**. Active employees are listed before inactive ones, sorted by last name and first name.
- Use the **search box** above the grid or the **filter row** under the column headers to find an employee. The pager at the bottom lets you choose the page size.
- Click a row to load the employee in the detail pane on the right.
- The **green plus** button creates a new employee (see Creating a new employee). The button is grey while you have unsaved changes.

- The **trash icon** at the end of a row deletes the employee. A confirmation "Do you really want to delete employee <first name> <last name>, <login>?" is shown. If the employee already has entries, the message "The employee … cannot be deleted due to existing entries." appears and nothing is deleted.
- The **arrow button** between the two panes collapses or expands the list so that the detail pane gets more room.
- **Recalculate balances**: starts the recalculation of the working time, overtime and holiday balances of **all** employees on the server. While it runs, the button shows a spinner and the text *Recalculating balances*; the screen checks every few seconds whether the job has finished.
- **Active users: <n>**: counter of active users; shown only in the SaaS Standard version.

Creating a new employee

1. Click the **green plus** above the list.
2. The dialog **Entry date** opens. The date is preset to today (or to the first day of the first period that is not permanently closed, if today lies before it). The entry date cannot be earlier than the first day of the first not permanently closed period.
3. Click **OK**. A new employee with one employment period starting on that date is created and shown in the detail pane. Click **Cancel** to abort.
4. Fill in the required fields (marked with a red exclamation mark when empty) and click **Save**.

The new employee automatically receives the *TET* licence if the HR setting "assign TET licence for new employees" is switched on and a free TET licence is available.

Tabs of the detail pane

Tab	Content
Main	Personal data, Custom fields, Licences, Roles, Employment periods, Organisational assignments, Private contact details, Business contact details
Rates	Employment rates (cost and selling rates per validity date)
Employment model	Employment type, worktime calendar, engagement etc. per validity date
Balances and holidays	Balances, Overtime, Balance corrections, Holidays
TET	Limit set assignment, Cost accounts – hidden in the SaaS Standard version

A red error icon next to a tab name tells you that the tab contains invalid data while you are on another tab. *Save* saves all tabs at once.

Main tab – Personal data

The header shows the employee's formatted name. Next to the *Personal data* heading there is a **shortcut button** that opens *Change team members* for this employee.

- **Active** (checkbox): unticking it deactivates the employee. For an existing employee the system first checks the employee's current assignments (projects, organisation units, contracts, supervisor assignments, MIS objects). If there are any, the dialog "The employee has the following assignments. Are you sure you want to deactivate the employee?" lists them. *No* leaves the employee active. Confirming the dialog with *Yes* also **removes all licences** of the employee (when licensing is enabled). Ticking **Active** again for an employee without licences automatically assigns the *TET* licence, if the HR setting "assign TET licence for new employees" is on and a free TET licence is available.
- **RM relevant** (checkbox): marks the employee as relevant for resource management.
- **Authentication type** (radio buttons *myPARM login* / *Single sign-on (SSO)*): shown only when the HR setting "allow users to change password" is switched off. With *myPARM login* the employee logs in with a myPARM password; the password fields become required.
- **Title**: drop-down of the titles table; searchable, can be cleared.
- **First name** (required, max. 20 characters).
- **Last name** (required, max. 50 characters).
- **Short name** (required, max. 20 characters, must be unique).
- **Number** (required, max. 10 characters, must be unique; only digits and dots are allowed – "Only numbers and dots are allowed."). The field can be edited for new employees. For existing employees it is locked when the HR setting "use number as employee identifier" is switched on.
- **Login** (required, max. 256 characters, must be unique; allowed characters: letters, digits, "-", ".", "_", "@", "+"). It can be edited for new employees. For existing employees it can be changed only by users with the access right "Can update login", never for your own account. If the login cannot be changed on the authentication provider, the save is rejected with an explanatory message.
- **Password** and **Confirm password**: shown when the HR setting "allow users to change password" is on, or when the employee uses *myPARM login*. For an existing employee the fields contain a placeholder; clicking into a field clears it so that you can type a new password. Max. 15 characters. Both fields must match ("Password does not match the confirm password."). When the password policy is enforced, hints explain what is missing: minimum length, digits, lowercase letters, uppercase letters, special characters, the minimum number of fulfilled rules, and that the password must not contain personal information (name, short name, number, login).
- **Language** (required): the interface language of the employee; preset to the application language for new employees.
- **Default view**: the screen that opens after login. Shown only to users with the access right "Admin". If this right is revoked while you are editing, the message "The access right

needed to change the user's default view has been revoked. The page is about to be reloaded." appears.

- **Supervisor**: searchable drop-down of all employees; can be cleared.
- **Gender**: *Female* / *Male*; can be cleared.
- **Date of birth**: date field.
- **Skills**: multi-select with checkboxes; tick the skills and confirm with the *OK* button inside the drop-down. The skills come from *Admin* > *Tables* > *Skills*.
- **IC-Team in**: multi-select of inter-company partner instances. Shown only when the inter-company interface is enabled.

Main tab – Custom fields

Shown when custom fields are defined for employees (not in the SaaS Standard version). The box shows the custom fields in two columns; for new employees the default values are applied. Errors are indicated on the field itself.

Main tab – Licences

Shown when the HR setting "enable licensing" is on. Not shown in the SaaS Standard version.

- Multi-select with checkboxes; confirm with *OK* inside the drop-down. Possible entries (depending on the purchased licences): *Admin*, *Business Intelligence*, *BSC*, *BSC Admin*, *MIS Admin*, *MIS Object Controlling*, *MIS Portfolio strategic and enterprise*, *MIS Program and portfolio operative*, *Project Management*, *TET*.
- Licences without a free seat are greyed out and cannot be selected.
- *Project Management* requires *TET*: selecting *Project Management* automatically adds *TET* (if a seat is free); removing *TET* automatically removes *Project Management*.

Main tab – Roles

Multi-select with checkboxes of all roles defined under *Admin* > *Configuration* > *Roles*. Tick the roles and confirm with *OK* inside the drop-down. The selected roles are shown as tags; click the "x" of a tag to remove it.
Roles with a higher security level than your own are not shown in the list (see 10.3 Roles for the security levels).

Main tab – Employment periods

Grid with the columns **Entry date** and **Ending date**; both are edited directly in the cell.

- **Green plus** adds a new period: the dialog **Entry date / Ending date** opens with the start date preset to the day after the last period. The previous open period automatically receives the day before the new entry date as ending date. The plus is grey (and shows an explanation when clicked) if the existing periods still contain errors, if a period already

starts in the future ("Only one employment period can start in the future."), or if a period starting today has no ending date.

- **Trash icon** deletes a period. A period cannot be deleted if it is the last one, if it originally started today or in the past, if it originally started in a closed period, or if it contains TET entries of the employee. The dialog "Cannot delete employment period" lists the reason(s).
- Validation rules shown as hints or in the error icon next to the plus: entry date required; entry date on or after the first day of the first not permanently closed period; entry date on or before the ending date; entry date not after the employee's first TET entry and ending date not before the last TET entry; entry and ending dates unique; only one open ending date; periods must not overlap; new periods cannot start before existing ones. Dates that lie in a closed period are read-only.

Main tab – Organisational assignments

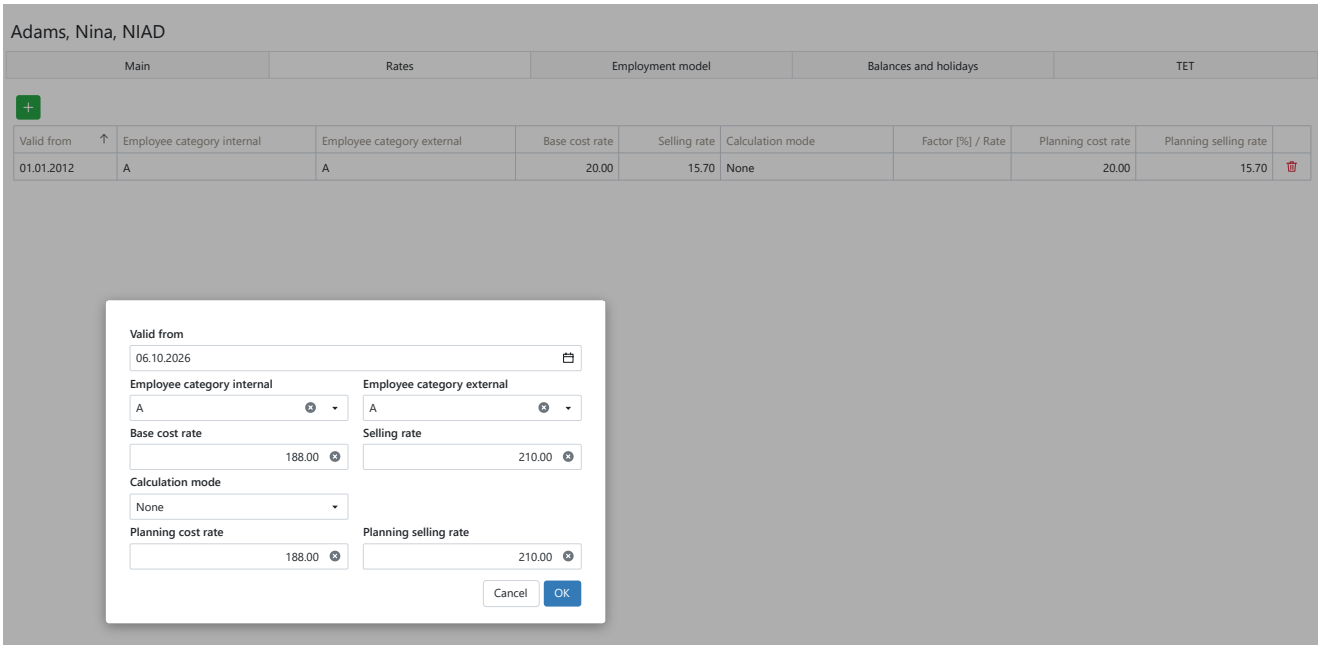
Not shown in the SaaS Standard version (there the employee is assigned automatically to the single organisation unit).

- Grid with the columns **Organisational unit assignments** (the organisation unit) and **Valid from** (an accounting period). Both cells can be edited directly.
- **Green plus** (active only when the employee has at least one employment period) opens a dialog with the fields *Organisational unit assignments* (drop-down of assignable units; preselected if only one exists) and *Valid from* (period). *OK* adds the row.
- Rules: only one assignment per period ("Other assigment is assigned to chosen period."); the selected unit must be active ("The selected organisation unit is not active."); the entry date of the employee must not lie before the first assignment period.
- **Trash icon**: the last assignment cannot be deleted ("Cannot delete the last existing organisation assignment."), nor an assignment in a closed period.

Main tab – Private and business contact details

Two identical address boxes (Street, Number, Postal code, City, Country, PO Box, Phone, Mobile phone, Fax, E-mail) – one for the private, one for the business address.

Rates tab



The grid lists the employment rates of the employee, sorted by validity date. All cells can be edited directly, except in rows whose *Valid from* lies in a closed period (these rows are read-only and cannot be deleted).

Columns:

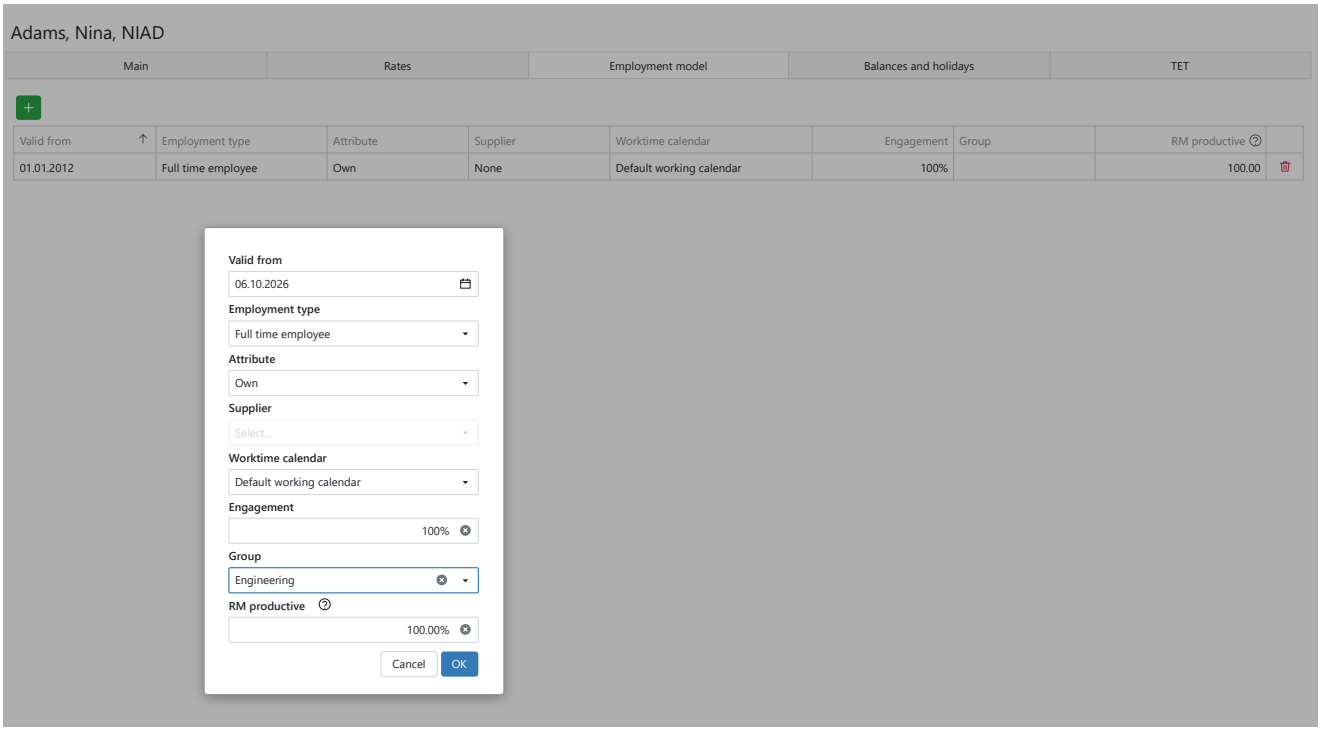
- **Valid from** (required; not earlier than the first day of the first not permanently closed period).
- **Employee category internal** (required) and **Employee category external** (required): tree drop-downs of the rate categories; only active, employee-relevant categories can be selected.
- **Base cost rate** (required), **Selling rate** (required).
- **Calculation mode**: *None*, *Use specific overhead factor* or *Use calculatory full cost rate*.
- **Factor [%] / Rate**: depending on the calculation mode either the specific overhead factor (0 to 9999.99 – "Specific overhead factor must be greater than or equal to 0 and smaller than or equal to 9999.99.") or the calculatory full cost rate. The cell is locked when the calculation mode is *None*.
- **Planning cost rate** (required), **Planning selling rate** (required).

Toolbar:

- **Green plus** (active only when the employee has an employment period) opens the dialog **Add rate** with the same fields (*Valid from*, *Employee category internal*, *Employee category external*, *Base cost rate*, *Selling rate*, *Calculation mode*, *Use specific overhead factor* or *Calculatory full cost rate* depending on the mode, *Planning cost rate*, *Planning selling rate*). When you choose the internal employee category, the rates that are stored for that category on the *Valid from* date are filled in automatically; values you have typed yourself are kept. *Valid from* must be unique and is preset to the day after the last rate (or the entry date).

- **Error icon** next to the plus lists collection errors, e.g. "At least one employment rate is required.", "Valid from date is the same as in other employment rate.", "No valid from date is same or before first employment period start date.".
- **Trash icon**: the last rate cannot be deleted ("Cannot delete the last existing employment rate."); rates in a closed period cannot be deleted.

Employment model tab



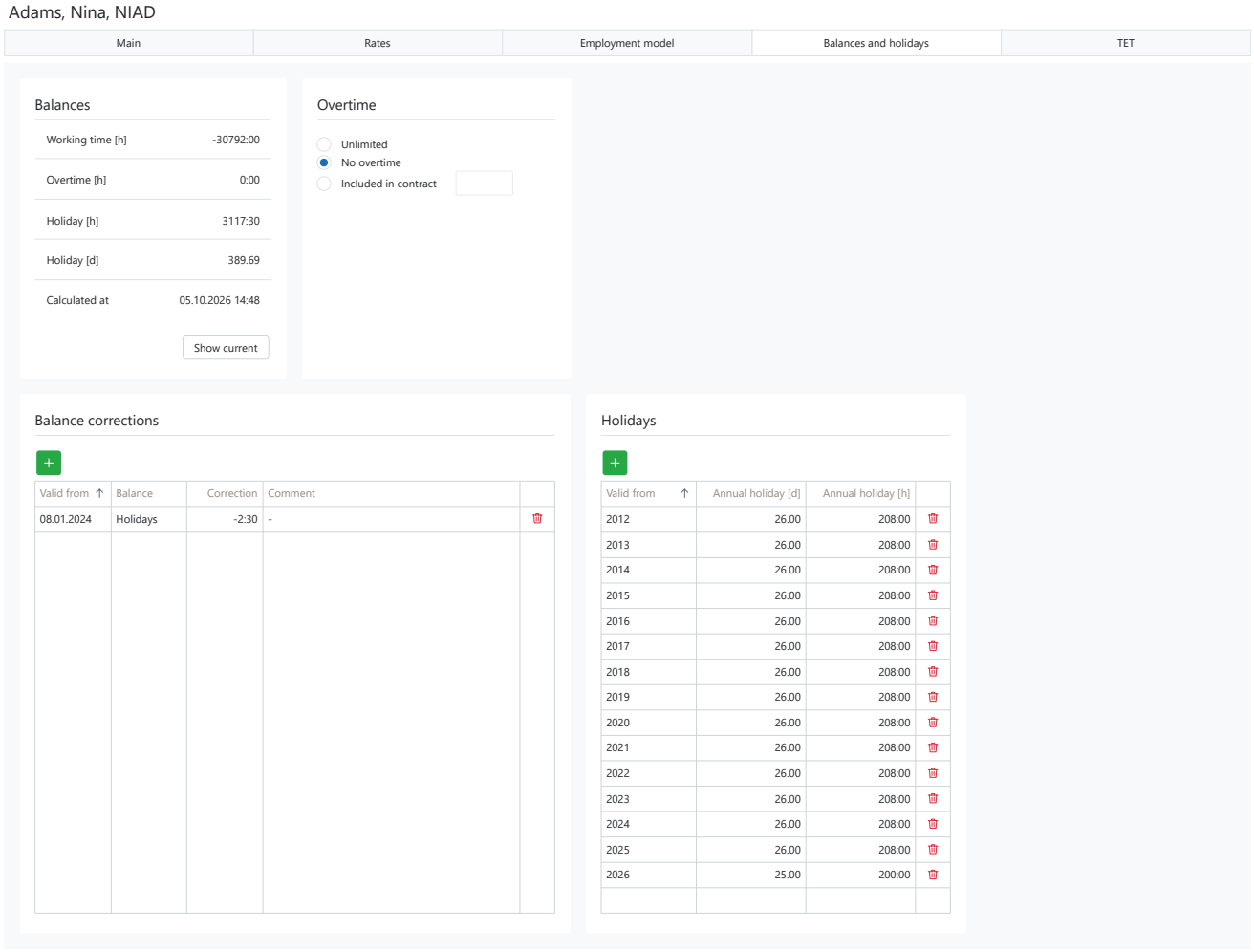
The grid lists the employment models, sorted by validity date. Rows in closed periods are read-only.

Columns:

- **Valid from** (required; not in a closed period; unique).
- **Employment type** (required): *Apprentice*, *Full time employee*, *Hourly paid employee*, *Freelancer*, *Trainee*.
- **Attribute** (required): *Own* or *Foreign*.
- **Supplier**: customer/supplier of the employee; can be set only when the attribute is *Foreign*.
- **Worktime calendar** (required): the calendar that defines the daily working time (preselected if only one exists).
- **Engagement** (required): employment percentage, 0 to 250 % ("Engagement value must be between 0 and 250."). Use a new model with a new *Valid from* date when the percentage changes.
- **Group**: HR group; can be cleared.
- **RM productive**: percentage between -999.99 and 999.99 that defines the availability for projects in resource management. The tooltip icon in the header explains the calculation.

Toolbar: **green plus** (only with an employment period) opens a dialog with the same fields; **error icon** shows collection errors ("Required fields are missing in employment model.", "Valid from date must be unique"); **trash icon** – the last model and models in closed periods cannot be deleted ("Cannot delete employment model").

Balances and holidays tab



Balances box (read-only values):

- **Working time [h]**, **Overtime [h]**, **Holiday [h]**, **Holiday [d]**, **Calculated at** (date and time of the last calculation).
- **Show current**: recalculates and displays the current balances of this employee immediately. The button is grey and shows an explanation if it cannot calculate: "You need to save changes in order to be able to calculate current balances." or "Cannot calculate current balances for user without employment model."

Overtime box (hidden in the SaaS Standard version):

- Radio buttons **Unlimited**, **No overtime**, **Included in contract**.
- With *Included in contract* the time box next to the option becomes active and is required: enter the number of hours (hh:mm) that are included in the contract.

Balance corrections box:

- Grid with the columns **Valid from**, **Balance** (*Working time*, *Overtime*, *Holidays*), **Correction** (hh:mm, negative values allowed, range -9999:59 to 9999:59) and **Comment**. Cells can be edited directly, except in closed periods.
- **Green plus** (only with an employment period) opens a dialog with *Valid from*, *Balance*, *Correction* and *Comment* (max. 1000 characters).
- **Trash icon**: corrections in a closed period cannot be deleted ("Cannot delete balance correction within a closed period.").

Holidays box:

- Grid with the columns **Valid from** (year), **Annual holiday [d]** (0 to 366) and **Annual holiday [h]** (0 to 8784 hours). When you change the days, the hours are recalculated from the daily working time and engagement of the employee's current employment model, and vice versa.
- **Green plus** (only with an employment period) opens a dialog with *Valid from* (year picker), *Annual holiday [d]* and *Annual holiday [h]*.
- One entry per year; entries in closed periods cannot be deleted ("Cannot delete employee holidays within a closed period.").

TET tab

Hidden in the SaaS Standard version.

Limit set assignment box:

- Grid with the columns **Valid from** and **Limit set** (the worktime limit sets defined in the TET administration).
- **Green plus** (only with an employment period) opens a dialog with *Valid from* and *Limit set* (preselected if only one exists).
- Limit sets in a closed period cannot be deleted ("Cannot delete limit set within a closed period.").

Cost accounts box:

- Tree of the cost account groups *Time* and *Material* with their cost accounts; group rows are marked with a "Group" letter icon, accounts with an "Account" icon. Column **Attribute** shows *Own*, *Foreign* or *All*.
- **Expand all** / **Collapse all** buttons and a search box above the tree.
- Tick the cost accounts (ticking a group ticks all accounts below it). The selection restricts the cost accounts available to this employee in TET.

Saving and deleting

- **Save** (bottom right) saves all tabs. If any tab is invalid, a "wrong values" message is shown and the invalid tab is marked with a red icon.

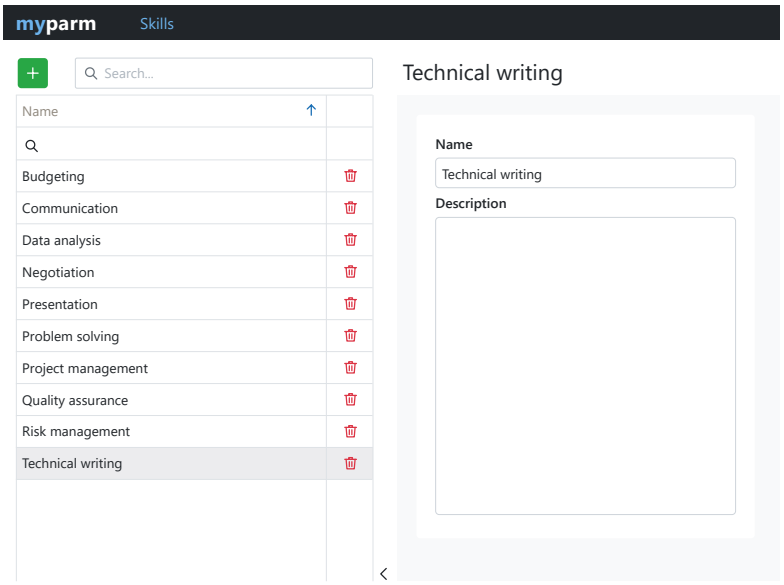
- **Delete**: use the trash icon in the employee list (see Employee list).

Final tasks upon employee exit

1. On the **Main** tab enter the **Ending date** of the last employment period.
2. On the **Balances and holidays** tab add **Balance corrections** that bring the working time, overtime and holiday balances to zero as of the exit date, then click **Save** and **Show current** to verify.
3. Untick **Active**. Confirm the assignment dialog if the employee still has assignments; all licences of the employee are released.
4. Click **Save**.

4.3 Skills (Admin > Tables > Skills)

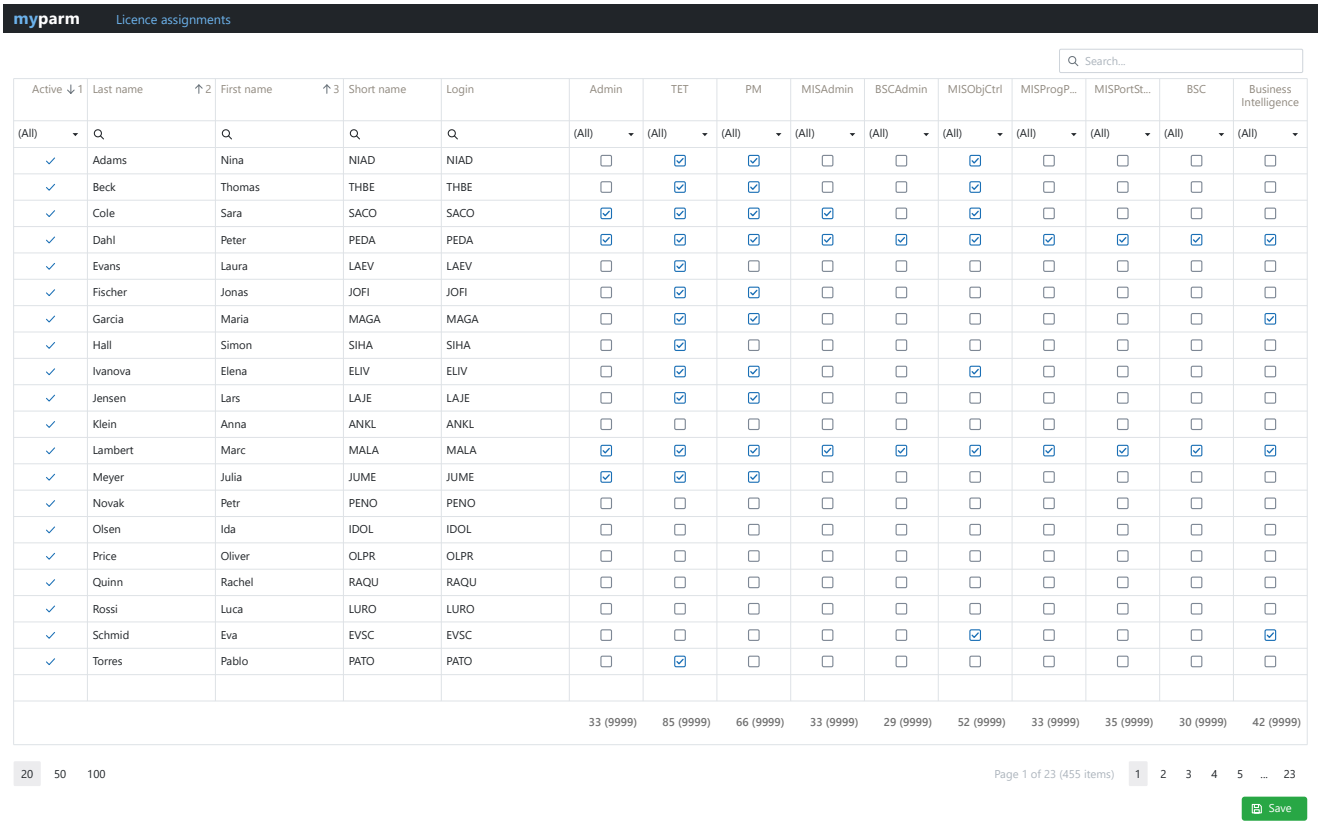
Skills are free-text qualifications that can be assigned to employees in *HR* (field *Skills*) and that are used as filters in team management and resource planning.



- **List (left):** column **Name**; search box, filter row and pager; **green plus** adds a new skill (grey while there are unsaved changes); **trash icon** deletes the skill after the confirmation "The skill will be removed from assignments in HR. Do you want to continue?". If the skill is still in use and cannot be deleted, "Cannot delete or change details due to being used." is shown.
- **Details (right): Name** (required, max. 50 characters, must be unique) and **Description** (max. 1000 characters).
- **Save** (floating disk button at the bottom right) is enabled when a skill is selected and highlighted when the data is valid and changed.

4.4 Licence assignments

This screen assigns the purchased licences to employees. It is available to users with the access right "Can maintain licence" and the Admin licence.

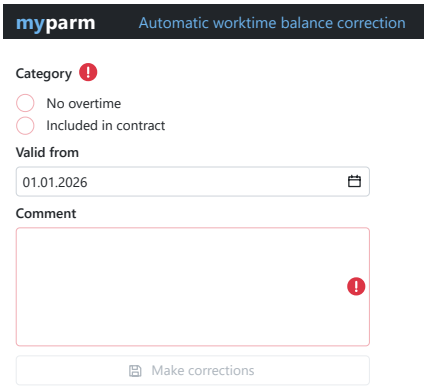


- The grid lists all employees with the columns **Active**, **Last name**, **First name**, **Short name**, **Login** (read-only) and one checkbox column per purchased licence: **Admin**, **TET**, **PM**, **MISAdmin**, **BSCAdmin**, **MISObjCtrl**, **MISProgPortOper**, **MISPortStratEnt**, **BSC**, **Business Intelligence**. Licences that were not purchased (zero available) have no column.
- Use the **search box**, the **filter row** (e.g. filter *Active* = true) and the pager to find employees.
- Tick or untick a checkbox to grant or withdraw a licence. Ticking **PM** automatically ticks **TET**; unticking **TET** automatically unticks **PM**.
- The **footer row** shows for every licence "<used> (<available>)". If more licences are used than available, the number is shown in bold red and the data cannot be saved.
- **Save** (bottom right) saves the changed rows. If the limit is exceeded, a "wrong values" message appears. If you changed your own licences, the message "Your licence have been changed. The page is about to be reloaded." is shown and the application reloads.

4.5 Automatic worktime balance correction

This screen creates working-time balance corrections for all employees of a given overtime category in one step (for example to neutralise the overtime of employees without overtime entitlement at the end of a year). It is available to users with the access right "Human

Resources portal" and the PM licence, and only if the HR setting "show automatic balance corrections" is switched on.



Fields:

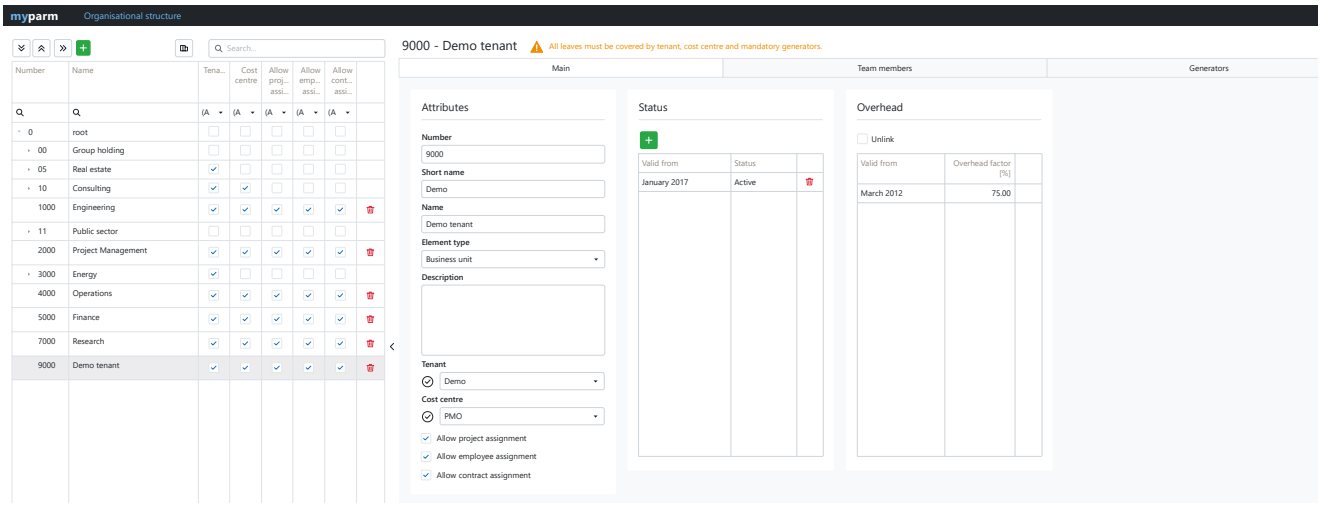
- **Category** (required): *No overtime* or *Included in contract* – the overtime setting of the employees (see HR > Balances and holidays tab > Overtime) whose balances you want to correct. A red error icon is shown until a category is selected.
- **Valid from** (required): the date of the correction; preset to 1 January of the current year. It cannot be earlier than the first day of the first not permanently closed period.
- **Comment** (required, max. 1000 characters): the comment written into the generated balance corrections.

Procedure:

1. Select the **Category**, check **Valid from** and enter a **Comment**.
2. Click **Make corrections** (the button is enabled only when all fields are valid).
3. If a correction for this date and category has already been run, the dialog "Automatic balance correction has been already run for this day. Would you like to overwrite the corrections?" appears: *Yes* replaces the existing corrections, *No* adds new ones.
4. The corrections are created on the server and the form is reset to its default values.

4.6 Organisational structure

The organisational structure is the tree of the company's organisation units (root, companies, departments, teams …). Depending on your access rights you get either the **manageable** variant (access right "Can manage organisation unit") or the **read-only** variant (access right "Organisation portal"). Both show the same tree and the same detail tabs; the read-only variant has no add, delete or edit controls.



Tree (left pane)

- Toolbar: **Expand all**, **Collapse all**, **Toggle columns** (widens the tree and shows all columns), **Add organisation unit** (green plus) and **Add cost object** (green euro button; shown only when cost objects are enabled in the configuration).
- Columns: **Number**, **Name**, **Tenant**, **Cost centre**, **Cost object** (if enabled), **Allow project assignment**, **Allow employee assignment**, **Allow contract assignment**. The last columns are checkmarks. A column chooser, a search box and a filter row are available.
- An **orange warning triangle** next to the name marks a lowest-level unit ("leaf") that lacks a tenant, a cost centre, an invoice number generator or an expenditure number generator, or a unit whose number generator has run out of numbers. When such units exist, the toast "There are organisation units not covered by tenant or cost centre. myParm may not be fully functional." appears on loading.
- A **trash icon** is shown for leaf elements only (see Deleting).
- Click a row to show its details on the right. The **arrow button** between the panes collapses the tree.

Adding an organisation unit

1. Select the element under which the new unit shall be created (the toast "Please select an existing element to add a new one." reminds you if nothing is selected).
2. Click **Add organisation unit**. The new unit is created below the selected element with an active status from the first open period.
3. Fill in the attributes and click **Save**.

The unit cannot be added if you still have unsaved changes ("Please save your changes before adding a new element."), if the selected element is inactive ("You cannot add a new element to an inactive one."), if the selected element is already assigned to a PLA, contract or employee ("You cannot add a new element to an element assigned to a PLA, Contract or Employee."), or if the selected element is a cost object ("Elements cannot be added to a cost object.").

Adding a cost object

Cost objects are simple accounting elements below a unit. Select a unit that has a tenant and click **Add cost object**. Possible messages: "Assign a tenant in order to add a cost object.", "You cannot add a new cost object to an inactive element.", "Elements cannot be added to a cost object.". A cost object has only the attributes **Number** (required, unique, digits and dots) and **Name** (required, unique, max. 80 characters).

Detail pane – header and tabs

The header shows "<Number> - <Name>" of the selected element. The warning "All leaves must be covered by tenant, cost centre and mandatory generators." is displayed in orange when the structure (or the newly created unit) is not completely covered.

For organisation units the detail pane has the tabs **Main**, **Team members** and **Generators**. A red error icon next to a tab name indicates invalid data on that tab; an orange triangle on *Main* or *Generators* indicates missing coverage.

Main tab – Attributes

- **Number** (required, max. 20 characters, unique, digits and dots only).
- **Short name** (required, max. 20 characters, unique).
- **Name** (required, max. 80 characters, unique).
- **Element type** (required): drop-down of the organisation unit types (preselected if only one exists).
- **Description** (max. 1000 characters).
- **Tenant**: if the unit *is* a tenant, a drop-down with a check-circle icon is shown (required). If the tenant is inherited from a parent unit, the drop-down is read-only and marked with an arrow-up icon. If no tenant is defined yet, the green button **Assign tenant** is shown; clicking it asks "Do you want to assign tenant on this level? This cannot be undone." and then enables the drop-down.
- **Cost centre**: works like *Tenant*. The **Assign cost centre** button is shown only when the unit has (or inherits) a tenant; the confirmation reads "Do you want to assign cost centre on this level? This cannot be undone."
- **Allow project assignment**, **Allow employee assignment**, **Allow contract assignment** (checkboxes): shown only for units without child units. They control whether projects, employees and contracts may be assigned to this unit.

Main tab – Status

Grid with the columns **Valid from** (accounting period) and **Status** (*Active* / *Inactive*).

- **Green plus** adds a status via a dialog with *Valid from* and *Status*. No further status can be added once a row is *Inactive* (the plus turns grey).
- Only the **last** row can be edited or deleted; rows in closed periods are locked. Deleting is refused with "Cannot delete organisation status." if it is the last entry or lies in a closed period.

- Setting a status to **Inactive** asks "Changing organisation unit's status has impact on other units. Do you want to proceed?". If objects are still assigned to the unit or its children, the list "There are one or more assignments to this item or one of its children." is shown before the change is applied. Whether the status of a child unit may be changed also depends on the status of its parent unit.

Main tab – Overhead

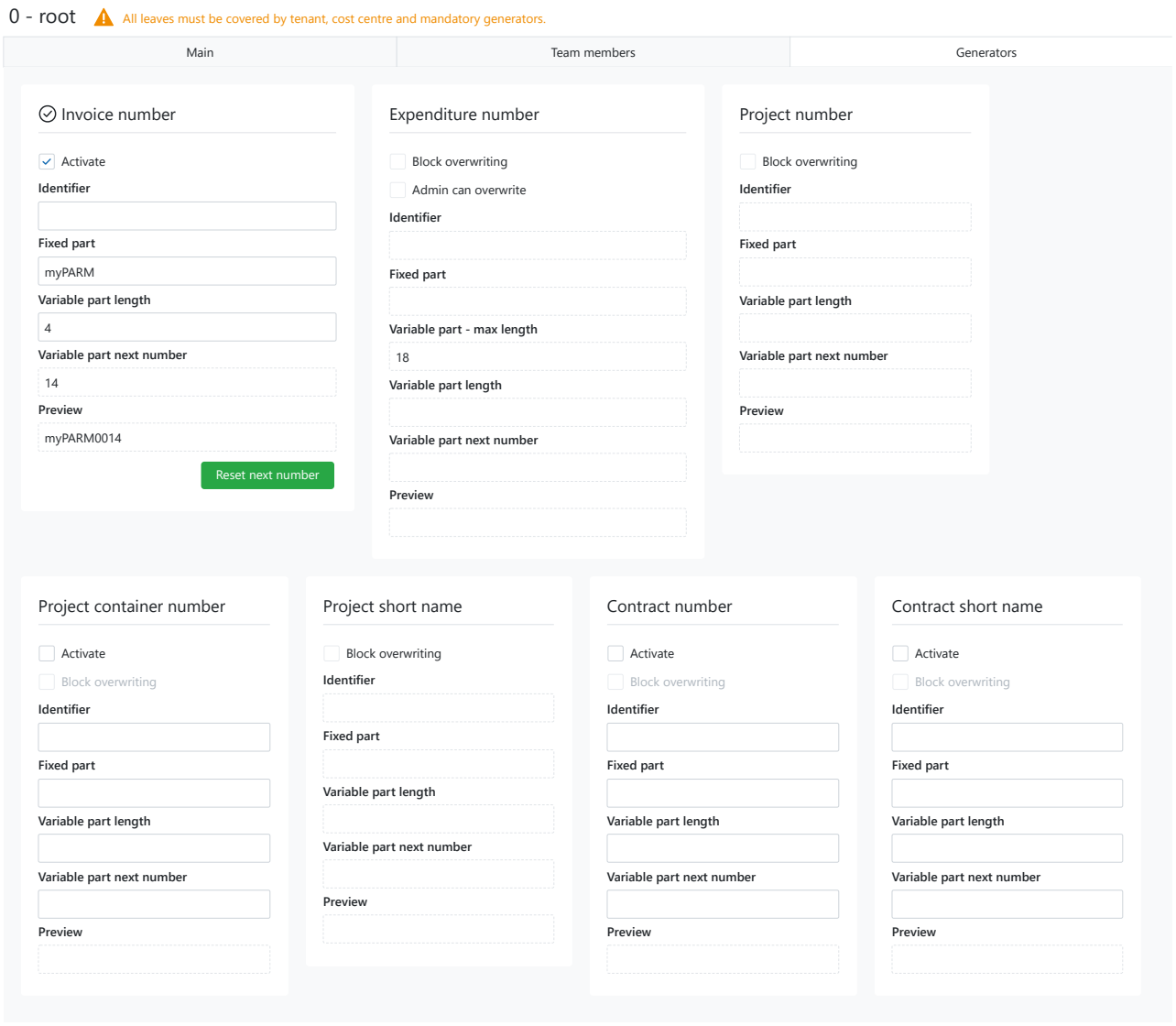
Shown for all units except the root.

- **Unlink** (checkbox in the toolbar): unticked = the overhead factors are inherited from the parent unit (grid read-only); ticked = the unit defines its own factors. When unlinked, at least one factor is required ("At least one overhead factor is required.").
- Grid with the columns **Valid from** (period) and **Overhead factor [%]** (0 to 9999). **Green plus** opens a dialog with the same fields. Only the latest row can be edited or deleted; rows in closed periods are locked.

Team members tab

Grid of the employees assigned to the unit (the "organisation team"): columns **Role name**, **Valid from**, **Valid to**, **Is deputy**, **Number**, **Short name**, **First name**, **Last name**. The **green plus** opens the team-assignment dialog in which you select the employee, at least one role ("Please select at least one role.") and the validity dates; the **pencil** icon edits and the **trash** icon deletes an assignment after the confirmation "Are you sure you want to delete the assignment?". The dialog is the same as in project team management. Assignments cannot start before the first open period.

Generators tab



Each number generator is a box with an icon in its heading: **check-circle** = the generator is defined on this unit; **arrow-up** = inherited from a parent unit (the field *Defined on* then names that unit); **orange triangle** = a leaf unit without a required generator, or the generator has run out of numbers ("No more numbers are available."). Generator boxes are read-only when the generator is inherited or when child units already define their own generator of that type.

Available generators:

Generator	Shown when	Special fields
Artificial invoice number	artificial invoice booking is allowed in the invoicing settings; root unit only	*Variable part next number* read-only; **Reset next number** button; no *Block overwriting*
Invoice number	always (required for leaves)	*Variable part length*; *Variable part next number* read-only; **Reset next number** button; no *Block overwriting*
Expenditure number	always (required for leaves)	*Block overwriting*, *Admin can overwrite*, *Variable part - max length* (read-only), *Variable part length*

Generator	Shown when	Special fields
Project number	unless project-container-based project numbering is configured	*Block overwriting*, *Variable part length*
Project container number	root unit only	*Block overwriting*, *Variable part length*
Project short name	always	*Block overwriting*, *Variable part length*
Contract number	always	*Block overwriting*, *Variable part length*
Contract short name	always	*Block overwriting*, *Variable part length*

Fields of a generator:

- **Defined on**: the unit that defines the generator (only for inherited generators).
- **Activate** (checkbox): switches the generator on for this unit. All other fields are disabled while it is unticked. The checkbox is shown only where the generator can be defined: a generator type can be defined only once in one line of the organisation tree, so if it is already defined on a higher unit, the units below it have no Activate checkbox. When a generator is deactivated again, its whole definition is lost, including the current next number.
- **Block overwriting** (checkbox): the generated number cannot be overwritten by users.
- **Admin can overwrite** (checkbox, expenditure number only): administrators may still overwrite the number; available only when *Block overwriting* is ticked.
- **Identifier** (max. 10 characters; for the numeric generators – project number, project container number, contract number – only digits and dots): must be unique across the whole organisation structure.
- **Fixed part** (max. 10 characters, digits and dots).
- **Variable part - max length** (expenditure number, read-only): the technical maximum length of the running number.
- **Variable part length** (all generators except the artificial invoice number): length of the running number; from 1 to the maximum (10 for project and contract numbers).
- **Variable part next number**: the next running number to be used. Read-only for the invoice generators.
- **Preview**: the next number as it will be generated; updated automatically. The total length of identifier, fixed part and running number is limited ("Total length of Identifier, Fixed part and Variable part next number must not be greater then <n>.").
- **Reset next number** (artificial invoice and invoice number): after the confirmation "Do you want to reset the next number? This could lead to generation of duplicate identifiers." the next number is set back to 1. Click **Save** afterwards.

Year change for number ranges (e.g. invoice numbers containing the year):

1. Select the unit on which the generator is defined (check-circle icon).
2. For the invoice generators: change the **Fixed part** (e.g. the year), click **Reset next number**, confirm and click **Save**.
3. For the other generators: untick **Activate**, click **Save**, tick **Activate** again, fill in **Identifier**, **Fixed part** and **Variable part length** as needed and click **Save**. The next number starts again at 1.

Saving

The floating **Save** button (disk icon, bottom right) is enabled when an element is selected and highlighted when the data is valid and changed. If any tab is invalid, a "wrong values" message is shown.

Deleting

Only leaf elements (units without child units, and cost objects) show a **trash icon** in the tree. Click it and confirm "Do you really want to delete "<Number - Name>"?". Elements that are in use cannot be deleted ("… cannot be deleted due to existing entries." or "Cannot delete or change details due to being used.").

Read-only variant

Users with the access right "Organisation portal" but without "Can manage organisation unit" see the same tree (toolbar with *Expand all*, *Collapse all*, *Toggle columns*; no add or delete buttons) and the same detail tabs in read-only mode. On the *Generators* tab only the generators that are actually defined or inherited are listed; if there is none, "None of the generators is available." is shown. There is no *Save* button.

5. Currencies and rates

5.1 Common elements of the screens in this chapter

All screens of the "Currencies and rates" submenu (Currencies, VAT, Cost accounts, Rates & Categories) and the "Payment condition sets" screen share the same layout:

- The list (or tree) of entries is on the left. The small chevron button on the right edge of the list panel hides or shows the panel.
- The details of the selected entry are shown on the right. The name of the selected entry is shown as a heading above the details.
- The **Save** button is in the bottom right corner. It is disabled while nothing is selected and turns green as soon as the selected entry has valid, unsaved changes.
- Lists have a search box, a filter row below the column headers and a pager (page sizes 20, 50, 100).

- If you select another entry while the current one has unsaved changes, myPARM asks "Are you sure you want to leave without saving? All of your changes will be lost." Choose Yes to discard the changes or No to stay.
- If you click Save while the form contains errors, the message "There are missing or wrong values in this form." appears. Fields with errors show a red marker; hover over it to read the hint.
- The green plus button for a new entry is only active while there are no unsaved changes; save first ("Please save your changes before adding a new element.").
- Rate grids: the green plus above the grid opens a dialog for a new rate, the red trash icon at the end of a row removes the rate, and a red error icon next to the plus appears when the grid as a whole is invalid (hover over it to read the reasons). Rates are saved together with the entry when you click Save.
- Closed periods (see 1. Period management): a rate whose "Valid from" date lies in a closed period can neither be edited nor deleted. New rates cannot start earlier than the first non-closed period ("Valid from must be greater or equal first non closed period start date."). If a period is closed by someone else while you edit, saving fails with "Period has been closed."

5.2 Currencies

Menu: **Admin** > **Currencies and rates** > **Currencies**. Shown only to users with the access right "Admin" and the Admin licence.

myPARM comes with all ISO currencies preloaded. Currencies cannot be created or deleted; you only activate the ones you need, adjust their names and maintain exchange rates.

System currency

- Above the list, the text **System currency:** followed by the ISO code (for example "System currency: EUR") shows the currency in which myPARM calculates.
- If no system currency has been set yet, a red error icon with the hint "System currency is not fixed." and the green button **Fix system currency** are shown instead. Until the system currency is fixed, the list cannot be searched and no currency can be selected.
- Click **Fix system currency**. A small dialog with one drop-down opens. Select the currency (you can type the ISO code or the name to search) and click **Fix system currency**; **Cancel** closes the dialog without change. The list reloads and shows the system currency. The system currency can be set only once; if a colleague set it in the meantime the message "System currency has been set already." appears and the list reloads.

List

Columns: **Active**, **ISO code**, **Short**, **Name**. Active currencies are sorted to the top, then by Short. There is no plus button and no delete icon.

Details

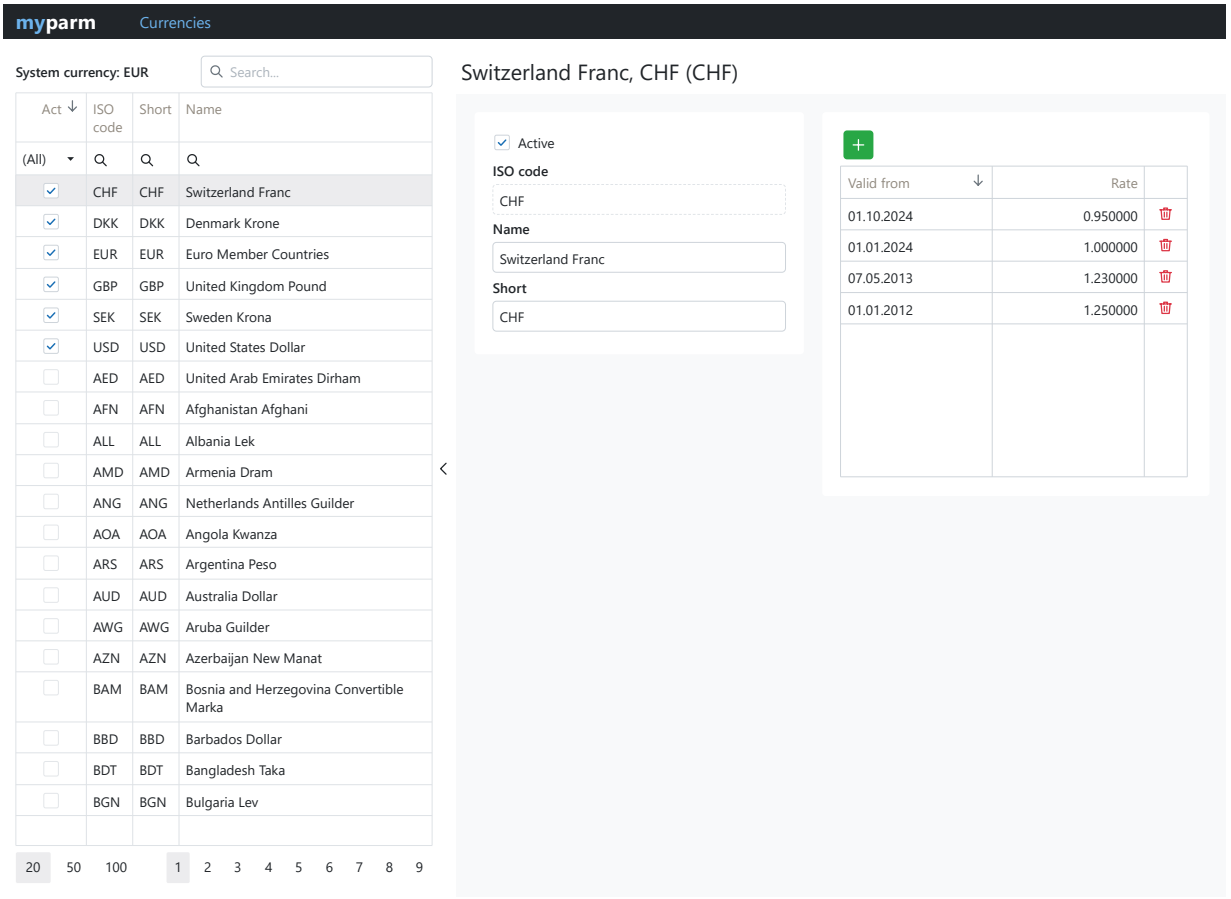
- **Active** – tick to activate the currency for use in myPARM. Once a currency has been saved as active, the checkbox becomes read-only; an active currency cannot be deactivated. An active currency must have at least one exchange rate ("There should be at least one rate in active currency.").
- **ISO code** – read-only.
- **Name** – required, must be unique among all currencies, up to 100 characters.
- **Short** – required, must be unique, up to 20 characters.

Rates (not shown for the system currency)

Grid with the columns **Valid from** (newest first) and **Rate** (6 decimals).

1. Click the green plus. The dialog shows **Valid from** and **Rate**.
2. Enter the date and the rate. The date must be unique in the grid ("Valid from dates are not unique.") and must not be earlier than the start of the first non-closed period. The rate must be between 0.000001 and 9999999999999 ("Rate value must be in range from 0.000001 to 9999999999999.").
3. Click **OK** (or **Cancel**). The new rate appears in the grid.
4. Click **Save**.

Rates that do not lie in a closed period can also be changed directly in the grid cells. The red trash icon deletes a rate; for a rate in a closed period the message "Cannot delete entry within a closed period." appears instead. A rate is valid from its "Valid from" date until the next rate starts.



5.3 VAT

Menu: **Admin** > **Currencies and rates** > **VAT**. Shown only to users with the access right "Admin" and the Admin licence.

List

- Green plus (top left of the list) creates a new VAT entry. The new entry already contains one rate that starts at the first non-closed period.
- Columns: **Active**, **Tet relevant**, **Short** (sorted), **Description**, **Rate** (the rate valid today, in percent).
- Red trash icon per row. myPARM asks "Do you really want to delete {Short}?". If the VAT has been used, the message "The VAT {Short} cannot be deleted due to existing entries." appears and nothing is deleted.

Details

- **Active** – the VAT can be selected in the application.
- **Tet relevant** – the VAT is offered to employees in the TET (time and expense tracking) module.
- **Short** – required, unique ("Short is not unique."), up to 20 characters.
- **Description** – required, up to 50 characters.

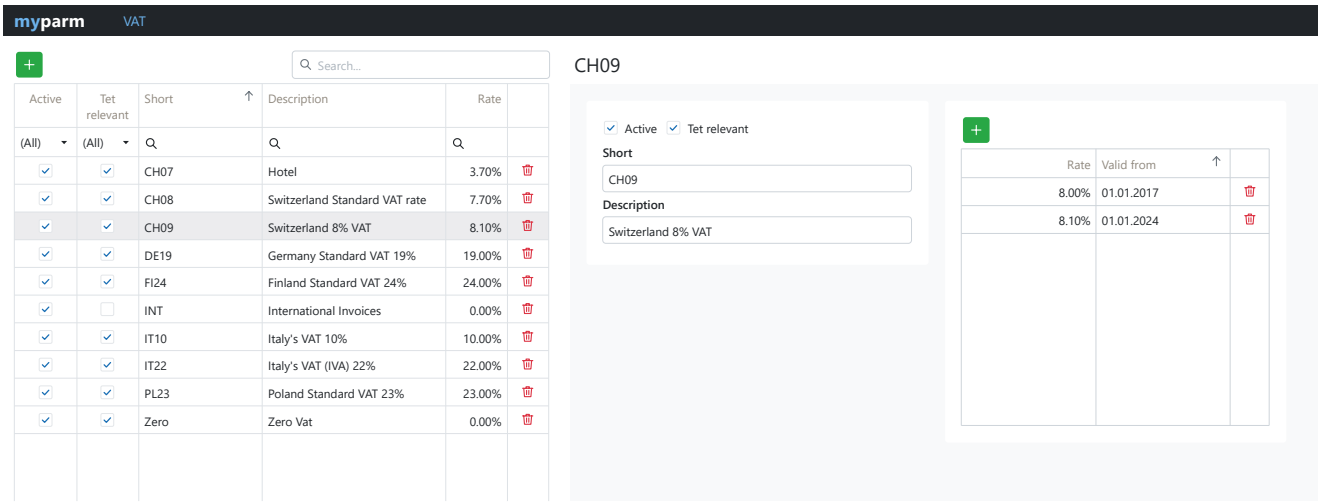
Rates

Grid with the columns **Rate** (in percent) and **Valid from** (oldest first).

1. Click the green plus. The dialog shows **Valid from** and **Rate**.
2. Enter a unique date (not earlier than the first non-closed period) and a rate between 0 and 99.99 ("Rate value must be in range from 0 to 99.99.").
3. Click **OK**, then **Save**.

Rules:

- The oldest rate (the one starting at the first non-closed period) cannot be deleted ("Cannot delete the first VAT rate with first not closed period start date.") and its date cannot be changed; only its rate value can be edited.
- A rate in a closed period cannot be edited or deleted ("Cannot delete VAT within closed period.").
- "Valid from dates are not unique." is shown when two rates have the same date.



5.4 Cost accounts

Menu: **Admin** > **Currencies and rates** > **Cost accounts**. Shown only to users with the access right "Admin" and the Admin licence.

Cost accounts are the accounts to which working time (time accounts) and expenditures (material / expenses / third-party accounts) are booked.

Tree

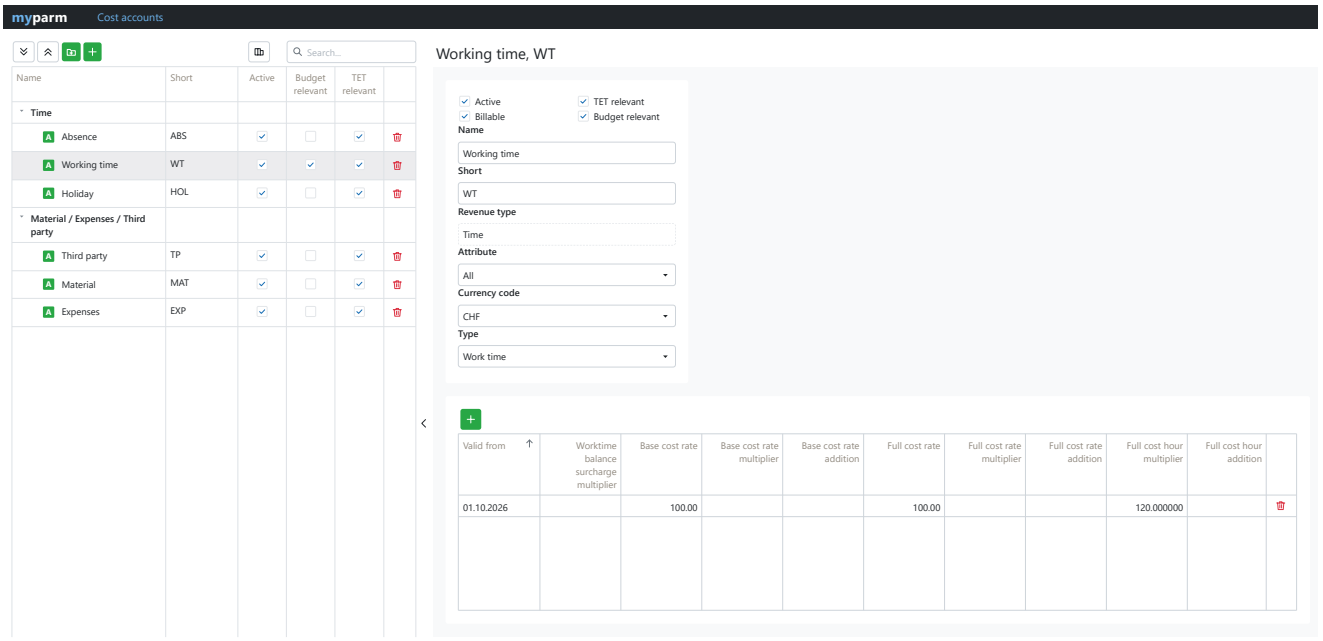
The tree has two fixed root groups: **Time** and **Material / Expenses / Third party**. Below them you create groups (bold, marked with a "G" icon) and cost accounts (marked with an "A" icon). Root groups cannot be renamed or deleted.

Toolbar above the tree:

- **Expand all** / **Collapse all**.
- Green folder-plus button **Add new group cost account**.
- Green plus button **Add new cost account**.
- Both add buttons require a selected node. They are always enabled for a root group; for any other node they are enabled only when that node is saved and has no unsaved changes. The new element is created under the selected group.

Columns: **Name**, **Short**, **Active**, **Budget relevant**, **TET relevant**. The checkbox columns are shown for accounts only. The columns **Billable** and **Payable** are hidden by default; open the column chooser (icon in the top right of the tree, with a search box) to show them. A search box filters the tree.

The red trash icon at the end of a row deletes a group or account after the question "Do you really want to delete "{Name}"?". A group or account that has already been used cannot be deleted; the message "It is not possible to delete this cost account or cost account group as it has been used" appears.



Group details

- **Name** – required, unique among the groups of the same parent, up to 50 characters.

Account details

- Checkboxes: **Active**, **TET relevant** (employees can book on it in TET), **Billable**, **Budget relevant**, **Payable** (material accounts only).
- **Name** – required, unique within the parent group, up to 50 characters.
- **Short** – required, unique among all cost accounts, up to 20 characters.
- **Revenue type** – for material accounts: **Expenses**, **Material** or **3rd party** (required); for time accounts it is fixed to **Time**.
- **Attribute** – **Own**, **Foreign** or **All** (the employment relationship the account applies to).
- **Currency code** – the currency of the account rates.
- **Type** – time accounts only: **Work time**, **Not counted in work time balance**, **Overtime**, **Overtime compensation**, **Holiday** or **Absence**. The type cannot be changed to Holiday, Not counted in work time balance or Overtime compensation if a rate of the account has a worktime balance surcharge multiplier ("Not possible to use this time type. A cost account rate has worktime balance surcharge multiplier defined.").
- Once the account has been used, **Short**, **Revenue type**, **Attribute**, **Currency code** and **Type** become read-only.

Rates of a time account

Columns (all editable in the grid unless the rate lies in a closed period): **Valid from**, **Worktime balance surcharge multiplier** (editable only for the types Work time, Overtime and Absence), **Base cost rate**, **Base cost rate multiplier**, **Base cost rate addition**, **Full cost rate**, **Full cost rate multiplier**, **Full cost rate addition**, **Full cost hour multiplier**, **Full cost hour addition** (entered as hours:minutes), **Full cost fix rate**, **Selling rate**, **Selling rate multiplier**, **Selling rate addition**, **Selling hour multiplier**, **Selling hour addition** (hours:minutes), **Selling fix rate**,

Planning rate, **VAT rate**, **VAT rate for revenue**. The VAT columns show the VAT as "rate % - description" and offer the VAT entries from the VAT screen (if only one VAT exists it is preselected).

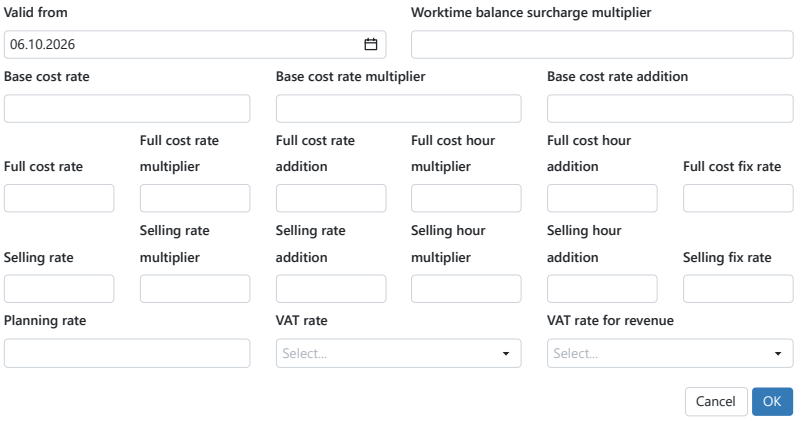
Rates of a material account

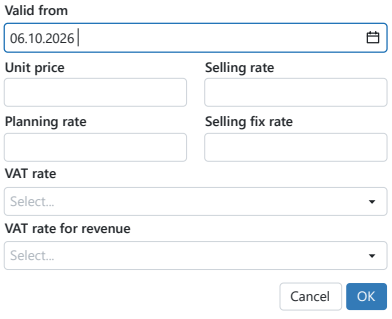
Columns: **Valid from**, **Unit price**, **Selling rate**, **Selling fix rate**, **Planning rate**, **VAT rate**, **VAT rate for revenue**.

Adding a rate

1. Select the account and click the green plus above the rates grid.
2. The dialog shows the same fields as the grid columns; **Valid from** is required and must be unique ("Valid from dates are not unique.") and not earlier than the first non-closed period.
3. Click **OK**, then **Save**.

Deleting a rate in a closed period is refused with "Cannot delete rate" / "Cannot delete rate within closed period.". Saving is refused with "Cannot save the cost account rate because an expenditure in different currency already exists." if expenditures in another currency are already booked on the account.





5.5 Rates & Categories

Menu: **Admin** > **Currencies and rates** > **Rates & Categories**. Shown only to users with the access right "Admin".

Rate categories define hourly rates per employee category (for example junior / senior consultant). Each category holds a history of rates.

Tree

The root element is **Rates & Categories**. Below it you create groups ("G" icon, bold) and categories ("C" icon). A group can contain either sub-groups or categories, but not both.

Toolbar:

- **Expand all / Collapse all**.
- Green folder-plus button **Add rates & categories group** – enabled when the root or a saved group without categories is selected.
- Green plus button **Add category** – enabled when a group (other than the root) without sub-groups is selected, or when a category is selected (the new category goes into the same group).
- Both buttons are disabled while there are unsaved changes.

Columns: **Name**, **Active**, **Budget relevant**, **Employee relevant** (checkboxes shown for categories only). A search box filters the tree. The red trash icon deletes a group or category after the confirmation question; an element that is already used cannot be deleted ("cannot be deleted due to existing entries").

Group details: **Name** (required, unique, up to 50 characters).

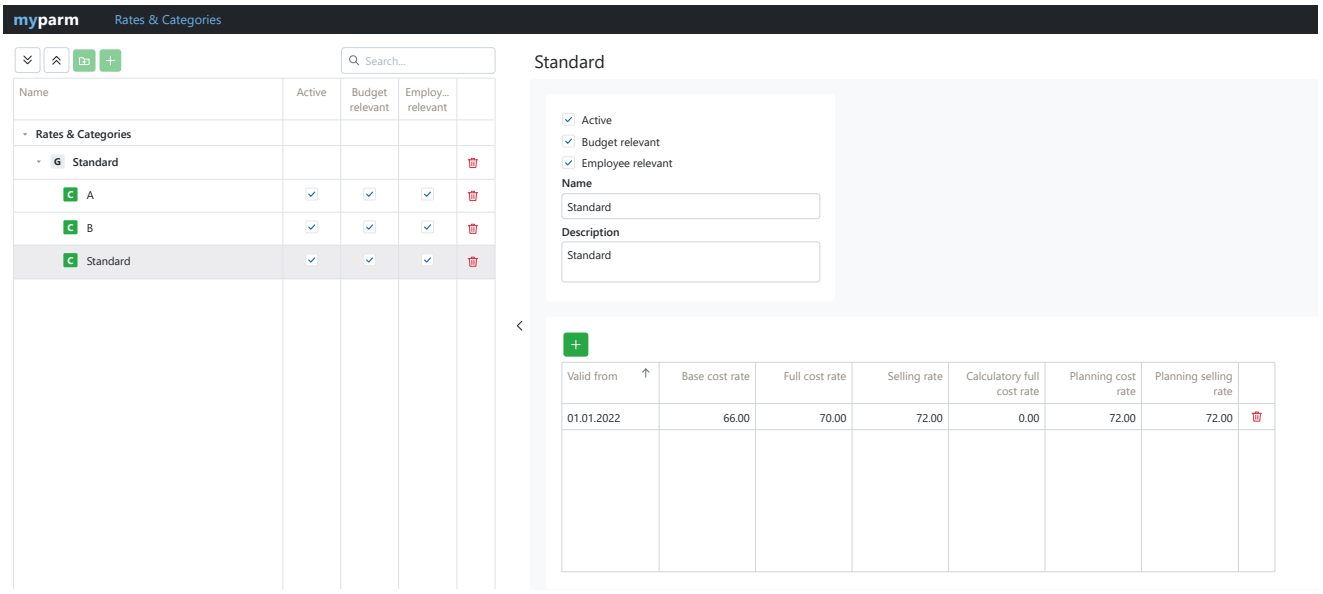
Category details

- **Active**, **Budget relevant**, **Employee relevant** checkboxes.
- **Name** – required, unique, up to 50 characters.
- **Description** – up to 50 characters.

Rates

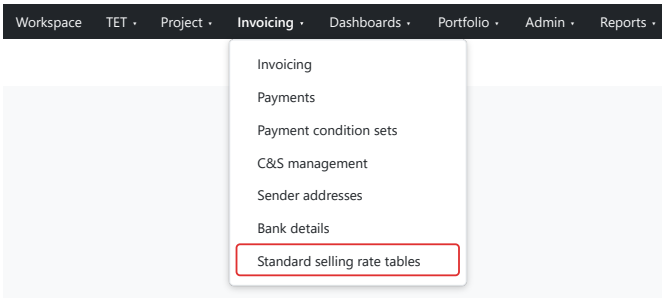
Columns: **Valid from** (oldest first), **Base cost rate**, **Full cost rate**, **Selling rate**, **Calculatory full cost rate**, **Planning cost rate**, **Planning selling rate**. All cells can be edited directly in the grid.

1. Click the green plus; the dialog shows the same fields.
2. Enter a unique **Valid from** date (required; "Valid from dates are not unique.") and the rates.
3. Click **OK**, then **Save**.



6. Standard selling rate tables

Menu: **Invoicing** > **Standard selling rate tables**.



6.1 Purpose

A standard selling rate table (selling rate table for short) is a named set of selling rates that is assigned to a contract. It defines, per cost account and per rate category, the price charged to the customer, and can hold exceptions for individual employees. When invoicing a contract, myPARM takes the selling rates from the contract's table instead of the general rates in the admin tables.

6.2 Who can open the screen

- The user needs the access right **Standard selling rates** ("Gives access to maintain standard selling rates tables.") and either the Admin or the Project Management licence.
- The menu item and the screen are not available in the SaaS Standard version.
- The three definition pages of a table (cost accounts, categories, employee exceptions) additionally check that the table still exists. If the table has been deleted by someone else in the meantime, you are taken back to the list of tables; if this happens while you are on the list, the message "A data conflict occurred due to parallel entries. Your data has been reset." appears and the list is reloaded.

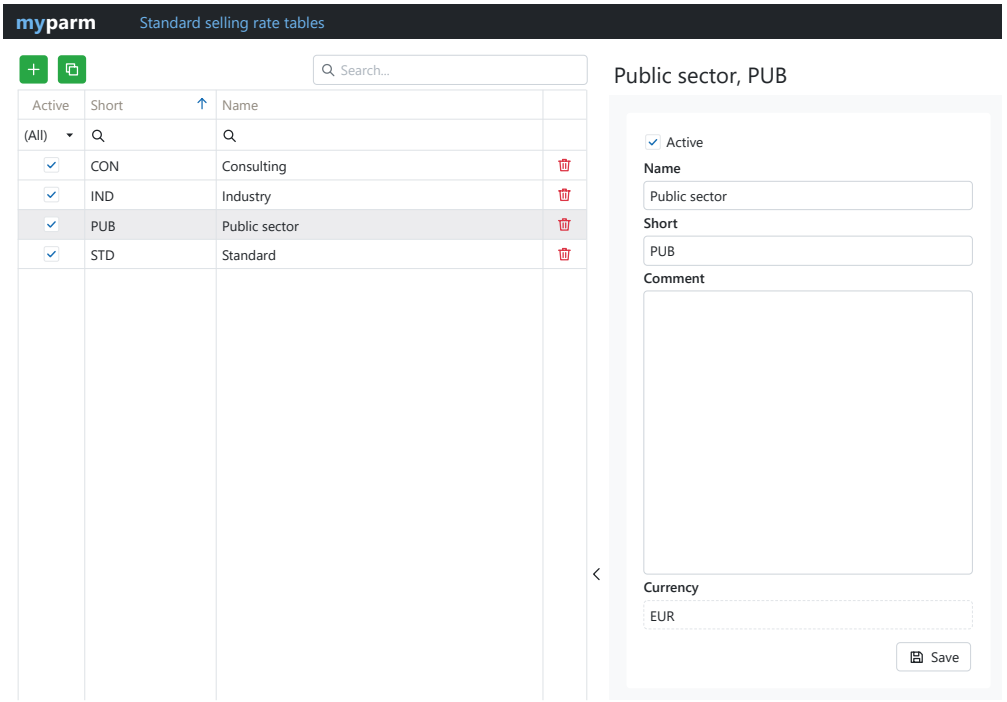
6.3 List of tables

The screen uses the two-panel layout (list on the left, details on the right; see 5.1 Common elements of the screens in this chapter).

Toolbar of the list:

- Green **plus** – creates a new table (see 6.4 Creating a table).
- **Copy** button (two sheets icon) – creates a new table as a copy of the selected one. Enabled only when a table is selected and there are no unsaved changes.

Columns: **Active**, **Short** (sorted), **Name**. Search box, filter row and pager are available. The red trash icon deletes a table after the question "Do you really want to delete ...?"; a table that is used by contracts cannot be deleted ("... cannot be deleted due to existing entries.").



6.4 Creating a table

1. Click the green plus. The dialog "new table" opens with:
   - **Active** checkbox.
   - **Name** – required, unique, up to 50 characters.
   - **Short** – required, unique, up to 20 characters.
   - **Comment** – free text, up to 1000 characters.
   - **Currency** – optional; select the ISO code of the currency in which all rates of this table are entered (searchable, can be cleared with the x). Leave it empty if the rates should be kept in the currency of each cost account; the system currency is then used for categories and exceptions.
2. Click **OK**. The table is created and saved immediately and appears in the list. **Cancel** discards the dialog.

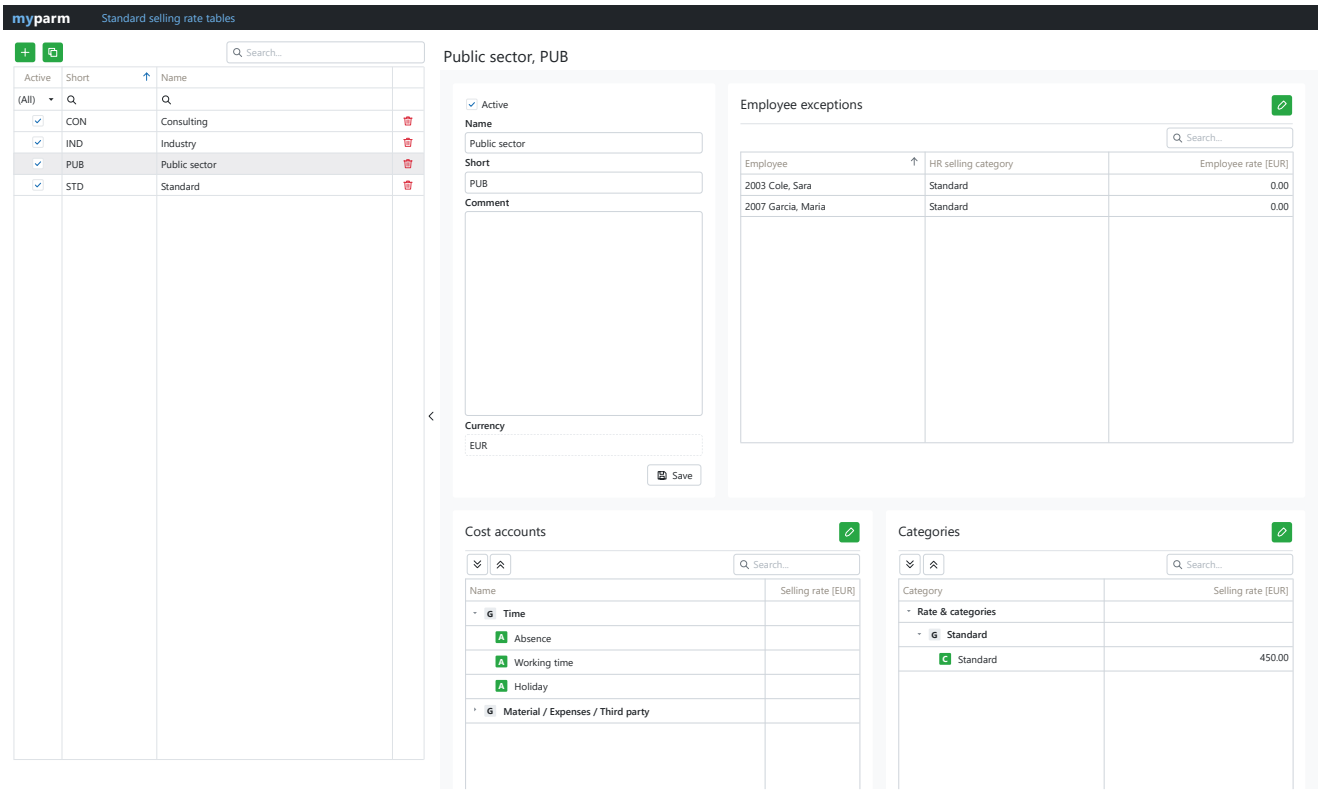
6.5 Copying a table

1. Select the source table and click the copy button.
2. The same dialog opens. Enter a new Name and Short. The **Currency** cannot be changed: it shows the currency of the source table, or the word "source" if the source table has no fixed currency.
3. Click **OK**. The copy with all its details is created.

6.6 Details of a table

The right panel shows four cards:

- **Attributes** (top left): **Active**, **Name**, **Short**, **Comment**, **Currency**. The Currency drop-down is read-only once the table exists. Change the values and click the **Save** button inside this card.
- **Employee exceptions** (top right): read-only preview with the columns **Employee**, **HR selling category** and **Employee rate [currency]**. The green pencil button opens the "Employee exceptions of ..." page.
- **Cost accounts** (bottom left): read-only preview tree with **Expand all** / **Collapse all**, a search box and the columns **Name** and **Selling rate [currency]**. A small calculator icon in front of a rate means that an addition or multiplier is defined; a hammer icon means that a fix rate is defined. Click either icon to see an information popup with the account name and all its values (Selling rate, Selling fix rate, Selling hour addition, Selling hour multiplier, Selling rate addition, Selling rate multiplier). If the table has no fixed currency, an extra column **Currency** shows the currency of each account. The green pencil button opens the "Cost accounts of ..." page.
- **Categories** (bottom right): read-only preview tree with the columns **Category** and **Selling rate [currency]**, a search box, Expand all / Collapse all and a green pencil that opens the "Rate & categories of ..." page.



6.7 Cost accounts of a table

Opened with the pencil of the "Cost accounts" card. The page title is "Cost accounts of" followed by the table name and its currency. On these definition pages every change is saved immediately; there is no Save button.

Left: tree

- Green **back arrow** button returns to the list of tables; **Expand all** / **Collapse all**.
- The tree shows the complete cost account structure from the admin "Cost accounts" screen (root groups **Time** and **Material / Expenses / Third party**, groups with a "G" icon, accounts with an "A" icon).
- Columns: **Cost account**, **Selling rate [currency]** (with the calculator / hammer icons explained in 6.6 Details of a table) and, if the table has no fixed currency, **Currency**.
- The red trash icon on an account removes the selling rates defined in this table for that account, after the question "Do you really want to delete ...?".

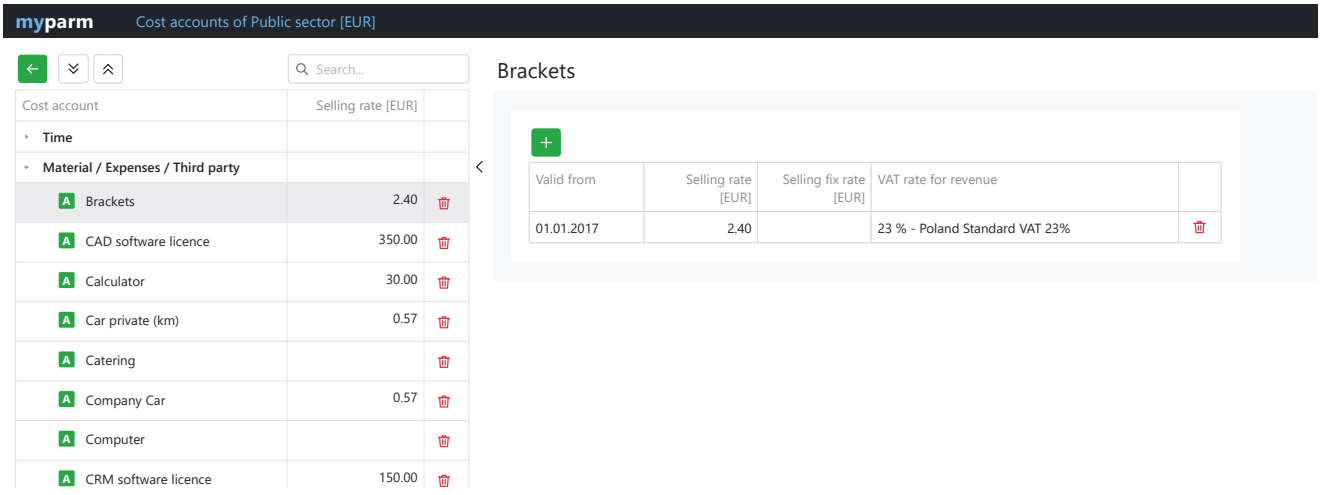
Right: rates of the selected account

Select an account (not a group) to see its rates. The grid is sorted by Valid from.

Time accounts: **Valid from**, **Selling rate [currency]**, **Selling rate multiplier**, **Selling rate addition [currency]**, **Selling hour multiplier**, **Selling hour addition**, **Selling fix rate [currency]**, **VAT rate for revenue**.

Material accounts: **Valid from**, **Selling rate [currency]**, **Selling fix rate [currency]**, **VAT rate for revenue**.

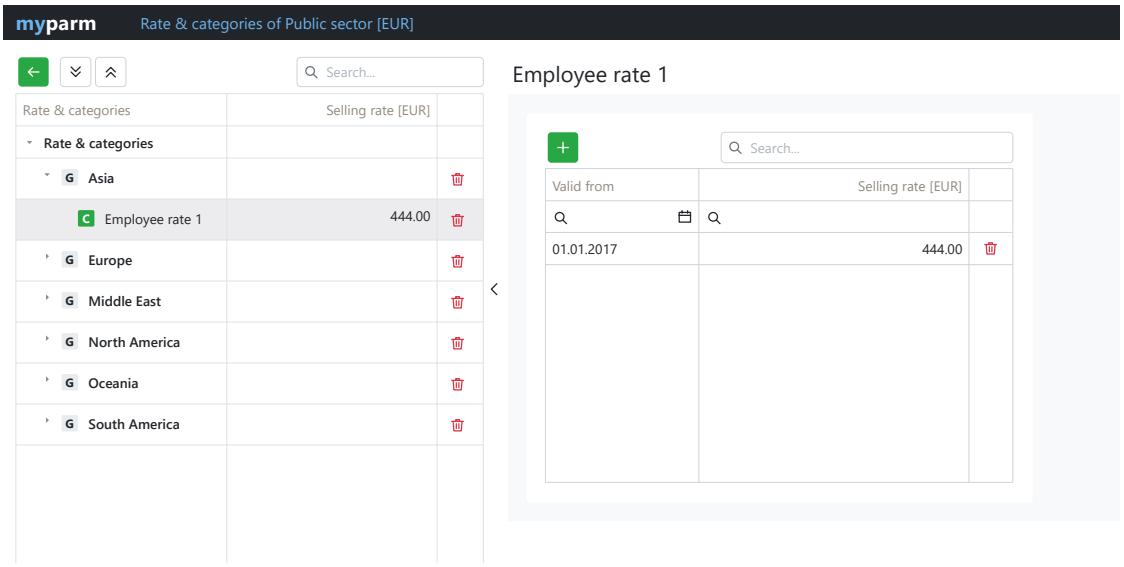
- Green plus: opens the "add rate" dialog with the same fields. **Valid from** is required, must be unique and not earlier than the first non-closed period. The VAT drop-down offers the VAT entries (preselected if only one exists). Click **OK**; the rate is saved immediately.
- Double-click a row to open the same dialog for editing. Rows whose date lies in a closed period cannot be edited.
- Red trash icon: asks "Do you really want to delete this item?". For a rate in a closed period the message "Entry is not removable due to:" / "Cannot delete entry within a closed period." is shown instead.
- The error icon next to the plus lists grid-wide problems (duplicate dates, missing dates, dates in a closed period).



6.8 Categories of a table

Opened with the pencil of the "Categories" card. Page title "Rate & categories of" followed by the table name and its currency.

- Left: tree of the rate categories from the admin "Rates & Categories" screen with the columns **Rate & categories** and **Selling rate [currency]**, back arrow, Expand all / Collapse all and search box. The red trash icon on a group or category removes the selling rates defined in this table for that category or for all categories of the group, after the question "Do you really want to delete ...?".
- Right: for the selected category a grid with **Valid from** and **Selling rate [currency]**, search box, filter row and pager. Green plus opens the dialog with **Valid from** and **Selling rate**; double-click a row to edit; trash icon with the question "Do you really want to delete this item?" and the closed-period rules described in 6.7 Cost accounts of a table. Changes are saved immediately.



6.9 Employee exceptions of a table

Opened with the pencil of the "Employee exceptions" card. Page title "Employee exceptions of" followed by the table name. An exception overrides the category rate for one employee.

Left: list of employees with exceptions

- Green back arrow and green plus in the toolbar.
- Columns: **Employee** (sorted), **HR selling category** (the selling category stored in the employee's HR data), **Employee rate [currency]** (the rate currently valid).
- Red trash icon deletes the employee's exception after confirmation.

Adding an employee:

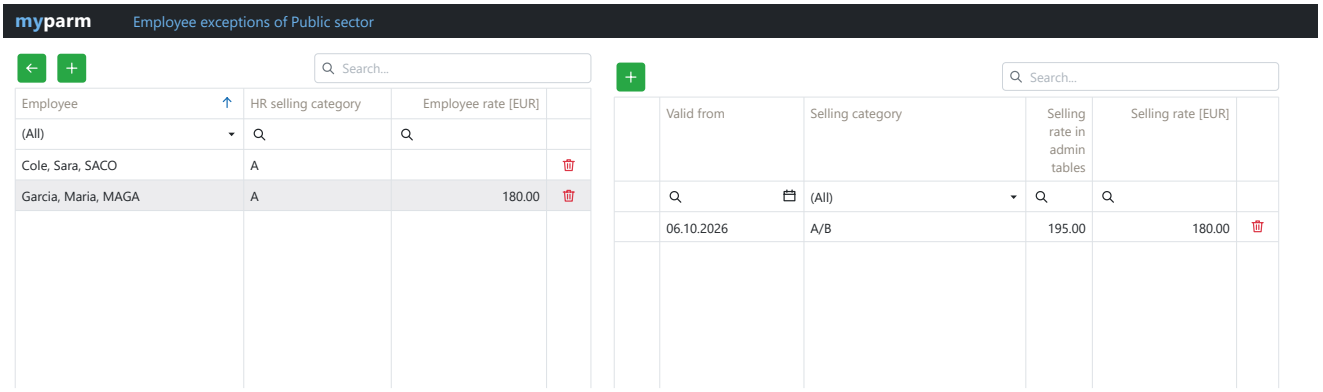
1. Click the green plus. A dialog with the drop-down **Employee** opens; it offers only active employees who do not have an exception in this table yet.
2. Select the employee and click **OK**. The exception is created immediately and selected.

Right: exception rates of the selected employee

Grid with search box, filter row and pager and the columns: a red error icon column (shown for invalid rows, e.g. duplicate dates), **Valid from**, **Selling category** (tree drop-down of the rate categories; only active categories can be chosen), **Selling rate in admin tables** (read-only; the selling rate of the chosen category from the admin "Rates & Categories" screen on that date), **Selling rate [currency]** (required; the rate to charge for this employee).

1. Click the green plus. The dialog shows **Valid from** (required, unique, not before the first non-closed period), **Selling category**, **Selling rate in admin tables** (filled automatically after date and category are chosen) and **Selling rate** (required).
2. Click **OK**; the rate is saved immediately.
3. Double-click a row to edit it in the same dialog; the category and the rate can also be changed directly in the grid.

4. The trash icon asks "Do you really want to delete this item?"; rates in a closed period cannot be deleted ("Cannot delete entry within a closed period.").

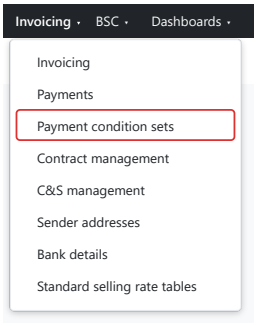


6.10 Where selling rate tables are used

- **Project** > **Gantt** > **New contract** and **Invoicing** > **Contract management**: the field **Standard selling rate table** assigns a table to a contract. Only active tables are offered.
- In the contract of a project, a project-specific "SSRT definition" (SSRT = standard selling rate table) lets project managers define employee exceptions for the project; the admin table is the basis.
- **Project** > **Project control**: the timesheet grid shows the column "SSRT category" with the category used for each booking.
- Invoice drafts take the selling rates from the contract's table.

7. Payment condition sets

Menu: **Invoicing** > **Payment condition sets**.



7.1 Purpose

A payment condition set describes the payment terms printed on and applied to invoices: within how many days the customer must pay and which discount is granted for early payment (for example "10 days 2 %, 30 days 0 %"). A set is assigned to each contract and is shown on the invoice.

7.2 Who can open the screen

The user needs the access right **Can maintain payment conditions** ("Gives access to maintain payment conditions.") and the Admin licence. The item is not available in the SaaS Standard

version.

7.3 List

Two-panel layout (see 5.1 Common elements of the screens in this chapter).

- Green plus creates a new set (only while there are no unsaved changes).
- Columns: **Active**, **Short** (sorted), **Name**. Search box, filter row and pager.
- Red trash icon per row: "Do you really want to delete ...?". A set that is used by contracts or invoices cannot be deleted ("... cannot be deleted due to existing entries.").

7.4 Details

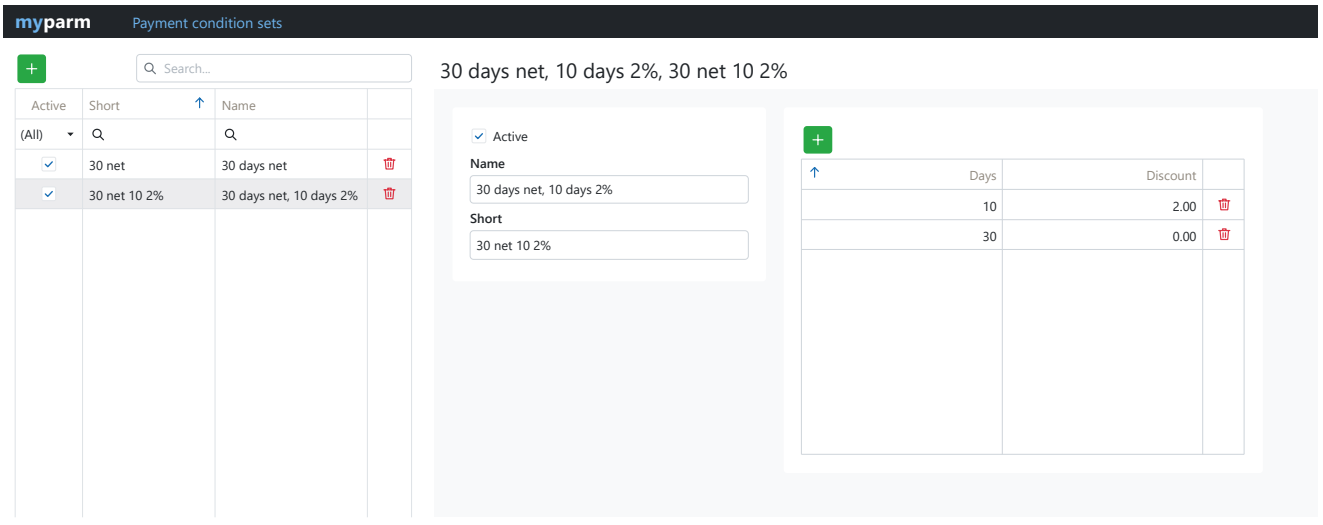
- **Active** – the set can be selected in contracts and invoices.
- **Name** – required, unique, up to 50 characters.
- **Short** – required, unique, up to 20 characters.

7.5 Conditions

Grid with the columns **Days** (whole number, 0 or more, sorted ascending) and **Discount** (percent, 0 to 100). Both cells can be edited directly in the grid.

1. Click the green plus above the grid. The dialog shows **Days** and **Discount**; both are required. The number of days must not already exist in the set ("Days value must be unique.").
2. Click **OK**. The condition is added to the grid.
3. Click **Save** (bottom right) to store the set.

The red trash icon removes a condition without further question (the removal becomes final when you save). A set must contain at least one condition ("There should be at least one payment condition."); otherwise the error icon next to the plus is shown and the set cannot be saved.



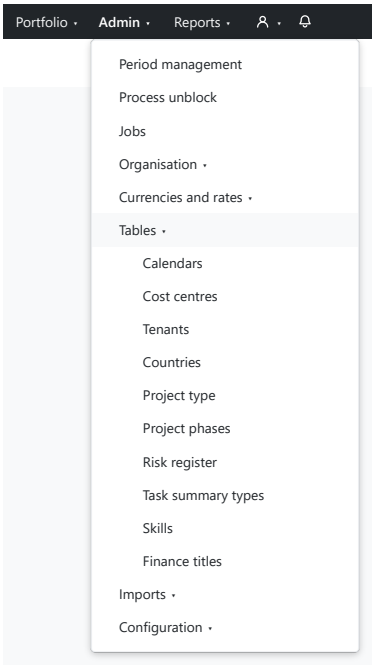
7.6 Where payment condition sets are used

- **Project > Gantt > New contract** and **Invoicing > Contract management**: the required field **Payment conditions** selects the set for the contract.
- **Invoicing > Invoice details**, tab **Customers** (and the customer / supplier entry dialogs): the column **Payment conditions** shows or selects the set for the invoice recipient.

8. Tables

8.1 Common behaviour of all table screens

All screens of the Admin > Tables submenu work the same way. Every screen requires the access right "Admin" and the Admin licence; users without them do not see the menu entries. The Skills entry of this submenu is described in 4.3 Skills.



Layout:

- The left panel is a list (grid) of all items. It has a search box, a filter row under the column headers, sortable columns and a pager with page-size selector at the bottom.
- The grey chevron bar between the list and the details collapses or expands the list.
- The right panel shows the details of the selected item. Its heading shows the name of the selected item. The panel is empty until you select a row.
- The Save button is at the bottom right of the screen. It is disabled while nothing is selected. It turns green as soon as the selected item has unsaved, valid changes.

Toolbar of the list:

- Green plus button: adds a new row to the list and opens its empty details. While there are unsaved changes the button turns grey and does nothing; save or discard your changes first.
- Red trash icon at the end of each row: deletes the row. A confirmation "Do you really want to delete "<name>"?" appears first (header "myPARM"). If the item is in use the

message ""<name>" cannot be deleted due to existing entries." is shown and nothing is deleted.

Editing rules:

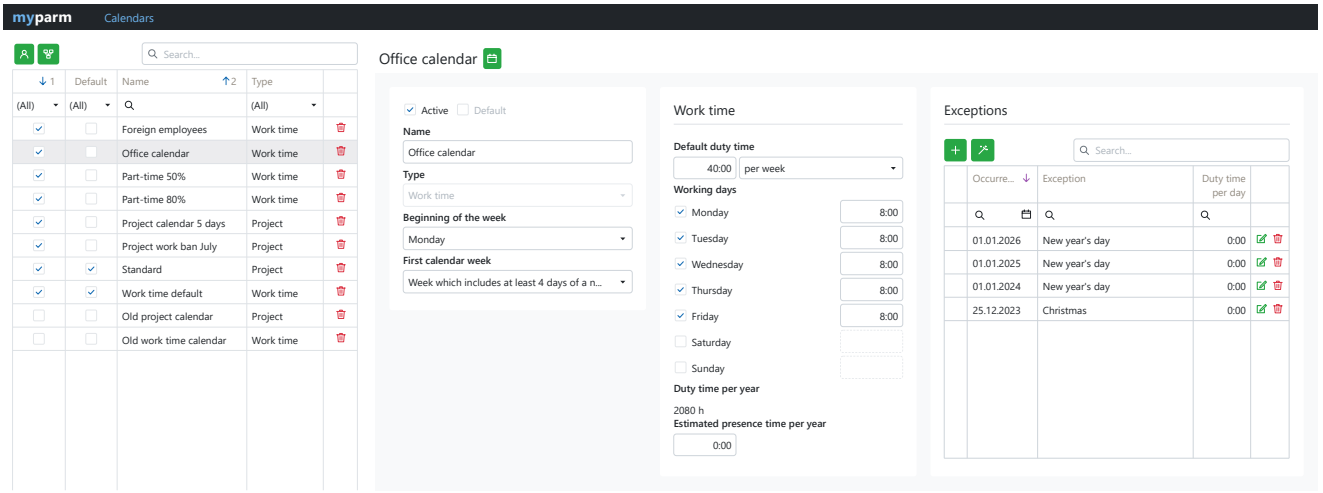
- Required fields show a red border and the hint "This field cannot be empty." Values that must be unique show "The entered value already exists, but it has to be unique."
- If you click Save while the form contains errors, the message "There are missing or wrong values in this form." appears and nothing is saved.
- If you select another row, or leave the screen, while there are unsaved changes, the question "Are you sure you want to leave without saving? All of your changes will be lost." appears. Choose Yes to discard the changes or No to stay.
- If the server refuses a change because the item is already in use, the message "Cannot delete or change details due to being used." appears and the details are reloaded.
- After a successful save the row in the list is refreshed and stays selected.

8.2 Calendars

Menu: Admin > Tables > Calendars. Page header: "Calendars".

Calendars define duty (working) time. There are two kinds:

- Work time calendar: defines how many hours a person is expected to work on each weekday, plus exceptions (public holidays, bridge days). Work time calendars are assigned to employees (field "Worktime calendar" in HR, see Employment model tab).
- Project calendar: defines which days count as working days for project scheduling. The default project calendar should have all seven days active and must not have exceptions.



List columns: Active, Default, Name, Type (Work time, Project; older calendars may show the type Resource). The list is sorted by Active (active first) and then by Name.

Toolbar buttons:

- Person icon (hint "Work time"): adds a new Work time calendar. The new calendar starts with Monday to Friday active, 8:00 per day (40:00 per week), week starting on Monday.
- Project-diagram icon (hint "Project"): adds a new Project calendar. The new calendar starts with all days active.
- Both buttons are grey while there are unsaved changes.
- Red trash icon in a row: deletes the calendar after confirmation.

Details – main attributes box:

- Active: checkbox. It is locked when the calendar is the default calendar (the default calendar is always active).
- Default: checkbox. Ticking it also ticks Active. It is locked when another calendar of the same type is already the default; first untick Default on that calendar.
- Name: required, up to 50 characters, must be unique among calendars of the same type.
- Type: read-only; it is fixed by the button used to create the calendar.
- Beginning of the week: drop-down Monday ... Sunday.
- First calendar week: drop-down with "Week which includes at least 4 days of a new year" or "Week which includes the first of January".

Details – "Work time" box:

- Default duty time (Work time calendars only): a time box (hours:minutes) and a drop-down "per day" / "per week". With "per day" every active weekday gets this duty time and the weekday boxes are read-only. With "per week" the value is split evenly over the active weekdays when you change it, and you can then adjust every weekday individually.
- Working days: one checkbox per weekday (Monday ... Sunday) with a duty time box next to it. Untick a day to make it a non-working day. The time boxes are editable only for Work time calendars with "per week"; for Project calendars the boxes are read-only.
- An error icon next to "Working days" appears with the message "At least one day must be selected." when no day is ticked, or "The default project calendar must have all days active." when a default Project calendar has an unticked day.
- Duty time per year (Work time calendars only): read-only, calculated from the weekdays and the exceptions of the current year, shown in hours ("h").
- Estimated presence time per year (Work time calendars only): optional time box; the expected presence per year.

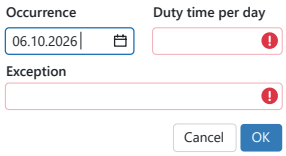
Details – "Exceptions" box (special days such as public holidays):

- Grid columns: an error-icon column (red icon when the row is invalid, e.g. duplicate date), Occurrence (date), Exception (name), Duty time per day. Sorted by date, newest first. Search box and filter row are available.
- Green plus: opens the "add exception" dialog. For a default Project calendar the message "The default project calendar cannot have any exceptions." appears instead.

- Green magic-wand button (hint "Copy exceptions from another calendar"): opens the copy dialog (see "Copy exceptions dialog" in this section).
- An error icon in the toolbar appears when the exception list is invalid (duplicate dates, or exceptions on a default project calendar).
- Green pencil in a row (or double-click on the row): edits the exception in the dialog.
- Red trash in a row: deletes the exception after the confirmation "Do you really want to delete this item?".
- Exceptions whose date lies in a closed period cannot be edited or deleted: the message "Cannot edit entry due to: Cannot edit entry within a closed period." or "Entry is not removable due to: Cannot delete entry within a closed period." appears.

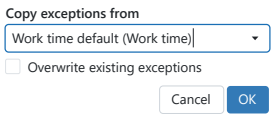
Add/edit exception dialog:

- Occurrence: date, required. Dates in a closed period are not allowed ("The date cannot be in a closed period."). The date must not already have an exception in this calendar.
- Duty time per day: required, 0:00 to 24:00. Enter 0:00 for a full day off.
- Exception: name, required, up to 50 characters.
- Cancel closes without changes; OK validates and adds/updates the row in the Exceptions grid. The calendar is only stored when you click Save on the main screen.



Copy exceptions dialog:

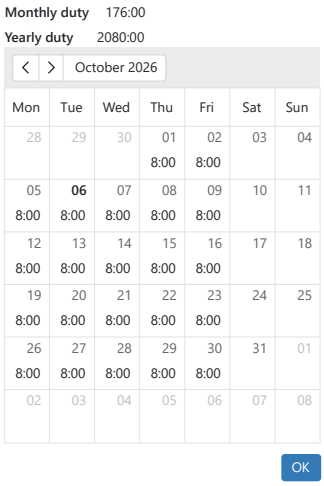
- Copy exceptions from: required drop-down listing all other calendars as "name (type)"; searchable.
- Overwrite existing exceptions: checkbox. When ticked, exceptions on dates that already exist in the current calendar are replaced by the copied name and duty time. When not ticked, such dates are skipped.
- Only exceptions that fall on a working day of the current calendar are copied.
- Cancel / OK. The copied rows are added to the grid; click Save to store them.



Show duties (Work time calendars only):

- Next to the calendar name in the details heading there is a green calendar icon (hint "Show duties"). It opens a month view with the duty time of every day, plus the totals "Monthly duty" and "Yearly duty" above it. Use the arrows of the month view to browse other months and years; the totals follow the displayed month. Close with OK.

- The button only works for a saved calendar; with unsaved changes the hint "Please save the calendar in order to see the duties." appears briefly.



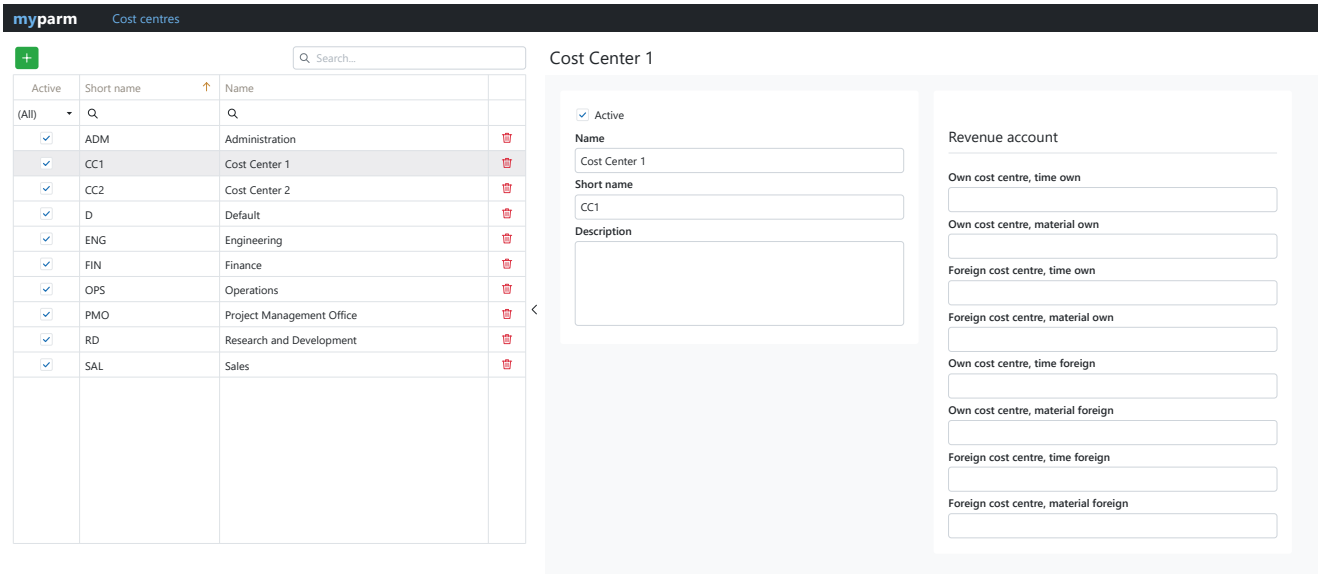
Saving:

- Save stores the calendar, its weekdays and all added, changed and deleted exceptions.
- If an exception falls into a period that was closed in the meantime, the message "Period has been closed." appears and the calendar is reloaded.

8.3 Cost centres

Menu: Admin > Tables > Cost centres. Page header: "Cost centres".

This screen is hidden in the SaaS Standard version of myPARM; Parm administrators can still open it. Cost centres are assigned to organisation units and can be used as a filter in budgeting.



List columns: Active, Short name, Name (sorted by Name).

Toolbar: green plus (add), red trash per row (delete after confirmation).

Details:

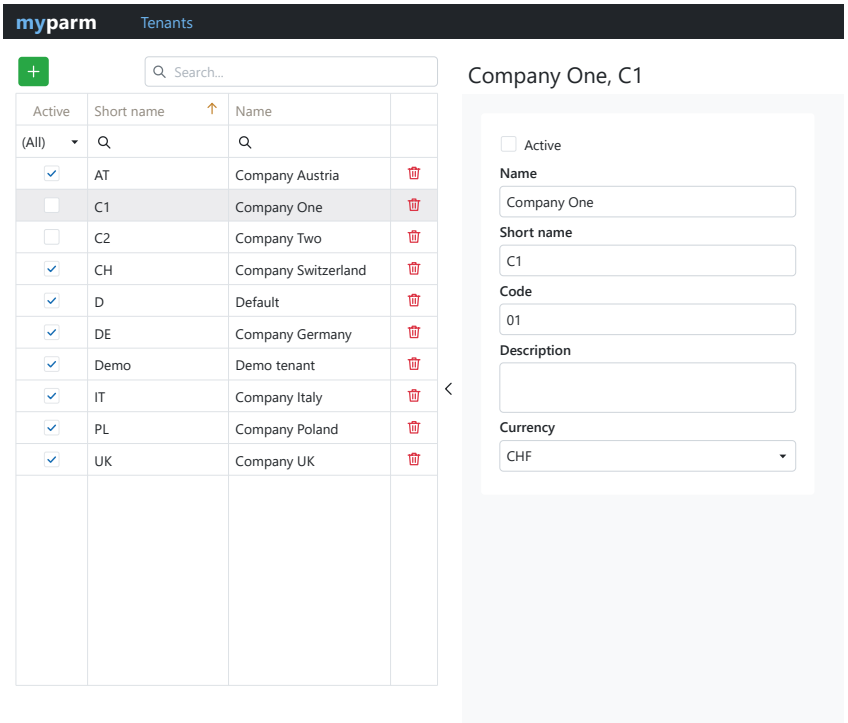
- Active: checkbox; inactive cost centres can no longer be selected elsewhere.
- Name: required, unique, up to 50 characters.
- Short name: required, unique, up to 20 characters.
- Description: optional, up to 255 characters.
- Revenue account (box): eight optional account numbers (up to 50 characters each). The fields are for information only: they document the revenue account numbers of the cost centre.
    - Own cost centre, time own
    - Own cost centre, material own
    - Foreign cost centre, time own
    - Foreign cost centre, material own
    - Own cost centre, time foreign
    - Own cost centre, material foreign
    - Foreign cost centre, time foreign
    - Foreign cost centre, material foreign

Click Save to store the cost centre.

8.4 Tenants

Menu: Admin > Tables > Tenants. Page header: "Tenants".

This screen is hidden in the SaaS Standard version; Parm administrators can still open it. Tenants (also called "mandants") are the legal entities of your company. They are assigned to organisation units, customers/suppliers and project containers and can be used as a filter in budgeting.



List columns: Active, Short name, Name (sorted by Short name).

Toolbar: green plus (add), red trash per row (delete after confirmation).

Details:

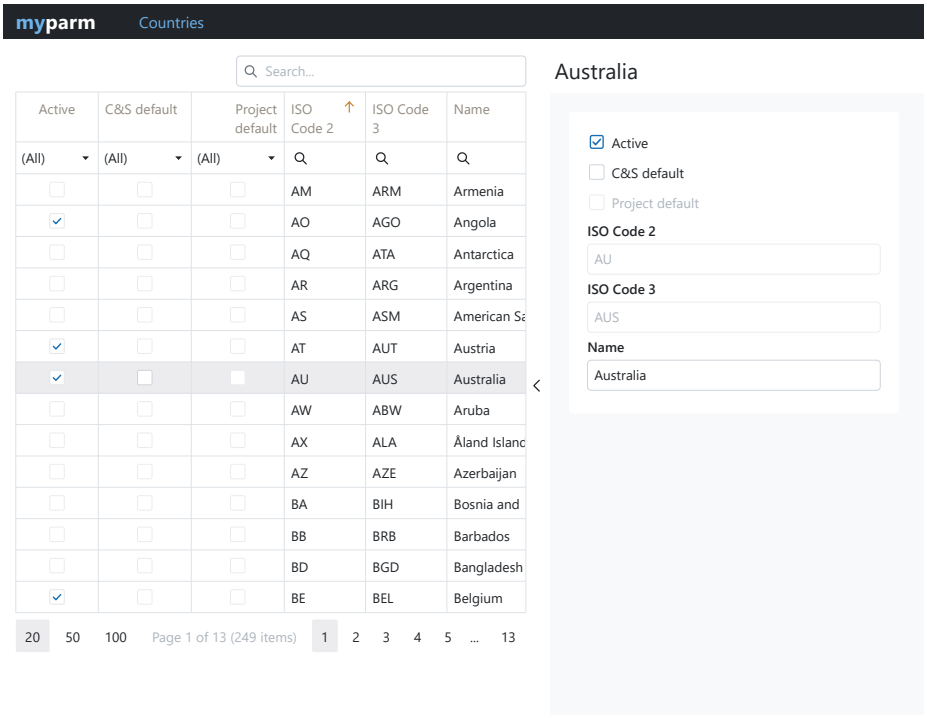
- Active: checkbox.
- Name: required, unique, up to 50 characters.
- Short name: required, unique, up to 20 characters.
- Code: required, unique, up to 10 characters.
- Description: optional, up to 255 characters.
- Currency: required drop-down of the active currencies (searchable by currency code). A new tenant is preset with the system currency.

Click Save to store the tenant.

8.5 Countries

Menu: Admin > Tables > Countries. Page header: "Countries".

The country list is delivered with myPARM. Countries cannot be added or deleted; you only activate the countries you need and may adjust their names.



List columns:

- Active
- C&S default: shown only when a Parm administrator has switched this option on for the installation.
- Project default: shown only when a Parm administrator has switched on the country field of the project attributes for the installation.
- ISO Code 2, ISO Code 3, Name. Sorted by ISO Code 2.

The toolbar has no add button and the rows have no delete button.

Details:

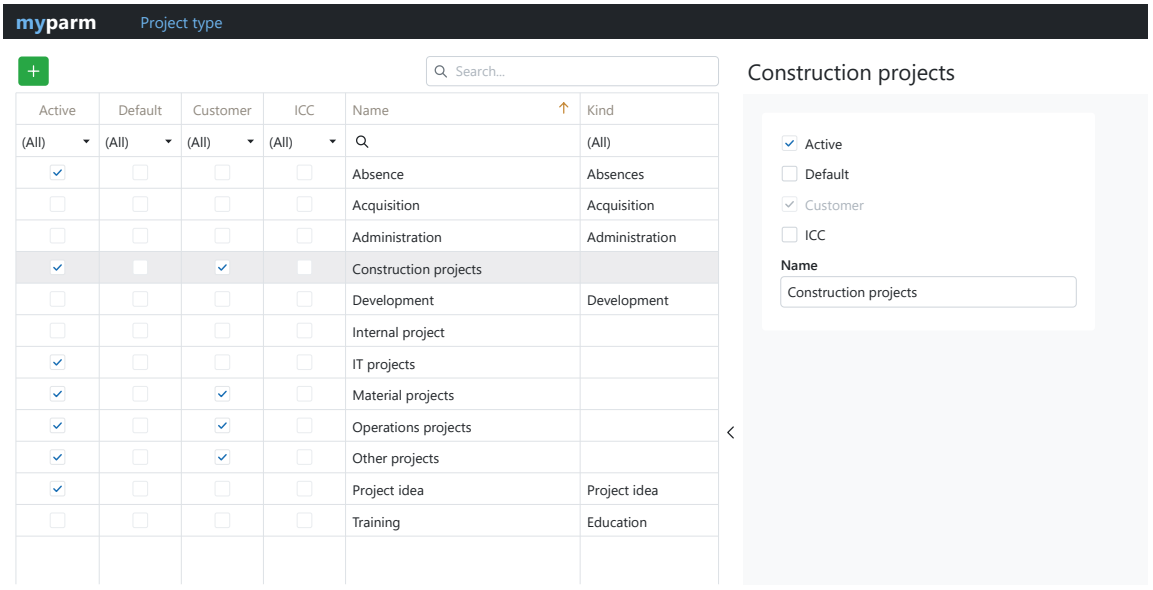
- Active: tick it to make the country available in address and project fields. The checkbox is locked while the country is the C&S default or the Project default.
- C&S default (only when a Parm administrator has switched this option on): the country preselected for new customers and suppliers. Only one country can be the default; the checkbox is locked when another country is already the default. Ticking it automatically ticks Active.
- Project default (only when a Parm administrator has switched on the country field of the project attributes): the country preselected in the project attributes of new projects. Same rules as for C&S default.
- ISO Code 2, ISO Code 3: read-only.
- Name: required, unique, up to 50 characters; you may overwrite the delivered name.

Click Save to store the country.

8.6 Project type

Menu: Admin > Tables > Project type. Page header: "Project type".

Project types are selected in the project attributes of every project. Some types are delivered with myPARM and have a fixed kind.



List columns: Active, Default, Customer, ICC, Name (sorted by Name), Kind (Absences, Acquisition, Administration, Development, Education, Predefined, Project idea; empty for ordinary project types).

Toolbar: green plus (add), red trash per row. Project types of the kind "Predefined" cannot be deleted; the message "Predefined project types cannot be deleted." appears.

Details:

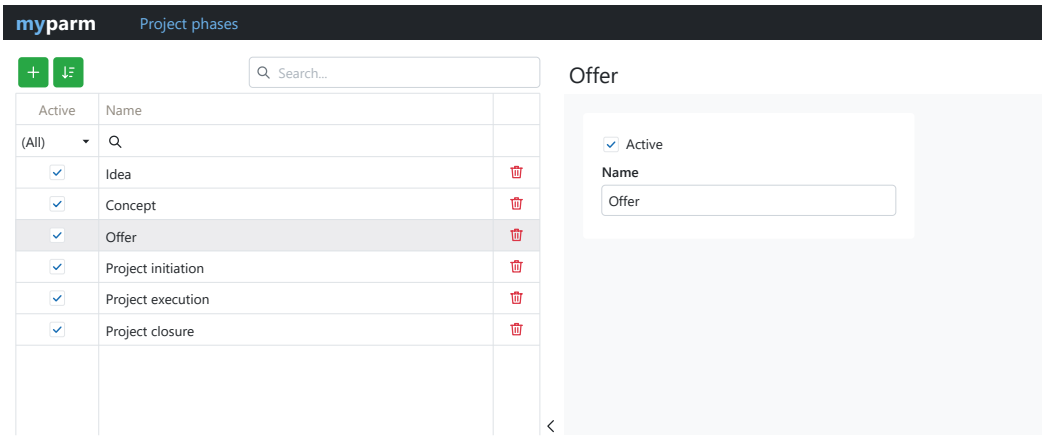
- Active: checkbox. Locked for the kinds Predefined and Project idea. Unticking Active also removes the Default flag.
- Default: the project type preselected for new projects. Locked while the type is inactive and for the kind Project idea. When you save a new default, the Default flag of the previous default type is removed automatically and the list is refreshed.
- Customer: tick for project types that represent customer projects. It can be set only while creating the project type; for existing types it is read-only.
- ICC: inter-cross charging; tick for project types whose work is charged between cost centres/tenants.
- Name: required, unique, up to 50 characters. Locked for the kinds Predefined and Project idea.
- Kind: read-only text, shown only for project types that have a kind.

Click Save to store the project type.

8.7 Project phases

Menu: Admin > Tables > Project phases. Page header: "Project phases".

The screen (and the menu entry) is available only when a Parm administrator has switched on the project phase field of the project attributes for the installation. Project phases are then offered in the "Project phase" drop-down of the project attributes (and in the main attributes of the project structure overview). The phases are offered in the order defined here.



List columns: Active, Name. The rows are shown in their position order.

Toolbar:

- Green plus: adds a new phase at the end of the list and opens its details.
- Reorder button (sort icon, hint "Reorder"): opens a dialog in which you drag the phases into the desired order; confirm with "Reorder" or leave with "Close". The new order is stored immediately. The button is grey while there are unsaved changes and then shows "Save your changes to be able to reorder items."; with fewer than two phases it shows "There is too little items to perform reordering."
- Red trash per row: deletes the phase after confirmation.

Details:

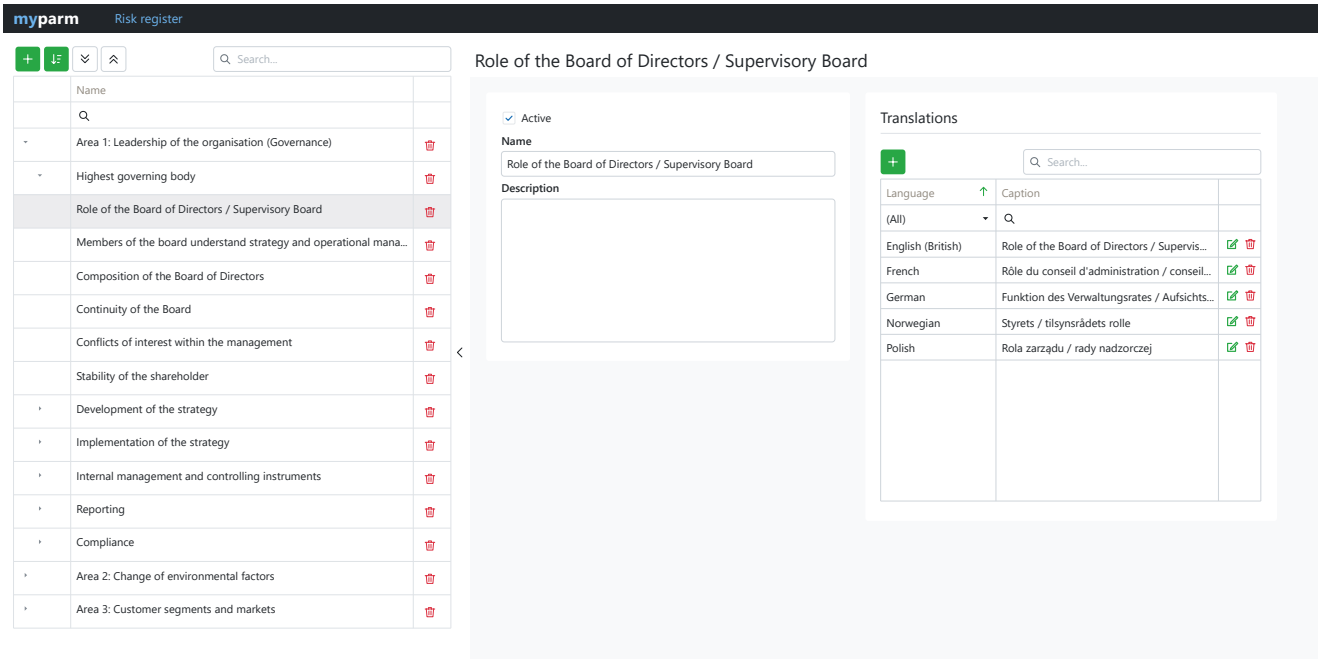
- Active: checkbox; inactive phases are no longer offered in the project attributes.
- Name: required, unique, up to 100 characters.

Click Save to store the phase.

8.8 Risk register

Menu: Admin > Tables > Risk register. Page header: "Risk register".

This screen is hidden in the SaaS Standard version; Parm administrators can still open it. The risk register is the catalogue of risk categories offered when a risk is logged for a project. The categories form a tree: top-level areas with sub-categories below them. Risks can only be assigned to categories that have no sub-categories.



List: a tree with the column Name (shown in the language of the current user when a translation exists). Click the arrow in front of a row to open its sub-categories. Search box and filter row are available.

Toolbar:

- Green plus: adds a new category. If a row is selected, the new category is added below it (as its sub-category); if nothing is selected, a new top-level area is added. If the selected category has already been used in a risk log, the message "Cannot add entry due to: Selected risk category has already been assigned to a risk log." appears and nothing is added.
- Reorder button (hint "Reorder"): opens the drag-and-drop dialog for the categories on the same level as the selected row (top-level areas when nothing is selected). Confirm with "Reorder". Grey while there are unsaved changes.

- Expand all / Collapse all: open or close all levels of the tree. Collapse all also clears the selection.
- Red trash in a row: deletes the category after confirmation. Categories that are used in risk logs cannot be deleted.

Details:

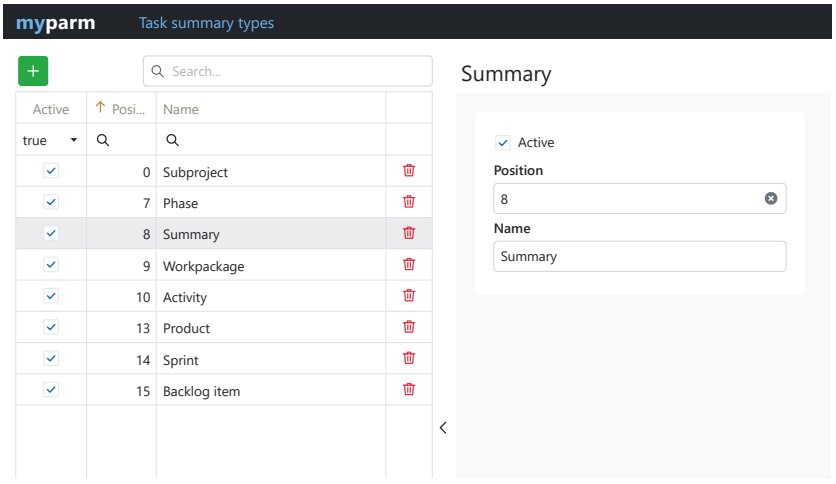
- Active: checkbox; shown only for categories without sub-categories. Inactive categories are no longer offered when risks are logged.
- Name: required, up to 100 characters, unique among the categories on the same level.
- Description: optional, up to 250 characters.
- Translations (box): grid with the columns Language and Caption that holds the name of the category in other languages. Green plus opens a dialog with "Language" (drop-down of the active languages; languages already used are not offered) and "Caption" (required, up to 512 characters); Cancel / OK. The green pencil (or a double-click) edits a translation (in this case the language cannot be changed), the red trash removes it after "Do you really want to delete this item?".

Click Save to store the category and its translations.

8.9 Task summary types

Menu: Admin > Tables > Task summary types. Page header: "Task summary types".

Task summary types are the types that can be assigned to summary tasks (tasks with sub-tasks) in the project structure.



List columns: Active, Position, Name (sorted by Position).

Toolbar: green plus (add), red trash per row (delete after confirmation).

Details:

- Active: checkbox.
- Position: required whole number (0 or higher) that defines the order; it must be unique.

- Name: required, up to 32 characters.

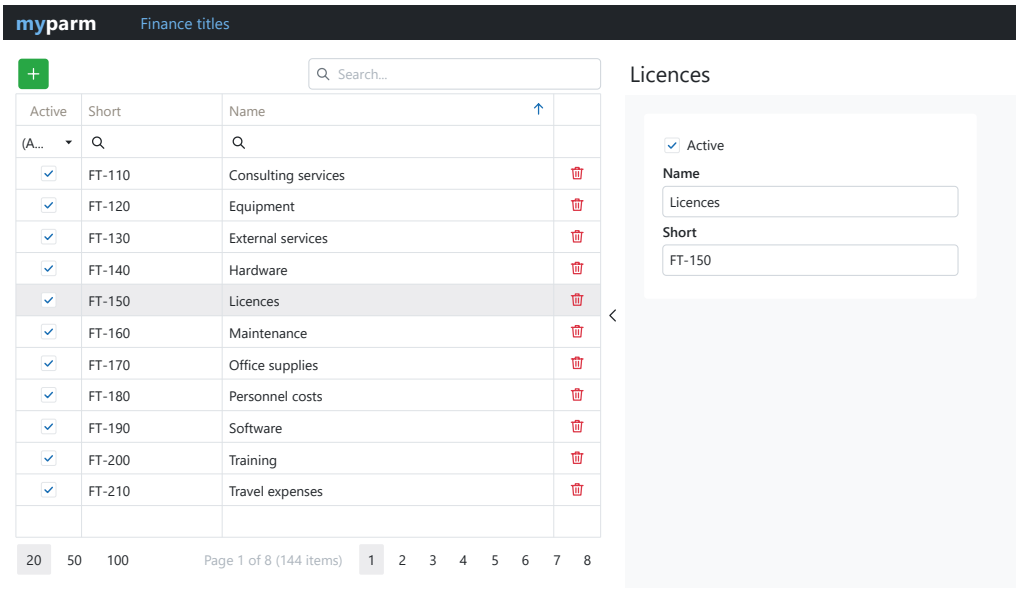
At least one summary type must remain active: if you try to deactivate or delete the last active type, the message "At least one active summary type must exist." appears and the list is reloaded.

Click Save to store the summary type.

8.10 Finance titles

Menu: Admin > Tables > Finance titles. Page header: "Finance titles".

The screen (and the menu entry) is available only when a Parm administrator has enabled supplier contracts for the installation. Finance titles are the budget titles used in supplier contracts. In Contract management you assign every contract value and every additional related cost to a title (column "Title"). The contract yearly distribution is shown per title. The cost plan and the contract data of a project also refer to the title ("Finance title").



List columns: Active, Short, Name (sorted by Name).

Toolbar: green plus (add), red trash per row (delete after confirmation). A title that is used in a contract cannot be deleted.

Details:

- Active: checkbox; inactive titles are no longer offered in contracts.
- Name: required, up to 200 characters.
- Short: required, unique, up to 20 characters. The short code is what is displayed in the contract grids.

Saving: on this screen the Save button is a round button with a disk icon at the bottom right of the page. It is disabled while nothing is selected and highlighted when there are valid unsaved changes.

9. Imports and exports

9.1 Overview

The **Admin** menu contains two submenus for file exchange:

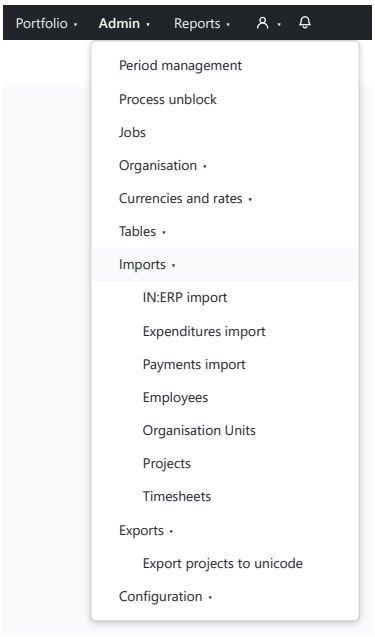
- **Imports** – pages where you upload text/CSV files that create or update data in myPARM (projects, expenditures, bills, payments, and any "universal" CSV import definitions).
- **Exports** – currently one page, **Export projects to unicode**, which downloads a text file with the project structure.

In addition, every "universal" CSV import definition that a Parm administrator has activated appears as its own entry in **Admin** > **Imports** (see Universal CSV imports).

All pages in this chapter require the **Admin** licence. Which entries you see depends on access rights and on how a Parm administrator has configured the installation:

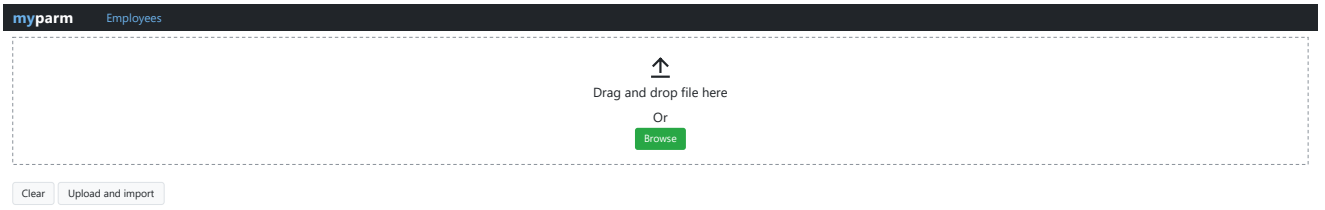
Menu entry	Shown only if the access right ...	... and the condition ...
Imports > IN:ERP import	Admin	switched on by a Parm administrator
Imports > Bills import	Can import financial data	Sage bills import switched on by a Parm administrator
Imports > Expenditures import	Can import financial data	variant Standard, Sage or XperLine set by a Parm administrator (exactly one variant is shown, with the same menu label)
Imports > Payments import	Can import financial data	variant Standard or Sage set by a Parm administrator (one variant is shown)
Imports > (universal import entries)	Admin	activated by a Parm administrator
Exports > Export projects to unicode	Admin	switched on by a Parm administrator

The access right "Can import financial data" is described in the roles screen as "Gives access to expenditures and payments import."



9.2 The import page (common to all imports)

Every import page looks the same. Only the page header, the accepted file type and the file size limit differ.



Upload area

- **Drag and drop file here / Or / Browse** – drop one or more files onto the dashed area, or click **Browse** to open the file dialog. The file dialog only offers files with the extension expected by the page (see the description of each import in this chapter). Files with a different extension are not accepted.
- The names of the selected files are listed under the upload area. Dropping or selecting further files adds them to the list; a file with the same name is not added twice.
- Universal CSV imports accept **only one file**. If a file is already selected and you select another one, the first one is replaced.
- The toolbar **plus** button (where available) also opens the file dialog; the toolbar **save** button has the same effect as **Upload and import**.

Buttons

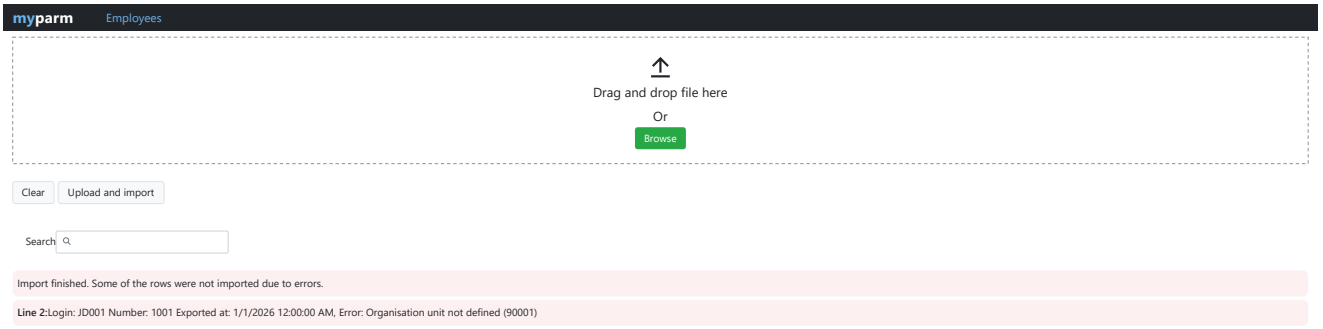
- **Clear** – removes all selected files and clears any previous result list. The button is red while files are selected.

- **Upload and import** – sends the selected files to the server and starts the import. The button is green while files are selected; clicking it without a file does nothing.
- If one of the files is larger than the allowed size, the message "One of the files size is over 10MB." (or "... over 100MB." for universal imports) appears and nothing is uploaded.

Result list

After the import the file list is replaced by the result list:

- Each message is a panel. Panels are colour-coded by severity: red for errors, orange for warnings, green for information.
- A message that refers to a specific line of the file starts with **Line** and the line number (for example "Line 12: ...").
- The list always contains one summary message, shown at the top. After a successful import it is a green information panel "Import has been completed successfully."; otherwise it is a red error panel whose text depends on the import, for example "Import finished. Some of the expenditures were not imported due to errors." or, for the universal CSV imports, "Import finished. Some of the rows were not imported due to errors."
- Above the list a **Search** box lets you filter the messages by text; the clear icon in the box shows all messages again.
- Selecting or dropping a new file clears the result list.



General rules for the classic file imports (IN:ERP, Bills, Expenditures, Payments)

- Several files can be uploaded at once; they are processed one after the other.
- The maximum size is 10 MB per file.
- Files are read with the file encoding that a Parm administrator has set for the installation.
- Dates are expected as day.month.year (for example 31.12.2025); this does not apply to the IN:ERP import.
- Decimal numbers use a point as decimal separator; an apostrophe may be used as thousands separator (not in the Bills and IN:ERP imports).
- Processing stops after a large number of line errors; a warning marks the end of the aborted import.

9.3 IN:ERP import

Page header: **IN:ERP project import**. Menu: Admin > Imports > **IN:ERP import**. Shown only to users with the access right **Admin** when a Parm administrator has switched on the IN:ERP import for the installation. If it is switched off while the page is open, the server rejects the upload (no import is performed).

Imports a project structure (projects, sub-projects and tasks) from text files exported by IN:ERP.

- Accepted files: **.txt**, several files at once, up to 10 MB each.
- The file name decides what a file contains: a name starting with **PRO** is a projects file, **SPR** a sub-projects file, **TSK** a tasks file. A file with any other name produces an "unknown file type" message and is skipped.
- The files have **no header row**; the columns must be in the fixed order of the column list, separated by semicolon or comma. Empty lines are ignored.
- Dates and numbers must be written as the IN:ERP export delivers them.

Projects file (PRO...): Number (required), Name (required), Start date (required), End date (required), Leader (required, employee short name), Leader 2 (required), Active (yes/no).

Sub-projects file (SPR...): Project (required), Sub-project (required), Name (required), Customer type (required), Leader (required), Leader 2 (required), Type (required), Status (required, 1 character), Customer, Bill to, Value (required, decimal), Value type (required, 1 character), Vart (1 character), Active (yes/no), Bonus (yes/no), ERG (yes/no), Start (required), End (required), Invoice tab, Department (required).

Tasks file (TSK...): Project (required), Sub-project (required), Task (required), Parent, Name (required), Active (yes/no), Accept time (1 character), Accept expenses (up to 3 characters), Accept deliverables (1 character), Start (required), End (required), Comment.

Result: line messages per file, followed by the summary "Import has been completed successfully." or "Import finished. Some of the rows were not imported due to errors."

9.4 Bills import

Page header: **Bills import**. Menu: Admin > Imports > **Bills import**. Shown only to users with the access right **Can import financial data** when a Parm administrator has switched on the Sage bills import for the installation. If it is switched off, the server refuses the upload.

Imports customer bills exported from **Sage**.

- Accepted files: **.txt**, several files at once, up to 10 MB each.

- The file is **tab-separated** and must start with a **header row**. Columns are identified by their header name, so their order does not matter. Empty lines are ignored.
- Dates: day.month.year. Decimals with a point, no thousands separator.

Columns (Sage names): Header_Line_Zeile (required, 1 character – marks header and line records), Belegnr, Belegdatum, Belegart, Kontoart, Kontonr, Projekt, Betrag_Netto, Betrag_Brutto, Beschreibung, Waehrungscode, Betrag_Netto_MW, Betrag_Brutto_MW, Gegenkontonr, Kostenstelle, Gegenkonto_Projekt, Gegenkonto_Betrag, Gegenkonto_MWST_Betrag, teqnbr, lfnbrd.

Summary message on failure: "Import finished. Some of the bills were not imported due to errors."

9.5 Expenditures import

Page header: **Expenditures import**. Menu: Admin > Imports > **Expenditures import**. Shown only to users with the access right **Can import financial data**. Exactly one of the three variants is available (Standard, Sage or XperLine), depending on the variant a Parm administrator has set for the installation; the menu label is the same in all cases.

Imports expenditures (accounts payable / expenses) booked in the financial accounting system onto project activities. Several files can be uploaded at once, up to 10 MB each. Summary message on failure: "Import finished. Some of the expenditures were not imported due to errors."

Standard variant

- Accepted files: **.csv**.
- No header row; columns in the fixed order of the column list, separated by semicolon or comma. Empty lines are ignored. Dates day.month.year, decimals with a point (apostrophe as optional thousands separator).
- Columns: Project (required, short name), PLA (required, short name), Activity (short name, optional), Date (required), Cost account (required, short name), Units, Unit price, Net amount, VAT code, Gross amount, Comment (up to 1000 characters), Supplier (short name), Currency code (3 characters).

Sage variant

- Accepted files: **.txt**.
- Tab-separated with a **header row**; columns are matched by header name.
- Columns (Sage names): Belegnummer (required), Belegdatum (required), Projektnummer (required), Betrag_Netto_MW (required), Betrag_Brutto_MW (required), Betrag_Netto

(required), Betrag_Brutto (required), Währungscode, Kostenart, Kontonummer (required), Verrechenbar, Buchungstext, Mandant.

XperLine variant

- Accepted files: **.txt**.
- No header row; columns in the fixed order of the column list, separated by semicolon or comma.
- Columns: Expense ID / document number (required), Task as Project.PLA.Activity (required), Supplier / credit company (required), Date of booking (required), Net amount, Account (required), Booking text / comment, VAT code, Currency code, Net amount in foreign currency, Employee code, Payable amount, Export track / client reference, Mandant, Units (quantity), Unit price.

9.6 Payments import

Page header: **Payments import**. Menu: Admin > Imports > **Payments import**. Shown only to users with the access right **Can import financial data**. One of two variants is available (Standard or Sage), depending on the variant a Parm administrator has set for the installation.

Imports incoming payments and matches them to bills. Accepted files: **.txt**, several at once, up to 10 MB each. Summary message on failure: "Import finished. Some of the payments were not imported due to errors."

Standard variant

- No header row; columns in the fixed order of the column list, separated by semicolon or comma. Dates day.month.year, decimals with a point (apostrophe as optional thousands separator).
- Columns: Transaction type (required, 1 character), Subproject, Bill ID (required), Payment date (required), Gross amount, Payment text, Currency code, Gross amount in foreign currency, Pay track (required), Pay bill track, Pay type.

Sage variant

- Tab-separated with a **header row**; columns are matched by header name.
- Columns (Sage names): Belegnr_Zahlung (required), Rechnungsnummer (required), Debitorenummer (required), Ausgleichsdatum (required), Ausgleichsbetrag (required), Ausgleichsbetrag (MW) (required), Mandant_NR, Mandant.

9.7 Universal CSV imports (Employees, Projects, Timesheets, Organisation Units, ...)

Below the fixed entries, the **Imports** submenu lists one entry per CSV import definition that a Parm administrator has activated. The entries are shown only to users with the access right **Admin**. Predefined definitions appear with a translated name (**Employees**, **Projects**, **Timesheets**, **Organisation Units**); customer-specific definitions appear with the internal name entered when the definition was created. The page header shows the same name.

How the page works:

- Accepted file: **.csv**, **one file only**, up to **100 MB**.
- The file must have a **header row**. The column separator (comma, semicolon, tab ...) is detected automatically. The file is read with the encoding that a Parm administrator has set for the definition.
- Each header name must match a column of the import's target table (upper/lower case does not matter; spaces and special characters in a header count as underscores). If the file contains a column that the target does not know, the whole file is rejected with "CSV file contains extra columns not found in the target table: ...". Columns that are missing in the file are treated as empty.
- Each row is checked:
    - empty required column: "Error while parsing row number 'n': value of 'Column' was expected to be not null";
    - value that cannot be converted to the column type (number, date, yes/no): "... error occurred while trying to cast 'Column' to 'type' type";
    - text that is too long: "... value of 'Column' was expected to be maximum 'n' length".

  Yes/no columns accept true/false or 1/0.
- If the definition has **Delete before import** switched on, the previously imported rows of that target are deleted before the new file is loaded.
- If the definition has **Allow partial import** switched off, a single row error prevents the whole file from being imported ("Failed to import. All 'n' rows were not imported." or the row messages followed by "Import finished. Some of the rows were not imported due to errors."). If it is switched on, the valid rows are imported and the faulty rows are listed.
- After loading, the definition's post-processing (for example creating the employees, projects or timesheet entries from the loaded rows) runs. Rows rejected in this step are reported with their line number followed by "Import finished with errors. n rows were not post processed."
- Summary message: "Import has been completed successfully." when nothing failed; otherwise one of the messages described for partial import and post-processing. A technical problem gives "Unexpected error occurred: ...".
- Reading stops after 500 faulty rows.

Expected columns of the predefined imports (header names, standard installation; customer-specific installations may have additional columns – confirm with Parm AG):

- **Employees**: Short (required), Login (required), FirstName (required), LastName (required), Number (required), Gender (F or M), BirthDate, StartDate (required), EndDate, IsActive (required), BaseCostRate (required), CalculatoryFullCostRate (required), InternalCategoryName (required), ExternalCategoryName (required), EmploymentRateValidFrom (required), OrganisationUnitNumber (required), OrganisationUnitValidFrom (required), EmploymentType (required: Trainee, Freelancer, HourlyPaid, FullTime or Apprentice), IsForeign (required), WorktimeCalendarName (required; the calendar must exist and be active), Engagement (required), EmploymentModelValidFrom (required), ExportDate (required), Email.
- **Projects**: ProjectContainerShort (required), IsActive (required), ProjectNumber (required), ProjectShort (required), ProjectName (required), ProjectDescription, ProjectStartDate (required), ProjectEndDate (required), ProjectLeaderShort (required), ProjectLeaderDeputyShort, OrganisationUnitShort (required), PortfolioName, ProjectTypeName, ProjectClassName, ProjectPhaseName, CustomerShort, SupplierShort, CountryIso2Code, Probability, ProjectBudget, WorkflowVariantName.
- **Timesheets**: EmployeeShort (required), ProjectShort, PlaShort, ActivityShort, ProjectName, PlaName, ActivityName, Date (required), Duration in minutes (required), StartTime, EndTime, Comment, InternalComment, CostAccountShort (required), BaseCostAmountInTransactionCurrency (required), BaseCostTransactionCurrencyCode (required), BaseCostAmountInSystemCurrency (required), FullCostMinutes (required), FullCostAmountInTransactionCurrency (required), FullCostTransactionCurrencyCode (required), FullCostAmountInPlaCurrency (required), FullCostAmountInSystemCurrency (required), SellingDuration (required), SellingAmountInTransactionCurrency (required), SellingAmountTransactionCurrencyCode (required), SellingAmountInPlaCurrency (required), SellingAmountInSystemCurrency (required), IsApprovedOnProjectLevel (required), IsBillable (required), IsInvoiced (required). Partial import is not allowed for this definition: the whole file is rejected if any row is faulty.
- **Organisation Units**: Number (required, unique), Name (required), ShortName (required, unique), ParentNumber (required), ElementType (required, 1 character), CostCentreShortName, ActiveFrom (required).

9.8 Export projects to unicode (Admin > Exports)

Page header: **Export projects to unicode**. Menu: Admin > Exports > **Export projects to unicode**. Shown only to users with the access right **Admin** when a Parm administrator has switched on the export for the installation.

The page contains one button:

- **Export** – generates the file and downloads it as `projects_unicode_export.txt`. The button accepts only the first click until the download has started, so clicking twice does not create two files.

The file is a UTF-8 text file with tab-separated columns and a header row. One line per project activity, sorted by activity short name. Columns: PR_CODE (activity short name), PR_NAME (activity name), PR_HAUPTPR_NAME (project name), PR_AKTIV (active), PR_NOT_BELASTBAR (bookable), PR_STUFE (level), PR_UP_EXISTS (has sub-elements), PR_KOSTEN_ST (cost centre short name), PR_ABTEILUNG (organisation unit number), PR_VIS (project leader short name), Mandant_NR, Mandant, StartDate, EndDate (dates in ISO format year-month-day). The column names are fixed because the file is intended for a third-party system.

There are no options on this page. If there is no data to export, no file is downloaded.

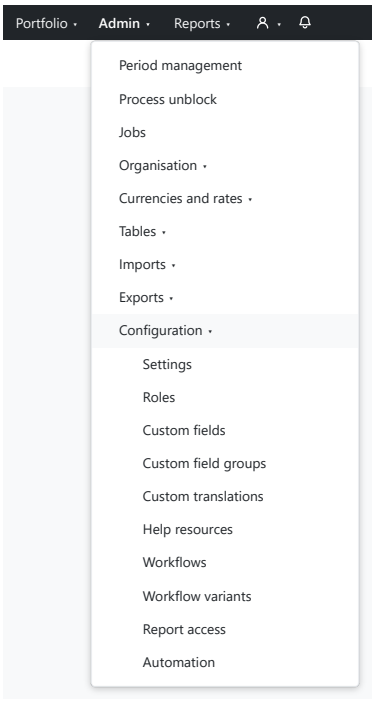
10. Configuration: settings, roles, custom fields, translations and help resources

10.1 Where to find these screens

Open the **Admin** menu in the top bar and choose **Configuration**. The submenu lists the configuration screens. A menu entry is shown only if you hold the matching access right and the Admin licence:

Menu entry	Required access right	Other conditions
Settings	Maintain application settings	–
Roles	Maintain roles	–
Custom fields	Admin	Hidden in the SaaS Standard version
Custom field groups	Admin	Hidden in the SaaS Standard version
Custom translations	Can maintain translations	–
Help resources	Admin	–

The entries Workflows, Workflow variants, Report access, Custom reports and Automation are described in 11. Configuration: workflows, reports, automation and user menu.



10.2 Settings

The "Settings" screen contains the technical configuration of the application. Most values influence the behaviour of the whole system for all users. Change them only in consultation with Parm.

Screen layout

- **Search** (top left) – a search box with a clear button. Filtering starts while you type. A card stays visible when its group title matches the text, or when at least one setting name or description inside it matches. Settings that do not match are hidden inside the card.
- **"!" icon** (top right) – click it to scroll to the first setting that contains an invalid value. If the search filter hides the faulty setting, the message "The search is applied and the wrong values cannot be shown, please remove the search criteria." appears. Clear the search and click the icon again.
- **Setting cards** – one white card per setting group. The card title is the group name. Inside the card every setting shows:
  - its **name**,
  - a **description** explaining the purpose and allowed values,
  - an **input control** whose type depends on the setting: a drop-down list with predefined values (with a clear button), a text box, a one-character box, a number box (whole numbers, sometimes with a permitted minimum and maximum), a number box with two decimals, a multi-line text area, a date picker, or a checkbox (for yes/no settings the description is shown as the checkbox text).
  - Settings that must not be empty are validated; an empty value is marked as an error.
- **Save** – the round button with the save icon in the bottom-right corner (tooltip "Save").

Which settings do you see?

Some settings are maintained only by Parm administrators, so customer administrators see fewer settings. The groups are therefore not identical on every installation. The settings visible to customer administrators are listed in 10.10 Appendix: Settings available to administrators.

Setting groups (card titles) and typical examples

Groups visible to customer administrators:

- **Bsc** – the number of past periods used for the long trend calculation and shown in the history chart of the BSC cockpit.
- **Budget** – the default cost element and whether material cost accounts are used by default in advanced budget creation.
- **Chat** – the traffic lights of duties and of the messenger: switched on or off, and the number of days after which they turn orange or red.
- **General** – the date format and separator, the decimal and group separators and the display precision used for imports, exports and reports; the language and the dialect; the planning selling rate for resource management; the maximum idle time after which a workflow process is unblocked automatically; whether "send notifications" is preselected for new log actions and collaboration entries.
- **Invoicing** – the "Due" column of the invoice portal and the number of days after which its traffic light turns orange or red.
- **Mobile** – the activity format in the mobile timesheet (`Mobile.Tet.ActivityFormat`); see the manual "Mobile timesheet".
- **PasswordPolicy** – minimum password length; whether digits, upper-case, lower-case and special characters are required; whether personal information is forbidden; how many of the policies must be fulfilled.
- **Payments** – the source directory of the payment file import.
- **Project** – the default zoom level of the Gantt chart; whether the selected organisation unit is marked in the TET restrictions of new projects; whether PLAs can be used only on activity level; the mappings used by the IN:ERP import.
- **Reports** – the help URL of the project status report; the position of the total column in the time recording report; the default values of the "show billable / non billable entries" parameters.
- **ResourceManagement** – whether only employees of the logged-in employee's tenant can be added to the resource plan.
- **SAP** – the import source directory and the obligo cost account.
- **Synchronizer** – the default organisation unit for employees imported with the Synchronizer.
- **Timesheet** – the allowed minutes precision; whether added activities are sorted automatically; whether activities already in the timesheet are left out of the recently used

list.
- **uniFLOW** – the import source directory and the export output directory.

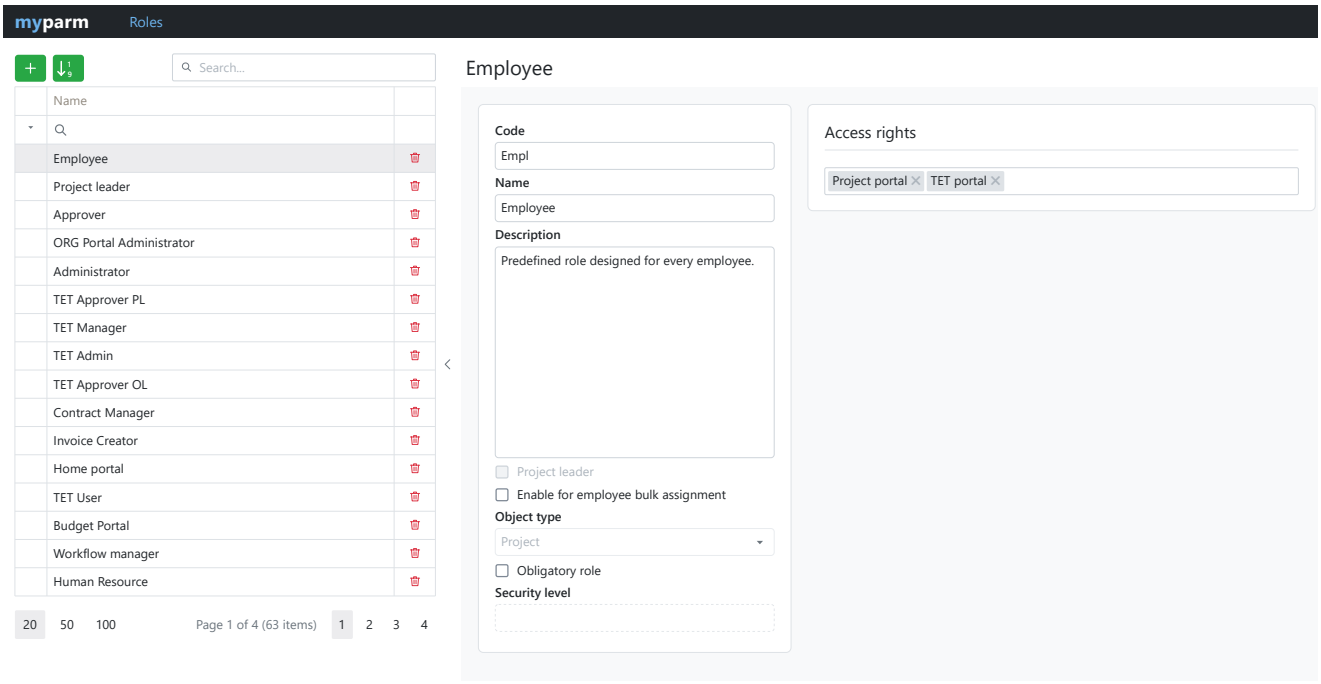
Changing settings

1. Use **Search** to find the setting, or scroll to its card.
2. Change the value. Changed settings are remembered until you save.
3. Click the round **Save** button.
   - If nothing was changed, nothing happens.
   - If a value is invalid, the message "There are missing or wrong values in this form." appears. Use the "!" icon to find it.
   - Otherwise the message "Application settings have been saved and the application will be reloaded." appears. Confirm it; the application reloads so that the new values take effect everywhere.
4. If you leave the screen with unsaved changes, the warning "Are you sure you want to leave without saving? All of your changes will be lost." appears.

10.3 Roles

The "Roles" screen manages the roles of the application. A role bundles access rights; a role is assigned to employees (HR module) or to team members of objects such as projects, organisation units or contracts. Predefined roles are delivered with the application; you can add your own. The screen is available to users with the access right "Maintain roles".

Roles also decide who performs the steps of a process and who may use a workflow variant. Recommendations for choosing the roles of process steps are given in the manual "Processes, Workflow Variants and Custom Fields" (in the help menu: "Manual: Workflows for administrators"); how roles are used in project teams is described in the manual "Project creation and management".



Role list (left)

- Toolbar:
  - **Plus** button – adds a new, empty role and opens it in the detail panel. The button is green when there are no unsaved changes. While there are unsaved changes the button is grey and does nothing; save first.
  - **Reorder** button (sort icon, tooltip "Reorder") – opens a popup with the roles as a draggable list. Drag the entries into the desired order and click **Reorder** to store the order, or **Close** to cancel. The order is used wherever roles are listed. If there are unsaved changes the message "Save your changes to be able to reorder items." appears; if there are too few roles, "There is too little items to perform reordering." appears.
  - **Search** field and the drawer button to collapse/expand the list.
- Columns:
  - an unnamed first column that shows an orange warning triangle when the role is not configured correctly (tooltip "The access rights of this role are more powerful than its security level."),
  - **Name**,
  - a red **trash** icon per row to delete the role.
- A filter row under the headers, paging with a page-size selector, single-row selection. Click a role to open it in the detail panel.

Deleting a role

1. Click the trash icon of the role. The role is selected first.
2. Confirm the question "Do you really want to delete "<name>"?".
3. If the role is still in use, the message "<name> cannot be deleted due to existing entries." appears and the role stays.

Role details (right)

The header shows the role name. The first card contains the main attributes:

- **Code** – required, max. 10 characters, must be unique.
- **Name** – required, max. 50 characters, must be unique.
- **Description** – optional multi-line text, max. 1000 characters.
- **Project leader** – read-only checkbox; marks the predefined project leader role. It cannot be changed here.
- **Enable for employee bulk assignment** – checkbox; tooltip "If checked, this role can be used for bulk employee assignment as log assignees."
- **Object type** – drop-down with a clear button. Select the object type the role belongs to (e.g. project or organisation unit; the list comes from the server). Once a role with an object type has been saved, the object type can no longer be changed.
- **Obligatory role** – checkbox; enabled only when an object type is selected. If you clear the object type, the checkbox is cleared automatically.
- **Security level** – read-only. It is calculated from the selected access rights (see "Security levels" in this section).

The second card, **Access rights**, contains the access right selector:

- A tag box that shows the selected access rights as tags, sorted alphabetically (up to 20 tags are displayed individually, further ones are summarised).
- Open the list to see all access rights with a checkbox each. Every entry shows the right's **name** in bold, the line **Security level: <level>** in italics and the **description**.
- Use the search field inside the list to search by name or description.
- Tick or untick rights and confirm with **Apply** (or discard with **Cancel**).

Security levels

Every access right has a security level: Administrator, HR Manager or Employee (from the most powerful to the least powerful). Higher levels are reserved for Parm administrators. Four access rights define the level of a role: "Admin" and "Maintain roles" (Administrator), "Human Resources portal" and "Can access simple user management" (HR Manager). The **Security level** field of the role shows the most powerful level among these defining rights. A role is reported as incorrectly configured (orange triangle in the grid, validation error "The access rights of this role are more powerful than its security level.") when it contains an access right whose level is more powerful than the role's own level. Correct the configuration by adding a defining access right of the matching level or by removing the access right that is too powerful. A role that contains none of the level-defining access rights has an empty **Security level** field and is not validated: it is never reported as incorrectly configured, whatever access rights it contains.

Saving

- Click **Save** (bottom right). The button is green when the role has unsaved, valid changes and is disabled when no role is selected.
- Invalid values (empty Code/Name, duplicate Code/Name, security level violation) produce the message "There are missing or wrong values in this form."
- Leaving the screen with unsaved changes shows "Are you sure you want to leave without saving? All of your changes will be lost."
- If another user changed the same role in the meantime, the role is reloaded.

Predefined roles

The following roles are delivered with the application (code – name – description as stored in the application):

Code	Name	Description
Empl	Employee	Predefined role designed for every employee.
PL	Project leader	Predefined role designed for every leader of a project.
Apr	Approver	Predefined role designed for every approver a project.
OrgManager	ORG Portal Administrator	Predefined role designed for only for ORG Portal administrator.
Admin	Administrator	Predefined role designed for every company administrator of the system.
TetAprPl	TET Approver PL	Predefined role designed for project level approver of TET entries.
TetManager	TET Manager	Predefined role designed for TET manager.
TetAdmin	TET Admin	Predefined role designed for TET admin.
TetAprOl	TET Approver OL	Predefined role designed for organisation level approver of TET entries.
ContrMan	Contract Manager	Predefined role designed for contract manager.
InvCreator	Invoice Creator	Predefined role designed for invoice creator.
InvAdmin	Invoice Admin	Predefined role designed for invoice admin.
FinManager	Financial Manager	Predefined role designed for financial manager.
AdHocInvCr	Ad-hoc Invoice Creator	Predefined role designed for ad-hoc invoice creator.
PRBoard	Board	Predefined role designed for board manager reporting workflow approval.
PRInit	Reporting workflow initiator	Predefined role designed for initiating reporting workflow.

Code	Name	Description
PRCountry	Country Manager	Predefined role designed for country manager reporting workflow approval.
HrManager	HR Manager	Predefined role designed for HR Manager.
CsManager	C&S Manager	Predefined role designed for C&S Manager.
TmpltAdmin	Task Template Administrator	Gives access to maintain task templates

(Installations may contain additional customer-specific roles.)

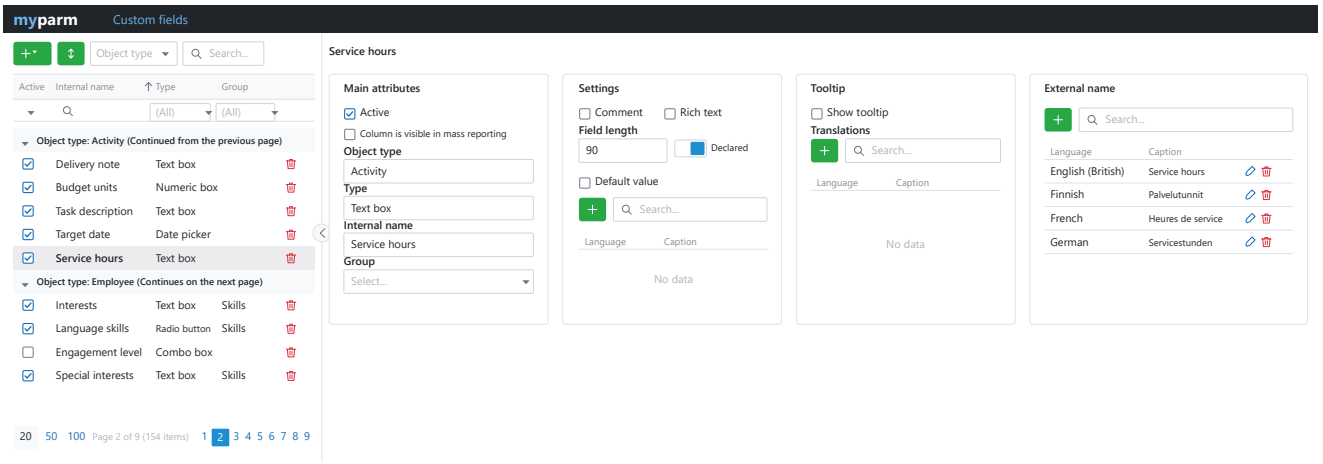
10.4 Custom fields

Custom fields extend the standard data of projects, activities, employees and contracts with your own fields. A custom field belongs to exactly one object type:

Object type	Where the values are stored / shown
Project	Project attributes (*Custom fields* panel), portfolio
Activity	Activities and PLAs in the project structure
Employee	Employee administration page
Contract	Contract administration page

On this screen you define the fields. Where *Project* and *Activity* fields appear is controlled in Workflows (see Custom fields assignment) and, for projects with a variant, in Workflow variants. The screen is available to users with the access right "Admin"; it is hidden in the SaaS Standard version.

More details – how custom fields, workflow steps and variants work together, and what the user sees in a process – are given in the manual "Processes, Workflow Variants and Custom Fields" (in the help menu: "Manual: Workflows for administrators"). How the custom fields are laid out in the project attributes is described in the manual "Project creation and management".



Custom field list (left)

- Toolbar:
  - **Plus** drop-down button – opens the list of field types. Click a type to create a new field of that type:
    Check box, Combo box, Date picker, Identifier box, Numeric box, Radio button, Text block, Text box, Traffic light, Value based traffic light.
    The button is disabled while there are unsaved changes.
  - **Reorder** button – reorders the custom fields of the object type of the currently selected field. This order is used in read-only views and in views that are not connected to workflows, such as HR and contract management. The order on a workflow step is set separately in "Custom fields assignment". If no field is selected, the message "Please select an element to be able to reorder items." appears; with unsaved changes "Save your changes to be able to reorder items." appears.
- The list is grouped by object type; groups can be collapsed. Columns: **Active**, **Internal name**, **Type**, **Group** (shown only when at least one custom field group exists), and a red trash icon per row.
- Search field, filter row, paging. Sorting is fixed to the defined order.
- Delete: confirm "Do you really want to delete "<internal name>"?". A field that is still in use cannot be deleted ("<name> cannot be deleted due to existing entries."). Deactivate a field instead of deleting it when it already holds values.

Custom field details (right)

The header shows the internal name. The detail panel consists of up to four cards.

Card 1 – main attributes

- **Active** – checkbox. Only active fields are shown in processes and can be assigned to steps or variants. Deactivating a field does not remove its assignments to workflow steps or variants; after it is activated again, it is shown again.
- **Column is visible in mass reporting** – checkbox, shown only for fields of the object type Activity; makes the field available as a column in mass reporting.

- **Object type** – required drop-down: Activity, Contract, Employee, Project. Read-only after the field has been saved.
- **Type** – read-only; the type chosen in the plus drop-down.
- **Internal name** – required, max. 128 characters, must be unique within the object type. Rule: "Only letters, numbers, underscores and spaces are allowed. The name must start with a letter." Read-only after the field has been saved. The internal name is used in reports; the text shown to users is defined in the "External name" card.
- **Group** – optional drop-down with the custom field groups (see Custom field groups); has a clear button. Fields of the same group are shown together in the *Custom fields* panel.

Card 2 – Settings (not shown for Date picker; content depends on the type)

- **Check box**: "Checked by default".
- **Text block**: "Bold".
- **Identifier box**: "Field length" (1–999, default 10).
- **Text box**: "Comment" (multi-line) and "Rich text" checkboxes; they exclude each other, and neither has to be ticked. "Field length" (default 40) with a switch between "Declared" (enter a length from 1 to 4000; a higher value is changed to 4000) and "Max" (the length box shows "N/A"). When "Rich text" is ticked, the switch is set to "Max" and disabled; when it is unticked again, the previously entered length is restored. "Default value" checkbox plus a translations grid where the default text is entered per language.
- **Numeric box**: "Decimals" (0–9, default 0), "Integer part length" (1–15, default 15), "Unit" with the options "None", "Currency" (choose one of the active currencies; the system currency is preselected) or "User defined" (enter a unit of up to 5 characters).
- **Traffic light**: "URL" – shown in the definition, but currently has no effect.
- **Value based traffic light**: "URL" (shown, but currently without effect), the numeric options (Decimals, Integer part length, Unit) and the required thresholds "Warning level" and "Critical level". A new field of this type cannot be saved until the thresholds are entered.
- **Combo box** and **Radio button**: the list of selectable values.
  - Click the green **plus** to add a value. Values can be dragged into the desired order; a value is removed with its delete icon as long as the field has not been saved. After the field has been saved, its values can no longer be deleted; values added later are also available in existing objects. The default value is shown in bold; a red error icon marks an incomplete value.
  - For the selected value: **Default** checkbox; **Reported value** (required, max. 256 characters, unique; this is the value stored and shown in reports; read-only after saving); and a translations grid with the **Caption** shown to users per language.

Card 3 – Tooltip

- **Show tooltip** checkbox. When it is ticked, a question mark icon is shown next to the field name; the tooltip appears when the user hovers over the icon.
- **Translations** grid: the tooltip text per language.

Card 4 – External name

- Translations grid with the field caption shown to users per language. If no external name is given, the internal name is shown.

Translations grids (used for captions, tooltips and default values): columns **Language** and **Caption**, a green **plus** button, a green pencil and a red trash icon per row; double-click a row to edit. Add/edit opens a popup with **Language** (drop-down of active languages; each language only once; read-only when editing) and **Caption** (required, max. 512 characters) with **OK** and **Cancel**.

Default values

A default value can be defined only for Check box, Text box, Combo box and Radio button fields. It is applied when a new object is created; the user can overwrite it, and if the user does not change it, it is saved as the field value. For projects and activities it is applied only to the fields visible on the current workflow step and, for a project with a variant, contained in the variant. Default values do not change existing objects: adding or changing a default value, or adding a new field with a default value, affects only objects created afterwards.

Saving

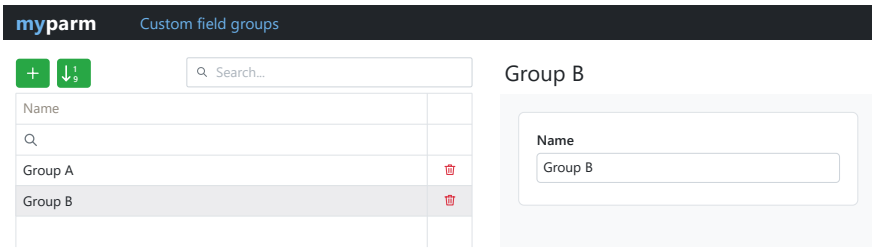
Click **Save** (bottom right). Missing required values produce "There are missing or wrong values in this form." Leaving with unsaved changes shows the unsaved-data warning.

Procedure: creating a combo box field for projects

1. Open the plus drop-down and click **Combo box**.
2. Select the **Object type** "Project" and enter the **Internal name**.
3. In **Settings** click the plus, enter the **Reported value**, add a **Caption** per language and tick **Default** for the preferred value. Repeat for each value.
4. Enter the captions in **External name** (and optionally a tooltip).
5. Click **Save**.
6. Assign the field to the workflow steps where it should appear (see Custom fields assignment).

10.5 Custom field groups

Custom field groups let you organise custom fields into named groups. A group is selected in the **Group** field of a custom field; the order of the groups defined here is the order in which the groups are presented. The screen is available to users with the access right "Admin"; it is hidden in the SaaS Standard version.



Group list (left)

- **Plus** button – adds a new group (grey and inactive while there are unsaved changes).
- **Reorder** button – opens the reorder popup (drag the groups, then click **Reorder**); the same messages as on the Roles screen apply.
- Column **Name**, red trash icon per row, search field, filter row, paging.
- Delete: confirm "Do you really want to delete "<name>"?". A group can also be deleted when custom fields are assigned to it; these fields lose their group and are then shown in the "Ungrouped" panel.

Group details (right)

- **Name** – required, max. 50 characters, must be unique.

Click **Save** to store the group. The group then appears in the **Group** drop-down of the Custom fields screen and as an additional **Group** column in the custom field list. Each custom field can belong to at most one group. The Group field is not available for MIS attributes.

As soon as at least one displayed custom field has a group, the custom fields switch from a flat list to collapsible group panels. This applies to the project attributes, HR, contract management, the Activity details popup of the project structure and the Add Project / Add Idea popup of the portfolio. There is one panel per group, in the order defined here, plus an "Ungrouped" panel for fields without a group, placed after all groups. A group without visible fields has no panel; when all displayed fields are grouped, there is no "Ungrouped" panel. When the view is opened, the first panel is expanded. Several panels can be open at the same time, and all panels can be collapsed. For details see the manual "Project creation and management".

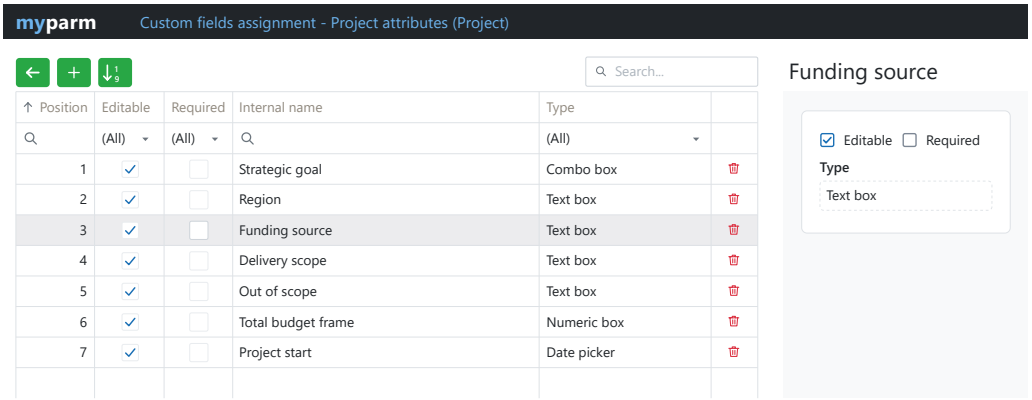
10.6 Custom fields assignment (opened from Workflows)

A custom field is shown to the user only when it is assigned to a workflow step. This page defines which custom fields are shown on a given workflow step, and whether they can be edited and are required there. To open it, select a workflow and a step on the Workflows screen. The detail panel shows one card per object type supported by the step (*Project*, *Activity*) with the fields already assigned. Click the green **pencil** button in the card header to open the assignment page for that object type. The page is available to users with the access right "Workflow management".

Which object types can be assigned to which steps is defined during the initial set-up. In the standard configuration:

Workflow / step	Object types
Initiate project → Project attributes	Project
Initiate project → Project structure	Project, Activity
Edit project attributes	Project
Edit project structure	Project, Activity
Approval and Change management steps	Project, Activity

Employee and *Contract* custom fields are not assigned to workflow steps; they are shown on the employee and contract administration pages and are always editable and never required. The assignment belongs to the step definition: steps that are shared between workflows (for example the same *Approval* step used by several workflows) share their custom field assignment.



Header

"Custom fields assignment - <workflow step name> (<object type>)".

Assignment list (left)

- Toolbar:
  - **Back arrow** (green) – returns to the Workflows screen.
  - **Plus** – opens the popup **Add new custom field**. Only active custom fields of this object type that are not yet assigned to the step are offered. If there are none, the message "All of custom fields have already been added." appears. The plus does nothing while there are unsaved changes.
  - **Reorder** – changes the order in which the fields appear on the step (same popup and messages as on the Roles screen).
- Columns: **Position**, **Editable**, **Required**, **Internal name**, **Type**; red trash icon per row; search field, filter row, paging.

- Delete: confirm "Do you really want to delete "<internal name>"?". Removing an assignment does not delete the custom field itself, nor the values already stored on projects.
- Reordering is only possible when there are no unsaved changes.

Add new custom field popup

- A grid with **Internal name** and **Type**, a search field and single selection.
- Select one field and click **OK**; the field is added at the end of the list and opened in the detail panel. Clicking **OK** without a selection shows "There are missing or wrong values in this form." **Cancel** closes the popup.

Assignment details (right)

- **Editable** – checkbox; when ticked, users can change the field's value on this step. When unticked, the field is read-only and "Required" is cleared automatically.
- **Required** – checkbox; available only when "Editable" is ticked. The step cannot be completed without a value. A required custom field of the type Check box must be ticked; a required Traffic light field counts as filled when "None" is selected. For a text block, "Editable" and "Required" have no effect.
- **Type** – read-only.

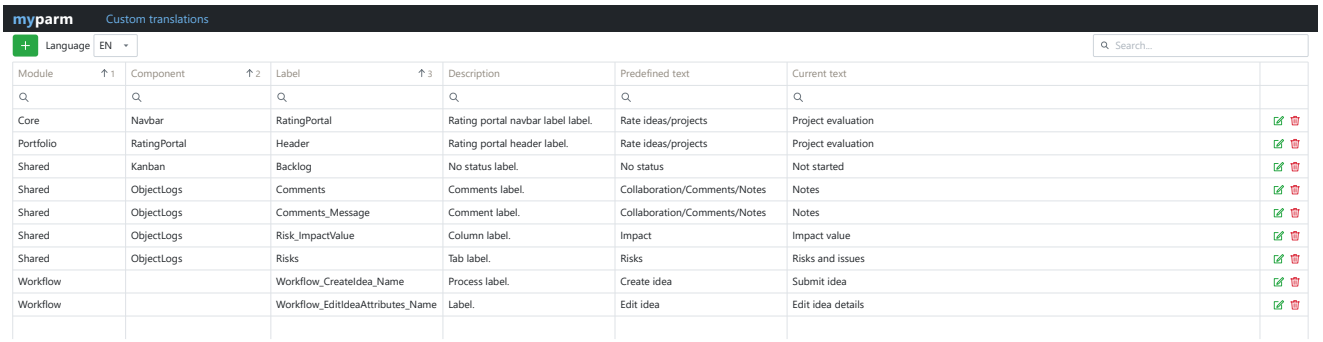
Click **Save** to store the assignment. Leaving with unsaved changes shows the unsaved-data warning.

Custom fields in workflow variants

A workflow variant has no *Editable* / *Required* / *Position* settings of its own; it acts as a filter on top of the step assignment. For a project with a variant, a step shows only the fields that are assigned to the step and contained in the variant. A field must therefore be both assigned to the step and added to the variant to appear for that variant. If a field must be required for one variant and optional for another, create two fields and put each into its own variant. Default values are applied when the object is created, and only to the fields that are visible on the current step and, for a project with a variant, contained in the variant; when an existing object is edited, the stored values are shown.

10.7 Custom translations

On the "Custom translations" screen you replace texts of the user interface (labels, captions, messages) with your own wording, separately per language. A custom translation applies to the whole application and to all users who work in that language. The original text stays available and can be restored by deleting the custom translation. The screen is available to users with the access right "Can maintain translations".



Grid

- Toolbar: green **plus** button (tooltip "Add") and the **Language** drop-down with the language codes of all active languages. Your application language is preselected. Changing the language reloads the list.
- Columns: **Module**, **Component**, **Label** (the technical position of the text), **Description** (what the text is used for), **Predefined text** (the standard text delivered with the application), **Current text** (your replacement). A fixed column on the right contains a green **pencil** (edit) and a red **trash** (delete) icon.
- Search field, filter row, paging. Double-clicking a row opens it for editing.
- The list shows only texts that already have a custom translation in the selected language.

Adding a custom translation

1. Select the **Language**.
2. Click the **plus**. The popup opens.
3. Type a part of the text you want to replace into **Search by translation** and leave the field. The matching standard texts are loaded into the **Predefined text** drop-down.
4. Select the entry in **Predefined text** (required). **Description**, **Module**, **Component** and **Label** are filled in automatically and are read-only; use them to make sure you picked the right text.
5. Enter your wording in **Current text** (required, max. 4000 characters).
6. Click **OK**. (**Cancel** discards the entry.) Missing values produce "There are missing or wrong values in this form."

Editing a custom translation

Click the pencil icon or double-click the row. The same popup opens without the search field; **Predefined text** is read-only. Change **Current text** and click **OK**. If nothing was changed, the popup simply closes.

Deleting a custom translation

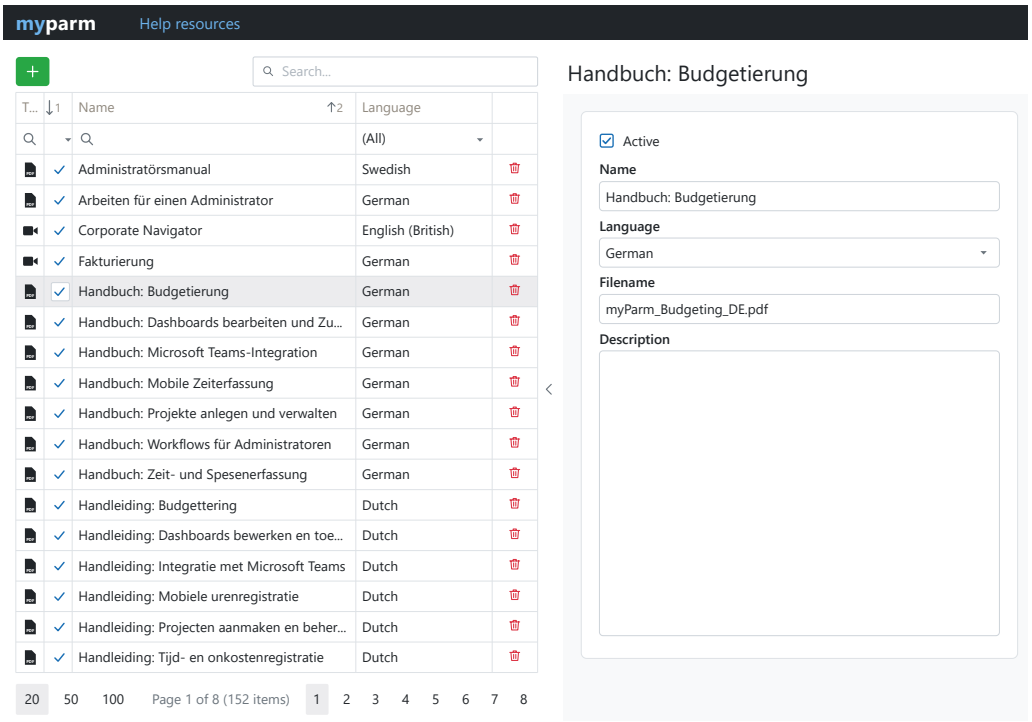
Click the trash icon and confirm "Do you really want to delete this item?". The notification "Translation has been deleted." appears and the predefined text is used again.

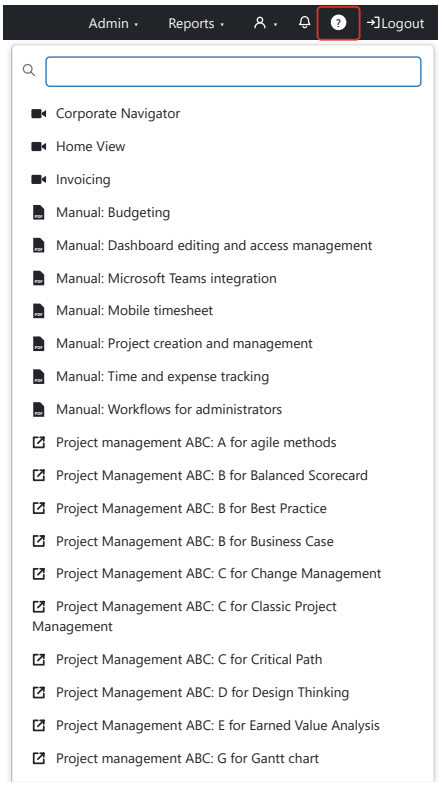
When do changes take effect?

Changed texts are updated in your own session immediately where possible. When you leave the screen after changes, the note "Changes in translations will be visible after reload." reminds you that other users (and some parts of the screen) see the new wording only after the application is reloaded.

10.8 Help resources

"Help resources" manages the entries of the help menu – the question-mark icon in the top bar of the application. Each entry is a link, a PDF document or a training video in a specific language. Users see only the entries of their own language. The screen is available to users with the access right "Admin".





Help resource list (left)

- **Plus** button – adds a new entry (grey and inactive while there are unsaved changes). New entries are always of the type "Hyperlink".
- Columns: **Type** (icon: external-link symbol = Hyperlink, document symbol = Pdf, camera symbol = Video; the tooltip names the type), **Active**, **Name**, **Language**; red trash icon per row. Active entries are listed first, then alphabetically by name.
- Search field, filter row, paging.
- Delete: confirm "Do you really want to delete "<name>"?". The help menu is refreshed immediately.

Help resource details (right)

- **Active** – checkbox; only active entries appear in the help menu.
- **Name** – required, max. 512 characters; the text shown in the help menu. Within one language and type the same name may not point to the same target twice.
- **Language** – required; drop-down of languages with a search field.
- **URL** – shown for entries of the type Hyperlink: required, max. 256 characters, must be a valid web address. It is opened in a new browser tab.
- **Filename** – shown instead of URL for entries of the type Pdf or Video: the file name of the document or video stored on the server. PDF and video entries cannot be created on this screen (new entries are always hyperlinks); they are provided by Parm.
- **Description** – optional multi-line text.

Click **Save** to store the entry; the help menu is refreshed immediately. Leaving with unsaved changes shows the unsaved-data warning.

How users see help resources

- The question-mark icon (marked with a red frame in the help menu figure) appears in the top bar only when at least one active help resource exists for the user's language.
- Clicking it opens a small panel with a search box and the list of entries (sorted by name, each with its type icon).
- A hyperlink or PDF opens in a new browser tab; a video opens in a player popup inside the application.

10.9 Appendix: Access rights

The table lists the access rights that can be assigned to a role, with the English name and description shown in the access right list of the Roles screen. The security level of each right is displayed on screen in the line "Security level: ...". The rights marked in the column **Defines level** determine the security level of a role: "Admin" and "Maintain roles" give the level Administrator, "Human Resources portal" and "Can access simple user management" give the level HR Manager.

Access right	Description	Defines level
Admin	Gives access to Admin module in order to maintain all system relevant master data such as: Period management, Calendar, Currencies and exchange rates, VATs, Employee categories, Cost accounts etc.	Yes
All contracts	Independent of team assignment, the user can see and edit all the contracts.	
All portfolios	Independent of team assignment, the user will see all existing portfolios.	
All projects	Independent of team assignment during project creation, the user will see all existing projects within Project and Budget Portal. Furthermore this user will be able to start and continue all project processes.	
Budget portal	Gives access to the budget portal.	
Can access BSC	Gives general non-admin access to BSC module.	
Can access dashboard	Gives access to see dashboards	
Can access MIS	Gives general non-admin access to MIS, access to particular MIS modules is determined by licenses.	
Can access simple user management	Gives access to simple user management needed for standalone MIS operation without other modules. In all other cases HR module should be used instead.	Yes

Access right	Description	Defines level
Can administrate BSC	Gives access to BSC administration: Strategy set and BSC structure maintenance, BSC period management.	
Can administrate MIS	Gives access to maintain object structures and score maps.	
Can administrate portfolios	Gives access to maintain portfolios.	
Can administrate score maps	Gives access to score map administration.	
Can create RM snapshots	Allows the user to create historical snapshot versions of resource plans in the project portal.	
Can generate finvoice	Gives access to use Finvoice exporting.	
Can import financial data	Gives access to expenditures and payments import.	
Can import to MIS	Allows to import data to MIS structures.	
Can lead portfolios	Allows to maintain own portfolios and sub portfolios.	
Can maintain bank details	Gives access to maintain bank details.	
Can maintain custom reports	Gives access to use custom reports and report designer.	
Can maintain dashboard	Gives access to maintain dashboards	
Can maintain GRI reporting structure	Gives access to maintain the GRI reporting structure in BSC module (sustainability).	
Can maintain licence	Gives access to license management.	
Can maintain MIS objects	Gives access to see, add and maintain MIS objects. User which own this access right are also listed to be assigned in team management of MIS objects. Only if assigned the object can be seen.	
Can maintain MIS resource management	Gives access to MIS object resource management.	
Can maintain MIS resource management actuals	Gives access to MIS object resource management actuals.	

Access right	Description	Defines level
Can maintain payment conditions	Gives access to maintain payment conditions.	
Can maintain payments	Gives access to maintain payments via payments portal.	
Can maintain PLA status	Gives access to the PLA status change view (requires 'Project portal' access right).	
Can maintain profit & loss	Gives access to maintain profit and loss via profit & loss portal.	
Can maintain project containers	Gives access to maintain project containers in the project portal.	
Can maintain resource management	Gives access to resource management.	
Can maintain sender addresses	Gives access to maintain sender addresses of the company which uses myPARM. These sender addresses can be used to be printed on invoices and within reports.	
Can maintain task templates	Gives access to maintain task templates.	
Can maintain translations	Gives access to maintain translations.	
Can manage organisation unit	Allows to edit organisation unit structure.	
Can Monitor Organisation Unit	Allows to view the organisation unit’s data in dashboards and reports.	
Can perform ad-hoc invoicing	Enables ad-hoc invoicing process in invoice portal.	
Can perform mass reporting	Gives access to Mass Reporting.	
Can perform simple budgeting	Gives access to Simple Budget.	
Can see all invoices	Gives access to see all invoices within invoice portal.	
Can see all MIS objects	Gives general access to see all MIS objects independent of team management assignment.	
Can see and perform all in TET OL Approval	Gives access to see and perform everything in TET OL approval view.	
Can see and perform all in TET	Gives access to see and perform everything in TET PL approval view.	

Access right	Description	Defines level
PL Approval		
Can see MIS objects	Gives access to see MIS objects. User which own this access right are also listed to be assigned in team management of MIS objects. Only if assigned the object can be seen.	
Can see Project control view	Gives access to see the project control view.	
Can update login	Can update login	
Can use uniFLOW interface	Gives access to uniflow import and export.	
Contract manager	Gives access to contract management.	
Customers & Suppliers portal	Gives access to C&S Portal - C&S management to maintain customer and supplier basic data.	
Duties	Gives access to the personal Duty Management view.	
Human Resources portal	Gives access to the HR Module and its functionalities.	Yes
Invoice portal	Gives access to the invoice portal.	
Maintain application settings	Gives access to maintain admin settings.	
Maintain roles	Gives access to role management and allow maintaining of roles and access rights.	Yes
Messenger	Gives access to the internal myPARM Messenger.	
Organisation portal	Enables access to the Organisation Module to set up organisational relevant settings like Organisational Approver of Time and Cost entries, defining number circles for invoices and expenditures, defining structure of the organisation etc.	
Project portal	Gives access to the Project Portal. User can: create new projects, change or continue own projects.	
Resource management portal	Gives access to the resource management portal.	
Standard selling rates	Gives access to maintain standard selling rates tables.	
TET admin	Gives access to see all projects in TET in order to enter TET entries. Is allowed to enter and edit all available TET entries of all employees.	
TET approval OL	Gives general access to the TET OL Approval view and makes this user available in ORG structure maintenance	

Access right	Description	Defines level
	when defining which employee is responsible TET OL approver of the company/business unit/department. Depending on which organisational unit the employee is assigned to, the respective entries are shown for approval.	
TET approval PL	Gives general access to the TET PL Approval view and makes the user available during project creation when defining which employee is responsible TET PL approver of a project. Projects are only shown in TET PL approval when user is assigned in Team Management of the project.	
TET manager	This role is assigned on organisational level. A TET manager may enter and edit on behalf TET entries of the employees that belongs to the same organisational unit.	
TET portal	Gives general access to the TET Portal.	
Workflow management	Gives access to see and edit all myPARM processes listed in workflow management.	

10.10 Appendix: Settings available to administrators

The table lists the settings that a customer administrator sees on the Settings screen. The first part of the setting name is the card title on the Settings screen; the table is sorted the same way as the screen. The default is the value set when the setting is created; it may have been changed on your installation. A dash means that the setting is empty by default.

Setting	Default	Description
Bsc.HistoricalPeriods.LongTrend	4	Number of past periods used for long trend calculation (without current period).
Bsc.HistoricalPeriods.Sparkline	11	Number of past periods shown in history chart on the BSC cockpit (without current period).
Budget.Advanced. DefaultCostElement	EmployeeCategories	Default Cost elements in advanced budget creation.
Budget.Advanced. UseMaterialCostAccountsDefault	false	Switches on/off the Material cost accounts attribute in advanced budget creation.
Chat.Duty. DeadlineOrangePeriodInDays	0	Duty go to orange state when the deadline of duties in this number of days.
Chat.Duty. DeadlineRedPeriodInDays	1	Duty go to red state when the deadline of duties in this number

Setting	Default	Description
		of days.
Chat.Duty.IsTrafficLightActive	true	Switches on/off the duty traffic light.
Chat.Duty. OrangeStatePeriodInDays	0	Duty go to orange state when unread messages are older than this number of days.
Chat.Duty.RedStatePeriodInDays	1	Duty go to red state when unread messages are older than this number of days.
Chat.Messenger. IsTrafficLightActive	true	Switches on/off the messenger traffic light.
Chat.Messenger. OrangeStatePeriodInDays	0	Messenger go to orange state when unread messages are older than this number of days.
Chat.Messenger. RedStatePeriodInDays	1	Messenger go to red state when unread messages are older than this number of days.
General.DateFormat	dd.MM.yy	The date format used for chosen imports/exports/reports
General.DateSeparator	.	The date separator used for chosen imports/exports/reports
General.DecimalSeparator	.	The decimal separator used for chosen imports/exports/reports
General.Dialect	–	The dialect name.
General.DisplayPrecision	2	Number of decimal digits displayed in application.
General.GroupSeparator	,	The group separator used for chosen imports/exports/reports
General.LanguageCode	English	The language code.
General.Logs. MarkSendNotificationsByDefault	False	If set to true, then while creating new log actions or collaboration entries the send notifications checkbox will be marked automatically.
General.Planning.Selling.Rate	–	Planning selling rate in system currency for resource management.
General.Workflow.MaxIdleMinutes	0	Maximum time in minutes after which an idle workflow process will be automatically unblocked. 0 disables this feature.

Setting	Default	Description
Invoicing.CreationDueColumn.ShowColumn	true	Switches on/off the "Due" column on Invoice Portal.
Invoicing.CreationDueColumn.TrafficLightOrangeStatePeriodInDays	7	Due traffic light turns orange when the to be created date is to be reached within this number of days.
Invoicing.CreationDueColumn.TrafficLightRedStatePeriodInDays	0	Due traffic light turns red when the to be created date is to be reached within this number of days.
Mobile.Tet.ActivityFormat	{ProjectName}/{ActivityName}	By this setting you can define how the activity will be shown in the mobile timesheet. Use the following possibilities: Project - {ProjectName}, {ProjectShort}, {ProjectNumber}; PLA - {PLAName}, {PLAShort}, {PLANumber}; Activity - {ActivityName}, {ActivityShort}, {ActivityNumber}.
PasswordPolicy.AreDigitsRequired	False	Enable the option to make digits required in the password, depending on the minimum number of policies.
PasswordPolicy.AreLowercaseLettersRequired	False	Enable the option to make lowercase letters required in the password, depending on the minimum number of policies.
PasswordPolicy.AreSpecialCharactersRequired	False	Enable the option to make special characters required in the password, depending on the minimum number of policies.
PasswordPolicy.AreUppercaseLettersRequired	False	Enable the option to make uppercase letters required in the password, depending on the minimum number of policies.
PasswordPolicy.IsPersonalInformationForbidden	False	Enable to disallow the use of employees personal information like login, name or last name within the password.
PasswordPolicy.MinimumLength	1	Minimum password length.
PasswordPolicy.MinimumRequiredPolicies	–	This determines the number of required policies that the password must satisfy. This

Setting	Default	Description
		number should be between 1 and the total number of enabled policies (not including the personal information policy). For example, if policies for lowercase characters, digits, and special characters have been enabled, and the minimum number of required policies is two, then the password must satisfy any two policies of these three types. For instance, digits and special characters. When empty all enabled required policies must be satisfied.
Payments.Import.SourcePath	–	The source directory for the payment file import.
Project.Gantt.ZoomLevel	months	Default Gantt zoom level.
Project.InErpImport. NextProjectNumbers	1	Contains a map of project container short names to next project numbers. For example "11000:1,12500:120".
Project.InErpImport. ProjectToContainerShorts	–	Contains a map of project short name prefixes to container short names. For example: '40:AT,50:VSH' means if a project short name starts with 40 it goes to container with short AT, if 50 then to VSH.
Project.InErpImport. SprTypeToProjectType	A:Abwesenheit, P:Kundenprojekt,A Akquisition:Akquisition,E Entwicklung:Entwicklung,W Weiterbildung: Weiterbildung, V Administration: Administration	Contains a map of suproject type names to MyParm project type names.
Project. IsDefaultOrganisationUnitTetRestrictionSet	false	If set to true, during creation of new projects selected organisation unit is automatically marked in TET restrictions.

Setting	Default	Description
Project. UsePLAsOnlyOnActivityLevel	false	If set to true the buttons for adding summary PLA and leaf without PLA are not available in the edit project structure and edit template views.
Reports.ProjectStatus. ReportHelpUrl	–	Sets a link to file explanining the Project status report fields.
Reports.ShowBillableEntriesDefault	True	Default value of show billable entries parameter.
Reports. ShowNonBillableEntriesDefault	False	Default value of show non billable entries parameter.
Reports.TimeRecording. IsTotalColumnBeforeDateColumns	–	Sets whether the Total column should be on the left side of the report. If set to false, Total is the last column in the report.
ResourceManagement. LimitEmployeesToMandant	False	If set to true, only users in the same mandant as the loggedin employee can be added to the resource plan.
SAP.Import.Obligo. CostAccountShort	–	The cost account short for SAP to myPARM import.
SAP.Import.SourcePath	–	The directory of the files with actuals from SAP to import to myParm
Synchronizer.Employee. DefaultOrganisationUnitShort	–	Default organisation unit short name to be used when importing employees using the Synchronizer. This is a fallback if the department name cannot be matched to an OU short name.
Timesheet. AllowedMinutesPrecision	Minute	The allowed minutes precision of timesheet entry value.
Timesheet.RecentlyUsed. OmitExistingActivities	–	Omits adding already existing Activities while recently used, if set to true.
Timesheet. SortAddedActivitiesOnGrid	false	If set to true activities added to the timesheet grid are automatically sorted.
uniFLOW.Export.OutputPath	–	The directory of the file with leaf activities exported for uniFLOW

Setting	Default	Description
uniFLOW.Import.SourcePath	–	The directory of the files with expenditures from uniFLOW to import to myParm

11. Configuration: workflows, reports, automation and user menu

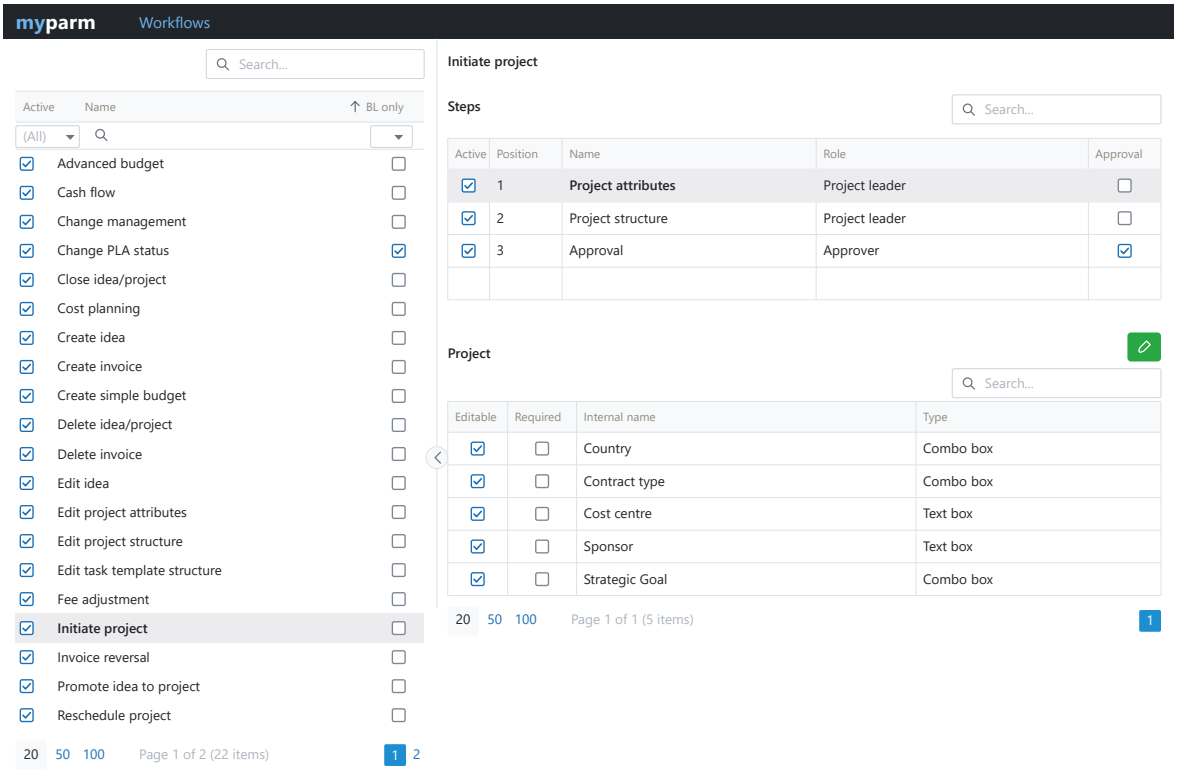
11.1 Workflows

Menu: Admin > Configuration > Workflows. **Who can see it:** users with the access right "Workflow management" and the Admin licence. Users without the right do not see the menu item; opening the address directly shows an "access denied" page.

The page shows all myPARM processes (workflows) and their steps. Workflows are delivered with myPARM. Creating or deleting workflows, adding, removing or reordering steps and defining approval rules are not possible in the user interface; this is done by Parm during the initial set-up of the system. On this page you can:

- for project workflows, allow the selection of a workflow variant,
- see which custom fields are shown in a step and jump to the page where they are assigned.

More details on processes – the list of all processes, their steps and the diagrams of the process lifecycle – are given in the manual "Processes, Workflow Variants and Custom Fields" (in the help menu: "Manual: Workflows for administrators").



Left side: workflow list

- The list can be hidden or shown with the arrow button on its right edge.
- A search box above the grid and a filter row under the column headers filter the list.
- Columns:
  - **Active** – whether the workflow is in use. Active workflows are listed first.
  - **Name** – name of the process.
  - **BL only** – *Business Logic only*: the process is never listed in the users' *Start process* menus; myPARM starts it internally when an action requires an approval. In the standard installation the only BL-only process is **Change PLA status**.
- Click a row to select the workflow. The details open on the right.
- A pager at the bottom lets you change the page size.

Right side: workflow details

The name of the selected workflow is shown as a heading.

Attributes box (above the *Steps* grid)

- **Active** (checkbox, read-only) – shows whether the workflow is active.
- **Allow selection of variants** (checkbox) – shown only for project workflows. Switch it on if users should be able to choose a workflow variant when starting this process (see Workflow variants). By default it is switched on for *Create idea*, *Promote idea to project* and *Initiate project*, and switched off for every other workflow.

Steps box – a grid with one row per step of the workflow. All columns are read-only:

- **Active** – whether the step is active in this workflow. Inactive steps are skipped when the process runs.
- **Position** – the order of the step in the process.
- **Name** – name of the step (translated).
- **Role** – the role whose members perform this step. When empty, any user who may start the process can perform the step. The roles of the steps are set by Parm.
- **Approval** – the step is an approval step: the responsible person sees *Save and approve* and *Decline* instead of *Next*.
- A search box above the grid filters the steps.
- Select a step (click its row) to see the custom fields of the step in the boxes on the right.

Custom field boxes – after a step is selected, one box appears for every object type the step supports (*Project*, *Activity*). *Employee* and *Contract* custom fields are not assigned to workflow steps. Each box contains:

- A green pencil button in the header. Click it to open the page "Custom fields assignment" for this workflow, step and object type. There you add or remove custom fields and set

them Editable / Required (see Custom fields assignment).

- A read-only grid of the custom fields already assigned to the step:
  - **Editable** – the field can be edited in this step.
  - **Required** – the field must be filled in this step.
  - **Internal name** – the internal name of the custom field.
  - **Type** – the editor type of the field (Text box, Check box, Date picker, ...).
  - A search box filters the grid.

Save button

- The **Save** button at the bottom right is disabled while no workflow is selected. It turns green as soon as there are valid unsaved changes; unsaved changes are also indicated on the page header.
- Click **Save** to store the changed attributes. The list is refreshed and the workflow stays selected.
- If another user changed the same workflow in the meantime, the message "A data conflict occurred due to parallel entries. Your data has been reset." appears and the workflow is reloaded.
- If you leave the page or select another workflow with unsaved changes, the question "Are you sure you want to leave without saving? All of your changes will be lost." appears. Choose **Yes** to discard the changes or **No** to stay.

How the configuration is used when a process runs

- **Who can start a process.** The user must hold the role of the first active step of the workflow. If that step has no role, anyone can start the process. In addition the process preconditions must be met: for project processes the user must normally be a member of the project team, the project must be open, and no similar process may already be running on the object. Invoice processes can also be started by users with the access right "Can see all invoices".
- **Who continues a process.** After a step is completed, the process moves to the next active step. If the current user does not hold the role of the next step, the process is suspended and appears in the process list of the users who hold that role. If the next step has no role, the same user continues.
- **Approval steps.** The approver can *Save and approve* (the process continues) or *Decline* with one of three reasons: *Correction needed* sends the process back to an earlier step, *Reject* aborts the process and *Put on hold* suspends it.
- **Stop.** A step can be configured during the initial set-up so that the executor may stop the whole process (*Stop* button).
- **Variants.** If a variant with roles is involved, the user must additionally hold one of the variant's roles (see Workflow variants).

When a step role is changed, running instances continue with the new role from their next step; instances currently suspended on that step become visible to the members of the new role.

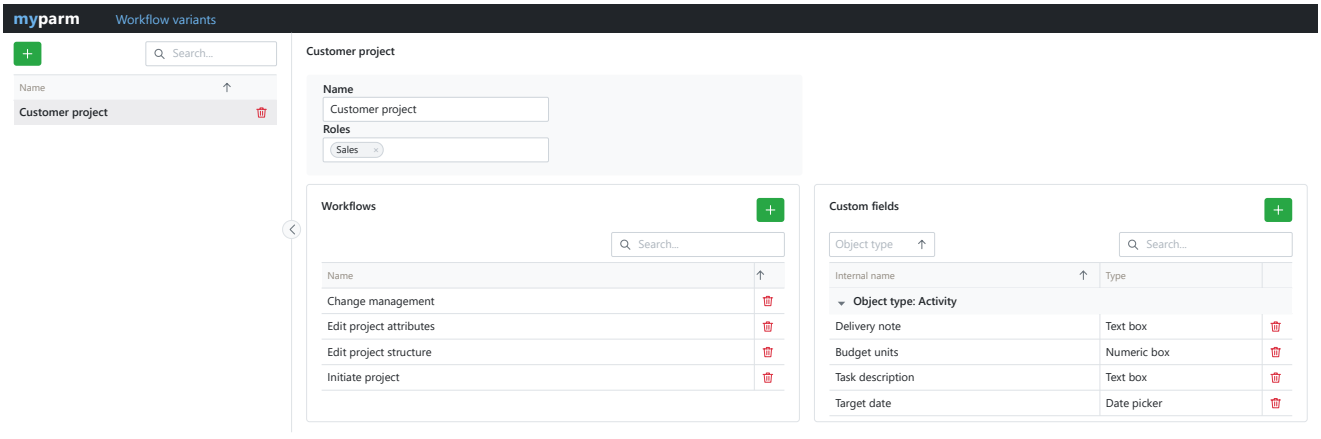
11.2 Workflow variants

Menu: Admin > Configuration > Workflow variants. **Who can see it:** users with the access right "Workflow management" and the Admin licence.

A workflow variant is a named configuration that can be attached to project workflows. It defines the workflows the variant applies to, the custom fields (project and activity fields) shown when a process runs under the variant and, optionally, the roles allowed to use it. Variants let one installation handle several kinds of projects differently – for example a *Customer project* with customer-related fields and an *Internal project* with a cost centre only – while reusing the same processes. A variant does not change the steps of a workflow, the step roles or the approval rules; it only filters the custom fields shown and restricts the users who may use it.

More details – how variants and custom fields work together, the variant selection diagram and a worked example – are given in the manual "Processes, Workflow Variants and Custom Fields" (in the help menu: "Manual: Workflows for administrators").

Variants can be attached to the following project workflows only: *Create idea*, *Edit idea*, *Promote idea to project*, *Initiate project*, *Edit project attributes*, *Edit project structure* and *Change management*.



Left side: variant list

- Green **plus** button above the grid: creates a new, empty variant and selects it. The button is grey (and does nothing) while there are unsaved changes – save first. The toast "Please save your changes before adding a new element." may be shown.
- Search box above the grid.
- Column **Name** – sorted alphabetically.

- Red **trash** icon at the end of each row: deletes the variant after the question "Do you really want to delete "<name>"?". A variant that is used by a running or suspended process cannot be deleted ("Cannot delete the variant, it is being used currently."); finish or abort those processes first.
- The list can be hidden/shown with the arrow button on its edge.

Right side: variant details

Attributes

- **Name** (required, max. 100 characters) – must be unique. If the name already exists the hint "The entered value already exists, but it has to be unique." is shown and saving is blocked.
- **Roles** – optional multi-select list of roles. If roles are given, the user must hold at least one of them to start, continue or stop any process running under this variant. If the list is empty, all users may use the variant. Open the list, tick the roles and confirm with **OK**; use the search box inside the list to find a role.

Workflows box

- Header with a green **plus** button. Click it to open the dialog **Add workflows**:
  - The dialog lists the workflows that support variants (the seven project workflows listed at the start of this section) and are not yet part of the variant, with a search box.
  - Tick one or more workflows (or use the header checkbox to select all) and click **OK**. **Cancel** closes the dialog without changes.
  - If every available workflow is already added, the dialog does not open; instead the message "All workflows have already been added." appears briefly.
- A red error icon next to the header (tooltip "At least one workflow must be added.") is shown while the variant has no workflow. The variant cannot be saved in this state.
- An orange warning triangle next to the header (tooltip "Add at least one workflow that allows variant selection to be able to use the variant.") is shown when none of the added workflows has **Allow selection of variants** switched on. Saving is possible, but the variant cannot be chosen by users until such a workflow is added.
- Grid columns: **Name** of the workflow; red **trash** icon to remove the workflow from the variant after the question "Do you really want to delete this item?".
- A workflow that is currently used by a running instance of this variant cannot be removed; saving is refused with "Cannot remove workflow definition from variant that is being used."

Custom fields box

- Header with a green **plus** button. Click it to open the dialog **Add custom fields**:

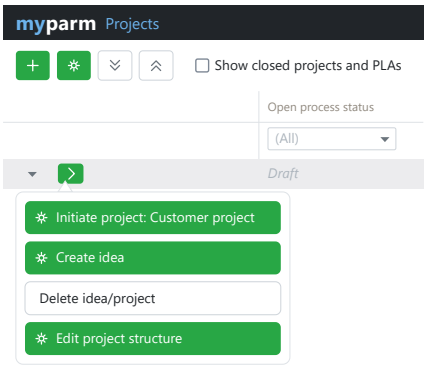
    - The dialog lists all active *Project* and *Activity* custom fields that are not yet part of the variant, grouped by **Object type**, with the columns **Object type**, **Internal name** and **Type**, and a search box. A field must also be assigned to the workflow step where it should appear (see Custom fields assignment).
    - Tick the fields and click **OK**, or **Cancel**.
    - If every custom field is already added, the message "All custom fields have already been added." appears instead.
- Grid grouped by **Object type** with the columns **Internal name**, **Type** and a red **trash** icon to remove the field (confirmation "Do you really want to delete this item?"). The grouping panel above the grid and a search box are available.

Save button

- **Save** at the bottom right: disabled while nothing is selected; green when the variant is valid and has unsaved changes.
- Leaving the page or selecting another variant with unsaved changes asks "Are you sure you want to leave without saving? All of your changes will be lost."
- Concurrent changes by another user show "A data conflict occurred due to parallel entries. Your data has been reset." and the variant is reloaded.

How a variant is chosen and what it changes

- **Choice.** When an idea or project has no variant yet and the user starts a workflow that is included in a variant and has *Allow selection of variants* switched on, the user is asked to pick a variant. In the portfolio the *Create project* (and *Create idea*) button opens a menu with one entry per variant the user may use. For a project without a variant, the process button lists one entry per variant in the form *Workflow name: Variant name*. A variant the user may not use is left out of the menu; it is never shown disabled.
- **Storing.** The chosen variant is stored permanently on the project and cannot be changed afterwards in the user interface. Every later process of that project that is part of the variant runs under the stored variant; a workflow that is not part of the variant runs in standard mode.
- **Import.** When projects are imported from a file, the column *WorkflowVariantName* sets the variant of the imported project. An unknown name is reported as "Workflow variant not found."
- **While a process runs.** Only the custom fields that are assigned to the step and belong to the variant are shown, and only these are checked as required. Users without one of the variant's roles cannot start or continue the process. The variant name is shown in the process header and in the process buttons.



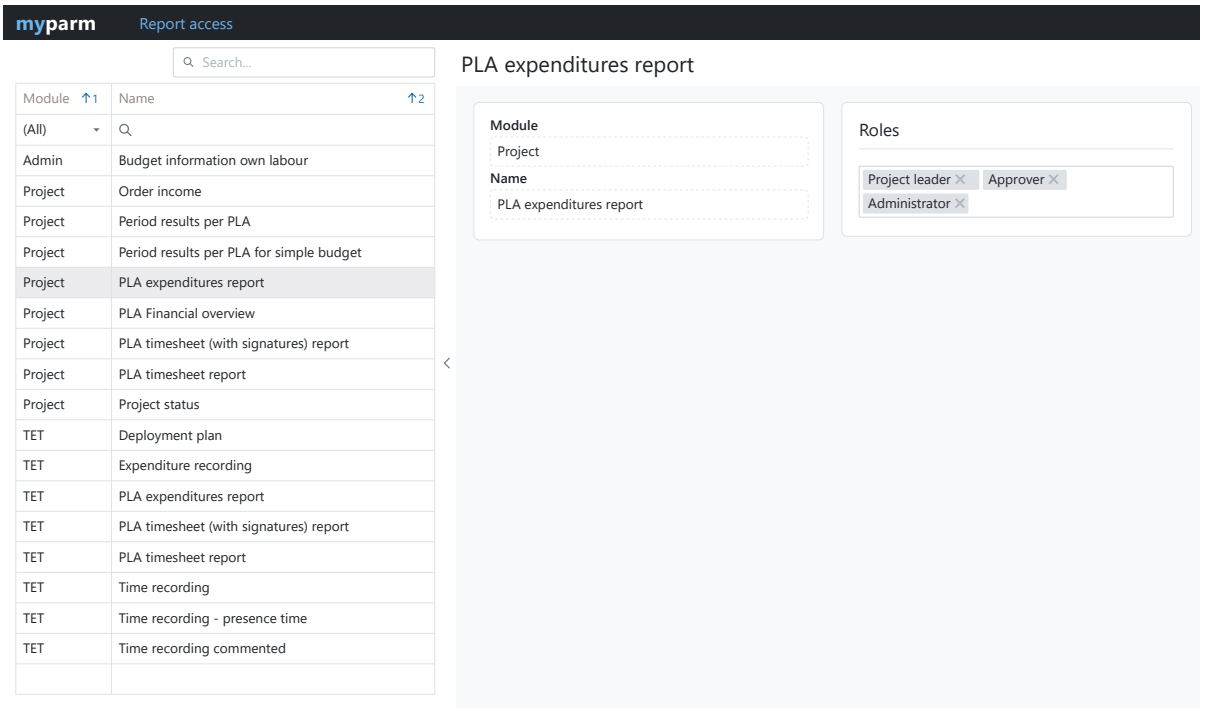
Procedure: create a workflow variant

1. Open Admin > Configuration > Workflow variants.
2. Click the green **plus** above the list.
3. Enter a unique **Name** and, if needed, select the **Roles** that may use the variant.
4. In the **Workflows** box click the green plus, tick at least one workflow – including one with "Allow selection of variants" – and click **OK**.
5. In the **Custom fields** box click the green plus, tick the custom fields and click **OK**.
6. Click **Save**.

11.3 Report access

Menu: Admin > Configuration > Report access. **Who can see it:** users with the access right "Admin" and the Admin licence. The page and its menu item are hidden in the SaaS Standard version.

Here you define which roles may open each standard report of myPARM. (Access to custom reports is defined on the Custom reports page.) Reports cannot be added or deleted here; the list is fixed.



Left side: report list

- Search box and a filter row.
- Columns:
  - **Module** – the module the report belongs to (TET, Project, Invoicing, MIS, Organisation, Admin). The list is sorted by module.
  - **Name** – the name of the report as shown in the Reports menu.
- Click a row to select the report. There is no plus button and no delete icon.

Right side: report detail

- **Module** (read-only).
- **Name** (read-only).
- **Roles** – multi-select list of roles. Tick the roles whose members may open the report and confirm with **OK**. The list has a search box.

Save button

- **Save** at the bottom right (disabled until a report is selected; green with unsaved changes).
- After saving, the whole application is reloaded so that the Reports menu reflects the new permissions.
- Leaving with unsaved changes asks "Are you sure you want to leave without saving? All of your changes will be lost."

Procedure: grant a role access to a standard report

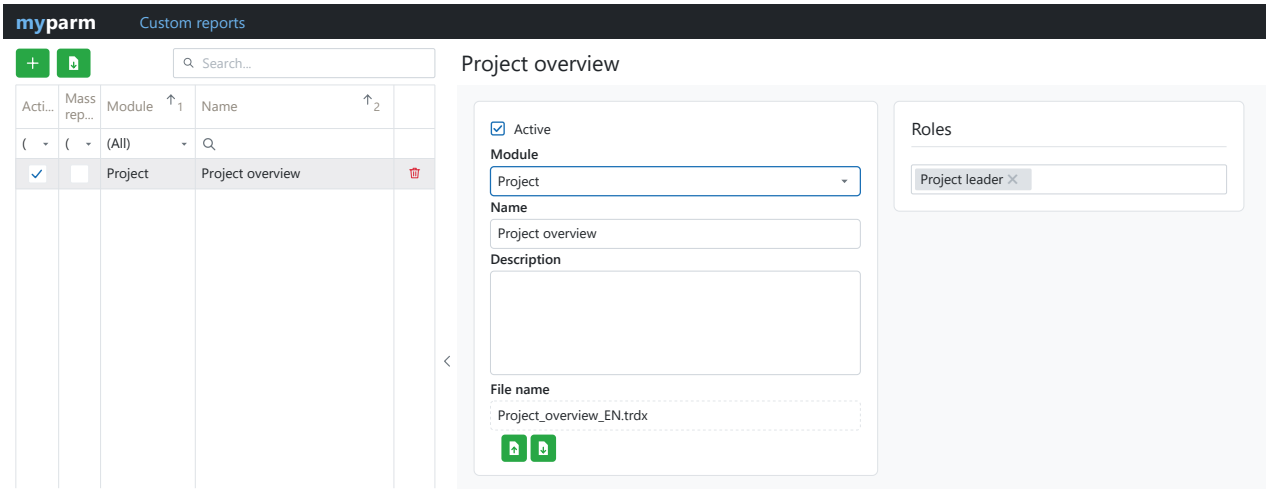
1. Open Admin > Configuration > Report access.

2. Select the report in the list (use the filter row to narrow it down by module).
3. Open the **Roles** list, tick the roles and click **OK**.
4. Click **Save**. The application reloads.

11.4 Custom reports

Menu: Admin > Configuration > Custom reports. **Who can see it:** users with the access right "Can maintain custom reports" and the Admin licence.

Custom reports are report templates created with the report designer (template files with the extension .trdx). On this page you upload the templates, assign them to a module and decide which roles may run them. The reports then appear in the **Reports** menu of myPARM.



Left side: report list

- Toolbar:
  - Green **plus** button – creates a new custom report and selects it. The button is grey while there are unsaved changes.
  - Green **file download** icon button (hint "Download report designer") – downloads the report designer as a ZIP file (ReportDesigner.zip). Unpack and install it on your computer to design or edit templates.
- Search box and filter row.
- Columns:
  - **Active** – only active reports appear in the Reports menu.
  - **Mass reporting** – the report is configured for mass reporting (read-only information).
  - **Module** – the module in whose Reports sub-menu the report is listed. The list is sorted by module, then by name.
  - **Name**.

- Red **trash** icon – deletes the report after the question "Do you really want to delete "<name>"?". After the deletion the application reloads.

Right side: report detail

- **Active** (checkbox) – untick to hide the report from all users without deleting it.
- **Module** (drop-down, required) – TET, Project, Invoicing, MIS, Organisation or Admin. Determines the Reports sub-menu in which the report is shown.
- **Name** (required, max. 50 characters) – shown in the Reports menu. Must be unique among custom reports ("The entered value already exists, but it has to be unique.").
- **Description** (optional, max. 1000 characters).
- **File name** (read-only, required) – the name of the uploaded template file. Filled automatically after an upload.
- Green **file upload** icon button (hint "Upload custom report template file") – opens the dialog "Upload custom report template file":
  - Drag the file into the dashed area ("Drag and drop file here") or click **Browse** and select it. Only one file with the extension .trdx is accepted.
  - **Clear** removes the chosen file, **Upload** uploads it, **Cancel** closes the dialog.
  - After a successful upload the file name is written into **File name** and the report is marked as changed – remember to click **Save**.
- Green **file download** icon button (hint "Download custom report template file") – shown only when a file name exists. Downloads the stored template file. The button is grey and does nothing while the report has unsaved changes – save first. If the file no longer exists on the server, the message "Template file is missing. Please contact your administrator." appears.
- Info line "This report is configured for mass reporting." – shown only for mass reporting reports.
- **Roles** box – multi-select list of roles whose members may run the report. Tick the roles and confirm with **OK**.

Save button

- **Save** at the bottom right (disabled until a report is selected; green with valid unsaved changes). Missing required values are marked in red under the fields.
- After saving, the whole application reloads so that the Reports menu shows the new or changed report.
- Leaving with unsaved changes asks "Are you sure you want to leave without saving? All of your changes will be lost."

Procedure: add a custom report

1. Open Admin > Configuration > Custom reports.
2. Click the green **plus** above the list.

3. Select the **Module** and enter the **Name** (and optionally a **Description**).
4. Click the green **upload** icon, drag the .trdx file into the dialog or click **Browse**, then click **Upload**.
5. In the **Roles** box tick the roles that may run the report and click **OK**.
6. Make sure **Active** is ticked and click **Save**. The application reloads.

Where users find custom reports

- Open the **Reports** menu in the navigation bar. It contains one sub-menu per module (TET, Project, Invoicing, MIS, Admin, Organisation ...).
- Each sub-menu lists the standard reports first, followed by the header **Custom reports** and the active custom reports of that module, shown with their Name.
- Clicking a custom report opens it in the report viewer. Users only see reports for which one of their roles is selected on the Custom reports page.

Report designer

- Click the green icon button with the hint "Download report designer" on the Custom reports page to download the standalone report designer (ZIP).
- Design or edit the template on your computer, save it as a .trdx file and upload it as described in Procedure: add a custom report.
- For working with the designer itself refer to the Telerik standalone report designer documentation.

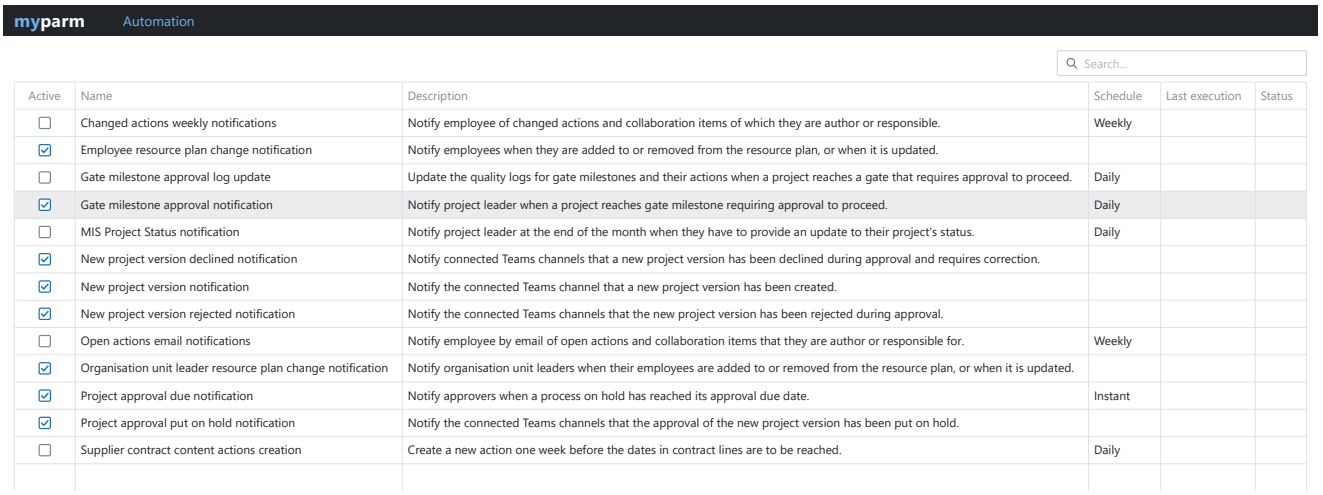
11.5 Automation

Menu: Admin > Configuration > Automation. **Who can see it:** users with the access right "Admin" and the Admin licence.

The Automation screen switches the automatic actions of myPARM on and off. There are two kinds of items:

- **Scheduled rules** – actions executed by the automation engine in the database on a schedule, for example e-mail notifications about open actions or the automatic creation of actions. The engine checks every 10 minutes which rules are due. For these items a **Schedule** can be chosen and an execution log is available.
- **Settings** – switches for actions that are triggered directly by user activity (for example a Microsoft Teams message when a new project version is created, or an e-mail when a resource plan changes). These items have no schedule and no log.

All changes on this screen are saved immediately; there is no Save button.



The automation list (upper grid)

- **Active** – checkbox. Click the cell and tick/untick it to switch the item on or off. The change is saved at once.
- **Name** – name of the automation.
- **Description** – what the automation does.
- **Schedule** – how often a scheduled rule runs. Click the cell and pick a value from the drop-down; the change is saved at once. For settings the drop-down is disabled. Values:
  - **Instant** – at every run of the engine (approximately every 10 minutes).
  - **Quarter hourly** – once per quarter of an hour.
  - **Hourly** – once per hour.
  - **Daily** – once per day.
  - **Weekly** – once per week (week starting Monday).
  - **Monthly** – once per month (from the first day of the month).

  A rule runs at the first engine run after the start of its schedule interval, unless it has already run successfully within that interval.
- **Last execution** – date and time of the last run of a scheduled rule (empty for inactive items and for settings).
- **Status** – result of the last run: green dot = successful, red cross = failed (see the execution log). Empty for inactive items, for settings and for rules that never ran.
- **Search box** above the grid.

Click a row to focus it; for a scheduled rule the log of its last 15 runs is loaded into the lower grid.

The execution log (lower grid)

- **Status** – green dot = successful, red cross = error.
- **Execution date** – date and time of the run.
- **Duration in seconds**.

- **Error** – error text, if the run failed.
- **Search box** above the grid.

Available automations

Which items are listed depends on the installation and the version; new rules are delivered inactive; switch them on as needed. The four Teams notifications are active by default. Typical items:

Scheduled rules:

- **Project approval due notification** – "Notify approvers when a process on hold has reached its approval due date."
- **Open actions email notifications** – "Notify employee by email of open actions and collaboration items that they are author or responsible for."
- **Changed actions weekly notifications** – "Notify employee of changed actions and collaboration items of which they are author or responsible."
- **Gate milestone approval notification** – "Notify project leader when a project reaches gate milestone requiring approval to proceed."
- **MIS Project Status notification** – "Notify project leader at the end of the month when they have to provide an update to their project's status."
- **Gate milestone approval log update** – "Update the quality logs for gate milestones and their actions when a project reaches a gate that requires approval to proceed."
- **Supplier contract content actions creation** – "Create a new action one week before the dates in contract lines are to be reached."

Settings:

- **Employee resource plan change notification** – "Notify employees when they are added to or removed from the resource plan, or when it is updated."
- **Organisation unit leader resource plan change notification** – "Notify organisation unit leaders when their employees are added to or removed from the resource plan, or when it is updated."
- **New project version notification** – "Notify the connected Teams channel that a new project version has been created."
- **New project version declined notification** – "Notify connected Teams channels that a new project version has been declined during approval and requires correction."
- **Project approval put on hold notification** – "Notify the connected Teams channels that the approval of the new project version has been put on hold."
- **New project version rejected notification** – "Notify the connected Teams channels that the new project version has been rejected during approval."

E-mail notifications require a configured e-mail server. Teams notifications are sent only when a Parm administrator has switched on the Microsoft Teams integration for the

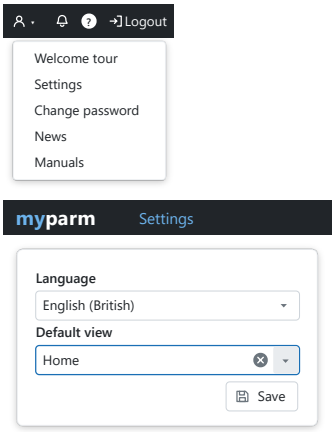
installation and the project has connected, active channels; the setup is described in the manual "Microsoft Teams integration".

Procedure: switch an automation on or off

1. Find the item (use the search box).
2. Click the **Active** cell and tick or untick the checkbox. The change is saved immediately.
3. For a scheduled rule, click the **Schedule** cell and choose how often it should run.
4. Check the **Last execution** and **Status** columns after the next run; click the row to see details and error texts in the execution log.

11.6 User settings (person icon > Settings)

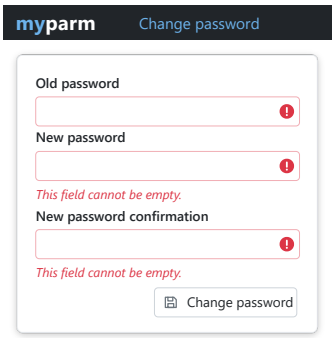
Menu: click the **person icon** at the right end of the navigation bar and choose **Settings** (page header "Settings"). The user menu contains, in this order: **Welcome tour**, **Settings**, **Change password**, **News**, **Manuals**. **Who can see it:** every logged-in user. It is listed here because it is part of the administration module.



- **Language** (drop-down with search, required) – the language of the user interface for the current user.
- **Default view** (drop-down with search, optional, can be cleared with the x) – the page that opens after login. Only pages the user may access are offered.
- **Save** – green when valid changes exist. After saving, the message "Settings have been changed. The page is about to be reloaded." appears; confirm it and the application restarts with the new settings.
- Leaving with unsaved changes asks "Are you sure you want to leave without saving? All of your changes will be lost."

11.7 Change password (person icon > Change password)

Menu: person icon > **Change password** (page header "Change password"). **Who can see it:** the item is shown only if the user logs in with a myPARM user name and password (myPARM authentication), or if the HR setting "Allow users to change password" is switched on. Users who log in through an external identity provider (e.g. Entra ID) without that setting do not see it.



- **Old password** (required, max. 32 characters).
- **New password** (required, max. 15 characters). The password policy of the installation is checked while you type; depending on the configured rules the following hints can appear in red under the field:
  - "Password must be at least <n> characters long."
  - "Password must contain at least one uppercase letter (A-Z)."
  - "Password must contain at least one lowercase letter (a-z)."
  - "Password must contain at least one digit (0-9)."
  - "Password must contain at least one special character (e.g., !@#$%^&*)."
  - "Password must meet at least <n> of the following requirements: uppercase letters, lowercase letters, digits, and special characters."
  - "Password cannot include your login, name, or other personal information."
  - "Maximum length of password exceeded."
- **New password confirmation** (required, max. 15 characters) – must equal the new password, otherwise "Password does not match the confirm password." is shown.
- An empty required field is framed in red with an error icon, and the message "This field cannot be empty." can appear under it.
- **Change password** button – green when the form is valid and changed. Result messages:
  - "Password has been changed." – the form is cleared.
  - "Password has not been changed, please make sure the old password is correct."
- Leaving the page with unsaved entries asks "Are you sure you want to leave without saving? All of your changes will be lost."

12. Other administrative work

12.1 Working in TET on behalf of another employee

Administrators can record times and expenditures for other employees. This is done in the normal TET screens (menu TET > Timesheet, TET > Expenditures) by switching to the other

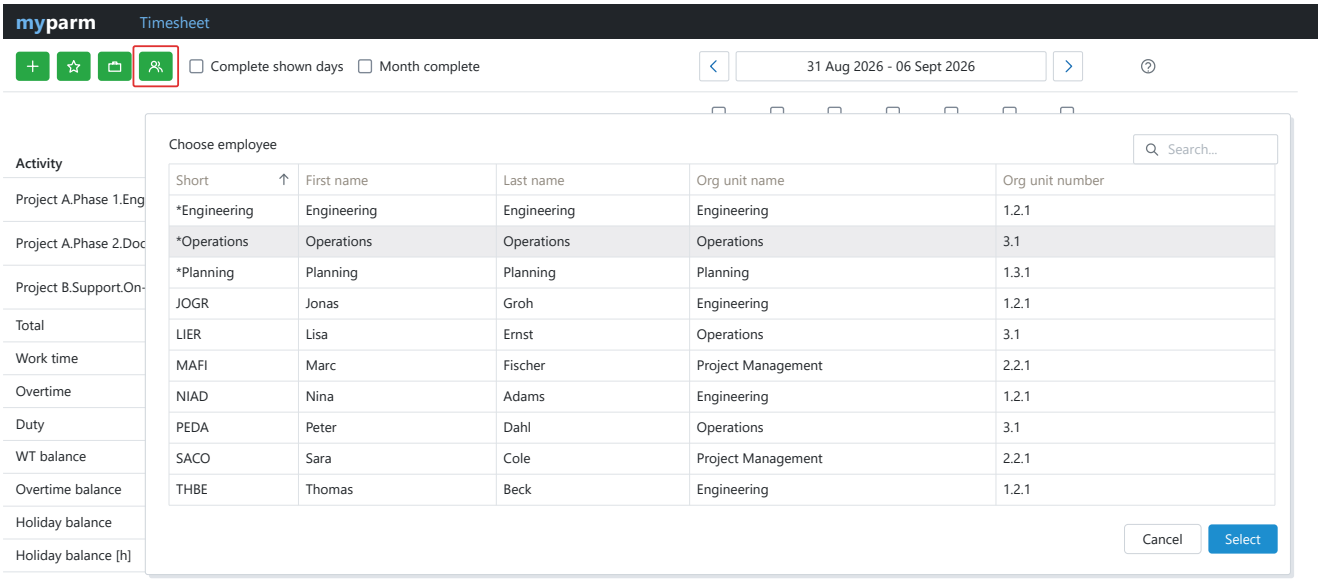
employee. How the timesheet and the expenditures are used is described in the manual "Time and expense tracking".

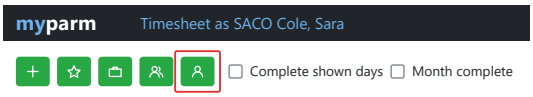
Who can switch:

- The button "Switch to different user" (icon: group of people, green) is shown in the toolbar of the Timesheet and of the Expenditures only to users with the access right "TET admin" or "TET manager".
- The extended rights described in "Behaviour of the relaxed validation" in this section (durations of more than 24 h, negative amounts, editing in temporarily closed periods) apply only to users with the access right "TET admin", and only while they work through the employee list. A TET manager acting for another employee cannot exceed 24 hours.
- Negative amounts and durations of more than 24 h can never be entered directly in your own timesheet or expenditures. To record them for themselves, TET admins must pick themselves from the employee list first.

Procedure:

1. Open TET > Timesheet (or TET > Expenditures).
2. Click "Switch to different user" in the toolbar.
3. The dialog "Choose employee" opens. It contains a search box and a grid with the columns Short, First name, Last name, Org unit name, Org unit number. Only employees the logged-in user is allowed to work for are listed.
4. Select the employee and click "Select" ("Cancel" closes the dialog without change).
5. The page reloads for the chosen employee. The page title changes to "Timesheet as <employee>" (or "Expenditures as <employee>"); the date range you were looking at is kept.
6. To return to your own data click "Switch to myself" (icon: user, green). This button is visible only while you work on behalf of someone.





Behaviour of the relaxed validation (TET admin on behalf of another employee):

- Time entries: negative durations and durations of more than 24 h, up to 500 h in either direction, can be entered only by a TET admin working through the employee list. An entry with a duration of more than 24 h or less than -24 h is saved as a correction entry and cannot have a start and end time. Normal users cannot change or delete a correction entry afterwards; they get the message "You are not able to modify this entry. Please contact your administrator." Only a TET admin working through the employee list can edit the entry again. In the mobile app a correction entry is completely read-only. Separately, in the mobile app the time fields of entries with a negative duration, a duration of 24 h or more, or an end at midnight are locked, while the other fields can still be edited (see the manual "Mobile timesheet").
- Expenditures: negative values for Units and Unit price are accepted (values between -0.01 and 0.01 remain invalid, i.e. zero is not allowed). Normal users cannot enter negative values. Correction expenditures and imported expenditures can be changed only by a TET admin in this mode.
- Cost accounts that are not flagged as TET-relevant can be used by the TET admin in this mode; for normal users they are rejected.
- Temporarily closed periods: a TET admin working on behalf may still record and change entries in a temporarily closed period; the first editable date is the start of the temporarily closed period instead of the start of the open period. Permanently closed periods remain locked.
- Everything else (approved entries, invoiced entries, closed PLAs, completed days) stays locked as for normal users.

Expenditures only: the toolbar also contains the button with the folder icon, which switches to recording expenses directly on a PLA ("Project expenditures"); see the manual "Time and expense tracking". When a TET admin works in this mode, the same relaxed validation applies.

12.2 Task templates

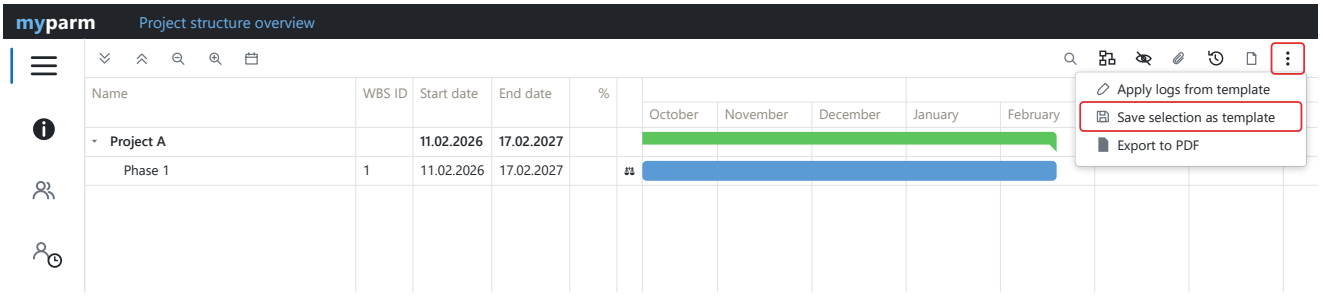
Task templates are reusable parts of a project structure. They are created from an existing project, maintained on the page Project > Task templates and applied when a project is created or when its structure is edited.

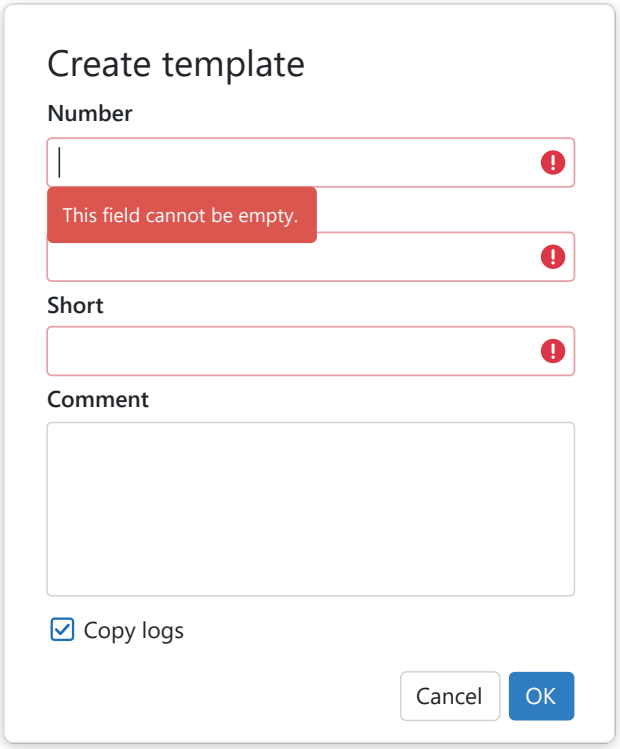
Access: the menu item Project > "Task templates" and the action "Save selection as template" are available only to users with the access right "Can maintain task templates" (PM licence required). The predefined role "Task Template Administrator" contains this access right (see 10.3 Roles). Applying a template needs no special right. How templates are used in projects is also described in the manual "Project creation and management".

Create a template from a project

1. Open Project > Project portal and open the project in read-only mode with the magnifying-glass button "Show project structure" of the project row.
2. In the project structure (Gantt) select the element that becomes the template: the project itself, a summary or a single activity/PLA. Everything below the selected element is copied.
3. Click the three-dots button "More..." at the top right of the structure and choose "Save selection as template" (both are marked with a red frame in the figure). (If nothing is selected the message "Please select activity first." appears.)
4. The dialog "Create template" opens with the fields:
   - Number – required, numbers only, max. 10 characters, must be unique
   - Name – required, max. 50 characters, must be unique
   - Short – required, max. 20 characters, must be unique
   - Comment – optional, max. 255 characters
   - Copy logs – checkbox; when ticked, the tasks, risks, quality entries and comments recorded on the copied elements are stored with the template
5. Click "OK". The message "Template has been created." appears. "Cancel" closes the dialog without saving.

In read-only mode the same three-dots menu also contains "Apply logs from template" and "Export to PDF" (prints the structure); templates themselves can be applied only in edit mode. In edit mode it contains "Apply template", "Apply logs from template", "MS Project file import" and "Export to PDF".



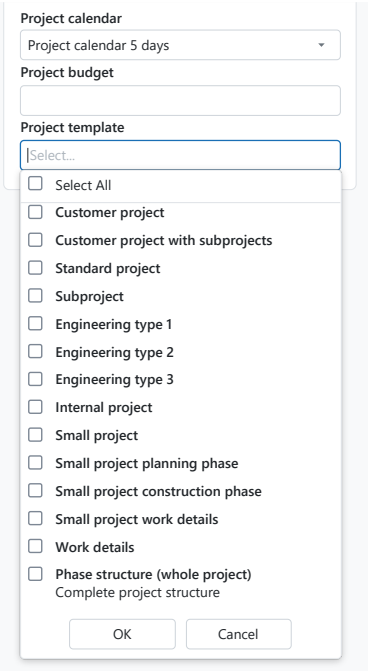


Apply a template

When creating a project:

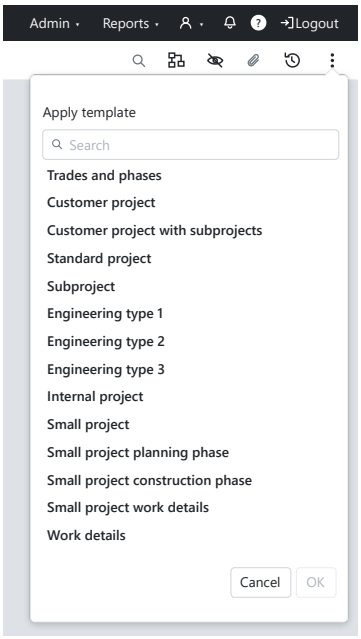
1. In the Project attributes step of the "Initiate project" process the field "Project template" is shown in the section "Project attributes". It is a multi-select list with search; several templates can be chosen; confirm the selection with the OK button inside the list.
2. The chosen templates are inserted into the new project structure when you continue the process.

The field is also offered when an idea is promoted to a project. It is not shown when editing the attributes of an existing project.



In the project structure:

1. Open the project in "Edit project structure" (editable mode).
2. Select the project element or a summary under which the template is to be inserted.
3. Click the three-dots button "More..." and choose "Apply template".
4. A popover "Apply template" opens with a searchable list of the active templates (name and comment). Select one and click "OK".
5. The elements of the template are inserted below the selected element, starting at the start date of the selected element. Save the structure afterwards.



Messages and restrictions:

- "Please select the project or summary first." – a leaf activity was selected.
- "Template cannot be applied on or within closed PLA."
- "Task templates containing PLAs cannot be applied to summaries that fall under an existing PLA."
- "Cannot apply the selected template because it is no longer active." / "... because it has been deleted."
- "Apply logs from template" (same menu, in read-only and edit mode) copies only the logs stored with a template to the selected, already saved element. Messages: "Please select any element first.", "Please save your changes in order to apply logs.", "Logs cannot be applied to historical project versions."
- PLAs defined in the template are created on the corresponding activities, with the template's values; anything left empty is taken from the project's PLA defaults.

Maintain templates (Project > Task templates)

The page consists of a list on the left and a detail panel on the right.

List (grid) toolbar:

- Plus button – adds a new template (the detail panel opens with empty fields).
- "Reorder" (sort button) – opens a dialog in which the templates can be dragged into a new order; confirm with "Reorder", leave with "Close". The button is grey while there are unsaved changes ("Save your changes to be able to reorder items.").
- Search box and filter row.

List columns:

- Green arrow button (first column) – starts or continues the process "Edit task template structure" for the template (see "Edit the structure of a template" in this section). Available only for saved templates.
- Active – check mark when the template can be selected in projects
- Position – order in which the templates are offered
- Name
- Comment
- Documents button (paper clip) – documents attached to the template
- Trash button – deletes the template after the confirmation "Do you really want to delete this item?". Templates can be deleted at any time.

Detail panel fields:

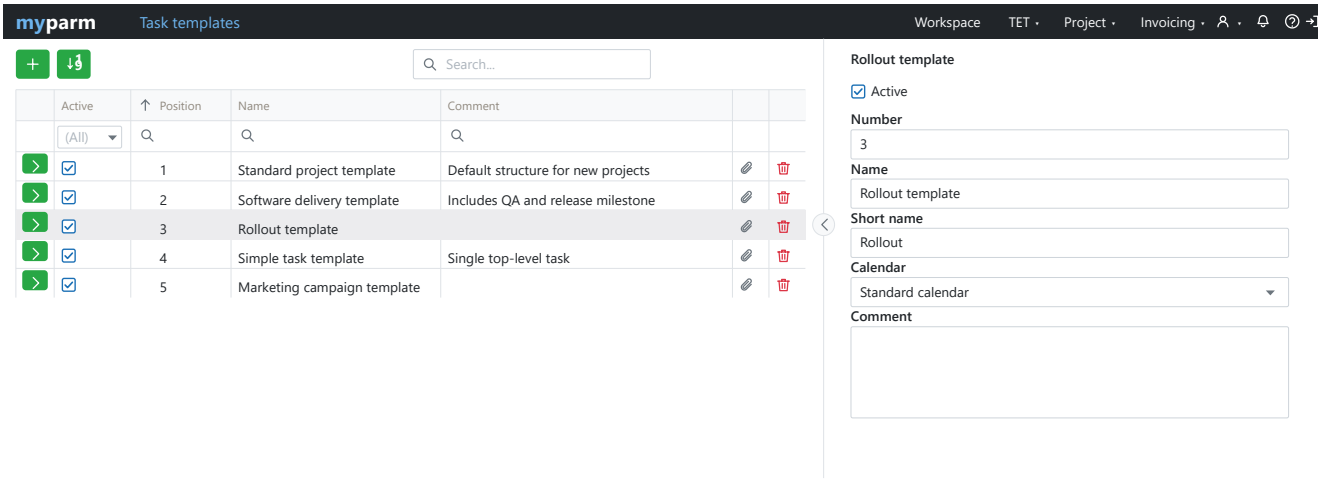
- Active – checkbox; inactive templates are not offered in projects
- Number – required, numbers only, unique
- Name – required, unique, max. 50 characters
- Short name – required, unique, max. 20 characters
- Calendar – required, select one of the project calendars
- Comment – max. 255 characters

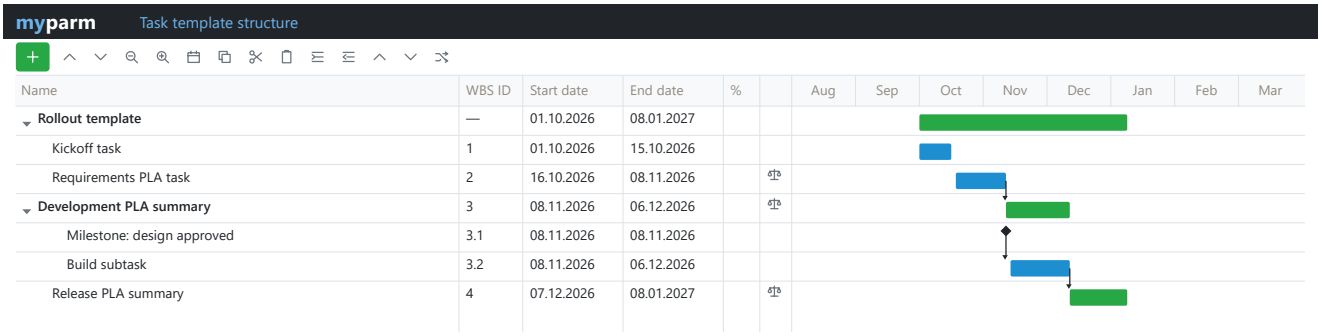
Click "Save" at the bottom right to store the changes (green when there is something valid to save).

Edit the structure of a template:

1. Click the green arrow button of a template and choose the process "Edit task template structure" (start or continue).
2. The template opens in a Gantt editor that works like the project structure editor (add, move, delete elements, dependencies, details panel). Since a template has no team, attributes or TET settings, this view has no left-hand navigation sidebar.
3. A PLA can be defined directly on a template's activity: an eligible activity (not a milestone, and not under a PLA higher in the tree) shows the button "Create PLA", where a Revenue type and a PLA type can be set. Once created, the button "Remove PLA" becomes available.
4. Buttons at the bottom right: Logs (switch between structure and the logs of the template: "Logs" / "Task template structure"), "Save", "Save & Approve" (finishes the process),

"Close".





12.3 Change team members

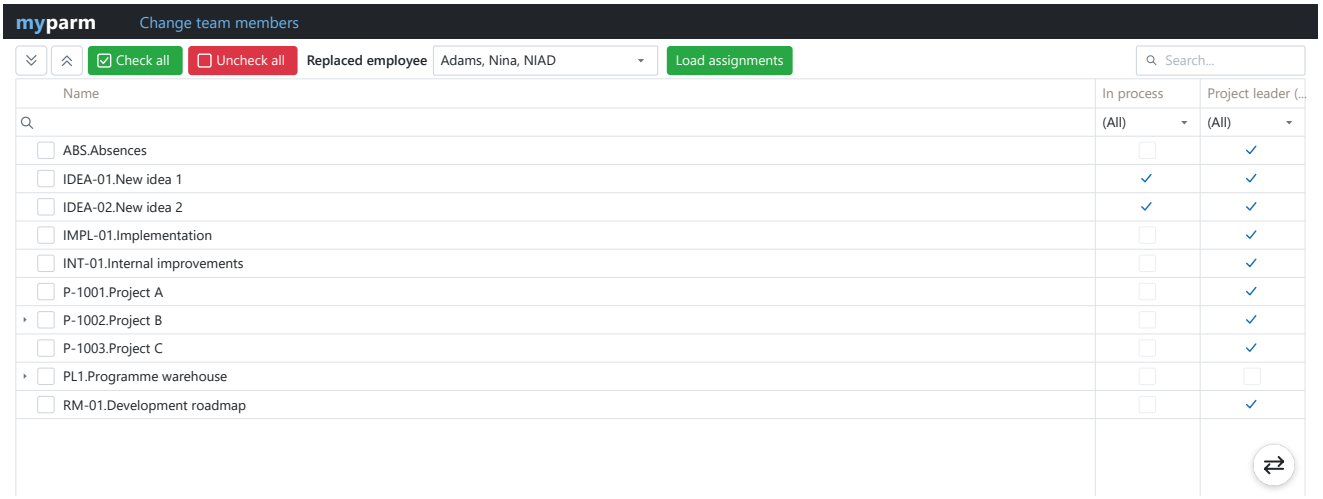
Menu Project > "Change team members". The page is shown only to users with the access right "Admin" and the Admin licence; it is not available in the SaaS Standard version. It replaces one employee by another in the teams of projects and activities.

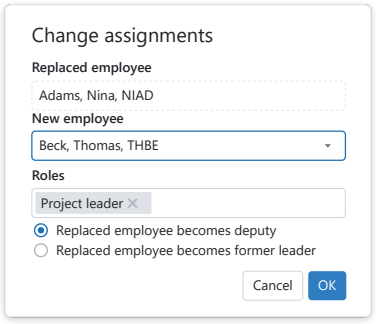
Procedure:

1. In the toolbar select the "Replaced employee" (searchable list of all employees; required).
2. Click "Load assignments". The tree below lists all projects (top level) and activities (children) in which the employee has a role.
3. Tree columns: "Name", "In process" (check mark when a draft/unsaved process exists for the object), and one checkbox column per role (e.g. Project leader, Deputy, Member ...).
4. Tick the rows to change. Helpers in the toolbar: "Expand all", "Collapse all", "Check all" (green) and "Uncheck all" (red). Search box and filter row are available.
   - Rows marked "In process" cannot be selected: "Cannot select object which is currently in process."
   - Rows where the employee is no longer in the team cannot be selected: "Cannot select object which team does not include selected employee."
   - "Check all" expands all projects and selects every selectable row.
5. Click the round swap button at the bottom right ("Change assignments"; it is highlighted when rows are selected). Without a selection the message "Please select at least one assignment." appears.
6. The dialog "Change assignments" opens:

- Replaced employee – read-only
- New employee – required; only active employees other than the replaced one are offered
- Roles – multi-select; after choosing the new employee the list is filled with the roles that employee owns and all of them are preselected; at least one role is required
- Option "Replaced employee becomes deputy" (default) or "Replaced employee becomes former leader"

7. Click "OK". If something is missing, the message "There are missing or wrong values in this form." appears. After saving, the tree is reloaded and the selection cleared.





12.4 Project control – rebooking hours

Menu Project > "Project control" (access right "Can see Project control view", PM licence). The page shows on the left a tree of projects and their PLAs (filtered to status "Open" by default; filter, search, Expand/Collapse buttons) and on the right the tabs "Time", "Expenditures", "Invoices", "Payments" and "Budget". Above the tabs: a date filter (type, "From", "To"), the checkbox "Show closed PLAs", the view-state buttons and the report button. The tabs "Invoices" and "Payments" are not available in the SaaS Standard version.

Rebooking time entries to another activity is possible only when both conditions are met:

- rebooking has been switched on for the installation by a Parm administrator, and
- the logged-in user has the access right "Admin".

Otherwise the "Time" grid has no checkboxes and no pencil.

Procedure:

1. Select a project (or PLA) in the tree and open the tab "Time".
2. Tick the entries to rebook (checkboxes in the first column; the header checkbox selects all selectable entries on all pages). The toolbar shows "Selected: N".
3. Click the pencil button "Select activity" (green when entries are selected; otherwise the message "Please select at least one timesheet entry." appears). The pencil and the counter are marked with a red frame in the figure.
4. The activity selector opens in a full-screen dialog:
   - Page "Projects": searchable list with columns Project and Project type. Click a project.
   - Page with the activity tree of that project (columns Activity, Start date, End date). The blue back arrow in the header returns to the project list. If all selected entries belong to one project/activity, that project/activity is preselected.
   - Select the target activity and click "Select" ("Cancel" aborts).
5. The entries are moved. Entries moved to another project disappear from the grid; the Expenditures tab is reloaded if the moved entries had linked expenditures. Only whole entries are moved; the dialog offers only activities that are valid for the date range of the selected entries.

Entries that cannot be rebooked are shown with a greyed, disabled checkbox. Click the checkbox to see the reason(s) in a message:

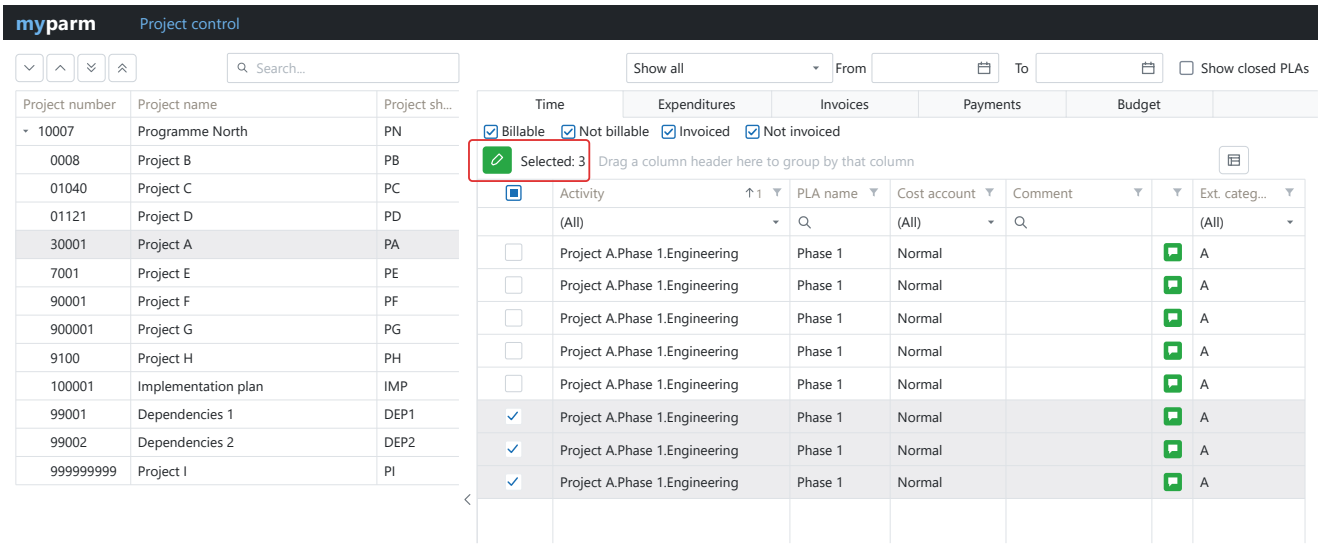
- "Timesheet entry is invoiced."
- "Timesheet entry has linked expenditures that are invoiced."
- "Timesheet entry is in closed period."
- "PLA is temporarily closed or closed."
- "Project is inactive."
- the project is closed (a message is shown when the selected project has status Closed).

If no entry on the tab can be selected, clicking the header checkbox shows "No entry can be selected.". If the server rejects the move, one of these messages is shown and the grid is reloaded: "Timesheet entry is in closed period.", "Timesheet entry is invoiced.", "The activity you want to change is in closed project.", "The selected activity is in closed project.", "The activity you want to change is no longer open.", "The selected activity is no longer open.", "Timesheet entry has linked expenditures that are invoiced.", "The selected activity has been deleted.".

Other actions on the "Time" tab:

- Comment pencil (per row) – opens the dialog "Comment" (text area, max. 1000 characters, OK/Cancel) to change the comment of the entry. Visible only when a Parm administrator has switched on comment editing for the installation (no special access right). If the entry was deleted meanwhile: "It is not possible to change the comment because the entry has been deleted."
- Export, grouping, header filters, filter row and search are available on all tabs.

Other admin-relevant actions on this page: on the "Invoices" tab each row has the button "Show PDF" (creates or opens the invoice PDF; not possible for artificial or imported invoices – "This invoice is artificial, there is no PDF available." / "This invoice was imported, there is no PDF available.") and a documents button. On the "Expenditures" tab a documents button is available per row.



12.5 QR invoices (Swiss QR bill)

To print a Swiss QR bill on invoice PDFs the following master data must be prepared. The bank details and sender address pages are in the menu "Invoicing" (not available in the SaaS Standard version).

Bank details

Menu Invoicing > "Bank details" (access right "Can maintain bank details", Admin licence). List on the left (columns Active, Default, Name, Bank name, City; plus button, search, filter row, trash button with the confirmation "Do you really want to delete this item?"), details on the right, "Save" button at the bottom right.

Fields:

- Active – cannot be unticked while the entry is the default
- Default – only one entry can be default; ticking it also sets Active. The checkbox is disabled when another entry is already the default.
- Name – required, unique
- Bank name, Street, Number, Postal code, City, Country (select list, can be cleared)
- Account number, Account name
- Swift/BIC (max. 11 characters)
- IBAN (max. 42 characters) – for QR bills enter the **QR-IBAN** of the account here; a normal IBAN produces the error "The account number is not a QR-IBAN." when the PDF is created
- Clearing number, Bank business ID, Intermediator Id

Recommendation: give the QR entry a name starting with "QR" so that it can be recognised in the selection lists (not enforced by the software).

Sender addresses

Menu Invoicing > "Sender addresses" (access right "Can maintain sender addresses", Admin licence). Same layout as Bank details (columns Active, Default, Name, Company name, City).

Fields: Active, Default (same rules as for Bank details), Name (required, unique), Company name, Full company name, Attn, Street (required), Number, Department, Postal code (required), City (required), Country (required), PO Box, Phone, Mobile phone, Vat no., **QR customer number**, Fax, E-mail, Internet address.

- QR customer number: the 6-digit customer identification issued by the bank (part of the QR reference). It must be exactly 6 digits or empty; otherwise "QR customer number has to be 6 characters long and contain only numbers or remain empty." is shown and the record cannot be saved.

Customer address – external reference

Menu C&S > "C&S management" (or Invoicing > "C&S management"), customer, section "Addresses": in the address form (fields Active, Main, Customer, Supplier, Invoice, Site, External reference, Name, contact details) enter the "External reference" (max. 10 characters) of the invoice address. It is used as part of the QR reference together with the QR customer number and the invoice number. If the combination becomes too long, PDF creation reports "The QR reference is too long, check external reference and invoice number length.".

Invoice and contract

- Invoice (main attributes of the invoice draft): fields "Sender address" and "Bank details" (select lists with the entry "None"; read-only once the invoice is approved). Select the QR sender address and the QR bank details.
- Contract (Contract management, section "Invoice defaults"): fields "Invoice template", "Invoice logo" (only if logos are enabled), "Sender address" and "Bank details". Values set here are proposed on every new invoice of the contract.

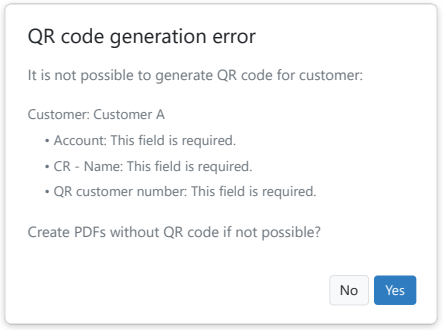
PDF creation and error dialog

When the invoice is approved or the PDF is created, the QR data is validated. If it is incomplete or invalid, the dialog "QR code generation error" opens. It shows the message "It is not possible to generate QR code for customer:", then per customer a list of the failing fields with the reason (e.g. "QR customer number: This field is out of range.", "Account: The account number is not a QR-IBAN.", "Reference: The QR reference is too long, check external reference and invoice number length.", "Total length of data is too large.") and finally the question "Create PDFs without QR code if not possible?". The field names follow the Swiss

Payment Standards for the QR-bill; "CR" stands for creditor (for example "CR - Name" is the name of the creditor).

- "Yes" – the step is repeated with the QR validation switched off; the PDF is created without the QR page.
- "No" – nothing is created; correct the master data and approve again.

The QR bill itself is printed on a separate page of the PDF with the reference line composed of the QR customer number, the external reference and the invoice number.



12.6 Definition of the risk fields (Risks tab layout for all users)

Where: open a project in read-only mode (Project portal, magnifying glass "Show project structure"), select an element and open the logs; tab "Risks". The same tab exists for other objects (contracts, BSC items, MIS instances).

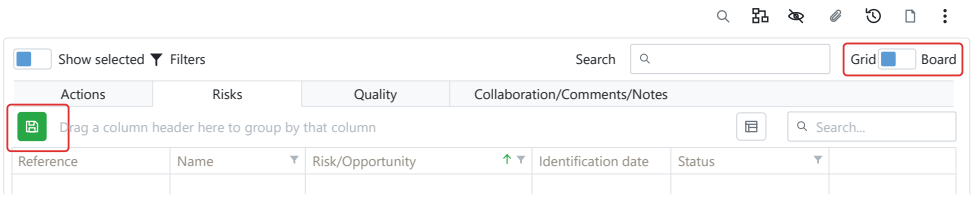
All users:

- Switch "Grid" / "Board" at the top right of the logs panel (marked with a red frame in the figure) – the grid shows the risks as a table, the board as Kanban columns by status (Backlog, Open, In progress, Pending, Closed).
- "Show selected" / "Show all" (if offered), filters, search box.

Administrators only (access right "Admin" plus the Admin licence, and the portal right of the object – for project elements "Project portal"):

- Column chooser (grid toolbar) – choose which risk columns are visible, e.g. Reference, Name, Identification date, Risk description, Category, Risk register, Risk/Opportunity, Impact, Impact description, Probability, Probability description, Proximity, Strategy, Strategy description, Risk owner, Impact after action, Probability after action, EMV, Date of last update, Author, Status, Tags.
- Column fixing, column order, widths, sorting and grouping can be arranged in the grid.
- Green "Save view" button (disk icon) in the grid toolbar (marked with a red frame in the figure) – stores the current grid layout (visible columns, order, widths, fixing, sorting, grouping) centrally for the object type.

Effect: the stored layout is loaded for every user who opens the Risks grid of that object type; it defines which risk fields the users see. Without a stored layout all columns are shown. Non-administrators have no column chooser and cannot change the layout.

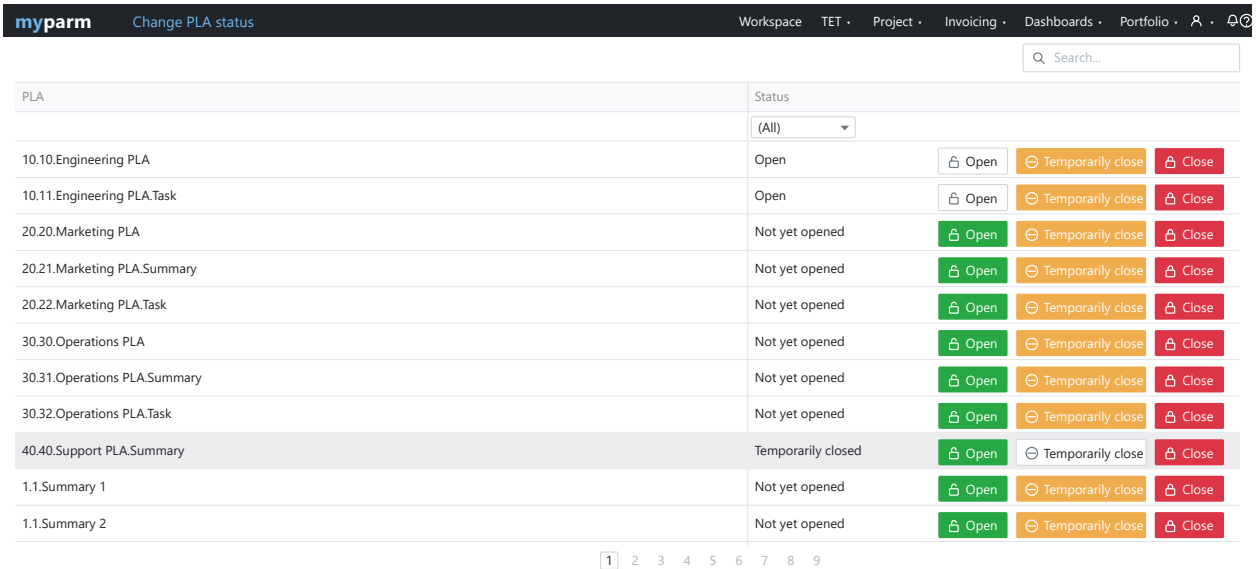


12.7 Change PLA status

The status of a PLA is changed on the separate page Project > "Change PLA status", described in this section. In the project itself, a PLA can only be opened (not closed), and only when a Parm administrator has enabled one or both of these options for the installation:

- opening a PLA directly from the IP/MP processes,
- opening PLAs automatically after project approval.

The page Project > "Change PLA status" requires the access rights "Can maintain PLA status" and "Project portal" and the PM licence. A searchable list shows every PLA that has not yet been permanently closed – including those still "Not yet opened" – with the columns "PLA" (formatted name) and "Status", and a **Status** filter ((All) or a specific status) above it. Each row has three buttons – "Open", "Temporarily close" and "Close". The button matching the PLA's current status is greyed out, since a PLA cannot be moved to the status it is already in. The page is also described in the manual "Project creation and management".



Statuses:

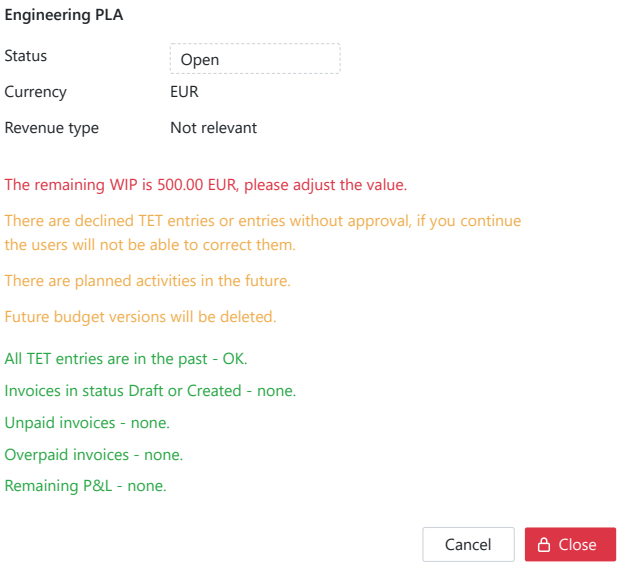
- **Not yet opened** – the PLA can be deleted from the project portal; hours and expenses cannot be recorded, but budgets can be created.
- **Open** – hours can be recorded, invoices can be stored, etc. An open PLA cannot be changed back to "Not yet opened".

- **Temporarily closed** – blocks time and expenditure recording; the PLA can be reopened at any time with "Open". Only administrators can make adjustments to a temporarily closed PLA; TET admins can still correct entries on behalf of employees (see 12.1 Working in TET on behalf of another employee).
- **Closed** – "Close" permanently closes an open PLA; it is then removed from the list. A permanently closed PLA cannot be reopened ("This PLA has been permanently closed and cannot be reopened."). The PLA's end date must fall within an open accounting period, otherwise the remaining profit/loss cannot be posted, the final budget cannot be created and the PLA cannot be closed.

Closing a PLA opens a wizard showing the PLA's **Status** (read-only), **Currency** and **Revenue type**, followed by a list of everything that needs to be resolved first, grouped by severity:

- Red entries block closing and must be resolved first, e.g. "There are invoices in Draft or Created status, please complete the invoicing processes.", "The remaining WIP is 500.00 EUR, please adjust the value.", "Obligo exists.", "Unpaid invoices: ...". While red entries are listed, clicking "Close" only shows the message "It is not possible to close PLA." and nothing is changed.
- Orange entries are warnings that let closing continue, e.g. "There are declined TET entries or entries without approval, if you continue the users will not be able to correct them.", "There are planned activities in the future.", "Future budget versions will be deleted.".
- Green entries are informational only, e.g. "All TET entries are in the past - OK.", "Invoices in status Draft or Created - none.", "Obligo - none.", "Unpaid invoices - none.", "Overpaid invoices - none.", "Remaining P&L - none.".

Confirm with "Close" or leave with "Cancel".



A confirmation appears at the bottom of the screen after each change ("<PLA> has been opened." / "... has been temporarily closed." / "... has been closed."). Concurrency messages: "The PLA status has already been changed by another user.", "A new version of project has been created by another user.", "This PLA has been removed.".

Parm AG · Bahnhofstrasse 31 · CH-8280 Kreuzlingen · +41 71 243 10 00 · info@parm.com · parm.com