

G 1 How to Create a New Project

Access level: Project Manager, Director and System Administrator

Learn: How to create a project's key information.

In TimeLog Project, the creation of a project has three steps. First the project's key information is registered, then the project will be broken down in one or more tasks and/or activities and thirdly the project participants are allocated to the tasks.

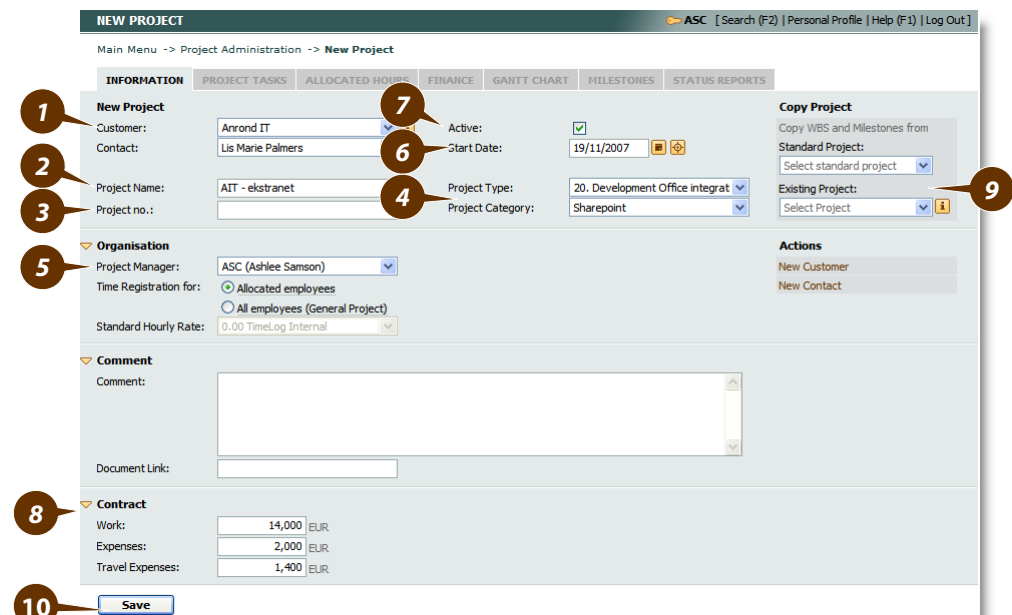
When you want to create a new project's key information:

Figure 1: Main Menu -> Project Administration -> New Project

- Select a *Customer*: 1 and if necessary, a *Contact*.*
- Enter a descriptive *Project Name*: 2. It can be beneficial to have a shortening of the project name in the beginning of the name, in this case "AIT".
- Enter a *Project no.*: 3. The project number can either be assigned automatically by the system or be entered manually.
- Select a *Project Type*: (mandatory) and if necessary, a *Project Category*.* 4. Project types and project categories are used in analysis and reports.
- Select a *Project Manager*: 5 Salesperson* or a Partner* and whether time registration should be possible for *All employees* (General project) or only for *Allocated employees*. If *All employees* (General project) is chosen, then the project will be visible on all the employees' time sheets. The *Standard Hourly Rate* will be used when time is registered on the project.
- Select a *Start Date*: 6. The start date is equal to the start date of the project's task plan.
- Tick off for *Active*: 7 if the project should be open for time registration.
- The project's *Contract Total* 8 is equal to the full sales price on the project, divided in *Work* (time), *Expenses* and *Travel Expenses*.
- The project's task plan can be copied from predefined standard projects or an existing project's task- and resource plan 9.
- Click on *Save* 10 to create the project. Learn more about tasks in ⇨ G2.

Tip: Copying task plans from standard projects saves time and standardizes the task structure.

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Tip: Fields marked with* can be hidden. Look in the System Administration (F10).