

Artologik ProjectManager 5.0

New features, September 2015

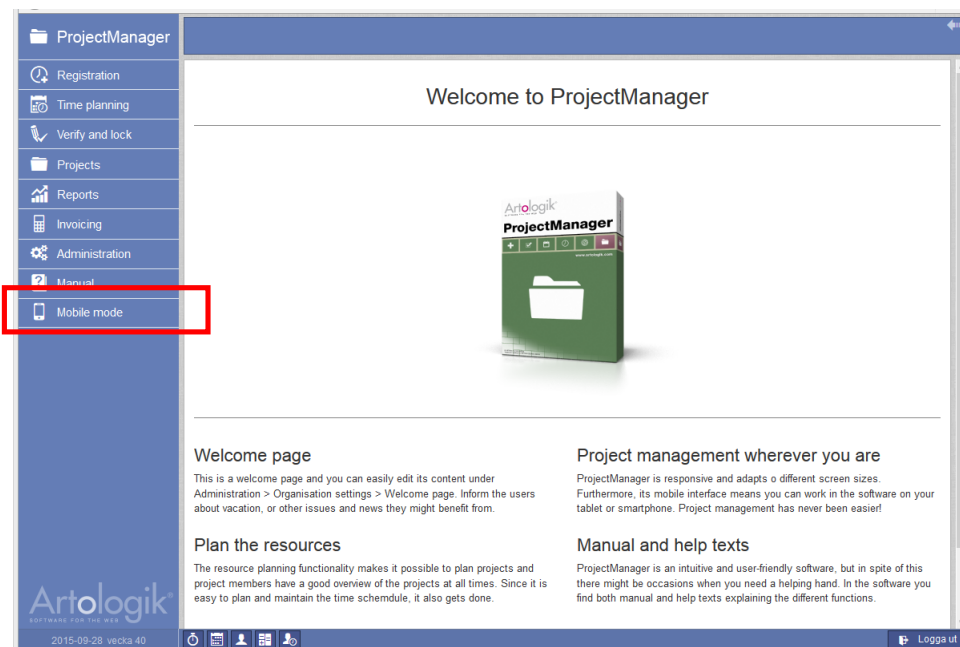
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General information

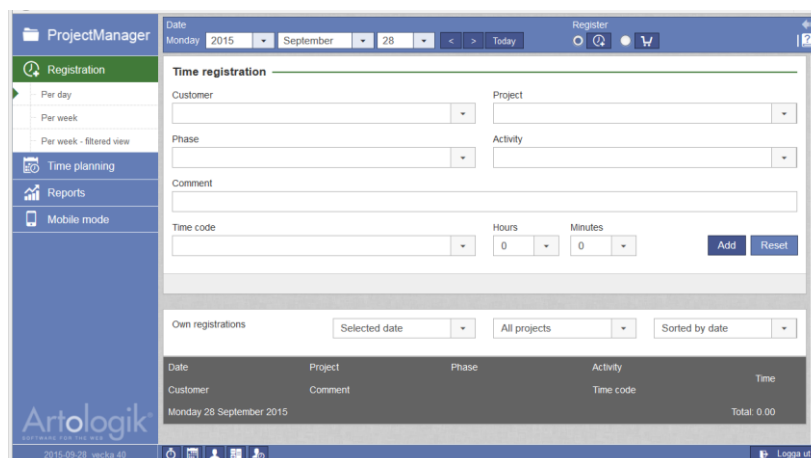
Improved interface

ProjectManager has a completely new interface! Apart from the new colours we have also changed the placement of the menu and made the program more user-friendly with an improved overview and simpler buttons. Additionally, there is a customised interface for use on your tablet or smartphone. You can easily change between mobile mode and desktop mode via a button in the main menu.



The TIME view has been integrated with the ProjectManager view

Earlier versions of ProjectManager was split in a project management view and a time registration view. In the new version there is one joint menu for all parts of the program. The menu only shows the parts of the program you have access to, just like in the old version. This means that a project member has one single menu to work with and can easily get started. Below is an example of a menu for a project member without extended viewing rights.



Registration

Holidays have been made visible

Public holidays are marked on pages for registration, no matter whether you choose to register per day or week.

Time registration

Customer:

Programme: Organisation program - 1

Project:

Phase:

Activity:

Project	Phase	Activity	Mon 21 Sep	Tue 22 Sep	Wed 23 Sep	Thu 24 Sep	Fri 25 Sep	Sat 26 Sep	Sun 27 Sep	Total
Pro ...	Sta ...	Custo...	5:00							5:00
		Meeting	3:00							3:00
	Cur...	Design		8:00			7:00			15:00
	coll ...	collab...					1:00			1:00
		Other projects:	1:00	1:00	0:00	0:00	0:00	0:00	0:00	2:00
		Total:	9:00	9:00	0:00	0:00	8:00	0:00	0:00	26:00

Registration per week – filtered view

If you are part of a larger project with many phases and activities, the list on the page *Registration > Per week* can be long and making it difficult to find the phase and activity you mean to register on. Through the new page *Registration > Per week – filtered view* you can make a selection based on *Customer, Programme, Project, Phase, Activity* or a combination of the options. As you click *Search* the list is considerably shorter and it is easier to find the correct row to register your time.

Set limits to when registrations can be added or changed

The system can allow different registration limits for separate users. To do so select this at the page *Administration > Organisation settings > Registration* under the heading *Registration limitations*. See red-marked rectangle below.

Organisation settings

- The welcome page
- Basic information
- Basic settings
- Invoicing
- Accounting
- Result units
- Time codes
- Registration
 - Registration limitations
 - Verification
 - User rights
 - Languages

Registration limitations

The minimum amount of minutes available for time registrations

Valid intervals for time registrations

	Minimum	Maximum
Per registration	0:00	8:00
Per user and day	0:00	16:00

Limited rights for the users who are allowed to register for others
 Yes
 No

Registration limitations at user level
 Yes
 No

On which activities is registration possible
 On all activities in an active project
 Only on active phases and activities

A new tab; *Registration limitations* will be visible on the left hand side. See marked rectangle in the picture on the left hand side. Under this tab you may define the various limitations you later want to use under the user information for each of your users. Registration are limited based on an interval of days before and after current date inside of which you may still register time.

Improved registration of products/services

When an employee has had an expense and is to be compensated including for VAT to his salary, VAT must be added manually. This is done for each registration of products/services. The VAT screen is only available if the products/services has the property *Include in Salary Details* selected.

The interface also displays what sum is transferred to the salary details.

Product registration

Customer	Private Interests Inc	Project	Procurement System - 3
Phase	Delivery	Activity	Administration
Supplier	Office Supplies Ltd	Product / Service	Pencils
Comment			

Quantity	Unit	Cost per unit	Cost	VAT	In salary	Price per unit	For invoicing
1	st	10.00	10.00	0.00	10.00	20.00	20.00

Projects

Improved interface for selecting project members

In the list of users on the left hand side you can select one or several persons and move them over to the list of members on the right hand side. With the help of the filter selection above, you may view users from one Result unit at a time. You may also undo your choice by selecting members in the list on the right hand side and moving them back to the list on the left hand side.

Result unit (for selection of users):
Result unit

Users	Members
Allum, Allan Bosso, Barbara Hansson, Hans Meier, Anna Moore, Marcus Müller, Tobias	Andersson, Jonas, Konsult Bengtsson, Bertil

Make the selected members, members of all the activities

Improved interface for administration of phases and activities.

Phases and activities may be administrated for a current project under *Projects > Phase administration* or for a more general overview under the administration menu at the tab *phases/activities*. In the new version of ProjectManager all project leaders can administrate their own, private, phases and activities.

Under *Projects > Phase administration* the phases and activities of the current project are administrated. Initially the page shows the standard phases and activities that are in the project type you have chosen for your project. You may either keep the standard structure, or customise your own, unique structure by creating your own phases and activities.

You may:

- Extend a phase with a new activity that was not included with the project type.
- Add more phases that were not part of the project type.
- Copy a phase in the system, either a public phase or your own private phase.
When you copy a phase you can give it a new name and rename the activities in the phase. New names are not altered when the original is altered

- Update the names of the activities, their description, cost and price.
- Update the name of phases, their description, cost, price and activities.

As a project leader you can use both public and private phases/activities but only edit your own. An administrator can edit all phases and activities, both public and private.

Activate/inactivate project members at project level

Project members

Criteria	Time planned	Time registered
Project: Program development BOOT	879:00	851:00
Phase: <input type="text" value="All"/>		
Activity: <input type="text" value="All"/>		
<input checked="" type="checkbox"/> Only display the members		
User group: <input type="text"/>		
Result unit: <input type="text"/>		
Search text: <input type="text"/>		<input type="button" value="Search"/>

Search result

Select a project leader and members from all users.
 Select All Phases to make the project member a member of all the project's phases
 Select All Activities to make the project member a member of all the project's phases and activities.

Leader	Member	Inactive	All phases	All activities	Family name, first name	Time planned	Time registered
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	X	X	Allum, Allan	300:00	200:00
<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	X	X	Bengtsson, Bertil	165:00	193:00
<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	X	X	Moore, Marcus	170:00	92:00
<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	X	X	Parker, Paul	193:00	37:00
<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	X	X	Projektattestare, Peter	26:00	168:00
<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	X	X	User, TIME	25:00	161:00

members you wish to deactivate.

Sometimes the composition of project members is changed. A member that has quit the project cannot be removed when earlier registrations has been made. However, there is a possibility to inactivate the individual. The user cannot make new registrations for the project when inactivated.

The inactivation is done from the project menu under the tab *members* or the tab *Phase administration*. In the latter alternative, a new window with the page *Project members* is opened after clicking the linked name of a phase or an activity. Choose the intended phase and activity or choose all. Check the box *Only display the members* and click *search*. Select the

Cost and price analysis

Under project administration you decide which of five models is used to calculate cost and price for the project. The program fetches information as below, in order of priority:

- Fixed cost/price
Chosen at the tab *Project administration* via the button set cost/set price.
- Cost/price per hour at project level by:
 1. *Customer organisation*
 2. *Project type*
 3. *Standard* (a preset choice under *Administration > Organisation settings > Basic settings*)
- Cost/price per hour at phase level by:
 1. *Project type > Phase*
 2. *Phase*
 3. *Standard*
- Cost/price per hour at activity level by:
 1. *Project type > Phase > Activity*
 2. *Phase > Activity*
 3. *Standard*
- Cost/price per hour at user level by:
 1. *User*
 2. *Project type > Phase > Activity*
 3. *Phase > Activity*
 4. *Standard*

With the buttons *set cost/set price* you can make adjustment to the specific project.

Cost & price information

Advance payment

Agreement (net) Payment (net)

Comments

Cost & price

Cost model Price model

Invoicing

Hours for invoicing Invoice every worked hour Invoice max 8 hours per day and member Expense rate %

Locking/unlocking registrations

Locking registrations at system or project level disables adding, editing or removal of registrations for a date earlier than the locking date. By the setting *Administration > Organisation settings > Registration* it is determined if the system allows locking registrations at the project level. If this is the case, locking is administrated at the tab *Verify and lock > Lock projects*. In ProjectManager 5.0 it is thus easier to lock and unlock several projects simultaneously. Locking can also be made for one project at a time through the project administration.

It is now also possible to set two locking dates for each project; one temporary and one permanent.

If a project has two registration limitations, the *systems* locking date and another *program specific* date, the date closest in time takes precedent.

Reports


New report: Yearly report

Under the new report Yearly report the total registered time for the users is shown. You can find it on the tab *Reports > Monthly report > Yearly report*.

New report name

The report previously named *Time code report* is now named *Registered time*.

Export reports to Excel format

By clicking the Excel icon  on the page's upper right hand corner you may now extract following reports as excel files: *Project report, Project results, Time Report, Registered time, Planned time, Project list* and *Result report*.

Individual registrations in the time report Registered time

In the report's editing viewing you can find the option *Individual registrations*. Then specify what information to view. See red rectangle below.

Contents

Time period: From: To:

<p>Show as:</p> <p><input checked="" type="radio"/> List</p> <p><input type="radio"/> Table</p> <p><input type="radio"/> Table where the last sort order values form seperate columns</p>	<p>Contents:</p> <p><input checked="" type="checkbox"/> Time</p> <p><input type="checkbox"/> Cost</p> <p><input type="checkbox"/> Price</p>
<p><input checked="" type="radio"/> Individual registrations</p> <p><input type="radio"/> Only totals</p>	<p><input type="checkbox"/> Date</p> <p><input type="checkbox"/> User</p> <p><input type="checkbox"/> User group</p> <p><input type="checkbox"/> Customer</p> <p><input type="checkbox"/> Project type</p> <p><input type="checkbox"/> Project ID</p> <p><input type="checkbox"/> Project</p> <p><input type="checkbox"/> Activity</p> <p><input type="checkbox"/> Time code</p> <p><input type="checkbox"/> Comment</p> <p><input type="checkbox"/> Cost per hour</p> <p><input type="checkbox"/> Price per hour</p>

Sort order:

Total per sort order

More filtering options in time reports *Registered time* and *Planned time*

It is now possible to make a filtration on four levels in the time reports *Registered time* and *Planned time*. In the reports' editing view you choose how registration and planning is ordered and filtered. It is also possible to show sums for a data field, see blue square in above image. Decide what format the report is presented in; either as a list (as in the previous version), as a table or as a table where the last filtering value is shown in its own columns, see green square in the image above.

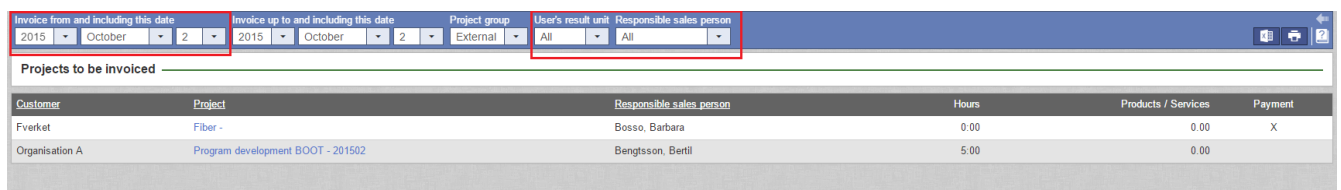
Hide users without planned time in the Gantt chart

In this version you can improve the over-view in your Gantt chart by hiding users who have no planned time. The setting is made under *Reports > Gantt chart > Edit reports > Edit report: Hide rows with no planned time*.

Invoicing

Easier to produce invoice details

When you want to view projects containing registrations which may be invoiced, you can limit the list by three new filtering options; from-date, the user's result unit and responsible sales person. By clicking the relevant heading the list is sorted by either customer, project name or responsible sales person.



The screenshot shows the 'Projects to be invoiced' interface. At the top, there are four filter sections: 'Invoice from and including this date' (2015, October, 2), 'Invoice up to and including this date' (2015, October, 2), 'Project group' (External), and 'User's result unit' (All). The 'Responsible sales person' filter is also set to 'All'. Below the filters, a table lists projects to be invoiced.

Customer	Project	Responsible sales person	Hours	Products / Services	Payment
Fverket	Fiber -	Bosso, Barbara	0.00	0.00	X
Organisation A	Program development BOOT - 201502	Bengtsson, Bertil	5.00	0.00	

Choose individual registrations when you create invoicing details or write off time

When creating invoicing details there is now the option of doing so for *individual registrations*.

Recover written off registrations

You may now recover registrations that have been written off. Do so under the tab *Invoicing > Invoicing details > Written off*.

Possible to insert text after invoicing sum

If you wish to add a text after the sum to be invoiced, it is now possible to write on the row closest under invoicing sum. An example of such a text could be *"Remarks with respect to an invoice must be made within 8 days, after 8 days the invoice will be considered approved by the recipient"*. The text cannot exceed 250 characters.

Control what information of your own organisation is visible on the invoice

Under *Administration > Organisation settings > Basic information* you can control what information of your own organisation that is visible on the invoice. It is possible to make one version for each country group (within the country, within the region and other countries).

Basic information

Check which information is to be printed on the invoice footer:

Information field	Domestic sales	Trade market sales	International sales	Enter information about your own organisation.
Organisation name:				CC Companions
Address:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	45 Highstreet
Postal code:				SL6 2RA
Town:				Meidenhead
Country:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	United Kingdom
Visiting address:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	45 Highstreet
Phone:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00 44 20 3349 2059
Fax:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00 44 20 3349 2060

More possibilities for invoicing

Under *Administration > Organisation settings > Invoicing* the administrator decides how the invoice is presented with respect to certain information. If the hourly price is not the same for all hours presented on the invoice, you may choose to only show the mean price in the summation. This might be more comfortable in case you don't wish to disclose what different hourly prices you apply for each user, see image on the right hand side. To add a mean price, see green-marked area on the image below.

Edit invoice details

Invoice details

A.00076

Customer

Municipality of Solkoeping

Description	Quantity	Price/unit	Amount
Concerns the period up to and inclusive 2015-12-15			
24 Municipality of Solkoeping customisation			
Ordinary time	11.00		8 500.00
Total	11.00	772.73	8 500.00
Net total			8 500.00

It is possible to edit what choices are selectable in the invoice. The administrator may choose to allow editing of customer number and customer name on an individual invoice without affecting the customer register. See red-marked area in the image below.

Another option is to insert how many hours that have been invoiced in earlier invoices on the project. See blue square below.

Default settings for invoice

- Show project number together with project name
- Show contact persons beneath project name
- Show only total amount if the setting 'Show only totals' is selected
- Show average price on the lines displaying the sum
- Add Product / Service and Time registrations (this disables the total per time code and Product / Service)
- Use editable invoice numbers
- Use editable customer names and numbers
- Add a row with information about previously invoiced amount of hours
- Add line with expense rate to invoices
- Add line allowing to round the total on invoices

Initial settings for new invoice details

Sum	Content
<input checked="" type="radio"/> Per project	<input checked="" type="radio"/> Show only totals
<input type="radio"/> Per phase	<input type="radio"/> Show all registrations
<input type="radio"/> Per activity	
<input checked="" type="checkbox"/> Per time code	
<input type="checkbox"/> Per product	

Administration

Extended possibilities to inactivate registrations in registers

When maintaining registers you may find that you wish to remove customers that are no longer relevant. If there are old registrations for these customers they need to remain in the register. However, you may choose to inactivate them so that they are not included in the selection-list of customers. This may also be done for suppliers and time codes.

Improved customer administration

It is now possible to set terms of payment per customer, while previously it could only be set as a general setting for all customers. You can find the setting under *Administration > Customers > Terms of payment*, and it's done per customer.

From the tab *New project/Project administration* you can reach the customer register to add a new customer or edit an existing one. If you have the empty row in the selection list *Customer*, a click on the pencil-icon will open a new window to allow you to edit customer information.

Connect products and services to customers

You may connect products and services to customers. The setting is made under *Administration > Organisation settings > Settings > Other*, select *yes/no* under *Connect products/services to customers*. See selected space in the picture below. The setting makes the administrator able to control which products/services are available for each customer, this limits selection at registration.

Alternative model for time planning

Normally when planning members' time in projects, one uses the Gantt chart at *Projects > Plan time*. As a new alternative, time can now also be planned *per user, month and project*. Instead of the Gantt chart, this planning is done at *Time planning > Time planning*, this view shows an entire year. Unlike the Gantt chart, time does not have to have an even spread, but more time may be allocated to especially intense months as you wish. It is also possible to plan no time.

At the tab *Administration > Organisation settings > Settings* under the heading *Other* the administrator may decide what planning model is used in the program. See blue square in the image above.

If the alternative model is selected, *per user, month and project* the tab *Project administration* will show the heading *planned time*. See image below. Here you assign a phase and activity where all time is planned. It is a conscious simplification of reality. Members still register time during all phases and activities inserted for the project.

You can control who is allowed to plan time. By default the project leader is the only one with access to plan member's time, but the project leader may also allow members to plan their own time. A user that is allowed to register time for another member may also plan time for this member. See red marked area in the image below.

Under the same heading it is also possible to present budgeted time. In reports you may make comparisons between budgeted and planned time. See blue-marked area below.

Time planned

Specify on which phase and activity the planned time is to be saved

Phase: Project Start

Activity: Project planning

Project budget: 50:00 planned hours

Plan time

- Project members can plan their own time
- The project leader can plan time for all members of the project
- A user who has the right to register time for a project member, can also plan the time of that member

Expected remaining time

In the new version of ProjectManager, registration of expected time (if any) must not be mandatory. First select that you wish to have a space to add expected time remaining, then you may choose if it is mandatory or not.

Double verification roles on project level

You may make the program require verification of registrations before they can be showed on salary and invoicing details. In earlier version of ProjectManager, the project leader was the only possible choice as verifier at project level. In the new version you may select a dedicated project verifier instead, if you wish. You may also decide that both roles are to be allowed to verify registrations belonging to a certain project.

Other settings

The comment field is compulsory when registering time

- Yes
- No

The sorting order for phases and activities

- Alphabetic order
- The order set by the project leader

Registration of estimated time left

- Yes (Is specified per user and activity)
 - Estimated time left is a compulsory field
- No

Integration with other software

With ProjectManager's webservice, you may import/update projects for another system. It is also possible to export time registrations. Contact us for further information on how the program's webservice may be used.