



FX-PROJECT®
OPEN SOURCE

Version 24

fx-project Open Source - Workflow FIRST STEPS



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1 General

fx-project version 24, as of October 2024

1.1 Brief Description

This tutorial explains step-by-step how to get started with fx-project.

Unless otherwise described, instructions always refer to the Ultimate version of fx-project, as it includes all functionalities.

1.2 Imprint

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2 Workflow: First Steps

The following section describes how the first steps can be taken in fx-project. Basically, it is recommended to create a separate client for the tests, which can be deleted again after a successful test.



Notice:

Since client no. 1 contains additional control functions, e.g. create new clients etc., it is better to manage real live data in a new client and to reserve client no. 1 only for the administration of the whole fx-project.

This procedure is not a must, but merely a suggestion from practical experience.

2.1 Login Client 1

When logging in to fx-project for the first time, the following information is entered in the "User Login" screen:

- **Client No.** **1** (Main Client No. 1)
- **User Name** **admin**
- **Password** **fxproject**

or the personal access data. With a click on the button "**Login**" the login takes place.

User login

Client No.: 1

User Name: admin

Password: fxproject

Login

(Figure 1: The screenshot may differ depending on the version)



2.2 Workflow: Administrator 1

The administrator of a client can set all necessary options for the respective client system. The settings apply to all users in the respective client as the default setting.

2.2.1 Client Settings 1

Administration ► Client ► Client Settings



Notice:

Create document archive folder, e.g. `/act/dms/fxp/` (for Linux) or `Z:\FXP\DMS\` etc. (for Windows). The web server must have full access to it, e.g. for the Apache server the Apache user under Linux, or for the IIS the Internet process account IUSR or IWAM under Windows.

DMS: The uploaded documents or copies of the sent emails are stored in this folder for each client. All other settings are already preset by default and can be changed as desired.

Settings made here apply to all clients unless they are overridden by administrators of other clients or users.



Settings ✓

Administration

↑ Allow assigning of individual person rights also for int. and ext. employees?	No	?
<input type="checkbox"/> ↓ Company currency	€	?
↑ Display hideable program functions in the menu	Yes	?
↑ Display program functions in the search menu to which the user is not authorized (yet)	Yes	?
↑ Display standard values in column selection?	Yes	?
<input type="checkbox"/> ↓ DMS: Path to document archive	Z:\FXP\DMS	?
↑ Email Option	0 - Setting according to fx_project.ini (Standard)	?
↑ Max. login trials	5	?
↑ Max. working hours per day	10.00	?
↑ Max. working hours per week	48.00	?
↑ Maximal amount of entries with pictures in a select field. (Note: 0=unlimited, but many entries with pictures can slow down the display of selection fields extremely!)	250	?
↑ Maximal amount of list datasets	250	?
↑ Person Unit 1: Person Day (PD) in Hours (Hrs.)	8.00	?
↑ Person Unit 2: Person Week (PW) in Person Days (PD)	5.00	?
↑ Person Unit 3: Person Month (PM) in Person Days (PD)	20.00	?
↑ Person Unit 4: Person Year (PY) in Person Days (PD)	250.00	?
<input type="checkbox"/> ↓ Person Unit: Unit for project effort fields	(Unit can be set individually by every person)	?
↑ Selection field: Start filtering in the search field only after an entered number of characters in the search field and/or after a certain number of list entries	3 / 750	?
<input type="checkbox"/> ↓ Value added tax rate 1: Standard rate (in percent)	20.00	?
<input type="checkbox"/> ↓ Value added tax rate 2: Reduced rate (in percent)	5.00	?
↑ Value added tax rate: List also all previously used rates in the selection field	No	?

Appointments

↑ Allow half vacation days or applications?	Yes	?
↑ Are ext. workforces allowed to take leave days (leave, special leave etc.)?	No	?
↑ General managers and project leaders can see all appointments	Yes	?
↑ Should the administration also be able to approve change requests for persons who have no direct manager?	Yes	?
↑ Vacation requests for persons who have no direct manager	Yes	?

(Figure 2: The screenshot may differ depending on the version)

Some settings, such as the "**DMS: Path to document archive**", can only be changed by the main administrator of client 1

Only after clicking the [**Save**] button on the top right, the entered data will be sent, checked and transferred to the database.



(Figure 3: The screenshot may differ depending on the version)



2.2.2 Client 1 - Basic Data

Creation ► Client ► Basic Data

If you are not yet in change mode, click the **[Change]** button in the action bar.



(Figure 4: The screenshot may differ depending on the version)

Select the client you want to change in the selection field. (After a new installation, there is only client 1 here).

To display the corresponding data, click the **[Select]** button.

(Figure 5: The screenshot may differ depending on the version)

Change the basic data of your main client 1 according to your wishes. Add icons or company logos.

Likewise, the username, email address or password of the main administrator can be changed.

(Figure 6: The screenshot may differ depending on the version)



Add addresses or communication data.

Addresses

Address Type	State	Street	Cntry	Code	Place
→ Main Address ▼		123 Sample Street	GB ▼	AA00 1BB	SMPL-PLACE
+ -select- ▼			-select- ▼		
+ -select- ▼			-select- ▼		

Communication

Communicat.Type	Number	Annotation
→ Standard Email Address ▼	info@samplecompany.xyz	
→ Standard Homepage ▼	https://www.samplecompany.xyz	
→ Standard Phone Number ▼	+00-123-456789	
+ -select- ▼		
+ -select- ▼		

(Figure 7: The screenshot may differ depending on the version)

Only after clicking the **[Save]** button on the top right, the entered data will be sent, checked and transferred to the database.



(Figure 8: The screenshot may differ depending on the version)



2.2.3 Client 1 - Create New Client

Creation ► Client ► Basic Data

As already described, it makes sense to carry out the tests in a separate client. This must be newly created by clicking on the **[Create]** button in the action bar.



(Figure 9: The screenshot may differ depending on the version)

Now enter the data of the new client. The definition mask is structured similarly as before in the change mode with the exception of the following two fields:

- **Client number:**
This can be freely selected as long as there is no client with this number. The field is always preset with the next free number (here: 2).
- **Client:**
If a client is selected as source here, some basic data (lookup values and user roles, see later) will be copied when creating the new client.

Definition

Client No.: 2 Name: Sample Company

Name affix:

Identif. No.:

User Name: admin Password:

E-Mail-Address: info@samplecompany.xyz Repeat Password:

(Figure 10: The screenshot may differ depending on the version)

An administrator is automatically assigned to each newly created client.

Once all the data has been entered, click on the **[Save]** button to send it, check it and transfer it to the database.

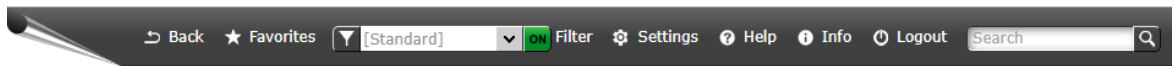


(Figure 11: The screenshot may differ depending on the version)



2.2.4 Logout Client 1

This completes the preparations for creating a new client. Now perform a "Logout" in the current client.



(Figure 12: The screenshot may differ depending on the version)



2.3 Login Client X

Now log in with the previously created administrator data in the newly created client, e.g. client 2.

A screenshot of a 'User login' dialog box. It has a light gray background and a title bar that says 'User login'. Inside, there are three input fields: 'Client No.: 2', 'User Name: admin', and 'Password: fxproject'. Below the fields is a 'Login' button with a gradient background and a shadow.

(Figure 13: The screenshot may differ depending on the version)

2.4 Workflow: Administrator X

The administrator of a client can set all necessary options for the respective client system. The settings apply to all users in the respective client as the default setting.



2.4.1 Client Settings X

Administration ► Client ► Client Settings

All settings are already preset by default and can be changed as desired.

Settings made here apply to the entire client.

Administration	
↑ Allow assigning of individual person rights also for int. and ext. employees?	No
<input type="checkbox"/> ↓ Company currency	€
↑ Display hideable program functions in the menu	Yes
↑ Display program functions in the search menu to which the user is not authorized (yet)	Yes
↑ Display standard values in column selection?	Yes
<input type="checkbox"/> ↓ DMS: Path to document archive	Z:\FXP\DMS
↑ Email Option	0 - Setting according to fx_project.ini (Standard)
↑ Max. login trials	5
↑ Max. working hours per day	10.00
↑ Max. working hours per week	48.00
↑ Maximal amount of entries with pictures in a select field. (Note: 0=unlimited, but many entries with pictures can slow down the display of selection fields extremely!)	250
↑ Maximal amount of list datasets	250
↑ Person Unit 1: Person Day (PD) in Hours (Hrs.)	8.00
↑ Person Unit 2: Person Week (PW) in Person Days (PD)	5.00
↑ Person Unit 3: Person Month (PM) in Person Days (PD)	20.00
↑ Person Unit 4: Person Year (PY) in Person Days (PD)	250.00
<input type="checkbox"/> ↓ Person Unit: Unit for project effort fields	(Unit can be set individually by every person)
↑ Selection field: Start filtering in the search field only after an entered number of characters in the search field and/or after a certain number of list entries	3 / 750
<input type="checkbox"/> ↓ Value added tax rate 1: Standard rate (in percent)	20.00
<input type="checkbox"/> ↓ Value added tax rate 2: Reduced rate (in percent)	5.00
↑ Value added tax rate: List also all previously used rates in the selection field	No
Appointments	
↑ Allow half vacation days or applications?	Yes
↑ Are ext. workforces allowed to take leave days (leave, special leave etc.)?	No
↑ General managers and project leaders can see all appointments	Yes
↑ Should the administration also be able to approve/reject requests for persons who have a vacation request?	Yes
↑ Vacation request for persons who have a vacation request?	Yes

(Figure 14: The screenshot may differ depending on the version)

Only after clicking the **[Save]** button on the top right, the entered data will be sent, checked and transferred to the database.



(Figure 15: The screenshot may differ depending on the version)



2.4.2 User Settings

Administration ► Users ► User Settings

All settings are already preset by default and can be changed as desired.

Settings made here apply **only to the own user**.

Settings	
Appointments	
↑ Sort appointments in the control center by persons instead of date?	Yes
Format/Design	
<input type="checkbox"/> ↓ Adjust field border color according to the filter settings?	Yes
↑ Calendar Month: Change calendar month from day X on (1 <= X <= 30)	20
↑ Century change when smaller than ...	20
<input type="checkbox"/> ↓ Date format	mm/dd/yyyy
<input type="checkbox"/> ↓ Decimal separator	.
↑ Display time spans in decimal format?	No
↑ Post-decimal positions	2
↑ Time format	HH:nn
General	
<input type="checkbox"/> ↓ Each filter setting can be switched on or off?	Yes
↑ List entries per page (Display Mode)	15
<input type="checkbox"/> ↓ List entries per page (Editing Mode)	2
Program Functions	
↑ Keep actual action when changing program functions?	No
↑ Restore last program function on program start? (NO = Start with the control center)	Yes
Projects	
↑ Display prefix for sub projects and tasks?	Yes
↑ Sort main projects in the project menu by project number instead of project name?	Yes
↑ Sort projects in selection fields by project number instead of project name?	Yes

(Figure 16: The screenshot may differ depending on the version)

Only after clicking the [**Save**] button on the top right, the entered data will be sent, checked and transferred to the database.



(Figure 17: The screenshot may differ depending on the version)



2.4.3 Client X - Basic Data

Creation ► Client ► Basic Data

Go to the **[Change]** mode.



(Figure 18: The screenshot may differ depending on the version)

The selection field contains only the own client. To display the corresponding data, click the **[Select]** button.

(Figure 19: The screenshot may differ depending on the version)

Change the basic data of your working client X according to your wishes. Add icons or company logos.

Likewise, the username, e-mail address or password of the main administrator can be changed. If, on the other hand, you leave the password field blank, **no** password change will take place, i.e. it will not be deleted.

(Figure 20: The screenshot may differ depending on the version)



Add addresses or communication data.

Addresses

Address Type	State	Street	Cntry	Code	Place
→ Main Address ▼		123 Sample Street	GB ▼	AA00 1BB	SMPL-PLACE
+ -select- ▼			-select- ▼		
+ -select- ▼			-select- ▼		

Communication

Communicat.Type	Number	Annotation
→ Standard Email Address ▼	info@samplecompany.xyz	
→ Standard Homepage ▼	https://www.samplecompany.xyz	
→ Standard Phone Number ▼	+00-123-456789	
+ -select- ▼		
+ -select- ▼		

(Figure 21: The screenshot may differ depending on the version)

Only after clicking the **[Save]** button on the top right, the entered data will be sent, checked and transferred to the database.



(Figure 22: The screenshot may differ depending on the version)



2.4.4 Client X - Contact Person

Creation ► Client ► Contact Person

Go to the **[Change]** mode.



(Figure 23: The screenshot may differ depending on the version)

Change the data of the client's contact person here according to your wishes. Add photos, addresses or communication data.

Definition

Salutation: Mr. Sex: male

Name: Doe

First Name: John

Name affix:

Identif. No.: ADM1 Title: -empty-

Allocated to: 1: Sample Company

Valid from: Valid to: Inactive: ☐

Addresses

Address Type	State	Street	Cntry	Code	Place
→ Main Address		123 Sample Street	GB	AA00 1BB	SMPL-PLACE
+ -select-			-select-		
+ -select-			-select-		

Communication

Communicat. Type	Number	Annotation
→ Standard Email Address	adm1@samplecompany.xyz	
→ Standard Phone Number	+00-123-456789	
+ -select-		
+ -select-		

(Figure 24: The screenshot may differ depending on the version)



Only after clicking the [**Save**] button on the top right, the entered data will be sent, checked and transferred to the database.



(Figure 25: The screenshot may differ depending on the version)



Notice:

The main administrator of each client is at the same time always a contact person of the client, which cannot be deleted! A client contact person is NOT automatically in the group of internal or external employees at the same time. If this should be desired, he must be created separately again in the respective person group.



2.4.5 Reference Values

Administration ► Client ► Reference Values

Go to the **[Create]** mode.



(Figure 26: The screenshot may differ depending on the version)

Work through and fill in all the individual categories. The lookup categories appear as selection fields in the corresponding input masks and are listed in the order in which they are assigned here (Position / Value).

Selection of the Look-up categories

Field: S. Voucher Type Language: English

Description: → "Invoice category of travel costs."

Display

Values in look-up table: "S. Voucher Type"

	Position	Value	VAT
↑	300	Air Ticket	%
↑	300	Bus / Railroad (over 50 km)	%
↑	300	Bus / Railroad (up to 50 km)	- %
↑	300	Hotel (incl. Board)	- %
↑	300	Hotel (without Board)	- %
↑	300	Oil / Repair	%
↑	300	Parking	%
↑	300	Phone / Fax / Internet	%
↑	300	Postage	0.00 %
↑	300	Refuel	%
↑	300	Rental Car	%
↓	300	Service / Mediation	%
	300	Servicevermittlung	%
↓	300	Taxi (over 50 km) / Long distance	0.00 %
↑	300	Taxi (up to 50 km)	- %
↑	390	Other	%

(Figure 27: The screenshot may differ depending on the version)

Only after clicking the **[Save]** button on the top right, the entered data will be sent, checked and transferred to the database.



(Figure 28: The screenshot may differ depending on the version)



2.4.6 Holidays

Administration ► Client ► Holidays

Go to the **[Create]** mode.



(Figure 29: The screenshot may differ depending on the version)

There you can define proposed holidays of the selected year by placing a checkmark in each desired checkbox. Additional holidays can be defined at the end of the list.

Holidays for the year - 2024 +

Day	Date	Holiday	Holiday Type
January 2024			
Mo	01/01/2024	New Year's Day	Full Day
February 2024			
We	02/14/2024	Ash Wednesday	Display Only
March 2024			
Fr	03/29/2024	Good Friday	Full Day
Su	03/31/2024	Easter Sunday	Full Day
April 2024			
Mo	04/01/2024	Easter Monday	Full Day
May 2024			
Mo	05/06/2024	May Day / Early May Bank Holiday	Full Day
We	05/08/2024	Liberation Day	Display Only
Su	05/19/2024	Pentecost - Whit Sunday	Display Only
Mo	05/20/2024	Pentecost - Whit Monday	Display Only
Mo	05/27/2024	Spring Bank Holiday / Late May Bank Holiday	Full Day
Th	05/30/2024	Corpus Christi	Display Only
August 2024			
Mo	08/26/2024	Summer Bank Holiday	Full Day
October 2024			
Th	10/31/2024	Reformation Day / Halloween	Half Day
December 2024			
Su	12/01/2024	1st Advent	

(Figure 30: The screenshot may differ depending on the version)



Only after clicking the [**Save**] button on the top right, the entered data will be sent, checked and transferred to the database.



(Figure 31: The screenshot may differ depending on the version)



Notice:

These holidays apply in principle to the entire client.



2.4.7 Profile Names

Administration ► Profile/Users ► Profile Names

User profile groups (= "profiles" for short) are group folders to which one or more users incl. program functions can be assigned.

Go to the **[Create]** mode.



(Figure 32: The screenshot may differ depending on the version)

Any number of profiles can be created there.

User profile groups

	Group Name	No.
<input checked="" type="checkbox"/>	00 Open Source	8x
<input checked="" type="checkbox"/>	01 Project Matrix + Skill Manager	3x
<input checked="" type="checkbox"/>	02 Project Extensions	4x
<input checked="" type="checkbox"/>	03 Time-Registration Extensions	7x
<input checked="" type="checkbox"/>	04 Travel Expenses	7x
<input checked="" type="checkbox"/>	05 Material	7x
<input checked="" type="checkbox"/>	06 DMS	7x
<input checked="" type="checkbox"/>	07 Invoicing	1x
<input checked="" type="checkbox"/>	08 Security	0x
<input checked="" type="checkbox"/>	99 Everything	2x

(Figure 33: The screenshot may differ depending on the version)

Only after clicking the **[Save]** button on the top right, the entered data will be sent, checked and transferred to the database.



(Figure 34: The screenshot may differ depending on the version)



2.4.8 Profile Program Assignment

Administration ► Profile/Users ► Profile Program Assignment

Under "**User Profile Groups**", select the appropriate profile names for which you want to assign programs, and then click "**Select**".

(Figure 35: The screenshot may differ depending on the version)

From a large amount of programs, the various available program functions can be assigned to the selected profile by ticking the checkboxes. Differentiated assignment of rights is possible, e.g. All / Display / Create / Change / Delete.

Program Name	00 Open Source	01 Project Matrix + Skill Manager	02 Project Extensions	03 Time-Registration Extensions	04 Travel Expenses	05 Material
Creation	11x	3x	4x	9x	12x	12x
<u>Client</u>						
Basic Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Person	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Customers</u>						
Basic Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Person	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Partners</u>						
Basic Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Person	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Employees</u>						
Basic Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contract Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roles	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Skills/Abilities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Annual Vacation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekly and Overtime Hours	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Contractors</u>						
Basic Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contract Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roles	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Skills/Abilities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekly and Overtime Hours	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Contacts</u>						
Basic Data	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Person	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Projects</u>						
Order Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create Main Project	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Materials</u>						
Material Definition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<u>Travel Allowances</u>						
Allowances: km/Non-monetary Remuneration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Allowances: Overnight Stay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<u>Planning</u>						
<u>Projects</u>						
Search						

(Figure 36: The screenshot may differ depending on the version)



Only after clicking the **[Save]** button on the top right, the entered data will be sent, checked and transferred to the database.



(Figure 37: The screenshot may differ depending on the version)

2.4.9 Employees - Basic Data

Creation ► Employees ► Basic Data

Go to the **[Create]** mode.



(Figure 38: The screenshot may differ depending on the version)

All employee data are created here, including photos, addresses and communication data.

Definition

Salutation: Mr. Sex: male

Name: Moore

First Name: Gerald

Name affix:

Identif. No.: GM

Department: B: Financial Department (2x)

Job Description: General Manager

Title: Dr.

Allocated to: 1: Sample Company

Valid from: Valid to: Inactive: ☐

Addresses

Address Type	State	Street	Cntry	Code	Place
→ Main Address		123 Sample Street	GB	AA00 1BB	SMPL-PLACE
+ -select-			-select-		
+ -select-			-select-		



Communication

Communicat.Type	Number	Annotation
→ Standard Email Address ▼	gm@samplecompany.xyz	
→ Standard Phone Number ▼	+0-123-456789	
+ -select- ▼		
+ -select- ▼		

(Figure 39: The screenshot may differ depending on the version)

Only after clicking the **[Save]** button on the top right, the entered data will be sent, checked and transferred to the database.



(Figure 40: The screenshot may differ depending on the version)



Notice:

When a new employee is created, standard additional employee data is also created automatically, but this can be changed later at any time in the additional data program function. Employee additional data are e.g. weekly working hours (40 h), weekly working days (Monday-Friday), employee entry date (first of the current month) etc.



2.4.10 User Definition

Administration ► Profile/Users ► User Definition

Create the employees as users incl. password assignment. Names in green in the "Corresponding Person" field means that at least one user is already assigned to this person.

Any number of users can be assigned to one person (n:1 relationship), but this is usually always a 1:1 relationship. On the other hand, only exactly one person can be assigned to a user at a time.

Go to the **[Create]** mode.



(Figure 41: The screenshot may differ depending on the version)

Here exactly one previously created profile (= user profile group) can be assigned to a user.

User Block

User Name: User-ID: 2

E-Mail-Address: Valid from: Valid to:

Administr.-Prg.: ☒ Password:

Corresp. Person: Repeat Password:

Costs:

(Figure 42: The screenshot may differ depending on the version)

Only after clicking the **[Save]** button on the top right, the entered data will be sent, checked and transferred to the database.



(Figure 43: The screenshot may differ depending on the version)



2.4.11 User Profile Assignment

Administration ► Profile/Users ► User Profile Assignment

If the user was not assigned to a user profile group during user definition, or if a user is to be assigned to several user profile groups, or if the membership of a user profile group is to be changed, this can be done with this program function.

There are two modes:

- **Group mode:**
One or more users can be assigned to a user profile group at the same time.
- **User mode:**
A user can be assigned to one or more user profile groups at the same time.

Selection Mask

User Profile Groups: 03 Project Worker

Display User Mode

Assignment Mask

User

Client - Contact Person

☐ Doe, John "ADM1" - [admin]*

Contract Partner - Contact Person

☒ Powell, Chris "PA-CP" - [pa-cp]

Contractor

☒ Tanner, Calvin "CT1" - [ct1]

☒ Tyler, Cindy "CT2" - [ct2]

Customer - Contact Person

☒ Paulson, Caroline "CA-CP" - [ca-cp]

Employee

☒ Lancaster, Phoebe "PL" - [pl]

☒ Maddox, Eric "EM1" - [em1]

☒ Mallard-Baker, Elizabeth "EM2" - [em2]

☒ Meyer, Paul "PM" - [pm]

☒ Moore, Gerald "GM" - [gm]*

☒ Owen, Pamela "PO" - [po]

☒ Palmer, R. "RP" - [rp] {inactive}

(Figure 44: The screenshot may differ depending on the version)



Only after clicking the **[Save]** button on the top right, the entered data will be sent, checked and transferred to the database.

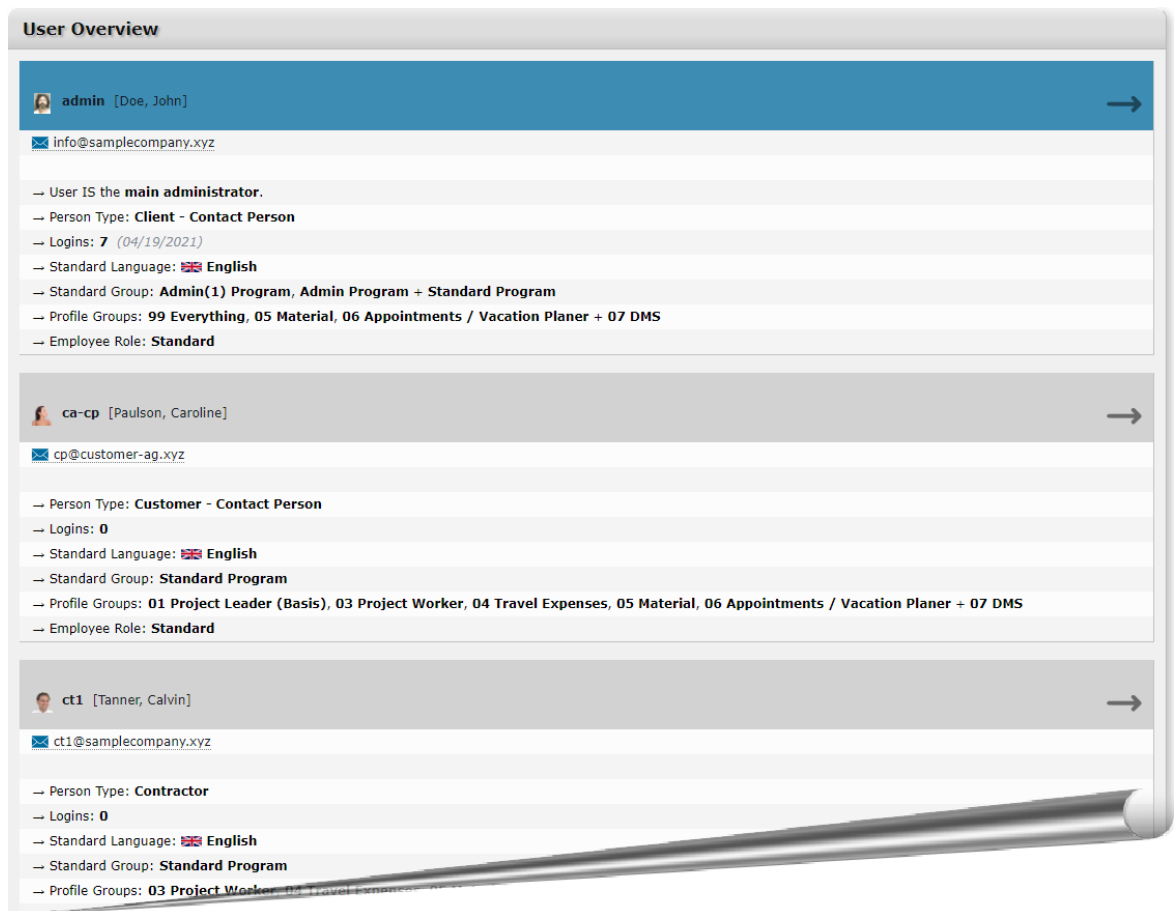


(Figure 45: The screenshot may differ depending on the version)

2.4.12 User Overview

Administration ► Profile/Users ► User Overview

In the user overview, important basic information is displayed for each individual user, e.g. person type, profile groups, roles, etc.



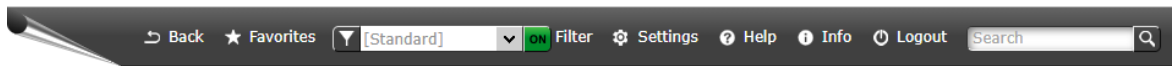
(Figure 46: The screenshot may differ depending on the version)

By clicking on the → "Arrow" on the right side of every user you can view detailed program rights for this user.



2.4.13 Logout Client X

With this, the basic data for successful work with fx-project is recorded.
Now perform a "Logout" in the current client.



(Figure 47: The screenshot may differ depending on the version)