



# **FX-PROJECT<sup>®</sup>**

OPEN SOURCE

Version 21

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## **fx-project Open Source - Workflow FIRST STEPS**



# Table of contents

<b>1</b>	<b>General.....</b>	<b>4</b>
1.1	Brief Description .....	4
1.2	Imprint.....	4
<b>2</b>	<b>Workflow: First Steps .....</b>	<b>5</b>
2.1	Login Client 1 .....	5
2.2	Workflow: Administrator 1.....	6
2.2.1	Client Settings 1 .....	6
2.2.2	Client 1 - Basic Data .....	8
2.2.3	Client 1 - Create New Client .....	10
2.2.4	Logout Client 1 .....	11
2.3	Login Client X.....	12
2.4	Workflow: Administrator X.....	12
2.4.1	Client Settings X.....	13
2.4.2	User Settings .....	14
2.4.3	Client X - Basic Data .....	15
2.4.4	Client X - Contact Person.....	17
2.4.5	Reference Values.....	19
2.4.6	Holidays .....	20
2.4.7	Profile Names .....	22
2.4.8	Profile Program Assignment.....	23
2.4.9	Employees - Basic Data .....	24
2.4.10	User Definition.....	26
2.4.11	User Profile Assignment.....	27
2.4.12	User Overview.....	28
2.4.13	Logout Client X.....	29
<b>3</b>	<b>Third-Party Software Notice .....</b>	<b>30</b>





## 1 General

fx-project version 21, as of June 2021

### 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**         **fx-project**

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: fx-project

**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/fox/` (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 leave requests for persons who have no leave request?	Yes
↑ Vacation requests for persons who have no leave request	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.

**Selection**

Client:

(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.

**Definition**

Client No.:  Name:

Name affix:

Identif. No.:

User Name:  Password:

E-Mail-Address:  Repeat Password:

(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.:	<input type="text" value="2"/>	Name:	<input type="text" value="Sample Company"/>
Name affix:	<input type="text"/>		
Identif. No.:	<input type="text"/>		
User Name:	<input type="text" value="admin"/>	Password:	<input type="password" value="....."/>
E-Mail-Address:	<input type="text" value="info@samplecompany.xyz"/>	Repeat Password:	<input type="password" value="....."/>

(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.

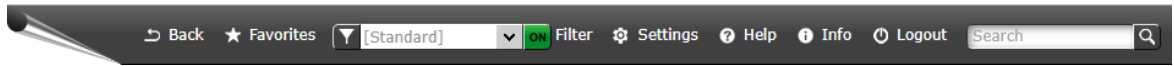


(Figure 11: The screenshot may differ depending on the version)



## 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. The title bar says 'User login'. There are three input fields: 'Client No.:' with the value '2', 'User Name:' with the value 'admin', and 'Password:' with the value 'fx-project'. Below the fields is a 'Login' button.

*(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.

The screenshot shows a 'Settings' dialog box with two main sections: 'Administration' and 'Appointments'. The 'Administration' section contains various settings such as 'Company currency' (set to €), 'Max. working hours per day' (10.00), and 'Person Unit 1: Person Day (PD) in Hours (Hrs.)' (8.00). The 'Appointments' section includes settings like 'Allow half vacation days or applications?' (Yes) and 'Are ext. workforces allowed to take leave days?' (No). Each setting has a corresponding input field or dropdown menu, and a question mark icon is visible to the right of each row.

Section	Setting	Value
Administration	Allow assigning of individual person rights also for int. and ext. employees?	No
	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
	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
	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
Value added tax rate	Value added tax rate 1: Standard rate (in percent)	20.00
	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 requests for persons who have...	Yes	
Vacation...	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**.

Section	Setting	Value
Appointments	Sort appointments in the control center by persons instead of date?	Yes
	Adjust field border color according to the filter settings?	Yes
Format/Design	Calendar Month: Change calendar month from day X on (1 <= X <= 30)	20
	Century change when smaller than ...	20
	Date format	mm/dd/yyyy
	Decimal separator	.
	Display time spans in decimal format?	No
	Post-decimal positions	2
	Time format	HH:nn
	General	Each filter setting can be switched on or off?
List entries per page (Display Mode)		15
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.

**Selection**

Client:

(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.

**Definition**

Client No.:  Name:

Name affix:

Identif. No.:

---

User Name:  Password:

E-Mail-Address:  Repeat Password:

(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:  Sex:

Name:


First Name:

Name affix:

Identif. No.:  Title:

Allocated to:

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:  Language:

Description: → "Invoice category of travel costs."

### 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** - 2021 +

Day	Date	Holiday	Holiday Type
<b>January 2021</b>			
Fr	01/01/2021	<input type="checkbox"/> New Year's Day	Full Day
<b>February 2021</b>			
We	02/17/2021	<input type="checkbox"/> Ash Wednesday	Display Only
<b>March 2021</b>			
We	03/17/2021	<input type="checkbox"/> St. Patrick's Day	Display Only
<b>April 2021</b>			
Fr	04/02/2021	<input type="checkbox"/> Good Friday	Full Day
Su	04/04/2021	<input type="checkbox"/> Easter Sunday	Full Day
Mo	04/05/2021	<input type="checkbox"/> Easter Monday	Full Day
<b>May 2021</b>			
Mo	05/03/2021	<input type="checkbox"/> May Day / Early May Bank Holiday	Full Day
Sa	05/08/2021	<input type="checkbox"/> Liberation Day	Display Only
Su	05/23/2021	<input type="checkbox"/> Pentecost - Whit Sunday	Display Only
<b>August 2021</b>			
Su	08/15/2021	<input type="checkbox"/> Ascension Day	Display Only
Mo	08/30/2021	<input type="checkbox"/> Summer Bank Holiday	Full Day
<b>October 2021</b>			
Su	10/31/2021	<input type="checkbox"/> Reformation Day / Halloween	Half Day
<b>November 2021</b>			
Su	11/28/2021	<input type="checkbox"/> 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 Groups		No.
	Group Name	
<input checked="" type="checkbox"/>	01 Project Leader (Basis)	4x
<input checked="" type="checkbox"/>	02 Project Leader (Professional)	2x
<input checked="" type="checkbox"/>	03 Project Worker	11x
<input checked="" type="checkbox"/>	04 Travel Expenses	11x
<input checked="" type="checkbox"/>	05 Material	12x
<input checked="" type="checkbox"/>	06 Appointments / Vacation Planer	12x
<input checked="" type="checkbox"/>	07 DMS	12x
<input checked="" type="checkbox"/>	08 Project Office	1x
<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.



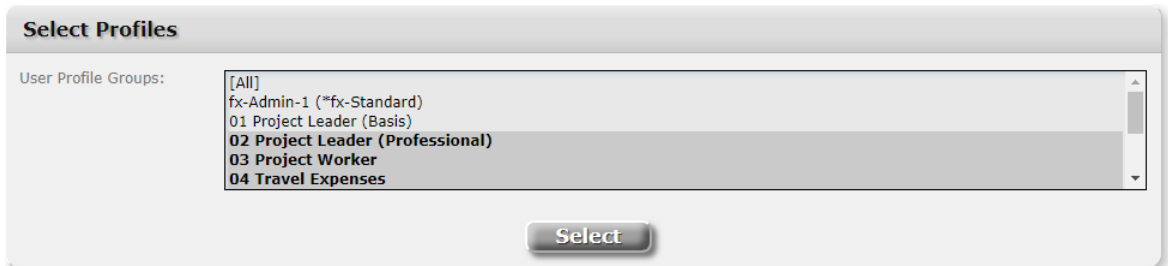
(Figure 34: The screenshot may differ depending on the version)



## 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	02 Project Leader (Professional)	03 Project Worker	04 Travel Expenses	05 Material	07 DMS	99 Everything
<b>Creation</b>	2x	11x	11x	12x	12x	2x
<b>Client</b>						
Basic Data	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Person	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Customers</b>						
Basic Data	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Person	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Partners</b>						
Basic Data	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Person	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Employees</b>						
Basic Data	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Data	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Roles	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Skills/Abilities	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Annual Vacation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Weekly and Overtime Hours	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Contractors</b>						
Basic Data	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Data	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Roles	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Skills/Abilities	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Weekly and Overtime Hours	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Contacts</b>						
Basic Data	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Person	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Projects</b>						
Order Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Create Main Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Copy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Materials</b>						
Material Definition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Travel Allowances</b>						
Allowances: km/Non-monetary Remuneration	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Allowances: Overnight Stay	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Planning</b>						
<b>Projects</b>						
Search						
Matrix: Graphical						

(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:  Sex:

Name:


First Name:  Department:

Name affix:  Job Description:

Identif. No.:  Title:

Allocated to:

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.

<b>User Block</b>			
User Name:	<input type="text" value="gm"/>	User-ID:	2
E-Mail-Address:	<input type="text" value="gm@samplecompany.xyz"/>	Valid from:	<input type="text"/>
Administr.-Prg.:	<input checked="" type="checkbox"/>	Valid to:	<input type="text"/>
Corresp. Person:	<input type="text" value="Moore, Gerald 'GM' - [gm]* (01/01/2021)"/>	Password:	<input type="password" value="....."/>
Costs:	<input type="text" value="User can see ALL costs"/>	Repeat Password:	<input type="password" value="....."/>

(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.

**User Overview**

**admin [Doe, John]** →  
info@samplecompany.xyz

- User IS the **main administrator**.
- Person Type: **Client - Contact Person**
- Logins: **7** (04/19/2021)
- Standard Language: **English**
- Standard Group: **Admin(1) Program, Admin Program + Standard Program**
- Profile Groups: **99 Everything, 05 Material, 06 Appointments / Vacation Planer + 07 DMS**
- Employee Role: **Standard**

**ca-cp [Paulson, Caroline]** →  
cp@customer-ag.xyz

- Person Type: **Customer - Contact Person**
- Logins: **0**
- Standard Language: **English**
- Standard Group: **Standard Program**
- Profile Groups: **01 Project Leader (Basis), 03 Project Worker, 04 Travel Expenses, 05 Material, 06 Appointments / Vacation Planer + 07 DMS**
- Employee Role: **Standard**

**ct1 [Tanner, Calvin]** →  
ct1@samplecompany.xyz

- Person Type: **Contractor**
- Logins: **0**
- Standard Language: **English**
- Standard Group: **Standard Program**
- Profile Groups: **03 Project Worker, 04 Travel Expenses, 05 Material, 06 Appointments / Vacation Planer + 07 DMS**
- Employee Role: **Standard**

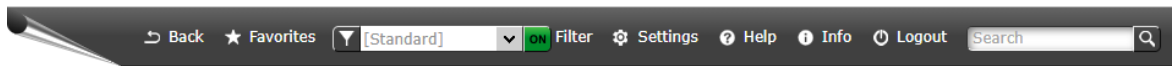
(Figure 46: The screenshot may differ depending on the version)

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)*



### 3 Third-Party Software Notice

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