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3.11.08 Unit Administration

In Projectile, the department structures can be illustrated in a company by using “units”. There can be one or more unit managers and an associated team. With the possibility to divide the employees into various units, i.e. departments, extensions and refinement of the access permissions system occurs. This is important when units are assigned to [projects](#).

The screenshot shows the 'Unit 001 Bayern' administration window. The fields and their values are as follows:

- Unit:** 001 Bayern
- TopUnit:** 001 Bayern
- Bezeichnung:** 001 Bayern
- Unitleiter:** Search results show 'Frenzel Thomas'.
- Mitarbeiter:** Search results show 'Abel Klaus'.
- Übergeordnete Unit:** (Empty)
- Untergeordnete Unit:** Search results show '010 Nürnberg' and '011 München'.
- Bemerkung:** (Empty)

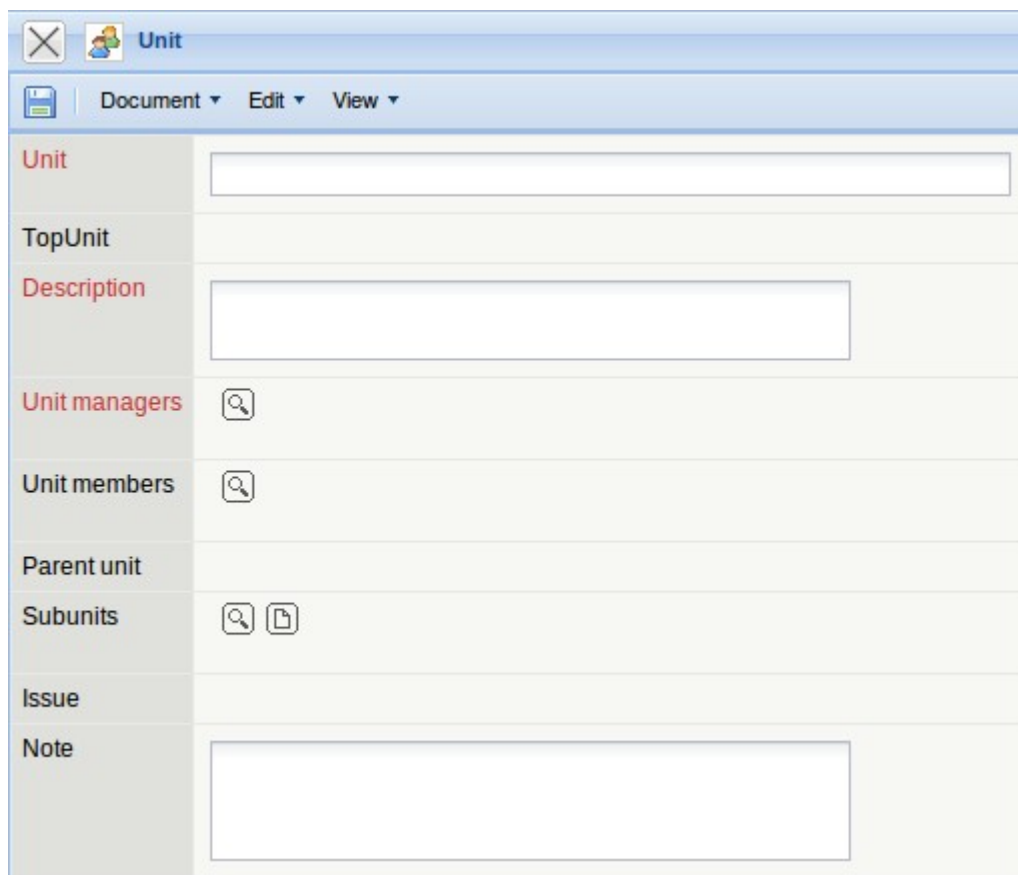
Required fields: Unit, Description, Unit manager

Defining New Units

In the following units a new unit is created. First, the functionality “Create” with the selections “Unit” is activated.



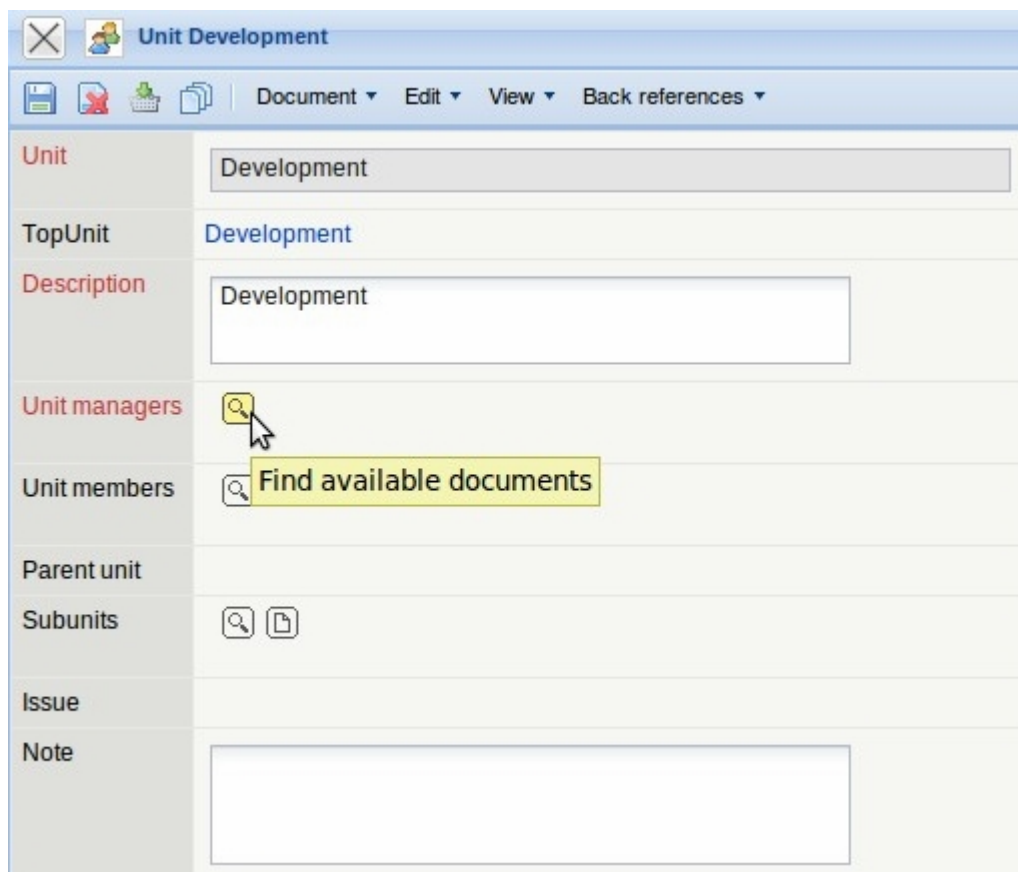
Then, a new document is opened:



The screenshot shows a web application window titled 'Unit'. The window has a menu bar with 'Document', 'Edit', and 'View'. The form contains the following fields:

Unit	
TopUnit	
Description	
Unit managers	
Unit members	
Parent unit	
Subunits	
Issue	
Note	

In the following example a new unit “Department” with two sub-units is defined. To define the unit manager, using the functionality “Find available documents” ...



The screenshot shows a web application window titled 'Unit Development'. The window has a menu bar with 'Document', 'Edit', 'View', and 'Back references'. The form contains the following fields:

Unit	Development
TopUnit	Development
Description	Development
Unit managers	
Unit members	
Parent unit	
Subunits	
Issue	
Note	

A yellow tooltip with the text 'Find available documents' is visible over the 'Unit members' field.

Unit: Sales

Bezeichnung: Marketing & Vertrieb

Unitleiter: [dropdown arrow]

Mitarbeiter: [dropdown arrow] alle verfügbaren Dokumente

Übergeordnete Unit: [empty]

Untergeordnete Unit: [dropdown arrow]

Bemerkung: [text area]

... with the appropriate list of all employees is displayed. Here, the employee can be selected and included ...

Current selection: Unit managers

Toggle filter

Hint: It is also possible to click on entries to include them

Include selection

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	Name	First name
☐	1 Belsito	Marina
☒	2 Conner	Jane
☐	3 Griffith	Jean
☐	4 Hahn	Katrina
☐	5 Jones	Timothy
☐	6 Müller	Georg
☐	7 Tate	Adam

... to be assigned as the unit manager in the unit. The employees are selected for this unit ...

Unit Development

Document Edit View Back references

Unit Development

TopUnit Development

Description Development

Unit managers
☐ Conner Jane

Unit members

Parent unit Find available documents

Subunits

Issue

Note

and then assigned to the unit, in the same manner as above.

Current selection: Unit members

Toggle filter

Hint: It is also possible to click on entries to include them

Include selection

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	Name	First name
☐	1 Belsito	Marina
☐	2 Conner	Jane
☒	3 Griffith	Jean
☐	4 Hahn	Katrina
☒	5 Jones	Timothy
☒	6 Müller	Georg
☒	7 Tate	Adam

After all information is entered, the document is then saved using

It is possible to create sub-units for this unit “Department”. To create the sub-unit, activate the functionality “New Document” in the sub-unit row.

Unit Development

Document Edit View Back references

Unit

Development

TopUnit

Development

Description

Development

Unit managers

☐ [4] Jane Conner

Unit members

☐ [4] Griffith Jean

☐ [4] Jones Timothy

☐ [3] Müller Georg

☐ [4] Tate Adam

Parent unit

Subunits

New document

Issue

Note

A new unit manager must be entered once again.

Es muss wieder ein Unitleiter angegeben werden.

The screenshot shows the 'Unit Administration' window with the following fields and values:

- Unit:** Marketing
- Bezeichnung:** Marketing & Öffentlichkeitsarbeit
- Unitleiter:** (Icon: person with magnifying glass)
 alle verfügbaren Dokumente (tooltip)
- Mitarbeiter:** (Icon: person with magnifying glass)
- Übergeordnete Unit:** Sales
- Untergeordnete Unit:** (Icon: magnifying glass, icon: document)
- Bemerkung:** (Empty text area)

Nach Definition dieser untergeordneten Unit "Marketing", wird ...

The screenshot shows the 'Unit Administration' window with the following fields and values:

- Unit:** Marketing (dropdown menu open, showing 'Neues Dokument aus Vorlage')
- Bezeichnung:** Marketing & Öffentlichkeitsarbeit
- Unitleiter:** (Icon: person with magnifying glass)
 ☐ [1] Krause Sabine
- Mitarbeiter:** (Icon: person with magnifying glass)
 ☐ [1] Müller Julia
 ☐ [2] Möller Frauke
 ☐ [3] Tolker Jan
- Übergeordnete Unit:** Sales
- Untergeordnete Unit:** (Icon: magnifying glass, icon: document)
- Bemerkung:** (Empty text area)

... eine zweite Unit "Vertrieb" erstellt.

The screenshot shows a web-based form titled 'Unit Vertrieb'. The form has a blue header bar with navigation icons and a dropdown menu set to 'Unit Vertrieb'. Below the header is a toolbar with icons for document operations. The form fields are as follows:

- Unit:** A label with a tooltip that says 'Dokument speichern'.
- Bezeichnung:** A text input field containing 'Vertrieb, Messen & Roadshows'.
- Unitleiter:** A section with a list of icons and a checkbox next to a user icon labeled '[1] Lange Wolf'.
- Mitarbeiter:** A section with a list of icons and a list of names: '[1] Franke Helene [2] Müller Frank [3] Rainert Thorsten'.
- Übergeordnete Unit:** A text input field containing 'Sales'.
- Untergeordnete Unit:** A section with two search icons.
- Bemerkung:** A large text area for notes.

Nach dem Schließen der beiden untergeordneten Units ergibt sich folgende Organisationsstruktur. Die Unit "Sales" besteht aus den zwei untergeordneten Abteilungen "Marketing" und "Vertrieb".

Unit	Sales
Bezeichnung	Marketing & Vertrieb
Unitleiter	[1] Krause Sabine [2] Lange Wolf
Mitarbeiter	[1] Müller Julia [2] Möller Frauke [3] Rainert Thorsten [4] Schiefer Claudia
Übergeordnete Unit	
Untergeordnete Unit	[1] Marketing [2] Vertrieb
Bemerkung	

Für die definierte Unit "Sales" ergibt sich dann folgende Struktur:

Suchergebnis			
01 - ReportMaker			
Name: 26.09.2005 18:37:18			
gefunden: 1 - 26 / 26			
☒		Typ	Status
1	☐ Sales	Unit	
2	☐ Unitleiter	Unitleiter	
3	☐ Krause Sabine	Mitarbeiter	Krause Sabine
4	☐ Lange Wolf	Mitarbeiter	Lange Wolf
5	☐ Mitarbeiter	Mitarbeiter	
6	☐ Müller Julia	Mitarbeiter	Müller Julia
7	☐ Möller Frauke	Mitarbeiter	Möller Frauke
8	☐ Rainert Thorsten	Mitarbeiter	Rainert Thorsten
9	☐ Schiefer Claudia	Mitarbeiter	Schiefer Claudia
10	☐ Untergeordnete Unit	Untergeordnete Unit	
11	☐ Marketing	Unit	Marketing
12	☐ Unitleiter	Unitleiter	
13	☐ Krause Sabine	Mitarbeiter	Krause Sabine
14	☐ Mitarbeiter	Mitarbeiter	
15	☐ Müller Julia	Mitarbeiter	Müller Julia
16	☐ Möller Frauke	Mitarbeiter	Möller Frauke
17	☐ Tolker Jan	Mitarbeiter	Tolker Jan
18	☐ Übergeordnete Unit	Übergeordnete Unit	
19	☐ Vertrieb	Unit	Vertrieb
20	☐ Unitleiter	Unitleiter	
21	☐ Lange Wolf	Mitarbeiter	Lange Wolf
22	☐ Mitarbeiter	Mitarbeiter	
23	☐ Franke Helene	Mitarbeiter	Franke Helene
24	☐ Müller Frank	Mitarbeiter	Müller Frank
25	☐ Rainert Thorsten	Mitarbeiter	Rainert Thorsten
26	☐ Übergeordnete Unit	Übergeordnete Unit	

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