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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.



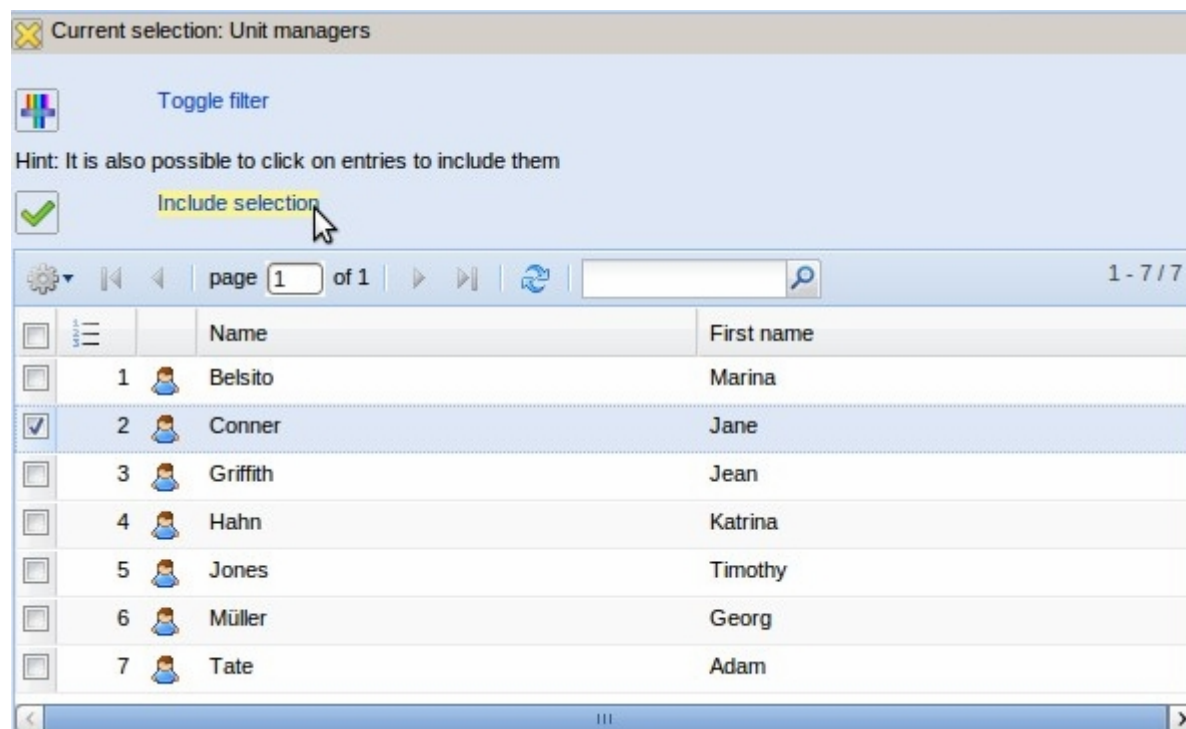
Then, a new document is opened:

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

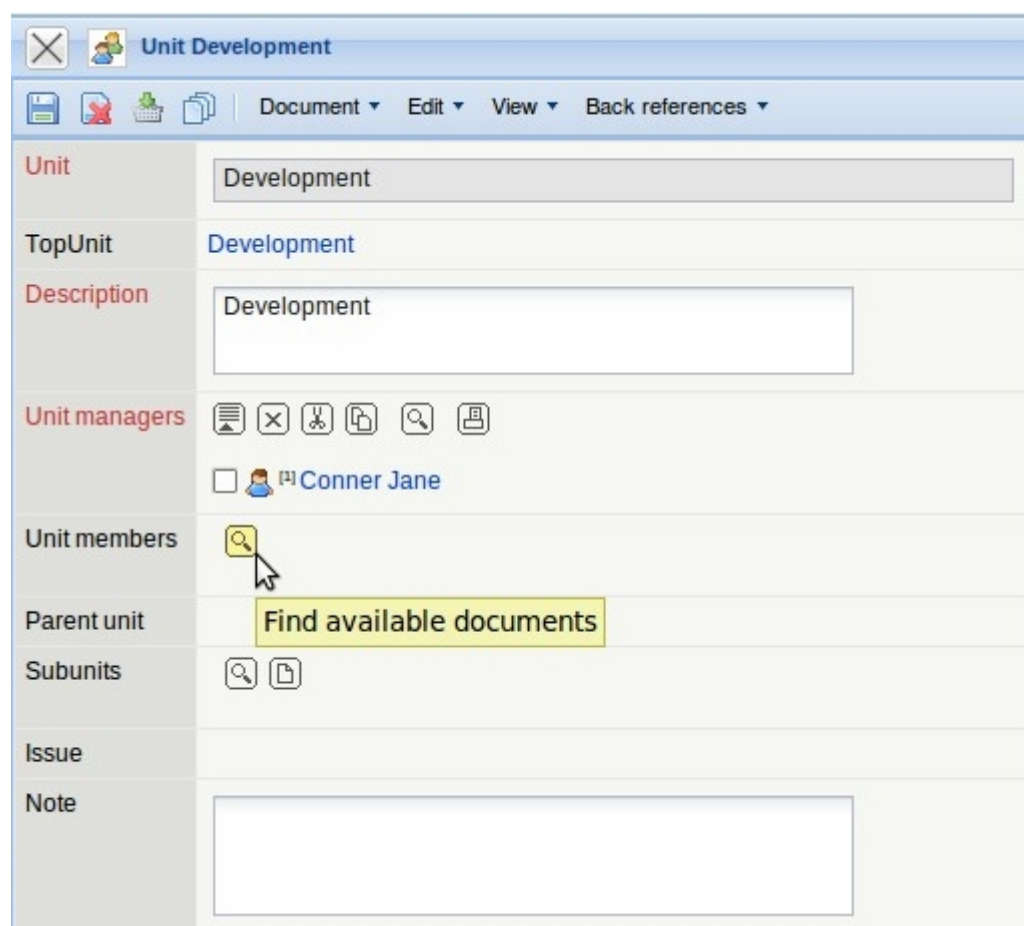
In the following example a new unit “Department” with two sub-units is defined. To define the unit manager, using the functionality “Find available documents” ...

Unit Development	
Unit	Development
TopUnit	Development
Description	Development
Unit managers	
Unit members	Find available documents
Parent unit	
Subunits	
Issue	
Note	

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



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



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

page 1 of 1

	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 

Unit Development

    Document Edit View Back references

Unit Save the document

TopUnit Development

Description Development

Unit managers      

☐  Jane Conner

Unit members       

☐  Griffith Jean

☐  Jones Timothy

☐  Müller Georg

☐  Tate Adam

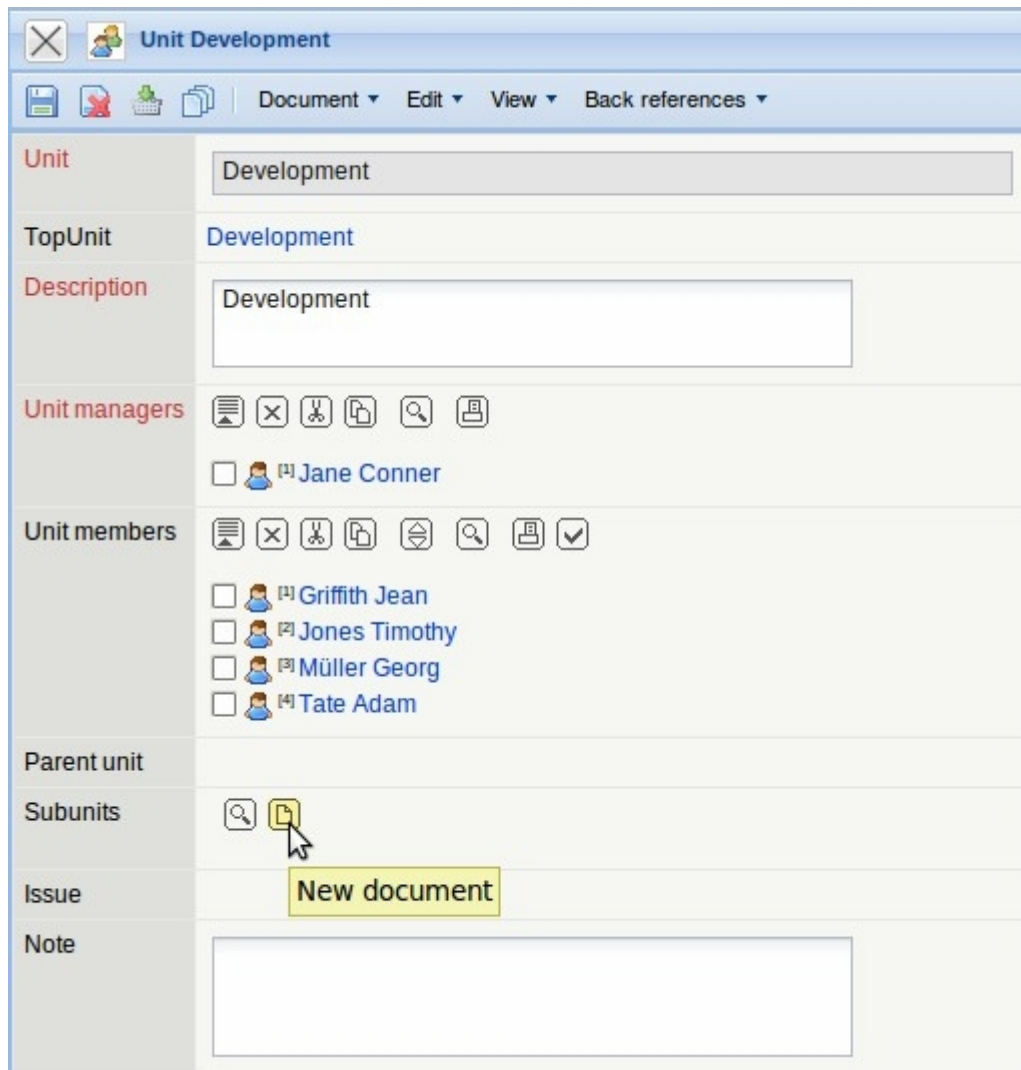
Parent unit

Subunits  

Issue

Note

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.



The screenshot shows a web application window titled "Unit Development". The window has a menu bar with "Document", "Edit", "View", and "Back references". The main content area is divided into several sections:

- Unit:** A text field containing "Development".
- TopUnit:** A text field containing "Development".
- Description:** A text field containing "Development".
- Unit managers:** A section with a toolbar (list, delete, add, search, save) and a list of managers. One manager, "Jane Conner", is listed with a checkbox.
- Unit members:** A section with a toolbar (list, delete, add, search, save, check) and a list of members. Four members are listed: "Griffith Jean", "Jones Timothy", "Müller Georg", and "Tate Adam", each with a checkbox.
- Parent unit:** A text field.
- Subunits:** A section with a toolbar (list, add) and a "New document" button highlighted with a yellow box.
- Issue:** A text field.
- Note:** A text field.

A new unit manager must be entered once again.

Es muss wieder ein Unitleiter angegeben werden.

The screenshot shows a web application interface for managing units. The top toolbar includes icons for back, forward, search, and other navigation functions. The main form has the following fields:

- Unit:** A text input field containing "Marketing".
- Bezeichnung:** A text input field containing "Marketing & Öffentlichkeitsarbeit".
- Unitleiter:** A field with a search icon and a tooltip that says "alle verfügbaren Dokumente".
- Mitarbeiter:** A field with a search icon.
- Übergeordnete Unit:** A field containing the text "Sales".
- Untergeordnete Unit:** A field with a search icon and a document icon.
- Bemerkung:** A large text area for notes.

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

Unit Marketing

Neues Dokument aus Vorlage

Bezeichnung Marketing & Öffentlichkeitsarbeit

Unitleiter ☐ [1] Krause Sabine

Mitarbeiter ☐ [1] Müller Julia
☐ [2] Möller Frauke
☐ [3] Tolker Jan

Übergeordnete Unit Sales

Untergeordnete Unit

Bemerkung

... eine zweite Unit "Vertrieb" erstellt.

Unit Vertrieb

Unit Dokument speichern

Bezeichnung Vertrieb, Messen & Roadshows

Unitleiter ☐ [1] Lange Wolf

Mitarbeiter ☐ [1] Franke Helene [2] Müller Frank [3] Rainert Thorsten

Übergeordnete Unit Sales

Untergeordnete Unit ☐ ☐

Bemerkung

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

Unit Sales

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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Last update: 2019/10/25 14:09

