

[previous](#) [Home](#) [next](#)

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](#).

Unit	Marketing and Sales
TopUnit	Cambridge
Description	Marketing and Sales
Unit managers	☐ Müller Georg
Unit members	☐ Jones Timothy ☐ Griffith Jean
Parent unit	Cambridge
Subunits	
Issue	
Note	

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.



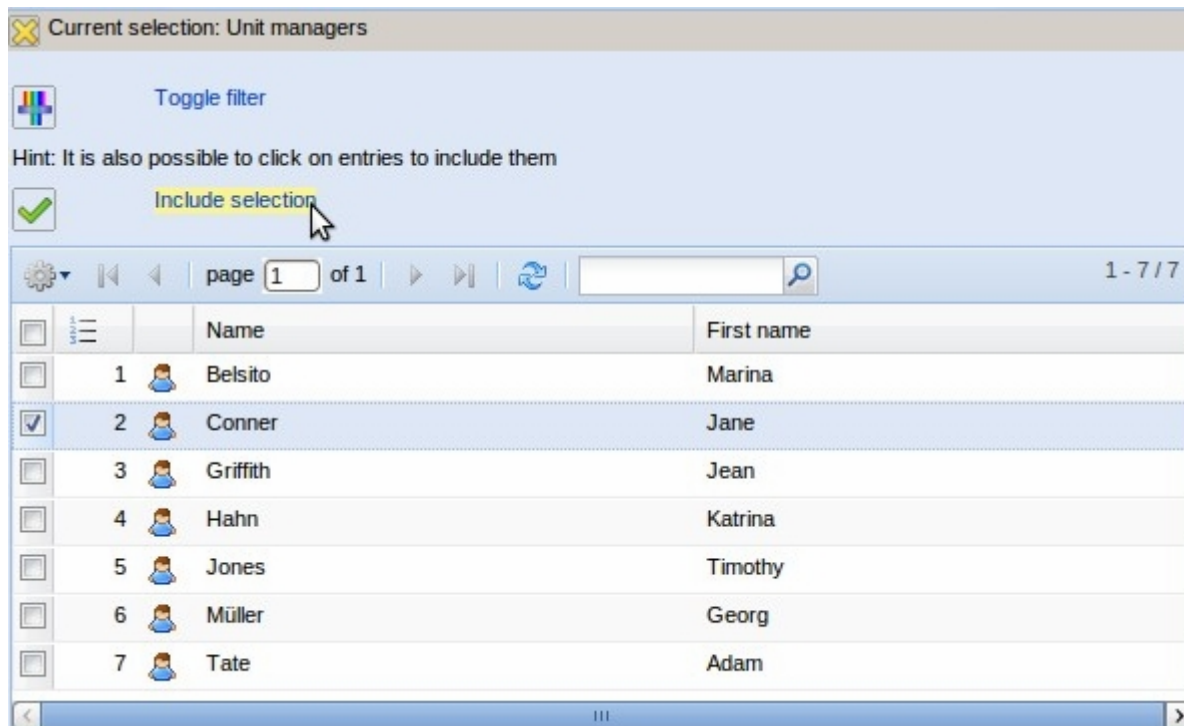
Then, a new document is opened:

Unit	
Document Edit View	
Unit	
TopUnit	
Description	
Unit managers	
Unit members	
Parent unit	
Subunits	
Issue	
Note	

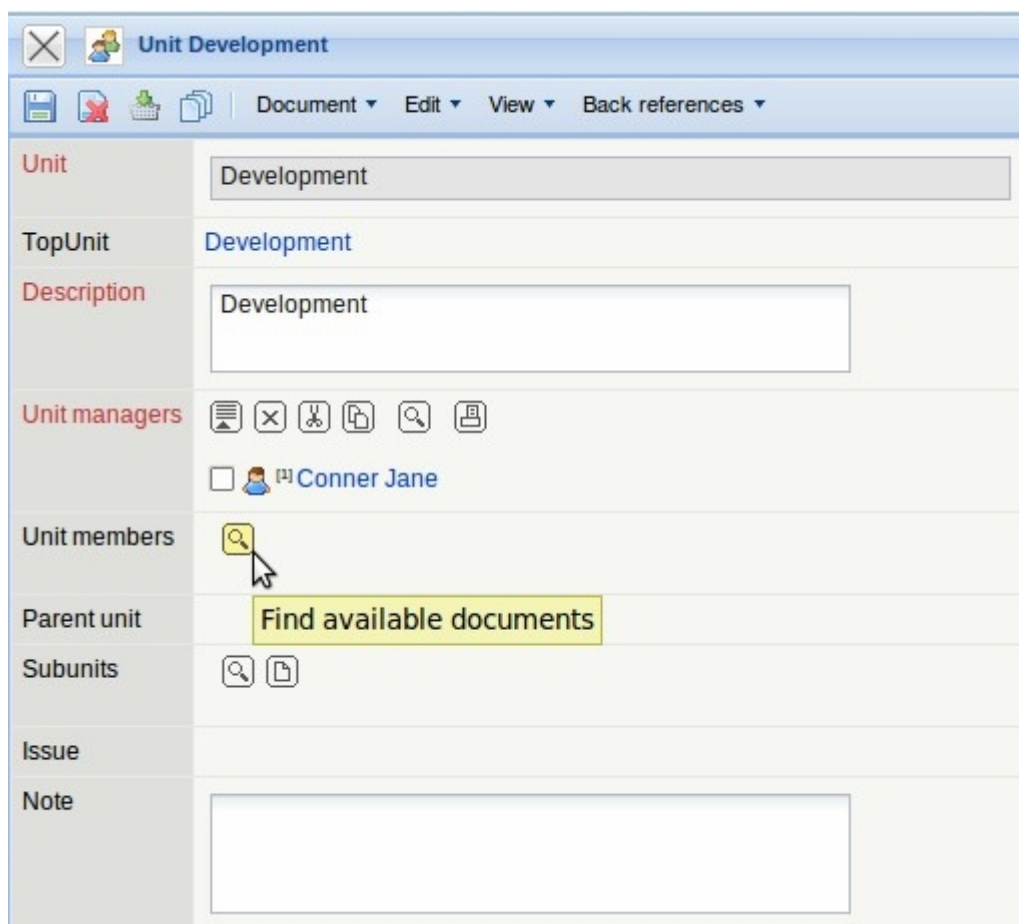
In the following example a new unit “Department” with two sub-units is defined. To define the unit manager, using the functionality “Find available documents” ...

Unit Development	
Document Edit View Back references	
Unit	Development
TopUnit	Development
Description	
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

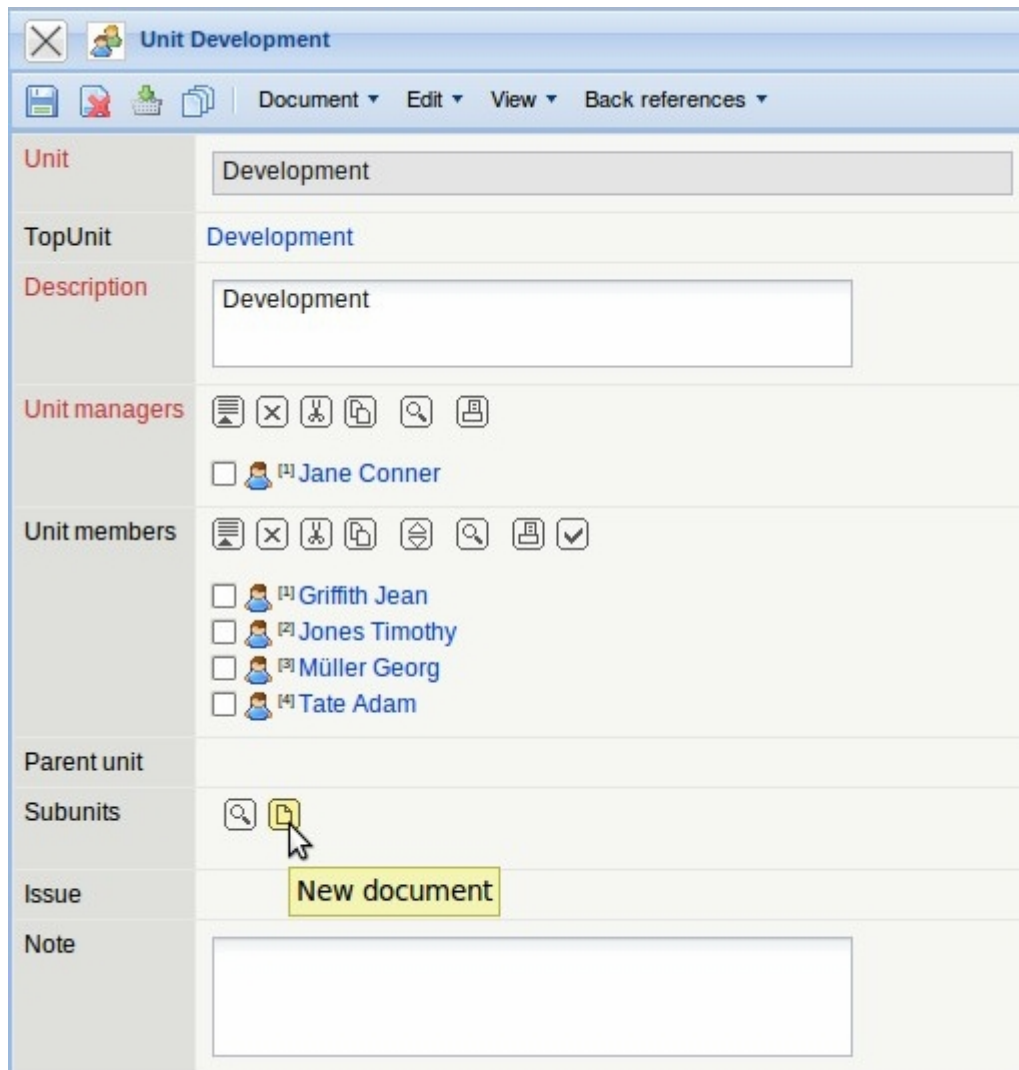
Parent unit

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 checkbox next to a user icon and the name "Jane Conner".
- Unit members:** A section with a toolbar (list, delete, add, search, save, check) and a list of four users with checkboxes: "Griffith Jean", "Jones Timothy", "Müller Georg", and "Tate Adam".
- Parent unit:** A text field.
- Subunits:** A section with a toolbar (list, add) and a yellow button labeled "New document" which is highlighted by a mouse cursor.
- Issue:** A text field.
- Note:** A text field.

A new unit manager must be entered once again.

Es muss wieder ein Unitleiter angegeben werden.

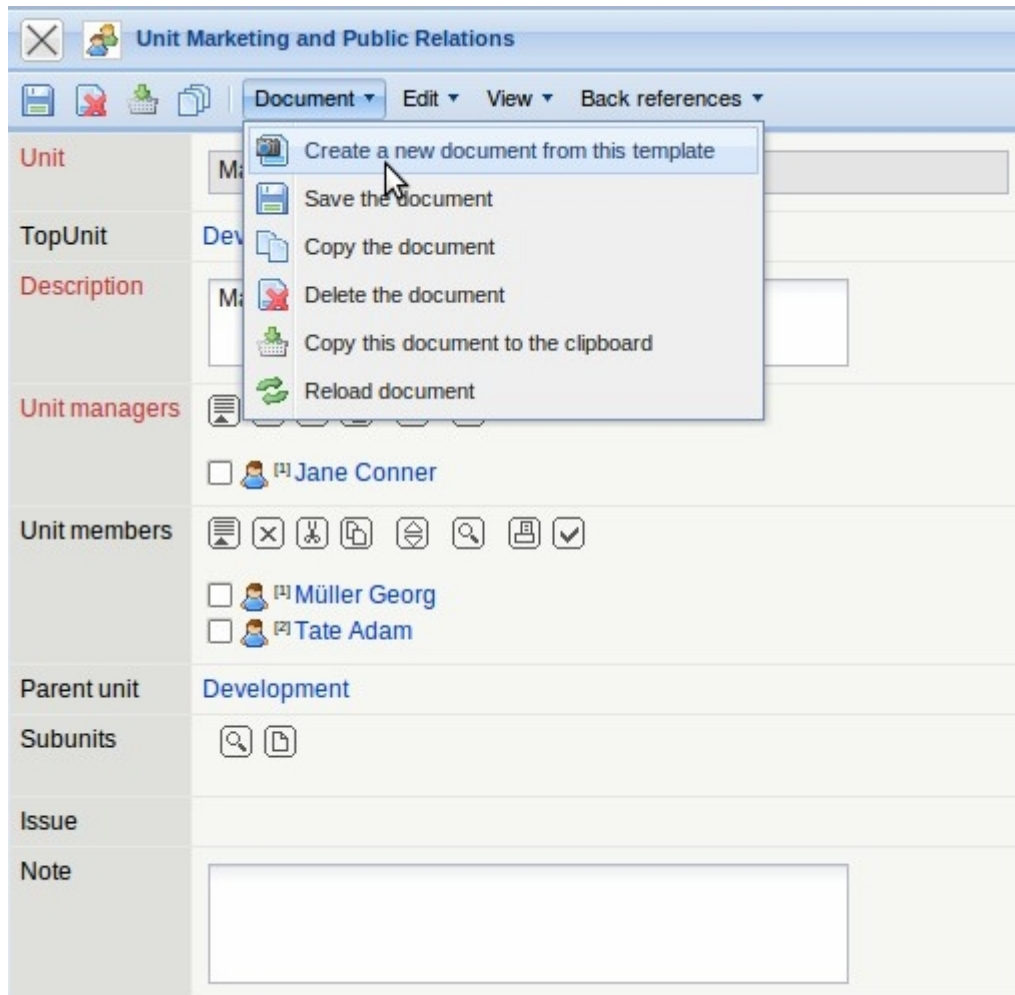
Unit

Document Edit View

Unit	Marketing 1.1
TopUnit	
Description	Marketing and Public Relations
Unit managers	
Unit members	 Find available documents
Parent unit	Development
Subunits	 
Issue	
Note	

After defining this sub-unit “Marketing and Sales”,

Nach Definition dieser untergeordneten Unit “Marketing”, wird ...



... a second unit "Sales" is created.



Unit Marketing and Public Relations


Document ▾ Edit ▾ View ▾

Unit Save the document .1

TopUnit	Development
Description	Sales, Exhibitions and Roadshows
Unit managers	      ☐  ^[1] Griffith Jean
Unit members	       ☒ ☐  ^[1] Conner Jane ☐  ^[2] Griffith Jean
Parent unit	Development
Subunits	 
Issue	
Note	

After saving both sub-units, the following organisation structure is displayed. The unit “Development” consists of the two sub-departments “Marketing and “Sales”.

 Unit Development

 Document ▾ Edit ▾ View ▾ Back references ▾

Unit	Development
TopUnit	Development
Description	Development
Unit managers	 ☐  ^[1] Conner Jane
Unit members	 ☐  ^[1] Griffith Jean ☐  ^[2] Jones Timothy ☐  ^[3] Müller Georg ☐  ^[4] Tate Adam
Parent unit	
Subunits	 ☐  ^[1] Marketing and Public Relations ☐  ^[2] Sales, Exhibitions and Roadshows
Issue	
Note	

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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