Projects Table

This table holds records for project management activities. In the Standard System Demo, it is currently optimized for companies that provide consulting services to their clients. The system allows these companies to manage their billable and unbillable hours, work authorizations, and overall project status. It also accommodates internal project management.

Use Case

Members of the admin or Project Manager groups can manually create Project records. Projects can only be created in the Planned, Assigned, Work in Progress, and Awaiting Customer Feedback states.

Only members of the Project Manager and admin groups can edit the Project records of others, but the Sales and Support Staff (Base ServiceDesk group) can view their own Project records. The user who created the Project is automatically set as the Project Manager. The Project Manager receives email notifications pertaining to the Project's status, such as when all tasks are completed or the authorized hours spent on a project have been exceeded. The Project CCs field allows other users to receive notifications when the Project is completed. The information on the Contact Information tab gets filled out with the information of the Project Manager's Manager, and is provided through the Employee record of the Project Manager.

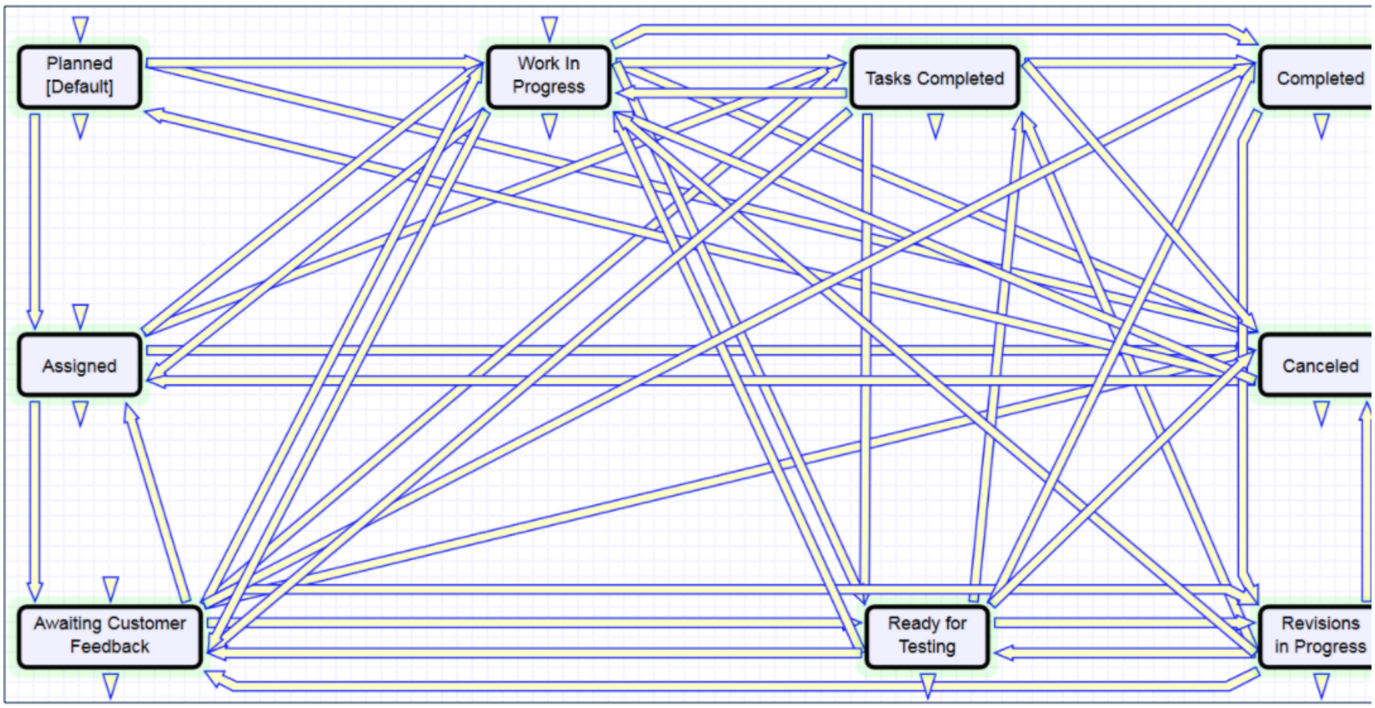
Project records are divided into two broad categories:

- Internal
- Client-Related. Additional fields are visible when a Project's Category is Client-Related. These fields hold information about customer contracts, contact details, and authorized hours.

These categories are further divided by type. The tasks that are automatically generated by a project depend on the type selected. For each Project type, there are task workflows or predefined user-selected task templates, which results in the automatic generation of certain tasks. The exact selection of these automatically generated tasks can be specified on the Tasks tab of the Project record. Ad-hoc tasks are created using an action button on the Tasks tab, as well.

The time spent on the project is tracked on the Time / Billing tab. It includes a small form to enter time spent, as well as a related table of Time Entry records for this project. Time entries can be searched for in the related table and linked to the project manually.

Workflow



Automation

In the Standard System Demo, the Projects table contains four active rules. These rules are accessed by expanding the Projects table in the left pane, selecting Setup Projects, and then selecting the Rules tab:

- **Create: All Project creation actions**: This rule runs whenever a new Project record is created by a user, via an email or by another rule in the system. It uses an If-Then-Else action called "I: all project create actions" to send emails to Project cc's and the Project Manager regarding the new project assignment if the creator of the record is not Project Manager assigned to it.

- **Edit by Web or API: Handle completion or addition of tasks and status changes - if tasks are done, mark as completed, if new task added, set to in progress**: This rule uses a saved search to run whenever the Project record is edited. It fetches all the records in which the number of tasks is greater than one and the number of open tasks changed in the last modification. It uses an If-Then-Else action called "I: Handle completion or adding tasks" to update the status of the project record and to send emails to Project Manager and Project CCs. It sets the status of a Project record to Tasks Completed when the number of open tasks is zero and status is changed to Work in Progress. It also changes the status to Work in Progress if the number of open tasks changed from zero to greater than zero when the status is Tasks Completed.
- **TB Demo Data Update: Update date fields by one month each month so reports have data**: This is a time-based rule that runs only on demo records in the system to ensure that demo reports have data. It updates relevant dates of these records by one month and deletes the history entries created by this rule.
- **Edit by Web: All edit actions: cancel tasks when project is cancelled etc.:** This rule runs whenever an existing Project record is edited by a user in the system. This rule uses two If-Then-Else actions called "I: All Edit Validations" and "'I: All edit actions". The first action shows a validation error message when a user attempts to change a record's status to Tasks Completed or Completed when the open task(s) exist on the record. The second action updates status of linked task records to Not Needed and sends an email notification to Project ccs and Project Manager when a user changes the status of the project record to Canceled. It also removes Project Id from All Project Ids field in the task template table through a linked record action if the status of the project record gets changed to Completed and project task generation method is 'User Select Tasks'.

Ownership

Records in this table are owned by the employee designated as the Project Manager.