Replicon Quick Start Guide
Adding a Project

This guide provides a visual overview of the steps involved in creating a new project in Replicon. Refer to Replicon's online help for more information on any of these steps.

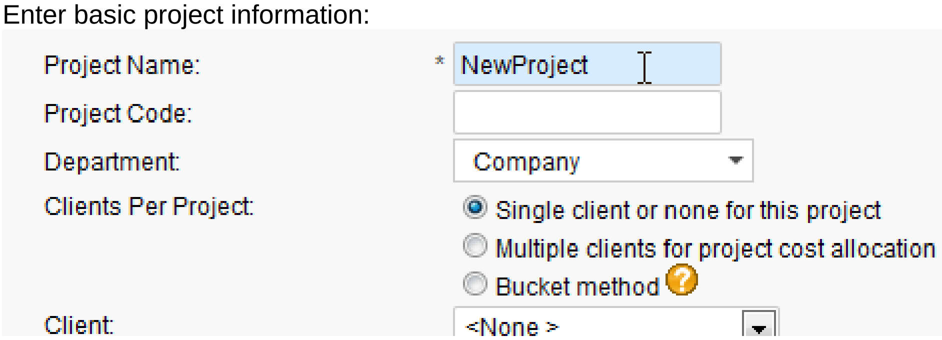
The project feature is only available to those with a Replicon Project & Billing license seat, who have been granted Projects permissions.

To add a project:

A. Create the Project

Open the **Add New Project** page:

Enter basic project information:



Use the* Based On *field if you want to copy details from an existing project
The project structure, project team, billing rates (excluding the project rate), task assignments, allowed expenses, and most advanced information will be copied.

The following fields may be available to you:

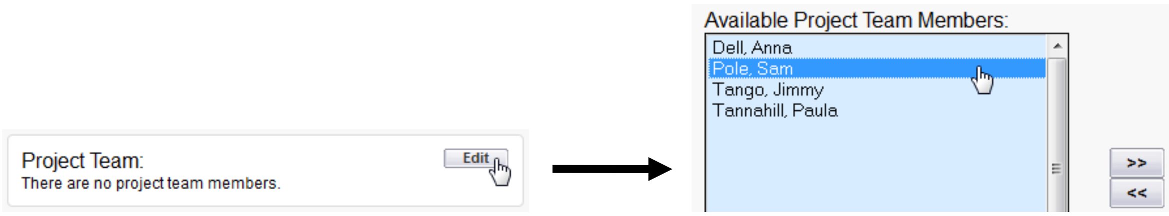
Department	Allows you to specify which department the project is visible to; you can add additional departments later. This field is only available if hierarchy filtering is enabled in your system.
Clients Per Project	Allows you to bill the project to multiple clients. There are two options: **Multiple clients for project cost allocation** lets you assign a percentage of costs to each client; **Bucket method** lets the user choose which client should be billed when they enter hours against the project in their timesheet.

B. Assign the project team

The project team consists of all users who can enter time against the project.

Assigning *<All>* to the project team allows all users in the system to enter time against the project; Assigning a department to the project team allows all users in that department to enter time against the project.

To assign the project team, on the **Project:** page:



C. Set up the project billing rates

TIMEBILL

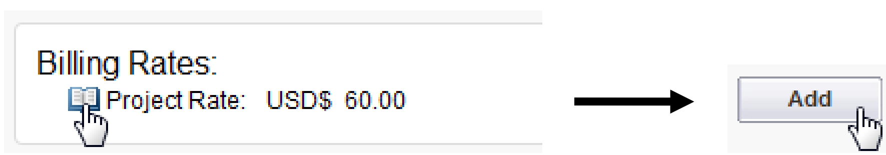
Project billing rates are only available if **Use billing information** is enabled in **System Preferences**.

There are three types of rates that can be associated with a project team member: project rates, role rates, and user/department rates.

Project rate

The current project rate is the default rate assigned to all team members. You added the initial project rate in step A above.

To change the project rate:



You can also edit existing project rates by selecting the icon.

Only one project rate can be in effect at a time. The first rate enabled for each rate type is the *Initial Rate*; any additional rates you add will take effect as of the effective date you assign.

When new project rates take effect, the project rate will update for all team members who are assigned a project rate.

Role rate

Roles are used to identify specific job functions or types of work. Each role is associated with a role rate. Roles are defined at the system-level, and can be "allowed" for use within each project.

To create a role:

To allow roles and their rates for use in a project, on the **Project:** page:

User/ Department rate

User/department rates apply to specific users and departments.

To assign user/department rates:

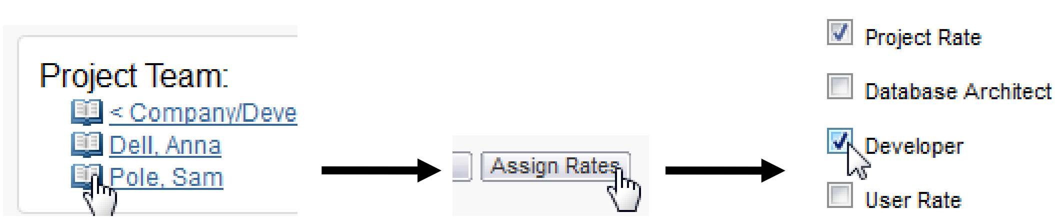
You can also edit existing user/department rates by selecting the icon.

Only one user/department rate can be effective at a time for each user. The first rate enabled for each rate type is the *Initial Rate*; any additional rates you add will take effect as of the effective date you assign.

> When you add a user rate, the user's default billing rate (assigned in their user profile) populates the rate field, although this value can be changed.

You can assign multiple types of rates to a user; if you assign multiple rates, the user will have to select which rate to use when entering time in their timesheet.

Of all the rate types available for a user, you can specify which should be available to the user in their timesheet:

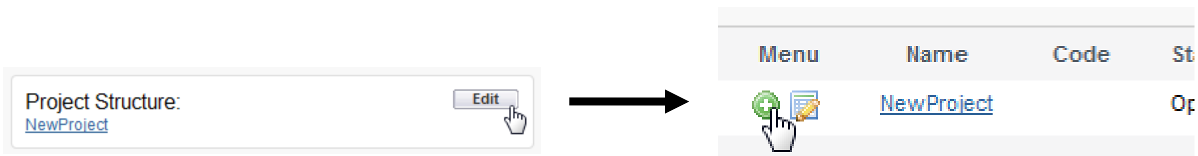


D. Enter advanced project details

Advanced project details include project start and end dates, and cost, hours and expense estimates.

E. Add tasks to the project

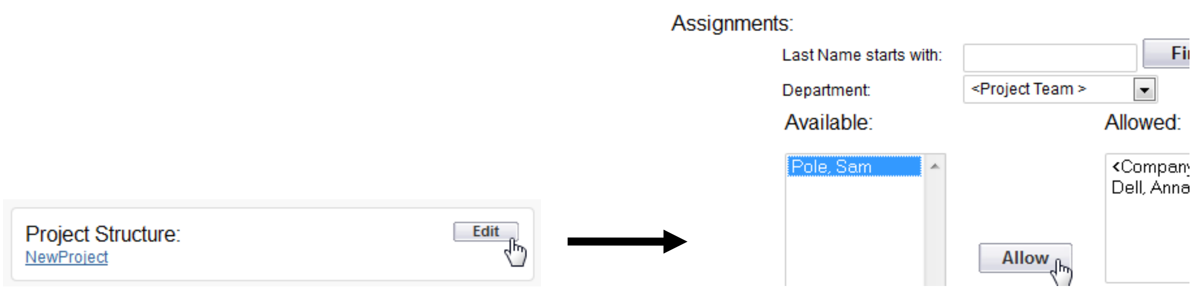
You can create project tasks that team members can enter time against. Creating tasks is not required; time can be entered against the project as a whole.



… and then enter advanced details specific to that task, such as task name, estimated hours or cost, time entry start and end dates, and open/closed status.

F. Assign team members to tasks

Select which project team members are allowed to enter time against this project and its tasks:



G. Add or edit additional information

If desired, you can:

- Edit the list of expense codes that team members are allowed to enter expenses against.

  This option is only available if your organization has a valid license for the **Expenses** module.

- Add activities for users to enter time against.

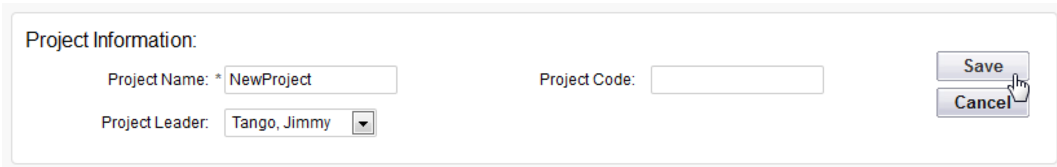
  Activities are globally-defined work functions common to multiple projects. Activities will only be available if **Enable Activities** is selected in **System Preferences**.

- Use project notes to post information regarding project progress.

- Add clients to your project, in addition to the clients you added in step A.

H. Save the Project

Select the **Save** button on the **Project** page:



Additional Resources

For further information on this topic, refer to the Replicon online help, or contact Replicon Customer Support using one of the following methods:

Direct Phone:	403-262-6519 ext 2
Toll-Free Phone:	
North America:	1-877-862-2519 ext 2
Europe/New Zealand:	00-800-8622-5192 ext 2
Australia:	0011-800-8622-5192 ext 2
E-mail:	support@replicon.com
Web-Based Form:	www.replicon.com/Support/RequestHelp.aspx
Fax:	403-233-8046