



Administrator – Company, Branch and Project setup

This section explains the how companies, branches and projects are setup in ProjectVIEW.

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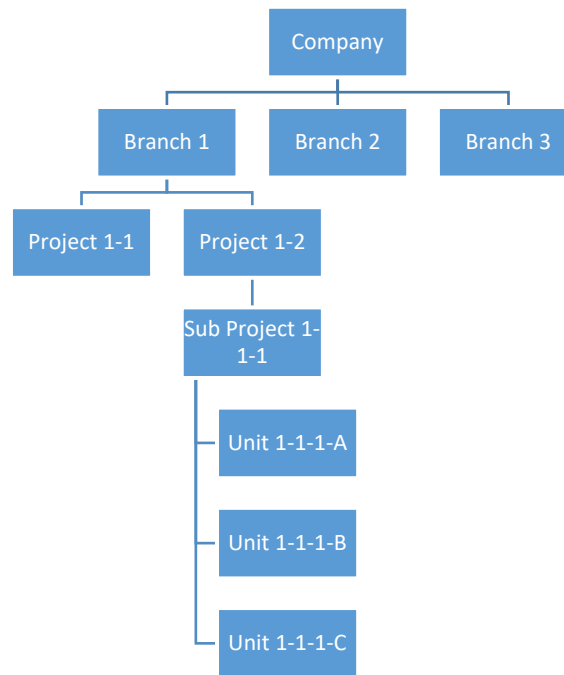
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1 Introduction

ProjectVIEW ERP is designed to closely monitor the cost of the project and its philosophy is project oriented, making ProjectVIEW unique among all other commercial ERPs. It takes into account the complexity of each project and the sectors that control the cost of the projects. Most importantly, it focuses on the quick transfer and use of information, managing to be simple but at the same time effective.

ProjectVIEW uses the following entities to build the project structure:



As it is clear from the picture above, it is possible to have up to five levels of depth in the tree. However not all are needed in order for the system to function properly.

Note

Please note that this manual assumes that the user has a basic understanding of the user interface used throughout ProjectVIEW. Further information can be found in the Manual *“00 01 User Interface”*.

2 Companies

A company is the most basic building block in the system hierarchy. A minimum of one company is needed in the system.

To add, edit or remove a company, the user has to browse the menu to:

“Basic Data” > “Companies” > “Companies”

A grid will be displayed listing all available companies:

The screenshot shows the ProjectVIEW ERP interface with a menu bar at the top and a grid of company data below. The menu bar includes options like Temporing, Budget Control, SubContractors, Purchasing, Inventory, Machines, Accounting, HR, Accounts Receivable, Basic Data, Settings, Others, and Administration. The grid displays the following data:

Company Code	Company Description	Company Description En	Company Type Code	Company Type Description
01	ALPHA COMPANY	ALPHA COMPANY	01	
02	DELTA COMPANY	DELTA COMPANY	01	
10	TERNA			

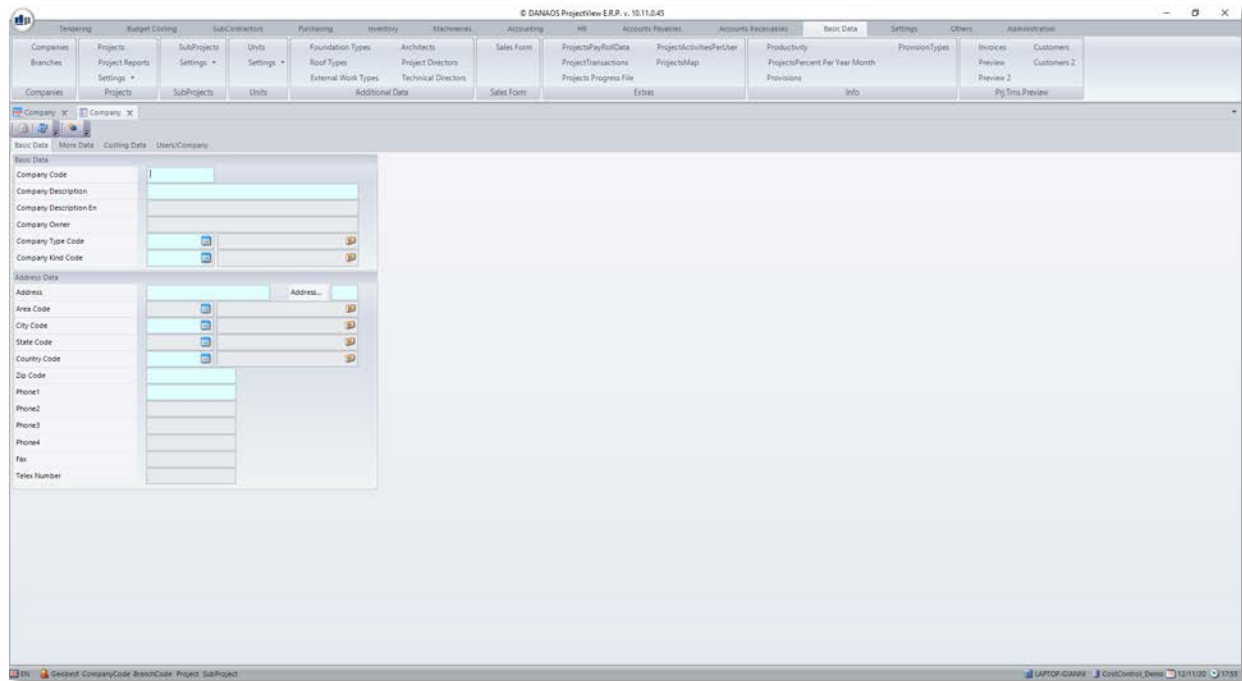
Adding a new company or editing an existing one will display the company form.

2.1 Company Form

Adding or editing a company will display the company form.

2.1.1 Basic Data

This tab includes the company's basic data.



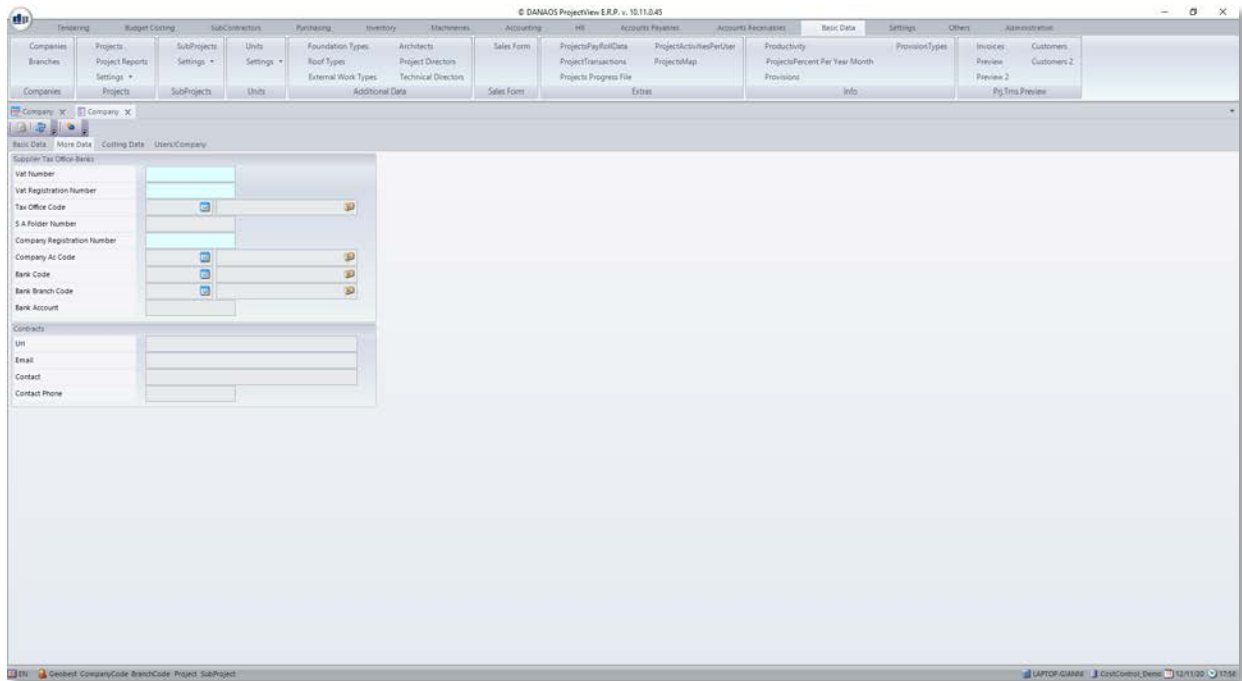
The mandatory fields are:

- ✓ Company Code
- ✓ Company Description
- ✓ Company Description En (English)

All other fields are optional.

2.1.2 More Data

This tab includes additional company data.



All fields in this tab are optional.

3.1 Branch Form

Adding or editing a branch will display the branch form.

3.1.1 Basic Data

This tab includes the branch's basic data.

The screenshot displays the 'Branch Form' in the ProjectVIEW ERP system. The 'Basic Data' tab is active, showing a form with the following sections and fields:

- Basic Data:**
 - Company Code
 - Branch Code
 - Branch Description
 - Branch Description En
- Address Data:**
 - Address
 - Area Code
 - City Code
 - State Code
 - Country Code
 - Zip Code
 - Phone1
 - Phone2
 - Phone3
 - Phone4
 - Fax
 - Telex Number

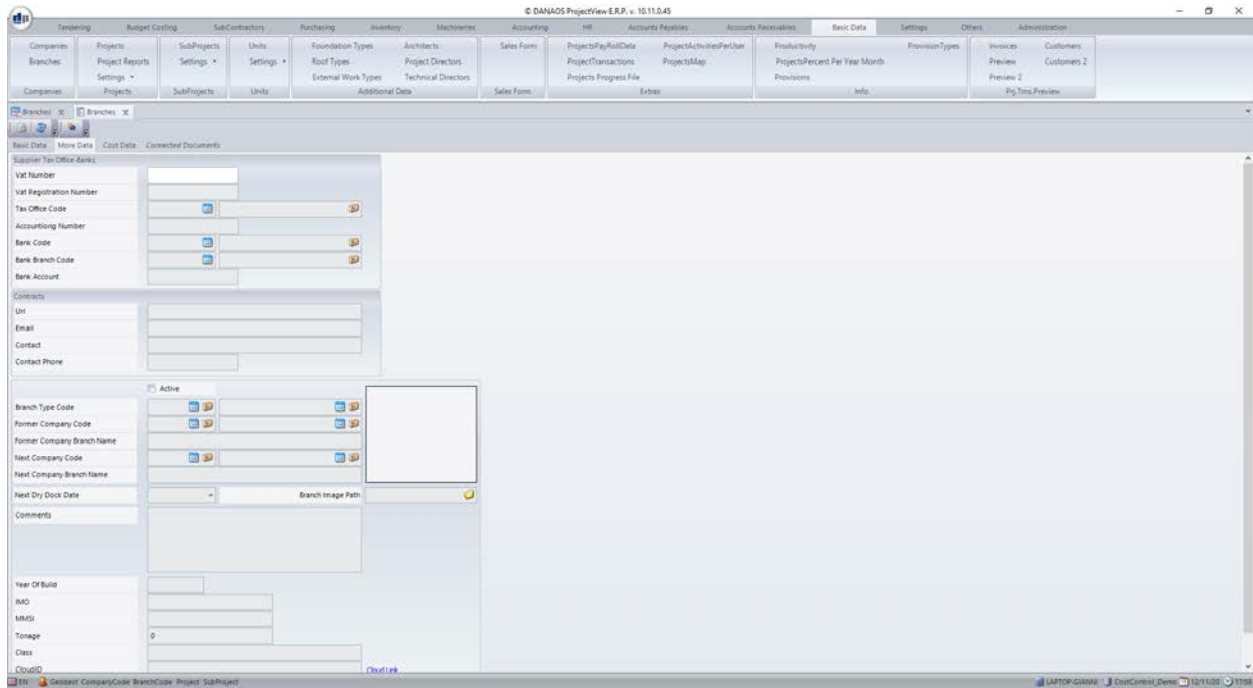
The mandatory fields are:

- ✓ Company Code
- ✓ Branch Code
- ✓ Branch Description
- ✓ Branch Description En (English)

All other fields are optional.

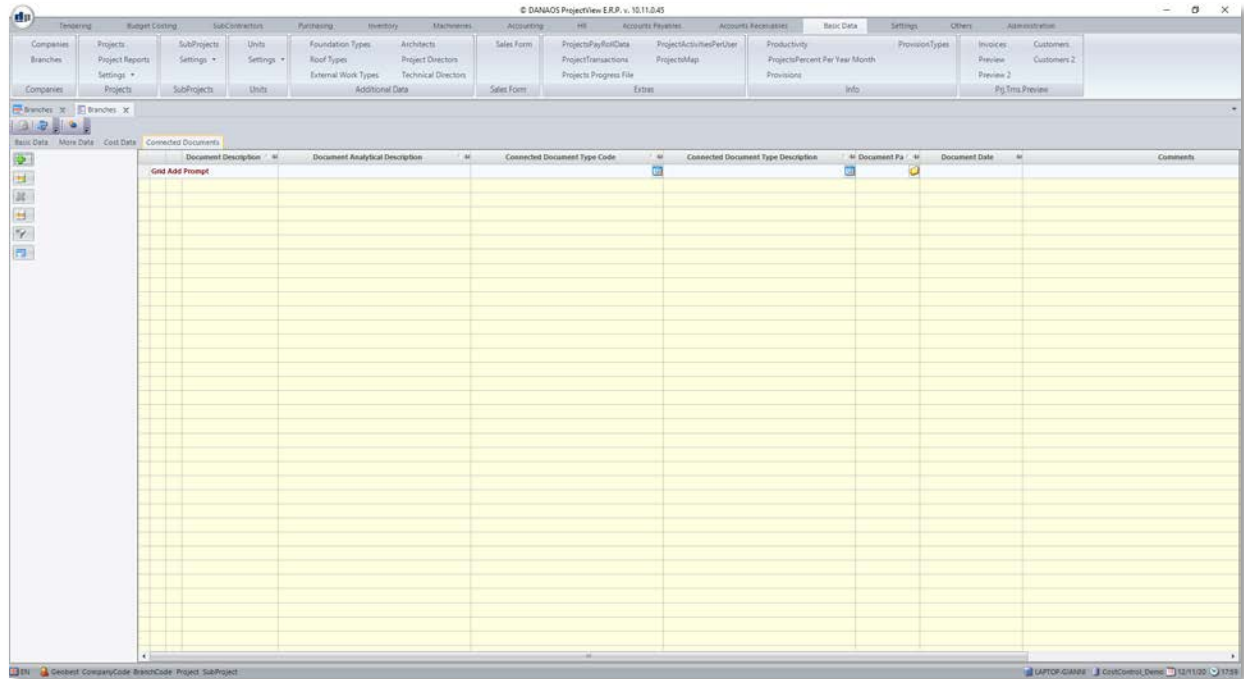
3.1.2 More Data

This tab includes additional branch data.



3.1.3 Connected Documents

It is possible to associate a branch with one or more documents (e.g. certificates). This tab allows for these documents to be associated with the branch.



4 Projects

Each branch can have one or more projects. A minimum of one project per branch is needed in the system.

To add, edit or remove a project, the user has to browse the menu to:

“Basic Data” > “Projects” > “Projects”

A grid will be displayed listing all available projects:

Company Code	Branch Code	Project Code	Project Description	Address	Address No	City Code	Phase	Customer Code	Customer
01	01	755	GRAND THEATER						
01	01	765	Project 765						
01	01	771	Project 771						
01	01	777	Project 777						
01	01	779	Project 779						
01	01	789	Project 789						
01	01	800	Big 5 2019						
01	01	900	Project 900						
01	01	910	Project 910						
01	TD	999	TD-Template						
TD	TD01	AT001-01	ESGO-CEP/EA A						
01	01	BLD5	BUILDING5						
01	01	BLD7	BUILDING7						
01	01	BRIDGE-110	BRIDGE-110					0002	General Organization Soci
01	01	BRIDGE-112	BRIDGE-112						
01	01	BRIDGE-115	BRIDGE-115						
01	01	BUILD01	Building 01					0001	Public Pension Fund/ Rar c
01	01	CCC	Demo for CCC						
01	01	CL1	Project CL1						
01	01	KARF0505	KARF-CL1-Stage 2 - Parcel 5.05						
01	01	P000	Project P000						
01	01	P-1.08	Works Under LoCA and HTP - 1.08 - Detailed Baseline						
01	01	P222	Project P222						
01	01	P300	Project 300 - Villa						
01	01	P551	Star Tower						
01	01	PM-001	PM-001 Project						
01	01	TD-001	TENDERING -001						
01	TD	TD-001	Tendering for Cinema B						
01	TD	TD-002	TENDERING 002						
01	TD	TD-003	A Tower						
01	TD	TD-005	Building A						
01	TD	TD010	Project TD010						
01	TD	TD-010	School building in Area A						
01	TD	TD-109	Project TD-109						
01	01	VILLA3	Mr. GIRISH HIRANANDANI VILLA- codes and modificatio						

Adding a new project or editing an existing one will display the project form.

4.1 Project Form

Adding or editing a project will display the project form.

4.1.1 Basic Data

This tab includes the project's basic data.

The screenshot displays the 'Basic Data' tab of the ProjectVIEW ERP software. The interface is a web-based form with a top navigation bar containing various modules like Companies, Projects, SubProjects, Units, Foundation Types, Architects, Sales Form, etc. The main content area is divided into two sections: 'Basic Data' and 'Address Data'. The 'Basic Data' section contains fields for Company Code, Branch Code, Project Code, Project Description, Project Description En, and Project Analytical Description. The 'Address Data' section contains fields for Address, Area Code, City Code, State Code, Country Code, Zip Code, Phone1, Phone2, Phone3, Phone4, Fax, and Telex Number. Each field has a small blue icon to its right, likely for data selection or validation. The bottom status bar shows the user's name, company code, branch code, project code, and sub-project code, along with the system date and time.

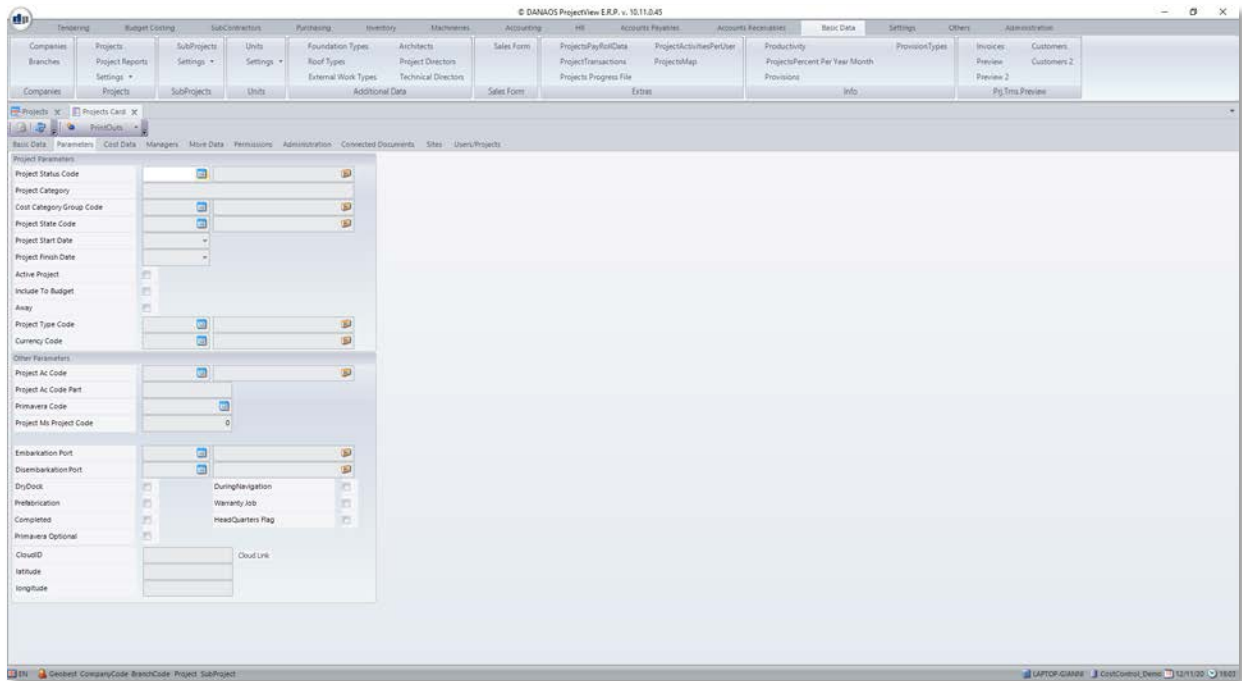
The fields required to create a project are:

- ✓ Company Code
- ✓ Branch Code
- ✓ Project Code
- ✓ Project Description
- ✓ Project Description En (English)

All other fields are optional.

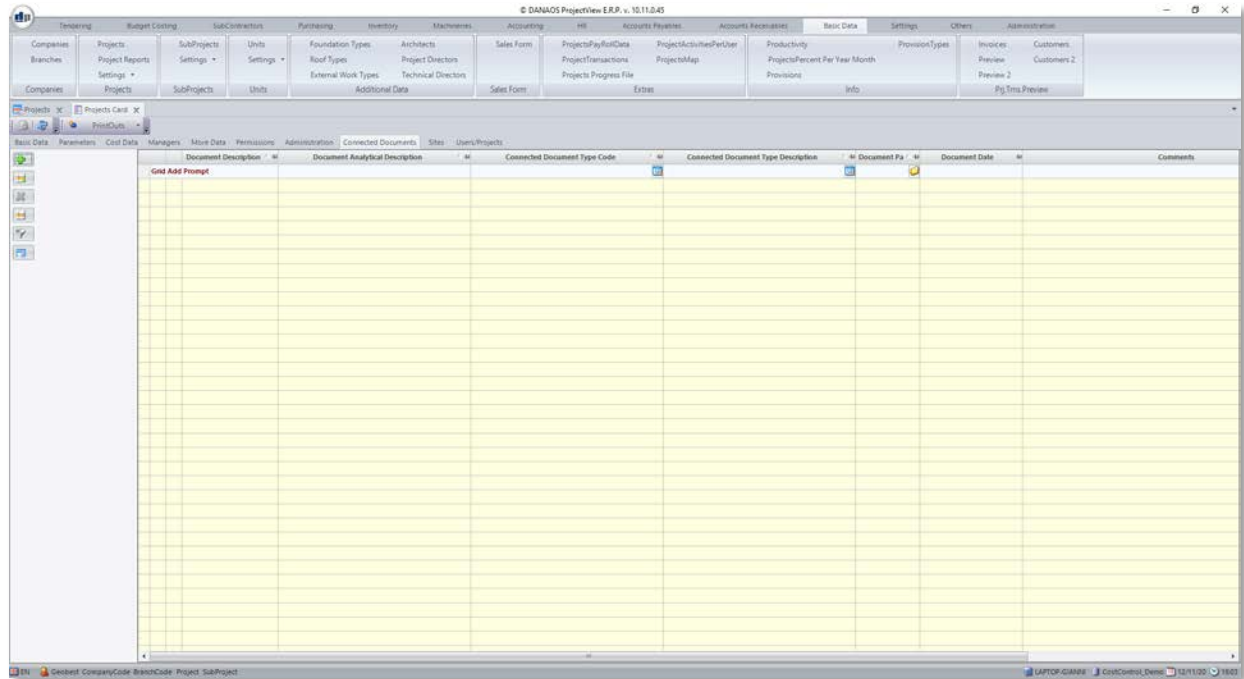
4.1.2 Parameters

This tab includes additional project data.



4.1.3 Connected Documents

It is possible to associate a project with one or more documents (e.g. certificates). This tab allows for these documents to be associated with the project.

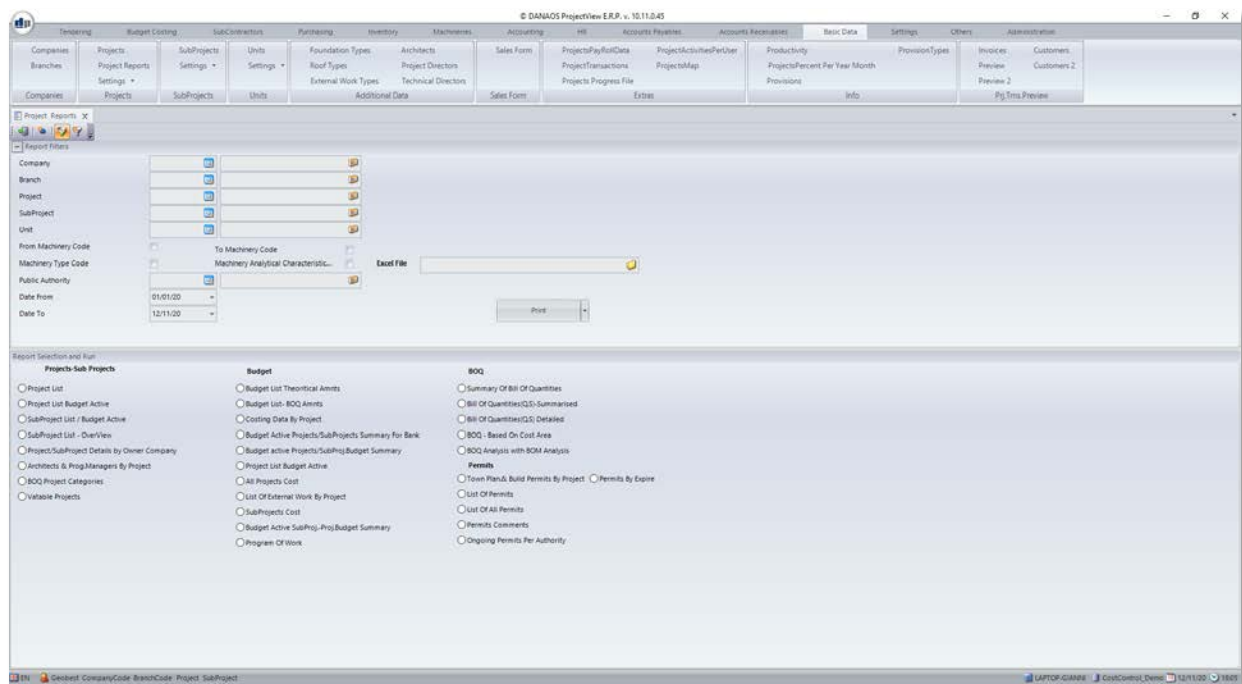


4.2 Project Reports

To view all available reports, the user has to navigate to:

“Basic Data” > “Projects” > “Project Reports”

This will display the following form:



After providing the appropriate parameters the user can select a report and click on the *“Print Preview”* button to view it.

4.3 Appendix – Project Settings

There are various fields in the projects, which use predefined codes. These are:

- ✓ Project Types
- ✓ Project Status
- ✓ Project States
- ✓ Project Type Cost Methods
- ✓ Project Faces

To view/add/edit the above, the user has to navigate to:

“Basic Data” > “Projects” > “Settings” > ...

and then choose the appropriate item from the list.

5 Sub Projects

Each project can have one or more sub projects.

To add, edit or remove a sub project, the user has to browse the menu to:

“Basic Data” > “SubProjects” > “SubProjects”

A grid will be displayed listing all available sub projects:

Sub Project Code	Sub Project Description	Project Code	Project Description	Company Code	Company Description	Branch	Branch Description	Sub Project Description En
BRIDGES	BRIDGES	001	PROJECT -001	01	ALPHA COMPANY	01	ALPHA COMPANY	
BRT-5TH-A2	BRT-5TH-A2	001	PROJECT -001	01	ALPHA COMPANY	01	ALPHA COMPANY	
BRT-5TH-A3	BRT-5TH-A3	001	PROJECT -001	01	ALPHA COMPANY	01	ALPHA COMPANY	
CBS-1	CBS-1	001	PROJECT -001	01	ALPHA COMPANY	01	ALPHA COMPANY	
CBS-2	CBS-2	001	PROJECT -001	01	ALPHA COMPANY	01	ALPHA COMPANY	
CBS-3	CBS-3	001	PROJECT -001	01	ALPHA COMPANY	01	ALPHA COMPANY	
CBS-4	CBS-4	001	PROJECT -001	01	ALPHA COMPANY	01	ALPHA COMPANY	
ETERM	Eastern Terminus	001	PROJECT -001	01	ALPHA COMPANY	01	ALPHA COMPANY	
ROADS	Roads	001	PROJECT -001	01	ALPHA COMPANY	01	ALPHA COMPANY	
S.TERM	Southern Terminus	001	PROJECT -001	01	ALPHA COMPANY	01	ALPHA COMPANY	
BRIDGES	BRIDGES	002	PROJECT -002	01	ALPHA COMPANY	01	ALPHA COMPANY	
BRT-5TH-A3	BRT-5TH-A3	002	PROJECT -002	01	ALPHA COMPANY	01	ALPHA COMPANY	
CBS-1	CBS-1	002	PROJECT -002	01	ALPHA COMPANY	01	ALPHA COMPANY	
CBS-2	CBS-2	002	PROJECT -002	01	ALPHA COMPANY	01	ALPHA COMPANY	
CBS-4	CBS-4	002	PROJECT -002	01	ALPHA COMPANY	01	ALPHA COMPANY	
ROADS	Roads	003	PROJECT -002	01	ALPHA COMPANY	01	ALPHA COMPANY	
800-01	Danass Stand 201	800	Big 5 2019	01	ALPHA COMPANY	01	ALPHA COMPANY	
800-02	Microsoft Stand 456	800	Big 5 2019	01	ALPHA COMPANY	01	ALPHA COMPANY	

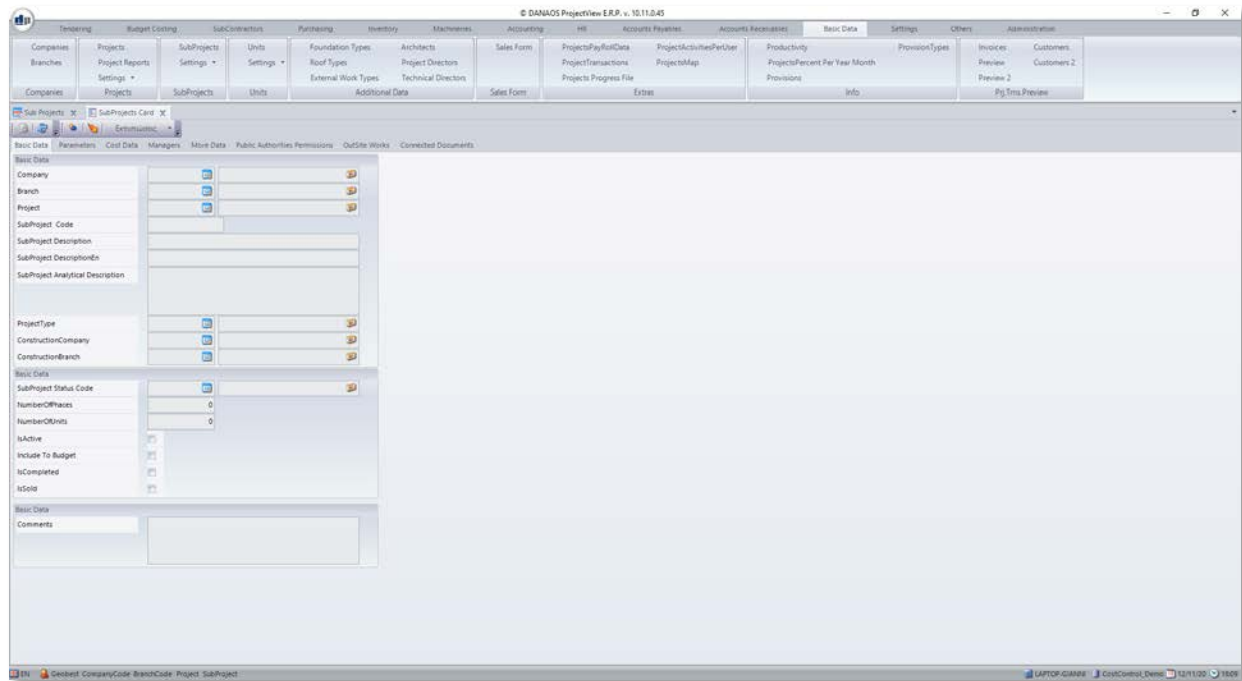
Adding a new sub project or editing an existing one will display the sub project form.

5.1 Sub Project Form

Adding or editing a sub project will display the sub project form.

5.1.1 Basic Data

This tab includes the sub project's basic data.



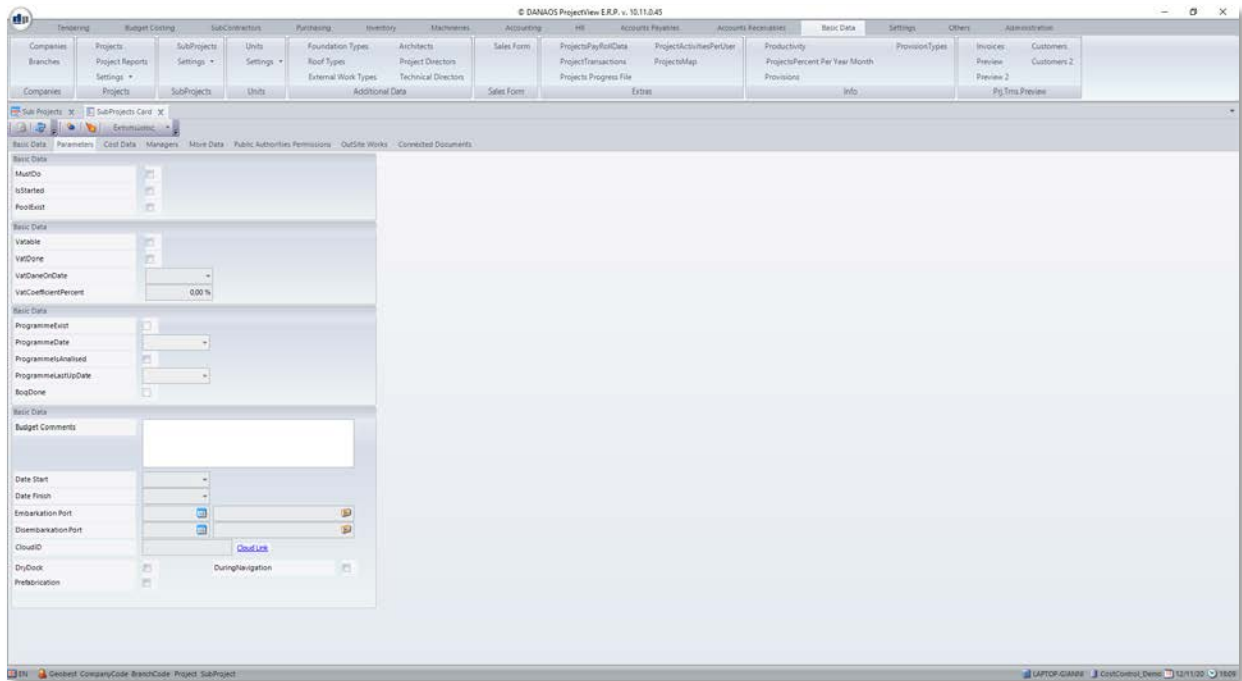
The fields required to create a project are:

- ✓ Company Code
- ✓ Branch Code
- ✓ Project Code
- ✓ Sub Project Code
- ✓ Sub Project Description
- ✓ Sub Project Description En (English)

All other fields are optional.

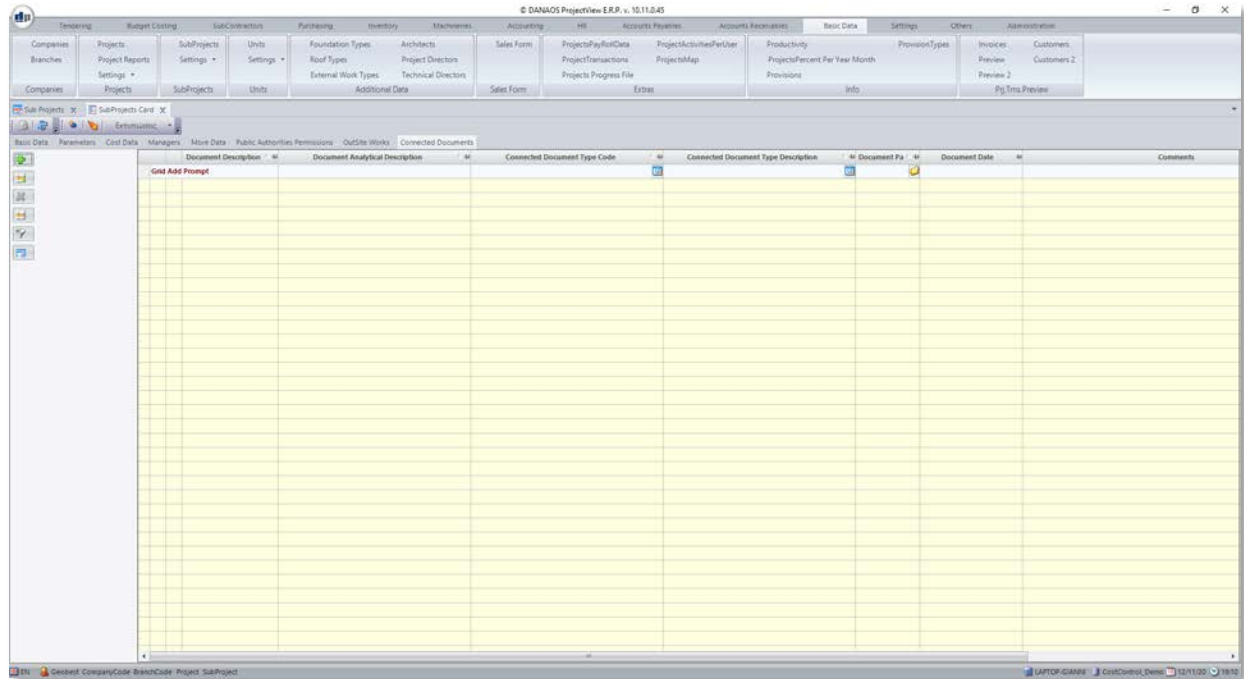
5.1.2 Parameters

This tab includes additional sub project data.



5.1.3 Connected Documents

It is possible to associate a sub project with one or more documents (e.g. certificates). This tab allows for these documents to be associated with the sub project.



5.2 Appendix – Sub Project Settings

There are various fields in the sub projects, which use predefined codes. These are:

- ✓ Sub Project Unit Payment Types
- ✓ Template Sub Project Cost Account Values

To view/add/edit the above, the user has to navigate to:

“Basic Data” > “Sub Projects” > “Settings” > ...

and then choose the appropriate item from the list.

6 Units

Each sub project can have one or more units. Units are optional but can be used to provide a fifth level of analysis in the hierarchy.

To add, edit or remove a unit, the user has to browse the menu to:

“Basic Data” > “Units” > “Units”

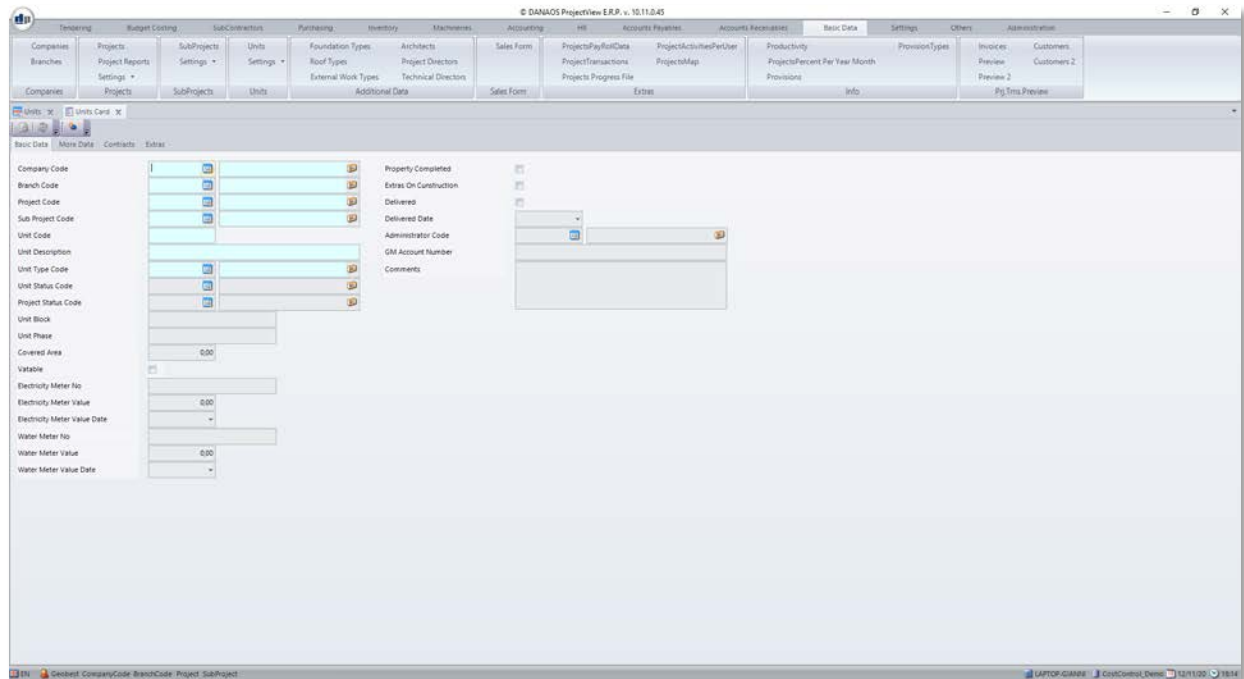
A grid will be displayed listing all available units:

Company Code	Company Description	Branch Code	Branch Description	Project Code	Project Description	Sub Project Code	Sub Project Description
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001	BRIDGES	BRU-111-07
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001	BRIDGES	BRU-112-10
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001	BRIDGES	BRU-112-15
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001	BR1-07N-A2	43025
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001	BR1-07N-A2	43027
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001	BR1-07N-A2	43029
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001	BR1-07N-A3	43005
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001	BR1-07N-A3	43007
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001	CRG-3	61102
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001	CRG-3	61112
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001	CRG-3	61431
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001	CRG-3	61700
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001	E.TERM	Eastern Terminus
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001	S.TERM	Southern Terminus
01	ALPHA COMPANY	01	ALPHA COMPANY	001	PROJECT -001		41001

Adding a new unit or editing an existing one will display the unit form.

6.1 Unit Form

Adding or editing a sub project will display the unit form.



The fields required to create a unit are:

- ✓ Company Code
- ✓ Branch Code
- ✓ Project Code
- ✓ Sub Project Code
- ✓ Unit Code
- ✓ Unit Description
- ✓ Unit Description En (English)

All other fields are optional.

6.2 Appendix – Unit Settings

There are various fields in the units, which use predefined codes. These are:

- ✓ Unit Types
- ✓ Unit Status
- ✓ Unit Property Status

To view/add/edit the above, the user has to navigate to:

“Basic Data” > “Units” > “Settings” > ...

and then choose the appropriate item from the list.



In case of any queries or support issues, please
contact us:

DANAOS Projects Software Solutions

Tamani Head Office - Office 1923

Business Bay

Dubai - UAE, P.O. Box 24051

Email: support@danaos-projects.com

Tel: +971 4 8714149