

Add/Edit project

Navigation and project creation

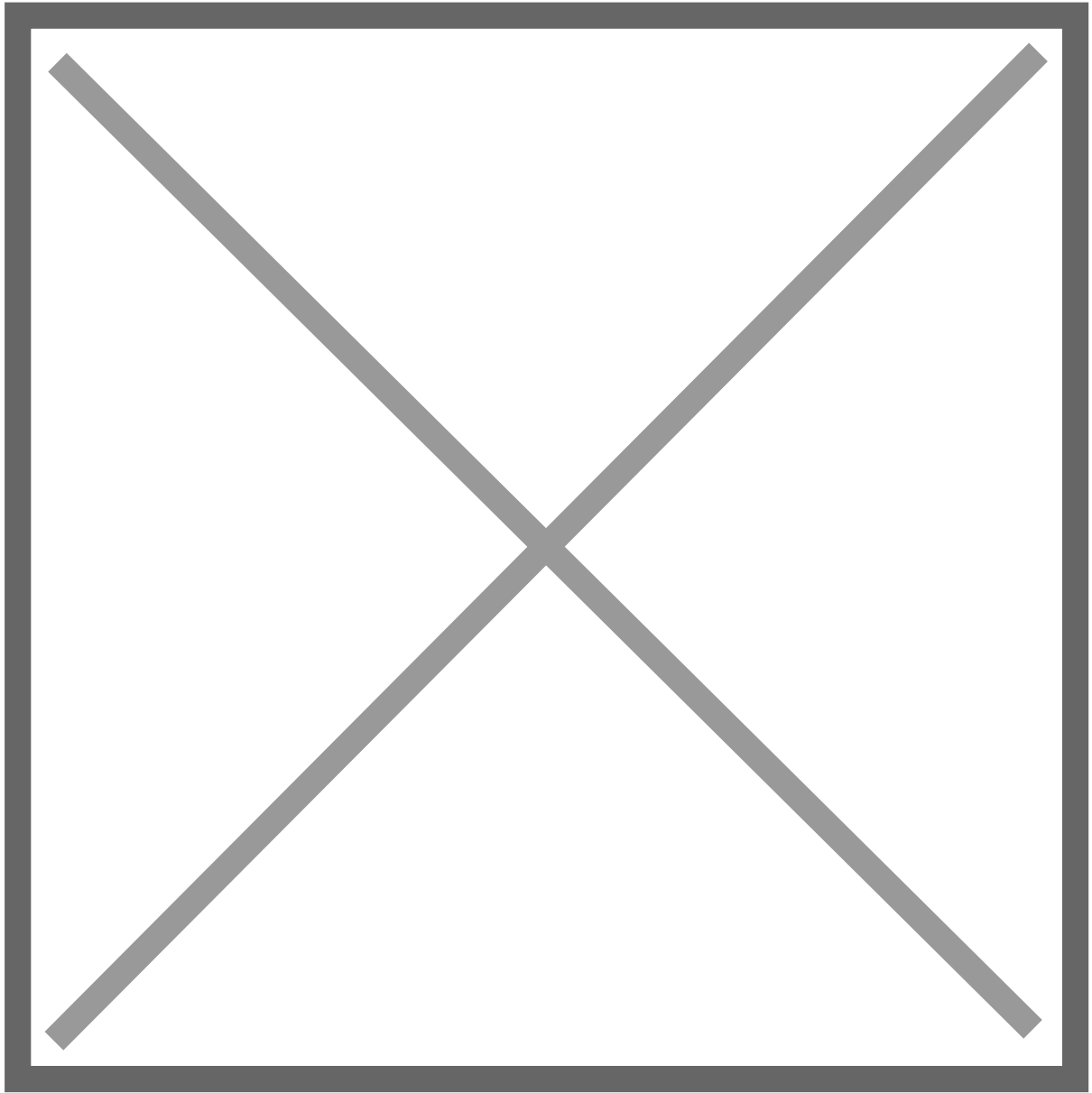
Top bar navigation [1] At the moment, titra has three selection options:

- **Track** - opens the time tracking view.
- **Overview** - opens the project overview with histogram and pie chart.
- **Details** - opens the table view with detailed information and filter possibilities.

Settings-Dropdown [2]

contains following sections: [Profile](#), [Settings](#) and [About](#)

New Project [3] Adds a new project and opens its options.



How to set up the new project

First click on the **New project** button [3]. The settings page will be opened.

<https://app.titra.io/create/project>

The project will not be created until the settings are saved for the first time.

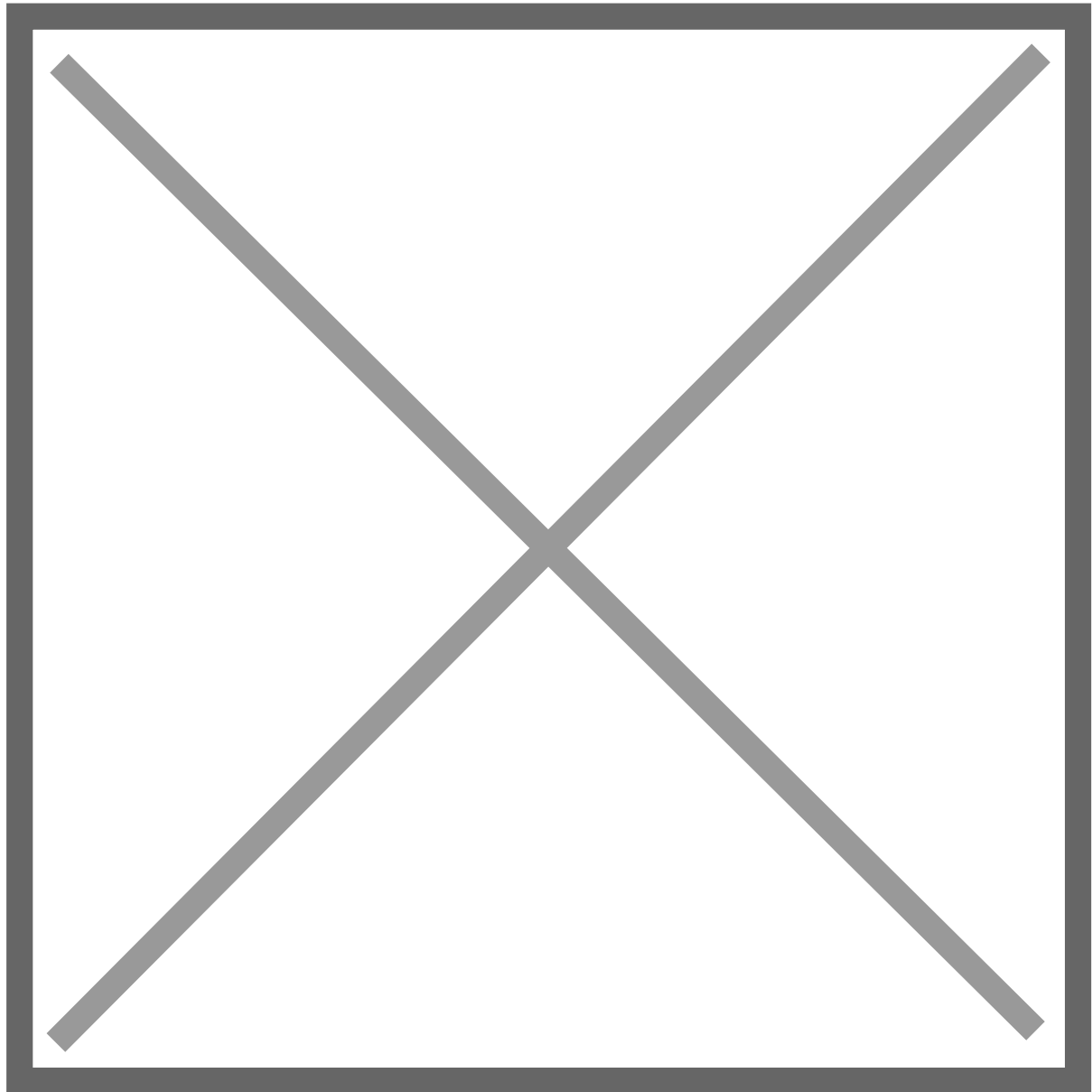
Add a **Name** for your project.

Add a project **Description**.

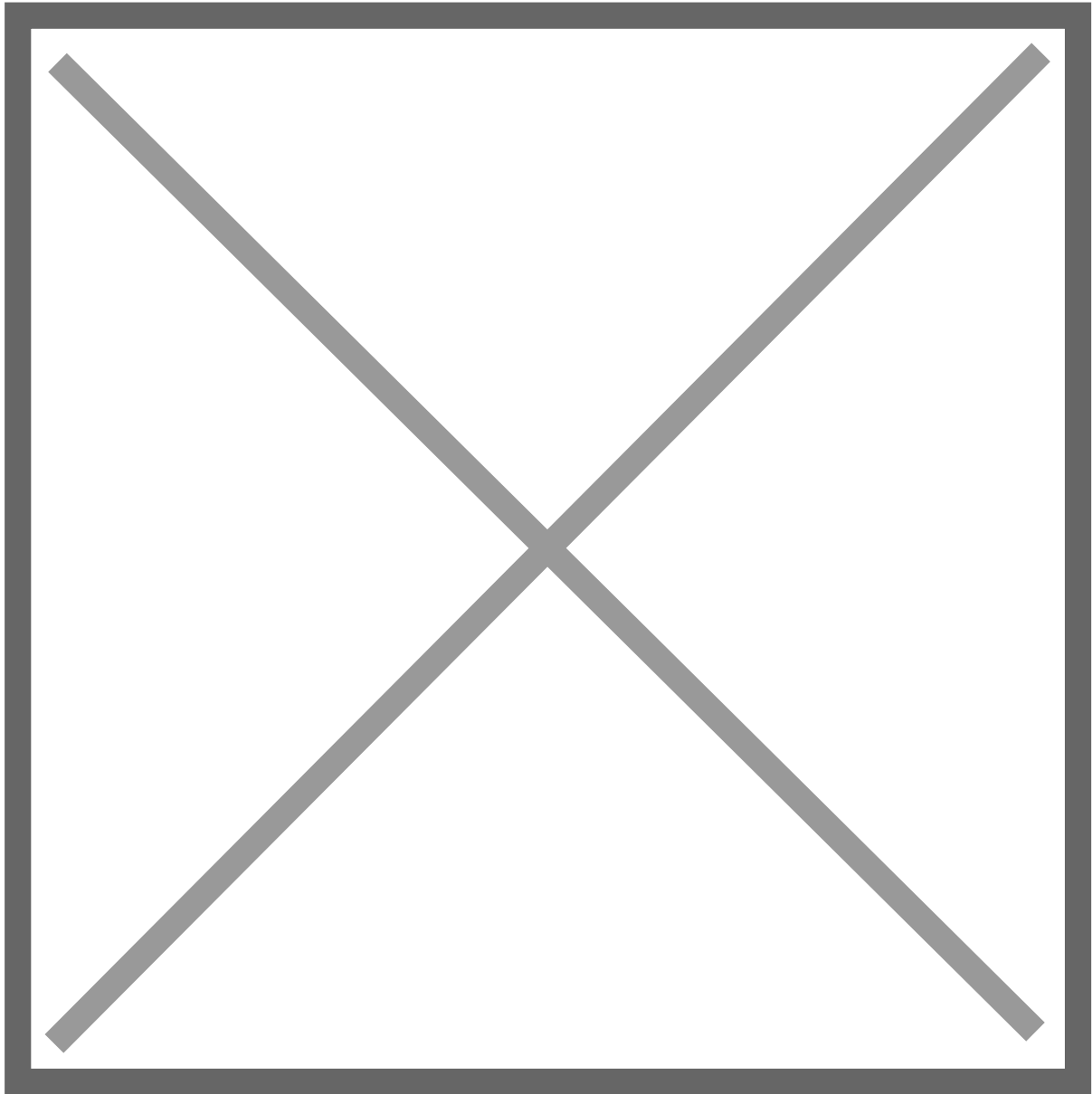
Set a custom **Color** to the project. Click colored button to open the color picker.

Add a **Customer** to the project.

Set a **Rate(\$/hour)** to the project. For example: 102.45 per tracked hour. Cost unit can be changed in the **Settings**.



Set a **Target/Budget** to the project. *For example: 25000 hours.*

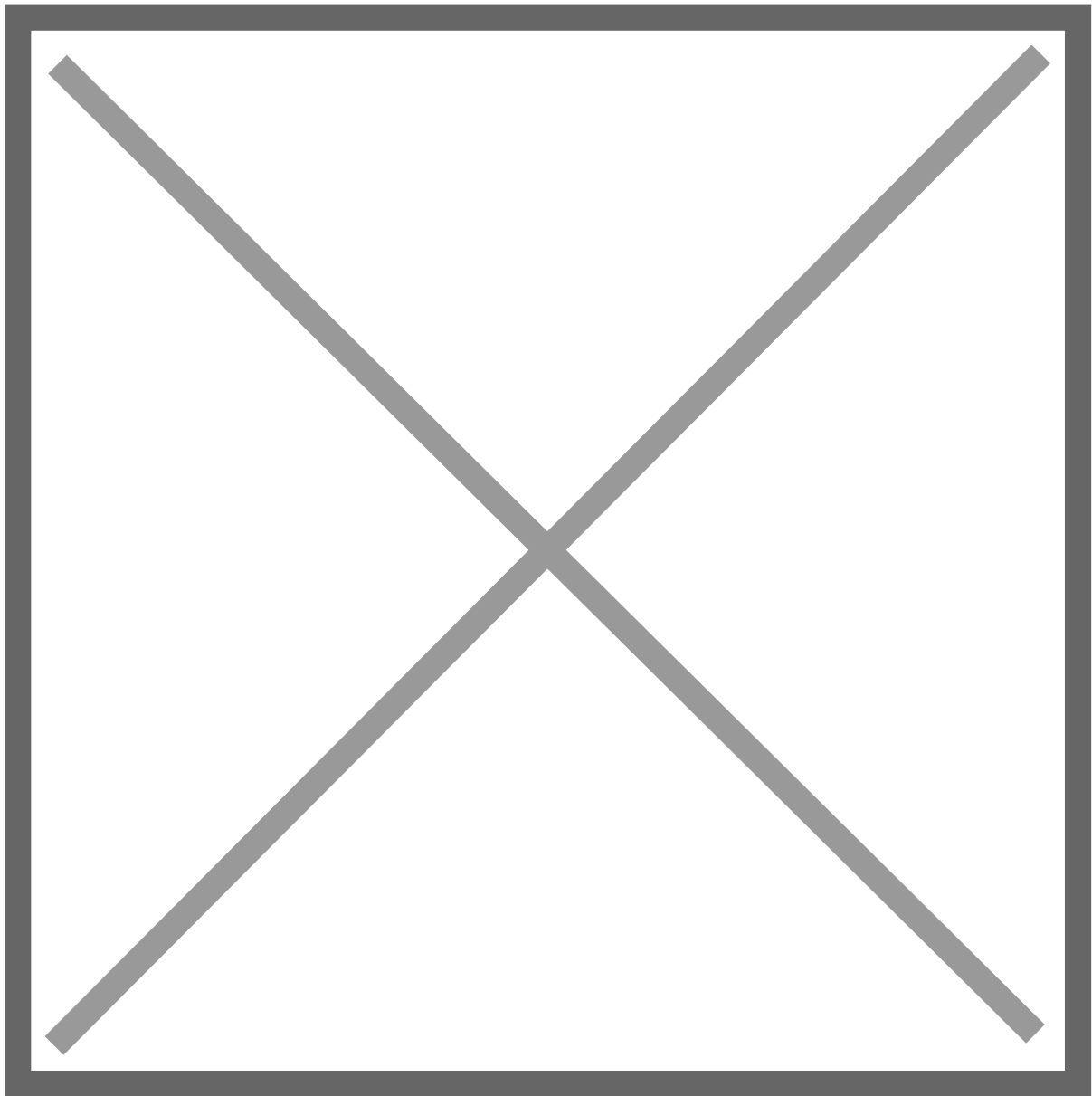


Press **Save** to create the Project. The project settings can be adjusted at any time.

Access rights

The **Access rights** are displayed **after saving**. Add colleagues or co-workers to give them access to the project. Type in the e-mail of your contact and press the **Add** button. Repeat the process to add more contacts.

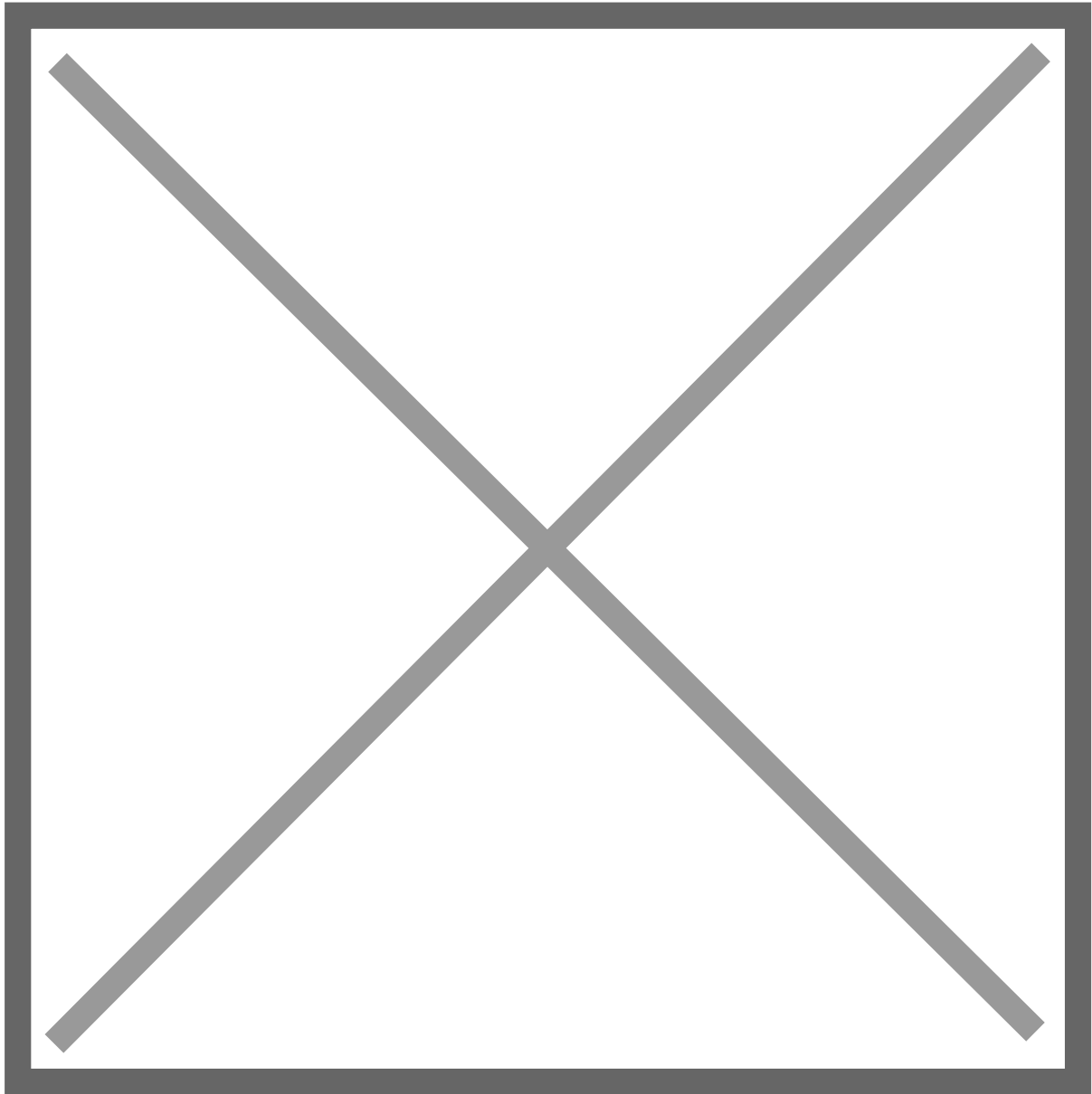
To grant access to all users enable the check box ☒ **Public project (visible to all users)** ☐



Edit an existing project

Edit your existing project by clicking **Edit** in the **Overview section**.

Keep in mind, this option is only available if you own the project or have **access rights**.



Archiving an existing project

The idea behind archiving is that you usually don't want to delete a project right away - you probably know that situation, no work has been done for a customer in quite a while, you "close" the project but then there is a follow-up. That's the main reason why we opted for archiving as a first step instead of deleting projects directly. If you archive a project it will be hidden from all views with one exception:

After archiving a project you can display it still in the overview using the filter toggles:

image

If you show archived projects you will see all archived projects in the overview and get additional buttons to restore and completely delete a project:

image

Revision #7

Created 30 July 2021 06:59:09 by Thomas Leb

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