Software by Design
Nextcloud apps

Projects · Time · Billing

ProjectCheck

User manual

End-user documentation for the web app

Customers, projects and time entries on your Nextcloud.

App version	Language	Date
2.0.104	**English**	**30 October 2026**

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Introduction

ProjectCheck is the Nextcloud app for customers, projects, employees, time entries and optional budgets on your instance. You log hours, steer teams and settle open entries — optionally with ArbeitszeitCheck and InvoiceCheck. Web free (AGPL); the optional companion needs a mobile licence and seats — bordered here only.

As of: App-Version **2.0.104** (Commit `d02d147`), Companion **1.2.16**, 30 October 2026, English (professional register).

Atlas farm POLICY 3.5.17 dual ACCEPT; Menu drawer, access menu gate and in-app confirm dialogs documented.

Audience: Project members · project managers · app / Nextcloud administrators.

What you need: ProjectCheck access · a browser with JavaScript · app-admin rights for settings.

Chapters: Ch. 1 roles · 2 getting started · 3–9 daily work · 7–8 customers/employees · 14 admin · 15 errors/FAQ.

Register: Body text uses professional English. UI chrome in quotes, e.g. **Dashboard**, **Time Entries**,

Invoice all open hours and **Access denied**.
Quick start (member): **Time Entries** → **Add Time Entry** → save project/date/hours.
Quick start (admin): Check **Access**/**Defaults** → customers → projects → team → billing.

1 Roles and who this manual is for

ProjectCheck separates two different questions: *may you open the app at all*, and *what may you do once you are inside*. The first is the *access door* that an administrator controls on the settings page (chapter 13); the second is your role, which shows as a badge next to the app name on every page. Because the two layers are independent, a person can be a project manager on one project and a plain member on the next — and someone outside every allowlist never reaches the app at all, not even its icon.

1.1 The roles at a glance

Administrator A Nextcloud system administrator, or a user named under **Settings** → **App admins**. Administrators see every project, customer, employee and time entry, manage the access door, defaults, licence and seats, and may book time on projects they do not belong to (the app shows an override banner when they do).

Project creator Whoever created a project keeps owner rights on it: edit, delete, manage the team and — unless restricted — settle its hours.

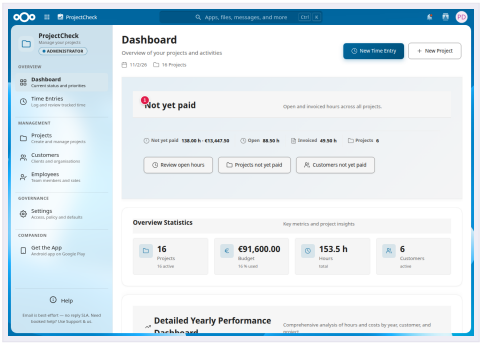
Project manager A team member whose role on that project is **Project manager**. Managers see the team's time entries on their projects and may settle them: mark hours invoiced or paid, or reopen a locked entry when a correction is needed.

Member A team member with role **Member**. Members log and edit their own time entries while those entries are still open, and see the projects they belong to — but not other people's hours and not any settings.

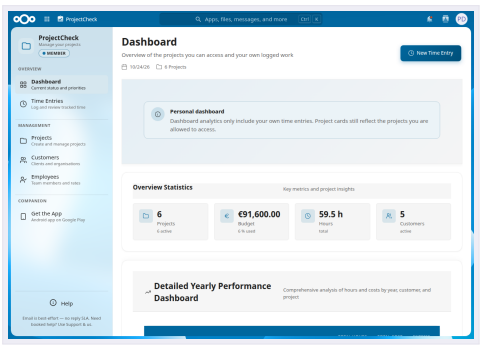
1.2 Who can do what

	Member	Project manager	Creator	Administrator
Log own time, edit while open	✓	✓	✓	✓
See own projects and own hours	✓	✓	✓	✓
See team hours on own projects	—	✓	✓	✓
Settle hours (invoice, paid, not billable)	—	✓	✓	✓
Reopen a locked entry	—	✓	✓	✓
Create projects and customers	—	—	✓*	✓
Edit team, rates, project master data	—	✓	✓	✓
Access door, defaults, licence, seats	—	—	—	✓

* Depending on policy, creating projects and customers can be limited to administrators; members then read **Ask an administrator if you need a new project.** next to the creation actions.



Marker 1: a project manager's **Not yet paid** block — the settlement queue only authorised roles see.



A member's **Personal dashboard**: own hours only, no settlement block.

The two dashboards above show the same page through different roles. The manual therefore notes per chapter which role a procedure needs; if your screen looks different, chapter 13 explains the door and chapter 15 lists every message you can hit.

2 Getting started: your first hour in fifteen minutes

This chapter walks the shortest path from sign-in to a logged, reviewed hour. The examples use the demo project's real names — the customer *Nordlicht GmbH* and its project *Website-Relaunch Nordlicht* — but every step works the same way with your own data. You need a Nextcloud account that is allowed to open ProjectCheck and, for the first-run part, an administrator who has created at least one customer and project.

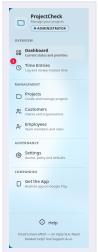
2.1 Step 1: sign in and open the app

1. Sign in to Nextcloud with your usual account.
2. Choose **ProjectCheck** in the app bar. The app opens on **Dashboard**.
3. **You see:** the dashboard and, under the app name, your role badge — **Administrator** or **Member**.

If **ProjectCheck** is missing from the app bar, or you land on a page titled **Access denied**, the access door is closed for your account. That is deliberate, not a bug — ask an administrator to add you to the allowlist (chapter 13). The button **Go to your Nextcloud** on that page always takes you back.

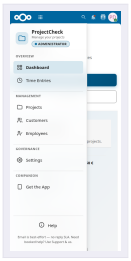
2.2 Step 2: learn the map

The left sidebar is the **ProjectCheck navigation**. It groups the app by job, not by menu depth: **Dashboard** and **Time Entries** for daily work; **Projects**, **Customers** and **Employees** for the directories; **Settings** for administrators only; **Get the App** for the mobile companion; and **Help** in the footer for feedback and support links.



Marker 1: the navigation — the same items appear as a drawer when you tap **Menu** on a phone.

On phones and narrow windows the sidebar collapses. Tap **Menu** above the content to open the same navigation as a drawer, and **Close navigation menu** to put it away. Nothing else changes — every page, action and filter works identically.



2.3 Step 3 (member): log your first hour

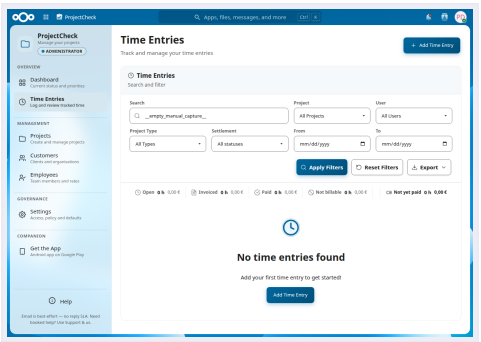
1. Open **Time Entries** and choose **Add Time Entry**.
2. Pick the project, e. g. *Website-Relaunch Nordlicht*. Only projects you may book on are offered.
3. Enter the date and the hours, e. g. `2.5`, and an optional description such as *Korrekturen nach Kundenfeedback*.
4. Choose **Save**.
5. **You see:** the new entry at the top of your list with billing status **Open** — editable and deletable until a project manager settles it (chapter 9).

The form computes the amount live from the hourly rate that applies to you on that project, so a wrong rate is visible before you save rather than after. If the project carries a budget, **Budget impact** below the form shows what this entry will consume.

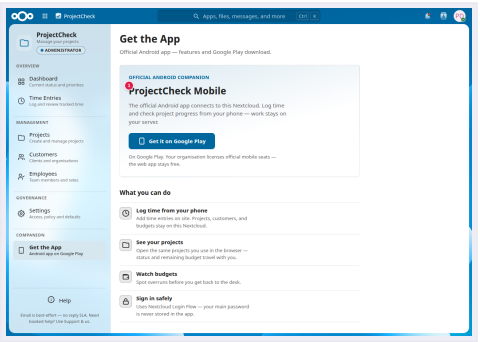
2.4 Step 4 (administrator): seed the workspace once

A fresh installation is empty in the order you would expect: no customers, so no projects; no projects, so no time entries. The one-time setup mirrors that dependency:

1. Open **Settings** and check **Access** — leave the door open for now, or list the users and groups who may enter (chapter 13).
2. Review **Defaults**: currency, default hourly rate and the budget warning thresholds that drive the dashboard alerts.
3. Create the first customer under **Customers** → **Add New Customer**.
4. Create the first project under **Projects** → **Create New Project** — name, customer, and later team, budget and pricing mode.
5. Open the project, add the team with **Add team member**, and you are done: members can now log time (chapter 5).



An empty directory before the first entry — the app always offers the next action, never a dead end.



Marker 1: **Get the App** presents the optional Android companion; the web app needs no licence.

2.5 A worked example: Lena's first week

Seeing the pieces move in sequence is worth more than any menu tour, so here is one complete first week on the seeded demo data. Lena Brandt is a member on the *Website-Relaunch Nordlicht* project for the customer *Nordlicht GmbH*; her project manager reviews and settles her hours.

Monday. Lena opens **Time Entries**, chooses **Add Time Entry** and books `7.5` hours on *Website-Relaunch Nordlicht* with the note *Frontpage layout rework*. The form shows her hourly rate and the resulting total as she types; the entry lands in her list as **Open** — fully editable, because nobody has settled it yet.

Tuesday. She realises the note should mention the customer review. Because the entry is still open she edits it in place and corrects the description; no approval was needed, because open entries belong to their author. She books another `6` hours, this time reading the **Budget impact** block first: it tells her the project is at 68 % of its budget and that her day would push it past the warning threshold her administrator configured — visible in amber on the dashboard afterwards.

Wednesday. Her project manager filters **Time Entries** to settlement state **Open**, ticks Lena's rows and marks them **Mark invoiced** from the billing bar. From that moment the entries are *locked*: Lena can still read them but can no longer edit or delete them, because settled numbers must not mutate after the fact.

Thursday. Finance pays the invoice. The project manager runs the same filtered view and marks the entries **Mark paid**. Lena's personal dashboard now shows nothing open — her week is fully accounted.

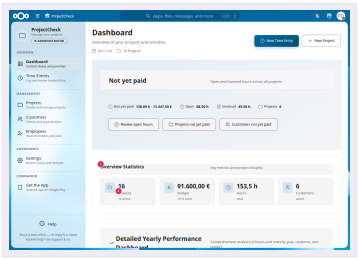
Friday. A typo turns up: Tuesday's entry should have been `6.5` hours. The entry is locked, so Lena asks her project manager, who uses **Reopen** on that single entry, she fixes the hours, and the manager settles it again. The correction is an explicit round-trip, not a silent edit — that is exactly the behaviour chapter 9 explains in depth.

The same five days work identically for every member on every project: book while open, settle through the lifecycle, reopen only through a manager. Once this rhythm is familiar, the rest of the manual reads as reference rather than tutorial.

3 Dashboard

Dashboard is the app's front page and answers three questions at a glance: how much is running, where money or budgets need attention, and what happened recently. What it shows depends on your role — administrators get the global view with **Overview Statistics**, **Budget Alerts** and **Not yet paid**; members get a **Personal dashboard** analysing only their own entries.

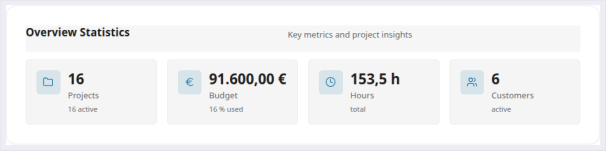
3.1 Reading the page



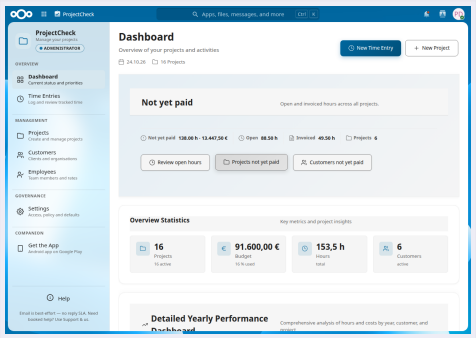
Marker 1: the metric strip — marker 2: a single card. Below it the page continues with settlement and analysis blocks.

The top strip counts the workspace: projects, budget, hours and customers as clickable cards that take you to the matching directory. Further down, the dashboard aggregates rather than lists:

- **Not yet paid** (authorised roles) — the settlement queue: open and invoiced amounts grouped so you can jump straight into billing (chapter 9).
- **Budget Alerts** — projects that crossed the warning or critical threshold configured under **Settings** → **Defaults**; each entry links to the project.
- **Recent Time Entries** — the latest activity across the projects you may see.
- Yearly and project-type analyses — where the hours went, split into billable work and overhead.



Budget Alerts list projects over threshold — click through to act.

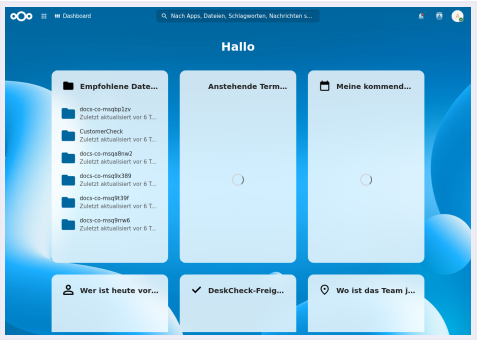


Recent Time Entries show the newest bookings you may see.

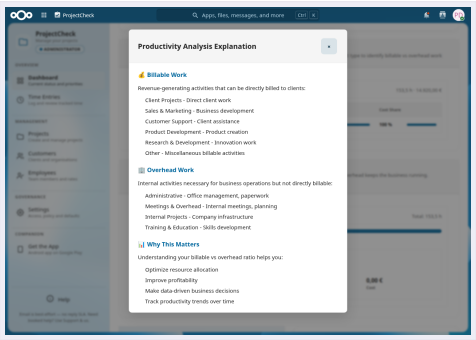
Two quick actions sit top right: **New Time Entry** always, **New Project** only when you may create projects. A productivity info popup on the dashboard explains how the app classifies billable versus overhead project types — the same distinction the type analysis uses.

3.2 The personal view and the desklet

If your role has no global visibility, the same page is a **Personal dashboard**: your hours, your open and invoiced amounts, your recent entries — never a colleague's data. Independently of the app, Nextcloud's own dashboard can show the **My projects** desklet with each project's budget percentage, so a glance at the Nextcloud home page is enough to spot a project running hot.



The **My projects** desklet on the Nextcloud dashboard.



The productivity explainer: what counts as billable work.

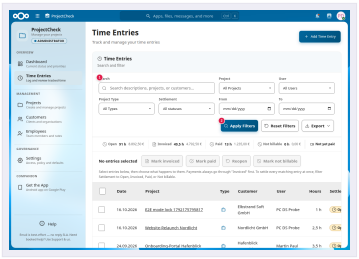
4 Time Entries

Time Entries is where hours enter the system and where they wait for settlement. Every entry carries a project, a date, the hours, an optional description and — computed at save time — the hourly rate that applies on that project and date. Members mostly work with their own entries; project managers and administrators additionally see the team's entries on the projects they may access.

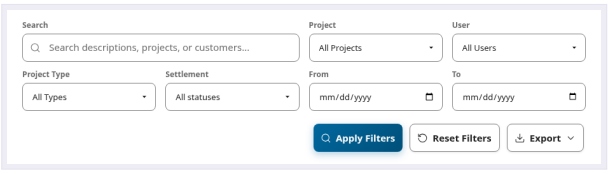
4.1 Finding entries: the list and its filters

The list shows entries newest-first with columns for date, project, person, description, hours and amount. Above it, the filter bar narrows the table by **Search** text, **Project**, **User**, **Project Type**, **Settlement** status and a date range; **Apply Filters** runs the search and the summary line under

the table recalculates hours and amounts for the matches — the answer to “how many hours are still open on Nordlicht this month?” is always two clicks away. Long lists paginate; the page size follows your personal setting or the app default.



Marker 1: the filter fields — marker 2: **Apply Filters**. The totals row below the table always reflects the current filter result.



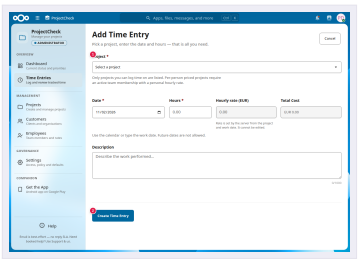
The filter bar in detail.



Pagination at the end of a long list.

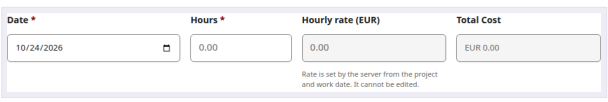
4.2 Logging an entry

1. Choose **Add Time Entry** (or **New Time Entry** on the dashboard).
2. Pick the **Project** — only projects you may book on are listed.
3. Enter **Date** and **Hours**. The form shows the applicable rate and the resulting **Total** while you type.
4. Optionally add a **Description** of the work done.
5. Choose **Save**. You land back on the list with the entry in status **Open**.

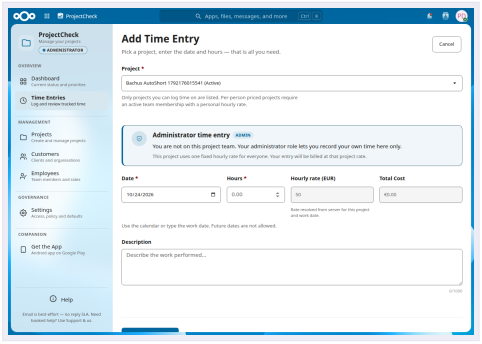


Marker 1: the project field — marker 2: **Save**. Rate and total update live while you type.

Two helpers prevent bad data before it exists. **Budget impact** (expanded under the form) shows how the budget of the chosen project changes with this entry — including the point at which it would overflow. And when an administrator books on a project they do not belong to, a banner makes the override explicit so it never happens silently.



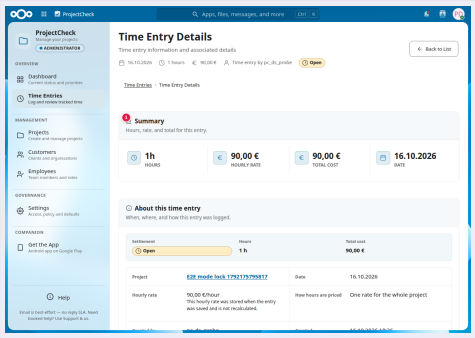
Rate and total while typing.



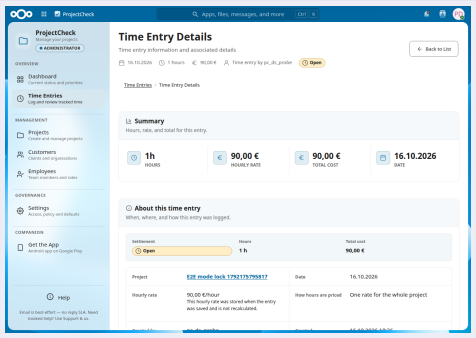
Budget impact: the project after this entry.

4.3 Editing, deleting, and why entries lock

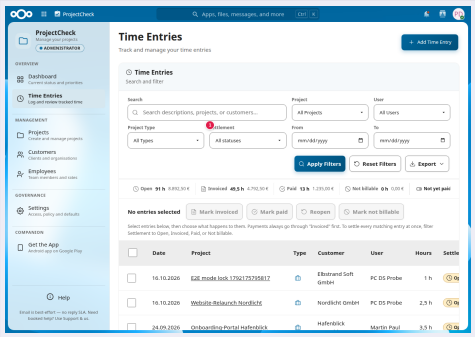
Open entries stay fully editable and deletable from their detail page. The moment an entry is invoiced or paid it *locks*: editing and deleting are refused, the detail page explains **Invoiced or paid entries are locked. Ask a project manager to reopen this entry to change it.** This is deliberate — an invoice must not mutate after the fact. A project manager who genuinely needs a fix reopens the entry, which returns it to **Open** (chapter 9).



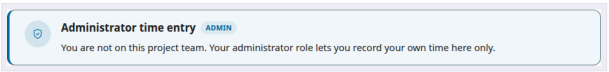
Marker 1: the summary block on a time entry's detail page — status, project and amounts in one place.



Deleting an open entry always asks first — every destructive action in the app does.



Marker 1: filtering the list by **Settlement** = **Invoiced** shows the locked rows.



The override banner when an administrator books outside their own projects.

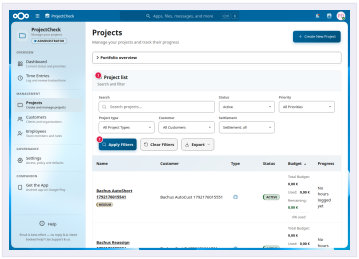
Edge cases. Entries on archived or completed projects stay visible but no longer accept new bookings — the project simply does not appear in the picker. Deleting an open entry asks for confirmation with an in-app dialog (never a browser popup). And a double click on **Save** is harmless: the form is submitted idempotently, so retries and back-button resubmissions never create duplicates.

5 Projects

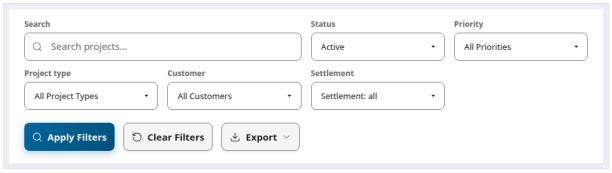
Projects are the centre of ProjectCheck: they carry the customer, a status, an optional budget, a pricing mode, the team, files and every linked time entry. Creating projects and seeing the global portfolio are administrator rights by default; project creators and managers work on the projects assigned to them.

5.1 The list: filters, portfolio, export

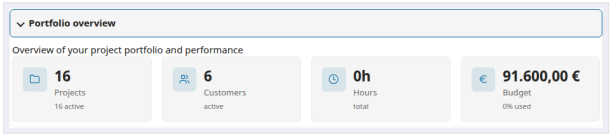
Projects opens on the **Project list**. The filter bar searches by text and narrows by **Status**, **Priority**, **Project Type**, **Customer** and settlement state. Above the table, the collapsible **Portfolio overview** panel aggregates the whole portfolio — counts, budgets and averages across what you may see — and the export menu downloads the filtered result as CSV (chapter 10).



Marker 1: the list heading — marker 2: **Apply Filters**. The portfolio summary sits above the table.



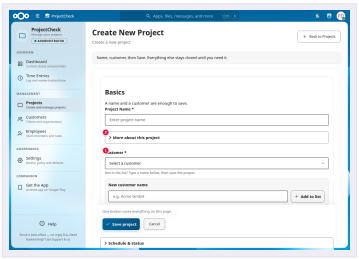
The project filter bar.



The portfolio overview aggregates all visible projects.

5.2 Creating a project

Create New Project deliberately asks little: **Basics** needs only a **Project Name** and a **Customer** — and the **New customer name** field right below creates a missing customer inline, so you never abandon a half-filled form to maintain master data elsewhere. Everything else is progressive disclosure: **More about this project** (descriptions with live character counts), **Schedule & status**, **Budget & timeline**, classification and **Pricing**. Invalid input is flagged inline on the field itself, never as a summary banner at the end.

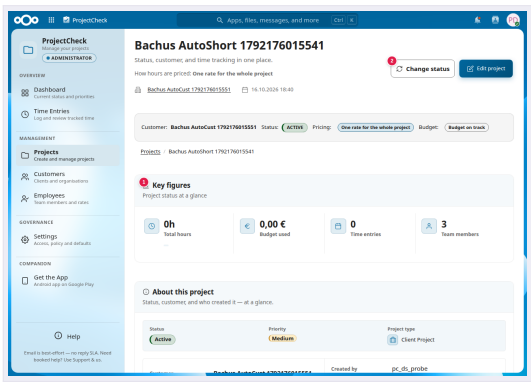


Marker 1: the customer field — marker 2: **More about this project**, the progressive disclosure pattern used throughout the form.

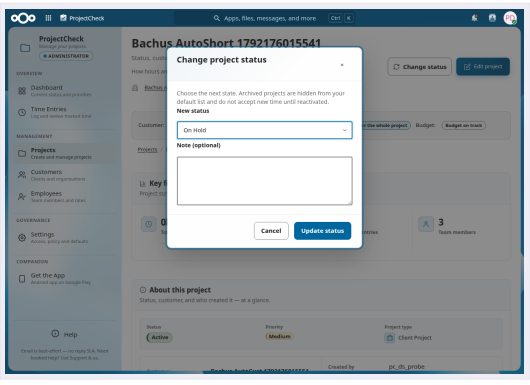
5.3 Status, detail page and files

The status of a project moves through **Active**, **On Hold**, **Completed**, **Cancelled** and **Archived**; changing it opens a small dialog from the project header. Projects in **Active** or **On Hold** accept new time entries — the other states stay fully readable for reporting.

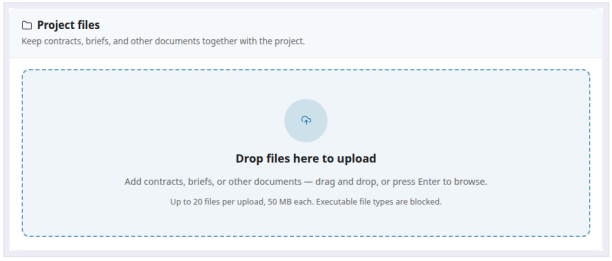
The detail page gathers everything about one project: the **Key figures** strip (hours, budget used, entries, team size), **Budget & timeline** with usage over the scheduled period, the team section (chapter 6), the invoicing block (chapter 9), linked recent time entries, and the **Project files** section. Files upload by drag-and-drop onto the dropzone or a click to browse — contracts, briefs and checklists stay attached to the project they belong to.



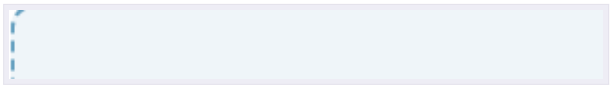
Marker 1: **Key figures** — marker 2: **Change status** in the header.



The status dialog — the same confirm-in-app pattern everywhere.



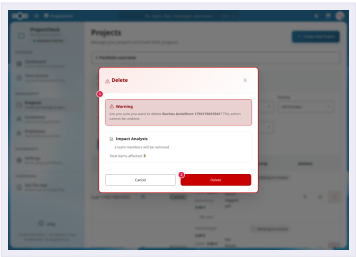
The **Project files** section.



The dropzone: drag files in or press Enter to browse.

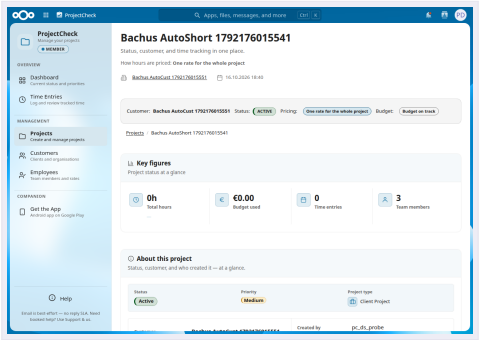
5.4 Deleting with impact

Deleting a project is possible for administrators and the project's own creator — and it is never a blind step. The dialog first analyses the dependencies and lists what disappears with the project: time entries, team links, files. You confirm consciously or keep everything.

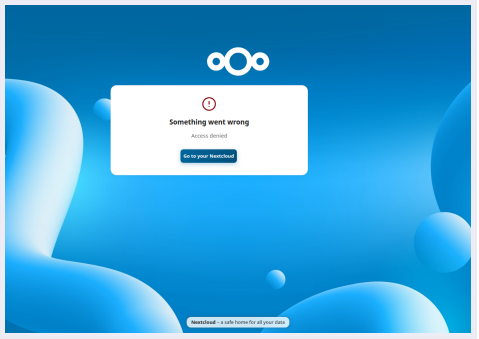


Marker 1: the impact analysis — marker 2: the confirm button. Deleting is a deliberate act, not an accident.

Edge cases. Non-members see a member's reduced detail view without settlement actions. An empty directory shows **No projects found** plus the next action instead of a blank table. A project id that does not exist — stale link, deleted object — lands on a dedicated error page, not on a stack trace.



A member's project view: full information, no settlement actions.



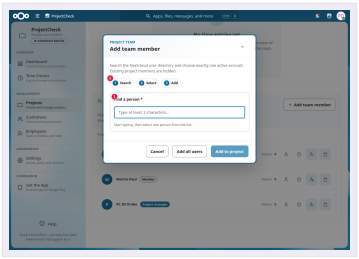
The dedicated not-found page.

6 Team, roles and pricing on a project

A project becomes collaborative through its **Team** section on the project page. The team decides three things: who may log time on the project, who may see and settle the others' hours, and — on per-person pricing — what each hour costs.

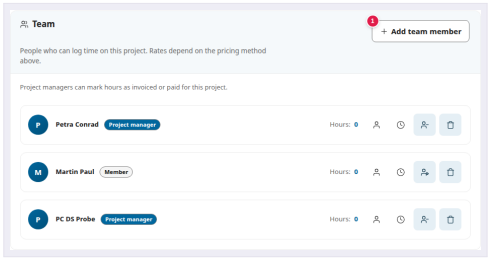
6.1 Adding people and assigning roles

1. On the project page choose **Add team member** in the **Team** section.
2. Type at least two characters into **Find a person** — the dialog searches the Nextcloud user directory and hides people who are already members.
3. Select exactly one account, review the summary, and choose **Add to project**.



Marker 1: the directory search — marker 2: the step list. The dialog walks search → select → add deliberately, so nobody lands on a team by accident.

New members start with role **Member**; promote to **Project manager** in the team list when the person should settle hours on this project. **Add all users** is the shortcut for genuinely everyone — it adds every allowed account in one confirmation and reports how many were skipped because they were already members. Removing someone never deletes their time entries: the hours stay on the project and the person moves to the *former team members* list, so past work remains attributable.



Marker 1: **Add team member**. The team list below shows each person's role and rate.

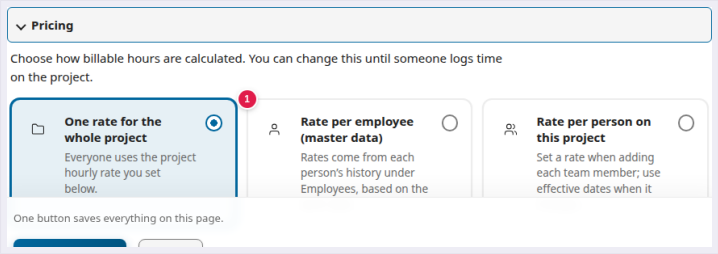
6.2 Pricing modes — how an hour gets its rate

Every project picks one of three pricing modes under **Pricing**, changeable only until the first time entry exists — after that the mode locks so booked amounts never re-derive retroactively.

One rate for the whole project Everyone bills at the project hourly rate set here. Simplest — right for fixed-price work.

Rate per employee (master data) Each person bills at their employee master-data rate (chapter 8) — right when rates follow the person, not the project.

Rate per person on this project Every member gets an individual rate on this project; the **Add team member** dialog then requires a **Hourly rate for this person** before adding — right for mixed-seniority teams.



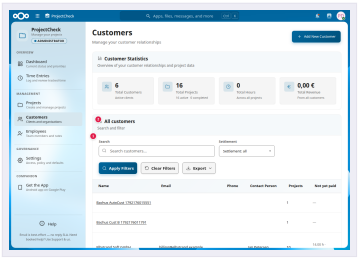
Marker 1: the three pricing modes. The hint explains that the choice locks once time is logged.

7 Customers

The customer directory is the master data that projects, settlement and exports hang from. Create and maintain it as an administrator — everyone else consumes it read-only through projects.

7.1 List, filters and statistics

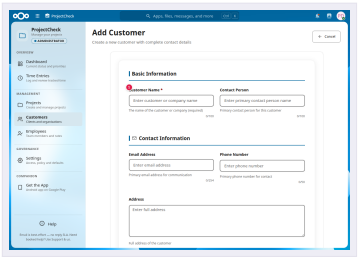
Customers opens with the **Customer Statistics** overview (counts, associated projects, open amounts) above a filterable table. The search field finds names, contacts and addresses; **Apply Filters** narrows by settlement state. As everywhere in the app, the export menu delivers the filtered result as CSV.



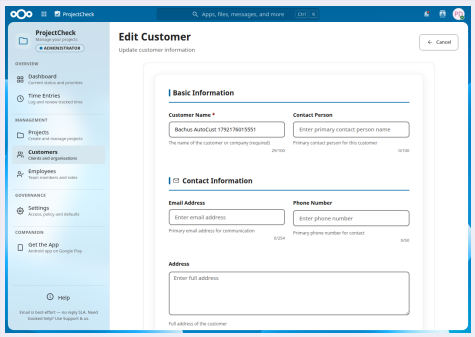
Marker 1: the filter bar — marker 2: the list heading. Statistics sit above the directory.

7.2 Creating and editing

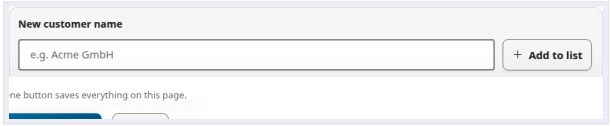
1. Choose **Add New Customer**.
2. Enter **Customer Name** plus optional contact person, email, phone and address.
3. **Save**. The customer is immediately selectable in the project form.



Marker 1: the name field — everything else is optional master data.

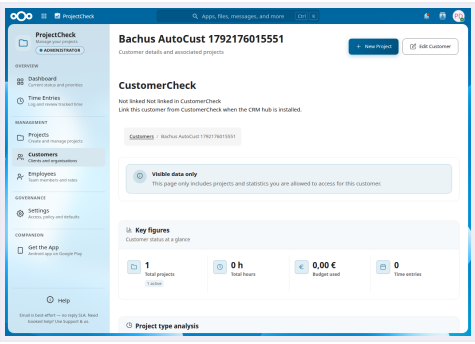


Editing existing master data.

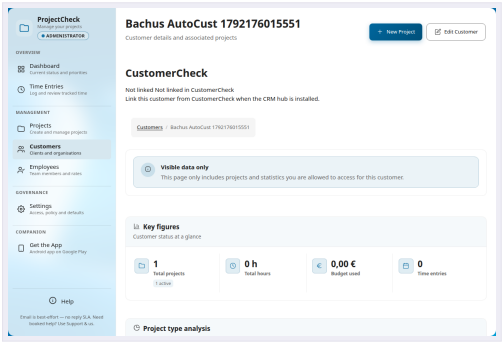


New customer name inside the project form creates a customer without leaving the page.

The detail page aggregates the relationship: **Key figures**, **Year by year** revenue and hours, the **Project type analysis** of the customer's work, master data under **About this customer**, the invoicing block and the list of **Associated Projects**. Non-administrators see only what their role covers — the *visible data* section states explicitly which fields are exposed to whom. If CustomerCheck is installed, a CRM link jumps from the customer into that app.



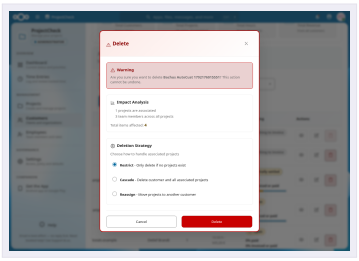
Key figures on the customer detail.



Associated projects with their settlement state.

7.3 Deleting a customer

Deletion follows the same impact-dialog contract as projects: the app first lists the dependent projects and entries, then asks. A customer with history is deleted deliberately — or kept.

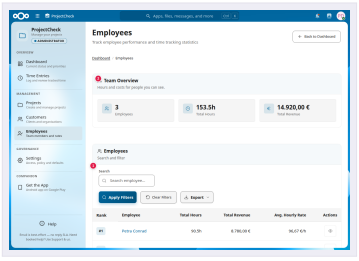


Edge cases. Duplicated names are allowed but searchable — prefer a clear legal name. The empty directory shows **Add your first customer to get started!** with the action built in, so a fresh install never dead-ends.

8 Employees and hourly rates

Employees is the people directory of ProjectCheck: every Nextcloud user who logs time, leads a project or holds a seat. The page answers two questions — who works here, and at which rate. What you see depends on your role: administrators get the full directory with **Team Overview**, members see a scoped view headed **Only your data is shown**.

8.1 The directory



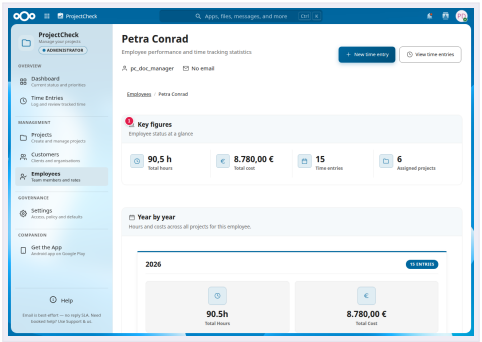
Marker 1: the search and filter bar — marker 2: the statistics header.

Search finds a person by name; each row links to the employee detail. There is no “create employee” — employees are Nextcloud users, and they appear once they log time or join a project team.

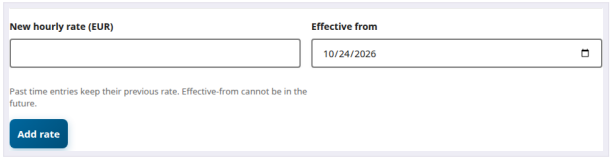
8.2 Rates that keep their history

The employee detail combines **Key figures** and **Year by year** with two working areas: **Project assignments** and the rate history. Project assignments add or remove the person’s projects in one step — the picker offers only projects you may manage and hides existing memberships.

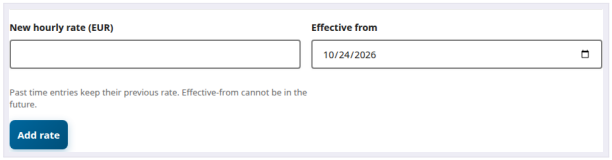
The hourly-rate list is deliberately *append-only*: a new rate takes an amount and an *effective-from* date, never edits a past row. The reason is auditability — a time entry bills at the rate that was effective *on its work date*, and it keeps that stored rate even if the person is re-priced tomorrow. Two rules follow: the effective date cannot be in the future, and two rates cannot share an effective-from date — the app flags both cases inline.



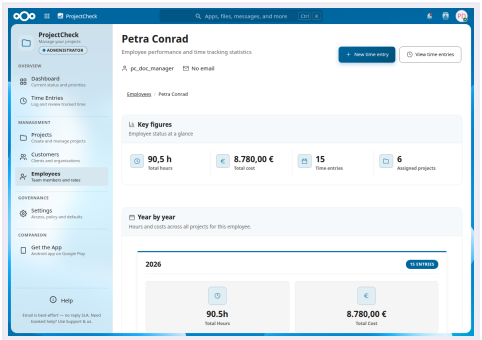
Marker 1: the key-figures strip on an employee’s detail page.



Add rate: amount plus effective-from — history stays untouched.



The append-only rate history.



Assigning a project from the employee side.

Edge cases. Removing a rate does not retro-change billed entries — they keep their stored amount. A person removed from all projects keeps their entries and appears under former members on those projects. And on *rate per employee* projects, a missing effective rate surfaces as a booking hint rather than a silent zero.

9 Settlement: turning hours into invoices

Settlement is the controlled path from a logged hour to a paid one. ProjectCheck deliberately does *not* send invoices anywhere — it manages the lifecycle status of every entry so your invoicing tool (or InvoiceCheck, chapter 11) always works on clean, unambiguous data. Only project creators, project managers and administrators settle; members watch their hours move through the states but cannot change them.

9.1 The lifecycle

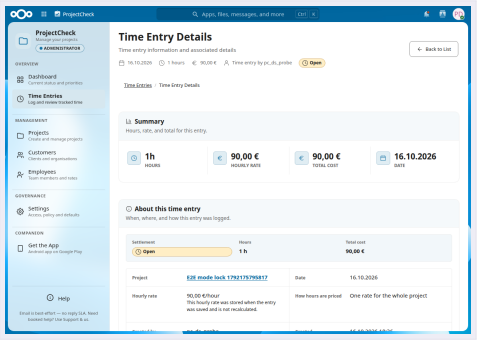
Every entry walks one path: **Open** → **Invoiced** → **Paid**. At any point an entry can instead become **Not billable** — written off but kept for the record — and **Reopen** moves an entry back to **Open** when a correction is needed. Two rules protect the money: payments always go through **Invoiced** first, and an invoiced or paid entry is locked for editing and deleting until reopened. That lock is why invoices never change retroactively.

9.2 Settling one entry

On an entry's detail page, the **Settlement** section offers the allowed next steps for its current state — **Mark invoiced**, **Mark paid**, **Mark not billable** or **Reopen** — each behind a short confirmation. The detail shows the full context (project, person, rate) so you never settle blind.



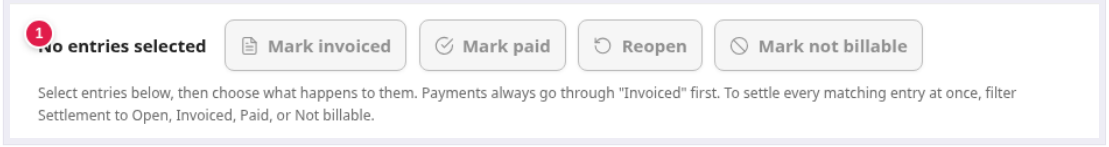
The settlement block on an entry.



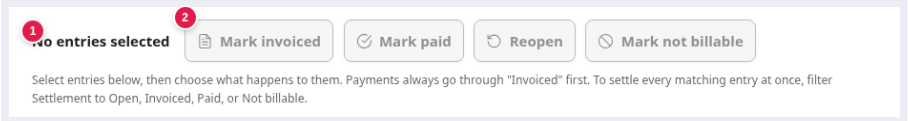
Actions adapt to the entry's state.

9.3 Settling many: the billing bar

On **Time Entries**, checkboxes select entries on the current page; the **Settlement actions for selected entries** bar then offers the target states. Two scopes exist: the selection on this page, or *all matching entries* — every page of the current filter result, up to 500 entries, which is how a monthly close actually finishes in one action. Filter to **Settlement** = **Open** first, and the batch becomes a clean monthly cut.



Marker 1: the selection count — it announces the scope before you commit.

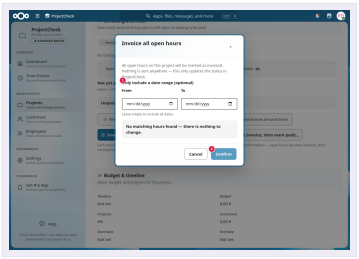


Marker 1: the count — marker 2: the actions. "All matching" settles every filtered page, not just the visible one.

Bulk changes are optimistic-locking safe: entries that changed meanwhile or lost their permission are skipped and reported (“updated, skipped”), never silently overwritten — you re-check exactly those.

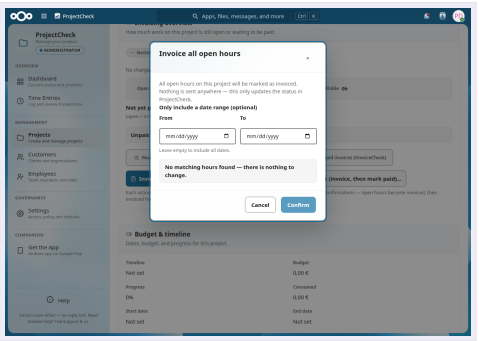
9.4 Settling a whole project

The project page carries the same lifecycle at project level: **Invoice all open hours**…, **Mark all invoiced as paid**… and **Close out (invoice, then mark paid)…**… — each opening the same dialog.



Marker 1: the optional **Only include a date range (optional)** filter — marker 2: **Confirm**.

The dialog previews what will change — **No matching hours found — there is nothing to change.** when the scope is empty — and restricts to a period via **Only include a date range (optional)**. **Close out project hours** is the one-step version for finished projects: invoice everything open, then mark it paid in a single confirmed run.



Restricting a settlement run to a period.



Progress while a larger batch settles.

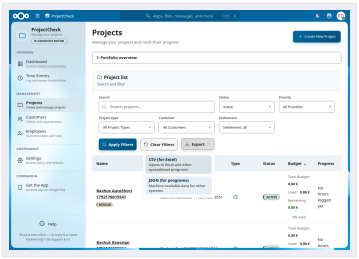
Edge cases. Settling is a status change, not a payment — money moves in your invoicing process, ProjectCheck keeps the ledger clean. Entries a colleague modified in the meantime are skipped and reported, not overwritten. And **Reopen** exists precisely because mistakes happen: it unlocks, you fix, you settle again.

10 Exports, files and backup

ProjectCheck keeps your data on your instance — and hands it out in open formats whenever you need it elsewhere. Three different “out of the app” paths exist, and they are easy to confuse: list exports for humans, project files for documents, and update backups for administrators.

10.1 CSV exports of the lists

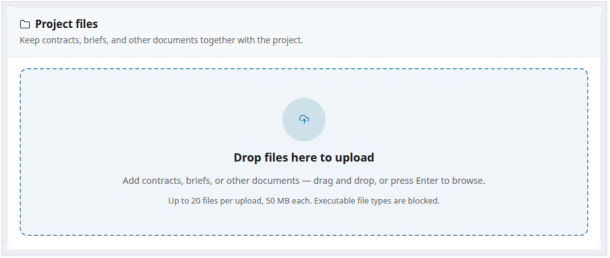
Every directory table — projects, customers, employees, time entries — carries an **Export** menu. The export always honours the *current filter*: narrow the list first, then export, and the CSV contains exactly the rows you saw. Files open directly in any spreadsheet (semicolon-separated, decimal separator follows the app locale) and are suitable for payroll hand-offs, customer statements and pivot analysis.



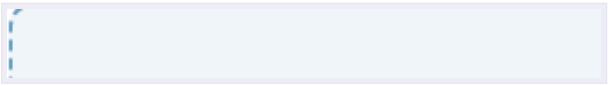
Customer-controlled text is written exactly as stored. Treat any spreadsheet import from an untrusted instance with the usual care — the export reflects the data, it does not audit it.

10.2 Project files

The **Project files** section on each project keeps the documents that belong to the work — contracts, briefs, checklists. Upload by drag-and-drop onto the dropzone or by keyboard (Enter opens the file picker); download and delete use the row actions. Files live inside ProjectCheck's project scope, separate from your Files app, so a project archive can never scatter.



The file list on a project.



The dropzone accepts drags and keyboard input.

10.3 Update backups for administrators

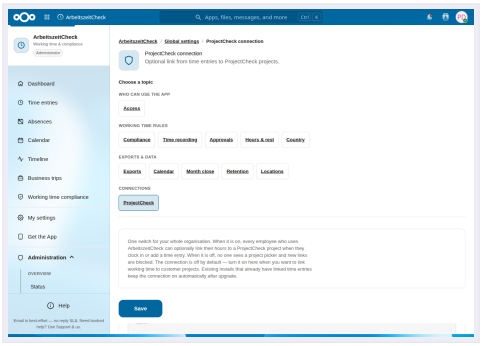
Before every app update, ProjectCheck snapshots all of its own tables — a restore point if a migration ever misbehaves. On the console, `occ projectcheck:upgrade-backup create --reason="before quarter-end"` takes a manual snapshot at any time, `list` shows what is stored, and `restore --latest --force` (or `--id=`*`snapshot-id`*) rolls back. Background jobs pause automatically while a restore runs, so nothing writes into a half-restored state.

11 Working with ArbeitszeitCheck and InvoiceCheck

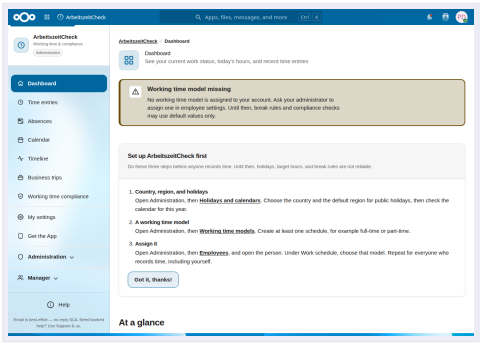
ProjectCheck is deliberately small in one direction: it manages customers, projects, hours and settlement state — and hands the actual invoicing and attendance work to its sister apps when they are installed. All three run independently; the integrations are links, not dependencies, so nothing breaks when one app is absent.

11.1 ArbeitszeitCheck: attendance feeds the hours

When ArbeitszeitCheck is installed, its work-time tracking supplies the people layer — the dashboard and settings link across both apps so recorded attendance and billable project hours stay comparable. A settings link opens the connection directly.



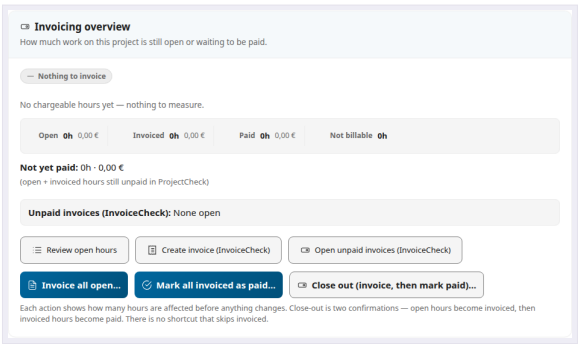
The connection point in ArbeitszeitCheck's settings.



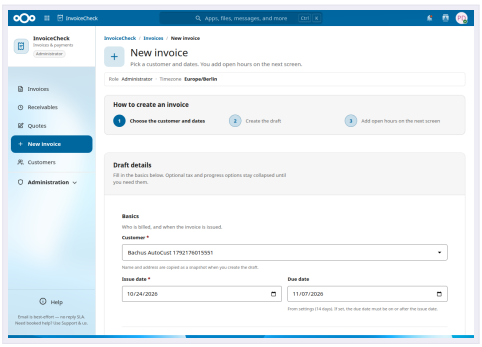
The ArbeitszeitCheck dashboard — attendance next to project hours.

11.2 InvoiceCheck: settlement becomes invoices

With InvoiceCheck installed, a project's settlement state becomes actionable: the invoicing block on the project page links into InvoiceCheck, and a draft invoice can be started with the customer and project already filled in. ProjectCheck stays the source of truth for *which* hours are invoiceable — InvoiceCheck turns them into a document.



InvoiceCheck links inside the project's invoicing block.



An invoice draft started from the project context.

11.3 Nextcloud dashboard widget

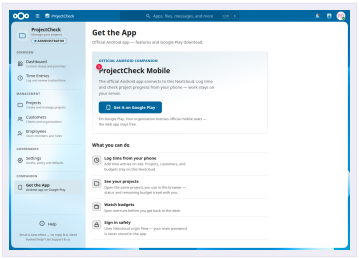
Independent of both, the **My projects** desklet for the Nextcloud home page shows each visible project's budget percentage — the fastest early-warning surface in the suite.

12 The mobile companion (bordered)

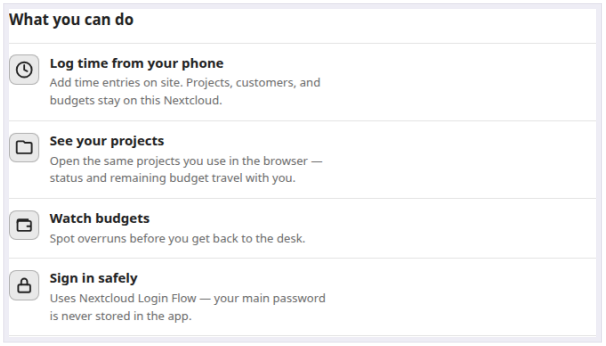
The ProjectCheck web app is free (AGPL) and needs no licence — that stays true on every page of this manual. The optional Android *companion* is the licensed part: it logs time on site against the same projects, budgets and settlement states that live on this Nextcloud, and it queues entries offline until the device is back online.

12.1 What the companion is — and is not

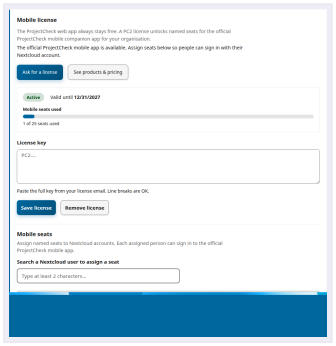
Get the App in the navigation opens the companion page: what it does, where it installs from, and which licence state your instance is in. The page also lists the features — time entry on the go, project and customer context, settlement-aware views — without duplicating this manual.



Marker 1: the companion page. The web app stays AGPL; licences cover mobile seats only.



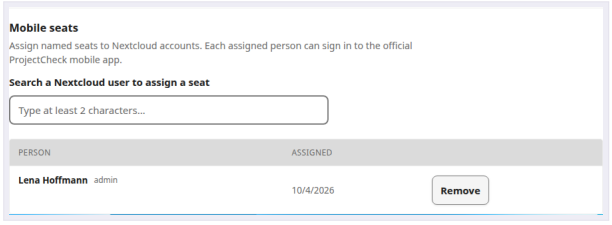
What the companion can do.



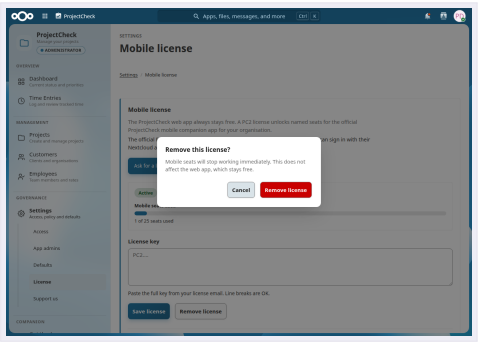
The licence state under **Settings** → **License**.

12.2 Licences and seats

Licences carry the PC2 prefix and cap a number of *seats*: named Nextcloud accounts that may sign in to the companion. Administrators apply a key under **Settings** → **License**, then assign seats to accounts; the seat meter shows used versus total and warns before expiry (**Active — renew soon**). When every seat is taken the app says so plainly — **All licensed seats are assigned. Remove a seat or upgrade the license.** Removing the licence itself goes through a confirm dialog and frees the seats.



Seat assignment and the seat meter.



Removing the licence is a confirmed, deliberate step.

12.3 Offline behaviour at a glance

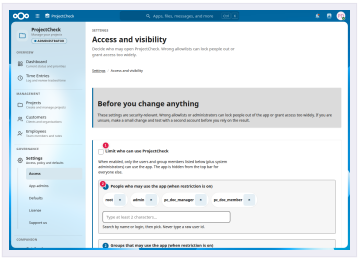
The companion tolerates dead zones: entries save *on the phone* first and upload when the network returns (**Saved on this phone. It will sync when you are back online.**, **Sync now**). Queued entries show **Waiting to sync** until they land — web users see them only once they have synced, which is why a field entry can legitimately appear in the web list a day late.

13 Access: the door into the app

The access door decides who may open ProjectCheck at all — before any project role comes into play. It lives under **Settings** → **Access** and answers exactly one question: *is the app open to every account, or only to an allowlist?*

13.1 Open versus restricted

By default the door is open: every Nextcloud account can use the app. Enable **Limit who can use ProjectCheck** and the app fails closed — only the listed people and group members, plus system administrators, get in. Two pickers build the list: **People who may use the app (when restriction is on)** and **Groups that may use the app (when restriction is on)**, both searching the directory as you type.



Marker 1: the restriction toggle — marker 2: the people allowlist.

Three deliberate protections are worth knowing. The notice above the form states the risk up front: *wrong allowlists can lock people out*. While the restriction is on, a warning banner on the page itself reminds you that unlisted users are locked out *right now*, including this page if your own account is affected. And the app does not merely deny access politely — without membership the **ProjectCheck** icon disappears from the Nextcloud app bar entirely, so a denied user is not teased by an entry point that leads nowhere.



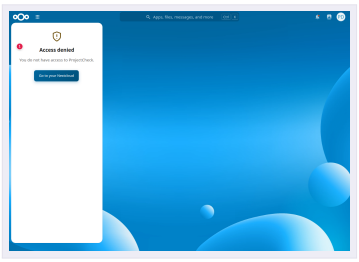
The group allowlist.



The “before you change anything” notice — read it before flipping the toggle.

13.2 What a denied user sees

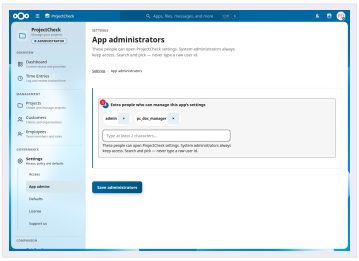
A denied user who reaches the app anyway — bookmark, direct link — lands on a dedicated page: **Access denied**, a plain explanation, and **Go to your Nextcloud** back to safety. No half-rendered app, no leaked project names.



Marker 1: the denied page — clear state, clear way back.

13.3 App administrators

Beside Nextcloud system administrators, **Settings** → **App admins** names additional people who may manage this app’s settings — the same directory picker, the same explicit model. App administrators control settings only; project content still follows the project roles of chapter 1.



Marker 1: the app-admin list.

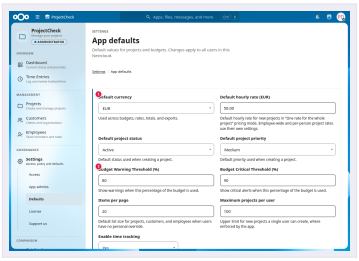
Edge cases. Test a new allowlist with a second account before you rely on it — the settings page says the same. Removing yourself is possible in theory but pointless: system administrators can always re-enter and repair. Group changes apply on next login, not retroactively mid-session.

14 Settings

Settings is the administrator's workshop, split into one page per topic: **Access** (chapter 13), **App admins**, **Defaults**, **License** and **Support us**. A reminder on every page keeps the stakes honest: these settings are security-relevant, so change a little and verify.

14.1 Defaults: the workspace's ground rules

Defaults sets the values every project and list inherits: **Default currency** for all amounts, the default hourly rate for *one-rate* projects, the default project status and priority for new projects, list page size, a per-user project cap, and feature toggles for time tracking, customer management and budget tracking. Two thresholds drive the early-warning system: **Budget Warning Threshold (%)** and **Budget Critical Threshold (%)** — the dashboard's **Budget Alerts** light up exactly here.



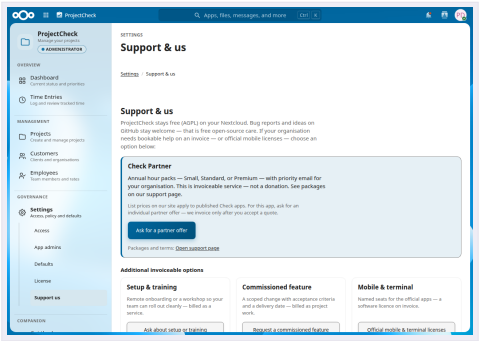
Marker 1: the currency — marker 2: the warning threshold.

14.2 License and seats

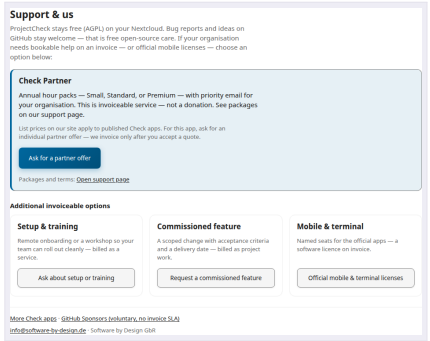
License manages the mobile licence (key, status badge, valid-until) and its named seats — covered with the companion in chapter 12. The web app itself needs no licence.

14.3 Support us

Support us keeps the web app honestly free and the options honest: bug reports and ideas via GitHub stay welcome at no cost, while bookable help — setup assistance, annual hour packs, commissioned features — is offered as invoiceable service, clearly separated from a donation.



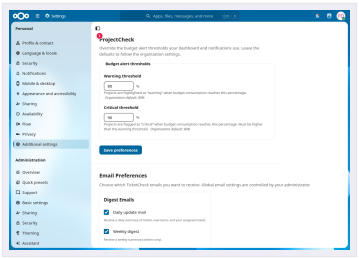
The support page.



The bookable support packages.

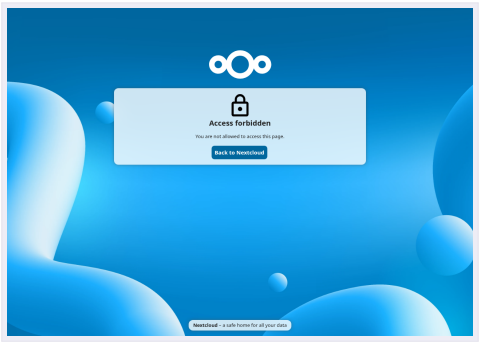
14.4 Personal preferences and the Nextcloud panels

Each user adjusts their own *personal* hints under Nextcloud's personal settings (*Settings* → *Additional settings*) — preferred budget thresholds and display details that override the app defaults without touching anyone else's workspace.



Marker 1: the personal ProjectCheck panel inside Nextcloud settings.

Nextcloud administrators additionally see a small ProjectCheck panel in the administration settings — instance-level information, distinct from the in-app settings above.



The Nextcloud-side admin panel.



The settings section navigation.

Update backups. Before every app update the app snapshots its own tables automatically; `occ projectcheck:upgrade-backup list|create|restore` manages the snapshots manually (chapter 10).

15 Troubleshooting and FAQ

15.1 Common situations, cause and fix

Access denied The restriction is on and your account is not on the allowlist — this is intended, not a bug. Fix: ask an administrator to add you or your group (ch. 13).

The app icon is missing entirely Same door, seen from outside: when the allowlist excludes you, the icon is hidden so you never meet a dead end.

"Project not found" or a similar not-found page The object was deleted or you may not see it. All missing and forbidden objects land on the same uniform page on purpose — a list of projects you *do* see is under **Projects**.

A time entry refuses to edit or delete It is settled (**Invoiced**/**Paid**) and therefore locked. Fix: a project manager uses **Reopen** on it (ch. 9).

The settle actions are missing Settling needs creator, project manager or administrator rights on that project — check your badge and the team list (ch. 1).

No matching hours found — there is nothing to change. The settle scope is empty — all matching entries are already in the target state, or the date range excludes them. Re-check the **Settlement** filter.

"Skipped" rows after a bulk settle Those entries changed meanwhile or lost permission — reopen the filter and review them one by one; nothing was silently overwritten.

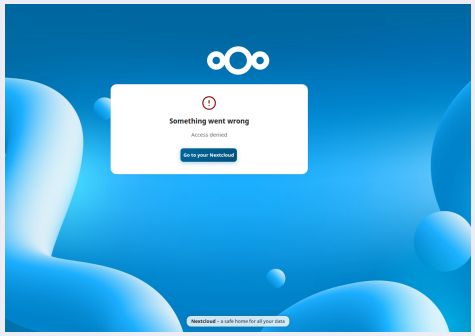
Settings is missing Only app and system administrators see the section — check the badge under the app name.

My dashboard shows only my own data That is the **Personal dashboard** — correct for members. Global metrics belong to roles with global visibility.

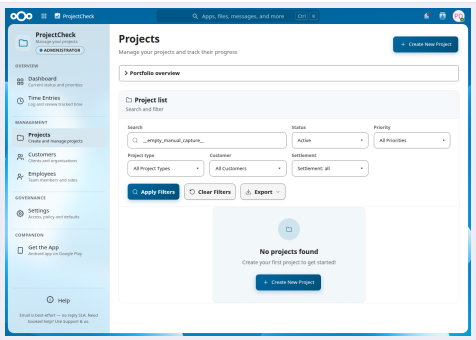
A person cannot be added to a team The picker hides existing members and accounts excluded by the access door. Check both first.

A field refuses input Field-level messages appear *under the field itself* — read the inline note; a missing rate on a per-person project, an impossible date or a duplicate effective-from are the classics.

An empty list where data was expected Check the filters first — a stale **Search** term or a restrictive **Settlement** filter is the usual cause. Truly empty directories say so explicitly and offer the next action.



The uniform not-found page — same for missing and forbidden objects.



An honest empty state with the next action.

15.2 “How do I…” — the index

…log my hours? ch. 4, step *Logging an entry*.

…fix a wrong entry after it was invoiced? ch. 9 — **Reopen**, correct, settle again.

…close out a finished project? ch. 9 — **Close out (invoice, then mark paid)…**.

…add someone to a project? ch. 6 — **Add team member**.

…change what an hour costs? ch. 6 pricing mode, ch. 8 rate history.

…create a customer while inside the project form? ch. 7 — **New customer name**.

…export a month for payroll? ch. 10 — filter first, then **Export**.

…let more people in? ch. 13 — the allowlists.

…see where a budget went? ch. 3 alerts, project **Budget & timeline**.

…use the app on a phone? ch. 12 companion, or the **Menu** drawer in the browser.

15.3 Companion offline (border)

The optional companion queues work without network and reports plainly: **No internet connection** on a dead link, **Saved on this phone. It will sync when you are back online.** when queueing, **Waiting to sync** until upload, **Sync now** to retry, and a confirmation once queued entries land. If a web user misses a field entry, that queue is the reason — not a lost entry.

16 Accessibility

ProjectCheck aims at WCAG 2.1 AA on every page — accessibility is a feature, not an afterthought.

- **Keyboard**: every flow works without a mouse — the navigation drawer, the people pickers, the file dropzone (Enter to browse), the dialogs. Focus moves into a dialog when it opens and back to its trigger when it closes.

- **Never colour alone**: states always carry text — billing chips, budget alerts, role badges all read aloud.
- **Screen readers**: landmarks, labelled fields and live regions; the selection count on the billing bar announces itself, and combobox suggestions are announced as they appear.
- **Field-level errors**: invalid input flags the field itself (`aria-invalid` plus the message under it), never a bare banner at the page top.
- **Dialogs**: native in-app dialogs replace browser `confirm`/`prompt` everywhere, so destructive steps are describable, focusable and translatable.
- **Motion and contrast**: reduced-motion preferences are respected; text meets AA contrast on the app's slate canvas.
- **Target sizes**: controls meet 44 px minimum, primary and dangerous actions 48 px.
- **Tables**: on narrow screens, tables reflow into labelled cards rather than scrolling sideways.

If something blocks you, that is a bug worth reporting — `dev@software-by-design.de` reaches the team directly, and the **Help** footer offers **Report a problem** with the technical details pre-filled.

17 Glossary

Allowlist The named users and groups who may open the app when **Limit who can use ProjectCheck** is on.

App administrator A non-system-admin allowed to manage ProjectCheck's settings — named under **App admins**.

Billing status The lifecycle state of a time entry: **Open**, **Invoiced**, **Paid** or **Not billable**.

Budget A money cap on a project; consumed by billed amounts, watched by the dashboard's **Budget Alerts**.

Close out The one-step project settlement: invoice everything open, then mark it paid.

Companion The optional licensed Android app for logging time on site; the web app needs no licence.

Customer An organisation the work is billed to; master data behind projects and exports.

Employee A Nextcloud user who logs time or leads a project; carries master-data hourly rates.

Impact dialog The confirmation that lists what a delete will take with it — dependencies first, decision second.

Locking The state of invoiced/paid entries: read-only until a project manager reopens them, so settled numbers never mutate.

Not billable The written-off state: kept for the record, never invoiced.

PC2 key The licence key format for the mobile companion; applied under **Settings** → **License**.

Pricing mode How a project prices an hour: one project rate, per-employee master rate, or per-person project rate.

Rate history The append-only list of a person's rates by effective-from date; entries keep the rate effective on their work date.

Seat A named licence slot that lets one account sign in to the companion.

Settlement The controlled status change of hours from open to invoiced and paid — a ledger state, not a payment.

Team The people attached to a project, each with a role: **Member** or **Project manager**.

Update backup The automatic snapshot of the app's tables before every app update; restorable via `occ`.

18 Feature catalogue

Every documented feature at a glance — with the chapter that covers it.

Dashboard Metric strip, **Not yet paid**, **Budget Alerts**, recent entries, yearly and type analysis, personal variant, productivity explainer — ch. 3.

Navigation Role-aware sidebar, **Menu** drawer on narrow screens, **Help** footer — ch. 2, 3.

Time Entries List with filters and totals, create/edit/delete while open, locked after invoicing, rate and budget preview, idempotent save — ch. 4.

Projects Filters, portfolio panel, create with quick-customer, status lifecycle, detail with key figures/budget/files/team, impact-delete — ch. 5.

Team Directory picker, member/manager roles, add-all, former members, per-person rates — ch. 6.

Pricing Three pricing modes, locked after first entry — ch. 6, 14.

Customers Statistics, filters, quick-create, detail with key figures/yearly/projects, impact-delete — ch. 7.

Employees Scoped directory, project assignments, append-only rate history — ch. 8.

Settlement Open/Invoiced/Paid/Not billable + Reopen, per-entry actions, page and all-matching bulk, project settle dialog with date range, close out, change-skip reporting — ch. 9.

Exports Filtered CSV on every directory — ch. 10.

Project files Dropzone upload, download, delete — ch. 5, 10.

Update backup Auto snapshot + `occ projectcheck:upgrade-backup` — ch. 14, 10.

Sister apps ArbeitszeitCheck links, InvoiceCheck drafts, NC desklet **My projects** — ch. 11.

Companion Get the App page, PC2 licence, seats, offline queue — ch. 12.

Access door Open/restricted, user+group allowlist, NavGate hiding, denied page, app admins — ch. 13.

Settings Access/admins/defaults/license/support sections, personal prefs, NC admin panel — ch. 14.

Safety Uniform not-found page, impact dialogs, in-app confirms, field-level errors, idempotent forms — ch. 15, 16.

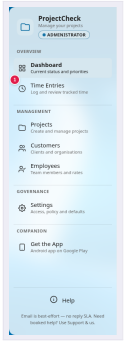
Accessibility WCAG 2.1 AA — ch. 16.

Shortcuts by role

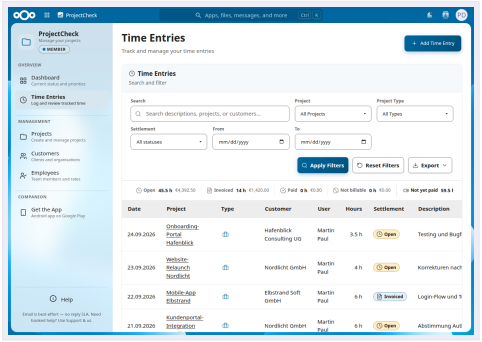
Administrator **Access/Defaults** → customers → projects/team/rate → review time entries → billing → licence/support.

Project manager Dashboard **Not yet paid** → filter team time entries → invoice/paid → project detail.

Member **Time Entries** → **Add Time Entry** → maintain own list; no settlement, no settings.



Admin navigation including settings.



Member time tracking without team settlement.

About Software by Design

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