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3 Working with Projectile - Basic Functions

This section deals with the general operation and basic functionality of Projectile using practical examples.

1.

User Interface:

- User Interface, Login, Change Password, Logout
- Create, Edit and Delete Files
- Transfer Record to the Dock Bar
- Search and Find Data
- Main Menu, Hit List and Work Area

2.

CRM:

- Contacts, Divide Contacts
- Contact Person and Create Actions
- Manage Sales Funnels

3.

HR:

- Activities
- Employees. Employee Contract and Time Bookings
- Units
- External & Abstract Employees

4.

Project Planning:

- Project Plant from Sales Funnel and Project Application
- Manual Project Creation and Definition
- Project Structuring, Process and Schedule Planning, Resource Planning

5.

Calculation, Offers, Orders and Project Release:

- Calculation and Offer Management
- Order Management
- Project Release

6.

Templates, Construction Kit:

- Project Templates
- Project Construction Kit

7.

Time Tracking, Reporting:

- Time Tracking (TimeTracker)
- Request and Record Absences
- Report of Work Packages, Free Work Packages, Period-End Closing
- Billable Expenses, Remaining Expenses and Percentage of Completion
- Risks, Status Report and Change Request

8.

Cost Tracking, Billing and Project Completion:

- Order and Incoming Invoice
- Travel, Drives, Receipts, Article Sales
- Contract and Outgoing Invoice
- Project Completion

9.

Standard Reports:

- Simple Standard Reports
- Universal Standard Reports

10.

Report Generator:

- Report Generator
- Query Manager
 - Structure and Syntax of the Queries
 - Structure of the Query Manager
 - Creating Queries
 - Set Rights
 - Combination of Queries
- Report Designer
 - Tabular Reports
 - Set Rights
 - Periodic Reports, Key Figures
- Dashboard Builder
- Exports with an Excel Template
- Run Queries in the Background

11.

Portals:

- Portals
- Creating Portals (Query)

- Creating Portals (Evaluation)
- Creating Portals (Funktionalität)
- Manage Templates

12.

Tickets & Kanban:

- Tickets (Change Requests)
- Editing Tickets
- Ticket Overview
- Kanban Boards
 - Configuration of the Kanban Boards
 - Working with Kanban Boards
 - Project Kanbans

13.

Purchasing & Procurement:

- Article and Product Group
- Parts Lists
- Articles and Parts Lists in the Budget
- Ordering Articles/Parts Lists
- Stock Management
- Recording of Quantities, Invoicing

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