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3.03 Forms and Form Elements

Projectile consists of many forms. The example displays a project form. All forms in the system, excluding the charts and the TimeTracker, are built in the same manner.

Project 3 Introduction Projectile

Master data | Involved persons | Portfolio | Status | Budget | Financial data | Order data | Documentation | Misc

Project number: Number **Status:** Closed live

Description:

Project start/end date: From To

Parent project:

Subprojects

	Number	Description	Status	Begin planning	End planning
1	3.1	Introduction Accounting	Closed live	09.06.2009	30.11.2009
2	3.2	Projectplanning	Closed live	09.06.2009	30.11.2009
3	3.3	Implementation	Closed live	15.08.2009	16.10.2009

Processes

	Process number	Description	Begin date planning	End date planning
1	3-1	Conception for combining Projectile and SAP CO/FI	09.06.2009	30.11.2009
2	3-2	Installation Projectile	09.06.2009	30.10.2009
3	3-3	Programming 4-3	09.06.2009	30.10.2009

Milestones

No entries

Grade of completion

	Number	State
1 %	3-A	75,00

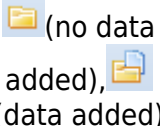
The form bar consists of elements used for closing the document  and for accessing the online help  :

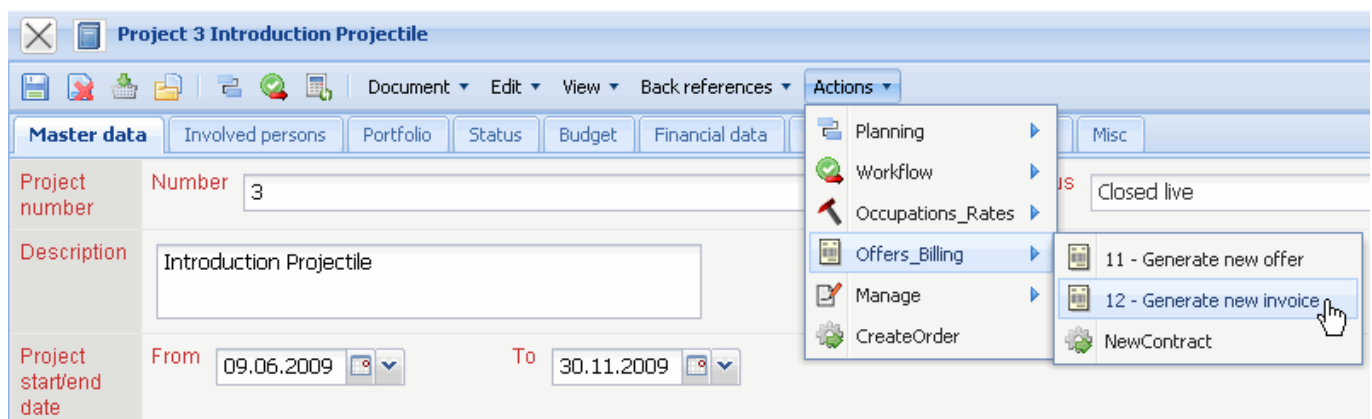
Project 3 Introduction Projectile

Beneath the form bar is the menu bar for administering the data in the form (data record). Not all functionalities are always visible. Some of the functionalities are also stored in the menu bar of the form:

Document Edit View Back references Actions

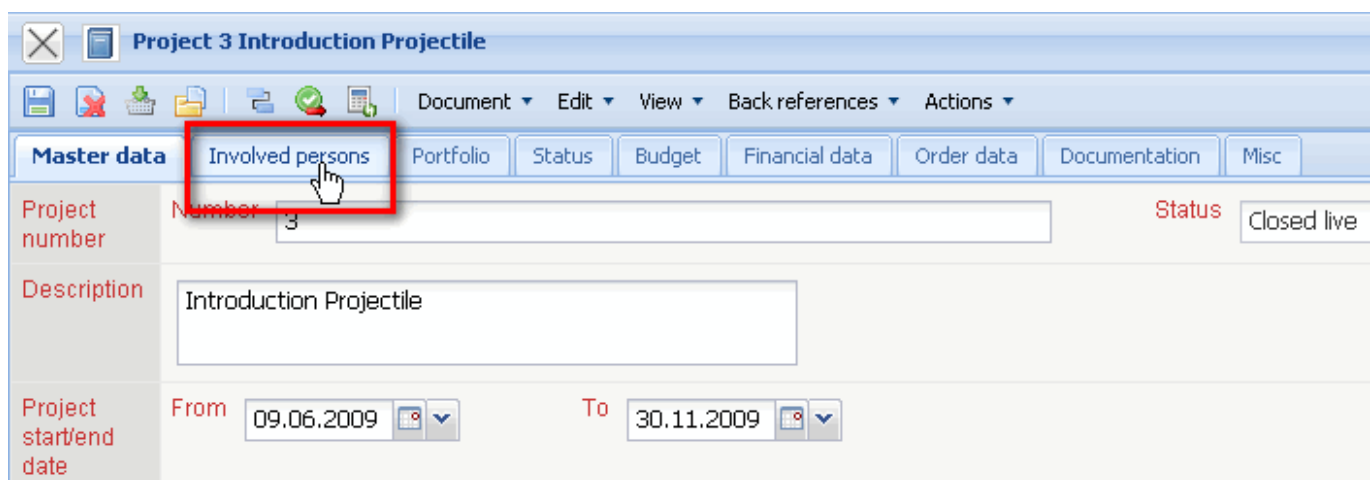
	Create new document from this template
	Save the document

	Copy the document
	Delete the document (including all linked documents)
	Show document in navigator
	Copy this document to clipboard (see also chapter 3.02.1 Personal Clipboard)
	Further information for document (Additional information)
	Properties of the document which refer to the access rights (see Administration guide)
	History of the document (see also chapter 3.07.2 History)
	Check plausibility of the document
	Reload the document
 (no data added),  (data added)	Optional component "Flyer" for data administration within the system (see also chapter 3.04.2 Document Administration "Files")



The screenshot shows the 'Project 3 Introduction Projectile' form. The 'Actions' menu is open, displaying a list of actions: Planning, Workflow, Occupations_Rates, Offers_Billing, Manage, and CreateOrder. The 'Offers_Billing' sub-menu is also open, showing '11 - Generate new offer' and '12 - Generate new invoice'. The form fields include 'Project number' (3), 'Description' (Introduction Projectile), and 'Project start/end date' (From 09.06.2009 To 30.11.2009).

Several forms have tabs. The tabs structure the forms better and provide a better overview, especially for forms with many elements. The tabs can be configured in the xml templates by the administrator (see Administration Guide).



The screenshot shows the 'Project 3 Introduction Projectile' form with multiple tabs: Master data, Involved persons, Portfolio, Status, Budget, Financial data, Order data, Documentation, and Misc. The 'Involved persons' tab is highlighted with a red box and a mouse cursor. The form fields include 'Project number' (3), 'Description' (Introduction Projectile), and 'Project start/end date' (From 09.06.2009 To 30.11.2009).

To change tabs, click on the tab.

Project 3 Introduction Projectile

Document ▾ Edit ▾ View ▾ Back references ▾ Actions ▾

Master data

Involved persons

Portfolio

Status

Budget

Financial data

Order data

Documentation

Misc

External order / project

☒ Customer

TLC Telecommunications Corpor

Contact

Williams George

Unit

Cambridge

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