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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**

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**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  :

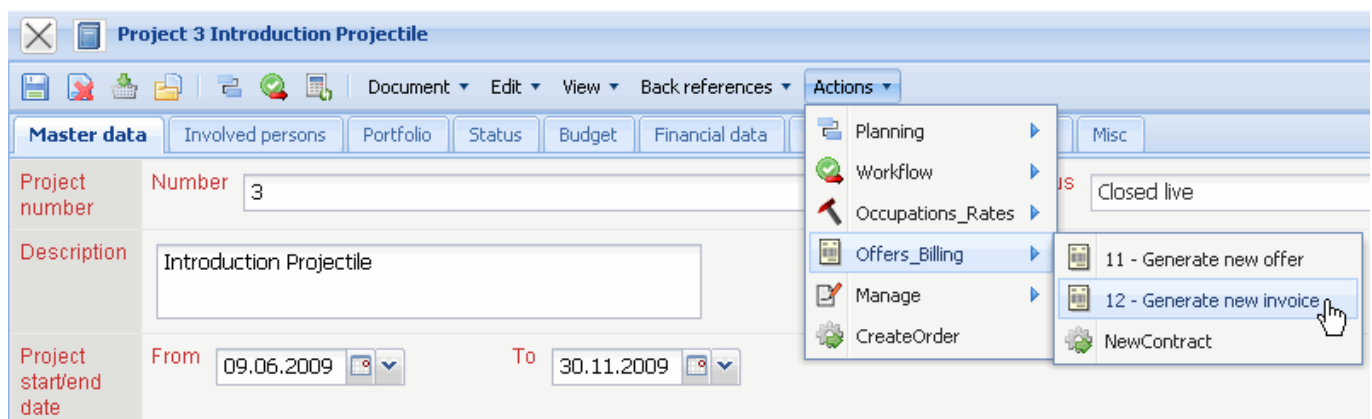
Project 3 Introduction Projectile

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

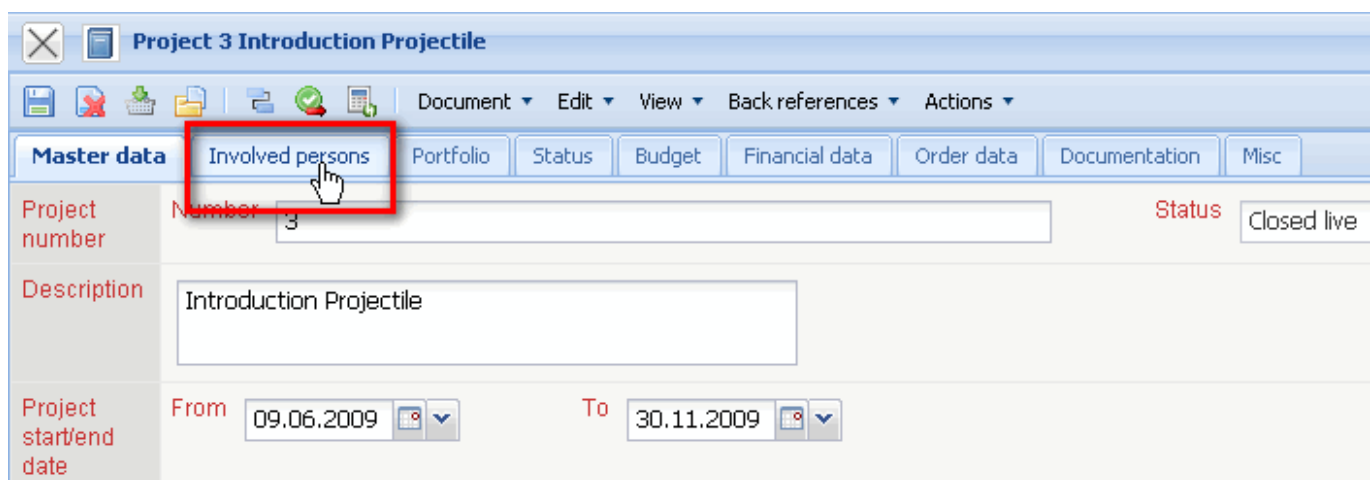
|                                                                                     |                                        |
|-------------------------------------------------------------------------------------|----------------------------------------|
|  | Create new document from this template |
|  | 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 <a href="#">3.02.1 Personal Clipboard</a> )                                                   |
|                                                                                                                  | 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 <a href="#">History</a> )                                                                             |
|                                                                                                                  | 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 <a href="#">3.04.2 Document Administration "Files"</a> ) |



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' (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 tabs. The tabs are: 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' (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

... Continue

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