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3.11 Basic Data Administration

3.11.01 System Data Administration

Various document types in the system contain the global system parameters, and thereby affect the behavior of the entire application. The system documents configuration and system always consist of a document. If a parameter for the company's location changes for example, only the relevant field must be changed. Using timed action, defined or free timed actions can be defined for the automation of Projectile.

Configuration

In the document type configuration, the global parameters settings for the company are defined. This site includes location of the Projectile version, the country of the company, the language and the local currency and the foreign currency of the company, the km-flat rates for business trips and travel rates, terms of payment, reference values for meals (see also document type travel) and surcharges.



A calendar entry must be defined for the location of the company (see also calendar). Furthermore, site-specific legal/bank holidays should be entered (note: regard regional differences). The country of the company is typically used for defaults in various documents (for example for the element VAT). The element for selecting a default language is the preparation of a multilingual version and is currently without functionality. The elements location, country and language can be administered in collections.

The fields local currency and foreign currency specifies the local currency and the desired alternative currency for the entire system. These currencies are required for the elements of type "currency" (see also chapter 3.03), which show and administer two currencies for the currency fields and amount fields. The currencies are administered in the document type currency.

The external and internal kilometer flat rates is for determining travel expenses and for the further charges for the company's own invoices. These rates define the cost per driven km (internal) and the planned amount for the further charges (external). This is similar for the travel-occupation rates. These rates, however, refer to the travel time and not of the driven route. Also, it is also possible to define a kilometer rate for passengers. This rate is relevant if employees do business travel with their own car and further persons from the company drive with them.

The element payment period is applied as term of payment in the invoice document (see also invoicing module).

The values of the meals are necessary for travel expenses. If an employee stays overnight at a hotel at the expense of the company and a meal is noted on the invoice (for example, bed and breakfast), these meals are considered a financial benefit.

The system can either be used for the internal time accounting surcharges or in relation to the further charges in the invoices. (Note: this is standard functionality only with version 2.1 and later).

System

In the document type system, the system settings are defined for the company's Projectile installation. These fields are, with approval of the customer, defined before installation.

System invoices	
☐ Document ▼ Edit ▼ View ▼ Back references ▼	
Invoice path	invoices
Display option	RTF
Travel option	
Track work time in time tracker	V
Duration option	Hours
Tolerance	2 %

The path for the invoice documents are not applied with version 2.5 and later.

In the drop-down box "display option" the type for generating the documents for offers, invoices and reminders are defined. An HTML file or RTF file can be selected for generating the documents.

The check box "travel option" affects the invoicing of the travel costs. A trip typically consists of various positions (short distance travel, travel and accommodation expenses, taxi, ...). The decision is made here, if the trip will become one position in the invoice or if each individual travel position should be included in the invoice.

The check box "track work time in time tracker" affects the time recording a the type of time evaluation in the system. If working time recording is not desired, this check box must be unchecked. The working time recording in TimeTracker (see TimeTracker) is then faded out and when generating the time confirmation, the chart is adapted appropriately.

Using the selection "duration option", time-related charts can be affected. It can be chosen, if only hours, only person days or both should be listed as the time unit.

In this field a tolerance limit regarding the degree of completion of a project can be selected (see also degree of completion). This percentage displays the maximum difference between the quantitative degree of completion (quotient of actual time and target time) and the degree of completion regarding the contents of the project.

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