

[previous](#) [Home](#) [next](#)

5.03 General Usage

Create Documents

Creating a new document in the work area is described using the document type receipt. After selecting the document type ...

The screenshot shows the Projectile software interface. At the top, there is a navigation bar with the Projectile logo and a menu bar containing 'Tracking and Recording', 'Offers', 'Projects', 'Invoices', and 'Collaboration'. A dropdown menu is open under 'Offers', showing options: 'Occupation', 'Offer' (selected), and 'OrderHeader'. Below this, a window titled 'Offer' is displayed. The window has a menu bar with 'Document', 'Edit', 'View', and 'Actions'. The main area is divided into two tabs: 'Master data' and 'Misc'. The 'Master data' tab is active, showing a form with the following fields:

Offernumber	3	Offer status	No Offer
Project			
Amount	EUR		
Value added tax	MwSt-D-Voll 19		
Offer total	EUR		
OfferCreator	Conner Jane		
Offer date	15.10.2009	Valid until date	29.10.2009
Offer lines			

... an empty document form from the selected document type is displayed. In the example, a new document with the type offer is displayed. The form contains initially only the default values (here the offer number, the employee who created the receipt, the current date, value-added tax, the validity and the status).

Note: In the standard version all required fields in the form are marked red.

In the next step all information fields of the document are filled (Description and Project) and the document is then saved.

History

Each modification (here offer date and validity) are logged when history is activated.

Using this function, modifications in the form (with the appropriate access permissions) are displayed.

In the example two modifications are logged: Creating the document and two modifications ...

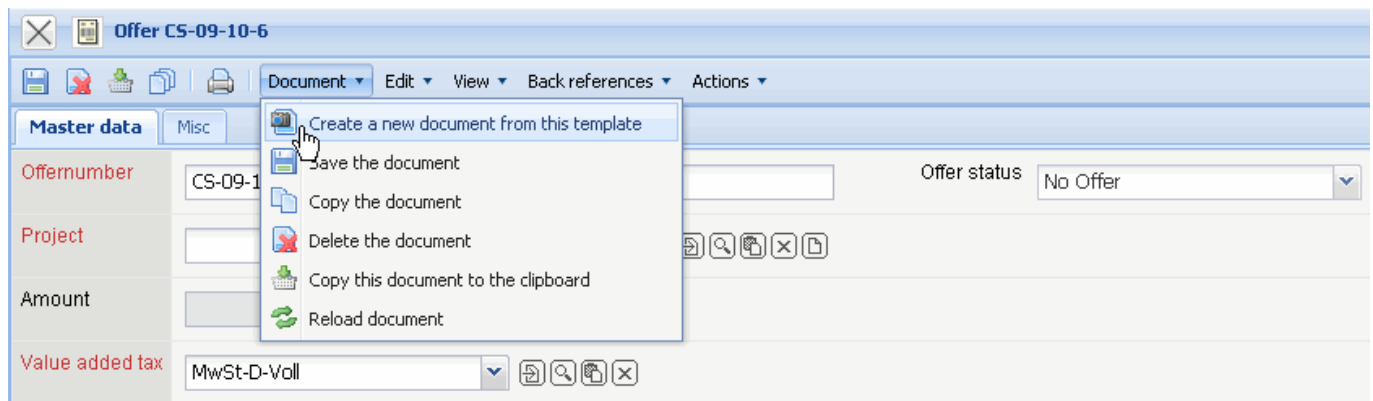
History Project 1 Introduction Projectile 2.5					
Age	Timestamp	History event	User	Details	Historic document
1 d 19:52 h	13.10.2009 16:02:48	Changed (1)	Conner Jane		
33 d 19:34 h	11.09.2009 16:20:07	Changed (1)	Hahn Katrina		
36 d 21:39 h	08.09.2009 14:15:28	Changed (2)	Hahn Katrina		
36 d 21:53 h	08.09.2009 14:01:15	Changed (14)	Hahn Katrina		
36 d 21:53 h	08.09.2009 14:01:15	Created	Hahn Katrina		

... in the fields offer date and validity.

History Project 1 Introduction Projectile 2.5					
Age	Timestamp	History event	User	Details	Historic document
1 d 20:04 h	13.10.2009 16:02:48	Changed (1)	Conner Jane	...	
33 d 19:47 h	11.09.2009 16:20:07	Changed (1)	Hahn Katrina	...	
36 d 21:51 h	08.09.2009 14:15:28	Changed (2)	Hahn Katrina	...	
Field		OldValue		NewValue	
1. Status		Passive		BeingPlanned	
2. Last change of status		08.09.2009	13:59:12	08.09.2009	14:15:28
36 d 22:05 h	08.09.2009 14:01:15	Changed (14)	Hahn Katrina	...	
36 d 22:05 h	08.09.2009 14:01:15	Created	Hahn Katrina		

History can be closed with  as with every form.

To copy a document, the functionality “Create new document from template” is used.



The screenshot shows a web application window titled "Offer CS-09-10-6". The interface includes a menu bar with "Document", "Edit", "View", "Back references", and "Actions". Below the menu bar, there are tabs for "Master data" and "Misc". The "Master data" tab is active, showing fields for "Offernumber" (CS-09-1), "Project", "Amount", and "Value added tax" (MwSt-D-voll). A dropdown menu is open under the "Document" menu, listing several options: "Create a new document from this template", "Save the document", "Copy the document", "Delete the document", "Copy this document to the clipboard", and "Reload document". The "Offer status" field is set to "No Offer".

This functionality copies the existing document and pre-sets the default values. Here, offer 3 becomes offer 4.

Angebot CS-09-06-3

Dokument Bearbeiten Ansicht Aktionen

Stammblatt Sonstiges

Angebot 4

Bezeichnung CS-09-06-3

Projekt 1.1 Konzeption

Status Kein Angebot

Netto 0,00 EUR

Umsatzsteuer MwSt-D-Voll

Brutto 0,00 EUR

Mitarbeiter Test

Angebotsdatum 29.06.2009

Gültig bis 13.07.2009

Original-Angebot

Angebotspositionen

Finally various values are modified and the document is then saved.

Delete Document

If a document is not needed, clicking on ...



... deletes the document.

Dokumente löschen

Dokumente löschen
Archiv Standard

Wollen Sie wirklich löschen? ☒

Dokumente

	Typ	Bezeichnung	Status
1	Angebot	Neues Angebot	Kein Angebot

Abhängige Dokumente

Keine Einträge

Verweigte Dokumente

Keine Einträge

BrokenLink-Warnung

Keine Einträge

BrokenLink-Fehler

Keine Einträge

Wollen Sie wirklich löschen? ☒

Before the document is deleted, a dialogue asking if the document should be deleted is displayed.

This dialog is a precautionary measure, as only selected users can reactivate this deletion process (see also trash/archive). If data with references are deleted (as in the project example), all data is displayed in the delete dialog, which will also be deleted.

Dokumente löschen

Dokumente löschen
Archiv Standard

Wollen Sie wirklich löschen? ☒

Dokumente

	Typ	Bezeichnung	Status
1	Projekt	1 Entwicklung	passiv

Abhängige Dokumente

	Typ	Bezeichnung	Status
1	Projekt	1.1 Konzeption	passiv
2	Meilenstein	1.1-A Konzeptphase 10.08.2009	
3	Vertrag	vav	
4	Zahlungsplan	1-1 cv<ysc	
5	Angebot	CS-09-06-3	Kein Angebot
6	Angebot	Neues Angebot	Kein Angebot
7	Projekt	1.2 Entwicklung	passiv

From:
<https://infodesire.net/dokuwiki/> - **Projectile-Online-Handbuch**

Permanent link:
https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_4:4.03_allgemeine_bedienung&rev=1255602571

Last update: **2019/10/25 14:09**

