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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 displays 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' (highlighted with a mouse cursor), and 'OrderHeader'. Below the navigation bar, the 'Offer' document form is visible. It has a title bar 'Offer' and a menu bar 'Document', 'Edit', 'View', 'Actions'. The form is divided into two tabs: 'Master data' and 'Misc'. The 'Master data' tab is active, showing the following fields:

Offernumber	3	Offer status	No Offer
Project	[Empty field with search and selection icons]		
Amount	[Empty field] EUR		
Value added tax	MwSt-D-Voll 19	[Empty field with search and selection icons]	
Offer total	[Empty field] EUR		
OfferCreator	Conner Jane		
Offer date	15.10.2009	Valid until date	29.10.2009
Offer lines	[Empty table area]		

At the bottom of the form, there are icons for 'Close', 'Save', 'Print', and 'New'.

Offer CS-09-10-5

Document Edit View Back references Actions

Master data Misc

Offernumber CS-09-10-5 Offer status No Offer

Project 2.1 Planning

Amount 0,00 EUR

Value added tax MwSt-D-Voll

Offer total 0,00 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.

Offer CS-09-10-5

Document Edit View Back references Actions

Master data Misc

Offernumber CS-09-10-5 Offer status No Offer

Project 2.1 Planning

Amount 0,00 EUR

Value added tax MwSt-D-Voll

Offer total 0,00 EUR

OfferCreator Conner Jane

Offer date 15.10.2009 Valid until date 29.10.2009

Offer lines

History

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

Offer date

15.10.2009

Valid until date

29.10.2009

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

Offer CS-09-10-5

Document Edit View Back references Actions

Master data Misc

Offerstatus No Offer

Offernumber CS-09-10-5

Project 2.1 Planning

Amount 0,00 EUR

Show this document in the navigator

Additional information

Document history

Show external url

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

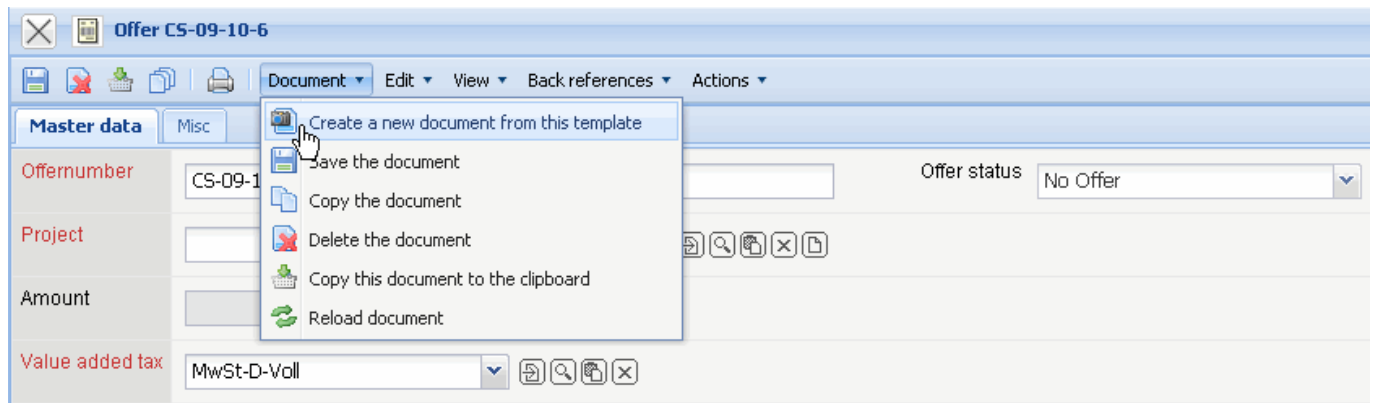
History Project 1 Introduction Projectile 2.5						
History Project 1 Introduction Projectile 2.5						
Age	Timestamp		History event	User	Details	Historic document
1 d 19:52 h	13.10.2009 16:02:48		Changed (1)	Conner Jane		
33 d 19:34 h	11.09.2009 16:20:07		Changed (1)	Hahn Katrina		
36 d 21:39 h	08.09.2009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

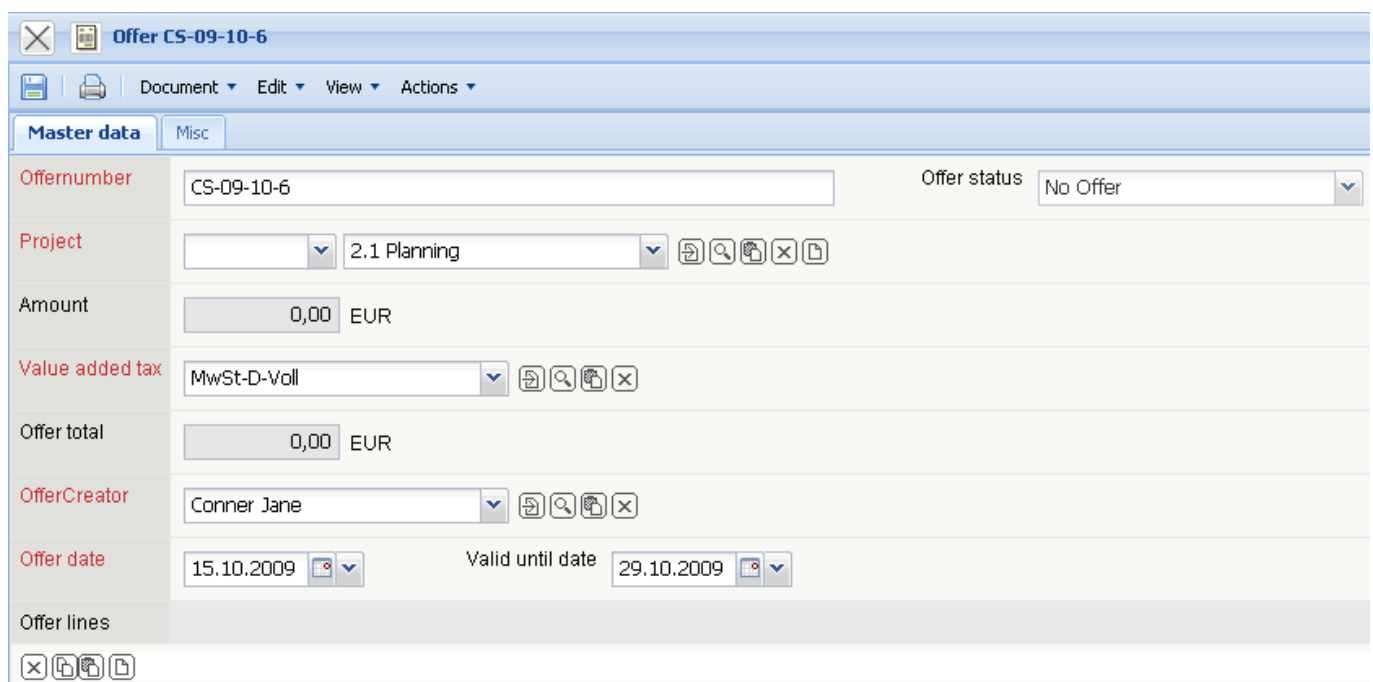
History Project 1 Introduction Projectile 2.5						
History Project 1 Introduction Projectile 2.5						
Age	Timestamp		History event	User	Details	Historic document
1 d 20:04 h	13.10.2009 16:02:48		Changed (1)	Conner Jane		
33 d 19:47 h	11.09.2009 16:20:07		Changed (1)	Hahn Katrina		
36 d 21:51 h	08.09.2009 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.



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



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

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