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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 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 'Logout'. A dropdown menu is open under 'Offers', showing options: 'Occupation', 'Offer' (selected), and 'OrderHeader'. Below this, a window titled 'Offer CS-09-10-5' is displayed. The window has a menu bar with 'Document', 'Edit', 'View', 'Back references', and 'Actions'. The main area is divided into 'Master data' and 'Misc' tabs. The 'Master data' tab is active, showing the following fields:

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

At the bottom of the window, there is a section for 'Offer lines' with a plus icon and a minus icon.

... 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 ...

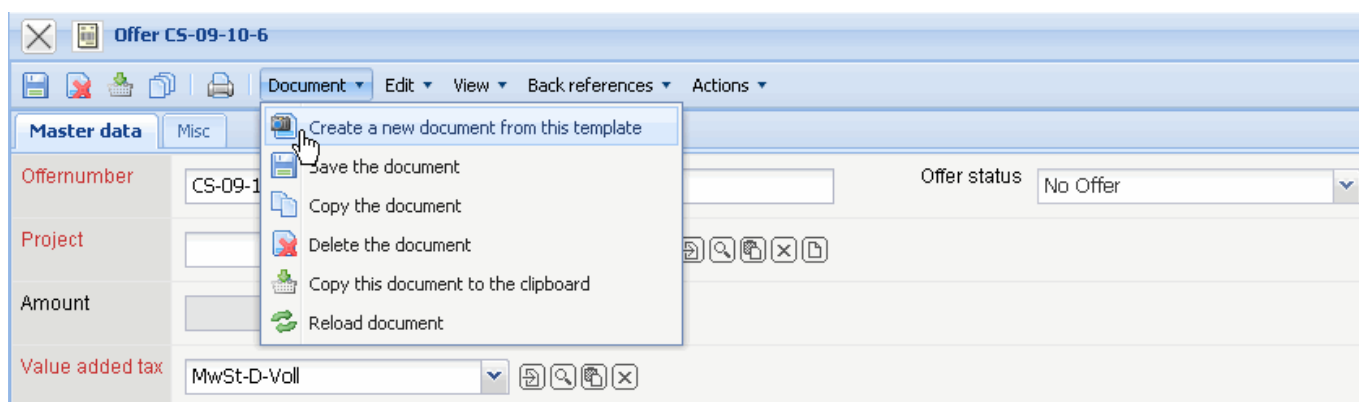
History Project 1 Introduction Projectile 2.5					
Age	Timestamp	History event	User	Details	Historic document
1 d 19:52 h	13.10.2009 16:02:48	Changed (1)	Conner Jane		
33 d 19:34 h	11.09.2009 16:20:07	Changed (1)	Hahn Katrina		
36 d 21:39 h	08.09.2009 14:15:28	Changed (2)	Hahn Katrina		
36 d 21:53 h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

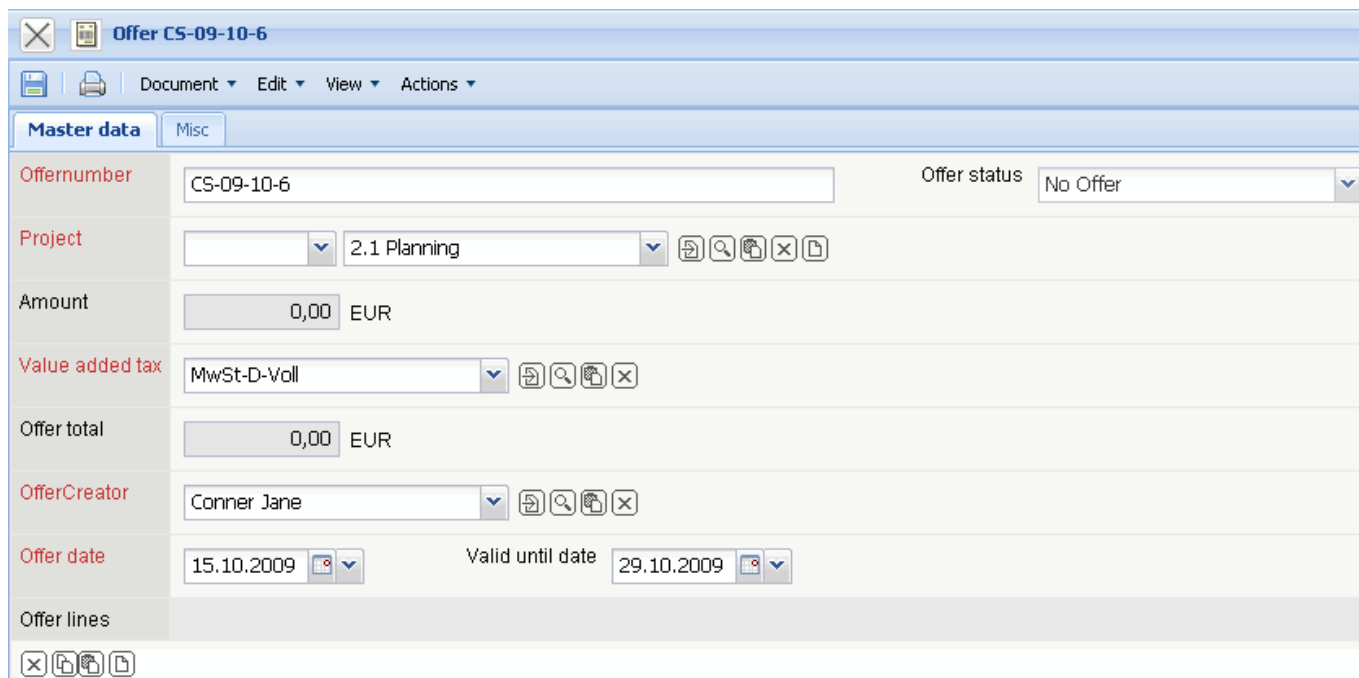
History Project 1 Introduction Projectile 2.5					
Age	Timestamp	History event	User	Details	Historic document
1 d 20:04 h	13.10.2009 16:02:48	Changed (1)	Conner Jane	...	
33 d 19:47 h	11.09.2009 16:20:07	Changed (1)	Hahn Katrina	...	
36 d 21:51 h	08.09.2009 14:15:28	Changed (2)	Hahn Katrina	...	
Field		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.



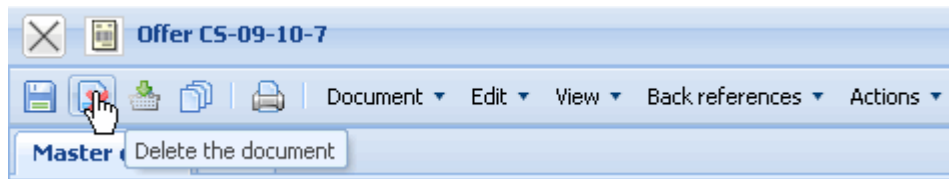
This functionality copies the existing document and pre-sets the default values. Here, offer 5 becomes offer 6.



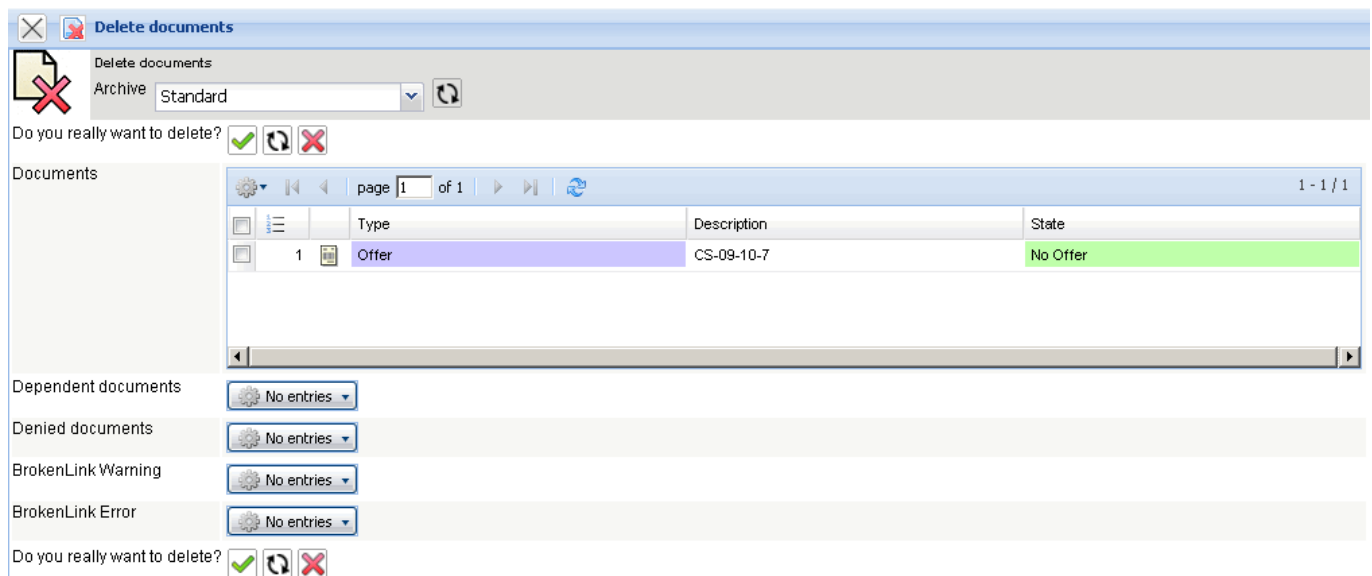
Finally various values are modified and the document is then saved.

Delete Document

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



... deletes the document.



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.

Delete documents

Delete documents
Archive Standard

Do you really want to delete?

Documents

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	Type	Description	State
1	Project	3 Introduction Projectile	Active

Dependent documents

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	Type	Description	State
1	Project	3.1 Introduction Accounting	Active
2	Project	3.1.1 Introduction Accounting	Active
3	Job	3.1-1 Introduction Projectile	
4	TimeTracking	21.09.2009 3-4	
5	Budget	3.1-1 Travel costs	
6	Payment	TLC-09-10-6 23.10.2009	
7	Receipt	3 Taxi 12 Timothy Jones Workshop	

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