



Projectile

Version 6

The integrated total solution for service providers: projects, processes, knowledge.

Help, Part 1: User Interface

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1.1 Log In, Change Password, Log Out

In order for a user to log on to the system, it is necessary to define this user as an employee. After starting the application (bookmark in the browser or entering the URL), the login screen appears first. The start address usually has the following structure: `http://projectile-server/projectile/start`. In the login screen, the user must log in:

Anmelden

Bitte melden Sie sich an
Please log in



Login

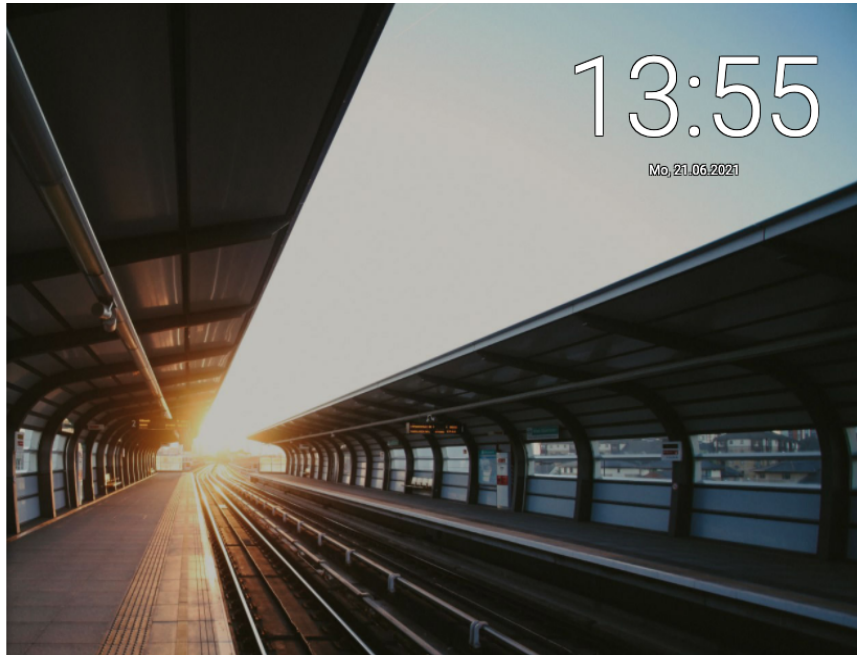
Passwort

Anmelden

- Support
- Intranet

Cockpit

Projectile 5.9.46 peter
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By entering the login and password, the user enters the system with the "Login" button:

Anmelden

Bitte melden Sie sich an
Please log in



Login

peter

Passwort

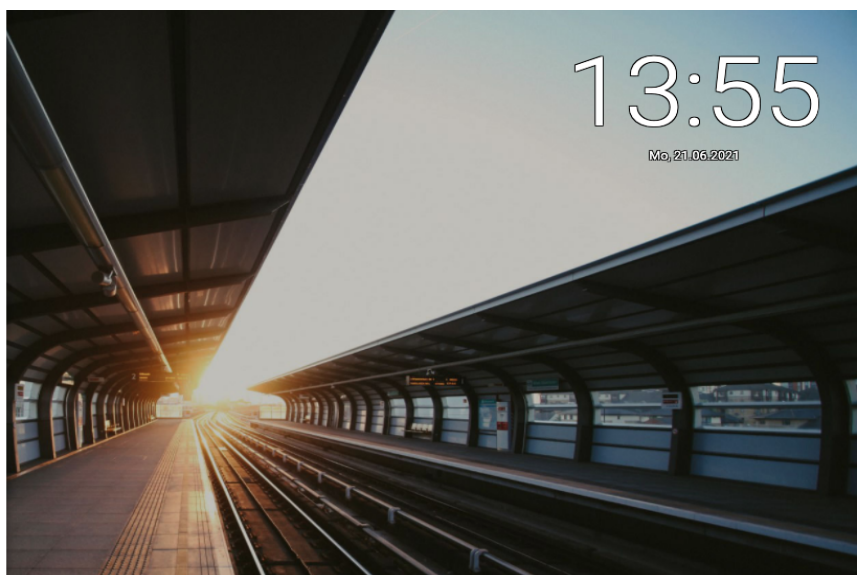
.....

Anmelden

- Support
- Intranet

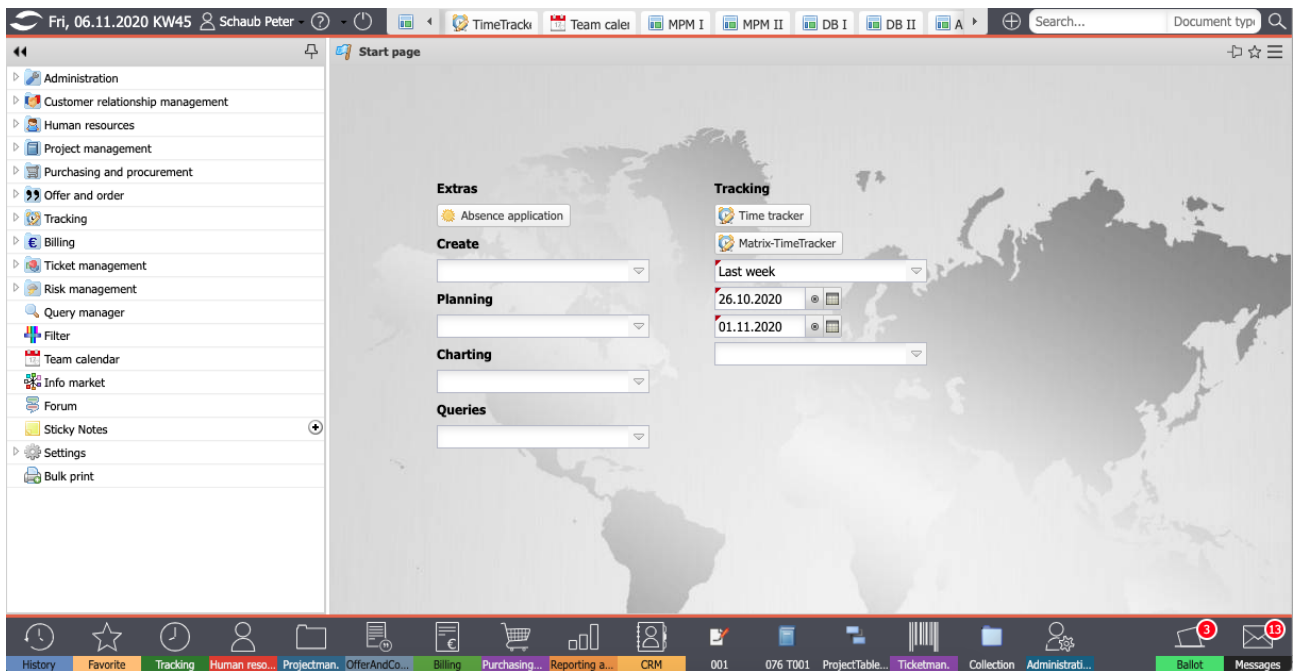
Cockpit

Projectile 5.9.46 peter
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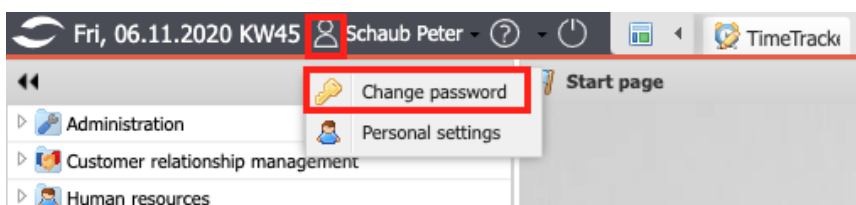
Then the Projectile splash screen appears.

The login (and possibly the password) is usually assigned by the administrator. If the administrator has not assigned a password, it should be changed by the user immediately after the first login.



Note: The passwords are stored encrypted in the database. If the password is forgotten, the administrator must reset the password in the employee administration!

The function "Change Password" is located in the upper menu:



Here the user can assign or change his own password. A dialog box appears in which the old password is requested and then a new password can be entered and confirmed.

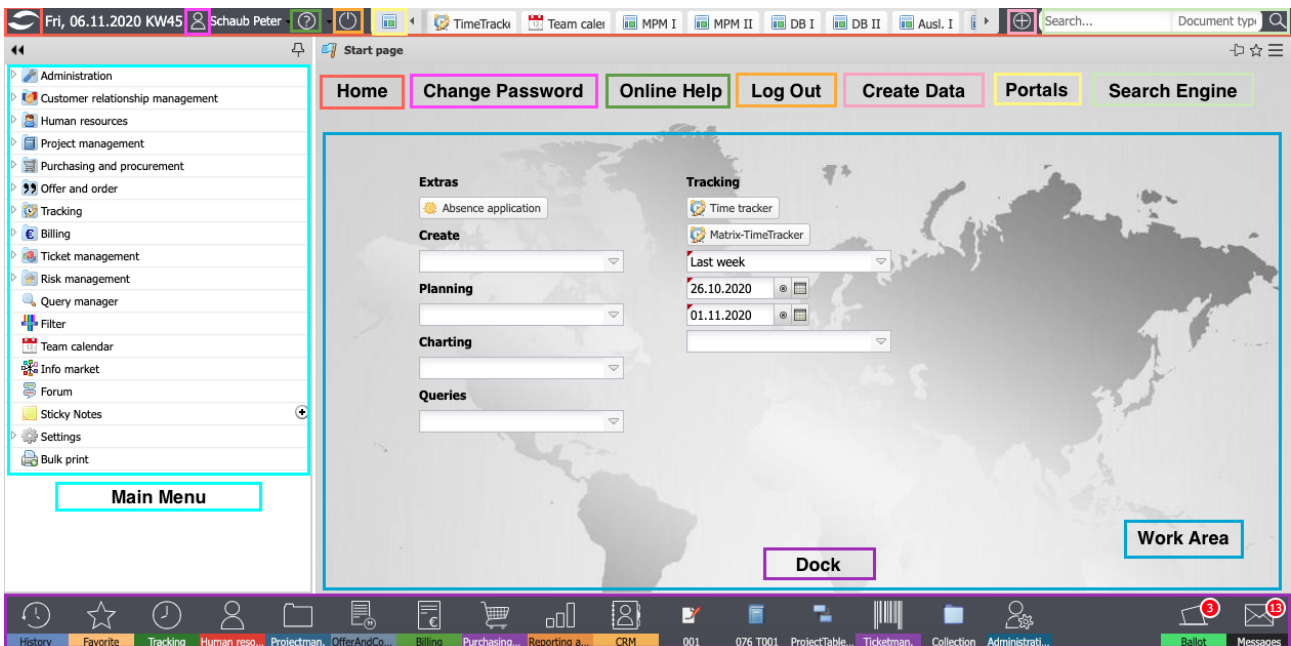
To log off from the system, activate this button:



In the browser, it is then possible to log on again (possibly as another user for administration) or to close the window permanently.

1.2 User Interface

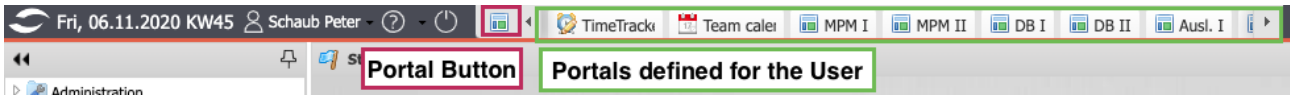
After logging on to the system, the following elements usually appear (depending on the scope and authorization):



When clicking the "Home" button, the application switches directly to the workspace, regardless of which mask or dialog is open. Clicking on the "Employee button" opens the "Change password" dialog, among other things.

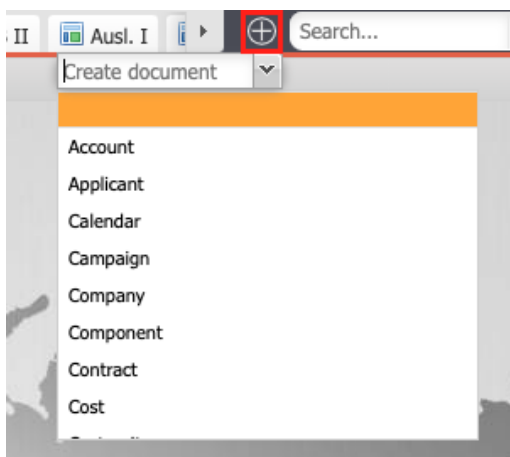
Clicking on the "Online Help" opens the Projectile online help and by clicking on the "Logout Button" the user is logged out of the system.

Clicking on the "Portal Button" will open or close the portals (if any are defined):



1.3 Creating and Editing Data

With the help of the "+-Button" data can be created in Projectile. The authorization system determines which data a user may create. In the following example, data of the type "document" is entered without going into the technical aspects of cost entry:



Then a mask opens (here of the type "receipt"):

Basic information			
Description			
Type of cost			
Employee	Schaub Peter		
Project			
Date	06.11.2020		
Note			

Costs			
Net amount	0,00 EUR	VAT	MwSt-D-19%
Amount in foreign currency		Gross amount	0,00 EUR
Budget		Currency	EURO

The fields with a red label are mandatory fields (which must be filled in by the user) and the fields with a black label are optional fields. Often the input masks also have tabs (as in this example). The tabs provide a better structuring of the masks and - especially with many elements - more clarity. To switch to a tab, click on the name of the tab.

After entering the necessary information, the record can be saved. In the window bar, unsaved changes are displayed if necessary:

The screenshot shows a software window titled "Receipt of costs 27". The window has a menu bar with "Document" and "View". Below the menu bar, there are two tabs: "General data" and "Misc". The "General data" tab is active. The form is divided into two sections: "Basic information" and "Costs".

Basic information:

- Description: Taxi
- Type of cost: Fahrtkosten
- Employee: Schaub Peter
- Project: 025.2 Customizing
- Date: 11.12.2020
- Note: (empty text field)

Costs:

- Net amount: 25,00 EUR
- VAT: MwSt-D-19%
- Gross amount: 25,00 EUR
- Amount in foreign currency: (empty text field)
- Currency: EURO
- Budget: (empty dropdown menu)

There is a red label "unsaved Changes" in the top right corner of the window and a blue "Save" button in the center of the form.

After saving, the data is stored in the SQL database and is available system-wide:

The screenshot shows the same software window, but now titled "Receipt of costs 27 Taxi". The menu bar now includes "Document", "Edit", "View", and "Actions". The "General data" and "Misc" tabs are still present. The form data is the same as in the previous screenshot, but the "Gross amount" field now shows "29,75 EUR" instead of "25,00 EUR".

Basic information:

- Description: Taxi
- Type of cost: Fahrtkosten
- Employee: Schaub Peter
- Project: 025.2 Customizing
- Date: 11.12.2020
- Note: (empty text field)

Costs:

- Net amount: 25,00 EUR
- VAT: MwSt-D-19%
- Gross amount: 29,75 EUR
- Amount in foreign currency: 25,00
- Currency: EURO
- Budget: (empty dropdown menu)

1.4 Transferring a Data Record to the Dockbar

After saving (or after opening saved data) the record can be transferred to the dockbar:

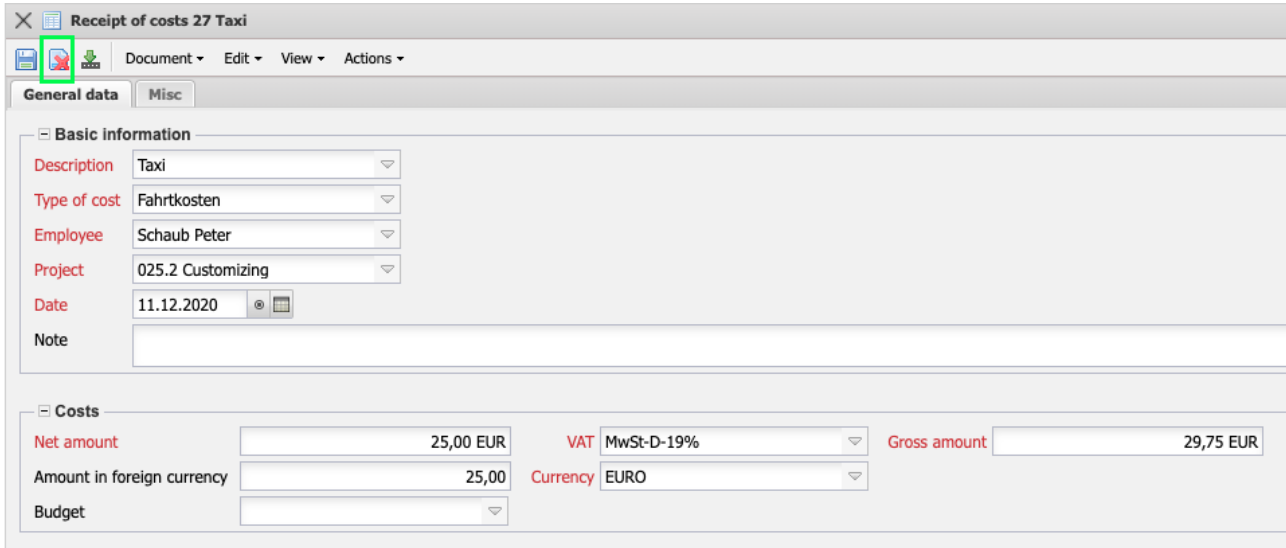
The screenshot displays a software window titled "Receipt of costs 27 Taxi". The window has a menu bar with "Document", "Edit", "View", and "Actions". A red box highlights the "Transfer to Dockbar" button in the "Actions" menu. Below the menu bar, there are two tabs: "General data" and "Misc". The "General data" tab is active, showing a form with the following fields:

- Basic Information**
 - Description: Taxi
 - Type of cost: Fahrtkosten
 - Employee: Schaub Peter
 - Project: 025.2 Customizing
 - Date: 11.12.2020
 - Note: (empty)
- Costs**
 - Net amount: 25,00 EUR
 - VAT: MwSt-D-19%
 - Gross amount: 29,75 EUR
 - Amount in foreign currency: 25,00
 - Currency: EURO
 - Budget: (empty)

At the bottom of the window is a dockbar with various icons. A red box highlights a notification in the dockbar that says "Entry transferred to Dockbar". To the right of the notification is a button labeled "27 Taxi".

1.5 Deleting Data

With the help of the "delete button" data in Projectile can be deleted from the database:



Receipt of costs 27 Taxi

Document Edit View Actions

General data Misc

Basic information

Description Taxi

Type of cost Fahrtkosten

Employee Schaub Peter

Project 025.2 Customizing

Date 11.12.2020

Note

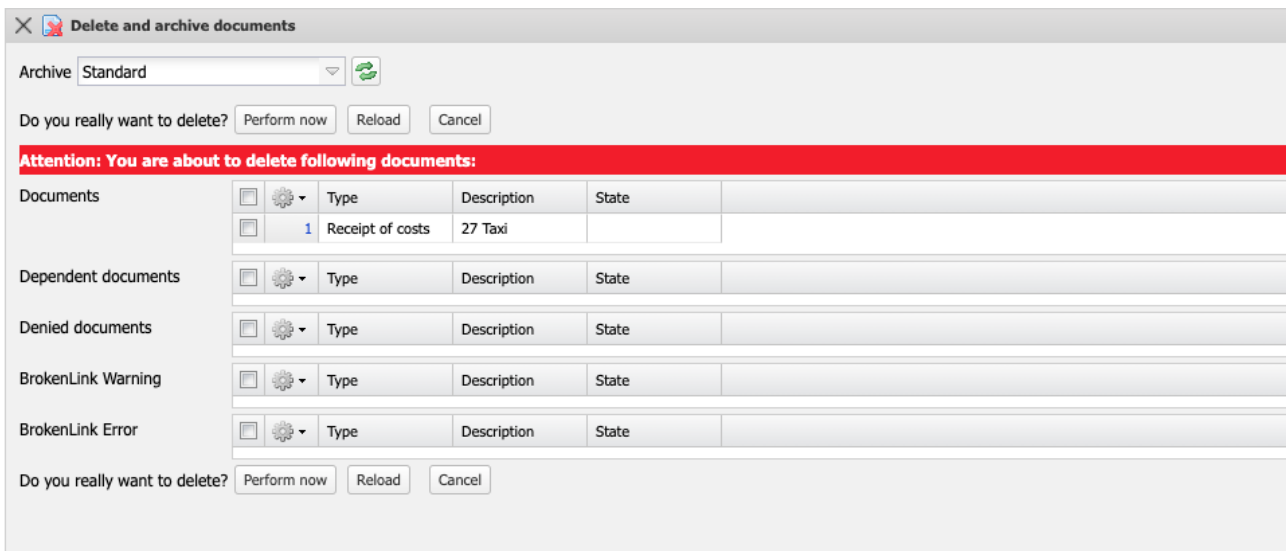
Costs

Net amount 25,00 EUR VAT MwSt-D-19% Gross amount 29,75 EUR

Amount in foreign currency 25,00 Currency EURO

Budget

Before the final deletion a safety query appears:



Delete and archive documents

Archive Standard

Do you really want to delete? Perform now Reload Cancel

Attention: You are about to delete following documents:

Documents	Type	Description	State
1	Receipt of costs	27 Taxi	

Dependent documents

Type	Description	State
------	-------------	-------

Denied documents

Type	Description	State
------	-------------	-------

BrokenLink Warning

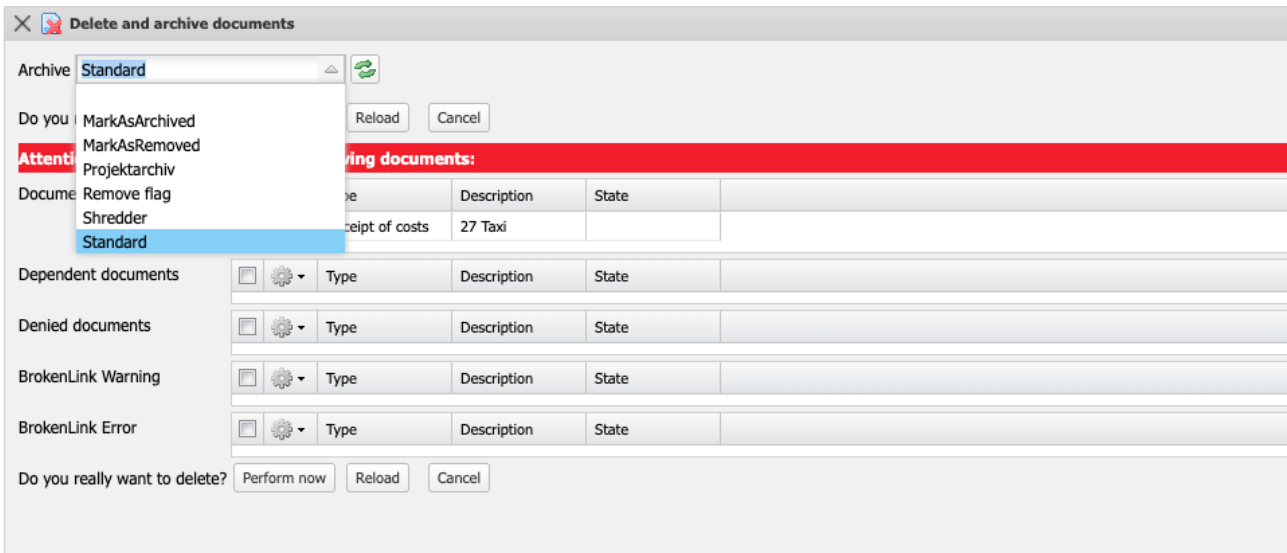
Type	Description	State
------	-------------	-------

BrokenLink Error

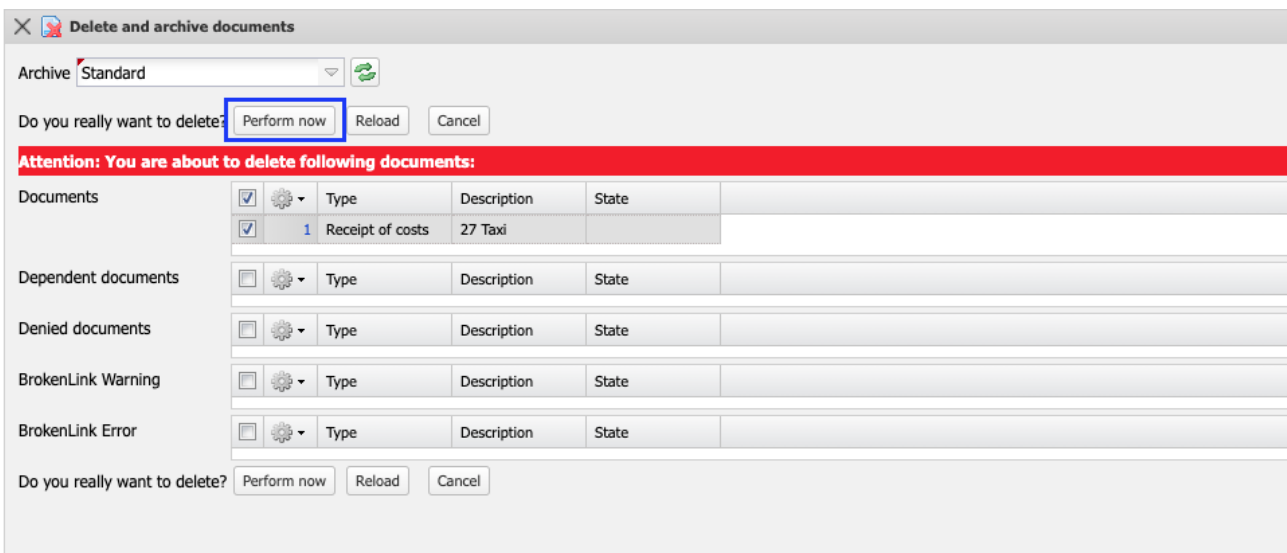
Type	Description	State
------	-------------	-------

Do you really want to delete? Perform now Reload Cancel

Among other things, dependent data and some deletion options are displayed here. Data can be irretrievably deleted ("shredder"), moved to an archive, moved to the standard archive (equivalent to a recycle bin) or marked as archived or deleted.



Usually only administrators have access to deleted documents in the standard archive. With the help of the action "Execute Now" the deletion process is executed:

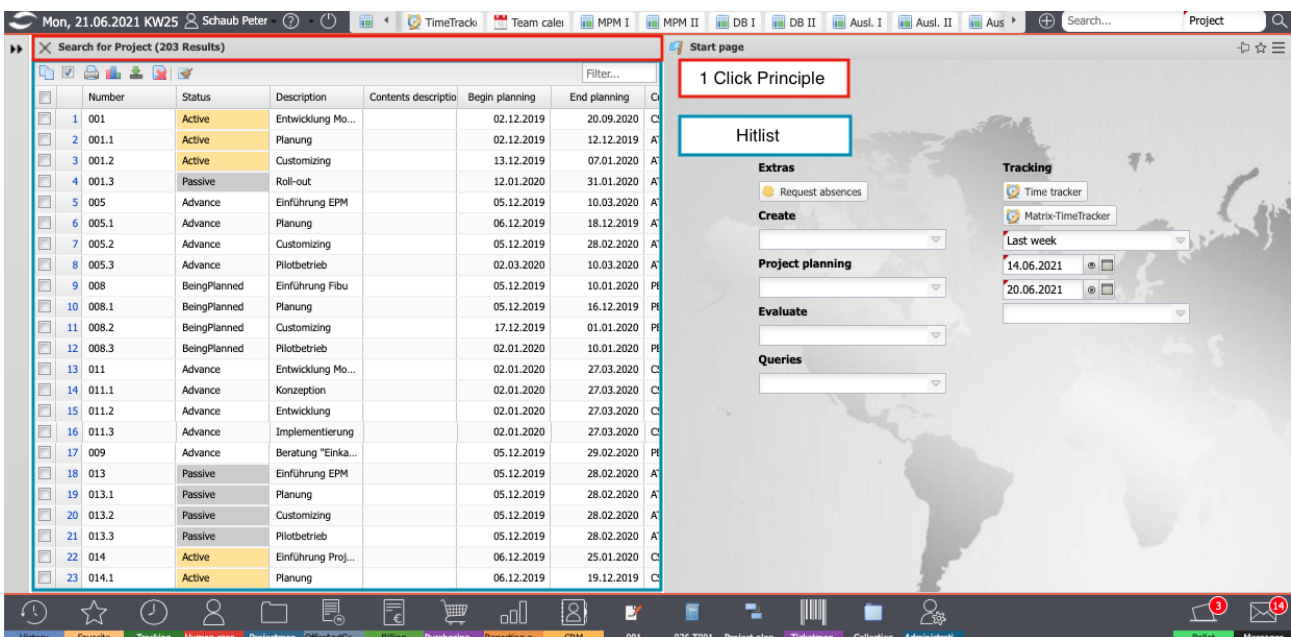


1.6 Searching and Finding Data

The search engine is used to find data. By entering a search string in the search field and selecting a category, all documents in the category are searched for the string, based on a full text search. Tapping in the category field restricts the selectable document types. In the example, the string "Entwi" is searched for in the main projects:



It is also possible to search the entire database without selecting a category. However, since such searches can take longer, a warning message appears if no selection is made. The following figure shows the result list of the search query:



The hit list lists all data in which the defined search string "Entwi" occurs. The hit list can be enlarged by clicking on the window bar and further filtering within the hit list is possible:

Mon, 21.06.2021 KW25 Schaub Peter

Search for Project (203 Results)

Number	Status	Description	Contents descriptio	Begin planning	End planning	Customer	Exter Unit
1	001	Active	Entwicklung Mo...	02.12.2019	20.09.2020	CSH Consult AG	Entwicklung
2	001.1	Active	Planung	02.12.2019	12.12.2019	ATB Autobau AG	
3	001.2	Active	Customizing	13.12.2019	07.01.2020	ATB Autobau AG	Beratung
4	001.3	Passive	Roll-out	12.01.2020	31.01.2020	ATB Autobau AG	Beratung
5	005	Advance	Einführung EPM	05.12.2019	10.03.2020	ATB Autobau AG	Beratung
6	005.1	Advance	Planung	06.12.2019	18.12.2019	ATB Autobau AG	
7	005.2	Advance	Customizing	05.12.2019	28.02.2020	ATB Autobau AG	
8	005.3	Advance	Pilotbetrieb	02.03.2020	10.03.2020	ATB Autobau AG	
9	008	BeingPlanned	Einführung Fibu	05.12.2019	10.01.2020	PBA Privatbank ...	Beratung
10	008.1	BeingPlanned	Planung	05.12.2019	16.12.2019	PBA Privatbank ...	
11	008.2	BeingPlanned	Customizing	17.12.2019	01.01.2020	PBA Privatbank ...	Beratung
12	008.3	BeingPlanned	Pilotbetrieb	02.01.2020	10.01.2020	PBA Privatbank ...	
13	011	Advance	Entwicklung Mo...	02.01.2020	27.03.2020	CSH Consult AG	Entwicklung
14	011.1	Advance	Konzeption	02.01.2020	27.03.2020	CSH Consult AG	
15	011.2	Advance	Entwicklung	02.01.2020	27.03.2020	CSH Consult AG	
16	011.3						
17	009						Beratung
18	013	Passive	Einführung EPM	05.12.2019	28.02.2020	ATB Autobau AG	
19	013.1	Passive	Planung	05.12.2019	28.02.2020	ATB Autobau AG	
20	013.2	Passive	Customizing	05.12.2019	28.02.2020	ATB Autobau AG	
21	013.3	Passive	Pilotbetrieb	05.12.2019	28.02.2020	ATB Autobau AG	
22	014	Active	Einführung Proj...	06.12.2019	25.01.2020	CSH Consult AG	Beratung
23	014.1	Active	Planung	06.12.2019	19.12.2019	CSH Consult AG	Beratung

1 Click to enlarge the selected area

filter within the hitlist

Extras: Request absences

Tracking: Time tracker, Matrix-TimeTracker

Create: Last week

Project planning: 14.06.2021, 20.06.2021

Evaluate: [Dropdown]

Queries: [Dropdown]

The hit list can be sorted and columns can be ...

Search for Project (203 Results)

Number	Status	Description	Contents descriptio	Begin planning	End planning	Customer	Exter Unit	Project managers	Planning time	Actual time
1	001	Active	Entwicklung Mo...	Sort Ascending	02.12.2019	20.09.2020	CSH Consult AG	Schaub Peter, M...	240:00	70:45
2	001.1	Active	Planung	Sort Descending	02.12.2019	12.12.2019	ATB Autobau AG	Dohle Hannah	56:00	42:45
3	001.2	Active	Customizing	Columns	13.12.2019	07.01.2020	ATB Autobau AG	Schaub Peter	144:00	04:00
4	001.3	Passive	Roll-out	Group by this field	12.01.2020	31.01.2020	ATB Autobau AG	Schaub Peter	40:00	24:00
5	005	Advance	Einführung EPM	Show in groups	05.12.2019	10.03.2020	ATB Autobau AG	Schmidt Norbert	216:00	26:15
6	005.1	Advance	Planung	Filters	06.12.2019	18.12.2019	ATB Autobau AG	Schmidt Norbert	64:00	07:00
7	005.2	Advance	Customizing		05.12.2019	28.02.2020	ATB Autobau AG	Schmidt Norbert	96:00	19:15
8	005.3	Advance	Pilotbetrieb		02.03.2020	10.03.2020	ATB Autobau AG	Schmidt Norbert	56:00	00:00
9	008	BeingPlanned	Einführung Fibu		05.12.2019	10.01.2020	PBA Privatbank ...	Schaub Peter	232:00	00:00
10	008.1	BeingPlanned	Planung		05.12.2019	16.12.2019	PBA Privatbank ...	Schaub Peter	64:00	00:00
11	008.2	BeingPlanned	Customizing		17.12.2019	01.01.2020	PBA Privatbank ...	Schaub Peter	112:00	00:00
12	008.3	BeingPlanned	Pilotbetrieb		02.01.2020	10.01.2020	PBA Privatbank ...	Schaub Peter	56:00	00:00
13	011	Advance	Entwicklung Mo...		02.01.2020	27.03.2020	CSH Consult AG	Schmidt Norbert	242:00	14:00
14	011.1	Advance	Konzeption		02.01.2020	27.03.2020	CSH Consult AG	Schmidt Norbert	64:00	00:00
15	011.2	Advance	Entwicklung		02.01.2020	27.03.2020	CSH Consult AG	Schmidt Norbert	122:00	14:00
16	011.3	Advance	Implementierung		02.01.2020	27.03.2020	CSH Consult AG	Schmidt Norbert	56:00	00:00
17	009	Advance	Beratung "Einka...		05.12.2019	29.02.2020	PBA Privatbank ...	Schaub Peter, J...	120:00	00:00
18	013	Passive	Einführung EPM		05.12.2019	28.02.2020	ATB Autobau AG	Schaub Peter	232:00	00:00
19	013.1	Passive	Planung		05.12.2019	28.02.2020	ATB Autobau AG	Schaub Peter	64:00	00:00
20	013.2	Passive	Customizing		05.12.2019	28.02.2020	ATB Autobau AG	Schaub Peter	112:00	00:00
21	013.3	Passive	Pilotbetrieb		05.12.2019	28.02.2020	ATB Autobau AG	Schaub Peter	56:00	00:00
22	014	Active	Einführung Proj...		06.12.2019	25.01.2020	CSH Consult AG	Dohle Hannah, ...	224:00	27:00
23	014.1	Active	Planung		06.12.2019	19.12.2019	CSH Consult AG	Dohle Hannah	56:00	19:00

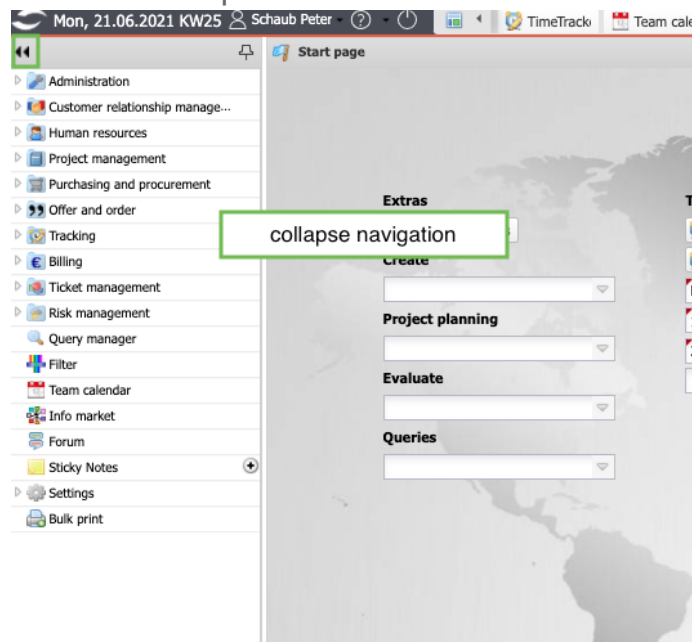
... shown or hidden.

Search for Project (203 Results)

	Number	Status	Description	Contents description	Begin planning	End planning	Customer	Exter	Unit	Project managers	Planning time	Actual time
1	001	Active	Entwicklung Mo...	Sort Ascending	02.12.2019	20.09.2020	CSH Consult AG	<input checked="" type="checkbox"/>	Entwicklung	Schaub Peter, M...	240:00	70:45
2	001.1	Active	Planung	Sort Descending	02.12.2019	12.12.2019	ATB Autobau AG	<input checked="" type="checkbox"/>		Dohle Hannah	56:00	42:45
3	001.2	Active	Customizing	Columns	12.12.2019	07.01.2020	ATB Autobau AG	<input checked="" type="checkbox"/>	Beratung	Schaub Peter	144:00	04:00
4	001.3	Passive	Roll-out	Group by this field			ATB Autobau AG	<input checked="" type="checkbox"/>	Beratung	Schaub Peter	40:00	24:00
5	005	Advance	Einführung EPM	Show in groups			ATB Autobau AG	<input checked="" type="checkbox"/>	Beratung	Schmidt Norbert	216:00	26:15
6	005.1	Advance	Planung	Filters			ATB Autobau AG	<input checked="" type="checkbox"/>		Schmidt Norbert	64:00	07:00
7	005.2	Advance	Customizing				ATB Autobau AG	<input checked="" type="checkbox"/>		Schmidt Norbert	96:00	19:15
8	005.3	Advance	Pilotbetrieb				ATB Autobau AG	<input checked="" type="checkbox"/>		Schmidt Norbert	56:00	00:00
9	008	BeingPlanned	Einführung Fibu				PBA Privatbank ...	<input checked="" type="checkbox"/>	Beratung	Schaub Peter	232:00	00:00
10	008.1	BeingPlanned	Planung				PBA Privatbank ...	<input checked="" type="checkbox"/>		Schaub Peter	64:00	00:00
11	008.2	BeingPlanned	Customizing				PBA Privatbank ...	<input checked="" type="checkbox"/>	Beratung	Schaub Peter	112:00	00:00
12	008.3	BeingPlanned	Pilotbetrieb				PBA Privatbank ...	<input checked="" type="checkbox"/>		Schaub Peter	56:00	00:00
13	011	Advance	Entwicklung Mo...				CSH Consult AG	<input checked="" type="checkbox"/>	Entwicklung	Schmidt Norbert	242:00	14:00
14	011.1	Advance	Konzeption				CSH Consult AG	<input checked="" type="checkbox"/>		Schmidt Norbert	64:00	00:00
15	011.2	Advance	Entwicklung				CSH Consult AG	<input checked="" type="checkbox"/>		Schmidt Norbert	122:00	14:00
16	011.3	Advance	Implementierung		02.01.2020	27.03.2020	CSH Consult AG	<input checked="" type="checkbox"/>		Schmidt Norbert	56:00	00:00
17	009	Advance	Beratung "Einka...		05.12.2019	29.02.2020	PBA Privatbank ...	<input checked="" type="checkbox"/>	Beratung	Schaub Peter, J...	120:00	00:00
18	013	Passive	Einführung EPM		05.12.2019	28.02.2020	ATB Autobau AG	<input checked="" type="checkbox"/>		Schaub Peter	232:00	00:00
19	013.1	Passive	Planung		05.12.2019	28.02.2020	ATB Autobau AG	<input checked="" type="checkbox"/>		Schaub Peter	64:00	00:00
20	013.2	Passive	Customizing		05.12.2019	28.02.2020	ATB Autobau AG	<input checked="" type="checkbox"/>		Schaub Peter	112:00	00:00
21	013.3	Passive	Pilotbetrieb		05.12.2019	28.02.2020	ATB Autobau AG	<input checked="" type="checkbox"/>		Schaub Peter	56:00	00:00
22	014	Active	Einführung Proj...		06.12.2019	25.01.2020	CSH Consult AG	<input checked="" type="checkbox"/>	Beratung	Dohle Hannah, ...	224:00	27:00
23	014.1	Active	Planung		06.12.2019	19.12.2019	CSH Consult AG	<input checked="" type="checkbox"/>	Beratung	Dohle Hannah	56:00	19:00

1.7 Main Menu, Hit List and Work Area

The main menu can be folded up...

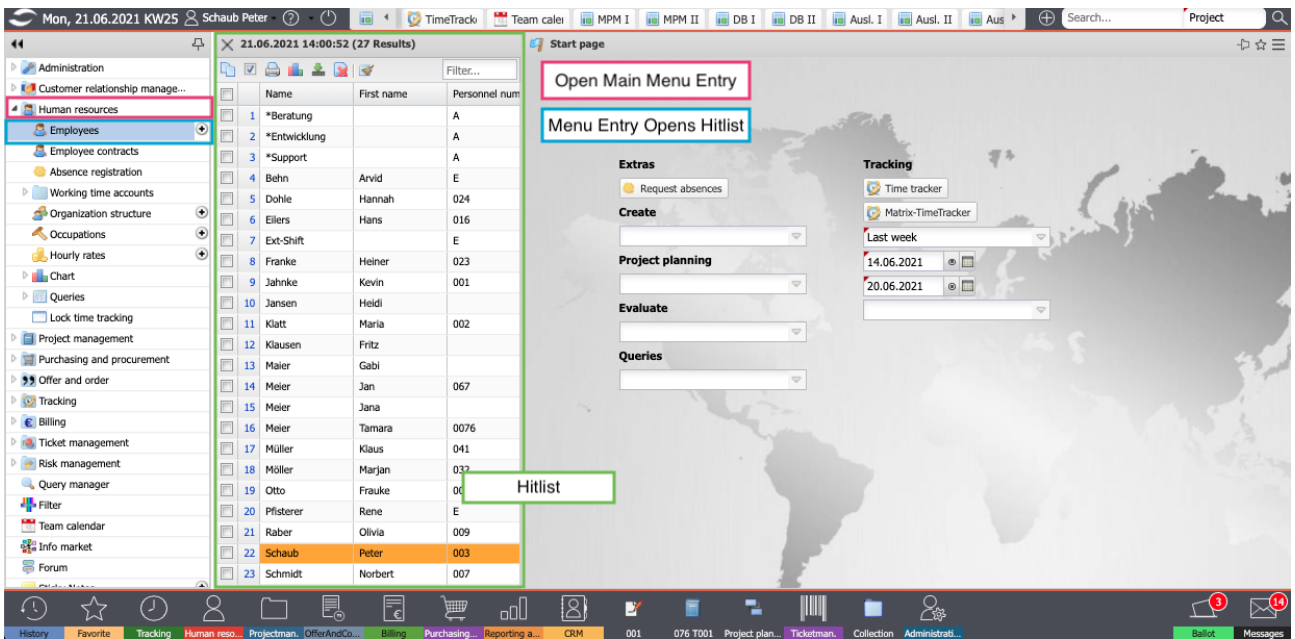


... and unfolded.

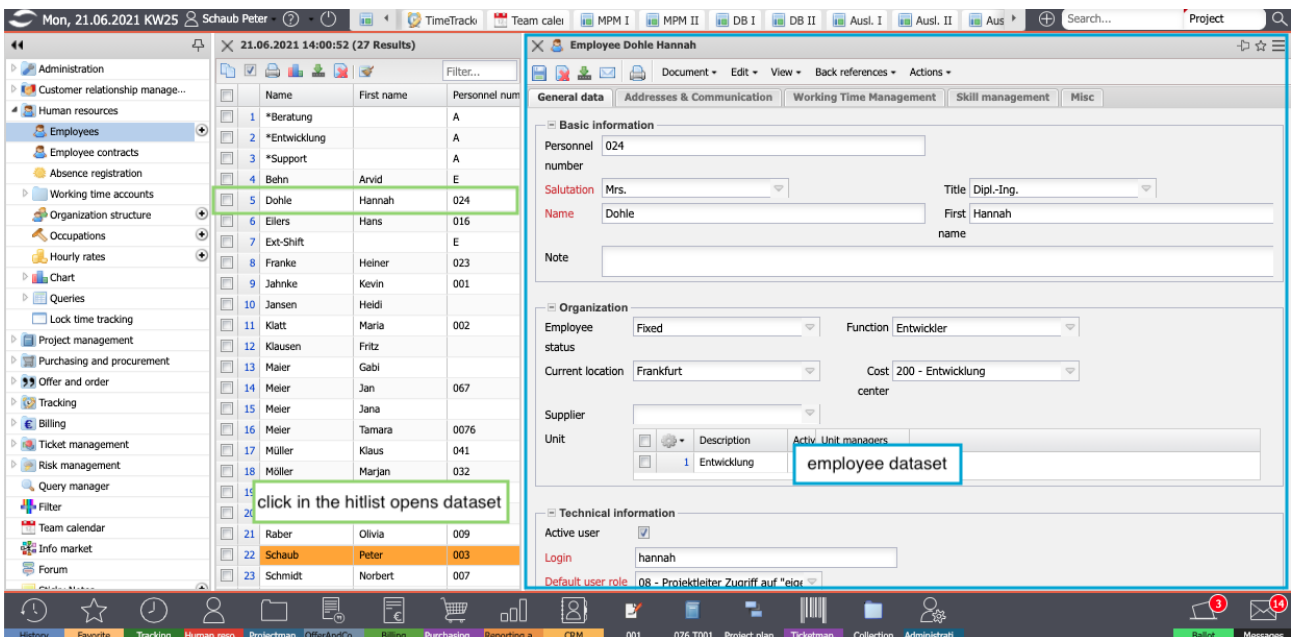


The main menu contains the different areas, such as "Administration" (see Administration Guide), "CRM" (part 2 of the help), "Personnel" (part 3 of the help), "Project Management" (part 4 of the help), "Quotes and Orders", etc.

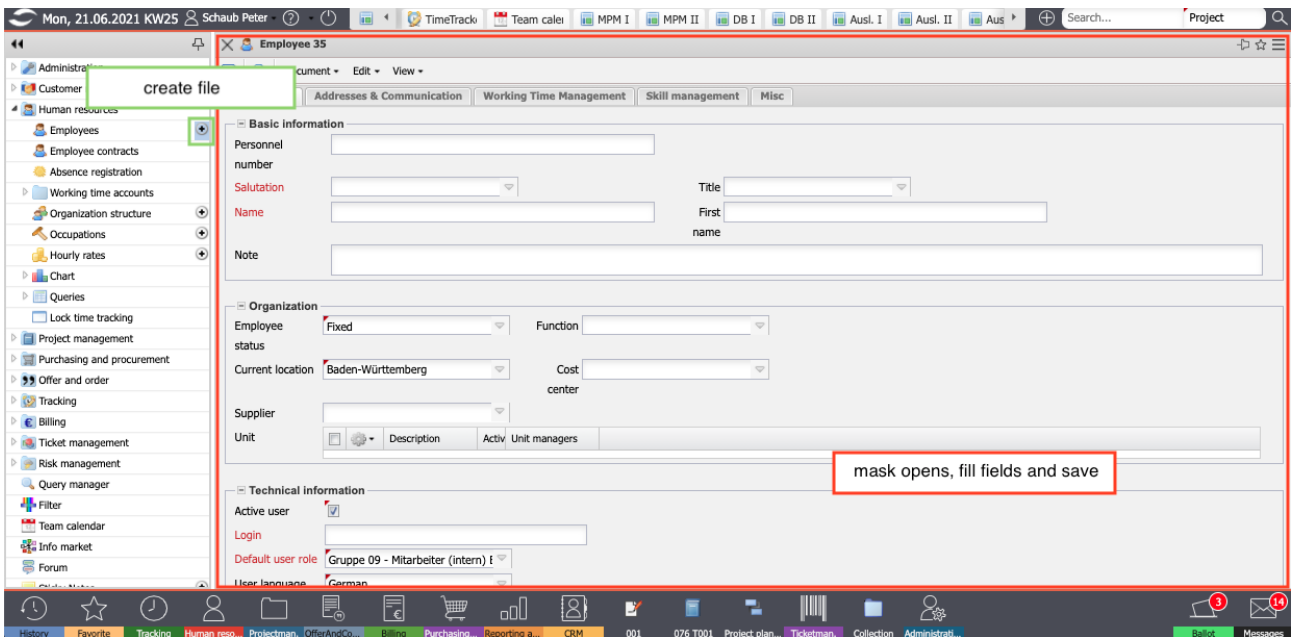
In the following example, first the menu "Personnel" is opened (click on the menu item) and then the employees (click on the entry "Employees"). A hit list with the created employees will then open. This hit list can be changed by the administrator in the Query Manager.



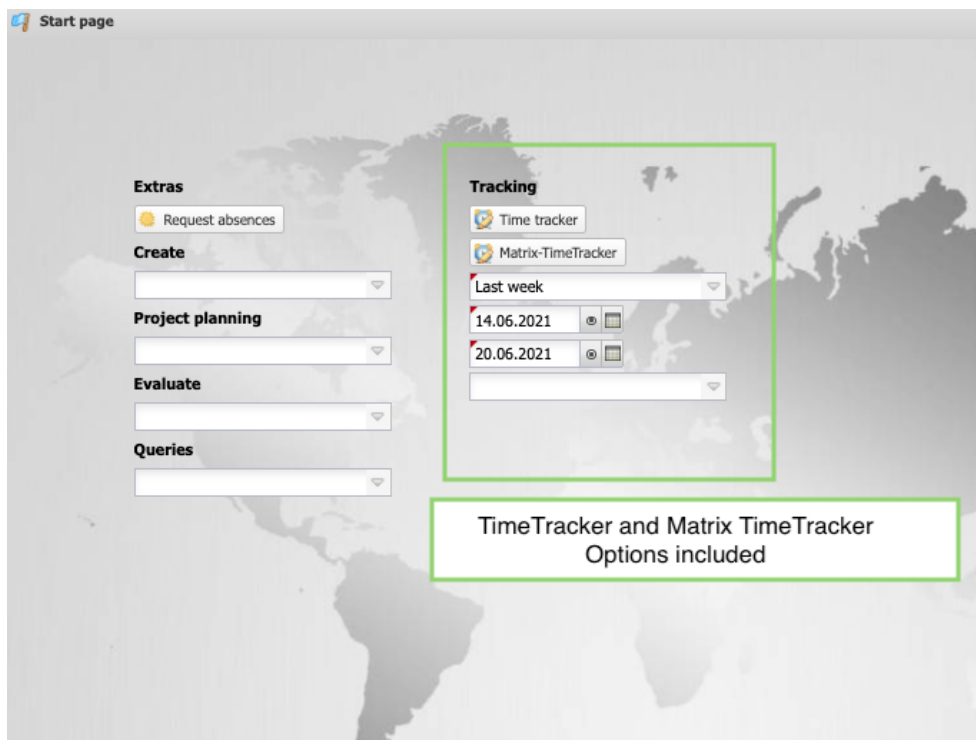
By clicking on a line in the hit list the data record of the employee opens in detail mode:



In the main menu, data can also be created with the "+" button (depending on the authorization):

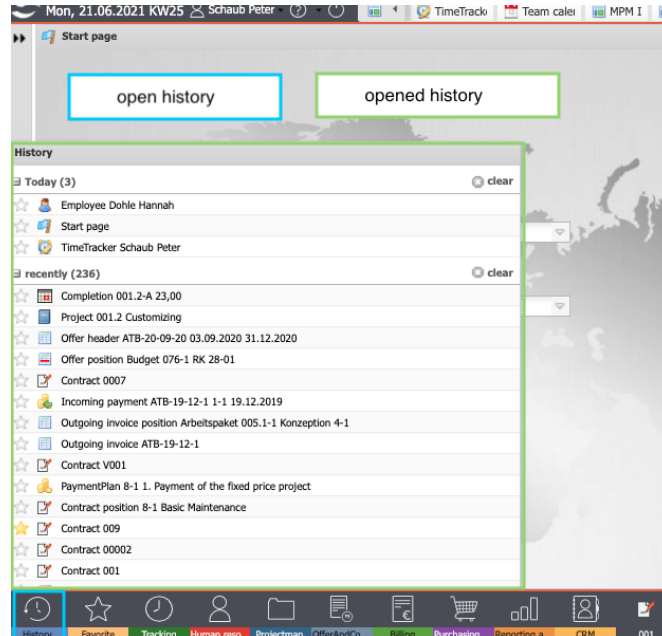


The standard start screen can always be brought to the foreground with the "Home Button" and contains among other things the "Request Absence", the creation of data (analogous to the "+-Button"), "Plan" for project planning, "Evaluate", "Query" and recording (TimeTracker and Matrix-TimeTracker including options):

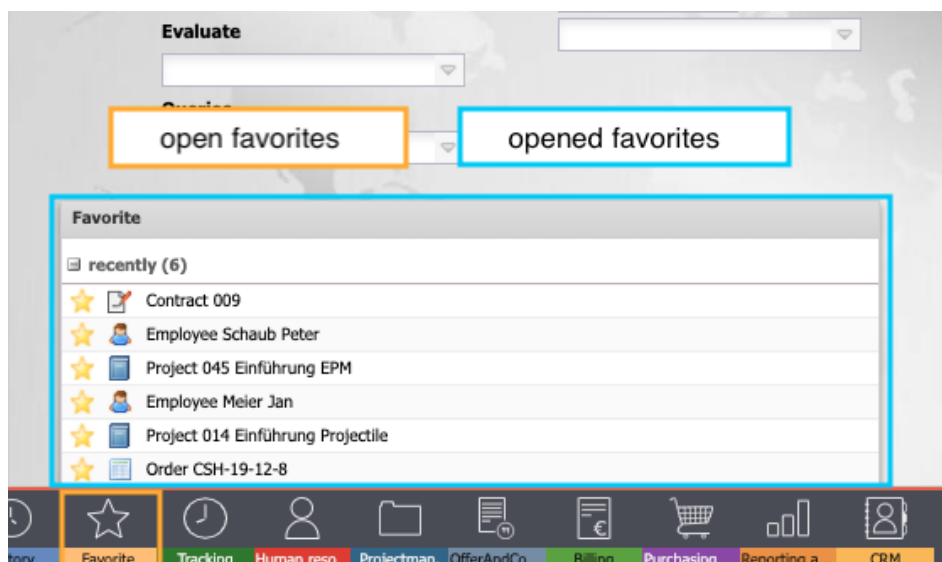


1.8 Dockbar

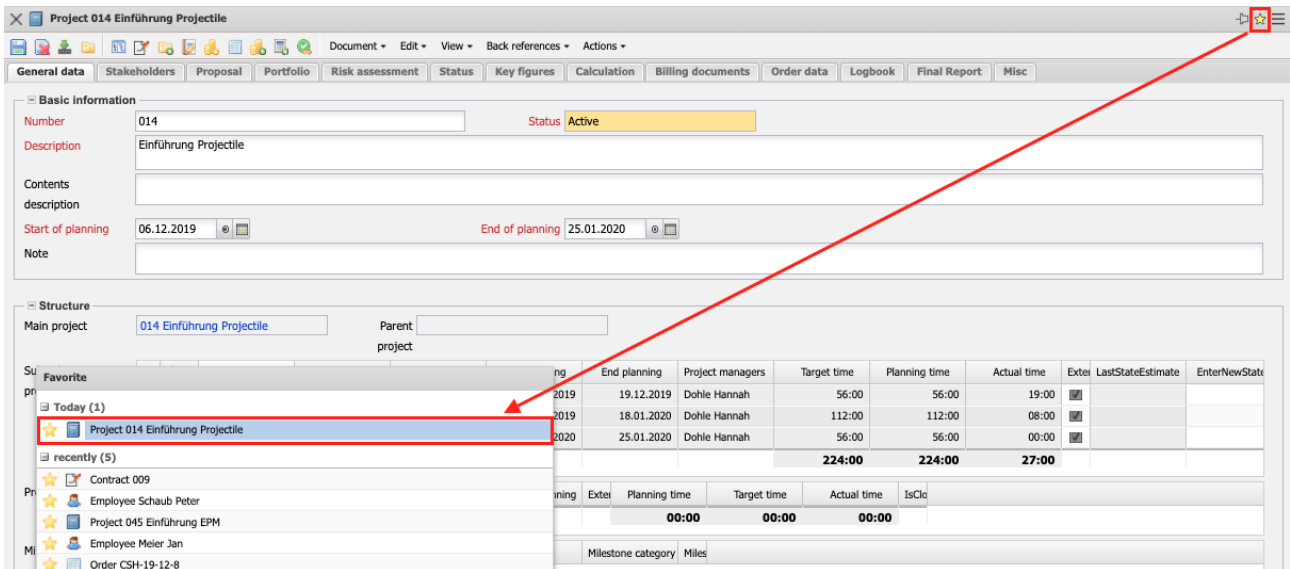
The lower horizontal area of the user interface is the "Dockbar". The dockbar contains the history, favorites, containers, polls and internal messages. Clicking on "History" opens the already opened data of "Today", "Yesterday" and "Recent" (day before yesterday or older):



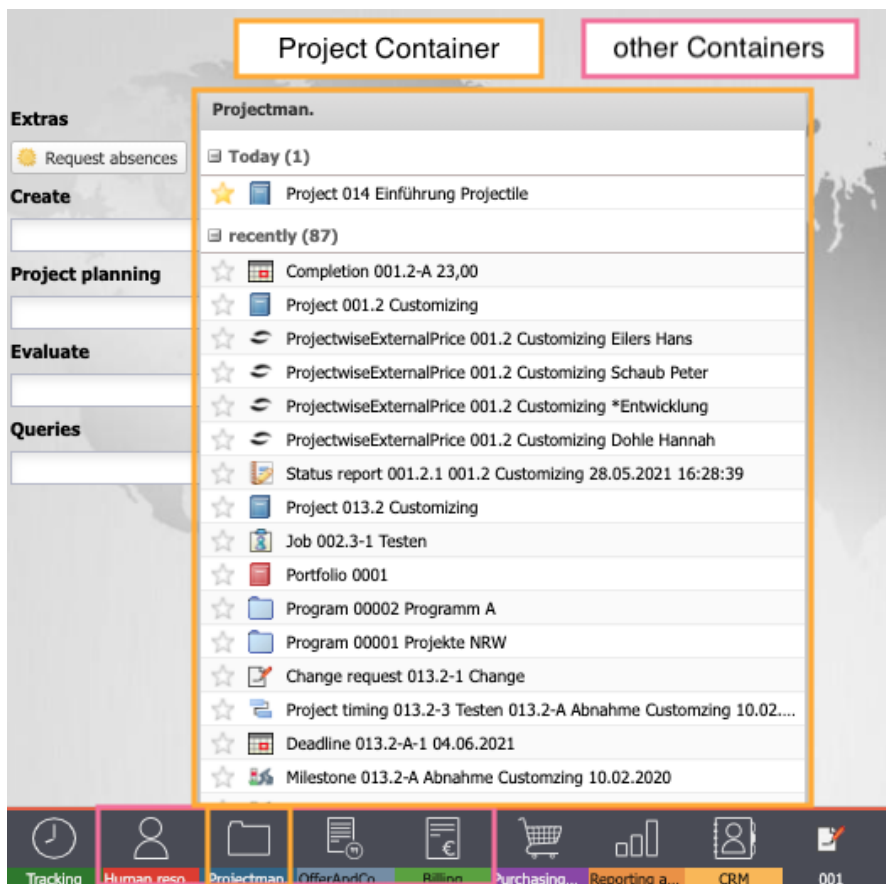
Clicking on "Favorites" opens the data that the user has marked as a favorite:



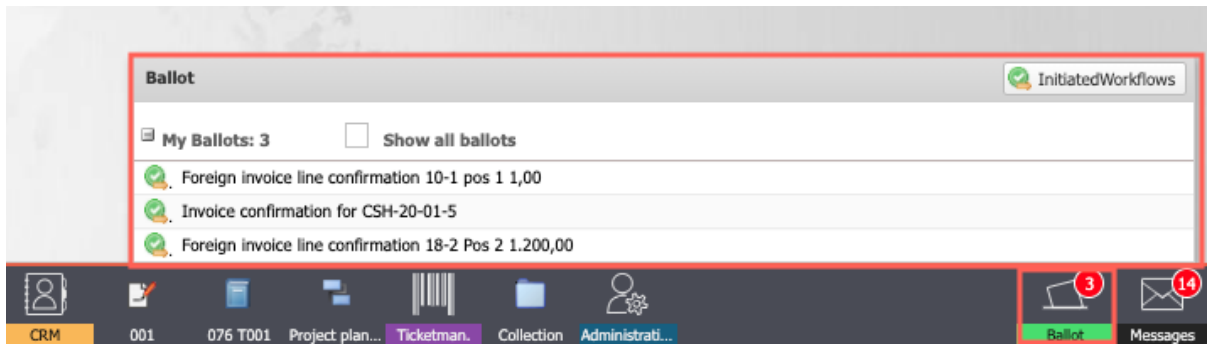
The favourites can also be marked directly in the mask with the "*-button":



By opening data from the different areas, the so-called containers are created. These containers contain subsets of the history:



The dock bar is completed by the "Reconciliation" function (for example, for approving vacation requests, checking travel expenses or releasing invoices) ...



... and the internal messages.

