

Release Documentation

inntact 7.0



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Release Notes

Note: This document describes the changes since Release intact 7.00.x

1 CRM

1.1 Campaign – addresses – save selected addresses/contacts

Sent	DE	EN	FR	Address Nr	Short Name	Name	Email
☒	☒	☐	☐	4007	Occasionsh	Occasionshandel Huber	
☒	☒	☐	☐	4007	Occasionsh	Occasionshandel Huber	
☒	☒	☐	☐	4007	Occasionsh	Occasionshandel Huber	
☒	☒	☐	☐	4012	Muster	Muster	m.muster@home.ch
☒	☒	☐	☐	4014	AG	AG	

1.2 Address Details – Items tab – New columns “Item History”

Order Date	Order Nr	Item Nr	Description	Qty	Selling Price	Selling Price FC	Discount	Line Total
07.03.2016	5005	00001	Stoppel	5.00	2.59	2.59	0%	12

1.3 Contacts Synchronization - Additional Folder selection to link In Outlook – Default Folder Contact

in tact 7 - [Test Mandant]

File Edit Tools CRM Help Logged in user: mre

CRM

Features

Addresses

Update Existing Object

Outlook Entry

Synch Contacts

Update Numeric fields

Contacts Synchronization

Please select which email account it should sync:

Default

Default

Contacts - l.alcorder@mre.ph

For Testing - l.alcorder@mre.ph

Lila Contact - l.alcorder@mre.ph

Sub_contacts - l.alcorder@mre.ph

Test_contacts - l.alcorder@mre.ph

Suggested Contacts - l.alcorder@mre.ph

Title	First Name	Last Name	Job Title
☐ Frau			
☐ Madam			
☐ Herr		Hean	
☐		William Koen	
☐		William Koen	
☐ Herr		Haller	
☐ Herr	Thomas	Haller	Export Manager ...

1.4 Contacts - Add new button Export .xls

CRM

Features

Addresses

Contacts

Contacts Schedules

Campaigns

Import Addresses

Import PDF

Search

Contact Key

First Name

Last Name

Position

Title

Comment 02

Comment 03

Comment 04

Address Nr.

eMail

Position

More Filters

Export.xls

Show All

Search

Previous

Next

Contact Key	Address Nr.	Title	Last Name	First Name	eMail	Position	Telephone	Comment 01	Memo	Date
4	4007	Herr	Huber	Leo		Lehring				

1.5 Addresses - No Mailing. Implement the checkbox "No Mailing" for Addresses, like we have it already for Contacts.

CRM

Features

Addresses

Contacts

Contacts Schedules

Campaigns

Import Addresses

Import PDF

Reports

List

Label

Card

Contacts

Planning

Tables

Groups

Document Sub Type

Employee

Performance Type

Address Details

Address Nr.

Title

Salutation

Short Name

Name

Address 1

Address 2

Address 3

Address 4

Zip / Place

Area / Country

Language

Email

Website

Telephone

Fax

Telex

Cellular

Pager

Phone II

Phone III

Created

Updated

Contacts

Member

No Mailings

Standort

Memo

Additional Fields

Additional Fields

Linked Addresses

Schedule

Documents

Order

Campaigns

Customer

Supplier

Object

Item History

Graphics

Calls

Open Items

Supplier Nr	Short Name	Supplier Name	Zip Code	Place	Country



2 Stocks

2.1 Set - extend from 3 to 10 level

Set Details

Set Number: 1 3.80.04.001

Set Description: Set

Set Group:

Buttons: Close, Save, New, Edit, Delete

S000003	inintact Workbench	1.00	0.00
H000002	Server	1.00	0.00
H000002	Server	1.00	0.00
0002	Rohr	1.00	36.20
D000002	Telefonsupport	1.00	0.00

2.2 Reports – Others – History List – Print Out

Comparison

Report

☒ Inventory worth per month ☐ Inventory worth per year ☐ Quantity on hand per month ☐ Quantity on hand per year

Filter

Date Range: yon: 01.01.2016 bis: 31.12.2016

Item Nr: yon: bis:

Item Group: yon: bis:

Income Account: yon: bis:

Price base on date:

Options

☐ Group by "Item Group"

Buttons: Close, Preview, Print, Export, Setup

2.3 Discount System – Allow to add new without using the item group.

Stocks

Features

- Items
- Transactions
- Purchase Order
- Inventory
- Item Entry all

Reports

- Items
- Inventory
- Purchase Order
- Others

Tables

- Items
- Purchase Order
- Others
- Discount Groups
- eGroup
- Discount System

Group

Group	Art. Op. / Discount	Group	2	3	4	5	6	7	8	9	10	11	12	13	14	15



- 2.4 Feature show/hide complete structure - Add +/- sign to header (left of item no.). If User clicks then open complete set structure (all items all levels). If user clicks then export then use this (this is already working now).**

Item Nr.	Description 1	Qty. on hand	Location	Locati.	Locatio.	Selling Price	Description 2	Qty on Order	Min. Order	Set Member	Min. Stock	Lx
1	H000001 Bildschirm	-4.00	-4.00	0.00	0.00	199.00		100.00	0.00	False	0.00	
2	S000003 intact Workbench	0.00	0.00	0.00	0.00	9.999.00		0.00	0.00	True	0.00	
3	S000002 intact Financial	0.00	0.00	0.00	0.00	2.470.00		0.00	0.00	False	0.00	
4	S000001 intact Sales	0.00	0.00	0.00	0.00	2.470.00		0.00	0.00	False	0.00	
5	S000002 intact Financial	0.00	0.00	0.00	0.00	20.116.30		0.00	0.00	False	0.00	
5.1	S000003 intact Workbench	0.00	0.00	0.00	0.00	9.999.00		0.00	0.00	True	0.00	
5.2	H000002 Server	8.00	8.00	0.00	0.00	9.999.00		0.00	0.00	True	0.00	
5.3	0002 Rohr	2.00	2.00	0.00	0.00	18.30		0.00	0.00	True	0.00	
5.4	0000002 Telefonsupport	0.00	0.00	0.00	0.00	100.00		0.00	0.00	True	0.00	
6	D000001 Dienstleistung Mitar.	0.00	0.00	0.00	0.00	200.00		0.00	0.00	False	0.00	

- 2.5 Transactions – show balance of other locations
Allow to add columns balance location 2 to 10
Title should be real location name**

Post Date	Entry Date	Inwards	Outwards	Price	Order Nr.	Comment	Location 01	Location 02	Location 03	Location 04	Location 05	Location 06	Location 07
09.03.2016	09.03.2016	120.00	0.00	0.00				200.00		120.00			
09.03.2016	09.03.2016	200.00	0.00	0.00									
09.03.2016	09.03.2016	150.00	0.00	0.00									
09.03.2016	09.03.2016	50.00	0.00	0.00									
07.03.2016	07.03.2016	0.00	3.00	199.00	5004								
07.03.2016	07.03.2016	0.00	-5.00	199.00	5004								

- 2.6 Update Item Price - Update Item Price - items without set and items with set. All price changes should be found in price history. Changing selling price but the factor does not change.**

Item Nr.	Description 1	Qty. on hand	Location	Locati.	Locatio.	Selling Price	Description 2	Qty on Order	Min. Order	Set Member	Min. Stock	Lx
9	H000002 Server	8.00	8.00	0.00	0.00	9.999.00		0.00	0.00	True	0.00	
10	S000004 intact Cloud Comp.	50.00	50.00	0.00	0.00	2.470.00		0.00	0.00	False	0.00	
11	D000001 Dienstleistung Mitar.	150.00	150.00	0.00	0.00	200.00		0.00	0.00	False	0.00	



3 Order

3.1 Order Details - Customer History - New Column "FC Price Currency" + other

Order

Features

Orders

Customers

Single Invoice

Serial Numbers

Transfer

Reports

Documents

Sales

Turnover

Others

Tables

Customer

CRH

Stocks

Order

Service

Objects

Header Header II Header III Header IV Header V Header VI Documents Open Item Planning

A/R Account: 1005 KST KT PC-Konto Document Type: 0001 Branch 01

Revenue Account: 3000 KST KT Handelsbetrag MWSt 8% ABC Code: Serial Number:

☒ Use Stocks Revenue Account as default ☒ Use VAT Category for the whole Order

VAT Category: 05 Ind. 8% - Verkauf Shipping Code: Condition: 2 10 Tage, 2% Skonto Link to Blanket Order:

Shipping Cost: Discount %: KST KT Date Created: Date Modified:

Pos. Item Nr. Description Extension Unit Price per unit Qty Ordered Discount

1	00001	Stöpsel	20mm x 25.3mm	Stk	2.59	5.00	0%
---	-------	---------	---------------	-----	------	------	----

Details Details II Backlog List Available Customer History Serial Number Objects Picture

Date Range: From: To: Item Nr: From: 00001 To: 00001 Income Account: Item Comment:

Order Nr: From: To: Item Comment:

Description	Qty	Selling Price	Selling Price in FC	Discount	Line Total	Purchase Price	Marge	Income Account	FC
Stöpsel	5.00	2.59	2.59	0%	12.95	2.59	0.00	3000	SFR

3.2 History List - Comparison Report

Print History File

Report

Customer ☐ Delivery Address ☐ Item ☐ Hit list ☐

Comparison Month ☐ Comparison Year ☐ Comp. Month Qty. ☐ Comp. Year Qty. ☐

Filter

Date Range: From: To:

Customer Nr: From: To:

Customer Name: Zip Code:

4.30.09.000

Close

Preview

Fast print

Export

Print

3.3 Order Overview accepts wildcards * and ?

Order

Features

Orders

Customers

Single Invoice

Serial Numbers

Transfer

Reports

Sales

Turnover

Search

Date Range: From: To: Order Nr: From: To:

Schedule: From: To: Extension 1

Customer Nr: From: To:

☐ Show Positions

☐ Show Positions by Schedule

Count: 1 Overa

Priority Nr.	Order Date	Order Nr.	Customer	FC Code	FC Total	Total in
0	07.03.2016	5004	Occasionshandel Huber	CHF	1,388.00	1,388.00



3.4 Position - allow discount 100% (free)

Details Details II Backlog List Available Customer History Serial Number Objects Picture

Item Nr.: H000001 ☒ Item from stocks

Description: Bildschirm

Extension: Modell: China 3000

Quantity: 5 TL

Unit:

Price: 199

Disc. %: 100.00

Vat Category: 07 Exkl. 8% - Verkauf

Accounts Nr.: 3000 KST KT Handelsvertrag

Schedule: S

Schedule Should: Split

Physical: 4.00 Reserved: 0.00 Disposabl: 98.00 Available: 94.00

Location:

Line Total: 0.00 CHF

Exch. Rate: 1

Total: 0.00 CHF

Save Cancel

3.5 Customers – Discounts - A customer could have a discount level for every existing item group. Customer details add tab "Discounts"

Order

Features

Orders

Customers

Single Invoice

Serial Numbers

Transfer

Reports

Documents

Sales

Turnover

Others

Tables

Customer

Order

Others

Order Comments Lookup

Header Header II Header III Header IV Header V Header VI Documents Open Item Planning

A/R Account: 1100 KST KT Forderungen (Debitoren)

Revenue Account: 3000 KST KT Handelsvertrag MWS 8%

Use Stocks Revenue Account as def ☒ Use VAT Category for the whole Order

VAT Category: 07 Exkl. 8% - Verkauf

Shipping Cost: % 0.00 KST KT

Discount %: % 0.00 KST KT

Document Type:

Branch:

ABC Code:

Shipping Code:

Condition:

Serial Number:

Date Created: 07.03.2016

Date Modified: 07.03.2016

Pos.	Item Nr.	Description	Extension	Unit	Price per unit	Qty Ordered	Discount	Qty Delivered	Qty Backlog	Line Total	Exclude from turnover
1	H000001	Bildschirm	Modell: China 3000		199.00	5.00	0%	3.00	2.00	995.00	
2	S000003	intact Workbench	Pendenzern verwalten Termine planen		990.00	1.00	0%	0.00	1.00	990.00	
3	5% Discount										-99.25

Add Line Discount

Disc. %: 5

Discount Text: 5% Discount

Cor. Discount %: 0

Cor. Discount Text:

Save Cancel

3.6 Order Totals - shown on Tabs 1-4

Order

Features

Orders

Customers

Single Invoice

Serial Numbers

Transfer

Reports

Documents

Sales

Turnover

Others

Header Header II Header III Header IV Header V Header VI Documents Open Item Planning

Order Number: 5004

Order Date: 07.03.2016 1610

Delivery Date:

Customer Nr.: 4007 OP: 1.184.10 Bonitat:

Occasionshandel Huber

Wiederverstrasse 200

CH - 4143 Domach 1

Contact Person:

Ordered By:

Order Nr.: 1231241234213

Ordered By 2:

Commission:

Salesman:

Object:

Close Order ☐

Exclude in Statistics ☐

Subscription-contract ☐

subscription-invoice ☐

AP ☐

Status 60 4.10.01.00

Item Total: 1,885.75 ☒

Discount: 0.00

Shipping Cost: 0.00

Delivery Condition: 0.00

Sub Total: 1,885.75

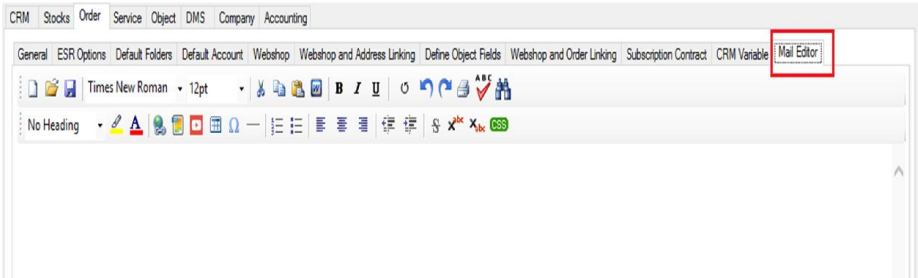
VAT: 150.85

VAT: 0.00

Order Total: 2,036.60 CHF

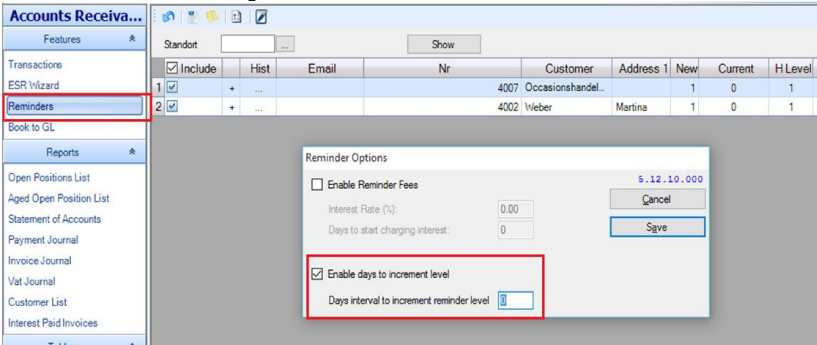
Pos.	Item Nr.	Description	Extension	Unit	Price per unit	Qty Ordered	Discount	Qty Delivered	Qty Backlog	Line Total	Exclude from turnover	Schedule	Prod. Item
1	H000001	Bildschirm	Modell: China 3000		199.00	5.00	0%	3.00	2.00	995.00			

3.7 Documents - eMail Editor – Add Standard text

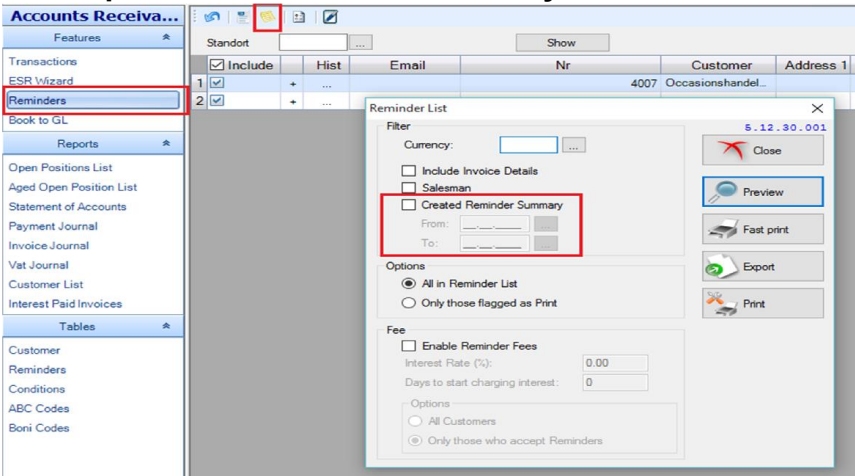


4 Accounts Receivable

4.1 Enter interval days to increment the next reminder level

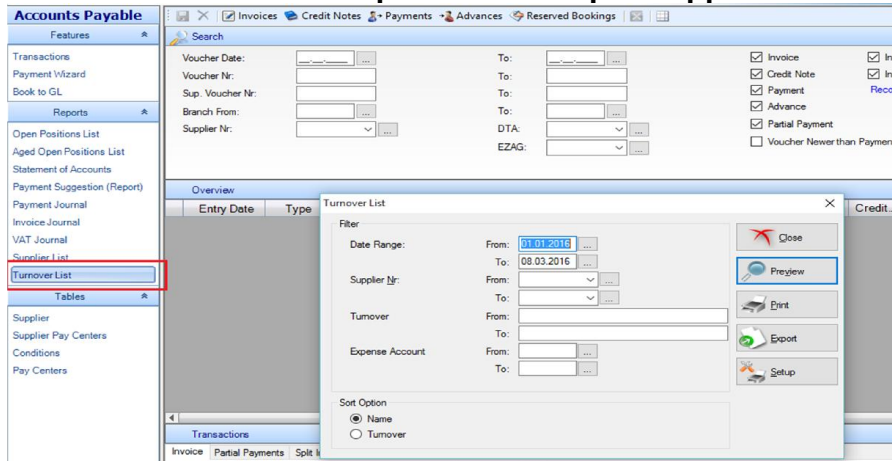


4.2 New report for the reminder summary.



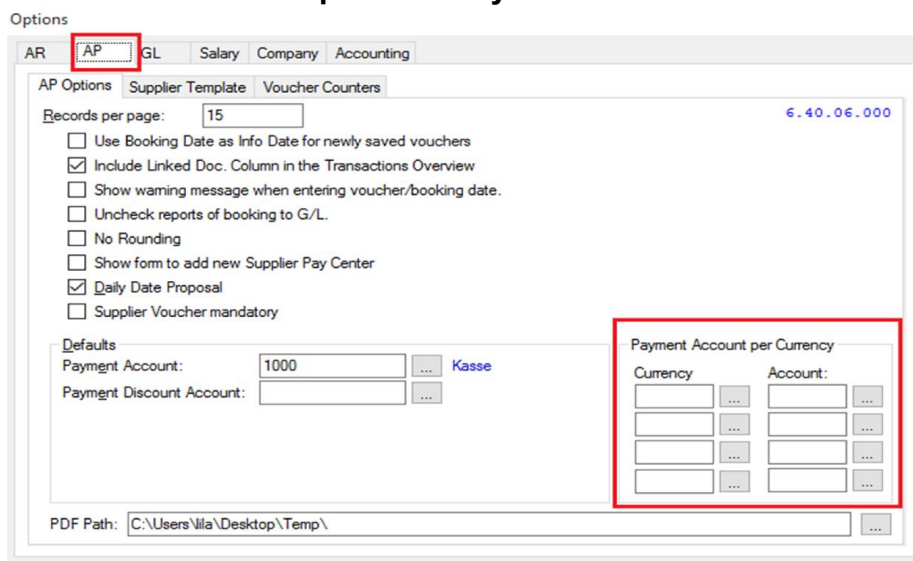
5 Accounts Payable

5.1 Turnover List – Create report Turnover per Supplier



The screenshot shows the 'Accounts Payable' window with the 'Turnover List' report selected in the left sidebar. The main window displays the 'Turnover List' filter and overview sections. The filter section includes fields for Date Range (From: 01.01.2016, To: 08.03.2016), Supplier Nr., Turnover, and Expense Account. The overview section shows a table with columns for Entry Date and Type. The 'Turnover List' report is highlighted in the left sidebar.

5.2 Allow to set account per currency.



The screenshot shows the 'Accounts Payable' window with the 'Options' tab selected. The 'AP Options' section includes checkboxes for various settings, such as 'Use Booking Date as Info Date for newly saved vouchers', 'Include Linked Doc. Column in the Transactions Overview', 'Show warning message when entering voucher/booking date', 'Uncheck reports of booking to G/L', 'No Rounding', 'Show form to add new Supplier Pay Center', 'Daily Date Proposal', and 'Supplier Voucher mandatory'. The 'Defaults' section includes fields for 'Payment Account' (1000) and 'Payment Discount Account'. The 'Payment Account per Currency' section is highlighted with a red box, showing a table with columns for Currency and Account.

5.3 New filter for EZAG in transaction overview

Accounts Payable

Features

Transactions

Payment Wizard

Book to GL

Reports

Open Positions List

Aged Open Positions List

Statement of Accounts

Payment Suggestion (Report)

Payment Journal

Invoice Journal

Search

Voucher Date: To: Invoice ☒ Include Closed ☒

Voucher Nr: To: ☒ Credit Note ☒ Include Booked

Sup. Voucher Nr: To: ☒ Payment ☒ Advance ☒ Partial Payment ☐ Voucher Newer than Payment Date

Branch From: To: DTA: EZAG: ☐ Record : 0

Overview

Entry Date	Type	Voucher Nr	Supplier Voucher	Supplier	Currency	Amount	Debit	Credit	Voucher D
------------	------	------------	------------------	----------	----------	--------	-------	--------	-----------

5.4 DTA/EZAG Payment wizard allow to create partial payment

Accounts Payable

Features

Transactions

Payment Wizard

Book to GL

Reports

Open Positions List

Aged Open Positions List

Statement of Accounts

Payment Suggestion (Report)

Payment Journal

Invoice Journal

VAT Journal

Supplier List

Turnover List

Tables

Supplier

Supplier Pay Centers

Conditions

Pay Centers

Due Date: 18.03.2016

Currency: CHF Swiss Franc

Supplier Nr: 4004 Computer Lieferant

DTA file

EZAG - automatic post payment

Pay Date: 09.03.2016

include vouchers due for cash discount

Don't group DTA Payments

CN 004555-00 Shanghai

Read

Incl.	Voucher	Supplier	Address 1	Address 3	ZIP/Place	Due Date	Currency	Amount	Discount	Credit	Partial Amount	Sup
☒	50005	Compu...	Shanghai Ro...	004555-00 Shan...	18.03.2016	CHF	300.00	14,700.00	0.00	0.00	0.00	CH00
☒	50000	Compu...	Shanghai Ro...	004555-00 Shan...	20.11.2011	CHF	12,000.00	0.00	0.00	0.00	0.00	CH00

Edit Payment Details

Payment: 100.00 CHF

Bank Amount: 0.00 CHF

Discount taken: 14,700.00

Discount Account: 0.00

Credit Amount: 0.00

Partial Amount: 0.00

Partial Account: 0.00

Supplier Paycenter: CH00 7777 4111 4444 1111 V

Use ESR Information

Invoice Details

Voucher Nr: 50005

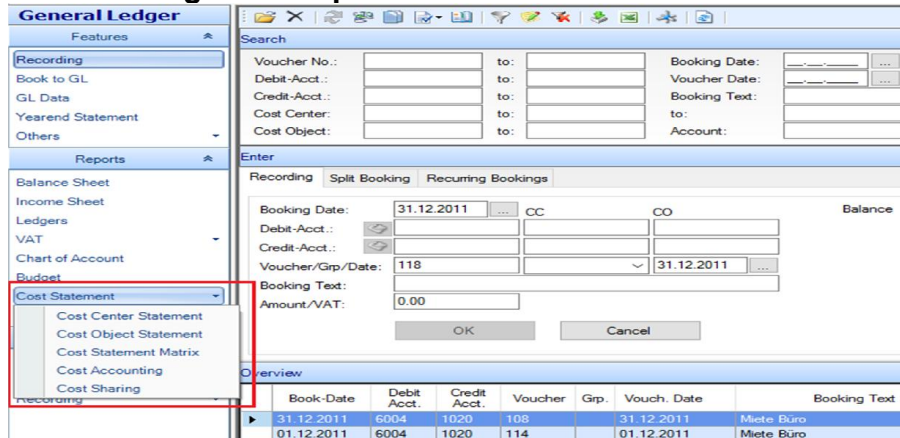
Supplier: Computer Lieferant

Voucher Date: 08.03.2016



6 General Ledger

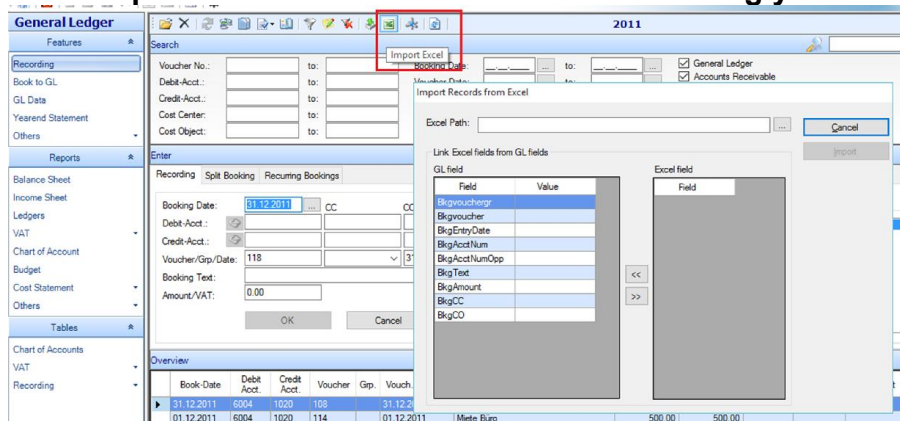
6.1 Cost Sharing - New report



The screenshot shows the 'General Ledger' application window. On the left, the 'Reports' menu is open, and 'Cost Statement' is selected. The main window displays the 'Enter' tab for recording a transaction. The 'Booking Date' is set to 31.12.2011. The 'Debit-Acct.' is 6004, and the 'Credit-Acct.' is 1020. The 'Voucher/Grp/Date' is 118. The 'Booking Text' is 'Miete Büro'. The 'Amount/VAT' is 0.00. The 'Overview' table at the bottom shows the following data:

Book-Date	Debit Acct.	Credit Acct.	Voucher	Grp.	Vouch. Date	Booking Text
31.12.2011	6004	1020	108		31.12.2011	Miete Büro
01.12.2011	6004	1020	114		01.12.2011	Miete Büro

6.2 Import from xls - Column in xls file should be link to database. Don't import record if date is not within accounting year



The screenshot shows the 'General Ledger' application window with the 'Import Excel' dialog box open. The 'Import Records from Excel' dialog has the 'Excel Path' field set to 'C:\Program Files\Microsoft Office\Office12\Excel.xls'. The 'Link Excel fields from GL fields' section shows a list of GL fields and their corresponding Excel fields. The 'GL field' list includes: BkgVoucher, BkgEntryDate, BkgAcctNum, BkgAcctNumOpp, BkgText, BkgAmount, BkgCC, and BkgCO. The 'Excel field' list is empty. The 'Import' button is highlighted.

7 Salary

7.1 Allow to set decimal digit per social insurance in salary.

Options

AR AP GL **Salary** Company Accounting

Salary Information Salary Transaction Setup Options

Year: 2011

Company ID:

AHV Nr: 0

SUVA Nr: 0

KK Nr: 0

Age

Starting age for AHV: 18

Retirable Male: 65

Retirable Female: 64

ALV1

Premium EE: 1.10 Decimal Digit: 2

Premium ER: 1.10

Max Salary: 126'000.00

ALV2

Premium EE: 0.50

Premium ER: 0.50

Max Salary: 315'000.00

Decimal Digit: 2

AHV

Premium EE: 5.15

Premium ER: 5.15

AHV Exempt Retiree: 1'400.00

SUVA

NBU Premium Male: 1.4500

NBU Premium Female: 1.4500

Max. Salary per Year: 126'000.00

7.2 Allow to delete period.

Salary

Features A

Salary

Employees

Salary Payment

Book to GL

Holiday

Reports A

Monthly Reports

Annual Reports

Payroll

New

Open

Close

Delete

Re-create

Undo

Add 13th Salary Period

Add 14th Salary Period

Zip Code

Address 1

Address 3

Place

Address 2

Address 4

Status

Close

Add Employee

Preview

Print

Recreate Selected Employees

Address 1	Address 2	Address 3	Zip and Place	Net Payment	Pay Center	Total Vacation	Used Vacation
Hans	Braunsche 120	6000 Luxemb 1 Ann...	6484.40			0	

8 Service

8.1 Transfer to Order - Option item number/performance type - add option for default.

Transfer to Order Processing

Date Filters
From: 08.03.2016 To: 08.03.2016

	Cusnum	Cusname	Cuszipc	Cusplace	Invoice Date	Total Amount	Expenses Account
☒					08.03.2016	200.00	1005

31.70.10.000

Close

Transfer

Invoicing

Change Customer

Undo Transfer

Invoice Date: 08.03.2016

Option

☒ Performance Type

☒ Item No

8.2 DA Automatic Email – Reminder

CRM Stocks Order **Service** Object DMS Company Accounting

Planning **Daily Activities** Default Folders Outlook/Schedule field linking Define Planning Fields Ballon box help Configuration Ca

Transfer to Order - Options

☐ Performance Type

☒ Item No

Nightshift Premium Pay

Additional effort : 25 %

Time From : 20:00

Time To : 06:00

Sunday Premium Pay

Additional effort : 50 %

Should hours per week:

eMail Report Option

☐ Activate eMail Report

Send eMail to: 1:

2:

3:

FROM Name:

☐ Open Item Only

8.3 Planning view - Allow to scrolling weeks or month in horizontal (same with outlook).

Service

Features

Planning

Activity Reporting

Open Items

Meetings

Transfer to Order Processing

Reports

Planning

Activity Reporting

Open Items

Tables

Tables

January 2016

Mo. Di. Mi. Do. Fr. Sa. So.

53 29 29 30 31 1 2 3

1 4 5 6 7 8 9 10

2 11 12 13 14 15 16 17

3 18 19 20 21 22 23 24

4 25 26 27 28 29 30 31

5 1 2 3 4 5 6 7

Today: 10.03.2016

Address Nr

Subject

Order Nr

Color

Object Nr

Date 4

Table A

Comment 2

Performance Type

Table B

Status

Status II

Date 2

Performance Type

January 2016

Montag 28. Dez 29

Dienstag 30

Mittwoch 31

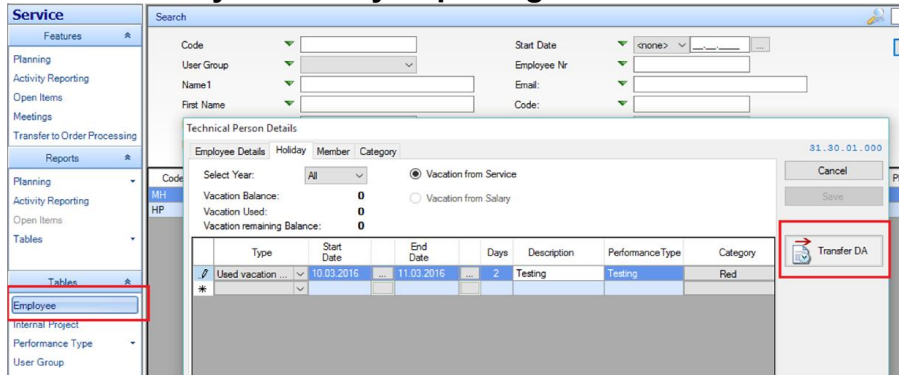
Donnerstag 1. Jan

Freitag 2

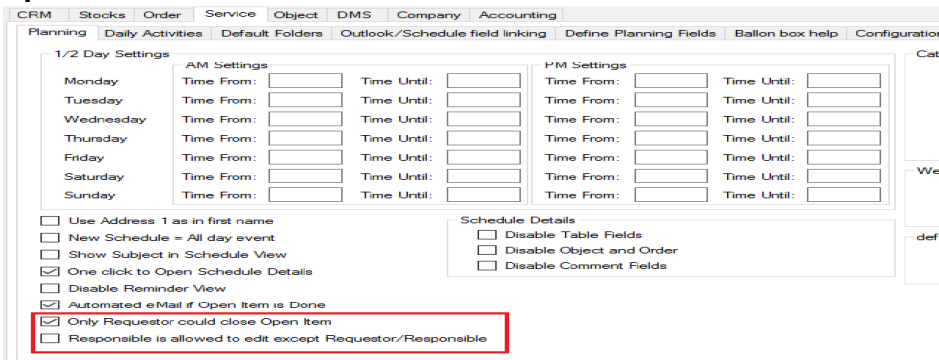
Samstag

8.4 Employee Details – new button

Implement a new button "Transfer DA" for transferring these entries directly to Activity Reporting.



8.5 Open Item – Addition options – Option “only requestor could close OI”- if checked then the OI could only be closed if the logged in user is equal to the requestor. Option "responsible is allowed to edit except requestor/responsible" - if logged in user is not responsible or requestor then nothing could be edited. User add checkbox “can change all OI any time” - this user is always allowed to do anything regardless of above options.



8.6 Holiday Options - It should be possible to enter the official holidays (x-mas, eastern, etc) within service options. This would then be standard DA records for all employees.

