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2.02.03 Work Package

The mask **work package** manages the individual work packages of the projects. Work packages are the lowest level in the work breakdown structure and assign exactly one employee an activity (task/operation) for which this employee is responsible within the project. A work package can be assigned to a sub-project as well as to a super- and/or main project. This mask shows the time period, the planned effort and the already invoiced time of the work packages, as well as the actual end. For online time recording, it is possible to sort the work package either by priority or due date (plan end).

The screen consists of the following elements:

Master Sheet

Arbeitspaket 045.2-6 Programmierung

Basisinformationen

Arbeitspaket-Nr. 045.2-6 Vorgangs-Nr. 045.2-3

Plan-Beginn 18.10.2019 Plan-Ende 25.10.2019

Bezeichnung Programmierung

Bemerkung

Ist-Ende

Zuordnung

Hauptprojekt 045 Implementierung bei CS Projekt 045.2 Anpassungen Vorgang 045.2-3 Programmierung

Mitarbeiter 008 Jansen Olivia Unit Firma 1

Tätigkeit Programmierung - Java Tätigkeiten Skill-Level

Stundensätze

ext. Stundensatz EUR ext. Stundensätze Quelle ext. Stundensatz Mitarbeiter 008 Jansen Olivia

int. Stundensatz EUR

- **Basic Information:**

- **Work Package and Process Number:** these alphanumeric fields are the numbers of the defined work packages and are usually derived from the corresponding project number.
- **Plan Start/Plan End:** The plan start field indicates the start for processing the work package and is determined by the plan start of the assigned project start. The Plan end field indicates the due date of the work package and is preset with the plan end of the project end.
- **Description:** This field indicates the work package description.
- **Comment:** This field allows you to enter comments on the work package.
- **Actual End:** This field indicates the completion date of the work package. The work package must be completed by the processor or project manager after the tasks have been completely processed. A work package must be completed either in the document itself or from the time recording component.

- **Zuordnung:**

- **Hauptprojekt:** Dieses Feld dient der Eintragung des Hauptprojektes.

- **Projekt:** Dieses Feld definiert das Projekt, zu dem das definierte Arbeitspaket gehört. Ein Arbeitspaket kann sowohl einem Hauptprojekt als auch einem Unterprojekt zugeordnet werden. Die Projekte können in dem Dokumenttyp Projekte definiert und geändert werden. Anmerkung: Ein Arbeitspaket muss nicht zwingend einem Projekt zugeordnet werden; Arbeitspakete ohne Projekt werden allerdings nur bei den mitarbeiterbezogenen Auswertungen berücksichtigt und nicht bei den Projektauswertungen.
- **Vorgang:** Verlinkung des Arbeitspaketes zum zugehörigen Vorgang
- **Mitarbeiter:** Dieses Feld definiert den Bearbeiter des Arbeitspaketes. Die Mitarbeiter können in dem Dokumenttyp Mitarbeiter definiert und geändert werden. Anhand dieser Zuordnung werden bei der Leistungserfassung jedem Mitarbeiter nur die Arbeitspakete angezeigt, für die er verantwortlich ist und die noch nicht abgeschlossen sind.
- **Unit:** Hier kann eine verantwortliche Unit für das Arbeitspaket eingegeben werden. In der nächsten Version kann das Arbeitspaket auch nur dieser Unit zugewiesen werden. Diese Organisationseinheit wird in der Maske Unit definiert.
- **Tätigkeit:** Dieses Feld definiert die Tätigkeit des Mitarbeiters im Rahmen des Arbeitspaketes. Diese Tätigkeit bestimmt in der Regel die **Kosten-** und **Preisfindung** und wird darüber hinaus für das Vorschlagswesen verwendet. Die Tätigkeiten können in dem Dokumenttyp Tätigkeiten definiert und geändert werden.
- **Tätigkeiten Skill-Level:** Derzeit ohne Verwendung in der Standardversion
- **Hourly Rates:**
 - **Ext. Hourly Rate:** Here you can enter the external hourly rate of the work package if the hourly rate differs from the normal pricing.
 - **Ext. Hourly Rates:** If the hourly rate differs from the normal pricing, you can enter the external hourly rate for the work package here.
 - **Source Ext. Hourly Rates:** This field shows which external hourly rate is used for this work package.
 - **Int. Hourly Rates:** The internal hourly rate of the work package can be entered here if the hourly rate differs from the normal cost determination. For example, for work packages of external employees, travel times or on-call times.

Status

Kennzahlen	
Sollaufwand	40:00 5,000 Pt
Istaufwand	20:00 2,500 Pt
Restaufwand	18:00 2,250 Pt

Planaufwand	
40:00	5,000 Pt

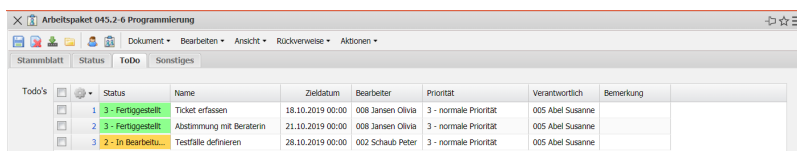
fakturierbarer Aufwand	
20:00	2,500 Pt

fakturierter Aufwand	
00:00	0,000 Pt

- **Status:** In this field you can enter the processing status for the work package. The following selections are possible (Completed, Entered, In work, Late). This field can be filled by the user.
 - **Priority:** This field indicates the priority of the selected work package. The higher the priority, the higher the work package is displayed (if the display is to be based on the priority criterion).

- **Key Figures:**
- **Target Effort:** This field is determined by the system during planning and defines the expected project duration in hours or days. During planning, this value is updated (analogous to the planned effort) and when planning is completed (status transition to “advance work” or “active”), this value is not changed.
- **Planned Effort:** This field defines the estimated net time effort of the work package. The cumulated plan values of all work packages of a project are the basis for costing and controlling (plan/actual comparisons).
- **Actual Time:** The content of this field shows how many hours have been posted to this work package so far in the time recording component.
- **Billable Effort:** This value shows the billable effort of the work package. This value can be entered in the time recording component or in the **“Billable Hours”** dialog.
- **Billed Effort:** This field displays the number of hours that have already been billed in the invoices for the project. This field is determined automatically when the invoice is billed.
- **Remaining Effort:** This field shows the last defined remaining effort in hours from the **TimeTracker** entry component. The value from the work packages is cumulatively transferred to the projects.

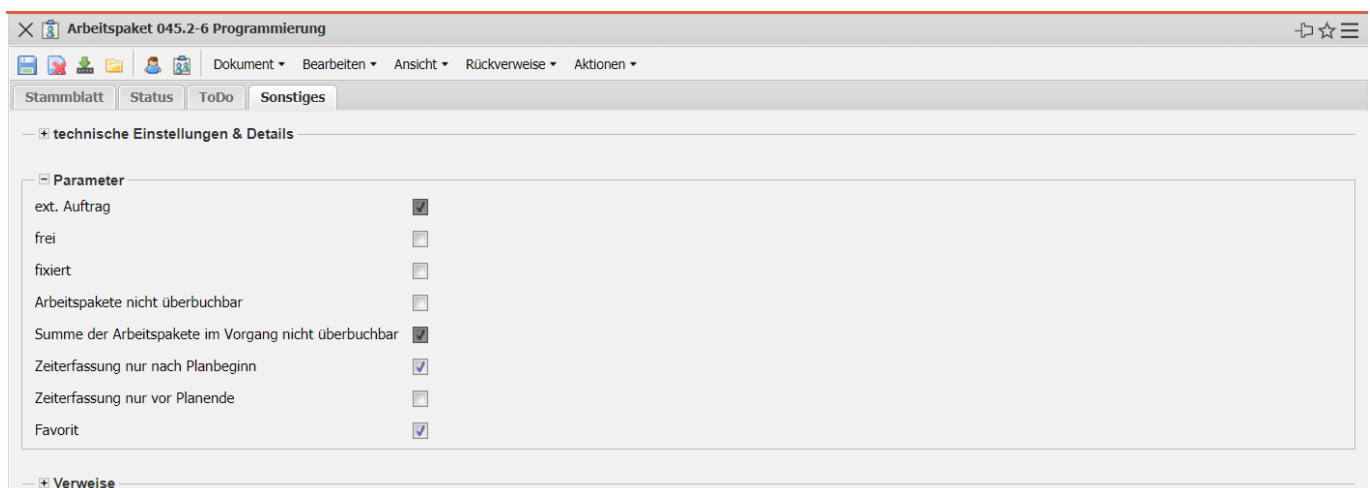
To Do



ToDo's	Status	Name	Zieldatum	Bearbeiter	Priorität	Verantwortlich	Bemerkung
1	3 - Fertiggestellt	Ticket erfassen	18.10.2019 00:00	008 Jansen Olivia	3 - normale Priorität	005 Abel Susanne	
2	3 - Fertiggestellt	Abstimmung mit Beraterin	21.10.2019 00:00	008 Jansen Olivia	3 - normale Priorität	005 Abel Susanne	
3	2 - In Bearbeitung	Testfälle definieren	28.10.2019 00:00	002 Schaub Peter	3 - normale Priorität	005 Abel Susanne	

- **Status:** The status of the first to do created is entered in this field. If the first to do has one of these statuses (Created, In process, Completed, Cancelled), it is also displayed in the upper “Status” field. If the status of the first to do is changed, the status in the upper field also changes.
- **ToDo's:** Any number of to-dos with different specifications can be created in these fields.

Miscellaneous



technische Einstellungen & Details	
Parameter	
ext. Auftrag	☒
frei	☐
fixiert	☐
Arbeitspakete nicht überbuchbar	☐
Summe der Arbeitspakete im Vorgang nicht überbuchbar	☒
Zeiterfassung nur nach Planbeginn	☒
Zeiterfassung nur vor Planende	☐
Favorit	☒

- **Technical Settings & Details:**
 - **int. Key:** This numeric field uniquely identifies the work package. This number is

proposed by the system.

- **Resource:** If a particular resource is required for the work package, you can select it here.

- **Parameters:**

- **External Order:** This field indicates whether the work package is external, that is, billable. If the selection box is activated, the selected work package is an external task, otherwise it is an internal one. This selection is preset for all work packages for external projects. Example: An external development sub-project contains a "Test" work package which is not to be billed to customers. The external indicator is then not set for the work package.
- **Free:** This element marks the work package as a free task. If this indicator is set, any employee can, in principle, adopt this work package in the time recording component (TimeTracker).
- **Fixed:** This checkbox can be used to specify that the work package is fixed. This functionality is required for top-down planning or when fixing projects in project planning. This functionality is used within forward or backward planning to protect these elements from being shifted (see also Section [Scheduling](#)).
- **Work Package cannot be overbooked:** If this field is set, an entry about the planned effort in the time tracker is prevented by a corresponding message.
- **Total Work Packages in the Process cannot be overbooked:** This indicator controls the properties of the work packages in the operation. If this indicator is set, you can only enter data for the work packages in the time tracker as long as the planned effort has not been exceeded.
- **Time Recording only after Plan Start:** This indicator controls the properties of the work packages in the project. If the indicator is set, you can only record time in the time tracker for the work package if the start of the work package has been reached.
- **Time Recording only before End of Plan:** This indicator controls the properties of the project work packages. If the indicator is set, you can only record time in the work package's time tracker as long as the end of the work package has not been reached.
- **Favorite:** This indicator is required for favorites management in the TimeTracker.

- **References:**

- **Components, Change Requests (Optional):** When using the "Product Documentation" module, links to the product structure and change requests can be stored here..

Actions

The document class contains the following actions:

- **Suggestion System:** You can use this action to create a proposal list for processing the defined work package. The system uses the activity and the time period to determine all employees who are suitable for this task based on their skills and displays their capacities in the relevant time period..
- **Display Hourly Rates:** Use this action to display the internal and external allocation rates and see where they are stored.
- **Edit Process:** You can use this action to open the dialog for processing operations. Here you can edit basic values for the operation, assign several employees for the work package and view the workloads of the employees.

- **Negate Favorite Flag:** This action sets the favorite flag (see above) if it was not set or removes the flag if it was set. This action can be assigned rights using an ACL.

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