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# Glossary

## Process Planning

A schedule in [project management](#) is the chronological and logical arrangement of the [work packages](#) of a project. The result of this process planning is the [network](#) and is visualized with the help of the Gantt chart. In Projectile, project sequences are defined in the document [jump order](#) and realized in the [project evaluation](#).

## Offer

An offer contains at least the description of the services to be provided (service specifications, performance specifications) and the calculation of the price to be paid by the client for these services. When submitting a binding offer, the Provider undertakes to carry out the order if the offer is accepted by the Customer. In the case of binding offers, details of payment and delivery conditions and the offer binding period are required.

## Relationship

A relationship denotes the quantifiable dependency between events or activities (for example, between two [work packages](#) of a [project](#) or between two subprojects - see also DIN 69900-1). These relations are defined in Projectile for the visualization of [scheduling](#) in the document [jump order](#). In practice, the following relationships are often used:

- Normal Sequence (End - Start)
- Start Sequence (Start - Start)
- End Sequence (End - End)
- Jump Sequence (Start - End)

## Work Package

A work package is exactly the activity that a [staff member](#) performs for a [project](#) in a certain time. A work package is that part of a project which is not further subdivided in the [WBS](#) and can be on any level of structure (see also DIN 69901). To achieve the [Project goal](#), it is necessary to process all work packages. In Projectile the work packages are defined in the document type [work package](#). Project times can only be posted in the system to work packages and not to projects.

# Client (= Costumer)

A client is the person responsible for a [project](#). The principal approves the project budget and the [framework dates](#). In Projectile the clients are managed in the document type [contact](#). The person responsible for the project is in the role of the contractor vis-à-vis the client of the project. In project management, contract management and procurement deals with the relationship between the roles of the ordering party and the contractor.

# Contractor

In commercial terms, the contractor is the seller of a product or service. He is the contractual partner of the [client \(= customer\)](#) who purchases the service agreed in the order.

# Effort

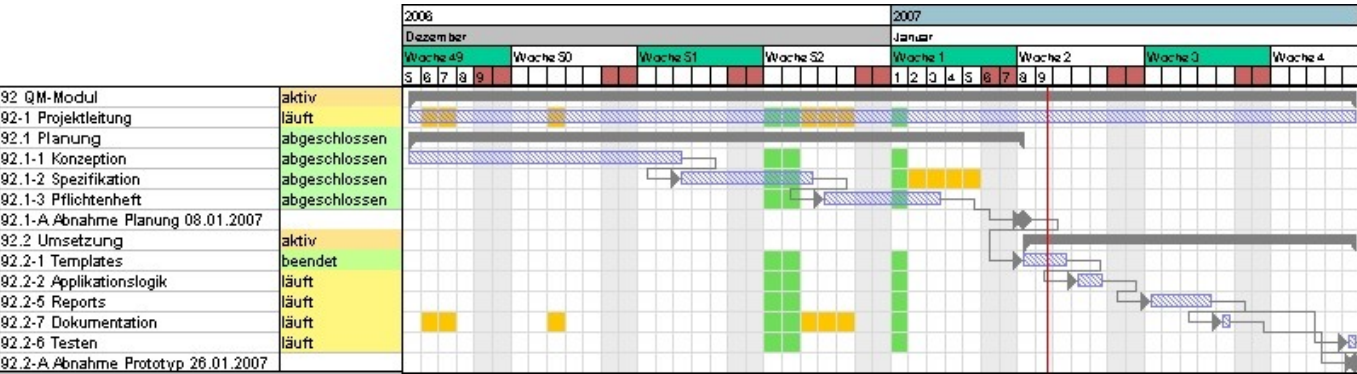
The effort of a [work package](#) describes (colloquially) the amount of work necessary to produce a defined work result. Unit: person days (PT), person hours (PH).

# Estimate of Effort

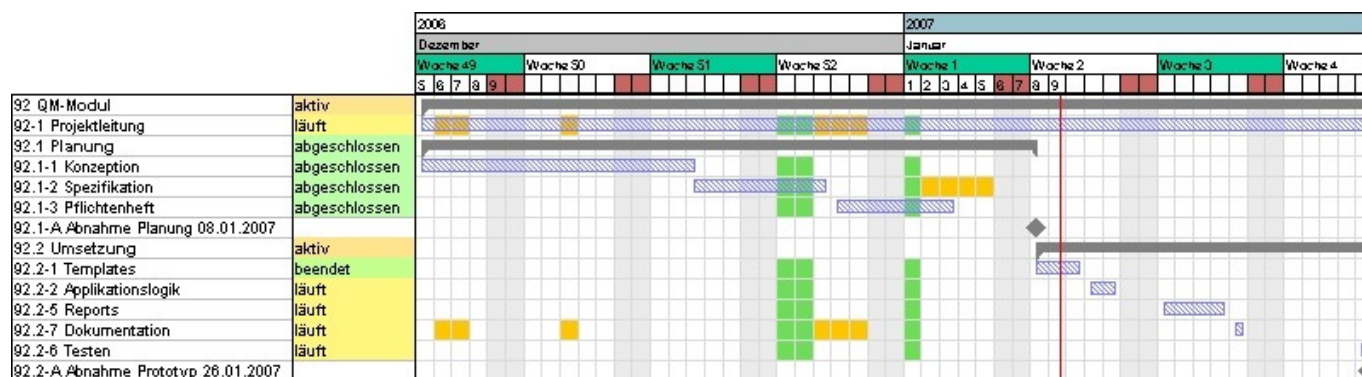
An estimate of effort is the estimate of the effort required to process a [work package](#). It is based on the experience of the [project employee](#) and is the basis for [capacity](#) and [scheduling](#). In Projectile you can estimate the target times (i.e. the effort) at project and work package level.

# Gantt Chart Network (= Networked Gantt Chart, Network Gantt)

A Gantt chart is an extension of the Gantt chart for displaying the dependencies between [work packages relationships](#) and visualized in [project evaluation](#).



Gantt chart (= Gantt diagram) A Gantt chart is a diagram to visualize the time schedule of a [project](#). The duration of a [workpackage](#) or project is symbolized by the length of the bar in the time axis. The bars can include both actual and target data. Events or [milestones](#) are represented as points in time. In Projectile, processes are visualized in [project evaluation](#).



## Basic Plan

The basic plan comprises all data of an approved project plan on a certain key date (usually release or order placement). The baseline plan contains at least dates, durations, efforts and costs.

## Budget, Project Budget

According to DIN 69903, the financial resources made available in a project are the project budget. From an enterprise's point of view, the project budget includes all expenses (that is, personnel costs, travel expenses, external services, material costs, depreciation, and so on) or (from the project manager's point of view) only the funds available to the project manager for project-specific procurements. In Projectile any number [budgets](#).

## BottomUp Planning

BottomUp planning means project planning according to the [BottomUp principle](#). In Projectile the BottomUp planning is used by default. Here the activities, processes, times and costs are not planned in detail at project level, but are started from the work packages. After the rough project planning (definition of upper and lower project without exact time and cost planning) the work packages are defined concretely. By selecting the project, employee, activity and duration, the internal and external costs and duration are determined (see also [pricing](#)). These values are assigned to the assigned projects and are passed on to the next project level. All internal and external costs of a sub-project are passed up to the respective top project until the top project (root of the project tree) is reached.

## BottomUp Principle

In project management, the bottom-up principle is the general procedure for processing or planning

from work packages to the top project (i.e. from bottom to top: work package - subprojects - top project). An alternative to the BottomUp principle is the TopDown principle.

## Controlling

Controlling is a management subsystem within the company, whose core function is the acquisition, processing and analysis of data in preparation for target-oriented decisions. Project controlling is in turn a subsystem of controlling, which is limited to one or more projects.

## CPI

The CPI (Cost Performance Index) is the cost-related performance indicator of Earned Value Analysis. It is formed from the ratio of earned value and actual expenses. This means that if the CPI is greater than 100% (or 1.00), the project results were achieved at lower cost than originally planned, whereas if the CPI is less than 100% (or 1.00), the project is over budget.

## Earned Value Analysis

Earned value analysis is a method of making the progress of a project measurable and predictable at any time. The key figure used to do this according to this method is also referred to as earned value. From the three basic variables of earned value, planned and actual expenses, the cost variance, the schedule variance as absolute variables and the cost performance index (CPI) and the schedule performance index (SPI) as relative variables are determined.

## Resource Planning (= Capacity Planning)

Resource planning is the planning of the temporal deployment of the resources involved in the project execution, depending on their availability. In Projectile, the planning components consist of the calculation of the free capacities of the individual [employees](#), as well as the planning of the resources.

## Degree of Completion

The degree of completion of a [work package](#) or [project](#) corresponds exactly to the percentage at which the work on a work package or project has been completed. Quantitatively, the POC is the quotient of the actual time and the target time. Qualitatively, it is the percentage at which the project or work package has been completed in terms of content. The status of a project can be determined by the difference between these ratios. In Projectile, qualitative degrees of completion for projects can be defined in the document type [degree of completion](#). The project status and degrees of completion are documented in the project documentation and in the automatically generated status reports.

## Progress Report (= Status Reports)

Status reports are an important part of project management and project controlling. They document the progress of the individual subtasks in the project plan. It is clearly visible who is working on what, how far the task has progressed, or what problems or obstacles may exist. Furthermore, due dates are shown and the next upcoming tasks are included. Status reports are distributed to the project manager and all project participants, and form the basis of the status meetings.

## Release

Depending on the context, release means the approval of a project, the release of an item for specific purposes or the granting of certain rights to a person. In project management, approval is the permission to carry out subsequent work of a specified content. A release is often associated with quality control and is usually defined as a milestone in the project plan.

## Actual Costs

In business cost accounting, actual costs are the costs actually incurred in a previous accounting period. In project management, actual costs are the total costs actually incurred in a project, subproject, or work package on a particular key date. Together with planned costs and progress, actual costs are important key figures for controlling (budget control, earned value analysis, etc.).

## Calculation

In accounting, costing is the process of determining unit costs (of a good, service, or semifinished product), calculating the production costs of a good, and determining sales prices. A distinction can be made between preliminary costing in the planning phase and final costing after all production or trading and sales transactions have been completed. The variances from preliminary and final costing should be interpreted and fed back into cost controlling and pricing in a feedback loop.

## Capacity Requirements (= Resource Requirement)

Capacity or resource requirements are the personnel and resources required to process the [work packages](#) of a [project](#), calculated from the estimated effort and time required for the network.

## Capacity Planning

Capacity planning is the quantitative allocation of the executing capacities to each individual [work package](#) necessary for the [project](#), taking into account the [estimation of effort](#). In Projectile the capacities are determined as weighted quotient of the planned working time and the planned project

time in a constant time interval. If desired, the system also takes into account the probability that the planned project will become an order and weights these planned project times accordingly.

## Key Figures

Key figures are consolidated values that can be calculated from document data or other key figures using algorithms and that describe a document. Each key figure is assigned an ID for unique identification. Projectile supports key figures for the masks [contact](#), [project](#), [work package](#) and [employee](#). The use of key figures in Projectile allows the user to create total values, values at any time and values for any period. The values created by a key figure are given a creation date so that they can be kept and reused without having to be recalculated. In addition, each key figure can be assigned to a document, which can be used to integrate key figures into screen views and reports.

## Cost Determination

In Projectile, the cost determination, i.e. the determination of internal labour costs for a project, is represented in two stages. The highest priority in cost determination is given to the internal allocation rates of employees (see [employee](#)). These costs represent the true labor costs. If an employee does not have this allocation rate, the general internal activity rate of the company (see [activity](#)) is used for the cost determination for oncharging.

## Cost Center

A cost center is a part of an organization, delimited according to spatial, functional or allocation aspects, in which costs are incurred (causation principle). The cost center's task is to collect the costs incurred in the defined area and thus enable the person responsible to control costs. Furthermore, in the full cost accounting procedures, the cost center is a prerequisite for creating allocation rates, which are required for the allocation of overhead costs in cost object controlling.

## Cost Unit

A cost object is a reference object to which costs are assigned in business cost accounting. A distinction is made between overhead cost objects and sales-oriented cost objects. Overhead cost objects are cost objects that collect the costs of internal activities or projects without, however, leading to the sale of these activities on the market and thus to revenues that affect sales. The sales-oriented cost objects are cost objects to which both the activity-related costs and the revenues from sales are assigned. In this case, the cost object is also a revenue object.

## Critical Path

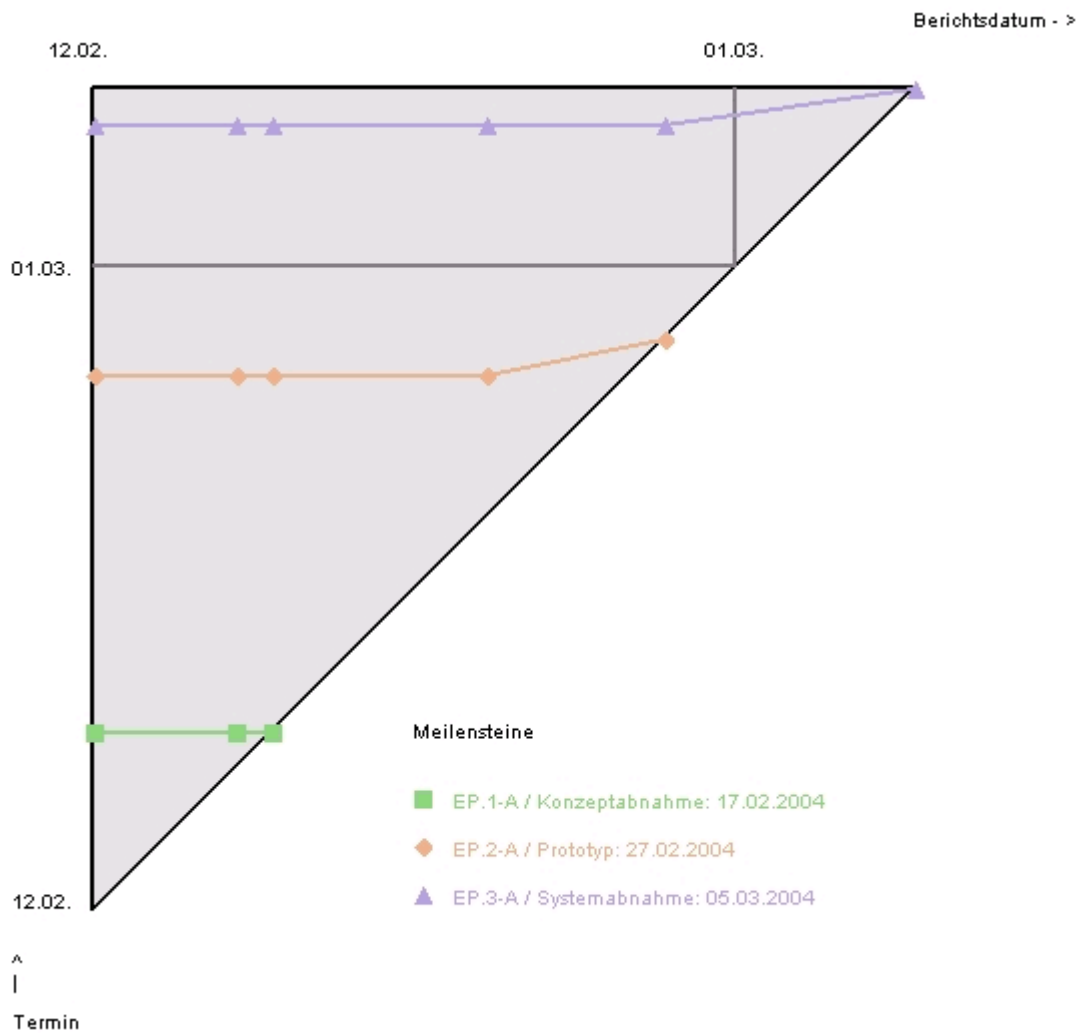
The critical path identifies the path by a [network](#) on which the floats are zero, that is, every missed deadline for activities or events on the critical path directly affects the project finish date. All [work packages](#) in a network that cannot be shifted in time without causing a shift in the project end date are on the critical path.

## Milestone

A milestone is a significant control event in the [project plan](#), defined by a deadline and results, which must be available by this deadline in the quality agreed upon in the project order. Typical milestones are typically critical intermediate results, acceptances, production starts, etc. In Projectile the milestones are defined in the document type [milestone](#) and the trend dates for the [milestone trend analysis](#) are managed in the document type [trend date](#).

## Meilenstein-Trend-Analyse

The milestone trend analysis is a future-oriented instrument for the schedule control of a [project](#): At regular reporting dates, the [scheduling](#) of the project is re-estimated by querying trend data of the expected milestone achievement. A trend about the project's adherence to schedules can be derived from the curve. The trend dates for the milestones can be managed in the document type [trend date](#) and the analysis is visualized in the [project evaluation](#).



## Multi-Project-Management (=Program Management)

Multi-project management is the simultaneous planning, comprehensive control and monitoring of several (interdependent) projects. Entire project portfolios are considered here. Multi-project management is located in the area of conflict between operative and strategic decisions. At the strategic level, it is important to put together the project portfolio “correctly” and set the “right” priorities, and at the operational level, it is important to handle the individual projects economically, resolve resource conflicts and solve time-related bottlenecks.

## Successor

The successor is a component of [relation ship](#) and describes the relationships of processes within a process chain. Due to the logic of processing steps for manufacturing a product or service, certain processes may only be executed after one or more other processes have been completed. In network technology in project planning, the successor is an activity that follows another activity.



## Network Map

The network is a structural model for analyzing and displaying the logical and temporal flow conditions of a [project](#). A network represents the activities and relationships and is an essential instrument for project control; especially for [scheduling](#) and monitoring.

## Network Planning Technique

The network planning technique is an instrument for planning, controlling and monitoring [projects](#). Basically, [project structure plan](#) and [scheduling](#) are required for this; ideally, cost planning and [capacity planning](#) are also included. Two methods of network planning are commonly used in practice: the Critical Path Method (CPM) and the Metra Potential Method (MPM). In CPM, the activities are displayed as arrows and the nodes represent events. In many cases, so-called sham operations are required. In MPM, the operations are displayed as nodes and the arrows show the dependencies of the nodes on each other.

## Organizational Unit

An organizational unit is an element of the organizational plan, which is usually visualized in the organizational chart. Examples of organizational units are subsidiaries, branches, divisions or departments. In Projectile organizational units are visualized with the help of the mask [unit](#).

## Phase

A phase designates a temporal or logical structure section of a [project](#). At least each phase end is also a [milestone](#), i.e. prescribed phase results are available. The division of projects into specific phases is called phase model.

## Portfolio (=Project Portfolio)

In business administration, a portfolio is understood to be a compilation of investments. The construction of a portfolio is usually preceded by an extensive analysis. Owning a portfolio is usually part of a strategy to reduce the risks of financial investments through diversification. The portfolio of a company describes the business areas, the product portfolio is the further refinement of the company portfolio down to the individual product, and the project portfolio is the quantity or subset of all ongoing projects of an organization.

## Portfolio Management (=Project Portfolio Management)

Portfolio management refers to the management of a portfolio, i.e. an inventory of investments. The

portfolio management process includes portfolio planning (selection and analysis), portfolio realization (monitoring and auditing) and portfolio control (performance measurement, attribution). With regard to projects, the focus is on questions regarding the alignment of project goals with corporate strategy, project evaluation and the earnings prospects of projects. Portfolio management methods include the compilation, structuring and determination of key figures for portfolios, the evaluation and prioritization of investments and the simulation of possible portfolios.

## Pricing

### Hierarchy for external pricing:

	Document	Field
1	Work Package	External Hourly Rate
2	Project	External Hourly Rate
3	Top Project	External Hourly Rate (recursively up the project hierarchy)
4	Contact	External Hourly Rate
5	Project Type Activity	External Hourly Rate (recursively up the project hierarchy)
6	Customer-Specific Activity	External Hourly Rate
7	Project-Related Employee Rate	External Hourly Rate (recursively up the project hierarchy)
8	Customer-Related Employee Rate	External Hourly Rate
9	Activity	External Hourly Rate

### Use of external hourly rates in the employee or employee contract:

If external hourly rates per employee or employee contract are used, you must set the **Flag “External hourly rate employee “** in the **Projectile Default**.

If it is set and the fields external hourly rate or external hourly rates in the employee or employee contract are filled, then this has the highest priority.

If the employee records are to be considered last, the flag “external employee records with last priority” must be activated in the Projectile Default.

	Document	Field
1	Employee	External Hourly Rates (record with date in employee)
2	Employee Contract	External Hourly Rate (record with date in the employee contract)
3	Work Package	External Hourly Rate (record with date in work package)
4	Work Package	External Hourly Rate
5	Project	External Hourly Rates (date-related record in the project)
6	Employee	External Hourly Rate

If no date-related record can be determined, the hierarchy mentioned first applies.

## Profit

Profit is the added value realised on the market, expressed in money or percent, which is the goal of

the market-based production process. Colloquially, profit is used as a synonym for profit. In Projectile the profit of a project is determined as the difference between sales and costs, i.e.  $\text{profit [EUR]} = \text{sales [EUR]} - \text{costs [EUR]}$ . The percentage profit is determined as the quotient of absolute profit by sales:  $\text{Profit [\%]} = (\text{Profit [EUR]} / \text{Sales [EUR]}) * 100$ .

## Project

A project is a project that is essentially characterised by the uniqueness of the conditions in its entirety and meets the following criteria:

- uniqueness, no routine activity
- clear target
- time, financial, personnel or other limitations
- high complexity (indicators: effort, number of departments involved, risk)

The projects in Projectile are managed in the document type [project](#).

## Project Controlling

Project controlling is a method for early detection of project deviations by comparing planned and actual results. The project report or an evaluation of the [project manager](#) is used to assess the deviations. The procedure for project controlling must already be defined in the project order. In Projectile, evaluations for controlling (target/actual comparisons for projects, work packages and times) are generated in [project evaluation](#).

## Project Documentation

The project documentation is (according to DIN 69901) the compilation of selected, essential data about configuration, organisation, use of resources, solutions, procedure and achieved goals of the project. A project documentation consists at least of project reports, final project reports and functional specifications.

## Project Coordination

Project coordination is the central form of project framework organization. For the duration of a project, the existing line organization is extended by the staff function of a project coordinator. As a rule, however, it does not have any decision-making or instructional authority over the line functions.

## Project Manager

A project manager is the person responsible for achieving the [project order](#) defined in the [project goals](#). He is the central contact person for the [customer](#). The tasks, authority and responsibility of the

project manager should be defined company-wide. In Projectile, the project manager (and his deputy if applicable) is defined in the document type [Projekt](#).

## Project Management

Project management is a concept that serves to handle projects in a goal-oriented and efficient manner. This includes organizational, methodological and interpersonal aspects (see also [section 1](#)).

## Project Team Members

In principle, project members are all persons involved in a project, even if they do not belong directly to the [project team](#). The project members in Projectile are managed in the document type [employee](#).

## Project Plan

The project plan consists of various sub-plans for the execution of a [project](#) is created by the [project manager](#) or [project team](#). This plan includes [organisation plan](#), [scheduling](#), budget plan, personnel plan, activity plan, implementation plan, risk plan and quality plan. Depending on the type of project, specific plans can be added, such as migration or test plan.

## Project Planning

Project planning includes all activities that lead to a [project plan](#). A project plan can consist of the following elements:

- [work breakdown structure](#) with work package descriptions
- Schedule (network, bar chart, milestone plan)
- Resource plan
- Cost plan
- Risk analysis

## Project Risk (= Risk)

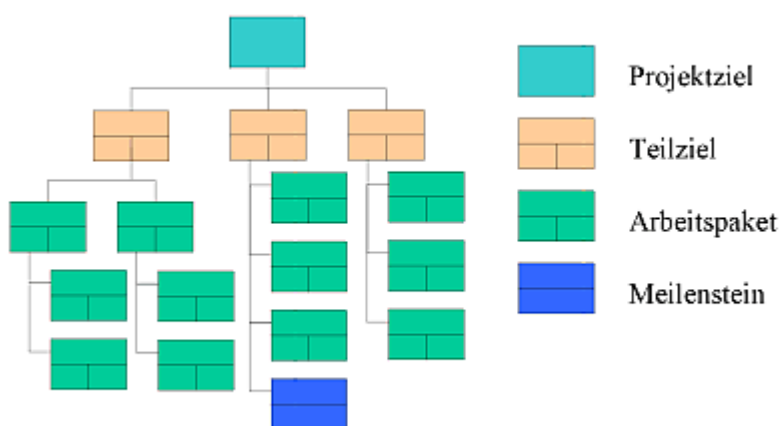
A risk is the calculated forecast of a possible damage or loss in the negative case or a possible benefit or profit in the positive case (opportunity). What is perceived as damage or benefit depends on values. A risk is the probability of the occurrence of a negative event (mathematical) or the probability of the occurrence of a negative event multiplied by the financial extent (business administration). A project risk can be qualified in terms of its probability of occurrence, its effects (delay, cost increase, loss of quality) and the damage it causes.

# Project Structuring

Project structuring is the development of a work breakdown structure. A project is divided hierarchically into smaller and smaller elements from [project](#), through the sub-projects to the [work packages](#). The lowest level of structuring is the basis for the further [project planning](#).

## Work Breakdown Structure

A work breakdown structure (WBS) is the division of a project into work-related parts, such as phases, work orders, and work steps.



In Projectile, work breakdown structures are generated in the [project evaluation](#).

## Project Team

The project team consists of the [project staff](#) who, together with the [project leader](#), are responsible for project implementation. The project team is defined in the [project](#) document type for each parent project.

## Project Goal

The project goal is part of [project order](#) and consists of three components

- Content
- Time
- Costs

It must be accessible, complete, consistent, testable, documented and agreed between [client](#) and [project management](#).

## Buffer Time

The buffer time is a term from the network planning technique. The buffer time is a time frame for the execution of an activity. This leeway can be used by shifting the activity and/or by extending the activity duration. You can determine four types of float time in a network by entering several specifications. The total float and the free float are the most commonly used. The total float  $G_{Pi}$  of activity  $i$  is calculated from the difference between  $SA_{Zi}$  (latest start time of  $i$ ) and  $FA_{Zi}$  (earliest start time of  $i$ ), or  $SE_{Zi}$  (latest finish time of  $i$ ) and  $FE_{Zi}$  (earliest finish time of  $i$ ). This means that the total float indicates by how much the activity can be shifted without jeopardizing the end of the project:  $G_{Pi} = SA_{Zi} - FA_{Zi} = SE_{Zi} - FE_{Zi}$ . The Free Buffer is the time that does not endanger the earliest possible start or end of the successor. (Formally: all successor operations can be performed in their earliest position). It can only occur if at least two completed operations meet the same successor. It is calculated for a "normal sequence" (end - start) by forming the difference between the earliest end of the activity in question and the earliest start of its successor. In the case of a start sequence (start - start) the earliest start dates of the operations are compared and in the case of a finish sequence (finish - finish) the earliest finish dates of the operations are compared. Beyond that.

## Invoicing (= Settlement of Expenses)

In the case of invoicing, goods or services provided by the supplier are remunerated by the buyer according to agreement. Remuneration can be based on expenses or fixed prices and is usually controlled by payment plans. In the case of an effort-based remuneration, the customer often requests a detailed list of all expenses or costs incurred when issuing the invoice. DIN 69903 interprets invoicing as the entire process from cost recording, allocation and invoicing to the recognition of the invoice. In Projectile this functionality is represented by the [invoicing module](#).

## Resources

Resources are personnel and material resources that are required for the execution of activities, work packages or projects (DIN 69902). The unit of measurement for resources can be either a unit of value (Euro, US Dollar...) or a unit of quantity (working hours, machine running times, tons of building material, etc.). You assign resources to a project by specifying times and periods when they are available to the project.

## Resource Management

The disposition of personnel, material resources and other aids required for project work is the task of resource management. The aim of resource management is to ensure that resources are used optimally and that projects are supplied with these resources as fairly as possible. The operating times for resources must be kept as short as possible, since they burden the project budget with the corresponding costs. From the point of view of the organization, the aim is to achieve the most even and high utilization of resources.

## Backward Calculation (= Backward Scheduling)

Within the network planning technique, forward and backward calculations are required to determine the total project duration, earliest and latest dates and buffer times. Backward calculation is the method of planning a project from its scheduled end. In scheduling, a deadline is specified by which the project result must be completed. Scheduling is then carried out from the end date backwards to the latest possible start date of the project.

## SPI

The SPI (Schedule Performance Index) is the time-related performance indicator used in earned value analysis. It is formed from the ratio of earned value and plan expenses. This means that if the SPI is greater than 1.00 (100%), the project results have been achieved faster than originally planned, whereas if the SPI is less than 1.00 (100%), the project is progressing too slowly.

## Subproject

In practice, larger projects are broken down into sub-projects according to certain criteria (functional, organisational, technical, etc.) in order to be better managed and administered. When subprojects are divided up over time, they are often referred to as project phases.

## Scheduling

Scheduling includes the planning of the start and end times of all [work packages](#) of a [project](#).

## TopDown Planning

Top-down planning refers to project planning according to the top-down principle. Here, activities, processes, times, and costs are planned in detail at project level, and this planning results in restrictions for the lower levels (subprojects and work packages).

## TopDown Principle

In [project management](#), the top-down principle refers to the general procedure for processing or planning from the superordinate projects to the individual [work packages](#) (i.e. from top to bottom: overall project - subprojects - work package).

## Process

The work packages that are defined in work breakdown structure planning are activities (in the sense of network planning). The activities are then linked to each other by relationships. Depending on the network type, activities are symbolized by arrows or nodes. During project planning, activities are formed from the work packages.

## Predecessor

The predecessor is a component of the [relationship](#) and describes the relationships between processes within a process chain. Due to the logic of processing steps for the production of a product or service, certain operations may only be executed after one or more other operations have been completed. In network technology in project planning, the predecessor is an activity that precedes another activity.

## Forward Calculation (= Forward Scheduling)

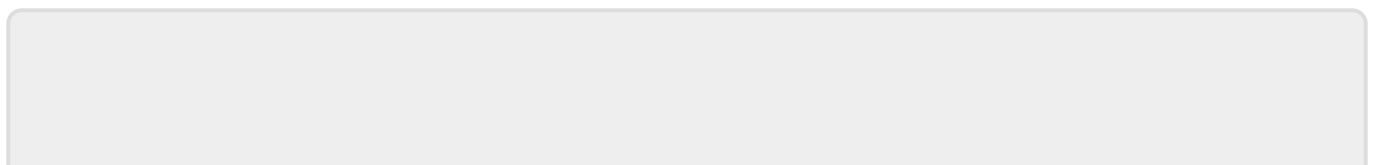
Within the network planning technique, forward and backward calculations are required to determine the total project duration, earliest and latest dates and buffer times. Forward calculation determines the end time starting from the start of the project. In accordance with the relationships, all activities and events are entered one after the other from the start of the process with their respective durations, time intervals, floats, and so on, in the appropriate calendar.

## Knowledge Management

Knowledge management describes a direction of management theory that aims to use and develop knowledge in organizations in order to achieve the company goals in the best possible way. Contributions to knowledge management are developed in many disciplines, especially in business informatics, business administration, computer science, social science or information science.

## Payment Plan

A payment plan denotes a sequence of invoices where the total price is paid in a series of instalments according to the previously agreed dependency of delivery and instalments.





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