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3.2 Project data and Project planning

In the project-planning module, project ideas can be administered and projects can be planned. The project ideas have to be authorised and can be turned into projects after clearance.

In the project desktop, all project-orientated data (project structure, milestones and allocative relations) and project-orientated trend estimations (status, deadlines) are administered.

The screenshot shows the 'Projekt MSP Projectile 3.0' desktop. The navigation bar includes tabs for Stammblatt, Beteiligte, Portfolio, Zeiten, Budget, Finanzen, Bestellung, Sonstiges, and Alle. The main content area is divided into several sections:

- Projektinfo:** Nummer: MSP, Status: aktiv
- Bezeichnung:** Projectile 3.0
- Projektzeitraum:** von 01.03.2006 bis 11.09.2006
- Oberprojekt:** (empty)
- Unterprojekte:** 1 - 4 / 4

<input type="checkbox"/>	Nummer	Bezeichnung	Status
<input type="checkbox"/>	MSP.1	Umfang	abgeschlossen
<input type="checkbox"/>	MSP.2	Analyse/Softwareanforderungen	abgeschlossen
<input type="checkbox"/>	MSP.3	Entwurf	abgeschlossen
<input type="checkbox"/>	MSP.4	Entwicklung	aktiv
- Vorgänge:** 1 - 1 / 1

<input type="checkbox"/>	Vorgangsnummer	Bezeichnung
<input type="checkbox"/>	MSP-1	Projektleitung
- Meilensteine:** 1 - 1 / 1

<input type="checkbox"/>	Nummer	Bezeichnung	Datum
<input type="checkbox"/>	MSP-A	Abnahme Gesamtsystem	01.03.2006
- Fertigstellung:** 1 - 2 / 2

<input type="checkbox"/>	Nummer	Fertigstellung
<input type="checkbox"/>	MSP-A	50,00
<input type="checkbox"/>	MSP-B	75,00

Illustration 6: Project desktop

Through using the project templates, even very complex project structures can be defined within a few minutes. Furthermore, the system supports you with planning assistants based on the net planning technique.

Every project within the system can be comprised of as many sub-projects and hierarchy levels as

desired. There is no limit, the highest amount of flexibility in the scope of the project definition is thus guaranteed. The system allows for a diversification of the project structure, in the case of contract diversification, for example. There is the possibility of administering both internal and external projects.

The definition of the lowest levels in the project hierarchy follows in the jobs. On defining the jobs, priorities and deadlines can be stipulated. Critical trend dates can thus be monitored more effectively.

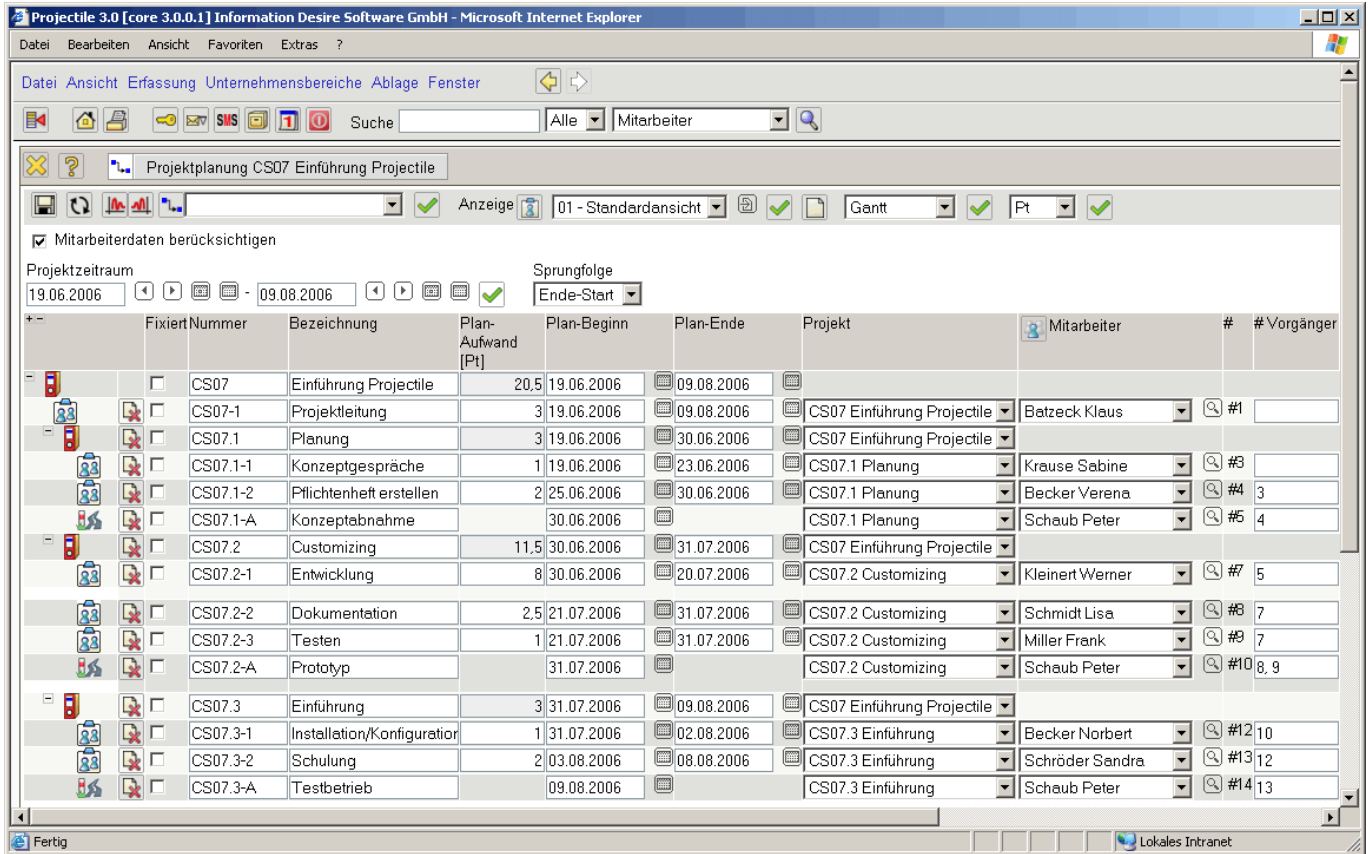


Illustration 7: Project planning assisted by the net plan technique

All project times are stored in jobs, which are allocated to the appropriate project or sub-project. An essential advantage of this procedure is to be found in the improved quality of the assessments. This way, the person responsible for the project obtains detailed controlling overviews down to the levels of employees and tasks. Furthermore, due to the allocation of a task to exactly one employee, quicker and simpler time tracking becomes possible, which, on the other hand, is an advantage for getting user approval.

In the scope of BottomUp-Planung, all defined plan values on job levels are passed up to the project level. In combination with the defined price model, the internal and external costs (budget from the project work) are shown.

With the aid of allocated skills and the alignment of employee qualifications and free employee capacities, the system makes suggestions about the composition of the project team where desired.

Fixiert	Nummer	Bezeichnung	Plan-Aufwand [Pt]	Plan-Beginn	Plan-Ende	Projekt	Mitarbeiter
<input type="checkbox"/>	CS07	Einführung Projectile	21,5	19.06.2006	09.08.2006		
<input type="checkbox"/>	CS07-1	Projektleitung	3	19.06.2006	09.08.2006	CS07 Einführung Projectile	Batzeck Klaus 7.9% 3.9% (100.0%)

Illustration 8: Resource management based on skill management

Distinctive partial targets in the process of the project are defined in the milestone desktop. Estimating the deadline with regard to reaching a milestone can be performed in the deadline form. As a result of this, the person responsible for the project is given a reliable early warning system in the scope of milestone trend analysis: delays in time within the process of the project can thus be recognised at an early stage. The e-mail notification system reminds you before reaching important milestone dates, if desired.

Projectile automatically determines the working budget from the entered data of the job definition. In the scope of budget planning (see illustration 9), all other budget posts are planned in the next step; for example, travelling, material and foreign cost budgets.

After the definition of a project, you obtain the possibility in the invoicing module to make up offers from the plan data of the project structure and the data from the budget management. The offers are calculated for the specific customer from the defined project data (estimation of effort and budgets). The individual offer positions can be modified as you wish. After being drawn up, the offers can be printed out (see illustration 10).

Projekt CS07 Einführung Projectile									
Dokument Bearbeiten Ansicht Aktionen									
Stamblatt		Beteiligte	Portfolio	Zeiten	Budget	Finanzen	Bestellung	Sonstiges	Alle
Primärer Aufwand		Umsatz	Kosten		Profit	Profit			
		16.760,00 EUR	8.044,00 EUR		8.716,00 EUR	52 %			
Primäraufwand intern		15.960,00 EUR	7.604,00 EUR		8.356,00 EUR	52,36 %			
Primäraufwand extern		800,00 EUR	440,00 EUR		360,00 EUR	45 %			
Budget									
1-2 / 2									
Bezeichnung	Kostenart	Internes Budget	Externes Budget	Budgetdifferenz	Anzahl	Fremdleistung			
1 Reisekosten	Reisekosten	2.000,00	2.000,00	0,00	✓	✓			
2 Externer Berater	Fremdleistungen	3.400,00	4.000,00	600,00	✓	✓			
Σ		5.400,00	6.000,00	600,00					
Projekt (Primäraufwand + Sekundäraufwand)		Umsatz	Kosten		Profit	Profit			
		22.760,00 EUR	13.444,00 EUR		9.316,00 EUR	40,93 %			
Zuschlag Festpreis		Prozentual	Absolut						
		%	0,00 EUR						
Zuschlag Risiko		3 %	682,80 EUR						
Verhandlungszuschlag (optional)		3 %	682,80 EUR						
Projekt (Projekt + Zuschläge)		Umsatz	Profit		Profit				
		24.125,60 EUR	10.681,60 EUR		44,27 %				
Fakturadaten		Angebotswert	Rechnungsbetrag						
		24.220,00 EUR	0,00 EUR						

Illustration 9: Budgeting/calculation

Angebot CS-06-06-6

Stammblatt | Sonstiges | Alle

Angebot: 7

Bezeichnung: CS-06-06-6

Projekt: CS07 Einführung Projectile

Status: Angebot übernommen

Netto: 24.220,00 EUR

Umsatzsteuer: MwSt-D-Voll

Brutto: 28.095,20 EUR

Mitarbeiter: Schaub Peter

Angebotsdatum: 26.06.2006

Gültig bis: 10.07.2006

Original-Angebot

Angebotspositionen

Position	Bezeichnung	Anzahl
1	7-1	Arbeitspaket CS07-1 Projektleitung 24,00 h
2	7-2	Arbeitspaket CS07.1-1 Konzeptgespräche 8,00 h
3	7-3	Arbeitspaket CS07.1-1 Konzeptgespräche 8,00 h
4	7-4	Arbeitspaket CS07.1-2 Pflichtenheft erstellen 16,00 h
5	7-5	Arbeitspaket CS07.2-1 Entwicklung 76,00 h
6	7-6	Arbeitspaket CS07.2-2 Dokumentation 24,00 h
7	7-7	Arbeitspaket CS07.2-3 Testen 8,00 h
8	7-8	Arbeitspaket CS07.3-1 Installation/Konfigurati 8,00 h
9	7-9	Arbeitspaket CS07.3-2 Schulung 16,00 h
10	7-10	Budget CS07-1 Reisekosten 1:00 h

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CONSULT GmbH
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Bahnhofstraße 12
55120 Mainz

Datum: 26.06.2006
Kundennr.: 410
Bearbeiter: Peter Schaub
Telefon: - 11
Lieferantennr.: 230090

Angebot CS-06-06-6

Projekt: Einführung Projectile

Zu diesem Angebot gehören zwei Seiten Anlage.

Hiermit bieten wir Ihnen die folgenden Leistungen an:

Pos.	Bezeichnung	Menge	Preis	Summe
01	CS07-1 Projektleitung	24,00	125,00 €	3.000,00 €
02	CS07.1-1 Konzeptgespräche	16,00	100,00 €	1.600,00 €
03	CS07.1-2 Pflichtenheft erstellen	16,00	100,00 €	1.600,00 €
04	CS07.2-1 Entwicklung	76,00	95,00 €	7.220,00 €
05	CS07.2-2 Dokumentation	24,00	80,00 €	1.920,00 €
06	CS07.2-3 Testen	8,00	80,00 €	640,00 €
07	CS07.3-1 Installation/Konfiguration	8,00	80,00 €	640,00 €
08	CS07.3-2 Schulung	16,00	100,00 €	1.600,00 €
09	Budget CS07-1 Reisekosten	1,00	2.000,00 €	2.000,00 €
10	Budget CS07-2 Externer Berater	1,00	4.000,00 €	4.000,00 €
			Gesamt Netto	24.220,00 €
			MwSt.: 16%	3.875,20 €
			Gesamt Brutto	28.095,20 €

Illustration 10: Offer management

The order form administers the customer's orders. After accepting an offer, the ordering data can either be entered directly into the project or a confirmation of order is drawn up. This confirmation of order is necessary for projects that are ordered differently than they were offered.

The screenshot displays a software interface for contract management. It is divided into three main sections:

- Left Sidebar (Contract Details):** Contains fields for 'Auftragsbestätigung' (5), 'Bezeichnung' (2006-0030), 'Projekt' (CS07 Einführung Projectile), 'Status' (Auftragsbestätigung übernommen), 'Netto' (22.220,00 EUR), 'Umsatzsteuer' (MwSt-D-Voll), 'Brutto' (25.775,20 EUR), 'Mitarbeiter' (Schaub Peter), 'Datum' (26.06.2006), 'Bestellnummer' (547800), 'Bestelldatum' (26.06.2006), and 'Original-Angebot' (CS-06-06-6).
- Top Right Window (Order Form):** Titled 'Projekt CS07 Einführung Projectile', it has tabs for 'Stammblatt', 'Beteiligte', 'Portfolio', 'Zeiten', 'Budget', 'Finanzen', 'Bestellung' (highlighted), 'Sonstiges', and 'Alle'. Fields include 'Rabatt' (input), 'Bestellwert' (22.220,00 EUR), 'Bestellnummer' (547800), 'Bestelldatum' (26.06.2006), 'RK-Abrechnungsart' (nach Aufwand), and 'RK-Pauschalpreis' (input).
- Bottom Section (Table):** Titled 'Auftragsbestätigungs-Positionen', it shows a table with 10 rows. Each row includes a checkbox, a position number, a description, and various numerical values.

	Position	Bezeichnung	Anzahl	Externer Betrag	Interner Betrag
1	5-1	Arbeitspaket CS07-1 Projektleitung	24,00 h	3.000,00 Pt	1.344,00
2	5-2	Arbeitspaket CS07.1-1 Konzeptgespräche	8,00 h	800,00 Pt	440,00
3	5-3	Arbeitspaket CS07.1-1 Konzeptgespräche	8,00 h	800,00 Pt	440,00
4	5-4	Arbeitspaket CS07.1-2 Pflichtenheft erstellen	16,00 h	1.600,00 Pt	800,00
5	5-5	Arbeitspaket CS07.2-1 Entwicklung	76,00 h	7.220,00 Pt	2.880,00
6	5-6	Arbeitspaket CS07.2-2 Dokumentation	24,00 h	1.920,00 Pt	1.100,00
7	5-7	Arbeitspaket CS07.2-3 Testen	8,00 h	640,00 Pt	240,00
8	5-8	Arbeitspaket CS07.3-1 Installation/Konfigurat	8,00 h	640,00 Pt	240,00
9	5-9	Arbeitspaket CS07.3-2 Schulung	16,00 h	1.600,00 Pt	560,00
10	5-11	Budget CS07-2 Externer Berater	1,00 h	4.000,00 Pt	3.400,00

Illustration 11: Contract management

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