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.

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.
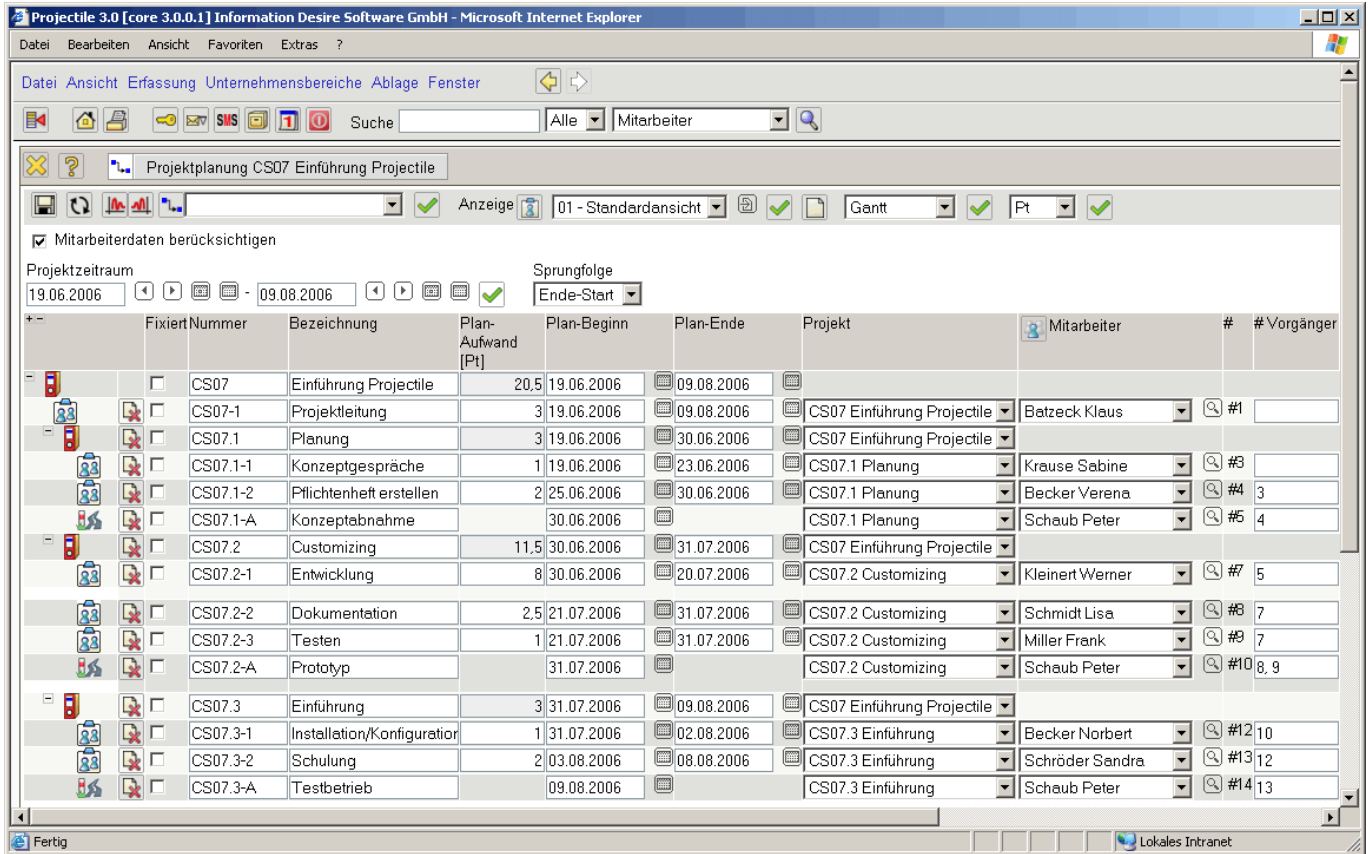

Illustration 7: Project planning assisted by the net plan technique

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.

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).

Illustration 9: Budgeting/calculation

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.

Illustration 11: Contract management