

Projectile Version 6

The integrated total solution for service providers: projects, processes, knowledge.

Help, Part 4: Project Planning

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4.1 Project Definition and Project Planning

The **project definition** is the first project phase and forms the basis of a project. In this phase the binding specifications for the subsequent project planning are made. A careful project definition is a decisive prerequisite for the successful implementation of a project.

Project planning is one of the main tasks of project management. Project planning is usually the second of the four project phases, i.e. it follows the project definition and prepares the actual project execution as well as possible.

Project planning begins with **project structure planning**. The resulting structures form the basis for goal-oriented development; all further planning steps are based on them. The task packages are derived from the work breakdown structure, for which an estimate of the effort required is then made.

With the results of the effort estimation, a schedule is now created for the individual work packages or subtasks, in which the work packages are set up in the order in which they are to be worked out. After this list has been drawn up, a schedule is drawn up.

The subsequent **resource planning** should ensure an optimal use of the available personnel and the available operating and material resources. The comparison of resources with other projects should be included in these considerations in the form of multi-project planning.

Finally, cost planning is carried out on the basis of the planning data.

Projectile offers various options for creating projects in order to map the project definition and planning in the system: Creation from a sales funnel (for external projects) or from a project idea/project proposal (for internal and external projects), the manual creation of a project, the project templates, the project construction kit and the import from MS Project

4.2 Project Creation from Sales Tunnel

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Basic	Data	Application]
From		22.03.2020		To 25.08.2021	•				
Unit		Support		♥					
Project		•	First name	Name +	Work phone	Mobile number	Email Address		
managers		1	Hannah	Dohle	-24		hannah.dohle@		
- E Attribu	ıtes								
Priority	3 - norm	mal priority		\bigtriangledown					
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Product	Projecti	ile Version 3	.2	∇					
Strategy	2 - med	dium		∇					

Sales funnels in Projectile (see also section 2.6) represent project opportunities and can be the basis for project investment. A project can be created from the sales funnel using the action "create project".

Thereby the key data of the sales funnel (especially the information of the tab "project creation") are transferred to the mask "project".

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Contents description																
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projects													00:00	00:00	00:00)
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Continue with the manual project creation in section 4.4.

4.3 Project Creation from Project Proposal

Project proposals (project ideas) are often used in project management as a preliminary stage of a project before a project is initiated. In Projectile, project proposals can be created and managed in the project management menu:

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Human resources										
4 🗐 Project management	E General data									
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Portfolios 💿	Contract									
Programs 📀	Content									
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C Resource Planning	Note					terrar and the second				
🚴 Revenue Forecasts										
3 Jobs										
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# Estimations	Billing type 🗢	Category		♥	Product			\bigtriangledown		
🖻 💼 Chart	Strategy	Class		∇						
Queries										
Purchasing and procurement										
Offer and order										
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D 💽 Billing										
Dicket management										
Risk management										

In the following example, the extension of the billing module is defined as a project proposal. The subsequent internal project is to be carried out from 06.01.2020 to 28.02.2020. The status of the request is "open". Further information on the request should support the decision making process (various attributes, planned effort, planned costs, planned turnover, added value, risks/ opportunities, ...).

t idea 2			-□ ☆ 三
Document - Edit - View -	Actions +		
Participants Details			
data			
2		Status <mark>0 -open</mark> 😒	
Extension Billing Module "Con	tract Manager	ient"	
nning 04.06.2019 © 🛄		End of planning 25.06.2020	
15			
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After saving the application, the external and internal participants (unit, cost centre, project manager, project team, steering committee and project partners) can be entered in the "Participants" tab...

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 External partic External project Alternative end customer 	ipant	ar	Company M	1T Maier Measuring Te	chnolog) 🗢				
Internal partici	pant	5							
Unit				♥ Co	ost		\bigtriangledown		
				cent	ter				
Project managers			First name	Name 🛎	Work phone	Mobile number	Email Address		
		1	Klaus	Müller	-29		klaus.mueller@t		
Project team			First name	Name 🔺	Work phone	Mobile number	Email Address		
		1	Gabi	Maier					
		2	Olivia	Raber	-22		olivia.raber@tes		
		3	Paula	Schmidt	-34		paula.schmidt@		
		4	Barbara	Wollert	-30		barbara.wollert		
Project board			First name	Name 🛎	Work phone	Mobile number	Email Address		
		1	Hans	Eilers	-25		hans.eilers@tes		
Project partners		. ش	Company	Contact person 1	Contact2	Employee	SalesRole	Note	
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... and in the tab "Details" further characteristics (planned expenditure, planned costs, planned turnover, project goal, alternatives, ...).

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General data Pa	orticipants Details	
Quantitative ch	naracteristics	
Planned workload	200:00 25,000 Pd	
Planned expenses	16.500,00 EUR	
Planned turnover	EUR	
Qualitative cha Project purpose	aracteristics Expansion of the Billing Module.	
Alternatives	Purchase.	
Feasibility	Yes.	
Cost/benefit ratio		
Business case		
Requirements		

A project can be created from the (possibly approved) project proposal using the action "Create Project".

🗙 🛄 Project idea	2			☆☆目
🖹 🔒 🛓 🗐	Document - Edit - View - Actions -			
General data P	articipants Details			
- 🖻 General data				
Number	2	Status 1 - a	accepted 🗢	
Description	Extension Billing Module "Contract Management"			
Content				
Start of planning	04.06.2019	End of planning 25.0	6.2020 ©	
Note				

The key figures of the project application are transferred to the "project" mask.

Project 83		
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- Basic information		
Number	082	Status Passive
Description	Extension Billing Module "Contract Management"	
Contents description		
Start of planning	25.06.2021 •	End of planning 25.06.2020
arear a branning	L	

Continue with the manual project creation in section 4.4.

4.4 Manual Project Creation and Definition

In Projectile, projects can be created manually in the "Project Management" menu ("+-Button"):

44	卆	X Project 83															心众
Administration			D			Document •	- Edit - View -	Back reference	es •								
🙋 Customer relationship manage		General data	Stake	holders	Proposal	Portfolio	Risk assessmen	Status	Key figures	Calculat	tion Billin	a documents	Order da	ata Logbo	ok Final Re	nort Misc	
B Human resources		General Gata	June	nondera	rioposai	FOILIOND		Jucus	Key nyures	curcula	uon binni	g aocumento	order di	ata cogoo	on rinarree	Port	
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Portfolio and Program		Number		082					Status P	assive							
Projects		Description															
Active main projects	۲																
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MS project import		Note															
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Resource Planning		Main project					Parent										
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99 Offer and order																	
1 Tracking																	
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4.5 Project Definition

In the following example the project "082 - Development of a new user interface" is created and saved. Afterwards, the required data for the project definition is entered.

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General data	Stakeholders	Proposal	Portfolio	Risk assessment	Status	Key figures	Calculation	Billing documents	Order data	Logbook	Final Report	Misc		
- Basic inform	nation													
Number	082					Status	Passive							
Description	Develop	ment of a new	v user interfac	e										
Contents	new use	r interface for	Projectile inc	uding enhancements	in the das	hboard builder								1
Start of planning	g 19.03.20	20 🛛 🗖				End of planning	05.09.2021	•						
Note														

Click on the tab "Stakeholders" in the frame "ext. Involved" tab in the "Ext. participants" frame, a distinction is first made as to whether the project is internal or external. In the case of external projects, the client (field "Company") and the contact persons for the project are then entered. In the frame "internal participants" the unit can be assigned (organizational unit, the head of the unit then also has access to the project), the project manager(s), the project team and other internal participants). The project team is also automatically assigned on the basis of the resource planning (see Section 4.8).

X Project 082	Developm	ent of	a new use	r interface											☆☆目
	10 P	0 0			Document	• Edit •	View +	Back references	• Actions •						
General data S	takeholde	rs P	roposal	Portfolio	Risk asses	isment	Status	Key figures	Calculation	Billing documents	Order data	Logbook	Final Report	Misc	
External stake	eholders	0	Company	CSH Consult	AG										
Commercial conta	act	Sande	er Peter		Þ										
Specialist contact	person	Klane	Iris		∇										
Technical contact	person	Müller	r-Jahn Hei	ke	\bigtriangledown										
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Project		· Firs	st name	Name +	1	Vork phone	Mo	bile number	Email Address						
managers		1 Pet	ter	Schaub		11			peter.schaub@t	-					
Broject team	and size					the design of the second									
Project court		* HD	st name	Name *		vork prione	MO	olle number	Email Address						
Project board		• First	st name	Name *	1	Vork phone	Mo	bile number	Email Address						
Project partners	11 40	• Cor	mpany	Contact	person 1 0	iontact2	Em	iployee	SalesRole	Note					
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In the tab "Proposal" you can (if the project application is not used) enter data for a project application (background, goal, requirements, restrictions, business case, ...)



In the "Portfolio" tab, various attributes for the project (probability, priority, order type, project type, ...) can be stored and the project can be assigned to programs or portfolios.

In some versions the classification of projects and tailoring is also possible.



In the tab "Risk Assessment" a project-related risk assessment can be made.

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eneral data Stakeholders Proposal P	ortfolio Risk assessment	Status	Key figures	Calculation	Billing documents	Order data	Logbook	Final Report	Misc	
= Summary										
Key figure risks 13										
E Customer risks										
Key figure customer risks	4									
Customer has enough knowhow to support the p	roject 1		~							
Result of the project is very important for the cu	stomer 2		~							
Project requires no organisational changes at the	1		~							
customer										
Economic risks										
Ney ingure economics risks	9	_								
Risks are covered by the calculation	1	×								
Project will be offered on a Time & Material basis	3									
Offer is based on General Terms & Conditions	4	-								
Cost estimation is very reliable	1									
* Resource risks										

After the project definition, the next step is project structuring.

4.6 Project Structuring

The work breakdown structure (WBS) is the result of dividing the project into elements that can be planned and controlled. A project is divided into subprojects and work packages as part of the structuring process. Subprojects are elements that must be subdivided further, work packages are elements that are located at the lowest level in the WBS and are not subdivided further there.

The task packages are derived from the work breakdown structure, for which an estimate of the effort required is then made. You can create the WBS using the "Project Planning" function:

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eral data Stak	eholde	rs F	Proposal Portf	olio 🗍 Risk ass	essment Status	Key figures	Calculatio	n 🎽 Billing do	cuments On	ler data 🕺 L	ogbook	Final Repo	rt Misc			
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art of planning ote Structure ain project abordinate ojects	082 0	Develop	oment of a new us	er inter Parent Description	project Status	Begin planning	End p	lanning Proje	ect managers	Target time 00:00	Plan	nning time 00:00	Actual time 00:00	Exter LastStateEstimate	EnterNewState	
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tart of planning obe Structure lain project ubordinate rojects occesses	082 0	Develop @ •	number * Process number *	er inter Parent Description Description	project Status Begin date planning	Begin planning End date planning	End p	lanning Proje Planning time 00:00	tt managers Target time 00:0	Target time 00:04 Actual	Plan 0 1 time 1 00:00	nning time 00:00 IsClc	Actual time 00:00	Exter LastStateEstimate	EnterNewState	

In addition to defining the work breakdown structure, this dialog box also allows you to plan the process and schedule as well as resource planning. It consists of forward and backward calculations, buttons for adding WBS elements, columns for defining WBS elements, and the bar chart:



In the following example, project "049" is first divided into two sub-projects: Planning Phase and Implementation Phase). To do this, first select the project and then click twice on the project icon. Projectile then creates these two subprojects ...

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2 4 062 Development of a ne 0,000 Pd 19.03.2020 0	
19.03.2020 0 1	
19.03.2020 of 2. Select PSP Element (here subproject - twice)	

... and the user then fills in the names of the sub-projects and saves the project plan.

×	Project planning	082 Development of a ne	w user interface							白々田
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	4 🔄 082	Development of a ne	0,000 Pd	0,000 Pd	0,000 Pd	19.03.2020	05.09.2021			
	082.1	Planning Phase				19.03.2020	05.09.2021			
	082.2	Implementation Phase				19.03.2020	05.09.2021		P	

In the next step, two tasks (activities) are added for each subproject. First select the subprojects and then click twice on the task symbol. Projectile then creates the four tasks for the two subprojects ...

Description Development of a ne	0,000 Pd	0,000 Pd	Actual time	Start	End	External hourly rate	Marct April May Jupe July Au	our Septr Octob Nove	Deen Janua Febra Marel Anzil Ma
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082.1-2	0,000 Pd	0,000 Pd	0,000 Pd	19.03.2020	2. Select	PSP Elements (n	ere Processes)		
Implementation Phase	0,000 Pd	0,000 Pd	0,000 Pd	19.03.2020					
082.2-1	0,000 Pd	0,000 Pd	0,000 Pd	19.03.2020	3. Create	PSP Elements			
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	082.1-1 082.1-2 Implementation Phase 082.2-1 082.2-2	082.1-1 0,000 Pd 082.1-2 0,000 Pd Implementation Phase 0,000 Pd 082.2-1 0,000 Pd 082.2-2 0,000 Pd	082.1-1 0,000 Pd 0,000 Pd 082.1-2 0,000 Pd 0,000 Pd Implementation Phase 0,000 Pd 0,000 Pd 082.2-1 0,000 Pd 0,000 Pd 082.2-2 0,000 Pd 0,000 Pd	082.1-1 0,000 Pd 0,000 Pd 0,000 Pd 082.1-2 0,000 Pd 0,000 Pd 0,000 Pd Implementation Phase 0,000 Pd 0,000 Pd 0,000 Pd 082.2-1 0,000 Pd 0,000 Pd 0,000 Pd 082.2-2 0,000 Pd 0,000 Pd 0,000 Pd	082.1-1 0,000 Pd 0,000 Pd 0,000 Pd 19.03.2020 062.1-2 0,000 Pd 0,000 Pd 0,000 Pd 19.03.2020 Implementation Phase 0,000 Pd 0,000 Pd 0,000 Pd 19.03.2020 062.2-1 0,000 Pd 0,000 Pd 0,000 Pd 19.03.2020 062.2-2 0,000 Pd 0,000 Pd 0,000 Pd 19.03.2020	082.1-1 0,000 Pd 0,000 Pd 0,000 Pd 19.03.2020 2. Select 082.1-2 0,000 Pd 0,000 Pd 0,000 Pd 19.03.2020 2. Select Implementation Phase 0,000 Pd 0,000 Pd 0,000 Pd 19.03.2020 3. Create 082.2-1 0,000 Pd 0,000 Pd 0,000 Pd 19.03.2020 3. Create 082.2-2 0,000 Pd 0,000 Pd 0,000 Pd 19.03.2020 0.509.2021	082.1-1 0,000 Pd 0,000 Pd 19.03.2020 2. Select PSP Elements (hr 082.1-2 0,000 Pd 0,000 Pd 19.03.2020 2. Select PSP Elements (hr Implementation Phase 0,000 Pd 0,000 Pd 19.03.2020 3. Create PSP Elements 082.2-1 0,000 Pd 0,000 Pd 19.03.2020 3. Create PSP Elements 082.2-2 0,000 Pd 0,000 Pd 19.03.2020 5.09.2021	082.1-1 0,000 Pd 0,000 Pd 19.03.2020 082.1-2 0,000 Pd 0,000 Pd 19.03.2020 2. Select PSP Elements (here Processes) Implementation Phase 0,000 Pd 0,000 Pd 19.03.2020 3. Create PSP Elements 082.2-1 0,000 Pd 0,000 Pd 19.03.2020 3. Create PSP Elements 082.2-2 0,000 Pd 0,000 Pd 19.03.2020 5.059.2021	082.1-1 0,000 Pd 0,000 Pd 0,000 Pd 19.03.2020 2. Select PSP Elements (here Processes) 062.1-2 0,000 Pd 0,000 Pd 19.03.2020 2. Select PSP Elements (here Processes) 1 Implementation Phase 0,000 Pd 0,000 Pd 19.03.2020 3. Create PSP Elements 1 062.2-1 0,000 Pd 0,000 Pd 0,000 Pd 19.03.2020 3. Create PSP Elements 1 062.2-2 0,000 Pd 0,000 Pd 19.03.2020 3. Create PSP Elements 1

... and the user then fills in the names of the tasks and saves the project plan.

In the example, three more tasks are then created for the second subproject ...

×E	Project planning	082 Development of a new user interfac	e						$\Rightarrow \diamond \equiv$
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	4 082.1	Planning Phase	0,000 Pd	0,000 Pd	0,000 Pd	19.03.2020	05.09.2021		P
	082.1-1	Catalogue of Requirements	0,000 Pd	0,000 Pd	0,000 Pd	19.03.2020	05.09.2021		
	082.1-2	Specification	0,000 Pd	0,000 Pd	0,000 Pd	19.03.2020	05.09.2021		
	4 🗐 082.2	Implementation Phase	0,000 Pd	0,000 Pd	0,000 Pd	19.03.2020	05.09.2021		
	082.2-1	Design	0,000 Pd	0,000 Pd	0,000 Pd	19.03.2020	05.09.2021		
	082.2-2	Mockup	0,000 Pd	0,000 Pd	0,000 Pd	19.03.2020	05.09.2021		
	082.2-3	Development	0,000 Pd	0,000 Pd	0,000 Pd	19.03.2020	05.09.2021		
	082.2-4	Testing	0,000 Pd	0,000 Pd	0,000 Pd	19.03.2020	05.09.2021		
	082.2-5	Documentation	0,000 Pd	0,000 Pd	0,000 Pd	19.03.2020	05.09.2021		
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... and then the processes are concretized. For each task a planned effort in hours or (as in the example) in person days should be stored. The planned effort is the basis for scheduling, resource management, project controlling and, if necessary, for billing. In addition, the activities (for price and cost determination and as a basis for resource planning) should also be assigned.

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	Number	Description	Planning time	Start	End	Occupation	Unit	
	/ 082	Development of a new user interface	0,000 Pd	19.03.2020	05.09.2021		Support	
	4 🔲 082.1	Planning Phase	0,000 Pd	19.03.2020	05.09.2021		Support	
	082.1-1	Catalogue of Requirements	0,000 Pd	19.03.2020	05.09.2021	Interne Tätigkeit		
	082.1-2	Specification	0,000 Pd	19.03.2020	05.09.2021	Interne Tätigkeit		
	4 082.2	Implementation Phase	0,000 Pd	19.03.2020	05.09.2021		Support	
	082.2-1	Design	0,000 Pd	19.03.2020	05.09.2021	Interne Tätigkeit		
	082.2-2	Mockup	0,000 Pd	19.03.2020	05.09.2021	Interne Tätigkeit		
E	082.2-3	Development	0,000 Pd	19.03.2020	05.09.2021	Interne Tätigkeit		
	082.2-4	Testing	0,000 Pd	19.03.2020	05.09.2021	Interne Tätigkeit		
E	082.2-5	Documentation	0,000 Pd	19.03.2020	05.09.2021	Interne Tätigkeit		

Note: If an activity is assigned for which an abstract employee is stored, the corresponding abstract employee is automatically assigned to the task (if configured accordingly) (see also Section 3.7).

Under Actions you will find filter functions that can make your work easier.



Expand Processes: In the project planning toolbar, there are two buttons (+ and -) to expand and collapse the entire element structure. By default, only subprojects are expanded so that you can see the tasks and milestones. If the flag is active, the tasks are also expanded so that the work packages are visible.

Move planned time: If you add detail planning to a work package and then change the time period, the detail plans outside the time period will be deleted. So if the flag is active, the detail plans will be moved as soon as you move the start or end. As a result, the end or the start will be moved accordingly.

Here is an example: Job from 3.5. to 5.5. with detail plan on 3.5.

- without flag: change start to 4.5. and save \rightarrow detail plan was deleted/new period: 4.5. to 5.5.

- with flag: change start to 4.5. and save \rightarrow detail plan is moved to 4.5./end

Show Protocol: If the flag is active, you can display a detailed log of the calculation logic after the forward or backward calculation.

4.7 Process and Schedule Planning

On the basis of the work breakdown structure, you can then create a flow chart and schedule for the project. The first step is to create milestones and then define relationships. In the following example, a milestone is created for each of the two subprojects. First select the subprojects and then click once on the milestone symbol. Projectile then creates the two milestones ...

... and the user then fills in the names of the milestones and saves the project plan.

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	Number	Description	Planning time	Start	End	Occupation	2020 2021	Unit
	/ 📄 082	Development of a new user interface	0,000 Pd	19.03.2020	05.09.2021		Marci Aprili May Julie July Augusepic Octor Nove Decertaintereor Marci April May Julie Ju	Support
	# 🚺 082.1	Planning Phase	0,000 Pd	19.03.2020	05.09.2021			Support
	082.1-1	Catalogue of Requirements	0,000 Pd	19.03.2020	05.09.2021	Interne Tätigkeit		
	082.1-2	Specification	0,000 Pd	19.03.2020	05.09.2021	Interne Tätigkeit		
	26			19.03.2020			★	
	4 082.2	Implementation Phase	0,000 Pd	19.03.2020	05.09.2021			Support
	082.2-1	Design	0,000 Pd	19.03.2020	05.09.2021	Interne Tätigkeit		
	082.2-2	Mockup	0,000 Pd	19.03.2020	05.09.2021	Interne Tätigkeit		
	082.2-3	Development	0,000 Pd	19.03.2020	05.09.2021	Interne Tätigkeit		
	082.2-4	Testing	0,000 Pd	19.03.2020	05.09.2021	Interne Tätigkeit		
	082.2-5	Documentation	0,000 Pd	19.03.2020	05.09.2021	Interne Tätigkeit		
	56			19.03.2020				

Afterwards a "End-Start" relationship is defined between the work packages "Requirements Catalogue" and "Specification". By clicking at the end of the bar of the "Requirements Catalogue" work package and another click at the beginning of the "Specification" work package, an arrangement relationship is created.

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Number	Description	Planning time	Start	End	Occupation	2020 2021 Marct April May June July Augur Septy Octot Nove Dece Janua Febru Marct April May June July Augur Septy	Predecessors
082	Development of a new user interf	0,000 Pd	19.03.2020	05.09.2021			
082.1	Planning Phase	0,000 Pd	19.03.2020	05.09.2021		P	
082.1-1	Catalogue of Requirements	0,000 Pd	19.03.2020	05.09.2021	Interne		1:
082.1-2	Specification	0,000 Pd	19.03.2020	05.09.2021	Interne		2:1
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· 4 082.2	Implementation Phase	0,000 Pd	19.03.2020	05.09.2021		P	
082.2-1	Design	0,000 Pd	19.03.2020	05.09.2021	Interne		4:
082.2-2	Mockup	0,000 Pd	19.03.2020	05.09.2021	Interne		5:
082.2-3	Development	0,000 Pd	19.03.2020	05.09.2021	Interne		6:
082.2-4	Testing	0,000 Pd	19.03.2020	05.09.2021	Interne		7:
082.2-5	Documentation	0,000 Pd	19.03.2020	05.09.2021	Interne		8:
🗇 👫 082.2-A	082.2-A		19.03.2020			•	9:

This relationship is then also transferred in the column "Predecessor". The "Specification" (#2) has "Requirements catalog" (#1) as its predecessor. In the "Predecessor" column, you can also enter the ID of the predecessor directly and the system then generates the relationship.

If only the ID is entered, this defines an "end-start" relationship, otherwise the notation would be "ID AA" for "start-start" relationships. Multiple predecessors (as in the second milestone) are separated by spaces, commas or semicolons.

Scheduling can be done manually (by moving the bars) or automatically based on the network technique. In the example, forward calculation is applied and the schedule is calculated:

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	Number	Description	Planning time	Start	End	Occupation	Marct April	Mav	June Jul	2020 v. Augu: Septr Octob Nov	2021 Decei Januz Febri Marct April May June July Augu-Sept	Predecessors		
	4 🗐 082	Development of a new user interf	0,000 Pd	19.03.2020	05.09.2021			1		,				
0	4 🔲 082.1	Planning Phase	0,000 Pd	19.03.2020	05.09.2021		-	-						
	082.1-1	Catalogue of Requirements	0,000 Pd	05.09.2021	05.09.2021	Interne		Т			Ь	1:		
	082.1-2	Specification	0,000 Pd	05.09.2021	05.09.2021	Interne		T			- 1	2:1		
	55 082.1-A	082.1-A		19.03.2020			++-					3: 2		
	4 🚺 082.2	Implementation Phase	0,000 Pd	19.03.2020	05.09.2021									
	082.2-1	Design	0,000 Pd	05.09.2021	05.09.2021	Interne					<u> </u>	4: 3		
	082.2-2	Mockup	0,000 Pd	05.09.2021	05.09.2021	Interne		Т				5:4		
E	082.2-3	Development	0,000 Pd	05.09.2021	05.09.2021	Interne		T			- H-	6: 5		
	082.2-4	Testing	0,000 Pd	05.09.2021	05.09.2021	Interne		T				7:6		
	082.2-5	Documentation	0,000 Pd	05.09.2021	05.09.2021	Interne					- 1	8:6		
	55 082.2-A	082.2-A		19.03.2020			+					9: 8, 7		

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. All activities and events are entered one after the other in the appropriate calendar from the start of the process, with their respective durations, time intervals, floats, and so on, according to the arrangement relationships.

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.

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	umber	Description	Planning time	Start	End	Occupation			2021 September			Predecessors
							Thu	Fri	Sat	Sun	Mon	
-	082	Development of a new user interf	0,000 Pd	03.09.2021	05.09.2021							
	4 🔄 082.1	Planning Phase	0,000 Pd	03.09.2021	05.09.2021		1					
	082.1-1	Catalogue of Requirements	0,000 Pd	05.09.2021	05.09.2021	Interne			_			1:
	082.1-2	Specification	0,000 Pd	05.09.2021	05.09.2021	Interne			4	M.		2:1
	55 082.1-A	082.1-A		03.09.2021				4				3: 2
	4 🗐 082.2	Implementation Phase	0,000 Pd	03.09.2021	05.09.2021							
	082.2-1	Design	0,000 Pd	03.09.2021	03.09.2021	Interne	L.		20			4: 3
	082.2-2	Mockup	0,000 Pd	03.09.2021	03.09.2021	Interne	L)		23			5:4
	082.2-3	Development	0,000 Pd	04.09.2021	04.09.2021	Interne			*	<u>L</u>		6: 5
2	082.2-4	Testing	0,000 Pd	04.09.2021	04.09.2021	Interne			*	н		7:6
	082.2-5	Documentation	0,000 Pd	04.09.2021	04.09.2021	Interne		L	*	н		8:6
	55 082.2-A	082.2-A		05.09.2021						→ ●		9: 8, 7

Using the "fixed" column, you can exclude any WBS elements from the forward or backward calculation (for example, if milestones are not to be calculated). In the example, the whole sub-project "planning phase" is fixed and the rest of the project is rescheduled:

	20	019	2020			20	19	2020	
fixier (November	Dezember	Januar	Februar	fixier C	November	Dezember	Januar	Februar
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You can also define buffers between WBS elements.

						2021						
	Planning time	Start	End	Occupation	Fixed			September				
						Thu	Fri	Sat	Sun	Mon		
er interf	0,000 Pd	03.09.2021	05.09.2021				-					
	0,000 Pd	03.09.2021	05.09.2021		V		-					
ts	0,000 Pd	05.09.2021	05.09.2021	Interne	V							
	0,000 Pd	05.09.2021	05.09.2021	Interne	V							
		03.09.2021			V							
	0,000 Pd	05.09.2021	05.09.2021									
	0.000 Pd	05.09.2021	05.09.2021	Interne						7		
×												
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In the example, a five-day buffer is defined between the "Design Acceptance"

(milestone) and the first work package of the "Design" implementation phase (to wait for the customer's acceptance, for example). After a new forward calculation, the subsequent work packages are shifted accordingly:



4.8 Resource Planning

For the example, the following project planning options apply, whereby the first three options are particularly relevant. Absences should be displayed in planning, "Display suitable employees" displays all employees who have assigned the work package activity in the employee data, and "Calculate workload" calculates the workload for the employee in the work package period.

In project planning, all employees who have assigned the required activity are then displayed (with the above settings) for the work packages with workload information. In the example, the work package "requirements catalog" displays the workload of consultants in the period between 11/04/19 and 11/06/19.

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	Number	Description	Planning time	Start	End	Occupation	Employee					
	4 🗐 082	Development of a new user interf	0,000 Pd	03.09.2021	05.09.2021							
	4 082.1	Planning Phase	0,000 Pd	03.09.2021	05.09.2021							
	082.1-1	Catalogue of Requirements	0,000 Pd	05.09.2021	05.09.2021	Support	Schaub Peter 🗸					
	082.1-2	Specification	0,000 Pd	05.09.2021	05.09.2021	Support	Name	First name	Estimated load ~	Load	MaxLoad	
	55 082.1-A	082.1-A		03.09.2021			*Support		0.0%	0.0%	300.0%	
	4 🗐 082.2	Implementation Phase	0,000 Pd	05.09.2021	05.09.2021		Dohle	Hannah	0.0%	0.0%	100.0%	
	082.2-1	Design	0,000 Pd	05.09.2021	05.09.2021	Project Management	Franke	Heiner	0.0%	0.0%	100.0%	
	082.2-2	Mockup	0,000 Pd	05.09.2021	05.09.2021	Project Management	Müller	Klaus	0.0%	0.0%	100.0%	
	082.2-3	Development	0,000 Pd	05.09.2021	05.09.2021	Project Management	Möller	Marjan	0.0%	0.0%	100.0%	
	082.2-4	Testing	0,000 Pd	05.09.2021	05.09.2021	Project Management	Raber	Olivia	0.0%	0.0%	100.0%	
	082.2-5	Documentation	0,000 Pd	05.09.2021	05.09.2021	Project Management	Zöllner	Pla	0.0%	0.0%	100.0%	
	55 082.2-A	082.2-A		05.09.2021			Schaub Peter					-

The different workloads in the selection box first show the workload of all planned and running projects, then the workload of only running projects and the third value shows the project availability. If several employees are to work on tasks, the "Split task" dialog box can be used for this assignment (work package and employees). To do this, first select the activity and then click once or more than once on the "Split" icon (in this case twice). Projectile then creates the work packages for the operation.

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	Number	Description	Planning time	Start	End	Occupation	Employee	
	4 🗐 082	Development of a new user interf	0,000 Pd	03.09.2021	05.09.2021			
	# 082.1	Planning Phase	0,000 Pd	03.09.2021	05.09.2021			
	082.1-1	Catalogue of Requirements	0,000 Pd	05.09.2021	05.09.2021	Support	Schaub Peter	
	082.1-2	Specification	0,000 Pd	05.09.2021	05.09.2021	Support	Schaub Peter	
	55 082.1-A	082.1-A		03.09.2021			Schaub Peter	
	4 🔲 082.2	Implementation Phase	0,000 Pd	05.09.2021	05.09.2021			
	082.2-1	Design	0,000 Pd	05.09.2021	05.09.2021	Project Management	Schaub Peter	
	082.2-2	Mockup	0,000 Pd	05.09.2021	05.09.2021	Project Management	Schaub Peter	
	# 🚺 082.2-3	Development	0,000 Pd	05.09.2021	05.09.2021	Project Management	Schaub Peter	
	3 082.2-3	Development	0,000 Pd	05.09.2021	05.09.2021	Project Management	Schaub Peter	
	1		0,000 Pd	05.09.2021	05.09.2021	Project Management	Schaub Peter	
	1		0,000 Pd	05.09.2021	05.09.2021	Project Management	Schaub Peter	
E	3 082.2-4	Testing	0,000 Pd	05.09.2021	05.09.2021	Project Management	Schaub Peter	
	082.2-5	Documentation	0,000 Pd	05.09.2021	05.09.2021	Project Management	Schaub Peter	
	55 082.2-A	082.2-A		05.09.2021			Schaub Peter	

In the following example, two additional employees are assigned for the "Development" work package. In addition to Oliver Schröder, the employees Frank Behn and Ute Klaube are also to be scheduled. After assigning the employees in the selection box, the effort can be distributed. After resource planning and forward calculation, a new schedule then results:

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	Number	Description	Planning time	Start	End	Occupation	Employee			2021 September			Predec
E	4 092	Davelonment of a new user interf	0.000 Pd	03 00 2021	05 00 2021			Thu	Fri	Sat	Sun	Mon	
E	4 082 1	Planning Phase	0.000 Pd	03.09.2021	05.09.2021							4	
E	082.1-1	Catalogue of Requirements	0,000 Pd	05.09.2021	05.09.2021	Support	Schaub Peter						1:
0	082.1-2	Specification	0,000 Pd	05.09.2021	05.09.2021	Support	Schaub Peter			4	(5	2:1
	55 082.1-A	082.1-A		03.09.2021			Schaub Peter		+				3: 2
	4 🚺 082.2	Implementation Phase	0,000 Pd	05.09.2021	05.09.2021							4	
	082.2-1	Design	0,000 Pd	05.09.2021	05.09.2021	Project Managem	Schaub Peter			4		5	4: 3+
	082.2-2	Mockup	0,000 Pd	05.09.2021	05.09.2021	Project Managem	Schaub Peter			4		3-	5:4
	4 🚺 082.2-3	Development	0,000 Pd	05.09.2021	05.09.2021	Project Managem				4	(37	6: 5
	3 082.2-3	Development	0,000 Pd	05.09.2021	05.09.2021	Project Managem	Schaub Peter					2	
	082.2-6	Development	0,000 Pd	05.09.2021	05.09.2021	Project Managem	Schaub Peter					□ ◀	-
	8 082.2-7	Development	0,000 Pd	05.09.2021	05.09.2021	Project Managem	Schaub Peter					3	
	082.2-4	Testing	0,000 Pd	05.09.2021	05.09.2021	Project Managem	Schaub Peter			4	C	3-	7:6
	082.2-5	Documentation	0,000 Pd	05.09.2021	05.09.2021	Project Managem	Schaub Peter			4		Н	8:6
	55 082.2-A	082.2-A		05.09.2021			Schaub Peter				90		9: 8, 7

In the project on the "General Data" tab, the subprojects/activities/milestones are located in the "Structure" frame:

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General data S	takeholders	Proposal	Portfolio	Risk assessment	t Status	Key figures	Calculation	Billing documents	Order data Log	gbook Final Repo	rt Misc		
Basic informa	ition												
Number	082					Status	Passive	in the second					
Description	Development of a new user interface												
Contents description	new user interface for Projectile including enhancements in the dashboard builder												
Start of planning Note	tart of planning 03.09.2021 Image: Control of planning 05.09.2021 Image: Control of												
E Structure													
Main project	082 De	velopment of	a new user inter	Parent									
				project						1			
Subordinate		+ Number	 Descrip 	ption Stati	US	Begin plannin	g End plannin	p Project manage	rs Target time	Planning time	Actual time	Exter LastStateEstin	ate EnterNewState
projects		1 082.1	Plannir	ng Phase Pass	ive	03.09.2	021 05.09.20	21 Schaub Peter	00:00	00:00	00:00		
	percent li	2 002 2	Implan	montation Dace	ive	05.09.2	021 05.09.20	21 Schaub Peter	00:00	00:00	00:00		
		2 082.2	implen	rendour rass									

4.9 Succession processes

Activate calculation, offers, orders, project (see part 5).