



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

# Help, Part 7: Time Tracking, Reporting

#### **Table of Contents**

7.1 Time Tracking (TimeTracker)	2
7.2 Absences	
7.3 Reporting of the Work Packages	13
7.4 Free Work Packages	13
7.5 Period-end Closing	14
7.6 Billable Expenses	17
7.7 Remaining Expenses & Percentage of Completion	20
7.8 Risks	23
7.9 Status Report and Change Request	24

# 7.1 Time Tracking (TimeTracker)

The "TimeTracker" enables time tracking for working and project times. Here, all "active" work packages are listed for the project member, which are not yet completed and for which he is responsible. When a project member logs on to the system, the employee is determined and the respective work packages are displayed during online time tracking.

In addition, absences (vacation, illness, ...) and estimates (remaining work and/or degree of completion) can also be recorded here. A further possibility is the completion notification of the tasks in the TimeTracker and the completion of the work packages.

The TimeTracker is located in the main menu (Entry - Services - TimeTracker), in the portal (if configured by the administrator) or in the work area.

In the example the TimeTracker is opened for the 02.07.2021 (from 02.07. and until 02.07.2021). The TimeTracker can also be opened for several days (in the interval "from" and "to") or (with sufficient permission) for other employees.



The TimeTracker consists of two parts: The upper part ("TimeSheet") is used to record project activities, working hours and absences and also contains the date selection. The lower part ("ToDo list") is used, among other things, to record activities on work packages using a stopwatch functionality (red triangle in the line of the work package) and can also be used for reportings.

	Tracker Sch	idub reu	er									-12
3	21.06.2021	•		tions + I	Filter -		Date S	election				
1 💌												Filter
	From	То	Hours	Billable h	Job	N	ote					
ay 01: 1	Monday, 21	L.06.2021	L CW25 🗹	<b>D</b>								
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2												_
3											Time Sheet	
4												
5												
			00:00	00:00								
		2 06 202		Pb.								
C .		2.06.202	1 CW25 🗹	<b>D</b>								
		2.06.202	1 CW25 🖌	6								
	3											Filter
	Services and the service of the serv		1 CW25 🖌		Project	Customer	Due time	Estimated time	Actual time	Time to completion		Filter
1	Process iii)       022.2.2-1	number			Project Schnittstellen	Customer Consult Softw		Estimated time	Actual time	Time to completion		Filter
2 P	<ul> <li>Process r</li> <li>022.2.2</li> <li>047-1</li> </ul>	number	dott	Fickets			var 31.08.2020			Time to completion	To Do List	Filter
1 V 2 V 3 V	<ul> <li>Process i</li> <li>022.2.2-</li> <li>047-1</li> <li>047.1-1</li> </ul>	number	TTJob Aufgabe mit T	Fickets	Schnittstellen	Consult Softw	var 31.08.2020 var 19.03.2020	24	0	Time to completion	To Do List	Filter
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1 9 2 9 3 9 4 9 5 9	<ul> <li>Process</li> <li>022.2.2-</li> <li>047-1</li> <li>047.1-1</li> <li>045.1-2</li> <li>049-1</li> </ul>	number	TTJob Aufgabe mit T Projektmanag Konzeption	Fickets	Schnittstellen Einführung EPM Planung	Consult Softw Consult Softw Consult Softw	var 31.08.2020 var 19.03.2020 var 11.07.2020	24 20 224	0 33,5 23,5	Time to completion	To Do List	Filter
1 9 2 9 3 9 4 9	<ul> <li>Process</li> <li>022.2.2-</li> <li>047-1</li> <li>047.1-1</li> <li>045.1-2</li> <li>049-1</li> </ul>	number	TTJob Aufgabe mit T Projektmanag Konzeption Spezifikation	Fickets	Schnittstellen Einführung EPM Planung Planung	Consult Softw Consult Softw Consult Softw	var 31.08.2020 var 19.03.2020 var 11.07.2020 25.03.2020	24 20 224 38	0 33,5 23,5 34,5	Time to completion	To Do List	Filter
1 9 2 9 3 9 4 9 5 9	<ul> <li>Process a</li> <li>022.2.2-</li> <li>047-1</li> <li>047.1-1</li> <li>045.1-2</li> <li>049-1</li> <li>059.2-2</li> </ul>	number	TTJob Aufgabe mit T Projektmanag Konzeption Spezifikation AP 1	Fickets	Schnittstellen Einführung EPM Planung Planung Test	Consult Softw Consult Softw Consult Softw	var 31.08.2020 var 19.03.2020 var 11.07.2020 25.03.2020 12.06.2020	24 20 224 38 56	0 33,5 23,5 34,5 14,25	Time to completion	To Do List	Filter
2 文 3 文 4 文 5 文	<ul> <li>Process</li> <li>022.2.2-</li> <li>047-1</li> <li>047.1-1</li> <li>045.1-2</li> <li>049-1</li> <li>059.2-2</li> <li>059.2-3</li> </ul>	number	TTJob Aufgabe mit T Projektmanag Konzeption Spezifikation AP 1 e2	Fickets	Schnittstellen Einführung EPM Planung Planung Test umsetzung	Consult Softw Consult Softw Consult Softw	var 31.08.2020 var 19.03.2020 var 11.07.2020 25.03.2020 12.06.2020 17.07.2020	24 20 224 38 56 40	0 33,5 23,5 34,5 14,25 0	Time to completion	To Do List	Filter

The following example shows how to record activities, attendances and absences in the upper part (TimeSheet) The time fields are used to enter clock times or total hours. The first two columns define the start time (from) and the end time (to). The third column lists the duration, that is, the time difference between the start and stop time. In the last column, the work packages or the indicators for attendances and absences can be selected and assigned to the time. In the example below, 3:15 hours were recorded for the task "Create requirements specification". Subsequently, 2:15 hours from 13:00 were booked for the work package "Conceptual discussions" and finally, a duration of 2:30 was entered for the task "Create requirements specification". For each time entry the user has entered additional remarks.

The system completes the missing values by saving them. After saving, the recorded times also appear in the lower part of the time tracker (to-do list) in the column Actual Time for the respective work packages.

( 💟	Time	Tracker	Schau	b Peter	r									-(-)
]	🝰   2	26.07.20	21	•	🔹 🕑   Ac	tions 🕶	Filter 🕶							
	<b></b>													Filter
		From	n	То	Hours	Billable	Job			Note				
Da	ay 01: P	Monday	, 26.07	7.2021	CW30 🗹									
	1	09	:00		12:15		001.2-4 Cre	ate Requirements Spe	cification - 1.2					
	2	13	:00		15:00		001.2-5 Co	nceptual Discussion - 1	1.2 Customizing					
	3 💽					02:30	001.2-4 Cre	ate Requirements Spe	cification - 1.2					
	4 💽													
	5 💽													
					27:15	02:30								
Da	ay 02: 1	Tuesday	, 27.0	7.2021	CW30 🛷	<b>D</b>								
	6													
	7 💽													
	2	<b>š</b>												Filter
		Proc	ess num	nber	TTJob	Pre	ject	Customer	Due time	Estimated time	Actual time	State [%]	Time to completion	n
	1 🕏	001.	2-4		Create Requir	e Cu	stomizing	Autobau AG	12.01.2020	12	0			
	2 🖓	001.	2-5		Conceptual Di	sc Cu	stomizing	Autobau AG	12.01.2020	24	0			

The TimeTracker can also be used to record times after. With the help of the date selection the day of the tracking can be changed. In the example below you want to record times for the previous day. The function "previous" in the date element ...

× 🔮	TimeTracke	r Schaub Pet	er				-⊳ ⇔ ≡
8	26.07.2	021 🔹 🗖	1 💽 🕑 🛛 Ac	tions 🕶 🛛	Filter 🕶		
🔛	<b></b>						Filter
	Fro		Hours	Billable h	Job	Note	
		iy, 27.07.202	1 CW30 🗹	4			
	5 💽						
	7 💽						
	3 💽						
	• 💽						
<b>1</b>	) 💽						
			00:00	00:00			
🗉 Day	03: Wedne	sday, 28.07.	2021 CW30	🗸 🐚			
1	ι 💽						
1	2						
							Filter

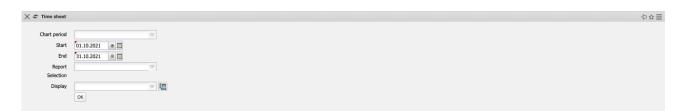
... changes the entry date and the subsequent entry of times can be carried out.

					Filter •		
ø							Filter
	From	То	Hours	Billable h	Job	Note	
01: Th	nursday, 3	0.09.202	1 CW39				
	09:30		03:00		001.2-4 Create Requirements Specification - 1.2	Comment 3	
	13:30	18:30			001.2-5 Conceptual Discussion - 1.2 Customizing	Comment 4	]
							1
			03:00	00:00			
	1: Tř 😨	From 1: Thursday, 3 9:30 13:30 2 2 2 2 2 2 2 2 2 2 2 2 2	From         To           1: Thursday, 30.09.202	From         To         Hours           1: Thursday, 30.09.2021 CW39	From         To         Hours         Billable I           11: Thursday, 30.09.2021 CW39         03:00         03:00           13: 30         18:30         03:00           2         2         04:00         04:00           2         19:30         18:30         04:00	From         To         Hours         Billable h         Job           11: Thursday, 30.09-2021 CW39	From         To         Hours         Bilable h Job         Note           11: Thursday, J0.09.2011 CW39         01.24 Grate Requirements Specification - 1.2         Comment 3           11: Thursday, J0.09.2011 CW39         01.24 Grate Requirements Specification - 1.2         Comment 3           11: Thursday, J0.09.2011 CW39         01.24 Grate Requirements Specification - 1.2 Customizing         Comment 4           11: Thursday, J0.09.2011 CW39         01.25 Conceptial Discussion - 1.2 Customizing         Comment 4           11: Thursday, J0.09.2011 CW39         International Comment 4         International Customizing

In the example, 3 hours from 9:30 are recorded on the work package "Create requirements specification" and then times from 13:30 to 18:30 (5 hours) on the work package "Conceptual Discussions".

I I I I         Image: Show free jobs         Filter           I I I I I I I I I I I I I I I I I I I	< 😳 TimeTracker Schaub Peter				中立
Image: Property in the set of th	20.09.2021 💿 🔳 💿 💽	Actio	ons 🕶 Filter 🕶		
I Part 01: Monday, 20.09.2021.CW3       I Request absences         I Part 1       Request absences         I Part 1       I Part 1         I Part 1       I Par		۲	01 - Finalize last month	Note	Filter
2     2     2     1     Immediated (oktrani)       3     2     1     1     1       4     2     1     1     1       5     2     1     Absences	🗄 Day 01: Monday, 20.09.2021 CW38 🛛 🗸				
3     Image: Second control of the secon		si.	Time sheet (external)		
S Q Absences	3 🚘	_			
00: Service report	- · · · 🐹	_			
	00:(	۵.	Service report		
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In the TimeTracker, every employee can generate reportings for himself and a freely definable period of time. In the example the reporting "timesheet" is called up for the entered period and executed with "Ok".



This reporting provides an overview of the project activities and working times of employees in the selected time interval. The project activities are based on the data entered in the TimeTracker for the employees' work packages. The working time data is either entered as "come-to-work" or can be automatically determined by the system as the sum of the project times with the help of an option. The absences (vacation, sick leave, maternity protection, ...) can be defined decentrally in the TimeTracker or centrally in the absence tracking. Optionally, the bookings from the working time accounts and a list of the booked work packages can be displayed.

Schaub, F	Datar Dar	eonne	I Nur	ber - 0	03			
						Differenz	Externe Bemerkung	Interne Remerkung
	Total	Total	Total	Total	Total	Total	Total	interne bernerkung
01.09.2021		.o.ai	10101		0.00	-8,00		
02.09.2021				8,00				
03.09.2021	Evi			6,00				
04.09.2021				0,00				
05.09.2021				0.00				
06.09.2021				8,00				
07.09.2021				8,00				
08.09.2021	Mod			8,00	0,00	-8,00		
09.09.2021				8,00				
10.09.2021				6,00				
11.09.2021				0,00				
12.09.2021	Sat			0,00		0,00		
13.09.2021				8.00				
14.09.2021				8,00		-8,00		
15.09.2021				8,00				
16.09.2021				8,00				
17.09.2021	Thu			6,00	0,00			
18.09.2021				0.00				
19.09.2021				0,00				
20.09.2021								
				8,00				
21.09.2021				8,00				
22.09.2021				8,00				
23.09.2021				8,00				
24.09.2021				6,00				
25.09.2021				0,00				
26.09.2021				0,00				
27.09.2021				8,00				
28.09.2021	Tue			8,00	0,00	-8,00		
29.09.2021	Wed			8,00	0.00	-8,00		
30.09.2021	Thu			8,00	0.00	-8,00		
01.10.2021				6,00	0,00	-6,00		
Total					0,00			
				.,				
Chart for in	terval:			01.09.2	021 - 01	1.10.2021		
Planned tim				174,00				
Tracked tim				0.00				
Balance	· [··]			-174,00				
Datalios								
Vacation tak	(en			0.00 (h)				
- action for				0,00 Da				
				0,00 00	,,(-)			

The reporting "time statements" ...

EmployeeOccupat	ion					
Description	Job	Employee	Occupation	Ist-Beginn	Ist-Ende	Actual [h]
Entwicklung Modul B0	001.1-1 Konzeption		Beratung	02.12.2019	06.12.2019	22,50
Entwicklung Modul A	002.1-3 Pflichtenheft	Schaub Peter	Beratung	02.12.2019	17.01.2020	37,00
Entwicklung Modul C	003.1-2 Konzeption	Schaub Peter	Beratung	02.01.2020	12.03.2020	36,50
Einführung EPM	005.2-5 Testen	Schaub Peter	Support	16.01.2020	12.03.2020	19,25
Entwicklung Modul B	011.2-5 Testen	Schaub Peter		10.12.2019	08.01.2020	14,00
Einführung Projectile	014.1-1 Konzeption	Schaub Peter		05.12.2019		
Entwicklung Modul J	019-1 Testfälle definieren		Interne Tätigkeit		30.03.2020	
Entwicklung Modul J	019-2 019-2		Interne Tätigkeit		12.12.2019	
Einführung EPM	043.1-1 Konzeption	Schaub Peter		25.02.2020		
Einführung EPM	043.1-2 Spezifikation	Schaub Peter		24.02.2020		
Einführung EPM	045.1-2 Spezifikation	Schaub Peter			30.03.2020	
Einführung EPM	047-1 Projektmanagemen		Project Management			
Einführung EPM	047.1-1 Konzeption	Schaub Peter			13.02.2020	
Test - PD	048-1 AP	Schaub Peter	Beratung - Senior	23.03.2020	24.03.2020	
						220,00
Einzelnachweise						
Date Time P	roject Jo	b	Occupation	Err	plovee	TTComment
02.12.2019 4.00 0	01.1 Planung 00	01.1-1 Konzeption	n Beratung	Col	haub Poter	Bemerkung 1
	71.1 Planung 00	JI.I-I Konzepuor				
		02.1-3 Pflichtenhe				Bemerkung 2
02.12.2019 4,00 0	02.1 Konzeption 00		oft Beratung	Sci	haub Peter	
02.12.2019 4,00 0 03.12.2019 3,75 0 03.12.2019 5,25 0	02.1 Konzeption 00 01.1 Planung 00 02.1 Konzeption 00	02.1-3 Pflichtenhe	eft Beratung n Beratung	Sci Sci	haub Peter haub Peter haub Peter	Bemerkung 2 Bemerkung 3 Bemerkung 4
02.12.2019 4,00 0 03.12.2019 3,75 0 03.12.2019 5,25 0 04.12.2019 4,00 0	02.1 Konzeption 00 01.1 Planung 00 02.1 Konzeption 00 01.1 Planung 00	02.1-3 Pflichtenhe 01.1-1 Konzeption 02.1-3 Pflichtenhe 01.1-1 Konzeption	eft Beratung n Beratung eft Beratung n Beratung	Sci Sci Sci	haub Peter haub Peter haub Peter haub Peter	Bemerkung 2 Bemerkung 3 Bemerkung 4 Bemerkung 5
02.12.2019 4,00 0 03.12.2019 3,75 0 03.12.2019 5,25 0 04.12.2019 4,00 0 04.12.2019 3,00 0	02.1 Konzeption 00 01.1 Planung 00 02.1 Konzeption 00 01.1 Planung 00 02.1 Konzeption 00	02.1-3 Pflichtenhe 01.1-1 Konzeption 02.1-3 Pflichtenhe	eft Beratung n Beratung eft Beratung n Beratung eft Beratung	Sci Sci Sci Sci	haub Peter haub Peter haub Peter haub Peter haub Peter	Bemerkung 2 Bemerkung 3 Bemerkung 4

... provides an overview of the employees' project work and a list of the individual activities with the remarks from time tracking. This reporting generates an overview of the total and individual time statements of an employee based on the tracking in the TimeTracker. The reporting is usually used for internal proof for controlling or as an external proof as an attachment for invoicing.

Time can be recorded on the work packages using a stopwatch functionality. To start the time tracking, click on the clock in the line of the relevant work package (here "Create Requirements Specification"). The time tracking for this task has now started (here from 11:37).

1       11:37       001.24 Grade Requirements Specification - 1.2         2       1       1         3       2       1         4       2       1         5       2       1	10.2021 CW39	2 🖉 👘										Filte
	001.2-4 Create Requirements Specification - 1.2       001       <		From To	Hours Billa	ble h Job	1	lote					
	Image: second	Day 01: Fri	day, 01.10.2021 0	W39								
		1 🙀	11:37		001.2-4 Create Requir	rements Specification - 1.2						
	0:00     0:00	2 🙀										
	Image: Constraint of the second of	3 🙀										
	00:00         00:00											
	00:00         00:00											
	00:00 00:00	6 🧝										
00:00				00:00 00:	00							
	Fite	)   🔁   📝										Filte
				TTJob	Project Cu	stomer Due time	Estimated time	Actual time	State [%]	Time to completion		Filte
Process number         TDob         Project         Due time         Estimated time         Actual time         State [%]         Time to completion           1         1         C         001.2-4         Create Require.         Qustomizing         Autobau AG         12 0.12020         12         3         3			Process number					Actual time	State [%]	Time to completion		Filte

Acquisition on this task is stopped when ...

-	01	.10.2021	•	• • /	ctions 🕶	Filter 🕶		
	<b>4</b>							Fit
		From	То	Hours	Billable h	Job	Note	
Day	01: Fri	day, 01.1	0.2021 CV	/39				
1		11:37	11:38	00:01	00:01	001.2-4 Create Requirements Specification - 1.2		
		11:38	14:38	03:00	03:00	001.2-5 Conceptual Discussion - 1.2 Customizing		
3								
4								
5								
6								
7								
				03:01	03:01			

... is posted to the next task (here "Conceptual Discussion"). In the example, the second task was started at 11:38, so the entry to the first work package also ends here. If the clock is clicked again, the time tracking ends. In the example below 0:01 (1 minute) was recorded. The data can still be annotated and saved.

#### 7.2 Absences

If employees are to request their own leave or other absences, the "Leave Request" functionality can be used. After executing the action in the TimeTracker (or from the work area) ...

😳 TimeTracker Schaub Peter		-6
🝰 26.07.2021 🔹 🔳 🕚 🕑	Actions - Filter -	
From To Hou	Show free jobs     U1 - Finalize last month     Note	Filter
	02 - Hitalize currenc	
Day 01: Monday, 26.07.2021 CW30	Request absences	
1 2 2	Time sheet (external)	
3	Attendances and absences	
5 📡	Absences     Service report	
Day 02: Tuesday, 27.07.2021 CW30		
6		

... a dialogue opens for the request for leave. Here, the user can request absences (time off in lieu, rest leave and special leave) and cancel requested or approved absences. In the following example ...

🗙 🚫 Request a	bsences					-⊅ ☆ ☰
3	800		01.10.2021 0		01.04.2022 • 🔲 🕨 🕅	
Q 16		202 Octo	ber November	2022 December Janua 7 48 49 50 51 52 1		
	Meier Jana (Holiday) Meier Jana (SpareTimeComp	1				
	Scheduled Applied-for full/half	day Confirmed full/half da		Applied-for removal		
			holiday			
Holiday entitleme		Requested holiday	Remaining holiday	Requested holiday	Approved holiday next year	
(as of 31.12.)	(as of 31.12.)	(as of 31.12.)	requested holiday	next year	(as of 31.12.)	
			(as of 31.12.)	(as of 31.12.)		
55,0 1	Days 55,0 Days	2,0 Days	53,0 Days	0,0 Days	0,0 Days	
Choose Absence	Comment					
	Comment					 
Holiday	▽					
Time period			1			
05.10.2021	- 10.10.20	21 O 🔲 Apply				
Remove Absence			•			
		e 🔲 Remove				

... the registered user requests leave from 05.10.2021 to 10.10.2021. After confirming the request, the requested leave is visualized in the voting dialog and the superior defined in the workflow (manager, personnel, project manager, team leader, ...) receives an internal notification ("messages"). In the example the team leader of the applicant is informed and receives a vote.

Ballot	InitiatedWorkflows
Hy Ballots: 14 Show all ballots	
Absence request Ellers Hans, SpareTimeCompensation from 19.03.2020 to 20.03.2020	
Absence request Zöllner Pia, Holiday from 09.03.2020 to 13.03.2020	
Foreign invoice line confirmation 15-1 Pos 1 2.300,00	
Foreign invoice line confirmation 10-1 pos 1 1,00	
Absence request Meler Jana, Holiday from 02.10.2021 to 05.10.2021	
Foreign invoice line confirmation ForeignInvoice 5543 2-3 1.000,00	
Foreign invoice line confirmation 18-1 Pos 1 1.000,00	
Foreign invoice line confirmation 18-2 Pos 2 1.200,00	
Foreign invoice line confirmation ForeignInvoice 5543 15-3 1.200,00	
Absence request Meier Jana, Holiday from 05.10.2021 to 10.10.2021	

In the menu item "Reconciliation" in the dock bar the reconciliation can be opened and the vacation can be approved or rejected.

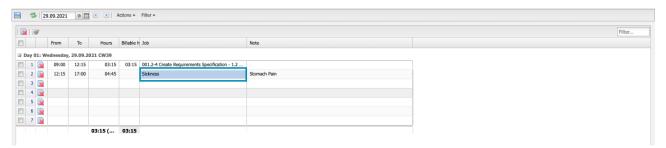
🗙 🥝 Vote				
	and give a comme	nt		
Workflow	Absence request			
Voting	Unitleiter			
group				
Comment				
Employee		Meier Jana		
Start		05.10.2021		
End		10.10.2021		
Presence		Holiday		
Days applied-	for	3,0 d	]	
Remaining Ho	olidays after approval	52,0 d	]	
Rest Holidays	and flex time			
Absences				
Vote				
Comment				
No comment	1			7
	_			
Agree	Disagree			
Cancel				

Depending on the reconciliation result, the leave is graphically displayed in the TimeTracker's leave request as leave or rejected leave:

🗙 🚫 Request a	ibsences
13	
Q	
16	October No 39 Week 40 Week 41 Week 42 Week 43 W
2	1 2 3 4 5 6 7 8 9 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
	Meier Jana (SpareTimeCompensation) Scheduled Applied-for full/half day Confirmed full/half day Denied Bank Applied-for removal
	holiday

After successful reconciliation, the absence (in this case vacation) is automatically entered in the system and no longer needs to be recorded.

The following example demonstrates decentralized absence tracking (in this case, sick leave by the hour):



After 3:15 project times on the work package "Create Requirements Specification" the employee was sick and entered this for the rest of the day.

Absences can also be posted centrally using the "Absences for other employees" functionality. Here you first select the employees (even several) or the unit (all employees in a unit) and the period.

In the example, attendance tracking is opened for the three employees (Wollert, Behn, Meier) for the period 10/01/2021 to 10/31/2021. All defined absences and locked days are displayed in the tracking. The locked days are days on which the employee has already recorded times or for which time tracking is no longer permitted.

Administration Constructions Administration File Customer relationship manage Human resources Employees Employees Contracts Cocparization structure Cocparization structur	Begin 01.10.2021 0	V First name Babara Arvid Tamara V			± ₽¢
Customer relationship manage  Customer relationship manage  Customer relationship manage  Pleas Employee contracts  Comparization structure  Working me accounts  Working me accounts  Comparization structure  Com	Imployee         •         Name           1         Wollert         2           2         Behn         3           3         Meier         0           inits         •         •           01.10.2021         •         0	First name Barbara Arvid Tamara			
Burchards and manager     Burchards resultances     Burchards     B	Imployee         •         Name           1         Wollert         2           2         Behn         3           3         Meier         0           inits         •         •           01.10.2021         •         0	First name Barbara Arvid Tamara			
Employees     Employee contracts     Asserce explositation     Working time accounts     Outry and the second se	Image: Name         Name           1         Wollert         2           2         Behn         3           3         Meer         Meer           Inits         Image: Non-Operation         0           inits         Image: Non-Operation         0           inits         Image: Non-Operation         0           inits         Image: Non-Operation         0	First name Barbara Arvid Tamara			
Employee contracts     Desence registration     Working me accounts     Organization structure	1         Wollet           2         Benn           3         Mein           image         Description           login         01.10.2021           image         31.10.2021	Barbara Arvid Tamara			
Absence registration     Working time accounts     Organization structure     Coupations     Units     Organization structure     Coupations     Organization structure     Organization structure     Organization     Organizion     Organization     Organization     Organization     Organiza	1         Wollet           2         Benn           3         Mein           image         Description           login         01.10.2021           image         31.10.2021	Barbara Arvid Tamara			
Working time accounts     Working time accounts     Working time accounts     Working time accounts     Working structure     Couption     Mounty rates	2         Behn           3         Meler           Inits         Image: Construction of the second seco	Tamara			
Organization structure     Organization structure     Coccupations     Organization structure     Organization structure     Organization structure     Organization     Organization structure     Organization     Organizat	Inits				
Cocupations Cocup	Image: Provide the second se	×			
Hourly rates     Hourly rates     Hourly rates     Hourly rates     Lock time tracking     Project management     Purchasing and procurement     Softer and order	legin 01.10.2021 •				
Grant     Gueries     Gue	ind 31.10.2021 ©				
Cont	ind 31.10.2021 ©				
Quenes Quenes Lock time tracking Project management Purchasing and procurement Offer and order					
Project management Project management Purchasing and procurement Offer and order	Start				
Differ and order					
)) Offer and order					
29 Teaching					
1 Indexing					
C Billing					
Ticket management					
📄 Risk management					
Query manager					
4 Filter					
📆 Team calendar					
🐝 Info market					
🐺 Forum					
Sticky Notes					
iii Settings					
Bulk print					

The selection boxes contain the absences defined by the administrator and sometimes "\*end" entries. The "\*end" entries can be used for longer absences and "delete" is used to delete existing entries.

Preview	Reset	Save		Close			
Employee	Wollert Barbara	Behr	Arvid	Meier Tamara			
Fr 01.10.2021		$\bigtriangledown$	$\bigtriangledown$				
Sa 02.10.2021							
Su 03.10.2021							
Mo 04.10.2021		$\overline{\nabla}$	▽		$\bigtriangledown$		
Tu 05.10.2021		$\bigtriangledown$	▽		$\bigtriangledown$		
We 06.10.2021	HalfVacation	$\overline{\nabla}$		Sickness	$\bigtriangledown$		
Th 07.10.2021		⇒ Ho	liday 🗢	Sickness	$\bigtriangledown$		
Fr 08.10.2021			liday 🗢				
Sa 09.10.2021							
Su 10.10.2021							
Mo 11.10.2021			liday 🗢	Sickness	$\bigtriangledown$		
Mo 11.10.2021 Tu 12.10.2021		▽ Ho	liday 🗢	Sickness	₽		
Tu 12.10.2021		~	~				
Tu 12.10.2021 We 13.10.2021			<b>₽</b>				
Tu 12.10.2021 We 13.10.2021 Th 14.10.2021			\ ↓ ↓ ↓ ↓	Sickness Meier Tamara			
Tu 12.10.2021 We 13.10.2021 Th 14.10.2021 Employee			⇒ nn Arvid	Sickness Meier Tamara			
Tu 12.10.2021 We 13.10.2021 Th 14.10.2021 Employee Fr 15.10.2021			⇒ nn Arvid	Sickness Meier Tamara			
Tu     12.10.2021       We     13.10.2021       Th     14.10.2021       Employee       Fr     15.10.2021       Sa     16.10.2021       Su     17.10.2021	Wollert Barbara	P           P           P           P           P           P           P           P           P           P           P	⇒ nn Arvid	Sickness Meier Tamara			
Tu         12.10.2021           We         13.10.2021           Th         14.10.2021           Employee         17.10.2021           Sa         16.10.2021           Su         17.10.2021           Mo         18.10.2021	Wollert Barbara		nn Arvid	Sickness Meier Tamara	0		
Tu         2.1.0.2021           We         1.3.10.2021           Th         1.4.10.2021           Employee         3.1.0.2021           Sa         1.6.10.2021           Su         1.7.10.2021           Su         1.8.10.2021           Mu         1.8.10.2021           Mu         1.9.10.2021	Wollert Barbara	P         Bell           P         Bell           P         D           P         D	nn Arvid	Sickness Meier Tamara			
Tu         12.10.2021           We         13.10.2021           Th         14.10.2021           Employee         17.10.2021           Sa         16.10.2021           Su         17.10.2021           Mo         18.10.2021	Wollert Barbara	P       P       P       P       P       P       P       P       P       P	nn Arvid	Sickness Meier Tamara			

In the example, "Half Vacation" is entered for the employee Wollert on 06.10.2021 and for Behn between 07.10.2021 and 12.10.2021 and saved in the database with "Save":

🗢 TrackEmp	loyeePresencesView					
Preview	Reset		Save		Close	
Employee	Wollert Barbara		Behn Arvid		Meier Tamara	
Employee	wollert Barbara		Benn Arvid		meier Tamara	
Fr 01.10.2021		$\bigtriangledown$		$\bigtriangledown$		
Sa 02.10.2021						
Su 03.10.2021						
Mo 04.10.2021		~		~		~
Tu 05.10.2021		~		~		▽
We 06.10.2021		~			Sickness	~
Th 07.10.2021		~	Holiday		Sickness	~
Fr 08.10.2021		~	· · · · · · · · · · · · · · · · · · ·	~	Jiel less	
Sa 09.10.2021						
Su 10.10.2021						
Mo 11.10.2021		~	-	~	Sickness	~
Tu 12.10.2021		~	Holiday End		Sickness	~
We 13.10.2021		~				~
Th 14.10.2021		~		~		
Employee	Wollert Barbara		Behn Arvid		Meier Tamara	
Fr 15.10.2021		~		▽		

The gap between 07.10.21 and 12.10.21 will be filled by the system after saving:

< 🗢 TrackEmp	loyeePresencesView			
Preview	Reset	Save	Close	
Employee	Wollert Barbara	Behn Arvid	Meier Ta	nara
Fr 01.10.2021			⇒	
Sa 02.10.2021				
Su 03.10.2021				
Mo 04.10.2021		$\overline{\nabla}$	~	~
Tu 05.10.2021		$\bigtriangledown$	$\bigtriangledown$	~
We 06.10.2021	HalfVacation	▽	Sicknes	. ⊽
Th 07.10.2021		▽ Holiday		. ⊽
Fr 08.10.2021		Holiday	$\bigtriangledown$	
Sa 09.10.2021				
Su 10.10.2021				
Mo 11.10.2021			Sicknes	. ⇒
Tu 12.10.2021			Sicknes	, ⊽
We 13.10.2021		$\bigtriangledown$	$\bigtriangledown$	
Th 14.10.2021				$\bigtriangledown$
Employee	Wollert Barbara	Behn Arvid	Meier T	
	wollert barbara	Benn Arvid	Herei	amara

## **7.3 Reporting of the Work Packages**

In the ToDo list of the TimeTracker, open work packages can be closed with the help of the "Close" button. After confirming the action, the "Actual end" field in the work package is set, the remaining effort is set to 0 hours and the degree of completion to 100%.

2   📝									
	Process number	TTJob	Project	Customer	Due time	Estimated time	Actual time	State [%]	Time to completion
1 😨 🖸	001.2-4	Create Require	Customizing	Autobau AG	12.01.2020	12	6,27		
2 😨 🖸	001.2-5	Conceptual Disc	Customizing	Autobau AG	12.01.2020	24	8		
3 😨 💆	001.2-4	Create Require	Customizing	Autobau AG	12.01.2020	12	0		
4 😨 🖸	022.2.2-2	Aufgabe mit Tic	Schnittstellen	Consult Softwar	31.08.2020	24	0		
5 😨 😋	047-1	Projektmanage	Einführung EPM	Consult Softwar	19.03.2020	20	33,5		
6 😨 🔯	047.1-1	Konzeption	Planung	Consult Softwar	11.07.2020	224	23,5		
7 😨 💆	045.1-2	Spezifikation	Planung	Consult AG	25.03.2020	38	34,5		
8 😨 😋	049-1	AP 1	Test		12.06.2020	56	14,25		

**Comments:** The work package can be reopened by users with appropriate authorization (empty actual end in work package). The next working day, the work package is automatically removed from the to-do list.

For all work packages either (as in the example) a remaining effort in hours or the degree of completion in percent can be entered. In the Completion column, you can enter the percentage at which the work package is completed in terms of content. Alternatively, in the Remainder column, you can estimate the remaining effort for these tasks in hours.

1	]   🖪	Ý									
		Process number	TTJob	Project	Customer	Due time	Estimated time	Actual time	State [%]	Time to con	npletion
1	-	001.2-4	Create Require	Customizing	Autobau AG	12.01.2020	12	6,27	0		6
2	-	001.2-5	Conceptual Disc	Customizing	Autobau AG	12.01.2020	24	8	0		15
3	2	001.2-4	Create Require	Customizing	Autobau AG	12.01.2020	12	0			
4	2	022.2.2-2	Aufgabe mit Tic	Schnittstellen	Consult Softwar	31.08.2020	24	0			
5	2	047-1	Projektmanage	Einführung EPM	Consult Softwar	19.03.2020	20	33,5			
6	2	047.1-1	Konzeption	Planung	Consult Softwar	11.07.2020	224	23,5			
7	2	045.1-2	Spezifikation	Planung	Consult AG	25.03.2020	38	34,5	100		0
	, <del>0</del> .	040.1	40.1	Test		13.07.3030	54	14.35			

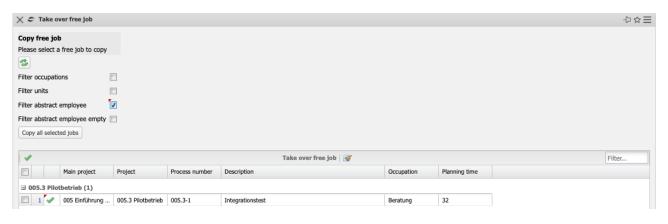
After saving the values for the estimates, the system automatically calculates and enters either the remaining duration or the POC.

#### 7.4 Free Work Packages

For tasks where the agents are not (cannot) be planned in advance, it is possible to use so-called "free work packages". These work packages can not only be used by the registered employee for time tracking, but also allow other employees to assign themselves to the work package and then record time on this work package. The action "Show free work packages" opens a dialog ...

🗙 🔯 TimeTracker Schaub Peter				-口☆ ⊟
🖹 🤹 02.08.2021 🔹 🔳	Act	ions - Filter -		
	â	Show free jobs		
		01 - Finalize last month		Filter
From To Hour	۲	02 - Finalize current	Note	
∃ Day 01: Monday, 02.08.2021 CW31	۲	Request absences		
	<u>i</u>	Time sheet (external)		
2	6	Time sheet (internal)		
3	6	Attendances and absences		
<ul> <li>4 (2)</li> <li>5 (2)</li> </ul>	6	Absences		
00:		Service report	J	
Day 02: Tuesday, 03.08.2021 CW31	<b>~</b>	<b>D</b>		
6				
7 💽				

... which displays the work packages with the "free" indicators. Various filters can also be used in the dialog. In the demo version these are "Activities" (work packages with an activity assigned to the logged in user), "Units" (work packages from projects assigned to the Unit of the logged in user) and "Abstract Employees" (all work packages assigned to employees with the status "Abstract Employees", see also section 3.7).



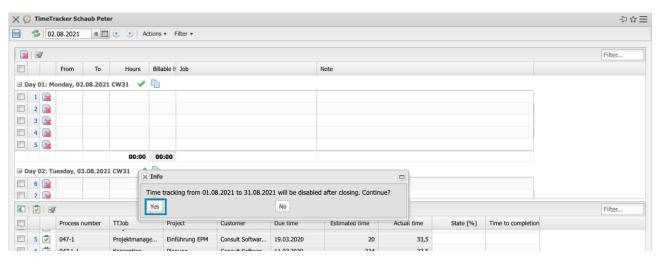
By clicking on the green tick, a work package is then selected and the work package is transferred to the employee's to-do list. You can then enter times on the work package.

## 7.5 Period-end Closing

Period-end closing for service entry is of outstanding importance for many downstream processes. The time trackings of all employees are checked periodically (usually monthly). Based on this check, the quality of some HR processes (vacation, overtime, ...), activity accounting (especially for expense projects) and controlling (monthly reportings) is ensured.

🗙 💆 TimeTracker Schaub Peter				-▷☆ ☰
🖹 🤹 02.08.2021 🔹 🔳	Acti	ions - Filter -		
Prom To Hour	۲	Show free jobs 01 - Finalize last month 02 - Finalize current	Note	Filter
Day 01: Monday, 02.08.2021 CW31	_	Request absences		
1     1       2     1       3     1       4     1       5     1       0000		Time sheet (external) Time sheet (internal) Attendances and absences Absences Service report UU:UU	Image:	
Day 02: Tuesday, 03.08.2021 CW31     6     6     7     7				
mine i 🛶				Tilter

In the example, the logged-in user has recorded his times, evaluated himself (e.g. with the "timesheets") and reports his time tracking for the current period "finished". The period is usually the month, sometimes the week and rarely the quarter. After executing and confirming the action "period end" the Time-Tracker is closed and ...



... the times of periods are read-only.

( <u>C</u>	🁌 Ti	meTr	acker Sch	aub Pete									
1	-3	-   <b>β</b> α	.09.2021	0	🔹 💌 🗛	ctions <del>+</del>	Filter •						
		*			-								
		*	From	То	Hours	Billable h	Job			Note			
	av 0	)1: Th	ursday, 3	0.09.202	1 CW39 💙	5							
-	1		09:30	12:30	03:00	03:00	001.2-4 Crea	e Requirements	Specification - 1.2	Comment 3			
1	2		13:30	18:30	05:00	05:00	001.2-5 Conc	eptual Discussion	n - 1.2 Customizing	Comment 4			
T					08:00	08:00							
		1.	*										
		]   💌		umber	TTlob	Broj	iart	Oustomer	Dustima	Estimated time	Actual time	State [%.]	Time to completion
			Process n	umber	TTJob Craate Require	Proj		Customer Autobau AG	Due time	Estimated time	Actual time	State [%]	Time to completion
	1	2		umber	TTJob Create Require Conceptual Dis	e Cus	ject tomizing tomizing	Customer Autobau AG Autobau AG	Due time 12.01.2020 12.01.2020	Estimated time 12 24	Actual time 6,27 8	State [%]	Time to completion

The system now generates reconciliations for the release of times in the period based on the configured workflow. Period-end closing is usually performed in two stages (for example, first a completeness check by the back office or team leader, then a technical check by the project manager) and less frequently in one stage.

Ballot	InitiatedWorkflows
My Ballots: 11     Show all ballots	
Travel for confirmation submit 20 Schaub Peter 378,11	
Poreign invoice line confirmation 15-1 Pos 1 2.300,00	
Poreign invoice line confirmation 10-1 pos 1 1,00	
Absence request Schaub Peter, Holiday from 06.08.2021 to 15.08.2021	
Eoreign invoice line confirmation 18-1 Pos 1 1.000,00	
Foreign invoice line confirmation 18-2 Pos 2 1.200,00	
Erreign invoice line confirmation 15-3 Pos 2 1.200,00	
Travel for confirmation submit 19 Schaub Peter Workshops 1.024,00	
Time tracking confirmation for Schaub Peter to 31.08.2021	
Time tracking confirmation for Schaub Peter to 30.09.2021	

The coordinator (in this case the team leader) then opens the voting dialog ...

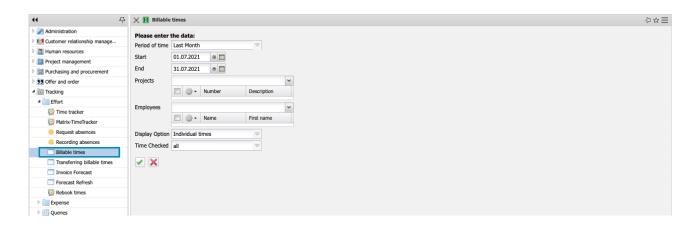
🗙 😋 Vote		☆☆	Ξ
Please vote	and give a comment		
Workflow	Time tracking confirmation		
Voting	Unitleiter		
group			
Comment			
Employee Recording lim	Schaub Peter		
Chart Vote			
Comment			
No comment	¢		
Agree Cancel			

... and can check the times of the periods with the help of reportings (here the "timesheet") to either agree or disagree. In case of rejection, a comment is often entered to inform the employee about the reason for the rejection.

## 7.6 Billable Expenses

After period-end closing, the outgoing invoices are usually created for projects with settlement type "Expense". If more or less than the actual expenses are to be invoiced for some expense projects, a valuation of the billable services can be carried out. This functionality is mainly used by project managers to prepare for invoicing.

After executing the action ...



... a dialogue opens. Here you can select the performance period, the projects and/or employees, the display option (time tracking or work package) and a check option.

In the following example every single unchecked time tracking is displayed for the project "01" for the period 01.07.2021 to 31.07.2021.

🗙 🖪 Billable	time	25			
Please enter	the	data:			
Period of time	Las	t Month		$\bigtriangledown$	
Start	01.	09.2021	◎ 🔲		
End	30.	09.2021	•		
Projects					~
		@•	Number	Description	
		1	082	Development	of
Employees					~
		۰ (	Name	First name	
Display Option	Ind	ividual t	imes	$\bigtriangledown$	
Time Checked	all			$\overline{\nabla}$	
<ul> <li>X</li> </ul>					

Among other things, the client, the project and the activity, the date of entry, the employee, the recorded time and the comment are displayed here. In the field Billable time, you can enter the billable expenses of the work package independently of the recorded time.

-	TrackAssessableT	meView							
Save	Checked								
b B	/ 🔒 🚣 🗊					Times	<b>*</b>		
	Company A	Project	Job	Date	Employee	Time	Billable time	Note	Ch
	1 ATB Autobau AG	067 Tickets	067-1 Job mit Tickets	13.08.2020	Schaub Peter	04:00	04:00		
	2 ATB Autobau AG	067 Tickets	067-1 Job mit Tickets	10.08.2020	Schaub Peter	04:00	04:00		
						08:00	08:00		

In the example, the billable times of the work packages are changed and the comment of the second work package is changed.

Time entries that have already been processed can be set to "Checked".

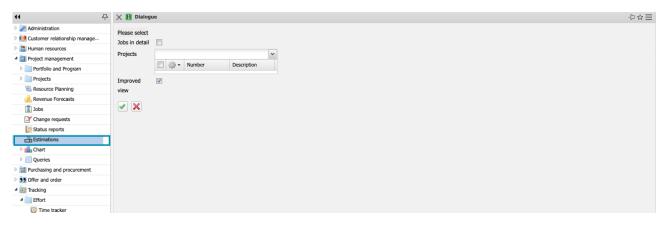
After saving, the billable times are used for further processing during invoicing.

( 0	Tr	ackAssessableTin	neView							
Save	1	Checked								
Ъ	1	🚔 🚣 📧					Times	<b>a</b>		
		Company A	Project	Job	Date	Employee	Time	Billable time	Note	Che
	1	ATB Autobau AG	067 Tickets	067-1 Job mit Tickets	13.08.2020	Schaub Peter	04:00	05:00		
	2	ATB Autobau AG	067 Tickets	067-1 Job mit Tickets	10.08.2020	Schaub Peter	04:00	03:50	Comment 1	<b></b>
_							08:00	08:50		

#### 7.7 Remaining Expenses & Percentage of Completion

For project controlling and resource management, either the percentage of completion or the remaining expenditure is required as a comparative figure. These estimates can be stored by the employee in the TimeTracker (see also Section 7.3) or in the "Estimate Completion" dialog (for example, by the project manager). In addition, degrees of completion can be stored in the project (see also the masks Project and Degree of Completion).

The "Estimations" function can be found in the "Project management" menu.



After clicking the button a dialog opens. Here the projects can be selected:

🗙 🖪 Dialogu	ie			
Please select				
Jobs in detail				
Projects				~
		Number	Description	
	1	059	Testprojekt	5
Improved	<b>V</b>			
view				
× ×				

In the next step, the planned and actual values as well as the last estimates based on the work packages can be viewed and current estimates can be stored:

( =	E	stimate progress										-[그 쇼
	2	h										
	-											
					RowsTableG							Filter
-		Project	Process	State of completion Time-To-Comp		Target time	Tracked time	Dam	Last estimation	Last Claim of some	Last Time-To-Comp	
		Project	Process	State or completion Time-To-Comp	ieuo Pianneo ume	larget ome	Tracked time	Rem	Last estimation	Last State or comp	Last Time-10-Comp	Esumation date
B P	roje	ct 059.1 planung	(2)									
	1	Project 059.1 pl	Process 059.1-1		48	0	0					13.08.2021
	2	Project 059.1 pl	Process 059.1-2		80	80	0					13.08.2021
					128	80	0				0	
B P	roje	ct 059.2 umsetzu	ng (3)									
	3	Project 059.2 u	Process 059.2-1		160	160	0					13.08.2021
	4	Project 059.2 u	Process 059.2-2		40	40	0					13.08.2021
-	5	Project 059.2 u	Process 059.2-3		16	16	0					13.08.2021
					216	216	0				0	
= P	roje	ct 059.3 Planung	(2)									
-	6	Project 059.3 Pl	Process 059.3-1		24	24	0					13.08.2021
	7	Project 059.3 Pl	Process 059.3-2		40	40	0					13.08.2021
					64	64	0				0	
= P	roje	ct 059.4 Customi	zing (3)									
	8	Project 059.4 C	Process 059.4-1		8	8	0					13.08.2021
	9	Project 059.4 C	Process 059.4-2		72	72	0					13.08.2021
	10	Project 059.4 C	Process 059.4-3		16	16	0					13.08.2021
					96	96	0				0	

In the example, a percentage of completion of 20% is entered for one work package and a remaining time of 12 hours for the one below:

	2	Project 059.1 pl	Process 059.1-2		
	roie	ct 059.2 umsetzu	ng (3)		
	3	Project 059.2 u	Process 059.2-1		
	-				
	4		Process 059.2-2		
	5	Project 059.2 u	Process 059.2-3		
∃ P	roje	ct 059.3 Planung	(2)		
<b>F</b>	6	Project 059.3 Pl	Process 059.3-1		
	7	Project 059.3 Pl	Process 059.3-2		
3 P	roje	ct 059.4 Customiz	ing (3)		
B P	roje 8	ct 059.4 Customiz Project 059.4 C	ing (3) Process 059.4-1		
3 P			Process 059.4-1	20	
B P	8	Project 059.4 C	Process 059.4-1	20	14
= P	8 9	Project 059.4 C Project 059.4 C	Process 059.4-1 Process 059.4-2	20	14
	8 9 10	Project 059.4 C Project 059.4 C	Process 059.4-1 Process 059.4-2 Process 059.4-3	20	14
	8 9 10	Project 059.4 C Project 059.4 C Project 059.4 C	Process 059.4-1 Process 059.4-2 Process 059.4-3	20	12

The system calculates the percentage of completion on the basis of the actual expenditure (the planned expenditure is not important in the forecast) from the remaining expenditure and vice versa.

#### imes arepsilon Estimate progress 🖹 🔧 h $\bigtriangledown$ RowsTableGrid State of completion Time-To-Completion Planned time Target time Tracked time Remove Last estimation Last State of compl Last Time-To-Comp Estimation date Project Process ∃ Project 059.1 planung (2) I Project 059.1 pl... Process 059.1-1... 48 0 0 01.10.2021 2 Project 059.1 pl... Process 059.1-2... 80 80 0 01.10.2021 128 80 0 Project 059.2 umsetzung (3) 3 Project 059.2 u... Process 059.2-1... 160 160 0 01.10.2021 Project 059.2 u... Process 059.2-2... 40 40 0 01.10.2021 5 Project 059.2 u... Process 059.2-3... 16 16 0 01.10.2021 216 216 0 ∃ Project 059.3 Planung (2) 6 Project 059.3 Pl... Process 059.3-1... 24 0 01.10.2021 24 Project 059.3 Pl... Process 059.3-2... 01.10.2021 40 40 0 64 64 0 0 Project 059.4 Customizing (3) 8 Project 059.4 C... Process 059.4-1... 01.10.2021 8 8 0 9 Project 059.4 C... Process 059.4-2... 72 01.10.2021 20,00 01.10.2021 72 0 0 Topie 10 Project 059.4 C... Process 059.4-3... 12 01.10.2021 16 16 0 01.10.2021 0,00 96 96 0 12 56 56 0 0

The degree of completion can also be entered directly in the project on the "Status" tab for the entire project or individual sub-projects:

🖹 署 🛛	🗕 🖪 🗹 🗟	V	-0 -	ent≠ Edit∓ Vie	1	1					
eneral data	Stakeholders	Proposal Po	ortfolio Risk a	ssessment Stat	tus Key figures	Calculation	Billing documents	Order data	Logbook	Final Report	Misc
- Status re	eport										
Status Repo	rt	Reporting	g period		$\bigtriangledown$						
Status repo	ts										
🖻 🏟 •	Report date 🛎	Next report date	Created by	Overall status	Status deadlines	Status costs	Status quality	Estimated project	Note		
۲	01.10.2021 13:12		Schaub Peter	1	1	1	1	21.07.2020			
•	Description	Date * 01.10.2021	Created by Schaub Peter	Status registered	Reason	Priority	Note				
⊡ Estimate Estimates	15										
E @•	Report date 🛥	Completion	Estimated ren	naining effort Em	ployee Note	2					
1	01.10.2021	10,00 %		Sch	naub Peter						
Degree of C	ompletion	25									
🗆 Risks —											
E	Name	Description	Risk type	Group	Risk managers						
		1	1								

This percentage of completion in the project is often used for the valuation of unfinished services.

## 7.8 Risks

Risk management is a management task in which the risks of an organization or projects are identified, analyzed and evaluated. To this end, the organisation's overall objectives, strategies and policy for risk management must be defined.

In Projectile there are different possibilities to manage risks. The simplest way is risk assessment in form of an evaluated checklist in the project on the tab "Risk Assessment". The risk assessment shown is an implementation example and differs in many versions. The risks are categorized (here into customer risks, economic risks, resource risks and implementation risks) and often include point systems.

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General data Stakeholders Proposal P	Risk assessment	Status Key figures	Calculation Billing documents	Order data Logbo	k Final Report	Misc	
E Summary							
Key figure risks 13							
Customer risks							
Key figure customer risks	4						
Customer has enough knowhow to support the p	roject 1	$\overline{\nabla}$					
Result of the project is very important for the cus	tomer 2	$\bigtriangledown$					
Project requires no organisational changes at the	1	$\overline{\sim}$					
customer							
Economic risks							
Key figure economics risks	9						
Risks are covered by the calculation	1	$\bigtriangledown$					
Project will be offered on a Time & Material basis	3	$\bigtriangledown$					
Offer is based on General Terms & Conditions	4	-					
Cost estimation is very reliable	1	~					
cost countation is very reader	1						
⊟ Resource risks							
Key figure resource risks		0					
Project tasks has been completed successfully se	veral times before	~					
Project team will be completely available		▽					

The risk assessment is often updated as part of the status report (see Section 7.9). Another option for managing risks is the flexible investment of any risks and their assessments:

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General data	Stakeh	olders	Proposal	Portfolio	Risk assessmer	t Statu	IS Key	figures	Calculation	Billing docu	uments	Order data	Logbook	Final Report Mis	c			
E Custome	r actions																	
+ Meetings																		
* Decision	5																	
Risks																		
🖻 🎲 •	No.		Ratin	g Descript	ion Impact	o Impact	Impact o	Impact o	Impact	Probability F	Risk key	changes / progres	Action	Responsible	Date due	Status	Comment	
1	1			2 Risk 1	2	1	1	6	10,00	20,00 %	2,00				01.02.2020			
۲	3																	
E External Project acceptance			5.pdf 19.04.2	020 Schaub	Peter													
Documentati	ons																	
Invoices																		

Here, risks are defined line by line and the assessments are carried out in the form of a points system.

The last possibility to manage risks is the module "Risk Management". Any number of risks can be defined here and assigned to programs, portfolios, units and projects. In the example, two risks have been assigned for the project:

Project 022 Einführung	Fibu										⊕☆≡
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eneral data Stakeholder	Proposal	ortfolio 🗍 Risk as	sessment Statu	IS Key figures	Calculation	Billing documents	Order data	Logbook	Final Report	Misc	
E Status report Status Report Status reports		g period		⊽							
📄 🎲 🔹 Report date 🍝	Next report date	Created by	Overall status	Status deadlines	Status costs	Status quality	Estimated project	< Note			
1 14.01.2020 15:03	03.02.2020 00:00	Schaub Peter	2	3	1	1	02.03.2020				
2 13.02.2020 10:16		Schaub Peter	2	2	1	3	16.03.2020				
<ul> <li>01.10.2021 11:09</li> </ul>		Schaub Peter	1	1	1	1	05.09.2020				
- Change requests	Date *	Created by	Status	Reason	Priority	Note					
		Schaub Peter	registered								

The risks consist of own administration masks, in which ...

🗙 ᆕ Project	risk 022 Einführung Fil	ou 15.01.2020				⊕☆≡
🗎 🖹 🟯	Document + Edit + V	ew •				
– ⊟ Basic inf	ormation					
No.	1			Status	▽	
Description	Risk 1					
Created by	Schaub Peter			Date	15.01.2020 🛛	
Project	022 Einführung Fibu			Responsible	▽	
Date due	01.02.2020 🛛 🗐			Rating	2	
- E Impact -						
Impact on Q	2	к	1	т	1 Z 6	
Impact		Probability	20,00 %	Risk key	2,00	
				figure		
⊟ Changes						_
Action						
- E Commen	t					_

... the allocations to programmes, portfolios, units and projects are defined and the risk indicators (risk contributions) and risk reports are managed Any number of countermeasures can be assigned to the risk indicators and these in turn can be assigned to the work packages.

#### 7.9 Status Report and Change Request

The status reports are an important part of project management and project controlling. They document the progress of the project plan. It is clearly visible

who is working on what, how far the task has progressed, or what problems may arise.

The status reports can be created on the "Status" tab:

Project	t 022 Einführung F	ibu										-12 ☆ Ξ
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eneral data	Stakeholders	Proposal Po	rtfolio 🗌 Risk a	ssessment State	IS Key figures	Calculation	Billing documents	Order data	Logbook	Final Report	Misc	
⊡ Status re Status Repo Status repor	rt		period		⊽							
E @•	Report date -	Next report date	Created by	Overall status	Status deadlines	Status costs	Status quality	Estimated project	e Note			
1	14.01.2020 15:03	03.02.2020 00:00	Schaub Peter	2	3	1	1	02.03.2020				
2	13.02.2020 10:16		Schaub Peter	2	2	1	3	16.03.2020				
۲	01.10.2021 11:09		Schaub Peter	1	1	1	1	05.09.2020				
Change requests     Created by     Status     Reason     Priority     Note												
E @•	Description	Date *	Created by	Status	Reason	Priority	Note					
۲		01.10.2021	Schaub Peter	registered								

The status report often contains status information regarding deadlines, costs and quality (sometimes more), justifications, progress information (expected project end, remaining costs, ...)

🗙 [ Status report 022.1 0	22 Einführung Fibu 14.01.2020 15	03:24	₽☆≡
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General data Comments	Risk assessment		
⊟ Basic information			
Number	022.1		
Project	022 Einführung Fibu		
Reporting period From	14.01.2020 💿 🔲 00:	00 To 0 I	
Created by	Schaub Peter	Report 14.01.2020 15:03 Next report 03.02.2020 O I O0:00	
		date date	
Estimated project	02.03.2020 💿 🗖		
end			
Note			
Current report			
— ⊡ Status			
Status deadlines	3	Customer accepts postponement	
Status costs	2	15% above plan	
Status quality	1 5		
RessourceState	0		
Overall status	2		
Remaining internal effort	1.232,00 EUR		
Remaining external effort	542,00 EUR		

... and, if necessary, the risk assessment:

🗙 [ Status report 022.1 022 Einführung Fibu 1	.01.2020 15:03:24	⊕☆≡
🗎 🙀 🛓 🚔 Document + Edit + View +	Actions •	
General data Comments Risk assessment		
E Summary		
Key figure risks 12		
─ ⊡ Customer risks		
Key figure customer risks		
	10	
Customer has enough knowhow to support the p	oject 3 🗢	
Result of the project is very important for the cus	omer 3 I	
Project requires no organisational changes at the	4	
customer		
Economic risks		
Key figure economics risks	2	
Risks are covered by the calculation	2 👳	
Project will be offered on a Time & Material	□	
basis		
Offer is based on General Terms & Conditions	□	
Cost estimation is very reliable	▼	
□ E Resource risks		
Key figure resource risks	0	
Project tasks has been completed successfully se	eral times before	
Project team will be completely available	<b>a</b>	

In project change management, a change request is a formalized request to change the properties of a specific product feature. Each change request should be evaluated, decided and communicated in a controlled process.

Change requests can be created on the "Status" tab:

	Project 022 Einführung Fibu											
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ener	ral data	Stakeholders	Proposal	ortfolio 🗍 Ris	k assessment S	atus Key figures	Calculation	Billing documents	Order data	Logbook	Final Report	Misc
- s	tatus n	eport										
Statu	us Repo	ort	Reportin     Reportin	g period		~						
Statu	us repo	rts										
	- tij	Report date +	Next report date	Created by	Overall status	Status deadlines	Status costs	Status quality	Estimated project	e Note		
	1	14.01.2020 15:03	03.02.2020 00:00	Schaub Peter	2	3	2	1	02.03.2020	)		
	2	13.02.2020 10:16		Schaub Peter	2	2	1	3	16.03.2020	1		
۲		01.10.2021 11:17		Schaub Peter	1	1	1	1	05.09.2020	)		
ΞC	hange	requests										
	(j) =	Description	Date **	Created by	Status	Reason	Priority	Note				
	1	Change 711	01.10.2021	Schaub Peter	registered	Customer request	3 - normal prior	-				
	2	Change 611	01.10.2021	Schaub Peter	registered	Technical	5 - highest prio					
۲			01.10.2021	Schaub Peter	registered							

The change request often includes the participants/responsibles, the priority, a categorization and ...

🤇 📝 Ch	ange	request 022-1	Change 711				中众
	2	Document + E	idit + View +				
General o	data	Effects					
🗆 🗆 Basi	ic info	ormation					
Number	r [	022-1				Status registered 🗢	
Descript	tion	Change 711					
Project		022 Einführun	g Fibu				
Created	l by	Schaub Peter		$\overline{\nabla}$		Date of 01.10.2021	
						reation	
Categor	<b>y</b> [	Customer requ	iest	$\bigtriangledown$		Priority 3 - normal priority 🗢	
Note							
		es involved					
		First name	Name -	Work phone	Mobile number	imail Address	
		Gabi	Maier				
		Jana	Meier				
	3	Olivia	Raber	-22		livia.raber@te	

... the effects of the change in detail (effort, costs, turnover, deadline, resources, target).

X 🕑 Change request 022-1 Change 711	-⇔ ☆ ⊟
😑 🗽 🏝 Document + Edt + View +	
General data Effects	
F Effort	
Yes 🕐 Reason	
Difference 24:00 3,000 Pd	
⊢ ∃ Costs	
Ves V Reason	
Difference 1.800,00 EUR	
E Turnover Yes IV Reason Seperate Billing	
Difference 2.800,00 EUR	
E Deadlines Yes I Reason	
Ressource	
Yes 🗷 Reason Other Developers	
r = ⊂ Gals	
Yes Reason	