Projectile
Version 5.9

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

# Help, Part 7: Time Tracking, Reporting

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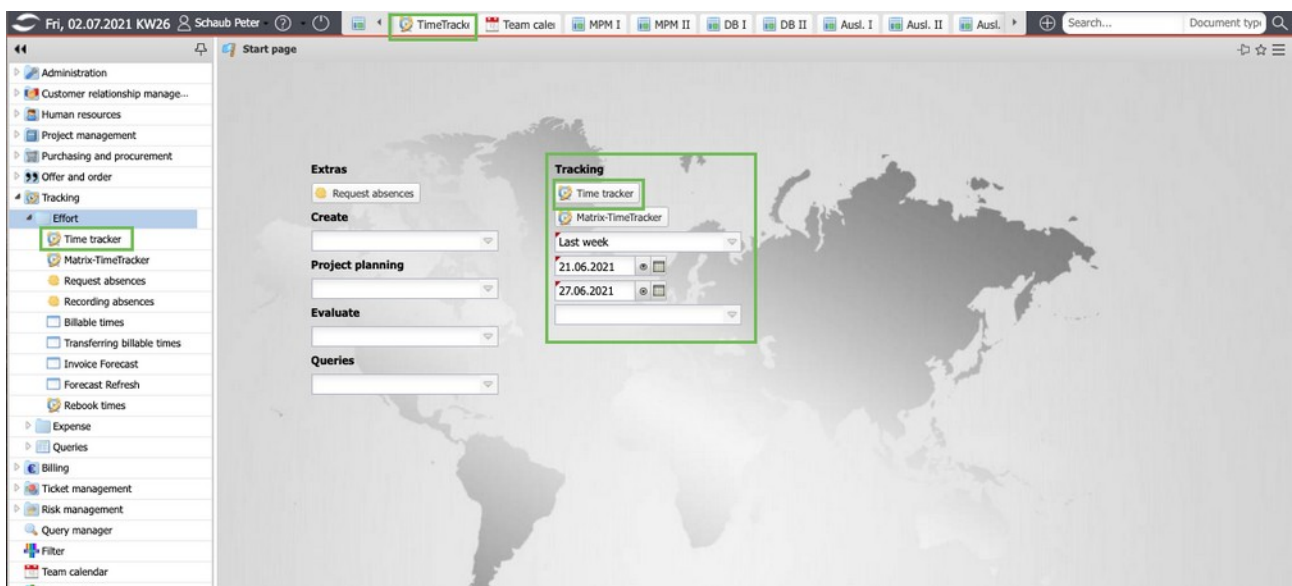
The TimeTracker consists of two parts: The upper part ("TimeSheet") is used to record project activities, working hours and absences and also contains the date selection. The lower part ("ToDo list") is used, among other things, to record activities on work packages using a stopwatch functionality (red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

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.
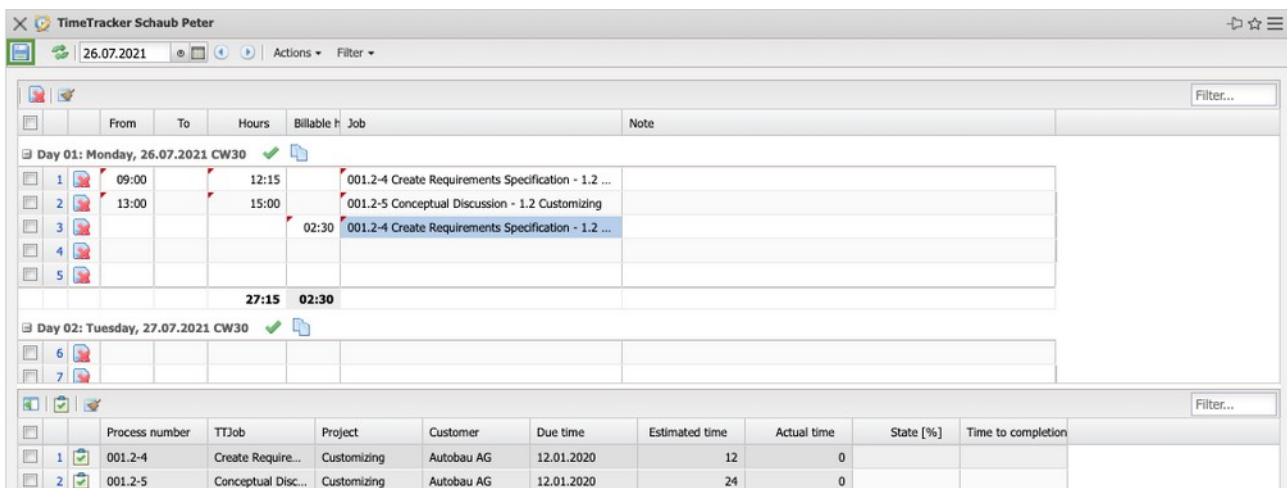

The TimeTracker can also be used to record times after. With the help of the date selection the day of the tracking can be changed. In the example below you want to record times for the previous day. The function "previous" in the date element ...
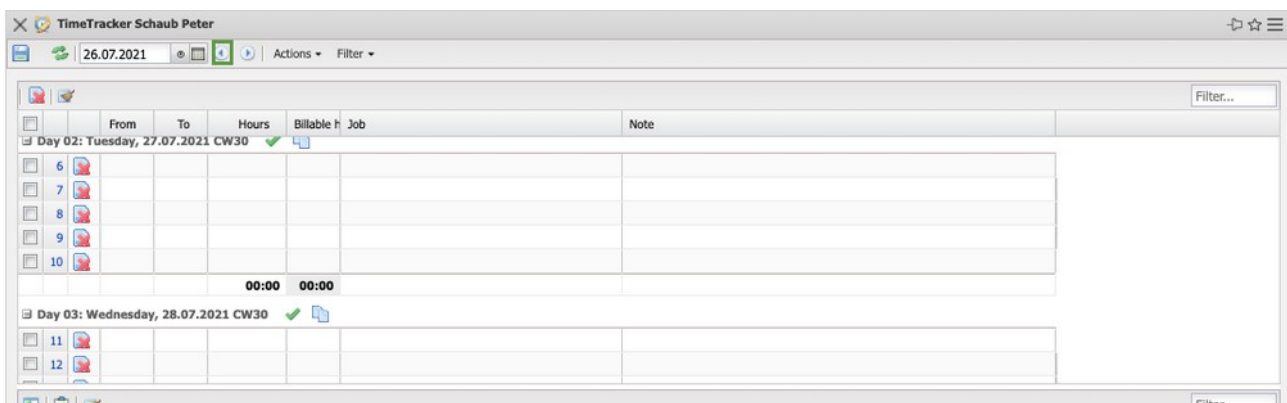

... changes the entry date and the subsequent entry of times can be carried out.

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".
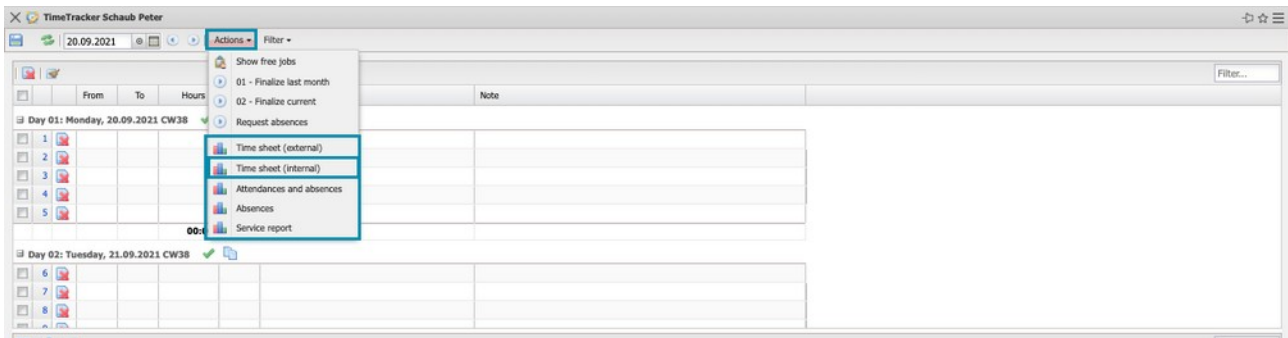
In the TimeTracker, every employee can generate reportings for himself and a freely definable period of time. In the example the reporting "timesheet" is called up for the entered period and executed with "Ok".
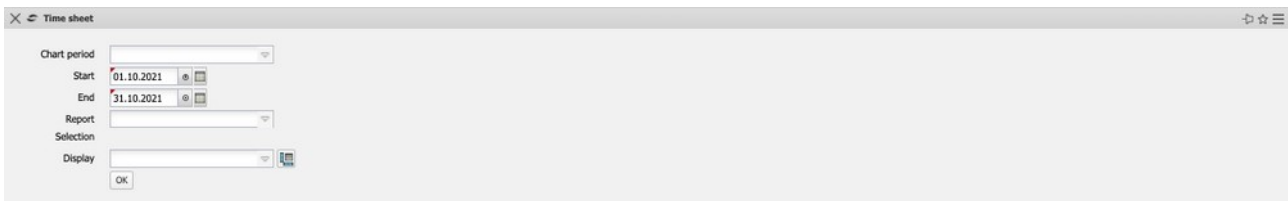
This reporting provides an overview of the project activities and working times of employees in the selected time interval. The project activities are based on the data entered in the TimeTracker for the employees' work packages. The working time data is either entered as "come-to-work" or can be automatically 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, Peter Personnel Number = 003

Date Total	Weekday Total	Times Total	Eintrag Total	Sollzeit Total	Istzeit Total	Differenz Total	Externe Bemerkung Total	Interne Bemerkung Total
01.09.2021	Wed			8,00	0,00	-8,00		
02.09.2021	Thu			8,00	0,00	-8,00		
03.09.2021	Fri			6,00	0,00	-6,00		
04.09.2021	Sat			0,00	0,00	0,00		
05.09.2021	Sun			0,00	0,00	0,00		
06.09.2021	Mon			8,00	0,00	-8,00		
07.09.2021	Tue			8,00	0,00	-8,00		
08.09.2021	Wed			8,00	0,00	-8,00		
09.09.2021	Thu			8,00	0,00	-8,00		
10.09.2021	Fri			6,00	0,00	-6,00		
11.09.2021	Sat			0,00	0,00	0,00		
12.09.2021	Sun			0,00	0,00	0,00		
13.09.2021	Mon			8,00	0,00	-8,00		
14.09.2021	Tue			8,00	0,00	-8,00		
15.09.2021	Wed			8,00	0,00	-8,00		
16.09.2021	Thu			8,00	0,00	-8,00		
17.09.2021	Fri			6,00	0,00	-6,00		
18.09.2021	Sat			0,00	0,00	0,00		
19.09.2021	Sun			0,00	0,00	0,00		
20.09.2021	Mon			8,00	0,00	-8,00		
21.09.2021	Tue			8,00	0,00	-8,00		
22.09.2021	Wed			8,00	0,00	-8,00		
23.09.2021	Thu			8,00	0,00	-8,00		
24.09.2021	Fri			6,00	0,00	-6,00		
25.09.2021	Sat			0,00	0,00	0,00		
26.09.2021	Sun			0,00	0,00	0,00		
27.09.2021	Mon			8,00	0,00	-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	Fri			6,00	0,00	-6,00		
Total				174,00	0,00	-174,00		

Chart for interval:	01.09.2021 - 01.10.2021
Planned time [h]	174,00
Tracked time [h]	0,00
Balance	-174,00
Vacation taken	0,00 (h)
	0,00 Day(s)

The reporting "time statements" …

EmployeeOccupation

Description	Job	Employee	Occupation	Ist-Beginn	Ist-Ende	Actual [h]
Entwicklung Modul B0	001.1-1 Konzeption	Schaub Peter	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	Support	10.12.2019	08.01.2020	14,00
Einführung Projectile	014.1-1 Konzeption	Schaub Peter	Beratung	05.12.2019	28.02.2020	19,00
Entwicklung Modul J	019-1 Testfälle definieren	Schaub Peter	Interne Tätigkeit	11.12.2019	30.03.2020	16,50
Entwicklung Modul J	019-2 019-2	Schaub Peter	Interne Tätigkeit	11.12.2019	12.12.2019	2,00
Einführung EPM	043.1-1 Konzeption	Schaub Peter	Beratung	25.02.2020	25.02.2020	4,00
Einführung EPM	043.1-2 Spezifikation	Schaub Peter	Beratung	24.02.2020	25.02.2020	7,00
Einführung EPM	045.1-2 Spezifikation	Schaub Peter	Beratung	10.03.2020	30.03.2020	11,75
Einführung EPM	047-1 Projektmanagement	Schaub Peter	Project Management	11.02.2020	24.03.2020	15,00
Einführung EPM	047.1-1 Konzeption	Schaub Peter	Beratung	11.02.2020	13.02.2020	4,50
Test - PD	048-1 AP	Schaub Peter	Beratung - Senior	23.03.2020	24.03.2020	11,00
						220,00

Einzelnachweise

Date	Time	Project	Job	Occupation	Employee	TTComment
02.12.2019	4,00	001.1 Planung	001.1-1 Konzeption	Beratung	Schaub Peter	Bemerkung 1
02.12.2019	4,00	002.1 Konzeption	002.1-3 Pflichtenheft	Beratung	Schaub Peter	Bemerkung 2
03.12.2019	3,75	001.1 Planung	001.1-1 Konzeption	Beratung	Schaub Peter	Bemerkung 3
03.12.2019	5,25	002.1 Konzeption	002.1-3 Pflichtenheft	Beratung	Schaub Peter	Bemerkung 4
04.12.2019	4,00	001.1 Planung	001.1-1 Konzeption	Beratung	Schaub Peter	Bemerkung 5
04.12.2019	3,00	002.1 Konzeption	002.1-3 Pflichtenheft	Beratung	Schaub Peter	Bemerkung 6
05.12.2019	4,00	001.1 Planung	001.1-1 Konzeption	Beratung	Schaub Peter	Bemerkung 5

... 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).

Acquisition on this task is stopped when …

... 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) ...
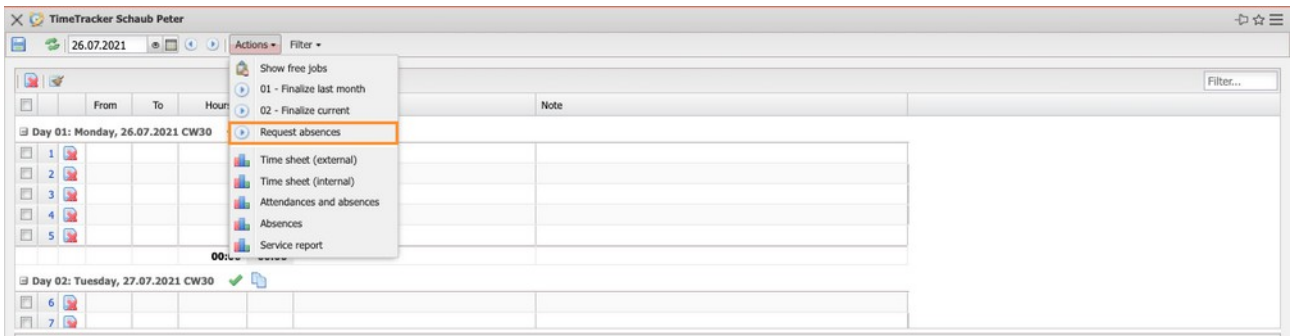
... a dialogue opens for the request for leave. Here, the user can request absences (time off in lieu, rest leave and special leave) and cancel requested or approved absences. In the following example ...
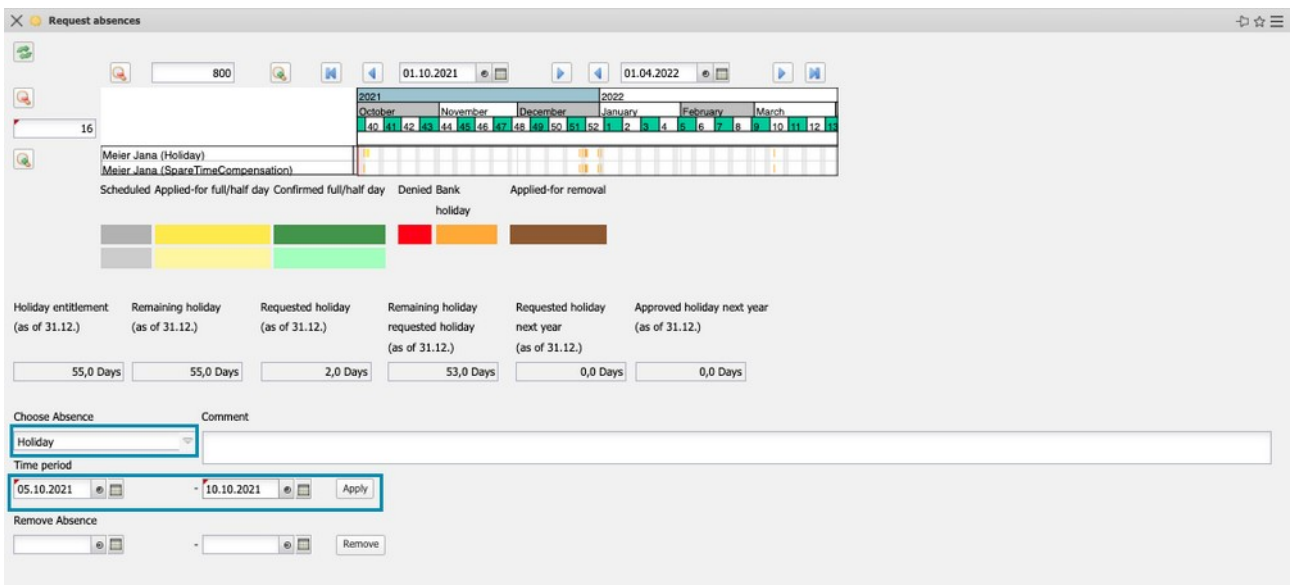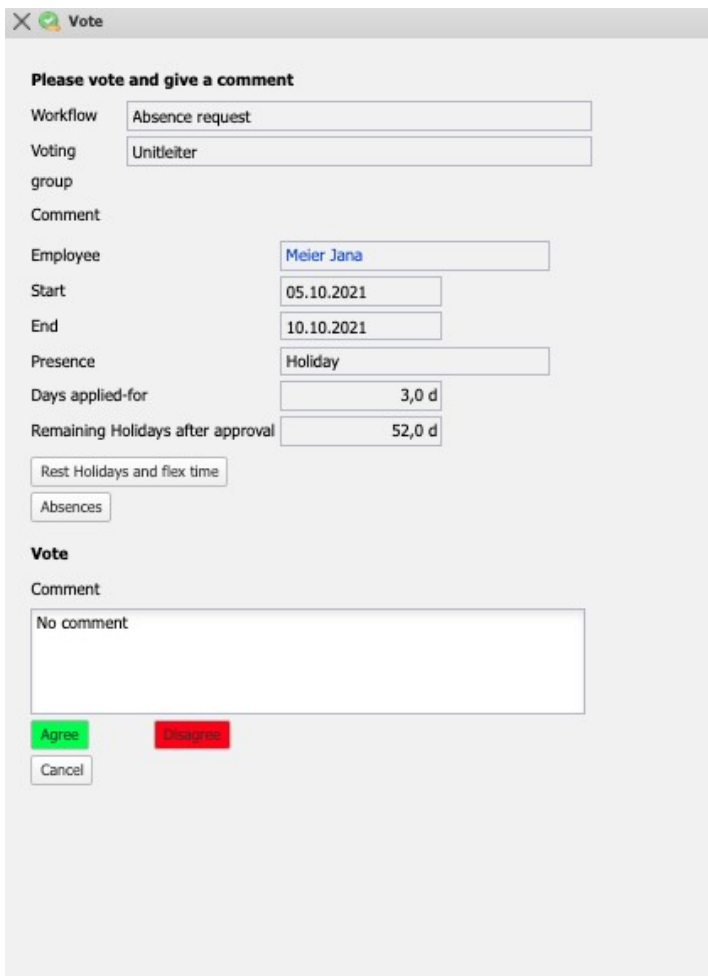
… the registered user requests leave from 05.10.2021 to 10.10.2021. After confirming the request, the requested leave is visualized in the voting dialog and the superior defined in the workflow (manager, personnel, project manager, team leader, ...) receives an internal notification ("messages"). In the example the team leader of the applicant is informed and receives a vote.
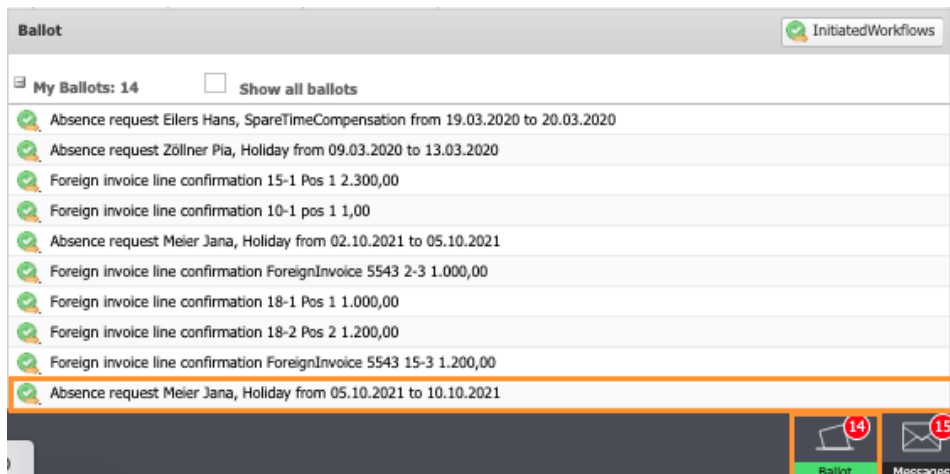
In the menu item "Reconciliation" in the dock bar the reconciliation can be opened and the vacation can be approved or rejected.

Depending on the reconciliation result, the leave is graphically displayed in the TimeTracker's leave request as leave or rejected leave:
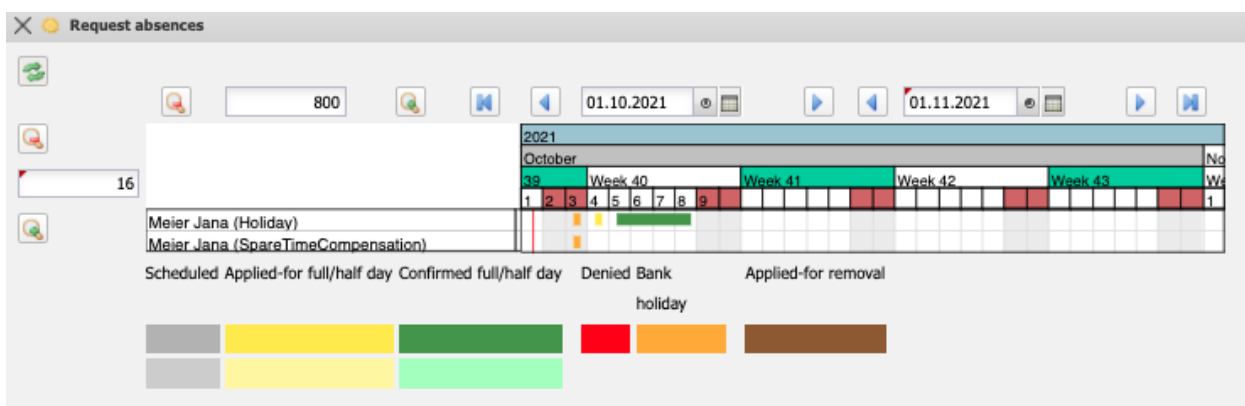
After successful reconciliation, the absence (in this case vacation) is automatically entered in the system and no longer needs to be recorded.

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.
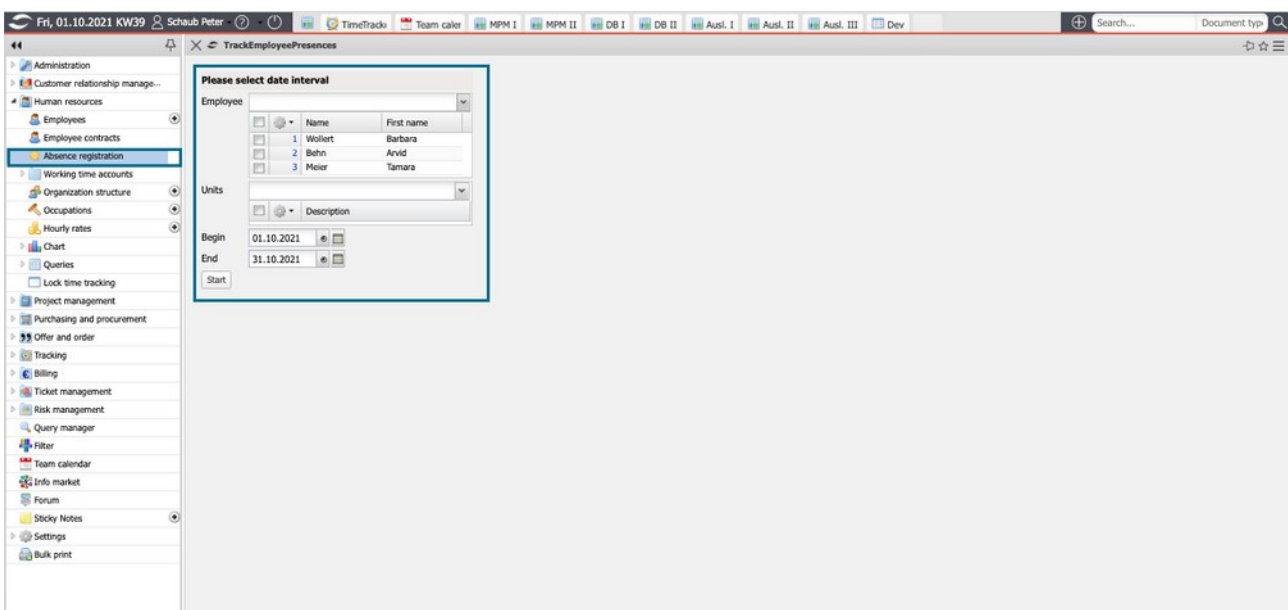
The selection boxes contain the absences defined by the administrator and sometimes "*end" entries. The "*end" entries can be used for longer absences and "delete" is used to delete existing entries.
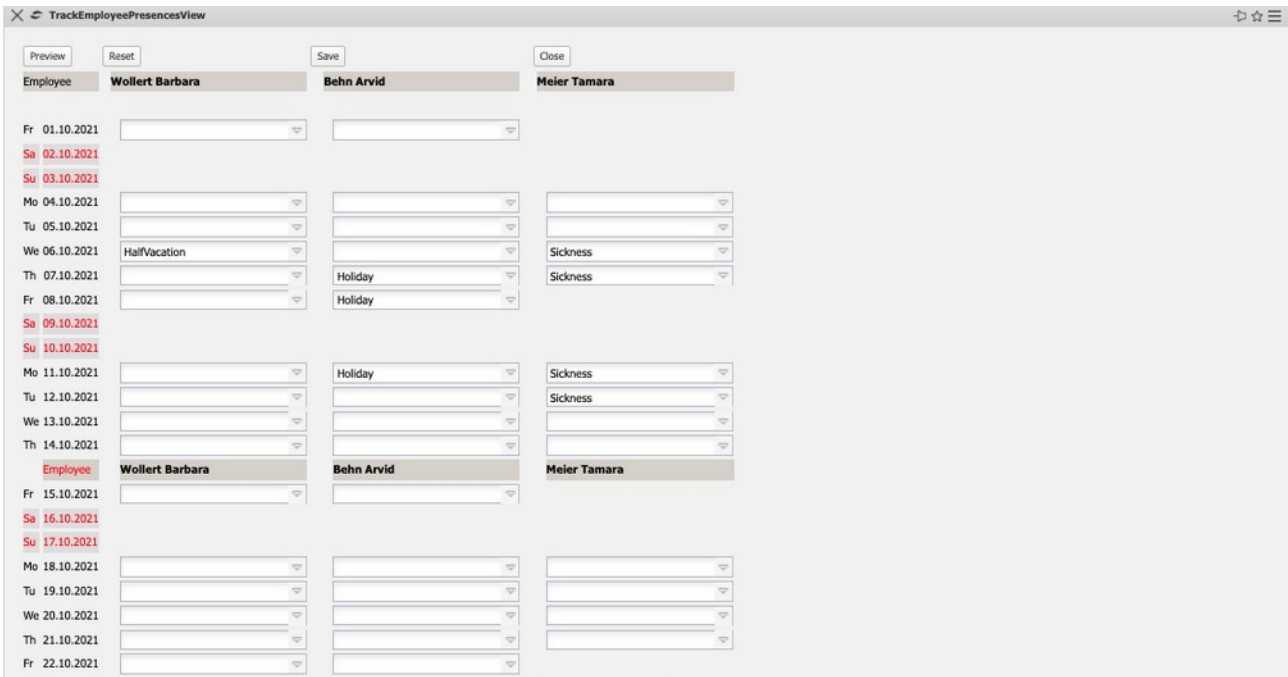
In the example, "Half Vacation" is entered for the employee Wollert on 06.10.2021 and for Behn between 07.10.2021 and 12.10.2021 and saved in the database with "Save":
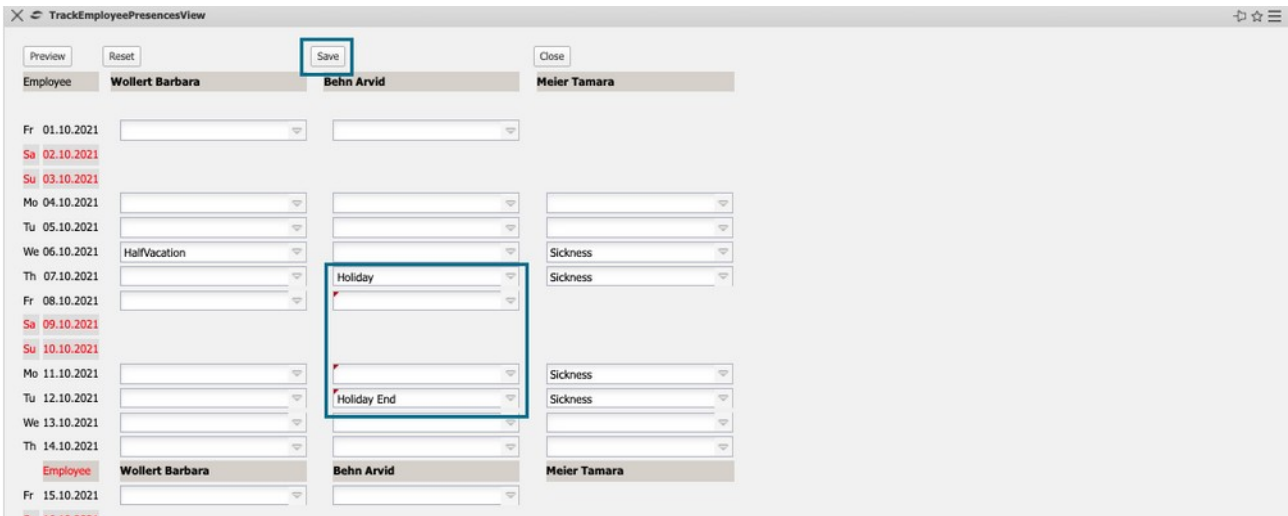
The gap between 07.10.21 and 12.10.21 will be filled by the system after saving:

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%.

			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.

			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	0	6
	2		001.2-5	Conceptual Disc...	Customizing	Autobau AG	12.01.2020	24	8	0	15
	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	100	0
	8		049-1	AP 1	Test		12.06.2020	56	14,25		

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 ...
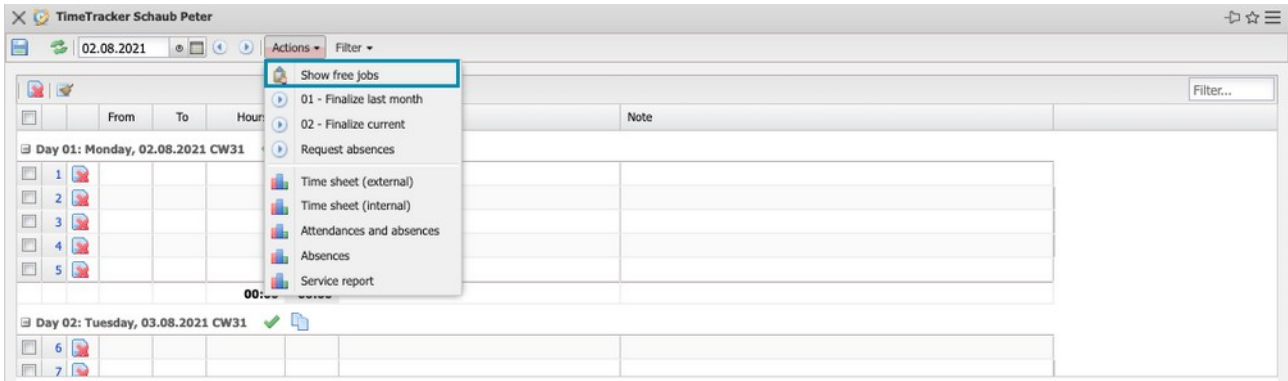
... which displays the work packages with the "free" indicators. Various filters can also be used in the dialog. In the demo version these are "Activities" (work packages with an activity assigned to the logged in user), "Units" (work packages from projects assigned to the Unit of the logged in user) 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.
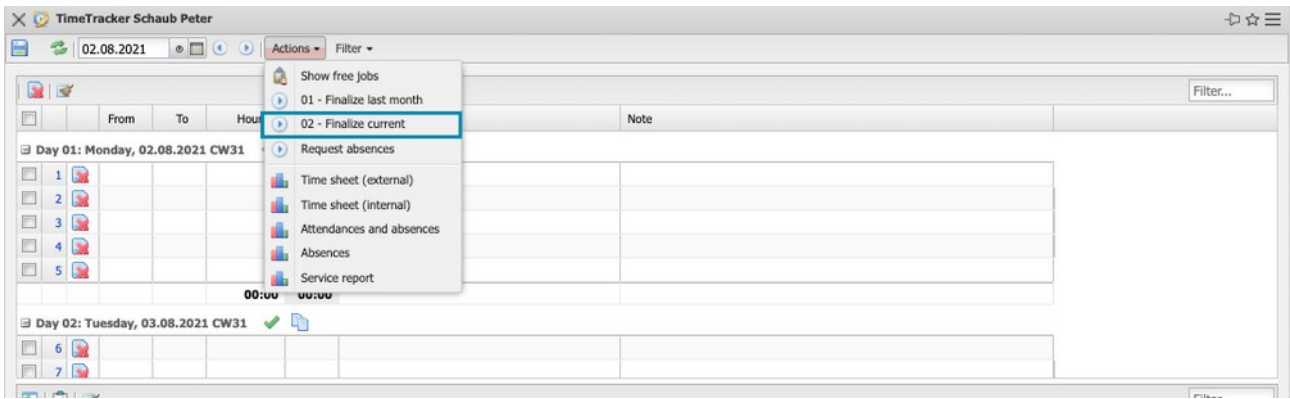
In the example, the logged-in user has recorded his times, evaluated himself (e.g. with the "timesheets") and reports his time tracking for the current period "finished". The period is usually the month, sometimes the week and rarely the quarter. After executing and confirming the action "period end" the Time-Tracker is closed and …
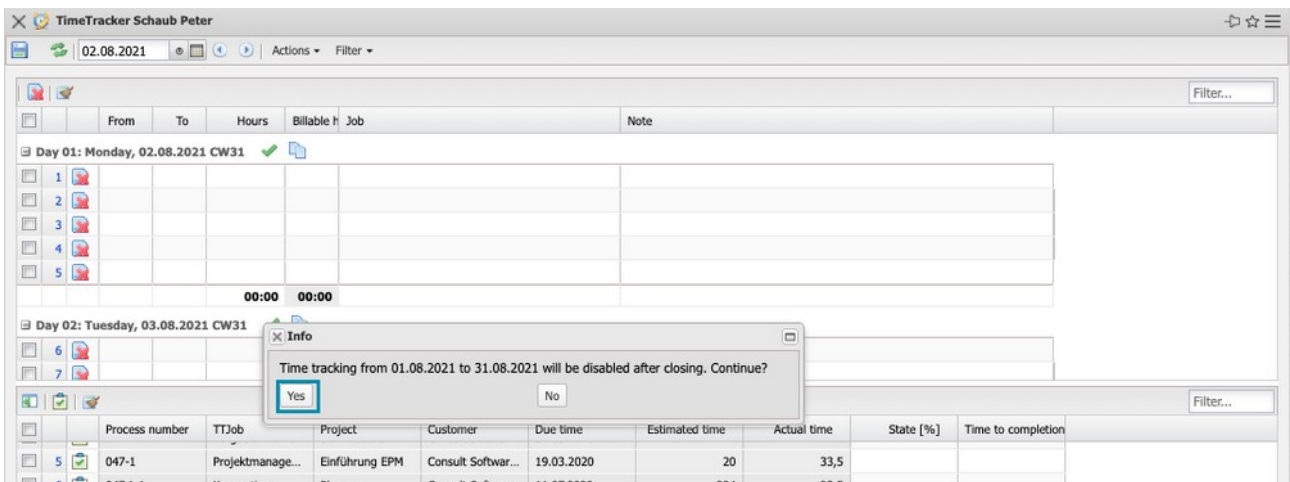
... the times of periods are read-only.

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.

The coordinator (in this case the team leader) then opens the voting dialog …
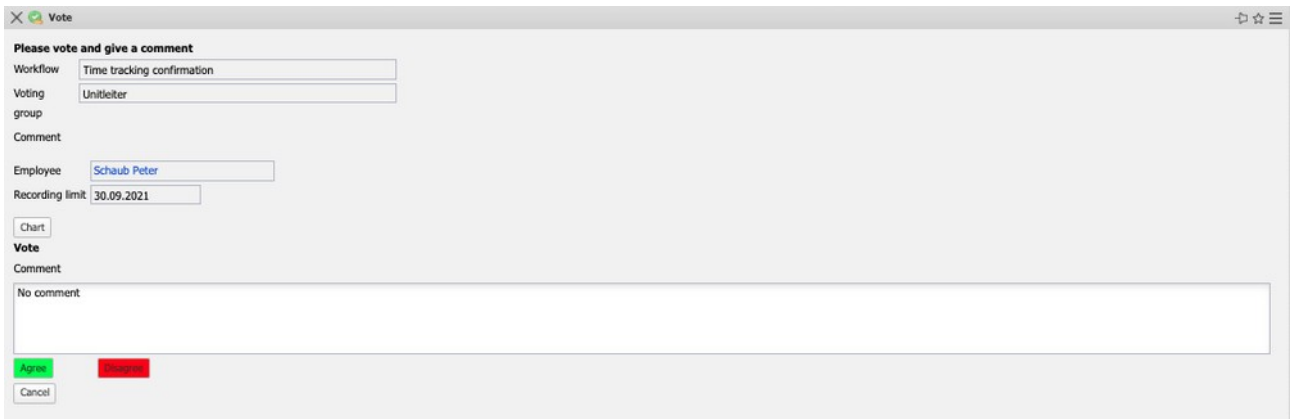
... and can check the times of the periods with the help of reportings (here the "timesheet") to either agree or disagree. In case of rejection, a comment is often entered to inform the employee about the reason for the rejection.

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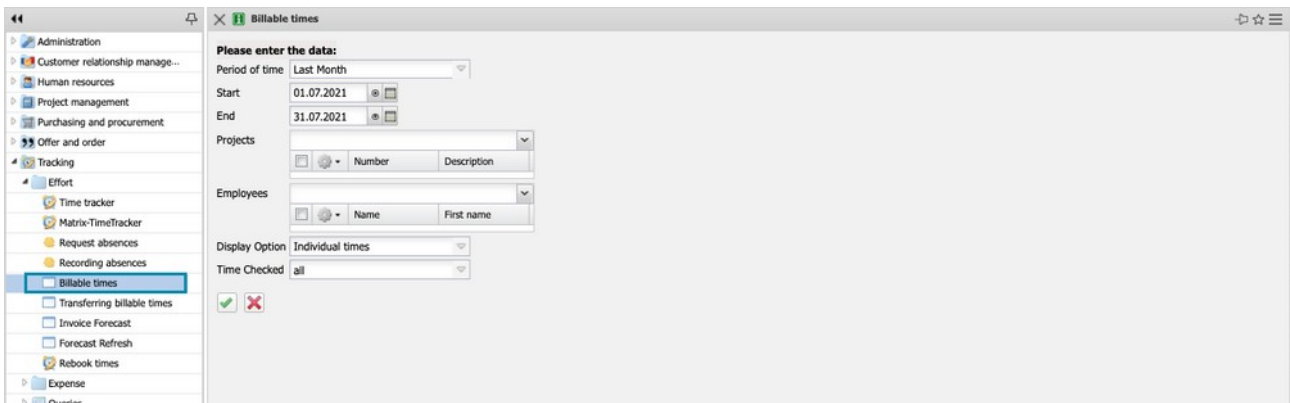
... a dialogue opens. Here you can select the performance period, the projects and/or employees, the display option (time tracking or work package) and a check option.

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.

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.

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.

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.
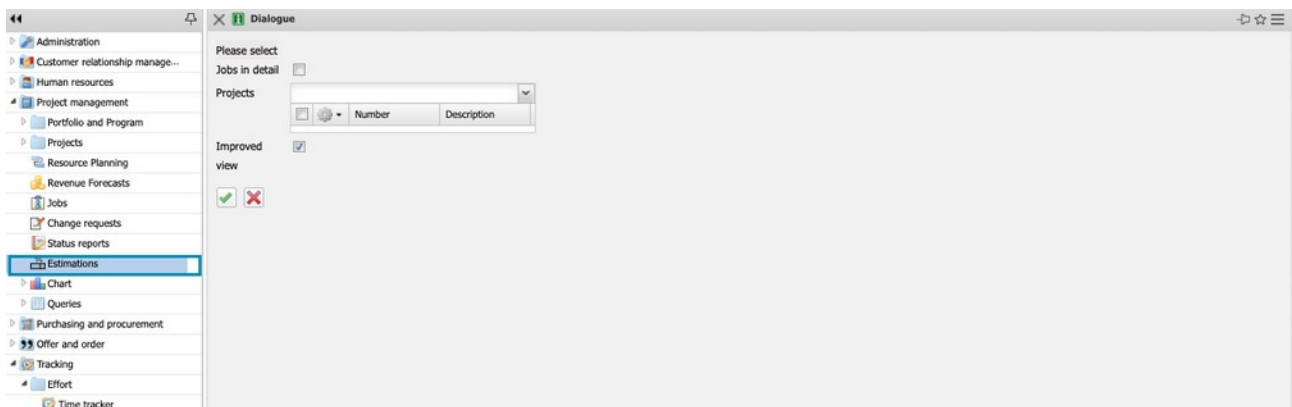
After clicking the button a dialog opens. Here the projects can be selected:
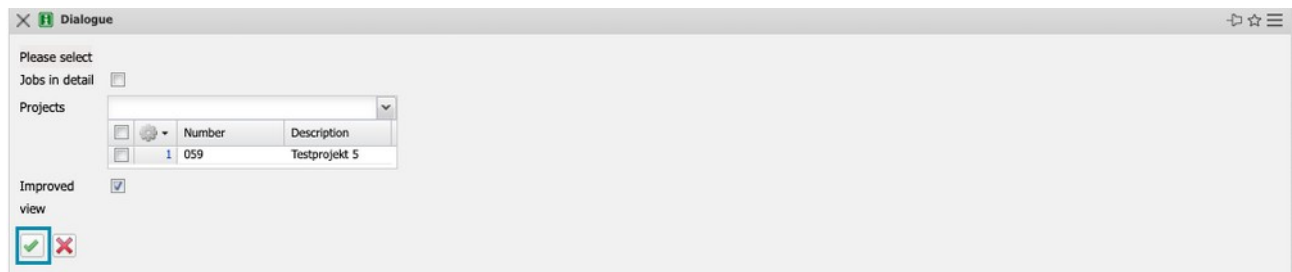
In the next step, the planned and actual values as well as the last estimates based on the work packages can be viewed and current estimates can be stored:

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:

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.

		Project	Process	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 059.1 planung (2)													
☐	1	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				0	
☐ Project 059.2 umsetzung (3)													
☐	3	Project 059.2 u...	Process 059.2-1...			160	160	0	☐				01.10.2021
☐	4	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				0	
☐ Project 059.3 Planung (2)													
☐	6	Project 059.3 Pl...	Process 059.3-1...			24	24	0	☐				01.10.2021
☐	7	Project 059.3 Pl...	Process 059.3-2...			40	40	0	☐				01.10.2021
						64	64	0				0	
☐ Project 059.4 Customizing (3)													
☐	8	Project 059.4 C...	Process 059.4-1...			8	8	0	☐				01.10.2021
☐	9	Project 059.4 C...	Process 059.4-2...			72	72	0	☐	01.10.2021	20,00	0	01.10.2021
☐	10	Project 059.4 C...	Process 059.4-3...			16	16	0	☐	01.10.2021	0,00	12	01.10.2021
						96	96	0				12	
☐ Project 059.5 Pilotbetrieb (2)													
						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:

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.

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:

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:

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

... 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.
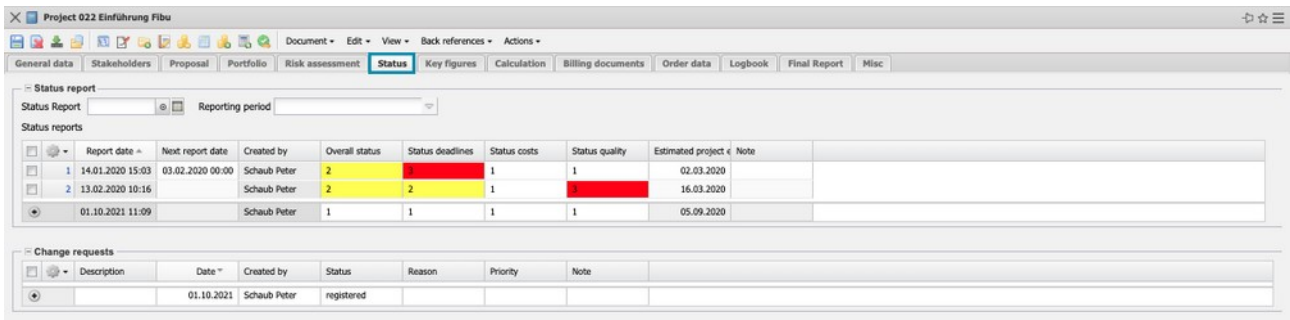
7.9 Status Report and Change Request

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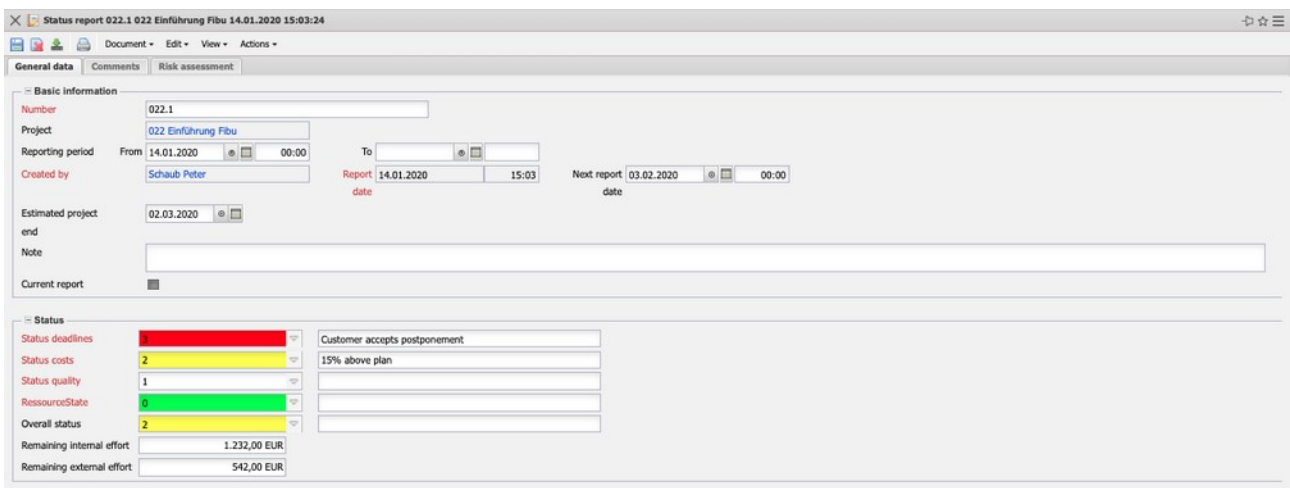
who is working on what, how far the task has progressed, or what problems may arise.

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

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

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

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:

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

... the effects of the change in detail (effort, costs, turnover, deadline, re-sources, target).

Document ▾ Edit ▾ View ▾

General data **Effects**

Effect

Yes ☑ Reason [   ]
Difference [24:00 | 3,000 Pd]

Costs

Yes ☑ Reason [   ]
Difference [1.800,00 EUR]

Turnover

Yes ☑ Reason [Seperate Billing]
Difference [2.800,00 EUR]

Deadlines

Yes ☑ Reason [   ]
Difference [d   ]

Ressource

Yes ☑ Reason [Other Developers]

Goals

Yes ☐ Reason [   ]