Projektron BCS 20.1
More than a project management software
Imprint

Projektron GmbH
Charlottenstraße 68
10117 Berlin
+49 30 3 47 47 64-0

info@projektron.de
www.projektron.com

As of
18.05.2020

Legal notice
Please note that the software, hardware, and company brand names used in this product description are generally subject to trademark, brand, and patent protection.

Great care has been taken in compiling the text and graphics. However, we cannot guarantee that this product description is free from errors.

© 2020 Projektron GmbH. All rights reserved.
## Content

### Functions

<table>
<thead>
<tr>
<th>Function</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project portfolio</td>
<td>6</td>
</tr>
<tr>
<td>Project preparation</td>
<td>9</td>
</tr>
<tr>
<td>Project planning</td>
<td>13</td>
</tr>
<tr>
<td>Project execution</td>
<td>21</td>
</tr>
<tr>
<td>Project controlling</td>
<td>25</td>
</tr>
<tr>
<td>Multi-project management</td>
<td>32</td>
</tr>
<tr>
<td>Time recording</td>
<td>38</td>
</tr>
<tr>
<td>Ticket system</td>
<td>44</td>
</tr>
<tr>
<td>Resource management</td>
<td>50</td>
</tr>
<tr>
<td>Customer relationship management (CRM)</td>
<td>59</td>
</tr>
<tr>
<td>Teamwork</td>
<td>63</td>
</tr>
<tr>
<td>Invoicing</td>
<td>67</td>
</tr>
<tr>
<td>Documents and contracts</td>
<td>71</td>
</tr>
<tr>
<td>Quotation preparation</td>
<td>75</td>
</tr>
<tr>
<td>Reporting</td>
<td>79</td>
</tr>
<tr>
<td>Quality management</td>
<td>81</td>
</tr>
<tr>
<td>User permissions management</td>
<td>85</td>
</tr>
</tbody>
</table>

### Project management methods

<table>
<thead>
<tr>
<th>Method</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scrum</td>
<td>90</td>
</tr>
<tr>
<td>PRINCE2</td>
<td>96</td>
</tr>
<tr>
<td>IPMA</td>
<td>103</td>
</tr>
<tr>
<td>Hermes</td>
<td>111</td>
</tr>
</tbody>
</table>

### Customizing

<table>
<thead>
<tr>
<th>Customizing</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>115</td>
</tr>
</tbody>
</table>

### Interfaces

<table>
<thead>
<tr>
<th>Interfaces</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>123</td>
</tr>
</tbody>
</table>

### Editions

<table>
<thead>
<tr>
<th>Editions</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>127</td>
</tr>
</tbody>
</table>
Functions

BCS stands for Business Coordination Software. The web-based Projektron BCS project management software encompasses quality, efficiency and transparency in projects and companies.

Comprehensive functions – individual customization – reliable technology.
Project portfolio

The Projektron BCS portfolio management enables you to generate and compare project applications from project ideas. You can also compile portfolios for different core issues and decide which projects you actually wish to implement.

Project ideas

The reviewer can see how the project idea was evaluated with just a glance at the diagram.

Employees can easily create a project idea in Projektron BCS. Depending on which project category is selected, the reviewer in charge will receive a customized checklist. The content of the checklist can be specified globally for each category. The reviewer immediately sees the status of the checklist and whether the project idea received a positive evaluation with the pie chart.
Comparison of project applications

Portfolio managers review the existing project proposals in one view with ease

Project applications are used to define the project’s strategic significance for the company. Later, this will aid the portfolio managers when selecting the project applications. The factors for evaluating the strategic significance, such as innovation and efficiency, can be determined globally. If these factors were to change at a later date, the strategic significance can also be calculated subsequently for older project applications.

You can view the project applications filtered by status; mandatory projects to be reviewed will always appear at the top of the application list. The various projects are compared based on their strategic significance. You decide which projects actually get carried out and which are rejected. The progress bar shows you to what extent the project application has been processed or whether there are any pending items. You can change the status of a project application directly in the overview.
Project portfolio management

Keep track of your project portfolios! Create a new portfolio quickly and easily and add the desired projects. A project can be included in multiple portfolios, depending on which focus your portfolio has. Project portfolios assist you in evaluating the projects to be carried out in your company. Additionally, portfolio categories can be used to filter the portfolios as usual.

If you have compiled your portfolios according to different criteria, you can compare them easily in the overview. You can save your cost and effort budgets on the portfolio – this is compared with the costs and efforts in the overview. The colored markings allow you to immediately see which portfolios are below or above budget.

In the portfolio diagram, you can see the strategic importance of the projects in the portfolio at a glance. You can determine how the diagram looks. You can use the mouse to zoom in on the diagram and take a closer look at the projects in your portfolio. If you click on projects, they will fade out in the diagram, and you will see how a project affects your planning and the costs using budget values.
With the project management software Projektron BCS you professionally launch the project.

**Software-based target definition**

Diligently and precisely defined project goals form the foundation for professional projects. Our project management software purposefully supports you with proven project management instruments.

The project management software supports you with handy forms for the precise formulation of main goals and sub-goals along with their qualitative and quantitative assessment standards.

Of course, how many goals you enter into Projektron BCS is up to you. Thanks to dynamic target hierarchy graphics, you can even keep an eye on all goals for fine-grained target definitions or very large projects.
Stakeholder management

Special attention is paid to stakeholders in Projektron BCS. In our project management software, you can gather the potentials and interests of all parties involved and analyze these on the basis of a dynamically generated matrix.

In doing so you can recognize possible opportunities and potential conflicts early on and can react in a timely manner with the appropriate strategy for successful stakeholder management.

Project environment analysis
How might parallel projects effect my project? Are there synergy effects or conflicting relationships.

The project environment is a crucial factor for the success of your project. With Projektron BCS, you can quickly gather the most important framework conditions of your project and see the influencing variables at a glance thanks to the graphical assessment.
Risk management

Despite good preparation and knowledgeable planning, external and internal events may disturb or even endanger the successful progress of projects.

With risk management from Projektron BCS, you can clearly keep track of possible risks and how likely they are to occur during all stages of a project: preparation, planning as well as execution. In addition to a risk list or a risk chart, you can show all risks in the project overview or in the structure plan if needed. In order to structure risks better, it is also possible to create sub-risks and use them for filtering.

Projektron BCS risk management professionally supports you when preparing measures for risk reduction. In addition to creating detailed risk reduction measures, our project management software is also capable of performing a system-controlled evaluation of said measures. Automated calculations for cost reduction provide you with information about the quantitative efficiency of your measures.

You can also enter how the probability of occurrence was reduced by a countermeasure and compare the values before and after the countermeasure in a clear risk chart. An important attribute in this regard is the risk value, which is used to assess the risk in terms of degree of severity and probability of occurrence.

In addition to the risks, opportunities can be recorded, categorized and their positive effects on revenue, cost savings and time savings assessed. Support measures that increase the likelihood of opportunities can also be defined.

Read more: „Project controlling“ on page 25.
**Transparent communication**

Whether you’re working directly in the web-based project management software or with a handy report – with Projektron BCS, you can quickly inform all stakeholders about your project goals. This way you can ensure transparency and contribute to the common understanding of your project without too much effort.

**Red more:** „Reporting“ on page 79.
Project planning

Plan your projects professionally with Projektron BCS: Work packages, tasks and milestones create more transparency while automatic calculations ensure efficiency.

Planning wizard

Whether you have bottom-up, top-down or reverse project planning: Projektron BCS supports all three approaches. If your project planning starts at the task level, the bottom-up mode conveniently supports you in determining the total budget.

If, however, the total budget is already specified, you can distribute your budget to sub-projects and tasks in top-down mode. If you opt for reverse project planning, you can use the advantages of both planning models.

The project wizard, which guides you through the most important planning steps if desired, can adjust itself to the selected planning mode.
Project phases

At the beginning of a project, there is often only little information available. Using project phases, it is possible to develop an initial schedule in the early stages of a project and expand it bit by bit.

In Projektron BCS, the phases for all projects can be defined centrally. A specific color can be defined for each phase. If a company works with different project phases that depend on the project type, this can also be mapped.

As a project manager, you can use the predefined project phases to create a project-specific phase schedule with just a few clicks.

Project planning with templates
Save time with Projektron BCS starting in the planning phase. Whether it’s complete project structures, individual tasks, checklists, workflows or tickets: You can create templates according to your needs and flexibly transfer them to projects. Even plan data can be saved. If you want to create a new template, an wizard supports you. Or: You just copy a successful project into the Projektron BCS templates management.

Read more: „Quality management“ on page 81.
Project work breakdown structure

Project structure plans divide projects into clear parts and thus form the basis for all project management activities. Projektron BCS provides two options for displaying your project work breakdown structure.

In the convenient tree view, you can edit your project structure and navigate flexibly through the various structure levels.

The graphical view shows your project work breakdown structure as an organizational chart and makes it possible to identify hierarchical project structures particularly fast. The graphical work breakdown structure also shows personnel allocations and uses status colors to provide information on how processing of the structural elements is progressing.
Work packages, tasks, milestones and dependencies

Partial projects, work packages, tasks and milestones allow you to structure your projects professionally in Projektron BCS. The individual project structure elements can be linked by means of the dependencies Finish/Start and Start/Finish. Accompanying tasks (hammocks) can also be mapped. You can change the order of your partial projects, tasks and work packages using drag-and-drop. If you are not entirely satisfied with the changes, Projektron BCS restores the original state with a single click.

The level of detail to apply to your planning is up to you. In the clearly arranged tree view, you can structure your project to the desired depth and even specify work instructions in checklists and workflows.

If you enter information regarding the sequence and duration of structural elements already in the project work breakdown structure, Projektron BCS will calculate the suitable schedule if desired.

Read more: „Project controlling“ on page 25.
Time plan with interactive Gantt chart

Keeping an eye on the schedule during planning – thanks to the interactive Gantt chart in Projektron BCS a simple task: Milestones, dependencies, tasks and task packages are presented in form of a bar chart on a time line and can be edited with just a few movements of your mouse.

For this purpose, you can use the Gantt chart as a flexible planning component, which can also easily be integrated into the effort and structure plan.

As an evaluation, the Gantt chart offers you numerous display options, such as for the critical path.

Read more: „Project controlling“ on page 25.
Project resource management

You can define who is to be part of your project team in the team planning of your project easily using drag & drop. Even perform temporary planning with placeholders is possible.

Whether you are planning on a monthly basis or for the entire project, you can define how time-intensive the use of your team members should be in the individual project tasks and work packages directly in the Projektron BCS project plan. The project plan provides additional assistance via the dynamic display of the resource load. This means that when you make any changes to the project plan, the effects on the employee’s workload will be visible immediately.

The reason why a team member is overloaded can be analyzed in detail in the resource preview. Thanks to the practical tree structure, you can easily show your team members’ appointments, projects and tasks.

The Gantt chart indicates potential resource bottlenecks within your project.

Resource-based scheduling takes convenience to the next level: If required, Projektron BCS will adjust your planning so that the specified maximum workload of each employee is not exceeded.

Read more: „Resource management“ on page 50.
System-supported cost calculation
The multi-step cost planning process in Projektron BCS builds directly on the structure and effort plan, which enables you to perform early and well-founded calculations. In addition, the universal structure forms the basis for target-actual comparisons during the course of the project.

Both internal and external hourly and daily rates are maintained centrally in Projektron BCS. If you specify the required resources for your project, Projektron BCS will automatically calculate the personnel costs. Needless to say, you can also add material costs to your calculation.

The calculated costs can be assigned to cost centers, cost types and cost units and can be evaluated.

Read More: „Project controlling“ on page 25.

Multiple currencies

You calculate in euros, your customer in US dollars? You can easily plan your projects in Projektron BCS – even in multiple currencies. You can calculate easily in your local currency, while Projektron BCS prepares the corresponding offers and invoices in your customer’s currency. Simply select the desired currency for depicting costs in the evaluations. To do this, Projektron BCS features a preselection of currencies which you can expand as you wish. Required conversion rates can be loaded automatically or entered manually. External hourly rates, daily rates and article prices can also be maintained and applied appropriately to the project centrally in all currencies relevant for your company.
Have you agreed on a fixed conversation rate with your customer? Projektron BCS can also use this for calculation. Because: You can define conversion rates for your project with a click.


Comparable planning statuses

Intermediate statuses of schedules and work breakdown structures can be documented as a baseline in Projektron BCS and compared with the current or another baseline in the Gantt chart.

You can also compare team plans, effort plans and material cost plans in a tabular baseline comparison. Changes between the planning statuses are highlighted in color and easy to see. The planning statuses can be reset if needed.
Project execution

Efficiently design project work and proactively react to changes: Our project management software supports you with a variety of tools.

Project documentation

Whether you want to record agreements made with the customer or the content of a project meeting: The process protocol allows you and other project employees to collect all information necessary for the project to be completed successfully in one central location – and in chronological order.

Moreover, Projektron BCS features project tickets, which you can use to spontaneously record activities, requests, changes or open items and to which you can assign suitable plan values.

A central document management system that allows you to manage your project documents is integrated in Projektron BCS. As a result, your project team is able to access all relevant documents directly for a project, project ticket or associated project task.

Furthermore, Projektron BCS fulfills all your needs for quality assurance. You can support your project team by providing them with checklists and automated workflows to implement your project successfully and professionally.

Read more: „Ticket system“ on page 44 und „Documents and contracts“ on page 71.
Project calendar
Effective project communication is indispensable to carrying out a project successfully. From the kick-off meeting to regular status meetings to the presentation of project results – in the Projektron BCS project calendar, you can quickly and conveniently create any appointments and summon your team to a meeting with just a few clicks. For a better overview, you can also view important partial project objectives, the milestones, directly in your personal calendar.

Read more: „Teamwork“ on page 63.

Workforce planning

The Projektron BCS workforce plan lets personnel managers and project managers define which projects and tasks should be given high priority in the current week. So you can be sure your project is headed in the right direction. At the same time, your employees are provided with clear specifications in terms of their daily project work.

Read more: „Resource management“ on page 50.
Project-related time recording

In Projektron BCS time recording, your team members book their time directly to the tasks to which they have been assigned in the project. Moreover, the team can make estimations regarding the remaining time required and set the task status to “complete”. Projektron BCS automatically transfers all values to the project so that current information about how the project is developing is always available to you. If you need more detailed information, booking comments can be shown within the framework of project controlling.

Read more: „Time recording“ on page 38.

Change request

Should your project planning change, it is possible that change requests need to be approved by the steering committee before you can act as project manager, depending on the scale of your project. Flexible functions in Projektron BCS give you various options on how to display a change request in your project. A convenient way to do this is through tickets, for example. The benefits: Tickets can be clearly identified, the status history can be monitored at a glance and specific processes can be configured accordingly.

Read more: „Ticket system“ on page 44.
If Kanban is selected as the procedure model for projects, the Kanban board is available to you as the project manager. Use drag & drop to move tickets or tasks to different statuses and priorities; you can also select one or more team members and add them to the ticket as processors. You can use the settings to define which status you wish to view and to what extent the related information is to be displayed.

You can also define how many tasks can be worked on at the same time; if the maximum number of tasks is exceeded, the respective column turns red. The number of tasks that can be processed is easily defined in the settings.

Questions on tickets can be created via the Edit function of a Kanban card. Additionally, all processors of a card can easily be removed again by deleting them via the recycle bin icon. And: The contents of the Kanban board can be adjusted easily via a period filter.
Project controlling

Using graphical evaluations, target and actual values comparisons, and forecasts, our project management software provides information for effectively controlling individual projects and complete project landscapes.

Project overview

In your project’s Dashboard, the project overview, you can see current activities and developments in your project at a glance.

The bar charts provide a simple overview of costs and efforts and you can directly see whether you are making profits or losses. Using the tachometer graphics, you can easily detect plan deviations and quickly evaluate their effects on your project.

In addition to these graphics, the project overview provides numerous other elements you can show as required, such as upcoming project deadlines, pending project tasks and potential project risks. All elements can be arranged using drag & drop.
Flexible evaluation dimensions

Whether it is traditional cost accounting with cost types, cost units and cost centers, or evaluations along the project structure: in Projektron BCS, you can evaluate the dimensions which are important to you; for example, you can compare the planned values for costs and turnover with the actual values. The cost baseline and cost totals are brought together in one clear diagram, enabling you to view the progress of your planned and actual costs over time. Even special evaluations can be performed. For example, you can have all open checklist entries displayed. In addition, you can evaluate plan data and actual data from the past, present and future for every employee or department. Plan deviations, free capacities and capacity bottlenecks are highlighted in color, thus making your resource management easier.

The cost overview shows you if you are within budget and where additional costs arise in the project.
Thanks to the various project controlling functionalities in Projektron BCS, Gantt diagrams not only support you in well-founded scheduling but also help you to keep an eye on changed deadline and their effects while carrying out a project. For example, you can see the latest state of planning in direct comparison to the current project state in Projektron BCS. With processing state and project progress view options, you can also see how well you are on target.
Current status along the project structure plan

The project structure plan is one of the most important instruments in project management. Evaluations for comparisons of target and actual values and the related forecasts are displayed on all levels of the project structure in Projektron BCS. The practical tree structure ensures clear representation and allows you to navigate easily to deeper project structures, for example during analysis of deviations.

Comparison of target and actual values
For effective project controlling, deviations between the planning and realisation of a project must be recognized early on in the process. Projektron BCS offers you a large number of comparisons of target and actual values for the central assessment criteria of performance, costs and time.

Projektron BCS uses traffic lights to signal whether you are deviating from the plan. The values that switch the traffic lights to green, yellow or red can be configured.

The basis for cost comparisons is the planned and booked personnel efforts and hourly rates. Projektron BCS uses these values to calculate the target values and actual values for the personnel costs. Together with the planned and recorded material cost items, these values form the target values and the actual values of the total costs.
**Projected budget overruns**
In Projektron BCS assessments, projected time and cost overruns are marked in red. This way you can see possible deviations from your plans before they even occur and can take appropriate measures at exactly the right time. The estimates of remaining efforts from time recording as well as the estimates of remaining values from material costs serve as the basis for the forecast.

**Subsequent changes to plans and history**
A customer has requested changes or a risk has actually occurred: Despite solid planning and vigilant project controlling, there are many events that can lead to deviations from the original plan. This might manifest itself in the structure plan or in the Gantt chart. Projektron BCS allows you to reschedule easily and quickly – even after the project has already started.

Any changes in the project can be clearly traced using the graphical history. The chart not only shows the development of the external order volume and your internal planning; it also provides an overview of the development of the actual values and remaining values in chronological order.

**Milestone trend analysis**

![Milestone Trend Analysis](image)

_Milestone Trend Analysis - Milestone trend Analysis_

With the help of a diagram, the milestone trend analysis shows to which extent milestone deadlines are being adhered to. This type of project controlling assessment is particularly suited for stakeholders such as management or customers who need a short overview of how the project is developing. If necessary, you can export these as an SVG file and insert them into presentations, for example.
Earned value analysis

Bundled in the earned value analysis: actual costs and budget costs as well as performance and forecast values

The earned value analysis allows you to see the cost and date situation in your projects at a glance. The project controlling tool, recommended by the German Association for Project Management (GPM), evaluates the plan fulfillment based on the project progress and deduces a forecast for how the project will develop.

Whether optimistic, pessimistic or realistic: all three forecast methods described in the GPM standard are supported by Projektron BCS 7.8. In addition, you can select the method according to which the project progress is to be calculated. Both progress calculation on the basis of material costs and time bookings and the GPM calculation rules 0/100, 20/80 and 50/50 are supported.

The most important KPIs are displayed directly when you move the mouse over the diagram. Below the diagram, you can specify the time period you want to evaluate; the diagram reacts accordingly and increases or decreases the display.
**Notification by e-mail**

Is there a danger of exceeding the project budget? Is a delivery date approaching? Is any partial project objective overdue? Projektron BCS sends extra email notifications for events like these. This helps you recognize at the right time where you need to adjust your project work to bring the project back into line.

**Project reports**

Whether you’re dealing with project managers, specialist departments, management or customers, stakeholders of all varieties need information regarding the status of your project. Both the degree of detail and the content itself will depend on the function of the stakeholder.

With just a few clicks, you can generate important standard reports for the central assessment criteria of performance, costs and time in Projektron BCS. Moreover, you can adjust the standard report templates to your individual needs and supplement them with the Open Source report designer BIRT.

In addition, standard templates for project application and project closure can be added per project category. The corresponding Final Report view now contains checklist items that support the project closure. The project closure report can be generated and supplemented with additional documents.

It is also possible to design new report templates. Of course, the additional report templates can be integrated into Projektron BCS and generated just as easily as standard reports.

**Enhanced data protection**

Employee assignments ensure a clear division of tasks and transparent responsibilities in ongoing projects. In projects from a long time ago, the specific personal reference is often no longer required. When working with Projektron BCS, you can remove employee assignments from closed projects.

The anonymization is initiated manually, for example, by the company’s data protection officer or automatically via a defined CronJob. During the anonymization, Projektron BCS deletes the links to employee records from project elements with personal reference, such as from team and effort plans, project bookings, change histories or tickets. All other data related to the project remains intact and can be evaluated as usual.

**Read more:** „Reporting“ on page 79.
Multi-project management

Bet on the right projects: With portfolio graphics, resource planning for project groups and multi-project controlling functions, Projektron BCS provides you with the basis for strategic and operative multi-project management.

Multi-project controlling

With Projektron BCS, executives can keep an eye on all projects relevant to them as well as their most important key figures and possible missed deadlines. So the cross-project evaluations not only show target and actual values but also the remaining efforts estimated by the individual project teams.

Projektron BCS displays the project duration and project phases on timelines. Using the day marker, managers of multiple projects can immediately see the current status of all their projects.

Critical project statuses can be quickly identified in the graphical multi-project evaluation. A total cost diagram for each project as well as colored areas for profit, effort, total costs, personnel costs and material costs show in which projects action is required by management. Using traffic light colors, they evaluate the current project status and show the actual values as well as the deviation from plan in percent.

Read more: „Project controlling“ on page 25.
Project groups and project categories

You can group your company’s projects into project groups.

These project groups can be created flexibly and nested as you wish. Thanks to the transparent tree structure, you can easily show or hide the various structure levels. This enables multi-project managers to perform a quick root cause analysis in case of plan deviations.

Furthermore, you can group and evaluate your projects according to additional criteria using project categories.
Project portfolio assessments

Which projects are particularly important for your company? Projektron BCS compares the projects based on their complexity as well as their benefit for the company. The graphical assessment in a matrix illustrates the business value of your projects and supports you in strategic decisions with regard to your product portfolio.
Resource planning for project groups

As a multi-project manager, you can already define how much manpower is to be invested at the project group level. You can easily see whether your budget specification is consistent with the project planning of your individual project managers: In resource planning, Projektron BCS visualizes the amount of your resource budget for the project group that is already planned in specific projects.

You will particularly benefit from this function when working with quota agreements: You can book a resource budget in Projektron BCS even before planning a specific project. This ensures that the resources are not planned in other projects.
Identifying dependencies: Cross-project milestones in the Gantt chart

You can link several closely interwoven projects in our project management software with external milestones. The Gantt diagram provides a clear overview in which you can have the external milestones in your projects displayed right at the top project level. The cross-project milestone history shows you how well you adhered to selected milestone deadlines. Program managers and multi-project managers who use milestones as indicators for adherence to deadlines and project progress benefit especially from this.

Read more: „Project planning“ on page 13.
The multi-project board provides an overview of all projects in your company. You can see which projects are planned, authorized or pending, and can adjust the status of each project by dragging the individual project to the respective column. The multi-project board displays your projects either by their status or, additionally, by their priority or project category. For pending projects, you can see the most important KPIs for efforts, costs and profit in reference to the planned values.
Time recording

Record working hours for each project and task: Quick and simple time recording with the ergonomic booking entry forms in Projektion BCS and the Projektion BCS app – even on your smartphone.

Mobile time recording via app

With the app for Projektion BCS time recording you can quickly record your time on the go.

You can record your working hours and breaks as intuitively as individual activities: In the day booking entry form optimized for smartphones, you can find all booking elements of Projektion BCS – starting from project task to your appointments, tickets and Scrum activities.

On the go or in the office: you have access to the most recent information. A special web service ensures secure data transfer.

The Projektion BCS app is already available for Android smartphones, iPhones, Windows Phones and BlackBerry smartphones.
Precise assignment of tasks and projects

For multiple activities on one day: The daily booking mask in Projektron BCS standard

With Projektron BCS, your employees book their time spent directly to the corresponding tasks. This way activities are efficiently documented and can simply and conveniently be included in invoices. In addition to tickets, workflows, Scrum elements and appointments, tasks can be saved to persons, so that your employees can make direct bookings to the person.

Thanks to the fact that tasks can be composed individually, employees only see the tasks relevant for them in the time recording view. This allows for a smooth and quick booking procedure.

Read more: „Invoicing“ on page 67.
Ergonomic booking masks

Projektron BCS attaches great importance to ergonomically efficient time recording and seamlessly integrates itself into different working processes with different booking masks.

If your work consists of large tasks that need a lot of documentation, the Projektron BCS individual booking mask is particularly convenient thanks to its ample space for documentation.

If only a few comments are necessary, complete working weeks can be conveniently presented in the weekly booking mask.

Many different tasks and appointments on the same day? The daily booking mask conveniently shows everything on one page. Even tickets and scrum activities can be shown.

Use the built-in stopwatch to see exactly how long you needed to process the task and what you can invoice the customer. The stopwatch is available in all Projektron BCS views, so you can book quickly and exactly to the right tasks.

There are many ways to book your tasks, so simply define your preference. One block shows you the last booked tasks to allow you to quickly book any subsequent work.

Or simply define your booking favorites yourself - on those you can book quickly and conveniently directly in the stopwatch. Using the search function in the day booking entry form, you can either enter the desired task for a booking directly or you can conveniently select the task by entering the project, ticket or customer.
**Processing status and remaining time required**
In addition to booking completed jobs, employees can also make estimates for the remaining time required. With this information, project managers can keep an eye on current processing statuses and trends, and they can quickly recognize deviations from plans and take appropriate measures if necessary.

*Read more:* „Project controlling“ on page 25.

**Overbooking blocks**
With overbooking blocks, you can ensure that time and budget overruns do not occur. Regardless if time or money is the deciding factor for you: You can individually select when Projektron BCS blocks employees from making bookings to your whole project, sub-projects, work packages oder tasks. In performance types that were specified by you, you can allow overbooking despite lock, for example for business trips.
Operating activities

Time recording in Projektron BCS even considers tasks which occur beyond the scope of project work. This allows your employees to document all tasks which have been carried out. This is also a plus for resource management, since the holistic approach helps to survey the complete range of employees’ tasks and efforts.

**Working hours account**

Whether full time, part time or hourly accounts – parental leaves or sabbaticals: Projektron BCS lets personnel managers create working hours models easily and conveniently, which serve as the basis for your employees’ working hours accounts.

Projektron BCS matches the booked working hours on the working hours account with the target hours and determines the amount of overtime automatically.

If an employee closes his or her working hours account – at the end of the month, for instance – then he or she can simply indicate whether or not the overtime should be paid out and, if so, how much of it. The employee can also choose to transfer the overtime to the next month. You decide which options are available to each individual employee.

**Read more**: „Resource management“ on page 50.
The working hours evaluation shows a clear overview of the hours you have worked

How many working hours have I accumulated this month? How many leave days can I still use? The working hours evaluation answers these and similar questions by providing the employees with graphical evaluations and clear reports.

Personnel managers also have access to detailed working hours evaluations in Projektron BCS. The project management software informs you about attendances, rest periods, breaks, sick-leave days and leave for both individual employees and entire departments. A balance indicator shows discrepancies between actual working hours and target working hours.

Read more: „Resource management“ on page 50.
Ticket system

Thanks to software-based customer communication, flexible registration of expenses and precise invoicing, you can manage customer inquiries and project tickets in Projektron BCS in a quick, efficient and cost-saving manner.

Digital registration of customer enquiries

With their own accounts, customers can log into the Projektron BCS customer support system and enter their enquiries as tickets – it’s quick and uncomplicated. This way your customers can reach you at any time – and you keep track of all incoming customer enquiries.

If a ticket becomes too extensive or labor-intensive, you can change it to a project task with one click: All the important ticket data such as subject, description and previously booked efforts are automatically transferred by Projektron BCS and the full functionality of a project task is provided.

Read more: „Project execution“ on page 21.
Flexible service hours and reaction times on tickets

As a business, you want to provide your customers with a certain level of service quality, for example: At what times can you reach customer support? How long does it take for them to respond to the queries? How are tasks processed with regard to their deadlines?

In Projektron BCS, service hours, reaction times and early warning stages up to the task level can be defined in detail. You can define the time period in which your support can be reached as service hours according to type of ticket, priority and day of the week. If you offer premium support for your top customers, you can define this too.

Early warning stages help you stick to your reaction times. Should pressing requests be replied to within 8 hours? Set an early warning stage, if the deadline is only hours away.

You can use the mailing list to specify who is to be informed at this point. Either you name a specific person or, in addition to that, you send a message to the project manager or ticket processor in charge.

What stage of escalation your tickets are currently on can be seen at a glance; this way you and your team members can see what tickets require more attention than others.
Internal tickets

Whether you want to make change requests to the project, keep a list of open points or carry out internal services: The Projektron BCS ticket system even provides various options for company-internal use and ensures smooth processing development.

Email notification with comment function for tickets

Whether a new comment has been inserted, a processing status has been changed or relevant files have been uploaded: Projektron BCS automatically informs your customers of any ticket changes via email. If you respond to a ticket notification in your email application, Projektron BCS imports your comment and assigns it to the corresponding ticket. In addition, attached image files are filed directly in the file repository and are displayed either in the master data or directly on the respective ticket comment.

Simple assignment of tickets

Thanks to the assigning tickets according to type and priority, a quick differentiation of tickets and forwarding to the responsible expert is possible – immediately after receipt. This way processing times are reduced and problems are solved quicker – for your customers’ satisfaction.
**Reusing ticket solutions**

Be it questions, suggestions, errors or extension requests: The ticket system by Projektron BCS contains centrally documented customer inquiries and solutions.

You can use this stored knowledge systematically to issue new tickets and create FAQ entries.

Projektron BCS also offers you the possibility of marking comments as solution-relevant. The green symbol shows your colleagues immediately which ticket comments contain the profitable information.

And if you manage frequently-asked questions in the FAQ section of Projektron BCS, then Projektron BCS makes it possible for you to generate new FAQs from solution-relevant ticket comments in no time.

**Time recording and invoicing**

You can record the efforts required for processing directly at the ticket and invoice them to your customers, for example partially automated by using the invoice generator of Projektron BCS.

*Read more:* „Time recording“ on page 38 und „Invoicing“ on page 67.

**Linkable to Scrum elements**

If you use the Projektron BCS ticket system in connection with the agile project management method Scrum, you can conveniently link the two tools: Using the customer tickets, you can create a user story with the click of a mouse or add the ticket to an already existing user story.

*Read more:* „Scrum“ on page 90.
Ticket evaluations

How efficient is ticket processing? The ticket evaluations in Projektron BCS provide insight

A dynamic board view allows compiling ticket evaluations on a customized and as needed basis. You can have evaluations displayed via many different dimensions as pie charts and bar charts. This makes it possible for you to keep an eye on all developments and quickly retrieve all the information you need.

All charts can also be saved as scalable SVG graphics and thus be used again for further applications.

Tagging system
You can get a better overview of your tickets thanks to the integrated linking function for related tickets and duplicates and to the ability to assign tickets to predefined tags.

A powerful search and filter function in which you can combine full text search and numerous other search parameters helps you if a ticket has to be found quickly. These search settings can easily be saved as a presetting if you perform certain searches more often.
Support portal
On request, the external support portal provides an especially high level of data security. After server setup, customers upload their tickets to a separate server while your employees can continue working in the internal Projektron BCS as usual.

Only that data which you want to share with your customer ends up on the external support portal, while your employees can see all data required for editing a ticket in the internal Projektron BCS.

You will also see the synchronization status between your internal Projektron BCS and your support portal on tickets. Using a traffic light, you can see whether the ticket was synchronized or whether there were problems with the synchronization.
Resource management

Use your resources optimally: Projektron BCS creates new opportunities with its central employee management and planning support.

Resource provision for projects

Be it a personnel or project manager: The resource provision for projects can be flexibly customised to suit your company’s processes through the Projektron BCS permissions matrix.

Having been granted the relevant permissions, line managers can specify the persons to be included in the project team without a project reference. These assignments can be amended in just a few clicks, for example for capacity shortages.

It is also possible to strictly separate resource management and project management. If the project manager plans his projects with placeholders, the line manager can replace those with his employees.

Whether on internal departments, external employees or directly on the project: Projektron BCS supports you with daily scheduling for employees over long periods of time. The Appointment planning view shows which employees are already booked with appointments on which days. This makes it easy for you to see which employees are booked and which are available. The overview also shows which appointments take longer and where appointment conflicts exist.

Read more: „Project planning“ on page 13.
Leave management and deputy regulations

You want to go on holiday? With the calendar, you can plan and request holidays and time off instead of compensation in next to no time. Whether it’s this year’s holidays or unused time off from the previous year: You can always see your current holiday entitlement in Projektron BCS.

You can see when and how long your colleagues will be absent at a glance in the calendar as well as in the holiday plan. Even public holidays, individual working time models and sickness are considered.

As a personnel manager, you will be informed via e-mail by Projektron BCS as soon as one of your employees applies for holidays. With one click, you can approve or reject holiday applications. From employee notification to arranging backup to updating the holiday plan: Projektron BCS automatically takes over all further steps for you.

Be it illness, leave or a business trip: a deputy is required when an employee is absent from the office. With the deputy appointments in Projektron BCS, you have the opportunity to simply organize your deputy.

In the defined period of time, the deputy can access your personal overview and attend your appointments. In your absence, the deputy can also edit your tasks, tickets and workflows and book his efforts.

You cannot take your leave? Conveniently request a cancellation on your leave date – the HR manager will then be informed of your cancellation request.

Read more: „Teamwork“ on page 63.
To manage employee capacities systematically, it is important to know the extent of the workloads for entire departments and project teams, as well as for individual employees.

Projektron BCS determines the extent of your employees’ workloads not only on the basis of planned project deployments and agreed upon working hours, but also considers other crucial influencing factors such as current estimates of remaining efforts from ongoing projects and tickets, baseline loads from daily business, leave, flextime compensation, holidays, and sickness-related absences.

The workload chart gives you a quick overview: The graphic summarizes the most important information and shows you in a clear way overloads and underloads of individual employees as well as entire company divisions.

The Project effort/Department matrix shows you the extent to which a department is involved in a certain project and who has free capacities. The matrix also gives you vital information concerning the project status, duration, and pending remaining efforts.

The resource preview gives you even more in-depth evaluations: For example, if you want to analyze the reasons for an employee’s work overload in further detail, you can display his or her appointments, projects, tasks and tickets.
Central employee data
Current, consistent employee data which can be quickly accessed by authorized persons is a standard in our project management software. You can centrally manage your internal organizational structure including all personnel-relevant data in Projektron BCS resource management.

Thanks to our holistic approach, structured data sets provide for numerous synergy effects. This means that contractually agreed upon holidays are automatically shown in holiday management just as the working time model serves as the basis for time recording and the resource preview.

In addition, you can centrally manage and flexibly group internal hourly rates, for example according to qualification level, tariff or department. This saves time, particularly in data maintenance.

Read more: „Time recording“ on page 38.
Job application management

From the detailed recording of job applications all the way to hiring: Projektron BCS makes it possible for personnel management to record submitted applications with all the relevant information quickly, thus helping the team to select the suitable candidate.

Job applications cannot only be recorded for external persons, but also for employees. The program also allows you to directly manage internal job applications.

Use statuses to access the current status of the job application, which also includes options for the further procedure – Projektron BCS guides you safely through the entire job application process.

And if you want to get to know an applicant personally, you can arrange a meeting in just a few clicks. Thanks to the new appointment category, invited employees can see at a glance in their calendars that a job interview has been scheduled for them.

Regardless of whether it is a personnel manager, department head or employee: everyone involved in the application process can store their personal rating, and thereby support the well-founded applicant selection.

Once you have found the suitable employee, the recording is the easy part: Applicants can be simply moved to an internal department in Projektron BCS. It is no longer necessary to create the master data again.
Flexible organizational structures

From branch offices to departments all the way to individual employees: In the resource management of Projektron BCS you have the option of depicting your organizational structure easily and clearly. In addition, you flexibly define person groups independent of department or project.

Entire person groups as well as individual persons can be assigned by you as project manager already during project planning. Here you can easily access the data saved in the resource management and can even have the workload for each employee or the entire person group during the project duration displayed to you.

**Read more:** „Teamwork“ on page 63 und „Project planning“ on page 13.
**Skill management**
Who can do what in the company? This is not only a question that is very important for personnel planning but also matters to project managers, especially during the team building phase.

In Projektron BCS resource management, employees can enter and evaluate their skills in the employee master data section. For protection against duplicates, the skills that can be selected by the employees are centrally managed.

Via search masks, project managers and personnel managers can conveniently find employees with specific qualifications, language skills or certificates, check their availability and therefore deploy experts in the company in a targeted manner.

*Read more:* „Project planning” on page 13.

**Wage premiums**
Whether you are managing travel times, night work or weekend work: Projektron BCS enables personnel managers to manage variances in regular wages centrally. Your employees choose the appropriate exception rule directly in time recording.

Hourly rates that differ from the basic wage can be mapped flexibly and evaluated precisely, as can the percentage and absolute surcharges and reductions.

You can even define validity periods for these exception rules – for example, from 11:00 p.m. to 6:00 a.m. or Sundays – with only a few clicks.

In addition, you can define whether surcharges are to be paid out, transferred to the working hours account or credited to the flextime compensation budget by default.

Do you bill your customers surcharges in their invoices? These external surcharges and rules can be saved directly to customers or projects. The special agreements are invoiced to the customers accordingly.
Travel expenses settlement

The integrated allowance management feature in Projektron BCS allows your employees to enter their travel costs and receipts even during their trip. If employees go on the same business trips frequently, they have the option of simply copying the information for past trips. Such trips can also be saved as a Favorite and can thus be retrieved quickly. As the project manager, you can see the total amount of travel costs for your project and how much of it you can invoice the customer.

If a single trip involves visits to several different customers, it is possible to invoice the travel costs incurred for each individual travel segment to the respective customer. In addition, the country of work may be specifically added to each employee, so that both the valid allowance rates and multi currencies are taken into account.

A status-based workflow reliably ensures that your project is executed correctly. After release by the employee and verification by the project manager or accounting manager, Projektron BCS automatically includes chargeable expenses in the next customer invoice.

In addition, you can save and easily charge location-specific trip cost allowances directly in the project.

If an employee incurs costs covered by his or her allowance, Projektron BCS will automatically calculate the reimbursement. This includes any daily allowances.
Material resources
Is the conference room free? Are company cars and laptops ready to be used? A peek in the Projektron BCS calendar is all you need to find out exactly when and how long a particular resource is available. To be on the safe side, you can reserve the required resources in Projektron BCS resource management in advance.

Read more: „Teamwork“ on page 63.
Customer relationship management (CRM)

With Projektron BCS, you have a powerful CRM tool set at your fingertips.

**Customer data**

Address, telephone number, position in the company and much more: In the Projektron BCS customer database, you can quickly access anything about your business partners.

Whether it’s a customer manager or a project manager – everyone involved can access the current information of your customer organization and have the most important key data displayed on a clear customer board.

Once saved in Projektron BCS, you can easily reuse the contact data of your business partners – for example in invoices, offers or newsletters. Repeated data entry is no longer necessary.

**Read more:** „Quotation preparation“ on page 75 und „Invoicing“ on page 67.
Customer communication

After a personal meeting, telephone call or a training seminar: You can quickly enter all important facts that were discussed with your customers, interested parties or service providers in the contact history feature of Projektron BCS.

Moreover, Projektron BCS can import your e-mail correspondence with external business partners directly from your e-mail server and assign them to the right persons in the contact database based on the address data.

As a sales employee, you can also see at a glance whether your communication is in order or whether you need to call a contact partner. The traffic light controlling lists your contacts with the corresponding traffic light icon. If a traffic light changes from green to yellow, it is time for you to contact your business partner. A red traffic light signals that the planned period for contacting has already expired.

Read more: „Interfaces“ on page 124.

Digital newsletter

With the Projektron BCS newsletter function, you can always keep interested parties or customers in mind: Thanks to the powerful Projektron BCS search function, you can comfortably and reliably find newsletter recipients in the address database. You can also specify which sender address is to be shown if emails are sent directly from the Projektron BCS interface. You can copy existing mailings – the subject, text, file attachments and, if necessary, the recipients will all be copied too.
You can also copy the recipients from other circulars, or specify whether to send a serial e-mail despite an existing suspension, or whether the recipient is to be removed from the next copy. You can also specify whether a circular should be sent immediately or at a scheduled time and date.

Whether it’s a Dr. or a Prof.: Projektron BCS automatically selects the correct title for each recipient. With HTML formatting, graphics and any type of file attachment, you can stylishly round off your newsletters.

**Turnover forecast and acquisition maintenance**

![Customer relationship management (CRM)](image)

*How does the next quarter look? The acquisition management provides information*

In Projektron BCS, your acquisitions show you the income you can anticipate in the future. This allows you to analyze important values, such as the probability and amount of acquisitions or predicted closures, at a glance.

If you make specific quotations later, you can take them into account in your acquisitions. If values or the status of your quotation change, Projektron BCS adjusts your acquisitions accordingly. This way your acquisitions are up to date, giving you a well-founded turnover forecast.
Customer login
Does your customer want to be regularly informed about how far along their project is? As a project manager, you can now relax when confronted with this request: You simply install a customer login in Projektron BCS and then the customer can independently obtain relevant information whenever they need it. It is of course up to you which project data can be seen with the customer login.

Read more: „User permissions management“ on page 85.

Connection to the telephone system
Making phone calls is part of contact maintenance and customer management. Projektron BCS makes it convenient and reduces the number of clicks: If a customer who is entered in the Projektron BCS contact database calls you, you can immediately call up their name and all relevant contact information.

This way you can react quickly and for example already enter a memo for the call during the conversation. If necessary, you can also mark this as „confidential“ so only specific persons can see the entry.

Conversely, one click on the link of a telephone number is sufficient – and you are connected with the desired interlocutor, regardless of whether they’re internal or external.
Teamwork

With collaboration tools such as resource-relevant calendar, your team closely cooperates in Projektron BCS even over large distances.

Personal overview

Arrive at the office, boot up your computer and instantly know what tasks you need to face today. Whether they may be appointments, reminders and important tasks for today or pending workflow steps and tickets, your personal overview provides you with a multitude of information which you can show as you wish and arrange using drag & drop.

The personal overview, which is set as the welcome page in Projektron BCS, ensures that you start off your workday on the right foot and that you can manage your day to day work in a relaxed manner. You will be informed by pop-up notifications about calls and appointments, even if you are not working in Projektron BCS at the time.

Also benefit from the instant notifications that inform you directly in the software, for example, if an appointment has been postponed on the current day, or if there is a new ticket comment on a project that you have subscribed to.
Calendar

The calendar in Projektron BCS enables you to manage your appointments efficiently and has many other helpful features as well, such as site and project-dependent holiday calendars, appointment series and user-defined appointment categories. Frequent and international travelers also benefit from time zone support.

Are you planning an important project meeting that will be attended by representatives from several different teams? The calendar in Projektron BCS shows you which days and times the participants have free capacities. If any appointment overlaps are detected, the project management software illustrates them graphically.

You can save time by editing your calendar via drag and drop. You can easily move your appointments or change their duration with the mouse.

Read more: „Interfaces“ on page 123.
Reminders
Whether it’s about a call to a customer in five weeks, submitting business expense invoices by the end of the week or a briefing with accounting on the 1st of the following month: With Projektron BCS reminders, you can quickly create virtual reminders for even the smallest activities. Projektron BCS then shows exactly when the time comes to complete it. This way you can always clear your mind for the things that currently need to be done. Delegating tasks to others is not a problem either: With the click of a mouse, you can send e-mail notifications to your colleagues so that they are immediately informed with the new reminder.

User messages
You can send simple messages to other users with Projektron BCS. The message can be sent to one or multiple recipients and a context reference, for example a ticket, can also be specified if necessary. You can therefore send a direct message to your project team from the ticket, making the reference immediately visible. Received messages either appear discreetly in the navigation bar as a small number or as a pop-up window, depending on their urgency. In the settings, every user can choose whether they wish to receive such messages or not. All user messages can be managed or deleted in a single clear view.

Multilingual user interface
Whether it’s German, English, Spanish, French, Dutch or Hungarian – the languages available in Projektron BCS create more convenience for international projects. If languages are activated, every user can select their preferred language with just a few clicks.
Support for web conferences
Ensuring smooth team communication is especially important when your team is distributed over several locations. You can easily achieve this with the web conference dates that are integrated into the Projektron BCS calendar. You just invite your project team to a meeting via the web conference software Adobe Connect and Projektron BCS automatically provides logins for your virtual conference room to all participants via the corresponding interfaces. At the time of the web conference, clicking the link of the date is sufficient for entering the virtual conference room and taking part in the meeting.

Read more: „Interfaces“ on page 123.
With Projektron BCS, you can create expenses and fixed price invoices based on projects – all the while using several currencies.

**Variable project invoicing**

The integrated time recording allows your employees to book directly on your project. Billable bookings can be checked and invoiced easily and for specific projects.

Whether material costs, travel costs or external services: Projektron BCS can also add all other billable items to your invoice if desired, thus allowing complete and accurate invoicing. Any discounts negotiated in quotations are indicated separately during invoicing.

If you work with standard services or standard materials, you can save these as articles in Projektron BCS and apply them to your project. If necessary, standard sales prices and scaled prices for articles can be adjusted for specific projects and invoiced accordingly. In combination with creating quotations, interval related fees can be set up on article types, for example for invoicing update fees.

If you have agreed with your customer on a fixed price for the entire project or subproject, this can be invoiced just as easily. If the hours contributed by your employees are to enter into the invoicing on a pro-rata basis, simply specify this by using project-specific invoicing factors.

**Read more:** „Time recording“ on page 38, „Resource management“ on page 50 und „Quotation preparation“ on page 75.
Invoice templates and invoice generator

Whether manually or automatically: Projektron BCS makes invoicing easy for you. A wizard will guide you through invoicing step-by-step when you want to create invoices or credit notes. If you also work with invoice templates, you can store your contact data, payment terms, standard phrases and your logo once and simply reuse them time and again.

The invoice generator carries out even more working steps for you. Whether total invoice, split invoices, down payment invoices or final invoice: The billable amounts for all projects are compiled in temporary invoices for you, for example in a monthly cycle. It is particularly efficient to automate invoices that you create at regular intervals, for example as part of maintenance contracts.

Discount provisions in invoices

You can store discount provisions for payment terms and specifically define the deadline within which a discount shall be granted for the invoice as well as the discount amount.

Based on the payment dates, payment amount and traffic lights, you can immediately see which payments have been made within the due date for the discount deduction. By actively setting the payment status, you can differentiate which invoices have been paid with a discount and which invoices you will grant a goodwill discount deduction despite overdue receipt of payment.
Invoice per email and dunning run

Whether it’s a single invoice or an entire invoice list: Projektron BCS can generate the corresponding e-mail with a ready-made cover letter, add the invoice and related hours and allowance vouchers as PDFs and even copy your customer’s e-mail address from customer management.

Of course you can customize the cover letter as you see fit and attach additional files, if required.

If customers exceed the specified due date, you can view the outstanding items in your invoice list with the Dunning Run setting. There you define your dunning action: If you carry out the dunning action “Create written dunning” or “Create last written dunning” on the invoice, a corresponding PDF document is generated automatically and adapted to the status of the invoice.

Furthermore, you can have PDF documents automatically stored to a previously defined folder – from which you can print the collected dunnings and send them.
Flexible currency selection
You have business partners in other countries and want to bill your projects in their currency? It doesn’t matter if it’s dollars or Swiss francs: In Projektron BCS, you can select any currency and use it for invoices to international customers.

For the complete control of project costs, the local currency is of course still at your disposal.

The flexibility of Projektron BCS also allows you to adjust the VAT rate and language of the invoice.

Individual solutions
Flexible invoice management in Projektron BCS. For instance, you can design your invoice directly in Projektron BCS, e.g. with a logo or individual header and footer. Moreover, you can format the text templates simply using the integrated rich text editor.

In addition, after you have exported an invoice, you can continue processing your data in other systems, such as SAP, or supplement your invoicing processes with individually configured dunning procedures.
Documents and contracts

Whether it’s for individual projects or throughout the company: Thanks to web-based access, systematic allocation and automatic version history, your documents are in good hands in Projektron BCS.

Easy management

With Projektron BCS document management, your project team has access to the relevant files in a uniform file structure. This facilitates not only cooperation within the team but also avoids unnecessary duplication of effort and storage space costs for duplicates.

New documents can be easily uploaded via drag and drop. Simply select the desired file repository in Projektron BCS, for example on the appointment, mark a file on your computer and drag it to your Projektron BCS. You can assign documents in any file format to tasks, projects and appointments as well as to persons and organizations.

If you load Microsoft Office files into your file repository, you can edit them directly in the browser. The version of the file will automatically be set to a higher number after saving.

When your email correspondence is imported in Projektron BCS, you can also store email attachments at the suitable structure element, for example at the project. This allows document management in Projektron BCS to support company-wide quality management.
Automatic version history

If you process or save a document, Projektron BCS automatically carries out a version history control for your file. This ensures that everyone works with the same status of a document. In addition, a blocking system prevents parallel changes and the storage and the version conflicts that would result. Transparency is also ensured by showing the version, storage date and processor of a document. You want to use an older version? Not a problem with Projektron BCS document management: Automatic version control ensures that all intermediate states of a document can be accessed via the central document archive.

Contract management

You always have an eye on your contracts thanks to the global contract list

Contract terms, cancellation periods and scanned contract documents can be quickly entered and conveniently managed with the contract management module. You can view all proportional costs for your current contracts and see their current status at a glance.

If a termination date is approaching, Projektron BCS informs the employee responsible by email and requests a statement. The employee responsible can call up the feedback function with a single click and can indicate directly in Projektron BCS how to proceed with the contract.
You want to search your documents for a tag? The convenient full text search of Projektron BCS is available almost everywhere, of course also within document management. If you browse PDFs, Microsoft Office documents and text files, you can even see the related sections of text in the hit list next to the file path and file name. Additionally, you can mark your documents with tags via metadata and thus further optimize your search.
**Access and processing rights**

Information security and data protection are particularly important when it comes to document management, which is why they are directly integrated in the administration of user permissions in Projektron BCS. This allows you to easily and safely define who may read, delete or update documents and directories.

**Read more:** „User permissions management“ on page 85.

**Web-based access**

![Direct access to your document management via Microsoft Explorer thanks to WebDAV](image)

You easily access all functions of document management via the user interface of Projektron BCS. Thanks to the web-based project management system, the data are of course also available to you while you are on the go.

In addition, Projektron BCS allows you to access documents in web files which are based on the WebDAV standard.

If your documents are located on a Microsoft SharePoint platform, you can even process, delete or block them with Projektron BCS.

**Read more:** „Interfaces“ on page 123.
Quotation preparation

You can quickly and precisely prepare quotations based on your plan data with Projektron BCS. The flexible quotation module also provides the best support, even on the international level.

From the planning stage to the quotation

The professional cost calculation in Projektron BCS not only supports your internal planning, but also serves as the basis for quotes. With just a few clicks, you can generate appropriate quote items from project structure elements such as tasks and task packages. Even description texts of tasks can easily be taken over.

Projektron BCS calculates the quotation price based on the external hourly rates, daily rates and article prices stored. If you want to offer services and materials that deviate from the stored default price, you can adjust this directly in the project. Even scaled prices and time-dependent sales prices can be stored.

You can grant discounts on individual quote items and, during negotiations with the customer, can quickly run through the figures on how these or canceled or additional quote items will affect your margin. If one of your customers receives a discount by default, you can record this centrally in the customer dataset so that it is taken into account in your quotations.

You can also add optional items to your quotation. The sales prices of optional items are not included in the quotation total.
International quotations

Once your quotation is complete, you can send it to your customer directly using Projektron BCS. The email is already prepared, the quotation is attached in PDF format, and additional files can be attached easily as needed. Of course, the format templates can be adapted to the individual quotation document.

Choose for international offers: Currency, language and value added tax

If your customers have their place of business in another country, you can have the quotation calculated in the corresponding foreign currency. To do this, you can use the centrally stored external hourly rates, daily rates and article prices. Even the VAT rate and language of the quotation text can be defined as needed.
Quotation wizard with approval process

From the master data to the individual quotation items to authorization: The quotation wizard will guide you every step of the way.

Data can be imported conveniently from the project planning as well as from the customer relationship management (CRM). This saves you the effort of looking everything up and re-entering it.

Additionally, a lean approval process is integrated directly in the quotation wizard. This enables the creator of the quotation to assign a reviewer, enter comments on the quotation and notify the reviewer through a reminder and by email if required.

Projektron BCS clearly displays all quotations to be approved by the reviewer in a list. With just a few clicks, the quotations can be viewed, approved or returned for post-editing with a change request.

Read more: „Customer relationship management (CRM)” on page 59.
From quotation to order

If your customer authorizes services you have offered, you can generate the corresponding order confirmation in the quotation wizard and send it to the customer by email if desired.

You can also generate the project order plan directly from within the quotation wizard. It maps the ordered quotation items and serves as a database for your project controlling.

Read more: „Project controlling“ on page 25.

Templates
The software allows you to add convenient standard formulations to the quotation itself, as well as to the cover letter. Frequently used articles can also be saved as templates in Projektron BCS and later added as quotation items, if necessary.

You can save your quotation layout directly in Projektron BCS, e.g. with a logo or individual header and footer. Moreover, you can format the text templates simply using the integrated rich text editor.

Once you have created a template for your order confirmations using the BIRT open-source report designer, you can also store it in quotations and reuse it as often as you like.

Read more: „Reporting“ on page 79.
Reporting

Current figures, facts and data prepared precisely and clearly: It doesn’t matter if it’s a standard report or an individual design – with Projektron BCS your reporting will be done according to your needs.

Standard reports

With just a few clicks, you can easily generate a large number of Projektron BCS standard reports for projects and companies.

With progress reports, status reports and cost reports for projects and complete project groups, you provide project managers and multi-project managers with the solid foundations they need to take decisions.

Your company also benefits from Projektron BCS standard reports in cooperation with external business partners: The project preparation report contributes to a common understanding of the project while proof of project and ticket expenses increase transparency and secure trust.

Even personnel billing is supported by Projektron BCS reporting – for example with expense reports and time recording.

For each Projektron BCS standard report, you have additional options with which you can, for example, adjust the assessment period in accordance with your needs.

Projektron BCS standard reports clearly compile important information about your projects.
Typical file formats
Whether it’s Microsoft Word or Microsoft Excel – whether it’s PDF or HTML: In Projektron BCS, you decide which typical formats your report is generated in.

Report orders

You want to regularly provide certain people with reports? With report orders with an integrated e-mail function, Projektron BCS can help you meet such requirements in a particularly efficient way. Using the handy wizard, you create all the necessary information regarding the report, the release intervals and recipients just once and then Projektron BCS takes care of the rest – completely automatically.

Individual reports
You want reports that are exactly tailored to your company? Thanks to the interface with the Open Source report designer BIRT, standard reports in Projektron BCS can be adjusted to your needs and completely new report types can be created.

This is because Projektron BCS data sets can be referenced in BIRT report templates in nearly any way you’d like and can be issued as text, lists, tables or as graphics. Even the layout of your reports can be customized for your company using BIRT report templates.

Once they are integrated into Projektron BCS, you can create reports as simply and conveniently with your own BIRT report templates just as you would with Projektron BCS standard reports.
Quality management

Quality management and project management work hand in hand with Projektron BCS – this is ensured by workflows, templates, checklists and various analysis options.

Process control and workflows

Projektron BCS offers you two options for software-aided control of your processes involved with the project business.

Thanks to system-controlled workflows you define individual workflow steps directly in Projektron BCS – including processing sequence and reaction times – and assign your employees. If it is your turn in the workflow as a processor, Projektron BCS will automatically inform what needs to be done and how much time you have for accomplishing it. After you have finished, the next employee will be informed accordingly – via e-mail and in Projektron BCS.

As an alternative, Projektron BCS provides you with a holistic solution with the integrated process engine from Activiti. In the Activiti Designer you model the processes according to BPMN 2.0 – the internationally accepted notation standard for business process models. You can define all activities in the process via the graphic program interface including the related process forms and assign the participating persons and person groups. The process models are available immediately after being uploaded in Projektron BCS and can be launched by mouse click.

Read more: „Interfaces“ on page 123.
Checklists

Did you think of everything? With standardized checklists, you can show known error sources and support your employees in efficiently improving quality. Projects, tasks, workflow steps and milestones: In Projektron BCS, you benefit from having our proven testing method in numerous places.
How to save time and increase quality at the same time? The templates in Projektron BCS make it possible: instead of having to create project structures for every new project, you and your employees can simply use the already defined templates again.

Such templates can also be applied to individual tasks or entire projects and a person responsible can be directly defined. This allows working in a structured, effective and quick manner. The template may also contain reusable workflows and checklists.

Additional templates ensure consistent quality across projects – for example in quotations, invoices, tickets, file repositories and reports.

Wiki integration
Have you already documented process descriptions, working instructions or similar things for quality management purposes? In Projektron BCS, you can make your know-how available in a context-sensitive manner - for example for a task. Time-consuming searches for required information become unnecessary, as Projektron BCS supports a large number of wiki software systems. Whether you have projects, tasks, workflows or persons, you can insert links to external or internal Wikis in almost any Projektron BCS objects.

Read more: „Reporting“ on page 79.

Evaluations
With different evaluation options, Projektron BCS supports you in examining your quality management measures.

If you use the Projektron BCS ticket system, you can easily gain important information for your quality management – for example regarding frequent product errors or response times for customer enquiries.

Your employees can directly enter how satisfied your customers are with the product and company in Projektron BCS customer management. The handy pop-up menus can be easily configured just like the related evaluations.


Documentation functions
Whether you’re in tasks, workflows or in projects – you can easily and quickly save your valuable experience in handy remark fields for future jobs.

Even project development can be efficiently documented in Projektron BCS. This allows you to contribute to well-founded process analyses and promote continuous quality improvements during the project work phase.

Read more: „Project execution“ on page 21.
User permissions management

Access rights and processing rights defined quickly and precisely: This issue is easily solved in Projektron BCS with role-based user permissions management and a clear permissions matrix.

Company-specific user permissions concept

Whether you have a small company or a large group: Thanks to flexible user permissions management, you can adjust the user permissions concept of Projektron BCS to the structures of your organization.

Directly after installation of the system, tried and tested standard roles are available to you. Whether you’re a managing director, project manager, employee or controller: In Projektron BCS roles, you will find typical areas of activities for all parties.

Standard roles are not sufficient? Not a problem with Projektron BCS: As the system administrator, you can adjust existing roles to your requirements or add completely new ones.

Read more: „Customizing“ on page 115.
Quick assignment and intuitive configuration of permissions

In Projektron BCS you can assign permissions quickly and flexibly: If you create a new user, the Projektron BCS wizard already has the necessary steps for the assignment of permissions at your disposal.

Any set of permissions that is defined once, such as for example the permissions of a project employee, can be used by other users without any problems simply by copying – as often as you’d like. If you assign employees to a department for the first time, they will also automatically inherit the standard permissions of said department.

Did your employee processes and functions change after restructuring measures? In the clear permissions matrix of Projektron BCS, you can adjust all the necessary permissions and roles with just a few clicks.

Targeted assignment of permissions

In Projektron BCS, you can assign permissions for selected projects and organizational units quickly and purposefully.

When you assign employees and person groups to a specific task or project, Projektron BCS will authorize the permissions in accordance with the activity. As a result, your employees have access to certain file folders, to the project calendar, or to process protocols.

When you assign an organizational unit, such as a department, to a line manager, such as a department supervisor, then he or she is able to edit internal employee data, approve leave requests or add new employees to his or her department.

You can also assign rights sets directly to user groups. All assigned employees will then receive the rights of the group. This enables uniform and cross-departmental rights management.

Assigning temporary permissions is also possible: If you name a deputy for a specific period of time, he will be granted the editing and viewing permissions necessary to take on your tasks.

Read more: „Resource management“ on page 50.

Access by external persons

You want to make use of freelancers for a larger project? With the differentiated assignment of access rights, you can effectively integrate external employees into projects. A freelance employee only sees the areas in Projektron BCS which they need for their work and accesses the relevant information on their behalf.

You may even grant access to selected project data to your customers via user permissions management. This way they are always up to date and can always get an overview of the progress of the project.
User permissions management
Project management methods

Our project management software supports you in working with recognized PM methods and standards such as IPMA (GPM), PMI, Scrum, PRINCE2, AutomotiveSPICE or Hermes.
Scrum

The agile project management method Scrum can be deployed quickly thanks to its simple structure and predefined roles. Scrum ensures flexibility and transparency. In Projektron BCS you digitally manage your Scrum projects and benefit from the complete toolbox of our project management software.

**Daily Scrum with adaptable task overview**

Projektron BCS supports you in the effective design of your Daily Scrum with a Task Overview which can be customized flexibly to your needs.

Projektron BCS clearly shows you the current processing status of your requirements and activities from your Sprint Backlog. Every team member can select an activity for processing or mark it as implemented with just one click. This serves as a reliable basis for the daily planning by your Scrum team.

A burndown chart with cumulative flow diagram, which displays the Sprint’s progress in a graphic, can also be integrated in the Task Overview. Projektron BCS visualizes the processing status for the requirements in color and displays the ideal chronological course of the Sprint as a reference.
In the integrated Scrum board, you can move individual activities from the user stories by drag & drop. Depending on which column you move your activities to, for example to Scheduled, Processing or Done, the status of the respective activity changes automatically. Colored markers distinguish which activities belong to which user story. You can adapt the board to your individual way of working with additional filter options and groupings.

Your team members are displayed above the board. Assign processors to activities quickly and simply using drag & drop. If you move a task back to “Scheduled,” assigned processors are removed directly. In the Scrum board, you can also use the Work in Progress limit (WiP limit) included in Kanban. If you select an employee, all activities that are scheduled or in progress which the employee is working on or is able to work are highlighted. You can use the Focus button to quickly move between the employee’s activities. When you click an activity, it receives the focus. This allows a targeted discussion of an activity during a Scrum meeting.
Product backlogs and user stories

From an Epic to User Stories and Partial Requirements to Activities and Acceptance Tests: You can structure and refine the requirements for your product in the Product Backlog of Projektron BCS.

You can also create, move by drag & drop and prioritize the required Scrum structural elements directly in the Product Backlog. Additional information on the structural elements of your Scrum, such as status, priorities and estimated values, can be maintained centrally in the Product Backlog.

Team members and product owners can communicate with one another directly on the user stories and epics. If there is a new message for you or your team, you will see this directly in your personal overview. You can call up the corresponding scrum element with just a few clicks and write your reply. The communication history and the most important changes are also directly displayed on the scrum element. This enables you to reconstruct what was discussed at a later time.
Sprint planning and sprint backlog

Prioritize User Stories with drag & drop and simply transfer them to the Sprint backlog

You are well prepared to start the Sprint Planning using Projektron BCS. Projektron BCS displays any outstanding Sprints of your Scrum-project in the Planning view of the Product Backlog. Using drag & drop, you can run through possible Sprint assignments and processing sequences of the User Stories. In this, Projektron BCS considers your team’s development speed (Velocity) as well as the estimated Story Points of your User Stories and informs you about any capacity bottlenecks.

Once you have established the targets for a Sprint, you can transfer the User Stories from the Product Backlog – using drag & drop – into the corresponding Sprint Backlog.

If you are working on a major Scrum project with more than one development team, the Planning view in the Product Backlog allows you to also clearly organize your User Stories in multiple, parallel-running Sprints.

Scrum wizards
Projektron BCS supports you with suitable wizards which guide you through the most important steps in your Scrum projects and sub-projects, if desired, when working with single Scrum structure elements.
Resource management
Projektron BCS makes it possible for you to reserve employee capacities for individual Sprints or for the entire Scrum project. How much free capacity is currently available can be checked quickly in the Resource Preview in Projektron BCS.

Read more: „Resource management“ on page 50.

Regularly scheduled meetings in the sprint calendar
Whether Sprint Planning, Daily Scrum, Sprint Demo (Review) or Sprint Retrospective: You can create regularly scheduled meetings for your Scrum team automatically in the Sprint Calendar. The dates created as a suggestion can be customized manually, for example when you want to invite additional participants or when the time changes.

Read more: „Teamwork“ on page 63.

Integrated time recording
Your Scrum team uses Time Recording in Projektron BCS to book their accrued efforts directly to the processed User Stories, Partial Requirements, Activities and Acceptance Tests.

Projektron BCS totals the booked times along the Product Backlog structure. As the Product Owner, you therefore know exactly how much effort was required, for example, for the implementation of a User Story or a product increment and if there were any relevant deviations between the estimated efforts and the efforts actually accrued.

If you also work with the Invoice module in Projektron BCS, you can easily invoice booked and project-specific efforts to your customers.

Read more: „Time recording“ on page 38.
**Ticket system**
If you work with the Ticket System of Projektron BCS, you can easily transfer product-related inquiries and customer inquiries to your Scrum projects.

For example, if a customer authorizes a new function via a ticket, you can create the corresponding User Story in just a few clicks and add it to a Product Backlog. Here, the ticket description can be easily adopted for user stories and activities. Projektron BCS links the new User Story with the original ticket, thus allowing an easy tracing of the creation history, for example when prioritizing the Product Backlog.

In addition, tickets can be linked to User Stories, Epics or Partial Requirements that already exist.

**Read more:** „Ticket system“ on page 44.
The process-oriented project management method PRINCE2, with seven predefined project phases and specific recommendations for action, offers a structured framework for your projects. You can simply map your PRINCE2 processes in Projektron BCS and support your project teams in high-quality standardized project work.

**PRINCE2 wizard**

Projektron BCS supports you in your work with appropriate wizards for the respective management phase of your PRINCE2 projects – from preparation all the way to the completion of a project.

The wizards can be customized to suit your needs. For example, you can create different wizards for PRINCE2 projects of varying sizes.

**Read more:** „Project planning“ on page 13.
Use of templates and learning from experience

Projektron BCS offers you the option of recording not only complete project structures but also individual tasks, checklists, or workflows as templates. These templates can be flexibly integrated in your projects.

By defining file templates, management products can be easily integrated into your PRINCE2 projects. This ensures that important products are not forgotten and are available across projects in a uniform layout.

Projektron BCS also allows you to simply record experiences collected in the current project or include previously recorded experiences from other projects in a new project.

Read more: „Project planning“ on page 13.

Quality register

![Quality register screenshot]

Specify your quality criteria in your quality register and see when the controls and approvals were carried out.

Record your criteria in a quality register for a high-quality project. Here, you can comfortably determine who is responsible for the review and acceptance of the quality criteria. You retain an overview during all phases of the project and are informed for the steering committee. Just as how you can define a responsible person on criteria, risk officers can be saved on risks.
As a project manager, you can specify the tolerance limits for your project values together with the steering committee. The tachometer in the project overview shows you exactly whether everything is still in order or if you need to discuss anything.
In which phase is the PRINCE2 project? The project phases are displayed easily recognizable in the schedule, their colors are conveniently specified by you yourself.

Read more: “Project planning” on page 13.

Specific resource management
In Projektron BCS, you can reserve employee capacities for individual work packages, project phases or for the entire PRINCE2 project. How much free capacity is currently available can be checked quickly in the resource preview in Projektron BCS.

Change management

The change management in your project works via the open items which members of the steering committee can see in their personal overview. You can escalate approvals and changes directly to the steering committee on tickets. The committee can review and accept the open items directly with one click.

You can also export your whole business case as a report.
Project roles

In your PRINCE2 project, the fixed project roles can also be displayed in a diagram. At a glance, you can see who the project manager is or who is involved in supporting the project. The organizational chart can also be used in reports and exports.
Graphical Network Map for Products

The graphical network map provides an overview of contiguous products in which blue arrows symbolize a predecessor-successor relation and gray arrows represent the hierarchy. Own relations can also be displayed. You can take a closer look at a product by clicking on it. The predecessor-successor relation is then shown in an even clearer form.
The IPMA project management model contains three competence fields designed to contribute to successful project management. Projektron BCS assists in mapping the fundamental requirements in many areas, thus simplifying all phases of project management.

Project objectives

Project objectives can be defined easily in Projektron BCS. Forms assist you in creating your specific main objectives and sub-objectives and you can keep an overall eye on things thanks to the dynamic objective hierarchy graphic.

Project environment and stakeholder management

The graphical overviews on project environment and stakeholder management virtually ensure the success of your project. A respective matrix shows you immediately which effects the environment and stakeholders have on your project.

Risk management

Projektron BCS supports risk management in all project phases, thus allowing the assessment of suitable countermeasures.

Projektron BCS provides support in form of two display options for the work breakdown structure: a tree view and the graphical display as an organizational chart. As a project manager, you’ll appreciate having both views at your disposal.

Read more: „Project planning“ on page 13.
The interactive Gantt chart in Projektron BCS can be customized with just a few clicks; and in addition to the critical path it shows you the project progress or the cross-project dependences of your project.

Read more: „Project planning” on page 13.
Resource load

Define which project participants and their respectively required efforts are needed for implementing your project and receive an overview as to whether this can be planned without any work overloads for the project participants. Projektron BCS will show you any potential resource conflicts or resource bottlenecks per project. Whether you now carry out a resource-based date calculation or opt for your own solution options, Projektron BCS supplies the relevant decision-making parameters.

Read more: „Project planning“ on page 13.
Various reports can be sent to your project management office or steering committee automatically via report orders to ensure that everyone involved in the project is up to date.

Read more: „Reporting“ on page 79.
Phase schedule for the project management office

You can use milestones to mark the phase transitions within your project. Projektron BCS visualizes these phase transitions in the Gantt chart and schedules. The multi-project overview shows you the current phases of your project at a glance.

Read more: „Project planning“ on page 13.
Hermes

The open Hermes method serves for implementing projects in information and communication technology in a unified and structured way. You want to implement projects with Hermes? Projektron BCS supports you every step of the way.

Projects from templates

A wizard allows you to easily create templates for projects in Projektron BCS – this way you can create specific scenarios for your Hermes projects in advance. In addition to tasks, workflows, checklists and even planned data can be saved here. When the time comes, you can select your scenario from the templates and save time in the preparation of your project.

Read more: „Project planning“ on page 13.
Define the central phases you need for your Hermes project. This enables you to see the phase your project is in at a glance. The milestones serve as quality gates, as the status of the project and further steps are examined here.

Read more: „Project planning“ on page 13.

Workflows and checklists

Workflows and checklists are indispensable for the structured implementation of a project. Projektron BCS supports you with system-controlled workflows: Here, you define the processing sequence and reaction times and allocate them directly to employees or placeholders. With checklists, you support your employees and ensure the project’s quality. You can also rely on predefined templates here.

Read more: „Quality management“ on page 81.

Hermes and Scrum

Hermes itself offers a module for agile development; for example with Scrum. Thanks to its simple structure and predefined roles, Scrum can be implemented quickly in Projektron BCS and ensures flexibility and transparency. Benefit from the extensive options of Projektron BCS and combine both project management methods.

Read more: „Scrum“ on page 90.
Unified role models
Meeting your requirements: Flexible permissions management in Projektron BCS allows your system administrator to create the necessary roles for your Hermes project with ease. You then determine the permissions for the individual roles yourself.

Read more: „User permissions management“ on page 85.
Customizing

Projektron BCS – highly adaptable
Customizing

From the scope of functions to business logistics and corporate language to corporate design: Projektron BCS can be exactly customized to your company-specific requirements.

Business logic

Workflows suitable for your processes – entry fields for all the important data – roles and permissions adjusted to your needs: In Projektron BCS, you can show exactly how tasks are carried out in your company.

Whether individual fields or complete views, depending on the requirement you, as administrator, can switch individual BCS modules on or off on the user interface.

Project and process managers can create workflows and checklists with just a few clicks. Once they are saved as templates, workflows and checklists can also be reused.

Even permissions and roles can easily be adjusted to your company via a matrix. And if the right roles are not available by default, you can simply add new ones.

Experienced Projektron BCS consultants will gladly support you in these important tasks with the appropriate training measures and workshops. Of course, our experts can also gladly do all of the necessary adjustment for you.
User-defined settings

Adjusted views for everybody: show and hide objects in accordance with your requirements

Our project management software is defined by you – with just a few clicks: Each view you open in a Projektron BCS working area is loaded in a separate tab within the software.

You can arrange the views your tabs in any desired order using Drag & Drop. And: If you want to save the most important tabs in your user profile permanently, just pin them to the working area.

In addition, you can show, hide and store your settings for individual objects such as fields and table columns as required in virtually all Projektron BCS views. Do you have an individual setting that you would like to share with the team? Your administrator can simply copy individual settings for certain people or provide them globally to all people in the team.

Whether it’s the contact history for important stakeholders or your team members’ calendars: With personal bookmarks, you can quickly switch to frequently used records in Projektron BCS.
You want a project management software program that perfectly fits your company visually too. This is easy thanks to how adjustable Projektron BCS is: As an administrator you can easily exchange the wallpaper for the web-based project management software.

We will even design the interface of Projektron BCS according to your design specifications. Of course, you can also adjust the design yourself – and in our administrator training seminars, we’ll show you how.
Corporate language

What is it called again in the new system? Very often, certain terms establish themselves in a company over the years.

To ensure that your employees find their way around your new project management software, our experts will adjust the interface terms to your company on request. In our administrator trainings, we will show you how you can independently adjust the interface to your corporate language.
Language versions

German is not your corporate language? No problem – Projektron BCS and Projektron BCS. start are available in six additional languages:

- English
- French
- Spanish
- Italian
- Dutch
- Hungarian
- Polish

Please talk to our customer service about the various language versions.
Interfaces

Thanks to versatile interfaces, Projektron BCS almost seamlessly integrates into your IT environments and allows for synergy effects across applications.
Interfaces

**JIRA**
The JIRA plug-in for Projektron BCS enables you to integrate, evaluate and invoice JIRA data for your Projektron BCS project.

**Import-Export-Module**
The freely configurable Import-Export module by Projektron BCS enables exchange with almost any system.

**Confluence and wiki software**
Be it Confluence or another wiki software: You can easily interlink Projektron BCS and your wiki using links to provide information in a context-sensitive way.

**Version management with log**
The e-mail import automatically transfers changes in a subversion repository to Projektron BCS.

**Logs and exchange formats**
Be it a connection to an email server, data exchange with calendar software or single sign on, standardized formats and logs make communication easy.

**Time recording via app**
Record working hours on a project-specific and task-related basis: With the Projektron BCS app, the hourly booking via the smartphone is quick and easy.

**Microsoft**
Whether you have Microsoft Office applications, the ERP Microsoft Navision or server solutions such as Microsoft Exchange and SharePoint: Projektron BCS goes hand in hand with your Microsoft environment. The Microsoft Office applications such as Excel, Word, PowerPoint and Project are also compatible with BCS.start.

**BPM Platform and modeling tools**
From simple Mind Map tools all the way to the platform for business processes (BPM) Projektron BCS provides you with suitable interfaces.

**SAP**
SAP systems are known for their flexibility and so are we: With our flexible import/export module, we create Projektron BCS interfaces suited to your SAP system.

**Telephone systems (CTI)**
Call at the click of a mouse: Via our interface with the TeamCall Telephony Access platform from ilink, we can connect Projektron BCS to your telephone.
Reporting tools
Whether you need individual report designs or you just have high standards for creating reports: Projektron BCS is ideally equipped thanks to interfaces connected to Eclipse BIRT and TRADUI SAMURAJ.

Web services
Exchange data quickly and flexibly via the web: Projektron BCS allows you to connect your systems to SOAP web services.

Time recording terminals
Data from time recording terminals can be automatically transmitted to Projektron BCS using an import processor.

IBM
You work with IBM Lotus Notes and Domino? Projektron BCS does too – even with bidirectional synchronization.

DATEV
Send your invoices to your tax consultant. You can easily send your invoice and point-of-sale data with the DATEV interface from Projektron BCS.

Conference systems
Via our interface with conference systems such as Adobe Connect, you can simply and directly take part in web conferences via the Projektron BCS calendar.
Editions

From small business entrepreneurs to medium-sized businesses all the way to companies active around the world: Projektron BCS and Projektron BCS.start provide you with the right solution.
Editions

**Projektron BCS.start**
The particularly inexpensive edition is targeted at project teams with up to 15 employees. Equipped with professional project management tools and helpful support functions, Projektron BCS.start handles important work processes – from the offer to the invoice.

**Projektron BCS**
Comprehensive tools for projects and companies are united professionally in one software by Projektron BCS. Individually scalable and with a wide range of customizing options, the main product by Projektron can be adapted easily and in accordance with your company’s requirements. Projektron BCS is comprehensively equipped – even for major international projects with a flexible selection of currencies and up to seven language versions.
## Project management

<table>
<thead>
<tr>
<th>Feature</th>
<th>Projektron BCS</th>
<th>Projektron BCS.start</th>
</tr>
</thead>
<tbody>
<tr>
<td>Structure planning, time planning, efforts planning &amp; cost calculation</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Document management and project documentation</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Project controlling and reporting</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Earned value analysis, Milestone trend analysis</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Project preparation (objectives, environment, stakeholder and risks)</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Additional planning methods (top-down and reverse)</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Scrum support</td>
<td>![ ]</td>
<td>optional</td>
</tr>
<tr>
<td>PRINCE2 support</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Incoming invoices</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Project team-time recording</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
</tbody>
</table>

## Multi-project management

<table>
<thead>
<tr>
<th>Feature</th>
<th>Projektron BCS</th>
<th>Projektron BCS.start</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi-project controlling with project groups</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Cost accounting (cost types, cost centers, cost bearers)</td>
<td>![ ]</td>
<td>optional</td>
</tr>
<tr>
<td>Portfolio management, cross-project milestones</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Project control center</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Project phases</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
</tbody>
</table>

## Time recording and work organization

<table>
<thead>
<tr>
<th>Feature</th>
<th>Projektron BCS</th>
<th>Projektron BCS.start</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record times</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Offline time recording</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Tickets</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Expenses</td>
<td>![ ]</td>
<td>optional</td>
</tr>
</tbody>
</table>

## Personal work organization

<table>
<thead>
<tr>
<th>Feature</th>
<th>Projektron BCS</th>
<th>Projektron BCS.start</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reminders</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Bookmarks</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Personal settings</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Appointment calendar</td>
<td>![ ]</td>
<td>![ ]</td>
</tr>
<tr>
<td>Resource management</td>
<td>Projektron BCS</td>
<td>Projektron BCS.start</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Workload analysis, working hours accounts and leave planning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Precise resource scheduling, resource demands</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Skill management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work schedule</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quality management</th>
<th>Projektron BCS</th>
<th>Projektron BCS.start</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wizards, templates, checklists and workflows</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ticket system</th>
<th>Projektron BCS</th>
<th>Projektron BCS.start</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticket system</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Release limits</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service quality (SLA)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quotation preparation</th>
<th>Projektron BCS</th>
<th>Projektron BCS.start</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard article</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Checking process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Order confirmation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>More functions</th>
<th>Projektron BCS</th>
<th>Projektron BCS.start</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer relationship management (CRM)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract management</td>
<td>optional</td>
<td>optional</td>
</tr>
<tr>
<td>Applicant management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Invoicing</td>
<td>optional</td>
<td></td>
</tr>
<tr>
<td>Process management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BPM platform and modeling tools</td>
<td>from version 19.3</td>
<td></td>
</tr>
<tr>
<td>Multi-currency capability</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Language versions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Default system language is either German or English.*
<table>
<thead>
<tr>
<th>Interfaces</th>
<th>Projektron BCS</th>
<th>Projektron BCS.start</th>
</tr>
</thead>
<tbody>
<tr>
<td>JIRA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Import-Export-Module</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wiki software (e.g. Confluence)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Version management (e.g. Subversion)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allowance recording via app</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile time recording via app</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Export to Microsoft Excel, Word, PowerPoint, Project</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Microsoft Office 365</td>
<td>additional licenses</td>
<td>additional licenses</td>
</tr>
<tr>
<td>Microsoft Exchange</td>
<td>additional licenses</td>
<td></td>
</tr>
<tr>
<td>Microsoft Active Directory (via LDAP), SharePoint,</td>
<td>configuration</td>
<td></td>
</tr>
<tr>
<td>Outlook, Dynamics NAV (Navision)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAP</td>
<td>configuration</td>
<td></td>
</tr>
<tr>
<td>Telephone systems (CTI)</td>
<td>additional licenses</td>
<td></td>
</tr>
<tr>
<td>Reporting tools (BIRT)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Web services</td>
<td>additional licenses</td>
<td></td>
</tr>
<tr>
<td>Time recording terminals</td>
<td>configuration</td>
<td></td>
</tr>
<tr>
<td>DATEV</td>
<td>configuration</td>
<td></td>
</tr>
<tr>
<td>Conference systems (e.g. Adobe Connect)</td>
<td>configuration</td>
<td></td>
</tr>
<tr>
<td>External connection of DMS via WebDAV</td>
<td>configuration</td>
<td></td>
</tr>
</tbody>
</table>
Projektron BCS
BCS stands for Business Coordination Software. Comprehensive functions – individual customization – reliable technology: The web-based Projektron BCS represents quality, efficiency and transparency in projects and companies.