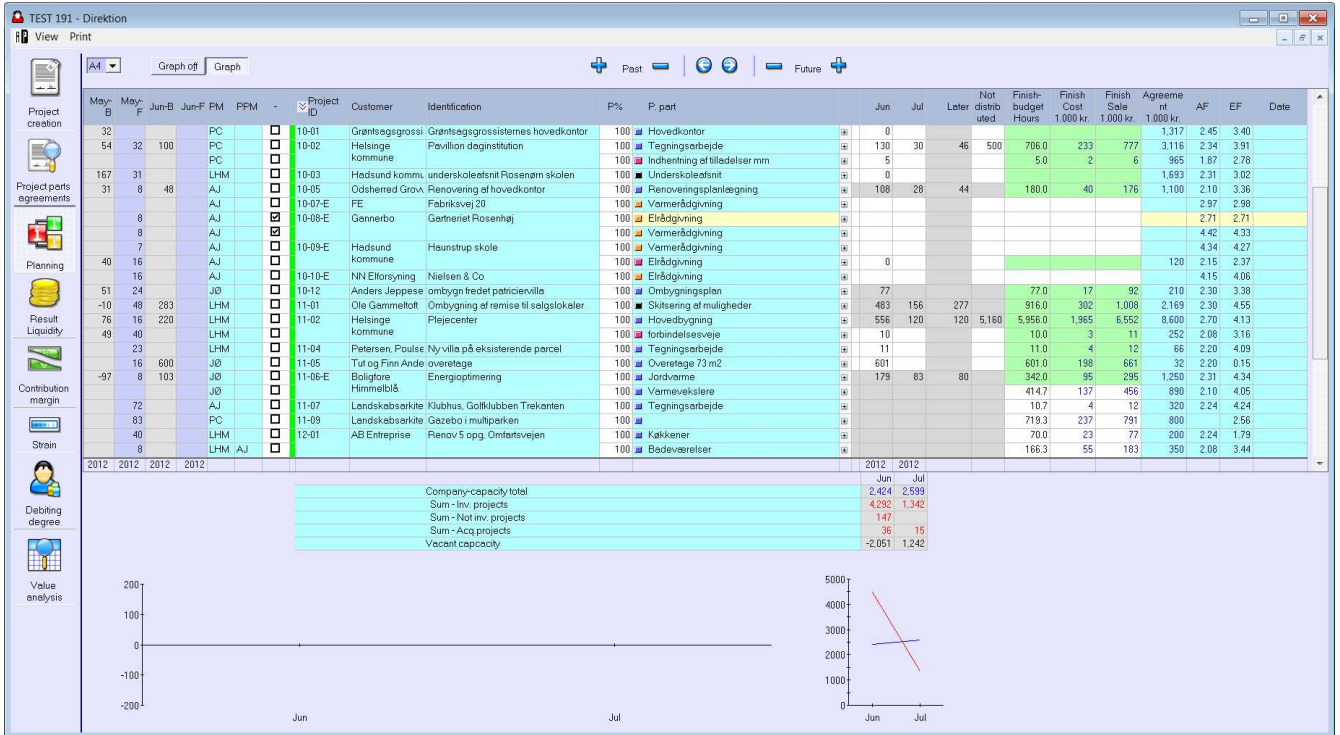


4.1 The planning interface

The central planning interface contains all open project parts:



The planning interface displays the past on the left, and the future on the right.

Planning is done in months. Each column shows a month.

The top row of +/- buttons will add or remove months.

Note: the current month is both past and future. On the left hand side (past) you'll see what's been spent during the month. On the right hand side (future) you'll see the hours remaining for the current month according to your budget.

The project parts can be expanded to show activities, and people assigned.

Columns

Below we'll look at the different column groups and what each column contains. Some columns are mandatory and always on, while some are optional and accessed through the [View] menu.

Columns can be divided into:

1. Past
2. Project identification
3. Remaining budget (future)
4. Project revision

4.1.1 Past

Columns in this group show consumed hours on the different project parts. Add or remove months using the +/- buttons at the top.

The number of project parts varies, according to the months shown. By default you'll only see open project parts, but you'll also see closed project parts that have received registrations in the shown period in the past.

4.1.2 Project identification

The center of the planning interface contains the project identification columns.

PM	The project manager's initials.
PPM (optional)	The project part manager's initials (if enabled by the AutoPilot Administrator)
Favourites (optional)	Check boxes where you select which projects to include in a report/print.
Status	<p>Colour coding: Green = open project part Red = closed project part</p> <p>Closed project parts will be displayed, if the past columns contain any registrations.</p> <p>If you've expanded the project part to show the underlying activities, the colour coding means:</p> <p>Green = open activity Yellow = activity is closed in advance Red = closed activity</p> <p>For more, see section 4.4.2.</p>
Customer	Shows customer name.
Identification	Shows project name. If expanded, activities and employee are also shown here.
P% (optional)	Enter the probability (percentage) of a prospect becoming an agreement. For more, see section 4.3.
P. Part (optional)	Shows project part name.
Expand + and -	<p>The expansion column toggles between [+] and [-] depending on whether or not the row in question is collapsed or expanded.</p> <p>There are four levels of expansion: project part, activity, employee and other assignments of the employee.</p>

The date following the employee, shows when that employee last handed in her timesheet.

<Ctrl+o> Expand all project parts to activity level

<Ctrl+p> Expand all project parts to employee level

<Ctrl+i> Collapse all project parts

4.1.3 Remaining budget (future)

Remaining budgets figure either time distributed in the month columns, or as a sum in the "Finish-budget Hours" column. Following is a description of the budget columns:

Month columns	Used if you're distributing your budgets in time. The background colour indicates where budgeting has been done: if the cell is gray, the budget can be found (and edited) further down, by expanding.
Later	Any future budgets not displayed in the current view are added together and displayed here.
Finish budget hours/cost/sale (optional)	Shows the sum of the remaining budget in hours, as well as the sales and cost price. If the budgets are on an employee level, employee cost is calculated using that employee's invoicable cost noted in the price list system. If the budgets are on activity- or project part level, cost is calculated using the average cost, noted in Basis > Emp. prices > Special budget prices. Sales prices are calculated in the same way as cost. If the budgets are on an employee level, the relevant employee's sales price is used. AutoPilot can, optionally, calculate employee sales prices as cost x ambitious factor. Must be configured by the AutoPilot administrator.
Consumption hours/cost/sale (optional)	All three columns are optional. They show the total consumption, divided into hours, cost price and sales price.
Budget hours/cost/sale (optional)	Show the total budget for the project; i.e. the sum of total consumption so far and remaining budgets.

4.1.4 Project revision

Columns are used to control the project part, regarding consumption plus remaining budget compared to the agreement.

Agreement 1000 £. The amount of money set aside in the agreement to cover your internal hours.

Number shown is in 1000 £.

The entire agreement can be maintained under "Project parts agreements".

AF Ambitional factor

Describes the management's expectation of which factor our work will produce.

Fixed price projects: Enter AF on the project parts card. AF is used to calculate the nominal sales price of the hours produced, as well as calculate the hour value for use in Value Analysis.

By the hour: AF is the ratio between the total cost price and the total sales price of all hours handed in on the particular project part.

EF Expected final factor

Fixed price projects: EF is the part of the agreement set aside to internal hours, divided by the total budget cost (consumption + remaining budget).

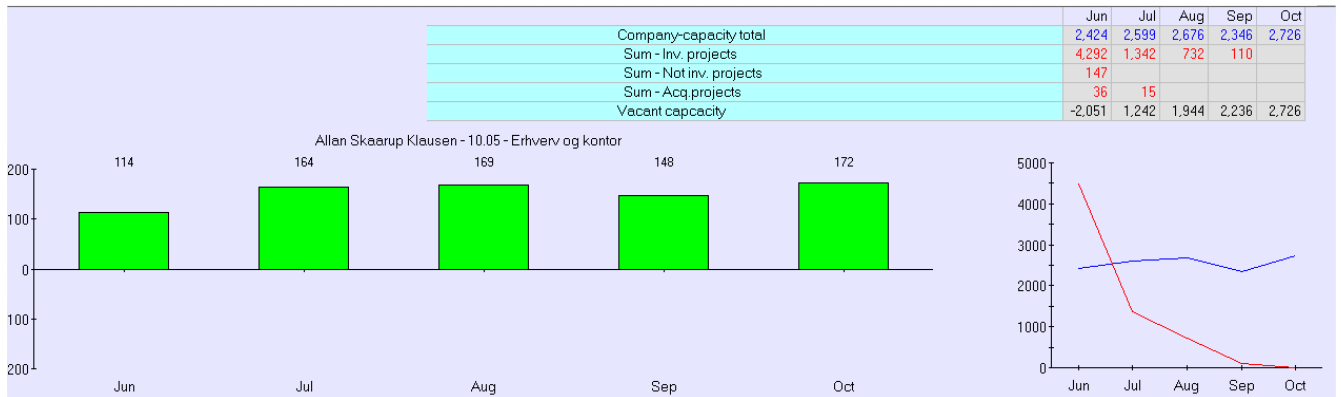
By the hour: EF is calculated as the sum of:

$$\frac{\text{Invoiced internal hours} + \text{sales price of non-invoiced hours} + \text{sales price of remaining budget} - \text{sum reserved for non-billable expenses (if any)}}{\text{Cost price of the total budget}}$$

4.1.5 Capacity

Your capacity overview is made up of:

- A table displaying monthly amount of standard hours and a monthly sum of all budgets
- Chart of a given employee's capacity not yet budgeted
- Two graphs comparing the sum of standard hours to the budget sum



The table

Shows sum of standard hours and budget sum for the entire company.

Blue numbers are the sum of all employees’ standard hours in a given month. Standard hours stem from the individual employee contracts.

Red numbers are the total budget for the given month, divided into invoiceable, non- invoiceable and acquisition.

Black numbers are the capacity not yet budgeted for the given month; i.e. the gap between total capacity and the total budget.

Excess capacity for employee XX

Click an employee to display the histogram. The histogram illustrates the employee’s capacity not yet budgeted for the given month.

Negative/red numbers indicate a lack of capacity.

Capacity charts

The red graph: Budget for the period.

Blue graph: Total standard hours.

The distance between the two is the capacity gap for the period in question.

4.2 Create and revise budgets

Budgets can be as detailed as you want them to. As the project progresses you should revise your budget. The budget has two dimensions:

- Vertical (project part/activity/employee)
- Horizontal (month/sum total)

The least detailed budget is a single sum on a project part, while the most detailed budget shows how much each employee is expected to work on the individual activities distributed in time.

Budgeting in high detail provides a greater amount of information (about project status, expected final factor and company capacity).

Identification	P%	Jun	Jul	Aug	Sep	Oct	Later	Not distrib uted	Finish- budget Hours	Finish Cost 1.000 kr.	Finish Sale 1.000 kr.	Agreeme nt 1.000 kr.	AF	EF
Ungdomsboliger og kollegie	100	230	170	100	80				580.0	166	696		3.73	5.25
	100	367	126					790	1.282.5	396	1.382	17.250	2.15	5.19
	100	819	500					4.000	5.319.0	1.755	5.851	24.625	2.30	3.20
Udvikle typehus	100	300							300.0	99	330	810	2.18	2.92
Patienthotel	100												2.30	2.35
	100								1.445.5	477	1.590	3.500	2.40	3.67
Hospice	100	60						20	80.0	26	88	1.564	2.40	2.51
Sæmmenslutningskontor	100	348	129	95					572.0	165	554	8.652	2.27	4.34
	100	8						1.100	1.108.0	366	1.219	10.892	2.20	3.03
Tilbygning til kontor	100												2.71	2.72
Grøntsagsgrossisterens hovedkontor	100	0										1.317	2.45	3.40
Pavillion daginstitution	100	130	30	46				500	706.0	233	777	3.116	2.34	3.91
	100	5							5.0	2	6	965	1.87	2.78
underskoleafsnit Rosenørn skolen	100	0										1.693	2.31	3.02

As the project progresses, budgeted hours will become consumed hours. The budget for the current month is automatically reduced by the hours handed in by the employees. At the beginning of a new month any remaining budget is automatically added to the current month.

To create a budget on a project part, enter the hours or amount (GBP) you expect to use, in the column Finish Budget Hours (enter hours) or Finish Sale (enter amount). The numbers in the other two columns are calculated automatically.

10-02	Helsingø kommun	Pavillion daginstitution	100	130	30	46			500	706.0	233	777	3.116	2.34	3.91
		Forprojekt													
		Hovedprojekt													
		Tilsyn													
10-02	Helsingø kommun	Pavillion daginstitution	100	5					5.0	2	6	965	1.87	2.78	
10-03	Hadsund kommun	underskoleafsnit Rosenørn skolen	100	0								1.693	2.31	3.02	
10-05	Odsherred Grov	Renovering af hovedkontor	100	108	28	44			180.0	40	176	1.100	2.10	3.36	
10-07-E	FE	Fabriksvej 20	100										2.97	2.98	
10-08-E	Gærrerbo	Gærneriet Rosenhøj	100										2.71	2.71	
			100										4.42	4.33	

The money to hour ratio is determined by your settings. You can set a general cost price per hour and a general sales price per hour. If you are budgeting on the employee level, AutoPilot uses the price list system.

If AutoPilot has been configured to do so, the nominal sales price value on fixed price projects, will be calculated as hour cost x the AF of the project part.

4.2.1 Exceeding the budget

If you're over budget, a red border will surround the negative number. A yellow exclamation mark will appear next to the particular employee, activity or project part.

Region Syd	Patienthotel	100											2.30	2.35
		100							1.445.5	477	1.590	3.500	2.40	3.67
	Adgang for handicappede								-56.5					
	Tegninger								375.0	124	413			
	Lydisolering								232.0	77	255			
	Tekniktilkobling (ilt mm)								310.0	102	341			
	Nødkald og telefonanlæg								331.0	109	364			
	Skyllerum/hygiejne								254.0	84	279			
Region Midtjylland	Hospice	100	60					20	80.0	26	88	1.564	2.40	2.51
BDF	Sæmmenslutningskontor	100	348	129	95				572.0	165	554	8.652	2.27	4.34

When summing the total budget for a given period, any hours exceeding the budget, on any level, are excluded.

Including them would increase the excess capacity of the individual employees, by the amount they've exceeded, which of course doesn't happen in the real world.

This fact might make the sums seem odd, because the sum total doesn't add up to the individual numbers.

Therefore, please address any hours that go over budget, thereby eliminating all red borders and yellow exclamation marks. Doing so will let you maintain your focus.

If there are any exclamation marks by an activity or employee, it may be that you're ahead of your budgets. If so, enter a 0.

Every month, you should assess the remaining budget, compared to the stage of the project, and correct the numbers accordingly.

4.2.2 Active budget area

When you enter numbers in the planning interface, other cells will turn grey, while the cell area you're working with will remain white. The white area is your active budget area.

You can change the level of detail for your budget by right clicking on the area you want, and clicking [Set budget-area here].

When changing the level of detail for existing budgets, you'll see a yellow row containing the previous sums. Distribute these on the new level, while comparing to the old budget.

Remove the yellow row by clicking [-].

Note: the original budgets are deleted from the database as soon as you click [Set budget-area here], making it crucial that you enter the new numbers correctly, before removing the yellow line. Closing the window or entire program, will wipe out the data in the yellow line.

4.2.3 Move budget 1 month forwards/backwards

Budgets can be shifted backwards or forwards in time. Right click and select [Move budget 1 month forwards] or [Move budget 1 month backwards].

Doing so will shift **ONLY** the numbers in the specific row and column you click. Only hours on, and below, a given row will be shifted.

For example: if you click on the employee level and move the budget, only the budget for the employee in question will be affected.

If you click on the activity level and move the budget, you'll be moving the budget for all employees working on the activity in question.

Clicking the project part, will move **ALL** underlying budgets.

Also note, that only budgets after the current month, can be moved.

4.3 Acquisition and probability percentage

A project part can be configured to act as an “acquisition project” (do so on the project part card).

Doing so will make the project part appear at the bottom of the list in Project parts agreements, and the Planning interface, with a yellow background.

Acquisition projects can be assigned a probability percentage, describing the probability of the project resulting in a solid agreement.

Acquisition projects act like regular projects, with a few minor exceptions.

In the planning interface you’ll see acquisition projects summed by their remaining budgets, according to their probability. This will make a 50% likely project, budgeted for 80 hours, appear as 40 hours.

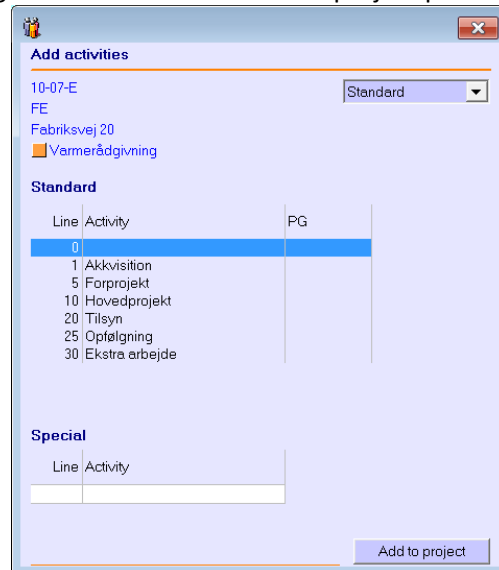
4.4 *Creating and maintaining activity plans*

Basically, all costs on a given project are assigned to an activity.

The activity plan on a given project part provides you with a framework for controlling the different stages of the project part. We recommend that you create an activity plan, dividing the economy of the project part into the proper activities/stages.

4.4.1 **Creating an activity plan**

Create an activity plan by adding one or more activities to a project part.



Right click a project part and click [Add activity].

You can add one or more of the predefined activities from the standard activity plan, or create your own. To create your own activity, enter line number and activity name. Do this at the bottom of the window (under the heading “Special”).

Click [Add to project] to add the activity to the project part. A newly added activity will automatically be open to registrations.

To delete an activity, right click it and then click [Delete activity]. Doing so is only possible if no costs have been registered, and if no budgets have been created, for that particular activity.

4.4.2 **Maintaining an activity plan**

To make sure that costs are assigned correctly, only open the necessary activities to registration.

By using [Edit activity plan] or <Alt-Q> you can customize which activities are open to registration.

Activity plan

11-07

Landskabsarkitekterne ApS
Klubhus, Golfklubben Trekanten

Tegningsarbejde

Amounts in whole thousand

Agreemer	320
Distributec	0
% sum	0

Line	Activity	Agreement%	Agreement	Payer	Price group
5	Forprojekt				0
10	Hovedprojekt				0
20	Tilsyn				0

5 Forprojekt

Choose either:

- ◆ Close in advance (yellow)
- ◆ Allow handing in hours (green)
- ◆ Close for handing in hours (red)

4.4.3 Close in advance

When an activity isn't due to be executed for some time, it might be a good idea to close it in advance. Doing so will allow you to add people and budgets to the activity, but nobody will be able to register hours on it.

To close an activity in advance, select it on the list, and click the yellow light bulb.

4.4.4 Closing

When the work is done, close the activity.

To close an activity, select it on the list, and click the red light bulb.

Closing an activity means it becomes unavailable for hour registrations, and any remaining budgets are deleted.

The activity will be closed for further registrations, and the background colour on the time sheet changes to red.

After three weeks the activity disappears entirely from all timesheets, and becomes unavailable for self-allocation.

4.4.5 Opening

To open an activity, select it on the list, and click the green light bulb.

The activity is added to the timesheet of every employee assigned to it.

4.5 Assigning people to activities

Once the activity plan has been created, you can begin assigning people to the activities.

4.5.1 Assigning people

Assign somebody to an activity by right clicking the activity and selecting [Add Employee]. You'll see the [Add employee] window:

The screenshot shows the 'Add employee (Ctrl-Insert)' window. At the top, there are navigation arrows and a 'Group' dropdown menu set to 'Entire company'. Below this is a table of employees:

Init	Name	Dep.	Location
ABL	Anders Blankgaard	Stort og	Årh
AJ	Aksel Jespersen	Erhverv og	
ASK	Allan Skaarup Klausen	Erhverv og	
BOK	Bettina Overgaard Knak	Stort og	Årh
CRO	Carl Robert Ovesen	Parcelhuse	
DEU	Dennis Ubberup	Stort og	
HP	Henrik Prinds	Erhverv og	
JPJ	Jens Peter Jensen	Parcelhuse	Årh
JØ	Jan Østergaard	Stort og	
KN	Kirsten Nielsen	Stort og	
LH	Lars Hansen	Erhverv og	
LHM	Lene Humlum	Parcelhuse	
MDF	Mads Dorn Frederiksen	Parcelhuse	Årh
PC	Per Caspersen	Parcelhuse	
TAL	Thomas Arbom Laursen	Parcelhuse	Årh
TST	Torben Skjørring Tegnbaek	Erhverv og	Årh
WP	Werner Persson	Stort og	
X-ARK	xArkitekt.		
X-KON	xKonstruktør.		
X-TEKN	xTeknisk assistent.		

On the right side of the window, there are two bar charts. The top chart is titled 'Anders Blankgaard' and shows time budgeted from June to November. The bottom chart is titled 'Entire company' and shows time budgeted from June to November. Both charts have 'Graph off' and 'Graph on' buttons above them.

Select which employee to add. Alternatively, employees can self-allocate, using their timesheet.

The columns on the top right show the time not yet budgeted for the selected employee.

The columns on the bottom right show the time not yet budgeted for the company as a whole.

To add the selected employee double click or press <Enter> in the list.

Ordering

The employee list can be ordered by employee groups using the dropdown list at the top. The columns on the bottom right will change accordingly.

An employee belonging to several different groups can appear on multiple lists.

4.5.2 Removing people

Remove somebody from an activity by right clicking the employee and selecting [Remove Employee] or by using <Ctrl+Delete>.

An employee can only be removed if that person hasn't registered any hours, and isn't budgeted to work on the activity.