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2.05.04 Capacity Evaluation

The capacity evaluation contains the resource evaluations (utilization and capacity overviews) and the calendar evaluations (overviews of absences such as vacation, illness, ...).



The mask consists of the following elements:

1. Name

- **Name:** In this field the name of the evaluation is defined if it is to be saved (for example, for [time services](#) or to manage the evaluation results).
- **Evaluation:** The capacity evaluation contains the following evaluations:
 - Capacity Utilization Overview I, II and III
 - Capacity Evaluation I, II and III
 - Calendar Overview I and II
- **Report Compilation:** In this field the new report compilation can be selected.

2. Input Data

- **Professional Search:** This selection box allows you to use professional searches for the input data of the evaluation. However, these professional searches must refer to the supported categories.
- **Search Engine: Quick Search and Category:** This element is used to filter the selected data from the categories. The document categories Work package, Employee, Project, Activity and Unit are available for selection. The operation of the search engine is also described in section 3.02.3 and can be executed several times here if necessary.
- **Input Data:** This field lists the selected selection criteria for the evaluation. This input data can come from the professional search, the standard search engine or the personal file.

3. Main Parameters

- **Evaluation Period:** This selection box refers to the evaluation period (Start and End elements) and allows a parameterized definition of the period for the time services. This selection (Current week, Current month, ..., Next week, Last week, ...) can also be used to simplify the manual definition of start and end.
- **Start and End:** In these fields, you can enter a time interval as a selection criterion to limit the analysis period for the evaluation.



4. Other Criteria

- **Cost Center:** In this selection box you can choose cost centers as selection criteria. These cost centers refer to the employees' cost center and restrict the selection of the employees considered accordingly (only employees assigned to this (these) cost center(s) are displayed).
- **Project Type:** In this selection box, you can choose project type as a selection criterion. These types refer to the category of the project and restrict the selection of the project accordingly (only projects assigned to this (these) project type(s) are displayed).
- **External Order:** This selection refers to the external indicator of the project and restricts the selection of the project accordingly (only external projects are displayed).
- **Operation:** This selection refers to the operation indicator of the project and restricts the selection of the project accordingly (only projects for which the checkbox is set are displayed).
- **Period:** This selection box is used in the capacity evaluation to define a period (weekly, monthly, ...) for the consideration of the capacities for the selected employees.
- **Highpoint on the Scale:** Here you can specify the highest point of the scale.
- **Display of Capacity in:** This selection controls the display form of the capacity. Possible displays are in %, h or Pt.
- **Project Status:** This selection filters the corresponding status of the project. Only projects of selected statuses are displayed.
- **Upper Utilization Limit:** This selection controls the upper utilization limit, above which a colored highlighting in red takes place.
- **Lower Utilization Limit:** This selection controls the lower utilization limit. All workloads that are smaller than the entered value are displayed in green in graphical views.
- **Workload Grouped on Projects:** This checkbox controls the display of the evaluation in relation to projects, work packages and activities. If the checkbox is set, the workloads are displayed per project and no longer per work package or activity.
- **Surpress AP Details:** This selection controls the display of the evaluation at activity or work package level. If the checkbox is set, the activities are displayed.
- **Display Absences:** If you check this box, absences will be displayed.



5. Settings for View

- **Width:** This field defines the width in pixels (px) of the graphic evaluation.
- **Height:** This field is used to specify the size of the font in points (pt) for graphical evaluation.
- **Line Height:** Here you can specify how high your line height should be.
- **With Illustration:** With the help of this selection, in addition to the lists, graphics for some evaluations can be generated.
- **Display:** With the help of this selection the generated evaluation can be generated in different formats. Supported formats are HTML (default setting), CSV, XLS, RTF and PDF.
- **Chart Type:** With the help of this selection a chart type can be chosen for the generated evaluation. Projectile offers various bar charts (2D, 3D, vertical, horizontal, ...), bar stacks, line and area charts, pie charts and bubble charts.
- **Paper Size:** In this selection box, the paper format can be specified. Based on the entered size of the sheet, the evaluation is displayed larger or smaller.
- **Landscape Format:** With the help of this option the evaluation can be displayed and printed as landscape format.

- **Display Evaluation Parameters:** Here you can select whether the evaluation parameters are to be displayed.



6. Results

This tab contains the maximum number of results and the results of evaluations already performed.

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Last update: **2021/06/11 14:02**

