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2.05.08 Project Evaluation

The project evaluation realizes the project-related evaluations. This includes the project overview, the work breakdown structure, plan/actual comparisons for projects and work packages, the milestone trend analysis, the visualization of degrees of completion, time statements and a skills matrix.



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.
- **Evaluation:** The project evaluation contains the following evaluations:
 - Project Overview
 - Project Structure Plan
 - Projects Plan/Actual and Work Package Plan/Actual
 - Milestone Trend Analysis
 - Degree of Completion
 - Time Statements
 - Skill Matrix
 - Resource Planning
 - Network Map
- **Report Selection:** Use this field to select the new report selection.

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 cost center of the projects and restrict the selection of the projects considered accordingly (only projects that are 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).
- **Product, Strategic Relevance, Utility, Class:** In these selection boxes you can choose Product, Strategy, Utility and Class as selection criteria. These selections refer to the fields of the same name in the project.
- **Status:** In this selection box, you can choose status (passive, active, advance payment, ...) as selection criteria. This status refers to the project specifications and restricts the project selection accordingly (only projects with this status are displayed).
- **Priority:** In this selection box you can choose priority as a selection criterion. These values refer to the priority of the project (even if other priorities are assigned in the work packages) and restrict the selection of the project accordingly.
- **Period:** This selection controls the period display for periodic evaluations: daily, weekly, monthly, quarterly, semi-annually or annually.
- **External Order:** This selection refers to the external indicator of the project and restricts the project selection accordingly (only external projects are displayed).
- **Filter Employee Unit:** This checkbox controls the effectiveness of the selection of units or employees. If the checkbox is not set, the filter is activated. If the checkbox is set, the filter will not filter by the selected units or employees.
- **Documents without actual effort:** With this option, lines are also displayed in plan/actual comparisons where actual effort = 0.
- **Work Packages in Detail:** This indicator controls whether work packages (indicator set) or operations (indicator not set) should be displayed in the generated evaluation.
- **One Line per Time Recording:** This indicator controls whether one line per time recording should be displayed in the generated evaluation. If the indicator is not set, one line is displayed per work package.
- **Only Main Projects:** This checkbox indicates whether only main projects without sub-projects should be displayed in the generated evaluation.
- **Intersection Filter:** This checkbox controls the type of filter. If the checkbox is not set, the union of all criteria is used for filtering. If the checkbox is set, an intersection filter applies, i.e. only those projects are displayed for which all filter criteria apply simultaneously.
- **Use Filter on Subprojects:** This checkbox controls the application of the filter to the subprojects. If the checkbox is set, all filter criteria also apply to the subproject level.



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.
- **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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