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## 2.5.08 Portfolio Chart

Die Portfolio-Auswertung wertet Zusammenstellungen von Projekten (Portfolio) über mehrere Achsen aus. Basis dieser Auswertung ist die Zusammenstellungen von Projekten in der Maske Portfolio. In dieser Maske können die Projekte zusammengestellt werden und die Achsen für die Auswertungen vordefiniert werden.

**Tip:** For more on this subject see chapter [4.5 Bedienung der Auswertungen](#) und [4.5.07 Portfolio-Auswertung](#).

**Portfolio-Auswertung**

Erzeugen einer Auswertung  
Dokument Bearbeiten Ansicht

Eingabedaten Parameter Format Ergebnisse

**1. Name:** Wenn Sie die Kriterien der Auswertung speichern möchten, geben Sie einen Namen an

Name: 2

Bezeichnung: Portfolio-Auswertung

Auswertung: 01 - Portfolio-Diagramm ✓

Report-Zusammenstellung: [Dropdown]

**2. Eingabedaten:** Stellen Sie die Dokumente zusammen, für welche die Auswertung erzeugt werden soll. Benutzen Sie dazu (ggf. mehrfach) diese Suchmaschine

Profisuche: [Dropdown] ✓

Schnellsuche: [Text Field] Kategorie: [Dropdown] ✓ [Search Icon]

Eingabedaten: 1 - 1 / 1

1 [Checkbox] [Icon] Portfolio development

**3. Hauptparameter:** Stellen Sie hier die wichtigsten Parameter ein:

X-Kategorie: Plandauer [Dropdown]

Y-Kategorie: Ist-Zeit [Dropdown]

Z-Kategorie: Plankosten [Dropdown]

Farb-kategorie: Kategorie [Dropdown]

The form consists of the following elements:

### 1. Name

- **Name:** In this field the name of the chart is defined, if this should be saved (for example, for time services or for administrating the chart results).
- **Description:** In this field the description of the chart is defined, if this should be saved.
- **Chart:** The portfolio chart generates tabular or graphical charts regarding the information in

the X-, Y-, Z- and color category. Key figures available for the X-, Y- and Z-Axis are offer value, completion, actual time, actual costs, planned revenue, planned duration, planned costs, invoice value and estimation. Up to five project categories (for example, project category), priority and the project status are available as key figures for the color category.

## 2. Input Data

- **Search:** It is possible to search for data for the chart with this selection box. This search entry must relate to the supported categories.
- **Search machine: Search Word and Category:** This element is used to filter the selected data from the categories. Only the document types job, contact, employee, project and unit is available for selection. How to operate the search machine is described in chapter 3.2.2.3 and can be performed, if necessary, a multiple amount of times.
- **Input Data:** Under this field, the selected selection criteria for the chart are listed. This input data can derive from the „professional search“(Profisuche), the standard search machine or the personal clipboard.

## 3. Main Parameters

- **X-, Y-, Z- and Color Kategorie:** These check boxes refer to the chart axes and support the above specified key figures.

The screenshot shows a software window titled 'Portfolio-Auswertung'. Below the title bar is a toolbar with icons for a bar chart, a question mark, a printer, and a green arrow. The main menu bar includes 'Erzeugen einer Auswertung', 'Dokument', 'Bearbeiten', and 'Ansicht'. Below this is a tabbed interface with 'Eingabedaten', 'Parameter', 'Format' (selected), and 'Ergebnisse'. The 'Format' tab contains the following settings:

**5. Einstellungen zur Ansicht:** Stellen Sie hier ein, wie die Grafik der Auswertung aussehen soll

|             |                 |    |
|-------------|-----------------|----|
| Breite      | 800             | px |
| Höhe        | 600             | px |
| Display     | CHART           |    |
| Diagrammtyp | Blasen-Diagramm |    |

## 5. Adjustment of Chart Display

- **Width:** The width in pixel (px) is determined for the graphical chart in this field.
- **Line Height:** The size of the font in points (pt) is determined for the graphical chart in this field.
- **Display:** The generated chart can be generated in various formats with this selection. HTML (standard setting), CSV, XLS (MS Excel), PDF, RTF (text processing) are supported.
- **Chart Type:** A chart type can be selected for the generated chart with this selection. Projectile offers various types of bar charts (2D, 3D, verticle, horizontal, ...), column charts, line charts, area charts as well as pie charts an bubble charts.

## 6. Results

The results of the already processed chart are found in this tab.

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