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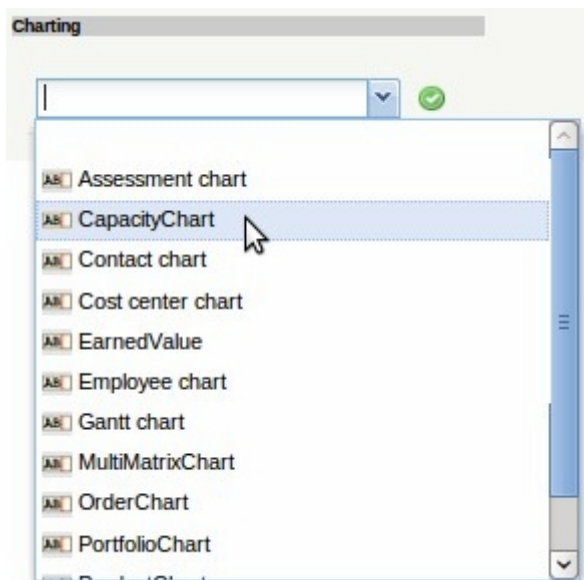
3.12 Chart System

The charts represent the central control tools within Projectile. Here, all employee-related, cost-related and project-related information can be accessed using various criteria. The information is available as either lists or diagrams.

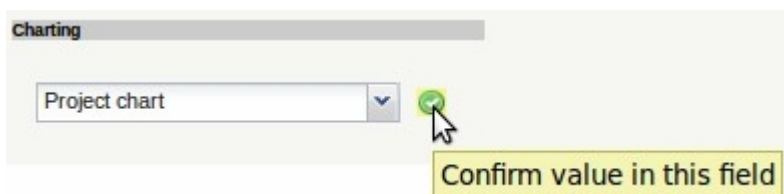
Applying the Chart System

Projectile contains numerous [standard charts](#). The charts are grouped by topic in chart blocks and contain up to 14 individual charts.

The charts can be opened in the work area using the action "Charting".



In the following example, various [project-related charts](#) are presented. The [project overview](#), the [work breakdown structure](#), [Projekte Plan/Ist /projects plan/actual comparisons](#) and [jobs plan/actual comparison](#), the [milestone trend analysis](#), the [degrees of completion](#), [time sheet](#) and the Skill Matrix belong to this chart block.



After opening the type of chart (here, the project charts) a chart document is opened. In the document selection criteria and the chart options can be configured.

Project chart

Generate chart

Document Edit View

InputData Parameters Format Results

1. Name: *If you would like to save a chart please enter a description*

Name: 15

Description: Project chart

Chart: [dropdown] ✓

Report Selection: [dropdown]

2. Input data: *To gather all the documents relevant for the chart please use the search engine (if need be repeatedly)*

Search: [dropdown]

Search word: [text box] Category: [dropdown] 🔍

Input data: [gear icon] No entries [dropdown]

3. Main parameters: *Please select parameters:*

Chart period: [dropdown]

Start: [text box] [dropdown]

End: [text box] [dropdown]

The first part (1. name) can be used for the naming the charts, if the chart is saved. Saving the chart is useful if the selection criteria for the charts remain constant, for example a list of all active projects for the current quarter. This saved chart can be copied to the clipboard or be used as the basis for a [time service](#) to automate charts. In addition, charts can also be generated in the background. To view the chart results, the charts must also be stored.

The second part (2. input data) is to determine the input data for the chart. In the third part (3. main criteria) the input data may be given a limited time span.

In the first example, the selection criteria for entering data, two projects from the personal clipboard is selected. These projects are highlighted in the clipboard, ...

Entries

page 1 of 1 1 - 7

	Description
<input type="checkbox"/>	1 GoodsGroup 1 Projectile
<input type="checkbox"/>	2 ChangeRequest 3-1 Change request
<input type="checkbox"/>	3 Collection Query 'Projectile'
<input type="checkbox"/>	4 Project 3 Introduction Projectile
<input type="checkbox"/>	5 Project 1 Introduction Projectile 2.5
<input checked="" type="checkbox"/>	6 Project 3 Introduction Projectile
<input checked="" type="checkbox"/>	7 Project 3 Introduction Projectile

... copied and ...

page 1 of 1 1 - 7

	Description
<input checked="" type="checkbox"/>	6 Project 3 Introduction Projectile
<input checked="" type="checkbox"/>	7 Project 3 Introduction Projectile

Remove
Cut
Copy
Add to clipboard
Create report from list
Toggle select

pasted in the entry data.

Project chart

Generate chart

Document Edit View

InputData Parameters Format Results

1. Name: *If you would like to save a chart please enter a description*

Name: 4

Description: Project chart

Chart: 01 - Project overview chart

Report Selection:

2. Input data: *To gather all the documents relevant for the chart please use the search engine (if need be repeatedly)*

Search:

Search word: Category:

Input data:

No entries Paste New document

Please select parameters:

This process can be performed many times (or performed with multiple entries). In the example below ...

Input data

page 1 of 1

<input type="checkbox"/>		
<input type="checkbox"/>	1	Project 3 Introduction Projectile

... Project 3 Introduction Projectile is the selection criteria, to which the charts are related.

Afterwards the displayed time span of the chart is limited to the current year ...

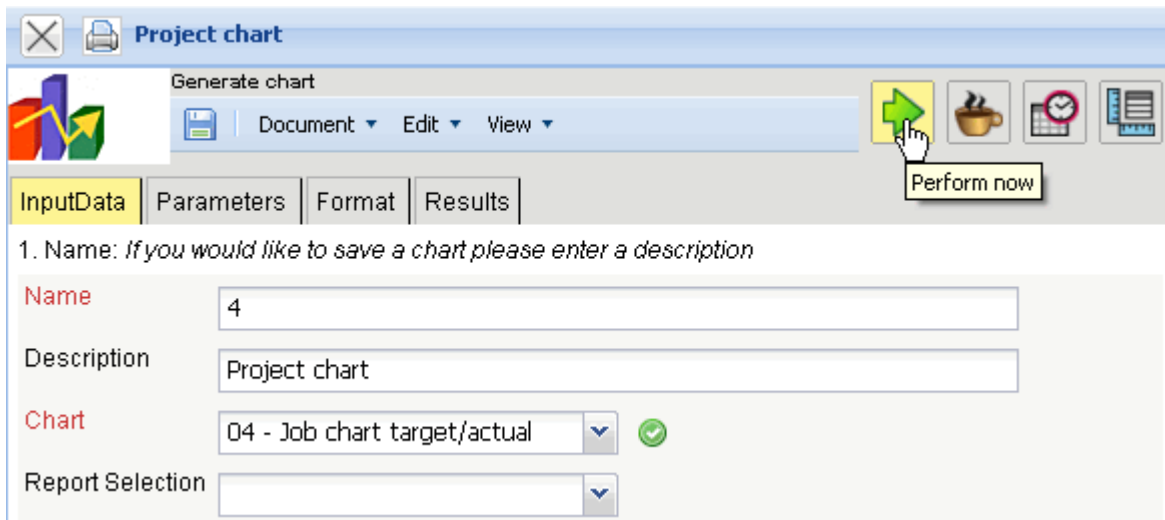
3. Main parameters: *Please select parameters:*

Chart period: Current year

Start: 01.01.2009

End: 31.12.2009

... and the chart "job plan/actual" is performed using .

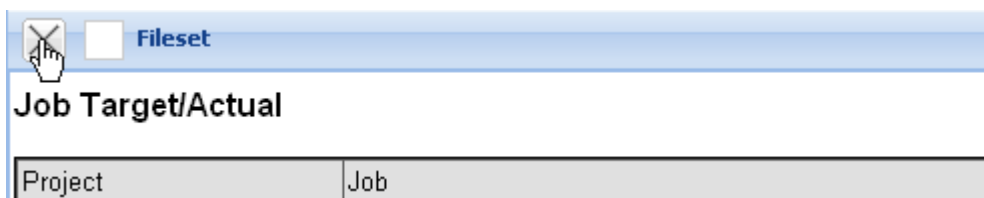


When the chart results are generated, the system presents the results in the browser. This chart contains information related to the projects, processes and/or jobs and employees, the planned and actual times with remaining time/effort and the corresponding difference (plan - actual), the planned completion period (start/end) and the status information (status, completion date and degree of completion for the task).

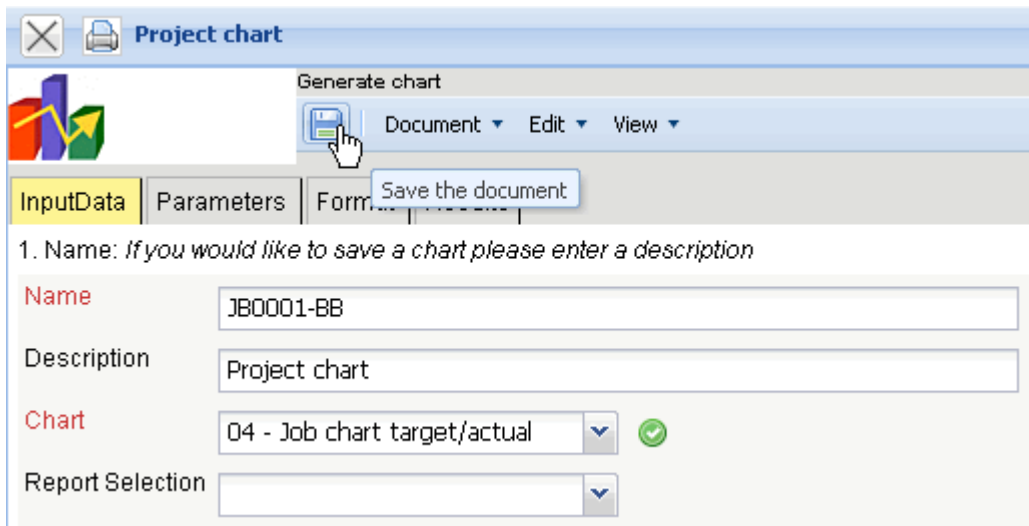
Job Target/Actual


Project	Job	Employee	Planned [h]	Actual [h]	Difference [h]	Rest	Begin	End	Closed	State
3 Introduction Projectile	3-1 Conception for combining Projectile and SAP CO/FI	Timothy Jones	16,00	38,00	-22,00	0,00	09.06.2009	30.10.2009		IN_PROCESS
3 Introduction Projectile	3-2 Installation Projectile	Timothy Jones	3,50	16,13	-12,63	0,00	09.06.2009	30.10.2009		IN_PROCESS
3 Introduction Projectile	3-3 Programming 4-3	Timothy Jones	40,00	7,28	32,72	32,72	09.06.2009	30.10.2009		IN_PROCESS
3 Introduction Projectile	3-4 Project Management	Conner Jane	30,00	20,00	10,00	16,00	19.10.2009	30.10.2009		IN_PROCESS
3 Introduction Projectile	3-5 3.1-1 Concept - 3 Planning	Conner Jane	30,00	19,75	10,25	0,00	19.10.2009	21.10.2009	20.10.2009	FINISHED
3 Introduction Projectile	3-6 Customizing	Conner Jane	20,00	16,50	3,50	3,50	02.10.2009	30.10.2009		IN_PROCESS
3.1 Introduction Accounting	3.1-1 Introduction Projectile	Conner Jane	0,00	7,50	-7,50	12,00	09.06.2009	01.10.2009		IN_PROCESS_LATE
			139,50	125,17	14,33	64,22				

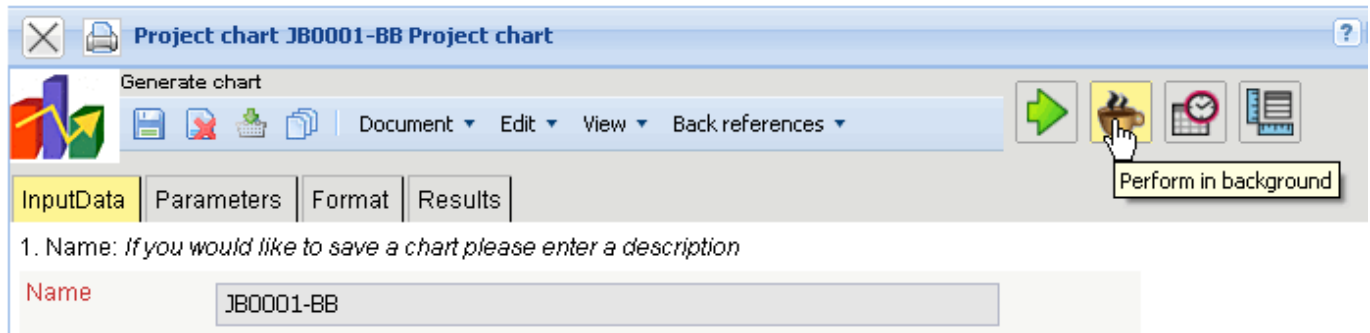
After closing the chart results, the project chart block is displayed once again.



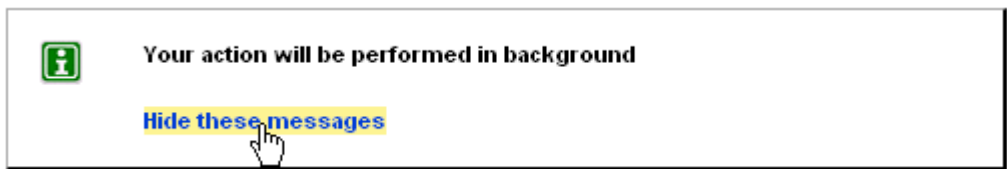
If the chart block is saved, the chart block can be used as a basis for time services or for charts in the background.



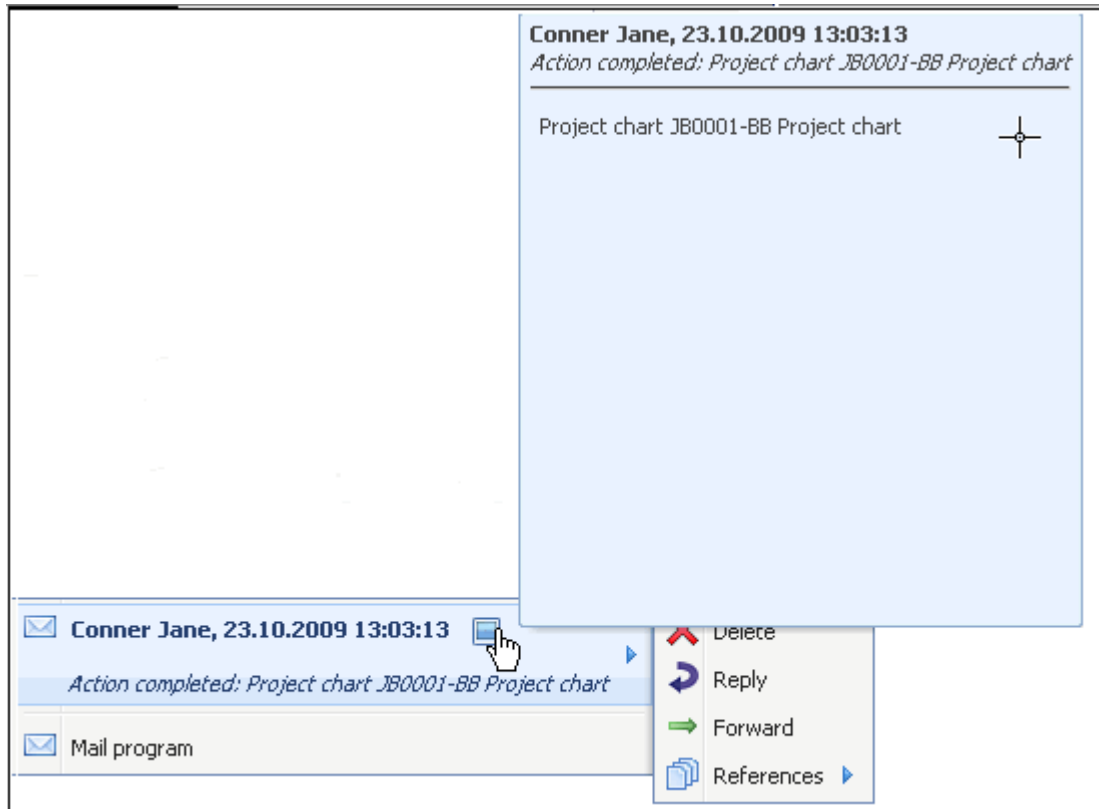
Using the  button, charts can be started in the background.



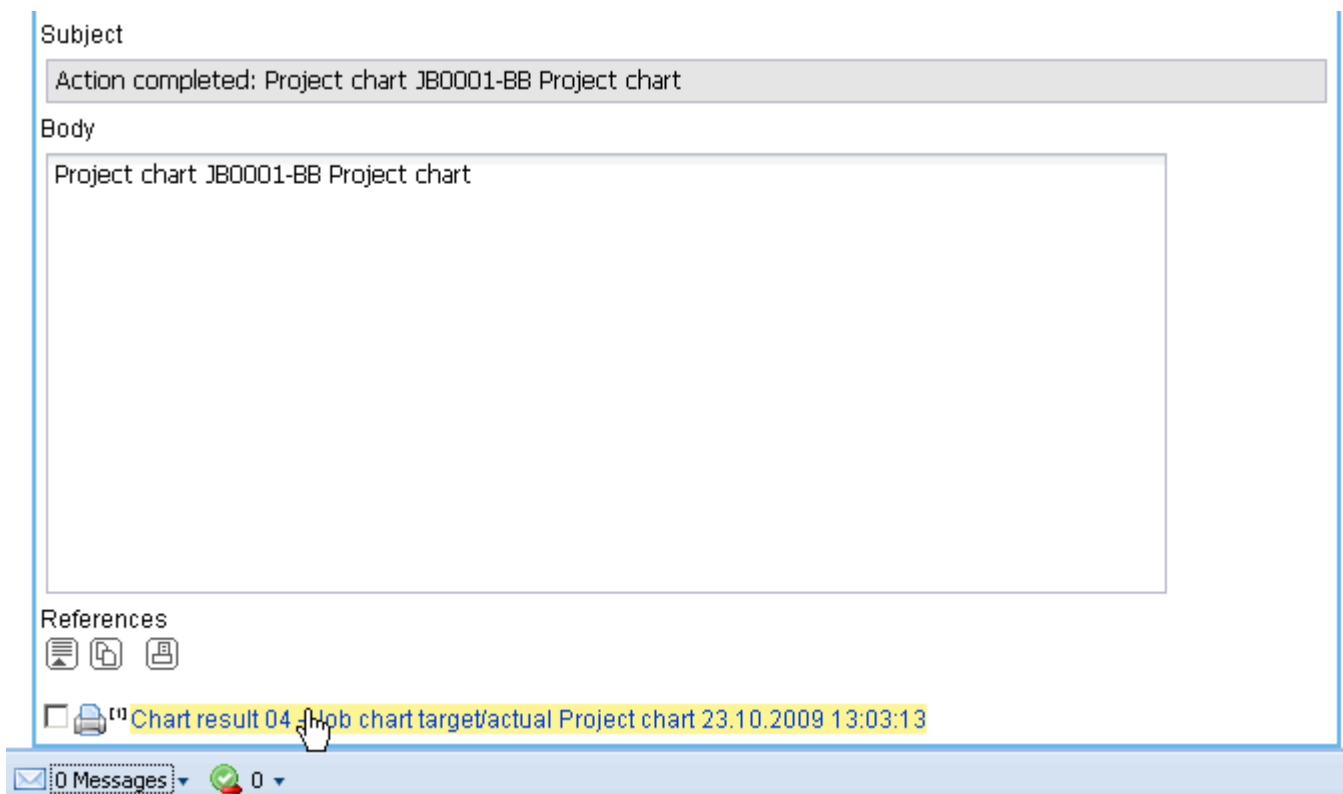
The user is informed of the background process by the system and displays ...



... an internal message as soon the chart results are generated.



In the mailer a message appears and the user can use the link to access ...



... the chart results.

Job Target/Actual

Project	Job	Employee	Planned [h]	Actual [h]	Difference [h]	EstimatedRemainingEffort	Begin	End	Closed	State
3 Introduction Projectile	3-1 Conception for combining Projectile and SAP CO/FI	Timothy Jones	16,00	38,00	-22,00	0,00	09.06.2009	30.10.2009		IN_PROCESS
3 Introduction Projectile	3-2 Installation Projectile	Timothy Jones	3,50	16,13	-12,63	0,00	09.06.2009	30.10.2009		IN_PROCESS
3 Introduction Projectile	3-3 Programming 4-3	Timothy Jones	80,00	7,28	72,72	72,72	09.06.2009	30.10.2009		IN_PROCESS
3 Introduction Projectile	3-4 Project Management	Conner Jane	8,00	20,00	-12,00	16,00	19.10.2009	30.10.2009		IN_PROCESS
3 Introduction Projectile	3-5 3.1-1 Concept - 3 Planning	Conner Jane	30,00	19,75	10,25	0,00	19.10.2009	21.10.2009	20.10.2009	IN_PROCESS
3 Introduction Projectile	3-6 Customizing	Conner Jane	0,00	16,50	-16,50	0,00	02.10.2009	30.10.2009		IN_PROCESS
3.1 Introduction Accounting	3.1-1 Introduction Projectile	Conner Jane	0,00	7,50	-7,50	12,00	09.06.2009	01.10.2009		IN_PROCESS
	3-7 A A A A A A A	3 A A A A A A A	137,50	125,17	12,33	100,72				

In the second example, the standard search engine for the selection of input data is used. Here, for example, all projects (selected category), which contain the term "Projectile" ...

Search

Search word: Projectile

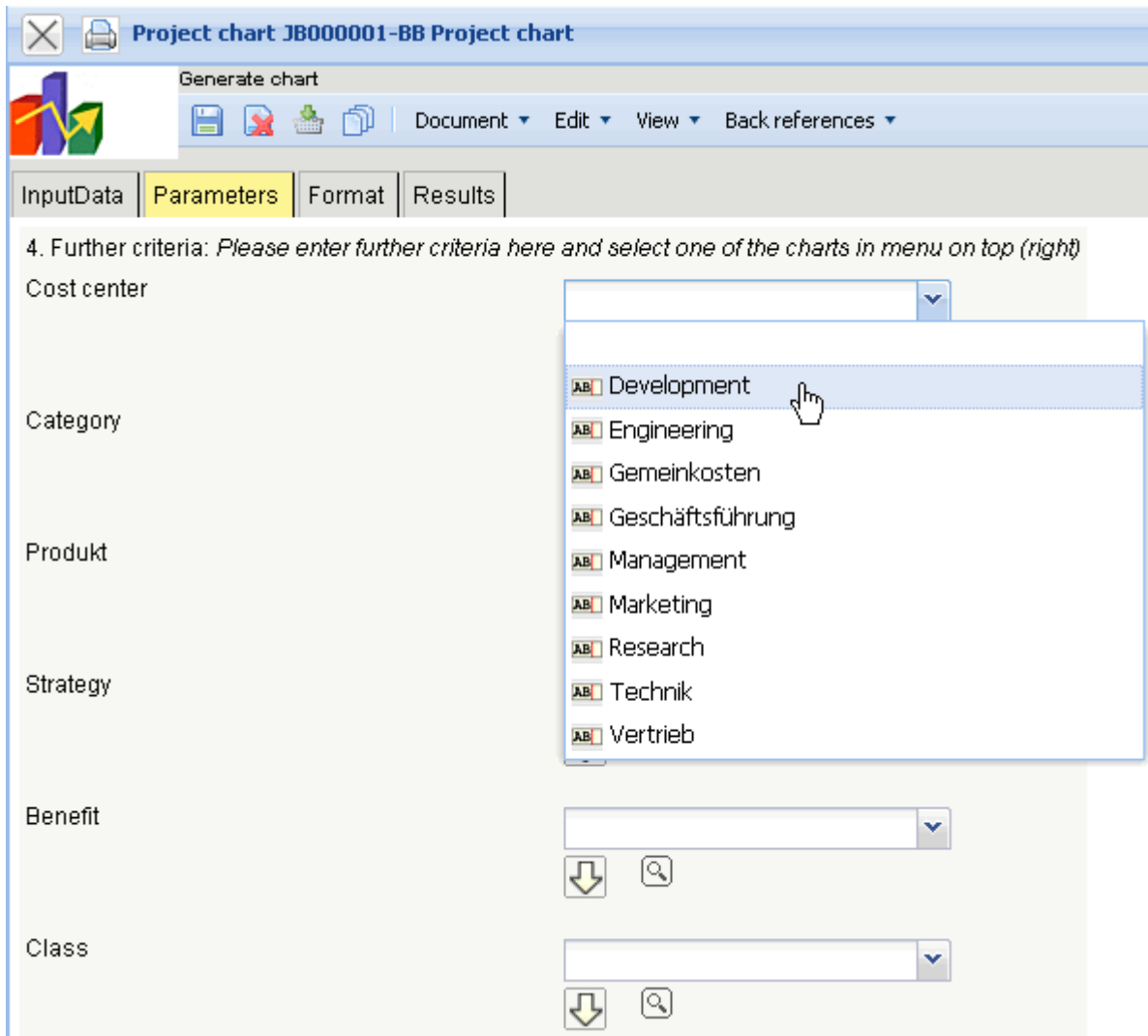
Category: Project

Find

Input data

Item	Project
1	Project 1 Introduction Projectile 2.5
2	Project 1.1 Planning
3	Project 1.2 Customizing
4	Project 2 Introduction Projectile 2.7
5	Project 2.1 Planning
6	Project 2.2 Customizing
7	Project 3 Introduction Projectile
8	Project 7 Update Projectile
9	Project 7.1 Introduction Accounting

... are used as input data.



This process can be performed a multiple amount of times (with various categories).

1. Name: *If you would like to save a chart please enter a description*

Name: JB000001-BB
Description: Project chart
Chart: 04 - Job chart target/actual
Report Selection:

2. Input data: *To gather all the documents relevant for the chart please use the search engine (if need be repeatedly)*

Search:

Search word: Projectile
Category: Project

Input data:

1	Project 2 Introduction Projectile 2.7	
2	Project 3 Introduction Projectile	

The third possibility to select the input data, is by using the advanced search. Here, appropriate queries are stored, which can be used immediately.

Project chart JB000001-BB Project chart

Generate chart

Document Edit View Back references

InputData Parameters Format Results

4. Further criteria: *Please enter further criteria here and select one of the charts in menu on top (right)*

Cost center

Category

Produkt

Strategy

Benefit

Class

- Development
- Engineering
- Gemeinkosten
- Geschäftsführung
- Management
- Marketing
- Research
- Technik
- Vertrieb

In the example, all top projects with the status “active” are transferred into the input data.

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: 36

Bezeichnung: Projektauswertung

Auswertung: 04 - Arbeitspakete Plan/Ist

Report-Zusammenstellung:

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

Profisuche: Hauptprojekte (aktive)

Schnellsuche: Projectile Kategorie: Projekt

Eingabedaten: 1 - 8 / 8

<input checked="" type="checkbox"/>		
1	<input type="checkbox"/>	Projekt BMW06 Implementation TransportManager
2	<input type="checkbox"/>	Projekt BMW03 SAP Add-ons BMW
3	<input type="checkbox"/>	Projekt DS09 Einführung Risikomanagement
4	<input type="checkbox"/>	Projekt VF09 Einführung Projectile
5	<input type="checkbox"/>	Projekt CS07 Einführung Projectile
6	<input type="checkbox"/>	Projekt 106 Einführung Projectile
7	<input type="checkbox"/>	Projekt 92 QM-Modul
8	<input type="checkbox"/>	Projekt 100 Einführung Fibu

Then the view time span (3. Main parameters) and the further criteria are used (4. Parameters) to limit the results of the charts. These parameters include for example, the cost center of the project, the project type, project status, priority, and whether the project is an external order or not. The other options relate to filtering results.

Projektauswertung 36

Erzeugen einer Auswertung

Dokument Bearbeiten Ansicht

Eingabedaten **Parameter** Format Ergebnisse

4. Weitere Kriterien: Geben Sie weitere Parameter hier ein und starten Sie dann die gewünschte Auswertung aus dem Menü oben rechts

Kostenstelle

Projektart

Risiko

Strategie

Nutzen

Klasse

Status

Priorität

Periode

Externer Auftrag

Filter Mitarbeiter-Unit

Dokumente ohne Istaufwand

Arbeitspakete im Detail

Eine Zeile pro Zeiterfassung

Nur Hauptprojekte

Schnittmengenfilter

Filter auf Unterprojekte anwenden

In the example, all projects are evaluated, which are assigned to cost center technology, the project type customizing or introduction are assigned, a necessary project or an optional project ...

4. Weitere Kriterien: Geben Sie weitere Parameter hier ein und starten Sie dann die gewünschte Auswertung aus dem Menü oben rechts

Kostenstelle

Projektart

Risiko

Strategie

Nutzen

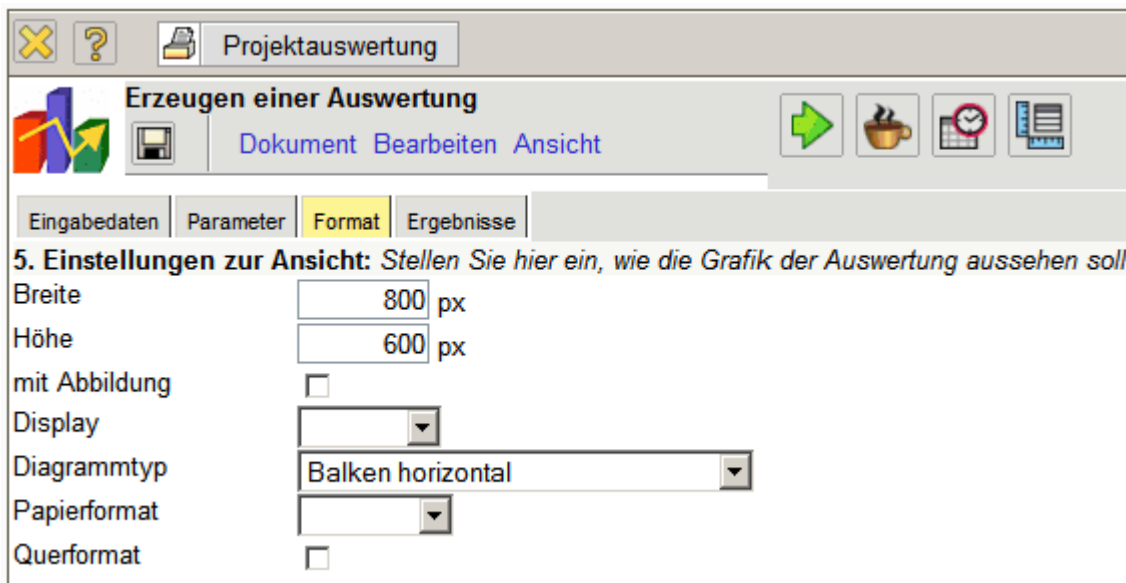
Klasse

Status

... and has the status active or advance services.

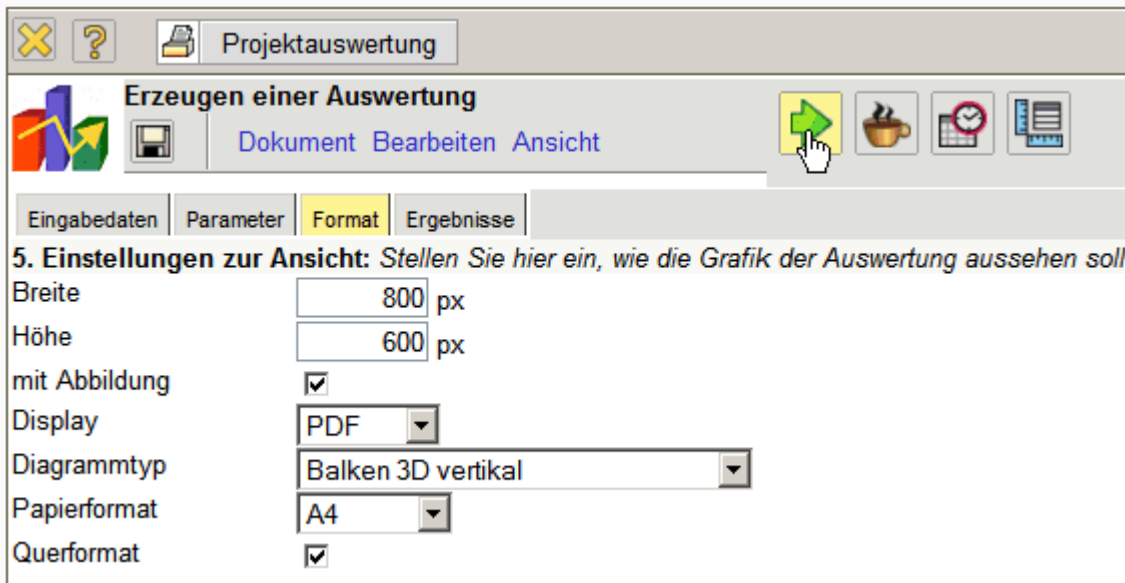
Arbeitspakete Plan/Ist											
Projekt	Vorgang	Mitarbeiter	Plan [h]	Ist [h]	Rest [h]	Differenz	Plan-Beginn	Plan-Ende	Ist-Ende	Status	FG [%]
92 QM-Modul	92-1 Projektleitung	Schaub Peter	40,00	35,00	6,00	5,00	05.12.2006	26.01.2007		in Arbeit	85,37
92.1 Planung	92.1-1 Konzeption	Becker Norbert	24,00	16,00	8,00	8,00	05.12.2006	20.12.2006		in Arbeit, verspätet	66,67
92.1 Planung	92.1-2 Spezifikation	Batzeck Klaus	24,00	0,00	24,00	24,00	20.12.2006	27.12.2006		geplant	0,00
92.1 Planung	92.1-3 Pflichtenheft	Schmidt Lisa	32,00	0,00	32,00	32,00	28.12.2006	03.01.2007		geplant	0,00
92.2 Umsetzung	92.2-1 Templates	Becker Norbert	24,00	0,00	24,00	24,00	08.01.2007	10.01.2007		geplant	0,00
92.2 Umsetzung	92.2-2 Applikationslogik	Schneider Christian	48,00	0,00	48,00	48,00	11.01.2007	12.01.2007		geplant	0,00
92.2 Umsetzung	92.2-5 Reports	Lange Sandra	32,00	0,00	32,00	32,00	15.01.2007	18.01.2007		geplant	0,00
92.2 Umsetzung	92.2-6 Testen	Franke Helene	8,00	0,00	8,00	8,00	26.01.2007	26.01.2007		geplant	0,00
92.2 Umsetzung	92.2-7 Dokumentation	Schaub Peter	8,00	0,00	8,00	8,00	19.01.2007	19.01.2007		geplant	0,00
VF09 Einführung Projectile	VF09-1 Projektleitung	Batzeck Klaus	24,00	184,00	1,00	-160,00	13.03.2006	05.06.2006		in Arbeit, verspätet	99,46
VF09.1 Planung	VF09.1-1 Konzeptgespräche	Möller Frauke	16,00	0,00	16,00	16,00	13.03.2006	16.03.2006		geplant, verspätet	0,00
VF09.1 Planung	VF09.1-2 Pflichtenheft erstellen	Franke Helene	12,00	10,00	6,00	2,00	20.03.2006	23.03.2006		in Arbeit, verspätet	50,00
VF09.2 Customizing	VF09.2-1 Entwicklung	Schaub Peter	64,00	24,75	0,00	39,25	23.03.2006	21.04.2006	27.04.2006	erledigt, verspätet	100,00
VF09.2 Customizing	VF09.2-2 Dokumentation	Franke Helene	20,00	1,00	0,00	19,00	10.05.2006	24.05.2006	06.04.2006	erledigt	100,00
VF09.2 Customizing	VF09.2-3 Testen	Gielert Thomas	8,00	0,00	8,00	8,00	10.05.2006	24.05.2006		geplant, verspätet	0,00
VF09.3 Einführung	VF09.3-1 Installation/Konfiguration	Franke Helene	8,00	0,00	8,00	8,00	24.05.2006	29.05.2006		geplant, verspätet	0,00
VF09.3 Einführung	VF09.3-2 Schulung	Schaub Peter	16,00	23,00	0,00	-7,00	29.05.2006	02.06.2006	06.07.2006	erledigt, verspätet	100,00
			408,00	293,75	229,00	114,25					

On the “format” tab (5. Settings for chart display), for example, the width of the images in pixels are selected and the diagram type is selected.



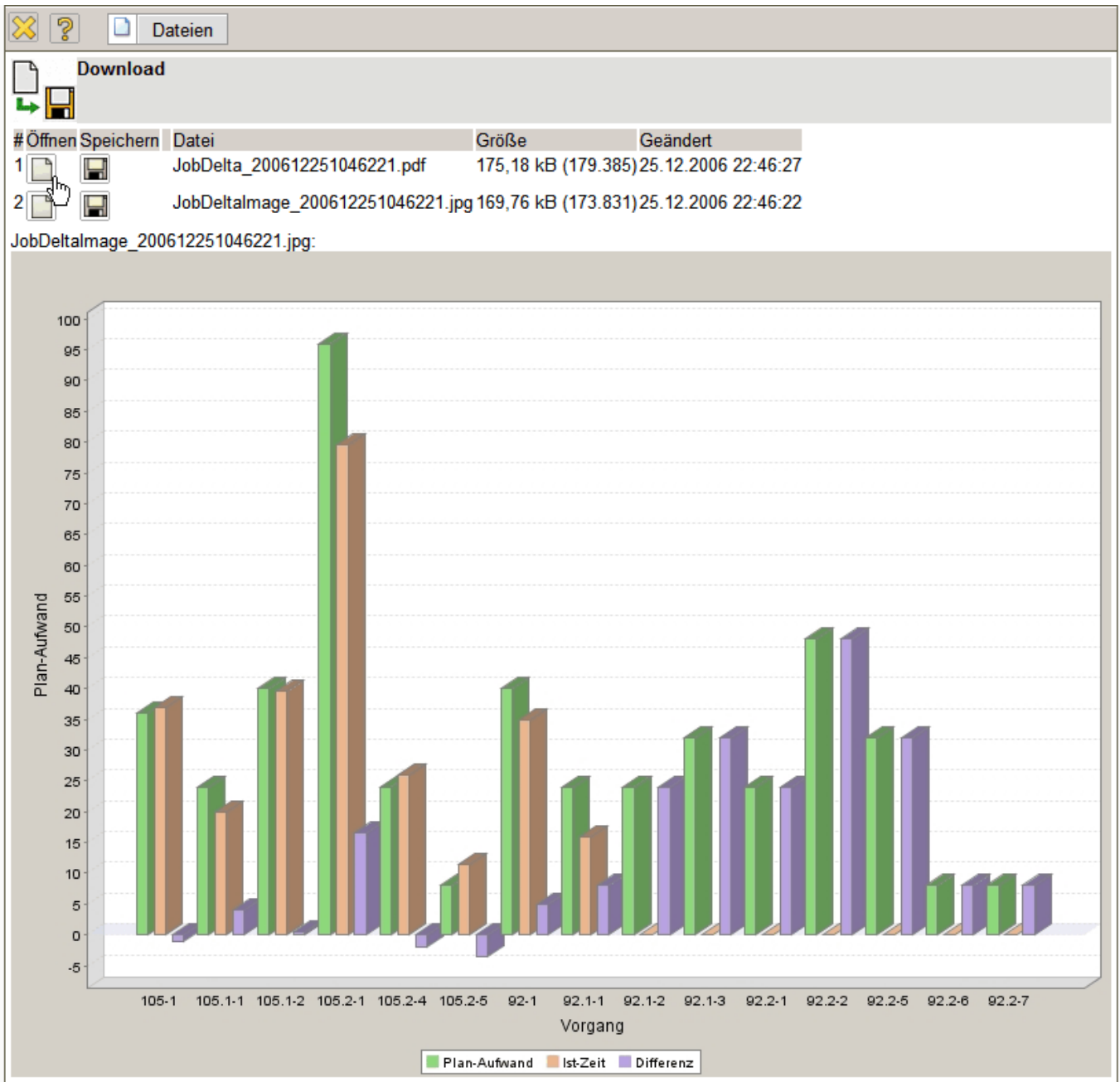
If alternative output formats are desired (by default, all reports are generated in HTML within the application) the output format can be chosen in the element “display”.

In the following example, the chart job plan/actual is generated with the illustration (diagram type “bar chart”) ...



... with the pdf output format.

Depending on the system setting, the generated chart is opened in the browser ...



... or in the appropriate display program ...

Adobe Reader - [JobDelta_200612251056461.pdf]

Seiten

Arbeitspakete Plan/Ist

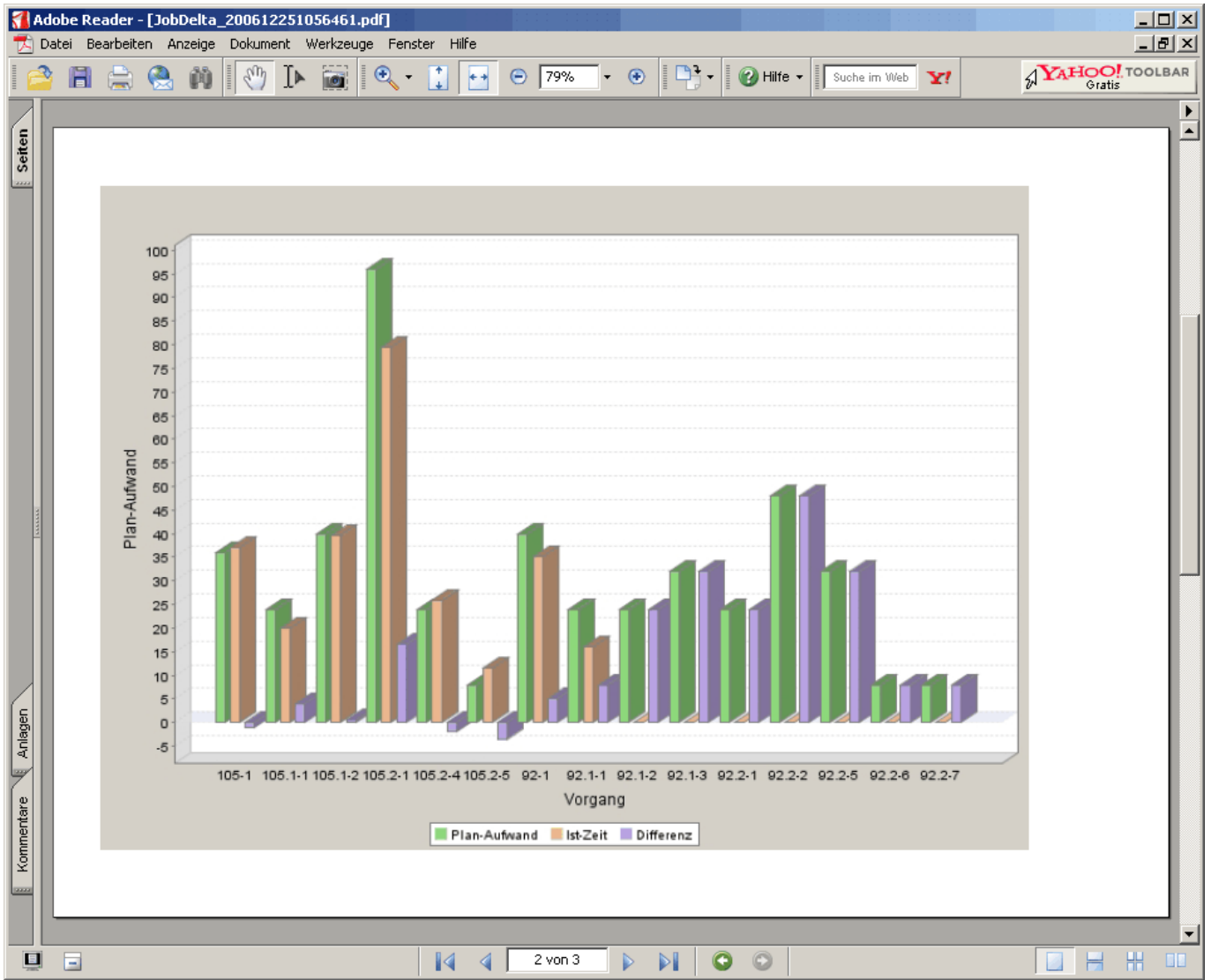
Projekt	Vorgang	Mitarbeiter	Plan [h]	Ist [h]	Rest [h]	Differenz	Plan-Beginn	Plan-Ende	Ist-Ende	Status	FG [%]
105 Implementation Projectile	105-1 Projektleitung	Schaub Peter	36,00	37,00	0,00	-1,00	09.02.2004	05.03.2004	06.03.2004	erledigt, verspätet	100,00
105.1 Planung	105.1-1 Konzeptgespräche	Schaub Peter	24,00	20,00	0,00	4,00	09.02.2004	11.02.2004	11.02.2004	erledigt	100,00
105.1 Planung	105.1-2 Pflichtenheft erstellen	Meier Dieter	40,00	39,50	0,00	0,50	11.02.2004	17.02.2004	17.02.2004	erledigt	100,00
105.2 Customizing	105.2-1 Entwicklung	Miller John	96,00	79,50	0,00	16,50	17.02.2004	26.02.2004	27.02.2004	erledigt, verspätet	100,00
105.2 Customizing	105.2-4 Dokumentation	Meier Dieter	24,00	26,00	0,00	-2,00	26.02.2004	01.03.2004	02.03.2004	erledigt, verspätet	100,00
105.2 Customizing	105.2-5 Testen	Schaub Peter	8,00	11,50	0,00	-3,50	26.02.2004	01.03.2004	01.03.2004	erledigt	100,00
92 QM-Modul	92-1 Projektleitung	Schaub Peter	40,00	35,00	6,00	5,00	05.12.2006	26.01.2007		in Arbeit	85,37
92.1 Planung	92.1-1 Konzeption	Becker Norbert	24,00	16,00	8,00	8,00	05.12.2006	20.12.2006		in Arbeit, verspätet	66,67
92.1 Planung	92.1-2 Spezifikation	Batzeck Klaus	24,00	0,00	24,00	24,00	20.12.2006	27.12.2006		geplant	0,00
92.1 Planung	92.1-3 Pflichtenheft	Schmidt Lisa	32,00	0,00	32,00	32,00	28.12.2006	03.01.2007		geplant	0,00
92.2 Umsetzung	92.2-1 Templates	Becker Norbert	24,00	0,00	24,00	24,00	08.01.2007	10.01.2007		geplant	0,00
92.2 Umsetzung	92.2-2 Applikationslogik	Schneider Christian	48,00	0,00	48,00	48,00	11.01.2007	12.01.2007		geplant	0,00
92.2 Umsetzung	92.2-5 Reports	Lange Sandra	32,00	0,00	32,00	32,00	15.01.2007	18.01.2007		geplant	0,00
92.2 Umsetzung	92.2-6 Testen	Franke Helene	8,00	0,00	8,00	8,00	26.01.2007	26.01.2007		geplant	0,00
92.2 Umsetzung	92.2-7 Dokumentation	Schaub Peter	8,00	0,00	8,00	8,00	19.01.2007	19.01.2007		geplant	0,00
			468,00	264,50	190,00	203,50					

Anlagen

Kommentare

1 von 3

... (here with Adobe Reader).



In the "Results" tab, the chart results are administered.

The interface shows the 'Ergebnisse' tab selected. The title is '6. Ergebnisse: Hier finden Sie die Ergebnisse bereits durchgeführter Auswertungen'. The 'Max. Anzahl Ergebnisse' is set to 10. A list of results is shown, each with a checkbox and a document icon.

Checkbox	Icon	Result Text
<input type="checkbox"/>	[1]	04 - Arbeitspakete Plan/Ist Projektauswertung 25.12.2006 22:56:43
<input type="checkbox"/>	[2]	04 - Arbeitspakete Plan/Ist Projektauswertung 25.12.2006 22:46:18
<input type="checkbox"/>	[3]	04 - Arbeitspakete Plan/Ist Projektauswertung 25.12.2006 22:43:24
<input type="checkbox"/>	[4]	04 - Arbeitspakete Plan/Ist Projektauswertung 25.12.2006 22:42:06
<input type="checkbox"/>	[5]	04 - Arbeitspakete Plan/Ist Projektauswertung 25.12.2006 22:41:34

Notes: The chart results are stored permanently only if the chart block is stored. The number of results in the field "Maximum number of results" can be set.

From:
<https://infodesire.net/dokuwiki/> - **Projectile-Online-Handbuch**

Permanent link:
https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_3:3.12_auswertungssystem&rev=1260793458



Last update: **2019/10/25 14:09**