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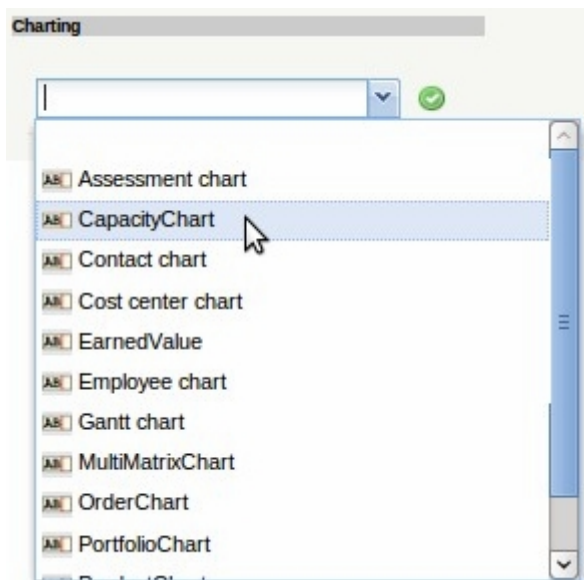
# 3.12 Chart System

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.

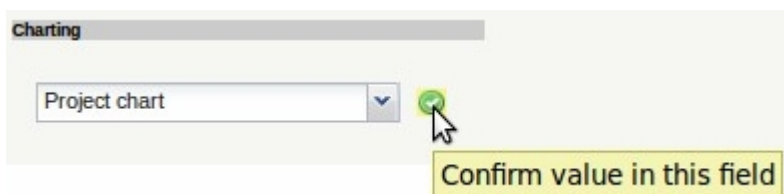
## Applying the Chart System

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

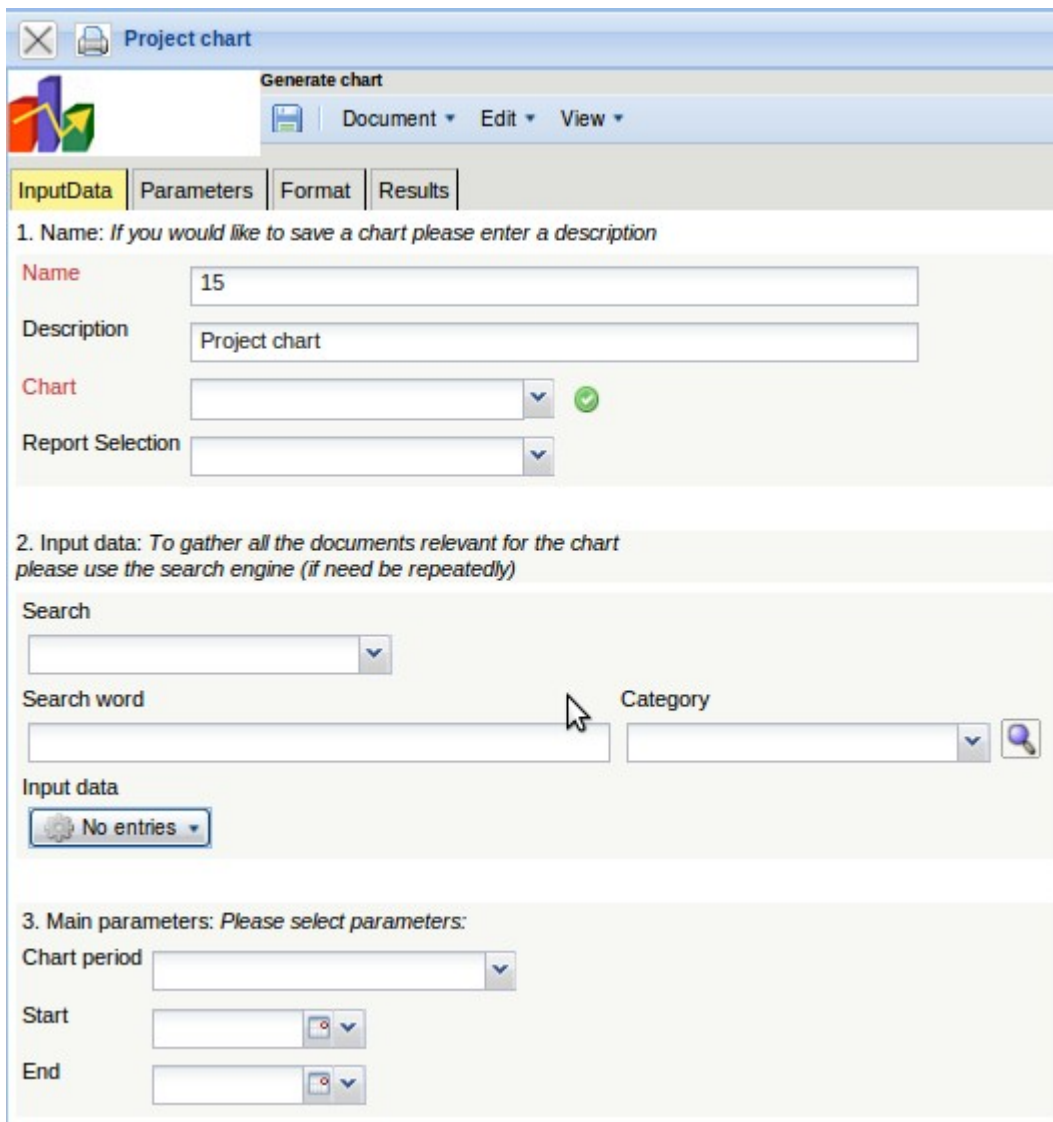
The charts can be opened in the work area using the action "Charting".



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.



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 ...

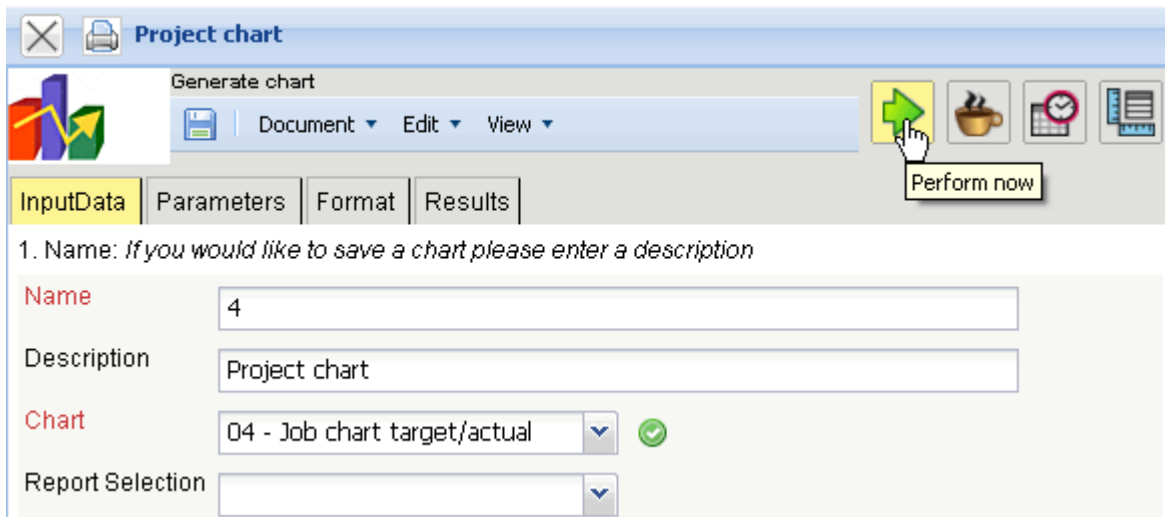
3. Main parameters: *Please select parameters:*

Chart period: Current year

Start: 01.01.2009

End: 31.12.2009

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

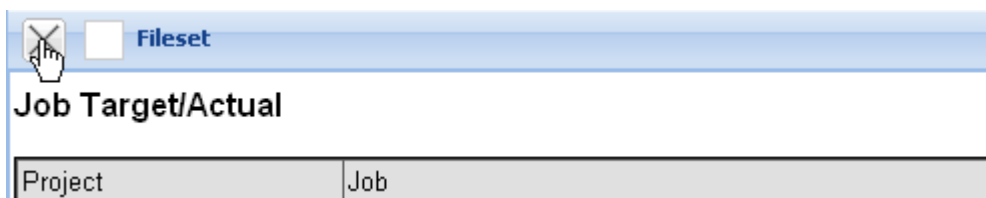


When the chart results are generated, the system presents the results in the browser. This chart contains information related to the projects, processes and/or jobs and employees, the planned and actual times with remaining time/effort and the corresponding difference (plan - actual), the planned completion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

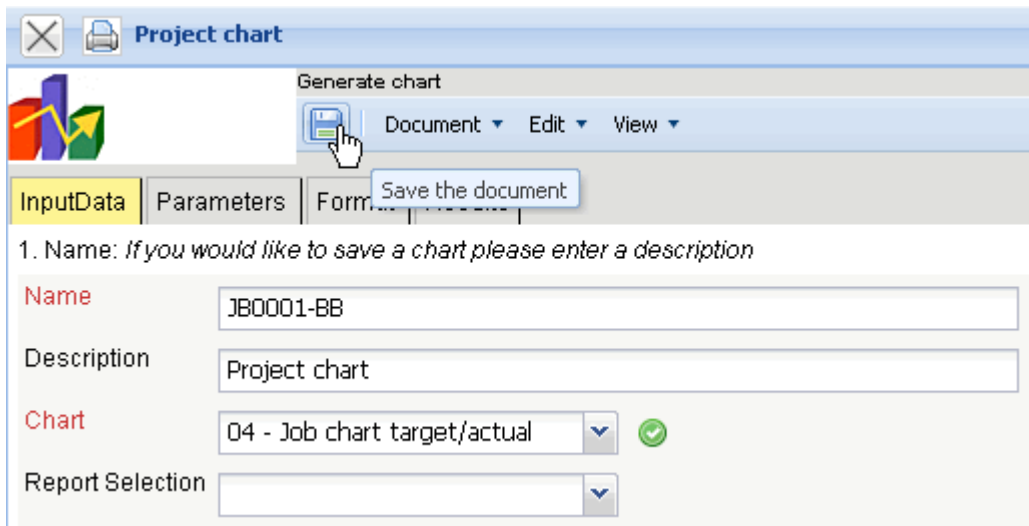
**Job Target/Actual**


| 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 |
|                             |                                                       |               | <b>139,50</b> | <b>125,17</b> | <b>14,33</b>   | <b>64,22</b> |            |            |            |                 |

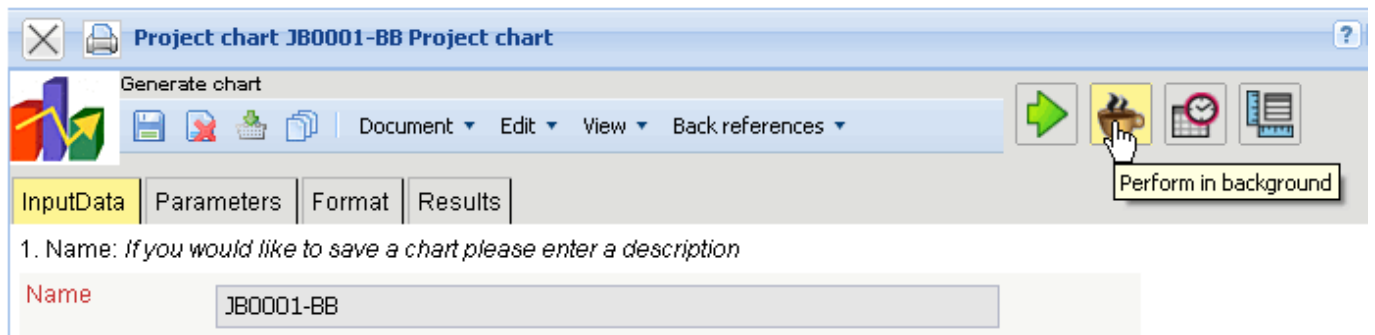
After closing the chart results, the project chart block is displayed once again.



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



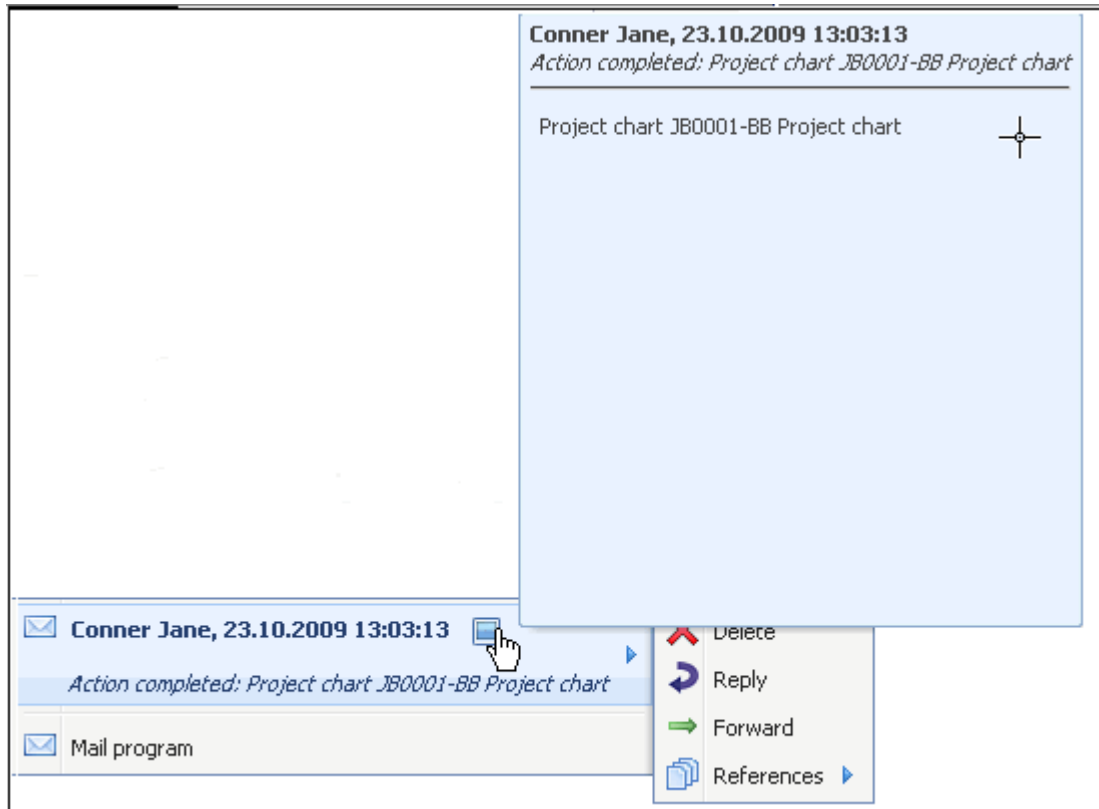
Using the  button, charts can be started in the background.



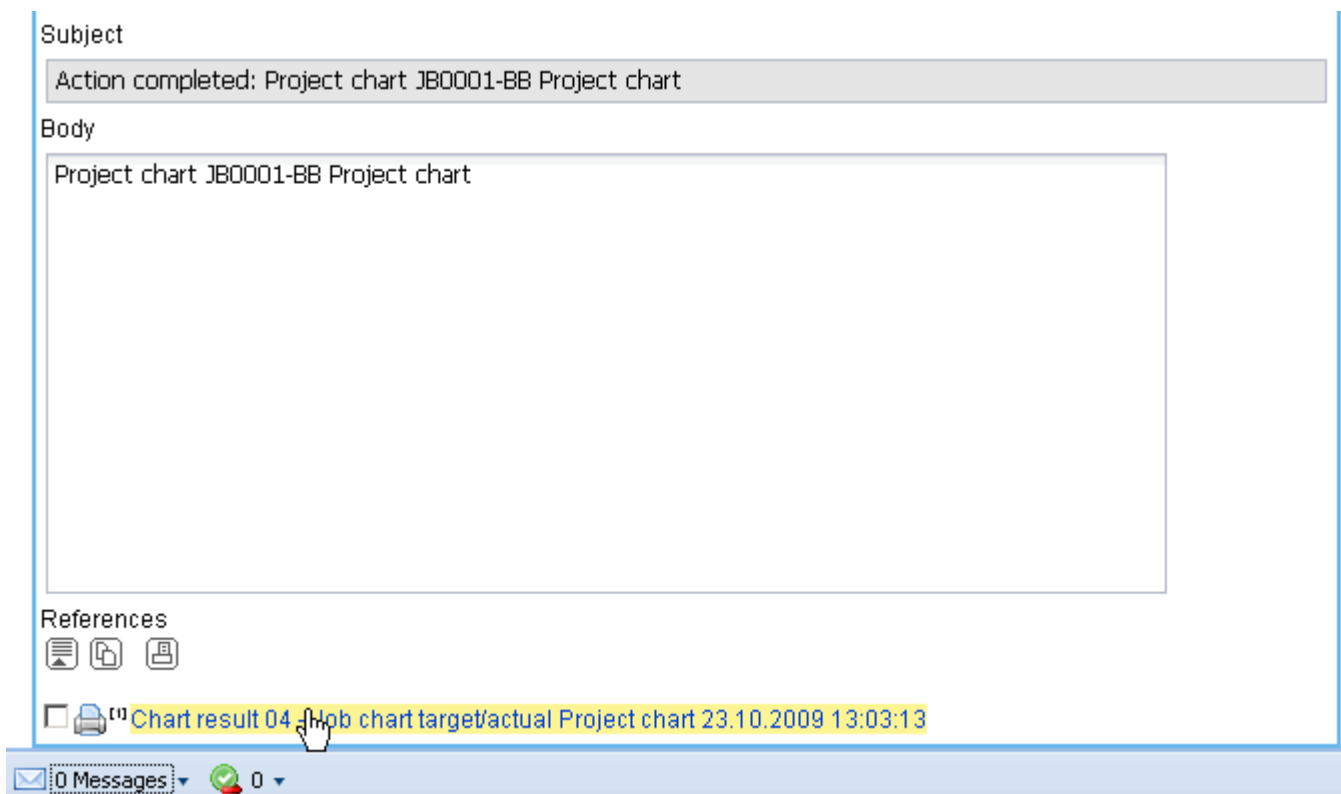
The user is informed of the background process by the system and displays ...



... 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.

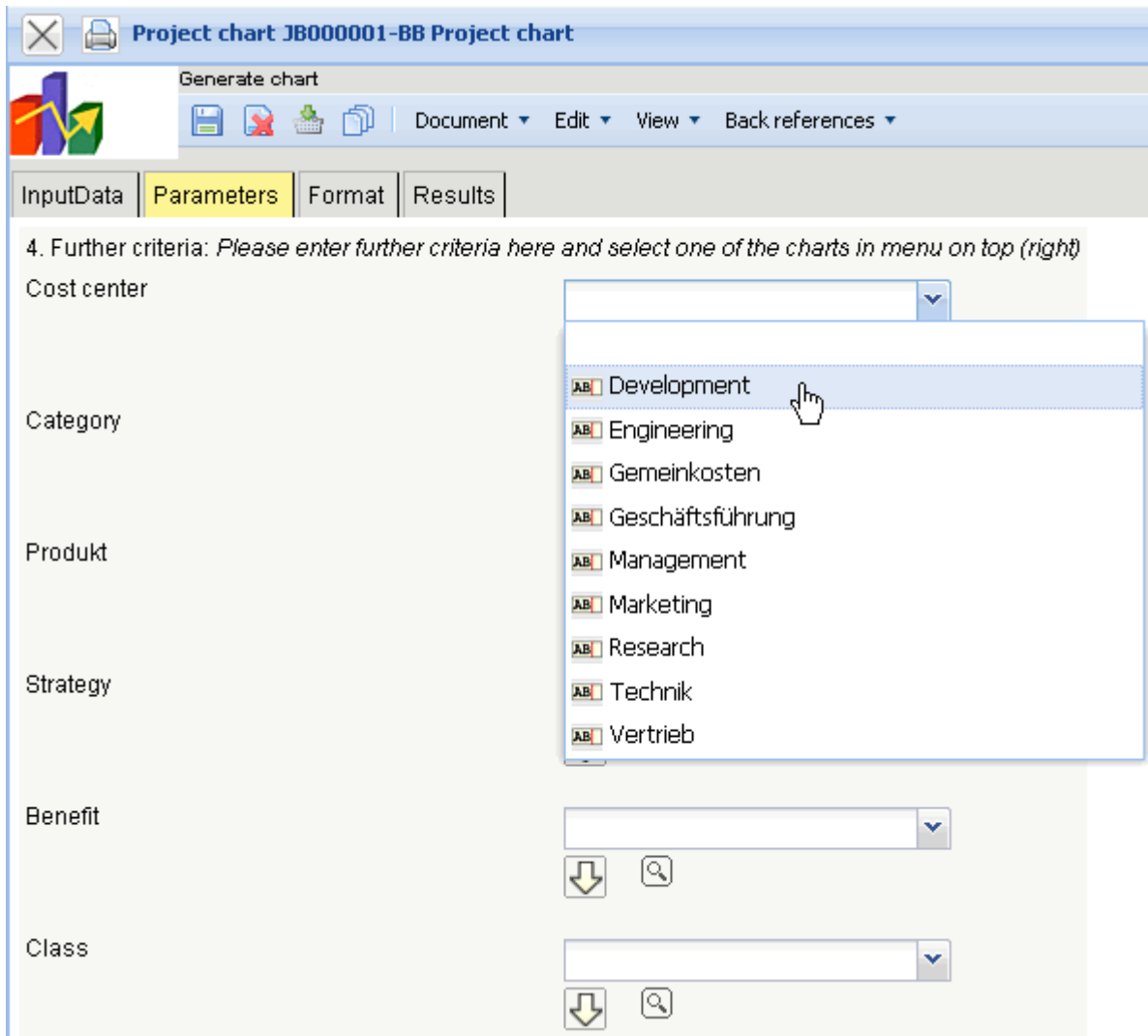
**Job Target/Actual**

| 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" ...

... are used as input data.





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

Project chart JB000001-BB Project chart

Generate chart

Document Edit View Back references

Perform now

InputData Parameters Format Results

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     |

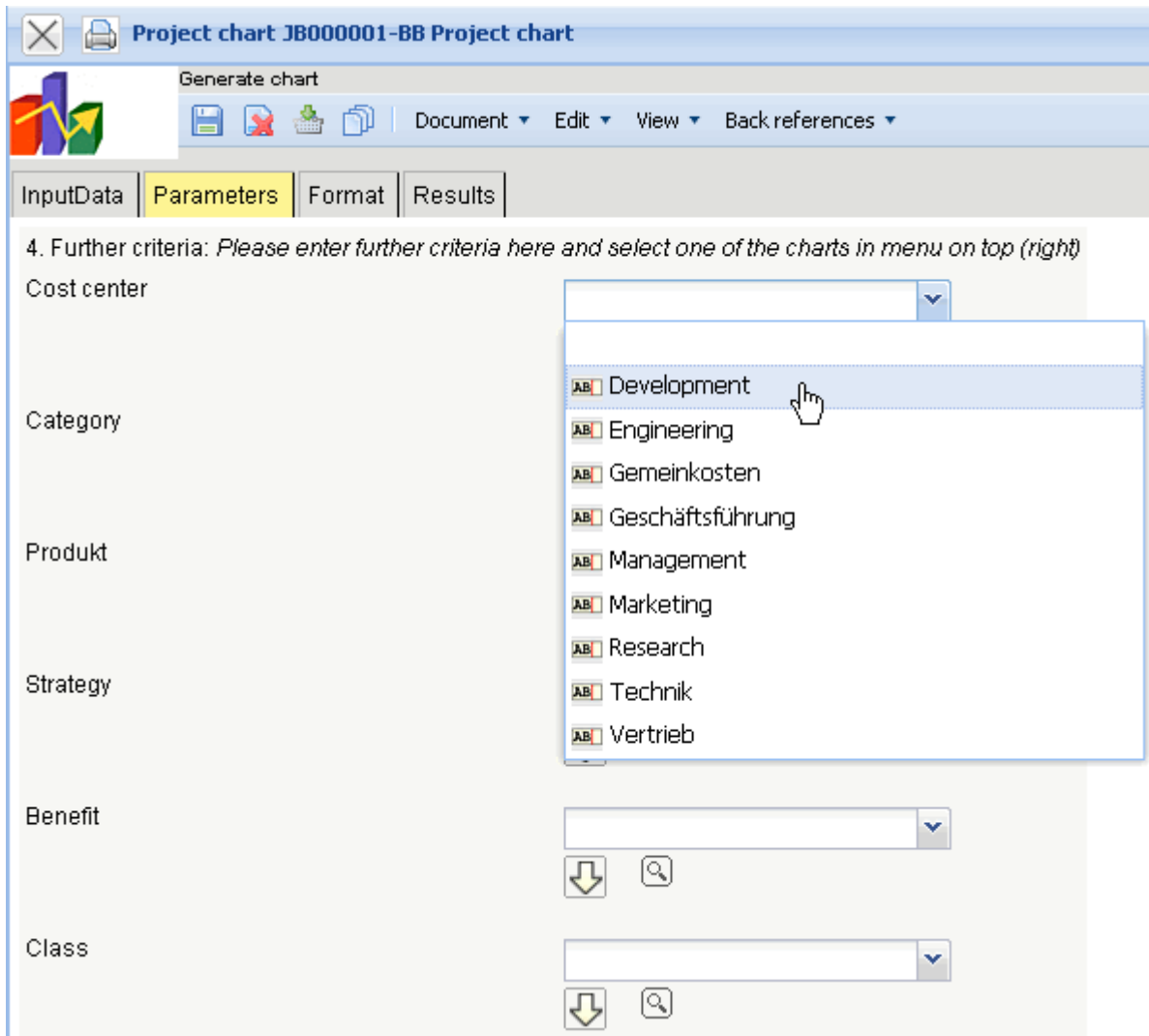
The third possibility to select the input data, is by using the advanced search. Here, appropriate queries are stored, which can be used immediately. In the example, all top projects with the status „active“ are transferred to the input data.

Search:

Search word: Top

Category:

Input data: No entries



In the example, all projects are evaluated, which are applied to the cost center „development“, a project class as a must/shall project ...

**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

| <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.

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 ...

Class

**AB** <sup>[1]</sup> 2 - Soll  
 **AB** <sup>[2]</sup> 3 - Muss

Activity

Priority

Period

External order / project

**AB** <sup>[1]</sup> 1

Take unit of employee

ShowDocumentsWithoutTrackedTime

Jobs in detail

OneLinePerPeriod

Only top projects

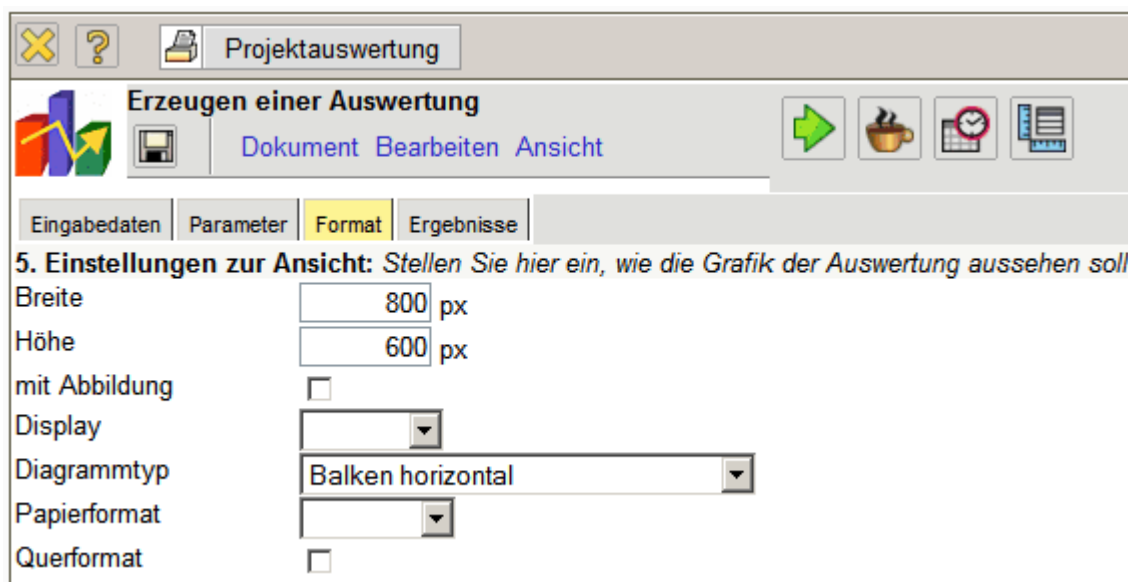
IntersectionFilter

ApplyFilterOnSubProjects

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

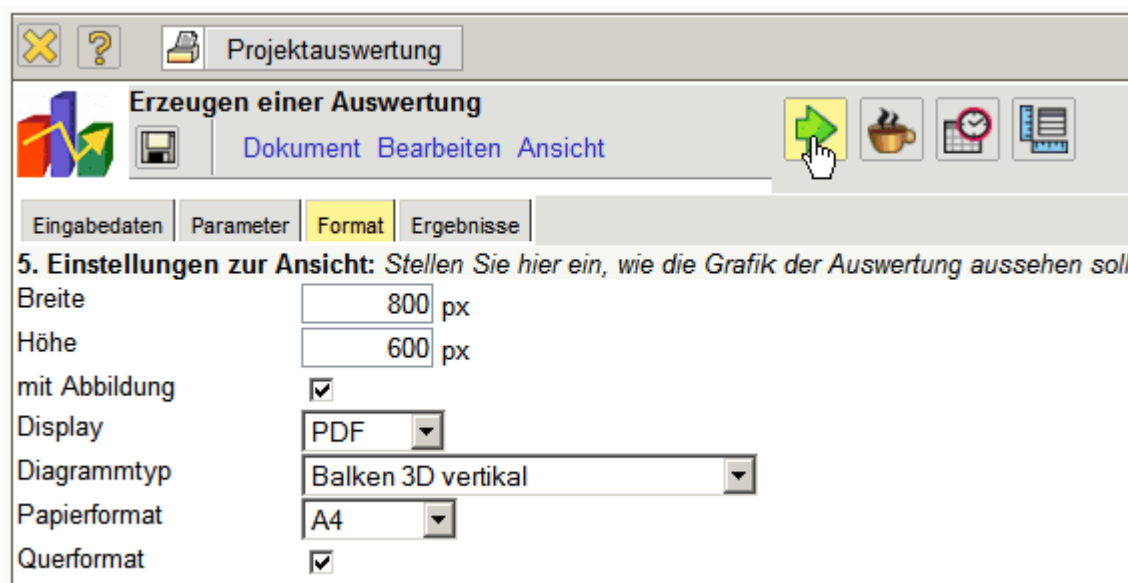
| Arbeitspakete Plan/Ist     |                                     |                     |          |         |          |           |             |            |            |                      |        |
|----------------------------|-------------------------------------|---------------------|----------|---------|----------|-----------|-------------|------------|------------|----------------------|--------|
| 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                | Batzreck 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               | Batzreck 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.



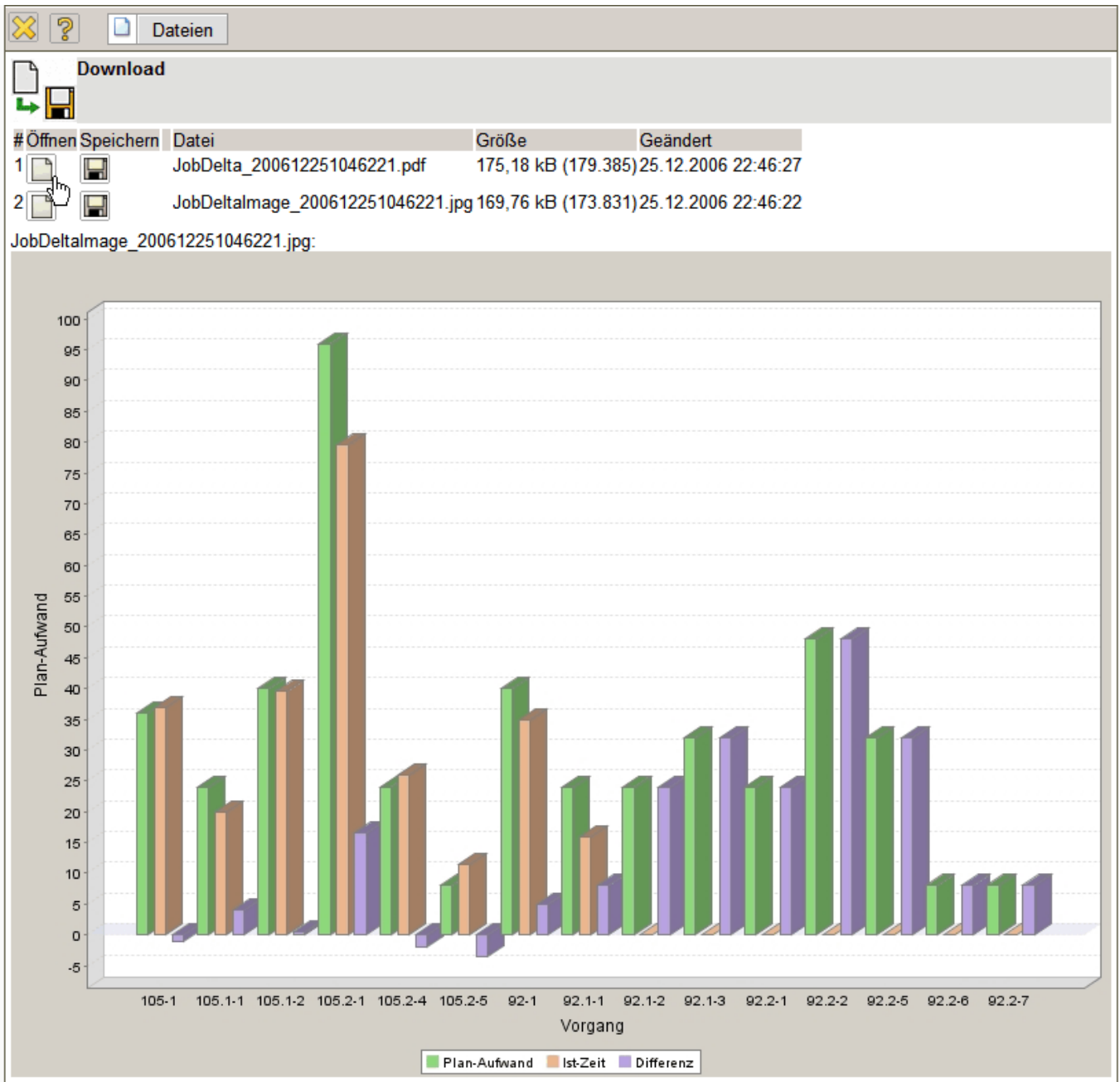
If alternative output formats are desired (by default, all reports are generated in HTML within the application) the output format can be chosen in the element "display".

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]

Datei Bearbeiten Anzeige Dokument Werkzeuge Fenster Hilfe

Suche im Web Y! YAHOO! TOOLBAR Gratis

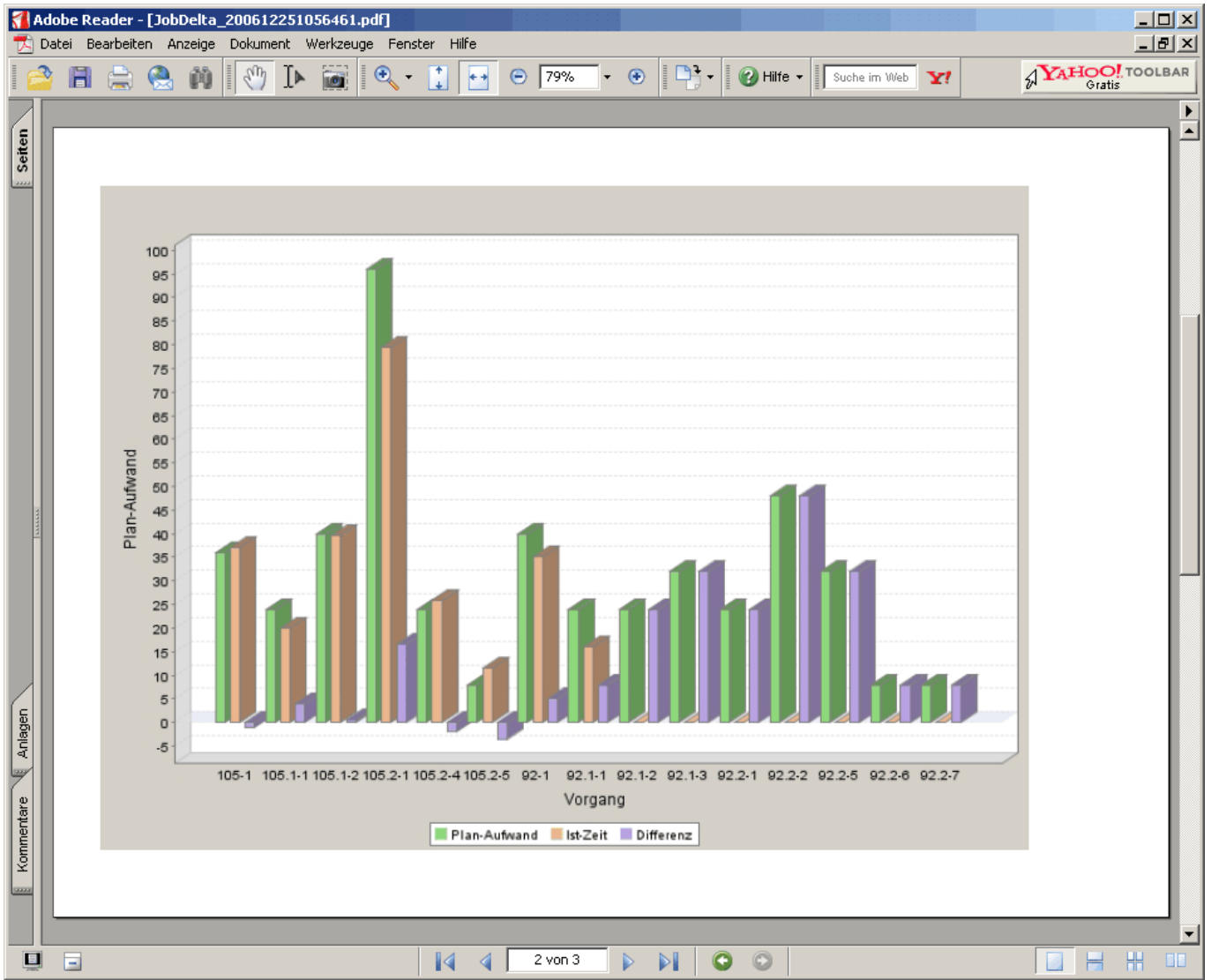
### Arbeitspakete Plan/Ist

| 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            | Batzek 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    |             |            |            |                      |        |

1 von 3

... (here with Adobe Reader).





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

The interface shows the 'Ergebnisse' (Results) tab. It includes a title '6. Ergebnisse: Hier finden Sie die Ergebnisse bereits durchgeführter Auswertungen' and a control for 'Max. Anzahl Ergebnisse' set to 10. Below, a list of results is shown, each with a checkbox and a document icon. The second result is highlighted:

- [1] 04 - Arbeitspakete Plan/Ist Projektauswertung 25.12.2006 22:56:43
- [2] 04 - Arbeitspakete Plan/Ist Projektauswertung 25.12.2006 22:46:18
- [3] 04 - Arbeitspakete Plan/Ist Projektauswertung 25.12.2006 22:43:24
- [4] 04 - Arbeitspakete Plan/Ist Projektauswertung 25.12.2006 22:42:06
- [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=1260794671](https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_3:3.12_auswertungssystem&rev=1260794671)



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