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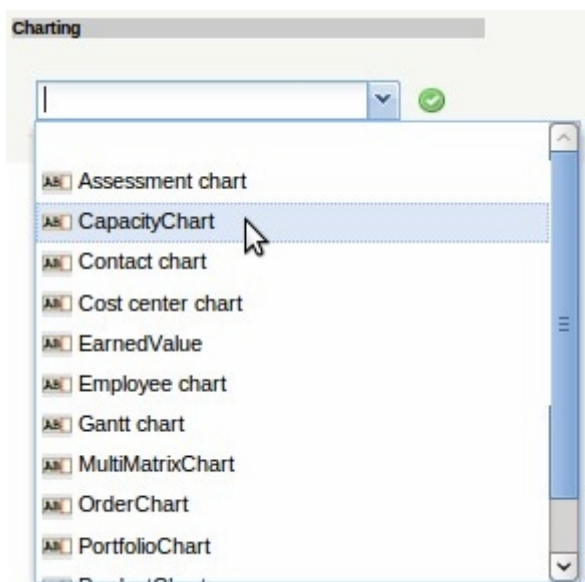
3.12 Chart System

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.

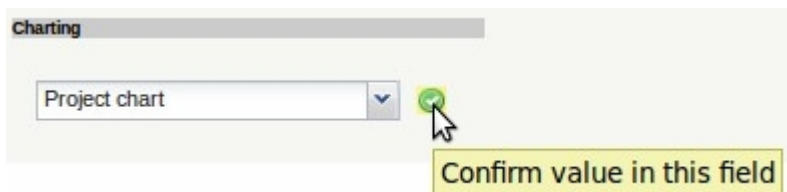
Applying the Chart System

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] [green checkmark]

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] [magnifying glass icon]

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

3. Main parameters: *Please select parameters:*

Chart period: [dropdown]

Start: [text box] [calendar icon] [dropdown]

End: [text box] [calendar icon] [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 ...

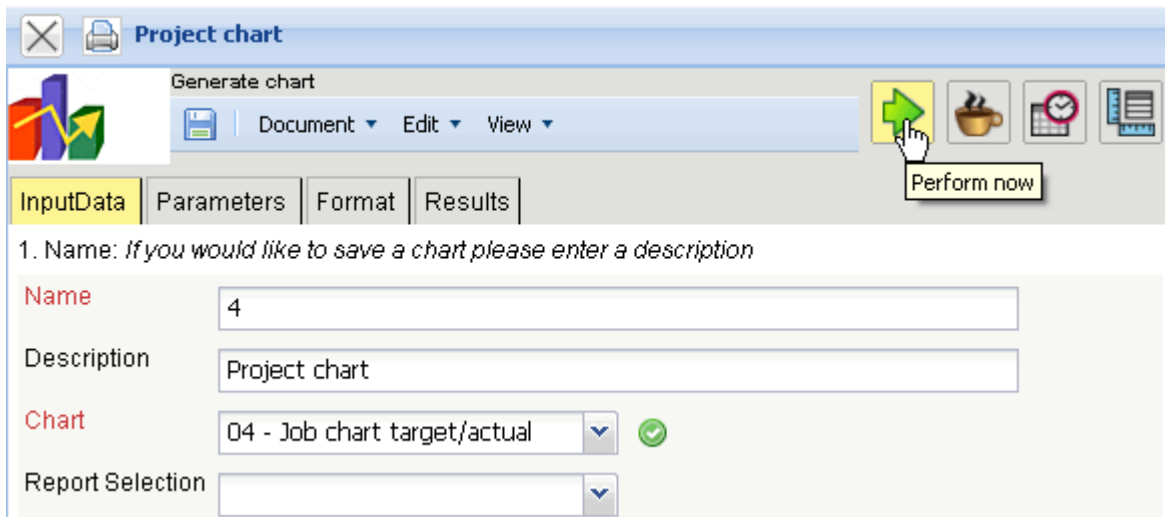
3. Main parameters: *Please select parameters:*

Chart period: Current year

Start: 01.01.2009

End: 31.12.2009

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

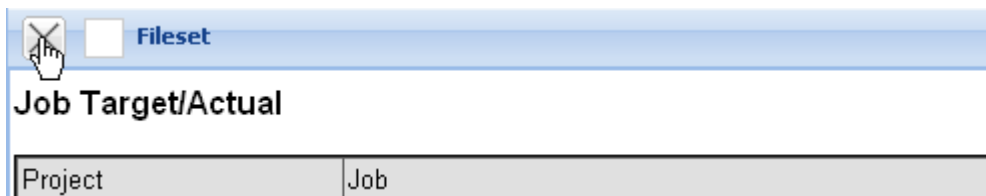


When the chart results are generated, the system presents the results in the browser. This chart contains information related to the projects, processes and/or jobs and employees, the planned and actual times with remaining time/effort and the corresponding difference (plan - actual), the planned completion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

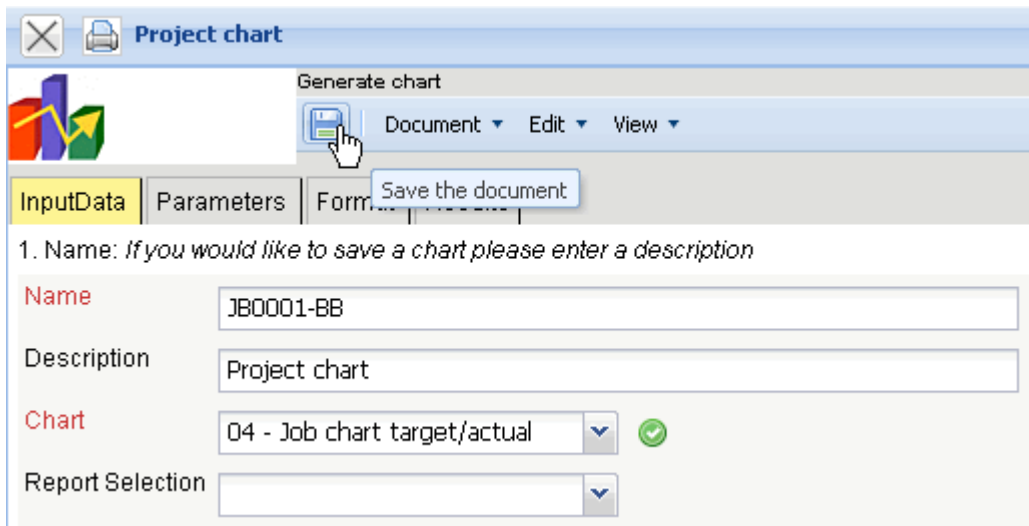
Job Target/Actual


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				

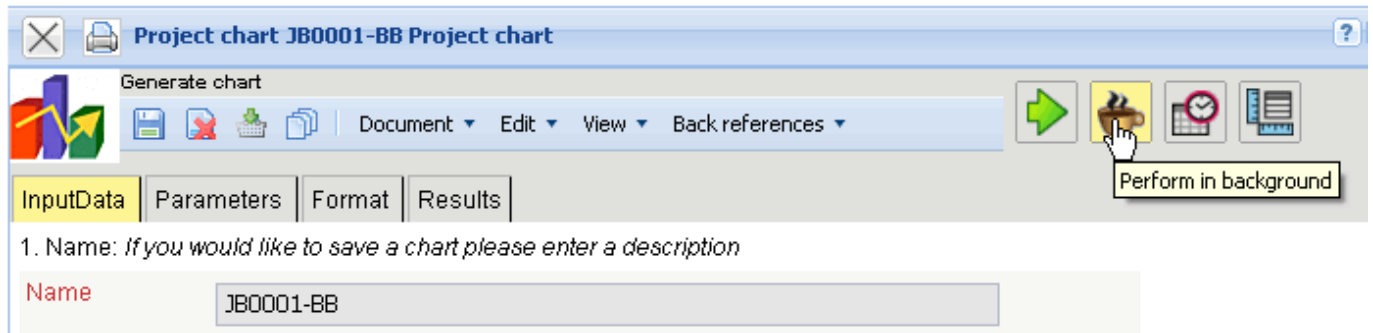
After closing the chart results, the project chart block is displayed once again.



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



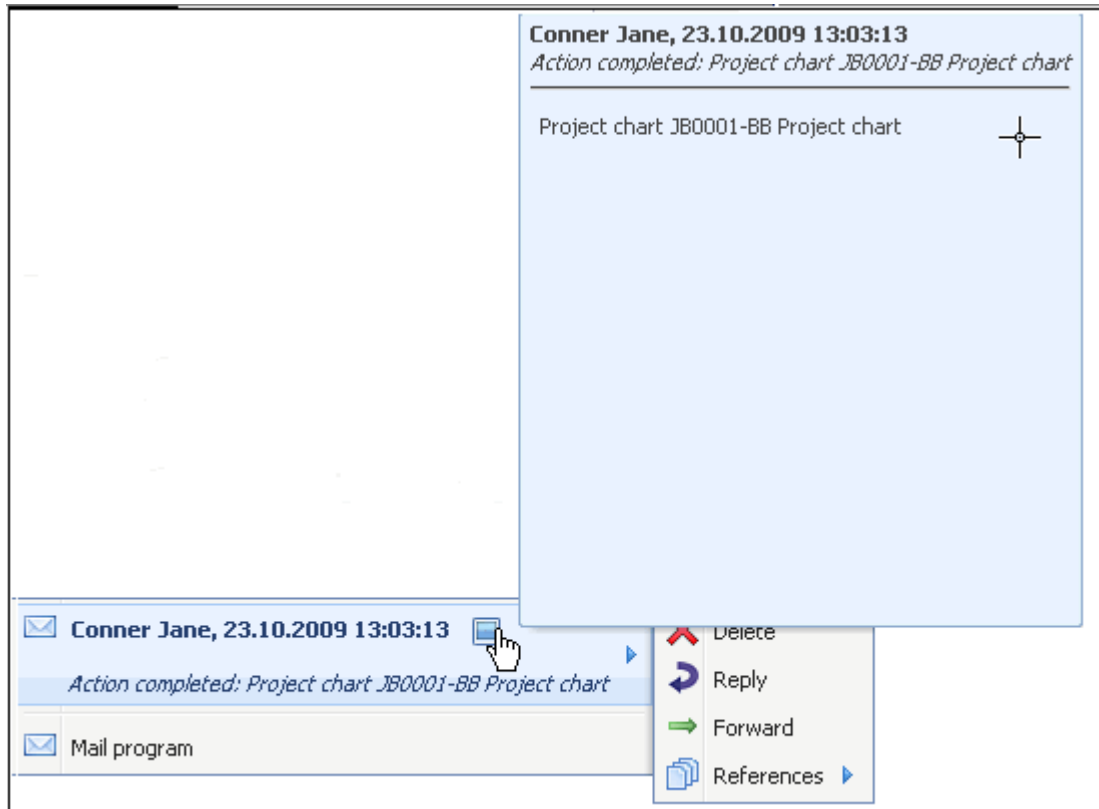
Using the  button, charts can be started in the background.



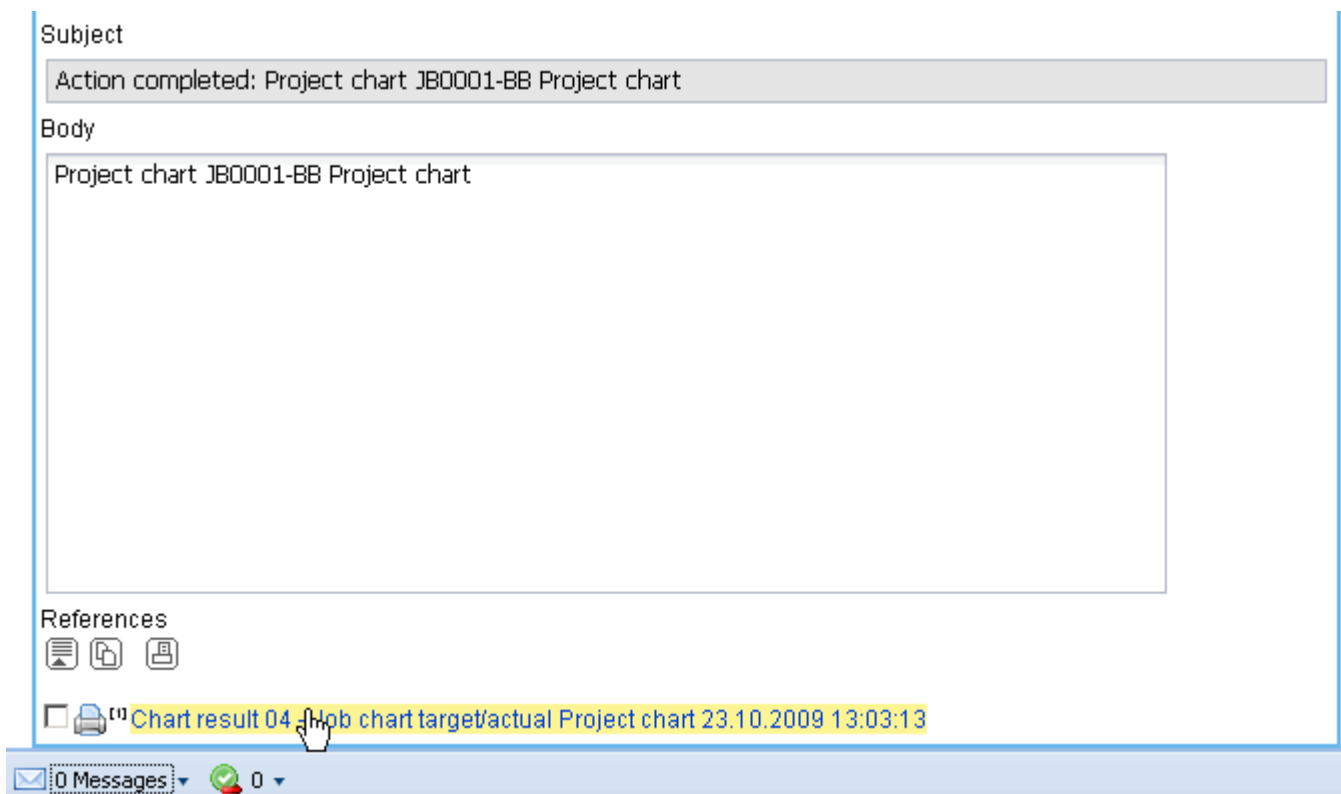
The user is informed of the background process by the system and displays ...



... 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

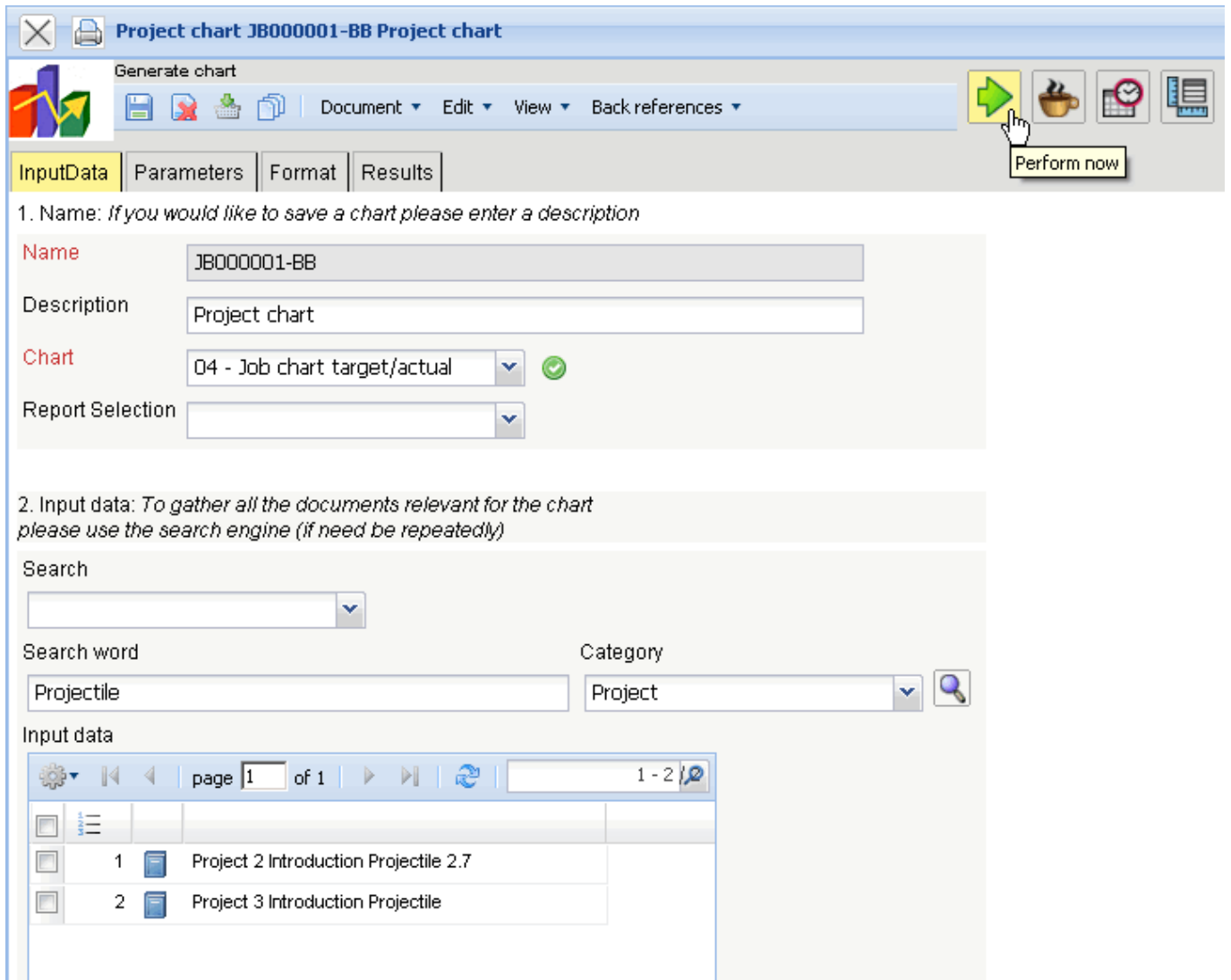
Find

Input data

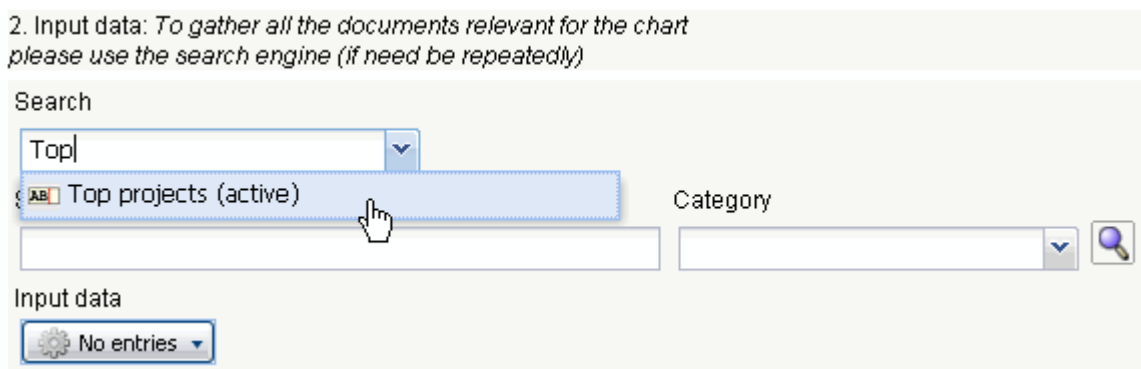
Page	Item	Description
1	1	Project 1 Introduction Projectile 2.5
1	2	Project 1.1 Planning
1	3	Project 1.2 Customizing
1	4	Project 2 Introduction Projectile 2.7
1	5	Project 2.1 Planning
1	6	Project 2.2 Customizing
1	7	Project 3 Introduction Projectile
1	8	Project 7 Update Projectile
1	9	Project 7.1 Introduction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

... are used as input data.

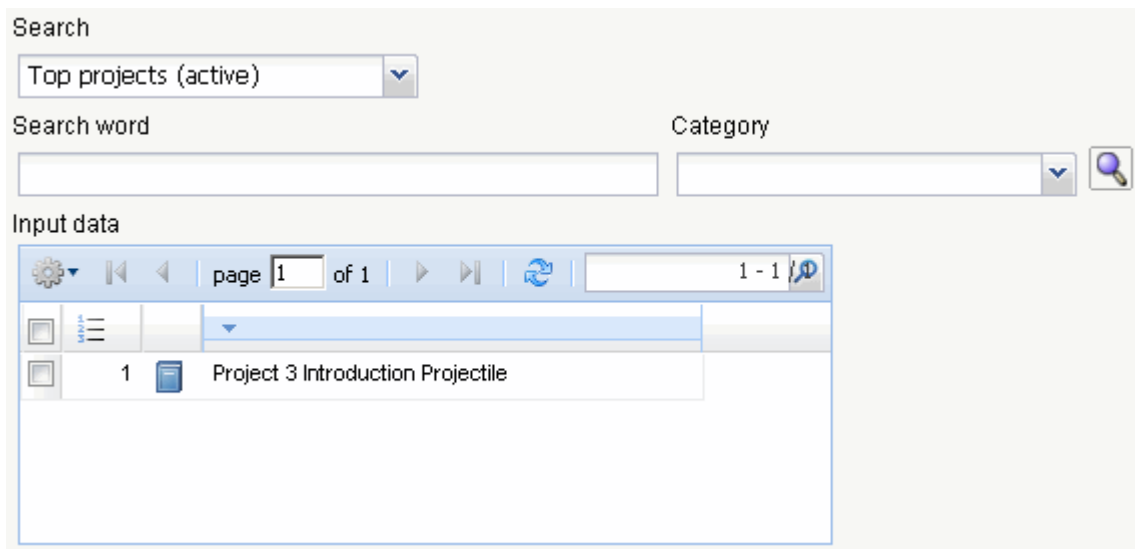
This process can be performed a multiple amount of times (with various categories).



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

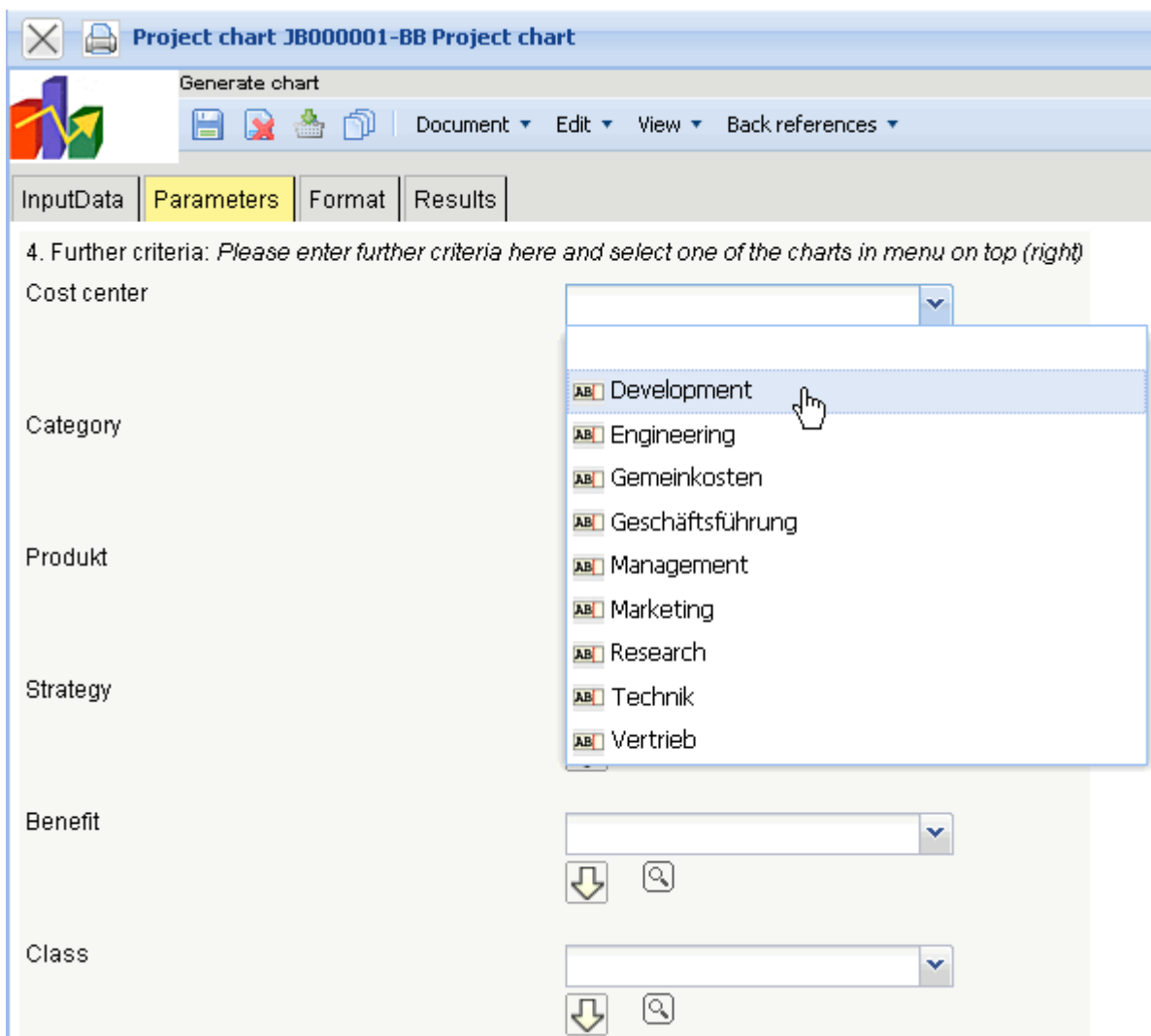


In the example, all top projects with the status „active“ are transferred to the input data.



Then the view time span (3. Main parameters) and the further criteria are used (4. Parameters) to limit the results of the charts.

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



... a necessary project or an optional project and which has the status active or advance services.

Class [dropdown]
[down arrow] [list] [close] [copy] [paste] [refresh] [search] [print] [check]

AB^[1] 2 - Soll
 AB^[2] 3 - Muss

Activity [dropdown]
[down arrow] [search]

Priority [dropdown]
[down arrow] [search]

Period [dropdown]

External order / project [dropdown]
[down arrow] [list] [close] [copy] [paste] [refresh] [search] [print]

AB^[1] 1

Take unit of employee
ShowDocumentsWithoutTrackedTime
Jobs in detail
OneLinePerPeriod
Only top projects
IntersectionFilter
ApplyFilterOnSubProjects

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.

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.

Projektauswertung

Erzeugen einer Auswertung [arrow right] [coffee] [clock] [print]

Dokument Bearbeiten Ansicht

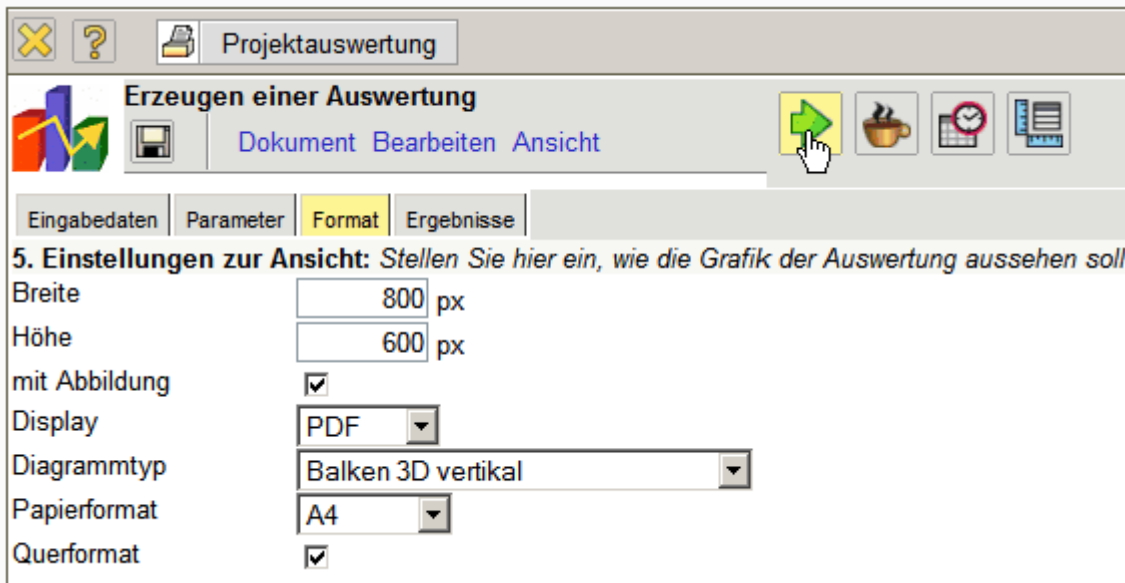
Eingabedaten Parameter **Format** Ergebnisse

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

Breite px
Höhe px
mit Abbildung
Display [dropdown]
Diagrammtyp
Papierformat [dropdown]
Querformat

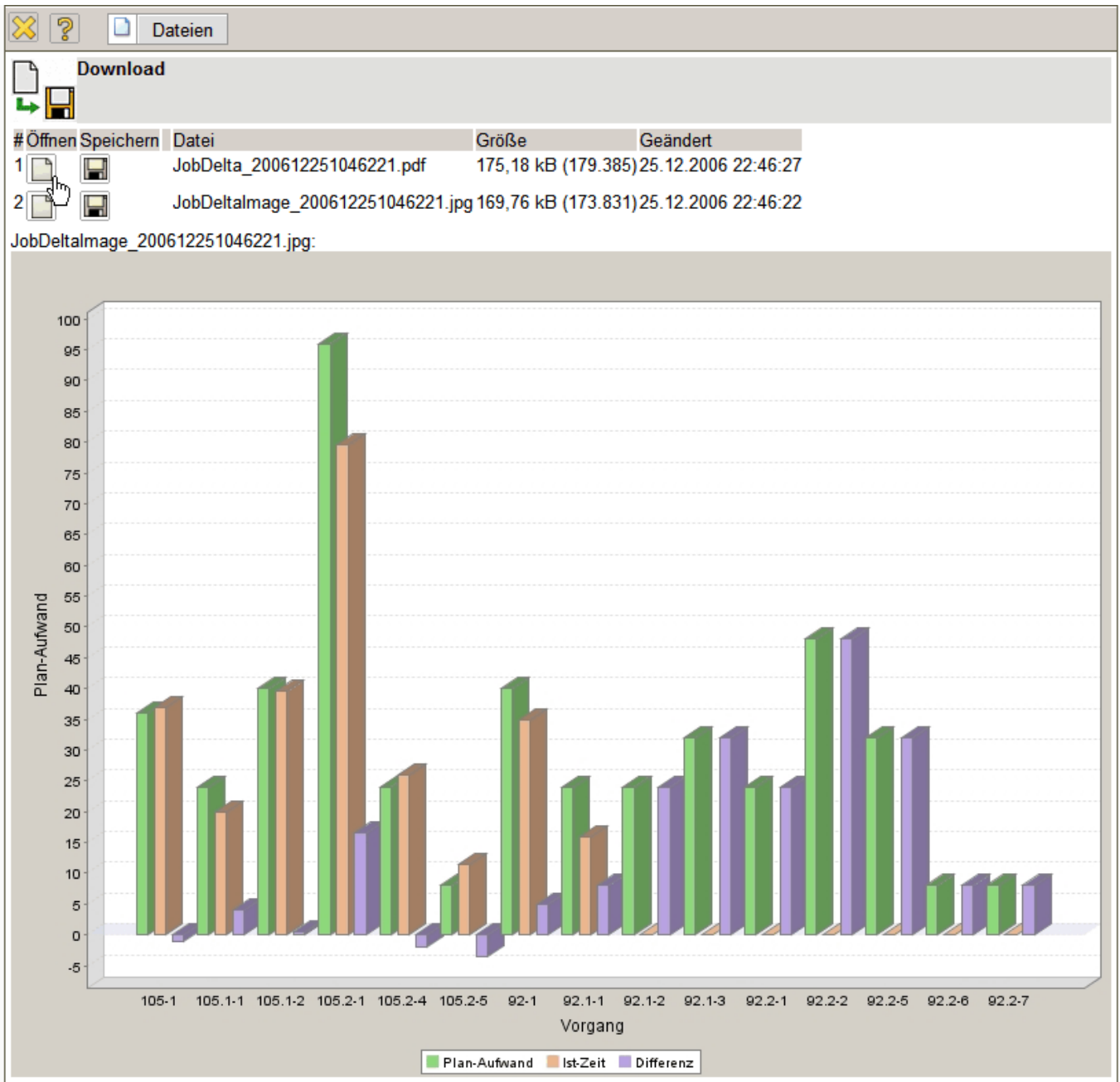
If alternative output formats are desired (by default, all reports are generated in HTML within the application) the output format can be chosen in the element “display”.

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

Seiten

Arbeitspakete Plan/Ist

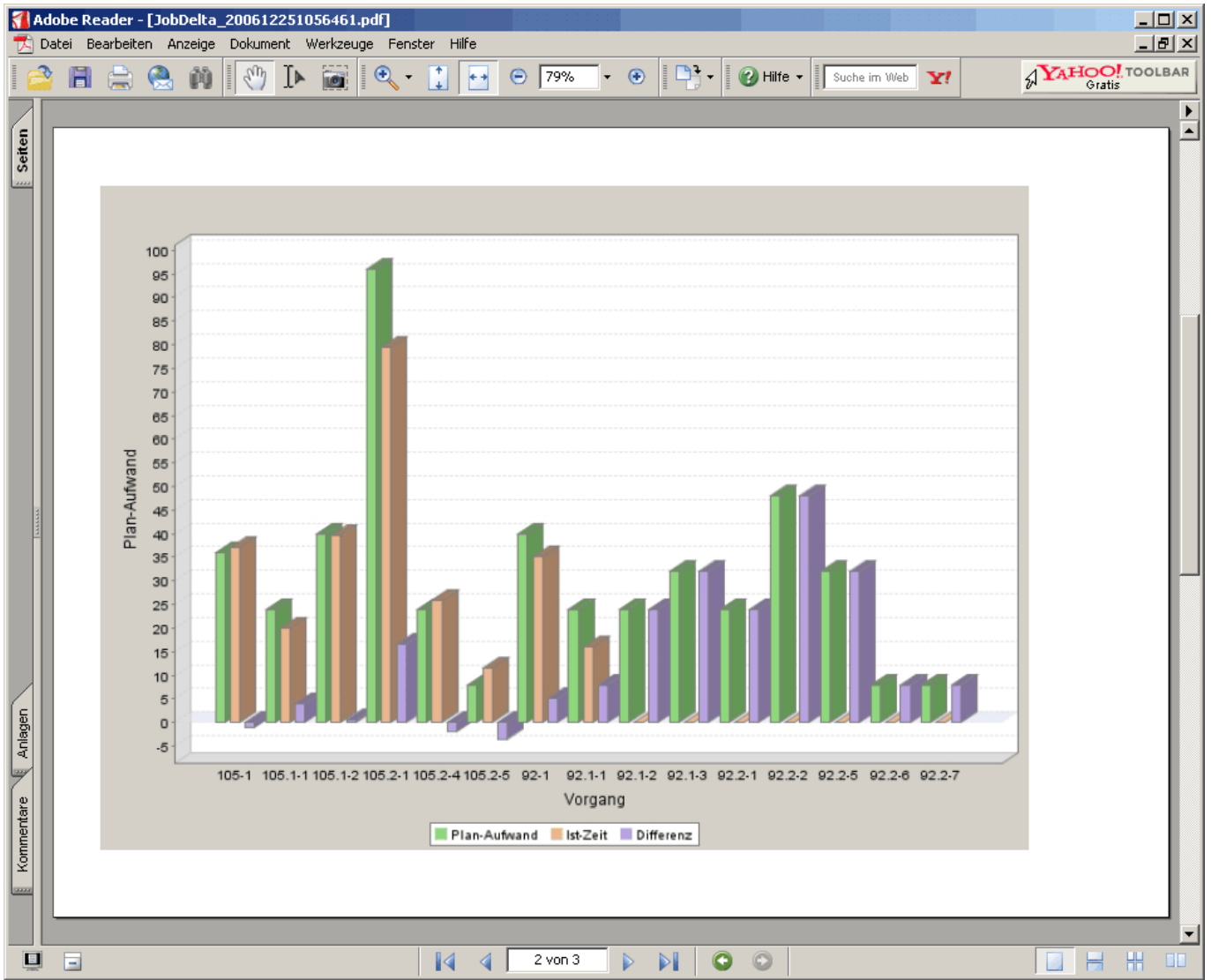
Projekt	Vorgang	Mitarbeiter	Plan [h]	Ist [h]	Rest [h]	Differenz	Plan-Beginn	Plan-Ende	Ist-Ende	Status	FG [%]
105 Implementation Projectile	105-1 Projektleitung	Schaub Peter	36,00	37,00	0,00	-1,00	09.02.2004	05.03.2004	06.03.2004	erledigt, verspätet	100,00
105.1 Planung	105.1-1 Konzeptgespräche	Schaub 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	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					

Anlagen

Kommentare

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... (here with Adobe Reader).



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

The interface shows the 'Projektauswertung' window with 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. The results list includes:

- [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.

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

Permanent link:
https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_3:3.12_auswertungssystem&rev=1260797594



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