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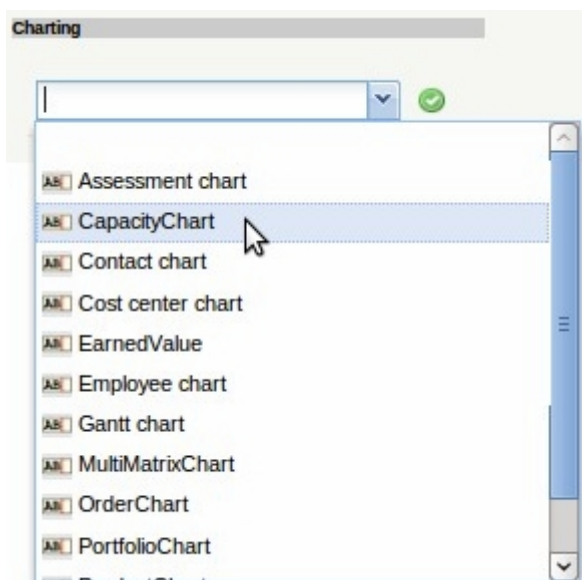
## 3.12 Chart System

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.

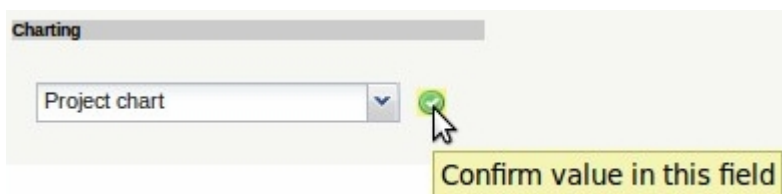
### Applying the Chart System

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]

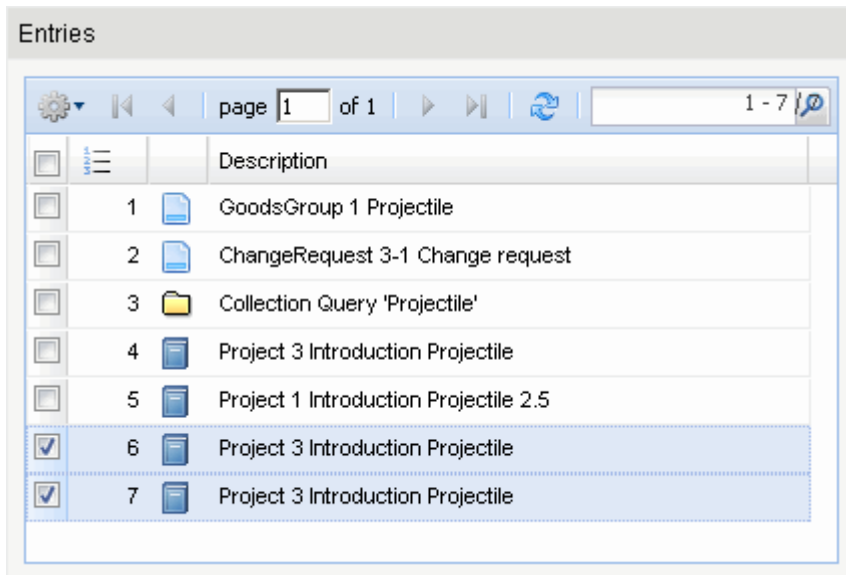
Start: [calendar icon] [dropdown]

End: [calendar icon] [dropdown]

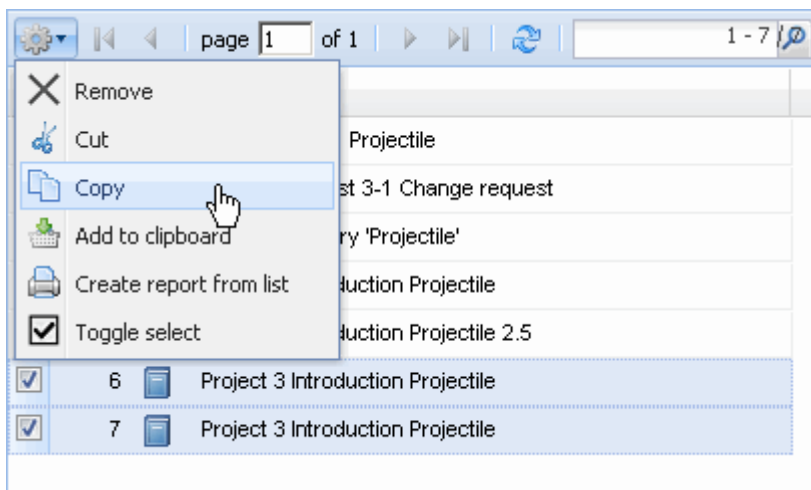
The first part (1. name) can be used for the naming the charts, if the chart is saved. Saving the chart is useful if the selection criteria for the charts remain constant, for example a list of all active projects for the current quarter. This saved chart can be copied to the clipboard or be used as 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, ...



... copied and ...



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 ...

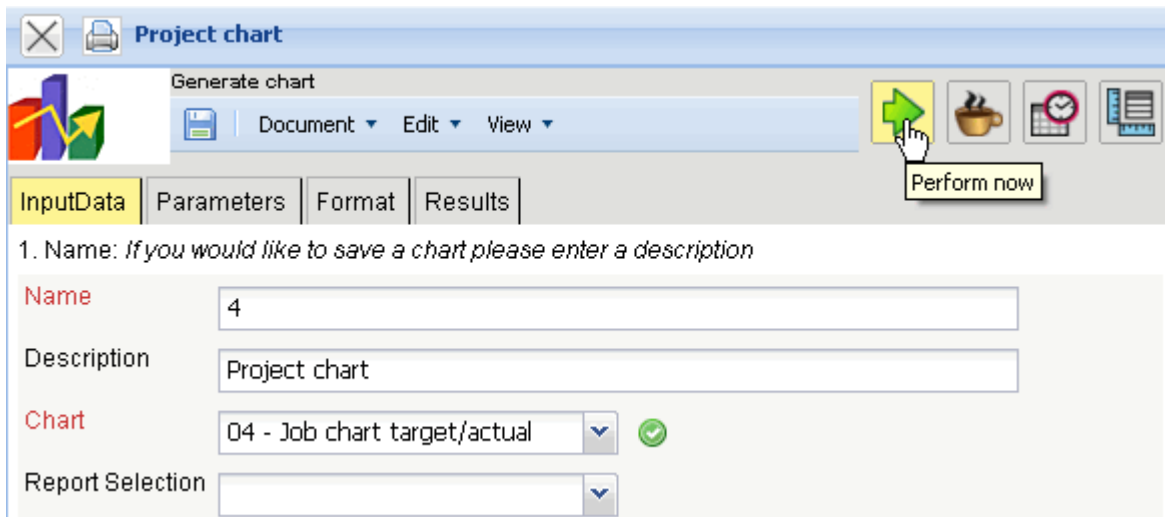
3. Main parameters: *Please select parameters:*

Chart period: Current year

Start: 01.01.2009

End: 31.12.2009

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

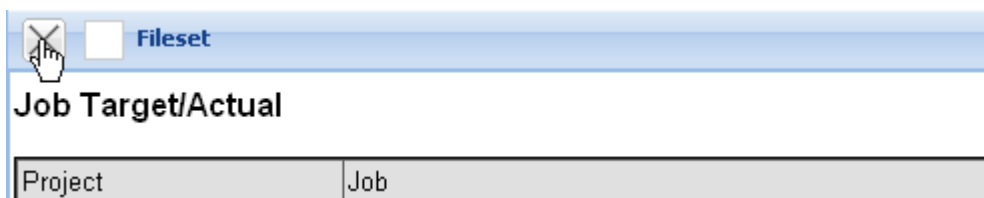


When the chart results are generated, the system presents the results in the browser. This chart contains information related to the projects, processes and/or jobs and employees, the planned and actual times with remaining time/effort and the corresponding difference (plan - actual), the planned completion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

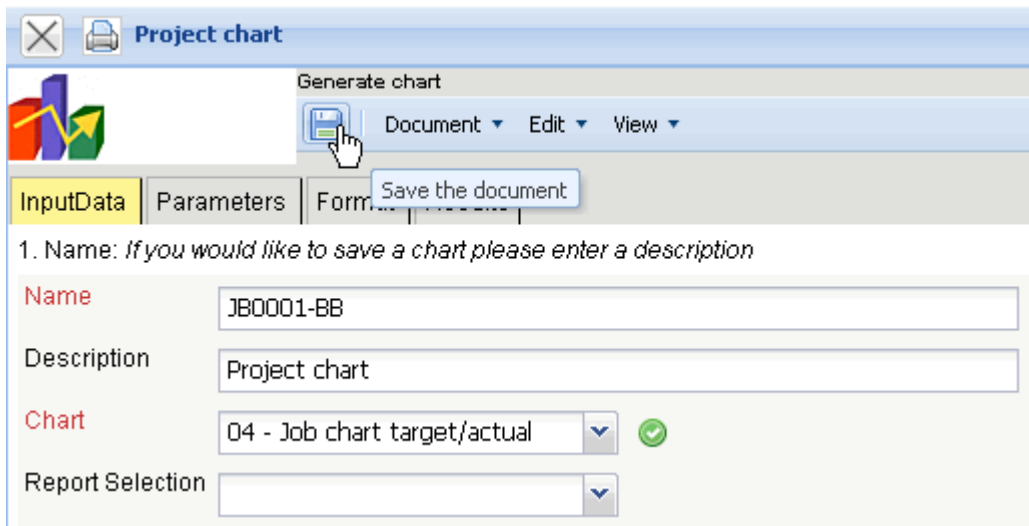
**Job Target/Actual**


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>				

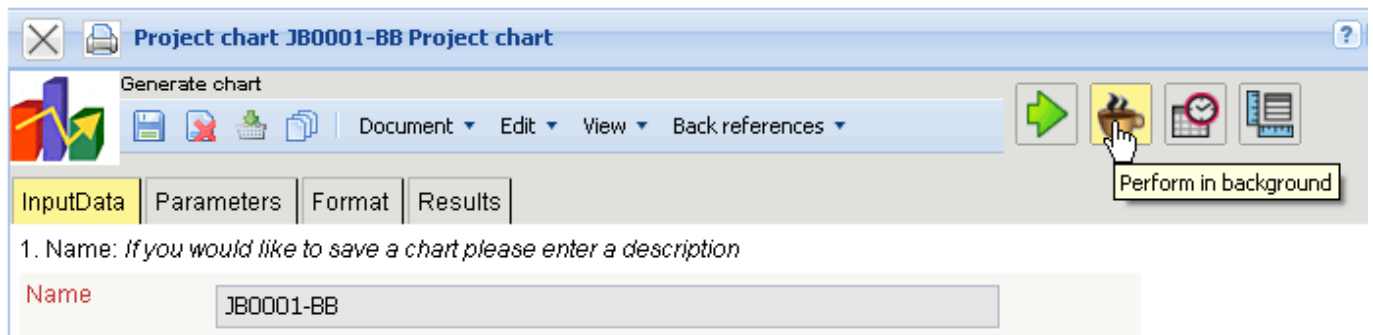
After closing the chart results, the project chart block is displayed once again.



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



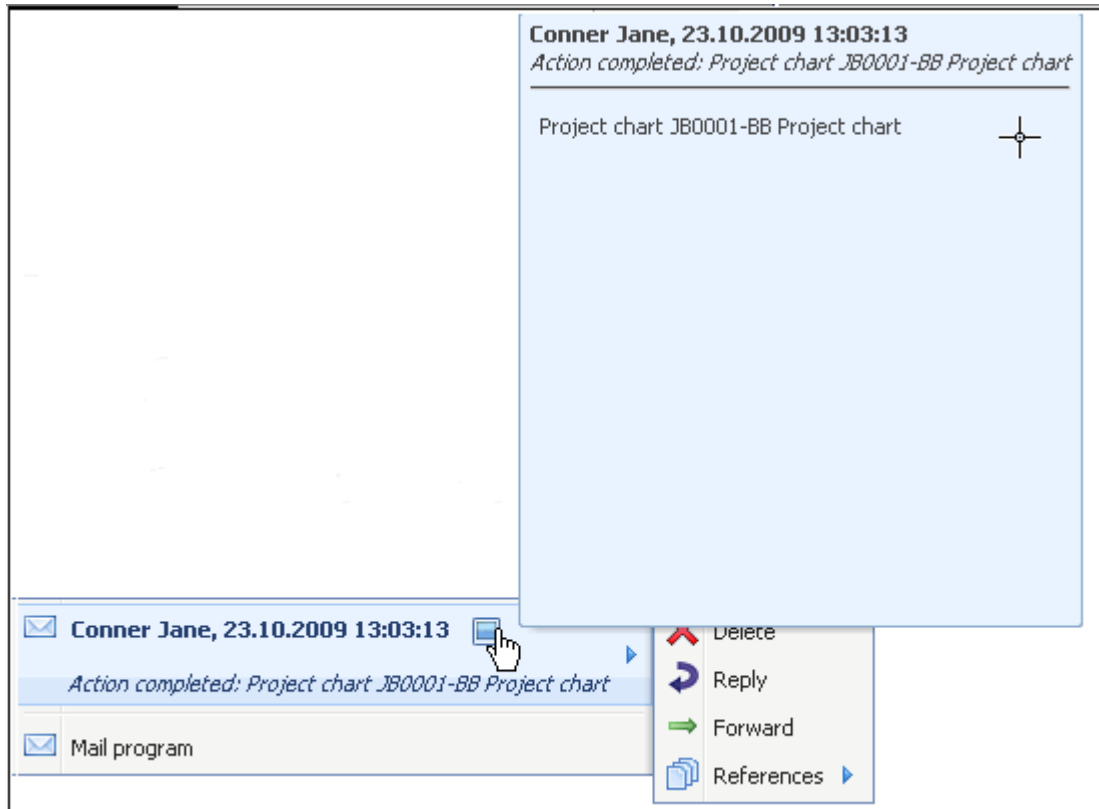
Using the  button, charts can be started in the background.



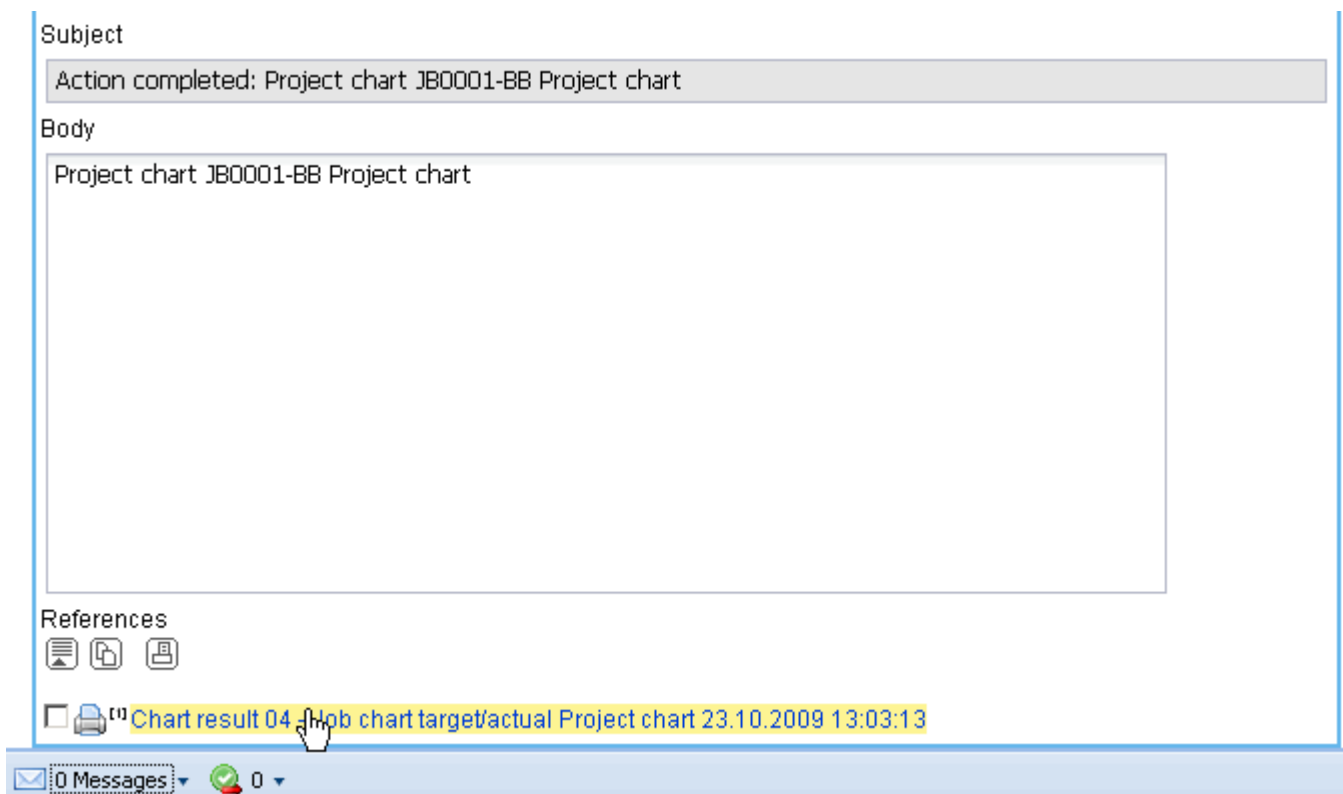
The user is informed of the background process by the system and displays ...



... 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**

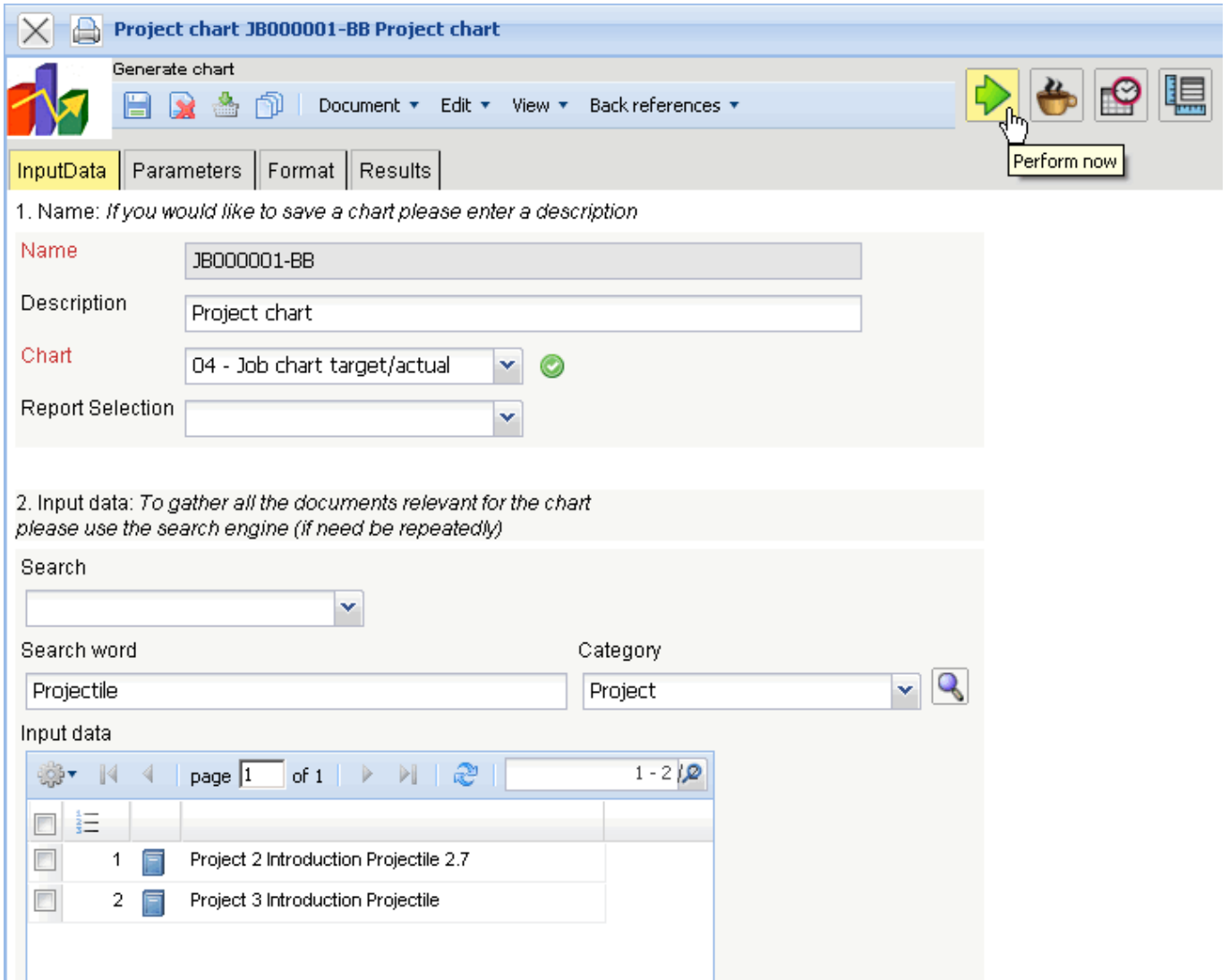
Project	Job	Employee	Planned [h]	Actual [h]	Difference [h]	EstimatedRemainingEffort	Begin	End	Closed	State
3 Introduction Projectile	3-1 Conception for combining Projectile and SAP CO/FI	Timothy Jones	16,00	38,00	-22,00	0,00	09.06.2009	30.10.2009		IN_PROCESS
3 Introduction Projectile	3-2 Installation 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" ...

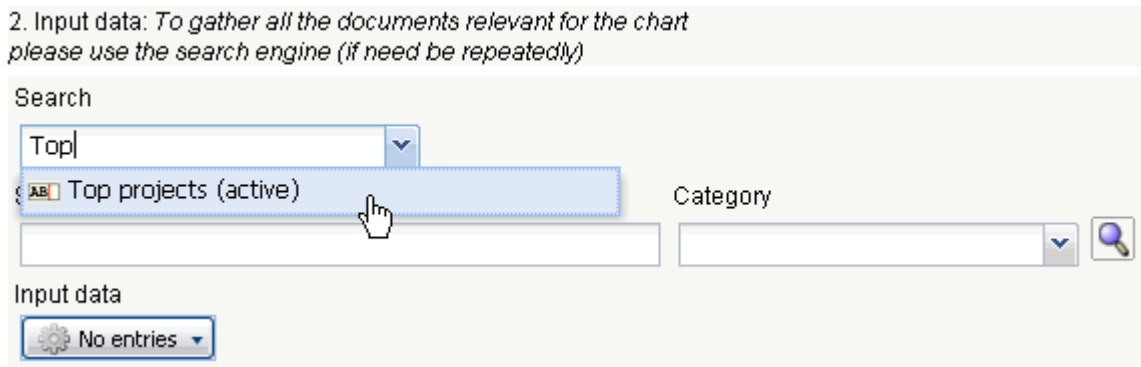
... are used as input data.

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

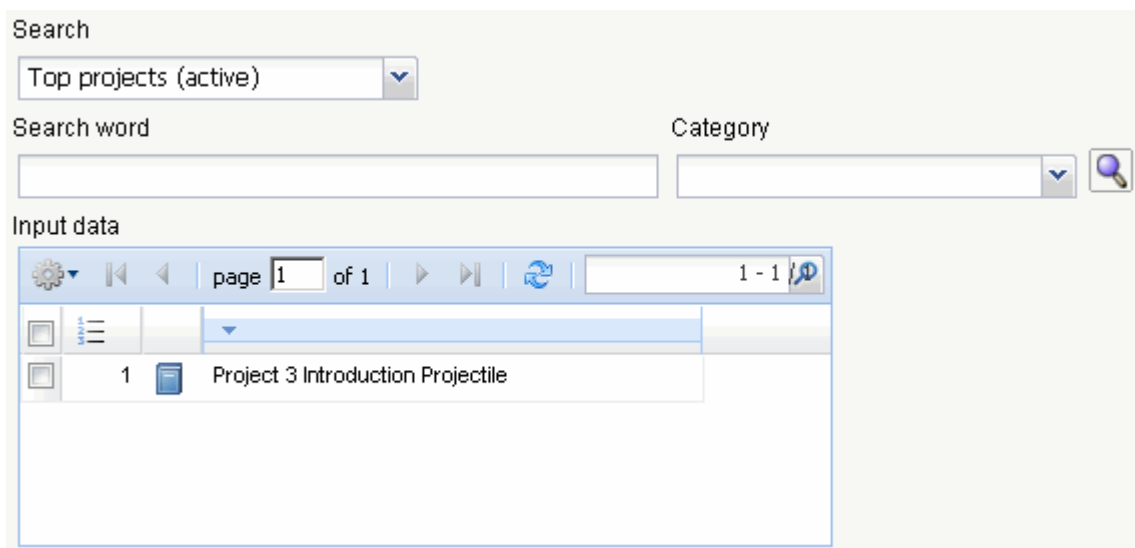




The third possibility to select the input data, is by using the advanced search. Here, appropriate queries are stored, which can be used immediately.

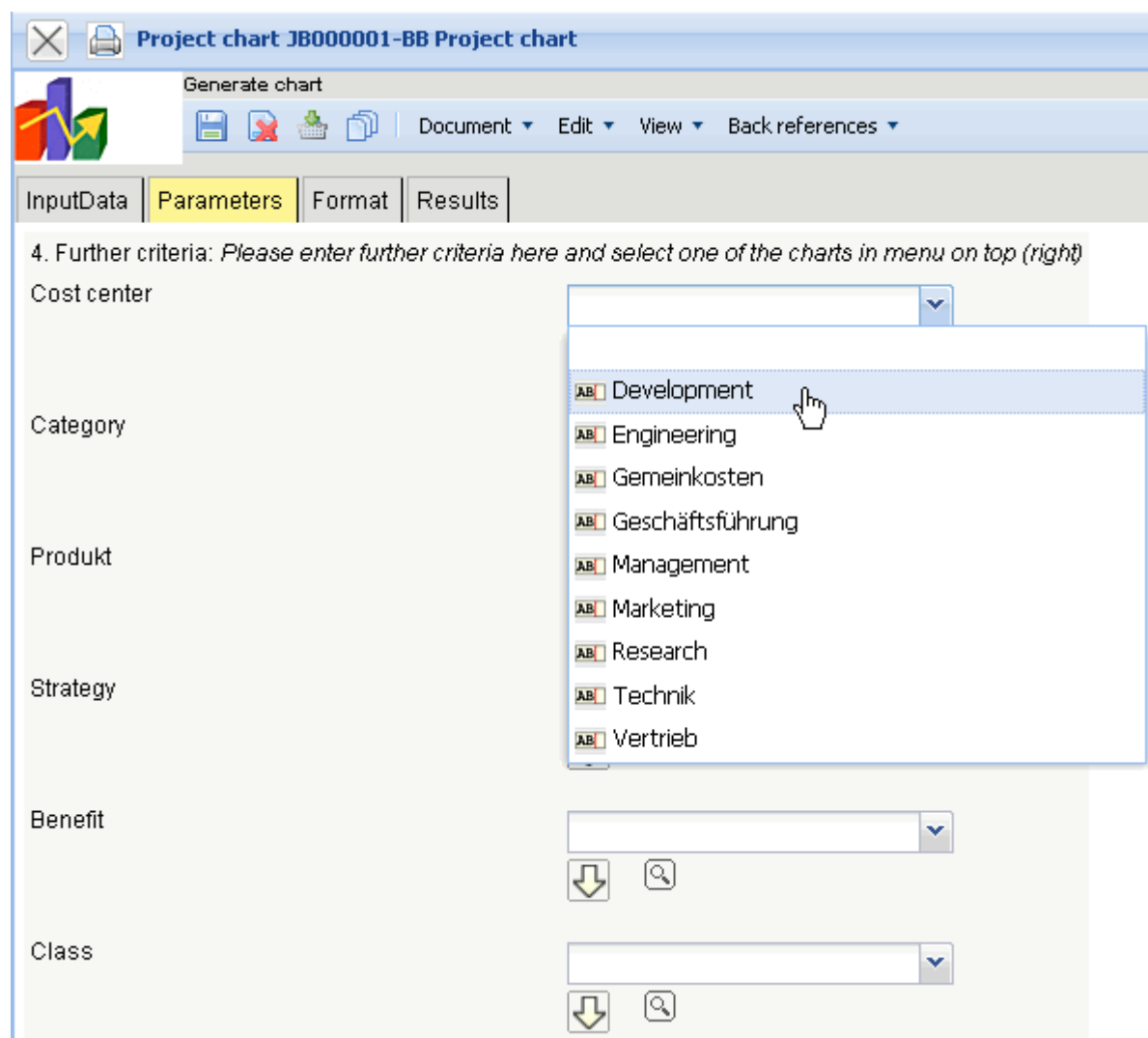


In the example, all top projects with the status „active“ are transferred to the input data.



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

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

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.

Project chart JB000001-BB Project chart

Generate chart

Document Edit View Back references

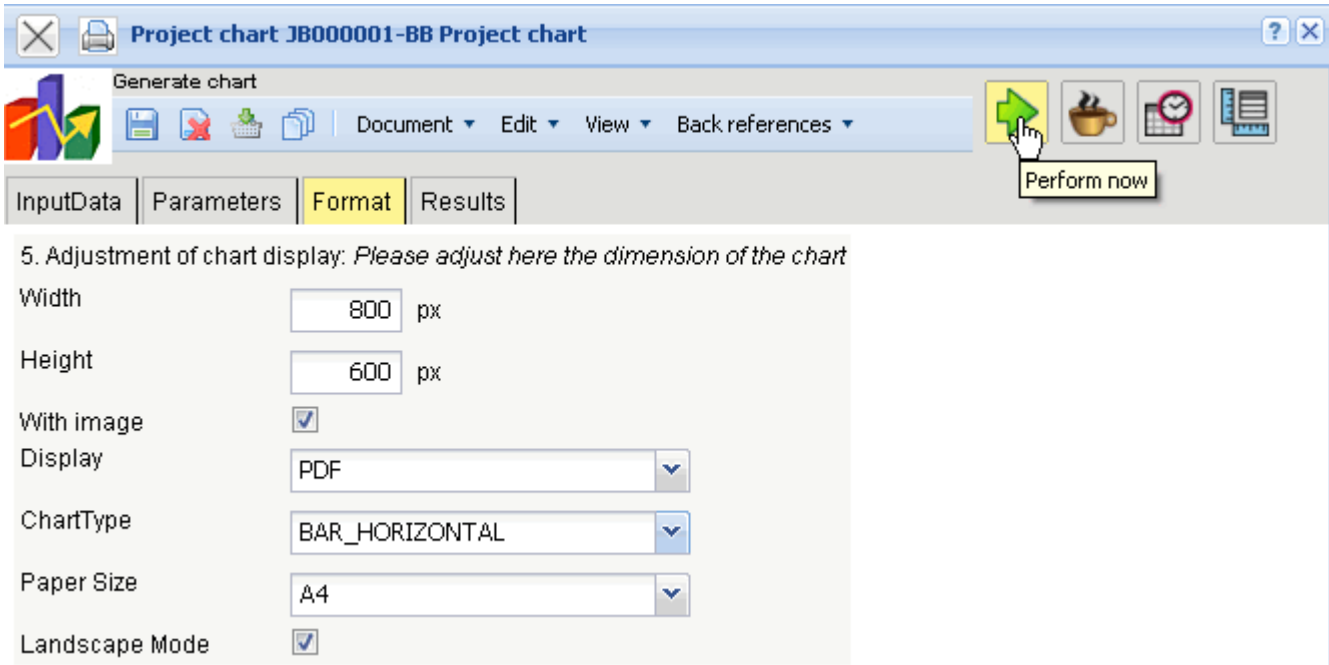
InputData Parameters **Format** Results

5. Adjustment of chart display: *Please adjust here the dimension of the chart*

Width  px  
Height  px  
With image   
Display    
ChartType    
Paper Size    
Landscape Mode

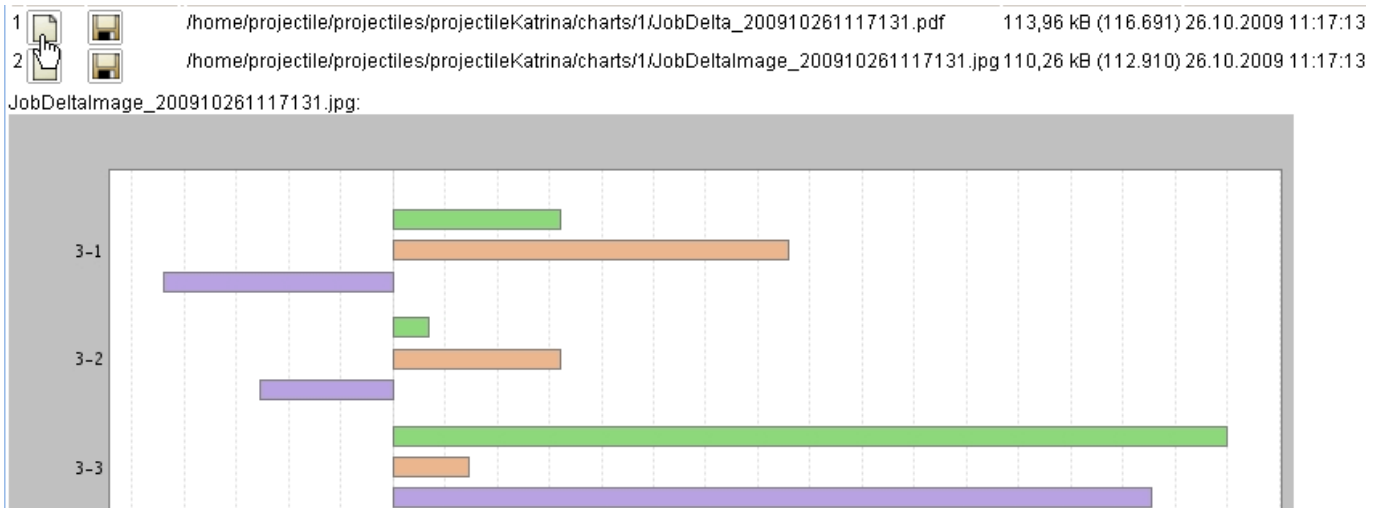
If alternative output formats are desired (by default, all reports are generated in HTML within the application) the output format can be chosen in the element “display”.

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



... in pdf output format.

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



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

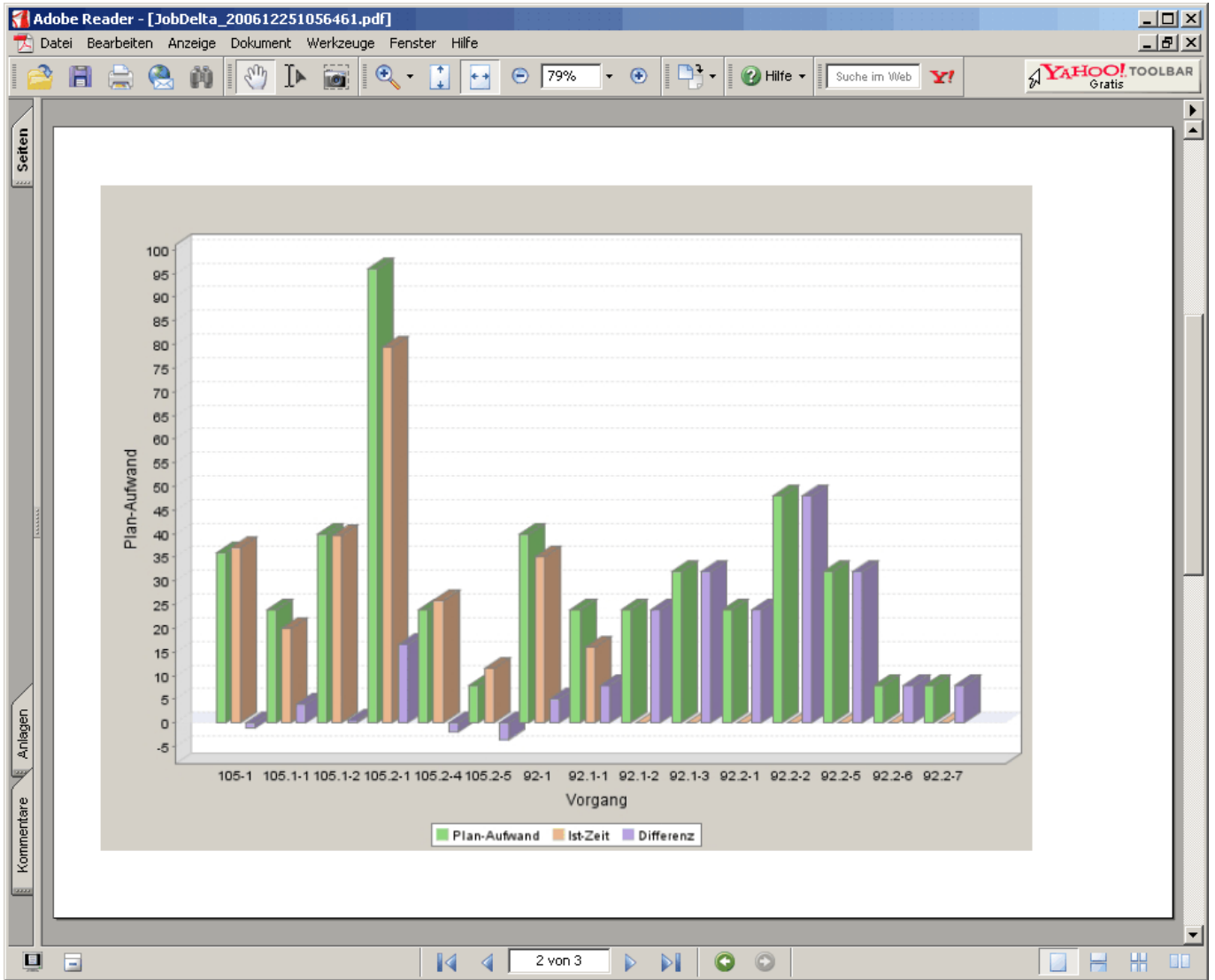
Suchen

### 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	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	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

210 x 297 mm Done 217.91.12.127

... (here with Adobe Reader).



In the “Results” tab, the chart results are administered.

The interface shows the 'Project chart' window with a 'Generate chart' menu and tabs for 'InputData', 'Parameters', 'Format', and 'Results'. The 'Results' tab is active, displaying a list of saved chart results. The 'MaxResults' field is set to 10. The results list includes two entries for '04 - Job chart target/actual Project chart' with timestamps from 2009.

6. Results: Here you find the results of charts previously performed

MaxResults

Results

- 04 - Job chart target/actual Project chart 26.10.2009 11:22:48
- 04 - Job chart target/actual Project chart 26.10.2009 11:22:39

**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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Permanent link:

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