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3.06 Reportgenerator "ReportMaker" (continued 5)

Key Figures

Definition:

Key figures are consolidated values, which are calculated using algorithms from the document data or other key figures, and which describe a document. An ID as a unique identification is assigned for each key figure. Projectile supports key figures for the forms contact, project, jobs and employee.

The use of key figures in Projectile allows the user to create total values, values for any point in time and values for any time period. The values which are created by key figures are marked with a creation date, so that they can be stored and reused without a re-calculation. Furthermore, each key figure can be assigned to a document, and can be integrated by key figures in the screen views and in reports.

Usage:

After a project, a job or an employee has been chosen by using the search function in Projectile, clicking on "Report" opens the Report-Designer. Here are the key figures in the column "column content", where they are identified by an asterisk. After one or several key figures have been selected, it is necessary to select '(periods)' in the same column. Then, a time interval should be defined for the key figures. Select the "time interval" in the drop down box, for example "current month", and then select a period, for example, "weekly". Additionally, the creation of new key figures for a defined period of time can be blocked by using the "Max figures age".

Afterwards an aggregate type for forming sums for the key figures. In the row of the key figure, in the drop down box "Periodic", select either "Total" = the entire static value including the non-visible values, "periodic" = the timed limit of the total value, "sum" = the sum of the visible values and "accumulated" = the sum of the periodical determined values.

After clicking save, go back to the dialog field, and also click save, an output format is selected and "Show Reports" is clicked. The report with the key figures is generated and is available for further usage.

Reference:

Customer Form:

Name	Description	Type	SubTyp	ID	Standard yes/no
Incoming Invoice	Incoming invoice amount of the contact, the sum of the contact, sum of the incoming invoice positions, which refer to the contact, Limit: date of the incoming invoice	FLOAT		IncomingInvoice_Tracked_Customer	yes
Offer Tracked	The basis of these key figures is the data of the offer. The net amounts of the offer values of all projects of the customer with the status "offer included" are calculated here. When limited, the date of offer is used.	FLOAT	MONEY	Offer_Tracked_Customer	yes
Order Value	The order value of the supplier, sum of the order positions which refer to the supplier (gross amount), Limit: date of order	FLOAT		OrderValue_Tracked_Customer	yes
Order Confirmation Tracked	The basis of these key figures is the data of the order confirmation. The net amounts of the orders of all projects of the customer with the status "offer confirmation included" are calculated here. When limited, the date of the order is used.	FLOAT	MONEY	OrderConfirmation_Tracked_Customer	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Profitability Tracked	<p>Profitability = (revenue - costs) / revenue, revenue is the actual revenue and is estimated for fixed price projects based on the degree of completion. Basis of this calculation should not be the "pure" recorded time, but should be calculated in percentage - in relation to the daily working times of 8 hours. In the evaluation of fixed-price projects with the aid of the degree of completion, the true revenue is considered only with the final bill (fixed price or amount of payment invoices = 100%). For all other states (complete <100%), the fixed price (orders, if filled - otherwise offer value when filled - otherwise plan revenue after adding surcharges) is used and this value is multiplied with the degree of completion / 100.</p>	FLOAT		Profitability_Tracked_Customer	yes
Estimated Sales	Order value in the sales pipeline multiplied with the probability	FLOAT	MONEY	Sales_Estimated_Customer	yes
Planned Sales	Planned order value, order value in the sales pipeline	FLOAT	MONEY	Sales_Planned_Customer	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Supplier Budget	Sum of the budgets of the order positions, which belong to the order of the suppliers. Budgets have no fixed date, but margin, overlapping charge	FLOAT		SupplierBudget_Tracked_Customer	yes
Supplier Turnover	Sum of the incoming invoice positions, which refer to the project and are included into the outgoing invoices.	FLOAT		SupplierTurnover_Tracked_Customer	yes
Time Billed	Billed effort/time from included job times, the time limit is based on the date entries of the billed time entries	FLOAT	MONEY	Time_Billed_Customer	yes
Turnover Tracked	The basis of these key figures is the data of the invoice. The net amounts of the invoice amounts of all projects of the customer with the status "offer confirmation included" are calculated here. When limited (if existent), the time span of the service, otherwise the date of the invoice is used.	FLOAT	MONEY	Turnover_Tracked_Customer	yes

Project Form:

Name	Description	Type	SubTyp	ID	Standard yes/no
Budget External Tracked	Total ext. amounts of all budgets of the project, Span: fully or partially overlapping	FLOAT		BudgetExternal_Tracked_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
BudgetInternalTracked	Total internal amounts of all budgets of the project, Span: fully or partially overlapping	FLOAT		BudgetInternal_Tracked_Project	yes
Planned Material Costs	Total ext. amounts material cost-Budget of the project	FLOAT		BudgetMaterial_Tracked_Project	no
Remaining Cost	Remaining budget on the basis of the difference of actual time and target time, also external hourly rate	FLOAT	MONEY	RemainingCost_Calculated_Project	no
Budget Third Party	Total ext. amounts FL-Budgets of a project	FLOAT		BudgetThirdParty_Tracked_Project	no
Planned Travel Cost	Total ext. amounts travel cost budgets of the project	FLOAT		BudgetTravel_Tracked_Project	no

Name	Description	Type	SubTyp	ID	Standard yes/no
Completion Calculated	<p>Degree of completion by calculation, not based on estimates, but purely on the basis of plan and actual. The basis of this key figure is the quotient of actual and planned time or (if available) the final employee estimate less the thereafter recorded services. This data is determined for each job and condensed to the projects. When defining the time span, either the plan and actual time or the estimates of the jobs are used on a daily basis.</p>	FLOAT		Completion_Calculated_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Completion Employee Estimated	<p>Key Figure: Degree of completion by employee estimate, i.e. estimates from TT. The basis of this figure is the tracking and recording system TimeTracker and the estimate completion dialog. Here, the remaining time and/or degree of completion for jobs are entered by the employee and, if necessary, corrected by the project manager in the dialog "estimate completion". When defining the time span, the estimates are used per day.</p>	FLOAT		Completion_EmployeeEstimated_Project	yes
Completion Manager Estimated	<p>Key Figure: Degree of completion through the manager's estimate, i.e. from the states documents, which depends directly on the project. The basis of this key figure is the degree of completion of the project. When defining the time span, the estimates per deadline are used.</p>	FLOAT		Completion_ManagerEstimated_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Cost Normalized	<p>This key figure calculates analogue to the key figure Work Cost Tracked* (project form), which multiplies the recorded actual time with the internal hourly rate of the employee. Basis of the calculation is not the "pure" recorded time, but the calculation of costs are in percentage - in relation to the daily working times of 8 hours. The time span is the date entries of the time recording.</p>	FLOAT	MONEY	Cost_Normalized_Project	yes
Cost Material Tracked	Total ext. amount of the costs	FLOAT		CostMaterial_Tracked_Project	no
Misc Cost Tracked	Total ext. other amounts of the costs	FLOAT		CostOther_Tracked_Project	no

Name	Description	Type	SubTyp	ID	Standard yes/no
Cost Performance Estimated	The CPI (Cost Performance Index) is the cost-related performance key figure of Earned Value Analysis. It is formed from the ratio of earned value and actual time. This means that with a CPI of greater than 1.00 (100%) the project results are rendered at a lower cost than originally planned, while a value of less than 1.00 (100%) exceeds the project's budget. Calculation: Planned time * degree of completion / actual time spent	FLOAT		CostPerformance_Estimated_Project	yes
Planned Cost Total	Total planned costs on the basis of jobs and budgets, internal costs	FLOAT	MONEY	Cost_Planned_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Cost Tracked	Internal job costs + costs from cost documents, such as receipts, driving, travel ... The basis of this key figure is the tracking and recording entries (Time Tracker) and the cost recording (drive, receipt, travel, foreign costs and foreign invoices). Here, the work cost tracked* and all internal costs (net amounts) of the entries for driving, receipts, travel, foreign costs and foreign invoices are totaled. When defining a time span, the recorded time and cost receipts are used per day.	FLOAT	MONEY	Cost_Tracked_Project	yes
Cost Third Party Tracked	Total ext. amounts of the costs	FLOAT		CostThirdParty_Tracked_Project	no
Travel Cost Tracked	Total ext. amounts of the costs	FLOAT		CostTravel_Tracked_Project	no
End Tracked	Key figure: end of time tracking, last time at which something has been recorded for a project, whether time, receipts, travel, travel, etc.	DATE		End_Tracked_Project	no

Name	Description	Type	SubTyp	ID	Standard yes/no
Incoming Invoice	Incoming invoice of the project, the total of the incoming invoice position items that reference the project, Time span: the date of the incoming invoice	FLOAT		IncomingInvoice_Tracked_Project	yes
Incoming Invoice Net	Incoming invoice of the project, the total of the invoice position items, which reference the project (net), Time span: Date of incoming invoice	FLOAT		IncomingInvoiceNet_Tracked_Project	yes
Turnover Chargeable	All billable times multiplied by the hourly rates, i.e., job times which can be billed in invoices. The basis of this key figure is the key figure "Chargeable Time*". This key figure is multiplied with the external hourly rate of the job (see pricing). When defining the time span, the time recording are used per day.	FLOAT	MONEY	Turnover_Chargeable_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Job Turnover Tracked	The basis of this key figure is the data of the invoice. Here the net amounts of the position items are calculated based on jobs of the project with the status "Invoice included". If the time span is defined, the performance period is used, otherwise the invoice date is used.	FLOAT	MONEY	JobTurnover_Tracked_Project	yes
Misc Cost Tracked	All costs except work costs: item sales, trips, travel, receipts, Time span: Date entris of the cost documents	FLOAT	MONEY	MiscCost_Tracked_Project	yes
Offer Value	The basis of this key figure is the data of the offer. Here, the net amounts of the offer value of the project with status "Offer included" are calculated. When defining the time span, the date of the offer is used.	FLOAT	MONEY	Offer_Tracked_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Order Confirmation Value	The basis of this figure is the data of the order confirmation. Here the net amounts of the orders of the project with status "Order Confirmation included" is calculated. When defining the time span, the date of the order is used.	FLOAT	MONEY	OrderConfirmation_Tracked_Project	yes
Order Value net	Sum of order positions that reference the project, Time boundary: order date	FLOAT		OrderValueNet_Tracked_Project	yes
Order Value	Sum of order items that reference the project (gross), Time boundary: order date	FLOAT		OrderValue_Tracked_Project	yes
Planned Working Days Project Passed	These are the elapsed days between the planned beginning and planned end. Weekends are not counted, but public holidays are, Time span: planned start and planned end of the project	FLOAT		PassedWorkingDays_Planned_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Profitability Tracked	<p>Profitability = (turnover - costs) / turnover, Turnover is the actual turnover and is estimated for fixed-price projects based on the degree of completion. The basis of this calculation should not be the "pure" recorded time, but should be in percentage - with relation to the daily working time of 8 hours. \\ In the evaluation of fixed-price projects using the degree of completion, the true turnover is only considered with the final bill (fixed price or total amount of advance payment invoices = 100%). For all other states (complete <100%) the fixed price (order value if filled - otherwise offer value when filled - otherwise planned turnover after surcharges) is used and this value is multiplied with the degree of completion / 100.</p>	FLOAT		Profitability_Tracked_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Planned Project Position	Project position amount, where documents of type project position be attached to a project)	FLOAT		ProjectPosition_Planned_Project	no
Remaining Cost Employee Estimated	The key figure is calculated from the employee estimates of the remaining time in the Time Tracker and the internal hourly rate	FLOAT	MONEY	RemainingCost_EmployeeEstimated_Project	yes
Remaining Time Employee Estimated	The basis of this key figure is tracking and recording entry (TimeTracker) and the estimate completion dialog. Here the remaining time and/or degree of completion of jobs are entered by the employee and, if necessary corrected by the project manager in the dialog "Estimate completion". When defining the time span, the estimates are used per day.	FLOAT	DURATION	RemainingTime_EmployeeEstimated_Project	yes
Start Tracked	Start time recording, first time recording for the project, whether time, receipts, driving, travel, etc.	DATE		Start_Tracked_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Supplier Budget	Sum of the budgets, which reference the order positions in the project. Budgets have no fixed date, but a margin, charge overlapping	FLOAT		SupplierBudget_Tracked_Project	yes
Supplier Turnover	Sum of the incoming invoice items, which reference the project and is included in the outgoing bills, Time Boundary: Invoice Date	FLOAT		SupplierTurnover_Tracked_Project	yes
Time Billed	Sum of the jobs, the boundary is based on date entries of the billed time entries	FLOAT	MONEY	Time_Billed_Project	yes
Chargeable Time	The basis of this key figure is tracking and recording entry (TimeTracker) and the evaluation of chargeable services. Here are the billable hours of individual jobs is charged at the project level. In defining the time span, the time entries per day are used.	FLOAT	DURATION	Time_Chargeable_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Time Performance Estimated Project	<p>Formula for calculation: (planned period (Total) * degree of completion) / Plan period (at the reporting date). The SPI (Schedule Performance Index) is the time-related performance key figure of earned value analysis. It is formed from the ratio of earned value and planned time/effort. This means that with an SPI greater than 1.00 (100%) the project results were delivered faster than originally planned, while a value of less than 1.00 (100%), the project is progressing too slowly. Calculation: the product of overall planned duration and degree of completion divided by the planned duration to the reporting period (to the project respectively)</p>	FLOAT		TimePerformance_Estimated_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Planned Time	The basis of this key figure is the project planning. Here, the planned time of the individual jobs are charged at the project level. When defining a time span, the planned time of the jobs under the assumption of uniform distribution are calculated on a daily basis.	FLOAT	DURATION	Time_Planned_Project	yes
Planned Time Active	The basis of this key figure is the project planning. Here, the planned time of the individual jobs are charged at the project level. When defining a time span, the planned time of the jobs under the assumption of uniform distribution are calculated on a daily basis.	FLOAT	DURATION	Time_PlannedActive_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Target Time	The basis of this key figure is the project planning. Here, the target time/effort of the individual jobs is calculated at the project level. When defining a time span, the target time/effort of the jobs under the assumption of uniform distribution are calculated on a daily basis.	FLOAT	DURATION	Time_Target_Project	yes
Time Purchased	Time from incoming invoices, time purchased ext. employee sum of hours from the incoming invoice positions, which is assigned a job. Boundary: Date of incoming invoice	FLOAT	DURATION	Time_Purchased_Project	yes
Actual Time Spent	The basis of this key figure is the tracking and recording entry (TimeTracker). Here, the recorded times of the employee of the job is summarized at the project level. When defining a time span, the recorded times per day are used.	FLOAT	DURATION	Time_Tracked_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Travel Cost Tracked	The basis of this key figure is the travel expense entry (travel). Here, the net amounts of travel expense entry for each project are summarized. In defining the scheduled cost per day are used. When defining a time span, the recorded costs per day are used.	FLOAT	MONEY	TravelCost_Tracked_Project	yes
Travel Cost Tracked Gros	The basis of this key figure is the travel expense entry (travel). Here are the gross amounts from the travel expense entry per project is summarized. When defining a time span, the recorded costs per day are used.	FLOAT	MONEY	TravelCostGros_Tracked_Project	yes
Turnover Chargeable	All billable times multiplied by external hourly rate, i.e. which job times can be billed on the invoices	FLOAT	MONEY	Turnover_Chargeable_Project	yes
Turnover External Chargeable	Calculating the costs based on the jobs of external employees in incoming invoice positions	FLOAT	MONEY	TurnoverExternal_Chargeable_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Turnover Planned	<p>The basis of this key figure is project planning and order administration. If the order value is stored (order confirmation or manually) the planned turnover = order value (net), if the order value is not set, but the offer value is then planned turnover = offer value (net), otherwise the project turnover (project + surcharges) is used.</p>	FLOAT	MONEY	Turnover_Planned_Project	yes
Invoice Value	<p>The basis of this key figure is the data of the invoice. Here, the net amount of the invoice amounts of the project with status "Invoice included" will be charged. If a time span is defined, the performance period is used, otherwise the invoice date is used.</p>	FLOAT	MONEY	Turnover_Tracked_Project	yes

Name	Description	Type	SubTyp	ID	Standard yes/no
Work Cost Tracked	<p>The basis of this key figure is the tracking and recording entry (TimeTracker) and the internal hourly rate of the employee. Here, the recorded time (actual time) is multiplied with the internal hourly rates of the employee of the job (if existence from the employee contract, otherwise from the master data of the employee). When defining a time span, the recorded time per day are used.</p>	FLOAT	MONEY	WorkCost_Tracked_Project	yes
Work Cost External Tracked	<p>Actual work effort external (for external staff). The costs are calculate based on the jobs in the incoming invoice positions</p>	FLOAT	MONEY	WorkCostExternal_Tracked_Project	yes
Planned Working Days Project	<p>These are the days between the planned start and planned end. Weekends are not counted, but public holidays are</p>	FLOAT		WorkingDays_Planned_Project	yes
Tracked Working Days Project	<p>These are the days between the first and the last time recording. Weekends are not counted, but public holidays are</p>	FLOAT		WorkingDays_Tracked_Project	yes

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