

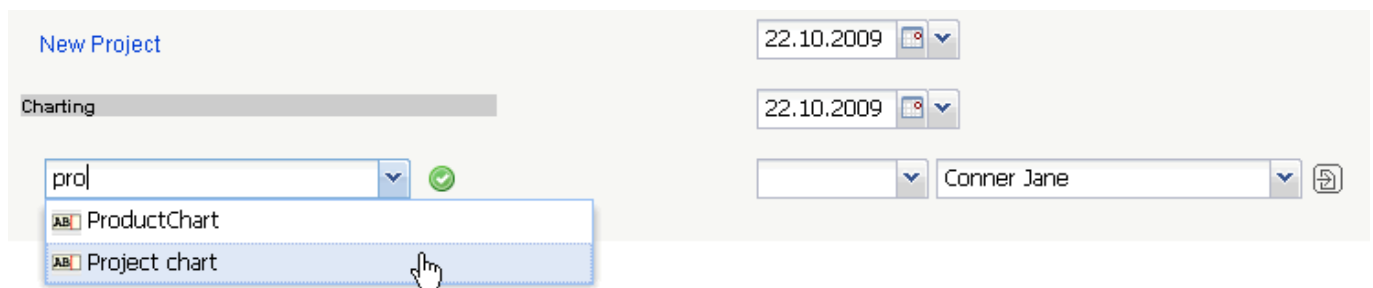
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4.12 Chart System

4.12.1 Applying Standard Charts

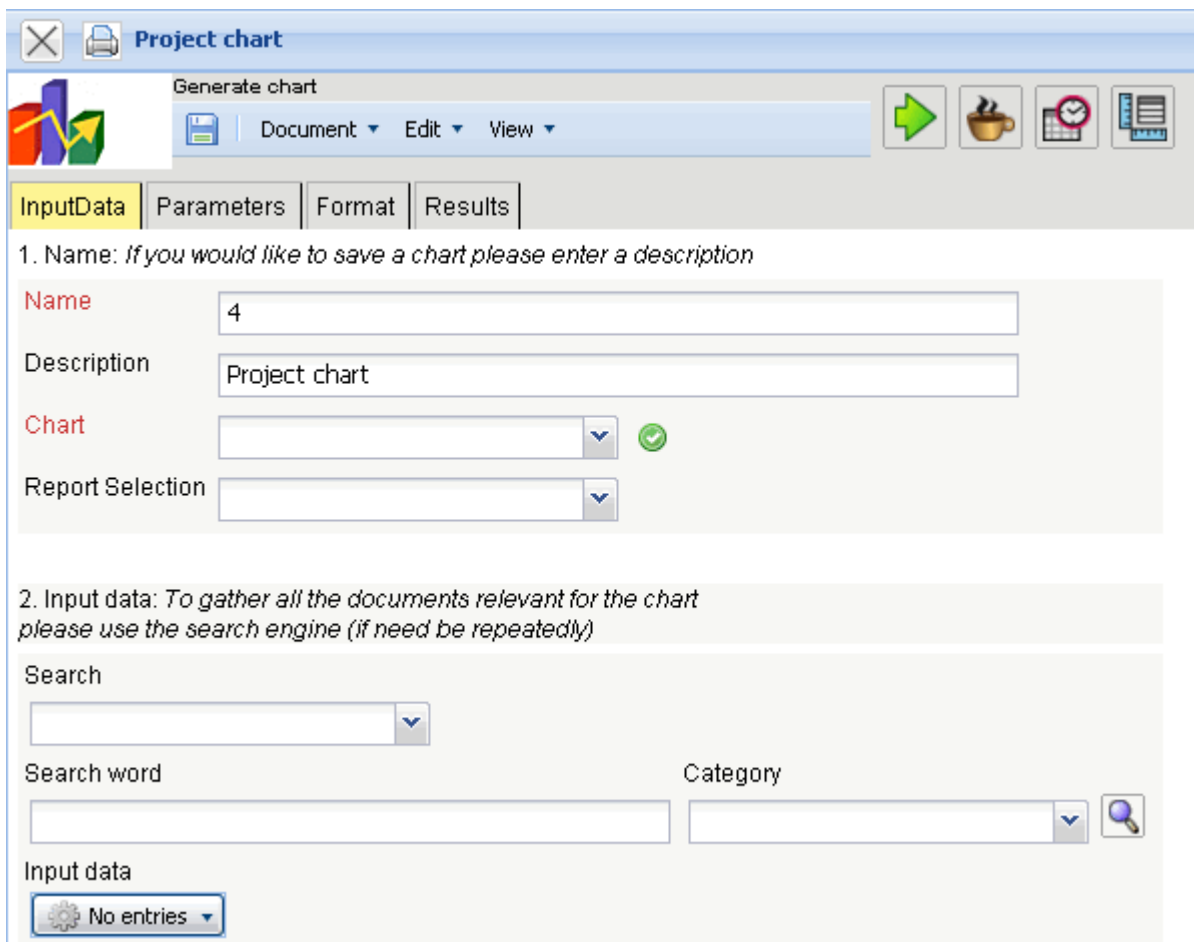
Projectile contains many standard charts. The charts are grouped by topic in the chart blocks and contain between one and up to 13 individual charts.

The charts can be opened in the work area by using the functionality “Charting”.



In the following example various project-related charts are displayed. Included are the charts: project overview chart, project structure diagram, target/actual comparison chart for projects and jobs, milestone-trend-analysis (MTA) chart, completion chart, employee occupation chart, skill-matrix, and perform report for resource planning chart.

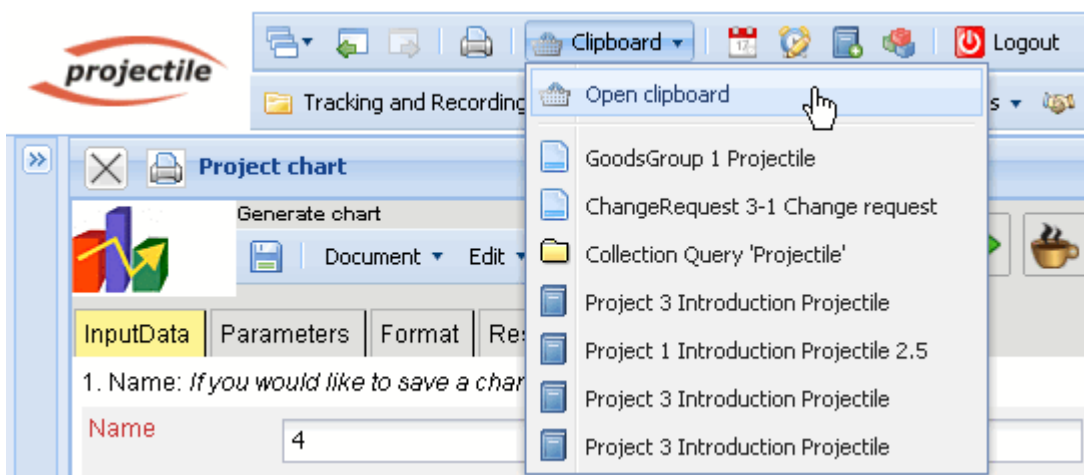
After opening the chart type (here, the project chart) a chart document is opened. In the document selection criteria and options for the chart can be configured.



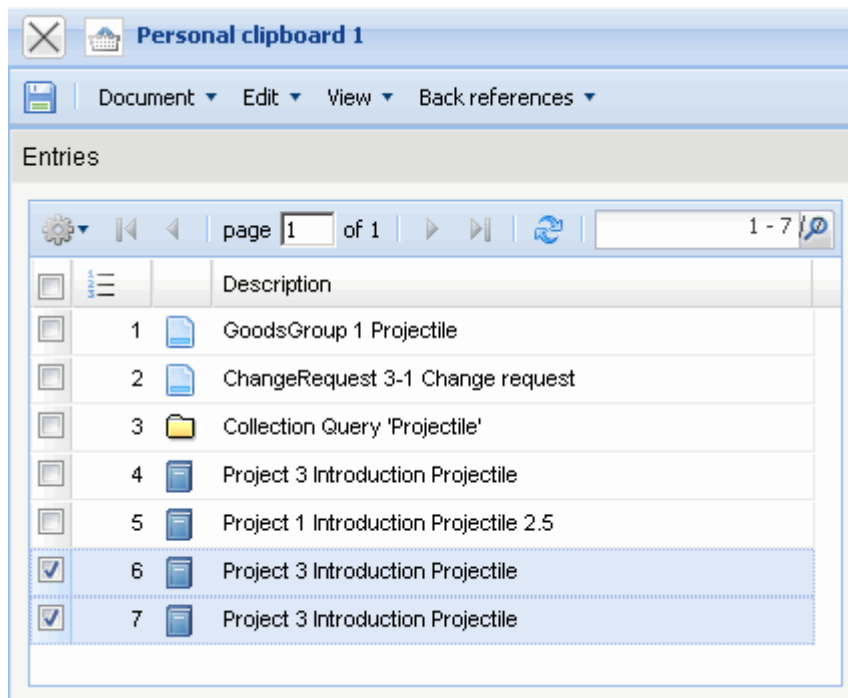
In the first part (1. Name) a name can be given for the chart if the chart is to be saved. Saving the chart is useful if the selection criteria of the chart remains constant, for example a list of all active projects for the current quarter. The saved chart can then be saved or copied to the personal clipboard or it can represent the basis for time service in order to automate the chart evaluations. Also, the charts can be generated in the background. To view the results of the chart, the evaluation must also be stored.

In the second part (2. Input Data) the input data of the chart is determined. In the third part (Main parameters) the input data can be limited through a time span.

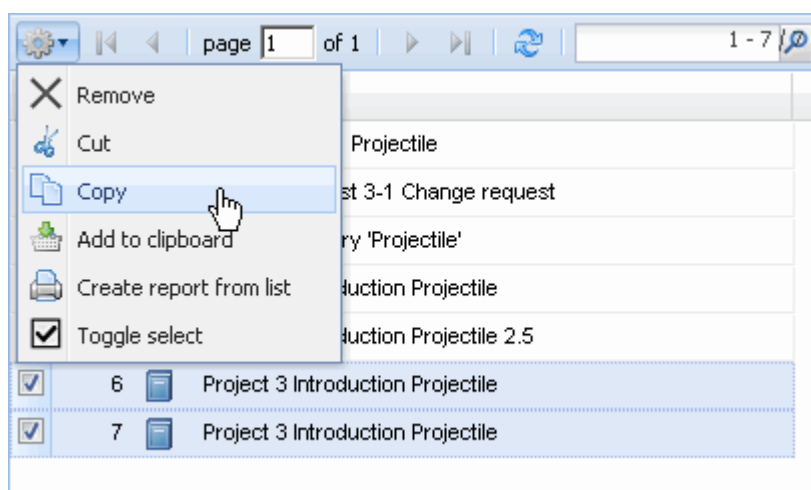
In the first example the selection criteria for the input data for two projects are selected from the personal clipboard:



These projects are marked in the clipboard, ...



... copied and ...



... pasted into the input 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

3. *Please select parameters:*

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

Input data

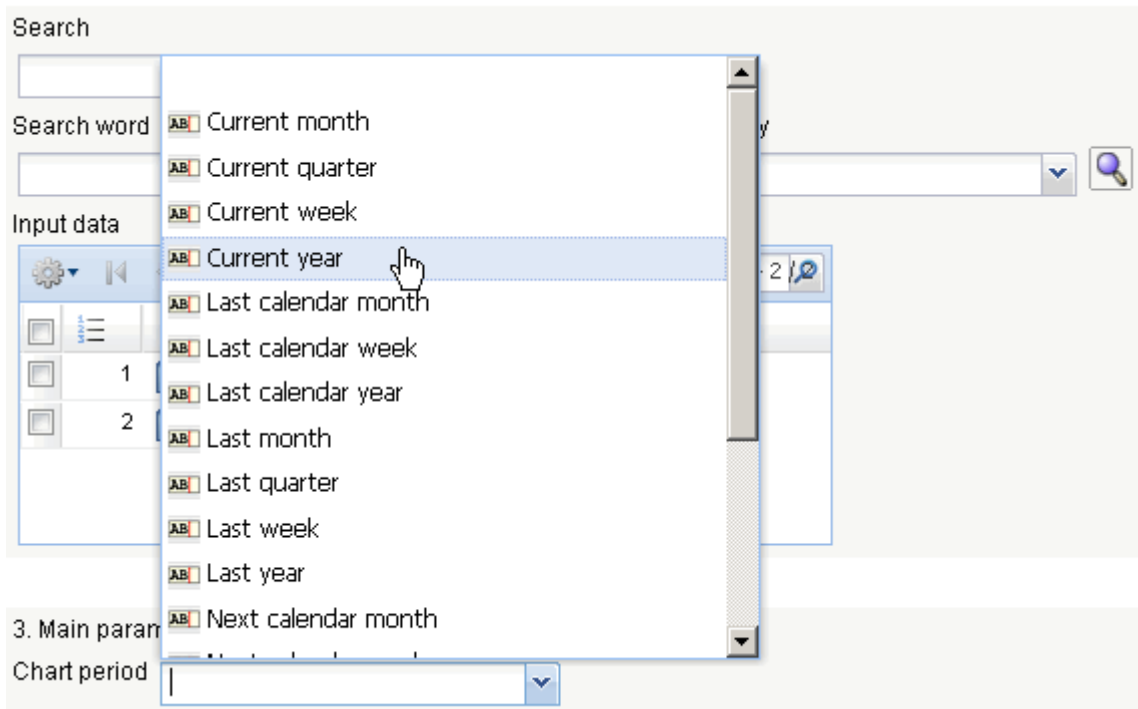
page 1 of 1

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☐	1	Project 3 Introduction Projectile

... Project 3 is the selected criteria, which is referred to in the chart.

Finally, the chart period is selected ...



... the time span limited to the current year ...

3. Main parameters: *Please select parameters:*

Chart period:

Start:

End:

... and the chart “job chart target/actual” generated using .

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:

Description:

Chart: 

Report Selection:

 Perform now

If the chart results are generated, the system presents the results in the browser. This chart includes information about the projects, activities and/or jobs and agents, the estimated and actual times with remaining time/effort and the corresponding difference (planned - actual), the estimated processing period (start / end) and the status information (status, completion date and completion of 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 chart block project chart is displayed again.


☐ Fileset

Job Target/Actual

Project	Job
3 Introduction Projectile	3-5 3.1-1 Concept - 3 Planning
3 Introduction Projectile	3-6 Customizing
3.1 Introduction Accounting	3.1-1 Introduction Projectile

If the chart block is saved, the chart block can be applied as the basis for time services or for chart evaluations in the background.



 Project chart



Generate chart
 Document Edit View

InputData Parameters Form

Save the document

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

Name

Description

Chart 

Report Selection

Using  the charts can be started in the background.

Project chart JB0001-BB Project chart

Generate chart

Document Edit View Back references

Perform in background

InputData Parameters Format Results

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

Name JB0001-BB

The system informs the user of the background process ...

Your action will be performed in background

[Hide these messages](#)

.. and generates ...

projectile

Clipboard Logout Create ... Search in docu

Tracking and Recording Offers Projects Invoices Contacts Human resources Admin

Project chart JB0001-BB Project chart

Generate chart

Document Edit View Back references

InputData Parameters Format Results

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

Name JB0001-BB

Description Project chart

Chart 03 - Project chart target/actual

Report Selection

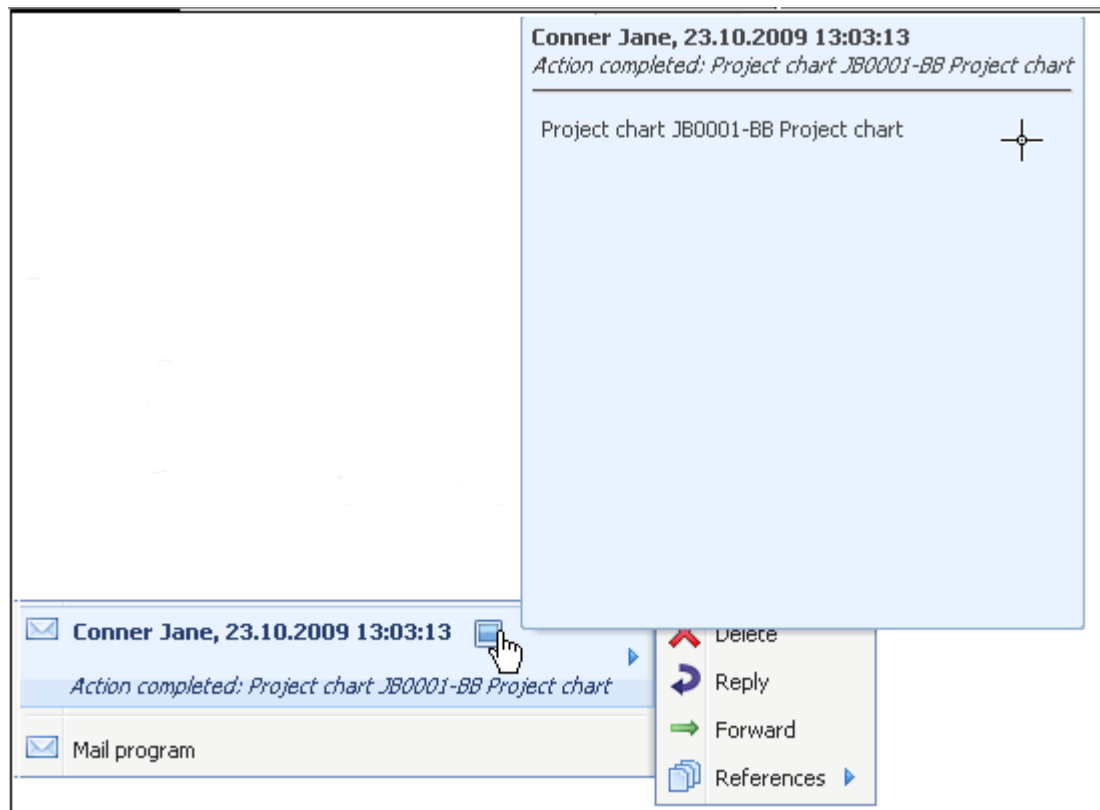
2. Input data: To gather all the documents relevant for the chart please use the search engine (if need be repeatedly)

Search

Search word Category

23.10.2009 (CW 43) Conner Jane 2 Messages

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



The message appears in the mailer and the user can access the chart results through a link:

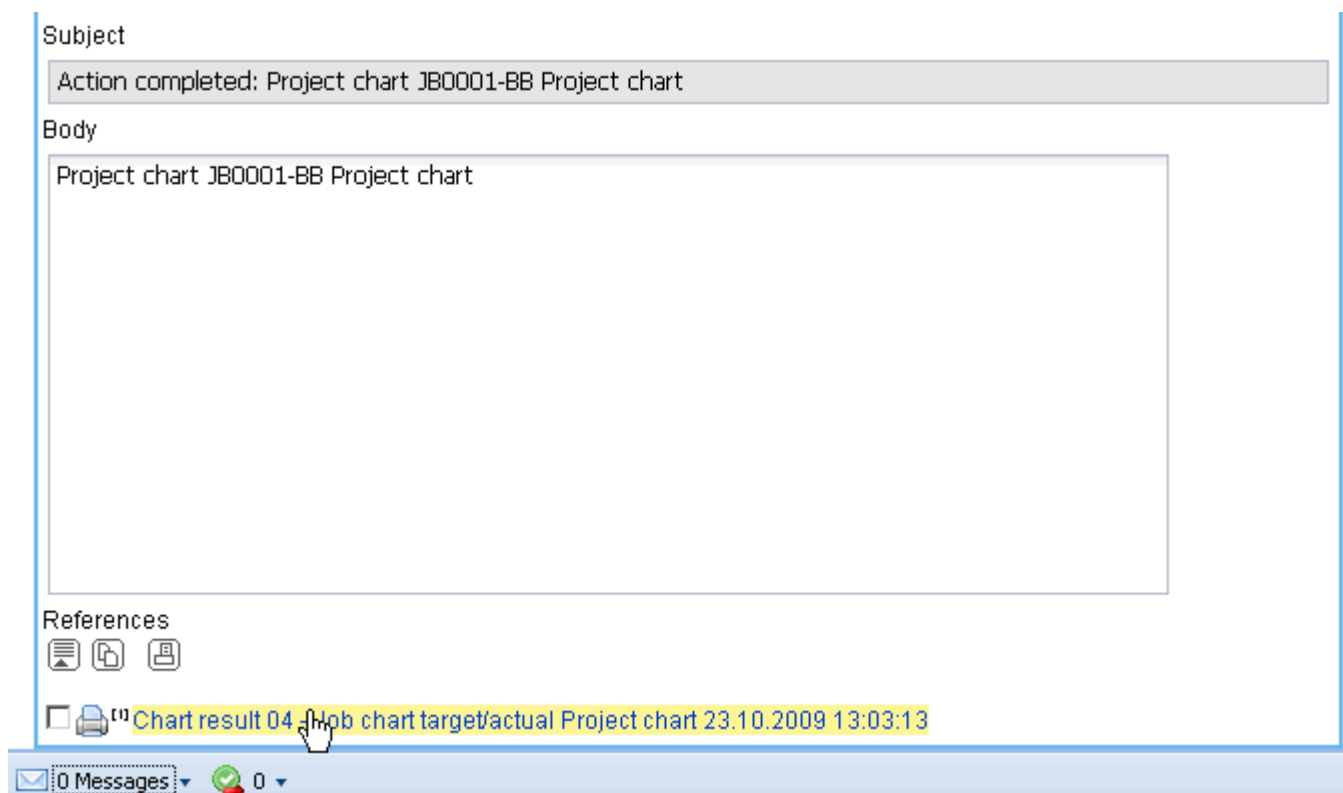


Chart result 04 - Job chart target/actual Project chart 23.10.2009 13:03:13

Chart: Project chart JB00001:BB Project chart
 CreatedAt: 23.10.2009 13:03:13
 ChartType: 04 - Job chart target/actual Project chart

Parameters:
 Comment:

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 CQ/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 AAAAAA	3 AAAAAA	137,50	125,17	12,33	100,72				

In the second example, the standard search engine is applied for selecting the input data. Here, for example, all projects (selected category), ...

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:

... which contain the term "Projectile" ...

Search

Search word: Projectile Category: Project

Input data

page 1 of 1 1 - 9

☐	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 applied as input data. Entries, which should not be applied as selection criteria are marked, toggle selected ...

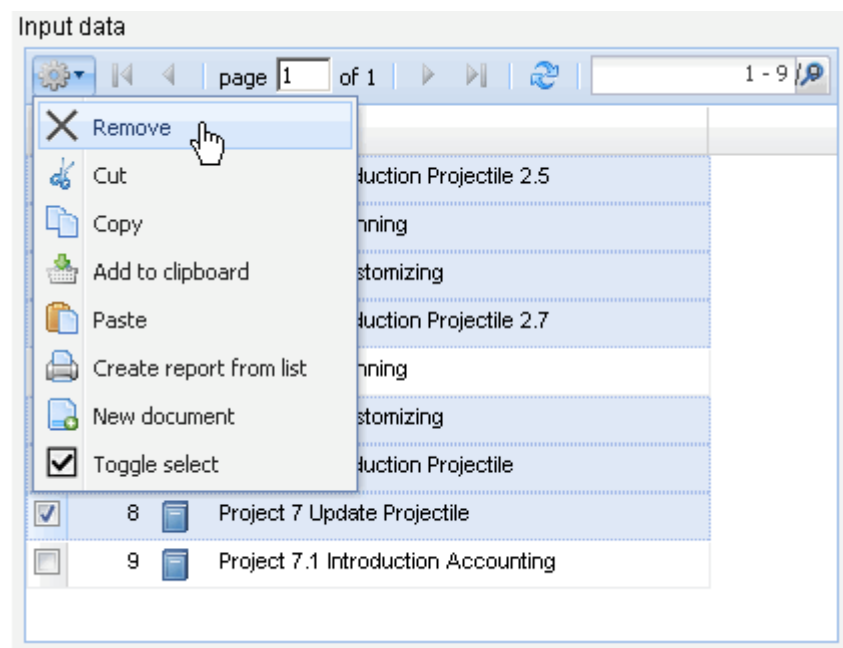
Input data

page 1 of 1 1 - 9

- Remove
- Cut
- Copy
- Add to clipboard
- Paste
- Create report from list
- New document
- ☒ Toggle select

☐	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

... and the entries are removed from the input data:



All entries from the selection are evaluated (not only the marked one)!

Project chart JB000001-BB Project chart

Generate chart

Document Edit View Back references

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

page 1 of 1

1	Project 2 Introduction Projectile 2.7
2	Project 3 Introduction Projectile

This process can be performed a several amount of times (with various categories). Afterwards, the chart is generated again (in the example, job target/actual comparison for the projects 2 and 3):

Fileset

?
×

Job Target/Actual

Project	Job	Employee	Planned [h]	Actual [h]	Difference [h]	Rest	Begin	End	Closed	State
2 Introduction Projectile 2.7	2-1 Introduction Projectile 2.7	Belsito Marina	0,00	0,00	0,00	0,00	14.09.2009	17.09.2009		PLANNED_LATE
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
			179,50	125,17	54,33	104,22				

The third possibility to select the input data is the advanced search. The appropriate search queries are stored here, which can be immediately applied.

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

Search

Top|

Top projects (active)

Category

Input data

No entries

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

Search

Top projects (active)

Search word

Category

Input data

page 1 of 1

1 - 1

1 Project 3 Introduction Projectile

Then, the chart period (3. main parameters) and the other criteria can be used (4. parameters) to usefully limit the chart results. These parameters include for example, the cost center of the project, the project type, project status, priority, and marked whether the project is an external order or not.

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

The further options refer to filtering the results.

Class	
	☐ AB ⁽¹⁾ 2 - Soll ☐ AB ⁽²⁾ 3 - Muss
Activity	
Priority	
Period	
External order / project	
	☐ AB ⁽¹⁾ 1
Take unit of employee	☐
ShowDocumentsWithoutTrackedTime	☒
Jobs in detail	☐
OneLinePerPeriod	☒
Only top projects	☐
IntersectionFilter	☒
ApplyFilterOnSubProjects	☐

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

Project chart JB000001-BB Project chart

Generate chart

Document ▾ Edit ▾ View ▾ Back references ▾

Perform now

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	
	☐ AB ⁽¹⁾ Development
Category	

... as well as marked as an “external order”.

Fileset										
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
			179,50	125,17	54,33	104,22				

On the “Format” tab (5. Adjustment of chart display) for example, the width of the image in pixel and the diagram type can be selected.

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 an alternative output format is needed (by default, all charts are generated in HTML within the application), the output format can be selected in the element “Display”.

In the following example, the chart job target/actual with the image (chart type “bar horizontal”) ...

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 800 px

Height 600 px

With image ☒

Display PDF

ChartType BAR_HORIZONTAL

Paper Size A4

Landscape Mode ☒

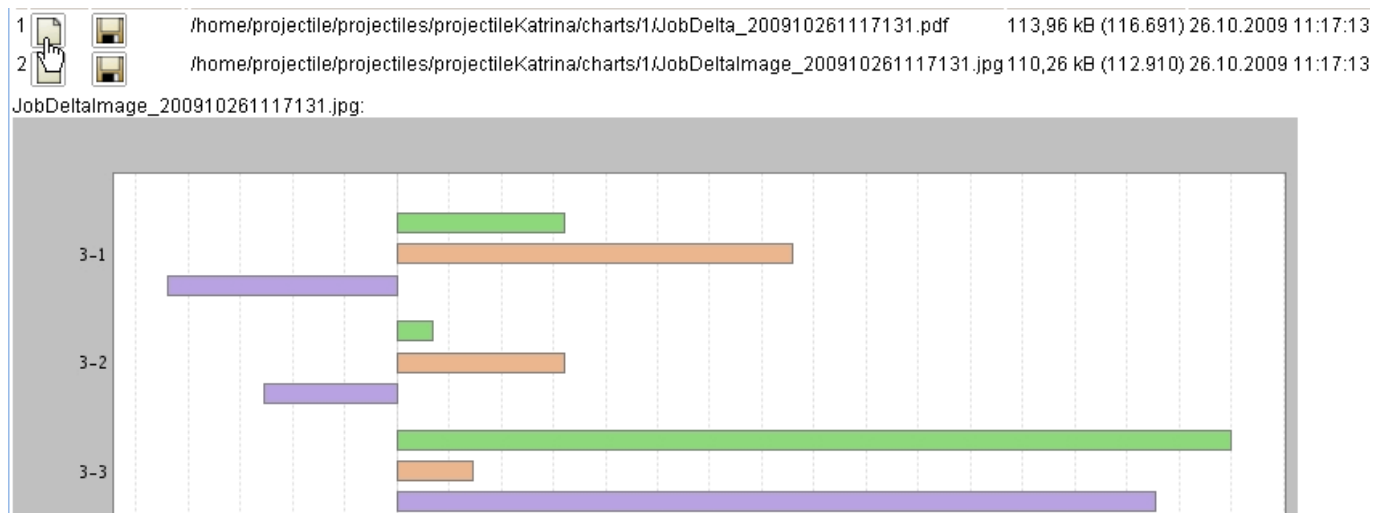
Perform now

... can be generated in pdf format.

Download		
#	Open	Save
File	Size	Last modified

Depending on the system settings, the generated chart in the browser ...

Je nach Systemeinstellung öffnet sich die erzeugte Auswertung im Browser ...

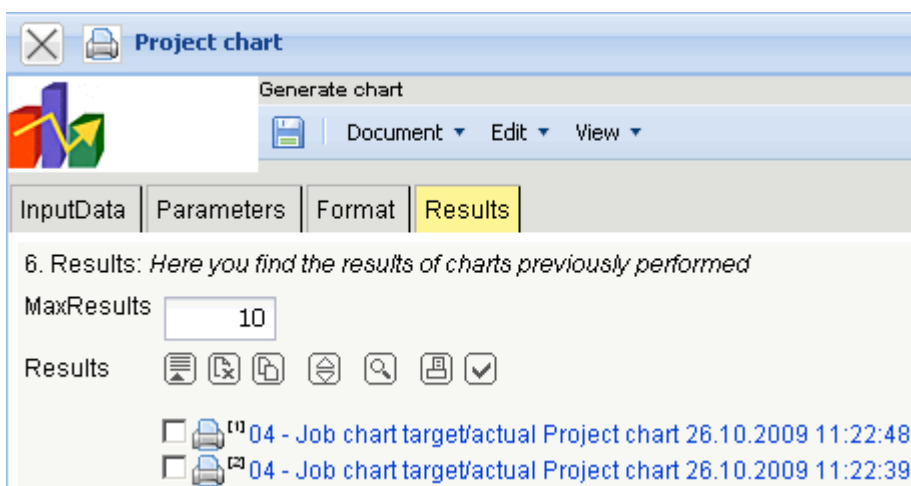


... oder im entsprechenden Anzeigeprogramm ...

Project	Job	Employee	Planned [h]	Actual [h]	Difference [h]	Rest	Begin	End	C losed	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

... (hier im Adobe Reader).

Im Reiter „Ergebnisse“ werden die Auswertungsergebnisse verwaltet.



Anmerkungen: Die Auswertungsergebnisse werden nur dauerhaft gespeichert, wenn der Auswertungsbereich abgespeichert ist. Die Anzahl der Ergebnisse kann im Feld „Max. Anzahl Ergebnisse“ eingestellt werden.

... Fortsetzung

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