# 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 be opened in the work area by using the functionality "Charting".

	New Project		22.10.2009 🔤 🕶
CH	arting		22.10.2009 💌 🗸
	prol	▼ ⊘	🗸 Conner Jane 🗸 🕀
	📧 ProductChart		
	📧 Project chart	elm)	

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.

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X A Project	t chart		
Gen	erate chart		
	Document 🔻 Edit 🔻 View 🔻		
InputData Para	meters Format Results		
1. Name: <i>If you w</i>	ould like to save a chart please enter a desc	ription	
Name	4		
Description	Project chart		
Chart	<ul> <li>Ø</li> </ul>		
Report Selection	×		
2. Input data: To g please use the se	ather all the documents relevant for the chai arch engine (if need be repeatedly)	rt	
Search			
	~		
Search word	(	Category	
			▼
Input data			
i No entries 🔻			

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 are 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:



🔀 🕋 Personal clipboard 1					
📙 🛛 Document 🔻 Edit 🔻 View 🔻 Back references 💌					
Entries					
🔅 📢 🖣 page 1 of 1 🕨 🕅 🍣 🚺 1-7 🔎					
Description					
1 GoodsGroup 1 Projectile					
ChangeRequest 3-1 Change request					
3 Collection Query 'Projectile'					
4      Project 3 Introduction Projectile					
5 F Project 1 Introduction Projectile 2.5					
6 Project 3 Introduction Projectile					
7 Project 3 Introduction Projectile					

... copied and ...

🔅 🖌 🕴 page 🚺 o	f 1   🕨 🕅   🥲   🛛 1 - 7 💯				
X Remove					
🤞 Cut	Projectile				
Copy du	st 3-1 Change request				
📥 Add to clipboard	ry 'Projectile'				
🚔 Create report from list	luction Projectile				
✓ Toggle select	luction Projectile 2.5				
🗹 6 📄 Project 3 Introduction Projectile					
7 Project 3 Introduction Projectile					

... pasted into the input data.

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Project chart					
Generate chart					
Document • Edit • View •					
InputData Parameters Format Results					
1. Name: If you would like to save a chart please enter a de	escription				
Name 4					
Description Project chart					
Chart 01 - Project overview chart 💉 🌾					
Report Selection					
<ol><li>Input data: To gather all the documents relevant for the operation of the search engine (if need be repeatedly)</li></ol>	hart				
Search					
×					
Search word	Category				
	✓ Q				
Input data					
No entries V					
Paste chy					
; 🛃 New document ase select parameters:					

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

l	nput data			
	<b>⇔</b> • 14	4	page 🚺 of 1 🗼 🕅 🛛 🍣 🗌	1 - 1 🔎
	1		Project 3 Introduction Projectile	

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

Finally, the chart period is selected ...

2025/06/30 04:42

Search			
Search word	Current month  Current quarter  Current week  Current year  Last calendar month  Last calendar week  Last calendar year  Last month  Last month  Last quarter  Last week		
3. Main paran Chart period	Next calendar month	•	

... the time span 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 chart target/actual" generated using  $\blacktriangleright$ .

🗙 🔒 Projec	t chart	
Gen 🗧	nerate chart	
	📄 🛛 Document 🔹 Edit 🔹 View 🔹 🔤	🔶 🗳 🛄
InputData Para	ameters Format Results	erform now
1. Name: <i>If you w</i>	vould like to save a chart please enter a description	
Name	4	
Description Project chart		
Chart	04 - Job chart target/actual 🛛 👻 📀	
Report Selection		

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).

Last	
update:	onbandhuchkanitel 4/4 12.1 hadianung dar standardauswartungan https://infederice.pat/deku.uk//infederice.pat/deku.uk/2/id-an/bandhuchkanitel 4/4 12.1 hadianung dar standardauswartungan Srav=1257152650
2019/10/25	
14:09	

#### 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.

X 🔒 Project	: chart
	Generate chart
	Document - Edit - View -
InputData Parar	meters Form Save the document
1. Name: <i>If you w</i> o	ould like to save a chart please enter a description
Name	JB0001-BB
Description	Project chart
Chart	04 - Job chart target/actual 🛛 👻 📀
Report Selection	▼

Using the charts can be started in the background.

X 🔒 Projec	t chart JB0001-BB Project chart	?
Generate	chart	
🚺 🗎 🛛	👔 🐴 👘 🛛 Document 🔹 Edit 🔹 View 🔹 Back references 🔹	🖻 🏀 😰 🛄
InputData Para	meters Format Results	Perform in background
1. Name: <i>If you w</i>	ould like to save a chart please enter a description	
Name	JB0001-BB	

The system informs the user of the background process  $\ldots$ 

Your action will be performed in background				
	Hide these messages			

.. and generates ...

-	projectile	🚍 🗸 🗔 🛯 🚔 🖓 Clipboard 🗸 🛛 📆 🤣 🔜 🥞 🚺 Logout 🔹 Create 🛛 🔽 🕞 Search in docu
	projectne	📄 Tracking and Recording 👻 📑 Offers 👻 📄 Projects 👻 📑 Invoices 👻 🍇 Contacts 👻 🚨 Human resources 🔹 🚞 Admi
>>	🗙 🔒 Proj	ect chart JB00001-BB Project chart ? 🗙
		rate chart           Image: Second state chart
	InputData Pa	rameters Format Results
	1. Name: <i>If you</i>	would like to save a chart please enter a description
	Name	JB00001-BB
	Description	Project chart
	Chart	03 - Project chart target/actual 👻 📀
	Report Selection	on v
	2. Input data: 7 please use the	o gather all the documents relevant for the chart search engine (if need be repeatedly)
	Search	▼
	Search word	Category
2	3.10.2009 (CW 43	) 🔹 🚨 Conner Jane 👻 🖆 2 Messages 🖿 🍳 0 👻 🍰 🖉 🖉 🕹 Search manual 💿 🛛 👰 🕇 🗍 🗍

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

	Conner Jane, 2 Action complete	2 <b>3.10.2009 13:0</b> 3 <i>d: Project chart JBC</i>	<b>::13</b> 1001-BB Project chart
	Project chart JE	30001-BB Project ch	nart
-			
🖂 Conner Jane, 23.10.2009 13:03:13 🖷		Velete	
Action completed: Project chart JB0001-BB Proj	iect chart 🖌 🖡	Reply	
Mail program	6	<ul> <li>Forward</li> <li>References</li> </ul>	

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

Subject						
Action completed: Project chart JB0001-BB Project chart						
Body						
Project chart JB0001-BB Project chart						
References           Image: Chart result 04 _Hob chart target/actual Project chart 23.10.2009 13:03:13						
10 Messages 🖡 🍳 0 🗸						

9/18

?

🗙 🔒 Chart result 04 - Job chart target/actual Project chart	23.10.2009 13:03:13
Eigeonis einer Auswertung	
🚺 🗐 🔉 🏝 🗇 🛛 Document 🔹 Edit 🔹 View 🔹 Back refe	erences •
Chart Project chart JB0001 <sub>5</sub> BB Project chart	
CreatedAt 23.10.2009	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 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
	3-14,4,4,4,4,4	34,4,4,4,4,4	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 catagory), ...

<ol><li>Input data: To gather all the documents re- please use the search engine (if need be replaced)</li></ol>	levant for the chart peatedly)	
Search		
Search word	Category	
Projectile	Project	<b>~</b>
Input data		Find

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

t late: 19/10/25 09	en:handbuo	ch:kapite	el_4:4.12.1_bedienung_der_standardauswertungen https://infodesire.net/d	okuwiki/doku.php?id=en:handbu	ch:kapitel_4:4.12.1_bedienun	g_der_standa
Searc	h					
			*			
Searc	h word	1		Category		
Proje	ctile			Project		✓ <a>€</a>
nput	lata					Find
: : :	1	4	page 🚺 of 1   🕨 🕅 😂	1 - 9 / 🔎		
	Ξ					
	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 ...

Ir	Input data						
	<b>₩</b>	4 4   page  1   o	f 1   🕨 🕅   🥲	1 - 9 🎾			
	$\times$	Remove					
	dó	Cut	luction Projectile 2.5				
	6	Сору	nning				
	*	Add to clipboard	stomizing				
		Paste	luction Projectile 2.7				
		Create report from list	nning				
		New document	stomizing				
ľ		Toggle select	luction Projectile				
ľ		8 📄 Project 7 Upda	ate Projectile				
	<b>V</b>	9 📄 Project 7.1 Intr	roduction Accounting				
-							

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

Input data	Input data						
🎲 🛛 🖣 🚽 page 🚺 o	f 1   🕨 🕅   🍣	1 - 9 🎾					
X Remove							
🖌 🖌 🗸	luction Projectile 2.5						
Сору	nning						
🐣 Add to clipboard	stomizing						
💼 Paste	luction Projectile 2.7						
🖨 Create report from list	nning						
🛛 🔒 New document	stomizing						
Toggle select	luction Projectile						
🔽 8 📄 Project 7 Upd	ate Projectile						
9 📄 Project 7.1 Int	roduction Accounting						

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

Project chart JB000001-BB Project chart	
Generate chart       Generate chart       Image: Second chart       Ima	�, ✤ 😰 🛄
InputData Parameters Format Results	Perform now
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	
<ol><li>Input data: To gather all the documents relevant for the chart please use the search engine (if need be repeatedly)</li></ol>	
Search	
×	
Search word Category	
Projectile Project 🗸	
Input data	
🔅 🔹 🕼 🖣 page 1 of 1 🕨 🕅 🧶 1 - 2 🔎	
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 ? X										
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			
Тор	~		
( 🔤 Top projects (active)	Ð	Category	✓ Q
Input data			

In the example, all top projects with the status "active" are transfered to the input data.

Search	
Top projects (active)	
Search word	Category
	▼
Input data	
🐡 🕅 🖣   page 🚺 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 char	't				
Generate chart					
📔 🗟 🎂 🗇 🛛 Document 🕶 B	Edit 🔹 View 🔹 Back references 🔹				
InputData Parameters Format Results					
4. Further criteria: <i>Please enter further criteria here</i> Cost center	and select one of the charts in menu on top (right)				
Category	Development				
Calegory	Engineering Gemeinkosten				
Produkt	Management Marketing				
Category Category Produkt Produkt Strategy Category Categ					
Benefit	Vertrieb				
Class	▼				

The further options refer to filtering the results.

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Class	
Activity	□ 프 <sup>111</sup> 2 - Soll □ 프 <sup>121</sup> 3 - Muss
Priority	
Period	
External order / project	
Take unit of employee	
ShowDocumentsWithoutTrackedTime	
OneLinePerPeriod Only top projects IntersectionFilter	

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 o	hart	
Generate chart		
🚺 📄 🙀 🎂 🗇 🛛 Document 🔻 Ed	it 🔻 View 🔻 Back references 💌	🏀 🔛 🛄
InputData Parameters Format Results		Perform now
4. Further criteria: Please enter further criteria he	ere and select one of the charts in menu	i on top (right)
Cost center	v	
	₽ 2 3 4 × 3 0	
	🗖 📧 🕫 Development	
Category	<ul> <li>▼</li> <li>↓</li> <li>↓</li></ul>	

... as well as marked as an "external order".

ApplyFilterOnSubProjects

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.

🗙 🔒 Project chart	JB000001-BB Project chart
Generate	chart
	👔 🎂 🍈 📔 Document 🔹 Edit 🔹 View 🔹 Back references 🕯
InputData Parameters	Format Results
5. Adjustment of chart di	splay: Please adjust here the dimension of the chart
Width	800 px
Height	600 px
With image	
Display	▼
ChartType	BAR_HORIZONTAL
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") ...

Last update: 2019/10/25 en:handbuch:kapitel_4:4.12.1_t 14:09	vedienung_der_standardauswertungen https://infodesire.ne	et/dokuwiki/doku.php?id=en:handbuch:kapitel_4:	4.12.1_bedienung_der_standardauswertungen&rev=1257162669
Project chart	JB000001-BB Project chart		? 🗙
Generate chart			
<b>**</b>	🕤 🛛 Document 🔹 Edit 🔹 View 🔹	Back references 🔻	
InputData Parameters	Format Results		Perform now
5. Adjustment of chart di	isplay: Please adjust here the dim	ension of the chart	
Width	800 px		
Height	600 px		
With image			
Display	PDF	~	
ChartType	BAR_HORIZONTAL	*	
Paper Size	A4	*	
Landscape Mode			

... can be generated in pdf format.

290	
File Size Last modified	

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



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

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### 📄 📋 🚑 + 🧔 🔅 1 / 1 😑 🖲 100% + 📑 🔂 Suchen +

#### Job Target/Actual

Project	Jop	Employe e	[h]	Actual [h]	Differen ce [h]	Kest	Begin	End	lo se d	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_PROCES
3 Introduction Projectile	3-2 Installation Projectile	Timothy Jones	3,50	16,13	-12,63	0,00	09.06.2009	30.10.2009		IN_PROCES
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_PROCES
3 Introduction Projectile	3-4 Project Management	Conner Jane	30,00	20,00	10,00	16,00	19.10.2009	30.10.2009		IN_PROCES
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	2 0. 1 0. 2 0 0 9	FINISHED
3 Introduction Projectile	3-6 Customizing	Conner Jane	20,00	16,50	3,50	3,50	02.10.2009	30.10.2009		IN_PROCES
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_PROCES _LATE

... (here in Adobe Reader).

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

🗙 🔒 Projec	chart
	Generate chart
	🔚 🛛 Document 🔻 Edit 🔻 View 🔻
InputData Para	neters Format <mark>Results</mark>
6. Results: Here	ou find the results of charts previously performed
MaxResults	10
Results 📳	& B 🗧 🔍 🗏 🗸
	<sup>10</sup> 04 - Job chart target/actual Project chart 26.10.2009 11:22:48
- L	

stored permanently only if the cahrt block is stored. The number of results can be set in the field "Max Number of Results".

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