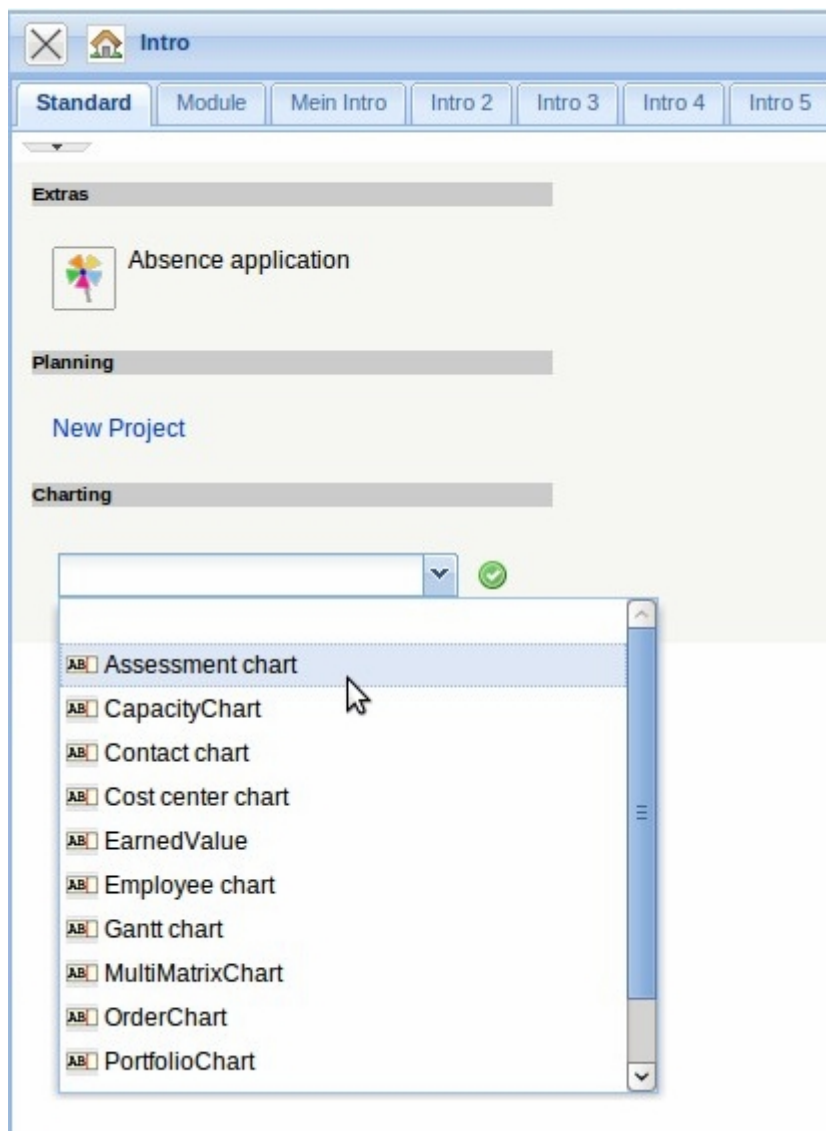


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4.12.4 Assessment Chart

The assessment chart generates financial charts in the system. These include, the cost evaluation (target/actual comparisons, budgets to costs and in-depth charts), the general charts, ([offers](#), budgets, invoices, expenses, costs and cash flow, profit contribution, including in-depth charts), overviews of billable and billed services, a list of open entries and the results evaluation.

The charts can be opened in the work area by using ...



... the functionality “Charting”.

The chart “cost evaluation” supplies a complete overview of the budgets and the actual internal costs as target/actual comparison. The budgets and costs are grouped by [cost types](#). The internal budgets specify the internal costs based on the plan data of the [jobs](#) and from the [budget administration](#). The internal costs are defined through time recording ([TimeTracker](#)) and [costing](#).

The chart “invoice evaluation” generates an overview of all invoice data and costing.

Invoice data: The offer values (external net/external total) and the internal offer value ([offer](#) is based on these internal costs), the internal and external budgets (from the [jobs](#) and the [budget administration](#)), the [invoice amounts](#) (external net/external total) and the internal invoice value (billable time), the [incoming payments](#) and the claim request are listed.

Cost data: The direct costs (travel costs, driving costs, receipt costs and external costs) and the external invoice, including outgoing payments and possibly, open liabilities are listed.

The chart “billable project times evaluation” generates an overview of all estimated, ordered, rendered, billable and already billed project services, based on the recorded and billed times and costs. These charts are based on the projects.

The “result evaluation” summarizes all internal costs and revenues, and calculates the project result. If no restriction regarding the projects is defined, the overhead costs are also considered and deducted accordingly. Determining the invoice values and actual costs is analogous to the assessment chart.

The chart “open entries evaluation” generates a list of all yet (-partially) open items. This list displays both the incoming payments as well as the outgoing payments, which are still open or partially open.

The chart “billable project times evaluation” generates a detailed overview of all recorded and billable times. The actual time/effort comes directly from the TimeTracker, the values for the billable times come from either the Time Tracker (if the option is active) or from the functionality “billable hours”. This version lists the project times project-based and displays individual time sheets with the comments in the lower part.

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