



The integrated total solution for service providers: projects, processes, knowledge.

Help, Part 9: Standard Reports

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9.1 Simple Standard Reports

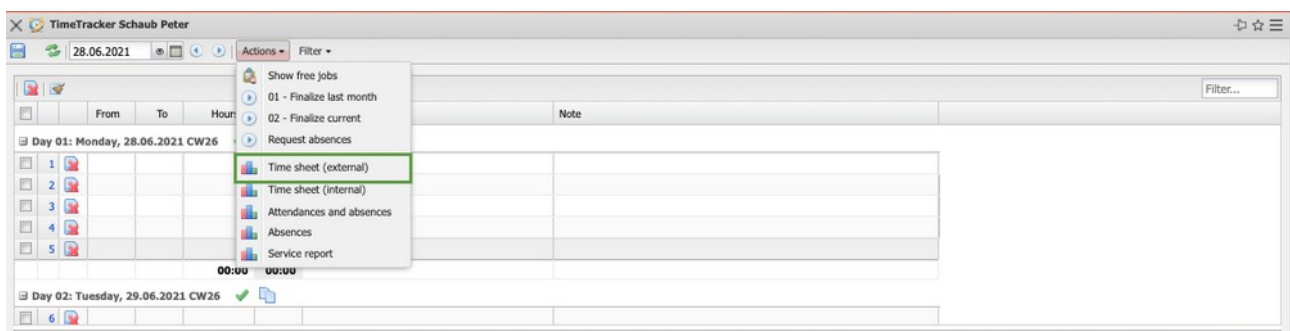
There are numerous standard reports in Projectile. The entire data stock is centrally available in the system's database and is prepared by Projectile for comprehensive project controlling according to defined selection criteria. The information is made available in the form of lists and graphics.

The following reports are available in Projectile: Gantt chart, work breakdown structure, earned value analysis, various plan/actual comparisons of project-related services and costs, activity reports for projects and customers and the presentation of the entire revenue and cost chain.

Many analyses can be called up directly from the TimeTracker, the project and the project planning.

9.1.1 Reports from TimeTracker

In the TimeTracker the reports are located in the actions. In the following example the logged in user wants to view his "time statements". After selecting the corresponding action ...



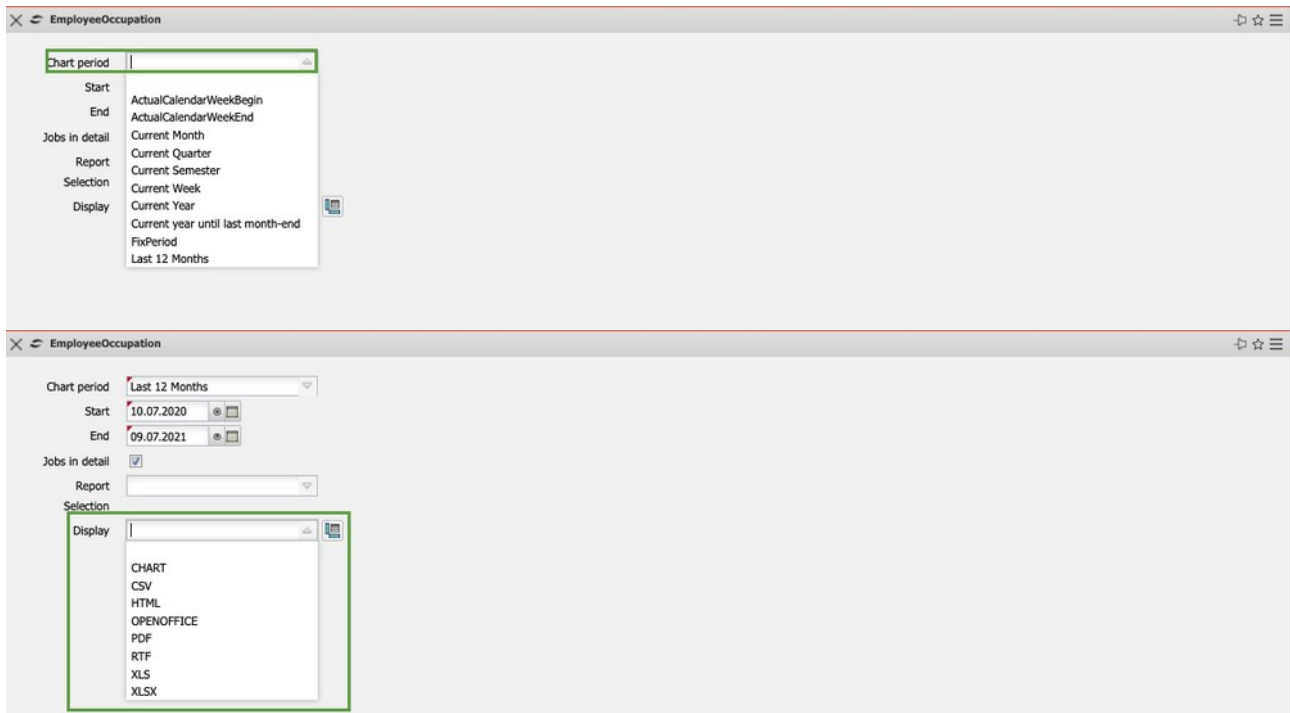
... an intermediate dialog opens. This intermediate dialog opens for almost all standard reports and allows, among other things, the entry of a report period and is often preset (in the TimeTracker usually the last calendar month, in the project usually the project period). The report period can be changed by the user.

In the drawing dialog a report compilation can often be selected. These are versions of a report with individual column or formatting definitions, which are stored by the administrator.

The output format for an export can also be selected in the intermediate dialog ("empty" means no export, display in the system). Possible output formats are CHART (simple graphics), CSV (mostly for interfaces or MS EXCEL), HTML, OPENOFFICE, PDF, RTF (for word processing), XLS and XLSX (MS EXCEL).

Some reports offer additional parameters in the intermediate dialog (like here "Work packages in detail").

After selecting the report period ...



...is confirmed with "Ok" and the system generates the report (here "time statements"):

EmployeeOccupation

| Description | Job | Employee | Occupation | Ist-Beginn | Ist-Ende | Actual [h] |
|-----------------|-------------------------------|--------------|-----------------------|------------|------------|------------|
| Einführung Fibu | 022.1-4 Aufgabe mit 2 Tickets | Schaub Peter | Beratung | 14.07.2020 | 26.08.2020 | 6,00 |
| Katalogprojekt | 031.1-1 Item A | Schaub Peter | Programmierung - Java | 26.08.2020 | 28.08.2020 | 6,50 |
| Einführung EPM | 047-1 Projektmanagement | Schaub Peter | Project Management | 10.07.2020 | 14.07.2020 | 10,00 |
| Einführung EPM | 047-1-1 Konzeption | Schaub Peter | Beratung | 21.07.2020 | 27.08.2020 | 8,50 |
| Test | 049-1 AP 1 | Schaub Peter | Interne Tätigkeit | 21.07.2020 | 09.10.2020 | 7,25 |
| Tickets | 067-1 Job mit Tickets | Schaub Peter | Interne Tätigkeit | 10.08.2020 | 13.08.2020 | 8,00 |
| Studie A | 068.1-3 a1 | Schaub Peter | Beratung - Junior | 31.07.2020 | 27.08.2020 | 23,00 |
| | | | | | | 69,25 |

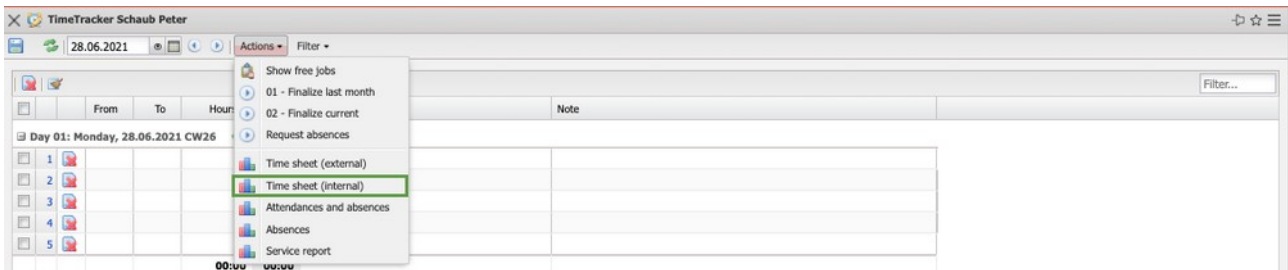
Einzelnachweise

| Date | Time | Project | Job | Occupation | Employee | TTComment |
|------------|------|--------------------|-------------------------------|-----------------------|--------------|---------------------|
| 10.07.2020 | 7,00 | 047 Einführung EPM | 047-1 Projektmanagement | Project Management | Schaub Peter | |
| 14.07.2020 | 3,00 | 022.1 Planung | 022.1-4 Aufgabe mit 2 Tickets | Beratung | Schaub Peter | |
| 21.07.2020 | 3,50 | 047 Einführung EPM | 047-1 Projektmanagement | Project Management | Schaub Peter | oipuzoiupituzietruo |
| 21.07.2020 | 4,25 | 049 Test | 049-1 AP 1 | Interne Tätigkeit | Schaub Peter | ilkzullterz |
| 31.07.2020 | 4,00 | 068.1 Phase 2 | 068.1-3 a1 | Beratung - Junior | Schaub Peter | dwtwet |
| 01.08.2020 | 4,00 | 047.1 Planung | 047.1-1 Konzeption | Beratung | Schaub Peter | Test 1 |
| 10.08.2020 | 4,00 | 067 Tickets | 067-1 Job mit Tickets | Interne Tätigkeit | Schaub Peter | |
| 13.08.2020 | 4,00 | 067 Tickets | 067-1 Job mit Tickets | Interne Tätigkeit | Schaub Peter | |
| 24.08.2020 | 6,00 | 068.1 Phase 2 | 068.1-3 a1 | Beratung - Junior | Schaub Peter | ghtzertztrzer |
| 25.08.2020 | 2,00 | 049 Test | 049-1 AP 1 | Interne Tätigkeit | Schaub Peter | |
| 25.08.2020 | 5,00 | 068.1 Phase 2 | 068.1-3 a1 | Beratung - Junior | Schaub Peter | adgfesadgaes |
| 26.08.2020 | 3,00 | 022.1 Planung | 022.1-4 Aufgabe mit 2 Tickets | Beratung | Schaub Peter | dgsgg |
| 26.08.2020 | 1,00 | 031.1 Dach | 031.1-1 Item A | Programmierung - Java | Schaub Peter | |
| 26.08.2020 | 4,00 | 068.1 Phase 2 | 068.1-3 a1 | Beratung - Junior | Schaub Peter | sgdß |

The "Time statements" report generates an overview of an employee's totals

and individual time statements. This overview is based on the recording in the TimeTracker for the employee's work packages. The report is often used for internal statements or as an external statement as an attachment to an invoice.

In the next example the logged in user wants to view his "timesheet". After selecting the appropriate action ...



... an intermediate dialog opens.



After entering the report period, the system then generates the "timesheet". This report provides an overview of the project activities and working times of employees in the selected time interval. The project activities are based on the data sheet entered in the TimeTracker and the working time data is either entered in the TimeTracker as "come-to-work" or can be automatically determined by the system as the sum of the project times with the help of an option (as in the example here). The absences (vacation, special leave, illness, ...) can be entered decentrally in the TimeTracker or centrally in the function "Absence recording" (see section 7.1 and 7.2).

In addition, the data of the working time management (vacation and flextime account) are listed here. Optionally, the postings from the working time accounts and a list of the booked work packages can also be displayed.

Fileset

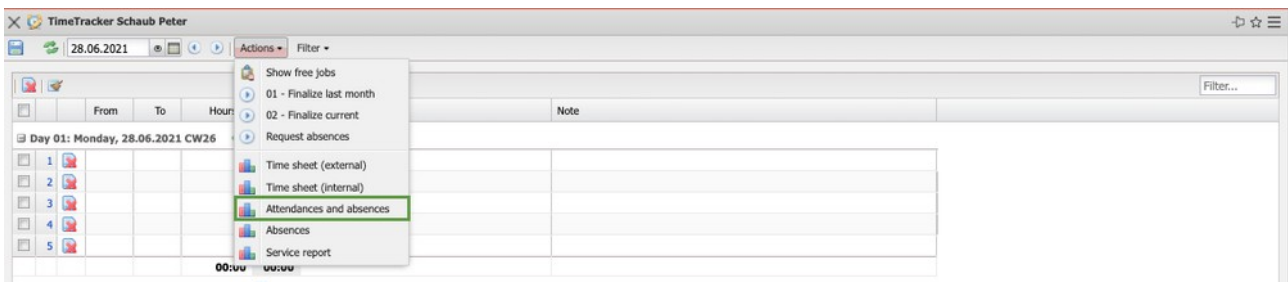
PDF XLS

Time sheet

Schaub, Peter Personnel Number = 003

| Date | Weekday | Times | Eintrag | Sollzeit | Istzeit | Differenz | Externe Bemerkung | Interne Bemerkung |
|------------|---------|-------------|-----------------------------|----------|---------|-----------|-------------------|----------------------|
| Total | Total | Total | Total | Total | Total | Total | Total | Total |
| 10.07.2020 | Fri | 08:00-15:00 | 047 - Projektmanagement | 6,00 | 7,00 | 1,00 | | |
| 11.07.2020 | Sat | | | 0,00 | 0,00 | 0,00 | | |
| 12.07.2020 | Sun | | | 0,00 | 0,00 | 0,00 | | |
| 13.07.2020 | Mon | | | 8,00 | 0,00 | -8,00 | | |
| 14.07.2020 | Tue | 08:00-11:00 | 022 - Aufgabe mit 2 Tickets | | 3,00 | | | |
| | | 11:00-14:00 | 047 - Projektmanagement | | 3,00 | | | |
| | | | | 8,00 | 6,00 | -2,00 | | |
| 15.07.2020 | Wed | | | 8,00 | 0,00 | -8,00 | | |
| 16.07.2020 | Thu | | | 8,00 | 0,00 | -8,00 | | |
| 17.07.2020 | Fri | | | 6,00 | 0,00 | -6,00 | | |
| 18.07.2020 | Sat | | | 0,00 | 0,00 | 0,00 | | |
| 19.07.2020 | Sun | | | 0,00 | 0,00 | 0,00 | | |
| 20.07.2020 | Mon | | | 8,00 | 0,00 | -8,00 | | |
| 21.07.2020 | Tue | 08:00-11:30 | 047 - Konzeption | | 3,50 | | | oipuzoiupituziuetzuo |
| | | 11:30-15:45 | 049 - AP 1 | | 4,25 | | | tikzulterz |
| | | | | 8,00 | 7,75 | -0,25 | | |
| 22.07.2020 | Wed | | | 8,00 | 0,00 | -8,00 | | |
| 23.07.2020 | Thu | | | 8,00 | 0,00 | -8,00 | | |
| 24.07.2020 | Fri | | | 6,00 | 0,00 | -6,00 | | |
| 25.07.2020 | Sat | | | 0,00 | 0,00 | 0,00 | | |
| 26.07.2020 | Sun | | | 0,00 | 0,00 | 0,00 | | |
| 27.07.2020 | Mon | | | 8,00 | 0,00 | -8,00 | | |
| 28.07.2020 | Tue | | | 8,00 | 0,00 | -8,00 | | |

In the next example, the logged-in user would like to view a "presence/absence overview". After selecting the appropriate action ...



... and the confirmation of the intermediate dialog the report is generated. This list shows the pure working time information (without project reference) for each day of the report period. This report corresponds to the "timesheet" structure, but without the information of the individual bookings on projects.

Fileset

PDF XLS

Working Time Chart

| Date | Day | Status | Begin | End | Hours | Pausen | Netto-Stunden | Soll-Stunden | +/- Tag | +/- Monat |
|------------|-----|--------|-------|-----|-------|--------|---------------|--------------|---------|-----------|
| 01.07.2021 | Thu | Away | | | | | 0,00 | 8,00 | -8,00 | -8,00 |
| 02.07.2021 | Fri | Away | | | | | 0,00 | 6,00 | -6,00 | -14,00 |
| 03.07.2021 | Sat | Free | | | | | 0,00 | 0,00 | | |
| 04.07.2021 | Sun | Free | | | | | 0,00 | 0,00 | | |
| 05.07.2021 | Mon | Away | | | | | 0,00 | 8,00 | -8,00 | -22,00 |
| 06.07.2021 | Tue | Away | | | | | 0,00 | 8,00 | -8,00 | -30,00 |
| 07.07.2021 | Wed | Away | | | | | 0,00 | 8,00 | -8,00 | -38,00 |
| 08.07.2021 | Thu | Away | | | | | 0,00 | 8,00 | -8,00 | -46,00 |
| 09.07.2021 | Fri | Away | | | | | 0,00 | 6,00 | -6,00 | -52,00 |
| 10.07.2021 | Sat | Free | | | | | 0,00 | 0,00 | | |
| 11.07.2021 | Sun | Free | | | | | 0,00 | 0,00 | | |
| 12.07.2021 | Mon | Away | | | | | 0,00 | 8,00 | -8,00 | -60,00 |
| 13.07.2021 | Tue | Away | | | | | 0,00 | 8,00 | -8,00 | -68,00 |
| 14.07.2021 | Wed | Away | | | | | 0,00 | 8,00 | -8,00 | -76,00 |
| 15.07.2021 | Thu | Away | | | | | 0,00 | 8,00 | -8,00 | -84,00 |
| 16.07.2021 | Fri | Away | | | | | 0,00 | 6,00 | -6,00 | -90,00 |
| 17.07.2021 | Sat | Free | | | | | 0,00 | 0,00 | | |
| 18.07.2021 | Sun | Free | | | | | 0,00 | 0,00 | | |
| 19.07.2021 | Mon | Away | | | | | 0,00 | 8,00 | -8,00 | -98,00 |
| 20.07.2021 | Tue | Away | | | | | 0,00 | 8,00 | -8,00 | -106,00 |
| 21.07.2021 | Wed | Away | | | | | 0,00 | 8,00 | -8,00 | -114,00 |
| 22.07.2021 | Thu | Away | | | | | 0,00 | 8,00 | -8,00 | -122,00 |
| 23.07.2021 | Fri | Away | | | | | 0,00 | 6,00 | -6,00 | -128,00 |
| 24.07.2021 | Sat | Free | | | | | 0,00 | 0,00 | | |
| 25.07.2021 | Sun | Free | | | | | 0,00 | 0,00 | | |

9.1.2 Reports from Project

Also in the project there are some reports in the actions. In the following example, the logged-in user wants to view a plan/actual comparison for work packages in "his" project. After selecting the corresponding action ...

Project 047.2 Customizing

Document - Edit - View - Back references - Actions -

General data Stakeholders Proposal Portfolio Risk assessment Status Key figures Planning Planning documents Order data Logbook Final Report Misc

Basic information

Number: 047.2 Status: Status

Description: Customizing

Contents description

Start of planning: 26.02.2020 End of planning: End of planning

Note

Structure

Main project: 047 Einführung EPM Parent: 047 Einführung EPM project

Subordinate projects

Actions menu:

- Administration
- Offers / Billing
- Hourly rates
- Charts
 - Execute value analyse
 - Gantt chart
 - Plan/actual comparison (Job)
 - Plan/actual comparison (process)
 - Plan/actual comparison (project)
 - Project overview
 - Recording back list
 - Time sheet (external)
- Create directories
- Set project activity

Project managers: target time Planning time Actual time Exter LastStateEstimate EnterNewState

00:00 00:00 00:00

... an intermediate dialog opens.

JobDelta

Time frame

Start: 26.02.2020

End: 06.03.2020

Display

Report Selection

Perform now Perform in background

In the intermediate dialog, the report period for which the project period is

preset is displayed and can be changed by the user.

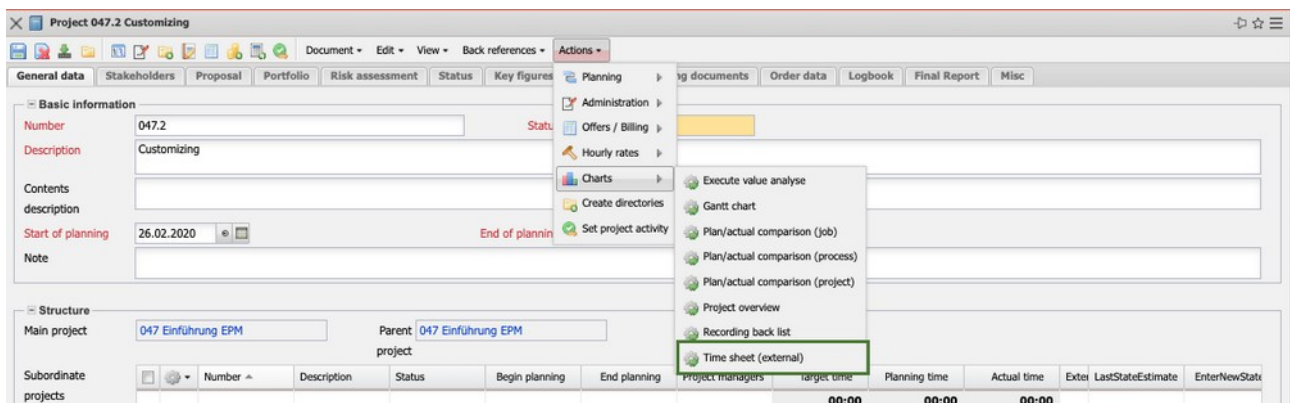
The "Plan/actual work packages" report provides an overview of the work done for the individual work packages in the selected projects (in the example, only one project). The planned and actual times for the work packages are displayed as a diagram and in the form of a list. The planned data is determined from the work packages and the actual times are obtained from the TimeTracker's entry data. The report also contains information about the planned start and end of the tasks, about the status (incl. completion date) of the work packages.

| Process | Project | Employees | Occupation | Actual [h] | Ist-Beginn | Ist-Ende |
|------------------------|-------------------|--------------------------------|----------------|------------|------------|----------|
| 047.2-1 Konfiguration | 047.2 Customizing | 1: Möller Marjan | Support | | | |
| 047.2-2 Programmierung | 047.2 Customizing | 1: Zöllner Pia 2: Dohle Hannah | Programmierung | | | |
| 047.2-3 Testen | 047.2 Customizing | 1: *Support | Support | | | |
| 047.2-4 Dokumentation | 047.2 Customizing | 1: *Support | Dokumentation | | | |

Einzelnachweise
No data found

In the next example, the logged-in user wants to view time statements of "his" project. In the TimeTracker, the employee can view "his" times in the report, i.e. all entries that this user has made in the TimeTracker. From the project the system creates an report with the times of all employees on the project.

After selecting the appropriate action ...



... and confirmation of the intermediate dialog the report is generated.

Fileset

PDF XLS

EmployeeOccupation

| Process | Project | Employees | Occupation | Actual [h] | Ist-Beginn | Ist-Ende |
|------------------------|-------------------|--------------------------------|----------------|------------|------------|----------|
| 047.2-1 Konfiguration | 047.2 Customizing | 1: Möller Marjan | Support | | | |
| 047.2-2 Programmierung | 047.2 Customizing | 1: Zöllner Pia 2: Dohle Hannah | Programmierung | | | |
| 047.2-3 Testen | 047.2 Customizing | 1: *Support | Support | | | |
| 047.2-4 Dokumentation | 047.2 Customizing | 1: *Support | Dokumentation | | | |

Einzelnachweise
No data found

The report "Gantt chart" shows a bar chart. This is a diagram for visualizing the time planning of a project. The duration of a work package or project is symbolised by the length of the bar in the time axis. The bars can include both actual and plan data. Events or milestones are represented as points in time. Projectile visualizes processes in the project report.

Project 047.2 Customizing

Document • Edit • View • Back references • Actions •

General data Stakeholders Proposal Portfolio Risk assessment Status Key figures

Basic information

Number: 047.2 Status: Statu

Description: Customizing

Contents description

Start of planning: 26.02.2020 End of planning: End of plannin

Note

Structure

Main project: 047 Einführung EPM Parent: 047 Einführung EPM project

Subordinate projects

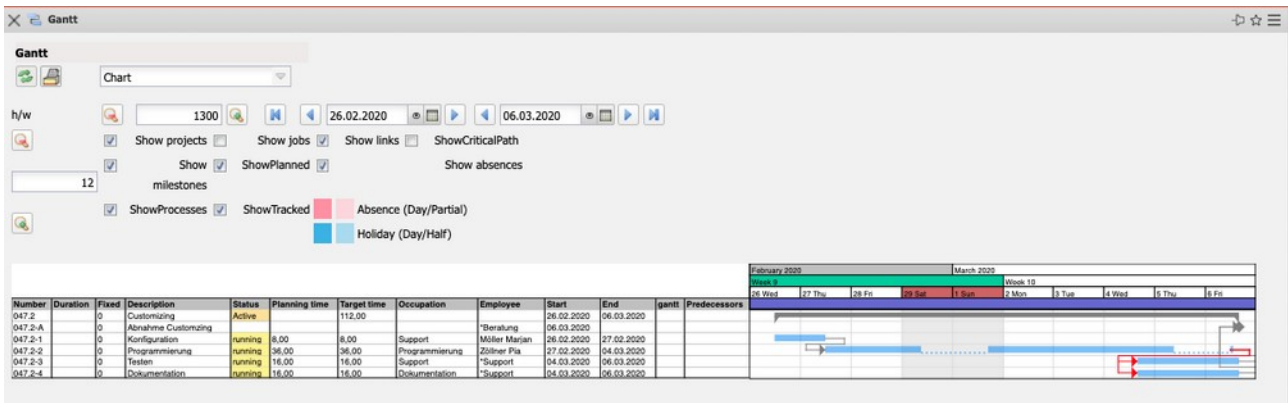
Actions menu:

- Planning
- Administration
- Offers / Billing
- Hourly rates
- Charts
 - Execute value analyse
 - Gantt chart**
 - Plan/actual comparison (job)
 - Plan/actual comparison (process)
 - Plan/actual comparison (project)
 - Project overview
 - Recording back list
 - Time sheet (external)
- Create directories
- Set project activity

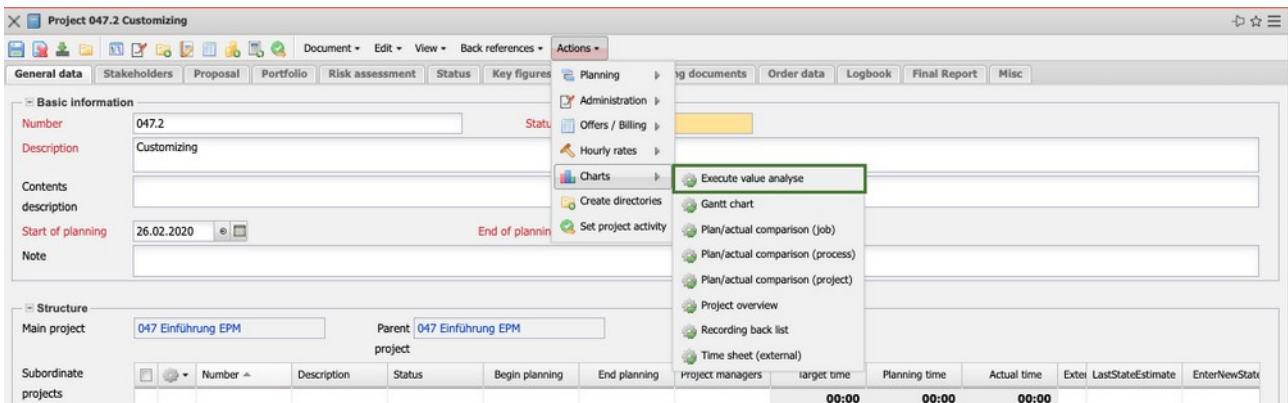
Project manager: target time: 00:00 Planning time: 00:00 Actual time: 00:00 Exter: LastStateEstimate EnterNewStat

As parameters for the generated reports, various display types and the size of the graphic report are available for selection. For the display types, you can select whether bars are to be generated over projects and work packages, whether milestones and networks are to be displayed and whether the date specification for the significant data is to be generated.

In the Gantt chart, the planning data for the main project and sub-projects are displayed as gray bars with phases, the milestones as gray diamonds and the work packages as blue bars. The arrows between the work packages symbolize the flow relationships.



Earned Value Analysis is an effective management tool for project controlling and describes a method to make the progress of a project measurable and predictable at any time.



The Earned Value Analysis is based on the three basic key figures BCWS (cumulative plan as of the key date), ACWP (cumulative actual as of the key date) and BCWP (actual plan - cumulative planned costs of the activities completed up to this point in time) which can be determined at each project date.

The special feature of Earned Value Analysis is that the BCWP is used as the third parameter for project report, in addition to the planned and actual values. This third parameter makes it possible to measure the progress of the project.

The report first displays the key figures from Earned Value Analysis in tabular form. The administrator can select the time period as the column for the plan, actual (and remaining), progress (percentage of completion in the current period minus the percentage of completion in the last period), earned value, and key figures and variances. The periods available here are "weekly", "monthly" and "quarterly". The setting in Grouping determines the line layout: by employee, by activity and by sub-project. Four options can be selected to deter-

mine the progress. The option from plan values determines for the grouping characteristic (see next element) the arithmetical degree of completion (actual expenses/planned expenses), the option from estimates in project uses the degree of completion from the project and the option from estimates in time recording uses the estimates from the time trackers. The data in the table can be calculated in hours, person days or EUR.

Usually the options Unit="hours", Grouping="by sub-projects", Period="weekly" and Progress Calculation="Estimate from Time Tracker" are set.

Earned Value
generated by Schaub Peter, 09.07.2021 12:47:34
 26.02.2020 - 06.03.2020

| Planned [h] | Part | Total | 9/20 | 10/20 |
|-------------------|--------|-------------|-------|--------|
| 047.2 Customizing | 100,00 | 112,00 | 22,40 | 89,60 |
| Sum | 100,00 | 112,00 | 22,40 | 89,60 |
| | | accumulated | 22,40 | 112,00 |

| Tracked [h] | Deviation from plan | Sum | 9/20 | 10/20 |
|-------------------|---------------------|-------------|------|-------|
| 047.2 Customizing | -112,00 | 0,00 | 0,00 | 0,00 |
| Sum | -112,00 | 0,00 | 0,00 | 0,00 |
| | | accumulated | 0,00 | 0,00 |

| Progress [%] | State | planned | 9/20 | 10/20 |
|-------------------|---------|---------|------|-------|
| 047.2 Customizing | planned | 0,00 | 0,00 | 0,00 |

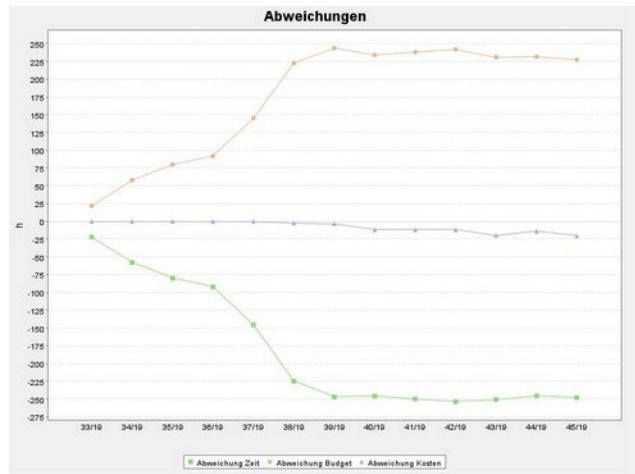
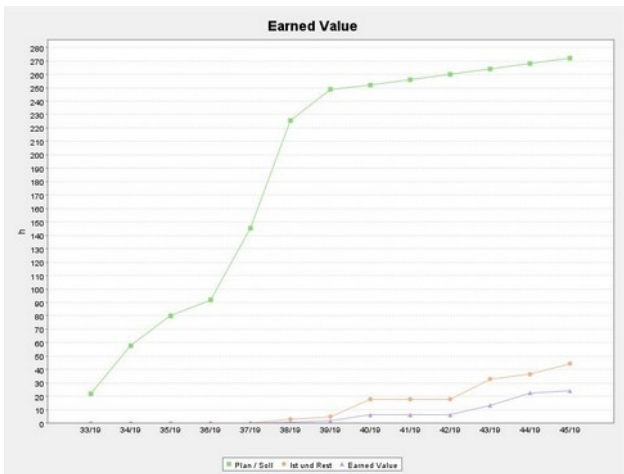
| EarnedValue [h] | State | planned | 9/20 | 10/20 |
|-------------------|--------------------|-------------|------|-------|
| 047.2 Customizing | planned | 0,00 | 0,00 | 0,00 |
| Sum | in progress < Plan | 0,00 | 0,00 | 0,00 |
| | | accumulated | 0,00 | 0,00 |

| Figures [h] | 9/20 | 10/20 |
|--------------|------------|--------|
| Planned | BCWS 22,40 | 112,00 |
| Tracked | ACWP 0,00 | 0,00 |
| Earned Value | BCWP 0,00 | 0,00 |

| Differences [h] | BCWP - BCWS | -22,40 | -112,00 |
|-------------------|-------------|--------|---------|
| Difference Time | BCWS - ACWP | 22,40 | 112,00 |
| Difference Budget | BCWP - ACWP | 0,00 | 0,00 |
| Difference Cost | | | |

This report consists of a table and two figures. In the first block the table shows the planned effort per subproject (row) and per week (column), in the second block the actual effort up to the current period and from there, the remaining effort. The third block lists the progress (difference in the percentage of completion) and the other blocks contain the earned value and the key figures derived from it.

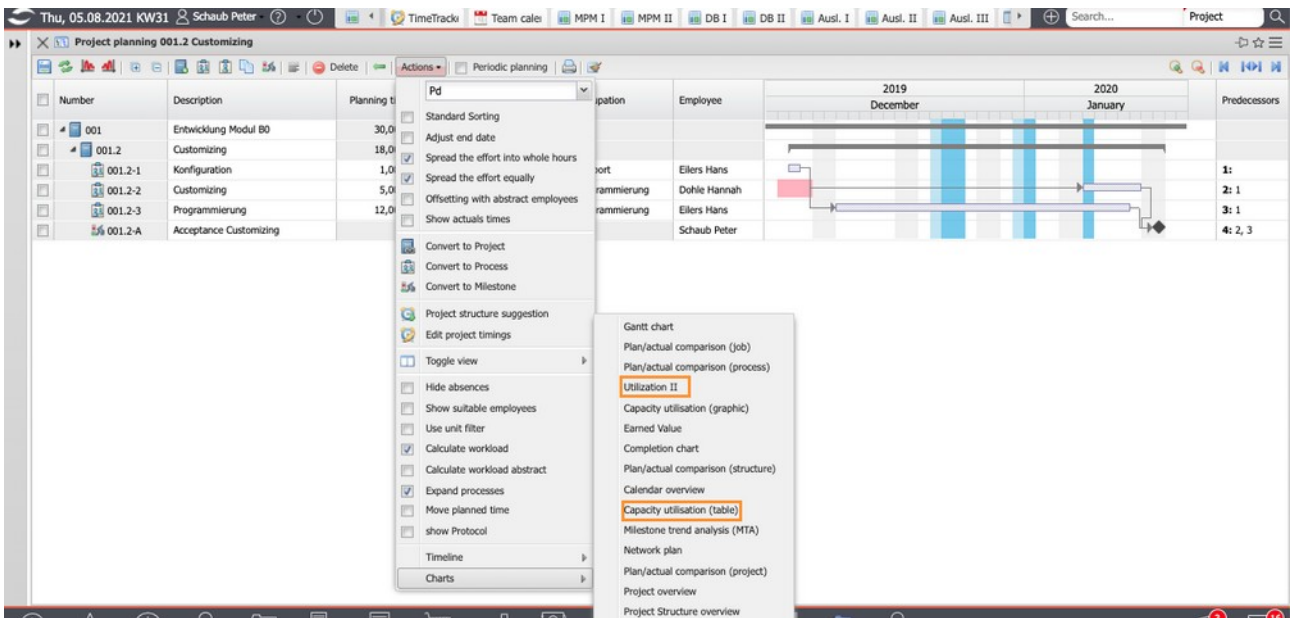
The first illustration of the report visualizes the key figures BCWS, ACWP and BCWP. The green graph shows the planned expenses cumulated up to this point in time, the orange graph shows the accumulated expenses cumulated up to this point in time, and from the current period onwards the estimated expenses. The violet graph represents the cumulative planned effort of the activities completed up to this point in time. The option "Display costs" displays costs instead of efforts.



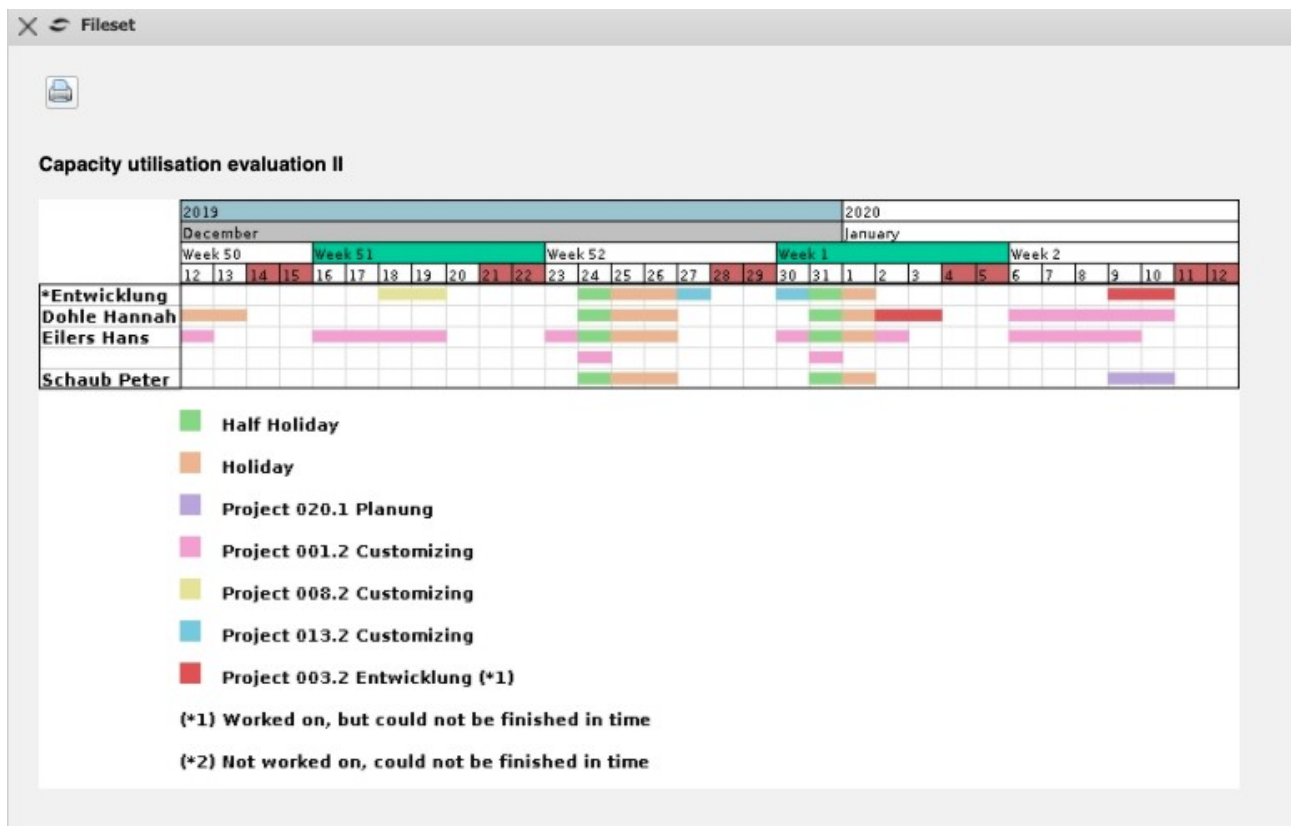
The second figure visualizes the deviations time BCWP - BCWS, budget BCWS - ACWP and costs BCWP - ACWP.

9.1.3 Report from Project Planning

The reports in project planning are located under "Actions - Charts". Many reports in project planning are also stored in the project itself. In addition to these reports, resource reports are also available.



In the following example, the logged-in user wants to see a graphical workload overview of the employees of "his" project (but: of all projects). The report "Utilization II" generates an overview of all tasks of the employees and arranges them according to their plan periods.



In the first row of employees, the workload of the employees is displayed in three categories (red - overloaded, yellow - busy and green - normal workload). The threshold values can be set by the administrator (upper utilization limit and lower utilization limit). In addition, the first line for each employee also contains the planned absences (in the example: leave).

All of the employee's work packages are displayed in the lines under the employee name so that resource conflicts can be resolved if the workload is overloaded.

In the next example, the logged-in user wants to see a tabular workload overview of the employees of "his" project (but: of all projects). The report "Capacity report II" generates an overview of all tasks of the employees and arranges them periodically according to their planned periods.

This report generates an employee-related overview of all planned tasks of the employees for any period in the period under consideration. In the tabular display, the planned percentage project times of the employees are listed here over the periods. The periods can be selected by the administrator in the "Parameters" tab (default setting: weekly). The report can also graphically illustrate the planned capacities if the option "with illustration" is set.

Capacity evaluation II: 12.12.2019 - 12.01.2020
(All values in %)

| Employee | Project | 12.12.2019 - 15.12.2019 | CW 51 | CW 52 | CW 1 | CW 2 |
|--------------|--------------------------------|-------------------------|---------------|---------------|---------------|---------------|
| *Entwicklung | 003.2 Entwicklung Advance | 0,00 | 0,00 | 0,00 | 0,00 | 0,69 |
| | 008.2 Customizing BeingPlanned | 0,00 | 1,71 | 5,81 | 0,82 | 0,00 |
| | 013.2 Customizing Passive | 0,00 | 0,00 | 0,47 | 1,26 | 1,26 |
| | Total | 0,00 | 1,71 | 6,28 | 2,08 | 1,94 |
| Dohle Hannah | 001.2 Customizing Active | 0,00 | 0,00 | 0,00 | 0,00 | 100,00 |
| | 003.2 Entwicklung Advance | 0,00 | 0,00 | 0,00 | 28,57 | 40,00 |
| | Absences | 100,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| | Dates | 0,00 | 13,75 | 0,00 | 0,00 | 0,00 |
| | Total | 100,00 | 13,75 | 0,00 | 28,57 | 140,00 |
| Eilers Hans | 001.2 Customizing Active | 100,00 | 100,00 | 100,00 | 100,00 | 100,00 |
| | Total | 100,00 | 100,00 | 100,00 | 100,00 | 100,00 |
| Schaub Peter | 020.1 Planung Passive | 0,00 | 0,00 | 0,00 | 0,00 | 38,26 |
| | Dates | 0,00 | 13,75 | 0,00 | 0,00 | 0,00 |
| | Total | 0,00 | 13,75 | 0,00 | 0,00 | 38,26 |

Both resource reports use the same algorithms to determine the workload of an employee.

The project times are the sum of all planned tasks of the employee in the period under review (assuming equal distribution). Actual times or remaining workload/degree of completion are taken into account.

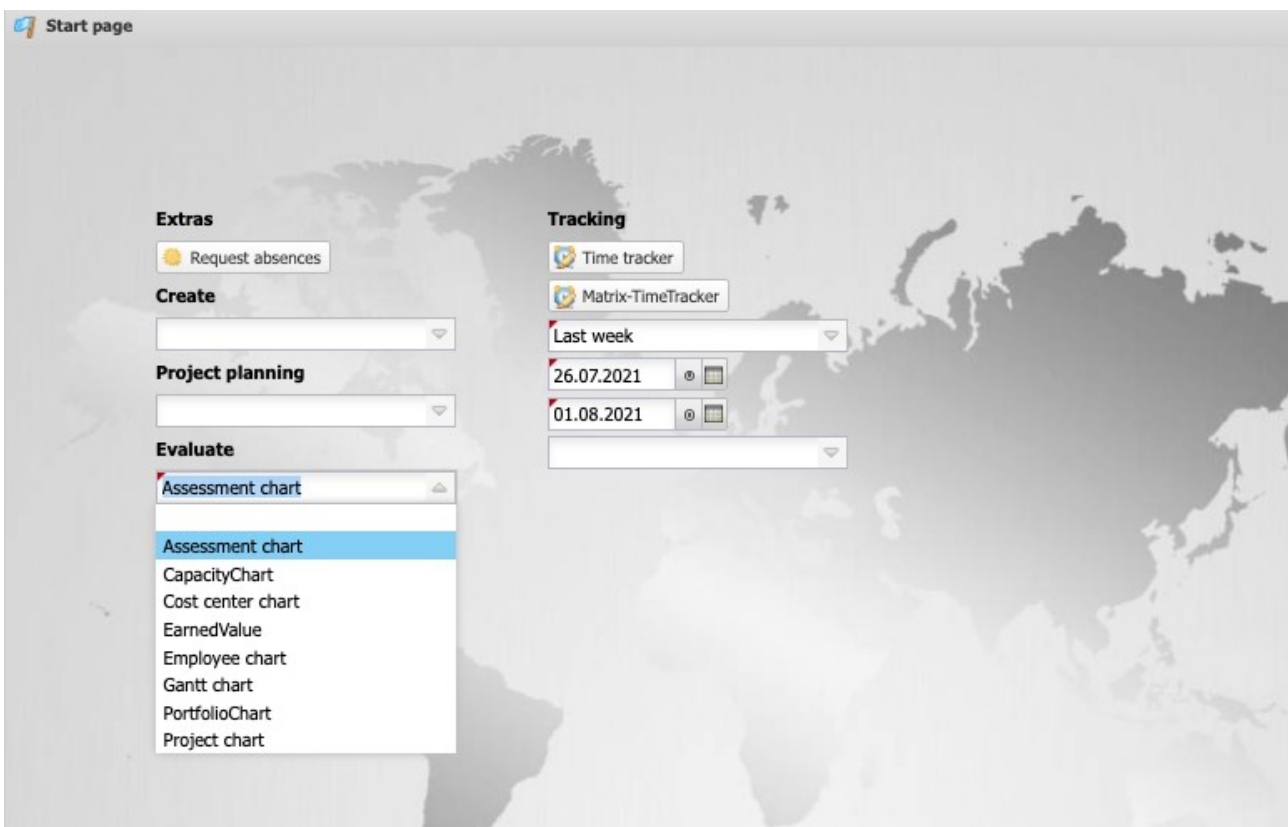
The working time is derived from the employee's planned working time, taking into account planned absences (usually vacation). The maximum workload is then the quotient of the planned project time and the planned working time in the analysis interval, assuming that the planned projects also become active. The value of the probable workload also takes into account the project probability of the passive projects and schedules the project times for these

tasks only proportionally. The free capacity is the difference between the maximum utilization of an employee (from the master data) and the maximum utilization in the analysis period.

9.2 Universal Standard Report

The standard reports in the TimeTracker, Project and Project Planning are easy to use because the selection criteria are already stored here. For the report "time statements", for example, the selection criterion "logged in user" is used in the TimeTracker and for the same report from the project, all employees of the project are used as selection criteria.

If other selections or restrictions are required, the universal standard reports can be used. The standard reports are grouped into thematic report blocks. The reports can be opened in the work area using the "Evaluate" function. In the following example, a business report is to be created from the report block "Assessment Chart":



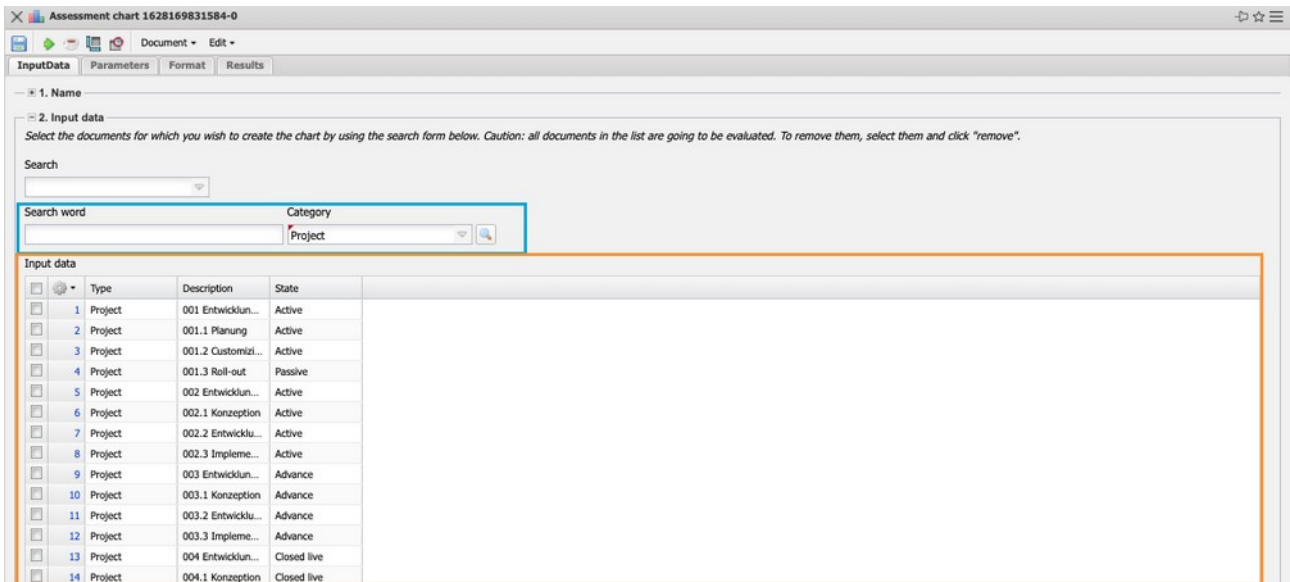
After opening the report type (here the Assessment Chart), an report screen opens. In this screen, you can configure selection criteria and options for the report.



In the first part (1st name), first select one of the available reports - here "Invoiced expenses (projects)" - and, if necessary, assign a report compilation if, for example, an alternative report definition is to be used. If necessary, a name is also entered here if the report is to be saved. Saving the report is useful if the selection criteria of the reports remain constant (for example, a list of all active projects for the current quarter). This saved report can then be transferred to portals or automated using time services. Furthermore, reports can also be generated in the background ("coffee cup").



In the second part (2nd input data) the input data (the selection criteria) of the report are determined. In the example, the "search engine" is used to select the selection criteria. In the example, all projects (selected category) that contain the term "userob" are used as input data. This process can also be carried out several times and also with different categories (such as employees or contacts).



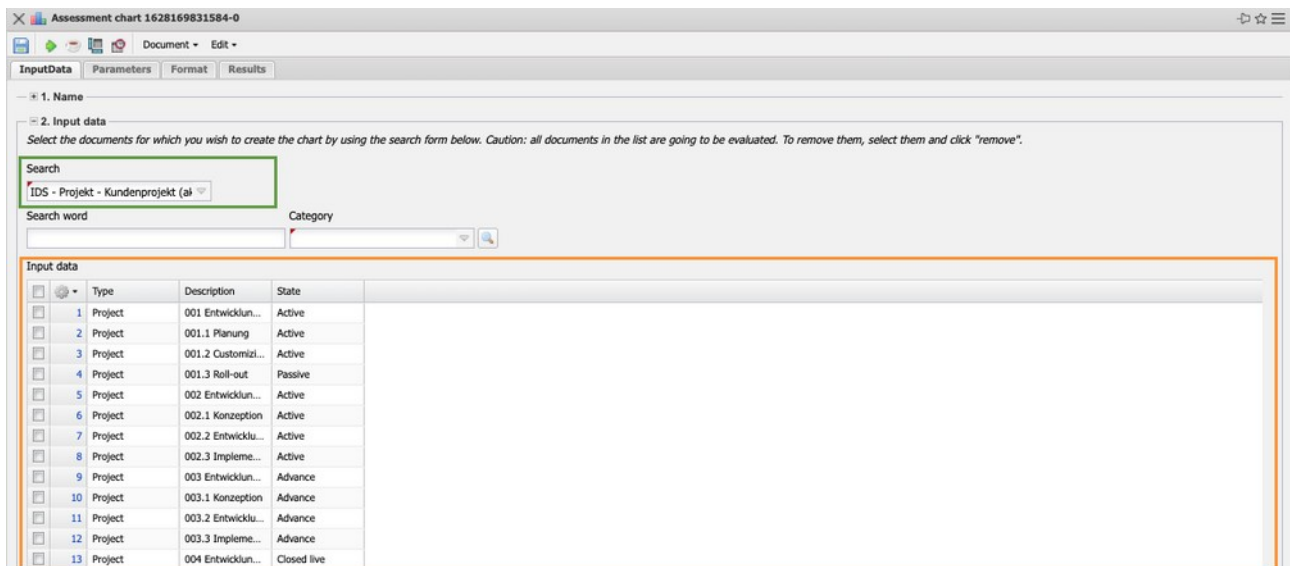
In the third part (3rd main parameter) the input data can be limited in time and then the report can be generated ("green arrow"):



The report "Billed Expenses" shows for the selected selection (here two projects) among other things the planned, ordered, recorded, billable and billed expenses:

| Project | EstimatedTime[h] | ActualTime[h] | Billable time | Billed time | Difference | Actual cost | BilledCost | BilledCost(Netto) | ConfirmationTime |
|--|------------------|---------------|---------------|-------------|------------|-------------|------------|-------------------|------------------|
| 001 Entwicklung Modul B0 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 821,43 | 0,00 | 0,00 | 0,00 |
| 002 Entwicklung Modul A | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 1.014,51 | 0,00 | 0,00 | 0,00 |
| 003 Entwicklung Modul C | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 004 Entwicklung Modul | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 005 Einführung EPM | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 008 Einführung Fibu | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 009 Beratung "Einkauf und Beschaffung" | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 011 Entwicklung Modul B | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 013 Einführung EPM | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 014 Einführung Projectile | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 19,20 | 0,00 | 0,00 | 0,00 |

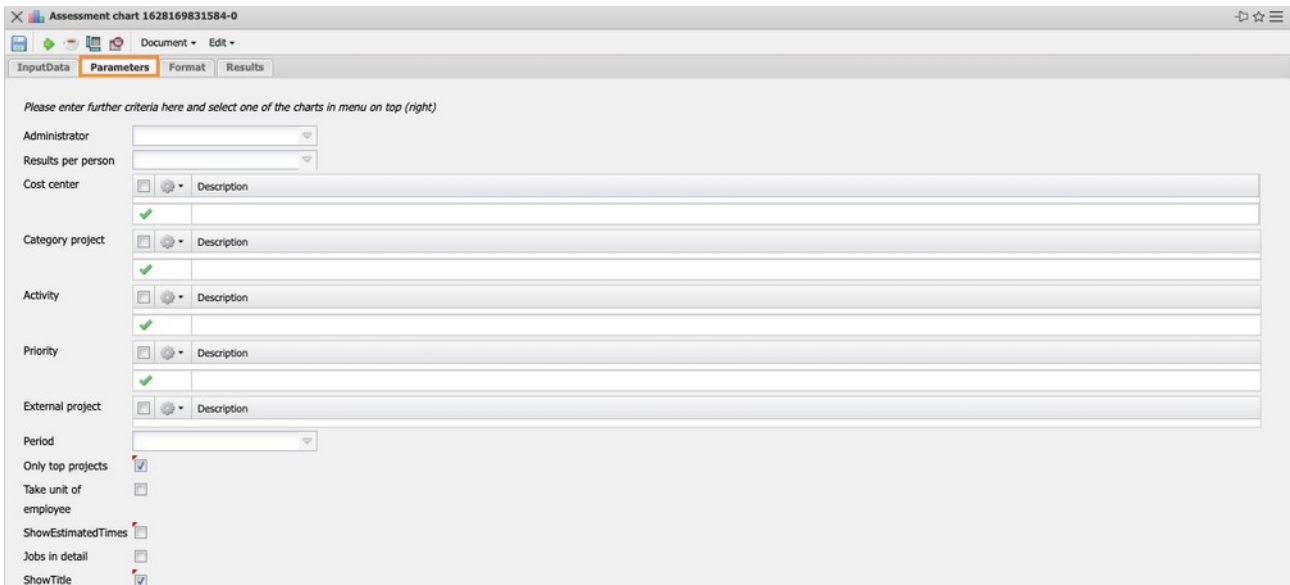
Another possibility to select the input data is the "professional search" (see help, part 10). The example uses the query "IDS - Customer Projects", which lists all active customer projects and transfers them to the input data:



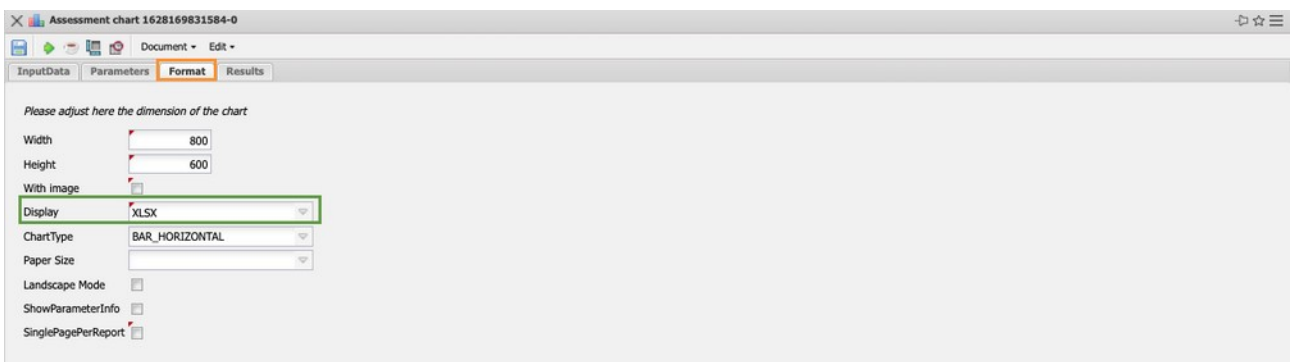
The report "Billed expenses" then displays the key figures for the selected projects:

| Project | EstimatedTime[h] | ActualTime[h] | Billable time | Billed time | Difference | Actual cost | BilledCost | BilledCost(Netto) | ConfirmationTime |
|--|------------------|---------------|---------------|-------------|------------|-------------|------------|-------------------|------------------|
| 001 Entwicklung Modul B0 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 821,43 | 0,00 | 0,00 | 0,00 |
| 002 Entwicklung Modul A | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 1.014,51 | 0,00 | 0,00 | 0,00 |
| 003 Entwicklung Modul C | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 005 Einführung EPM | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 009 Beratung "Einkauf und Beschaffung" | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 011 Entwicklung Modul B | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 014 Einführung Projectile | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 19,20 | 0,00 | 0,00 | 0,00 |
| 019 Entwicklung Modul J | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 022 Einführung Fibu | 5,20 | 3,00 | 3,00 | 0,00 | -3,00 | 4.671,00 | 0,00 | 0,00 | 0,00 |
| 025 Einführung EPM | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 031 Katalogprojekt | 0,00 | 6,50 | 6,50 | 0,00 | -6,50 | 370,50 | 0,00 | 0,00 | 0,00 |
| 045 Einführung EPM | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 047 Einführung EPM | 0,00 | 1,00 | 1,00 | 0,00 | -1,00 | 57,00 | 0,00 | 0,00 | 112,00 |
| 050 Demo 12 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 058 Einführung EPM | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 061 Einführung EPM | 154,82 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 |
| 067 Tickets | 21,60 | 8,00 | 8,00 | 0,00 | -8,00 | 456,00 | 0,00 | 0,00 | 0,00 |
| 072 Testprojekt | 360,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 0,00 | 120,00 |
| | 541,63 | 18,50 | 18,50 | 0,00 | -18,50 | 7.409,64 | 0,00 | 0,00 | 232,00 |

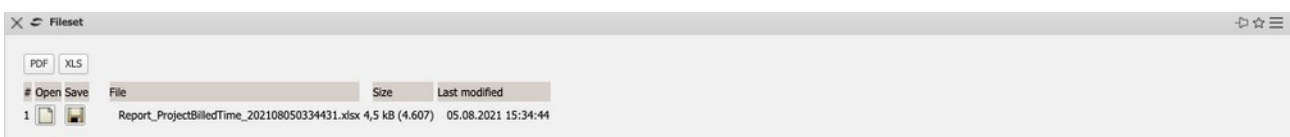
On the "Parameters" tab, further criteria can be used to limit the results of the reports in a meaningful way. These parameters include, for example, the cost center of the project, the project type, the project status, the priority and the indicator whether the project is an external cost order or not. The other options concern the filtering of results. Depending on the report block, additional parameters are added.



On the "Format" tab, for example, the width and height of images in pixels and the output format ("Display" - as in the intermediate export dialog) can be selected. In the example, "XLSX" is selected and ...



... the system generates the report directly as MS EXCEL file:



The report results are managed on the "Results" tab. The report results are only saved permanently if the report block is saved (for time services, portals and background reports). The number of results can be set in the "Max. number of results" field.

Assessment chart 1628169831584-0

Document - Edit

InputData Parameters Format Results

Here you find the results of charts previously performed

MaxResults 10

| Results | Type | Owner | Created |
|---------|---------------------|--------------|------------------|
| 1 | 06 - Invoiced ti... | Schaub Peter | 05.08.2021 15:34 |
| 2 | 06 - Invoiced ti... | Schaub Peter | 05.08.2021 15:32 |
| 3 | 06 - Invoiced ti... | Schaub Peter | 05.08.2021 15:29 |
| 4 | 06 - Invoiced ti... | Schaub Peter | 05.08.2021 15:29 |
| 5 | 06 - Invoiced ti... | Schaub Peter | 05.08.2021 15:28 |

In the next example, a capacity utilization overview is to be created from the report block "capacity report". After opening the report type, an report screen opens.

Start page

Extras

Request absences

Create

Project planning

Evaluate

CapacityChart

Queries

Tracking

Time tracker

Matrix-TimeTracker

Last week

26.07.2021

01.08.2021

After selecting the report "Utilization overview III" (see also section 9.1.3) and entering a name, the mask is saved. Using a professional search, the input data are ...

Capacity evaluation 1628170603362-0

Document Edit View

InputData Parameters Format Results

1. Name

If you would like to save a chart please enter a description

Description: 7

Chart: 11 - Capacity utilisation evaluatio

Report:

Selection:

2. Input data

Select the documents for which you wish to create the chart by using the search form below. Caution: all documents in the list are going to be evaluated. To remove them, select them and click "remove".

Search:

Search word: Category:

... for sure. The professional search in the example transfers all active permanent employees to the input data:

Capacity evaluation 1628170603362-0

Document Edit View

InputData Parameters Format Results

1. Name

2. Input data

Select the documents for which you wish to create the chart by using the search form below. Caution: all documents in the list are going to be evaluated. To remove them, select them and click "remove".

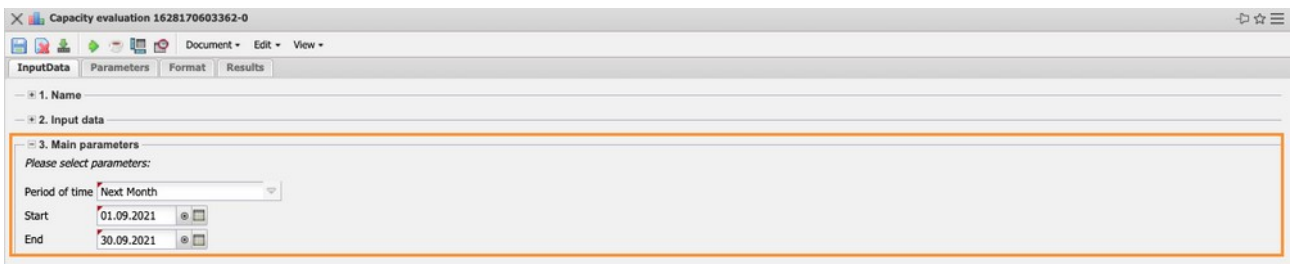
Search: IDS - Personal - Mitarbeiter (akth)

Search word: Category:

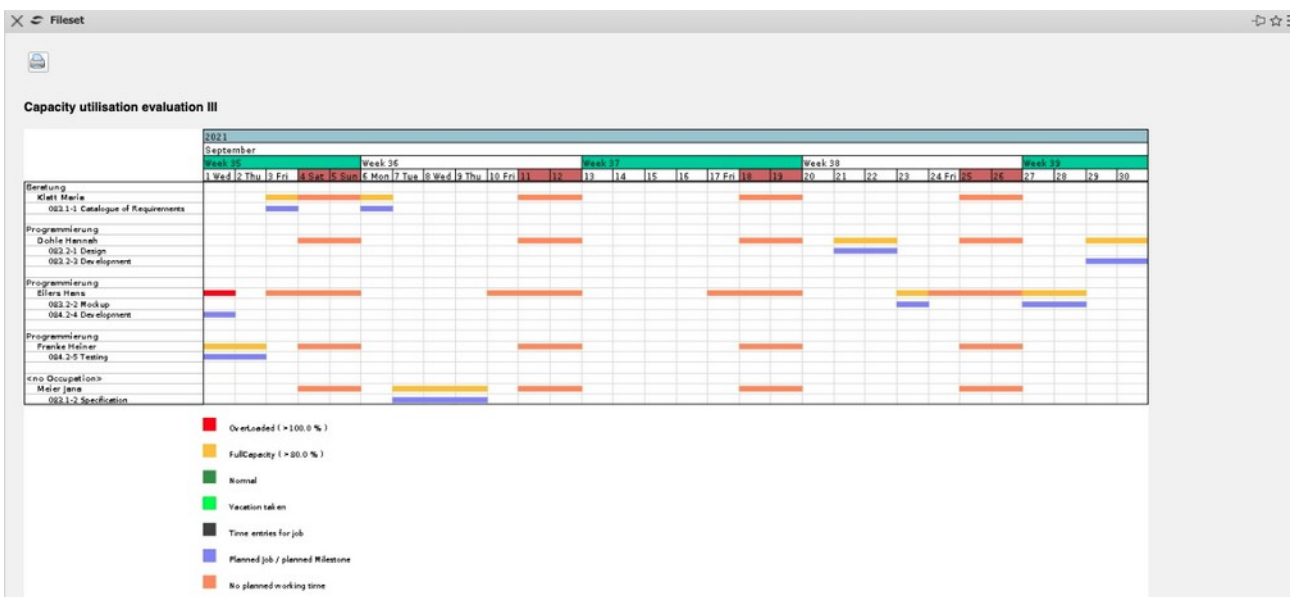
Input data

| Type | Description | State |
|-------------|---------------|-------|
| 1 Employee | Dohle Hannah | |
| 2 Employee | Ellers Hans | |
| 3 Employee | Franko Heiner | |
| 4 Employee | Jahnke Kevin | |
| 5 Employee | Jansen Heidi | |
| 6 Employee | Klatt Maria | |
| 7 Employee | Klausen Fritz | |
| 8 Employee | Maier Gabi | |
| 9 Employee | Meier Jan | |
| 10 Employee | Meier Jana | |
| 11 Employee | Meier Jana | |

Then the report period is determined and the report is generated. The period "Next month" always means the next 30 days:



The report "Capacity Utilisation Evaluation III" generates (as already described) a forecast for the selected employees:



This variant presents the planned tasks in great detail on the basis of the work packages and does not take into account the project probability for planned projects. This can be changed by the user on the "Parameters" tab, e.g. the option "Workload grouped on projects" changes the level of detail (instead of work packages now sub-projects) and the option "Consider project probability" considers the workload of planned projects proportionately:

Capacity evaluation 7

Document - Edit - View -

InputData Parameters Format Results

Please enter further criteria here and select one of the charts in menu on top (right)

Administrator: []

Results per person: []

Cost center: []

Category project: []

External project: []

Production effort: []

Period: []

ScaleMax: []

DisplayCapacity: []

RelevantProjectActivities: []

UpperLimit: 100 %

LowerLimit: 80 %

ProjectUtilization:

HideJobDetail:

Show absences:

UseProjectProbability:

ShowTitle:

TeamMembersDetail:

NormalizedToPercent:

ImageOnlyWithAbstract:

UseExtraLines:

UseDistribution:

OptionNoInputData: no input data

Afterwards, the report is generated again and presents itself more clearly and with regard to the probability also more precisely:

