

Projectile Version 5.9

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 ...

🗙 😳 TimeTracker Schaub Peter			₽☆≡
🖹 🤹 28.06.2021 🔹 🔳 🖲 🕑	Actions - Filter -		
	Show free jobs 01 - Finalize last month 02 - Finalize current	Note	Filter
Day 01: Monday, 28.06.2021 CW26	Request absences		
2 2 3 2 4 2	Time sheet (internal) Attendances and absences Absences		
	Service report		
Day 02: Tuesday, 29.06.2021 CW26 6 6	✓ [™]		

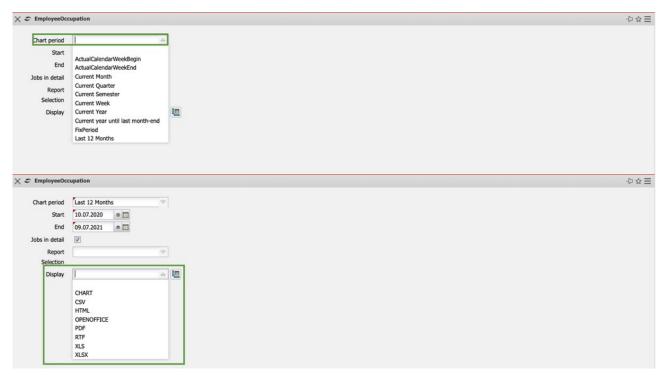
... an intermediate dialog opens. This intermediate dialog opens for almost all standard reports and allows, among other things, the entry of an report period and is often preset (in the TimeTracker usually the last calendar month, in the project usually the project period). The report period can be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

८ ङ Fileset					
PDF XLS					
EmployeeOc	cupation				
Description	Job	Employee Occup	ation Ist-Beoi	nn Ist-Ende	Actual [h]
Einführung Fibu	022.1-4 Aufgabe mit 2 1	Tickets Schaub Peter Beratu	ing 14.07.2	020 26.08.2020	6,00
Katalogprojekt Einführung EPM	031.1-1 Item A 047-1 Projektmanagem		mmierung - Java 26.08.2 Management 10.07.2	020 28.08.2020	
	047.1-1 Konzeption	Schaub Peter Beratu	ng 21.07.2	020 27.08.2020	
Test	049-1 AP 1	Schaub Peter Interne		020 09.10.2020	
Tickets Studie A	067-1 Job mit Tickets 068.1-3 a1	Schaub Peter Interne Schaub Peter Beratu		020 13.08.2020	
					69,25
Einzelnachw	eise				
	ne Project	Job	Occupation		TTComment
		047-1 Projektmanagement	Project Management	Schaub Peter	
		022.1-4 Aufgabe mit 2 Ticket 047-1 Projektmanagement	s Beratung Project Management	Schaub Peter Schaub Peter	
		047.1-1 Konzeption	Beratung		oipuzoiupituziuetrzuo
		049-1 AP 1	Interne Tätigkeit	Schaub Peter	
		068.1-3 a1	Beratung - Junior	Schaub Peter Schaub Peter	
		047.1-1 Konzeption 067-1 Job mit Tickets	Beratung Interne Tätigkeit	Schaub Peter	lest 1
		067-1 Job mit Tickets	Interne Tätigkeit	Schaub Peter	
		068.1-3 a1	Beratung - Junior	Schaub Peter	ghtzertztrzer
		049-1 AP 1	Interne Tätigkeit	Schaub Peter	
		068.1-3 a1 022.1-4 Aufgabe mit 2 Ticket	Beratung - Junior s Beratung	Schaub Peter	adgfesadgaes
		031.1-1 Item A	Programmierung - Java		03933
26.08.2020 4.	00 068.1 Phase 2	068.1-3 a1	Beratung - Junior	Schaub Peter	sadß

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 ...

💈 28.06.2021 🔹 🗖 🕚 🕑	Actions - Filter -		
	Show free jobs O1 - Finalize last month		Filter
From To Ho	0	Note	
Day 01: Monday, 28.06.2021 CW26	Request absences		
1 🙀	Time sheet (external)		
2 📓	Time sheet (internal)		
3 💽	Attendances and absences		
4 🙀	Absences		
5 🙀	Service report		

... an intermediate dialog opens.

Chart period Last 12 Months Start 10.07.2020 General Genera	Time sheet				-
End 09.07.2021 Report Selection	Chart period	Last 12 Month	hs	v	
Report Selection	Start	10.07.2020	•		
Selection	End	09.07.2021	•		
	Report				
Display 🖤 🛄	Selection				
	Display				

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 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.

C Fileset									Ð
PDF XLS									
Time shee	ət								
			mber = 003						
Date	Weekday		Eintrag	Sollzeit	Istzeit		Externe Bemerkung	Interne Bemerkung	
Total 10.07.2020	Total	Total	Total	Total	Total	Total	Total		
10.07.2020	Fn	08:00-15:00	047 - Projektmanagement	6,00	7,00	1,00			
11.07.2020	Sat			0,00		0,00			
2.07.2020				0,00		0,00			
3.07.2020				8,00		-8,00			
14.07.2020	Tue		022 - Aufgabe mit 2 Tickets		3,00				
		11:00-14:00	047 - Projektmanagement		3,00				
				8,00		-2,00			
5.07.2020				8,00		-8,00			
6.07.2020				8,00		-8,00			
8.07.2020				0,00		0,00			
9.07.2020				0,00		0,00			
20.07.2020				8,00		-8,00			
1.07.2020		08:00-11:30	047 - Konzeption	-,	3,50		oipuzoiupituziuetrzuo		
		11:30-15:45	049 - AP 1		4,25		tlkzulterz		
				8,00		-0,25			
22.07.2020				8,00		-8,00			
23.07.2020				8,00		-8,00			
24.07.2020				6,00		-6,00			
25.07.2020				0,00		0,00			
27.07.2020				8,00		-8,00			
				0,00	0,00	-0,00			

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

💈 28.06.2021 🔹 🔳	Actions • Filter •		
2 3	Show free jobs Ol - Finalize last month		Filter
From To Hour		Note	
Day 01: Monday, 28.06.2021 CW26	Request absences		
1 1	Time sheet (external)		
2 😰	Time sheet (internal)		
3 🙀	Attendances and absences		
4 😰	Absences		
3 😰	Service report		

... 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.

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F XLS										
Vorking '	Timo	Chart								
TOTKING	inne	Gilan								
Date	Dav	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		
04.07.2021								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		
11.07.2021	Sun	Free						0,00		
2.07.2021	Mon	Away					0,00	8,00	-8,00	-60,00
3.07.2021		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		Free						0,00		
8.07.2021								0,00		
19.07.2021		Away					0,00		-8,00	-98,00
20.07.2021		Away					0,00		-8,00	-106,00
21.07.2021		Away					0,00		-8,00	-114,00
22.07.2021		Away					0,00		-8,00	-122,00
23.07.2021		Away					0,00		-6,00	-128,00
24.07.2021		Free						0,00		
25.07.2021	Sun	Free						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 ...

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General data Stal	047.2	Proposal	Portfolio	Risk assess	nent Status	Key figures	Administra	lling 🕨	ng documents	Order data	Logbook	Final Report	Misc		
Contents description Start of planning	25.02.2020 • End of planni					K Hourly rat	▶ ectories	Gantt chart	e analyse omparison (job)						
Structure									Plan/actual co	omparison (proci omparison (proje					
Main project									Recording back list Time sheet (external)				Actual time	LastStateEstimate	EnterNewState

... an intermediate dialog opens.

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art 26.02.2020 🔹 🥅	
nd 06.03.2020 👁 🛄	
splay	
port Selection 🗢	
Perform now	Perform in background

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

₽☆Ξ

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.

$ imes$ ε Fileset				
PDF XLS				
EmployeeOccupation	on			
047.2-2 Programmierung	047.2 Customizing	1: Möller Marjan 1: Zöllner Pia 2: Dohle Hannah 1: *Support	Support	Actual [h] Ist-Beginn I
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 ...

Project 047.2	Customizing													-口 ☆
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General data Stal		roposal Po	ortfolio Ris	k assessment	Status Key 1	igures Statu	Planning Administration Offers / Billing	ig documents	Order data	Logbook	Final Report	Misc		
Description	Customizing 26.02.2020 End of plannin						Hourly rates	Santt chart	ie analyse	-				
description Start of planning Note							Set project activity	Plan/actual of Pla	comparison (job) comparison (proc	ess)				
Structure Main project	047 Einführu	ing EPM		Parent 0	47 Einführung EPM	1		 Project overv Recording be 						
Cubandinate	Im Los			project				ime sheet (
Subordinate projects	- @ ·	Number A	Descriptio	n Status	Begir	plannin	g End planning	Project manager	-	me Pi D:00	00:00	Actual time 00:00	Exter LastStateEstimate	EnterNewState

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

$ imes$ $ ilde{s}$ Fileset						
PDF XLS						
EmployeeOccupatio	on					
	Project		Occupation	Actual [h]	Ist-Beginn	Ist-Ende
047.2-2 Programmierung 047.2-3 Testen	047.2 Customizing 047.2 Customizing 047.2 Customizing 047.2 Customizing	1: Zöllner Pia 2: Dohle Hannah 1: *Support	Support Programmierung Support Dokumentation			
047.2-4 Dokumentation	047.2 Customizing	1. Support	Dokumentauon			
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.

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eneral data Sta Basic information Number Description	047.2	n							ning inistration s / Billing fy rates	ng documents	Order data	Logbool	Final Report	Misc			
Contents description	scription							Chart	ts 🕨 🕨	Santt chart	e analyse						
Start of planning Note	t of planning 26.02.2020 • E End of plann						nd of plannin	Set p	project activity	Plan/actual of	omparison (job) omparison (pro omparison (proj	cess)					
Structure										Project overv	iew						
Main project							g EPM			Recording ba Time sheet (e)							
Subordinate projects	0.	Orgen Part Part Part Part Part Part Part Part						ng E	ind planning	Project manager	• larget t	ime P 0:00	lanning time 00:00	Actual time 00:00	_	LastStateEstimate	EnterNewState

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.

	Gantt																				-D 🗅
Gantt																					
34	3	Cha	rt		∇																
/w			1300		N 4 2	6.02.2020	•	4 06.03.	2020 ®		1										
2			Show projects	S	how jobs 💟	Show link	s 🔄 ShowCr	iticalPath													
			Show 🔽	Show	Planned		Show	absences													
	12	-	milestones		111																
			ShowProcesses	Show	vTracked		e (Day/Partial) (Day/Half)														
a)																					
R												February 2	20			March 2020					
a,												Week 9		28.54	20 Cat		Wook 10	10.7.0	Li West	E Thu	4.0
	Duration	Fixed	Description	Status	Planning time		Occupation	Employee	Start		gantt		27 Thu	28 Fri	29 Sat	March 2020	Week 10 2 Mon	3 Tue	4 Wed	5 Thu	6 Fri
umber	Duration	0	Customizing	Status Active	Planning time	Target time 112,00	Occupation	Employee	26.02.2020	End 06.03.2020	gantt	Week 9		28 Fri	29 Set			3 Tue	4 Wed	5 Thu	6 Fri
umber 17.2 17.2-A	Duration	0	Customizing Abnahme Customzing	Active		112,00		*Beratung	26.02.2020 06.03.2020	06.03.2020	gantt	Week 9		28 Fri	29 Set			3 Tue	4 Wed	5 Thu	la Fri
umber 17.2 17.2-A 17.2-1	Duration	0	Customizing Abnahme Customzing Konfiguration	Active	8,00	8,00	Support	*Beratung Möller Marjan	26.02.2020 06.03.2020 26.02.2020	06.03.2020 27.02.2020	gantt	Week 9	27 Thu	28 Fri	29 Set	1 Sun		3 Tue	4 Wed	5 Thu	*
	Duration	0	Customizing Abnahme Customzing	Active running running		8,00		*Beratung	26.02.2020 06.03.2020	06.03.2020	gantt	Week 9		28 Fri	29 Set			3 Tue	4 Wed		

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.

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- 🗈 🛓 🖬 🕅	2 0	2 🗉 🔥 🛙	ti 🔍 Doc	cument + Ed	lit + View +	Back references -	Actions -								
General data Stal	n 047.2	Proposal	Portfolio	Risk assess	sment Stat	tus Key figure	Administration	•	Order data	Logbook	Final Report	Misc			
Description	tents							Execute value	a anabero	_					
Contents description	ription					End of planning	Charts	is 🍓 Gantt chart	omparison (job)	_					
Note	the second secon							Plan/actual co	omparison (proces omparison (project						
E Structure								Project overv	iew						
Main project						führung EPM		Recording based in the sheet (e)							
Subordinate projects		• Number -	Desc	ription	Status	Begin plann	ing End plann				ing time 00:00	Actual time 00:00	Exter Last	StateEstimate	EnterNewState

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.

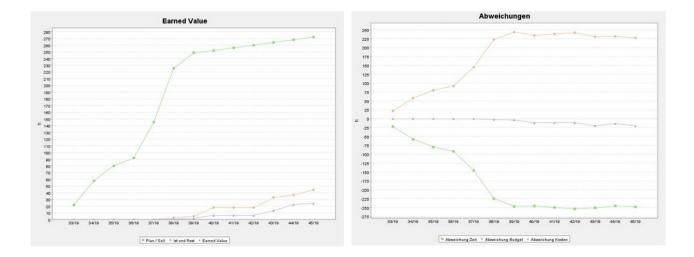
The report first displays the key figures from Earned Value Analysis in tabular form. The administrator can select the time period as the column for the plan, actual (and remaining), progress (percentage of completion in the current period minus the percentage of completion in the last period), earned 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 determine 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.

© Fileset				
184				
Earned Value				
generated by Schaut	Peter, 09.07.2021	12:47:34		
26.02.2020 - 06.03.2	020			
Planned (h) P	art	Total	9/20	10/20
047.2 Customizing	100.00			0 89,60
Sum	100,00			0 89,60
		accumulat	led 22,40	0 112,00
Tracked [h] D 047.2 Customizing	Veviation from plan -112,00		00 0.00	0,00
047.2 Customizing Sum	-112,00		00 0,00	
oum	*112,00	accumulat		
		accumulat	eu 0,00	0,00
Progress [%] S	itate			
047.2 Customizing	planned	0,	00,00	0,00
EarnedValue [h] S				
047.2 Customizing Sum	planned		00 0.00	0,00
Sum	in progress < Plan	accumulat		
		accorriging		0,00
Figures [h]			9/20	10/20
Planned				0 112,00
Tracked				0,00
Earned Value		BCV	VP 0,00	0,00
Difference (b)				
Differences [h] Difference Time		BCWP - BCV		
Difference Budget		BCWP - BCV BCWS - ACV		
Difference Cost		BCWP - ACV		
Constant Const				- 0,00

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.

	001.2 Customizing								中立日
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Number	Description	Planning ti	Pd	pation	Employee		2019	2020	Predecessor
	Description	Pignining u	Standard Sorting	ipauon	Employee		December	January	Predecesso
4 001	Entwicklung Modul B0	30,0	Adjust end date						
001.2	Customizing	18,0				_			
001.2-1	Konfiguration	1,0		port	Eilers Hans				1:
001.2-2	Customizing	5,0	Offsetting with abstract employees	rammierung	Dohle Hannah				2: 1
001.2-3	Programmierung	12,0	Show actuals times	rammierung	Eilers Hans		×		3: 1
5 001.2-A	Acceptance Customizing			-	Schaub Peter				4: 2, 3
			Edit project timings Toggle view Ide absences Show suitable employees Use unit filter Calculate workload Calculate workload abstract Expand processes Move planned time	Plan/act Utilizatio Capacity Earned V Complet Plan/act Calenda Capacity	ual comparison (job) ual comparison (proces n II utilisation (graphic)				

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.

				n II																										
	2019																		202	-							_			
		ember	-				_		_		1						L.		Jani	uary					1.0					
	Week	13 14	15	Week 5		8 19	20	21	22		ek 52		25	27	28	29	Wee 30	31	li .	2	2	4	5	Wee 6	7	0	9	10	11	12
*Entwicklung	46	13 114	10	A.2. 147		2 142		-		6.5	16.4	100	16.0	16.1		12.3	20	1.2.4	-	6	-	-	-	v			-	140		145
Dohle Hannah																				-	-									
Eilers Hans										-							-							-						
Schaub Peter																			-								-	-		
	(+1)	Holid Proje Proje Proje Proje Work	ect 02 ect 00 ect 00 ect 01 ect 00)1.2 ()8.2 ()3.2 ()3.2 E	Cust Cust Cust	tomia tomia tomia wickl	zing zing ung	(*1)		he	d in	tim	ne																	

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 employ-ee 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.

€ Fileset						
_						
Capacity eval	uation II: 12.12.2019 - 12.01.202	0				
(All values in %	b)					
Employee	Project	12.12.2019 - 15.12.2019	CW 51	CW 52	CW 1	CW 2
Linployee	110,000	12.12.2010 10.12.2010	011 01	011 02		0112
*Entwicklung	003.2 Entwicklung Advance	0,00	0,00	0,00	0,00	0,69
	008.2 Customizing BeingPlanne	d 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
Deble Henneb	001.0 Quetemising Active	0.00	0.00	0.00	0.00	100.00
Donie Hannan	001.2 Customizing Active	0,00				100,00
	003.2 Entwicklung Advance Absences	0,00			-	40,00
	Dates	100,00	0,00 13.75			
	Total	. 1	13,75		28,57	
	Iotai	100,00	13,75	0,00	20,57	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":

Extras		Tracking
Request absence	IS .	🔯 Time tracker
Create		🔯 Matrix-TimeTracker
		Last week
Project planning		26.07.2021 •
		01.08.2021 🛛 🗉 🗖
Evaluate		
Assessment chart		2 44 200
Assessment chart		33
CapacityChart Cost center chart EarnedValue		and the second sec
Employee chart		
Gantt chart PortfolioChart Project 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).

i ulla	Assess	ment chart 1	628169831584-0			口 (1)
		U 😰 D	ocument + Edit +			
put	Data	Parameters	Format Results			
	Name					
	Input		which you wish to croat	a tha chart by using the	consch form holow Out	n: all documents in the list are going to be evaluated. To remove them, select them and click "remove".
Sele	ct the a	ocuments for	which you wish to creat	e the chart by using the	search form below. Caud	n: all documents in the list are going to be evaluated. To remove them, select them and takk remove .
Sear	ch					
			Ŷ			
Sear	ch word	t		Category		1
				Project	▽ 🔍	
	t data				10.0	
	t data					
		Туре	Description	State		
		Project	001 Entwicklun	Active		
	2	Project	001.1 Planung	Active		
	3	Project	001.2 Customizi	Active		
	4	Project	001.3 Roll-out	Passive		
	5	Project	002 Entwicklun	Active		
	6	Project	002.1 Konzeption	Active		
	7	Project	002.2 Entwicklu	Active		
	8	Project	002.3 Impleme	Active		
	9	Project	003 Entwicklun	Advance		
	10	Project	003.1 Konzeption	Advance		
	11	Project	003.2 Entwicklu	Advance		
	12	Project	003.3 Impleme	Advance		
	13	Project	004 Entwicklun	Closed live		
1	14	Project	004.1 Konzeption	Closed live		

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:

C Fileset										
PDF XLS										
Report ProjectBilledTime										
			Dilla bia di sa		0.0		D.W. 10.	D.W. 10	0. /	
Project 001 Entwicklung Modul B0									ConfirmationTime	
	0,00	0,00			0,00	821,43			0,00	
002 Entwicklung Modul A	0,00	0,00			0,00	1.014,51	0,00		0,00	
003 Entwicklung Modul C	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	
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			0,00	0.00	0,00		0,00	
011 Entwicklung Modul B 013 Einführung EPM	0,00	0,00		0.00	0,00	0,00	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:

	Asses	sment chart 1	628169831584-0			
		U 😰 🛛	ocument + Edit +			
nputi	Data		Format Results			
· ± 1.	Name	,				
	Input					
Selec	ct the	documents for	which you wish to creat	e the chart by using th	e search form below. Caution: all documents in the list are going to be evaluated. To remove them, select them and click "remove".	
Searc	ch			1		
IDS	- Proi	ekt - Kundenpr	ojekt (ał 🗢			
	ch wor		(m.	Category		
Searc	ch wor	u		Category		
Input	t data					
	0.	Туре	Description	State		
	1	Project	001 Entwicklun	Active		
	2	Project	001.1 Planung	Active		
E	3	Project	001.2 Customizi	Active		
	4	Project	001.3 Roll-out	Passive		
	5	Project	002 Entwicklun	Active		
	e	Project	002.1 Konzeption	Active		
	7	Project	002.2 Entwicklu	Active		
	٤	Project	002.3 Impleme	Active		
	9	Project	003 Entwicklun	Advance		
	10	Project	003.1 Konzeption	Advance		
	11	Project	003.2 Entwicklu	Advance		
	12	Project	003.3 Impleme	Advance		
E		Project	004 Entwicklun	Closed live		

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

C Fileset										-01
DF XLS										
eport_ProjectBilledTime										
roject	EstimatedTime[h]	ActualTime[h]	Billable time	Billed time	Difference	Actual cost	BilledCost	BilledCost[Netto]	ConfirmationTime	
01 Entwicklung Modul B0	0,00	0,00		0,00	0,00	821,43		0.00	0,00	
02 Entwicklung Modul A	0,00	0,00	0.00	0.00	0,00	1.014,51	0,00	0.00	0.00	
03 Entwicklung Modul C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
05 Einführung EPM	0,00	0,00	0,00	0.00	0,00	0,00	0,00	0,00	0,00	
09 Beratung "Einkauf und Beschaffung"	0,00	0,00	0,00	0.00	0,00	0,00	0,00	0,00	0,00	
11 Entwicklung Modul B	0,00	0,00	0.00	0.00	0,00	0,00	0,00	0.00	0.00	
14 Einführung Projectile	0.00	0,00	0.00	0.00	0.00	19,20	0,00	0,00	0.00	
19 Entwicklung Modul J	0,00	0,00	0,00	0.00	0,00	0,00	0,00	0,00	0,00	
22 Einführung Fibu	5,20	3,00	3,00	0.00	-3,00	4.671,00	0,00	0,00	0,00	
25 Einführung EPM	0,00	0,00	0,00	0.00	0,00	0,00	0,00	0,00	0,00	
31 Katalogprojekt	0.00	6,50	6,50	0.00	-6,50	370,50	0,00	0.00	0.00	
45 Einführung EPM	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	
47 Einführung EPM	0,00	1,00	1,00	0.00	-1,00	57,00	0,00	0,00	112,00	
50 Demo 12	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	
58 Einführung EPM	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	
61 Einführung EPM	154,82	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	
67 Tickets	21,60	8,00	8,00	0,00	-8,00	456,00		0,00	0,00	
72 Testprojekt	360,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	120,00	
and the second second	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 order or not. The other options concern the filtering of results. Depending on the report block, additional parameters are added.

🗙 💼 Assessment ch	art 16281	69831584-0				-口 ☆ 三
	Docume	ent + Edit +				
InputData Param	eters F	ormat Results				
Please enter further	criteria hei	re and select one of the cha	rts in menu on top (right)			
Administrator		~				
Results per person		0				
Cost center		Description				
	1					
Category project		Description				
	1					
Activity		Description				
	1					
Priority		Description				
	1					
External project		Description				
Period		~				
Only top projects						
Take unit of						
employee ShowEstimatedTime	5 -1					
Jobs in detail	s 🖂					
ShowTitle						

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:

X S Fileset					-
PDF XLS					
# Open Save	File	Size	Last modified		
1	Report_ProjectBilledTime_202108050334431.xlsx 4	,5 kB (4.607)	05.08.2021 15:34:44		

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.

Asse	ssment c	hart	1628169831584-	0		
	1) 1	Document - Edit			
utData	Paran	eter	s Format F	tesults		
	1					
	find the n	her after	s of charts previou	sly performed		
e you i	nno me re	SUID	s or charts previou	siy performed		
axResult	s		10			
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	s 📃			Owner Schaub Peter	Created 05.08.2021 15:34	
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xResult sults		1 2 3	Type 06 - Invoiced ti 06 - Invoiced ti	Schaub Peter Schaub Peter Schaub Peter	05.08.2021 15:34 05.08.2021 15:32	

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.

		24			
Extras		Tracking		17 2	
Request absences		💆 Time track	er		1
Create		🔯 Matrix-Time	eTracker		-
	♥	Last week			-
Project planning		26.07.2021	•		
		01.08.2021	0		
Evaluate				4	~
CapacityChart					
Queries					
	0 🗢				

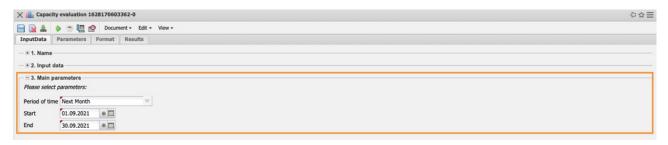
After selecting the report "Utilization overview III" (see also section 9.1.3) and entering a name, the mask is saved. Using a professional search, the input data are ...

🗙 🏭 Capacity evaluation 1628170603362-0	□☆目
🔚 🙀 🏝 🖕 🦈 🛄 💇 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	
□ Ξ 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	

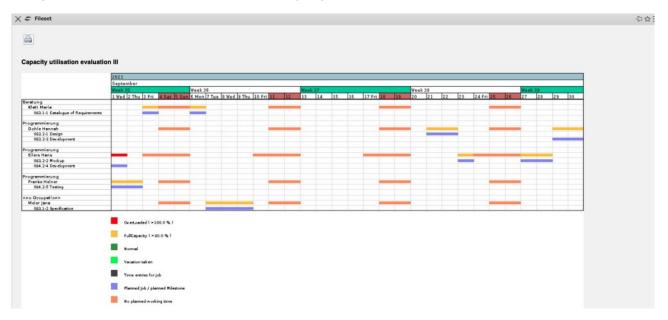
... for sure. The professional search in the example transfers all active permanent employees to the input data:

	Capac	ity evaluation 16	28170603362-0			心心
1	2	۵ 🖢 🗢 🌢	Document - E	Edit - View -		
nput	Data	Parameters	Format Result	ts		
	. Name					
	. Input					
			ich vou wish to cre	ate the chart hy usin	g the search form below. Caution: all documents in the list are going to be evaluated. To remove them, select them and click "remove".	
				are one chart by usin		
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IDS	5 - Pers	onal - Mitarbeiter	(akth 🗢			
Sear	rch wor	ď		Category		
-						
	ut data					
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	1	Employee	Dohle Hannah			
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		Employee Employee				
	3	Employee Employee Employee	Eilers Hans			
	3	Employee Employee Employee	Eilers Hans Franke Heiner			
	34	Employee Employee Employee Employee	Eilers Hans Franke Heiner Jahnke Kevin			
	3 4 5 6	Employee Employee Employee Employee Employee	Eilers Hans Franke Heiner Jahnke Kevin Jansen Heidi			
	3 4 5 6 7	Employee Employee Employee Employee Employee Employee	Eilers Hans Franke Heiner Jahnke Kevin Jansen Heidi Klatt Maria			
	3 4 5 6 7 8	Employee Employee Employee Employee Employee Employee Employee Employee	Eilers Hans Franke Heiner Jahnke Kevin Jansen Heidi Klatt Maria Klausen Fritz			
	3 4 5 6 7 8 9	Employee Employee Employee Employee Employee Employee Employee Employee Employee	Eilers Hans Franke Heiner Jahnke Kevin Jansen Heidi Klatt Maria Klausen Fritz Maier Gabi			

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 evals	a7	D \$1
	Document - Edit - View -	
nputData Paran	Format Results	
Please enter further	ria here and select one of the charts in menu on top (right)	
Administrator		
Results per person		
Cost center		
cost certes	Image:	
Category project	E 🕘 - Description	
	✓	
External project	C Osciption	
Production effort	Oescription	
rioudcourt circit		
Period		
ScaleMax	Pa	
DisplayCapacity	% 2	
RelevantProjectActiv	E Q+ Description	
UpperLimit	100 %	
LowerLimit	80 %	
ProjectUtilization	a contraction of the second	
HideJobDetall		
Show absences	Ter contract of the second sec	
UseProjectProbabilit	ia di seconda di second	
ShowTitle	Z	
TeamMembersDetai		
NormalizedToPercer		
ImageOnlyWithAbst		
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:

