Monthly Project Time Entry

With **Monthly Project Time Entry**, you distribute your working time for an entire month across projects. You do not enter individual bookings with date and time, but only which share of the month is attributable to which project – in percent or in hours:minutes.

Monthly entry is suitable if you do not have to document your project times day by day. For project times by the day, use Recording project times after the fact[1] or live booking via the "stopwatch function"[2]. For a given month, only one of the two types is possible: either monthly or day by day.

Access and Prerequisites

- In the standard menu, you will find the function under **My Project Times** > **Monthly Project Time Entry**. Depending on the configuration, the menu item may be located elsewhere or be named differently.
- The function is only available if your Webdesk has licensed the Project Time Tracking module with monthly project time entry and you have been granted permission for this menu item.
- You can select months from up to five years in the past up to the next month. When opened, the current month is displayed.

The Screen at a Glance

At the top you will find the month selection and the buttons **Save**, **Reset** and **Distribute evenly**. Below that is the table of projects with the following columns:

Column	Meaning
Code	Code of the project; in the last, empty row you select a further project here using the [...] button.
Name	Name of the project
(Slider)	Share of the project, adjustable with the mouse
Percent	Share of the project in percent (with one decimal place)
Hours:Minutes	Share of the project as time

At the end of each row, you remove a project with the delete button. The totals are displayed below the **Percent** and **Hours:Minutes** columns. If the time total does not match the working time of the month, it is highlighted and the working time to be distributed is additionally displayed.

Which Time Is Distributed?

Your working time (actual time) of the selected month is distributed. If project time tracking is connected to Time & Attendance, this time is taken over from Time & Attendance; depending on the configuration, from a monthly account or as the sum of the daily actual times. Without a connection to Time & Attendance, a value stored for the month is used.

The percentage shares are saved. The hours and minutes are calculated from them and from the working time of the month and rounded to whole minutes; a rounding difference is added to the largest share. If the working time of an already recorded month changes afterwards (e.g., due to a correction), the hours are automatically recalculated, depending on the configuration, based on the saved percentage shares.

Recording a Month

1. At the top, select the desired **month** and **year**. Projects of the month that have already been saved are displayed.
2. Add projects: In the empty row under **Code**, click the [...] button and select the project in the selection dialog. Alternatively, select a project from your **favorites**; via **Edit favorites** you can maintain your favorites list. After each selection, a new, empty row appears again. Each project can appear only once per month.
3. Enter the shares – either in the **Percent** column, in the **Hours:Minutes** column, or via the slider. The other values of the row are calculated automatically. You can also change values up and down with the arrow keys. When you use the slider, the shares of the other projects are adjusted so that the total remains 100%.
4. With **Distribute evenly**, the working time is distributed in equal parts across all selected projects.
5. Click **Save**. After saving successfully, the message "Monthly efforts saved successfully" appears.

As long as unsaved changes exist, no other month can be selected. Save first or discard the changes with **Reset**. After a confirmation prompt, the last saved values are then displayed again.

Rules and Notes

The distribution must add up to **100%** or the total working time of the month. The **Save** button is only active when changes exist and the percentage total is 100. The following notes are displayed below the table:

- **"The sum of the percentages should be 100."** or **"The amount in minutes should be … minutes!"** – in each case with a note on how much should still be added or subtracted. Via the links **"Fix it by assigning the percentages"** or **"Fix it by assigning the time values"**, the entered values are scaled up or down in the existing ratio so that the total is correct.
- **"Please enter the project times."** – projects were selected, but no shares have been entered yet.
- **"The project … is not selected."** – a share was entered in a row, but no project was selected via the [...] button.

For the following months, no monthly entry is possible; instead of the table, a message is displayed:

- **Months with daily project times:** "Recording not permitted for this period because daily efforts have already been recorded!"
- **Months that have already been approved:** "The efforts of this month have already been approved and can therefore no longer be changed." This applies as soon as even a single effort of the month has been approved.

Changing and Deleting

- To change a saved distribution, select the month again, adjust the shares, add or remove projects, and save. Projects that you have removed are deleted from the month when saving.
- To delete the monthly entry of a month completely, remove all projects and save. Afterwards the month can be recorded day by day again.
- Approved months can no longer be changed or deleted.

Interaction with Daily Recording and the Stopwatch

- As soon as a monthly project time entry is saved for a month, day-by-day recording is locked for that month. In recording after the fact[3], the notice "There is a monthly project time entry for the displayed time range, therefore day-by-day recording is locked." (or "… for parts of the displayed time range …") then appears.

- With the stopwatch function[4], the Start button is deactivated in the current month if a monthly entry exists for this month (when connected to Time & Attendance). Daily project times cannot be saved in such a month at all.
- Conversely, monthly entry is not possible as soon as even a daily project time is recorded in the month. To switch from daily to monthly recording, the daily project times of the month must first be removed.

Approval

Depending on the configuration, project times are approved or cleared by an authorized person. If an effort of the month has been approved, the monthly entry of that month can no longer be changed (see above).

Evaluations

Project times recorded monthly are included in the evaluations like other project times, e.g., under Evaluating recorded project times[5]. They are assigned to the month as a whole and are recorded with the first of the month as the date. When evaluating, therefore, choose a period that includes the first day of the month.

1. /daisy/webdesk-manual-admin/8579-dsy.html?language=4
2. /daisy/webdesk-manual-admin/8578-dsy.html?language=4
3. /daisy/webdesk-manual-admin/8579-dsy.html?language=4
4. /daisy/webdesk-manual-admin/8578-dsy.html?language=4
5. /daisy/webdesk-manual-admin/8580-dsy.html?language=4