How To: Configuring Project Structures

To use **project time tracking** in Webdesk EWP efficiently, the **appropriate project structures** and their **bookable projects** must be created first.

The following **list** shows, step by step, the required actions for the **new configuration** of project time management. Click a **link** to go directly to the corresponding chapter with extensive **descriptions** and **instructions** for the respective **organizational element** and its **functions**.

1) Define element types[1]
2) Define activities[2]
3) Create project structures[3]
4) Create a new project[4]
5) Overview of cost centers (optional)[5]
6) Create cost objects (optional)[6]
7) Create customers (optional)[7]

1) Element Types

As a first step, so-called **element types** must be created in the system. The element type is a kind of **definition** and describes what **type of project** it is. In addition, a **symbol** must be created for each element type. When a new project is added, you must select which element type the project is. **Examples** of element types are "work package", "main project", "project phase", or "subproject".

As an **administrator**, you can access the element types via the **menu tree** under:

MODULES
--> Project Time Tracking
--> Element Types

By clicking **"Create element type"**, new element types can be defined. The **following fields** must be filled in:

Name	Name of the new element type. Ideally, it should help to divide projects into different classes.
Up to level	Here you can set **up to which (sub)level** within the **project hierarchy** a certain element type can be defined. If, for example, "2" is selected here, a project belonging to this element type can be placed at most 2 hierarchy levels below the top level, e.g., main project (0) --> subproject (1) --> **example project (2)**, but not main project (0) --> subproject (1) --> phase project (2) --> **example project (3)**
Image set	Selection of the **collection of icons** that should be available
Image	Enter the **file path of the image** that is to serve as the symbol for the newly created element type

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If you are not sure how to **select an image**, click the small icon in the **lower left corner** of the interaction area. A selection of all symbols of the selected image set follows:

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- Move the mouse pointer over the desired symbol - with a **right-click** and then a click on **"Copy image address"**, the image address lands in your clipboard.
- Close the image set and **copy** the image address into the "Image" field. Delete the entire text up to the last two slashes (e.g.: "/actions/penguin.png").
- Clicking **"Save"** saves the new element type including the symbol.

2) Activities

In this step, the **activities** should be defined. These are various **freely selectable activity descriptions** that are assigned to specific projects and can be booked to **specify** the activity within a project (e.g., administration, installation, planning, documentation). In addition, an **activity** in the project (e.g., programming) can be **restricted to** employees of one or more specific **Webdesk groups**.

As an **administrator**, you can access the activities via the **menu tree** under:

MODULES
--> Project Time Tracking
--> Activities

The **data table** contains an overview of all activities that have already been defined. To add a new activity, click the **"Create activity**" button. The **following fields** can be filled in:

Short name	Short name of the new activity, e.g., "MAR" for "Marketing actions"
Name	Name of the activity that can be booked within a project in the future
Description	Short description of the activity, closer definition
Valid from	Date from which the new activity is to be available for booking in the project (usually the current day)
Valid until	Date until which the new activity is to be available for booking in the project (expiration date)

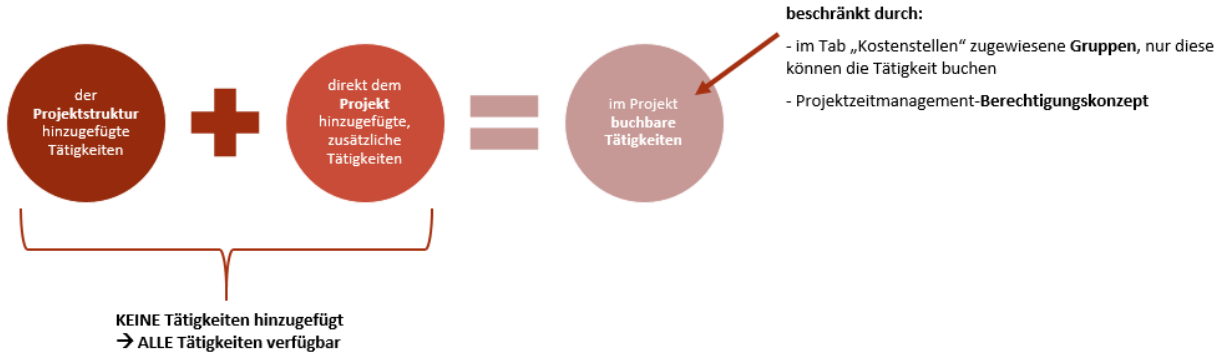
Clicking **"Save"** or **"Save and close"** saves the newly created activity in the system.

Behavior of Activities

Activities can be added as bookable to **project structures** (tab "Structures") or to individual **projects** (tab "Projects"). In addition, an activity can be **restricted** to individual Webdesk groups via the "Cost Centers" tab.

The final **availability of activities** in the booking mask of a project follows this **logic**:

- If **not a single** activity is assigned to either the project or its associated project structure, **ALL activities defined under "Activities"** are available for booking in the project.
- If individual activities are added to a **project structure**, not all activities, but **only the activities added to the structure**, can be booked for projects within the structure.
- If activities that have not already been added to the project structure are assigned **directly** to an individual **project**, they can be booked **additionally** in this project, but not in other projects of the structure.



The following **tabs** are available for **assigning and restricting** activities:

Tab "Structures"
Here the newly created activity can be assigned directly to a project structure. This activity is then available for booking to all projects contained in the structure.

Tab "Projects"
Here the newly created activity can also be assigned directly to an individual, already existing project in which it can then be booked as an activity.

Tab "Cost Centers"
If a specific group is selected in the list here and added, the corresponding activity can only be booked within a project by members of this group(s). If nothing is selected, there are no group-specific restrictions.

3) Project Structures

Every bookable project **must be part of a project structure**. These structures are mostly organized by the overarching purpose of the projects they contain (e.g., internal projects, customer projects, product development). Within this structure, projects can be organized as main projects or subprojects.

As an **administrator**, you can access the project structures via the **menu tree** under:

MODULES
--> Project Time Tracking
--> Structures

The **data table** contains an overview of all project structures that have already been set up. Clicking the **"New structure"** button lets you create a new project structure. The **following fields** must be filled in:

Client	Selection of the client to which the new project structure is to be assigned
Name	Name of the new project structure, e.g., "Internal", "Customer projects", "Unproductive"
Description	Short description, e.g., context or purpose of the new project structure
Use all element types	If this **checkbox** is activated, all already defined element types are released for projects within the structure
Unproductive	If this **checkbox** is activated, all projects within the structure are marked as "unproductive". These properties can be used as filter options in reports as well as in the project time tracking function at the Webdesk kiosk.

Tab "Elements"

At least one already defined element type must be added to the project structure here. If a new project is now added to the structure, exactly one element type from this list must be selected as the type for the new project. Under the **"Up to level"** heading you can set up to which (sub)level within the project hierarchy a certain element type can be defined:

Example:
The element type "Main project" is added with the setting "up to level 2" --> this means that a project of the type "Main project" can only be at level 0, 1, or 2 in the project hierarchy, i.e., at most a sub-subproject, but not deeper.

Tab "Activities"
Already defined activities can be added to the project structure here. The activities added to a project structure are available for booking to all projects within the structure. It is therefore usually more sensible and time-saving to add activities to entire project structures and not to each project individually.

Tab "Projects"

The data table contains an overview of all projects that are part of the selected structure. If the structure has just been created, this list is logically empty.

4) Projects

As the **most important object** and **central bookable medium** in project time tracking, **projects** should of course also be created. Once project structures and secondary elements such as activities and element types have been defined, project time tracking can begin immediately as soon as a project is created.
As an **administrator**, you can access the projects via the **menu tree** under:

MODULES
--> Project Time Tracking
--> Projects
The **data table** contains an **overview of all projects that have already been created**. By clicking the



button, they can be selected and **edited** afterwards. Clicking the **"New project"** button creates a new project. The **following fields** can be filled in:

Name	Full name of the desired new project
Short name	Desired short name of the project, appears in various overviews
Code	Project code, e.g., analogous to the work breakdown structure code in project management
Type	Selection of the element type for the new project; all element types added to the project structure are available for selection
Structure	Selection of the project structure to which the project is to be assigned
Parent project	Here a parent project can be selected directly - the new project can thus be defined as a subproject of an existing project
Bookable ...	Here you select whether time can be booked to this project in principle.

... to all customers	Here you select whether this project can be booked to all available customers, or only to those predefined in the project
Billable	Here you select whether the project involves services that are billable to the customer
... default	If this checkbox is activated, the project is automatically marked as billable. However, this can be deactivated again directly in the booking mask.
Logo	Option to upload and select a logo for the new project
Planned hours for	Here the planned time expenditure can be defined, either for this project only or for this project including its subprojects
Description	Detailed description of the project, its contents, goals, etc.

Tab "Subprojects"
Here you will find an overview and comparison of the planned and actual time expenditure for this project including all its subprojects.

Tab "Permissions"
Information and settings on booking and editing permissions for the project (for more, see Permission Management[8])

Tab "Activity"
Already defined activities can be added directly to the new project here. In the project, all activities can be booked that have been added either directly to the **project** or to the associated **project structure**.

Tab "Customers"
Previously defined customers (e.g., as clients) can be assigned to the project here. This makes particular sense for billing or for regular customers and enables additional information in evaluations.

Tab "Cost Objects"
Here you can specify that time expenditure booked in the project is assigned to a previously defined cost object, for example a specific product. The cost object itself can in turn be part of a cost center in Webdesk.

- **Static** (with % value): fixed (percentage) distribution of time expenditure to selected cost objects
- **Dynamic:** Automatic determination of the cost object via the assigned home cost center (group) of the booking person

Tab "Attributes"
Here you will find an individually configurable selection of text fields, which can contain further information about the project and its properties. The name and number of text fields to be filled in can be defined in the system parameters (see here). For example, a field "Meeting" can be defined there. This field is then visible in every project under the "Attributes" tab and can be filled with free text, e.g., "Project meeting daily at 2:45 PM".

Tab "Kiosk"
This tab is intended for adding one of the Webdesk kiosk devices (terminal solution for project time tracking) that are currently under development.

5) Cost Centers

The cost centers shown here are taken directly from the cost centers added as **groups** in the **"Portal & Organization"** section and are identical to them. Under **MODULES --> Project Time Tracking --> Cost Centers** you will only find an **overview** of all cost centers registered in the system.

6) Cost Objects

Optionally, **cost objects** (e.g., products) linked to cost centers can also be created and **assigned to a specific project**. As an administrator, you can reach the **overview** of all defined cost objects via the **menu tree** under:

MODULES
--> Project Time Tracking
--> Cost Objects

Use the **"Create cost object"** button to add a new cost object. The **following fields** can be filled in:

Name	Name of the new cost object (e.g., "Product B", for development costs)
Foreign key	Option to enter a reference key in order to transfer time expenditure for cost objects to an ERP system via an interface
Description	Option for a short description or definition of the new cost object
Cost center	Assignment of the new cost object to an already existing cost center

Clicking **"Save (and close)"** saves the newly created cost object in the system. If you now want to **assign a project** to this cost object, this works via the menu item **"Projects[9]".** After selecting a project from the overview, it can be assigned entirely or partially to a cost object in the **"Cost Objects"** tab.

7) Customers

Another option is to create **customers** and **assign them to specific projects**. This makes particular sense for large customers who are involved in several projects. The **evaluation and reporting tools** of project time tracking can thus also provide information for **customer care and support**.

As an administrator, you reach the **overview** of all customers already added via the **menu tree** under:

MODULES
--> Project Time Tracking
--> Customers

By clicking the **"Create customer"** button, a new customer can be added. The **following fields** can be filled in:

Client	Select the client to whose project the customer belongs
Short name	Abbreviation of the customer name for display in space-limited views
Name	Name of the customer to be created
Type	Selection of the customer type: external (outside companies, "classic" customers) or internal (e.g., services for company-internal departments)

Description	Short description of the customer, important notes, etc.

Tab "General"
Important **contact and address information** of the customer can be entered and saved here.

Tab "Projects"
Here you will find an **overview** of all projects that are currently being carried out for / assigned to this customer. Via the **"Add customer to project"** button, a new project can be assigned directly to the selected customer. Alternatively, a previously created customer can also be added to the respectively selected project in the menu item **"Projects[10]"** under the **"Customers"** tab.

1. /daisy/webdesk-manual-admin/8102-dsy.html?language=4