Evaluate Project Time Recordings

In **Webdesk EWP**, project times can be clearly evaluated and compared by various criteria such as **time, project, customer**, or **billability**.

The basis for this is the configurable action **"ptm_getOrgProjectEfforts"**, which, depending on the configuration and permissions, can deliver project time evaluations for individual persons, groups, project structures, or clients.
The **configured action** can be given any name (e.g., "My project efforts") and, after setup, added as an item to the **menu tree** in order to access tailored project reports at any time. The results can also be integrated into various **reports** and converted into **PDF** and **Microsoft Excel** formats.

Obtaining Evaluations

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The following instructions for evaluating project times are based on an example configuration of the action **"ptm_getOrgProjectEfforts"**. Depending on your own configuration, the view and the availability of options may differ. Further instructions on the **configuration** of the Webdesk project time evaluation action can be found **here**[1]**.**

To obtain evaluations, select your configuration of the action **"ptm_getOrgProjectEfforts"** in the menu tree (the name is self-chosen, e.g., "Project effort reports", "My project times", or "Project reports"). A mask appears with various options for filtering the evaluation:

From	Date (period) from which project efforts are to be considered in the evaluation
To	Date (period) until which project efforts are to be considered in the evaluation
Structure	Selection of the project structure whose project efforts are to be evaluated. If nothing is selected here, all structures are considered
Project	Selection of the project whose efforts are to be evaluated. If nothing is selected here, all projects are considered.
Customer	Selection of a customer whose project time efforts are to be considered in the evaluation. If nothing is selected here, no filtering by customer takes place.
View variant	Selection of the report variant (how/which data should be displayed?). By default, 6 report variants are available; more can be configured here[2].
Description	More detailed description of the selected view variant
Select billability	Selection of whether only billable, only non-billable, or all project times are to be considered
With subprojects	Yes/No selection of whether subprojects are to be displayed broken down separately
Show project hierarchy	Selection of whether evaluated project times are to be displayed hierarchically in the context of the project structures

Show individual bookings	Yes/No selection of whether each individual project time booking is displayed separately as a row or not
With historization	Yes/No selection of whether historical project time efforts (e.g., after a group change) are also included in the evaluation. **Example:** The employee Rudi Renner switched from the department (group) "Development" to the group "Sales" in June of last year. If "Yes" is selected for historization, Rudi's production efforts from the group "Development" (Jan.-Jun.) and from the group "Sales" (Jun.-Dec.) are displayed in the annual evaluation. If "No" is selected, only the project time efforts from the employee's current group (in Rudi's case "Sales") are evaluated.
Alternative report title	Option to select an alternative title to be displayed in the report (and in the export views) instead of the action name
Output format	Selection of the output format: print view, PDF, or Microsoft Excel. If this field is left empty, the output is shown on screen
Selection tree	Selection of the groups whose project times are included in the evaluation: • **Groups with view permission:** shows project times of all groups the user is permitted to view • **All groups:** shows project times of all groups of the client, even if the user has no view permission
Search	Here the project time evaluation can be filtered once more by specific persons or groups. The word entered must match at least part of the first or last name of a person or the short name/name of a group.
Consider selection in search	Yes/No checkbox: When searching for persons or groups, should the filter criteria entered above (structure, project, customer, etc.) also take effect?

View Variants

In principle, two view variants are preconfigured in the standard action for project time evaluation, which are sufficient for the usual overviews and areas of application:

- **Sorted by booking element**
  Alphabetical sorting of the booked **projects** with the project as the top level (**hierarchy**: project > year > month > group > employee)
- **Sorted by date**
  The project time efforts are displayed in a **time series** with the year as the top level (**hierarchy**: year > month > week > date > group > employee

Tree/Favorites Selection of Groups

Here you have the option to select the **groups** to be considered in the project time evaluation directly from the **organization chart** by clicking. **Individual favorites** can also be defined as a filter template.

- **Organization chart**
  - All folders marked with a plus (+) symbol can be **expanded** further to show the subunits.
  - Clicking checks the unit in question. A **double-click** automatically checks all subunits as well
  - Clicking the green arrow > **Show subgroups to depth (depth 1-3)** > displays all existing subgroups
  - Using the blue arrow > **Collapse tree** > this view is minimized again, so that only the parent groups appear
  - Show details > clicking the **symbol**

    displays the selected groups clearly in a **list** to the right of the symbol. Clicking again hides the detailed information.
  - Clicking the **Query button** starts the search.
- **Favorites**
  Once you have switched to the **Favorites view** (see screenshot), clicking **"Add"**

  lets you create both groups and persons as a **quick selection** for filtering the evaluation. If you now check the **checkbox** for groups and/or persons and click the **Query button**, these saved filter criteria are applied in the evaluation.

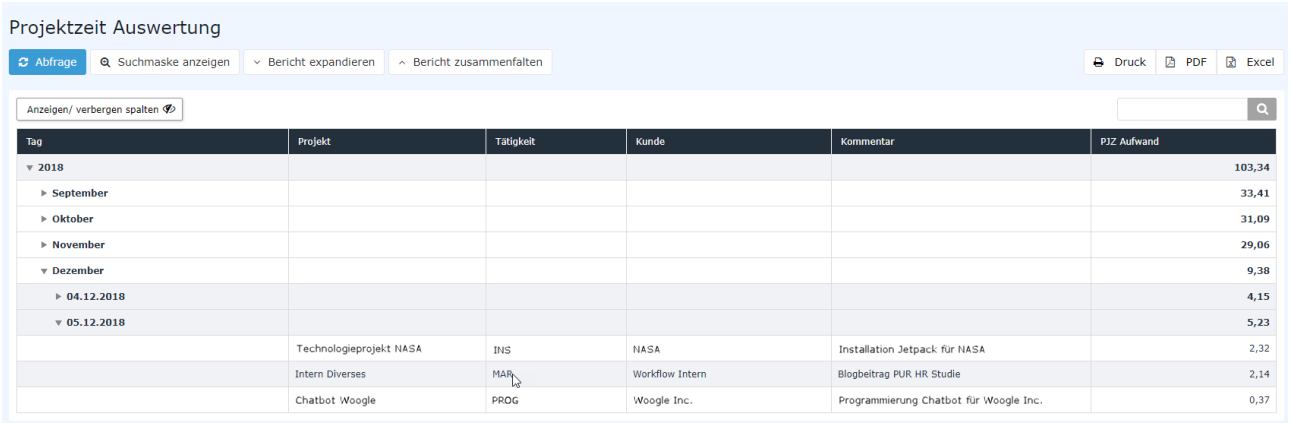
Viewing Evaluations

If you have chosen the **screen view** of the evaluation (nothing was selected in the "Output format" field), the evaluation is displayed as a **collapse element**. Depending on the selected **view variant**, the data is structured differently (e.g., primarily by date, by project, by person).

- Using the small **arrows**, entries can be individually **expanded and collapsed**
- The **"Expand report"** button expands the entire report including all sub-elements
- Via **"Collapse report"** it is reduced again to the highest-ranking level(s)
- With the **"Show/hide columns"** button, individual **information columns** in the table can be **shown or hidden**

Via the **export buttons** (print, PDF, Excel) at the top left, the report can also be exported afterward to **other formats**.

The following screenshot shows an example of a project time evaluation in the chronological view variant as a time series.



Tag	Projekt	Tätigkeit	Kunde	Kommentar	PJZ Aufwand
▼ 2018					103,34
▸ September					33,41
▸ Oktober					31,09
▸ November					29,06
▼ Dezember					9,38
▸ 04.12.2018					4,15
▼ 05.12.2018					5,23
	Technologieprojekt NASA	INS	NASA	Installation Jetpack für NASA	2,32
	Intern Diverses	MAR	Workflow Intern	Blogbeitrag PUR HR Studie	2,14
	Chatbot Woogle	PROG	Woogle Inc.	Programmierung Chatbot für Woogle Inc.	0,37

1. /daisy/webdesk-manual-admin/8045-dsy.html?language=4
2. /daisy/webdesk-manual-admin/8045-dsy.html?language=4