Configure Project Time Evaluations

In **Webdesk EWP**, all project time evaluations are based on the configurable action **"ptm_getOrgProjectEfforts"**.

The following instructions describe how to configure this action and adapt it to your personal needs for **project time evaluation**. Examples of **customizability** include the number and properties of the available view variants and filter options of the evaluation, or the individual layout of the generated report.

1) Create a New Configuration of an Action

As an administrator, you open the action overview via the **menu tree**:

Menu and Actions
--> Actions

An **overview** of all **actions, configurations, and process references** stored in the system appears. In the first column, select "Action" as the action type and enter the name of the desired action in the search field in the second column, in this case **"ptm_getOrgProjectEfforts".** Press Enter to filter the list, and the base action **"ptm_getOrgProjectEfforts"** (Report on project efforts) appears.

Clicking **"New configuration"** in the corresponding column creates a new configuration of the action, which can then be personalized. Alternatively, a new configuration can also be created in the action overview via the "New configuration" button by specifying the base action (here "ptm_getOrgProjectEfforts"). In both cases, two **names** must be specified first:

- **Name:** unique name of the new configuration, ideally with a module description (e.g., "ptm_MyProjecttimeReport")
- **Heading:** descriptive name of the new configuration, which also appears in the menu tree (e.g., "My project time evaluation")

After clicking **"Save"**, the new configuration is saved and numerous further **options** appear:

Tab "Settings"

Description	More detailed description of the action configuration and its functions
Action folder	Assignment of the action folder in which the new configuration can be found in the overview. Normally this is the same action folder as that of the parent action (default value)
Menu icon	Selection of the icon with which the configured action is displayed in the menu tree
Menu icon for classic view	Selection of the icon with which the configured action is displayed in the menu tree of the Classic skin
Overwrite action metadata on software update	If "Yes" is selected here, the personal settings for the configuration are overwritten during a software update and the default values are restored
Pass permission on to the following action	Here another action can be specified for which the same permissions apply as for the action currently being edited

Default roles	Here there is an overview of the roles that automatically receive a permission to execute the newly configured action
Unsupported viewports	By checking the corresponding box, access to the newly configured action can be blocked for certain platforms (mobile, tablet, or desktop)
EDIT CONFIGURATION DETAILS	Clicking this button takes you to the actual settings for personalizing and configuring the new action. These configuration options are described and explained in detail further down on this page --> *Jump straight to the configuration details*[1]
Always open in new window	If this checkbox is checked, the new action is always opened in a new browser window when called
Is experimental	Here the new configuration can be marked with the "experimental" attribute
Prevent execution for switched users	If this checkbox is activated, the action can only be executed by the user themselves and not by administrators who have switched to this user
Number of users (max. licensed)	This shows how many users are currently permitted to use this action. Below it, a limit is displayed for how many users the corresponding Webdesk license is valid

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The options **"Use the following template"**, **"Controller"**, and **"Controller pattern"** are **advanced developer options** that should only be used in consultation with Workflow Systems GmbH. For further information, please contact us directly.

2) Edit Configuration Details

As mentioned at the beginning, every project time evaluation is based on the action **"ptm_getOrgProjectEfforts"**. After a new configuration of this action was created in the first chapter on this page, this chapter is devoted to the actual **configuration**, i.e., adapting the new function to your needs. Clicking the **"Edit configuration details"** button in the **"Settings"** tab takes you to a new page where, among other things, filter options can be shown and hidden, new **report templates** and layouts can be created, or the general **appearance** when calling the action can be changed.

The configuration options are divided into the following **categories**:

General Settings

These are settings that affect the newly configured action and its capabilities as a whole:

Applied permissions	Here you decide which **user permissions** are to be applied to the projects/persons that can be displayed in the evaluation: **View permissions -** *Restriction by person only* If **"View permissions"** is selected, all project times of persons are available that fall under the **"View permission" column** in the action permission. If,

	for example, "own org unit" is selected for the role "Supervisor", a user in the role of supervisor can display and evaluate all project times of their own organizational unit. There are no restrictions on the projects that can be evaluated, only on the persons. **Project permissions** - *Restriction by project and person* If **"Project permissions"** is selected, only those project times are available for evaluation that the user is authorized to view, edit, or book according to the **"Permissions" tab** in the **project list**[2]. Only projects for which a permission has been explicitly granted can be evaluated. The persons that can be evaluated within these projects are determined by the view permission for the action. If, for example, project manager Rudi Renner is directly granted a booking/reporting permission when the new project "Advertising campaign" is created, he can evaluate the project times of this project for persons according to his view permission in the action.
Do not show standard reports	If this checkbox is activated, the two standard reports "sorted by booking element" and "sorted by date" are not displayed in the list of possible view variants
Standard report	Select which report is to be displayed by default in the dropdown list (sorted by date, sorted by booking element, user reports)
Label for uncategorized column	If empty columns result in the grouping columns of the report due to inconsistencies in the hierarchy, an alternative label for these empty columns can be specified here
Omit 0.00 in time and attendance	Yes/No selection of whether, in reports that make a comparison with attendance times, an attendance time of 0 hours is to be displayed as ***0.00*** or hidden.
Show billability selection	Yes/No selection of whether the evaluation query should allow filtering by **billable** and **non-billable** projects. If "No" is selected here, all projects are displayed by default.
Show historization selection	Yes/No selection of whether the evaluation query should show the option to activate/deactivate **historization** in the evaluation. If "No" is selected here, historization is not applied by default.
Display time as	Selection of whether time efforts in the project time evaluation are to be displayed by default in standard minutes (45 minutes corresponds to 0.45) or in industrial minutes (45 minutes corresponds to 0.75).

Settings for Standard Reports

These are settings that affect the standard reports preconfigured in the system and, if permitted under "General settings", available in every evaluation. For some of the selection lists, besides "Yes" and "No" you can also select the option "System value". In this case, the default settings saved in the system parameters are used:

Show comparison to time tracking	If "Yes" is selected here (or the system value says "Yes"), the standard reports show a comparison to the attendance time for the day in question in separate columns, and the difference is calculated. More information on the comparison of project time/ attendance time **here (Link!!)**
Show customer	If "Yes" is selected here (or the system value says "Yes"), the standard reports show the customer of a project, if available, in a separate column.
Show activity	If "Yes" is selected here (or the system value says "Yes"), the standard reports show the activity within the project in a separate column for each row
Show from/to times	If "Yes" is selected here (or the system value says "Yes"), the standard reports show the start and end time for each row in addition to the project time effort in hours.
Show "Billable" option	If "Yes" is selected here (or the system value says "Yes"), the standard reports show in an additional column in the evaluation whether the booked project effort is billable.
Show week column	Yes/No selection of whether, when expanding the standard report "sorted by date", the expansion should proceed by year > month > week > day or, without week, only by year > month > day
Add industrial minutes to xls	Yes/No selection of whether, for output in Microsoft Excel format, a separate column with project and attendance times in industrial minutes should be displayed.

Designing Custom Project Reports

In addition to the two available **standard reports**, the administrator can create several **custom reports for each configuration** of the project time evaluation action. Every person in Webdesk who has access to the configured action can then use these reports and evaluate data in their format. Reports can be created easily and quickly using the **modular system**:

In the **"Report definitions"** section, first click the **"Add"** button to create a new custom report. An **input row** opens with various options:

1) General Data and Description

- **Report name:** enter the name of the new report here (e.g., "Customer report" or "Time series with project status")
- **Report ID:** Enter a short name or a code for the new report here (e.g., "CustomReport2")

- **Report title (optional):** here you can specify the title that is displayed at the top of the page when output in PDF or Microsoft Excel format
- **Description:** more detailed description of the layout, structure, and information displayed that this report offers
- **Row count:** If this checkbox is activated, the **first column** in the report always contains information about the number of rows that are displayed when the group (collapse element) is fully expanded.
- **Management report:** If project permissions are selected under "Applied permissions" and this checkbox is activated, all projects for which the user has a view permission ("Reporting") in the project overview are evaluated. However, if view permissions are selected under "Applied permissions", this checkbox has no effect.

2) Grouping Columns

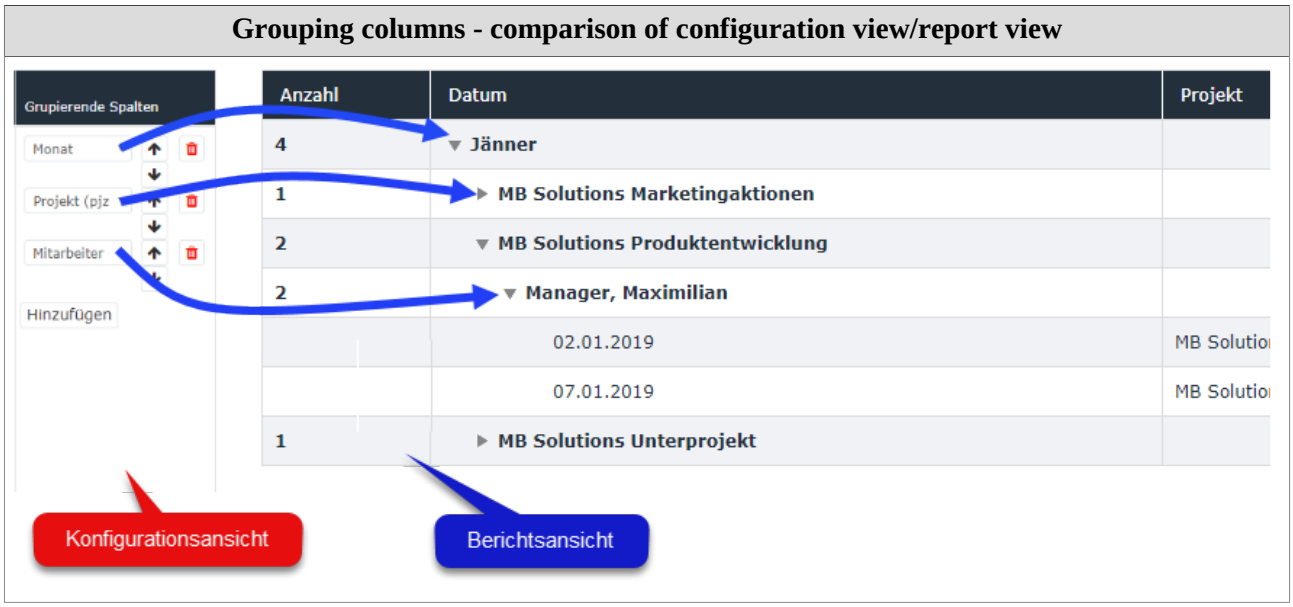
The information selected here is used to determine the expandable and collapsible **hierarchy of the report**. Clicking "Add" lets you select from the list the data with which the collapse element is to be built.

If, for example, "Month" is the first grouping column, all project times are first displayed and **sorted** by month. If you expand the month column, the project times within the month are sorted by the **second grouping column** (in this case "Project"). If you expand this column as well, the display is by the third grouping column (in this case "Employee"), and so on...

Once you reach the deepest level (here "Employee" expanded), the project times are displayed with the further information previously selected under "Detail columns" in the columns. With the **arrow keys** for up/down, the **order/hierarchy level** of the grouping columns can be moved.

More information on the meaning and function of the options for grouping columns[3]

Grouping columns - comparison of configuration view/report view

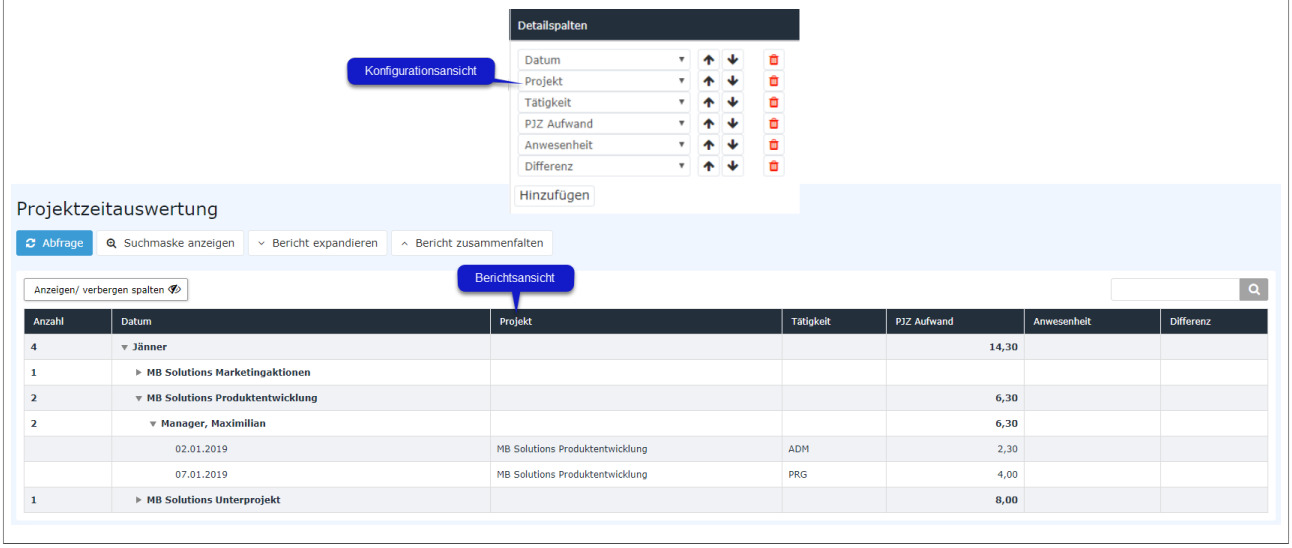


3) Detail Columns

Clicking the **"Add"** button lets you **select the information** for the so-called **detail columns**. When the **report is fully expanded**, the information selected here is displayed in detail for the individual project bookings in the **table columns**. The **order** of the detail columns can also be **moved with the arrow keys**; they are displayed in the report from **left to right**.

More information on the meaning and function of the individual options for detail columns[4]

Detail columns - comparison of configuration view/report view



3) Moving and Deleting

In the **"Up/Down" column**, the defined reports can be **moved** down or up as a whole using the arrow keys. The **order** set here is the template for the order in which the reports are displayed under **"View variant"** when the action is called.

Clicking the



icon in the "Delete" column **deletes** the respective configured **report.**

Other Configuration Details

In addition to setting various parameters and defining reports, **further options** can be set for the configured action, particularly for **formatting and appearance**:

Context menu --> see here[5]

Formatting --> see here[6]

Design

Here you can specify individual **font and background colors** as well as **font size** and **style** for the various elements of the report. The following elements can be designed by the administrator:

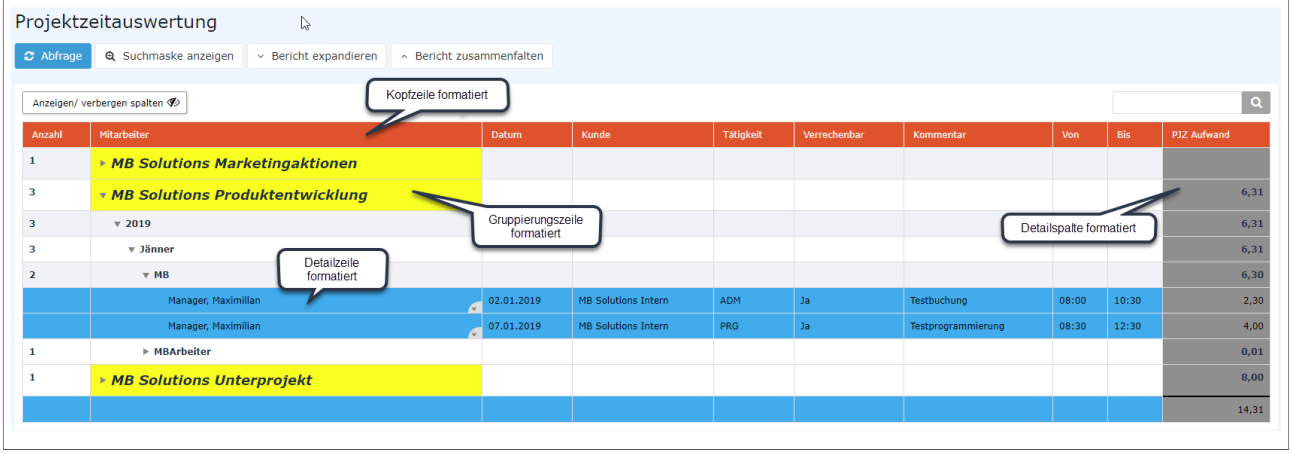
- **Header row of the report**
- **Detail row of the report** (individual project booking row)
- **Individual grouping rows** (expandable and collapsible rows in the collapse element)
- **Individual detail columns**

For **each of these elements**, the **following settings** can be specified in the respective table:

Grouping row/detail column	Only in the grouping rows/detail columns table! Selection of the grouping row or detail column for which formatting is to be specified.
Background color	Selection of the **color** with which the corresponding cells are to be **filled**. Input is possible as an HTML/

	HEX color code, RGB color code, or by color name (e.g., "yellow").
Color	Selection of the **font color for text** in the respective cells. Input is possible as an HTML/HEX color code, RGB color code, or color name.
Font style	Selection of the **style for text** in the respective cells. Available options are Normal, Bold, Italic, or Bold Italic.
Font size	Selection of the **font size for text** in the respective cells. Input is possible here in **standard sizes** (small, medium, large) or in **%, cm, px**, and **pt**.
CSS style	Here you can enter a complete **style definition** in **inline CSS format**.
Entire	Only for grouping rows/detail columns! If this checkbox is activated, the formatting selected for the grouping row is **extended to the entire row length**. If this is selected for the "Detail column" item, the formatting is applied to the **entire length of the column**, not just to the detail column of the currently opened detail row.

Example of report formatting



1. /daisy/webdesk-manual-admin/8019-dsy.html?language=4#dsy8019-dsy_Projekte
2. /daisy/webdesk-manual-admin/8138-dsy.html?language=4
3. /daisy/webdesk-manual-admin/8138-dsy.html?language=4#dsy8138-dsy_Detailspalten
4. /daisy/webdesk-manual-admin/8099-dsy.html?language=4
5. /daisy/webdesk-manual-admin/8098-dsy.html?language=4