Recording Project Time After the Fact

General

The **"Record project time"** mask gives the user the option to record project times that were not booked directly via the stopwatch (project time booking) after the fact. In addition, project times that have already been recorded can be **edited** or **deleted**.

In principle, the **logged-in user** is always automatically set as the booking person. The option to search for other persons or to **switch between persons** and to **edit** the project times entered by other persons is available only to users with administration permissions (members of a PTM admin group; for more, see Permission Management[1]).

Recording Project Time

In the **recording mask**, first select the relevant **year** or **calendar week**. By default, the **current calendar week** is always displayed. Via the **Display as** selection, you can switch between the week view (**Show as week**) and the month view (**Show as month**). With the **arrow keys** you can navigate between calendar weeks or months, or select any calendar week or month in the **dropdown list**. Once you are in the desired period, you can begin **recording project time**.

> WARNUNG
> Project time can only be recorded after the fact, not on days that lie in the future!

> NOTIZ
> Depending on the configuration, additional restrictions apply: The project times recorded for a day must not exceed the attendance time or a specified maximum number of hours per day, from and to times must lie within the attendance time, bookings for the current day can be locked, and entries of the previous month can only be recorded or changed up to a specified day of the current month. If monthly project time tracking exists for a month, daily recording is locked for that period.

In the **recording** table, the following **data** is entered and displayed:

Per project booking:

Day (fixed)	The date for which the project time is to be recorded
Project	To identify the project, the short name with the fixed prefix is displayed here; the full project name is added automatically in the field to the right
Activity	Selection of one of the predefined activities in the project
Customer	Selection of a customer, if added to the project
Description	Here you can describe in more detail how the time to be recorded was used, in order to get an even better overview of the work performed over the course of the project
From	Time at which work on the project began
To	Time at which work on the project was interrupted/ended
Time	This is the difference resulting from the From and To times - it indicates in hours how long was worked on the project. As an alternative to entering the from and to times, you can also enter just the amount of time in the "Time" field - e.g., 1.30 for 1 hour and 30 minutes
Bill.	Short for "Billable" - selection of whether the project time to be booked is billable or not

Actions	Clicking  (**Edit**) lets you **edit** project bookings that have already been made after the fact. Edited start and end times must not overlap with other project times! When in edit mode, clicking the "Save" button takes you back to the overview. - Clicking  (**Delete**) deletes the project time entry from the table. For safety, this input must be confirmed.

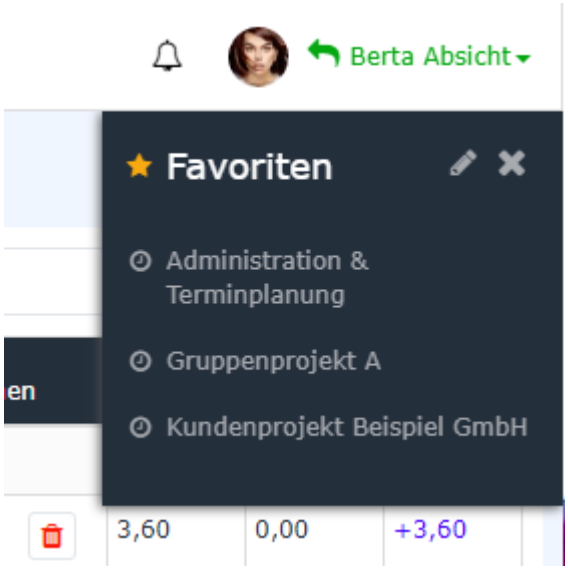
Per day:

Sum	Short for sum. Here the individually **recorded project times per day** are added up and displayed as a total
Att.	Short for attendance. Here the total **attendance time of the day in question** is displayed.
Diff.	Here the **difference** between attendance time and recorded project times is displayed. Depending on whether the attendance time exceeds the project times, falls short of them, or the values match, the result is a **negative** (red), **positive** (blue), or **0** (green) value

Favorites

At the top right of the screen is the expandable **"Favorites"** button.





In this area you can create your own **templates** for frequently booked project activities and quickly insert them into the recording mask, so that only the **start and end time** need to be entered manually. Clicking a favorite transfers its values to the currently selected row. To **add a new favorite**, click the **"Edit"** icon**.** in the expanded Favorites field. In the table now displayed, favorites that have already been added can be **edited** and new ones can be **added.**

If a new favorite is created via the **"Add new favorite"** button, a **freely selectable name** (e.g., "Daily progress meeting") must be set in the first field. Then select the desired **project**. The columns **Bookable** and **Bill.** are filled in automatically based on the saved project properties. The text written in the **Comment** field

is visible later when booking in the "Description" field in the recording mask. Optionally, **customers** and **activities** can also be saved in the favorite template.

As soon as all required fields are filled in, the **"Save"** icon appears - the new favorite is thereby saved in the system. Clicking the **"Delete"** icon deletes the row. Existing favorites can be edited by clicking the **"Edit"** button.

Row Options

Clicking the **right mouse button** opens **further options** for the user within the project overview table. The respective actions apply to the **row** in which the mouse pointer is located when clicking.

Show daily journal
A window opens with the user's daily journal for the day in question.

Copy and paste
The content of the selected row is **copied** and can be pasted into another row (on another day or on the same day) by right-clicking and choosing **Paste**. If the project time entry is copied and pasted on the same day, the **From** and **To** columns of the copy must be adjusted, since overlapping intervals are not permitted.
The duplicate can still be edited and adjusted as desired before saving. If the row was pasted incorrectly by mistake, the operation can be canceled via the **"Cancel"** button.

Add to favorites
Here a specific project booking can be added directly to the **favorites**. After clicking, a **dialog window** opens in which to name the new favorite. After confirming via the **"OK"** button, the project is added to the favorites list.

Show change history
A window opens that displays, in chronological order, all project bookings made and edited on the selected day.

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