How To: Setting up the Environment

In order to use **Project Time Recording** in Webdesk EWP efficiently, the appropriate **project structures** and their bookable **projects** must first be created.

The following list shows the actions required for a **first configuration** of project time acquisition step-by-step. Click on the **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 Projects[4]
5) overview of Cost Centers (optional)[5]
6) create Cost Objects (optional)[6]
7) create Customers (optional)[7]

1) define Element Types[8]	**2) define Activities**[9]	**3) create Project Structures**[10]	**4) create Projects**[11]

5) overview of Cost Centers (optional)[12]	*6) create Cost Objects (optional)*[13]	*7) create Customers (optional)*[14]

1) Element Types

In a first step, so-called **element types** must be created in the system. The element type is a kind of **definition** and describes the **type of project**. You must also create a **symbol** for each element type. When a new project is added, the element type of the project must be selected. **Examples** of element types can be "work package", "main project", "project phase" or "subproject".

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

MODULES
--> Project time acquisition
--> Element types

New element types can be defined by clicking on **"New element type"**. The following **fields** must be filled in:

Name	Name of the new element type. At best, this should help to distinguish projects in 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
Image-Set	choose the Image-Set availabe for setting the icon of the element type
Image	insert the **file path** of the image supposed 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 on the small icon in the **lower left corner** of the interaction area. A selection of all icons of the selected image collection follows:

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

2) Activities

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

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

MODULES
--> Project time acquisition
--> Activities

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

Shortname	Shortname of the new activity, e.g. "MAR" für "Marketing Actions"
Name	Name of the newly bookable activity
Description	short description of the new activity, closer definition
Valid from	Date from which the new activity in the project is to be available for booking (usually the current day)
Valid till	Date up to which the new activity in the project is to be available for posting (expiration date)

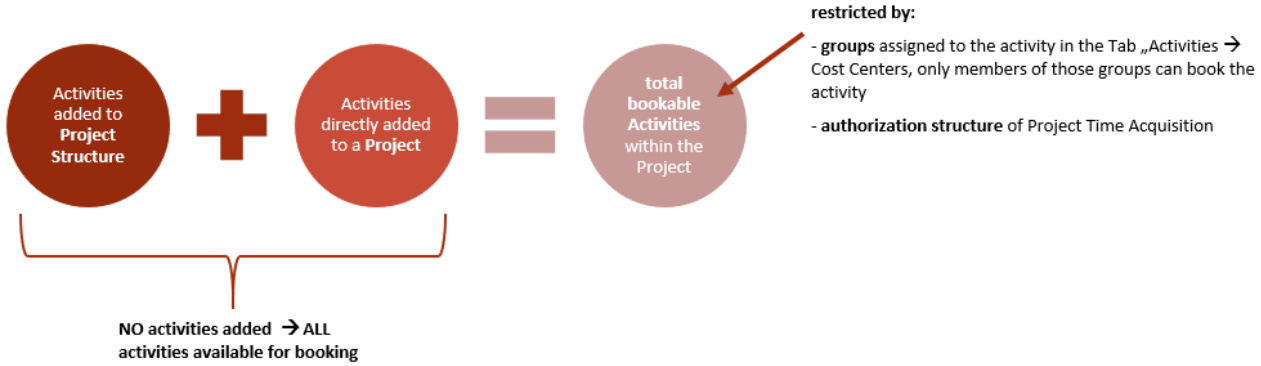
Click on **"Save"** or **"Save and close"** to save the newly created activity in the system.

Availability of Activities for booking

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

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

- If not a single activity is assigned to the project and its associated project structure, **ALL activities defined under "Activities"** are available for booking for the project.
- If individual activities are added to a **project structure**, not all activities but **all 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 **additionally** be booked 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 directly assigned 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 be directly assigned to a single, already existing project in which it can then be booked as an activity.

Tab "Cost Centers"
If a specific group is selected and added in the list, the corresponding activity can only be booked by members of this group(s) within a project. 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 usually organized according to the higher purpose of the contained projects (e.g. internal projects, customer projects, product development). Within this structure, projects can be organized **hierarchically** (define main- and sub-projects, etc...).

As an **administrator**, you can access the Project Structures via the **menu tree**:

MODULES
--> Project time acquisition
--> Structures

The **data table** contains an overview of all project structures that have already been set up. A new project structure can be created by clicking on the **"New structure"** button. Therefore, the following **fields** must be filled in:

Client	Selection of the client to which the new project structure belongs
Name	Name of the new project structure, e.g. "internal", "customer projects", "non-productive"
Description	short description, e.g. context or purpose of the new project structure
Use all element-types	If this **tickbox** is activated, all already defined element types are enabled to be picked for projects within the structure.
Unproductive	If this **tickbox** is activated, all projects within the structure are marked as "unproductive". This feature could be used in future as a filter option in reports.

	The function is also part of the Webdesk kiosk for project time recording, which is currently under development.

Tab "Elements"
Here at least one already defined element type must be added to the project structure. 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 tab "up to level" 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" in the project hierarchy can only be on level 0, 1 or 2, i.e. at most a sub-sub-project, 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 posting to all projects within the structure. Therefore, it is 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 therefore empty.

4) Projects

As the **most important object** and **central bookable medium** in project time recording, the creation of **projects** is of course essential. If project structures and secondary elements such as activities and element types have been defined, project time recording can be started as soon as a project is created.

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

MODULES
--> Project time acquisition
--> Projects

The **data table** contains an **overview of all projects that have already been created**. By clicking on the **Edit button**, these can be selected and **edited** afterwards. With a click on the button **"New project"** a new project is created - there, the following **fields** can be filled in:

Shortname	desired short name of the project, appears in various overviews
Name	full name of the newly created project
Code	project code, for example in analogy to the work breakdown structure code in project management.
Logo	option to upload and select a logo for the new project
Structure	Selection of the project structure to which the project is to be assigned
Parent project	here the direct selection of a parent project is possible - the new project can therefore be defined as a subproject of an existing project
Type	selection of the element type for the new project - all element types added to the project structure are available for selection.

Tickboxes bookable/billable	"bookable" (can you book time efforts to this project yes/no?), "billable" (are these time efforts chargeable to the customer yes/no?)
Default chargeability of efforts	if this checkbox is activated, the time effort booked to this project is marked as "billable" by default (can be deactivated again in the booking window, depending on the system settings)
Planned efforts & sums	here, you can define the planned time effort, both for the concerning project or for the 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 efforts for this project including all its subprojects.

Tab "Permissions"
Information and settings on booking and editing authorizations for the project (more on this under Authorization Management)

Tab "Activities"
Here, already defined activities can be added directly to the new project. In the project, all activities which were added either directly to the project or to the corresponding project structure can be booked.

Tab "Customers"
Here you can assign previously defined customers (e.g. clients) to the project. This makes sense especially for billing or for regular customers and enables additional information to be provided for reports and evaluations.

Tab "Cost Objects"
Here, you can define that time efforts booked in the project are assigned to a previously defined cost object, e.g. a certain product. The cost object itself can also be part of a cost center in Webdesk.

- **Static** (with % value): fixed (percental) allocation of booked project time efforts to selected cost units.
- **Dynamic**: Automatic determination of the cost object via the assigned 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 characteristics. Name and quantity of the text fields can be defined in the system parameters (see here). For example, a field "Meeting" can be defined in the system parameters. This field is now visible in every project under the tab "Attributes" and can be filled with free text, e.g. "Daily Project meeting at 14:45".

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

5) Cost Centers

The cost centers shown here are adopted from the cost centers added as groups in the **"Portal & Organization"** section and are identical to these. Under MODULE --> **Project time acquisition --> Cost centers** only an overview of all cost centers registered in the system can be found.

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 access the overview of all defined cost objects via the **menu tree**:

MODULES
--> Project time acquisition
--> Cost objects

Use the **"New 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", to track development costs)
Foreign key	Possibility to enter a reference key to transfer time efforts dedicated to cost units via interface to an ERP system
Description	Possibility to briefly describe or define the new cost object
Cost center	Assign the new cost object to an existing cost center

Click on **"Save (and close)"** to save 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"**[15]. After selecting a project from the overview, it can be **completely or partially** assigned to a cost object in the tab **"Cost Object"**.

6) Customers

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

As an administrator, you access the **overview** of all existing customers via the **menu tree**:

MODULES
--> Project time acquisition
--> Customers

By clicking on the button **"New customer"**, a new customer can be added - following **fields** can be filled:

Client	Select the client whose project the customer belongs to.
Shortname	Abbreviation of the customer name for display in space-limited views.
Name	Name of the newly created customer
Type	Selection of customer type: external (foreign companies, "classic" customers) or internal (e.g. services for internal departments)
Description	short description of the new customer, important notes, etc...

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

Tab "Projects"
Here, you will find an **overview** of all projects which are currently assigned to this customer. Via the button **"Add customer to project"** a new project can be directly assigned to the selected customer. Alternatively,

a previously created customer can be added to a selected project in the menu item **"Projects[16]"** at the tab **"Customers"**.

1. https://extranet.workflow.at/daisy/webdesk-manual-en/g3/5754-dsy/5755-dsy/8019-dsy/edit/0f46314b6136706f478358544b46336d0938326b/part-SimpleDocumentContent#Element-Typen
2. https://extranet.workflow.at/daisy/webdesk-manual-en/g3/5754-dsy/5755-dsy/8019-dsy/edit/0f46314b6136706f478358544b46336d0938326b/part-SimpleDocumentContent#T%C3%A4tigkeiten
3. https://extranet.workflow.at/daisy/webdesk-manual-en/g3/5754-dsy/5755-dsy/8019-dsy/edit/0f46314b6136706f478358544b46336d0938326b/part-SimpleDocumentContent#Structures
4. https://extranet.workflow.at/daisy/webdesk-manual-en/g3/5754-dsy/5755-dsy/8019-dsy/edit/0f46314b6136706f478358544b46336d0938326b/part-SimpleDocumentContent#Projekte
5. https://extranet.workflow.at/daisy/webdesk-manual-en/g3/5754-dsy/5755-dsy/8019-dsy/edit/0f46314b6136706f478358544b46336d0938326b/part-SimpleDocumentContent#Cost%20Objects
6. https://extranet.workflow.at/daisy/webdesk-manual-en/g3/5754-dsy/5755-dsy/8019-dsy/edit/0f46314b6136706f478358544b46336d0938326b/part-SimpleDocumentContent#Customers