Evaluate Project Time Recordings

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

The basis for this is the configurable action **"ptm_getOrgProjectEfforts"** which, depending on configuration and permissions, can provide project time evaluations for individual persons, groups, project structures or clients.

The **configured action** can be named arbitrarily (e.g. "My Project Efforts") and can be added as an item to the **menu tree** after configuration in order to access customized project reports at any time. The results can also be integrated into various **reports** and converted into **PDF** and **Microsoft Excel** formats.

Get evaluations

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

To get evaluations, select your configuration of the action **"ptm_getOrgProjectEfforts"** in the menu tree (name is chosen by yourself, 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
Till	Date (period) up to which the 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 taken into account.
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 effort is to be considered in the evaluation. If nothing is selected here, the system does not filter by customer.
Report type	Selection of the report type (how/what data should be displayed?). By default, 2 report types are available - others can be configured here.
Report description	Automatically displayed - more detailed description of the selected report type
Select billability	Select whether only billable, only non- billable, or all project times are to be taken into account.
Show sub projects	Select Yes/No if subprojects should be displayed separately
Show project hierarchy	Select whether evaluated project times are to be displayed hierarchically in the context of the project structures.

Show bookings	Select Yes/No whether each individual booking of project time is displayed separately as a line or not.
With historization	Selection Yes/No whether also historical project time expenditures (e.g. in case of group change) are included in the evaluation. **Example:** The employee Rudi Renner changed from the department (group) "Development" to the group "Sales" in June last year. If "Yes" is selected for historization, Rudi's project time 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 current group of the employee (in Rudi's case "Sales") are evaluated.
Alternative report title	Ability to select an alternative title to be displayed in the report (and export views) instead of the action name.
Output format	Selection of the output format: print version, PDF or Microsoft Excel. If this field is left empty, the output is presented on the screen.
Selection tree	Selection of the groups whose project times should be included in the evaluation: • **Groups with viewing permission:** displays project times of all groups that the user has permission to view. • **All groups:** shows the project times of all groups of the client, even if the user does not have access rights.
Search	Here, the project time evaluation can be filtered again by specific persons or groups. The search word must correspond to at least part of the first or last name of a person or the short name/name of a group.
Consider selection in search	**Tickbox Yes/No:** Should the filter criteria entered above (structure, project, customer, etc...) also take effect when searching for persons or groups?

Report types

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

- **Project sorted**
  alphabetical listing of booked **projects** with the project as top level (**hierarchy**: Project > Year > Month > Group > Employees)
- **Date sorted**
  The project time efforts are displayed in a **time line** with the year as the top level (**hierarchy**: Year > Month > Week > Date > Group > Employees

Organigram/Favorite selection of groups

Here, it is possible to select the **groups** to be considered in the project time evaluation directly from the **organigram** by clicking on them. **Individual favorites** can also be defined as filtering templates.

- **Organigram**
  - All folders, which are provided with a plus (+) symbol, can be **expanded** even further and thus show the sub-elements.
  - By clicking on a unit, it will be selected. By **double-clicking**, all sub-elements will automatically be selected.
  - by clicking on the green arrow > **Show subgroups to depth (depth 1-3)** > all existing subgroups are displayed
  - using the blue arrow > **Minimize tree** > this view is minimized again, only the parent groups seem to be on
  - Show details > By clicking the **-icon**, the selected groups are conveniently displayed in a **list** to the right of the icon. Click again to hide the detailed information.
  - Clicking the **query button** starts the search.
- **Favorites**
  If you have switched to the **favorites view** (see screenshot), you can click on **"Add"** to create both groups and persons as a **quick selection** for filtering the evaluation. If you **tick the box** for groups and/or persons and click on the **query button**, these **filter criteria** will be used in the evaluation.

View evaluations

If you have selected 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 **report type**, the data is organized differently (e.g. primarily by date, by project, by person).

- the small **arrows** can be used to **expand and collapse** entries individually
- the **"Expand report"** button expands the entire report including all sub-elements
- via **"Collapse report",** the data is reduced to the top level(s) again
- With the button **"Show/hide columns"**, individual **information columns** can be **shown or hidden** in the table.

Using the **export buttons** (Print, PDF, Excel) in the upper left corner, the report can also be exported to **other formats** afterwards.
The following screenshot shows an example of a project time evaluation in the chronological view variant (report type "Date sorted"):