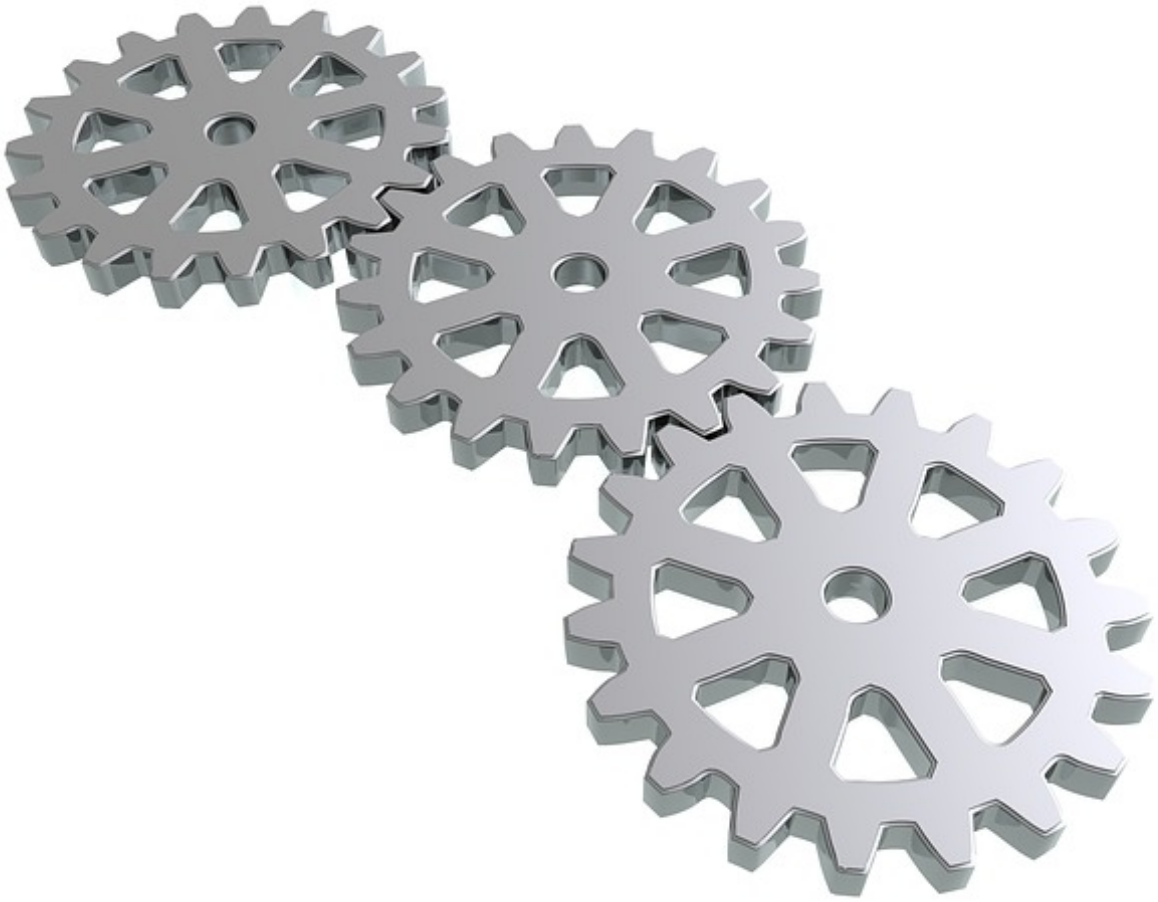
# Configure your project time evaluations



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

The following instructions describe how this action can be configured and customized to your personal requirements for **project time evaluation.** Examples of customizability are, for example, the number and properties of the available **view variants**, the **filter options** for the evaluation, or the **individual layout** of the generated report.

## 1) Create new configuration of the evaluation action

As an administrator, you call up 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. Select "Action" as action type in the first column and enter the name of the desired action in the search field in the second column, in this case **"ptm_getOrgProjectEfforts"**. Click Enter to filter the list, the basic action **"ptm_getOrgProjectEfforts"** will be displayed.

By clicking on **"New configuration"** in the relevant column, a new configuration of the action is created, which can then be personalized. Alternatively, a new configuration can also be created in the action overview via the button "New configuration" and the specification of the basic action (here "ptm_getOrgProjectEfforts"). In both cases two **names** have to be entered as a first step:

- **Name:** unique name of the new configuration, at best with module description (e.g. "ptm_MyProjecttimeReport")
- **Title:** descriptive name of the new configuration, this also appears in the menu tree (e.g. "My project time evaluation")

After clicking on the **"Save"** button, the new configuration will be saved and **further options** will appear on the screen:

## Tab "Settings"

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| **Description** | Possibility to enter a 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 the root action (default value). |
| **Menu Icon** | Choose the icon used to display the configured action in the menu tree. |
| **Menu Icon for Classic-Skin** | Choose the icon with which the configured action is displayed in the menu tree of the classic skin. |
| **Update action's 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. |
| **Inherit permission to following action** | here you can define an additional action for which the same user permissions apply as for the currently edited one. |
| **Default Roles** | Here, you can find an overview of the roles which automatically receive authorization to execute the new configured action. |
| **Unsupported View Ports** | by checking the corresponding box, access to the new configured action can be blocked for certain platforms (mobile, tablet or desktop) |
| ***EDIT CONFIGURATION DETAILS*** | Click on this button to access the actual settings for personalizing and configuring the new action. These configuration options are described and explained in detail firbelow on this page.<br><br>--> immediately jump to the configuration details[1] |
| **Always open in the new window** | if this tickbox is checked, the new action is always opened in a new browser window when it is launched |
| **Is Experimental** | here the new configuration can be marked with the attribute "experimental" |
| **Prohibit Usage for Switsched Users** | If this tickbox is activated, the action can only be executed by the permitted user himself and not by administrators who have switched to this user. |
| **Number of users (maximum licensed)** | here you can see how many users are currently authorized to use this action. Below this, a limit is |

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| | displayed for how many users the corresponding Webdesk license is valid. |

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The options **"Layout template to use"**, **"Controller"** and **"Controller Pattern"** are **extended developer options**, which should only be used in agreement with Workflow EDV GmbH. For further information please contact us directly.

## 2) Edit configuration details

As already 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 dedicated to the actual configuration, i.e. the adaptation of the new function to your needs.

By clicking on the button **"Edit configuration details"** in the tab **"Settings"** you get to a new page where you can show and hide filter options, create new **report templates** and layouts or change the **general appearance** when opening the action.
The configuration options are divided into the following **categories:**

**General Settings**

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

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| **Permissions to use** | This is where the choice is made as to which **user authorizations** are to be used for the projects/ persons that can be displayed for evaluation:<br><br>**View permissions** - *restriction by person only*<br><br>If **"View Permissions"** is selected, all project times of persons who fall into the **column "View Permission"** in the action permission are available. If, for example, "own organizational unit" is selected as view permissions for the role "superior", this user can **display and evaluate** all project times of his own organizational unit in the role of superior. There are no restrictions for the evaluable projects, only for the persons.<br><br>**Project permissions -** *Restriction by project and person*<br><br>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 **tab "Permissions"** in the project list[2].<br>Only projects for which an authorization has been explicitly granted can be evaluated. The evaluable persons within these projects depend on the view authorization for the action, specified in the column "View permissions" of the action settings.<br><br>If, for example, the project manager Rudi Renner is given direct permission to book/report during the creation of the new "advertising campaign" project, he can evaluate the project times of this project for |

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| | persons according to his view permission in the action. |
| **Show user preferences** | |
| **Hide standard reports** | If this tickbox is activated, the two standard reports "project sorted" and "date sorted" are not displayed in the list of possible view variants. |
| **Default report** | Select which report to display first by default in the drop-down list (date sorted, project sorted, custom reports). |
| **Label for not categorized columns** | If there are empty columns in the category columns of the report due to inequalities in the hierarchy, you can specify an alternative label for these empty columns here. |
| **Suppress zeros in TA** | Select Yes/No, whether to display a presence time of 0 hours (from TA) as 0.00 or to completely hide it. |
| **Show chargeability selector** | Select Yes/No whether to display filter option for the query according to **chargeable** and **non-chargeable** projects. If "No" is selected here, all projects are displayed by default. |
| **Show historization selector** | Select Yes/No, whether the possibility of activating/ deactivating the **historization** in the evaluation should be shown in the query for the evaluation. If "No" is selected here, the history is not set by default. |
| **Show time in** | Select whether time expenditure in project time evaluation is to be displayed by default in **normal 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** that are preconfigured in the system and, if approved under "General Settings", are available in each evaluation. For some of the selection lists, the option **"System value"** can be selected in addition to **"Yes"** and **"No"**. In this case, the default settings stored in the **system parameters** are used:

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| **Show comparison with time acquisition** | If "Yes" is selected here (or if the system value says "Yes"), a comparison to the attendance time for the day in question is displayed in the standard reports in separate columns and the difference is calculated. |
| **Show customer** | If "Yes" is selected here (or if the system value says "Yes"), the customer of a project is displayed in a separate column in the standard reports, if available. |
| **Show activity** | If "Yes" is selected here (or if the system value says "Yes"), the activity within the project is displayed in a separate column in the standard reports. |
| **Show from/to times** | If "Yes" is selected here (or if the system value says "Yes"), the start and end times per booking are |

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| | displayed in the standard reports in addition to the project time expenditure in hours. |
| **Show "Billable" option** | If "Yes" is selected here (or if the system value says "Yes"), an additional column is displayed in the standard reports during evaluation to show whether the booked project effort can be billed. |
| **Show week column** | Select Yes/No whether the standard report "date sorted" should be unfolded by year > month > week > day or without week only by year > month > day when unfolding the standard report |
| **Add industry minutes in xls** | Select Yes/No whether a separate column with project and attendance times in industrial minutes is to be displayed when exporting in Microsoft Excel format. |

## Design customized project reports

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

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

**1) General data and description**

- **Report name:** insert the name of the new report here (e.g. "Projects by Employee" or "Productivity Evaluation")
- **Report Id:** define a short name or a code for the new report (e.g. "CustomRep2")
- **Report title (optional):** here, you can insert a title which will be displayed at the top of the page when exporting into PDF or Microsoft-Excel-Format
- **Description:** possibility to insert a detailed description about structure and displayed information of the custom report
- **Row count:** If this tickbox is activated, the **first column** in the report always contains information about the **number of rows** that will be displayed when the group (collapse element) is fully expanded.
- **Management report:** If "project permissions" is selected under " permissions to use" and this tickbox is activated, then all those projects are evaluated for which the user has a view permission ("can report") in the project overview. If, however, access permissions are selected under "Used permissions", this tickbox has no effect.

### 2) Category Columns

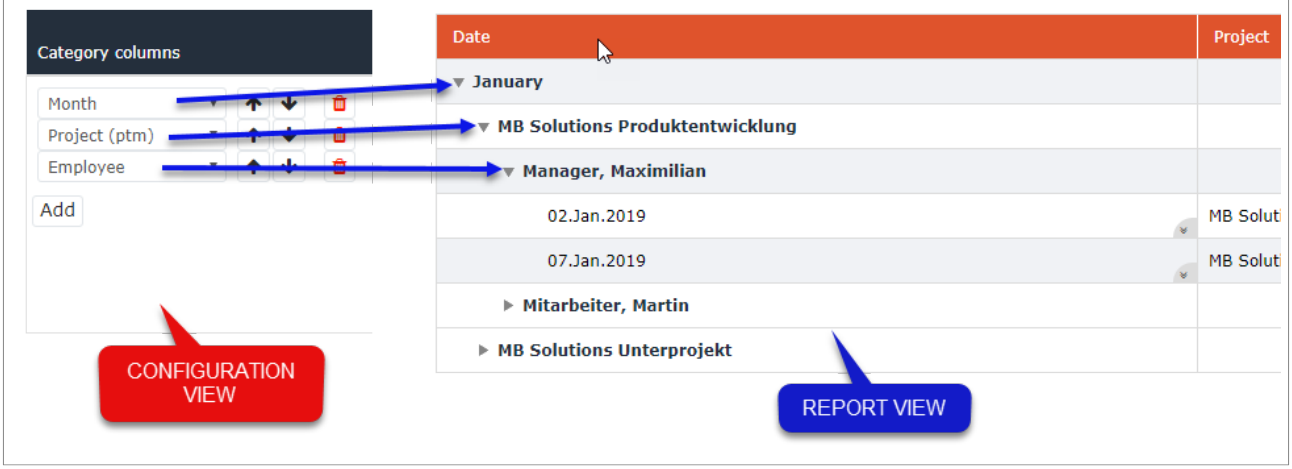
The information selected here is used to determine the **collapsible hierarchy** of the report. Click on **"Add"** to select the data from the list with which the Collapse element is to be constructed.

If, for example, **"Month"** is the **first grouping column**, all project times are **displayed and sorted by month**. If you open the month column, the project times within the month are sorted according to the second grouping column (in this case "Project"). If you also open this column, it will be displayed after the third grouping column (in this case "Employees") and so on...

If you have arrived at the **lowest level** (here "Employee" expanded), the project times are displayed in the columns with the additional information previously selected under "Detail columns". The **up/down arrow keys** can be used to move the **order/hierarchy level** of the grouping columns.

Further information about meaning and function of the specific options choosable as category columns[3]

**Category Columns- comparison between configuration view and report view**



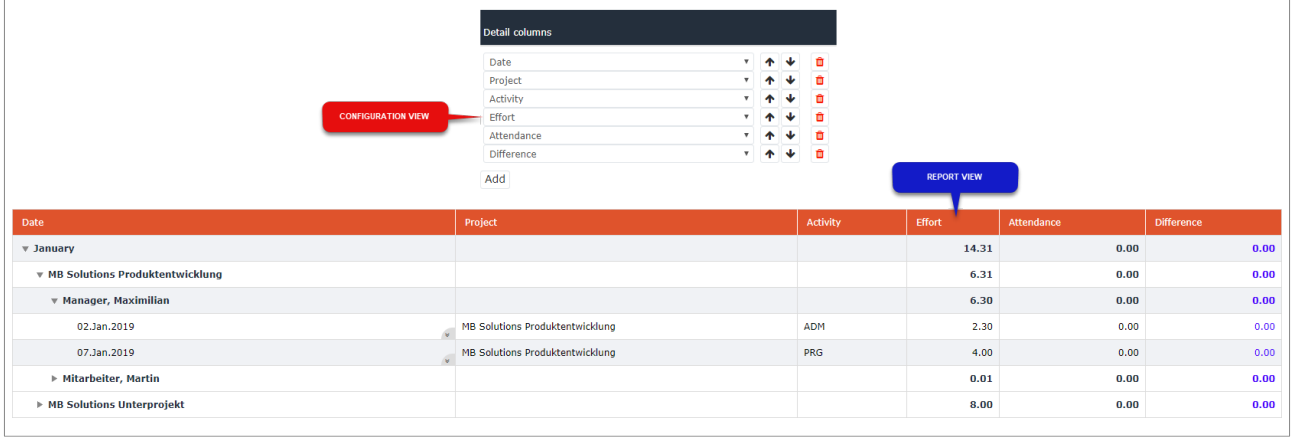

## 3) Detail columns

Durch Klick auf den Button **"Hinzufügen"** lassen sich hier die Informationen für die sogenannten **Detailspalten auswählen**. Beim vollständigen **Ausklappen des Berichts** werden die hier ausgewählten Informationen für die einzelnen Projektbuchungen im Detail in den **Tabellenspalten** angezeigt. Auch die **Reihenfolge** der Detailspalten lässt sich mit den **Pfeiltaste verschieben**, diese werden im Bericht von **links nach rechts** angezeigt.

By clicking on the **"Add"** button, the information for the so-called **detail columns** can be selected here. When the report is **fully expanded**, the information selected here for the individual project bookings is displayed in detail in the **horizontal table columns.** The order of the detail columns can also be moved with the **arrow keys.** Detail columns are displayed in the fully expanded report **from left to right**.

Further information about meaning and function of the specific options choosable as detail columns[4]

**Detail columns - Comparison between configuration view and report view**




## 3) Move and delete

In der **Spalte "Hinauf/Hinunter"** können die definierten Berichte mithilfe der Pfeiltasten als Ganzes hinunter oder hinauf **verschoben** werden. Die hier festgelegte **Reihenfolge** ist die Vorlage dafür, in welcher Reihenfolge die Berichte beim Aufrufen der Aktion unter **"Ansichtsvariante"** angezeigt werden.

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

Klick on

the  -
**icon** in the "Delete" column to **delete** the report draft as a whole.

## other configuration details

Zusätzlich zur Einstellung diverser Parameter und der Definition von Berichten können für die konfigurierte Aktion noch **weitere Optionen**, besonders zu **Formatierung und Erscheinungsbild**, vorgenommen werden:

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

### Context menu

### Formatting

### Styling

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

- **Header row of the report**
- **Detail rows of the report** (single rows per project booking)
- **Grouping rows** (expandable rows within the collapse-element)
- **Detail columns**

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

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| **Grouping row/Detail column** | Only in the Grouping Rows/Detail Columns table available! Selection of the grouping row or detail column which should be formatted. |
| **Background color** | Select the **color** with which the corresponding cells are to be **filled**. The input is possible as HTML/HEX color code, RGB color code or by name of the color (e.g. "yellow"). |
| **Color** | Select the **font color for text** in the respective cells. Input as HTML/HEX color code, RGB color code or color name possible. |
| **Font style** | Selection of the **style for text** in the respective cells. Normal, Bold, Italic, or Bold Italic are available. |
| **Font size** | Select the **font size for text** in the respective cells. The input is possible here in **standard sizes** (small, medium, large) or in **%, cm, px** and **pt**. |
| **CSS Style** | Here you can enter an **entire style definition** in **Inline CSS format**. |
| **Whole** | Only for grouping rows/detail columns available! If this tickbox is activated, the formatting selected for the grouping row is **extended to the entire row length**. If this is selected for the item "Detail column", the formatting is applied to the **entire** |

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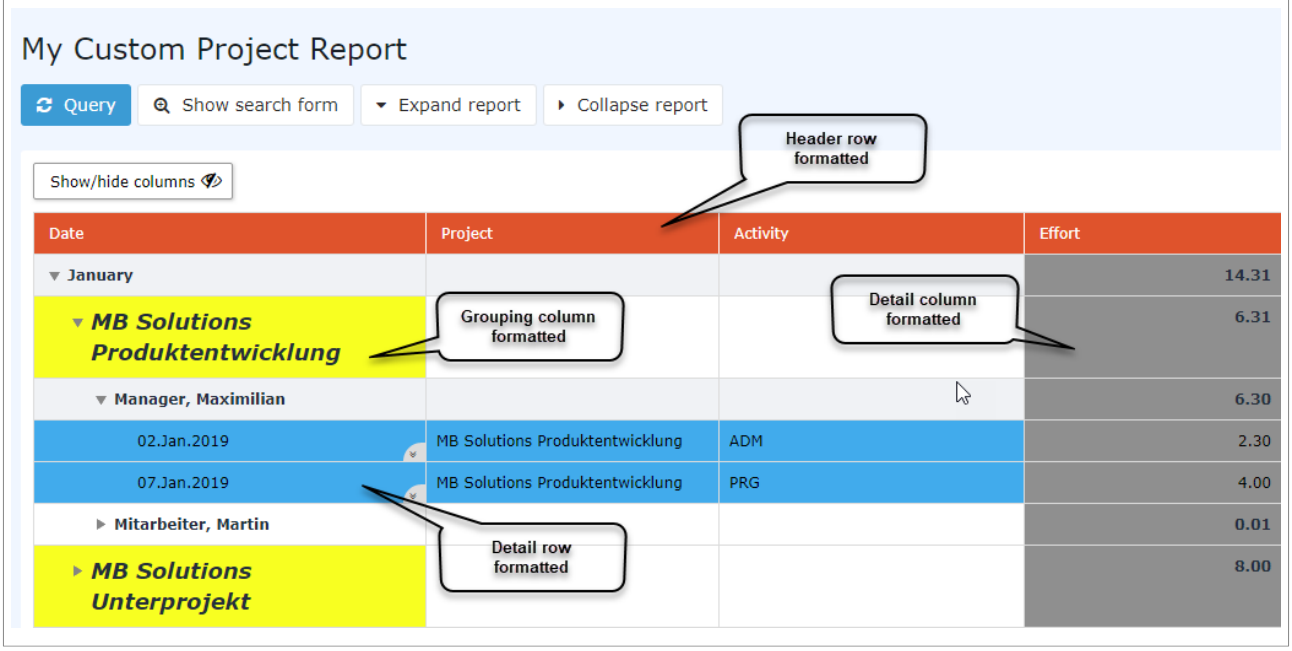
| | **length of the column**, not only to the detail column of the currently opened row. |

**Example for report styling**




1. /daisy/webdesk-manual-en/admin/5754-dsy/8028-dsy/8045-dsy.html#dsy8045-dsy_Konfigurationsdetails
2. /daisy/webdesk-manual-en/admin/5754-dsy/5755-dsy/8019-dsy.html#dsy8019-dsy_Projekte
3. /daisy/webdesk-manual-en/admin/5754-dsy/8028-dsy/8045-dsy/8138-dsy.html
4. /daisy/webdesk-manual-en/admin/5754-dsy/8028-dsy/8045-dsy/8138-dsy.html#dsy8138-dsy_Detail Columns