Project efforts

General information

The structure of this menu item is similar to the one described in the chapter My Project Times[1] . The menu item **Project efforts** is visible for those persons who have been assigned the correction "Reports" for one or more projects via project permission.

The result of the project effort query can also be exported as PDF or Excel or prepared for printing. The corresponding

symbols 🖨 📕 📊 are
located in the upper right corner.

Display individual bookings and expand report

The result of the query can be expanded by clicking
on 🔽 -
i.e. each individual booking is displayed in the corresponding period.

In order to better illustrate the effect of the individual parameters, this action was performed for all screenshots. Here is the only exception:

🗁 Projektaufwände   🖨 📕 📊

🔄 **Abfrage** 🔍 **Suchvorgaben anzeigen** 🔽 **Bericht expandieren** 🔺 **Bericht zusammenfalten**

Projektaufwände: Projektbericht vom 1. Juli 2015 bis 31. Juli 2015.

Anzahl	Mitarbeiter	Summe PJZ
1	▸ **Buchhaltung**	4,00
1	▸ **Kundenprojekte**	4,47
1	▸ **Workflow EDV**	3,00
2	▸ **interne Projekte**	7,40
		19,27

(In this screenshot the report was folded by clicking
on 🔺 *.*
It is now only a rough overview of the year 2015.)

The search mask

From and To

These parameters are used by the user to set the time period to be queried. This can be done both by direct input (in dd.mm.yyyy format) and by clicking on the corresponding day in the

calendar ▦ .

Structure

This is to be understood as the path under which the respective project can be found. Also starting with the prefix. However, since there is usually only one structure anyway, there is usually no need to make any changes here.

Project

It is possible to directly select projects by entering (parts of) the name/short name or codes. If the entered text cannot be clearly assigned to a project, a list of all projects corresponding to the input is displayed.

Alternatively, the list view of the projects can be opened by clicking on .

This is explained in detail in the menu item Project time booking[2] .

View variant

In this dropdown element you can decide whether the result of the query should be sorted by booking element (project time booking), chronologically by date, by project or by employee. The effect of this choice is shown under Evaluation Examples.

Selecting the billability

This parameter determines whether or not the system is to filter on the basis of billability. All: All projects are displayed regardless of their allocability. If you select Billable, only those projects are evaluated in the query that were previously defined as billable.

Display project hierarchy

This parameter is not available for selection if the Sorted by date option is selected under **View variant**. If Display **project hierarchy** is now set to *Yes*, the difference between projects and subprojects is clearly displayed in the result of the query (Hierarchy).

Display single bookings

If this parameter is set to Yes, the result of the evaluation gives you access to all your own bookings made for the respective projects / the selected project.

Alternative report title

The text entered here will later appear as the headline of the time report instead of the default report title "My Project Times".

Output format

If you leave this field blank, you get the output on the screen. Alternatively, the result can also be displayed as a print-friendly version or saved as a PDF or Excel file.

Selection tree

This parameter offers the following selection options: Groups with access authorization, All groups.

- **Groups with access rights**: Displays all groups that the user has access to.
- **All groups**: displays all groups of the company, even if the user is not authorized to view them all.

Search

If a search term is entered, the system searches in all groups for which access authorization exists. It is possible to search for a complete name (surname, first name) or for a part of the name. The result then contains all possible surnames as well as first names and is highlighted in color.

Include selection in search

In principle, all groups for which access authorization exists are searched when an entry is made in the **Search** field.If this option is checked, only the groups selected under **Selection** will be searched.

Selection

With this parameter, the user has the choice between organigrams and favorites, which can be created by the user himself.

- **Organigram**
    - All folders marked with a plus (+) symbol can be expanded further to show the subunits.
    - By **double-clicking**, all subunits are automatically checked.
    - By clicking on the green arrow > **Display subgroups to depth** (depth 1-3) > all existing subgroups are displayed.
    - Use the blue arrow > **Minimize tree** > to minimize this view again, only the parent groups appear on the screen.
    - **Show details** > By clicking on the symbol, the selected groups are clearly displayed in a list to the right of the

      symbol   .
      Click again to hide the detailed information.
    - Clicking the **query** button starts the search.
- **Favorites**
  Using this parameter, each user can create their own favorites list, which can contain both persons and groups that are frequently queried. The Favorites list can be customized at any time.

- To **add a person to the favorites list** > click the blue arrow > select a person > click the "Add" button
- The order of the persons on the favourites list can be changed at any time using the arrow keys
- If you want to remove a person from the favorites list, click on the red delete icon to the right of the name.
- The same procedure is used for **groups**.

Evaluation examples

The following screenshots show the effects of some of the parameters described above.

View variant

In the screenshot above, the **View variant** parameter was set to **Sorted by booking element**. This results in a structure according to the individual projects. Each project time entry is displayed under the corresponding project - the entries are therefore only displayed chronologically within one project. The year and month of the booking are followed by the department and the name of the employee who entered the project time. This makes it possible to see exactly how the sum of the project expenses is made up.

In the screenshot above, the **View Variant** parameter has been set to **Sorted by Date** - so all project time entries, regardless of which project they concern, are displayed in chronological order. As described in the previous screenshot (Sorted by booking element), all employees are listed under the respective group names that were previously selected in the search mask under the **Selection** parameter.

Projektaufwände

Projektaufwände: Projektzeit nach Projekt vom 1. Juli 2015 bis 31. Juli 2015.

Anzahl	Datum	Mitarbeiter	Kommentar	PJZ Aufwand
2	▼ Buchhaltung			4,00
2	▼ Juli			4,00
2	▼ Huber, Peter			4,00
	13.07.2015	Huber, Peter	Verbuchung der laufenden Geschäftsfälle	3,15
	15.07.2015	Huber, Peter	Umsatzsteuervoranmeldung	0,45
4	▼ Kundenprojekte			4,47
4	▼ Juli			4,47
4	▼ Renner, Rudi			4,47
	10.07.2015	Renner, Rudi	Installation eines neuen Moduls	3,45
	15.07.2015	Renner, Rudi	Einschulung der Neukunden in den Webdesk3.	0,17
	15.07.2015	Renner, Rudi	Support	0,45
	15.07.2015	Renner, Rudi	test	
2	▼ Workflow EDV			3,00
2	▼ Juli			3,00
2	▼ Renner, Rudi			3,00
	06.07.2015	Renner, Rudi	Updates	2,00
	13.07.2015	Renner, Rudi	Support	1,00
5	▼ interne Projekte			7,40
5	▼ Juli			7,40
2	➡ ▼ Huber, Peter			2,10
	13.07.2015	Huber, Peter	Neustrukturierung der Aktenverzeichnise	1,40
	15.07.2015	Huber, Peter	Versicherungsvergleich	0,30
3	➡ ▼ Renner, Rudi			5,30
	06.07.2015	Renner, Rudi	Einschulung des neuen Mitarbeiters	2,30
	13.07.2015	Renner, Rudi	Wartung der EDV-Anlagen	1,15
	13.07.2015	Renner, Rudi	wöchentliches Meeting	1,45
				19,27

In the screenshot above, the **View Variant** parameter was set to **Project Time by Project**. The example of the internal projects clearly shows that in this view variant not only the recorded project times of the logged in user, but also those of all other employees appear under the corresponding project.

Which employees are displayed here depends on which groups or persons have been selected in the project effort search mask under the **Selection** parameter.

Projektaufwände

Projektaufwände: Projektzeit nach Mitarbeiter vom 1. Juli 2015 bis 31. Juli 2015.

Mitarbeiter	Datum	Projekt	Kommentar	PJZ Aufwand
▼ Huber, Peter				6,10
▼ Juli				6,10
Huber, Peter	13.07.2015	Buchhaltung	Verbuchung der laufenden Geschäftsfälle	3,15
Huber, Peter	13.07.2015	interne Projekte	Neustrukturierung der Aktenverzeichnise	1,40
Huber, Peter	15.07.2015	Buchhaltung	Umsatzsteuervoranmeldung	0,45
Huber, Peter	15.07.2015	interne Projekte	Versicherungsvergleich	0,30
▼ Renner, Rudi				13,17
▼ Juli				13,17
Renner, Rudi	06.07.2015	Workflow EDV	Updates	2,00
Renner, Rudi	06.07.2015	interne Projekte	Einschulung des neuen Mitarbeiters	2,30
Renner, Rudi	10.07.2015	Kundenprojekte	Installation eines neuen Moduls	3,45
Renner, Rudi	13.07.2015	interne Projekte	Wartung der EDV-Anlagen	1,15
Renner, Rudi	13.07.2015	Workflow EDV	Support	1,00
Renner, Rudi	13.07.2015	interne Projekte	wöchentliches Meeting	1,45
Renner, Rudi	15.07.2015	Kundenprojekte	Einschulung der Neukunden in den Webdesk3.	0,17
Renner, Rudi	15.07.2015	Kundenprojekte	Support	0,45
Renner, Rudi	15.07.2015	Kundenprojekte	test	
				19,27

In the above screenshot the parameter **View variant** was set to **Project time by employee**. This results in a structure according to the individual employees. Each project time entry is displayed under the corresponding employee - the entries are therefore only displayed chronologically within one employee. Which employees are displayed here depends on which groups or persons have been selected in the project effort search mask under the parameter **Selection**.

Display project hierarchy

In the screenshot above, the parameter Display **project hierarchy** was set to **Yes**. Subprojects (here: Workflow EDV) are displayed in the expanded view with line indent. Subprojects do not appear in the folded view.

Display single bookings: Yes

In the previous examples, the parameter **Display single bookings** was set to **Yes**. This means that all project time entries posted on that day are displayed under each date.

Display single bookings: No

In the screenshot above, the **Display single bookings** parameter was set to **No**. Therefore, only the project time totals of the days on which project times were recorded are listed under the respective calendar weeks, but not the booking elements (single bookings) themselves.

Alternative report title

In the above screenshot, the text framed in red on the screenshot was entered using the **Alternative Report Title** field. The text is freely selectable and replaces the default title "My project times:", which can be found here on all other screenshots.

1. /daisy/personalwolke-default-en/6899-dsy/g1/6891-dsy.html
2. /daisy/personalwolke-default-en/6899-dsy/6887-dsy.html