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2.02.02 Process

The Process mask manages the tasks of the projects. In projectile, operations are the grouping of [work packages](#). This mask shows the activity, the period and the expenses (plan, target, actual, rest, billable, invoiced).

The mask consists of the following elements:

General Data



- **Basic Information:**

- **Number:** This element identifies the task as a process. In projectile, an activity is a grouping of one or more work packages that contain the same activity and the same time period.
- **Description:** This field identifies the process description.
- **Project:** This field defines the project to which the defined task belongs. An activity can be assigned to a main project as well as to a sub-project. The projects can be defined and changed in the document type [projects](#).
- **Occupation:** This field defines the activity of the employee within the task. This activity usually determines [cost](#) and [price determination](#) and is also used for the suggestion system. The activities can be defined and changed in the document category [activity](#).
- **Start of Planning/End of Planning:** The field plan start indicates the start of the processing of the activity and is determined by the plan start of the earliest work package assigned and the field Plan end indicates the due date of the work package and is preset with the plan end of the latest work package assigned.

- **Parameters:**

- **External Project:** This field indicates whether the operation is external, that is, billable. If the selection box is activated, the selected operation is an external task, otherwise it is an internal one. This selection is preset for all activities in external projects.
- **Release for Recording:** This indicator is preset and, if deactivated, allows projects that are active in work packages NOT to be entered.
- **Closed:** This indicator is set automatically by the system when all assigned work packages have been completed.
- **Not Overbookable:** If this indicator is set, no more times can be entered for the work packages in this operation in the total than are scheduled in the operation.

- **Jobs:** This element contains a list of all [jobs](#) assigned to the operation.

Status



- **Technical Settings & Details:**

- **int. Key:** This numeric field uniquely identifies the process. This number is proposed by the system.
- **Number of Employees:** Currently not used in the standard version.
- **Capacity Calculation:** Currently not used in the standard version.

- **Status:**

- **Planned Effort:** In this field, the estimated net time expenditure of the operation is defined. The cumulated planned values of all activities in a project are the basis for costing and controlling (planned/actual comparisons).
- **Target Effort:** This field is determined by the system during planning and defines the estimated project duration in hours or days. During planning, this value is updated (analogous to planned effort) and when planning is completed (status transition to "advance work" or "active"), this value is not changed.
- **Actual Effort:** The content of this field shows how many hours have been posted to this task in the [time recording component](#) so far.
- **Billable Effort:** This value displays the billable effort of the activity. This value can be entered in the [time recording component](#) or in the dialog "Billable times".
- **Billed Effort:** This field displays the number of hours that have already been billed in the [invoices](#) for the project. This field is determined automatically when the invoice is billed.
- **Remaining Effort:** This field shows the last defined remaining effort in hours from the [TimeTracker](#) entry component. The value from the work packages is cumulatively transferred to the [Projects](#).

Actions

The document class contains the following action:

- **Edit Process:** You can use this action to open the dialog for case processing. Here you can, among other things, edit basic values of the case, assign several employees for the work package and view the employee workloads.
- **Complete Process:** This action is used to close the process.

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