

12.3 Project Tasks

Operations comprise the internal phases of the planning that, once completed, lead to the conclusion of the project.

Project Tasks (3) - List ✕

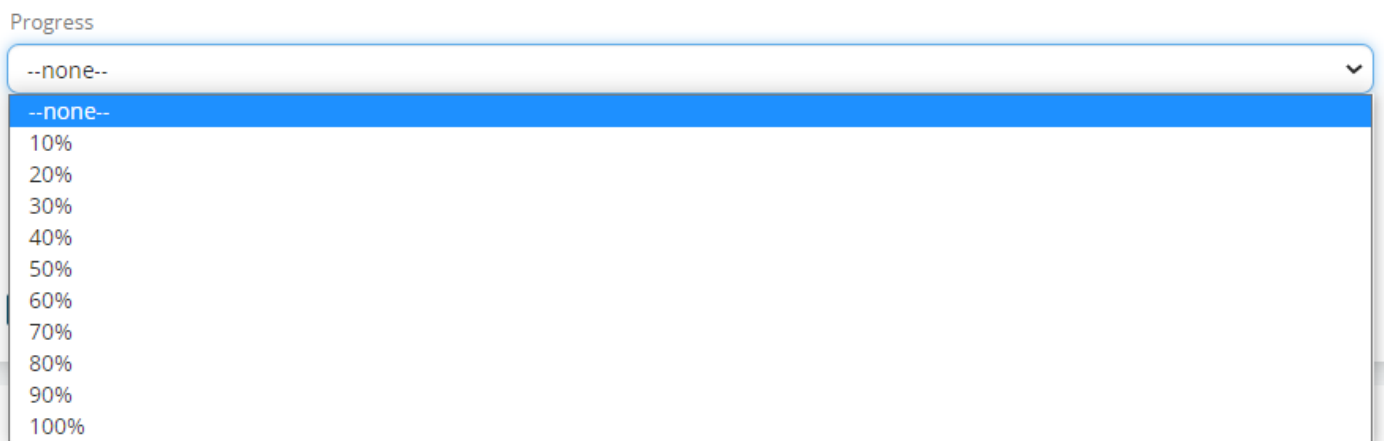
Showing 1 - 3 of 3 Add Project Task

Action	Task Name	Start Date	End Date	Progress	Assigned To
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Montaggio e collaudo impianto	03-06-2022	03-06-2022	--none--	mariobianchi12345@gmail.com (Mario Bianchi)
	Progettazione impianto	03-06-2022	03-06-2022	50%	mariobianchi12345@gmail.com (Mario Bianchi)
	Sopralluogo per impianto	03-06-2022	03-06-2022	20%	mariobianchi12345@gmail.com (Mario Bianchi)

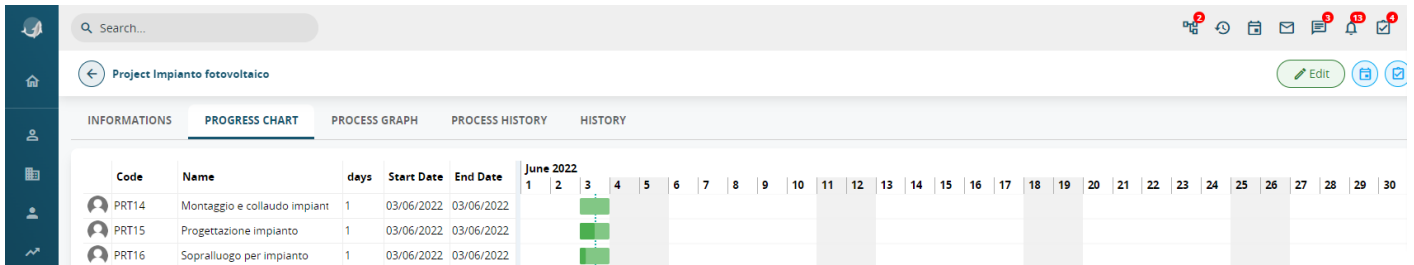
The user assignee of the operation will be able to update the state of progress of the activity through the Progress and Hours spent fields.

The report will provide an overview of the progress of the planning, both through the list of operations and the Gantt diagram. The colours of the Operations bars in the graph corresponds to the colours chosen for the "Priority" field (drop-down menu), managed directly from Settings>Colouring View by List.

Within the coloured bar, an additional darker coloured bar shows the progress status (based on the Progress field).



Progress detail



Example of a Planning Chart with multiple Operations

Complete list of available fields and their functions:

Operation Name	Field to enter the name of the Operation
Operation Number	Automatic progressive numbering, filled in when saving
Priority	Determines the priority of the specific Operation and possibly the color of the bar shown in the GANTT chart, if configured in <i>Settings > List View Coloring</i> for this field
Type	Dropdown menu with preset, editable values
Related to	The related Project can be found here
Sales Order	The related Sales Order can be found here
Progress	Dropdown menu with preset, editable values
Ore Lavorate	Free input field
Start Date	Sets the start date (important for calculating the expected duration and therefore for the correct display of the GANTT chart)
End Date	Sets the end date (important for calculating the expected duration and therefore for the correct display of the GANTT chart)
Auto Calculation of Expected Duration	By flagging this field, the expected duration is automatically filled in, calculating it in “days” based on the values entered in the Start Date and End Date fields. WARNING: if this is not done, the GANTT chart will not correctly display the expected time span for individual operations
Expected Duration	Field automatically filled as a result of the previous point
Description	Free description field

Hours/Budget Management in Operations

From vtenext 20.04 in the module Project Task we can find the new field “Budget Information” in order to split the service delivery among Project, Pack and Consumptive.

Possible configurations:

<p>Project</p>	<p>Within a project operation, vtenext, counts the foreseen hours according to the Sales Price of the Product/Service sold, dividing it by Price per day reported on the Company record.</p> <p>The automatic completion of the fields: Used Hours, Used Budget and Residual Budget take place when an event is closed setting the value "Held" in the field status. Events must be linked directly to projects task as well as tickets that have been linked to projects task.</p>
<p>Pack</p>	<p>The Operation Pack allows to count a total of sold hours per Product/Service within the field Package Hours. The automatic reduction of Used hours and Residual Hours happen when an event is closed setting the value "Held" in the field status. Events must be linked directly to projects task as well as tickets that have been linked to projects task.</p>
<p>Consumptive</p>	<p>Consumptive operation will count the Used Hours and the Used Budget according to the related tasks or tickets. It will automatically insert the number of hours that have to be invoiced, which will vary from the value set manually from the users in the field Invoiced Hours, when an event is closed setting the value "Held" in the field status. Events must be linked directly to projects task as well as tickets that have been linked to projects task.</p>

Within the new section called " Budget information" there is an automatism which associate each selected service type (Project,Package and Comsumptive) to an action of adding/reducing hours inside the reserved fields in the section. The necessary condition to enable the automatism, as above described, is to add a linked event to the project task or alternatively to add an event to a ticket which is linked to the project task in the following ways:

- create an event using the activity tracking tool (play button at the top right of screen);
- create an event by pressing the calendar icon at the top right of screen;
- create an event by selecting the calendar relation on the right part of the screen.

The screenshot shows the 'Account demovte' page in a CRM system. The 'Daily cost (€)' field is highlighted with a red box and contains the value '500.00'. The interface includes a search bar, navigation icons, and a sidebar with 'SHORTCUTS' and 'RELATIONS' sections.

Assigned To	qneclklqelozjhxwhg@pptrvv.com (Capitan America)	yes	Time modified	03-06-2022 12:48:24
Time created	28-12-2021 16:14:07	Creator	qneclklqelozjhxwhg@pptrvv.com (Capitan America)	
Email		Daily cost (€)	500.00	
Percentuale	0	firma test	No Signature	

Address Information

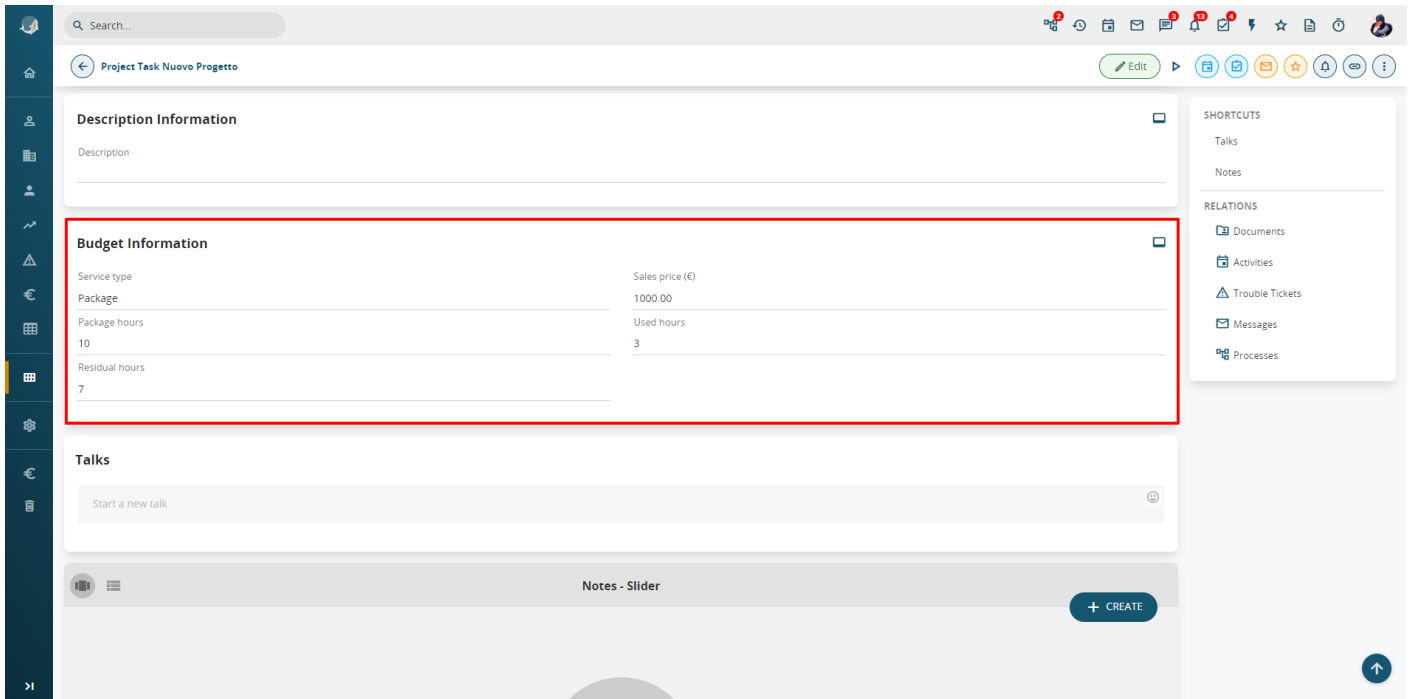
Billing Address	Shipping Address
Billing PO Box	Shipping PO Box
Billing City	Shipping City
Billing State	Shipping State
Billing Postal Code	Shipping Postal Code
Billing Country	Shipping Country

Daily cost field in the Account module

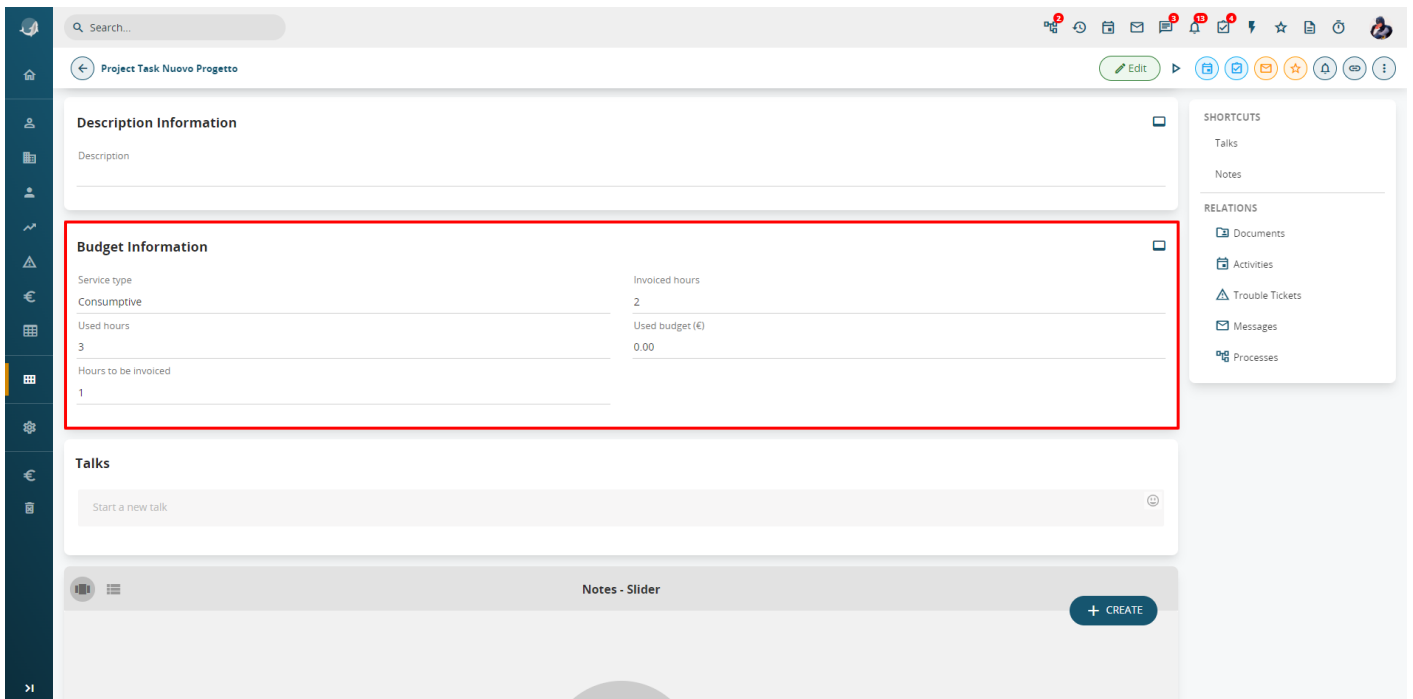
The screenshot shows the 'Project Task Nuovo Progetto' page. The 'Budget Information' section is highlighted with a red box. It displays fields for 'Service type', 'Project', 'Expected hours', 'Used budget (€)', 'Sales price (€)', 'Used hours', and 'Residual budget (€)'. The interface also includes a search bar, navigation icons, and a sidebar with 'SHORTCUTS' and 'RELATIONS' sections.

Service type	Project	Expected hours	Used budget (€)	Sales price (€)	Used hours	Residual budget (€)
		0	62.50	5000.00	1	4937.50

Detail Project with Project Budget



Detail Project with Pack Budget



Detail Project with Consumptive Budget

N.B. As the type of Service Delivery varies, vtenext does not recalculate the hours previously used.

Revision #1

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