

Summarizing Efforts

TIM offers the user the chance to summarize the potential accumulation of monetary or temporal efforts within a process. Efforts may be summarized for either individual tasks or an entire instance.

Summarizing efforts for a task

The tab labeled **Efforts** is most easily reached using the context menu of a task. A table listing the summarized efforts appears in the opened screen. Using the **Summarize Efforts** button, the accumulated efforts are summarized. A form is then opened (see screenshot), in which the necessary information will be stored.

Effort

Effort

Effort type

Costs ☐ Time ☒

Description *

Drive to sales meeting with Random Inc.

Cost center *

Travel expenses

Currency

Euro

Financial effort

100

Save

Field	Description
Effort Type	Choose whether the selected effort is summarized on a monetary- or a temporal basis.
Description	An additional description may be given here in order to summarize the effort in greater detail.
Cost center	The appropriate cost center is entered here.
Effort	The magnitude of the effort is summarized here (cost = currency, time = minutes)

The summarized efforts for a given task are listed in the table that is found in the “Efforts” tab (see screenshot).

Task

Properties | Documents | Note | Links | Efforts | Model | Smartform

Creation time	Creation user	Cost center	Value	Unit	Hourly	Total	Currency	Description
05/20/2016, 10:18 AM	p.m.	Travel expenses	100	Register effort	-	-	Euro	Drive to sales meeting with Random Inc.
05/20/2016, 10:19 AM	p.m.	HR	510	min	-	-	-	Sales meeting with Random Inc.

Efforts of an instance

As with the efforts for a task, the efforts for a given instance are most easily reached using the context menu. However, efforts may only be summarized for individual tasks and not for entire instances. Consequently, the button **Summarize Efforts** is missing from the **Efforts** tab. In order to provide the process manager with an overview of all involved efforts, the cumulative efforts for all of the tasks is listed (see screenshot).

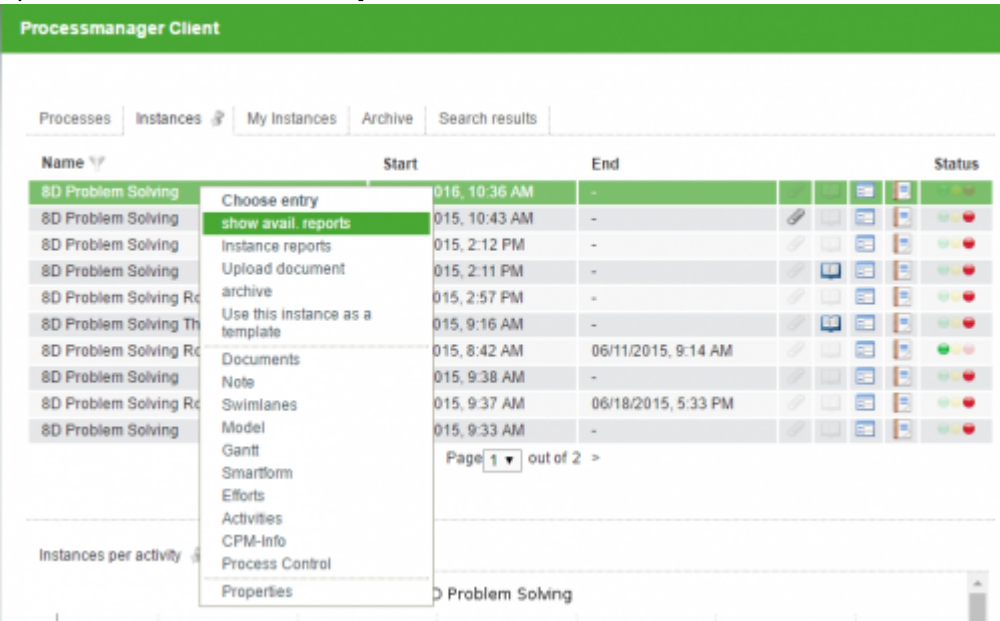


The screenshot shows a window titled "Process instance" with a tabbed interface. The "Efforts" tab is active, displaying a table with columns: Creation time, Creation user, Cost center, Value, Unit, Hourly, Total, Currency, and Description. The table lists three entries for "8D Problem Solving" with creation times 01/29/2016, 01/29/2016, and 05/20/2016. Below these, there are summary rows for "Sum costs", "Sum times", "Sum hourly * time", and "Sum total" for each entry, showing cumulative values in Euro and minutes.

Creation time	Creation user	Cost center	Value	Unit	Hourly	Total	Currency	Description
01/29/2016, 9:26 AM	p.m	Costcenter Munich-North	500	-	-	-	-	Server installation
01/29/2016, 9:27 AM	p.m	Costcenter Munich-North	210	min	-	-	-	Setup server
05/20/2016, 11:09 AM	p.m	Costcenter Munich-North	500	Euro	-	-	Euro	Hardware
			Sum costs:	500	Euro	-	-	
			Sum times:	0	min	-	-	
			Sum hourly * time:	0	Euro	-	-	
			Sum total:	500	Euro	-	-	
			Sum costs:	500	-	-	-	
			Sum times:	210	min	-	-	
			Sum hourly * time:	0	-	-	-	
			Sum total:	500	-	-	-	

Exporting effort reports

The efforts of an instance can be exported as an Excel file. The effort reports are accessed via the option **Show available reports** within an instance's context menu (see screenshot).



The screenshot shows the "Processmanager Client" interface. At the top, there are tabs for "Processes", "Instances", "My Instances", "Archive", and "Search results". Below the tabs is a table with columns: Name, Start, End, and Status. The table lists several instances of "8D Problem Solving". A context menu is open over the first instance, showing options like "Choose entry", "show avail. reports", "Instance reports", "Upload document", "archive", "Use this instance as a template", "Documents", "Note", "Swimlanes", "Model", "Gantt", "Smartform", "Efforts", "Activities", "CPM-Info", "Process Control", and "Properties". The "show avail. reports" option is highlighted.

The exported excel file contains all summarized efforts as well as the cumulative effort of the instance (see screenshot).

	A	B	C	D	E	F	G	H	I
1	Process instance:	8D Problem Solving							
2	Type	Date	Creator	Cost Center	Effort	Unit	hourly wage of cost center	Hourly wage * time	Description
3	Cost in Euros	29.01.2016 - 09:26 AM	m, p	Costcenter Munich-North	500		0,00	0,00	Server installation
4	Cost in Euros	20.05.2016 - 11:09 AM	m, p	Costcenter Munich-North	500	Euro	0,00	0,00	Hardware
5				Sum Costs	1000				
6									
7	Time in Minutes	29.01.2016 - 09:27 AM	m, p	Costcenter Munich-North	210	min	0,00	0,00	Setup server
8				Sum Time	210	min			
9									
10									
11				Total					
12				Total cost	500,00				
13				Total time	210	min			
14				Total time cost	0,00				
15				Total	500,00				
16									
17				TotalEuro					
18				Total cost	500,00	Euro			
19				Total time	0	min			
20				Total time cost	0,00	Euro			
21				Total	500,00	Euro			
22									

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Last update: **2021/07/01 09:54**