

[previous](#) [Home](#) [next](#)

3.11.06 Employee Administration

In Projectile, the employees are members of the project teams. The document type employee, administers information about employees, their access permissions in the system, and cost rates and cost accounting, overtime and vacation entitlement.

When creating a new employee, some fields are automatically pre-populated. In the standard version of the Projectiles these are:

- **Active User:** Pre-populated with "Yes"
- **Employee Status:** Pre-populated with the status fixed employee
- **Location:** Pre-populated with the location of the company
- **Language:** Pre-populated with the language of the location
- **Country:** Pre-populated with the country of the location
- **Maximum Capacity:** Pre-populated with 100%.

The screenshot shows a web-based form for managing an employee named Klaus Abel. The form is titled 'Mitarbeiter Abel Klaus' and has a menu bar with options like 'Dokument', 'Bearbeiten', 'Ansicht', 'Rückverweise', and 'Aktionen'. Below the menu are tabs for 'Stammblatt', 'Adresse', 'Kommunikation', 'Pop3', 'AZ-Verwaltung', 'Fähigkeiten', and 'Sonstiges'. The 'Stammblatt' tab is active, showing fields for personal data and organizational details. The 'Unit' field is a list box showing two units: '001 Bayern' and '011 München'. The 'Aktiver Benutzer' checkbox is checked, and the 'Login' field contains the value 'klaus'. The 'Standard-Benutzerrolle' dropdown is set to '2 Manager'.

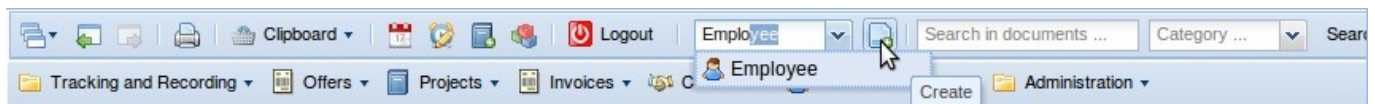
Required fields: Employee, user group, login, employee status, location, salutation, name, max. capacity, max. working hours

Characteristics:

- Only active employees (activity="Yes") can log on to the system.
- The occupations should be maintained so that the suggestion scheme has a reasonable foundation.
- The information in the charge rate field is used for internal cost accounting. If this field is not filled out, the system uses the internal hourly rates of the occupations for cost accounting. These internal hourly rates usually differ from work costs because the costs are directly influenced by the salary of the employees and not primarily by the occupation.
- The e-mail addresses should be filled out by at least the active users, so that the [timed actions](#) (mail messenger) can be used.
- Further elements and actions are described in [working time administration](#).

Defining New Employees

The following example, a new employee is created. First, the functionality is activated using "Create" and with the selection "Employee".



A new document is then opened with various pre-populated fields:

A screenshot of the 'Employee' document form. The form is divided into several sections with tabs: 'Master data', 'Address', 'Communication', 'Work time management', 'Skills', and 'Misc'. The 'Master data' tab is active. Fields include: 'Personell ID' (empty), 'Anrede' (dropdown), 'Titel' (dropdown), 'Name' (empty), 'First name' (empty), 'Status' (dropdown, set to 'Fixed'), 'Function' (dropdown), 'Branch' (dropdown, set to 'Frankfurt'), 'Cost center' (dropdown), 'Unit' (dropdown, set to 'No entries'), 'Active user' (checkbox, checked), 'Login' (empty), 'Default user role' (dropdown), and 'Benutzersprache' (dropdown, set to 'English').

After all the information of the first tab is entered, the document is saved with ¹⁾. In the example, a new employee Jean Griffith has been newly created. This employee must be active (is able to log on to the system) and belongs to the user group manager (see also Administration Guide) and is assigned the login "jean". The user must log in with this identification. The status "fixed" is required for costing and cost accounting. Here, salaried employees are considered, but external or contract

employees are not (they are usually billed through [foreign invoices](#)). The language has not only informal character, but determines the language in Projectile.

After defining the fields on the tab “master data”, the document is then saved.

The screenshot shows the 'Employee Griffith Jean' form with the 'Master data' tab selected. The form contains the following fields:

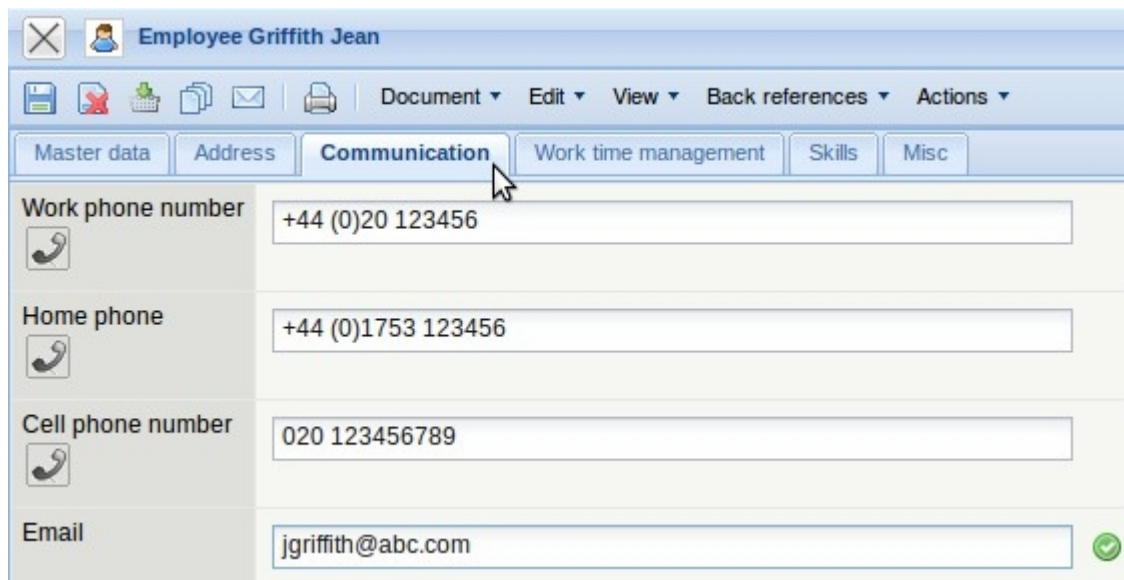
- Personell ID:** 12345
- Anrede:** Misses
- Titel:** (empty)
- Name:** Griffith
- First name:** Jean
- Status:** Fixed
- Function:** Consultant
- Branch:** London
- Cost center:** Marketing
- Unit:** A table with 1 row: 1 Marketing and Sales
- Active user:** ☒
- Login:** jean
- Default user role:** 2 Manager
- Benutzersprache:** English

The employee's address can be entered on the “Address” tab:

The screenshot shows the 'Employee Griffith Jean' form with the 'Address' tab selected. The form contains the following fields:

- Address:** 82-83 High Street
- Postal code:** SL4 6AF
- City:** Eton
- Country:** Great Britain

On the “Communication” tab, the telephone numbers for work, home and cell phone and the e-mail address ...



Employee Griffith Jean

Document Edit View Back references Actions

Master data Address **Communication** Work time management Skills Misc

Work phone number +44 (0)20 123456

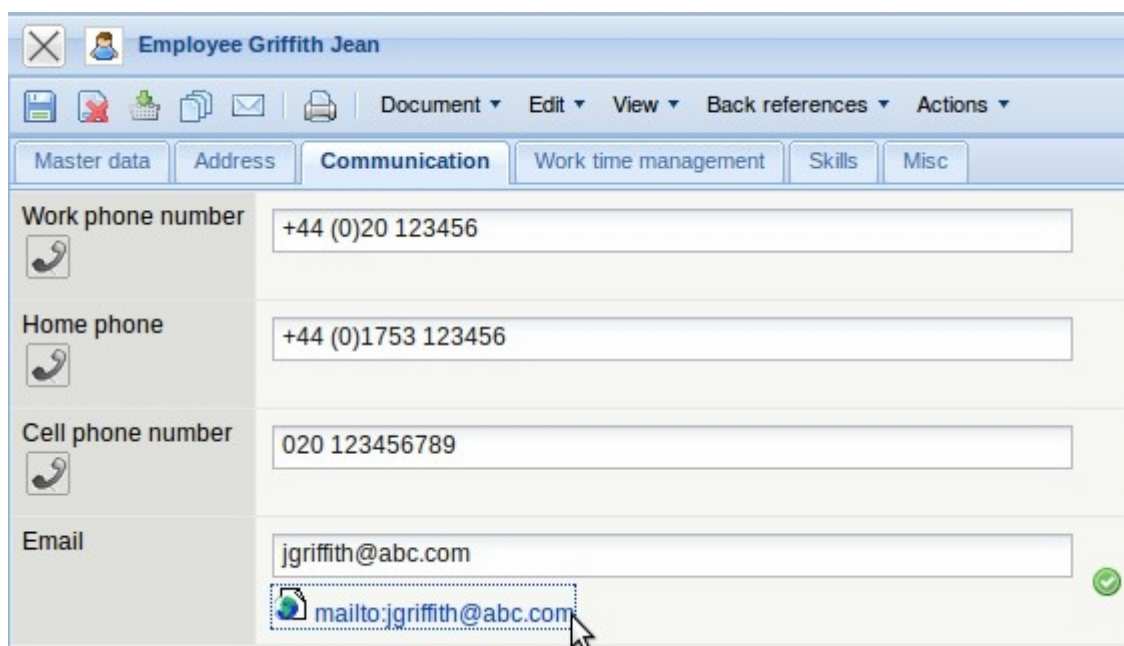
Home phone +44 (0)1753 123456

Cell phone number 020 123456789

Email jgriffith@abc.com

... can be entered for the employee and then saved.

The link to the e-mail address ...



Employee Griffith Jean

Document Edit View Back references Actions

Master data Address **Communication** Work time management Skills Misc

Work phone number +44 (0)20 123456

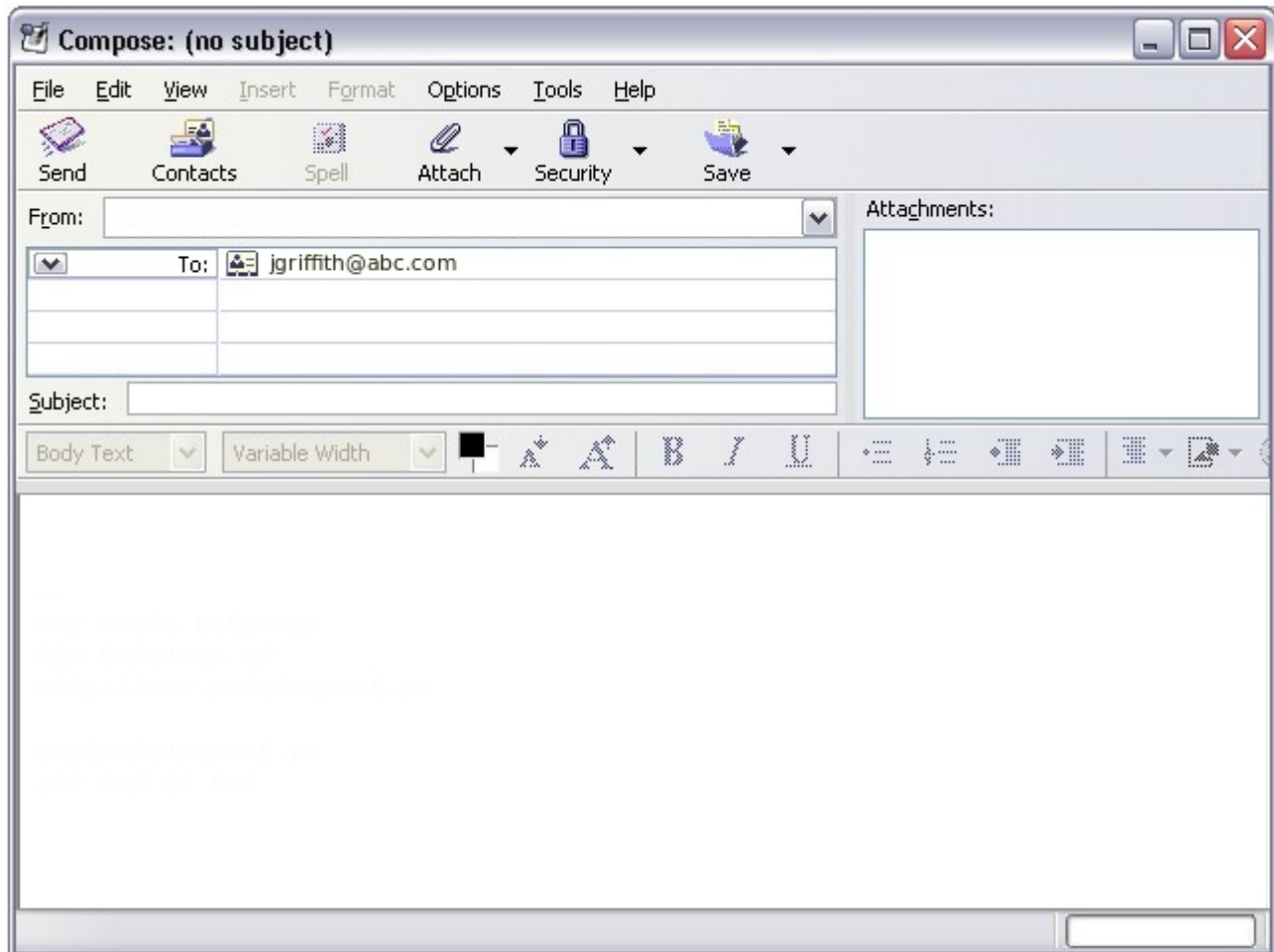
Home phone +44 (0)1753 123456

Cell phone number 020 123456789

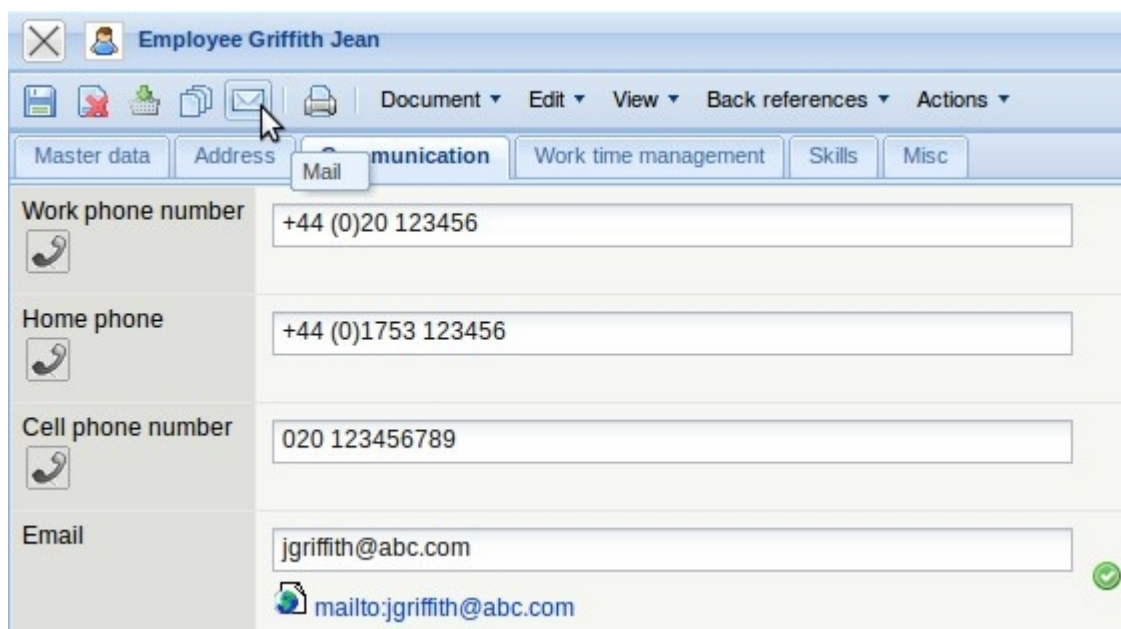
Email jgriffith@abc.com

<mailto:jgriffith@abc.com>

... open the standard e-mail client of the user.



If the optional mail system [mailer](#) is used, clicking the mailer in the function bar ...



Mitarbeiter Batzeck Klaus

01 - Paßwort setzen

Stammblatt Adresse Kommunikation Sonstiges Alle

Telefon 061 31 / 123 - 40

Privat 061 31 / 456 78

Mobil 0172 / 10 20 300

Email-Adresse batzeck@firma.de
mailto:batzeck@firma.de ✓

Abteilung Management

Funktion Manager

... opens the appropriate internal mail address.

Mailer

DRAFTS (0/0)
INBOX (17/46)
SCHEDULED (0/0)
SENT (0/444)

InternalRecipients

ExternalRecipients

Attachments

Scheduled

Subject

Text

References

Griffith Jean

MailFolder DRAFTS

DRAFTS (0/0)
INBOX (0/19)
Kunde (0/1)
SCHEDULED (0/0)
SENT (0/33)

Empfänger

☒ [1] Batzeck Klaus

Geplante Zeit

Betreff

Text

Verweise

Ordner DRAFTS

DRAFTS

Im Reiter "Sonstiges" können für den Mitarbeiter noch die Kostenstelle, die Ver- und Berechnungssätze, Kapazitäten und weitere Angaben definiert werden.

Mitarbeiter Batzeck Klaus

01 - Paßwort setzen

Stammblatt Adresse Kommunikation **Sonstiges** Alle

Interner Schlüssel	6	
Kostenstelle		
Verrechnungssatz 1		EUR
Verrechnungssatz 2		EUR
Berechnungssatz		EUR
Monatsgehalt		EUR
Jahresgehalt		EUR
Anzahl Monatsgehälter		
Geburtstag		
Einstellung		
Max. Kapazität	100	%
Max. Arbeitszeit	100	%
Überstundenkonto		h
Urlaubskonto		d
Gleitzeit		h
Sonderstunden		h
Ausbezahlte Zeit		h
Buchungsdatum Überstunden		
Buchungsdatum Urlaub		
Buchungsdatum Gleitzeit		
Buchungsdatum Sonderstunden		

1)



From:
<https://infodesire.net/dokuwiki/> - Projectile-Online-Handbuch

Permanent link:
https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_3:3.11.06_verwaltung_von_mitarbeitern&rev=1259239750

Last update: 2019/10/25 14:09

