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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' field is checked, and the 'Login' field contains the value 'klaus'. The 'Standard-Benutzerrolle' field is set to '2 Manager'.

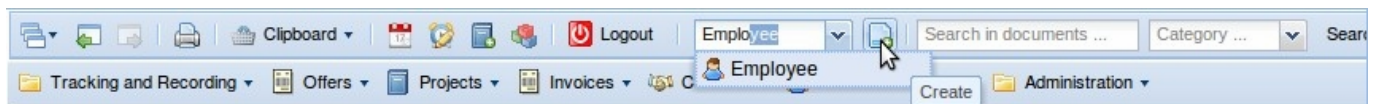
Required fields: Employee, user group, login, employee status, location, salutation, name, max. capacity, max. working hours

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. The 'Master data' section includes fields for 'Personell ID', 'Anrede' (dropdown), 'Titel' (dropdown), 'Name' (text), and 'First name' (text). The 'Status' section includes 'Status' (dropdown, set to 'Fixed') and 'Function' (dropdown). The 'Branch' section includes 'Branch' (dropdown, set to 'Frankfurt') and 'Cost center' (dropdown). The 'Unit' section includes a 'Unit' dropdown set to 'No entries'. The 'Active user' section includes a checked 'Active user' checkbox. The 'Login' section includes a 'Login' text field. The 'Default user role' section includes a 'Default user role' dropdown and a search icon. The 'Benutzersprache' section includes a '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:

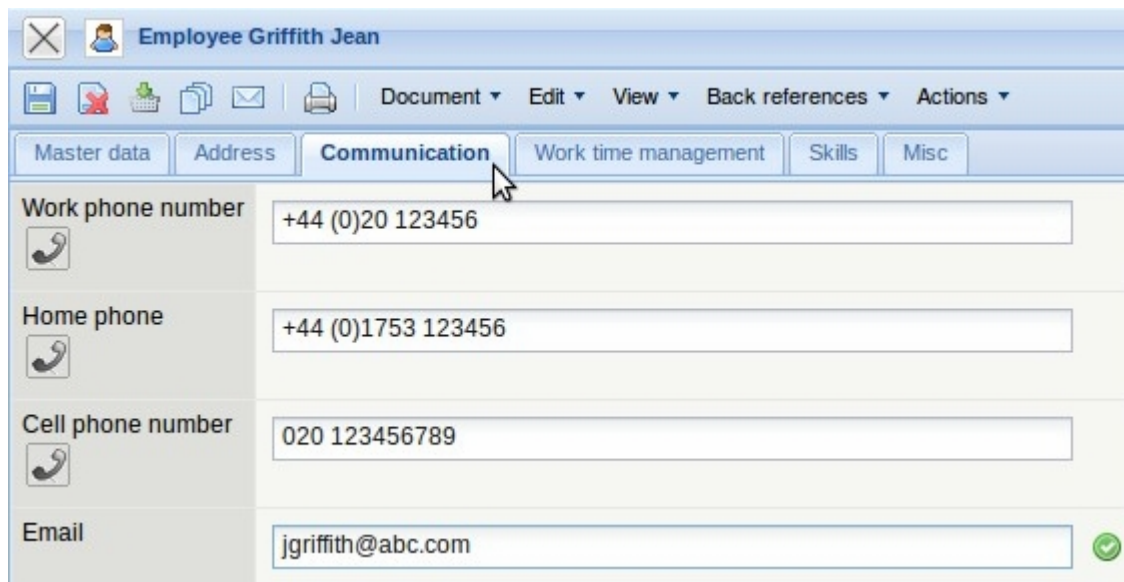
- Personell ID:** 12345
- Anrede:** Misses
- Titel:** (empty)
- Name:** Griffith
- First name:** Jean
- Status:** Fixed
- Function:** Consultant
- Branch:** London
- Cost center:** Marketing
- Unit:** A table with 1 row: 1 Marketing and Sales
- Active user:** ☒
- Login:** jean
- Default user role:**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

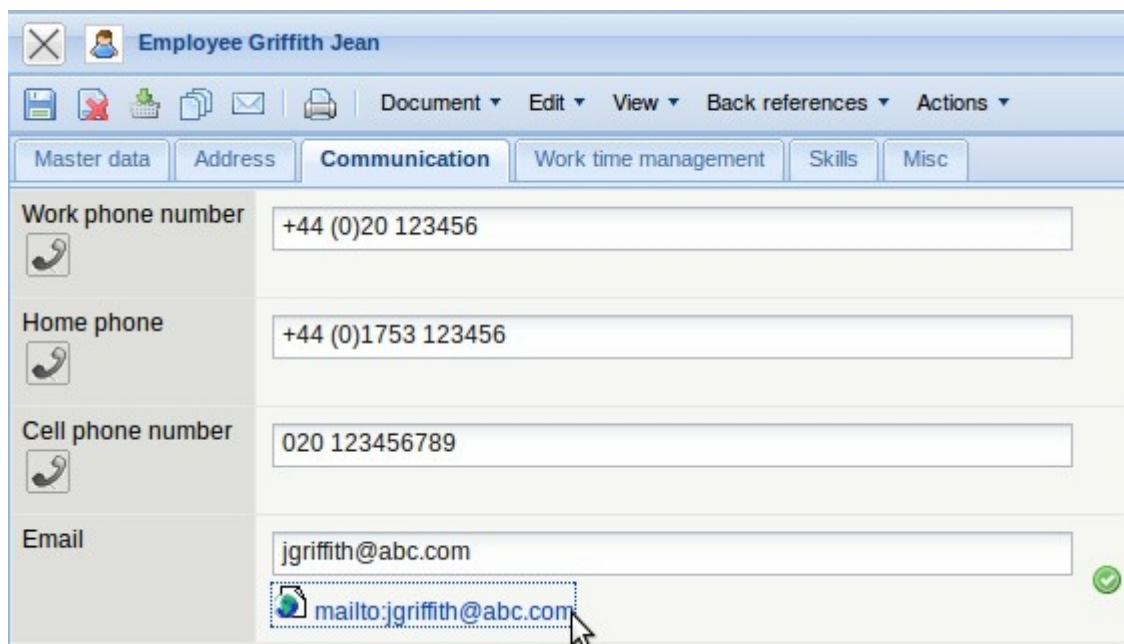
Home phone +44 (0)1753 123456

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

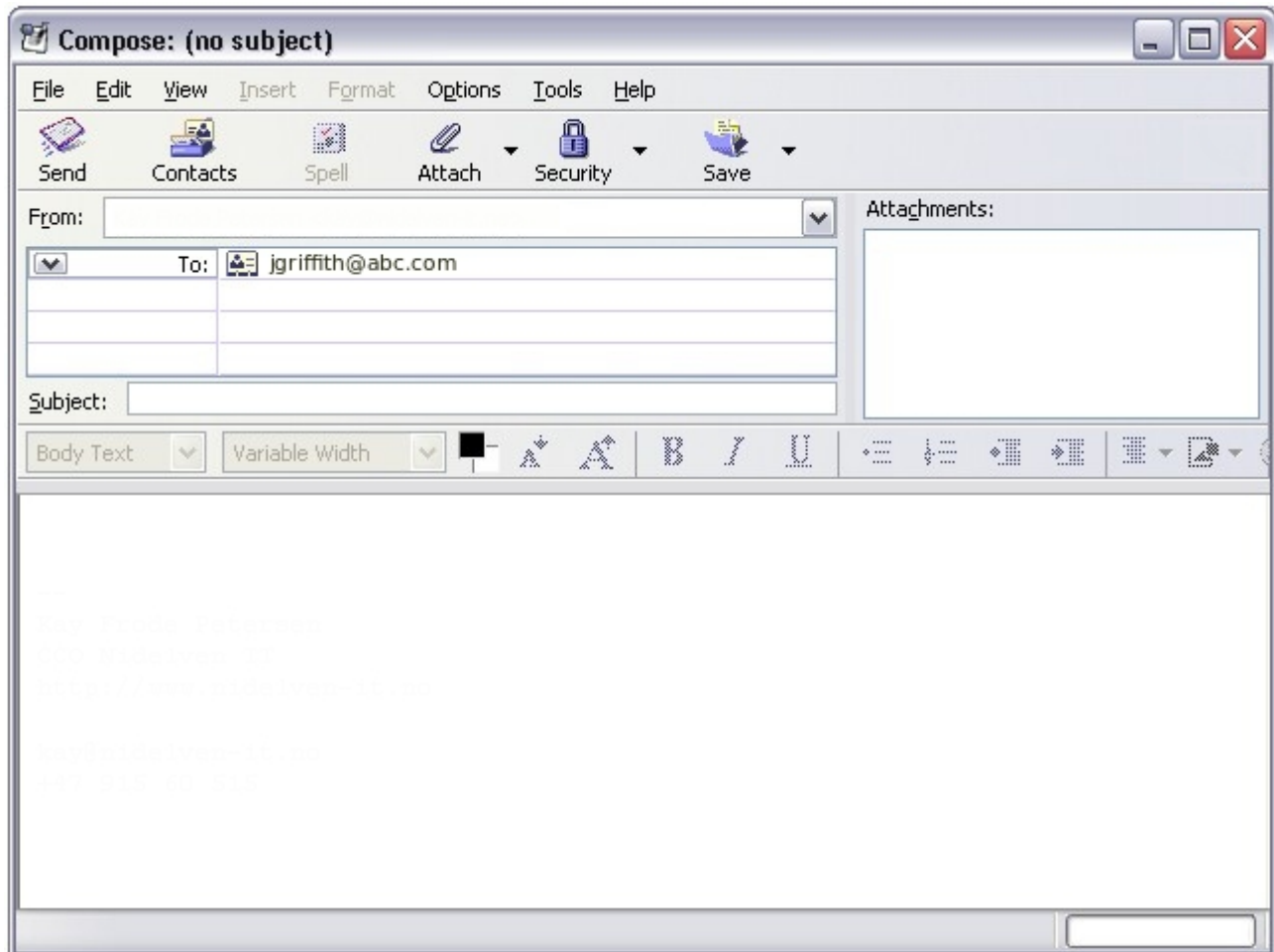
Home phone +44 (0)1753 123456

Cell phone number 020 123456789

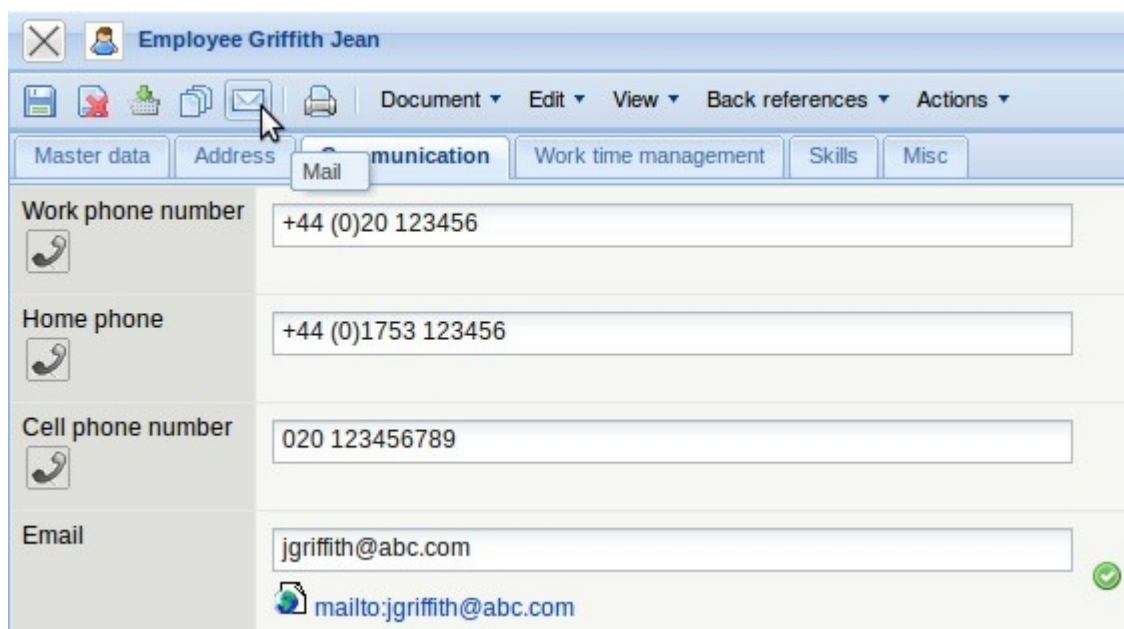
Email jgriffith@abc.com

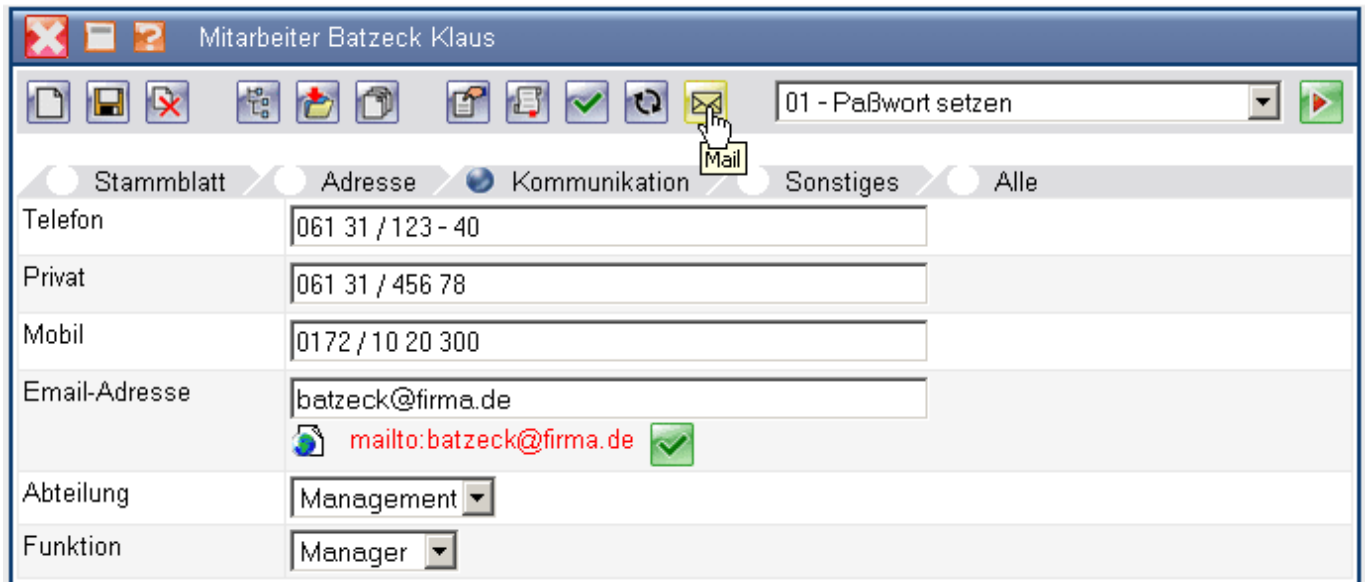
<mailto:jgriffith@abc.com>

... 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

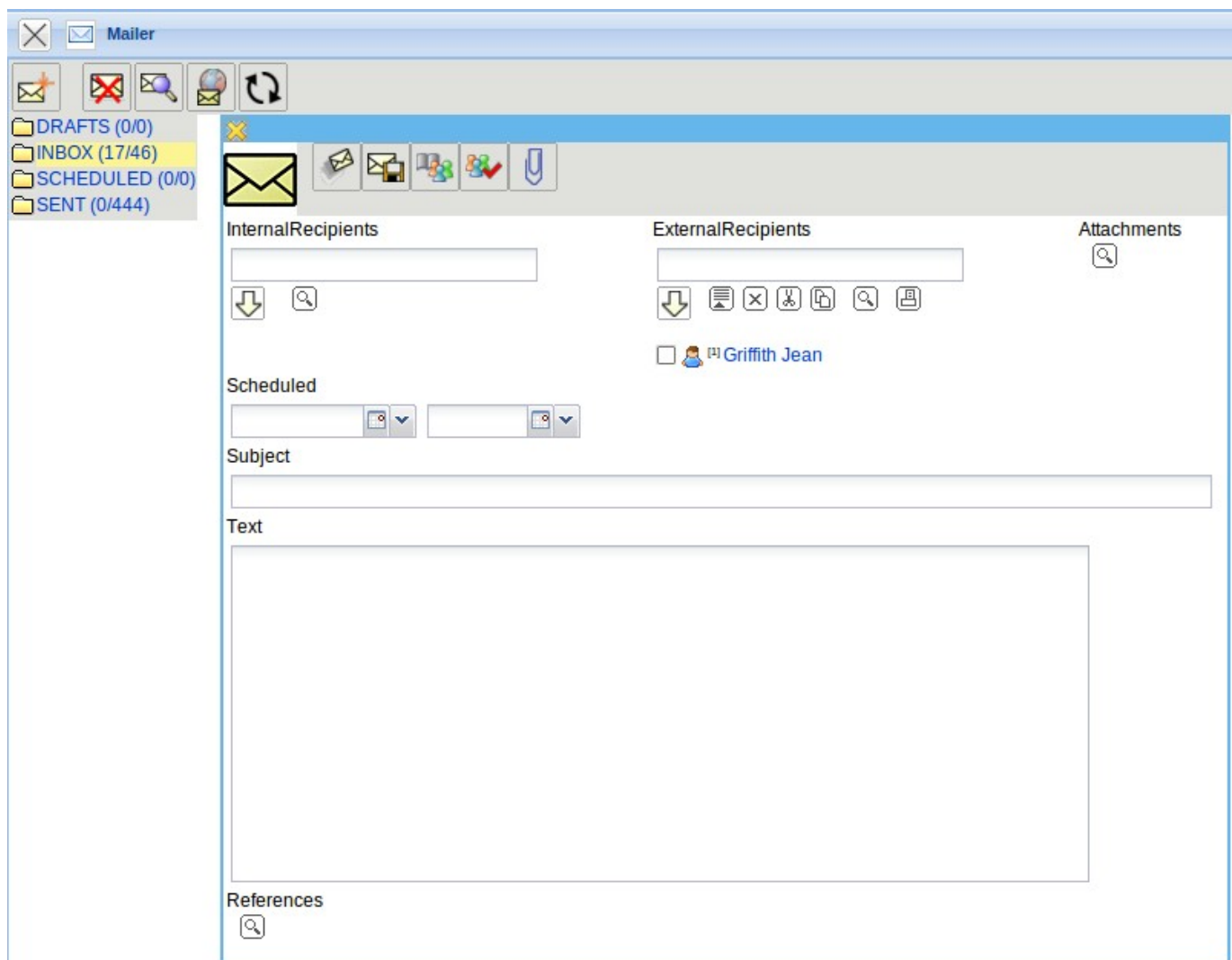
Mobil 0172 / 10 20 300

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

On the “work time management” tab, the maximum project capacity, employment capacity, date hired, time tracking limit and contract for the employee can be defined and displayed here.

The screenshot shows the 'Work time management' tab for 'Employee Griffith Jean'. The interface includes a toolbar with icons for saving, deleting, adding, and printing, along with menu options: Document, Edit, View, Back references, and Actions. Below the toolbar are tabs for Master data, Address, Communication, Work time management (selected), Skills, and Misc. The main content area contains two rows of input fields: 'Maximum project capability' and 'Employment capacity', both set to '100 %'. Below these are 'Date hired' and 'Austritt' (departure) fields, each with a calendar icon. Further down are 'Time tracking limit' and 'Previous time tracking limit' fields, also with calendar icons. At the bottom, the 'Employment contracts' section shows a gear icon and a dropdown menu with 'No entries'.

On the “skills” tab professional skills, soft skills and language skills of the employee can be defined.

The screenshot shows the 'Skills' tab for 'Employee Griffith Jean'. The interface is similar to the previous one, with the same toolbar and tabs. The 'Skills' tab is selected, and the main content area is divided into three sections: 'Professional skills', 'Soft skills', and 'Language skills'. Each section has a search icon (magnifying glass) and a dropdown menu. Below the 'Soft skills' and 'Language skills' sections, there are additional icons for adding (downward arrow) and searching (magnifying glass) skills.

On the “Misc” tab, meetings can be entered, and further information can be defined.

Employee Griffith Jean

Document ▾ Edit ▾ View ▾ Back references ▾ Actions

Master data

Address

Communication

Work time management

Skills

Misc

Internal ID

6

Date of birth

Meetings

No entries ▾

Note

Candidate

1)

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