

[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 employee data. The title bar indicates the user is 'Employee Jones Timothy'. The form is organized into tabs: Master data, Address, Communication, Work time management, Skills, and Misc. The 'Master data' tab is active. The form contains several sections:

- Personell ID:** A text field containing '124'.
- Anrede (Salutation):** A dropdown menu set to 'Mister'.
- Titel (Title):** An empty dropdown menu.
- Name:** A text field containing 'Jones'.
- First name:** A text field containing 'Timothy'.
- Status:** A dropdown menu set to 'Fixed'.
- Function:** A dropdown menu set to 'Developer'.
- Branch:** A dropdown menu set to 'London'.
- Cost center:** A dropdown menu set to 'Development'.
- Unit:** A section with a table listing units. The table has two rows: '1 Cambridge' and '2 Marketing and Sales'. Above the table is a pagination bar showing 'page 1 of 1'.
- Active user:** A checkbox that is checked.
- Login:** A text field containing 'timothy'.
- Default user role:** A dropdown menu set to '4 Employee'.
- Benutzersprache (User language):** A dropdown menu set to 'English'.

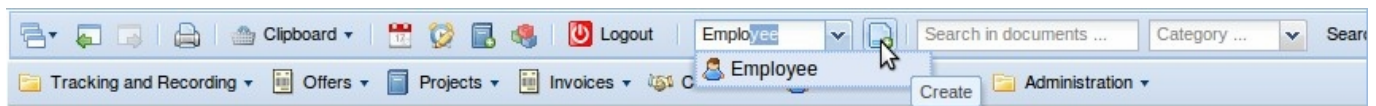
Required fields: Employee, user group, login, employee status, location, salutation, name, max. capacity, max. working hours

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 'Unit' (dropdown, set to 'No entries'). The 'Active user' section includes 'Active user' (checkbox, checked), 'Login' (text), '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 . 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:

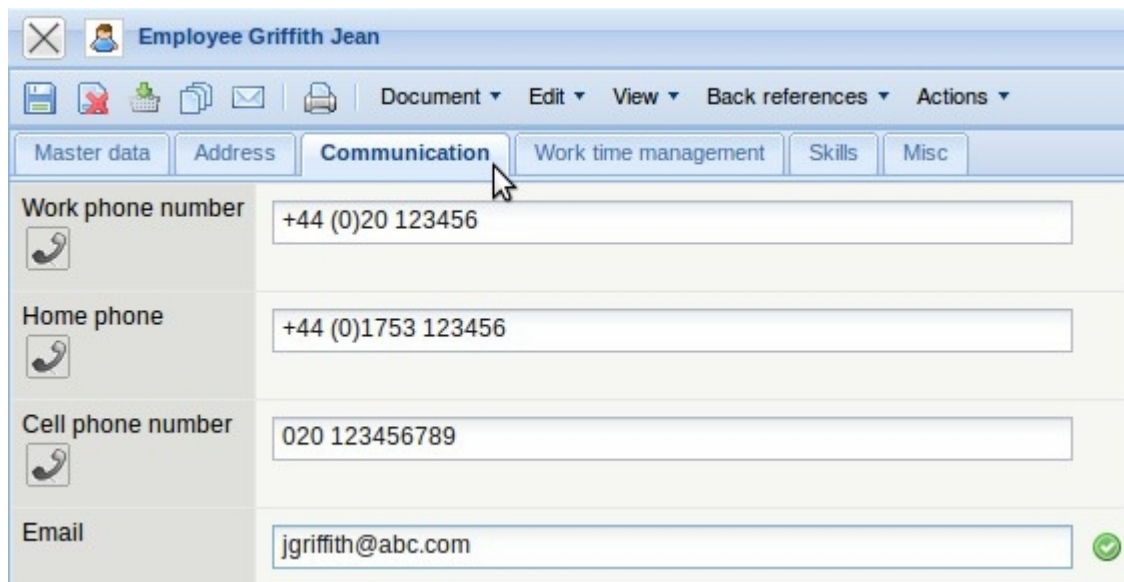
- Personell ID:** 12345
- Anrede:** Misses
- Titel:** (empty)
- Name:** Griffith
- First name:** Jean
- Status:** Fixed
- Function:** Consultant
- Branch:** London
- Cost center:** Marketing
- Unit:** A table with 1 row: 1 Marketing and Sales
- Active user:** ☒
- Login:** jean
- Default user role:**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

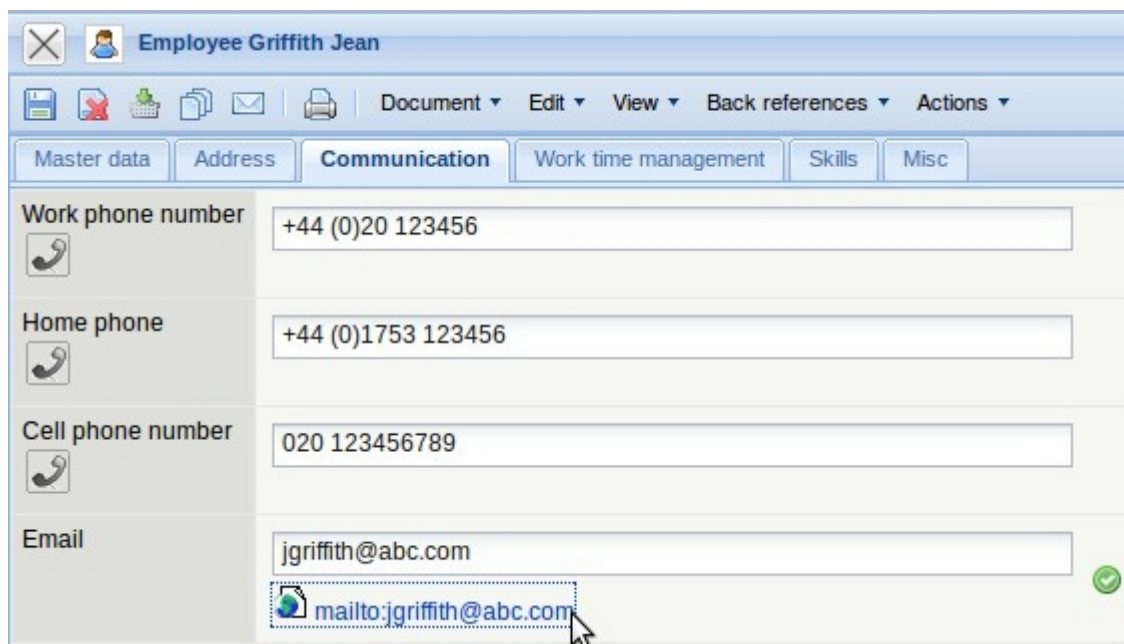
Home phone +44 (0)1753 123456

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

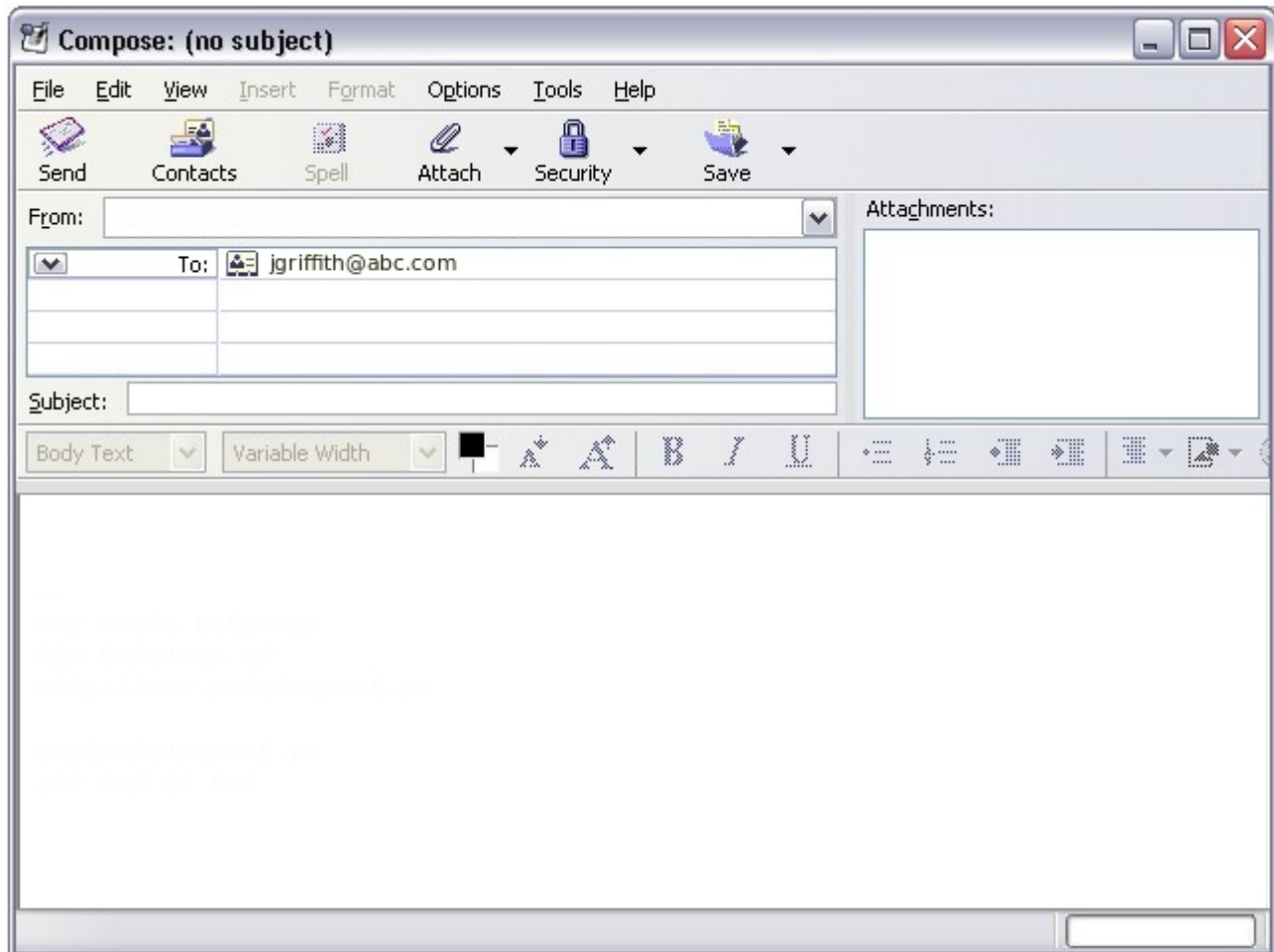
Home phone +44 (0)1753 123456

Cell phone number 020 123456789

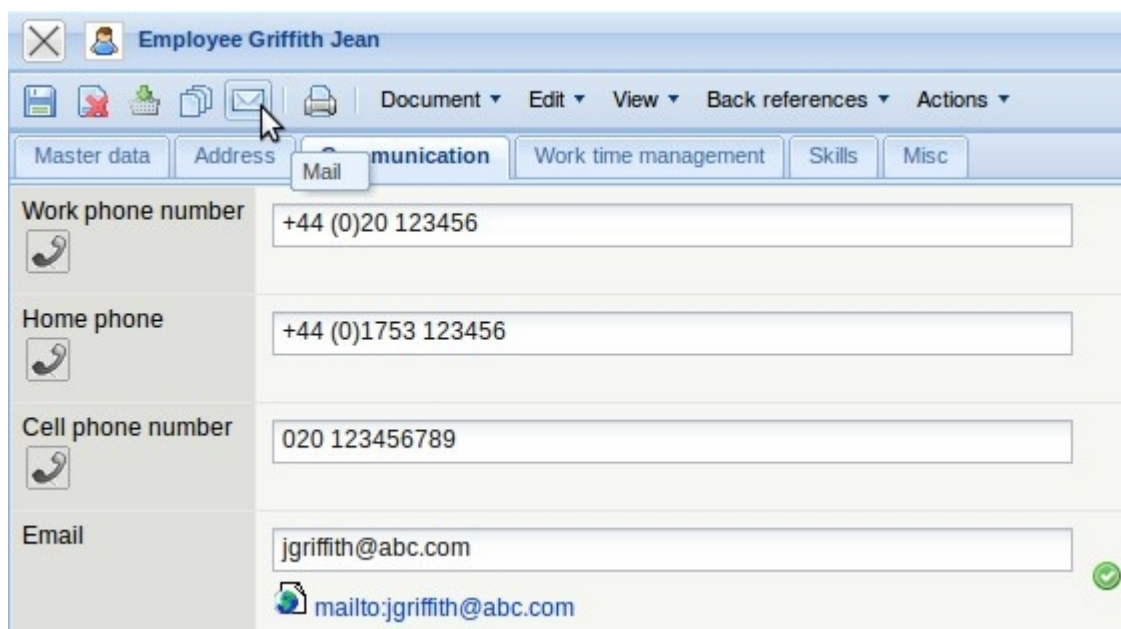
Email jgriffith@abc.com

<mailto:jgriffith@abc.com>

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



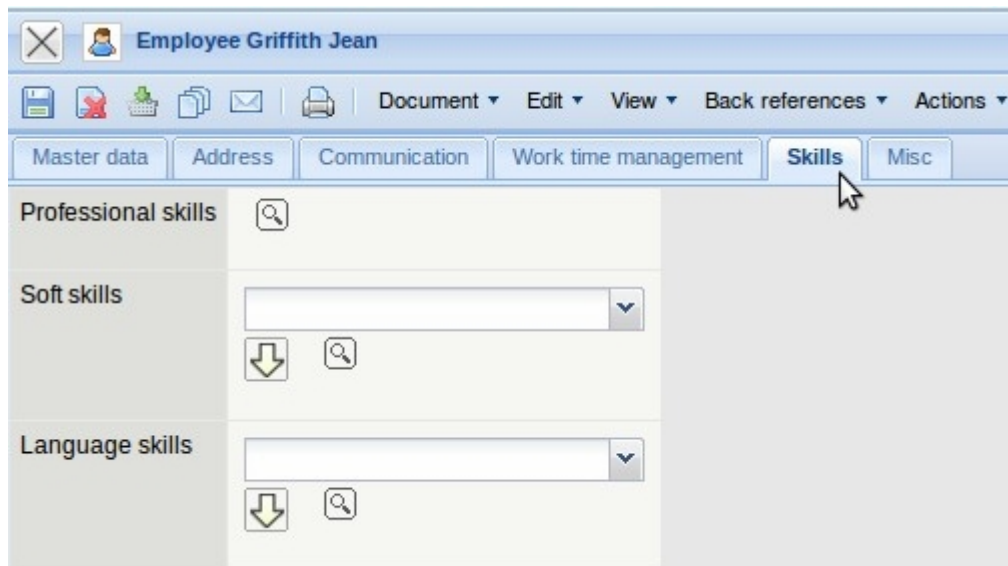
If the optional mail system [mailer](#) is used, clicking the mailer in the function bar ...



... opens the appropriate internal mail address.

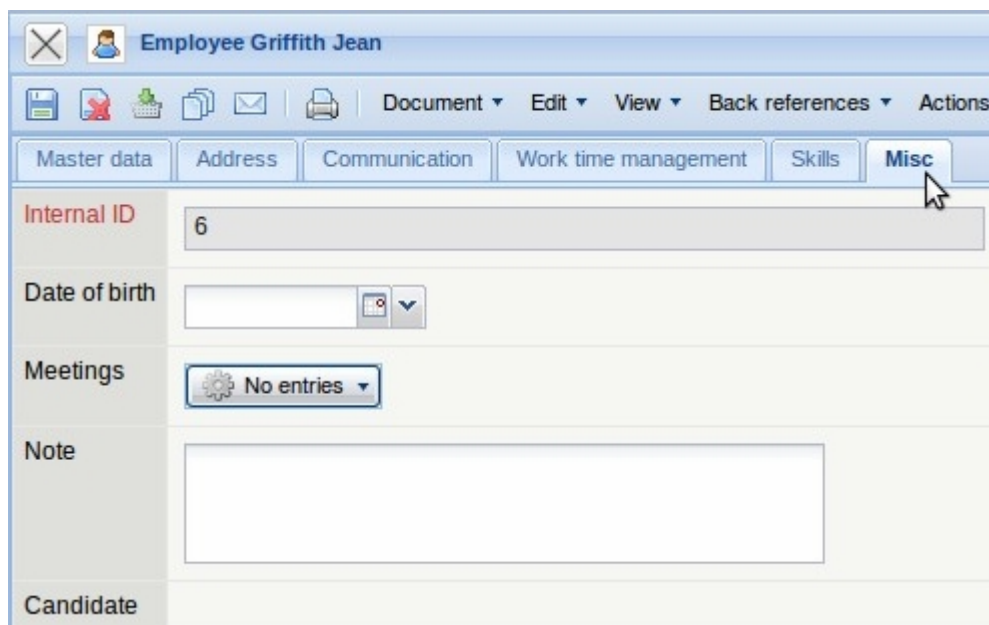
On the “work time management” tab, the maximum project capacity, employment capacity, date hired, time tracking limit and contract for the employee can be defined and displayed here.

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



The screenshot shows the 'Skills' tab of the 'Employee Griffith Jean' record. The interface includes a top menu bar with options like 'Document', 'Edit', 'View', 'Back references', and 'Actions'. Below the menu are tabs for 'Master data', 'Address', 'Communication', 'Work time management', 'Skills', and 'Misc'. The 'Skills' tab is active, displaying sections for 'Professional skills', 'Soft skills', and 'Language skills'. Each section has a search icon and a dropdown menu. A mouse cursor is pointing at the 'Skills' tab.

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



The screenshot shows the 'Misc' tab of the 'Employee Griffith Jean' record. The interface is similar to the previous one, but the 'Misc' tab is active. It displays fields for 'Internal ID' (value: 6), 'Date of birth' (with a calendar icon), 'Meetings' (with a dropdown menu showing 'No entries'), 'Note' (with a text area), and 'Candidate'. A mouse cursor is pointing at the 'Misc' tab.

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=1259243206

Last update: 2019/10/25 14:09

