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3.11.07 Working Time Administration (continued)

Administering Accounts

After defining the employee contracts, the working time administration is ready for use. The corresponding data for time accounts (working hours, holidays, special hours) are taken from the working time recording. The information from work time recording uses the conditions of the valid employee contracts by using the action "Create time booking", which can be recorded at any given time.

In the following example, the time and vacation account of the employee Jean Griffith is edited. The employee was hired on 02.11.2009 and has entered the following times up to 16.11.2009 (or entered from another person when absent):

Occupation chart										
Employee Griffith Jean										
Date	Times	Project	Job	Job time[h]	Job time[Pd]	Estimated working time[h]	Working time[h]	Difference[h]	Working time[Pd]	Difference[Pd]
02.11.2009	08:00-16:00	6 QM-Module	6-2 Customizing	8,00	1,60	7,70	8,00	0,30	1,60	0,06
03.11.2009	08:00-15:30	6 QM-Module	6-3 QM-Module	7,50	1,50	7,70	7,50	-0,20	1,50	-0,04
04.11.2009			Illness			7,70	8,00	0,30	1,60	0,06
05.11.2009			Illness			7,70	8,00	0,30	1,60	0,06
06.11.2009	08:00-16:30	6 QM-Module	6-3 QM-Module	8,50	1,70	7,70	8,50	0,80	1,70	0,16
09.11.2009			Holiday			7,70	7,70	0,00	1,54	0,00
10.11.2009			Holiday			7,70	7,42	-0,28	1,48	-0,06
11.11.2009			Holiday			7,70	7,70	0,00	1,54	0,00
12.11.2009	08:00-17:00	6 QM-Module	6-3 QM-Module	9,00	1,80	7,70	9,00	1,30	1,80	0,26
13.11.2009	08:30-13:00	6 QM-Module	6-3 QM-Module	4,50	0,90		4,50		0,90	
	13:30-17:00	6 QM-Module	6-4 QM-Module 5.50	3,50	0,70	7,70	3,50	0,30	0,70	0,06
16.11.2009	08:00-14:30	7 Update Projectile	7-2 QM Management	6,50	1,30	7,70	6,50	-1,20	1,30	-0,24
Total				47,50	9,50	84,70	86,32	1,62	17,26	0,32

After activating the action "Recalculate time accounts" the dialog ...

Employee Griffith Jean

Document Edit View Back references Actions

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

Maximum project capability 100 % Employment capacity 100 %

Date hired 03.11.2009 Employment end date

Overtime account h

Vacation account d

Flexible work time h

Date booking overtime

Date booking holiday

Date booking flexible time

Time tracking limit

Previous time tracking limit

Employment contracts

	Employee contract ID	Employee	Contract begin	Contract end
1	6-1	Griffith Jean	01.08.2009	30.11.2009
2	6-2	Griffith Jean	01.12.2009	

Actions:

- 01 - Set password
- 02 - Add contract
- 03 - Create time booking
- 05 - Recalculate time accounts
- 07 - Display time bookings
- 08 - Generate report data
- ShowInitiatedWorkflows
- ShowUserPrefs

opens.

Recalculate times

all

Date 30.11.2009

Perform

The date to be used for the recalculation is entered and after clicking "perform" the calculation is newly performed.

Recalculate times

all

Date: 30.11.2009

Perform

November 2009

S	M	T	W	T	F	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Today

In the example: The employee Jane Conner (contract begin on 03.11.2009) has 28 days of vacation per year, no remaining vacation and one day of vacation recorded in the system.

The state of the vacation account for 03.11.2009 amounts to 8 days. The employee has accumulated 1,3 hours of overtime and no special hours up to the given deadline, i.e. the difference of the actual working hours between 03.11.2009 and 30.11.2009 is greater than the planned working time of the employee.

In the working hours administration, Projectile determines the target time of the employee, taking the defined [holidays](#), the [calendar](#) and the deviations from the contracts into account.

Employee Griffith Jean

Document Edit View Back references Actions

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

Maximum project capability: 100 % Employment capacity: 100 %

Date hired: 03.11.2009 Employment end date:

Overtime account: 0 h

Vacation account: 8 d

Flexible work time: 1,3 h

Date booking overtime: 30.11.2009

Date booking holiday: 30.11.2009

Date booking flexible time: 30.11.2009

Time tracking limit:

Previous time tracking limit:

Employment contracts

	Employee contract ID	Employee	Contract begin	Contract end
1	6-1	Griffith Jean	01.08.2009	30.11.2009
2	6-2	Griffith Jean	01.12.2009	

Note: After these entries are performed the time cannot be recorded for days before or on the posting date in TimeTracker or absence recording. If the time must be entered for the individual employees after these times have been posted, the time account for the employee must be deleted. After the new times entries have been completed, posting can be recalculated once again.

The working time administration is equivalent to a book entry system, which determines the account balance from the contract data and the tracking and recording data. Posting between the two accounts can be performed here. This function is used for example, by payment of vacation entitlement or overtime. Using the action "create time booking" ...

The screenshot shows the 'Employee Griffith Jean' interface. The 'Work time management' tab is active. The 'Actions' menu is open, showing options: 01 - Set password, 02 - Add contract, 03 - Create time booking (highlighted), 05 - Recalculate time accounts, 07 - Display time bookings, 08 - Generate report data, ShowInitiatedWorkflows, and ShowUserPrefs. The main form displays fields for 'Maximum project capability' (100%), 'Employment capacity' (100%), 'Date hired' (03.11.2009), 'Employment end date', 'Overtime account' (0 h), and 'Vacation account' (8 d).

... the appropriate dialog is opened.

The screenshot shows the 'Employee timeaccount change' dialog box. It displays the current balance: 'Flexible time' (1,3 h) and 'Vacation' (7,0 d). The 'all' tab is selected. The form includes fields for 'Booking date', 'Amount time' (0 h), 'AmountTimeDays' (0 d), 'From account' (dropdown), 'To account' (Flexible time), 'Employee' (Griffith Jean), and a 'Note' field. At the bottom are 'Perform' and 'Cancel' buttons.

In the following example, an employee is paid 1 overtime hour on 01012009. This amount must then be debited from the flexible time account.

Neue Zeitbuchung

Gleitzeit 1.3 h
Urlaub 18.5 d

Buchungsdatum 20.05.2004

Zeitumfang (Stunden) 1 h

Zeitumfang (Tage) 0 d

Quell-Konto Gleitzeit

Ziel-Konto Ausbezahlte Zeit

Mitarbeiter Batzeck Klaus

Bemerkung

Ausführen Abbrechen

After clicking “Perform”, the flexible time account is reduce from 000 hours to 000 hours.

Mitarbeiter Batzeck Klaus

03 - Zeitbuchung hinzufügen

Stammblatt
Adresse
Kommunikation
Sonstiges
Alle

Interner Schlüssel	6
Kostenstelle	Geschäftsführung ▾
Verrechnungssatz 1	55,00 EUR
Verrechnungssatz 2	EUR
Berechnungssatz	EUR
Monatsgehalt	6.000,00 EUR
Jahresgehalt	72.000,00 EUR
Anzahl Monatsgehälter	12
Geburtstag	23.04.1977
Einstellung	01.05.2004
Max. Kapazität	50 %
Max. Arbeitszeit	100 %
Überstundenkonto	0 h
Urlaubskonto	18,5 d
Gleitzeit	0,3 h
Sonderstunden	0 h
Ausbezahlte Zeit	1 h
Buchungsdatum Überstunden	20.05.2004
Buchungsdatum Urlaub	20.05.2004
Buchungsdatum Gleitzeit	20.05.2004
Buchungsdatum Sonderstunden	20.05.2004
Rückfassungsgrenze	
Bank	
Verträge	

[1] 6-1 Batzeck K...04 31.10.2004
[2] 6-2 Batzeck Klaus 01.11.2004

The individual posting can be displayed using the action “Display time booking” in ...

Mitarbeiter Batzeck Klaus

07 - Mitarbeiterzeitbuchungen anzeigen  Aktion ausführen

Stammblatt Adresse Kommunikation Sonstiges Alle

Interner Schlüssel 6

Kostenstelle Geschäftsführung

Verrechnungssatz 1 55,00 EUR

Verrechnungssatz 2 EUR

Berechnungssatz EUR

Monatsgehalt 6.000,00 EUR

Jahresgehalt 72.000,00 EUR

Anzahl Monatsgehälter 12

Geburtstag 23.04.1977  

Einstellung 01.05.2004  

Max.Kapazität 50 %

Max.Arbeitszeit 100 %

Überstundenkonto 0 h

Urlaubskonto 18,5 d

Gleitzzeit 0,3 h

... a return list.

Collection 23.12.2009 16:49:04

Collection Edit file Report

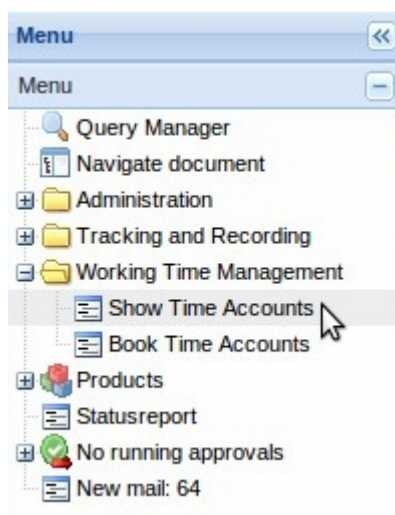
page 1 of 1

	Employee	Description	Erfassungsdatum
1	Employee Griffith Jean	Contract vacation startup	23.12.2009 14:02:43
2	Employee Griffith Jean	Tracked SpecialTime till 31.08.2009	23.12.2009 14:02:43
3	Employee Griffith Jean	Tracked FlexibleTime till 31.08.2009	23.12.2009 14:02:43
4	Employee Griffith Jean	Tracked FlexibleTime till 30.09.2009	23.12.2009 14:02:43
5	Employee Griffith Jean	Tracked SpecialTime till 30.09.2009	23.12.2009 14:02:43
6	Employee Griffith Jean	Tracked FlexibleTime till 31.10.2009	23.12.2009 14:02:43
7	Employee Griffith Jean	Tracked SpecialTime till 31.10.2009	23.12.2009 14:02:43
8	Employee Griffith Jean	Vacation taken till 30.11.2009	23.12.2009 14:02:43
9	Employee Griffith Jean	Tracked SpecialTime till 30.11.2009	23.12.2009 14:02:43
10	Employee Griffith Jean	Tracked FlexibleTime till 30.11.2009	23.12.2009 14:02:43
11	Employee Griffith Jean	Booking Flexible time - PayedOffTime 30.11.2009	23.12.2009 16:48:24
12	Employee Griffith Jean	Booking Flexible time - PayedOffTime 30.11.2009	23.12.2009 16:48:24

Employee timeaccount change Griffith Jean Booking Flexible time - PayedOffTime 30.11.2009 23.12.2009 16:48:24	
Employee timeaccount change	1261583304051-0
Employee	Griffith Jean
Description	Booking Flexible time - PayedOffTime 30.11.2009
Erfassungsdatum	23.12.2009 16:48:24
Booking date	30.11.2009
Menge	1
Employee timeaccount change type	PayedOffTime
LinkedDocument	Griffith Jean Booking Flexible time - PayedOffTime 30.11.2009 23.12.2009 16:48:24
Note	

The account balance which refer to the accounts vacation, flexible time and special hours can be viewed centrally in a function. Each employee can check this data in the Time Tracker and thus has direct access to the remaining vacation entitlement and the overtime/undertime.

On the function bar in the menu item "Working Time Management", the functionalities "Show Time Accounts" and "Book Time Accounts" can be performed.



In the following example, for various selected employees,

Konten anzeigen

Ende: 25.09.2005

Mitarbeiter: [Empty]

Unit: [Empty]

Ausführen

... the account balance for 01012009 can be displayed.

Konten anzeigen

Ende: 25.09.2005

Mitarbeiter: [Empty]

Unit: [Empty]

Ausführen

☐ [1] Batzeck Klaus

☐ [2] Franke Helene

☐ [3] Tolker Jan

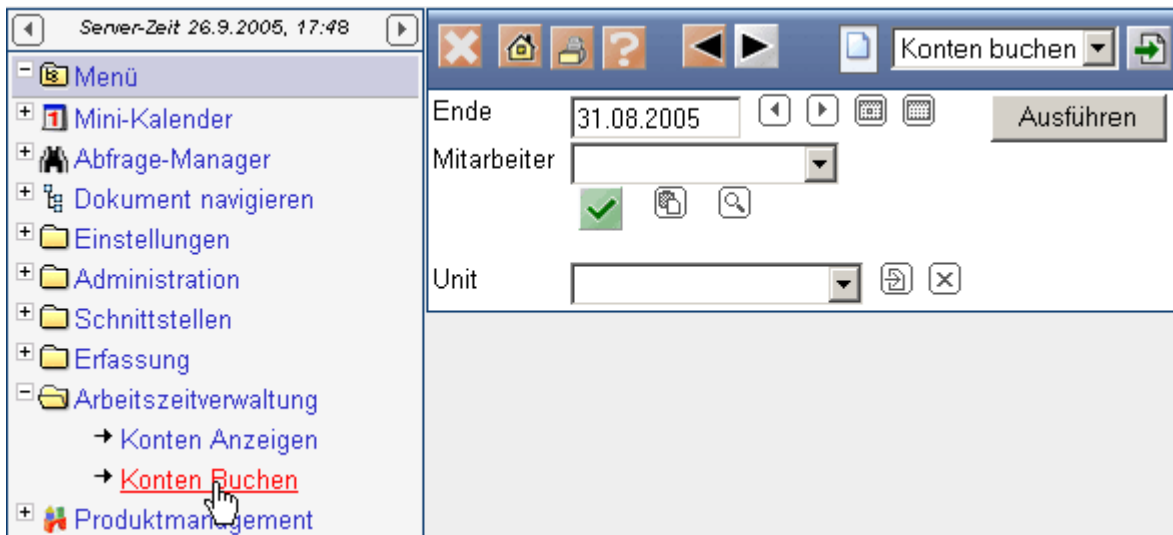
In the overview, the account balance for flexible time and vacation can be displayed for selected employees.

Zeitkonten Mitarbeiter

Mitarbeiter	Gleitzeit	Urlaub	Bemerkung
Tolker Jan	80,00	12,0	
Franke Helene	60,00	2,0	
Batzeck Klaus	-16,00	8,5	
	124,00	22,5	

Posting time accounts can also be performed centrally for all employees. Using the timed action service, all posting for the employees can be performed periodically and using the functionality 'book time accounts' posting can be performed manually.

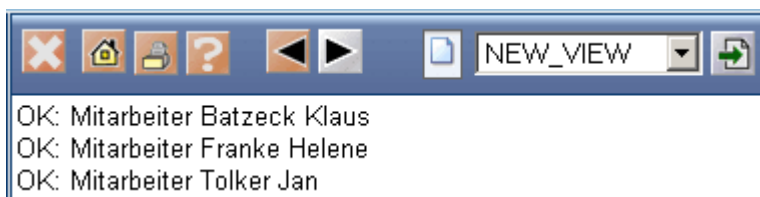
In the following example, posting for a selected employee is performed on 01012009.



After clicking the “Perform” button, a dialog for ...



the posting status of each employee is displayed.



Note: If the stored date in the calendar “vacation entitlement expires” is reached, the excess amount of the annual vacation entitlement is cut off (the appropriate posting is created and recorded). The procedure for overtime or special hours is the same for which the limit of the permitted maximum is exceeded.

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