

The integrated total solution for service providers: projects, processes, knowledge.

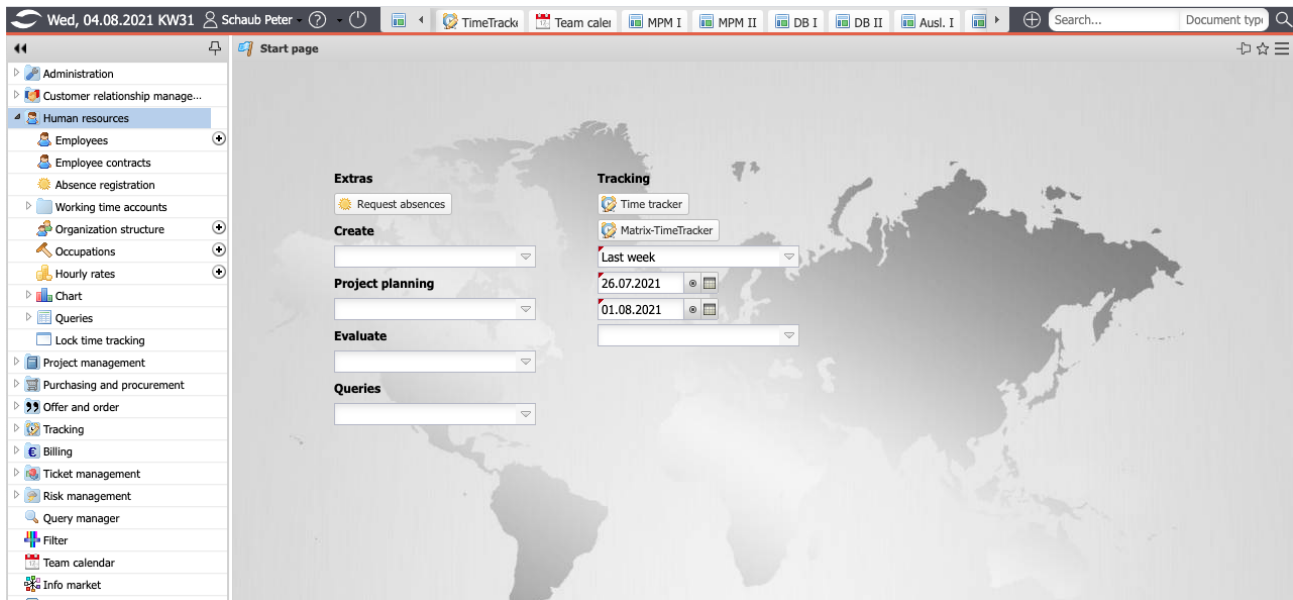
Help, Part 3: Personnel Management, HR

Table of Contents

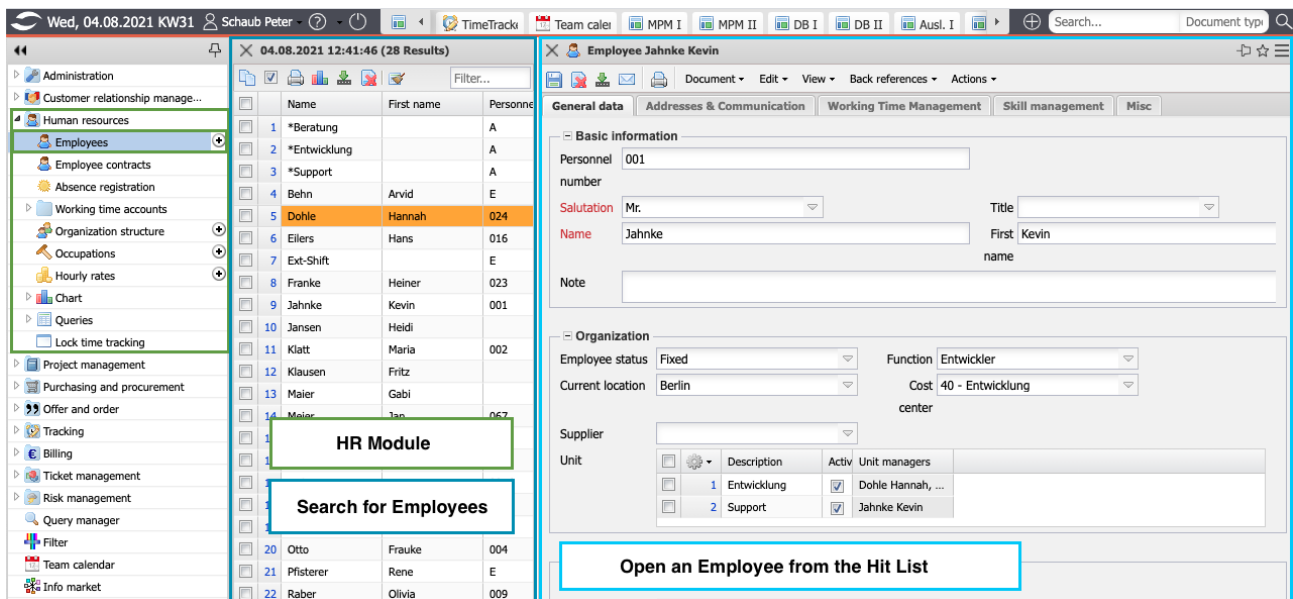
3.1 Personnel Management.....	2
3.2 Occupations.....	3
3.3 Employee.....	7
3.4 Employee Contract.....	10
3.5 Time Bookings.....	13
3.6 Units.....	16
3.7 External and Abstract Staff.....	17

3.1 Personnel Management

Personnel management refers to the orientation of a company towards its internal and external employees and the systematic design of the corresponding processes. The personnel management in Projectile consists of the masks "Activities", "Employees", "Employee Contract", "Bookings" and "Units".



The main menu "Personnel" contains, among other things, the entries for "Employees", "Employee Contracts", "Organizational Structure" and "Activities". Here the user can (depending on the authorisation) search in the existing personnel data, view, change and also delete data.



More information about the "User Interface" and "Search and Find" can be found in part 1 of the help.

3.2 Occupations

The occupations in Projectile are the basis for internal cost accounting, billing and, if necessary, resource planning. The internal and external hourly rates assigned to these activities serve as the basis for determining internal costs and billable activities.

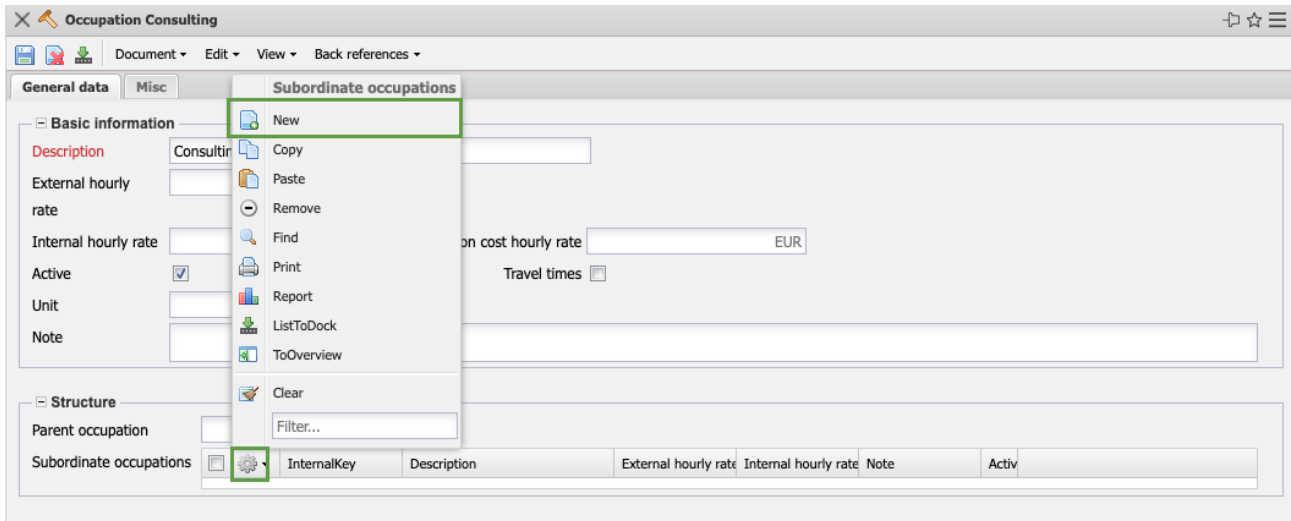
In the following example, a new activity is created, assigned internal and external hourly rates, and subdivided. After creating a new task ...

The screenshot shows the 'Occupation 2' form in a web browser. The left sidebar contains a navigation menu with categories like Administration, Human resources, and Project management. The 'Occupations' item is selected. The main form area is titled 'Occupation 2' and has tabs for 'General data' and 'Misc'. Under 'Basic information', the 'Description' field is empty. The 'External hourly rate' is set to 'EUR'. The 'Internal hourly rate' and 'Production cost hourly rate' are also set to 'EUR'. The 'Active' checkbox is checked, and the 'Travel times' checkbox is unchecked. The 'Unit' is set to a dropdown menu, and the 'Note' field is empty. Under 'Structure', the 'Parent occupation' is empty, and the 'Subordinate occupations' table is empty.

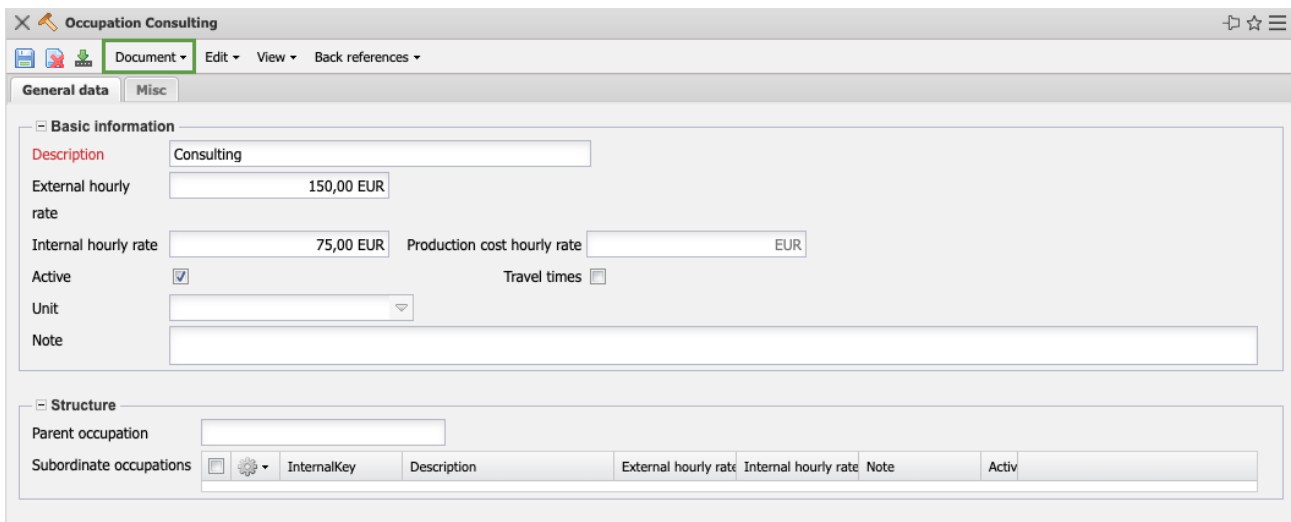
... the internal and external hourly rates are entered and the record is saved.

The screenshot shows the 'Occupation Consulting' form in the software interface. The left sidebar is the same as in the previous screenshot. The main form area is titled 'Occupation Consulting' and has tabs for 'General data' and 'Misc'. Under 'Basic information', the 'Description' field contains 'Consulting'. The 'External hourly rate' is set to '150,00 EUR'. The 'Internal hourly rate' is set to '75,00 EUR' and the 'Production cost hourly rate' is set to 'EUR'. The 'Active' checkbox is checked, and the 'Travel times' checkbox is unchecked. The 'Unit' is set to a dropdown menu, and the 'Note' field is empty. Under 'Structure', the 'Parent occupation' is empty, and the 'Subordinate occupations' table is empty.

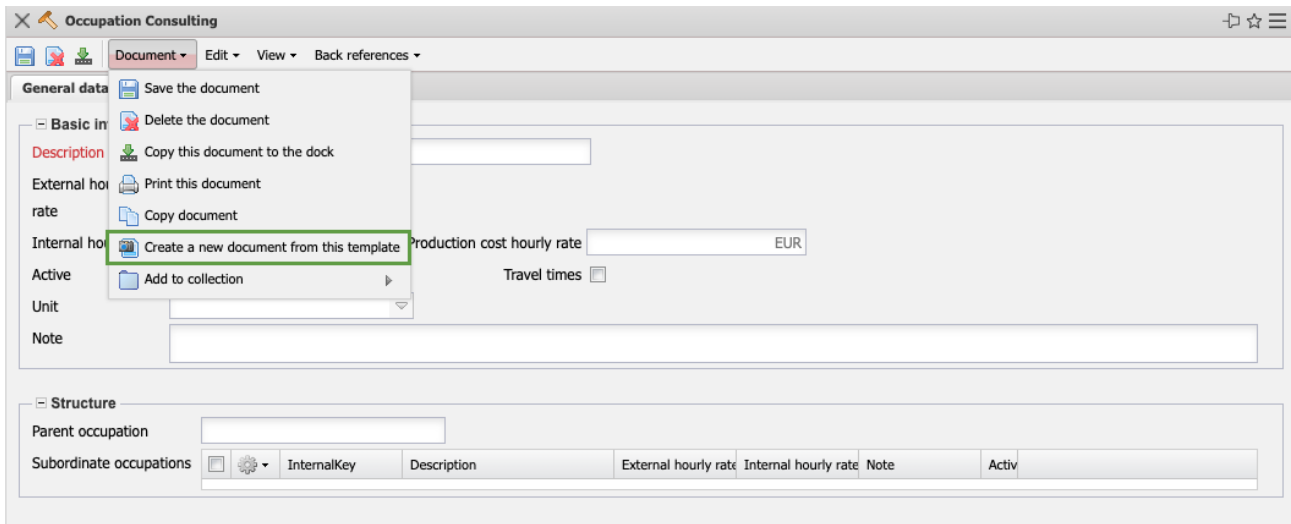
Occupations can also be further subdivided (for more detail). In the following example, the activity "Consulting" consists of three subordinate activities "Junior", "Senior" and "Manager". With the help of the functionality "New" in the field "Sub-activities" a subordinate activity is created, ...



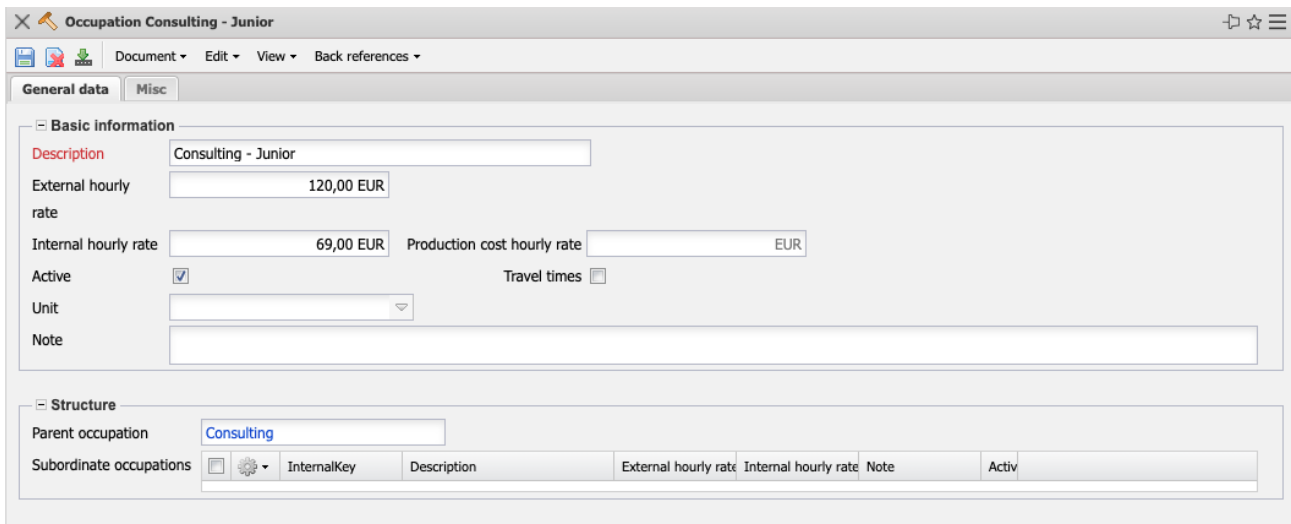
... filled out and saved. To create further subordinate activities, you can ...



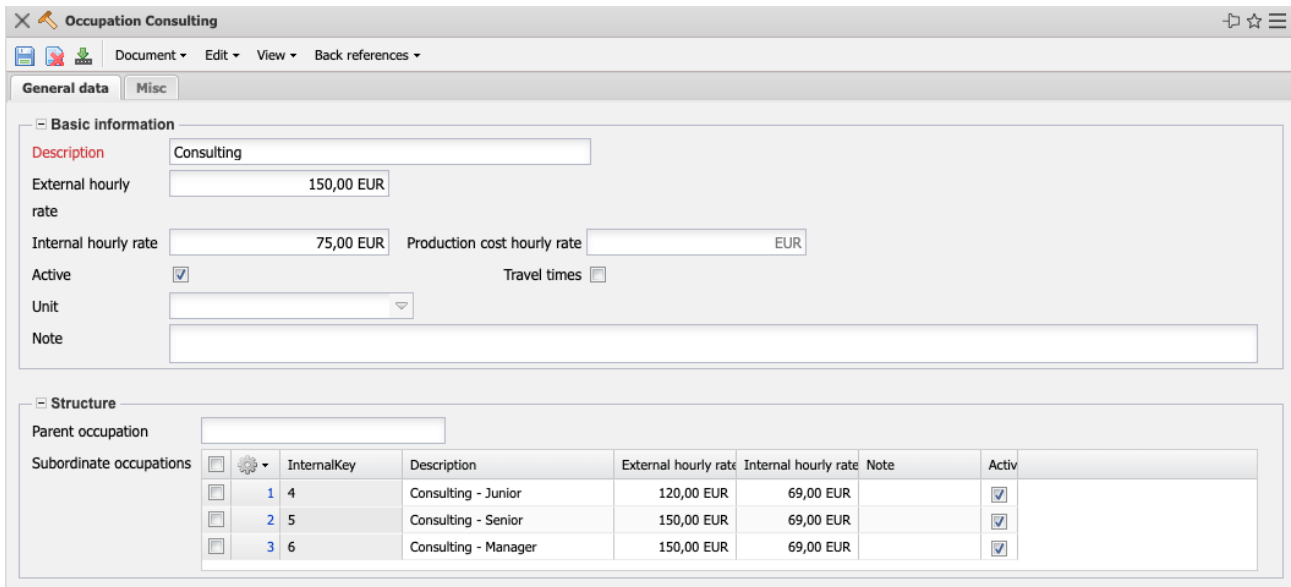
... the action "Duplicate Document" can be used. This action creates a duplicate on the same level.



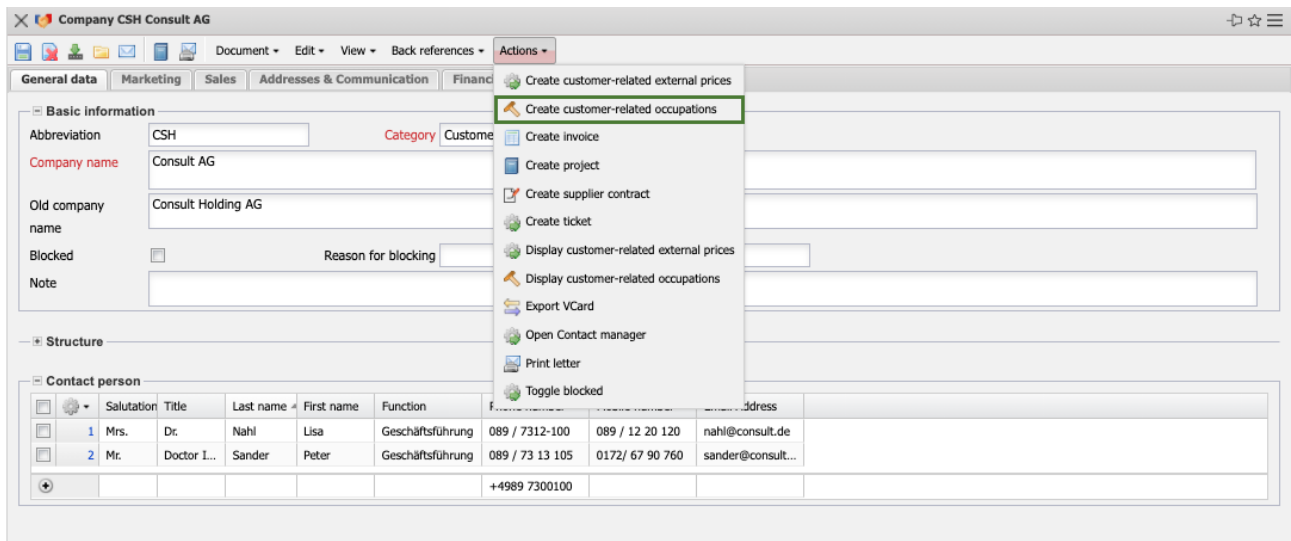
In this way, two duplicates of the subordinate activity and ...



... after closing the masks for the subordinate activities, the mask for the activity "Consulting" contains the three subordinate activities "Junior", "Senior" and "Manager" with the corresponding internal and external hourly rates.



The external hourly rates of activities can be overridden for defined customers and projects. This function is used if there are different allocation rates for individual customers:



Note: For individual projects, both the "standard" activities and the customer-related activities can be overridden using the "Project-wise activities" (see Part 5).

3.3 Employee

The employee administration in Projectile is used for internal employees (permanent staff), external employees (and/or freelancers) and so-called generic resources ("abstract employees"). Among other things, information about the employees, their authorizations in the system, cost rates and cost centers, overtime and vacation entitlements are managed here.

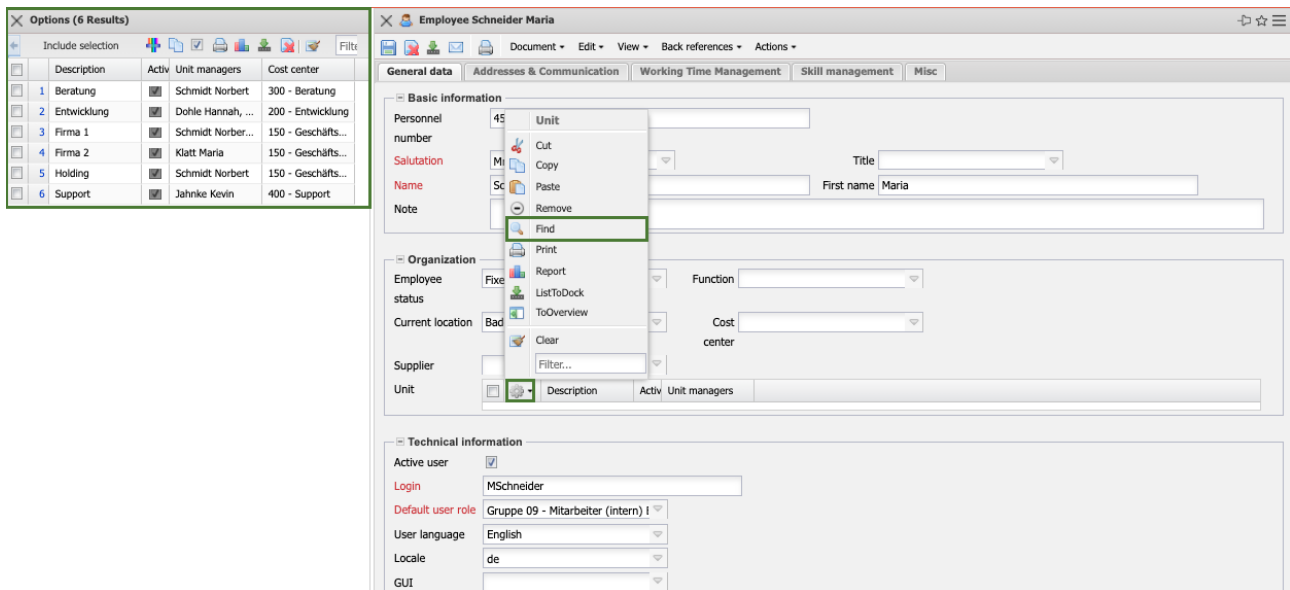
In the following example, a new employee is created, the organizational units and activities are assigned, and an employee contract is created.

The screenshot shows the 'Employee 35' form in the Projectile system. The form is divided into three main sections: Basic information, Organization, and Technical information. The Basic information section includes fields for Personnel number, Salutation, Title, Name, and First name. The Organization section includes fields for Employee status, Function, Current location, Cost center, Supplier, and Unit. The Technical information section includes fields for Active user, Login, Default user role, User language, Locale, and GUI.

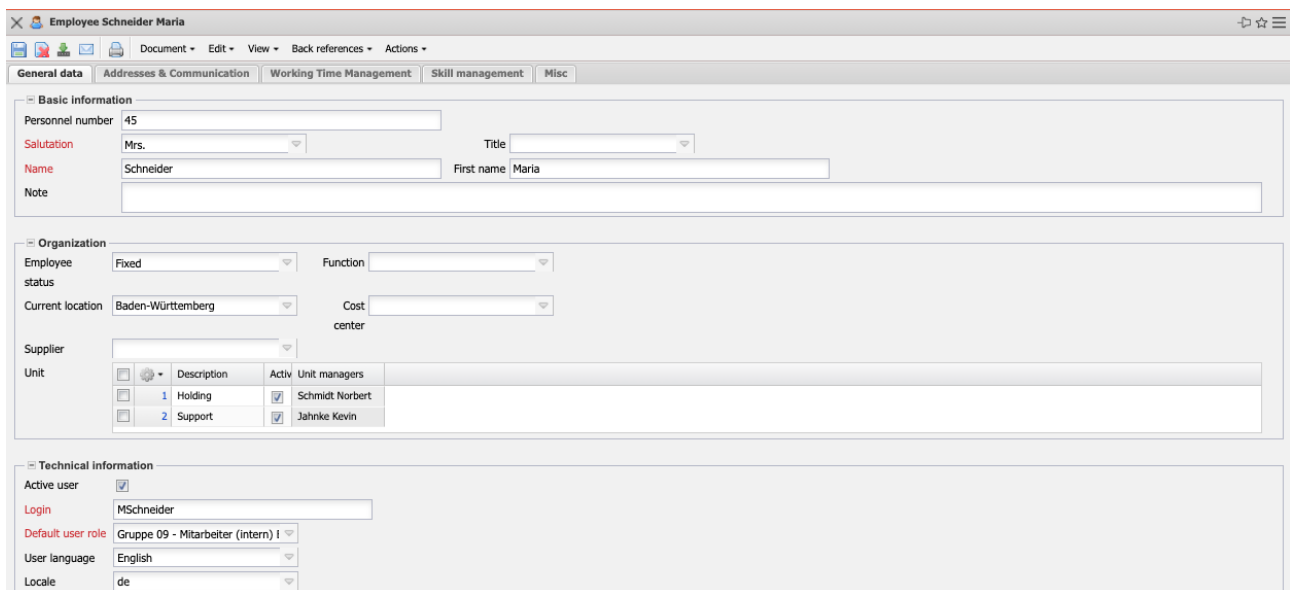
When all information has been entered on the "General Data Sheet" tab, the document is saved.

The screenshot shows the 'Employee Schneider Maria' form in the Projectile system. The form is divided into three main sections: Basic information, Organization, and Technical information. The Basic information section includes fields for Personnel number (45), Salutation (Mrs.), Title, Name (Schneider), and First name (Maria). The Organization section includes fields for Employee status (Fixed), Function, Current location (Baden-Württemberg), Cost center, Supplier, and Unit. The Technical information section includes fields for Active user (checked), Login (MSchneider), Default user role (Gruppe 09 - Mitarbeiter (intern) I), User language (English), Locale (de), and GUI.

In the example a new employee "Maria Schneider" is created. This employee is active (i. e. allowed to log on to the system) and receives the login "mschneider". The employee can then use this ID to log in to Projectile.



Any number of organizational units can be assigned to the employees after saving. This assignment is made using the "Find" action in the "Unit" field.



The assignment of the organizational unit(s) has not only informative character, but also direct influence on the authorization system. In the standard version of Projectile, the head of a unit can access "his" employees.

Further information can then be stored in the "Addresses & Communication" tab:

The "Working Time Management" tab will later be used for "Employee Contracts" (see Section 3.4) and in the "Skill Management" tab, activities for the suggestion system in Project Planning/Resource Planning can be stored, among other things. The assignment of the activities to the employee ...

	Description	External hourly rate	Internal hourly rate	Inter
1	Beratung	125,00 EUR		
2	Beratung - Junior	100,00 EUR		
3	Beratung - Senior	150,00 EUR		
4	Consulting	150,00 EUR		
5	Consulting - Junior	120,00 EUR		
6	Consulting - Manager	150,00 EUR		
7	Consulting - Senior	150,00 EUR		
8	Dokumentation	90,00 EUR		
9	Interne Tätigkeit	0,00 EUR		
10	Programmierung	105,00 EUR		
11	Programmierung - Datenbanken	100,00 EUR		
12	Programmierung - Java	120,00 EUR		
13	Programmierung - XML	90,00 EUR		
14	Project Management	150,00 EUR		
15	Schulung	125,00 EUR		
16	Support	90,00 EUR		
17	Testen	90,00 EUR		

... is done analogous to the procedure of the unit assignment (field "Activities" - "Find" - select activities - confirm entry).

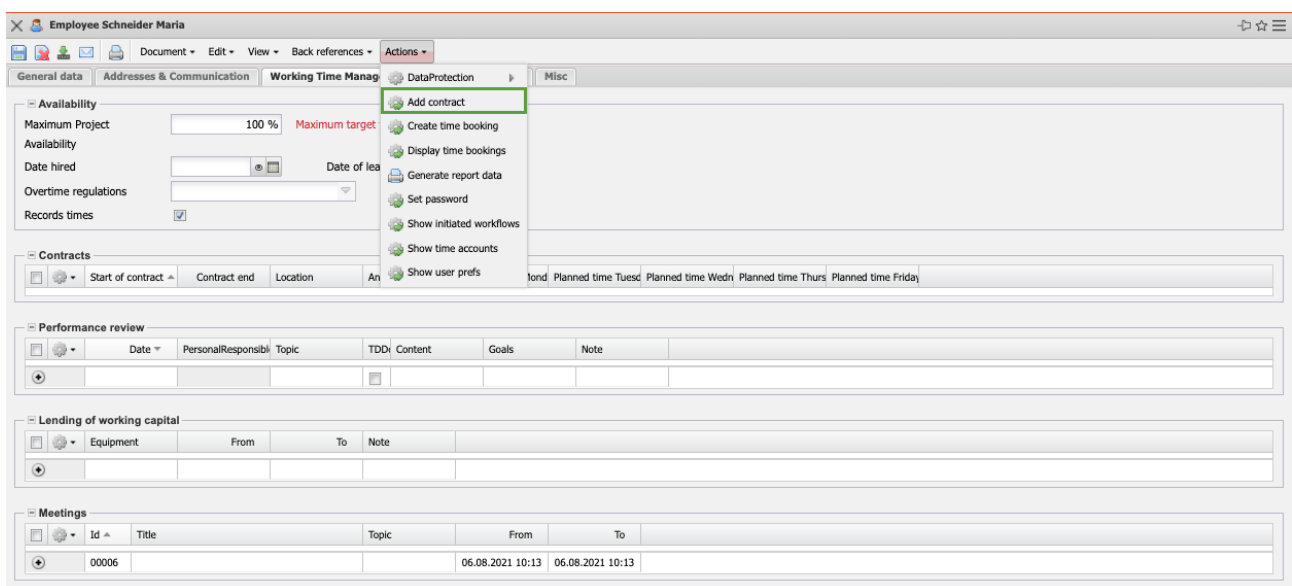
In the following example, four activities have been assigned to the employee and in the project plans, this employee is then optionally proposed for all work packages with one of these activities.

InternalKey	Description	External hourly rate	Internal hourly rate	Activ	Note
1 2	Consulting	150,00 EUR	75,00 EUR	<input checked="" type="checkbox"/>	
2 5	Consulting - Se...	150,00 EUR	69,00 EUR	<input checked="" type="checkbox"/>	
3 PM	Project Manage...	150,00 EUR	95,00 EUR	<input checked="" type="checkbox"/>	
4 SUP	Support	90,00 EUR	56,00 EUR	<input checked="" type="checkbox"/>	

3.4 Employee Contract

The "Working Time Management" tab contains, among other things, the working time contracts of employees. The contracts are used to map employee transaction data such as the contract term, vacation entitlement, flextime buffer, daily working times, maximum availability for projects, or the internal hourly rates for costing. The contracts have a defined validity. If no valid contract is assigned, the system uses the employee administration master data. Once defined, contracts can only be deleted or limited.

In the following example, a new contract is created for Maria Schneider. The action "Add contract" is executed in the actions of the screen:



Preassignments are used in the contract (based on the employee's assigned calendar).

Employee contract ID 35-1

Document -

General data Misc

Basic information

Contract number 35-1 Employee Schneider Maria Current location Baden-Württemberg

Start of contract Contract end

Annual vacation Vacation for limited period

Max flexible overrun 40 h Min flextime underrun h

Max special time 20 h Min special time h

Period Monthly non-tariff contract

Utilization

Maximum project availability 100 % Maximum target time 100 %

Planned time Monday 8 h

Planned time Tuesday 8 h

Planned time Wednesday 8 h

Planned time Thursday 8 h

Planned time Friday 8 h

Planned time Saturday h

Planned time Sunday h

Planned time sum 40 h Working days per week 5

After the remaining key data of the contract have been entered (here the contract start on 01.11.2019 and the annual holiday entitlement of 30 days), the contract is saved. Most of the fields are now read-only (because of the booking systems for flextime and vacation).

Employee contract ID 35-1 Schneider Maria 01.11.2019

Document - Edit - View - Actions -

General data Misc

Basic information

Contract number 35-1 Employee Schneider Maria Current location Baden-Württemberg

Start of contract 01.11.2019 Contract end

Annual vacation 30 d Vacation for limited period

Max flexible overrun 40 h Min flextime underrun h

Max special time 20 h Min special time h

Period Monthly non-tariff contract

Utilization

Maximum project availability 100 % Maximum target time 100 %

Planned time Monday 8 h

Planned time Tuesday 8 h

Planned time Wednesday 8 h

Planned time Thursday 8 h

Planned time Friday 8 h

Planned time Saturday h

Planned time Sunday h

Planned time sum 40 h Working days per week 5

Note: For fixed-term contracts, the end of the contract can/should be filled in and then the field "Total vacation entitlement" (vacation entitlement for the defined period) can also be used.

In the tab "Misc" you can also enter the time-related external hourly rate (not available in every version) and the time-related internal hourly rate. This internal hourly rate also has the highest priority system-wide for the determination of project costs.

Employee contract ID 35-1 Schneider Maria 01.11.2019

Document - Edit - View - Actions

General data Misc

External hourly rate BAT 7

Internal hourly rate 68,50 EUR

Monthly salary EUR

Number monthly salaries

Annual salary EUR

Note

Rentability %

If basic parameters of the contract change, an employee leaves the company or in the case of fixed-term contracts, it is necessary to set the end of the contract (action in the contract "Set Date").

ContractDuration

Please insert Contract Duration

Begin 01.11.2019

End 06.08.2021

OK

If a follow-up contract is then to be created in the employee, the action "Add contract" is executed again ...

Employee contract ID 35-1 Schneider Maria 01.11.2019

Document - Edit - View - Actions

General data Misc

External hourly rate BAT 7

Internal hourly rate

Monthly salary EUR

Number monthly salaries

Annual salary EUR

Note

Rentability %

Actions menu:

- Delete contract
- Duplicate a contract
- Set date

... and the system copies all relevant information from the "previous contract".

The changes are then made (in the example, a reduction in working time on Friday) and the contract is saved.

Employee contract ID 35-2

Document -

General data Misc

Basic information

Contract number 35-2 Employee Schneider Maria Current location Baden-Württemberg

Start of contract 07.08.2021 Contract end

Annual vacation 30 d Vacation for limited period

Max flexible overrun 40 h Min flexitime underrun

Max special time 20 h Min special time

Period Monthly non-tariff contract

Utilization

Maximum project availability 100 % Maximum target time 100 %

Planned time Monday 8 h

Planned time Tuesday 8 h

Planned time Wednesday 8 h

Planned time Thursday 8 h

Planned time Friday 5 h

Planned time Saturday h

Planned time Sunday h

Planned time sum 37 h Working days per week 5

The employee now has two contracts - full time, 40 hours per week until 06.08.2021 and then 37 hours:

Employee Schneider Maria

Document - Edit - View - Back references - Actions -

General data Addresses & Communication Working Time Management Skill management Misc

Availability

Maximum Project 100 % Maximum target time 100 %

Availability

Date hired Date of leaving

Overtime regulations

Records times

Contracts

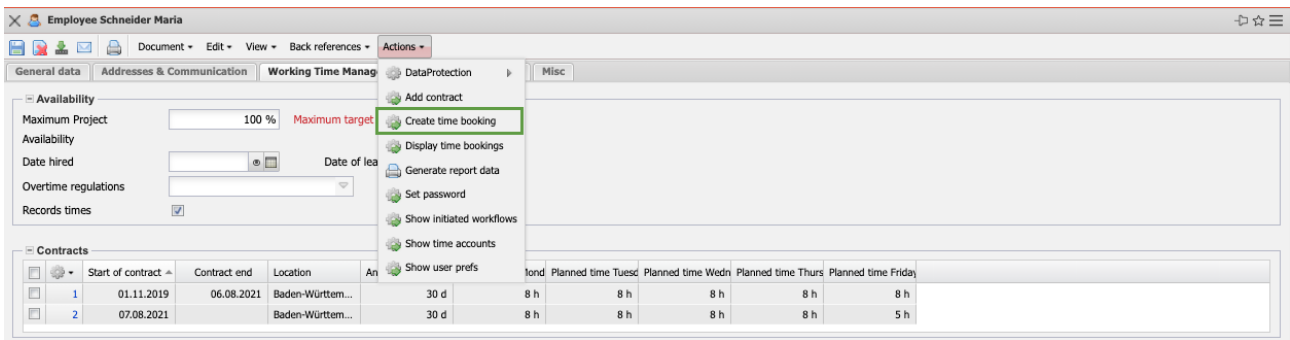
	Start of contract	Contract end	Location	Annual vacation	Planned time Mond	Planned time Tues	Planned time Wedn	Planned time Thurs	Planned time Friday
1	01.11.2019	06.08.2021	Baden-Württem...	30 d	8 h	8 h	8 h	8 h	8 h
2	07.08.2021		Baden-Württem...	30 d	8 h	8 h	8 h	8 h	5 h

3.5 Time Bookings

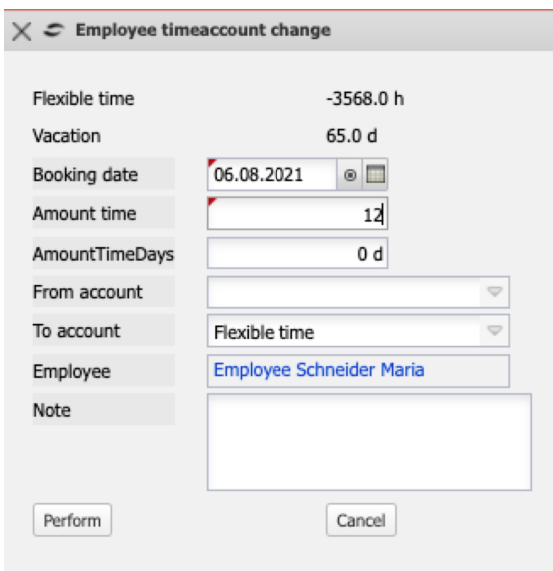
Once the employee contracts have been defined, working time management is ready for use. The corresponding data (working times, leave, and so on) for the time accounts now comes from the working time recording function.

Attention: With the action "Post time accounts" the time accounts can be fixed at any time. This means that the time accounts can no longer be edited until the selected date!

In the following example the time and vacation account of the employee Schneider is to be edited. With the help of the action "Add time booking" ...



... can then be booked for hours (for the flexitime account) or days (for the holiday account). In the example, 12 hours are posted from "nothing" (source account) to the target account "flexitime" on the posting date 06/08/2021. This means that employees receive an additional 12 hours on the posting date in their flexitime account.



Note: Projectile only supports "positive bookings"! If hours are to be debited, the source account is set to "flexitime" and the target account is empty.

In the next example, 2.5 days of "nothing" (source account) are booked to the target account "vacation" on the booking date 01.11.2019, i.e. the employee gets 2.5 additional days to her vacation account on the booking date.

The screenshot shows a dialog box titled "Employee timeaccount change". It contains the following fields and values:

- Flexible time: -3568.0 h
- Vacation: 65.0 d
- Booking date: 06.08.2021
- Amount time: (empty)
- AmountTimeDays: 2,5
- From account: (empty dropdown)
- To account: Vacation
- Employee: Employee Schneider Maria
- Note: (empty text area)

At the bottom, there are two buttons: "Perform" and "Cancel".

Note: Projectile only supports "positive bookings"! If holidays should be debited, the source account is set to "holiday" and the target account is empty.

Further remarks:

The account information of employees can be viewed centrally in the personnel menu under "Time accounts (book and display)". However, posting should only be carried out in close coordination with the administrator, as it cannot be reversed easily. In addition, the data can also be evaluated in other evaluations (for example, the employee evaluation - "Project time internal/external").

Each employee can view "his" flextime and vacation status in the timesheet, among other things.

3.6 Units

The mask "Unit" manages the organizational structures of the company. Usually, departments and teams (in the case of holding companies also companies and locations) with the corresponding employees are defined here. These units are used (analogous to the projects) as a basis for the local authorization system (see also Administration Guide). They can also be used to assign projects to organizational units.

The screenshot shows the 'Unit 7' configuration form. The left sidebar contains a navigation menu with the following items: Administration, Customer relationship manage..., Human resources, Employees, Employee contracts, Absence registration, Working time accounts, Organization structure (highlighted), Occupations, Hourly rates, Chart, Queries, Lock time tracking, Project management, Purchasing and procurement, Offer and order, Tracking, Billing, Ticket management, Risk management, Query manager, Filter, Team calendar, Info market, Forum, Sticky Notes, and Settings. The main form area is titled 'Unit 7' and has tabs for 'General data' and 'Misc'. The 'General data' tab is active and contains the following sections:

- Basic information:** A text field for 'Description', a dropdown for 'Cost center', and a checkbox for 'Active'.
- Structure:** A dropdown for 'Parent unit' and a table for 'Subordinate units' with columns for 'Description', 'Unit managers', and 'Active'.
- Unit managers:** A table with columns for 'First name', 'Name', 'Work phone', 'Mobile number', and 'Email Address'.
- Unit members:** A table with columns for 'First name', 'Name', 'Work phone', 'Mobile number', and 'Email Address'.

The "Units" are created and subdivided in the same way as the "Occupations" (see Section 3.2). After creating the "topmost" unit, the subdivision can be made in the field "subordinate units". The action "Duplicate document" should also be used for units on the same level.

The following example shows the unit "Company 1". This unit does not represent the "top" level (this is the unit "Holding" - see field "Parent unit"). Company 1 has a unit manager and four directly assigned employees and is itself again divided into "Firm 1" and "Firm 2":

Unit Holding

Document Edit View

General data Misc

Basic information

Description Holding

Cost center 150 - Geschäftsführung Active

Note

Structure

Parent unit

Description	Unit managers	Active
1 Firm 1	Schmidt Norber...	<input checked="" type="checkbox"/>
2 Firm 2	Klatt Maria	<input checked="" type="checkbox"/>

Unit managers

First name	Name	Work phone	Mobile number	Email Address
1 Norbert	Schmidt	-20		norbert.schmidt...

Unit members

First name	Name	Work phone	Mobile number	Email Address
1 Maria	Schneider	+496131 62768...	+49160 126276...	m.schneider@fi...

3.7 External and Abstract Staff

External employees are initially created like internal employees. The main difference is the employee status ("External Employee"). An employee contract is usually not created and in some versions the external employee is also assigned to a vendor:

Employee Shift AG

Document Edit View Back references Actions

General data Addresses & Communication Working Time Management Skill management Misc

Basic information

Personnel number

Salutation Firm Title

Name Shift AG First name

Note

Organization

Employee status Abstract Employee Function

Current location Baden-Württemberg Cost center

In practice, abstract employees (generic resources) are often used as "placeholders" in resource planning. In Projectile, such an employee is indicated by the employee status ("Abstract employee").

Basic information

Personnel number:

Salutation: Firm Title:

Name: Java First name:

Note:

Organization

Employee: Abstract Employee Function:

status:

Current location: Baden-Württemberg Cost center:

If this type of employee is not used as a mere placeholder, for example to assign a task to a certain group of employees, the optional team planning can be used. Here, "real" employees and their share of the generic resource are assigned to the abstract employees.

This assignment can be made on the "Work Time Management" tab in the "Team" frame.

Working Time Management

Availability

Contracts

Performance review

Lending of working capital

Meetings

Time tracking

Team

AssignmentOccupation:

	AbstractEmployee	Employee	Capacity assigned
1	Java	Eilers Hans	20 %
2	Java	Jansen Heidi	80 %
			100 %
+	Java		0 %

Note: In the section "Capacity evaluations" these resources (including the corresponding team) can also be evaluated.