

# Projectile Version 5.9

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

## Help, Part 3: Personnel Management, HR

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#### **3.1 Personnel Management**

Personnel management refers to the orientation of a company towards its inter- nal 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".

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Tracking				19	-										
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Dicket management															
Risk management															
Query manager															
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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.

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🚨 Employees	•	2	*Entwicklung			Basic info	rmation								
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Purchasing and procurement		12	Klausen	Fritz		Current location	on Ber	lin		~	Cost	40 - En	twicklung		
D 39 Offer and order		13	Maier	Gabi							center				
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	E	20	Otto	Frauke	004								_		
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info market		22	Raber	Olivia	009				•			-			
(m)	Real Property lies					a lange									

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 ...

	:haub Peter - 🧿 - 🗥	💼 🔹 🔯 TimeTracki 🗮	Team cale: 🔟 MPM I 🔟 M	IPM II 🔟 DB I	DB II 🗰 Ausl. I 💼	Search	Document type Q
<b>44</b>	X 🔨 Occupation 2						→☆目
Administration	📄 Document • Edit •						
Customer relationship manage	General data Miss						
4 🚨 Human resources	General Gata Prise						
🚨 Employees 💿	Basic information						
Employee contracts	Description						
Absence registration	External hourly	EUR					
Working time accounts	rate						
A Organization structure	Internal hourly rate	EUR	Production cost hourly rate		EUR		
Occupations	Active		Travel times	1			
🔔 Hourly rates 📀	Unit		-				
🖻 💼 Chart	Onic		<u> </u>				
Queries	Note						
Lock time tracking							
Project management	- E Structure						
Purchasing and procurement	Parent occupation						
Offer and order	Subordinate occupations	InternalKey	Description	External hourly rate	Internal hourly rate Note	Activ	
Tracking							
D 🕑 Billing							
Dicket management							
Risk management							
Query manager							
-Filter							
Team calendar							
anfo market							

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

General data Misc				
- Basic informatio	n			
Description	Consulting			
External hourly	150,00 EUR			
rate				
Internal hourly rate	75,00 EUR	Production cost hourly rate	EUR	
Active		Travel times		
Unit		$\bigtriangledown$		
Note				
- Structure				
- ∃ Structure Parent occupation				

Occupations can also be further subdivided (for more detail). In the following ex- ample, 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, ...

🗙 < Occupation Consulting						₽☆日
🔚 🙀 🚣 🛛 Document 🕶 Edit	• V	ew • Back references •				
General data Misc		Subordinate occupations				
Basic information		New				
Description Consultin	0	Сору				
External hourly	0	Paste				
rate	$\Theta$	Remove				
Internal hourly rate	9	Find	on cost hourly rate	EUR		
Active		Print	Travel times			
Unit	db	Report				
Note	*	ListToDock				
		ToOverview				
Structure	3	Clear				
Parent occupation		Filter				
Subordinate occupations	÷	InternalKey Descript	ion	External hourly rate Internal h	ourly rate Note	Activ

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

X 🔨 Occupation Cor	nsulting			-□ ☆ ==
📄 🙀 🛓 🛛 Documer	nt • Edit • View • Back reference	ces •		
General data Misc				
Basic informatio	n			
Description	Consulting			
External hourly	150,00 EUR			
rate				
Internal hourly rate	75,00 EUR	Production cost hourly rate	EUR	
Active		Travel times	3	
Unit				
Note				
- E Structure				
Parent occupation				
Subordinate occupat	ions 📄 🌼 🕶 InternalKey	Description	External hourly rate Internal hourly rate Note	Activ
-				

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

X < Occup	ation Consulting	心☆∃
🖹 🖹 🛓	Document • Edit • View • Back references •	
General data Basic in Description External hor rate Internal hor Active Unit	Save the document   Delete the document   Copy this document to the dock   Print this document   Opy document   Copy document   Copy document   Copy document from this template   Travel times	
Note  Subordinate	e pation occupations	

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

🗙 < Occupation Cor	sulting - Junior			
📄 🙀 🛓 🛛 Documer	nt • Edit • View • Back reference	es •		
General data Misc				
Basic informatio	n			
Description	Consulting - Junior			
External hourly	120,00 EUR			
rate				
Internal hourly rate	69,00 EUR	Production cost hourly rate	EUR	
Active		Travel times		
Unit		$\bigtriangledown$		
Note				
- E Structure				
Parent occupation	Consulting			
Subordinate occupati	ons 📄 🌼 🕶 InternalKey	Description	External hourly rate Internal hourly rate Note	Activ

... 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.

🔇 < Occupation Con	sulting								-口 公 :
🛾 🙀 🔬 🛛 Documen	it <del>v</del> Ed	t <del>v</del> Vie	w - Back referend	es ▼					
General data Misc									
Basic information	n								
Description	Consult	ing							
External hourly			150,00 EUR						
rate									
Internal hourly rate			75,00 EUR	Production cost hourly rate		EUR			
Active	V			Travel times	]				
Unit				$\bigtriangledown$					
Note									
E Structure									
Parent occupation									
Subordinate occupati	ons 📃	- 🤃 I	InternalKey	Description	External hourly rate	Internal hourly rate	Note	Activ	
		1	4	Consulting - Junior	120,00 EUR	69,00 EUR			
		2	5	Consulting - Senior	150,00 EUR	69,00 EUR			
	E	3	6	Consulting - Manager	150,00 EUR	69,00 EUR			

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:

. 📢	Compa	ny CSH Co	onsult AG												
	2 0		- 🔛 c	locument +	Edit + View	Back references	Actions +								
Genera	al data	Marke	ting Sal	es Addre	sses & Comn	nunication Finar	ci 🏐 Create e	customer-related externa	al prices						
Ba	nsic inf	ormation					K Create	customer-related occupa	tions						
Abbre	eviation		SH			Category Custon	e 📄 Create i	invoice							
Comp	bany na	ime C	Consult AG				Create ;	Create project							
Old c	d company Consult Holding AG me						Create :	supplier contract ticket							
Block	cked Reason for blocking					for blocking	🎲 Display	customer-related extern	al prices						
Note		[					A Display	customer-related occupa	ations						
- * St	ructure	e					Export	vCard iontact manager tter							
	(j) •	Salutation	Title	Last name 4	First name	Function	F	blocked	ddress						
	1	Mrs.	Dr.	Nahl	Lisa	Geschäftsführung	089 / 7312-10	0 089 / 12 20 120	nahl@consult.de						
	2	Mr.	Doctor I	Sander	Peter	Geschäftsführung	089 / 73 13 10	05 0172/ 67 90 760	sander@consult						
				1			+4090 730010	0		1					

**Note:** For individual projects, both the "standard" activities and the customerrelated 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.

	A X S Employee	35					-D 🕁	Ξ
Administration	Docum	nent - Edit - View -						
Customer relationship manage	General data	Addresses & Communication	Working Time Management	Skill management	Misc			
4 🛅 Human resources			normally rand randyantette	on management	1100			
Semployees	Basic inform	nation		_				
a Employee contracts	Personnel							
Absence registration	number							
Working time accounts	Salutation			Title				
A Organization structure	Name			First name				
Occupations	Note							
Rourly rates	•							
D 💼 Chart	- Constanting							
Queries	Employee	n Found	Eustica					
Lock time tracking	ctature	Fixed	< Function		- MI			
Project management	status	To 1 1000						
Purchasing and procurement	Current location	Baden-Wurttemberg	Cost		4			
Offer and order		-	center					
Tracking	Supplier		×					
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Ticket management								
Risk management	- Technical in	formation						
Query manager	Active user	<b>1</b> 0						
	Leele							
🛗 Team calendar	Login							
📲 Info market	Default user role	e Gruppe 09 - Mitarbeiter (inte	m) [ 🐃					
🐺 Forum	User language	German	V					
Sticky Notes	Locale	de						
Settings	GUI							

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

<li>&lt; Semiconaria Employee</li>	Schneider Maria			₽☆≡
	Document + Edit + Vie	w • Back references • Actions	•	
General data	Addresses & Communication	Working Time Management	Skill managemen	t Misc
Basic inform	ation			
Personnel	45			
number				
Salutation	Mrs.		Title	
Name	Schneider		First name	faria
Note				
- 🗉 Organization				
Employee	Fixed			₽
status				
Current location	Baden-Württemberg			
		center		
Supplier		~		
Unit	Description	Activ Unit managers		
E Technical in	ormation			
Active user				
Login	MSchneider			
Default user role	Gruppe 09 - Mitarbeiter (inte	m) i 🗢		
User language	English	$\bigtriangledown$		
Locale	de	$\bigtriangledown$		
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.

×	Options (6 Results	)		🗙 🚨 Employe	e Schneider Maria				₽☆⊟
+	Include selection	4 🗅 🗹 🖨 🛻	🛓 😰 📝 🛛 Filte	📄 🔒 🛓 🖂	🔒 Document + Edit + Vi	ew  Back references  Actions	•		
	Description	Activ Unit managers	Cost center	General data	Addresses & Communication	Working Time Management	Skill managem	nt Misc	
	leratung     Entwicklung     Firma 1     Firma 2     Stolding     Support	Image: Schmidt Norbert       Image: Schmidt Norbert <t< td=""><td>300 - Beratung 200 - Entwicklung 150 - Geschäfts 150 - Geschäfts 150 - Geschäfts 400 - Support</td><td>Basic info Personic number Salutation Name Note Organizati Employee status Current locatio Supplier Unit Technical I Active user Login Default user m User language Locale GUI</td><td>Information</td><td>Function     Cost     center     Activ Unit managers</td><td>Title First name</td><td>Maria</td><td> </td></t<>	300 - Beratung 200 - Entwicklung 150 - Geschäfts 150 - Geschäfts 150 - Geschäfts 400 - Support	Basic info Personic number Salutation Name Note Organizati Employee status Current locatio Supplier Unit Technical I Active user Login Default user m User language Locale GUI	Information	Function     Cost     center     Activ Unit managers	Title First name	Maria	 

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.

< 🤱 Employee S	chneid	er Ma	ria				-D
	A	Docum	ent • Edit • Vi	iew +	Back references - Action	rs •	
General data A	ddress	ies &	Communication	Wor	king Time Management	Skill management	ment Misc
Basic informa	tion -						
Personnel numbe	r 45						
Salutation	Mrs				▼	Title	Je 🗢
Name	Sch	neider				First name M	Maria
Note							
- Organization							
Employee	Fixed			0	Function		
status							
Current location	Bade	n-Würl	ttemberg	0	Cost		♥
					center		
Supplier				0			
Unit		<u>ه</u> ٠	Description	Activ	Unit managers		
		1	Holding	V	Schmidt Norbert		
		2	Support		Jahnke Kevin		
Technical inf							
Active user	mate	on —					
Active user	Ner al	I d -					
Login	MSC	neide					
Default user role	Grup	pe 09	<ul> <li>Mitarbeiter (inte</li> </ul>	ern) I 🤉			
User language	Engli	sh		9			
Locale	de			4			

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:

<sup>©</sup> Information Desire Software GmbH

🗙 🚨 Employee	Schneider Maria		-0-☆=
🖻 隆 🛓 🖾	Bocument - Edit - View - Back reference	Actions	
General data	Addresses & Communication Working Time Ma	agement Skill management Misc	
- E Address -			
Street A	n der Brunnenstube 25		
Postal code 55	5120	City Mainz	
Country G	ermany 🗢		
Communica	tion		
Phone number	+496131 6276813		
Mobile number	+49160 12627613		
Email Address	m.schneider@firma.de	2	
Private email ad	ddress m.schneider@web.de	Ð	
Private phone			
number			

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 ...

× o	ptions (17 Results)		X 🧟 Employee Schneider Maria					
+	Include selection 🛛 👫 🐚 🗹 🚔	💼 🚨 😰 🐼 🛛 Filti	🔚 🎅 🚣 🖂 🚔 Document + Edit + View + Back references + Actions +					
	Description	External hourly rate Inter	General data Addresses & Communication Working Time Management Skill management Misc					
	1 Beratung	125,00 EUR	- Professional skills					
	2 Beratung - Junior	100,00 EUR	Totosolutial anino					
E	3 Beratung - Senior	150,00 EUR	Beefeesteest stills					
	4 Consulting	150,00 EUR	Proressional skills					
	5 Consulting - Junior	120,00 EUR	S & Cut					
	6 Consulting - Manager	150,00 EUR	Сору					
	7 Consulting - Senior	150,00 EUR	C Paste					
	8 Dokumentation	90,00 EUR	Remove					
	9 Interne Tätigkeit	0,00 EUR	ind ind					
1	0 Programmierung	105,00 EUR	Print Bonption					
1	1 Programmierung - Datenbanken	100,00 EUR	💼 Report					
1	2 Programmierung - Java	120,00 EUR	R C & ListToDock					
1	3 Programmierung - XML	90,00 EUR	Subj 🕄 ToOverview 🤝					
1	4 Project Management	150,00 EUR	Man d'Clear 🗢					
1	5 Schulung	125,00 EUR	skills Filter					
1	6 Support	90,00 EUR						
1	7 Testen	90,00 EUR	_ ⊡ IT skills					
			Databases 🗢					
			Programming 🗢					
			Network					
			Administration skille					
			PARTITING OVAL OVAL					

... 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.

8	🔓 Employee Schneider Maria									
-	2	🖂 🔒 Docu	ment • Edit • View	w • Back references	Actions •					
Gener	ieneral data Addresses & Communication Working Time Management Skill management Misc									
- 🖻 P	rofess	ional skills								
	10-	InternalKey A	Description	External hourly rate	Internal hourly	rate Activ	Note			
	1	2	Consulting	150,00 EUR	75,00 E	UR 📰				
E	2	5	Consulting - Se	150,00 EUR	69,00 E	UR 🗾				
5	3	PM	Project Manage	150,00 EUR	95,00 E	UR 📰				
E	4	SUP	Support	90,00 EUR	56,00 E	UR 🗾				

#### **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 wor- king 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, con- tracts 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:

🗙 🚨 Employee Schneider Maria			-D-0=
📄 🙀 🛓 🖂 🚔 Document • Edit • View • Back references •	Actions +		
General data Addresses & Communication Working Time Manag	DataProtection	¢	
Availability	add contract		
Maximum Project 100 % Maximum target Availability Date hired Date of lea Overtime regulations Records times	Create time booking  Display time bookings  Generate report data  Set password  Show initiated workflows  Show time accounts		
Contract end Location Ar	Show user prefs tone	anned time Tuesd Planned time Wedn	Planned time Thurs Planned time Friday
E Performance review			
Date * Date * PersonalResponsibil Topic TD	Di Content Goals	Note	
•			
Figure From To No	te		
<ul> <li></li></ul>			
☐ ■ Meetings			
📰 🚳 • Id • Title To	pic From	То	
<ul> <li>00006</li> </ul>	06.08.2021 10:13	5.08.2021 10:13	

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

K 🚨 Employee cont	ract ID 35-1						-12 公 日
Document +							
General data Misc							
- E Basic informatio	n						
Contract number	35-1		Employee	Schneider Maria	V	Current location Baden-Württemberg 🗢	
Start of contract	•	1	Contract end	•			
Annual vacation		4	Vacation for limited	d			
			period				
Max flexible overrun	40 1	h	Min flextime underrun	h			
Max special time	201	h	Min special time	h			
Period	Monthly		<ul> <li>non-tariff contract</li> </ul>	III			
Utilization     Maximum project ava	ailability	100 %	Maximum target time	100 %			
Planned time Monda	y [	8 h					
Planned time Tuesda	v [	8 h					
Planned time Wedne	sday	8 h					
Planned time Thursd	ay	8 h					
Planned time Friday		8 h					
Planned time Saturda	ау	h					
Planned time Sunday	/	h					
Planned time sum		40 h	Working days per	5			
			week				

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 contr	ract ID 35-1 Schne	der Maria 01	.11.2019			-口 ☆
🔹 Document +	Edit • View • A	ctions +				
eneral data Misc						
Basic information	n					
Contract number	35-1		Employee	Schneider Maria	Current location Baden-Württemberg	
Start of contract	01.11.2019		Contract end			
Annual vacation	3	0 d	Vacation for limited			
			period			
Max flexible overrun	4	0 h	Min flextime underrun	h		
Max special time	2	0 h	Min special time	h		
Period	Monthly		non-tariff contract			
Utilization						
Maximum project ava	ailability	100 %	Maximum target time	100 %		
Planned time Monday	/	8 h				
Planned time Tuesda	y	8 h				
Planned time Wedne	sday	8 h				
Planned time Thursda	ay	8 h				
Planned time Friday		8 h				
Planned time Saturda	зу					
Planned time Sunday	'					
Planned time sum		40 h	Working days per	5		
			week			

**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.

Call Employee contract ID 35-1	Schneider Maria 01.11.2019	
🔒 🏯 Document + Edit + View	v + Actions +	
General data Misc		
External hourly rate BAT 7	Q	
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").

×=c	contractDuration	on	
Please	insert Contract	t Dur	ation
Begin	01.11.2019	۲	
End	06.08.2021	۲	
End	06.08.2021 OK	0	

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

Employee contra	ct ID 35-1 Schneider Maria 01.11.2019	\$
🔒 🔔 🛛 Document •	Edit - View - Actions -	
General data Misc	Delete contract	
External housing rate	Duplicate a contract	
Internal hourly rate	Set date	
Monthly salary	EUR	
Number monthly alaries		
nnual salary	EUR	
lote		
Rentability	96	

... 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 conti	ract ID 35-2				-(2 合 三
Document +					
General data Misc					
Basic informatio	n				
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	d		
		period			
Max flexible overrun	40 h	Min flextime underrun	h		
Max special time	20 h	Min special time	h		
Period	Monthly	<ul> <li>non-tariff contract</li> </ul>			
Utilization     Maximum project ava	ailability 100	0 % Maximum target time	100 %		
Planned time Monday	y [	8 h			
Planned time Tuesda	v [	8 h			
Planned time Wednes	sday	8 h			
Planned time Thursda	ay	8 h			
Planned time Friday		5 h			
Planned time Saturda	ау	h			
Planned time Sunday	/	h			
Planned time sum	3	17 h Working days per	5		

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

🤇 🚨 Emp	oloyee Schneider	Maria								4	
		cument • Edit • V	iew - Back reference	s • Actions •							
General da	ata Addresse	& Communication	Working Time Ma	nagement Skil	ll management    I	Misc					
- Availa	bility										
Maximum	n Project	10	00 % Maximum tar	rget time	100 %						
Availabilit	γ.										
Date hire	d		Date of Dat	f leaving	•						
Overtime	regulations		<								
Records t	imes										
Contr											
E Contra	* Start of contr	ct + Contract and	Location	Annual vacation	Planned time Mond	Planned time Tuerr	Planned time Wade	Planned time Thur	Planned time Eriday		
E	1 01.11.2	019 06.08.202	21 Baden-Württem	30 d	8 h	8 h	8 h	8 h	8 h		
0	2 07.08.2	021	Baden-Württem	30 d	8 h	8 h	8 h	8 h	5 h		
	2 07.08.2	021	Baden-Wurttem	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" ...

Kan Schneid	r Maria								○☆日
	ocument + Edit + Vie	w - Back reference	+ Actions +						
General data Address California Address Availability Maximum Project Availability Date hired Overtime regulations Records times	as & Communication	Working Time Ma % Maximum tar Date o	nag DataProtection Add contract Create time bookin Display time bookin Generate report da Set password Show initiated work	▶ 1000000000000000000000000000000000000	Misc				
Contracts	ract + Contract end	Location	An Show user prefs	s Ione	d Planned time Tuesd	Planned time Wedn	Planned time Thurs	Planned time Friday	
1 01.1	2019 06.08.2021	Baden-Württem	30 d	8 h	8 h	8 h	8 h	8 h	
2 07.0	2021	Baden-Württem	30 d	8 h	8 h	8 h	8 h	5 h	

... 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 "flextime" on the posting date 06/08/2021. This means that employees receive an additional 12 hours on the posting date in their flextime account.

lexible time	-3568.0 h	
acation	65.0 d	
Booking date	06.08.2021 🛛 🔲	
Amount time	12	
AmountTimeDays	0 d	
From account		V
o account	Flexible time	V
Employee	Employee Schneider Maria	
Note		

**Note:** Projectile only supports "positive bookings"! If hours are to be debited, the source account is set to "flextime" 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.

lexible time	-3568.0 h
acation	65.0 d
ooking date	06.08.2021 🛛
mount time	
AmountTimeDays	2,5
From account	▽
To account	Vacation
Employee	Employee Schneider Maria
Note	

**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.

<b>(1</b>	우 🗙 🎒 Unit 7	中心日
Administration	Document - Edit -	
Customer relationship manage	General data Misc	
4 🛅 Human resources		
🚨 Employees 📀	Basic information	
Employee contracts	Description	
Absence registration	Cost Active V	
Working time accounts	center	
Proganization structure		
< Occupations	• Hute	
🛃 Hourly rates 🕢 🖲	•	
🖻 💼 Chart	S Structure	
Queries	Parent unit	
Lock time tracking	Subordinate units 🔤 🧼 • Description A Unit managers Active	
Project management		
Purchasing and procurement		
Differ and order	S Unit managers	
Tracking	Server First name Name A Work phone Mobile number Email Address	
D C Billing		
Ticket management	⊡ Unit members	
Risk management	📄 🧼 • First name Name + Work phone Mobile number Email Address	
Query manager		
- Filter		
Team calendar		
stanfo market		
🐺 Forum		
Sticky Notes	•	
Settings		

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":

5	Unit H	lolding							¢.⊄-
	2	Docum	ient + Ec	it • View •					
enera	al data	Mis	sc						
- Ba	nsic in	formati	ion						
Descr	ription	Holdin	ng						
Cost		150 -	Caschäfts	führung	Active I				
ente	r	150 -	Geschare	iuniung	· Active				
Note									
- 51	nuctur								
aren	it unit								
ubo	rdinate	e units	m .a.	Description +		Unit m	anagers	Active	
				1 Firm 1		Schmid	It Norber		
				2 Firm 2		Klatt M	laria		
- Ur	nit ma	nagers							
	(j) •	First n	ame	Name +	Work phone	Mobile number	Email Ad	Idress	
	1	Norbe	rt	Schmidt	-20		norbert.s	schmidt	
- Ur	nit me	mbers				1.00.00	Frank Ad		
- Ur	nit mei	First n	ame	Name 🛎	Work phone	Mobile number	Email Ad	laress	

#### **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 S	hift AG			₽☆⊒
🖹 📓 🛓 🖂	🔒 Document + Edit + Vie	w    Back references    Actions		
General data	Addresses & Communication	Working Time Management	Skill management Misc	
- E Basic inform	ation			
Personnel				
number				
Salutation	Firm	$\bigtriangledown$	Title	
Name	Shift AG		First name	
Note				
<ul> <li>Organization</li> </ul>	-			
Employee	Abstract Employee	♥ Function	▽	
status				
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").

C S Employees	A Y A Y A		~~~~
2 🛓 🖂	Document • Edit • View • Back references • Ac	ions •	
eneral data	Addresses & Communication   Working Time Managem	nt Skill management Misc	
Basic inform	ation		
Personnel			
number	5		
Salutation	Firm	Title	
Name	Java	First name	
Note			
Employee	Abstract Employee Supervision	<b>v</b>	
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.

		ee Java					-口 合 日
1	2 6	Docume	ent • Edit • Vi	iew - Back references - Action	s •		
Sener	data	Addresses & C	Communication	Working Time Management	Skill management	Misc	
* Av	ilabil	ity					
• C	ntract	\$					
	form	ance review					
⊞ Le	nding	of working capita	u				
• M	etings						
	-						
. т	ne tra	cking					
	ne tra	cking					
• Ti • Te Assig	ne trae im mento	cking Occupation					
- ® Ti - ⊡ Te Assig Team	ne trad im ment(	cking Occupation ments		V			
• Ti • Te Assig	ine trai im mento kssigni	cking Occupation ments AbstractEmployee	Employee	© Capacity assigned			
Tierre	ne trad im mento kssigni () • 1	Cocupation	Employee Eilers Hans	Capacity assigned 20 %			
Team	im mento kssigni () • 1 2	Cking Decupation ments AbstractEmployee Java Java	Employee Eilers Hans Jansen Heidi	Capacity assigned 20 % 80 %			
Team	im mento kssigni () • 1 2	Constraint	Employee Eilers Hans Jansen Heidi	Capacity assigned 20 % 80 % 100 %			

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