Artologik® // **ProjectManager**

Booking system | Time management | Surveys | E-mail management | HelpDesk | Publishing tool | **Project management**

Manual

Artologik®

PM-Flex

Plug-in to ProjectManager version 3.1

Table of contents

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Artologik® ProjectManager and PM-Flex

ProjectManager, your web based software for project management and time reporting, can now be completed by the addition of one or several plug-ins. PM-Flex is a plug-in making it possible to handle flextime and overtime in your time reporting.

The advantages of PM-Flex are many. With PM-Flex, you and your co-workers can easily keep track of your worked time. Have you been working overtime or do you have to work some extra hours? Should the time you have put in be added to the time bank or should you take it out as salary? The administrator controls that every user register their time every day and the application makes it impossible to register time if the previous days are not registered properly according to registered normal working hours.

Administration

Before you and your co-workers can start using PM-Flex to keep track of worked time, there are a few administrative settings to be done.

1. Add flextime codes in the administration.
2. Give one or more users the right to verify flextime.
3. Set up verification rules.
4. Register opening balance for the users that should register flextime.

These points are described further down in the manual.

In addition to the settings above, you have to make sure that the registered normal working hours for each user are correct. How to do this is described in the general manual for ProjectManager.

Administration of flextime codes

Under Administration > Organisation settings > Flextime codes, you can define the different flextime codes that are to be used in your organization. Examples of these codes can be flextime, comp time 1.0, comp time 1.5, and comp time holiday. These flextime codes are the ones that users will choose to allocate their worked overtime between when registering time. To register a new flextime code, click on New flex code at the top of the page. To edit an existing flextime code, click on its name in the list. For each flextime code you enter the following information:

1. Which flextime group the code should belong to. For each worked hour in addition to the registered normal working hours, the opportunity to take it out in free time is given unless it is taken out as salary. When the user is registering his time and want to use some of the flextime credit, he/she

will not collect it from e g Comp time 1.0 or Comp time 1.5, but only from Comp time. Because of this, for each flextime code, you have to define which flextime group the registered time should end up in. When the user then is to take out the time, the time is withdrawn from the group where the total of registered flextime is saved.

2. Name of the flextime code in all active languages. This is mandatory.

3. If the flextime code is not possible to take out as salary. For example, it could be that only overtime ordered by the employer is possible to take out as salary, all other overtime should be added to a time group that you later could take out hours from when working less than the registered normal working hours. If the flextime code should NOT be able to take out as salary, check the box for Not possible to take as salary.

4. Salary type. When generating salary reports and import these to your accounting system, each flextime code must have a salary type for for time deposit and a salary type for additional pay. The last one must only be entered if the flextime code is possible to take out as salary. To find the current salary types we suggest you look it up in your accounting system.

5. Compensation add-on. For some of the flextime codes there is a certain degree of compensation. For example, if a person works extra on a night or a weekend, each hour might give a certain percent of compensation, e.g. that each worked hour in inconvenient working hours generates two hours to withdraw from the flextime bank. This compensation is entered in percent here. If you do not enter anything, no compensation is given for this flextime code.

6. Save.

When you have added all your flextime codes, you can enter the default allocation of the flextime. Default allocation means what should be the default settings of time allocation when registering flextime.

1. Click List all or go in under Administration > Organisation settings > Flextime codes to see all your flextime codes.

2. Enter the order the flextime codes should be shown in the column Order.

3. In the column No Hours, you can fill out how you want the overtime hours tentatively be shown to the user. For example, if a user has worked 3 hours more than the

registered normal working hours, the three hours will be allocated after your settings here. The user can of course change this when registering time, what you fill out here is only what the application will suggest.

4. Save.

Administration of flextime groups

There are two default flextime groups that can be modified. These are pre-defined as Flextime bank and Comp time bank. Each flextime code belongs to a flextime group. When adding time, it's done per flextime code, but when taking out time it's done from the flextime group. All registered time in flextime codes that belongs to the same group are summed up and multiplied with the compensation to create the flextime debit or credit.

Under Administration > Organisation settings > Flextime codes, you decide in what order the different flextime groups should be shown.

1. Click List all.

2. Under Flextime groups you fill out the order how you want the flextime groups to be shown.

3. Save.

To add a flextime group, click on New flextime group. Then enter the following information:

1. Name of the flextime group in all active languages. This is mandatory.

2. When generating salary reports and import these to your accounting system, every flextime group must have a salary type for time reduction and a salary type for deduction from salary. To find the current salary types, we suggest you look it up in your accounting system.

3. Decide if you have a maximum amount of flextime debit or credit within each flextime group. Credit or debit hours are hours which are accumulated or owed. If you do not enter anything it will be unlimited. If the user ends up outside the limits, he/she will get a warning when registering flextime. When verifying, the verifier can choose to allow the limits to be broken. If it should not be allowed, the hours outside the allowed flextime credit can be written off. If the flextime debit has been passed, it can be deducted from the salary.

To edit a flextime group, click on the name of the flextime group. You can then edit the following information:

1. Name of the flextime group in all active languages.

2. When generating salary reports and import these to your accounting system, every flextime group must have a salary type for time reduction and a salary type for deduction from salary. To find the current salary types we suggest you look it up in your accounting system.

3. Decide if you have a maximum amount of flextime debit or credit within each flextime group. Credit or debit hours are hours which are accumulated or owed. If you do not enter anything it will be unlimited. If the user ends up outside the limits, he/she will get a warning when registering flextime. When verifying, the verifier can choose to allow the limits to be broken. If it should not be allowed, the hours outside the allowed flextime credit can be written off. If the flextime debit has been passed, it can be deducted from the salary.

Register flextime

Opening balance

For a user to register flextime, an opening balance must be set. This must be done by someone with the right to verify flextime. To do this, go to the Verification menu in the time reporting part of the application. Click on the radio button by the icon for flextime and choose user in the drop-down list User. Enter the following information:

1. Date to start balance. The date you choose will be set as starting date from when the user must register flextime, i e the difference between registered time and registered normal working hours.

2. Opening balance for the different flextime groups.

3. Save

Users that do not have an opening balance registered will not be able to register flextime.

Register flextime

You only register flextime when the hours you work are not identical with your registered normal working hours. To register time, the previous days must correspond so that the sum of all registered time is the same as registered normal working hours.

Only when you have registered all worked hours for a day, you will see if you have to register flextime. When registering in Registration/day, click on the button Flextime on top of the page and if you work with Registration/week there is a link under each day for registering flextime.

A new window will open with the default settings of how to allocate the flextime in the different flextime codes. For some of the flextime codes the opportunity to take out as salary is given. If you have worked less than your registered normal working hours, the hours are withdrawn from the different flextime groups. Note that a verifier will verify your flextime registrations and can modify these.

If the administrator has defined a maximum amount of flextime debit or credit within the flextime group, you will get a warning if you land outside this limit when registering. If you have exceeded the flextime credit, the verifier has the right to write off the hours above the limit and you will no longer have the right to make use of them. If you have fallen short of hours and are below the approved flextime debit, the verifier can regulate this by deduction from salary. All this occurs when the flextime registrations are verified.

Verification

Verification rules

Under Administration > Organisation settings > Verification, you make up the rules of verification that are applicable for the users that have the right to verify flextime. Which one of the models for verifying flextime you choose depends on what suits your organization the best. The alternatives depends on what the person who has the right to verify flextime should be able to verify:

- All users
- Chosen users (one verifier per user)
- Chosen users (multiple verifiers per user)
- Users belonging to the same result unit as the verifier
- Users belonging to the same user group as the verifier

If you choose alternatives 2 or 3 above, the verifier is set for each individual user under Administration > Register maintenance > Users.

You also have the possibility to block the possibility for a verifier to verify his/her own registrations, by checking the box for Verifiers cannot verify their own registrations.

Do not forget to save.

Administrate verification rights

Under Administration > Register maintenance > Users, you administrate the users who should have the right to verify the registered flextime. Search for the user that you will allot verification rights or click on the name of the person. Next to the user role in the middle of the page, there is a button for changing User rights. When clicking on this, a new window will open where you can define the user rights. Up to the right under Registration, there is a check box for verifying flextime. Check the box and save.

Verify flextime

The users who have the right to verify flextime can, under Verification in the time editing part, see and verify flextime registrations.

1. Check the radio button by the icon for flextime and select a user in the drop-down list User.

2. You will now see selected user's not yet verified flextime up to selected date. If you change date you will see the registrations up to that date, or the verified registrations for that date if it is already verified.

3. Control the flextime registrations the user has made, edit when needed. The time left to be allocated must always be zero for you to be able to verify.

4. If the user's balance has passed the maximum amount of flextime debit or credit for a flextime group, you can either choose to accept that the limits have been broken, or adjust this. If the credit limit has been passed, you can write off the hours above the limit. You can under Allocation of plus time write off the hours that are above the credit limit for each day and the user will then no longer be able to make use of them. If the debit limit has been passed, you can choose to make a deduction from salary. Under Salary deduction, enter the hours that should be deducted from salary for each flextime group. These hours will be shown in the report Salary details.

5. Save. You can continue working and changing the times after saving them until you click Verify.

6. When you are all done with the registrations, you click Verify. When clicking Verify, all times are locked and can no longer be adjusted. This is applicable for both regular time registration and flextime registrations up to selected date.

By clicking on the arrows on the top left on the page, you can browse through previous verification periods. If you need to lock up an already verified period, you have to lock up all periods verified after that period. You do this by clicking the button Undo the verification. Note that you can only undo the latest verification. If you want to undo verified registrations further back in time, you have to lock up the verifications one by one.

Reports

Monthly reports

Flextime report

In the Flextime report you can easily see your flextime registrations for the selected month. On the top of the page you can choose the year and the month you want to see flextime registrations for. If you have the right to see registrations for other users, you can also choose users in the top of the page.

In the list of your flextime registrations you can see for each flextime group:

- Date
- Type of flextime code (for allocation) flextime group (for withdrawal)
- Number of hours that were deposited to or withdrawn from the group
- If any hours have been deducted from salary
- Balance at the moment

On the page, you can also view opening balance and total/closing balance.

Time reports

Flextime report

In the flextime report, you can choose for which period of time you want to see the flextime registrations. If you have the right to see time registrations for other users, you can choose user in the top of the page. Thereafter you choose the period of time you like to see the registrations for, and how you want the time to be summarized. If you choose for example to present it per week, the balance will be shown for every week. By checking the box for Detailed report, you will be able to see each individual flextime registration. If you do not check that box, you will only be able to see the sum of the registrations.

Salary report

Salary details

For each user, the registered flextime will be shown for selected salary period. All registered time will be shown, regardless if it is verified or not.

For each flextime group a sum of allocations and withdrawals is shown. The payments to and deductions from salary are shown in the column To salary.

Step-by-step

To help you get started with handling flextime in ProjectManager, we have created a step-by-step direction for the administrator. Each step is described in the manual above.

1. Decide what flextime codes you want to use in your organization and enter these in the Administration of flextime codes.

2. Decide which users should have the right to verify flextime and give them verification rights in the User administration.

3. Set up verification rules under Verification administration.

4. Add opening balance for the users that are to register flextime. Also make sure that these users have correct registered normal working hours in their calendar.