

PowerPM v6.20 PTO Tracking Feature Note 1

Overview

PTO Tracking - PowerPM v6.20 adds a new PTO tracking feature. Implementation of this feature requires that PowerForeCast is a licensed component of your PowerPM installation. This feature is intended as an update to PowerPM v6.10 but can be installed over version 6.00 and later versions of PowerPM. This document outlines how to implement this feature in PowerPM.

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Master Files

To enable the PTO feature in PowerPM, run the Master Files application and select a Leave code to be used for tracking PTO. It may be useful to modify the defined Leave codes to better utilize the PTO feature.

PowerPM Master Files
Moore & Profitt

Company Offices Calendar Codes Groups Templates Tasks & Due Dates Task Groups

Firm/Company Name: Moore & Profitt

Federal ID: 123456789098 Standard Hours/Day [0.0 - 24.0]: 8.0 PTO Leave Code: 01-00 - Paid Time Off

Base PTO on Calendar Year?

Important Dates Finance or Service Charges Percent / Year Number of Days

(Figure 1)

The selected PTO Leave code may be a Primary or Secondary level code. If a Primary code, all codes in the primary code group are available as PTO codes. In this example, by selecting the Primary Leave code group "01-00 Paid Time Off", any codes within the group will be tracked as PTO.

Note that code 01-06 PTO Accruals has been deactivated. This allows the code to be used in defining PTO time earned while prohibiting its use in timesheet entries. Some installations may opt to track all PTO data using a single Secondary Code value.

Work Transaction Type
Leave Time

Work Code		Description	Tax	Bill Code		Multiplier
1st	2nd			1st	2nd	
01	00	Paid Time Off	0	00	00	
01	01	Illness or Injury	0	00	00	
01	02	Holiday	0	00	00	
01	03	Vacation	0	00	00	
01	04	Maternity/Paternity	0	00	00	
01	05	Personal Time	0	00	00	
01	06	PTO Accruals	0	00	00	

(Figure 2)

The default is for PTO to be tracked based on the defined PowerPM Fiscal Year. This may be modified by checking the "Base PTO on Calendar Year?" option on the Company tab of the Master Files application.

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PTO Accruals

Recording of Accrued PTO hours is done by entering a PowerForeCast Budget record for each Staff member for which PTO is to be tracked.

ID/NAME	ID/NAME	CODE/DESC.	Total	01/31/11	02/28/11	03/31/11	04/30/11	05/31/11	06/30/11	07/31/11	08/31/11	09/30/11	10/31/11
Staff	Project	Work	Hours	168	160	184	168	176	176	168	184	176	168
Total			240.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00
CLI	/	5:01-06	240.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00

(Figure 3)

In Figure 3, staff member CLI accrues 20 hours per month for each month in the 2011 fiscal year. These budget entries have been made using the Inactive code "PTO Accruals" and have been entered for the first day of each month (see Figure 4).

Staff	Project	Action	Code	Work Date	Control Date	Hours
Total	12					240.00
CLI - Charles L. Inge	/-	5	01-06 - PTO Accruals	01/01/11	01/15/11	20.00
CLI - Charles L. Inge	/-	5	01-06 - PTO Accruals	02/01/11	02/15/11	20.00
CLI - Charles L. Inge	/-	5	01-06 - PTO Accruals	03/01/11	03/15/11	20.00
CLI - Charles L. Inge	/-	5	01-06 - PTO Accruals	04/01/11	04/15/11	20.00
CLI - Charles L. Inge	/-	5	01-06 - PTO Accruals	05/01/11	05/15/11	20.00
CLI - Charles L. Inge	/-	5	01-06 - PTO Accruals	06/01/11	06/15/11	20.00
CLI - Charles L. Inge	/-	5	01-06 - PTO Accruals	07/01/11	07/15/11	20.00
CLI - Charles L. Inge	/-	5	01-06 - PTO Accruals	08/01/11	08/15/11	20.00
CLI - Charles L. Inge	/-	5	01-06 - PTO Accruals	09/01/11	09/15/11	20.00
CLI - Charles L. Inge	/-	5	01-06 - PTO Accruals	10/01/11	10/15/11	20.00
CLI - Charles L. Inge	/-	5	01-06 - PTO Accruals	11/01/11	11/15/11	20.00
CLI - Charles L. Inge	/-	5	01-06 - PTO Accruals	12/01/11	12/15/11	20.00

(Figure 4)

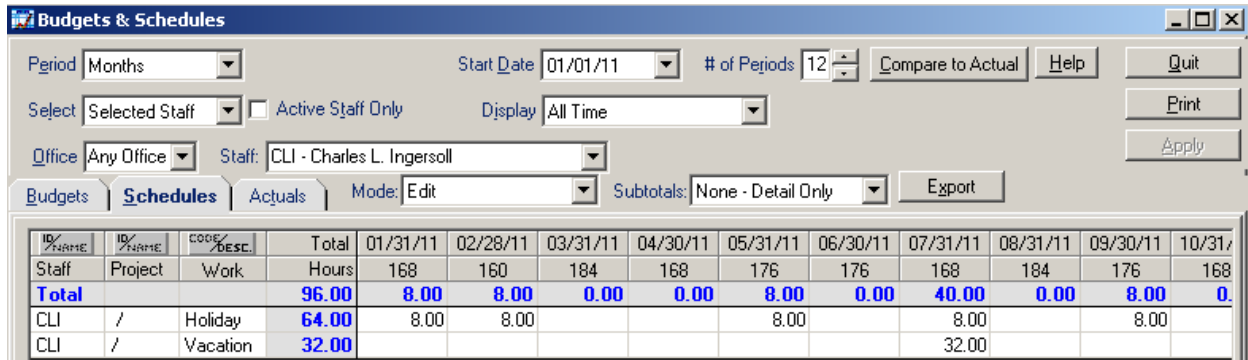
Using the features of PowerForeCast, PTO Accruals can be created for multiple staff with like accrual rates with little data entry required. These records may also be created using the features of PowerImport. PTO Accruals are considered available as of the Work Date assigned to the Accrual record. In this example, Staff member CLI has 20 hours of PTO available as of January 1st, 40 hours available as of February 1st, etc.

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PTO Schedules

Recording of Scheduled PTO hours is done by entering a PowerForeCast Schedule record for each Staff member for which PTO is to be tracked. In this example, 8 paid Holidays are considered part of the scheduled PTO for staff member CLI. These entries are created in the appropriate time periods throughout the year. In addition, staff member CLI has scheduled 32 hours of Vacation time in July giving a total of 96 scheduled PTO hours.



The screenshot shows the 'Budgets & Schedules' window. The 'Period' is set to 'Months', 'Start Date' is '01/01/11', and '# of Periods' is '12'. The 'Staff' is 'CLI - Charles L. Ingersoll'. The 'Mode' is 'Edit'. The table below shows the PTO schedule for CLI.

ID / ZNAME	ID / ZNAME	CODE / DESC	Total	01/31/11	02/28/11	03/31/11	04/30/11	05/31/11	06/30/11	07/31/11	08/31/11	09/30/11	10/31/11
Staff	Project	Work	Hours	168	160	184	168	176	176	168	184	176	168
Total			96.00	8.00	8.00	0.00	0.00	8.00	0.00	40.00	0.00	8.00	0.00
CLI	/	Holiday	64.00	8.00	8.00			8.00		8.00		8.00	
CLI	/	Vacation	32.00							32.00			

(Figure 5)

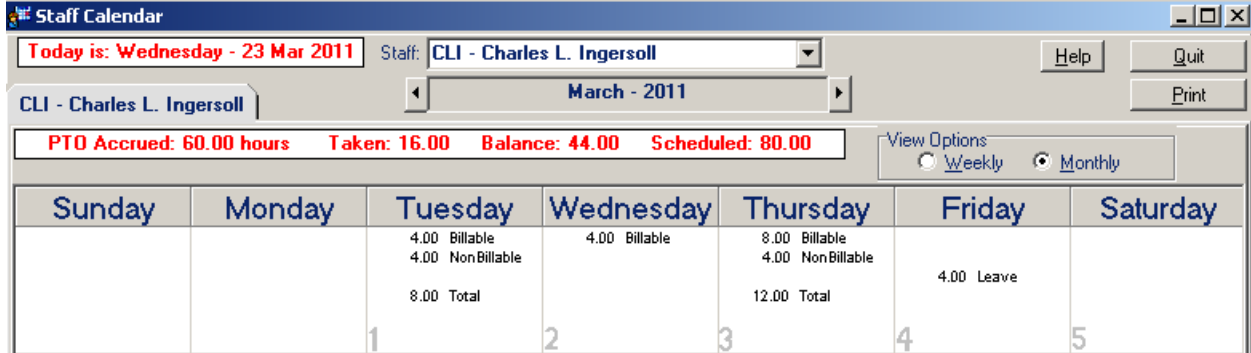
Rules for who can actually schedule a staff member for PTO should be established within the organization. Whether this requires a formal request/approval mechanism is a firm by firm decision and is not part of the PTO tracking feature of PowerPM. Scheduled PTO time records only record expected PTO usage which may or may not actually take place. When a staff member enters time into PowerPM (through Work Entry or via TrakTime), any leave time records which use a designated PTO code are considered as PTO time actually taken and is reported as such within PowerPM.

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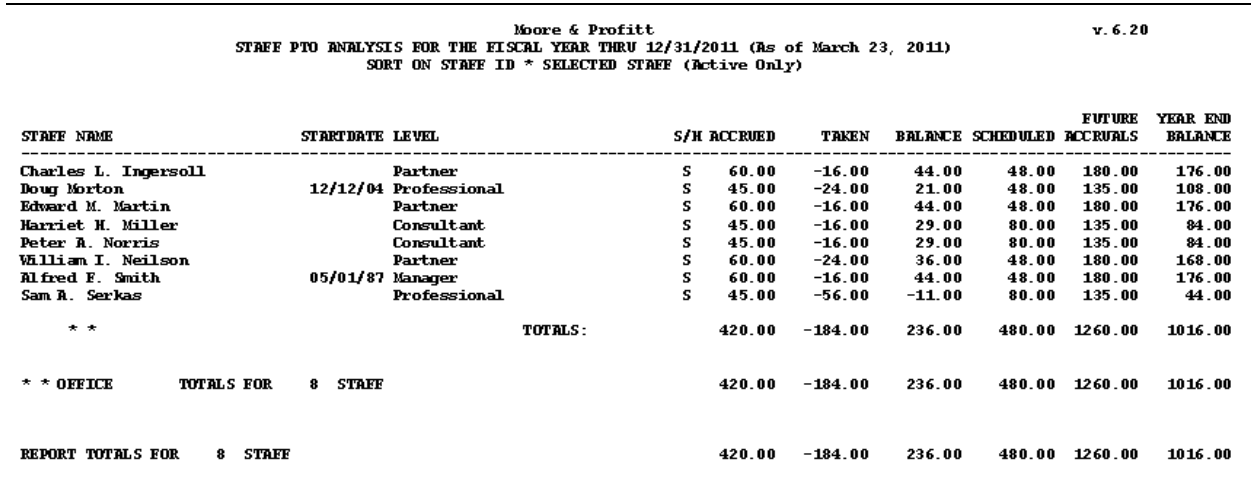
PTO Reporting

Staff may review their individual PTO status using the Staff Calendar or Personal Calendar application. As seen in figure 6, the Monthly view of this application shows the total PTO Accrued to date and PTO time Taken to date with a current PTO Balance and future scheduled PTO values.



(Figure 6)

A Staff PTO report has been added to the Staff Reports menu and provides a comprehensive look a PTO for all or selected staff members.



(Figure 7)

The Staff PTO report also provides an Excel output runtime option which when selected creates an MS Excel spreadsheet that includes the staff selected for reporting on the PM report (see figure 8).

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	A	B	C	D	E	F	G	H	I	J	K
1											
2										Future	Year-End
3	SID	StaffName	StartDate	Level	S/H	Accrued	Taken	Balance	Scheduled	Accruals	Balance
4	AFS	Alfred F. Smith	05/01/87	Manager	S	60.00	(16.00)	44.00	(48.00)	180.00	176.00
5	CLI	Charles L. Ingersoll		Partner	S	60.00	(16.00)	44.00	(48.00)	180.00	176.00
6	DRM	Doug Morton	12/12/04	Professional	S	45.00	(24.00)	21.00	(48.00)	135.00	108.00
7	EMM	Edward M. Martin		Partner	S	60.00	(16.00)	44.00	(48.00)	180.00	176.00
8	HHM	Harriet H. Miller		Consultant	S	45.00	(16.00)	29.00	(80.00)	135.00	84.00
9	PAN	Peter A. Norris		Consultant	S	45.00	(16.00)	29.00	(80.00)	135.00	84.00
10	SAS	Sam A. Serkas		Professional	S	45.00	(56.00)	(11.00)	(80.00)	135.00	44.00
11	WIN	William I. Neilson		Partner	S	60.00	(24.00)	36.00	(48.00)	180.00	168.00
12											
13		TOTALS:				420.00	(184.00)	236.00	(480.00)	1,260.00	1,016.00
14											

(Figure 8)