



ADVANTA 2.0

System documentation

How to configure the system Advanta
Part 3. Setting up labor costs control

Document Version 1.2. (System version 2.2.2.h)

Advanta allows companies using project management techniques to implement their projects and initiatives well, directing them to the objectives and business strategy.

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Setting up processes in Advanta

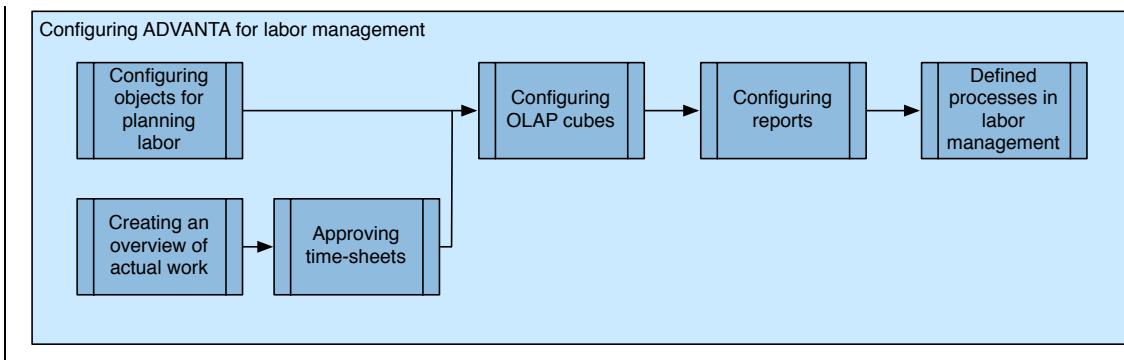
It is assumed that the system is already running and is used in the company, this guide covers the settings for the control effort.

Advanta can be used for planning labor, and to collect the time actually worked, as well as to compare these indicators.

Total labor scheduling logic is shown in materials Knowledge Centre

- Instructions for business processes "Description of the processes UP. Managing Work (Scheme 2)";
- in the article "How easy and convenient loading plan employees through Advanta."

The following Scheme illustrates the general algorithm for controlling the configuration effort.



Also refer to the video lessons on working with resources:

1. Working with Resources - lessons "Capacity Planning human resources in the project" and "Loading resources in the portfolio";
2. Configuring resources - lessons "Lesson 4. Capacity Planning staff" and "Lesson 5. Timesheets time."

Setting up labor planning

Setting objects to auto-planned labor

Planning for labor necessary to define objects for which the system should automatically default planned labor.

In the simplest case, the object must be set to "Task" option "AutoComplete labor" that will automatically fill the planned labor costs of all tasks in the system of 100% load time (8 hours per day) for implementing tasks.

Properties objekta

Save cancel

Name	Task
Description	
Object Type	Task
View initiator	<input type="checkbox"/>
Auto fill labor costs	<input checked="" type="checkbox"/> created tasks
Add to Calendar administrator and participants	Yes
The duration of the silencing	1 days
Check for identical objects	No
Contact with the process	No
Icon	modify remove

However, sometimes it makes sense to share the task of the type, and for some jobs, human resource planning to use, but not for others.

Example 1. The company organizes its own procurement procedures only and control the execution of contracts, and the main work on the project contractors are doing. In this case, it makes sense to separate these types of tasks, and the resources for their own work schedule and work for contractors - disable this feature.

Name	Start	End	Duration	Done	Executor	Resources	Costs
Project complete reconstruction of boiler	January 15, 2013	October 3, 2014	449 days	0	System administrator		544 hours
The project plan	January 15, 2013	October 2, 20...	448 days	0	System administrator		544 hours
✓ Development of automation of the boiler room	January 28, ...	February 14, ...	14 days	0	System administrator	System Administrator [100%]	112 hours
✓ Preparation of tender documentation	January 15, ...	February 28, ...	33 days	0	System administrator	System Administrator [100%]	264 hours
✓ A call for tender	March 1, 2013	March 15, 2013	11 days	0	System administrator	System Administrator [100%]	88 hours
✓ Conclusion of Contract	March 18, 2013	March 28, 2013	9 days	0	System administrator	System Administrator [100%]	72 hours
✓ Adoption work	October 2, 20...	October 2, 2014	1 days	0	System administrator	System Administrator [100%]	8 hours
Contracts with suppliers	05/14/2014	October 3, 2014	103 days	0	System administrator		
Contract automation	July 16, 2014	October 3, 2014	58 days	0	System administrator		
Prepare technical documentation	July 30, 2014	August 5, 2014	5 days	0	System administrator		
Approval documentation	August 6, 2014	September 2...	20 days	0	System administrator		
Delivery of equipment	September 3...	September 1...	10 days	0	System administrator		
Installation	September 1...	September 2...	7 days	0	System administrator		
Balance settings zařízení	September 2...	October 1, 20...	4 days	0	System administrator		
Commissioning	October 2, 20...	October 3, 20...	2 days	0	System administrator		

Example 2.

Projects involve

the execution of a large number of short-time work, but most of the projects carried out in the travel mode. For the head of UP's more important to optimize the resource schedule truck rolls than a detailed plan for each project.

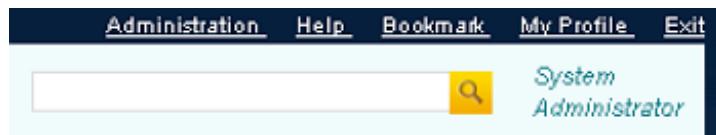
In this case, within the project are two folders - "Project Plan" and "Schedule trips." The second folder with a special type of task "trip" using links (dependencies) a schedule of trips, while trips included for automatic scheduling effort.

Name	Start	End	Duration	Executor	Resources	Costs
Preparation of project automation	05/14/2014	July 10, 2014	42 days	System administrator		88 hours
The project plan	05/14/2014	July 7, 2014	39 days	System administrator		
✓ Preparation of the pre-survey	05/14/2014	05/16/2014	3 days	System administrator		
✓ Coordination Plan	05/19/2014	05/21/2014	3 days	System administrator		
✓ Creating a preliminary project	June 3, 2014	June 11, 2014	7 days	System administrator		
✓ Coordination of project concept	June 12, 2014	June 16, 2014	3 days	System administrator		
✓ Project Development	June 17, 2014	July 7, 2014	15 days	System administrator		
Plan routes	05/14/2014	July 10, 2014	42 days	System administrator		88 hours
✓ Keeping PPO	May 22, 2014	June 2, 2014	8 days	System administrator	System Administrator [100%]	64 hours
✓ Protective project	July 8, 2014	July 10, 2014	3 days	System administrator	System Administrator [100%]	24 hours

Creating an overview of actual work

Create a directory for the collection of actual work

First of all need to add (if there is none) directory "Lists." On the desktop system, go to the "Administration" in the upper right corner.



Next, click on "Directories" and click "Add". Create a directory, similar to the one in the example.

It should be noted parameters: "Use date", "Use the approval process," "Add a section of the resource." Create and add props "Sum" numeric type.

The list of parent objects should be noted the objects of the system, which will keep track of the actual work. It is usually better to specify all existing objects in the system (except in the spirit "whole system").

Binding directory to timecards

system. To do this in the "Administration" go to "General Settings". Downstairs in the control unit settings excluding time click "Edit" drop-down list, select the created directory "Time management" as well as props, "Sum", which will be added to the actual time.

Do not forget to save your changes.

Determining the right to approve timesheets in the system

Advanta provides two variants of the sheet of approval - by functional units, ie for employees, and projects - where a statement is made from the project's work in the context of the project, regardless of affiliation staff departments.

Opportunities for approval on timecards functional units, go to the "Administration" and select "Security". Then click on "Create a new role."

Name	Description
Guide	Assign the role of managers, provide access to the control panel, strategic maps, visions of the future, and other advanced features. Delegated users can create projects.
All users	The ability to track messages

Time	Event
10th 7th 2014 9:25:54	System Administrator has come (a) to the system from remote addresses 192.168.0.1
9. 7. 2014 14:15:53	The system administrator has checked out (a) from the system
9th 7th 2014 11:22:48	The system administrator has checked out (a) from the system

Enter the role name, and description.

Role:

Name of role: Approval of reports

Description of role:
Assigns a role to employees who have the right to approve timesheets working on a functional basis.

Save Back

Click "Save".

Role will be saved and displayed a current list of rights for the role, initially it will be empty. To add a rule, click "Change". Expand the rights of "Real-time attendance records", and put the appropriate permissions.

This group will also need to give approval rights in the handbook "Accounting for time."

Role: Approval of reports

Name of role: **Approval of reports**

Description of role:
Assigns a role to employees who have the right to approve labor time statements on a functional basis.

Rights

[Expand all](#) [Collapse all](#)

Operations directory "Time Management" (3)

	<u>Name</u>
<input checked="" type="checkbox"/>	View a directory entry
<input checked="" type="checkbox"/>	Edit and delete address book entries
<input checked="" type="checkbox"/>	Approval of directory entries

Operations directory "clearing time" (3)

	<u>Name</u>
<input checked="" type="checkbox"/>	View a directory entry
<input checked="" type="checkbox"/>	Approval of directory entries
<input checked="" type="checkbox"/>	Settings / sending requests for data entry to the directory

Check the items permission rights. Click "Save".

Now the role is created and immediately assign specific users or groups of users somehow.

Role: Approval of reports

Name of role: **Approval of reports**

Description of role:
Assigns a role to employees who have the right to approve labor time statements on a functional basis.

Rights

[Expand all](#) [Collapse all](#)

Operations directory "Time Management" (3)

	<u>Name</u>
<input checked="" type="checkbox"/>	View a directory entry
<input checked="" type="checkbox"/>	Edit and delete address book entries
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Operations directory "clearing time" (3)

	<u>Name</u>
<input checked="" type="checkbox"/>	View a directory entry
<input checked="" type="checkbox"/>	Approval of directory entries
<input checked="" type="checkbox"/>	Settings / sending requests for data entry to the directory

User [Add](#) The list is empty

Groups [Alter](#) The list is empty

[Change](#) [Delete role](#) [Back](#)

After assigning users rights timecards for approval the user will appear in the corresponding item.

Adoption records to list from 30. 6. 2014 – 3. 8. 2014

July 2014

	Tue	Wed	Thu	Fri	Sat	Sun
30	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	31	1	2	3
4	5	6	7	8	9	10

Today

Show:

- unsaved
- for approval
- approved
- rejected

Frequency: [Every month](#)

On this page, users report cards are managed, including the approval.

Role: Approval of reports

Name of role	Schvalování výkazu
Description of role	

Rights

[Expand all](#) [Collapse all](#)

- Operations on objects (folders, projects, and tasks) (17)**
- Operations with documents (4)**
- Operations directory "Time Management" (5)**

<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>Name</u>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	View a directory entry
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Create a directory entry
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Edit and delete address book entries
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Approval of directory entries
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Settings / sending requests for data entry to the directory
- Operations directory "Payments dodvateľum" (5)**

In the group of rights transactions handbook "Accounting for time" check permission rights, as in the example. Click save.

After creating the role of the project it will be available for assignment to a particular node of the project tree that allows you to give the right to approve timesheets for each project individually tab handbook "Accounting for time."

Configuring OLAP cubes

Creating OLAP cube

To the ability to use data on planned and actual work in reports, create OLAP cube, in which the data will be collected.

In the "Administration" go to «OLAP-cubes." Create a new cube called "Resources".

Vlastnosti template OLAP-cube

Name	Resources
List	
Icon	modify remove
The number of digits after the decimal point	2

After saving, create three dimensions.

Measurement

Create	
Name	Description
Date	Date
Status of entry	Status of entry
Resources	Resources

Where is the "Date" - the measurement of the "Date" and measurement "Resource" and "record status" based on the system classifiers.

After creating the index measurements, create the "Plan," hours to collect the planned effort.

Indicators for OLAP-cube	Indicators for the adopted budget range
Name: Plan, hours Type of indicator: <input checked="" type="radio"/> Systemic Features: <input checked="" type="checkbox"/> Aggregation, <input type="checkbox"/> Hidden, <input type="checkbox"/> Following the sub-	Data: The planned duration of

Planned number of hours selected from the system parameter "Work", further specify the parameter "Aggregation" to Work automatically summarized in reports.

Next, add the indicator "Real" hours.

Indicators for OLAP-cube		Setting request																					
Name	Real hours	Source	<input checked="" type="radio"/> Directory The actual clock (system)																				
Type of indicator	<input checked="" type="radio"/> Requirement Formula Indicator Increase Systemic	Numerical requirements	Amount																				
Features	<input checked="" type="checkbox"/> Aggregation <input type="checkbox"/> Hidden <input type="checkbox"/> Following the sub-	Criteria	<table border="1"> <thead> <tr> <th colspan="2">Measurement Resources</th> <th colspan="2">Measurement of OLAP-cube</th> </tr> <tr> <td>Status</td> <td></td> <td>Status</td> <td></td> </tr> <tr> <td>Source</td> <td></td> <td>Source</td> <td></td> </tr> <tr> <td>Date of resources</td> <td></td> <td>Data OLAP-cube</td> <td></td> </tr> <tr> <td>Systemic</td> <td></td> <td>Date (exactly)</td> <td></td> </tr> </thead> </table>	Measurement Resources		Measurement of OLAP-cube		Status		Status		Source		Source		Date of resources		Data OLAP-cube		Systemic		Date (exactly)	
Measurement Resources		Measurement of OLAP-cube																					
Status		Status																					
Source		Source																					
Date of resources		Data OLAP-cube																					
Systemic		Date (exactly)																					

Actually employed by the query from the directory "Time management", which is taken from the props "Sum", and the data should be aggregated in case multiple records on actual hours worked will be added to a single task.

Assigning permissions to view the OLAP-cube

Assigning rights to view OLAP-cube may be required if users want to create their own reports to analyze labor without involving the system administrator.

Explicitly assigning the rights to view OLAP-cube is performed for system security roles, user license administrator view is always available.

Add a new role, or open one in which you want to add the right (see "Selecting the right to approve timesheets in the system"). Click "Change". Open block rights "Transaction OLAP-cubes."

Transactions OLAP cubes (Administration) (2)			
Transactions OLAP cubes (4)			
			Name
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Viewing OLAP data "Resources"
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Viewing OLAP data "Calculation of gross wages"
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Viewing OLAP data "Number of entries in the directory"
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Viewing OLAP data "Transactions"

Save **Cancel** **Delete role** **Back**

Note resolution cube called "Resources". This section will be added in the future any OLAP-cubes created in the system.

Configuring Reports

Adding a table report

Based on the established OLAP-cube system allows you to build and save multiple reports.

To create a report, click the "Add account". In the window that appears, select the OLAP-cube "Resources".



Include all types of projects for which data want to display in the report.

What information should be included in the report? (Step 2 of 3)

Tasks:	Projects:	Ingredients:
<input type="checkbox"/> Prac. roads	<input type="checkbox"/> Assets	<input type="checkbox"/> "Unit-form", OAO
<input type="checkbox"/> Commands	<input checked="" type="checkbox"/> Internal projects	<input type="checkbox"/> Catalog
<input type="checkbox"/> Meeting	<input checked="" type="checkbox"/> Project by customer	<input type="checkbox"/> Project
<input checked="" type="checkbox"/> Task		<input type="checkbox"/> Terms partner

Click the "View Report", the system will report the structure of the default. In the pop-up window contains a set of measurements OLAP-cube.

Save the message (Step 3 of 3)

The total sum				
	Operating costs	the actual number of hours	The planned number of hours	
Demo project / instruction OLAP	8	0	1	
Project complete reconstruction of boiler	264	0	2178	
The project plan	72	0	81	
Adoption work	88	0	121	
Preparation of tender documentation	120	0	197	
Conclusion of Contract	552	0	2578	
A call for tender	80	0	100	
Development of automation of the boiler room	56	0	49	
Summary: The project plan				
Contracts with				
Contract automation				
Delivery of equipment				

Then, depending on the purpose of the report, you can structure the data in a certain way.

This you can do by simply dragging the field measurements OLAP-cube ("Date (year)", "date (month)", "Date ()", "resource", "Project") in setting rows or columns of the report.

Column Settings

Author of the record
Record Time
Date
Date (quarter)
Status

View columns as a hierarchy

	Period	Show empty fields	2013												2014											
			January				February				March				Total: 2013				May				June			
Display indicators		Date (year)	Date (Month)																							
<input type="checkbox"/> Project 1	<input type="checkbox"/> Project 2																									
Operating costs		the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours		
<input type="checkbox"/> Demo project / instruction OLAP		Project complete reconstruction of boiler	Preparation of project automation	144	0	915	240	0	1460	160	0	202	544	0	2577					104	0	74	168			
Total: Demo project / instruction OLAP				144	0	915	240	0	1460	160	0	202	544	0	2577	104	0	74	168							

Please note that depending on the selected measurements are obtained completely different purpose reports.

Save the message (Step 3 of 3)

[Save](#) [change](#) [to clarify the choice of cancellation](#) [open group \(0\)](#) [contact with object](#)

Column Settings

Author of the record
Record Time
Date
Date (quarter)
Project

View columns as a hierarchy

	Period	Show empty fields	2013												2014											
			January				February				March				Total: 2013				May				June			
Display indicators		Date (year)	Date (Month)																							
<input type="checkbox"/> Executor																										
Operating costs		the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours		
<input type="checkbox"/> Antonín Dvořák		8	0	1									8	0	1											
<input type="checkbox"/> Macuch Jan																										
<input type="checkbox"/> Petra Kluková		136	0	914	240	0	1460	160	0	202	536	0	2576			104	0	74	168	0	216					
The total sum		144	0	915	240	0	1460	160	0	202	544	0	2577	104	0	74	168	0	216							

You can do a combination of several measurements for more detail information.

Save the message (Step 3 of 3)

[Save](#) [change](#) [to clarify the choice of cancellation](#) [open group \(0\)](#) [contact with object](#)

Column Settings

Author of the record
Record Time
Date
Date (quarter)
Status

lines preview columns as a hierarchy

	Period	Show empty fields	2013												2014											
			January				February				March				Total: 2013				May				June			
Display indicators		Date (year)	Date (Month)																							
<input type="checkbox"/> Project 1	<input type="checkbox"/> Project 2	<input type="checkbox"/> Executor																								
Operating costs		the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours	Operating costs	the actual number of hours	The planned number of hours		
<input type="checkbox"/> Demo project / instruction OLAP		<input type="checkbox"/> Antonín Dvořák	8	0	1								8	0	1											
<input type="checkbox"/> Project complete reconstruction of boiler		<input type="checkbox"/> Petra Kluková	136	0	914	240	0	1460	160	0	202	536	0	2576			104	0	74	168	0	216				
Summary: The project is a comprehensive reconstruction of boiler		<input type="checkbox"/> Preparation of project automation	144	0	915	240	0	1460	160	0	202	544	0	2577			104	0	74	168	0	216				
The total sum			144	0	915	240	0	1460	160	0	202	544	0	2577	104	0	74	168	0	216						

Be sure to install the feature "Show empty ranges" to continuously display all month, despite the lack of data in them.

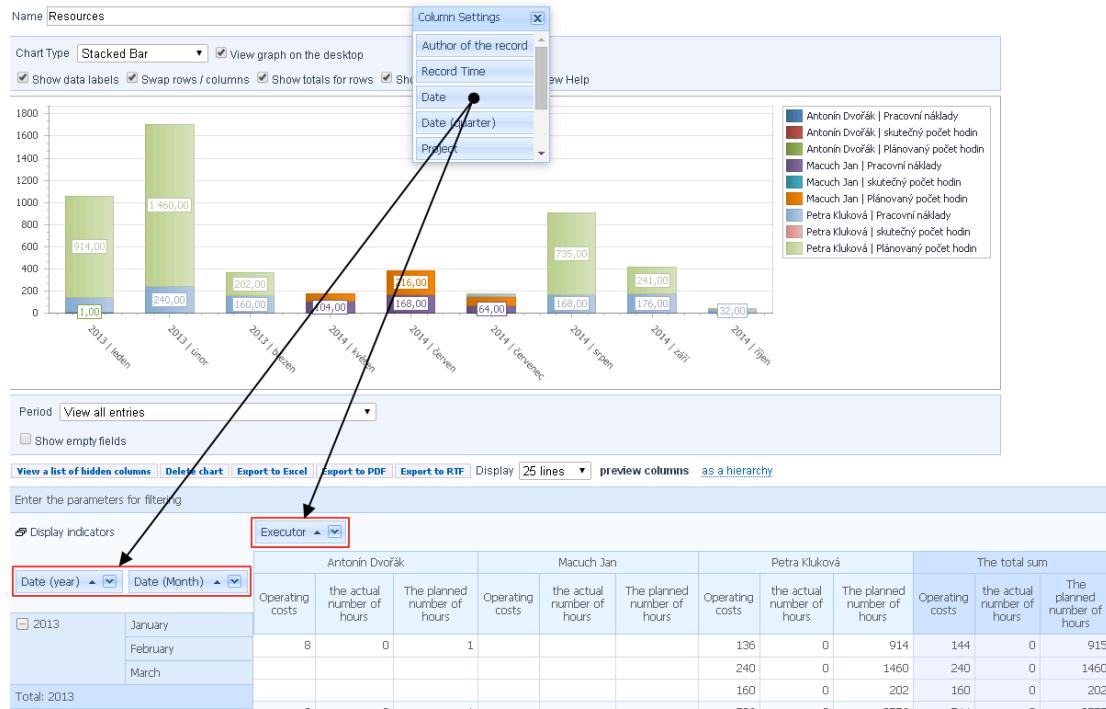
If you want to take your report group, then click a link button "open group". Save the report to the said group, it is immediately available for

use by all users within the group, which granted rights to it.

Adding charts

To form a visual picture of the labor costs can add load graph employees.

To do this, click "Add chart", and then select the chart type. For the analysis of resources typically use histograms or histogram accumulation.



Defined processes in labor management

Planning and accounting actually worked do not necessarily need to be run at the same time, each of them can be run separately from the other, but the most complete picture is obtained while using them to compare plan and fact.

The planning process

Project managers when assigning resources to tasks in the Gantt chart should indicate the planned workload resources to ensure the correctness of data on labor costs.

The obtained data for planning are available in reports and in the Gantt chart itself. Upon detection of an unbalanced load on any resources, project managers need to make adjustments to projects for load balancing.

Accounting process actually worked

The process of collecting evidence provides employees need to report on the actual tasks. This implies that the necessary administrative and ensure that the following provisions:

1. All tasks performed by employees must be recorded in the system. Besides design problems should be placed orders, which must be prescribed tree structure projects (see the manual of instructions can be found at [link](#)).
2. Employees need to add tasks to your table and make problems for data on elapsed time. Every week or month for the previous employees should send their report cards for approval. For this it is necessary to develop internal rules on how to perform this procedure.
3. Must be assigned to one or more employees who accept and approve the report cards. Procedure for approval may be provided in the same regulations as the reporting staff.
4. Employee motivation system must necessarily be linked to the completion and approval procedures timesheets.

Order services for configuring the system

This booklet highlights key questions regarding setting up solutions based on system Advanta.

Additionally, you can always order from us advice on how to configure solutions for your enterprise.

Our contacts

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The demo version of the system and a description of other functional solutions are available at: **<http://www.advanta-group.cz>**