



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.

www.advanta-group.cz

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Setting up processes in Advanta

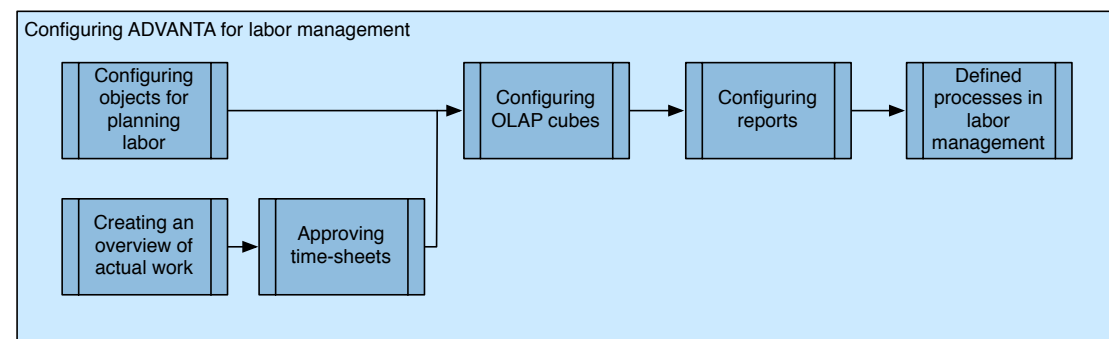
It is assumed that the system is already running and is used in the company, this guide covers the settings for the control effort.

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 objektu

[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, 2014	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, 2014	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, 2014	4 days	0	System administrator		
Commissioning	October 2, 2014	October 3, 2014	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.

General properties directory

[alter](#)

Name Bookkeeping

Description

Use date Yes, manual entry

Used in the approval process Yes

Used procedure requirements It is not

Connect with directory objects It is not

Add out by source Yes

Bookmark icon [modify](#) [remove](#)

The directory structure

[alter](#)

The structure of directory entries Horizontal list

Instead of displaying a list of records On the Address Book tab

The form of the input record Pop-up window

Requisites

[Add](#)

	Name	Type	Mandatory	AutoSum	Average	Display
	Status	Taxonomist	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
	Date	Date	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
	Suma (CZK)	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Recourses	Line	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>

[Edit](#) [Delete](#)

Parent objects

[Alter](#)

Name	Directory Properties
Construction	Viewing and entering data
Task	Viewing and entering data

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.

Setting time tracking

[Alter](#)

Directory Time Management

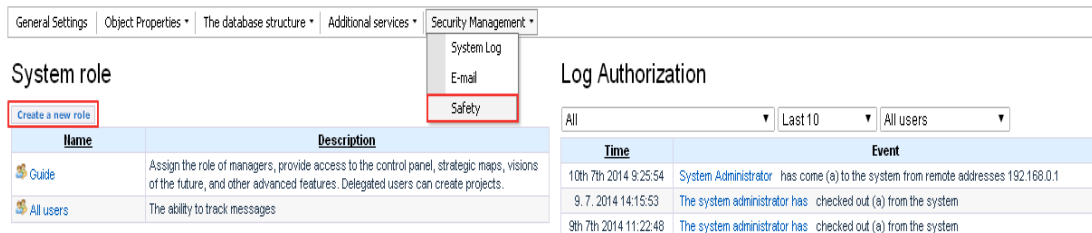
Primetime * Amount

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."

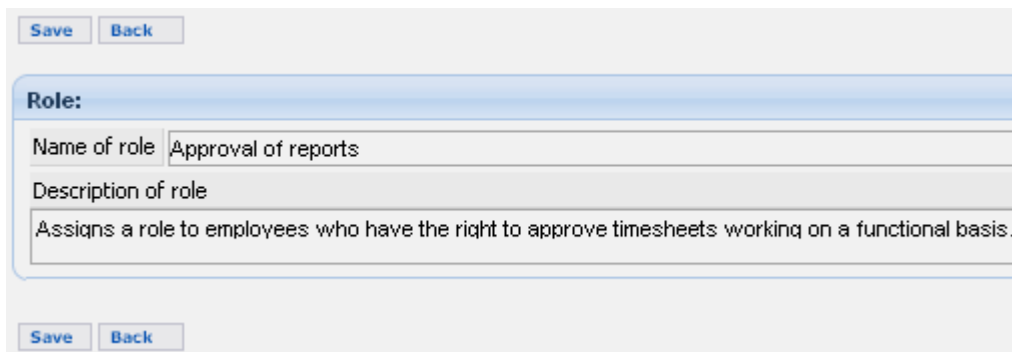


The screenshot shows the 'Security Management' menu with 'System Log', 'E-mail', and 'Safety' options. The 'System role' section has a 'Create a new role' button. The 'Log Authorization' section shows a table of system events.

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.



The form shows the 'Role' section with fields for 'Name of role' and 'Description of role'. The 'Name of role' field contains 'Approval of reports' and the 'Description of role' field contains 'Assigns a role to employees who have the right to approve timesheets working on a functional basis.'.

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 have the right to approve labor time statements on a functional basis.

Rights

Expand all Collapse all

Operations directory "Time Management" (3)

	Name
<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)

	Name
<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 have the right to approve labor time statements on a functional basis.

Rights

Expand all Collapse all

Operations directory "Time Management" (3)

	Name
<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)

	Name
<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.

KOMIX Effective project management ADVANTA

Create MY WORK today TEAM personally ORGANIZATION and projects STRATEGY development OBJECTIVES and vision

PEOPLE LIST ORGANIZATIONAL STRUCTURE STATEMENTS

System Administrator

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

July 2014

after	Tue	st	Th	Fri	with	no
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

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 checked="" type="checkbox"/>	Name
<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 dodvatelům" (5)

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

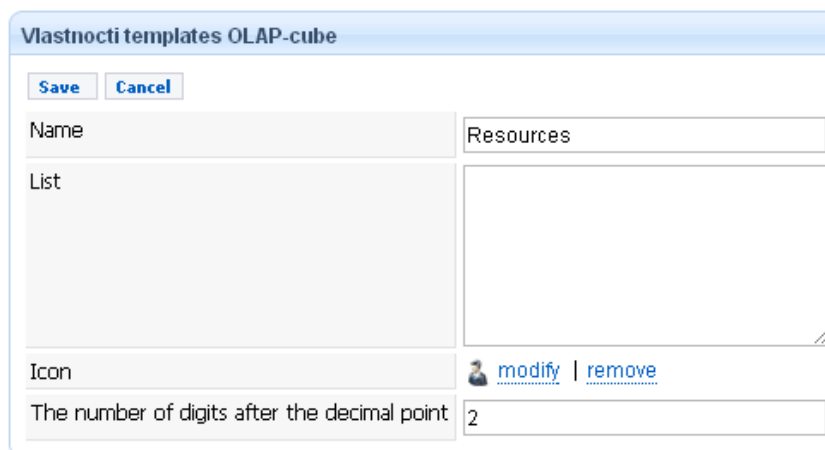
After creating the role of the project it will be available for assignment to a particular node of the project tree that allows you to give the right to approve timesheets for each project individually tab handbook "Accounting for time."

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".

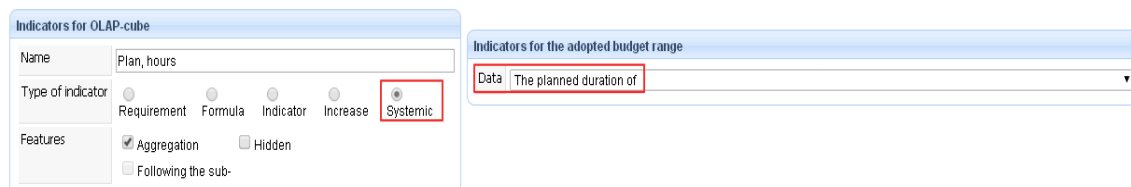


After saving, create three dimensions.

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.



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.

Save Delete go to OLAP-cube

Indicators for OLAP-cube

Name: Real hours

Type of indicator: Requirement

Features: Aggregation

Setting request

Source: Directory

Numerical requirements: Amount

Criteria:

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 type="checkbox"/>	<input type="checkbox"/>	Viewing OLAP data "Calculation of gross wages"
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Viewing OLAP data "Number of entries in the directory"
<input type="checkbox"/>	<input 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)

View the statement [cancellation](#) [choose to manually](#) [back](#)

Tasks:

- ☐ Prac. roads
- ☐ Commands
- ☐ Meeting
- ☐ Task

Projects:

- ☐ Assets
- ☒ Internal projects
- ☒ Project by customer

Ingredients:

- ☐ "Unit-form", OAO
- ☐ Catalog
- ☐ Project
- ☐ 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)

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

Name: Resources

Period: ☐ Show empty fields

[View a list of hidden columns](#) [Add graph](#) [Export to Excel](#) [Export to PDF](#)

Enter the parameters for filtering

☒ Display indicators

Column Settings

- Author of the record
- Record Time
- Date
- Date (quarter)
- Date (Month)

Enter the column values

The total sum			
Operating costs	the actual number of hours	The planned number of hours	
8	0	1	
264	0	2178	
72	0	81	
88	0	121	
120	0	197	
552	0	2578	
Summary: The project plan			
80	0	100	
56	0	49	

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.

Name: Resources

Period: View all entries

Show empty fields

View a list of hidden columns | Add graph | Export to Excel | Export to PDF | Export to RTF

Enter the parameters for filtering

Display indicators

Date (year) | Date (Month)

Column Settings: Author of the record, Record Time, Date, Date (quarter), Status

View columns as a hierarchy

		2013									Total: 2013			2014		
		January			February			March								
		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
Project 1	Project complete reconstruction of boiler	144	0	915	240	0	1460	160	0	202	544	0	2577			
Project 2	Preparation of project automation													104	0	74
Total: Demo project / instruction OLAP		144	0	915	240	0	1460	160	0	202	544	0	2577	104	0	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](#)

Name: Resources

Period: View all entries

Show empty fields

View a list of hidden columns | Add graph | Export to Excel | Export to PDF | Export to RTF

Enter the parameters for filtering

Display indicators

Date (year) | Date (Month)

Column Settings: Author of the record, Record Time, Date, Date (quarter), Project

View columns as a hierarchy

		2013									Total: 2013			2014		
		January			February			March								
		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
Executor																
Antonín Dvořák		8	0	1							8	0	1			
Macuch Jan														104	0	216
Petra Kluková		136	0	914	240	0	1460	160	0	202	536	0	2576			
The total sum		144	0	915	240	0	1460	160	0	202	544	0	2577	104	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](#)

Name: Resources

Period: View all entries

Show empty fields

View a list of hidden columns | Add graph | Export to Excel | Export to PDF | Export to RTF

Enter the parameters for filtering

Display indicators

Date (year) | Date (Month)

Column Settings: Author of the record, Record Time, Date, Date (quarter), Status

View columns as a hierarchy

		2013									Total: 2013			2014		
		January			February			March								
		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
Project 1	Project complete reconstruction of boiler	8	0	1							8	0	1			
Project 2	Preparation of project automation	136	0	914	240	0	1460	160	0	202	536	0	2576			
Executor	Summary: The project is a comprehensive reconstruction of boiler	144	0	915	240	0	1460	160	0	202	544	0	2577			
	Macuch Jan													104	0	
Total: Demo project / instruction OLAP		144	0	915	240	0	1460	160	0	202	544	0	2577	104	0	

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

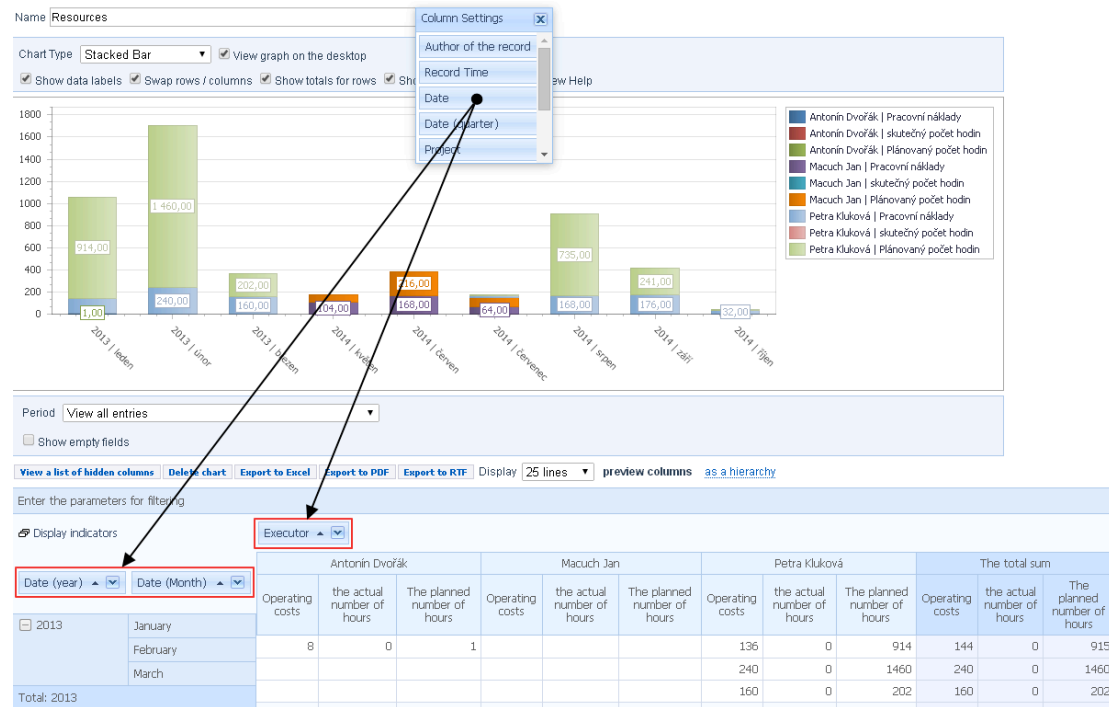
If you want to take your report group, then click a link button "open group". Save the report to the said group, it is immediately available for

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>**