

Professional PTO

Product Guide and FAQ

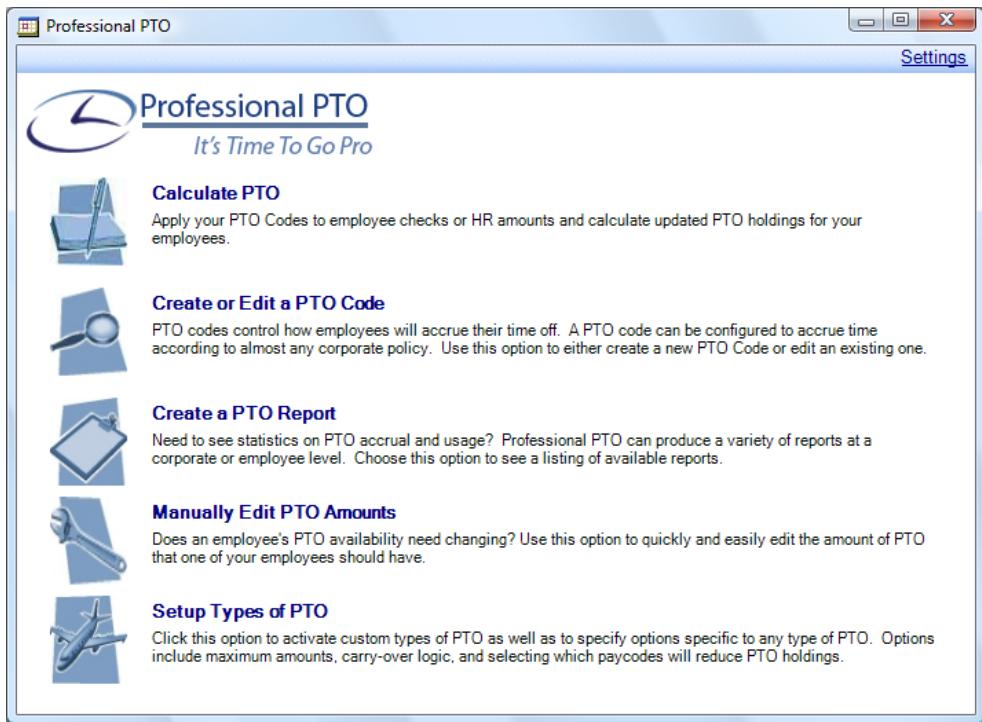


GREENSHADES
— *Let Us Handle That* —

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General Overview

About Professional PTO

Greenshades Professional PTO has a full suite of reporting options for both the Employee and the PTO Administrator. Professional PTO allows operators to create PTO Codes (much like Paycodes or Timecodes) and assign them to employees or employee classes. These PTO Codes provide great flexibility in creating PTO accrual rates. The operator can set up accrual based on the traditional hourly method (for every hour worked, an employee will accrue a fraction of that hour of PTO), or may simply set up how much PTO should be accrued for any unit of work performed (i.e.: for every 14 days worked, an employee gets 1 day of PTO).

In addition to enhanced functionality for creating PTO accrual rates, Professional PTO supports 'Rules Based PTO'. This means that you can apply the same PTO Code to two different employees, but because of various factors, they will accrue PTO at different rates. For instance, your company could award 2 weeks of PTO per year for every employee who has worked at the company for 1 year, but 3 weeks if they've worked for a greater amount of time. In this case, you could set up two different PTO codes and apply them to each group of employees, or you could set up one PTO code for all employees and make it a variable rate code. You would then specify that you want different rates based on length of employment and specify the different rates. You can specify different employee classifications based on a number of factors, including number of hours worked in a week or pay-period, length of employment with the company, and average hours/days worked over a past time span.

Requirements for Professional PTO

The Greenshades Center does have prerequisite requirements in order to function properly. First, the Greenshades Center requires an active internet connection. We require this so that we can ensure that the files we create comply with the very latest government regulations. Greenshades does not offer an “Offline Mode” or any way to operate without an active internet connection.

The Greenshades Center can be configured to authenticate with a corporate proxy server, but it is our client’s responsibility to ensure that adequate internet access is provided to the Greenshades Center. For information on setting up Greenshades with your Proxy Server or Firewall, please see our Firewall Guide available at: <http://www.greenshades.com/pub/downloads/documentation/firewallguide.pdf>

Professional PTO requires the Microsoft .NET Framework version 2.0 or later. You can download it from Microsoft by clicking [here](#).

Installation and Initial Setup

If you have not already downloaded and installed Professional PTO, you can begin this process by clicking [here](#), and then selecting the ‘Download Professional PTO’ link.

You will also find a user guide for installing Professional PTO from that same page.

Starting Professional PTO

Run Professional PTO from Dynamics GP version 8.0 and above by navigating from the top bar menu through Tools > Routines > Payroll > Professional PTO. The Professional PTO calculation process will also automatically launch each time you calculate checks within Dynamics GP.

Calculate PTO

In general the PTO calculation process will begin automatically every time you calculate checks within Dynamics GP. However, there may be occasions when you need to manually calculate PTO balances. This feature provides you with the ability to calculate PTO a variety of different options, including calculating PTO from current PTO capture, current payroll checks, past checks from history, and time and attendance from HR module.

Create or Edit a PTO Code

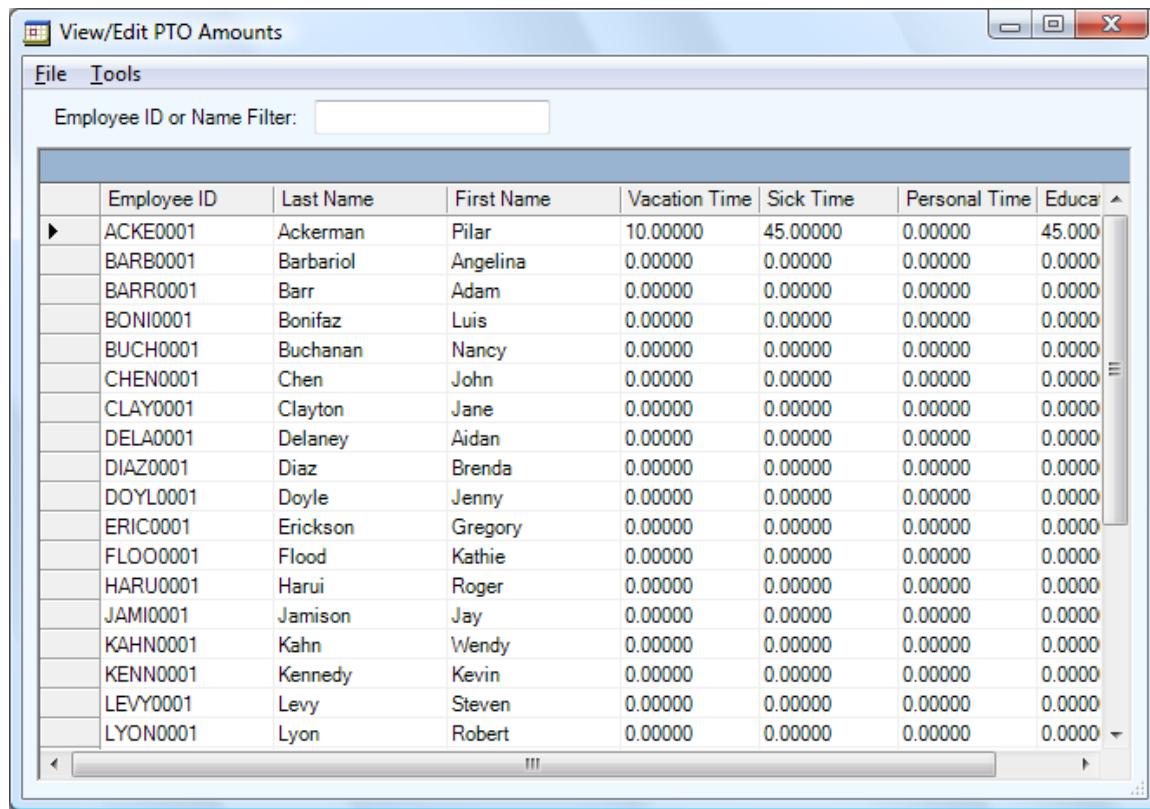
As your PTO policy changes you will need to modify existing PTO codes or add additional codes. You will complete both these tasks using this option. More information on these topics can be found in the [Edit Existing PTO Code](#) and [Creating New PTO Codes](#) sections of this guide.

Create a PTO Report

This feature will provide you with a variety of helpful reports, including company-wide reports, employee specific reports, and breakout reports. These reports can be very helpful in determining why an employee has a specific PTO balance.

Manually Edit PTO Amounts

Professional PTO provides the ability to manually edit an employee's time available, and manually override any limitations set in place. **NOTE:** When manually editing data, please be sure to edit the data with Professional PTO. Updating the employee cards will not update Professional PTO.



The screenshot shows a Windows application window titled "View/Edit PTO Amounts". The window has a menu bar with "File" and "Tools" options. Below the menu is a search bar labeled "Employee ID or Name Filter:" with a text input field. The main area is a data grid with the following columns: Employee ID, Last Name, First Name, Vacation Time, Sick Time, Personal Time, and Education. The data grid contains 20 rows of employee information, each with a unique Employee ID and corresponding names and PTO values. The grid has scroll bars on the right and bottom.

| | Employee ID | Last Name | First Name | Vacation Time | Sick Time | Personal Time | Education |
|---|-------------|-----------|------------|---------------|-----------|---------------|-----------|
| ▶ | ACKE0001 | Ackerman | Pilar | 10.00000 | 45.00000 | 0.00000 | 45.00000 |
| | BARB0001 | Barbariol | Angelina | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | BARR0001 | Barr | Adam | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | BONI0001 | Bonifaz | Luis | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | BUCH0001 | Buchanan | Nancy | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | CHEN0001 | Chen | John | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | CLAY0001 | Clayton | Jane | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | DELA0001 | Delaney | Aidan | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | DIAZ0001 | Diaz | Brenda | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | DOYL0001 | Doyle | Jenny | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | ERIC0001 | Erickson | Gregory | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | FLOO0001 | Flood | Kathie | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | HARU0001 | Harui | Roger | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | JAMI0001 | Jamison | Jay | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | KAHN0001 | Kahn | Wendy | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | KENN0001 | Kennedy | Kevin | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | LEVY0001 | Levy | Steven | 0.00000 | 0.00000 | 0.00000 | 0.00000 |
| | LYON0001 | Lyon | Robert | 0.00000 | 0.00000 | 0.00000 | 0.00000 |

Selecting this option will display a list of your employees and their current PTO balances. To sort by any column simply select the top cell of the appropriate column. You can also search for a specific employee by typing in their name or employee id in the Employee ID or Name Filter box at the top of this screen.

You can change any PTO amounts within this screen. To update your employee cards within Dynamics click File and select Save, check the 'Update Great Plains Cards with all PTO values' box and click the Save button. If you do not wish to update your employee cards, just click File and select Save and Exit.

Setup Types of PTO

Professional PTO natively supports 6 types of PTO, these include, Vacation, Sick, Personal, FMLA, Family Time, and Educational. In addition, Professional PTO can support up to 3 custom types of PTO.

Using the ‘Set up Types of PTO’ option will guide you through setting up information vital to properly setting up your PTO types. The following definitions will help to clarify what information is needed when setting up PTO.

VAC

Friendly Name: **Vacation Time**

Description: **Vacation Time Off**

PTO Maximums

Below are the maximum rules set up for this PTO Type. If an employee falls into more than one category, the more restrictive rule is used.

| Emp Class | Minimun Years Exp | Maximum Years Exp | Maximum Hours |
|-----------|-------------------|-------------------|---------------|
| | | | |

[Click to edit maxes](#)

PTO Carry-Over

Below are the carry-over rules set up for this PTO Type. If an employee falls into more than one category, the more restrictive rule is used.

| Emp Class | Min Exp | Max Exp | Carry Over Date | Amount | Type |
|-----------|---------|---------|------------------------------|--------|---------|
| ► ALL | 0 | 99 | At Beginning of Calendar Yea | 50 | Percent |

[Click to edit carry-over](#)

Reducing Codes

Below are all of the paycodes that reduce this type of PTO. [Click here to edit this list](#).

| |
|------|
| PRFT |
|------|

Issue PTO

Professional PTO allows employees to instantly accrual of PTO time. If you wish to give some of your employees an amount of PTO, use the link below.

[Instantly Accrue PTO](#)

Apply Carry-Over

If you would like to immediately apply carry-over logic to one or more employees, you can do so by using the link below.

[Instantly Apply Carry-Over](#)

Maximum Rules

By default, a PTO Code has no logic built in for maximum amounts of PTO. If you wish to add or edit maximum logic, you will need to click the link that says “Click to edit maxes.” Doing so will present you with all of the maximum rules that are currently associated with your type. You can add or delete rules and may specify a specific employee class as well as a years of experience range. For instance, you could specify that employees from your SUPP class that have been with the company between 1 and 3 years may earn at most 80 hours of PTO. You may make as many rules as you wish for any specific type; if an employee is ever eligible for more than one rule, the more restrictive rule will be used.

Carry Over Rules

Carry Over rules are much like maximum rules, except that in addition to specifying an employee class and years of experience range, you must also specify how carry over will be calculated (as a percentage or raw amount) as well as when carry-over should take place. You may add as many rules per type as you wish; if an employee is ever eligible for more than one rule, the more restrictive rule will be used.

PTO Reducing Paycodes/Timecodes

In addition to accruing PTO, Professional PTO will also allow you to specify how your employees’ PTO should be reduced. Specifically, you may specify that any paycode or timecode is ‘reducing’ to a type of PTO. Whenever Professional PTO sees that an employee has been assigned that code, it will reduce the amount of PTO that is available.

Instant Accrual

Some companies wish to have their employees automatically accrue and reduce PTO whenever a specific paycode or timecode is used. For instance, if every employee is given 8 hours for a holiday, they may wish to use a specific holiday code and then see that each of their employees has used 8 hours of vacation PTO in their reports. You may specify any timecodes or paycodes as instant accrual codes for just that purpose.

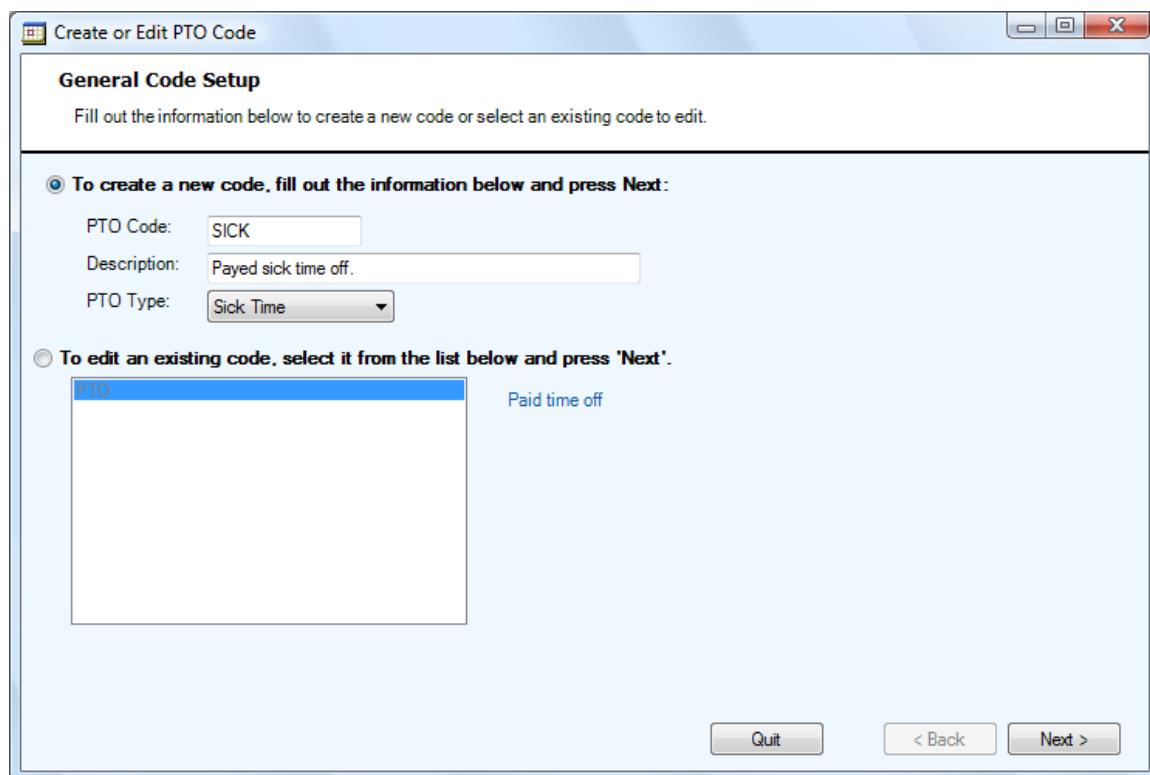
Configuration

This section is intended to provide you with the needed information to configure Professional PTO to accrue PTO accurately. This section is not intended to be linear and is intended to provide detailed information regarding the screens within Professional PTO. Professional PTO supports integrations with Great Plains through both U.S. Payroll and Human Resources. Accordingly, all content will apply to both methods although some screens may appear slightly differently.

PTO Codes

At the heart of Professional PTO are PTO Codes. PTO Codes contain the logic that is ultimately responsible for accruing time based off your corporate policy. PTO codes are often compared to paycodes and are indeed a similar construct. The goal of a PTO code, when finished, will be to accrue PTO according to specific rules for all employees to which the code is applied.

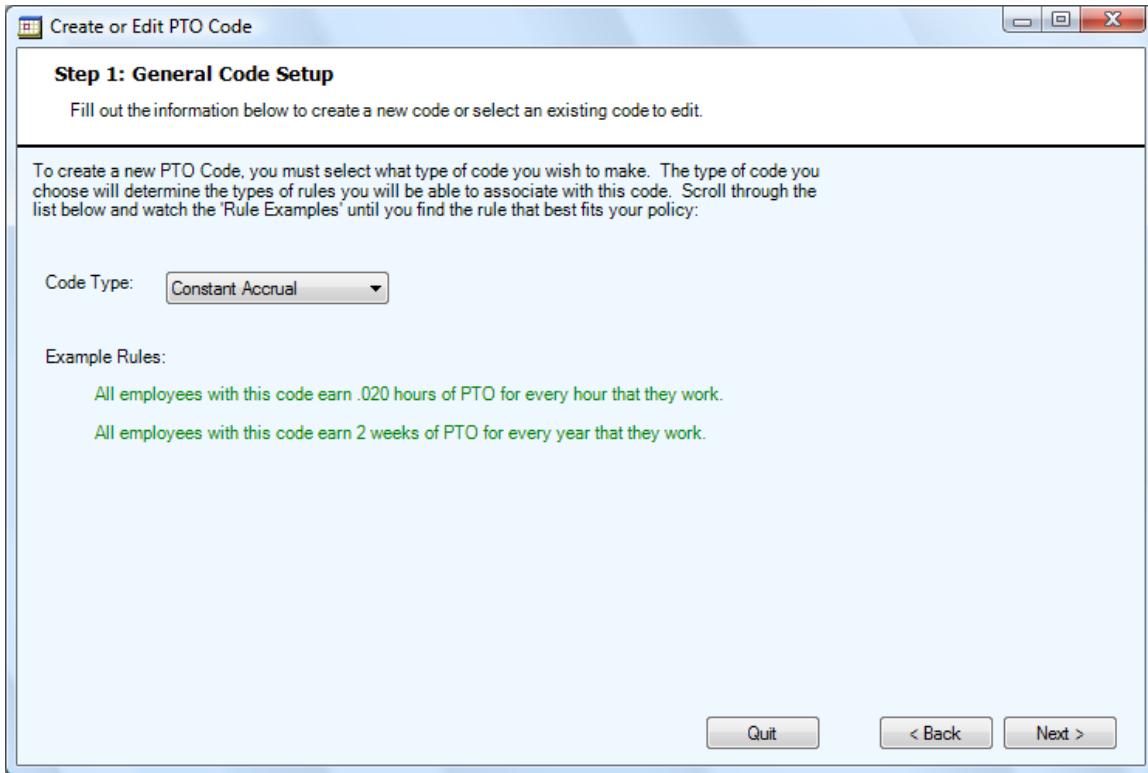
Creating new PTO Codes



Step 1 - General Code Setup

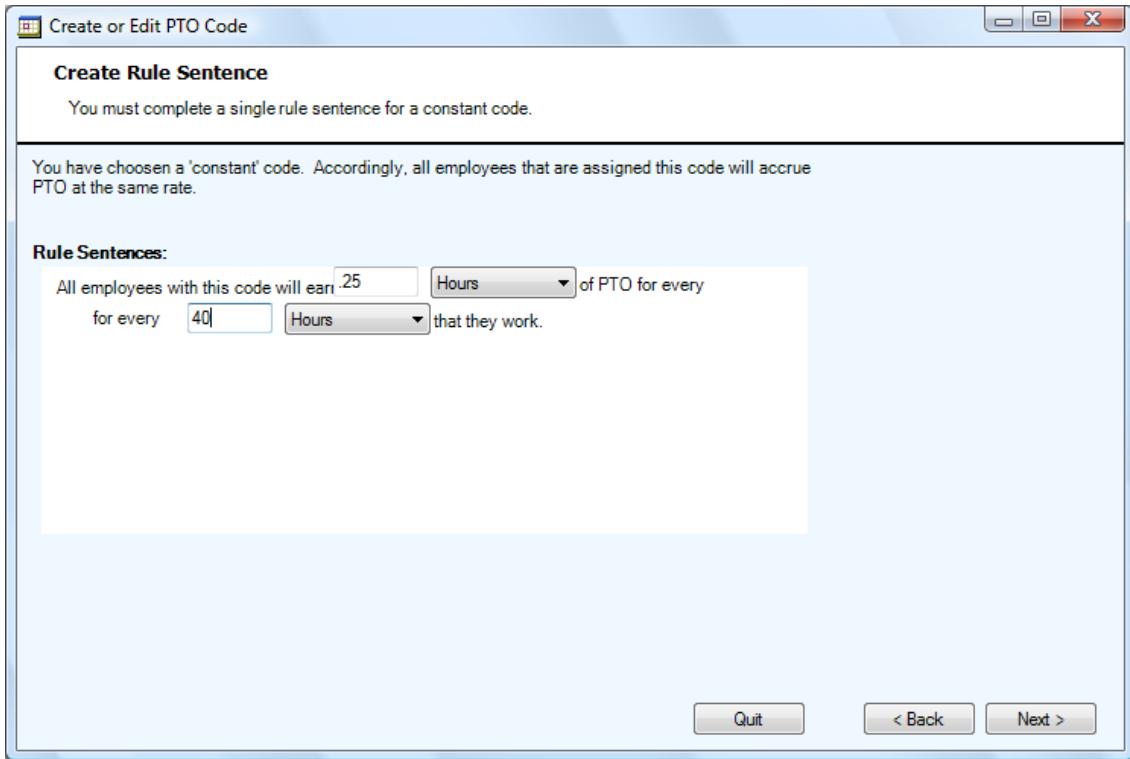
On this screen provide the following information:

- PTO Code: A unique abbreviation for this code (ex. 'FTSICK')
- Description: A description to reference later for this PTO code (ex. 'Sick Time for Full Time Emps.')
- PTO Type: The type of PTO this code should accrue. (Vacation, Sick, FMLA, etc. To create a custom type, please see 'Creating Custom Types of Time').



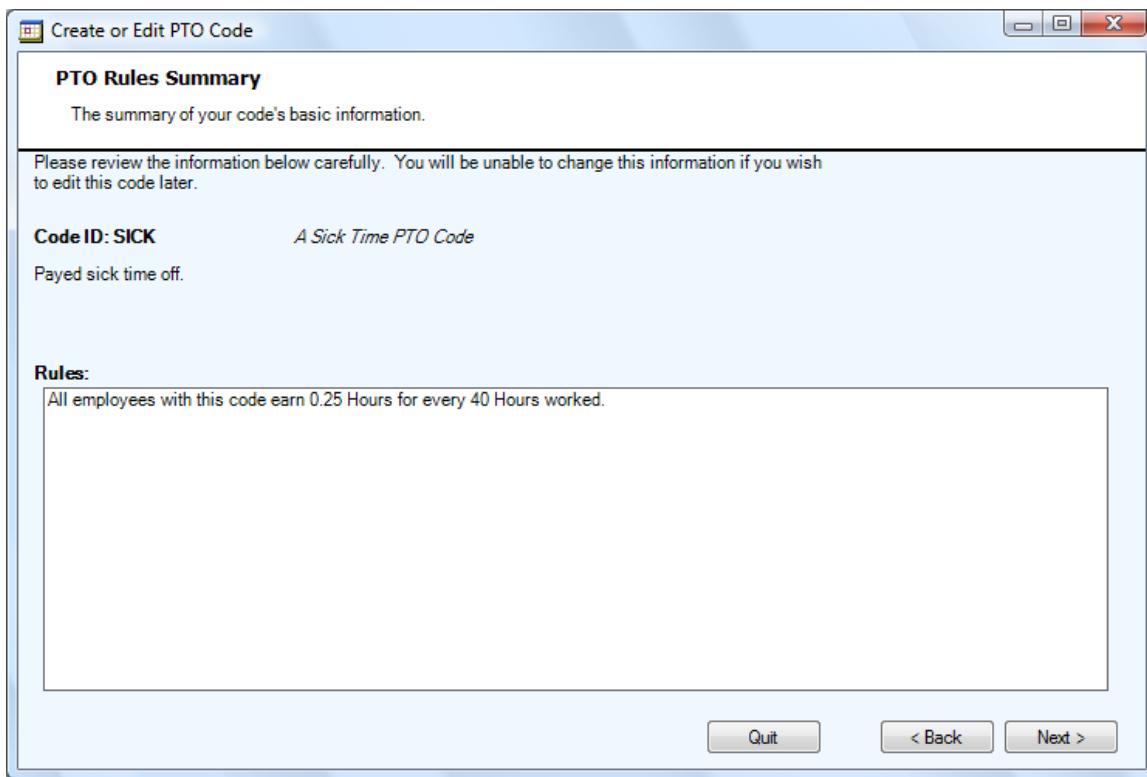
Step 2 - Code Type

How your PTO is accrued for this Code is defined by its type. Professional PTO currently supports 4 types of accrual: **Constant, Rate Based, Years of Experience, and Average Rate**. You can find examples of each type by selecting them in the Code Type drop down list. Once you have made your selection, click next.



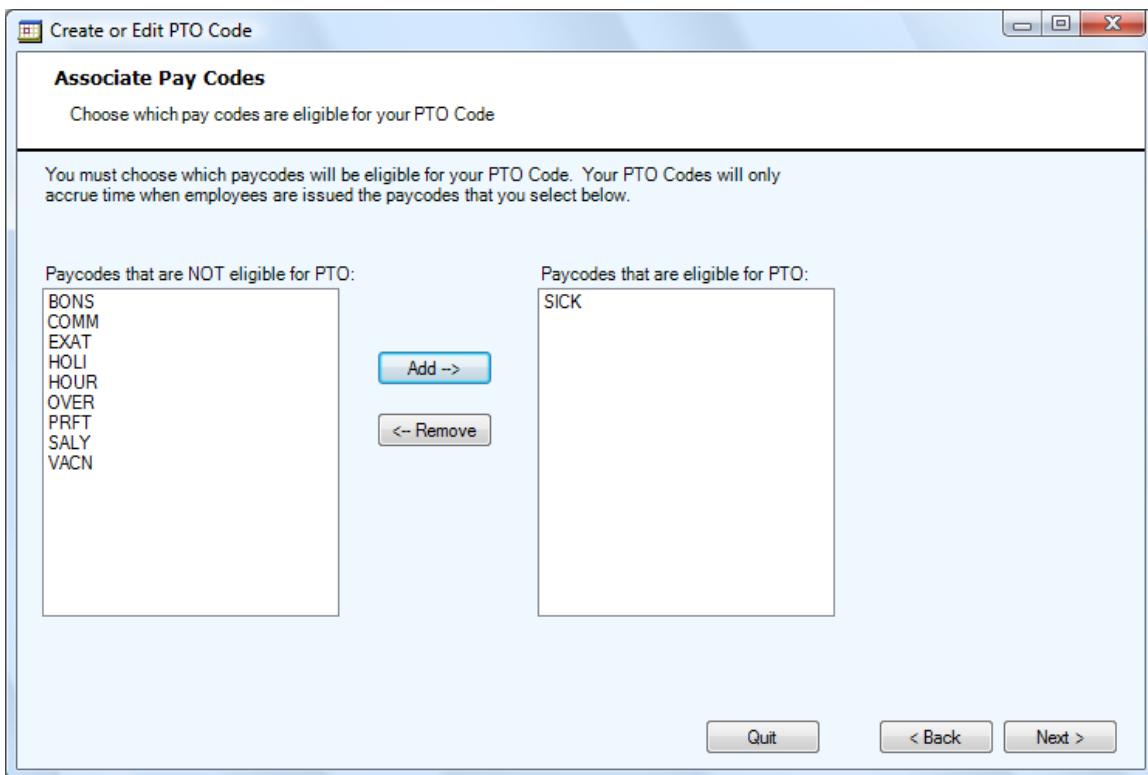
Step 3 - Rule Sentence/Rate Amounts

In order to accrue PTO, each PTO code must be given rules to use. For each employee to whom the code is applied, the PTO Code will select the appropriate rule from its set of PTO rules and accrue PTO accordingly. Depending on what type of rule you picked, the rule sentences screen will appear differently. If you picked a constant rule, for instance, you will create a simple sentence that assigns a set amount of PTO regardless of circumstance. A rate base code will require that you specify different accrual schedules for different amounts of work performed. Depending on the rule type, you may need to complete one or two screens in order to finish crafting your 'rule sentences'. The easiest way to complete these screens is to simply look at the rule sentences and make sure that they read the same way your PTO plan does. Professional PTO was built around the concept of using natural language as much as possible.



Step 4 - PTO Rules Summary

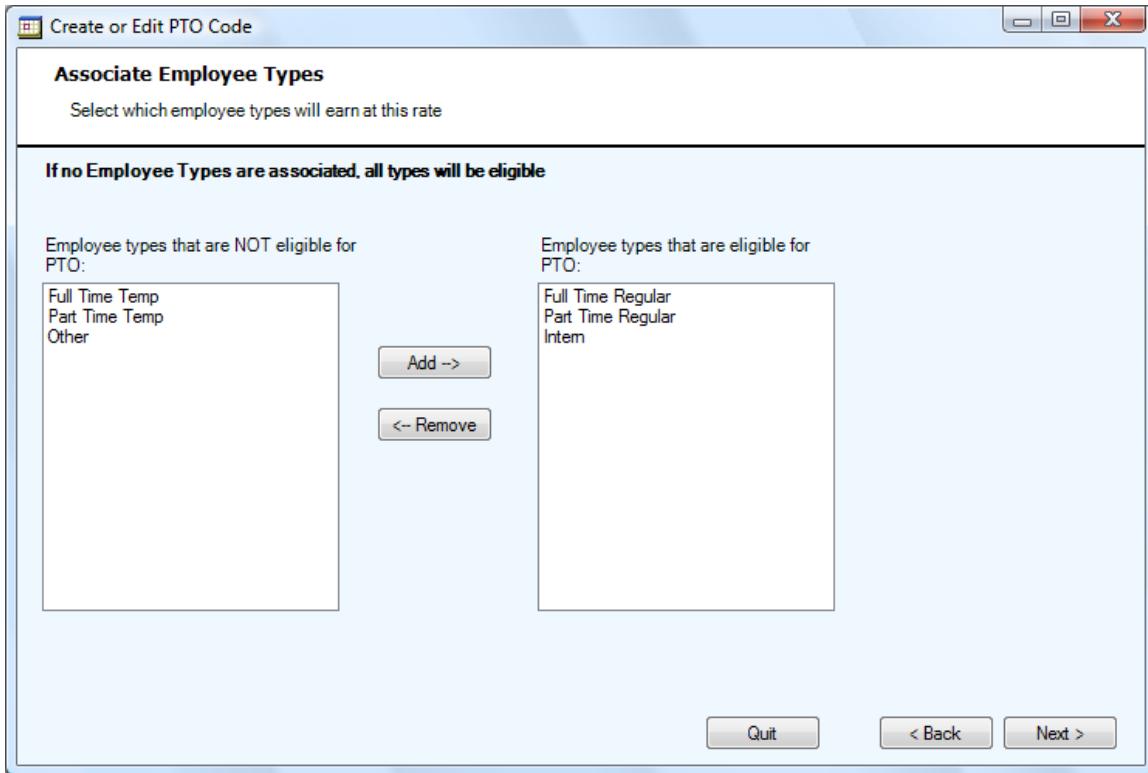
The PTO Rules Summary is simply a recap of the rules you have specified, written out in plain English. If you are satisfied with the summary, click next. If you have found a mistake, you can click the back button and make corrections.



Step 5 – Associate Pay Codes

Once you have reviewed your current PTO code setup you will specify the Paycodes/Timecodes which will count towards your rules. To add Paycodes that are eligible to accrue this type of PTO, highlight the appropriate paycode and click Add. To remove eligible paycodes, highlight the appropriate paycode and click Remove.

Once you are satisfied with your selections, click ‘Next’.



Step 6 – Associate Employee Types

Here you will be able to specify which employee types are eligible for the PTO code you are editing. To add employee types that are eligible to accrue this type of PTO, highlight the appropriate employee type and click Add. To remove eligible employee types, highlight the appropriate employee type and click Remove. You can choose any number of types you would like to have this code apply to.

Once you are satisfied with your selections, click 'Next'.

Create or Edit PTO Code

Additional Code Details

Finally, specify some additional information about your PTO Code.

Start Date
This code starts applying years after the employee's

End Date
This code stops applying years after the employee's

Waiting Period
Employees don't earn PTO until days after the code's start date.
Employees can't use PTO until days after the code's start date. Rolling annual wait period

Hours Per Day
How many hours should an employee receive when they accrue a 'day' of PTO with this code?

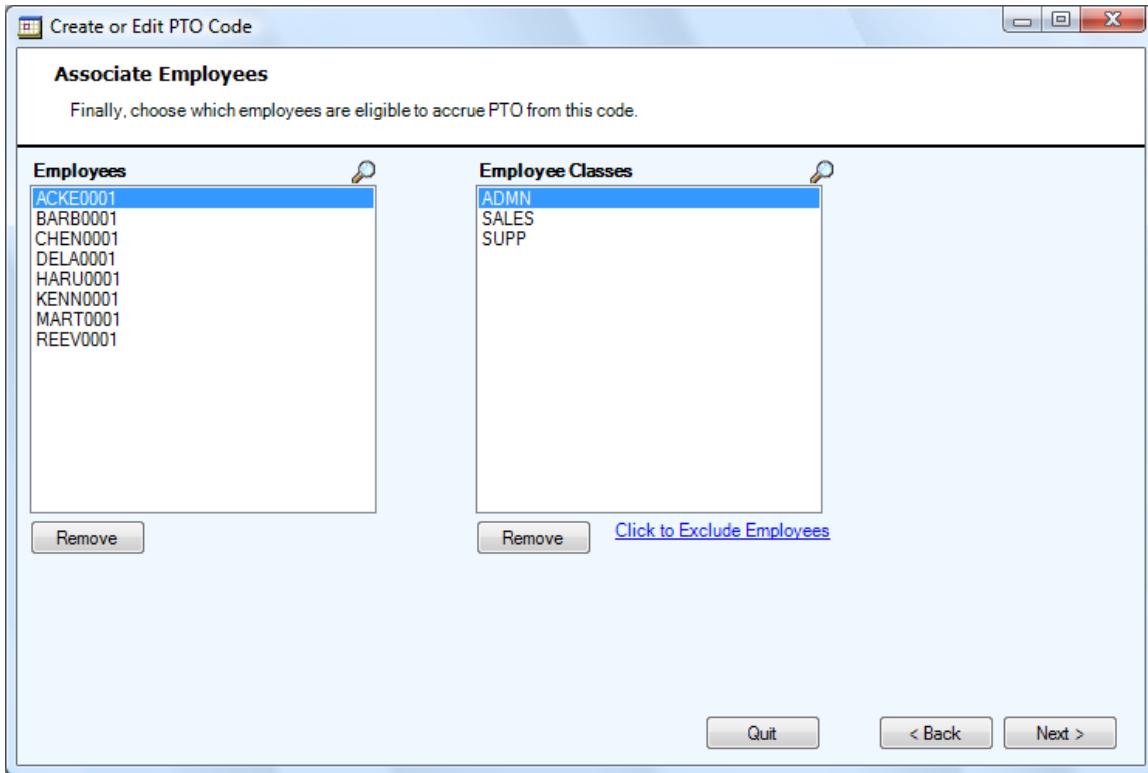
Accrue Incrementally
If an employee is supposed to earn 1 day of PTO for every month worked, how much PTO should he have after half a month?

None-- PTO is available only after the time span I specified. (Default)
 Half a day-- PTO is available incrementally during time span.

For codes that accrue PTO per pay-period, is there a minimum threshold or a maximum number of hours for employee accrual?
Leave Blank for no Maximum/Minimum Minimum Hours: Maximum Hours:

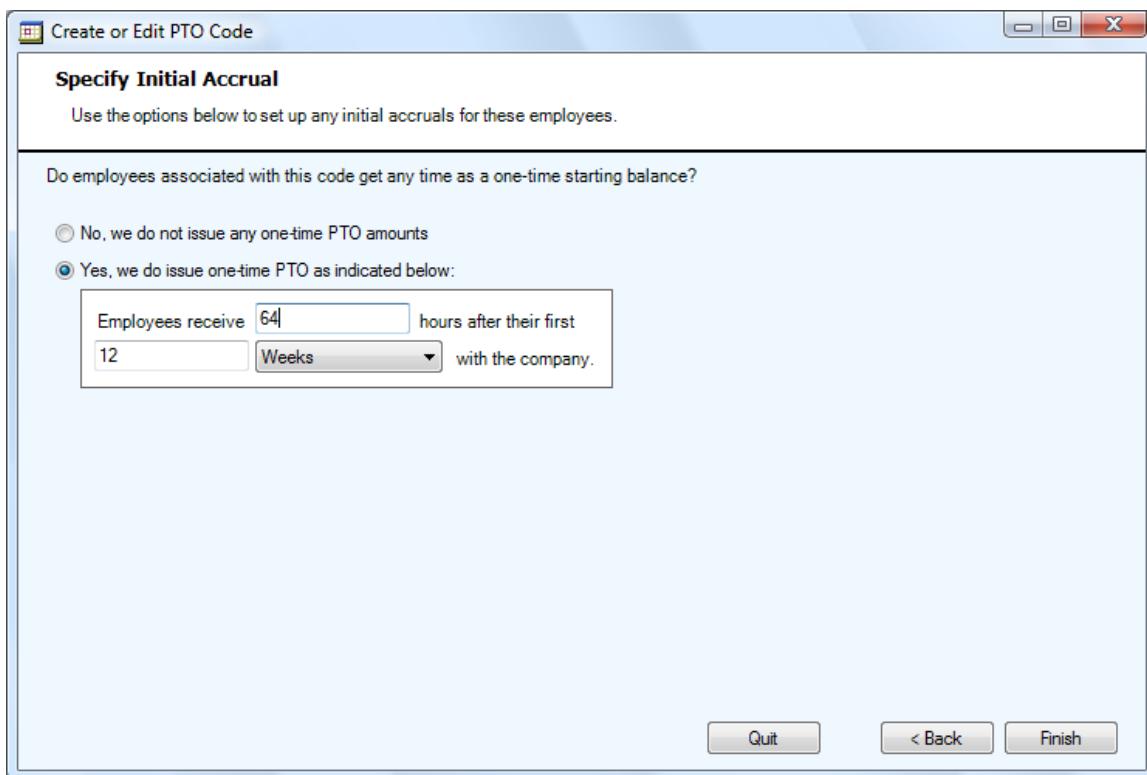
Step 7 – Additional Code Details

The ‘additional code details’ screen is used to allow the user to specify various pieces of information that will be apply to this code. Each piece of information is listed along with a sentence that describes exactly what they mean. If you have any difficulty completing any of the additional code details, please contact Greenshades Support.



Step 8 - Associating Employees/Employee Classes to a PTO Code

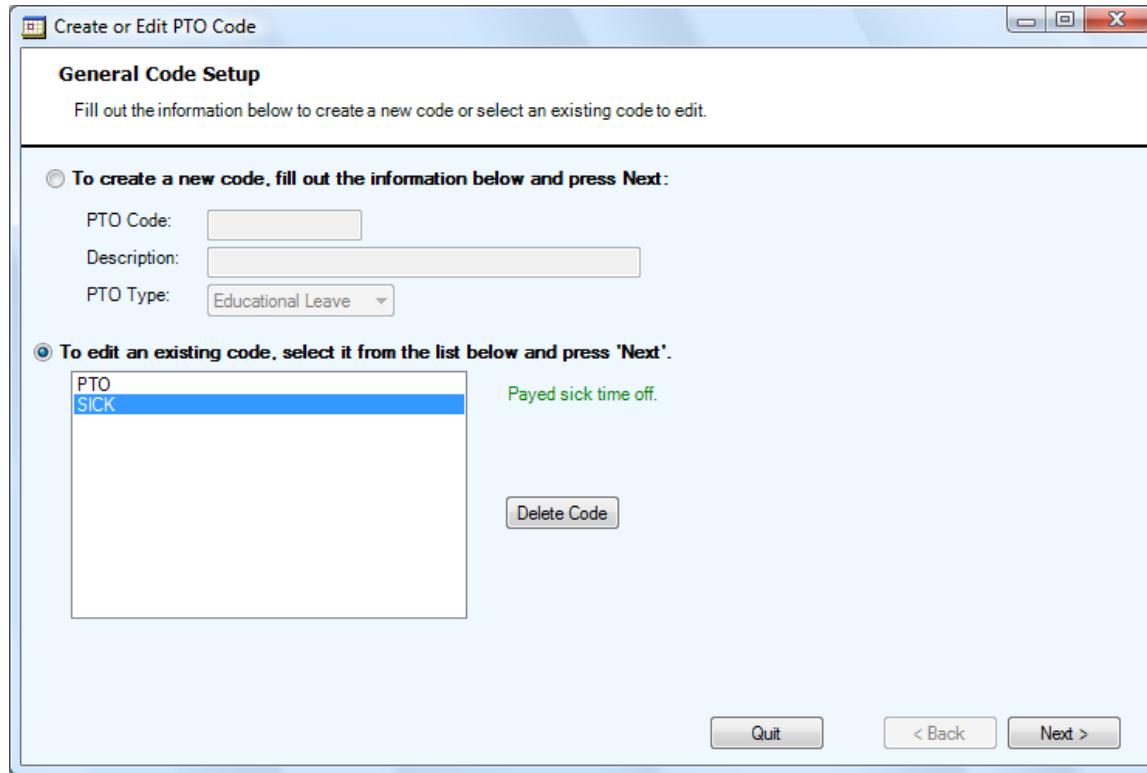
With your code completed, you must now choose which employees and employee classes are eligible to earn PTO according to your code. Remember, your rules will still be used to filter out employees, but you must specify all of the employees that should even be considered. Professional PTO gives users the ability to apply PTO Codes on both the Employee and Employee Class.



Step 9 - Specify Initial Accrual

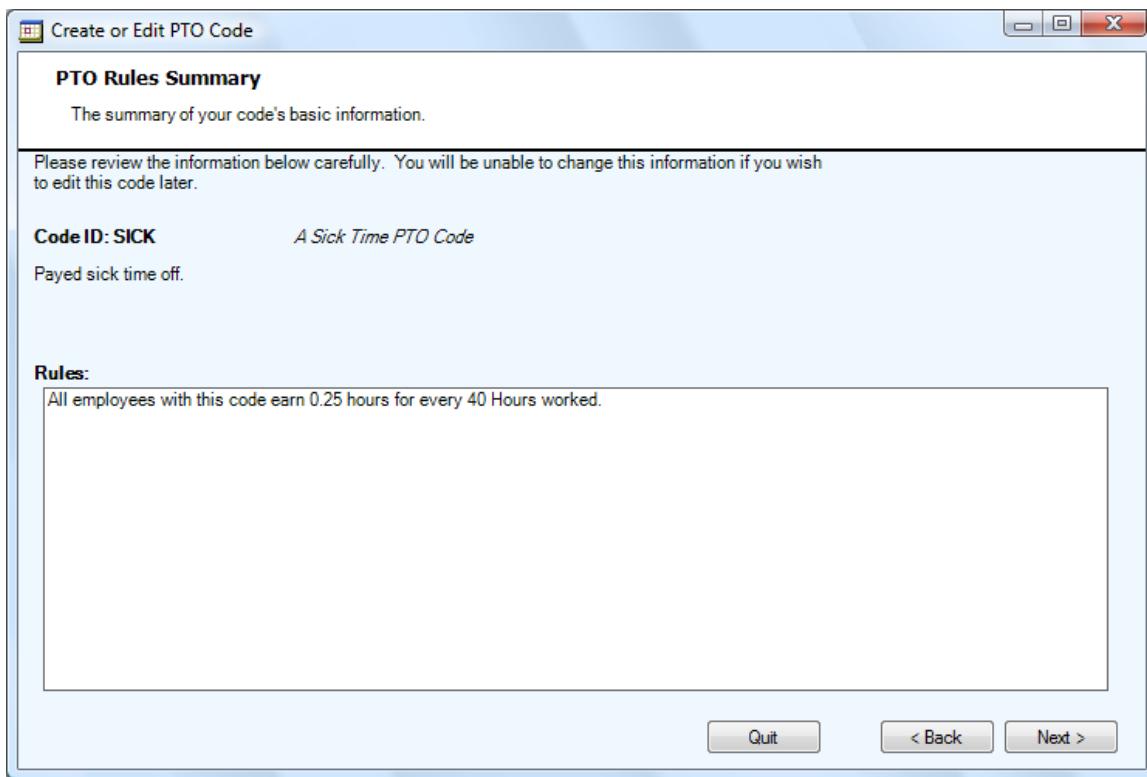
On this step you have the option of setting up an initial PTO starting balance. Simply type in the desired amount and click 'Finish' once completed.

Edit Existing PTO Codes



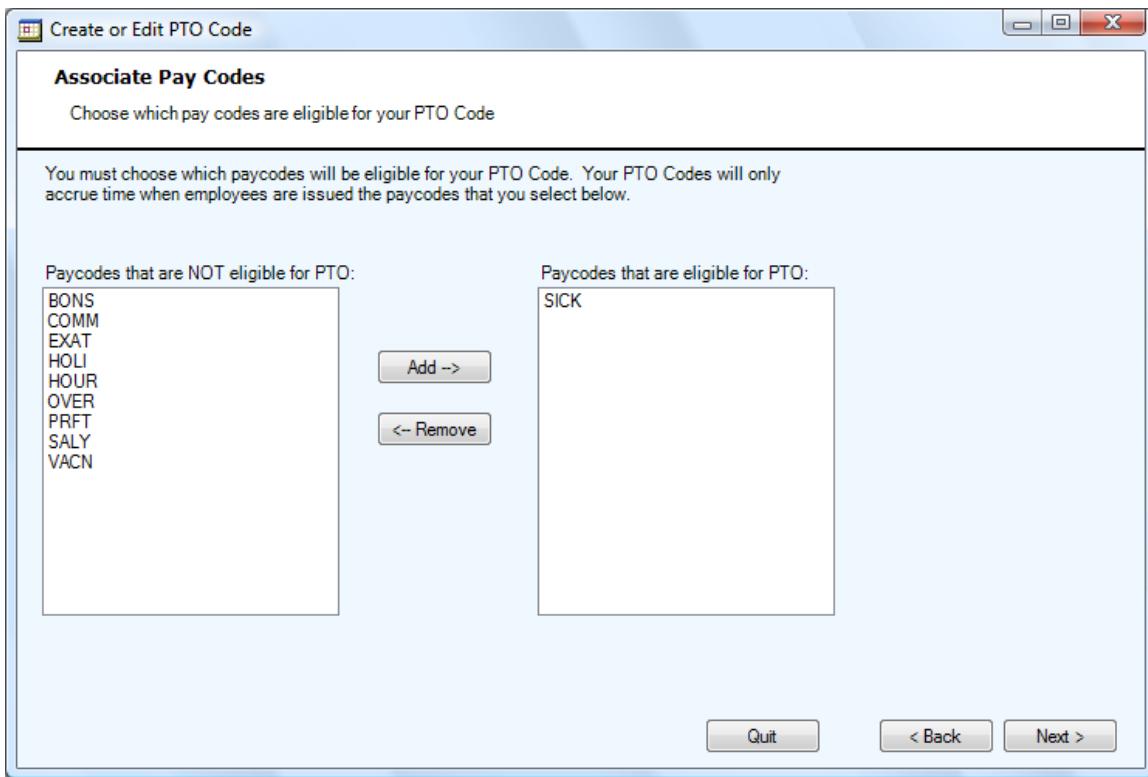
Step 1 – Select PTO code to Edit

You have the option of selecting any of the PTO codes you currently have setup within Professional PTO. Simply select the code you wish to edit, and click Next. You also have the option of deleting a PTO code on this screen, by highlighting the appropriate code and pressing the 'Delete Code' button.



Step 2 – Review current setup

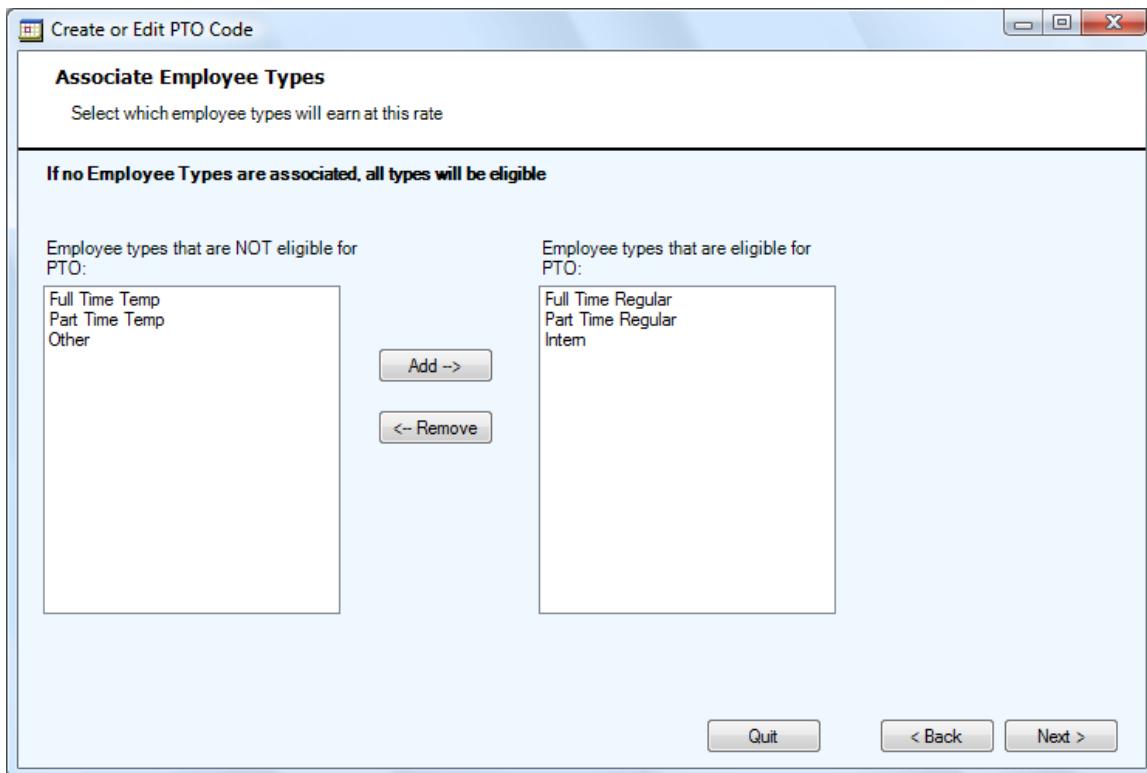
Before making any edits to the PTO code, please carefully review the current PTO code setup for the code you selected in step 1.



Step 3 – Associate Pay Codes

Once you have reviewed your current PTO code setup you will specify the Paycodes/Timecodes which will count towards your rules. To add Paycodes that are eligible to accrue this type of PTO, highlight the appropriate paycode and click Add. To remove eligible paycodes, highlight the appropriate paycode and click Remove.

Once you are satisfied with your selections, click ‘Next’



Step 4 – Associate Employee Types

Here you will be able to specify which employee types are eligible for the PTO code you are editing. To add employee types that are eligible to accrue this type of PTO, highlight the appropriate employee type and click Add. To remove eligible employee types, highlight the appropriate employee type and click Remove. You can choose any number of types you would like to have this code apply to.

Create or Edit PTO Code

Additional Code Details

Finally, specify some additional information about your PTO Code.

Start Date
This code starts applying 0.0 years after the employee's hire date

End Date
This code stops applying 99.0 years after the employee's hire date

Waiting Period
Employees don't earn PTO until 0 days after the code's start date.
Employees can't use PTO until 0 days after the code's start date. Rolling annual wait period

Hours Per Day
How many hours should an employee receive when they accrue a 'day' of PTO with this code? 8.00

Accrue Incrementally
If an employee is supposed to earn 1 day of PTO for every month worked, how much PTO should he have after half a month?

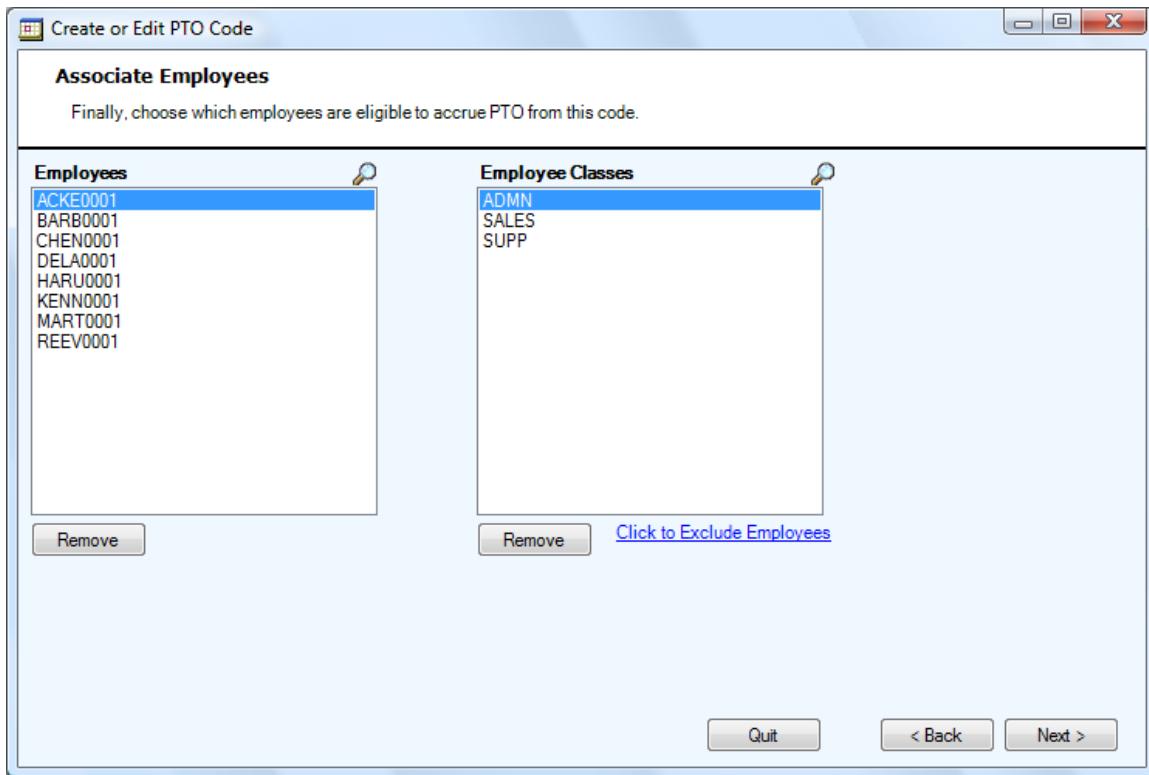
None-- PTO is available only after the time span I specified. (Default)
 Half a day-- PTO is available incrementally during time span.

For codes that accrue PTO per pay-period, is there a minimum threshold or a maximum number of hours for employee accrual?
Leave Blank for no Maximum/Minimum Minimum Hours: Maximum Hours:

Buttons: Quit, < Back, Next >

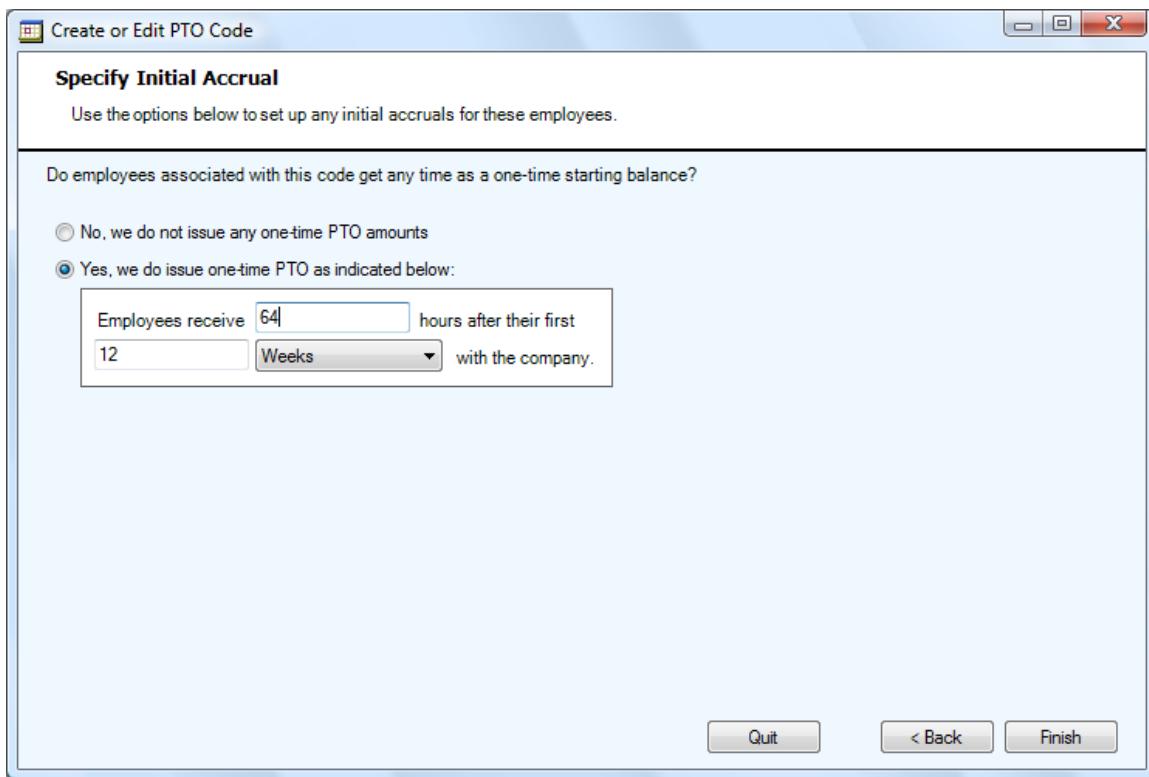
Step 5 – Additional Code Details

The ‘additional code details’ screen is used to allow the user to specify various pieces of information that will be apply to this code. Each piece of information is listed along with a sentence that describes exactly what they mean. If you have any difficulty completing any of the additional code details, please contact Greenshades Support.



Step 6 - Associating Employees/Employee Classes to a PTO Code

With your code completed, you must now choose which employees and employee classes are eligible to earn PTO according to your code. Remember, your rules will still be used to filter out employees, but you must specify all of the employees that should even be considered. Professional PTO gives users the ability to apply PTO Codes on both the Employee and Employee Class.

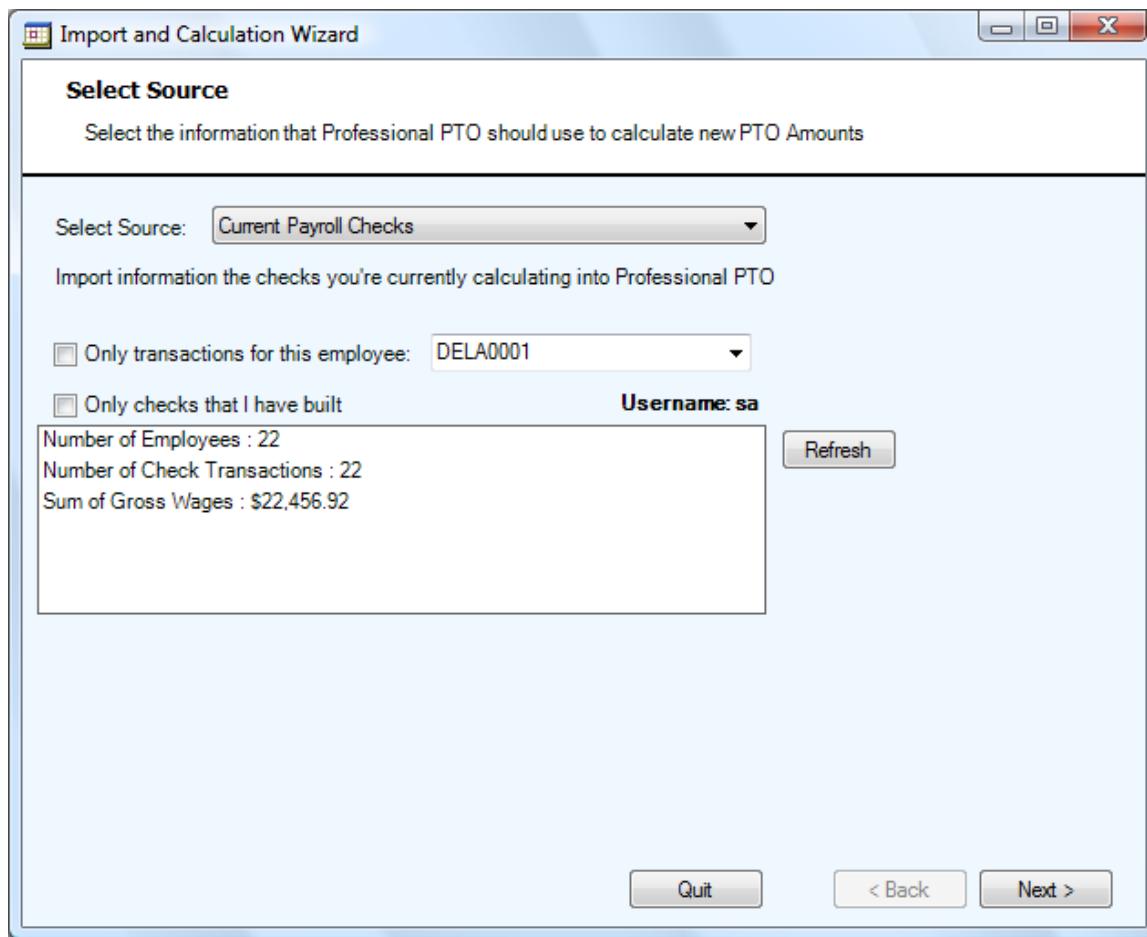


Step 7 - Specify Initial Accrual

On this step you have the option of setting up an initial PTO starting balance. Simply type in the desired amount and click 'Finish' once completed.

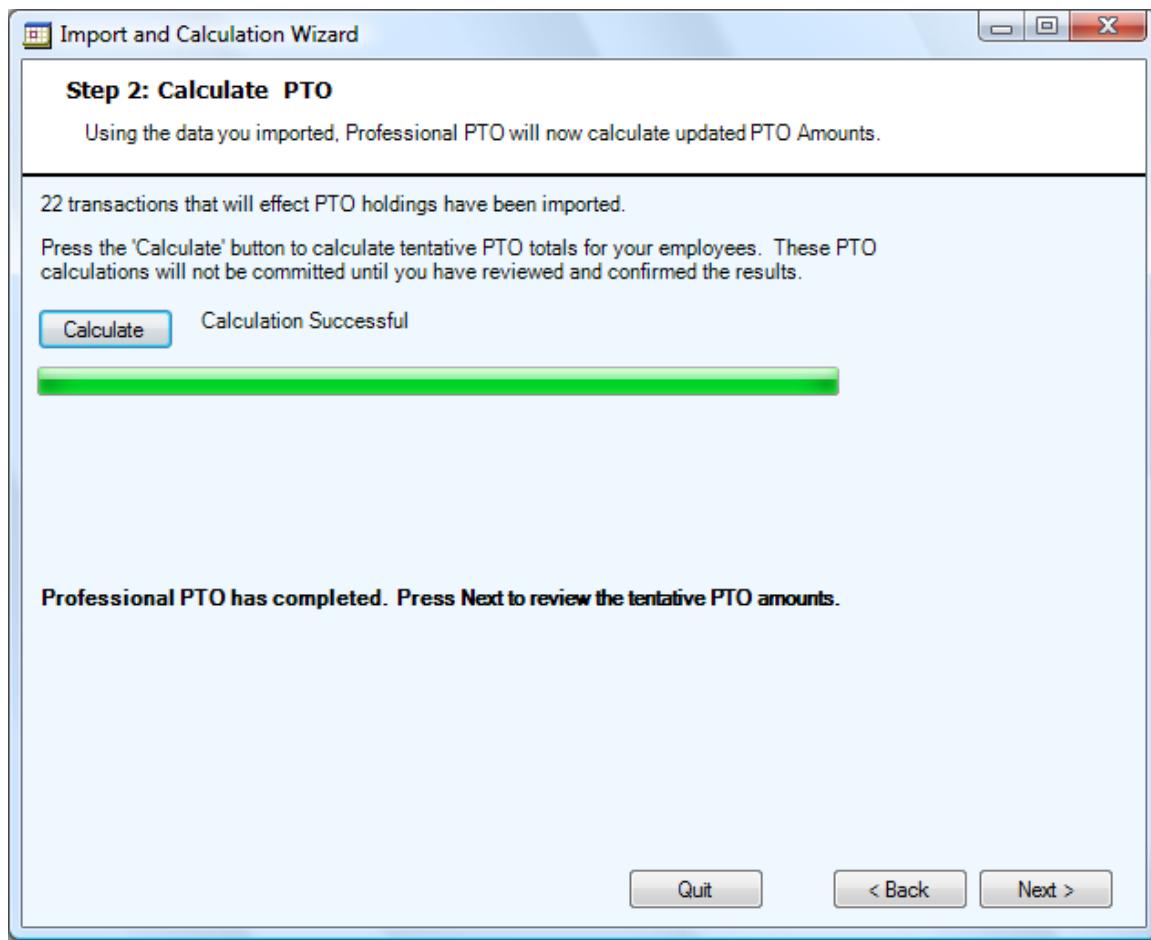
Calculating PTO

Professional PTO will automatically launch and prompt you to calculate PTO balances every time you calculate checks within Dynamics. You can also launch the calculation process by selecting the ‘Calculate PTO’ option from the main Professional PTO menu.



Step 1 – Select PTO Source

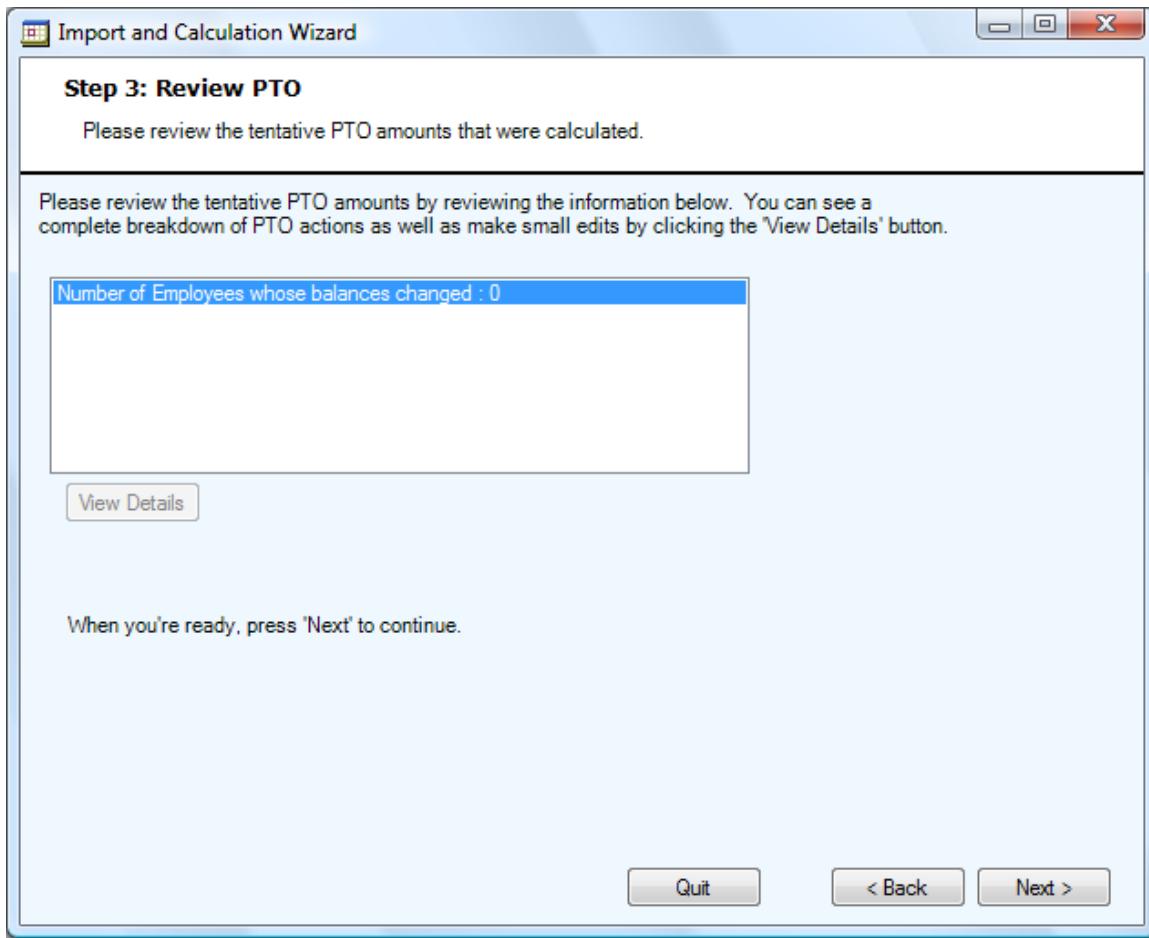
First you need to tell Professional PTO how to calculate the new PTO amounts. Most of the time, you will select the ‘Current Payroll Checks’ as the source, which will base PTO calculations on the checks most recently built.



Step 2 – Calculate PTO

To begin the calculation process, you need to click the ‘Calculate’ button. This process may take several minutes depending on the number of PTO transactions.

After the calculation progress bar fills up, you will either receive a success message or a PTO alert. For more information on PTO alerts, refer to the [Handling PTO Alerts](#) section of this guide.



Step 3 – Review PTO Calculations

This is the most important part of calculating PTO. The main screen provides you with a brief overview of the PTO amounts that were calculated. It is highly recommended that you use the 'View Details' button to check the PTO calculations for at least 3 employees before continuing. This will ensure that the PTO balances you will commit to your employee cards are correct.

Detailed PTO Holdings

View All Employees
 View Employees with Changed Balances
 More Columns?

| | EMPID | LastName | FirstName | PER | SICK | VAC |
|---|----------|----------|-----------|---------|---------|----------|
| ▶ | ACKE0001 | Ackerman | Pilar | 0.00000 | 0.00000 | 10.00000 |

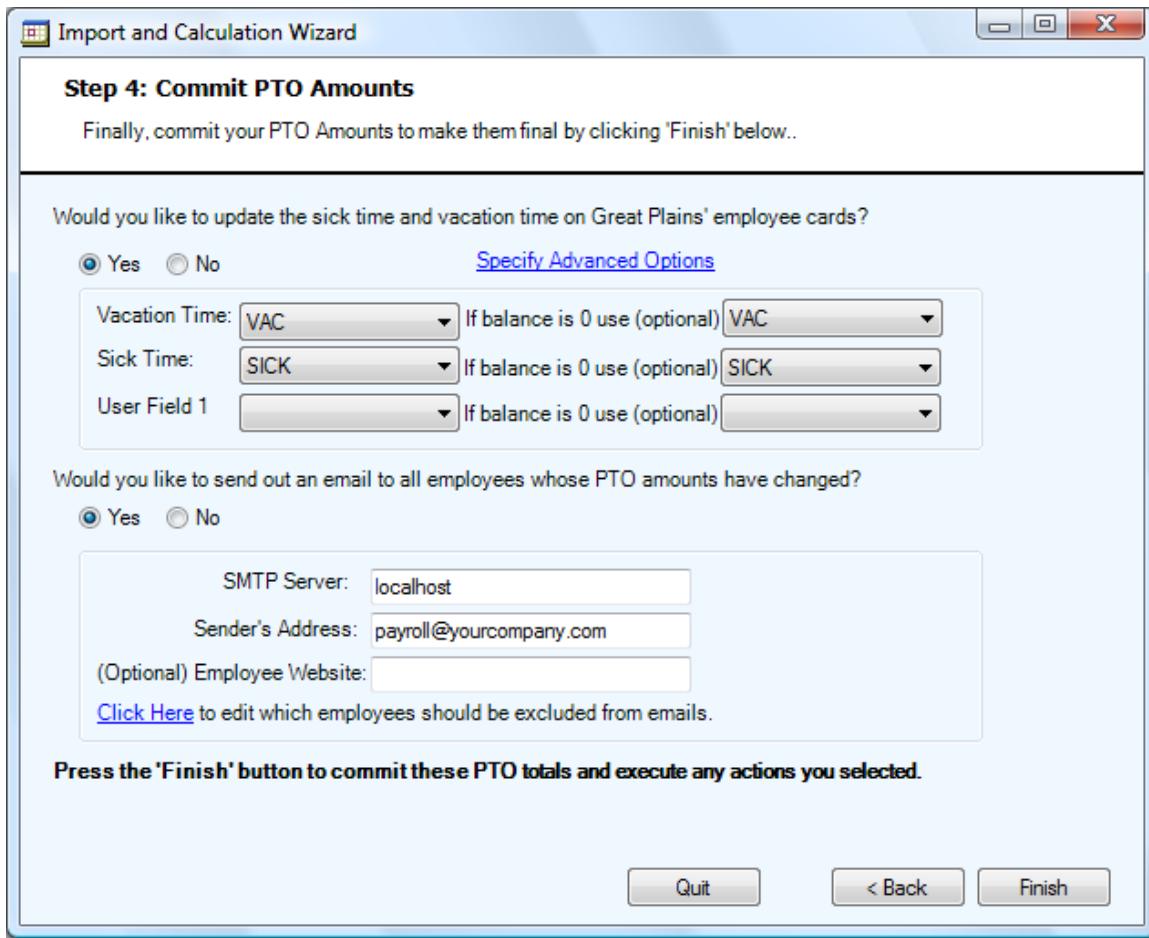
Transactions for Type:
 Include Internal Calculations

If you wish to edit an amount:

1. Select the type to update:
2. Enter a new amount:
3. Click 'Update Amount':

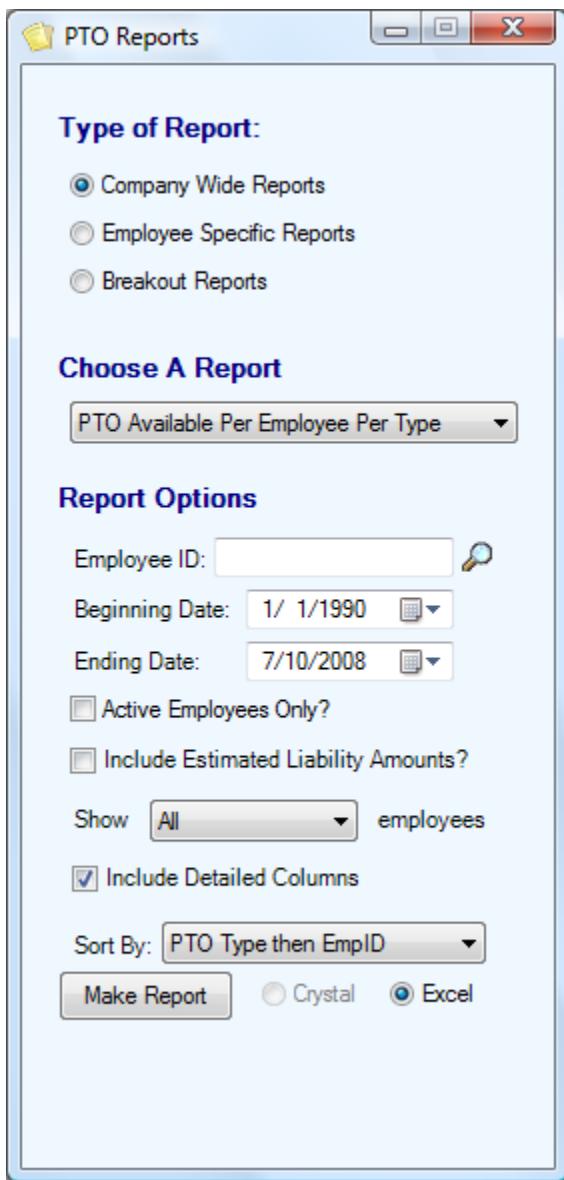
Clicking the ‘View Details’ option on the previous screen will display the Detailed PTO Holdings. If you have any questions about a specific employee’s PTO balance, click on the employee in question and you will see a brief summary of the PTO changes made for that employee. If you believe Professional PTO did not properly calculate PTO, do not continue past this step. Contact [Greenshades Support](#) for additional clarification.

After verifying the information on the Detailed PTO Holdings screen, click ‘Done’ to continue through the calculation process. Then click ‘Next’ to continue.



Step 4 – Commit PTO Amounts

To commit the new PTO balances click Finish. You will receive a Commit Successful message after your new PTO amounts are imported into Professional PTO.



Creating Reports

This section is intended to provide you with the needed information to create reports with Professional PTO. This section is not intended to be linear and is intended to provide detailed information regarding the screens within Professional PTO. Due to Professional PTO supporting both U.S. Payroll and H.R., all content unless otherwise stated will apply to both, however, your screens may have slightly different text.

Types of Reports

Professional PTO has the ability to make several different types of reports that provide amounts available at particular times. The reports have broken into three sections: company reports, employee specific reports, and breakout reports. Depending on the report, the report may contain visual graphs, the ability to export to excel, fiscal liability, and filtering by date ranges.

Company Reports

Company reports apply to your company as a whole, vs. a specific employee or group of employees.

PTO Available by Type

This report will show you graphs and tables of the amount of PTO that is available across all of your employees for all types of PTO.

PTO Taken by Type

This report will show you graphs and tables of the amount of PTO that is available across all of your employees for all types of PTO.

PTO Accrued over Maximum by Type

This report displays information about the number of hours that employees were unable to accrue because they had reached a maximum limit.

Employee Specific Reports

Employee Specific Reports are detailed reports about the PTO of any individual employee at your company. In order to view an employee-specific report, you must first use the lookup button to select one of your employees.

PTO Available/Taken by Type

This report is one of the most useful reports available to view an employee's PTO habits. The report will show all of the PTO that an employee has ever taken along with current availabilities.

PTO Accrual/Usage History

This report is a very detailed report about an employee PTO. This report will list, item by item, every instance of an accrual or usage. Here you can see an employee's accrual or usage habits across the entirety of the time that Professional PTO has been in place.

Breakout Reports

Breakout reports contain reports about specific groups of employees within your company. There are various different ways to group your employees, including grouping by employee class, by supervisor, position, and by department. By choosing how to group your employees, and finally which group to display, you can view detailed information about a very specific subset of your employee base.

Exporting To Microsoft Excel

This section is intended to provide information on exporting data from reports and data grids to Microsoft Excel.

Exporting Data

Most reports have the ability be exported to Microsoft Excel. To do so, first you must switch to “Tabular Display” from the drop down list that appears on the report screen. If no such item exists, you will be unable to export this report to excel. Switching to a tabular display will render a table onscreen and provide you with a link to “Export to Excel”. Once you have clicked the export to Excel link you will receive a Save File dialog in which will prompt you to either open or save the file. It is recommended that you save the file to your local disk rather than immediately open it. If you immediately open the file, the Professional PTO window may not launch Excel, and instead may display the data within the window. In order to return to the previous screen, you will need to restart the Professional PTO administration window.

Handling PTO Alerts

This section is intended to provide you with information on alerts, and also provide the proper steps on how to handle any Professional PTO alerts that may be available.

PTO Alerts Defined

Professional PTO has implemented a system that allows the end user to see any problems that are encountered by the Professional PTO system. These “alerts” range from Professional PTO having a critical error, to having a rule that is not comprehensive enough (an employee worked 42 hours on regular time, but your rule only allowed for 20-40 hours), to an employee having a negative balance of PTO.

How to handle Alerts

If there are any alerts present for your Professional PTO system, a red message will appear in the upper left hand corner of the Professional PTO screens. The link will appear only if there are alerts. To view the alerts, simply click on the red text to be taken to the alerts screen.

Alerts are sorted by importance and provide detailed explanations of what occurred. Please contact support if you have any questions about your alerts, especially if they are critical. Most alerts are typically resolved by reading the error messages and taking the appropriate steps (for instance, if an employee took PTO that was not available you may write a warning to the employee or manually edit their amount). Once you have finished dealing with an alert, you may delete it so that it no longer appears on the alerts screen. Once all alerts are deleted, the red message will no longer appear at the top of your screens.

Frequently Asked Questions

Here we have provided some of our most commonly asked questions. Many of these are problems that people have encountered while running Professional PTO and possible workarounds to those problems.

How can I get live support?

Live support comes with Greenshades Software. You can access Greenshades Support online at: <http://www.Greenshades.com/MyGreenshades>. You can also send an email directly to support at: support@greenshades.com. Finally, you can also call support at 888-255-3815 extension 700.

How can I be notified of Professional PTO updates?

Greenshades Support sends out notification via email of all Professional PTO updates about a week in advance of the actual release. If you would like to be added to the update emails please contact Greenshades Support.

How can I find out what my registration key is?

Your registration key is available on your personalized MyGreenshades webportal at <http://www.greenshades.com/mygreenshades>. At MyGreenshades, you can retrieve registration keys, view invoices, and much more. Once you are issued a registration key it should never change, regardless of enhancement payments or upgrades to your accounting package.

Client feedback:

Was this guide helpful to you? We would love to hear your feedback. Was there something else that you feel should have been included? We will do our best to accommodate you! Did this guide make your task easier? Make our day and let us know! Please send all feedback to support@greenshades.com.