

PROFESSIONAL PTO END USER DOCUMENTATION



A DIVISION OF GREENSHADES SOFTWARE

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Product Overview

Microsoft Great Plains provides very limited support for the accrual and tracking of employee PTO. The goal of Professional PTO is to enhance this functionality utilizing a “rules-based” system that gives Payroll and H.R. operators an easier, more accurate way to set up their company’s PTO rules inside Microsoft Great Plains. In addition to controlling employee PTO accrual, 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 will 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 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.

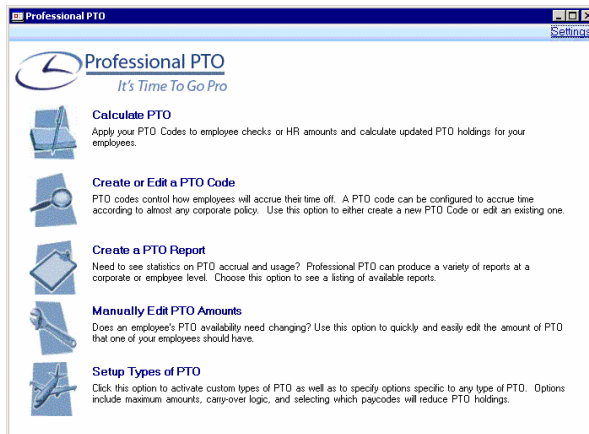
Professional PTO is seamlessly integrated with Microsoft Great Plains and has been developed utilizing the powerful Microsoft .NET Framework. Having individual integrations into the U.S. Payroll and H.R. modules, Professional PTO calculates PTO at strategic points within your typical process to utilize these functions. For more information on this, please visit the section entitled [How Professional PTO Works](#).

One might solve their frustrations with Employee time-off by utilizing Professional PTO features that include:

- Support for complex accrual rules that calculate time off based on your company rules and units
- Support for additional PTO Types (Personal Time, Educational, FMLA, and even your own custom types)
- Support for maximum amounts (specify this amount per PTO type, per Employee class)
- Support for carry-over (carry-over a % or gross amount on hire/adjusted hire date or even calendar)
- Support for waiting periods (powerful waiting periods that can wait to accrue time to a specific time)

- Reports Suite (Breakouts for Employees, Employee classes, Departments, Positions, and more)
- Ability to update Great Plains data with your custom PTO data
- Ability to automatically email employees with newest accrual changes.
- Employee Web Portal (intranet add-in that allows employees to access their available and used time)
- Export Data to Microsoft Excel (export reports directly to Microsoft Excel for additional analyzation/review)
- And more...

Navigating Professional PTO



Professional PTO is intended to be a simple product to navigate with clear and concise descriptions. When first launching Professional PTO from Microsoft Great Plains, you'll access the Professional PTO Administration window from **Routines>>Professional PTO**. Doing so will provide the following navigation options.

Main Menu

The main menu is shown when initially launching the Administration window.

- **Calculate PTO** is used to manually launch the PTO calculation process. If you have the Payroll integration, this will automatically run when you calculate checks.
- **Create or Edit a PTO Code** is used to either create a new PTO Code or edit an existing one.
- **Create a PTO Report** will show a listing of available reports that incorporate accrual and usage statistics.
- **Manually Edit PTO Amounts** is used to quickly and easily edit the amount of PTO that one or more of your employees should have.
- **Set up Types of PTO** will define options for the native types of PTO within professional PTO as well as activate custom types of PTO

Settings

Settings will present you with options such as Registration Information, Automatic Updates, and Uploading data for Support as needed. For more information on the Settings page, please see the Professional PTO Settings section of this manual.

Lookups

Many screens may provide 'Lookup' functionality, in which will aide you with entering data. These screens can assist with looking up Employee IDs, Employee Classes, etc. These lookups operate like typical Great Plains lookup screens and have 2 parts:

ID	DSCRIPTN	display
ACCT	Accounting	ACCT-Accountin
ADMN	Admin	ADMN-Admin
INST	Installation	INST-Installation
SALES	Sales	SALES-Sales
SUPP	Support	SUPP-Support
TEMP	Temporary Work	TEMP-Temporar

- **Filter**

- The filter will assist you by searching for specific data matching the data you have entered

- **Name/Detail**

- The name detail will show the ID of the particular object that is being searched for, along with the name/description of that object

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.

While Professional PTO is backed by full installation and configuration support, it is highly recommended that you read this section in its entirety in order to ease the process.

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 a PTO Code

To begin creating a PTO Code, simply access Professional PTO from **Routines>>Professional PTO** and click **Create or Edit a PTO Code**.

General Code Setup will have you 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')

Code Type

Create or Edit PTO Code

Step 1: General Code Setup
Fill out the information below to create a new code or select an existing code to edit.

To create a new PTO Code, you must select what type of code you wish to make. The type of code you choose will determine the types of rules you will be able to associate with this code. Scroll through the list below and watch the 'Rule Examples' until you find the rule that best fits your policy:

Code Type:

Example Rules:

- All employees with this code earn .020 hours of PTO for every hour that they work.
- All employees with this code earn 2 weeks of PTO for every year that they work.

Buttons: Quit, < Back, Next >

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.

Rule Sentence/Rate Amounts

Create or Edit PTO Code

Set Up Groups
Now you must specify how you wish your employees to be grouped for this code.

You have chosen a years-of-experience code. Accordingly, employees who are assigned this code will be split into different groups based on how many years they have worked with your company. Please fill out the sentences below according to your corporate policy.

Rule Sentences:

- I want one group of employees that have been with the company for over but no more than year:
- I want one group of employees that have been with the company for over but no more than year:
- I want one group of employees that have been with the company for over but no more than year:
- I want one group of employees that have been with the company for over but no more than year:
- I want one group of employees that have been with the company for over but no more than year:

Buttons: Quit, < Back, Next >

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.

PTO Rules Summary

Create or Edit PTO Code

PTO Rules Summary
The summary of your code's basic information.

Please review the information below carefully. You will be unable to change this information if you wish to edit this code later.

Code ID: VAC1 A PTO PTO Code
Vacation Time

Rules:

- All employees who have been with the company more than 0 but no more than 1 years earn 1 Hours for every 2 Days worked.
- All employees who have been with the company more than 1 but no more than 3 years earn 2 Hours for every 2 Days worked.
- All employees who have been with the company more than 3 but no more than 5 years earn 3 Hours for every 2 Days worked.

Buttons: Quit, < Back, Next >

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.

Associate Paycodes/Timecodes

Create or Edit PTO Code

Associate Pay Codes
Choose which pay codes are eligible for your PTO Code

You must choose which paycodes will be eligible for your PTO Code. Your PTO Codes will only accrue time when employees are issued the paycodes that you select below.

Paycodes that are NOT eligible for PTO:
BONS
COMM
EXAT
HOLI
HOUR
OVER
PRFT
SALY
SICK

Paycodes that are eligible for PTO:

Buttons: Add -->, <-- Remove

Buttons: Quit, < Back, Next >

Once you have completed your Rule Sentences you will specify the Paycodes/Timecodes which will count towards your rules. For instance, if you let your employees accrue .02 hours of sick time for every week worked you must then tell Professional PTO that the employee must have a week of 'Salary' or 'Sick Time' in order to actually accrue PTO.

Associate Employee Types

Create or Edit PTO Code

Associate Employee Types
Select which employee types will earn at this rate

If no Employee Types are associated, all types will be eligible

Employee types that are NOT eligible for PTO:
Full Time Regular
Full Time Temp
Part Time Regular
Part Time Temp
Intern

Employee types that are eligible for PTO:

Buttons: Add -->, <-- Remove

Buttons: Quit, < Back, Next >

Here you will be able to specify which employee types are eligible for the PTO code you have created. You can choose any number of types you would like to have this code apply to.

Additional Code Details

Create or Edit PTO Code

Additional Code Details
Finally, specify some additional information about your PTO Code.

Start Date
This code starts applying 0 years after the employee's hire date

End Date
This code stops applying 99 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.

Hours Per Day
How many hours should an employee receive when they accrue a 'day' of PTO with this code? 8

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 1 specified. (Default)
 Half a day- PTO is available incrementally during time span.

Buttons: Quit, < Back, Next >

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 call Greenshades for support.

Associating Employees/Employee Classes to a PTO Code

The screenshot shows a software window titled "Create or Edit PTO Code" with a sub-header "Associate Employees". Below the sub-header is the instruction: "Finally, choose which employees are eligible to accrue PTO from this code." The window is divided into two main sections: "Employees" and "Employee Classes".

Employees

ACX0001
BARB0001
BARR0001
BUCH0001
FLOO0001

Employee Classes

INS
SALES
SLIPP
TEMP

At the bottom of each list is a "Remove" button. Below the "Employee Classes" list is a blue link: "Click to Exclude Employees". At the very bottom of the window are three buttons: "Quit", "< Back", and "Finish".

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 level.

PTO Types

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. From the Main Menu of Professional PTO, you can view or edit any PTO type through the 'Set up Types of PTO' menu. While they might seem simple, there are quite a few pieces of information that are specific to a type of PTO, including maximum amounts of PTO, carry-over rules, the paycodes or timecodes that will reduce the amount of available PTO, and more.

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.

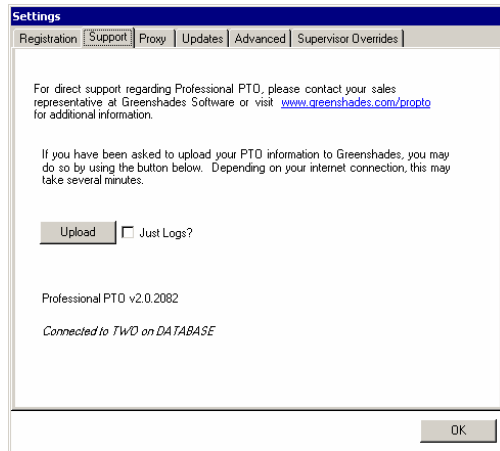
PTO Reducing Paycodes/Timecodes

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.

Professional PTO Settings



Professional PTO's settings screen contains configuration information about the Professional PTO System as a whole.

Registration

The Registration tab is where you can view and re-enter your Professional PTO Registration key. You will not normally need to access this information.

Support

The Support tab is available for when problems arise and Greenshades' Technical Support will need to access your data. Clicking the Upload button will submit your data to Greenshades' secure server to review. You should only do this if requested by the Support staff to do so.

Proxy

Professional PTO requires an internet connection to function properly. This connection allows us to validate your copy of Professional PTO, keep your software up to date with automatic updates and allows Support to access your data in the event of a problem. Some network setups include a proxy server between workstations and the internet. Simply fill in the required information in the Proxy tab to allow Professional PTO access through your proxy server.

Updates

The Updates tab allows you to control the deployment of Professional PTO updates. You have the option of enabling or disabling the Automatic Update feature as well as forcing a manual check for updates. If you have Automatic Updates disabled (defaulted to enabled) you can check for updates by clicking the 'Check for Updates' button.

Advanced

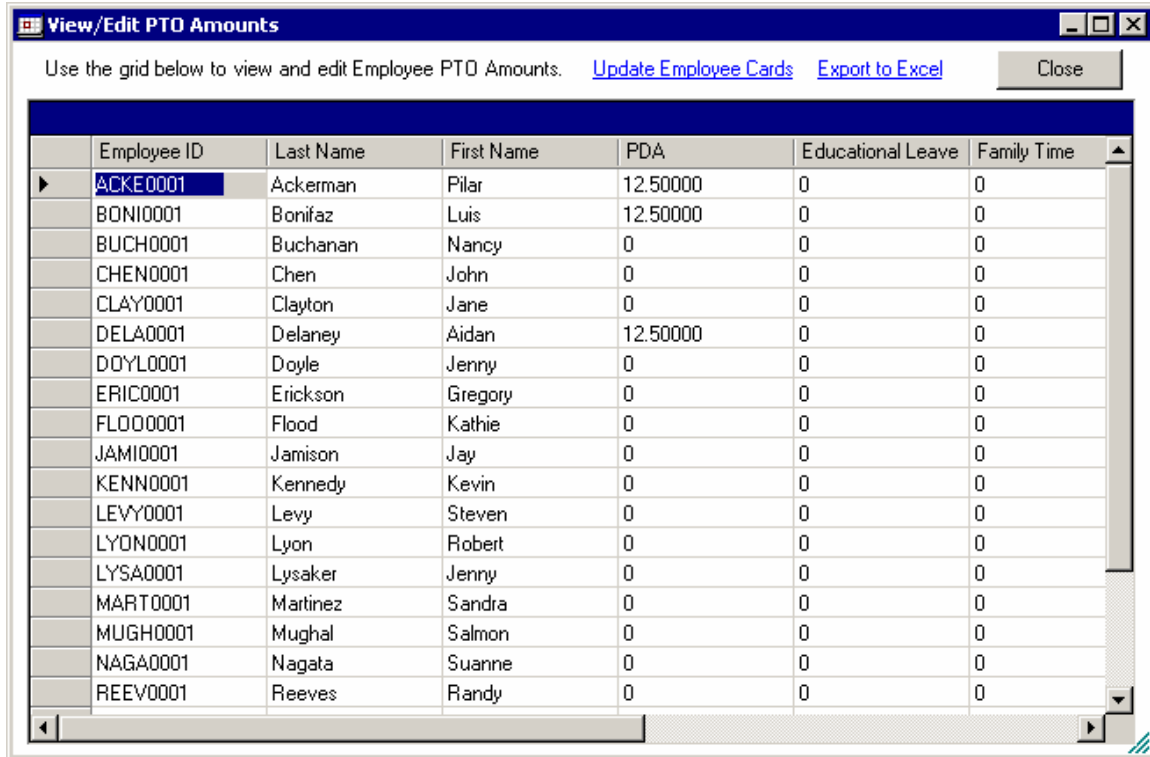
The advanced tab has two separate options available. The first refers to clients who utilize a Terminal Services environment (like Citrix) and are experiencing specific problems. The other is an advanced data importer. Neither of these options should be used unless you are prompted to do so by Greenshades Support.

Supervisor Overrides

This option is available to our users so that they may be able to manually specify which supervisor an employee has time-off approved by or if they do not need approval at all. Simply fill in the required information and click the 'Save' button.

Manually Editing PTO

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 window titled "View/Edit PTO Amounts" with a toolbar containing "Update Employee Cards", "Export to Excel", and "Close". Below the toolbar is a table with the following data:

Employee ID	Last Name	First Name	PDA	Educational Leave	Family Time
ACKE0001	Ackerman	Pilar	12.50000	0	0
BONI0001	Bonifaz	Luis	12.50000	0	0
BUCH0001	Buchanan	Nancy	0	0	0
CHEN0001	Chen	John	0	0	0
CLAY0001	Clayton	Jane	0	0	0
DELA0001	Delaney	Aidan	12.50000	0	0
DOYL0001	Doyle	Jenny	0	0	0
ERIC0001	Erickson	Gregory	0	0	0
FLOO0001	Flood	Kathie	0	0	0
JAMI0001	Jamison	Jay	0	0	0
KENN0001	Kennedy	Kevin	0	0	0
LEVY0001	Levy	Steven	0	0	0
LYON0001	Lyon	Robert	0	0	0
LYSA0001	Lysaker	Jenny	0	0	0
MART0001	Martinez	Sandra	0	0	0
MUGH0001	Mughal	Salmon	0	0	0
NAGA0001	Nagata	Suanne	0	0	0
REEV0001	Reeves	Randy	0	0	0

To begin editing PTO, simply access Professional PTO and click *Manually Edit PTO Amounts* from the main menu. Once displayed, clicking any PTO column on any line will allow you to change values on that line. Click 'Close' when finished to save your edits. If you wish for these changes to affect your employee cards immediately, click the Update Employee Cards link. If you wish to have an excel breakdown of employee PTO, click the 'Export to Excel' link.

Creating Reports

The screenshot shows a software window titled "PTO Reports". It is divided into three main sections:

- Type of Report:** Contains three radio button options: "Company Wide Reports" (which is selected), "Employee Specific Reports", and "Breakout Reports".
- Choose A Report:** Contains a dropdown menu currently displaying "PTO Available: Summed By Type".
- Report Options:** Includes an "Ending Date:" field with a date of "9/28/2005", two checkboxes labeled "Active Employees Only?" and "Include Estimated Liability Amounts?" (both are unchecked), and a "Make Report" button.

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.

Type of Report

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.

- The *PTO Available by Type* 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.
- The *PTO Taken by Type* 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.
- The *PTO Accrued over Maximum by Type* 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.

- The *PTO Available/Taken by Type* 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.
- The *PTO Accrual/Usage History* 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.

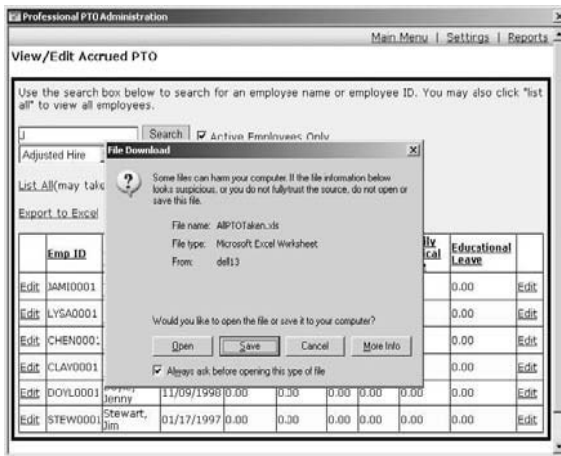
Breakout Reports

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 to 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.

About Using Professional PTO with Great Plains Payroll

This section is meant to provide a small technical workflow of Professional PTO's interaction with the payroll process. It is provided as an extra help feature only and is not required for correct configuration and operation of Professional PTO.

Professional PTO's engine is initially invoked when the Payroll operator calculates checks. At this time, Professional PTO will gather information from the Payroll Check Work table (UPR10203), combine them with the rules that have been set up within the Professional PTO application and stored within Professional PTO's own tables, and create temporary calculations for your employees. This engine is run on the Great Plains database server and typically introduces no performance decrease to the client. Once you have successfully printed your checks and start the Posting process, Professional PTO will commit the new PTO to its available balances. It is at this time that Professional PTO will update employee cards and send employee emails if those options have been enabled. Once the post process has been completed Professional PTO will update its screens and reports with the newest PTO values.

Contacting Support

To obtain Professional PTO support, please contact your sales representative within normal operating hours (9-5 Eastern). Extended support may be requested 72 hours in advance to take care of issues such as data migration, setup, etc.

Contact Information:

Greenshades Software: 904.807.0160

Fax: 904.807.0165

Email: ProPTO@greenshades.com

Mailing Address:

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Suite 220

Jacksonville FL, 32256