

# ActiveCollab HR Manager Module Manual

## Description

Activecollab HR Manager module let's you track the salary(payouts, withdrawals, rates, bonuses) of your team if they are working on hourly or fixed monthly rate, types of days(absence, vacations, etc) and assign to them for calculations - weekends, bonuses, permissions to get overview at one page.

## How it works!

When installed you'll get tabs at people section:

- Overview: shows you standard people section as you have it at AC by default;
- HR Manager: shows you overview page with calendar and statistics of the working days, weekends or holidays that can be set up at "Events" section. In the calendar you also see when each member of the team missed the days, or had specific event on period of time with the description of that event. At the bottom the statistics shows how many days off you had and how many working days in the current month. You can go to the previous or next month using bar above the calendar. At the bottom right you can see Event types that are relevant to current month if any member of the team is on calendar and have this event. It's shown also with formulas of the event and event type. If you have the permissions, you can select specific user above the calendar to see his overview. By default you see owner company overview;
- Salary: first screen gives you salary overview of the whole team in your company along with bonuses, payouts and rates. To view details of the specific user, click on the user avatar link or click on edit icon next to the user. You can also edit user's payout, rate or add/close bonus if you have such permissions that can be set up at "Permissions" tab. You can also click on Visibility button to see what users can be seen by administrator, as administrators (company owners) won't have salary here, so they shouldn't be visible at this tab;
- Events: you can set up any event type that you have in methodology of your company and assign how it would be calculated depending on rates with specific color so it would be more visible. These calculations affect salary and payouts;
- Calendar: you can just click on any day in the calendar to set up days off and working days. The number of working days and days off can be seen at the bottom of the screen at "HR Manager" tab; You'll also see users birthdays if you set any at users profile->Options button ->Set Birthday;
- Permissions: if you are the one who pays your team(administrator), you will see all the tabs. But you also can assign your HR Manager specific rights, so that user role or specific user will have only access to the allowed features. Members of your company should have "can access" permission to see only their relevant information. Your clients shouldn't have access to this module, so you switch off that feature to them by selecting "can\_use\_hr\_manager" set to "no" at Admin->Roles->System roles or selecting "no access"at HR Manager->Permissions tab. Your HR manager should have "can manage" rights to see most of the information that admin sees.
- Set Birthdays and employment date at users profile->Options button and see birthdays at People->Calendar Tab

"Can Manage" not administrator users permission:

- Set up Events for users at HR Manager module;
- See only this user's salary;
- Manage Event types at Event tab;
- Manage day's off at Calendar tab;

## Calculations on fixed monthly rate:

The final payout is calculated depending on several factors:

- Events - if user missed one day in current month, his payout will be calculated based on formula that is assigned to this event(details can be found at the example);
- Days off and working days - final payout calculation will also depend on that factor if user missed several days or worked extra during specific days on another rate that can also be set up at event types. The final formula will be affected by the factor how many days off and working days were in month;
- Rate- this factor is main and depending on rate what final result we'll have.

*Note: bonuses are not included in payouts and are calculated and closed separately.*

Formula example: we have Alex who's monthly rate is \$1200 and he missed 2 working days in previous month and absence formula is  $0/1 * \text{rate}(\text{day rate})$ , so that these days won't be included in total payout. Alex also worked on Sunday that is weekend and we have set up formula in "Events" tab as Overtime-  $2/1 * \text{rate}$ . From "Days off" tab we specified that in current month we have 9 weekends and 1 day of because of national holiday, there are 10 days off out of 31 days in month and 21 working days.

The result payout formula will be following:  $2/21 * 0/2 * 1200 + 1/21 * 2/1 * 1200 + 18/21 * 1200 = 1143$ .

Alex payout in the current month will be \$1143

If we pay Alex several times a month we have "Withdrawn" field at "Salary" tab that should be equal to payout field to close month for each member of your company or you can just add amounts to withdrawn to know how much you owe to the specific member.