

Labor Reporting & Tracking

Employee File

Labor tracking and reporting is optional in the SMMS system, leaving you in control of whether, and to what degree, you choose to implement. This is particularly useful for a scaled implementation, or in companies where labor tracking may present other issues.

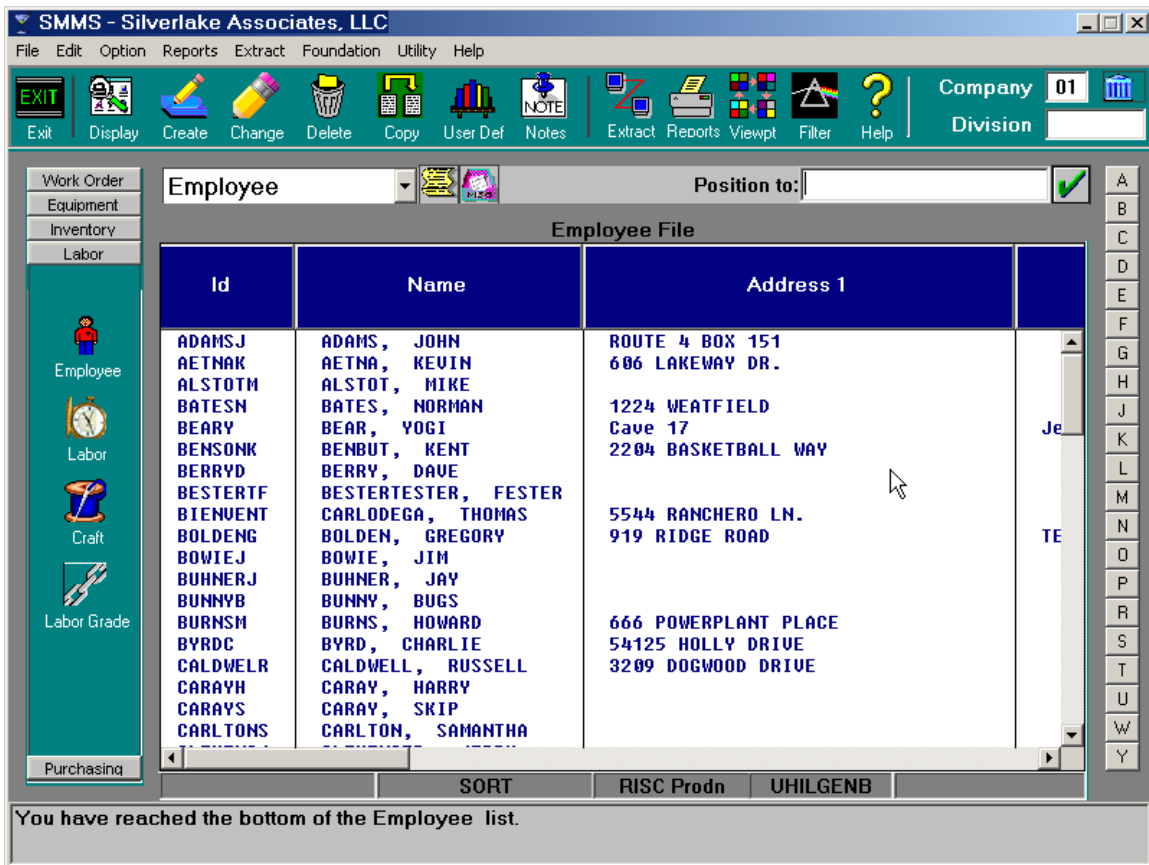


FIGURE 1

If you choose to implement labor reporting, you start with the Employee file. The Employee file may include permanent employees, contractors & sub-contractors, as well as “employee teams” and workgroups. The members of the employee file provide the foundation for labor reporting and tracking.

When you implement labor tracking and reporting, you enter the employees, service teams, supervisors and other sources of labor into the Employee file. Once you establish the Employee file, you may “assign” employees to work orders and PM schedules to help you estimate and balance your labor workload.

Even if you choose not to pre-assign labor to orders and schedules, you can still use the Employee file in your labor reporting on work orders.

Employee Screen

The Employee screen contains basic information about the employee.

The screenshot shows the 'Employee Maintenance' window. The title bar reads 'Employee Maintenance' and the menu bar includes 'File', 'Edit', 'Report', 'Download', 'Utility', 'Notebook', and 'Help'. The toolbar contains icons for 'Ok', 'Cancel', 'Exit', 'Create', 'Delete', 'Copy', 'Next', 'Extract', 'Reports', 'Messages', 'Output', and 'Help'. On the right, there are fields for 'Company' (01) and 'Division'. Below the toolbar are tabs for 'Employee', 'User Defined', 'Notes', and 'Labor'. The main area displays the following information:

Employee Id: BIENVENT

First & Last Name:	THOMAS	CARLODEGA
Address:	5544 RANCHERO LN.	
City / State / Zip:	SANTA FE	NM 80236

Rates	
Regular:	16.50
Overtime:	27.00
Double Time:	35.00

Home Phone: 8547124551 **Mobile:** 847553225 **Pager:** 8458875487
Email Address: tcarlodega@hotmail.com

Labor Grade: 9 WHSE4
Seniority Date: 6/17/02 **Hire Date:** 8/08/00 **Birth Date:** 4/17/63
Social Security #: 602554842 **Status:** Active

FIGURE 2

When you track labor in SMMS, you choose whether to track labor hours and dollars, or only hours. If you choose to track labor dollars, you decide how to apply rates by selecting one of the following methods:

- Using a standard rate for the Company or Division. This method applies a single rate to all labor hours.
- Using a rate based on the employee's "labor grade". This intermediate costing method allows you to group employees into "labor grades" according to skill, seniority, department, etc. When this method is used, each employee must belong to a "labor grade".
- Using the individual employee's rates, defined on the Employee screen (shown above).

Employee rates are sensitive information, and you can tell SMMS whether to display rate information as part of your security strategy. This security is defined at the user level, so managers and supervisors can be allow to “see” rates and costs while this information may be restricted from others.

Labor Grades

When labor grades are used for labor costing, the labor grades are defined on the labor grade screen (Figure 3).

The screenshot displays the 'Labor Grade' window. At the top, there is a menu bar with 'File', 'Edit', 'Report', 'Download', 'Utility', and 'Help'. Below the menu is a toolbar with icons for 'Ok', 'Cancel', 'Exit', 'Create', 'Delete', 'Copy', 'Next', 'Extract', 'Reports', 'Messages', 'Output', and 'Help'. On the right side of the toolbar, there are fields for 'Company' (01) and 'Division' (blank). The main area of the window is titled 'Labor Grade' and contains the following fields:

- Labor Grade Id:** 9
- Description:** WHSE4 GENERAL MAINTENANCE
- Rates:**
 - Regular Time:** 18.45
 - Overtime Rate:** 27.75
 - Double Time Rate:** 36.90

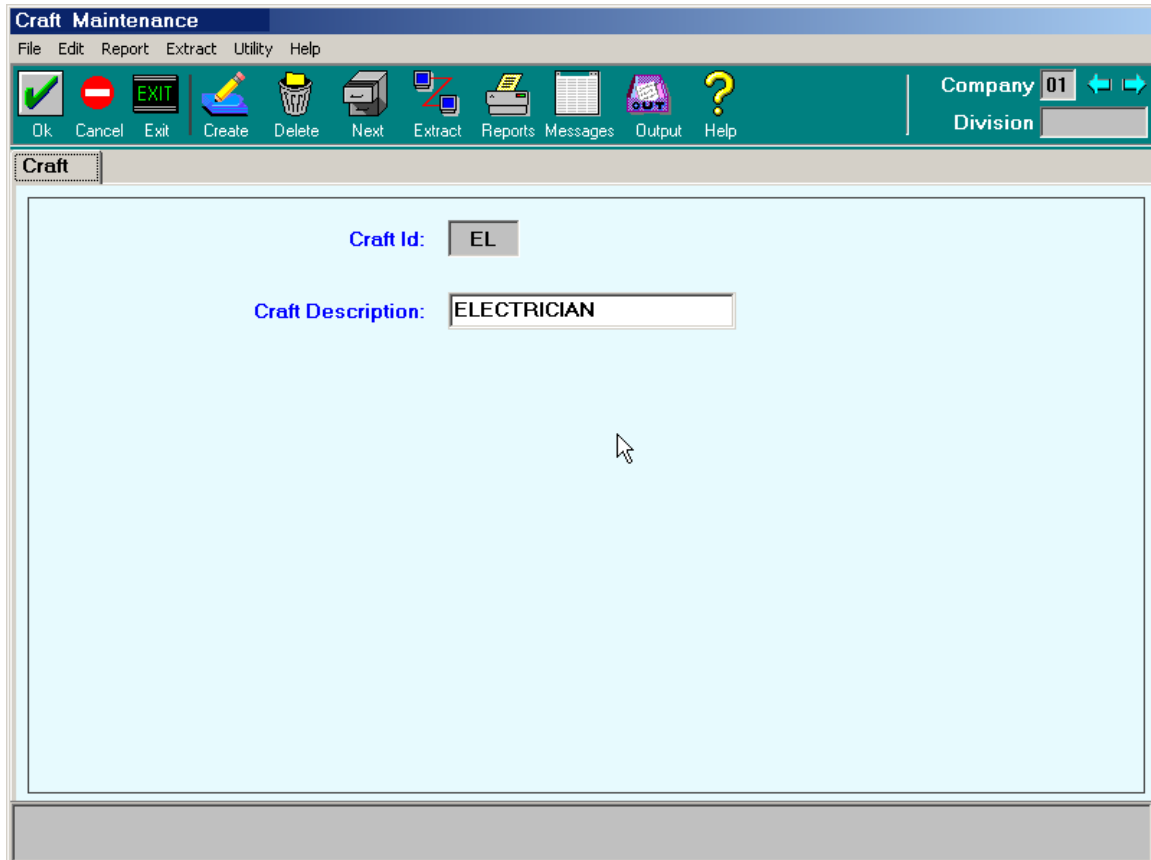
FIGURE 3

Labor Grades are not required if you have chosen a different method for labor costing in Company / Division maintenance, or have decided on no labor costing at all.

Crafts

Crafts are another mechanism for scheduling and planning labor requirements.

A “craft code” in SMMS is used to categorize labor by the type of skill or labor grade required.



The screenshot displays the 'Craft Maintenance' application window. The title bar reads 'Craft Maintenance'. The menu bar includes 'File', 'Edit', 'Report', 'Extract', 'Utility', and 'Help'. The toolbar contains icons for 'Ok', 'Cancel', 'Exit', 'Create', 'Delete', 'Next', 'Extract', 'Reports', 'Messages', 'Output', and 'Help'. On the right side of the toolbar, there are fields for 'Company' (01) and 'Division'. The main window area is titled 'Craft' and contains a form with two fields: 'Craft Id:' with the value 'EL' and 'Craft Description:' with the value 'ELECTRICIAN'. A mouse cursor is visible over the form area.

FIGURE 4

When you set-up a procedure, you use “craft codes” to identify the labor categories required, and the estimated hours for each craft. Large or long-running procedures can also tie-in craft codes to specific procedure tasks.

This allows you to set-up procedures with estimated skill and time requirements without the need to pre-assign procedures and orders to specific employees or teams.

User-Defined Fields

User-defined fields are available in SMMS for employees, parts and equipment.

The User-Defined fields allow you to define and track your own data elements as part of the system.

The screenshot displays the 'Employee Maintenance' application window. The title bar reads 'Employee Maintenance' and the menu bar includes 'File', 'Edit', 'Report', 'Download', 'Utility', 'Notebook', and 'Help'. The toolbar contains icons for 'Ok', 'Cancel', 'Exit', 'Create', 'Delete', 'Copy', 'Next', 'Extract', 'Reports', 'Messages', 'Output', and 'Help'. On the right side of the toolbar, there are fields for 'Company' (01) and 'Division'. Below the toolbar, there are tabs for 'Employee', 'User Defined', 'Notes', and 'Labor'. The 'User Defined' tab is active, showing the 'Employee Id' as 'BIENVENT' and the name 'THOMAS CARLODEGA'. A table with three columns is displayed: 'CATG', 'DATA', and 'AD'. The table contains three rows of data:

CATG	DATA	AD
VACATION ALLOWANCE - DAYS	14	
VACATION DAYS USED	3	
DATE LAST SAFETY TRAINING	06/07/2002	

To the right of the table, there is a 'Change' button with a pencil icon.

FIGURE 5

In the example shown in Figure 5, User-Defined fields are being used to track employee vacation time, and safety training.

Employee Labor History

Completed Date	Work Order	Task Id	Craft	Equipment	Procedure	Regular Hours	Overtime Hours
9/18/00	115984		ME	BUILDOFFIC	TBD	1.50	
9/12/00	115918		ME	CARTONER01	TBD	.45	
9/12/00	115900		ME	SAFETY	TBD	2.00	
8/29/00	114945		ME	BUILD	LIGHTPLANT	8.00	
8/26/00	115225		ME	BUILD	TBD	8.00	
8/25/00	115121		ME	BUILD	*TEMP23049	5.00	
8/06/00	115621		ME	BUILD	TBD	1.00	

FIGURE 6

The Employee program also has a screen showing the labor history for the employee. The labor history is compiled from work order reporting, and shows the total hours for each work order the employee has reported time on.

If authorized, the hourly rates and totals are also shown.