IDYNAMICS WORKING HOURS

USERS' GUIDE

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Author Name:	**DPT. I+D+I**

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INDEX

iDynamics Working Hours

iDynamics Working Hours is inteded to control the hours worked by employees of the company, allowing to have a detail of the ordinary, overtime and extra hours carried out by each employee, both daily and monthly. Managing, in addition, medical leave, absences and vacations.

> NOTE
>
> This program complies the requirements of Royal Decret Law 8/2019, of the Spanish government, which requires the register of the hours worked by employees.

- Setup

This section of the manual explains how to create schedules and assign them to work centers and/or employees. In addition, indicates how to set up holidays, types of absences and employees.

- Report of Employee Worked Hours

For those companies in which employees will proceed to report daily their working hours, or for those cases in which RR.HH. would like to register the incidents to the schedule (absences, overtime, etc.), this document explains step by step how to report the hours worked in a day.

- Vacations and Medical Leave

Indicates how to report periods of time in which an employee is going to be absent, either by vacation or some kind of medical leave.

- Employee Entries

Combining work center and employee configuration, hours report, and absences, iDynamics Working Hours generates a history of entries in which the hours worked by each employee are detailed, day by day.

- Work Report

Monthly, or for the period specified by the user, the application allows to generate a report, printed or in PDF, with the summary of hours of the employee or work center.

1. Setup

1.1. Work Centers

iDynamics Working Hours introduces the entity "Work Center" into the system, which allows to define the location at which an employee physically works (or is dependent on, in the case of an employee working outside the office).

The work centers serve as a grouper of employees and they will allow us to define the schedules and public holidays that apply to staff depending on the center.

We can access the management of centers from the menu *Setup and extensions > Manual Setup* of Business Central, and filtering the configuration by the category *HR*.

Accessible from the previous menu, or by looking for *Work Centers* in the search bar of Dynamics 365 Business Central, we'll access the list of centers.

Accessing the file of one of the existing centers, or pressing the button *New*, it will be shown the card of the center, in which we can indicate its basic data (*code*, *description*, *address*).

In addition, we will see two lists that will allow us to configure, in detail, the day of default work of the center:

Work Center Schedule

Here we visualize the active schedule of the center and the future schedules, including the date in which they will take effect. We can add any schedule registered in the system, indicating the date on which it will start to be applied (and the timetable in force up to that moment will be deactivated).

Considerations:

- If we want to visualize the past schedules, in the action bar of the list we count with the option *Manage > Show old*.
- Schedules, in addition to being applied at the work center level, can be applied at the employee level.

Holidays and Special Schedules

In this section we can configure exceptions to the schedule assigned to the center. The *holidays* shall be regarded as non-working days, and *special schedules* will allow

you to specify a different schedule from the one that would correspond to the day according to the schedule.

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DATE	DESCRIPTION	TYPE
01/01/2019	Año nuevo	Holiday
22/01/2019	San Vicente Mártir	Holiday
19/03/2019	San José	Holiday
19/04/2019	Viernes Santo	Holiday
22/04/2019	Lunes de Pascua	Holiday
29/04/2019	San Vicente Ferrer	Holiday
01/05/2019	Día del trabajador	Holiday
09/09/2019	Día de la Comunidad Valenciana	Holiday
12/09/2019	Fiesta Nacional	Holiday
06/12/2019	Día de la Constitución	Holiday
24/12/2019	Sólo se trabaja por la mañana	Special Hours
25/12/2019	Navidad	Holiday
31/12/2019	Sólo se trabaja por la mañana	Special Hours

We can manually sign up each of the applicable holidays, or use the option *Manage > Apply Template* to bring a predefined set of holidays.

By default, this list only shows the current year's holidays. You can display the public holidays of previous years by clicking on *Manage > Show Past Holidays*

In the case of *special hours*, we can click on the date to open the card and configure the schedule that will be held that day in the work center.

NOTE

For practical purposes, it is equivalent to register a special schedule or configure a work center schedule that is valid only for one day. The use of special timetables is

more agile for specific exceptions, while the change of timetable will be useful in those cases where the timetable is shared among a multitude of centers or is repeated frequently.

1.2. Employees

iDynamics Working Hours adds several fields and actions to the employee card. At the level of configuration, in the action bar we can find an option of *Working Hours*

From here, we can assign work schedules directly to the employee that will prevail over his or her workplace schedule. This allows us to contemplate cases in which, for some reason, an employee's schedule does not coincide with one established for his or her work center.

Related to the previous point, in the *General* tab of the employee file we can define the associated work center. In this way, the employee automatically inherits the schedules and public holidays that would have been configured in it.

In the *Administration* tab we can find two new fields to specify the Dynamics 365 Business Central user associated to the employee and their account contribution. Both fields are optional, and are used as follows:

- If a user is assigned, this user, with basic permissions on the application, will be able to report their daily hours.
- The contribution account is merely informative and will be included in the hours report of the employee.

Administration

Employment Date	01/03/1996	Emplymt. Contract Code	
Status	Active	Statistics Group Code	
Inactive Date		Resource No.	AVELINO
Cause of Inactivity Code		Salespers./Purch. Code	AB
Termination Date		User ID	Avelino.garcia@cronus.es
Grounds for Term. Code		Contribution Account	01123456742

Finally, in the *Personal* tab, we will have a field to indicate the *VAT Registration No* of the employee. Like the contribution account, this data is for information purposes only and will be used exclusively in the hours worked report.

1.3. Working Schedules

From the *Manual Setup* section of Dynamics 365 Business Central we have access to the configuration of the different working schedules that can be applied to work centers and employees.

Dynamics 365 Business Central			Sandbox
CRONUS ES	Finance v	Cash Management v	Sales v	Purchasing v	**Setup & Extensions** v	Intelligent Cloud Insights v

Manual Setup: HR v | Search | Open in Excel | More options

NAME	DESCRIPTION	AREA	KEYWORDS
Holiday Templates	Groups of holidays that can be assigned to work ...	HR	iDynamics Working Hours, Holidays, Vacations
Human Resources Setup	Define how you manage employee data.	HR	Human Resources, HR
Work Centers	The different work centers for the current company.	HR	iDynamics Working Hours, Work Centers, Locatio...
Work Schedules	Weekly work schedule templates.	HR	iDynamics Working Hours, Schedule, Shifts, Times...

The schedules allow us to define the time blocks in which we will work each day of the week (up to a maximum of three per day).

If the *Flexible* option of the header is checked, we will indicate that there is no schedule fixed per day. This will require employees to report hours worked every day.

1.4. Holiday Templates

Like schedules and work centers, accessible from the Manual setup screen, filtering by category HR, holiday templates allow us to preset festive groups (e.g. "National Holidays 2019"), so that we can apply them quickly to a work center.

The only thing needed to create a template is to assign a code and description and detail the list of public holidays with their date and description. When applied to a work center, these days will be considered non-working days.

Note: The creation of templates is completely optional. For companies that have only one work center, the registration of public holidays can be carried out directly from the work center card.

2. Daily Activity Log

2.1. What is the daily activity log?

When we configure the product for the first time and assign a schedule to the employee or his/her work center, we will already have a predetermined work schedule. If an employee works every day within his/her predefined schedule without variations, there will be no need to do anything more to get his/her monthly summary of worked hours (the application will apply those that correspond to his/her schedule).

However, if one day there is an incident, it may be that you work a schedule ouside the normal one, or temporarily absent to go to the doctor, it will be necessary to specify it using the working Hours Report.

2.2. Reported by Human Resources.

If it will be the administration employees who will be responsible for discharging the incidents to the schedule, these users can access the hours report from the employee card, through the *Worked Hours* action in the *Process* menu, or from the employee list in the *Process* menu.

AG · Avelino · García

Process   Report   Employee   Navigate   More options

Pay Employee   Absence Registration   Worked Hours
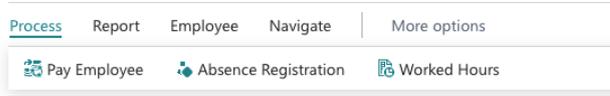
2.3. Reported by the Employees Themselves

If employees have a user with whom to access Dyanmics 365 Business Central they will be able to report their hours themselves, as long as they assigned the role "IDYN-WHR User" and are assigned to an employee. To do this, the users will be able to access the report page by searching for *Worked Hours* in the search engine of the product.
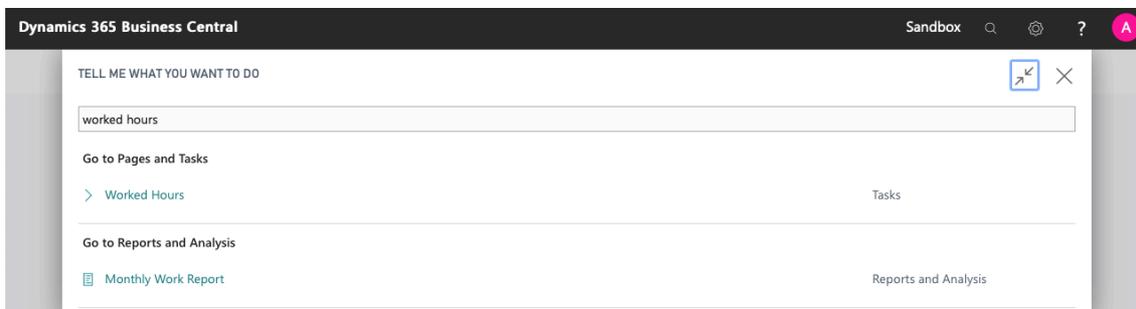
2.4. Daily Activities Log

Either by the actions of the employee file, or by the search engine of Dynamics 365 Business Central, we will arrive at a list in which we will be able to see the days for which it exists worker report as well as the total number of hours reported for that day.
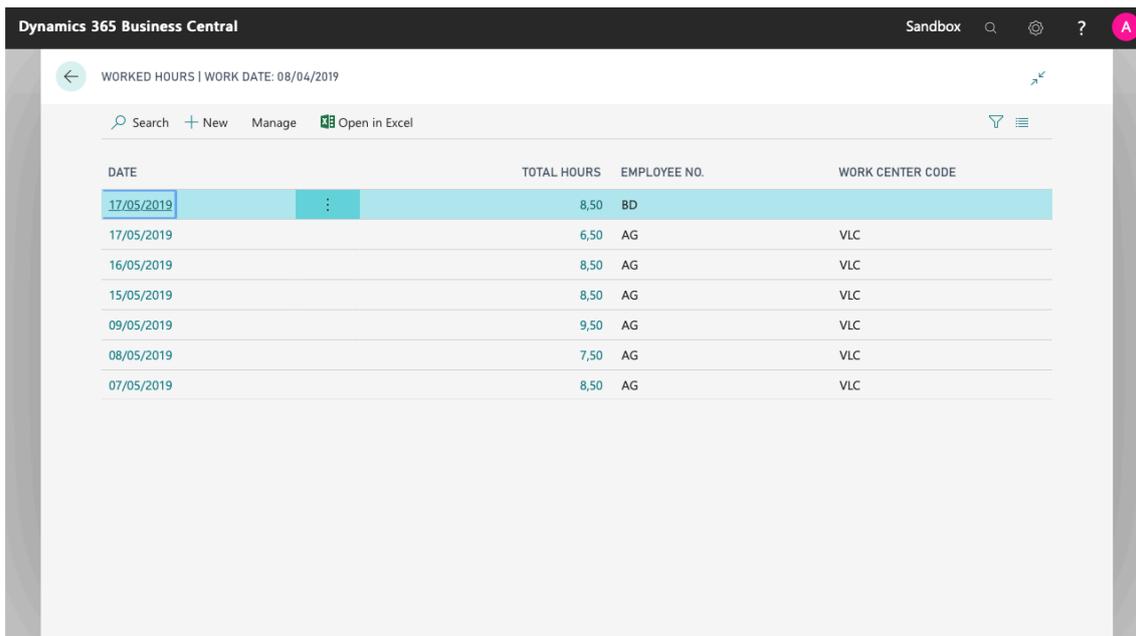
Within the daily activity document we can indicate the date of the report, and a list of time slots in which to indicate the hours worked that day, as well as absences.

For each time slot, we can indicate whether ordinary, overtime or extraordinary hours have been worked. Likewise, we can report absences within the working time (e.g. doctor's visit).


Note: it is not necessary those absences that are recoverable. If an employee is absent an hour to do some personal task, the only thing he/she will have to report is the schedule (real) in which he/she has worked, detailing when he/she were absent and when he/she made up that hour.

For absences that occupy the entire day, and that may last several days (e.g. medical leave, holidays), the report can be made on a daily basis, or reported using the report from absences Dynamics 365 Business Central standard.

2.5. Frequently Asked Questions

- When we generate the hours report, the hours of the work center/employee schedule will be used on days when there is no report, and the one of the report on days when it exits.
- If you want employees to report their hours worked every day, you can do it by assigning a flexible schedule to the employee or work center.
- This record can be generated from devices (e.g. fingerprint readers) or other devices external applicationsm using the developer API of the application.

3. Vacations and Medical Leave

When an absence is during **a few hours of a partiuclar day**, it will be necessary to use the daily activity logto report it. When the absence corresponds to one or more **complete days**, we can also use the option *Absence Registration* of the Dynamics 365 Business Central.
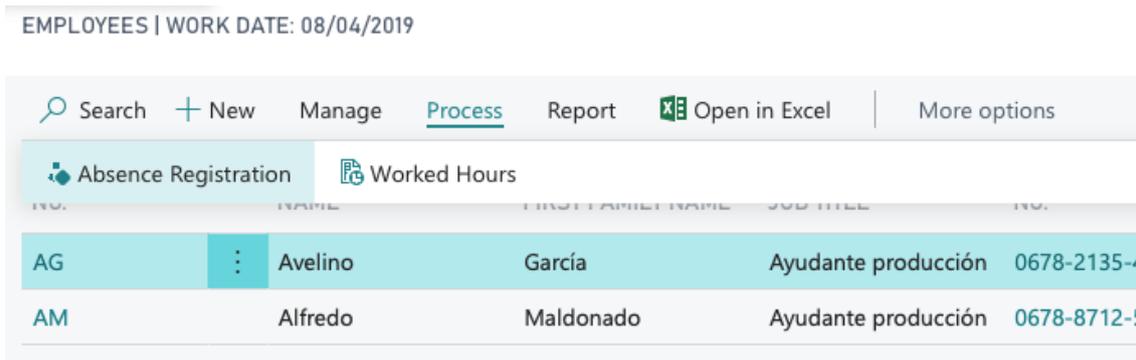
From this screen, a user with permissions can indicate a date period in which the employee has been absent, whether due to illness, vacations or other reasons.
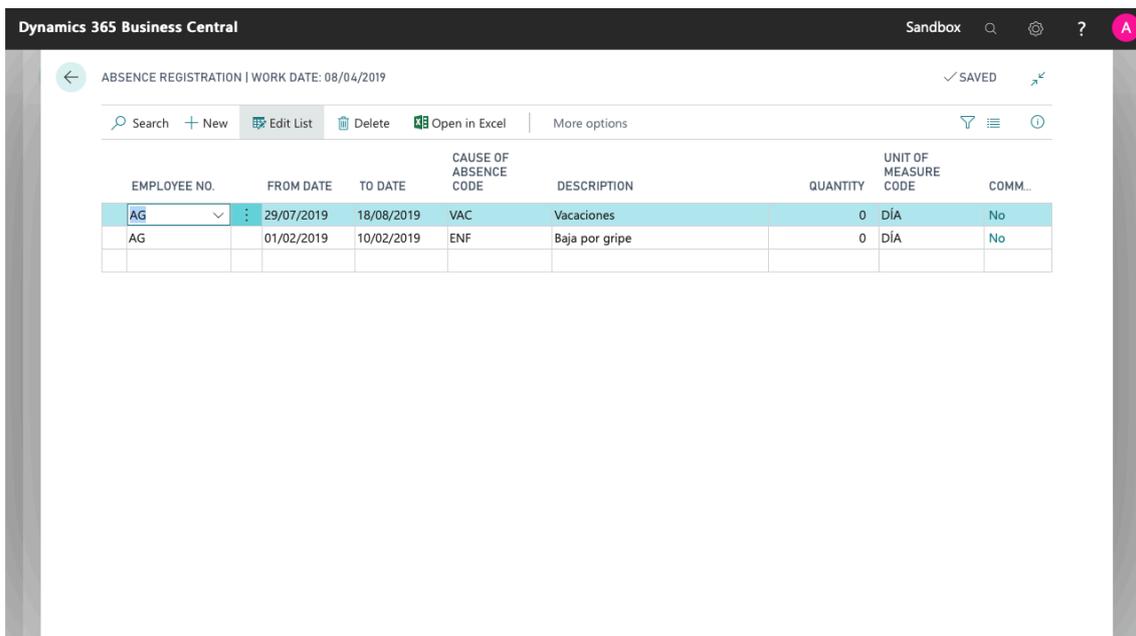
When iDynamics Working Hours generates the monthly hours report, corresponding to the employee, will take into account the absences indicated here, and will generate a movement of absence for each day on which, according to the employee's ot centre's schedule, exits a working schedule.

NOTE

iDynamics Working Hours currently does not use the *quantity* and *unit of measure* of Microsoft Dynamics 365 Business Central , so it is not necessary to fill them in.

4. Employee Entries

4.1. General Description

Combining office and employee configuration, hours report and absences, iDynamics Working Hours generates a history of entries in which the worked hours are detailed by each employee, day by day.

4.2. Generation of Entries

These entries can be created manually by clicking on the action *Update Entries* from the action bar. In addition, they will be created automatically when the hours report runs for a date period.

Once created, the same action as *Update Entries* in the action bar, or the action Update employee entries of the report of hours, allows you to delete existing entries and recreate them with the updated data of hours report, or any configuration (e.g. schedule) that would have varied.

IMPORTANT

In order to allow audits to be carried out that validate that the data have not been manipulated, all records store internally the last change data and the employee who generated them.

4.3. Blocking Entries

From the action bar of the list of entries we have the action *Block entries*. Since all the entries include information of the date in which they have been modified, the objective of this action is to be able to block those entries that have already been reviewed with employees (when iDynamics Working Hours is used to comply with legal requirements) and prevent them from being regenerated, with the consequent update of the change date, by mistake.

This lock is merely to prevent unwanted updates, and can be undone at any time, by selecting the enties you want to unlock and choosing the action available in *More Actions > Actions > Un lock entries*.

Note: Both lock and unlock actions update the change date of the record.

4.4. Detailed Entries

Using the action *View Detailed Entries.* from the action bar we can obtain the detail by the hour of the day.

5. Work Report
5.1. General Description

The work report gives us a summary of the hours performed by the employees over a month, or an arbitrary period of dates, detailing the number of hours which corresponds to ordinary, overtime or extra hours, as well as absences; all broken down by days.

This report is available from both the employee list and employee card, as Monthly Work Report of the action bar, as from the card in the work center.

5.2. Report Options

When we run the report, the first thing we will be asked to do is the month, or period of dates for which we want to obtain the data.

At the bottom of the dialog window we have the filters to apply to entries of employee, which is the table that contains the information on hours worked. By default, we are offered the possibility of filtering by work center employee and schedule.

In addition to all these filters, we have the following options.

Update Employee Entries

When we launch the report, and for day/employee combination, we check if it already exits an employee movement, with the information about what he/she worked on that day. If that does not exist, the application queries the daily activity, the work center schedule of the employee schedule and whether it is a public holiday. And, depending on all this information, generates the corresponding employee entries.

If changes occur after the report has been generated, this action forces the regeneration of all the entries of employee for indicated filters.

Note: when entries are regenerated, their date of creation/modification is stored next to them. This is done in order to keep track of changes in the event that a labour inspection is carried out in respect of the work report. Therefore, we recommend using this option only when we consider that there have been produced changes to the report or configuration. To avoid launching this process, by mistake, on entries that are already considered definitive, iDynamics Working Hours offers one option to block entries.

Show Detailed Report

By default, the report shows the total number of hours/absences per day, indicating the time when the day began and the time when it ended. In case of selecting this option, an attachment will be included with the detail hour by hour each day, including the breaks that would have taken place.

Dynamics 365 Business Central   Sandbox   🔍 ⚙ ? A

WORKED HOURS

May of 2019

CRONUS ES

Valencia

Address: **Avda. Jacinto Benavente, 3**

              46005 Valencia

VAT Reg. No.: **77777777A**

Avelino García

VAT Reg. No.:

Social Security No.:

Contribution Account: **01123456742**

Daily Detail

		Start	End	Hours	Type	Schedule Code	Comments
2	Thursday						
		8:30	14:00	5,50	Ordinary Hours	PARTIDA_VLC	
		15:30	18:30	3,00	Ordinary Hours	PARTIDA_VLC	
3	Friday						
		8:30	15:00	6,50	Ordinary Hours	PARTIDA_VLC	
6	Monday						
		8:30	14:00	5,50	Ordinary Hours	PARTIDA_VLC	
		15:30	18:30	3,00	Ordinary Hours	PARTIDA_VLC	