# Location and Holiday Editor

ⓘ Locations are used throughout Projector. The four places you will see them applied are to resources, projects, time cards, and expenses. The one place where you won't see them defined is for cost centers. Your organization may have geographic cost centers, but this is not a requirement. As locations touch a number of aspects of the Projector software, please see the the subsections below to learn how settings apply to them.

The location editor is reached from the **Administration tab | Organizational Structure Heading | Locations and Holidays** subsection and double clicking a location.
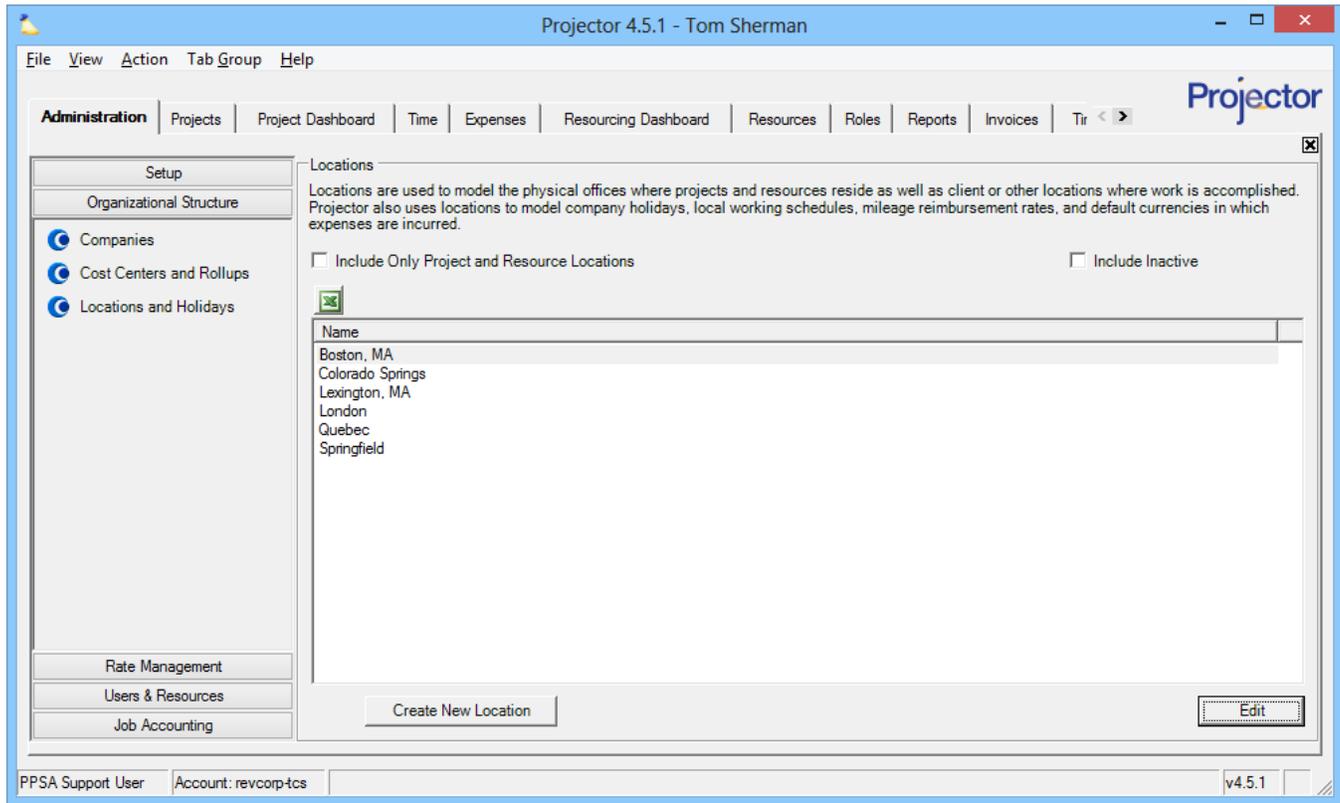
Permissions and Settings

To make changes on this tab you need the global permission **Locations & Holidays** set to **Update**.

The working hours for a day must be in increments of your scheduling settings - System Settings Editor Scheduling Tab.

Locations can be assigned to expenses. The location determines the currency we expect the expense to be in. For example, if you incur an expense in Ireland we'd expect it to have been in Euros.

Locations can be assigned to projects. It determines the default **Hours per day** for the project. Hours per day is in turn used for detailed task management planning and daily billing calculations. It is also used for reporting.

Locations can be assigned to resources. It determines the default working hours for the resource. It is also used for reporting.

Location Management

The main location window shows all the locations in your installation. You can optionally cull the list down to just locations associated with a resource or project by ticking the **Include Only Project and Resource Locations** checkbox (excluding locations only associated with time and expense).

☐ Include Only Project and Resource Locations   ☐ Include Inactive

[Excel icon]

Name
Boston, MA
Colorado Springs
Lexington, MA
London
Quebec
Springfield

Add Location

Click the **Create New Location** button at the bottom of the location browser.

Delete Location

Right click a location and choose **Delete Location**. If a location is used in the system then you won't be able to delete it. You should inactivate the location instead.

Inactivate Location

Edit an existing location and tick the **Inactive** checkbox. Inactive locations will not be selectable for new projects, new resources, new time cards, and new expenses. Existing projects, resources, time cards, and cost cards will keep the location though.

Edit Location

Double click on any location to start editing it. See the help sections below on what the editor settings do.

Location Editor

This section gives only tactical information about what each of the settings on this tab do. In the subsequent sections devoted to Resources, Projects, Time, and Expense you will find specific examples of these settings in action.

General Settings

These are settings that are generic to each location.

Setting	Description
Name	Enter a name that describes this location. Your locations can follow whatever amount of granularity you choose. They can be by country, by region, or by city. It makes sense to sit down and determine the level of granularity you want available in reports before defining all your locations. Remember that your project managers and resources will be selecting from your locations list, so you don't want 1000 locations.
Currency	The list of available currencies is driven by the Currencies and FX Rates Editor. Select the currency that this location uses. When expenses are entered as having been incurred at this location, we'll default to the currency. For example, expenses incurred in England would default to GBP.
Inactive	Inactive locations will not be selectable for new projects, new resources, new time cards, and new expenses. Existing projects, resources, time cards, and cost cards will keep the location though.
Enabled for time cards	Allow resources to select this location when entering their time
Enabled for cost cards	Allow resources to select this location when entering expenses
Mileage Unit	When resources report mileage as an expense, the location determines whether they report in miles or kilometers. Because this setting is only for expenses, you have to tick **Enabled for cost cards** to access this setting.

Working Schedule Tab

Working hours determine the days of the week and the hours of each day that this location conducts regular business operations. These are the **Normal Working Hours** for this location. All resources assigned to this location will have this schedule by default. The schedule can be overridden through the resource editor on a person by person basis.

In addition, the working schedule is used when you create unnamed requests or bookings on your projects. These roles need to have normal working hours just like a named resource or your reports won't produce results that make sense. These unnamed roles inherit the location's working schedule.

Setting	Description
Projects and resources may be associated with this location	Tick the checkbox if you want projects or resources to be assignable to this location
Hours/Day for Task Planning	When you create a new project, the location determines the Hours/Day setting found on the project info tab. This can be overridden on a per project basis.
Working Day	Tick the checkbox for each day of the week you expect resources to work
Duration	Type in the number of hours you expect someone to work this day

Holidays Tab

If this location is used for resources or projects then you should fill out the holiday schedule. Resources do not need to enter time on holidays. For schedulers, the holiday schedule lets them know when resources are out-of-office. If you are using our scheduling module, then you should enter holidays even if the location is enabled for Projects only. This is because unnamed resources will use this holiday schedule.

Holidays are different than time-off like vacation or personal days. To manage this type of time-off, use the resource editor.

| Working Schedule | Holidays | Mileage Rates |

Date	Name	Time Off		
01-Jan-2013	New Year's Day	Full Day	Edit	Delete
21-Jan-2013	Martin Luther King Jr. Day	Full Day	Edit	Delete
18-Feb-2013	President's Day	Full Day	Edit	Delete
27-May-2013	Memorial Day	Full Day	Edit	Delete
04-Jul-2013	Independence Day	Full Day	Edit	Delete
02-Sep-2013	Labor Day	Full Day	Edit	Delete
14-Oct-2013	Columbus Day	Full Day	Edit	Delete
28-Nov-2013	Thanksgiving Day	Full Day	Edit	Delete
29-Nov-2013	Turkey Recovery Day	Full Day	Edit	Delete
25-Dec-2013	Christmas Day	Full Day	Edit	Delete
New				

The options on this subtab are pretty self explanatory. Click **Edit** on any existing row to change the date, name, or whether it is a full-day or half-day off. To add a new holidays, click the **New** button at the bottom of the list. You can add half-days or less than full days by ticking the **Partial Day** checkbox. The number of hours you enter will be subtracted from the resource's normal working hours.

Edit Holiday

Name* Columbus Day

October 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Date 14-Oct-2013

☐ Partial Day   24.00   hours off

OK   Cancel

Next Year's Holidays

If you are adding holidays for a new year, do not edit existing holidays and change the date. This will break the baselines of all your reports. You should add each holiday for the new year manually.

Mileage Rates Tab

Based on a resource's location you can set the reimbursement rate for distance traveled. The rate is time phased based on the incurred date. Finally, you can choose whether distance is measured in kilometers or miles.

The currency used for reimbursement is set by the resource's cost center and doesn't change based on location. For example, if Sally lives in the US and goes for a drive in Canada she'll still be reimbursed in USD.

> ⚠️ **Location and Cost Center Mismatch**
>
> If a resource's location is in one currency and cost center is in another currency - Projector won't be able to calculate a reimbursement rate. The user will need to manually enter their distance and compensation rate. For example, let's say a Canadian resident works for a US company and is paid in USD. If they drive their car, they would expect to be reimbursed using Canadian rates. Projector does not support this scenario.

Working Schedule | Holidays | **Mileage Rates**

	Begin Date	End Date		USD per Mile
1	<--	31-Dec-2009	...	55.0000
2	01-Jan-2010	31-Dec-2010	...	50.0000
3	01-Jan-2011	30-Jun-2011	...	50.5000
4	01-Jul-2011	31-Dec-2011	...	55.5000
5	01-Jan-2012	31-Dec-2012	...	55.5000
6	01-Jan-2013	-->	...	56.5000

Resource Locations

Resource locations are set through the Resource Info Tab and the Resource History Tab.

Edit Resource History

Effective Date	27-Jun-2013		☐ Inactive
Resource Type	Salaried	▼	☑ Billable
Cost Center*	RevCorp US	▼	☐ Temporary

☐ Override cost center mapping for revenue and expenses to

RevCorp US

☑ This resource may approve their own time

Location*	Colorado Springs	▼
Title*	Creative - Designer	▼
Pay Category*	Salaried Without Overtime	▼

Missing, Draft or Rejected Time

☑ Track missing time for this resource

☑ Send missing, draft or rejected time emails to this resource

Working Schedule	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Override Location Schedule	☐	☐	☐	☐	☐	☐	☐
Working Day	☐	☑	☑	☑	☑	☑	☐
Start Time		8:00 AM	8:00 AM	8:00 AM	8:00 AM	8:00 AM	
Duration (hours)		8.00	8.00	8.00	8.00	8.00	

☐ Override Standard Resource Direct Cost (RDC)

Hourly Cost*		Currency*	

OK   Cancel

Once your location is chosen, it drives what your holidays are. When you log into time entry you will see that holidays are automatically grayed out, just like a weekend day. Here, the fourth of July is a holiday.

30 JUN	01 JUL	02 JUL	03 JUL	04 JUL	05 JUL	06 JUL
SUN	MON	TUE	WED	THU	FRI	SAT

When schedulers go to book your resources, they will see that they are unavailable on holiday days.
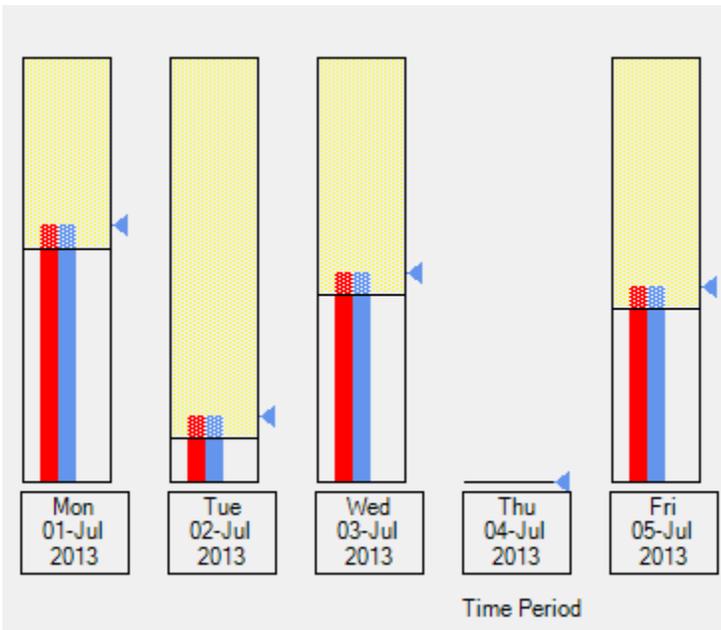
Project Locations

Setting your project location determines the default **Hours/Day** setting on a project. This serves two primary functions. First, it is used for detailed task management planning to figure out how many days something will take to complete. DTM scheduling is done in hours. So (Hours per Day) / Hours = Days of Work. For example, (20 hours of work) / (8 hours per day) = 2.5 days of work. Second, this setting is used for daily billing calculations. Daily billing rounds time up to equal a whole day. For example, if I work 5 hours today, then it gets rounded up to 8 hours of billable labor.

Project locations are also used for determining the working schedules of unnamed roles. That way when the role is eventually filled, hours will not need to be reconfigured to match the resource's actual schedule.

Time Locations

When your resources go to enter their time, they will have the option of choosing the location of work. Each location marked **Enabled for Time Cards** is available in the list. You can force them to choose a location for every time card through system settings flag called **Require Locations on Time Cards**.

Expense Locations

When entering expenses, your resource's have the option to specify a location. Each location marked **Enabled for Cost Cards** is shown in the list. You can force them to choose a location through the system setting **Require location on cost cards**.

If the selected location's currency differs from the resource's currency, then Projector automatically assumes you will be converting currencies and gives you options for managing that conversion.

The following table summarizes the settings that govern access to locations in expense entry and what each combination presents to the end user.

Location Required + Multiple Locations

Location defaults to "no location." Users need to pick a location before they can submit expenses. Otherwise they are rejected.

Require location on cost cards = true

Enabled for cost cards = true for two or more locations

Location Required + One Location

Location field is not shown during expense entry. Your one location is automatically applied to all expenses.

Require location on cost cards = true

Enabled for cost cards = true for just one location

Location Required + No Locations

You can enter expenses, but they will be immediately rejected when submitted. You will need to enable a location for cost cards to successfully submit.

Require location on cost cards = true

Enabled for cost cards = false for all locations

Location Not Required + One or More Locations

Defaults to no location. Users need to pick a location as needed.

Require location on cost cards = false

Enabled for cost cards = true for two or more locations

Location Not Required + No Locations

Location field is now shown. All expenses default to "no location."

Require location on cost cards = false

Enabled for cost cards = true for no locations

Reports

Projector reports make locations available for grouping. You will see the following row fields available in select reports.

- Resource Location
- Project Location
- Work Location (time card)
- Expense Location (cost card)

Unknown macro: 'sidebartoc'