

## BENEFITS

**Increase productivity.** Perform calculations of accrued vacation and sick time automatically during the Calculate Checks process.

**Manage multiple plans with ease.** Define an unlimited number of calculation formulas for accruing vacation and sick time, as well as special features for managing carry-overs, waiting periods, and maximums.

**Access real-time information.** Display updated vacation and sick time balances for the current pay period on the employee paycheck stub and Business Portal.

**Automate manual processes.** Set up PTO plans for defined groups, replacing time-consuming manual processes and making maintenance and upkeep easy.

**Improve data accuracy.** Reduce data entry with defined PTO plans that are assigned to each employee based on factors that you define.

**Streamline budgeting and forecasting process.** Deliver fast and easy access to PTO information with standard reports and on-demand SmartList reports.

## PTO Manager for Microsoft Dynamics GP

Manage complex vacation and sick time policies automatically with PTO (Paid Time Off) Manager for Microsoft Dynamics™ GP. Reduce overhead costs by reducing paperwork and the time required by the Payroll team to manage manual PTO recordkeeping.

Enable your staff to manage complex and changing payroll situations quickly and accurately while offering better service to your employees.

**Accrual Schedule Setup**

Range	Calculation	Maximum Hours	
From	To	Factor	
1.00	5.00	0.03850	3.00
4.00	5.00	0.04560	4.62
6.00	99.00	0.05510	5.50
0.00	0.00	0.00000	0.00

**Employee PTO Setup**

Employee: BARR0001  
Adam Barr

Use Custom Accrual Method    Next Anniversary Date: 10/23/2007

Accrual Schedule	Code	Description
Vacation Accrual Schedule 1	FTVAC	Full Time Vacation Schedule
Vacation Accrual Schedule 2	FTSICK	Full Time Sick Schedule
Sick Accrual Schedule 1		
Sick Accrual Schedule 2		

**Vacation Waiting Period**

Recurring Waiting Period  
 Based on Anniversary Date

Waiting Period Expires: 0/0/0000  
Hours Pending: 7.35

**Sick Waiting Period**

Recurring Waiting Period  
 Based on Anniversary Date

Waiting Period Expires: 0/0/0000  
Hours Pending: 6.35

**Vacation Maximums**

Calculate on Anniversary Date  
 Allow Carry Over  
Maximum Carry Over: 120.00  
Total Maximum Hours:   
 Fixed  Variable  
Hours Allowed:

**Sick Time Maximums**

Calculate on Anniversary Date  
 Allow Carry Over  
Maximum Carry Over: 120.00  
Total Maximum Hours:   
 Fixed  Variable  
Hours Allowed:

**Life-To-Date Hours Worked**

Vacation Hours	470.00
Sick Time Hours	320.00

**Year-To-Date Accrued Time**

Vacation Time	56.25
Sick Time	69.69

CREATE UNLIMITED NUMBERS of accrual schedules.

INCLUDE WAITING PERIODS and maximum settings in your accrual schedules.

## FEATURES

## PTO MANAGER

<b>Flexible Configuration Schedules</b>	Set up ranges that determine the calculation factor to be applied to the number of hours worked in the pay period. Ranges can be based on hours worked, years worked, hours worked life-to-date, and hours worked year-to-date. Establish maximum allowable amounts for a payroll period or calendar year.
<b>Easy and Quick Setup</b>	Improve efficiency with easy accrual schedule setup using the Employee Setup window to configure the accrual and maximum settings. Appropriate accrual schedules are assigned to eligible employees.
<b>PTO Policies Setup</b>	Ensure fair and consistent policy enforcement by incorporating your existing PTO policies. Have confidence that PTO is being administered, recorded, and reported properly, including reliable application of Use It or Lose It policies.
<b>Tight Integration</b>	Full integration with Payroll in Microsoft Dynamics GP provides real-time calculation, balance reduction, and management of PTO policies.
<b>Automatic Balance Maximums</b>	Limit the number of hours an employee can have in their balance at any given time. This maximum can be a fixed amount or an amount based on a years-worked schedule, in which case it will automatically adjust when the employee passes their anniversary date.
<b>Detailed Reports</b>	Create detailed reports for your organization to generate human resources, payroll, financial, and audit information. Use the SmartList functionality to help with one-time information needs.
<b>Full Microsoft Dynamics GP Product Benefits</b>	PTO Manager is fully tested, documented, and supported by Microsoft. All planned upgrades are available, as well as robust support from the award-winning Microsoft Support Services Team.

For more information about PTO Manager for Microsoft Dynamics GP, visit [www.microsoft.com/dynamics/gp](http://www.microsoft.com/dynamics/gp).