



## Administration

The PCB X3 Administration Module consists of the following key items:

- Application Tool-bar
- Human Resource (HR) Module
- Management
- Marketing
- Operation
- PCB X3 Library
- System Setup
- System Maintenance
- Task Manager

### Application Tool-bar

The PCB X3 Application Tool-bar consists of buttons that provide access to key modules or items. The following lists the sequence of all buttons on the tool-bar:

1. My Home
2. Main Menu
3. Report Menu
4. New Client Request
5. Task Manager
6. Calendar
7. User Notes
8. Find a Person or Job
9. Client Register
10. Site Register
11. Vendor Register
12. PCB X3 Library
13. Inventory
14. Loans to HRs
15. Cash Sales
16. Phone Caller Survey
17. Visit a Web-site
18. Create an Email
19. Windows Calculator
20. Microsoft Excel
21. Microsoft Word
22. Windows Notepad
23. PCB X3 Help Manuals

Moving with the mouse over a tool-bar button displays button's inscription.

### Human Resources (HR) Module

The PCB X3 Human Resource (HR) Module provides a solid solution for HR related functions and planning issues.

The module consists of the following items:

- HR Register
- HR Details
- HR Payroll Menu (see Finance Overview)
- HR Reviews
- HR Key Performance Indicators
- HR Absence Log
- HR Holiday Planner
- HR Print Options

### HR Register

The PCB X3 HR Register provides on-register search capability and defaults to show active HRs on opening. The register data can be sorted and the broad categories of employees, semi-contractors and GST entities can immediately be viewed and accessed.

The PCB X3 HR Register provides access to the above listed module components and the following transaction items:

- Cash Sales to HRs
- Purchases by HRs
- Quotes created by HR
- Sites managed by HR
- Projects managed by HR
- HR Job Labour Transactions
- General Ledger transactions for HR

Key date alerts such as birthdays and review dates are highlighted on the register and can be viewed in the calendar.

User tasks can be created for and associated with HRs.

HRs are available across all registered PCB X3 entities.

## HR Details

The HR Details consists of four sections that are grouped as shown and described below:

1. Details
  2. Employment
  3. Other
  4. History
1. **Details** – includes the basics such as name, address phone and dates of birth, commencement of employment and Email and Web address
  2. **Employment** – this section relates to the terms of employment and includes
    - HR occupation, skill level, business unit, position and department.
    - Trades/Services allocation for labour transaction classification
    - Standard hourly rate and overtime rate
    - On cost component of both
    - Pay frequency, number of hours and amount paid per frequency
    - Tax classification and allowances
    - Entity profit share option in per cent
  3. **Other** – the section consists includes
    - GST entity details such as name, ABN and Public Liability and WorkCover Insurance details
    - Long Service Leave reference and Super Fund Account and Fund Name
    - WorkCover classification and tax file number
    - Trade ticket and license number including expiry date
    - Bank account details
  4. **History** – the history section consists of:
    - Year-to-date payroll summary
    - Year-to-date pay summary
    - Year-to-date loan balance
    - Year-to-date material purchases reimbursed
    - Option to view summaries for logged in entity or across all entities
    - Print Year-to-date summary payroll info addressed to HR

The HR Details also allows adding a user task to the selected HR and viewing the task list.

HRs can be flagged as system users.

## Items not covered by this Overview

This Admin Overview does not cover the PCB X3 Admin Overviews for Management, Marketing and Operations.

## PCB X3 Library

The PCB X3 Library comes preinstalled with 16 library topics that allow the user to add unlimited number of headings (groupings) and allocate unlimited number of detail records to each heading. Detail records can be linked to external files.

The preinstalled library topics include:

1. Activities
2. Business Vision / Strategy
3. Competition
4. Complaints & Suggestions
5. Compliance
6. Contracts
7. Innovation & Learning
8. Job Descriptions
9. Knowledge
10. KPI
11. Marketing
12. OHS
13. Procedures
14. Projects
15. QA
16. Training

Some library topics are available for linking or association to other modules or transactions.

### Library Topics that can be linked to transactions:

- **Contracts** – can be used in quotes/jobs and service renewal notices
- **OHS** – allocate to projects
- **Projects** – create project library items and transfer them to quotes

## System Setup Module

The PCB X3 System Setup Module is available to designated administrators and provides the following functions:

1. **Server Options & Analysis** – connect to a different PCB X3 database and view current logins and other logs
2. **Entity Set-up and Settings** – is described in detail below
3. **User Set-up and Settings** – provides access to system users, user groups and access rights

### Key Entity Set-up and Setting Items

- Entity name and branch reference and addresses including Email and Web-site and contact details
- Entity type and industry applicable
- Entity profit sharing option
- Security mechanism for separation of functions
- External stationary usage or in-built report header option
- Entity slogan for Emails
- Entity Client – automatically created during set-up and required for default project warehouse
- Entity Vendor – automatically created during set-up and required for default project warehouse out-goings to job allocations
- Application and database environment and system and user folder locations
- Financial year settings and number of months in accounting period
- HR on-costs input and break-down
- Payroll standard hours per week and week start and end day
- Access to taxation specific entity settings (see Finance Overview)
- Banking details including Bpay information for sales invoices
- Standard client terms allocated to sales invoices including terms and conditions that can be sourced from the library
- Quote settings that are applied automatically to new quotes including terms and conditions that can be sourced from the library
- Other predefined quote related defaults
- Service job predefined defaults for contract renewals notices and more

## System Maintenance Module

The PCB X3 System Maintenance Module provides access to database table maintenance items and system back up and administration.

Database table maintenance items include low-level transaction categories that are used throughout in line items for quotes, labour and material purchase transactions and sales invoices.

## Task Manager

The PCB X3 Task Manager is fully integrated in all modules to provide instant access for capturing new tasks, view item selected specific tasks or display the Task Manager.

### Key Features of the Task Manager

- Unique short-to-medium and long-term overview that is collapsible for convenience
- Multiple lists provide instant 10 year overview of tasks and all lists are expandable
- Integrated with PCB X3 Calendar and Microsoft Outlook
- Convenient and fast task data-entry
- Parent/Child task options
- Recurring task options
- Rescheduling task options
- Task posting options
- Task finder

### Task details can be linked to:

- Business functions
- Trade/service categories
- HRs
- Clients
- Sites
- Client Requests
- Quotes
- Service Jobs or Projects
- External Files