Termination of an employee in Personalwolke Time

General

> **NOTIZ**
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> Note: This section deals with recording an exit in Personalwolke Time.
> You can find information on recording an exit in HR-Expert under Registration of Terminations in HR-Expert[1]

Contents of this chapter:

- Deactivating a person[2]
- Delete employee profile[3]
- Frequent error case regarding terminations[4]
- Termination during the month[5]

The following must be observed in the event of leaving with regard to the settlement of Personalwolke:

- The leaving date (Settings / Time recording / General: Leaving date) ends the option to record times.
- A person master record that has the "Active user" parameter ticked under Settings will continue to be charged in full.
- A person master record that does not have the "Active user" parameter ticked under Settings and is therefore inactive will continue to be charged with the fee for inactive users. Inactive persons can be analysed.
- A deleted person is no longer charged from the month of deletion and can no longer be analysed.

If the leaving date is not set in advance, time recording will continue and the account values will be incorrect.

In this case, the leaving date must be set retrospectively, and daily payroll accounting must be started from the leaving date (detailed description below).

Deactivating a person

If an employee leaves the company and their data is still to be analysed, the following steps are necessary for the departure:

1. Exit the time acquisition:

- In the **menu/Administration** folder, navigate to **Persons** and click on the person who is to leave.
- Go to the **Settings** tab and switch to **Time acquisition** in the drop-down menu.

- This mask then opens

- Scroll to Master data - General.
- Under Leaving date, enter the date of

resignation

- Scroll back up and save the change.

- This means that the person leaving cannot record any more times after this date.

2. Deactivate the user

- In the **Administration** menu folder, navigate to **Persons** and click on the person who is to leave.
- Open the **Settings** tab and uncheck the Active user box

- You will then receive the following message:

- If you now click OK, all the person's roles will be deleted. (e.g. manager role, personnel role) This ensures that no further applications are assigned to this person.
- If you click on Cancel, these roles will be retained. Please note that this may mean that, for example, holiday requests are not processed because the person with the corresponding role has left.
- If you now click on Save, the person leaving will no longer be able to log in to the Personlwolke.
- After this step, the person will only be charged at the reduced rate.

3. Move to the exit group (Loose group of ex-employees)

- In order to keep the organisation chart up-to-date and clear (and to be able to make evaluations of departures if necessary), the person must be moved to the departure group.
- In the Administration folder, navigate to Persons and click on the person who is to leave.
- Switch to the Groups tab.
- Now select the group "XYZ resignations" under "select an option" and enter the resignation date under "Valid from". If you leave it blank, the current date will be entered. Leave the "Valid to" field empty.

- Now click on Save and the person will be moved to the leaving group with the date entered.

> **W A R N U N G**
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> **Attention**: if you want to delete the affiliation to previous **Loose groups**, please use the "Delete" function (see screenshot below)!
> Please bear in mind that every active employee must be assigned to a hierarchical group. It is not possible to delete such an assignment without reorganising it

Delete employee profile

If the data is no longer required, a person can be deleted (note: this will delete all time recording data):

- In the Administration folder, navigate to Persons and click on the person you want to delete.
- Click on the red **Delete** button

- You will then receive the following pop-up

> W A R N U N G
> **ATTENTION: if you confirm the pop-up with "Delete", the person's data will be irrevocably deleted. This data can no longer be analysed or restored!**

Frequent error case regarding terminations

It can happen that only the "Active user" tick is removed for an employee who has left the company, but the leaving date is not set. This results in the time accounts being calculated continuously, meaning that the

employee still has a target time and, due to their non-attendance, earns minus hours even though they have actually left.

In this case, the leaving date must be entered retrospectively, and the daily payroll run must then be started from the leaving date. As a result, the account calculation is rolled up again and the leaving date is taken into account.

Instructions:

- Enter the leaving date in the "General: Leaving date" parameter in the Settings/ Time recording tab.
- The daily payroll must then be started.
- Go to the menu item "Administration" # "Persons"
- Select the employee.
- In the "Settings" # "Time recording" tab, click on the "Daily payroll" button.
- In the pop-up, enter the day after the leaving date as the date and select the option "Transfer new time models and authorisations from master record".
- If the entries are correct, click on "Start daily payroll"

> **W A R N U N G**
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> Please note that the date on which daily accounting is started must not be before the leaving date, as otherwise information such as the release authorisations (monthly release, 10h / 50h cap cancellation, etc.), daily programmes, holiday entitlement values, etc. will be lost. The existing data is overwritten with the current values.

Example:

- Max Mustermann left the company on 30.04.XXXX
- However, the leaving date 30.4.XXXX is only entered in the person master record on 08.05.XXXX.
- As a result, the time recording for Max Mustermann is still calculated from 1 May to 8 May.
- In order for the period from 1 May to 8 May to be deleted, a daily payroll run must be carried out as at 1 May XXXX

Termination during the month

Monthly releases cannot be sent for approval in advance for departures during the month. These can only be sent on the last day of the month.

The statistics also only show account values from the end of the month. Therefore, if an employee has left during the month, the values for the month in which they left are not displayed in the Personalwolke monthly statistics analyses.

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1. /daisy/personalwolke-admin/9550-dsy.html?language=4