Daily schedule - single view and editing

In principle, there are **two types of daily schedules**:

- Daily schedules used by several clients: no changes to the data are possible here, only viewing
- Daily schedules that are client-specific, i.e., used only by your client. These can usually be edited

The individual tabs of the daily schedule view and editing screen are described below

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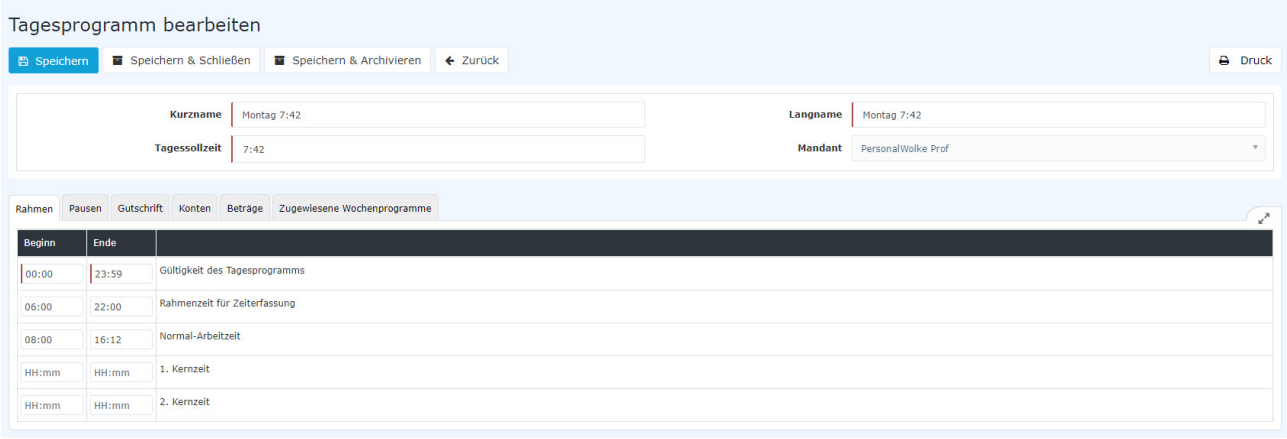
Step 1: Open the daily schedule

You get to an individual daily schedule by clicking the schedule of your choice in the daily schedule overview.

In edit mode, you can edit all settings of a daily schedule that is client-specific.



Step 2: "Frame" tab

2.1 Validity of the daily schedule

- The validity of the daily schedule specifies the times between which it is limited.

Example: A validity of 00:00 to 24:00 indicates that a day is counted from 00:00 to 24:00.
A daily schedule from 06:00 to 05:59 means that extra time and overtime from 00:00 to 05:59 are attributed to the previous day. So if an employee started working at 01:00, they would also be booked out automatically at 05:59.

Note: In the Credit[20] tab - "Credit for missing booking" - you can specify how the program should behave if the employee has not booked out by the end of the validity of the daily schedule (e.g., because the employee forgot to book out).

> NOTIZ
> At the end of the validity of the daily schedule, an employee is **automatically booked out.**

2.2 Frame time for time tracking

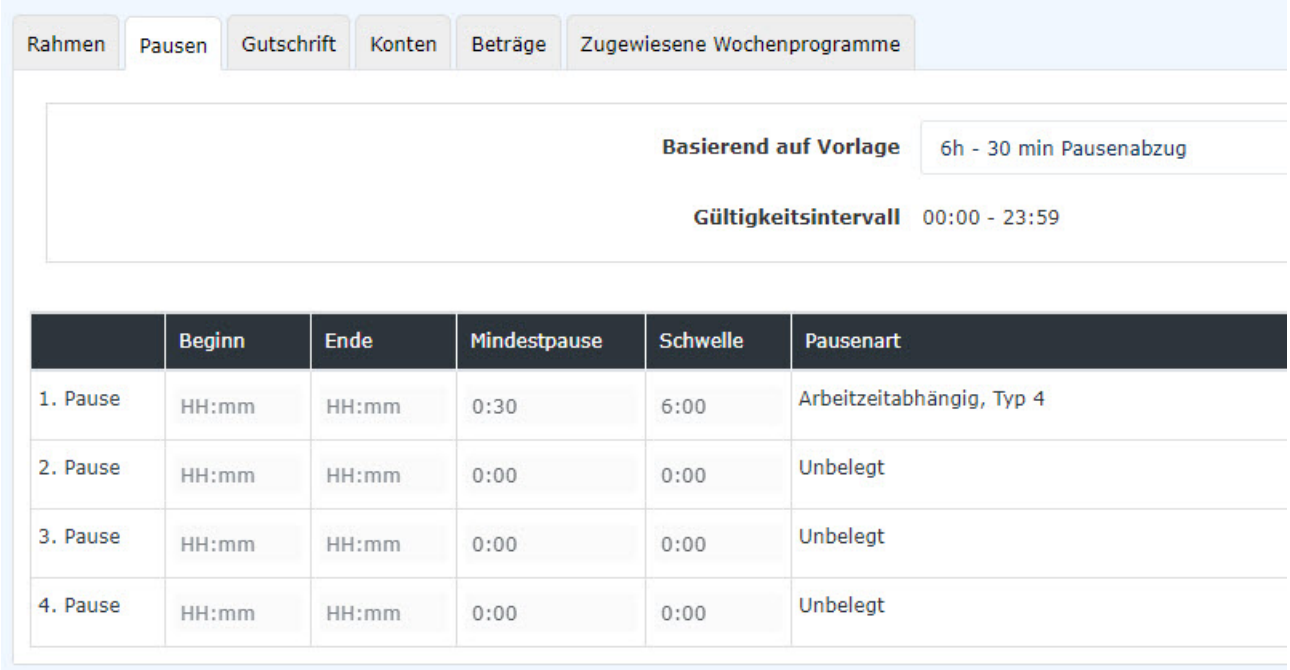
- This time span indicates when the employee's bookings are counted as working time. Times outside the frame are unvalued working time.

> NOTIZ
> **Attention:** If you want to define frame times for your employees, you must activate the parameter "Work outside frame" in Person master record/Settings/Time tracking/Extra hours valuation[21]!

- **Normal working time:** This represents the (fictitious) normal working time according to law = weekly working time/5 plus the statutory break. Absences with certain absence reasons are also valued within this time, see Absence with a non-productive absence reason[22].
  In the image example above, a weekly working time of 38.5 hours divided by 5 days plus a 30-minute break was entered: (38.5/5)+0.5 = 8 h 12 min.
- **1st core time:** If your company has a core working time with mandatory attendance, it can be entered here. If a core time violation occurs, the program signals an irregularity. You can see these in the correction client/monthly journal[23] in the FB and FE columns.
- **2nd core time:** You can store a second core time here if you need one in your company.

Step 3: "Breaks" tab

Here you can select a break template.



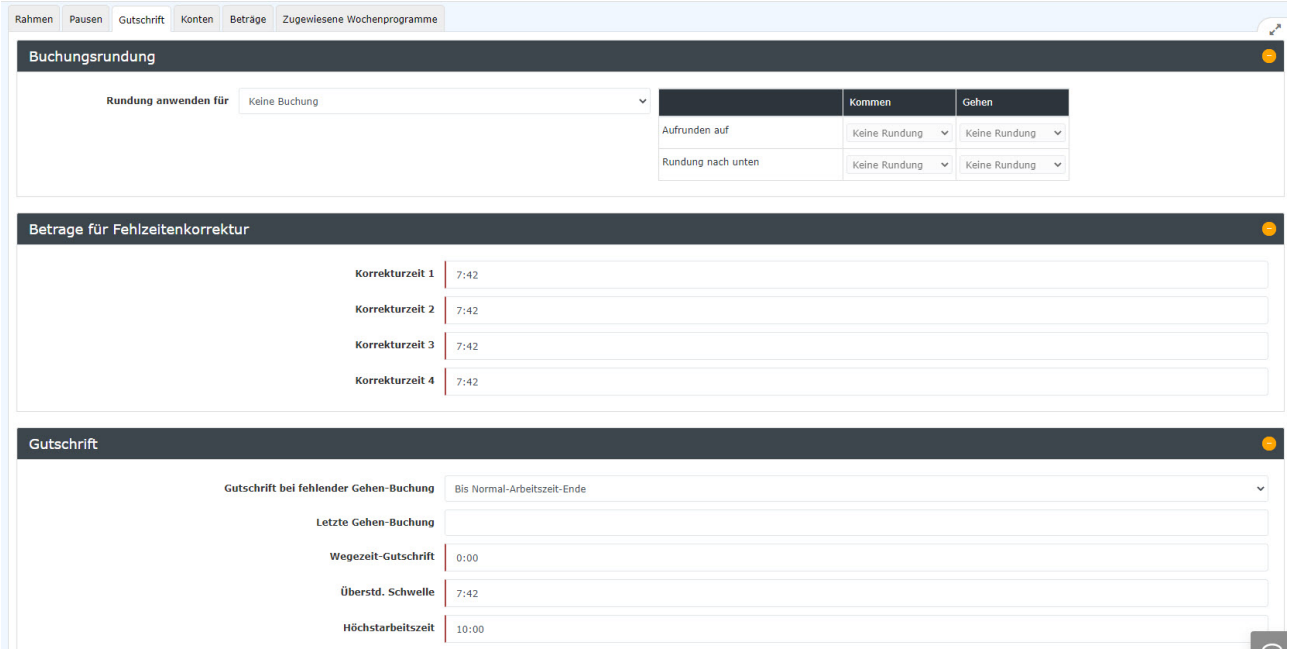
Personalwolke offers numerous templates to choose from here, which let you adapt the rule to your specific working time needs.
Some of them are described here:

- **6h – 30 min break deduction:** This break rule is used by default. It provides that after 6h of work, the next 30 minutes are deducted as a break if the employee does not book out. If the employee takes less than 30 minutes of break, the time missing to reach 30 minutes is deducted automatically.
- **Statutory break deduction Germany**: rule according to German labor law
- **6h - 1h break deduction frame 11-14:** automatic break deduction of 1 hour within the time from 11 a.m. to 2 p.m.

- **6h - 30 min break deduction frame 11-14:** automatic break deduction of 1 hour within the time from 11 a.m. to 2 p.m.
- **8h - 30 min break deduction:** after 8 hours, the next 30 minutes are deducted as a break if an employee has not booked a break.
- **No automatic break deduction:** in this case, there is no break deduction, even if an employee has not booked a break.
- **6h - 30 min break deduction frame 10-15:**
- **6h - 1h break deduction:** if an employee does not book out, 1 hour is deducted as a break after 6 hours of work.

Step 4: "Credit" tab

In the Credit tab you can set the following settings of the daily schedule:



4.1 Booking rounding

> WARNUNG
>
> Attention: we recommend making these entries in consultation with a Personalwolke consultant to avoid contradictory results!

If your company has a rounding rule for working time, it can be documented here. This function is not enabled by default; the setup is done for you by the Personalwolke consultants.

A day's working time is rounded with regard to the clock-in and clock-out times. That is, the exact clock-in and clock-out times are entered in the journal as such. The duration in between is rounded according to the company's rounding rule and also shown rounded in the journal. The actual, calculated attendance time can be read from the difference between the clock-in and clock-out times.

Example:
An employee arrives at 7:48 and leaves at 16:12. The pure attendance time (including breaks) is 8:24, but because of the booking rounding, the journal shows 8:15 as working time for this day (rounding up when clocking in and rounding down when clocking out to the nearest quarter hour).

4.2 Amounts for absence corrections

If an employee is absent for a whole day, for example due to a vacation day, sick leave, or because they are attending a full-day seminar, time must be charged in time tracking for this period according to your company's daily normal working time.
That is, if an employee is absent due to a hospital stay, the absence is credited with the time they would have had to work according to their weekly working time converted to the day, e.g., 7.12 hours.
As a rule, the same hourly rate is credited for every type of absence. Please **therefore enter the daily target working time of your company in all fields of this table!**

If you use different target times depending on the absence reason, please contact the Personalwolke consultants for further information!

4.3 Credit

4.3.1 Credit for missing clock-out booking

Here you can set how the system should behave if the employee has not booked out by the end of the daily schedule.

You have the following setting options here:

- **Until frame time end**: The end of the frame time is used as the last booking
- **Until core time end**: The end of the core time is used as the last booking.
- **Until normal working time end**: The end of the normal working time is used as the last booking.
- **No credit**: The employee's last booking is used as the last booking.
  Example: An employee books in at 12:15 and forgets to book out. The system will then close this booking at 12:15, so that no credit is created. The employee must correct the times afterward using a time correction request. We recommend using this setting!
- **Until clock-out booking from the daily schedule**: The time stored in the setting "Last clock-out booking" is used as the last booking.
- **Completion up to daily target time**: If the employee forgets to book out, the booking is ended at the time at which the employee would have reached the daily target time.

4.3.2 Last clock-out booking

Here you can enter the time to which the setting "Until clock-out time from the daily schedule" of the input field "Credit for missing clock-out booking" refers.

4.3.3 Travel time credit

A travel time credit is credited to the employee every day and, depending on the working time agreement, represents a reimbursement for the travel time to and from the workplace. For example, a travel time credit of 5 means that 5 minutes are credited to the employee per working day.

4.3.4 Overtime threshold

specifies the working time in hours and minutes from which the employee can work overtime. If, for example, 8:00 is entered here, it means that the employee can only be credited with overtime from the 9th hour.

Example:
The overtime threshold is set at 10:00 hours. The daily schedule has a daily target time of 8:00 hours. If the employee works more than 8:00 hours, the time up to the end of the 10th hour is always counted 1:1, even if the employee has a permission for overtime and is in a time frame in which overtime can occur.

4.3.5 Maximum working time

specifies the daily maximum working time valid for this daily schedule. If the maximum working time capping is active in the employee's master record under Settings/Time tracking/Maximum working time, the time is capped to this value here, see the chapter Activating time tracking/Step 5: Maximum working time[24]

Example: Maximum working time = 12:00 and the maximum working time capping is active. The employee's working time that goes beyond 12h on that day moves to the background account "Unvalued hours". A 12h capping thus takes place.

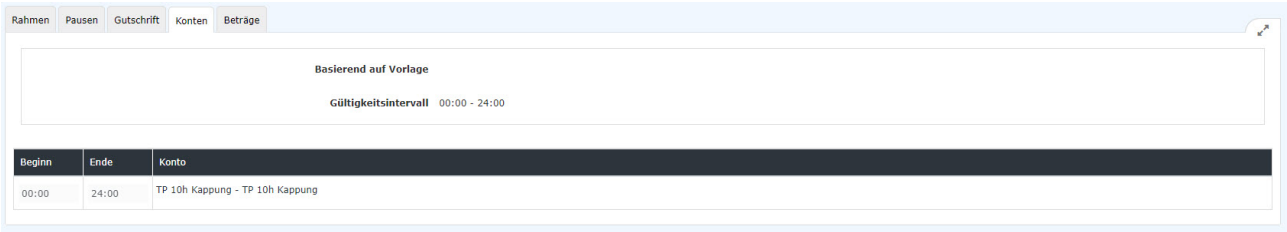
Step 5: "Accounts" tab

NOTIZ

Note: the "Accounts" chapter is currently being revised

Here you can select a template to store overtime in a daily schedule.

Note: If you do not need an overtime calculation, you can skip this point.



You currently have 4 templates available, which you can use and edit. You can, for example, adjust the times in which overtime can be earned.

100% Üstd 00:00 - 06:00, 50% Üstd 06:00 - 22:00, 100% Üstd 22:00 - 24:00

100% Üstd frei 00:00 - 24:00

100% Üstd 00:00 - 06:00, 100% Üstd 20:00 - 24:00

50% Üstd 00:00 - 24:00

- **100% OT 00:00 - 06:00, 50% OT 06:00 – 22:00, 100% OT 22:00 – 24:00**
  This template grants 100% overtime in the period from 00:00 to 06:00 and from 22:00 to 24:00. In the period from 06:00 – 22:00, the daily schedule grants 50% overtime. This overtime is only valued once the overtime threshold (see Credit) is reached.
- **100% OT tax-free 00:00 – 24:00**
  This template grants 100% tax-free overtime in the period from 00:00 – 24:00. This overtime is only valued once the overtime threshold (see Credit) is reached.
- **100% OT 00:00 – 06:00, 100% OT 20:00 – 24:00**
  This template grants 100% overtime in the period from 00:00 to 06:00 and from 22:00 to 24:00. This overtime is only valued once the overtime threshold (see Credit) is reached.
- **50% OT 00:00 -24:00**
  This template grants 50% overtime in the period from 00:00 to 24:00. This overtime is only valued once the overtime threshold (see Credit) is reached.

Example "Adjusting accounts":
Requirement: You need an overtime calculation with the following rules:

- 100% OT from 00:00 – 06:00

- 50% OT from 19:00 – 20:00
- 100% OT from 20:00 – 24:00

For this setup, it is best to use the template "100% OT 00:00 - 06:00, 50% OT 06:00 – 22:00, 100% OT 22:00 – 24:00"
and adapt it as follows:

- First, delete the "Account TP 50% p. Vor" by clicking

  .

  This account is no longer needed.
- Next, adjust the start and end of the accounts.

If you then save, you have successfully made the change for the daily schedule.

Account names
Depending on the template, there are the following accounts:

- TP 10h capping: If this account is stored in a daily schedule, the daily schedule has a 10 or 12 hour capping. For it to take effect, however, it must be activated for the employee.
- TP 50% p. Vor: This account specifies the period in which 50% mandatory overtime can accrue. "Vor" (before) stands here for the period before normal working time and should be used as such.

Example: Start 06:00 and end 08:00 are stored with "TP 50% p. Vor". The overtime threshold is 0. If the employee works from 07:00 to 09:00 that day, they receive 1 hour of 50% mandatory overtime, provided that overtime calculation has been activated for the employee or they received the overtime permission for the day through the correction client.

- TP 50% p. Nach: This account specifies the period in which 50% mandatory overtime can accrue. "Nach" (after) stands here for the period after normal working time and should be used as such.

Example: Start 08:00 and end 22:00 are stored with "TP 50% p. Nach". The overtime threshold is 8. If the employee works from 08:00 to 18:30 that day, they receive 2 hours of 50% mandatory overtime for the time from 16:30 to 18:30, provided that overtime calculation has been activated for the employee or they received the overtime permission for the day through the correction client.

- TP 100% p. Vor: This account specifies the period in which 100% mandatory overtime can accrue. "Vor" (before) stands here for the period before normal working time and should be used as such.

Example: Start 00:00 and end 06:00 are stored with "TP 100% p. Vor". The overtime threshold is 0. If the employee works from 05:00 to 07:00 that day, they receive 1 hour of 100% mandatory overtime, provided that overtime calculation has been activated for the employee or they received the overtime permission for the day through the correction client.

- TP 100% p. Nach: This account specifies the period in which 100% mandatory overtime can accrue. "Nach" (after) stands here for the period after normal working time and should be used as such.

Example: Start 22:00 and end 24:00 are stored with "TP 100% p. Nach". The overtime threshold is 0. If the employee works from 21:00 to 23:00 that day, they receive 1 hour of 100% mandatory overtime, provided that overtime calculation has been activated for the employee or they received the overtime permission for the day through the correction client.

- TP 100% f. Nach: This account specifies the period in which 100% tax-free overtime accrues.

Example: Start 00:00 and end 24:00 are stored with "TP 100% f. Nach". The overtime threshold is 0. If the employee works from 07:00 to 09:00 that day, they receive 2 hours of 100% tax-free overtime, provided that overtime calculation has been activated for the employee or they received the overtime permission for the day through the correction client.

Step 6: "Amounts" tab[25]

Amounts for daily calculation functions

Enter (hourly) values here that influence how the actual time, or the work performed beyond the target time, is treated.

- **reserv. SPA 85**: The minimum duration for the lunch break can be entered here. The second field is for any further break booking
- **OT thr. 100%**: Once the time entered here is exceeded, 100% overtime is calculated
- **Credit Christmas**: Time credit if December 24 cannot be taken as a day off
- **Credit New Year's Eve**: Time credit if December 31 cannot be taken as a day off
- **NAZ > 50% mand. OT**: working time performed beyond the value in this field is attributed to the 50% overtime pot
- **Break credit/savings pot**: (credit = Gutschrift): a time can be entered here that is attributed to making up bridge days, for example. If it says, for example, 0.30, then 30 minutes of the working time that exceeds the normal working time or the daily target are credited each working day to a special pot, which then benefits the taking of time off in lieu, e.g., on a bridge day. If you take time off in lieu on such a day, there is a separate absence reason that triggers booking against this "savings pot".
- **Municipalities: Kindergarten preparation hours**: Automatically increases the daily target time by this value so that it no longer has to be booked manually. Example: A weekly allowance of 3.5 hours of preparation time results in a daily share of 42 minutes in a five-day week.
- **Diff. full-time**: for part-time employees, this specifies how work performed beyond the part-time target time is to be settled. If a value of, e.g., 2.00 is entered here, then over an averaging period 20% overtime is booked for time worked up to these 2 hours, and 50% overtime above that.
- **OT thr. 200**: 200% overtime is paid out for everything performed beyond the amount entered here.

Daily schedule information fields:

The parameters that can be selected here define in detail how various time data is to be treated.

- **TP Xmas/New Year's Eve**: here you can specify whether the daily schedule created is one for the special case of December 24 and 31, which can be valued differently depending on the collective agreement and works agreement.
- **paid break**: this specifies how break times are to be counted in time tracking if they count as part of working time. (Note: "max. break credit 100p" stands for "maximum break credit of 100%, taxable") It is also possible to charge a penalty break if a user forgets to book out for a legally required break.
- **Weekly hrs 50% -> balance**: If the planned weekly working time of 40 weekly hours is not reached, the configured overtime is automatically transferred to the balance. Some collective agreements provide for this. If nothing is entered here, this is not done.
- **PT core time viol. d**: This stands for "Part-time: deactivate core time violation". If "Yes" is selected here, core time violations by part-time employees are not listed in reports and the like.
- **Rounding**: Here you can define the rounding of minute-exact overtime according to certain specifications.
- **Client** *[Note: name will be changed]:* This field is used to define how to handle overtime/extra hours of part-time employees.
- **Break credit/savings pot**: Here you set how to handle the time amount entered in the left column "Amounts for daily calculation functions" in the field labeled "Break credit/savings pot".
- **Valuation of 11th/12th hour**: This field specifies how an actual time of more than 10 hours is to be settled, e.g., flextime or payout
- **unassigned** *[Note: name will be changed]*: This field stands for the extra hours valuation

WARNUNG

If you did not already define the settings of daily schedules with our consulting team when starting with Personalwolke, we recommend contacting our support team if you want to use this configuration for the first time!

Step 7: "Assigned weekly schedules" tab

NOTIZ

Note: this tab is only visible for daily schedules that you can edit, i.e., those created specifically for your client.

Here you can see the weekly schedules in which the respective daily schedule is used.

Clicking the edit icon (marked in red in the view above) takes you to the edit view of that weekly schedule.

Checking the **checkbox "Detailed display of the selected time models (daily schedules)"** expands a table with further details.
This is useful when a weekly schedule is composed of several daily schedules.

NOTIZ

Attention! Here you can only change the daily schedules used for the respective day of the week, not the general conditions of the daily schedule itself. If you want to do that, please return to the "Frame[26]" tab!

Step 8: "Decentralized absence reason bookings" tab

This tab has been available since 08/01/2024.

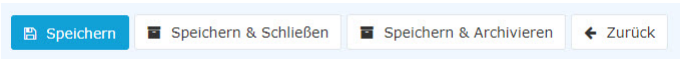
NOTIZ

The data can only be edited if the daily schedule was created by you.

By entering times and the associated decentralized absence reasons, you can restrict at which times an absence reason booking can be made at one of the Interflex terminals.
For example, you can specify that booking out for a doctor's visit is only possible daily between 08:00 and 16:00.
The fields "Decentralized bookings 1 - 4" are assigned to specific absence reasons at the terminal, e.g., doctor's visit, which are also visible to users. Changing the name of the text blocks in the daily schedule screen is not possible per se.

Step 9: Save a daily schedule

The following options are available for the daily schedule:



If you change and save a daily schedule that has already been assigned to employees, you have two options:

- **Copy**
  copies the daily schedule 1:1 and creates a new one. This can then be used in the weekly schedule instead of the old daily schedule. The effect is a clear separation from the previous daily schedule

- **Save and re-run daily settlement**
  saves the changes and recalculates the time tracking of all employees who have this daily schedule, back to the day on which this daily schedule first ran.

> WARNUNG
>
> ATTENTION: Since this recalculates retroactively, values in the past may change!
> If you do not want this, be sure to use the "Copy" option!

If the daily schedule has not yet been assigned to any employee, the daily schedule is simply saved.

With **Save & Archive** you can remove daily schedules that are no longer needed from the list of daily schedules.

1. /daisy/personalwolke-admin/8607-dsy.html?language=4
2. /daisy/personalwolke-admin/9052-dsy.html?language=4
3. /daisy/personalwolke-admin/5872-dsy.html?language=4
4. /daisy/personalwolke-admin/9403-dsy.html?language=4