Creating persons in the future & past

Often, new employees are not created in the system exactly on their start date. For this reason, Personalwolke Time supports different scenarios for recording a new person in the system

- retroactively[1] or
- in the future [2]

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In our system, person master records have a "Valid from" and a "Valid until" date. When a new person is created, these data are filled in automatically and cannot be changed manually. When creating a new person, it is also possible to activate time tracking[3].

To enable time tracking in the past for retroactively created persons, the field "Start of time tracking" must be set to a date in the past, see Activating time tracking retroactively[4].

Relevant parameters

The following values must be entered in the **tab "Settings/Time tracking"** in the person master record (person screen).

Start of time tracking[5]

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When you check the checkbox **"Activate time tracking"** in the **tab "Settings/Time tracking"** , you must be sure to enter the start date of time tracking correctly. The start date of time tracking must be set to a day BEFORE the day from which times are to be recorded in the system!

The "Start of time tracking" date must be in the past, i.e. at least the day before the day of entry.
If you enter the current date, the date is automatically corrected to the previous day.

Using a past date makes it possible to enter vacation entitlements and other values, so that a person newly joining the company has all the necessary time tracking values available in the system as of the start date.

Example:

- Start date: as of 01.01.
- Person is created in Personalwolke on 08.01.
- The start date of time management must be set to 31.12. so that times can be recorded from 01.01.

Start date

When creating a person, the start date must be specified. It can then be shown in various evaluations.

Fictitious start date

The fictitious start date is needed for crediting prior service periods and for taking vacation years from these prior service periods into account. If the collective agreement provides for a tiered vacation entitlement based on (prior) years of service, this entitlement can be taken into account by entering the fictitious start date.

Example:

- Start date: as of 01.07.

- creditable prior service: 6 months
- Fictitious start date: 01.01.

Examples of creating persons

Example 1: The employee is already with the company and is created retroactively in time tracking:

1. Time tracking is activated as of a start date in the past. The bookings must then be entered retroactively, see Activating time tracking retroactively[6].
2. Time tracking is activated as of the current point in time. Afterward, the balance values and vacation data (described below) must be updated manually via the Correction-Client (found under **Administration / Time management / Correction-Client**).
   See Activating time tracking[7]

Example 2: An employee newly joins the company:

1. **The employee can be created in Personalwolke in advance and only activated for time tracking on the start date.**
   Example: Start date: 01.04.
   The employee is created as of 25.03. so that the information already exists and Personalwolke can be used in full as of the start date.
   Then, on 01.04., time tracking still has to be activated as of 31.03.
2. **The employee can be created on the start day and time tracking can be activated as of the previous day.**
   Example: Start date: 01.04.
   The employee is created in the system on 01.04. and the start date of time management is set to 31.03.
   This allows the employee to record their working times and absences from 01.04.

Vacation entitlement

For newly joined employees, the vacation entitlement must be specified, as well as the "reference date for adding", so that the new vacation entitlement is added on the adding date. If the new annual vacation is credited per calendar year, you must enter 01.01 as the reference date for adding. If the start date is relevant, the start date must be entered here.

If you create in Personalwolke an employee who is already with the company, you must additionally enter the days since the last adding and, if applicable, the entitlement from the previous year and the year before that. These are entered in the Correction-Client under **Administration / Time management / Correction-Client**. There, the view must be switched to the daily view and the correct values entered on the first day in time tracking.

Example:

If Max Mustermann joined on 01.01.2019 and is then created in time tracking on 01.04.2020, the vacation values must be stored as follows:

- Vacation entitlement: 25
- Adding date: 01.01.2019
- Days since last adding: 31 (January) + 29 (February 2020, leap year)+ 30 (March) + 1 (current day) = 91 days
- Vacation used in 2019: 8 days
- Vacation used in 2020: 7 days
- Remaining vacation previous year: 10 days

- Remaining vacation total: 35 days (10 remaining days from 2019 + 25 days from 01.01.2020; vacation days are always deducted from the oldest remaining vacation first until it is used up)

Aliquoting of the year of joining

The parameter "Aliquoting of the year of joining" controls whether the vacation entitlement is to be added on an aliquot basis in the first six months, and must be set to "statutory" for this.

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> Caution: If the employee is created retroactively in time tracking and the start date is not in the current year, set this parameter to "No".

Example:

- Mr. Mustermann joined on 06.03.2019.
- Mr. Mustermann's company has been set up in Personalwolke since 01.01.2020.
- Time tracking is therefore activated for Mr. Mustermann as of 31.12.2019.
- If aliquoting of the year of joining is activated, his vacation entitlement in 2020 is added on an aliquot basis.
- As a result, he would not receive the defined 25 vacation days on 06.03.2020.
- In this case, the parameter "Aliquoting of the year of joining" must be set to "No".

1. /daisy/webdesk-manual-admin/9408-dsy.html?language=4
2. /daisy/webdesk-manual-admin/9403-dsy.html?language=4
3. /daisy/webdesk-manual-admin/9403-dsy.html?language=4
4. /daisy/webdesk-manual-admin/9408-dsy.html?language=4
5. /daisy/webdesk-manual-admin/9852-dsy.html?language=4
6. /daisy/webdesk-manual-admin/9408-dsy.html?language=4
7. /daisy/webdesk-manual-admin/9403-dsy.html?language=4