Activating Time Tracking Retroactively

Overview

Before you begin with the settings, you should answer the following questions:

- Have you already completed the general setup of the employee?
  - No: Continue here: Creating a New Person[1]
- Has the employee not yet joined the company?
  - Yes: Continue here: Activating an Employee's Time Tracking[2]

If you can also answer the last question with yes, you will find the step-by-step instructions for retroactively activating time tracking below:

- Step 1: Start of time tracking, weekly schedule, and hire date[3]
- Step 2: Master record settings[4]
- Step 3: Save and recalculate[5]

Step 1: Start of time tracking, weekly schedule, and hire date

Open the "Settings" tab in the person form and select the item Time tracking from the dropdown list on the left below the "Master data" tab.

- **Start of time tracking** Set this parameter to the day **BEFORE** the hire date. Example: If the hire date is 01/01/2023, the start of time tracking is 12/31/2022.
- **Weekly schedule** Select the weekly schedule with which the employee should start. The weekly schedule must be created before the employee is set up. If this is not the case, click on Creating Weekly Schedules[6]. You will return later via the menu item Administration - Persons.

NOTIZ

NOTE: The part-time factor should normally be left at 100%. Part-time work is represented by weekly schedules.

- **Hire date** The employee's hire date must be entered under General.

Step 2: Master record settings

The further master record settings can vary greatly.

It is recommended to open an existing employee with the same or similar settings (full-time, part-time, flat-rate employee, all-in, manager without active time tracking, etc.) in a new tab.

To open a new tab, go to the menu item Administration and click on the white icon to the right of Persons.

Compare the settings of the existing employee with those of the employee you have just created and adopt them.

If different settings are needed or there is no suitable template, you will find a detailed description of the individual areas here:

- Extra Hours & Extra Hours Evaluation[7]
- Negative Time Tracking[8]

- Flat-Rate Employees: Absence Principle[9]
- Flat-Rate Employees & Overtime Flat Rates[10]
- Balance Offsetting[11]
- Part-Time[12]
- Vacation Accounting[13]

- [14]



Enlarge[15]

You will find details on the settings in the following PDF: Master Record Field Description[16] (application/pdf, 1.7 MB, Info[17])

Step 3: Save and recalculate

Once you have entered all settings, scroll up and click the **blue "Save" button.**

To the right of the "Start of time tracking" field you will find the button "**Recalculate**" - please click it! The recalculation also covers the previous period between the hire date and the activation of time tracking.

A new input form opens:

- For the From date, enter the day before the hire date (see above: start of time tracking).
- The "Mode" parameter does not need to be changed.
- Click the "Recalculate" button.

All settings are applied retroactively up to the hire date, and you have now finished setting up the time tracking settings!

1. /daisy/webdesk-manual-admin/9835-dsy.html?language=4
2. /daisy/webdesk-manual-admin/9403-dsy.html?language=4
3. /daisy/webdesk-manual-admin/8996-dsy.html?language=4
4. /daisy/webdesk-manual-admin/8607-dsy.html?language=4
5. /daisy/webdesk-manual-admin/8608-dsy.html?language=4
6. /daisy/webdesk-manual-admin/8609-dsy.html?language=4
7. /daisy/webdesk-manual-admin/8610-dsy.html?language=4
8. /daisy/webdesk-manual-admin/8614-dsy.html?language=4
9. /daisy/webdesk-manual-admin/8615-dsy.html?language=4
10. /daisy/webdesk-manual-admin/8616-dsy.html?language=4
11. /daisy/webdesk-manual-admin/8247-dsy.html?language=4
12. /daisy/webdesk-manual-admin/8247-dsy.html?language=4
13. /daisy/webdesk-manual-admin/7332-dsy.html?language=4
14. /daisy/webdesk-manual-admin/7332-dsy.html?language=4