

Chronologic Workforce Management System – Leavers Procedure

This document describes how best to carry out the leavers procedure to ensure that historical reports remain accurate.

You can archive employees but then the data pertaining to them is separated out from the main database and is NOT included in the reports.

1.1 Prerequisites

To carry out this procedure you must have at least one Leavers group defined in System/System Setup/Groups.

If you have multiple sites or locations and you want to keep the leavers associated with those sites or locations then create more than one group and including the site or location name is each. Ensure only full administrators have access to the Leavers group to prevent its unauthorised use.

1.2 Leavers Procedure

Leaving Date

Set the last day of their employment as the leaving date on the Dates tab of the employee screen. This will stop any unauthorised absences showing on their Timesheets.

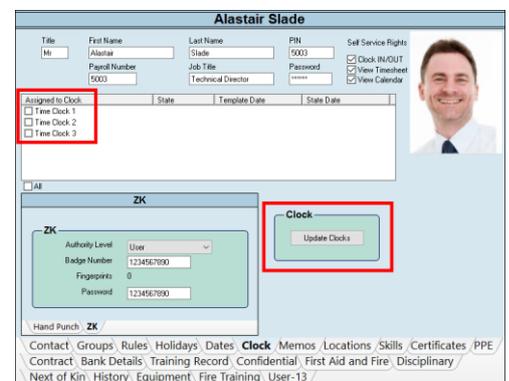
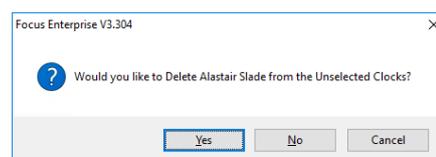
IMPORTANT: Do not do anything else until you have paid that employee for the last time.



Template Management

On the Clock tab untick the clocks to show that you want to remove the templates from those clocking terminals. Use the All tick box for speed if you have lots of clocks.

Then click on Update Clocks and Yes, to remove the templates from the clocking terminals.



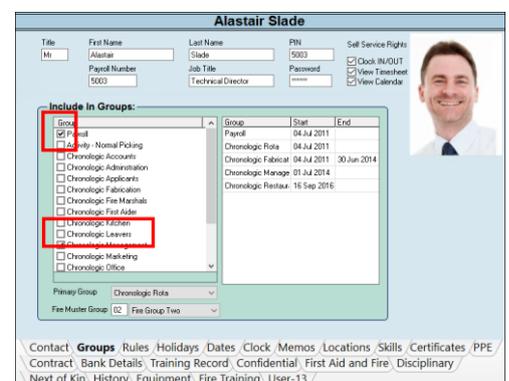
Group Management

Once the employee has been paid for the last time use the Groups tab of the employee screen to move the employees out of the groups there were in on the date they left and into appropriate Leavers group.

Move an employee out of a group by unticking the box on the left hand side of the screen. You can then edit the date in the End box on the right if you need to.

To put the employee in the Leavers group tick the box next to the correct group on the left. (You can do this on the day they leave if you have enough groups available to do that.)

Data between the start and end dates of the Groups listed will now be included in the historical reports on those Groups.



Employee Self Service

Delete the PIN and Password used by the employee to access the Employee Self Service screens. This will remove them from the licence so that you can add another employee to the Self Service Option.

Version Control

1.1

Added note on Employee Self Service PIN and Password deletion.