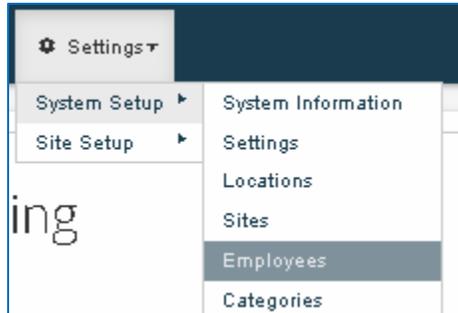


## Recommendations for Adjusting Employee Records

When the employee is no longer with the Company

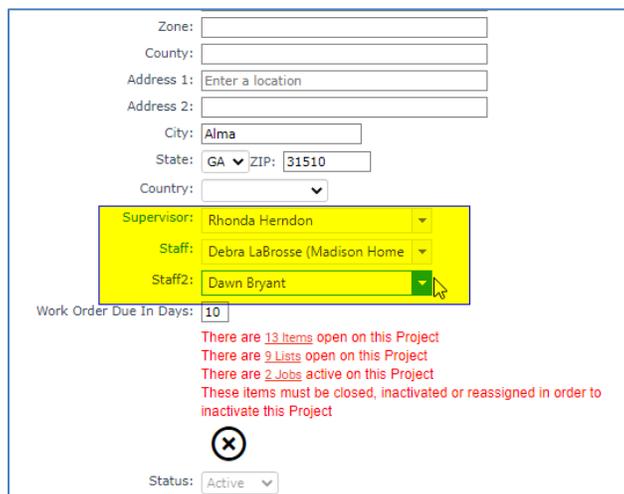
1. Go to the Employee record:  
From the blue menu bar, select Settings > System Setup → Employees



2. Select the employee Full Name to open the Employee Detail page
3. Put an X\_ in front of the Employees first name
4. **Leave the employee Status as “Active”**
5. Remove their email address
6. Remove their username
7. Uncheck ‘Allow PLM.Net access’
8. Uncheck ‘Allow PLM.Mobile access’
9. **Save** these changes by selecting the black disk icon at the bottom of the page.

*Note: We suggest you wait approximately 6 months to a year before making the employee record ‘inactive’ so that all records with which the employee may have been associated have had time to move completely through the system and be closed out. You can assign yourself a Task as a reminder to do this when the time is appropriate.*

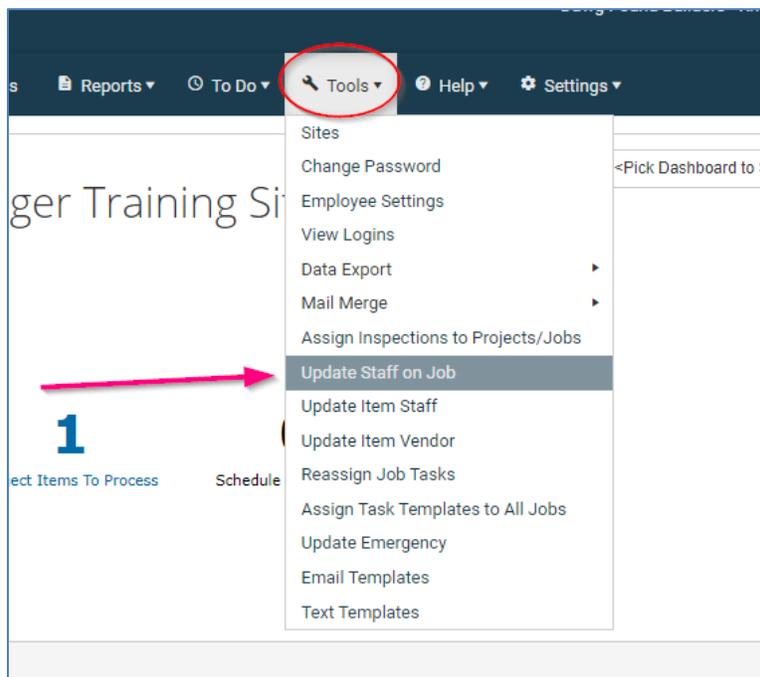
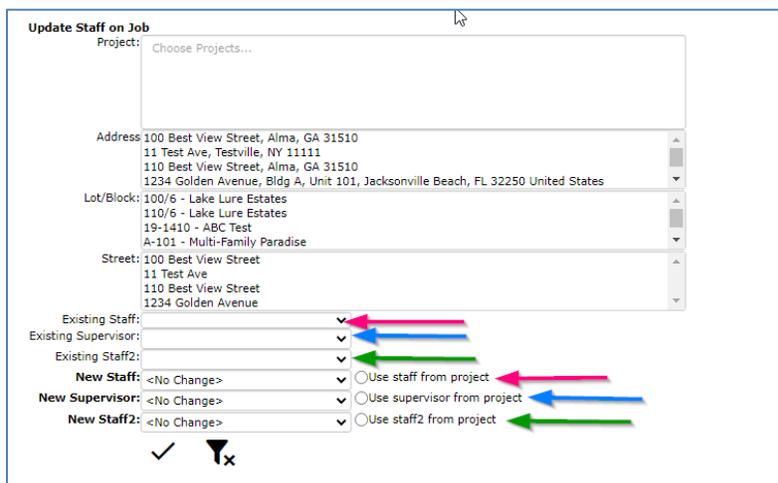
10. If the employee was assigned as the Supervisor/Staff/Staff 2 on any Projects, those Projects **must** be reassigned to another employee.



## Recommendations for Adjusting Employee Records

When the employee is no longer with the Company

11. After reassigning the appropriate Projects, you will need to reassign active jobs to the newly assigned Supervisor/Staff/Staff2. From the blue menu bar, hover over the **Tools** option and **select Update Staff on Job**. Select the appropriate Projects and/or any other criteria shown, as or if needed. Proceed to the bottom of the page and select the former Employee from the drop down menu as the Existing Staff, Supervisor, or Staff 2, then select the new Employee assignment from the drop down menu (or simply select the “Use Staff/Supervisor/Staff2 from project” option). Click the checkmark icon to **save** the record. You will receive a popup advising how many records were updated.

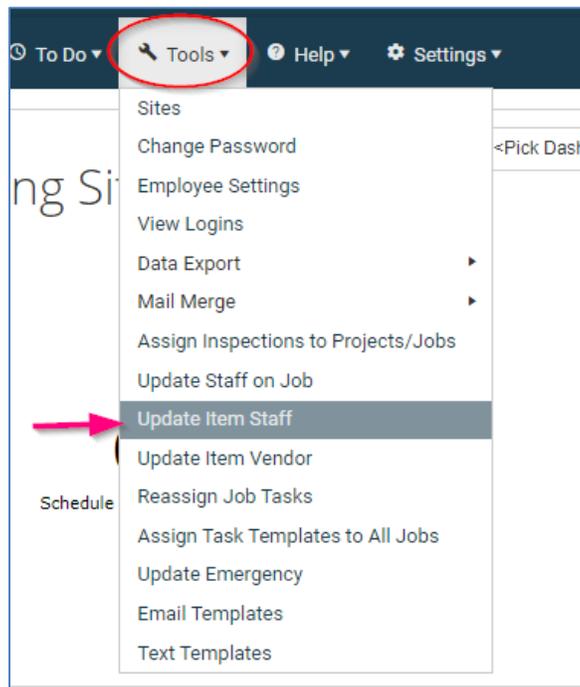
The screenshot shows the 'Update Staff on Job' form. The form includes several dropdown menus and text input fields. The 'Project' field is set to 'Choose Projects...'. The 'Address' field contains a list of addresses: '100 Best View Street, Alma, GA 31510', '11 Test Ave, Testville, NY 11111', '110 Best View Street, Alma, GA 31510', and '1234 Golden Avenue, Bldg A, Unit 101, Jacksonville Beach, FL 32250 United States'. The 'Lot/Block' field contains a list of lot/block numbers: '100/6 - Lake Lure Estates', '110/6 - Lake Lure Estates', '19-1410 - ABC Test', and 'A-101 - Multi-Family Paradise'. The 'Street' field contains a list of street names: '100 Best View Street', '11 Test Ave', '110 Best View Street', and '1234 Golden Avenue'. Below these fields are four dropdown menus: 'Existing Staff:', 'Existing Supervisor:', 'Existing Staff2:', and 'New Staff:'. Each dropdown menu has a red arrow pointing to it. Below the 'New Staff:' dropdown menu are three radio button options: 'Use staff from project', 'Use supervisor from project', and 'Use staff2 from project'. Each radio button has a red arrow pointing to it. At the bottom of the form are a checkmark icon and a close icon (an 'x' in a triangle).

## Recommendations for Adjusting Employee Records

When the employee is no longer with the Company

12. To update the Staff\* assigned to Items hover over Tools→ Update Item Staff. Select the appropriate criteria and proceed to the bottom of the page to reassign from the existing (former) staff to the new staff (or simply select the “Use staff from job” option). Click the checkmark icon to save the record. You will receive a popup advising how many records were updated.

*\*Please note that this tool applies only to employees assigned to the Job as “Staff” and applies to neither the “Supervisor” nor the “Staff2” fields.*



**Update Item Staff**

Project:

Address:   
 11 Test Ave, Testville, NY 11111  
 110 Best View Street, Alma, GA 31510  
 1234 Golden Avenue, Bldg A, Unit 101, Jacksonville Beach, FL 32250 United States

Lot/Block:   
 110/6 - Lake Lure Estates  
 19-1410 - ABC Test  
 A-101 - Multi-Family Paradise

Street:   
 11 Test Ave  
 110 Best View Street  
 1234 Golden Avenue

List Number:

Existing Staff:

New Staff:   Use staff from job

Items:  Open  Closed  All