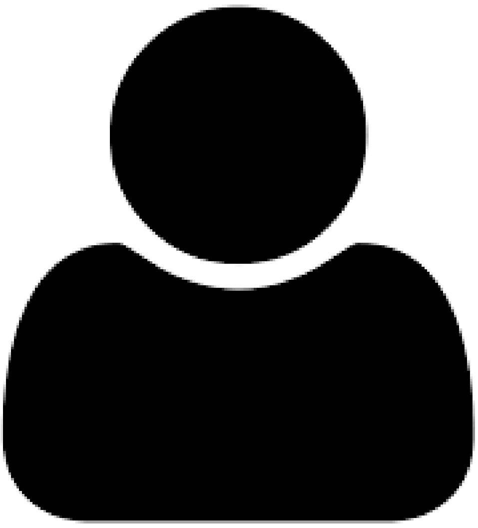
Person administration

General Information



The **person administration** includes **all employees of the company** who have been created in the system. Persons in the system do not necessarily have to be users of the Webdesk employee portal - however, every person who is to be evaluable via the authorisation structures of the Webdesk must exist as a **master record** in Webdesk EWP:

- Name (First- and lastname)
- Personnel number
- Assignment to client and hierarchical organisational unit

If the person is also to be an active user of the **Webdesk EWP portal**, a **user name** (for logging in) and an **e-mail address** (for receiving electronic messages) are also required.
Depending on requirements, all **active** employees can be managed here, as well as employees who **have left** the organisation.

All **personal master data**, such as user name, master record number, personnel number, which group the employee is assigned to, which roles he/she has, which action permissions he/she has and also who is responsible for this employee, is recorded and managed in the **person administration**. Password management is also possible here.

The personal master data fulfils the **following functions**:

- They enable the employee to be categorised in the company structure
- They grant the employee access to the Webdesk portal (access to Webdesk is only possible for active users)
- The employee's data can be analysed (employees who have left the company can also be taken into account here)

In order to use the various webdesk functions, the person can now receive **action permissions**. These permissions can be assigned directly to the **person** or indirectly via an associated **group**, an associated **role**, the assigned **client** or **generally** to all persons in the system. The personal **menu** of the Webdesk EWP user interface is then created from the sum of a person's action permissions.

Furthermore, a person can also be the **holder** and **competence target** of a role. This means, for example, that a person can be the holder of the role "Supervisor", but also in the competence area of another role

"Supervisor". This allows **complex competence assignments** to be mapped, which can be used both for reports and for workflow roles.

Active/non-active employees

For employees in Webdesk, a distinction can be made between **active** and **non-active** users. Active users are all employees with access to Webdesk EWP who can be fully evaluated.

Non-active users do not have access to Webdesk EWP, but their data can still be fully evaluated and reported. These can be employees who work in a factory hall, for example, and therefore do not have a fixed workstation or PC. However, time recording is fully usable by means of a chip and terminal, and organization and various corrections can be carried out by a higher-level person (e.g. shift, team or plant manager, etc.).

Employees are marked as **active or non-active user** in the **personal master data** sheet.

New entrants/leavers

New employees can be created either by synchronization via an i**nterface or directly** in Webdesk EWP.

When a new employee is created, a license check mechanism checks the **availability of licenses** in the background. If the available Webdesk EWP licenses are exceeded, a corresponding message is issued and the person creation fails. New employees can be marked as active or inactive when they are created.

The following options are available for **employees who have left** the company:

- **Employees are deleted directly in Webdesk EWP**
  This frees up a Webdesk user license, but all Webdesk data is lost, which means that no active selection is possible in the evaluations.
- **Employee is marked as a non-active user**
  The non-active status releases a webdesk user license, but an evaluation license must be issued. The non-active employee remains evaluable in their former group, but can no longer actively access the Webdesk.
- **Employee is moved to an exit group**
  If an employee who has left the company is moved to an exit group, their status should be set to “not active”. The advantage of this procedure, in addition to freeing up a user license, is that the resigned employee no longer appears in their original group and the resignation can still be evaluated if the group is deleted.

> NOTIZ
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> **Legislation** requires **collected company data** to be retained for a **certain period of time -** therefore **options 2 and 3 are recommended** when an employee leaves the company.

Felder

Name	Wert
Modul	Portal & Organisation (po)
Webdesk Actionname	po_showPersons.act
Artefakt-Typ	Action