Roles

General

A **role** describes a specific **function** within a company (superior, personnel).

A role in the Personalwolke essentially serves 2 functions:

- On the one hand, access authorizations for individual program functions are realized using roles.
- On the other hand, they fulfil certain functions in the workflow flow (for example Supervisor: Approval of leave requests, personnel: Views of sick leave notifications)

In the Personalwolke there are 2 predefined roles that can be assigned to individual persons or groups:

- **Manager**
  As the name suggests, this role is used to grant a person or group certain extended rights to approve or reject requests made by employees (vacation, doctor, time compensation, etc.).
- **Personnel**
  This role helps you evaluate employees. Various evaluations can be created for different topics (accounts, sick days, holidays, statistics, attendance, etc.).

You **assign the role** either using the role itself, the person master data sheet[1], or a group[2].

The role also performs certain functions during the process flow (requests). Here, the role holder can set defined activities, such as approving, rejecting, or viewing a request (see open tasks[3]).

In contrast to organizational structures (groups, loose groups), a role **cannot be evaluated**. This means that no information functions of a role can be taken into account when information is queried. To make this possible, the role holders would have to be combined in a loose group (for example, a loose group of superiors to which all holders of the role managers are added).

Competence target

A **competence target** is defined as a person or group for which the role holder is responsible or which may be inspected.

Here there are 3 possibilities: certain PERSON(s), certain GROUP(s) or CLIENT. A simultaneous assignment of several competence goals is possible.
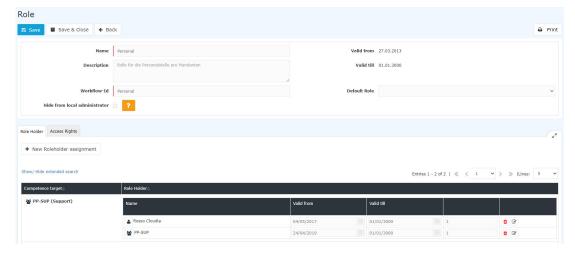
Assignment of a role to a person

You can assign a role to an employee by choosing **Roles** in the menu.

To assign a role, simply click on the edit icon. In the following overview, you will find a list of the competence goals and roleholders of the selected role.

In this example, it can be seen that the PB-SUP group performs the role of personnel for the person Honig Helga, i.e. all persons assigned to the PB-SUP group perform the role of personnel for the person Honig Helga. In addition, one sees that the person Gschaftig Gunter takes over the role personnel for the entire enterprise (client) Personalwolke Base.

With a click on **New Role Holder,** the selected role can be assigned to new persons / groups.

- **Competence target** refers to the person / group for which the employee is to be responsible. In addition, it is also possible to select a client, whereby client refers to the entire company.
- **The role holder** can be a person or a group.
- **Valid from / Valid to** describes the period in which the employee is assigned the selected role.
- **The order** determines the deputy (order 1 = superior, 2 = deputy, 3,4 = if several persons are defined as deputies, the system determines who receives an application for processing).

Practical functions

- When assigning a new role to a person/group/client, there is also the option of using an AutoComplete function. This function is activated by starting to type in an empty text field where, depending on the selected competence target / roleholders, corresponding options are displayed or, if only one option exists, it is selected immediately.
- We select competence target "Group" and enter "PP-" in the newly appearing text field. While you are still typing, a list of options appears from which you can choose. The arrow keys can be used to scroll through the list of results or to select a suggestion with the mouse.
- We select the person as the role holder and type "Ren" in the input field. Since there is only one employee whose name begins with "Ren", the AutoComplete function immediately writes the entire name into the field.

A click on Save stores the settings.

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Webdesk Actionname	showRoles

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1. /daisy/personalwolke-admin/5946-dsy.html?language=4
2. /daisy/personalwolke-admin/5998-dsy.html?language=4
3. /daisy/personalwolke-admin/5877-dsy.html?language=4