

# Roles

## General

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

A role in the personnel cloud essentially serves 2 functions:

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

In the personnel cloud 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](#)<sup>1</sup>, or a [group](#)<sup>2</sup>.

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](#)<sup>3</sup>).

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.

Name	Description	Workflow-Id	Default Role	Client
Personal	Rolle für die Personalstelle pro Mandanten	Personal	All	All

To assign a role simply click on the edit

icon 

In the following overview you will find a list of the competence goals and role owners of the selected role.

Role configuration page showing details for a role named 'Personal'. The role is valid from 27.03.2013 to 01.01.3000. The description is 'Rolle für die Personalstelle pro Mandanten'. The workflow ID is 'Personal'. The role holder section shows two assignments for the competence target 'PP-SUP (Support)': one for 'Rosso Claudia' (valid from 04/05/2017 to 01/01/3000, order 1) and one for 'PP-SUP' (valid from 24/04/2019 to 01/01/3000, order 1).

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 Gschäftig Gunter takes over the role personnel for the entire enterprise (client) personnel cloud Base.

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

'New Roleholder assignment' dialog box. The 'Competence target' is set to 'Group' and the 'Role Holder' is set to 'Person'. The 'Valid from' field is empty, and the 'Valid till' field is empty. The 'Ranking' field is empty. The role holder field is populated with 'Renner Rudi (PP ...)'. There are buttons for adding and removing items.

- **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 / role owner, 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 owner 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.

## Felder

Name	Wert
Modul	Time & Attendance (ta)
Webdesk Actionname	showRoles

Artefakt-Typ	Action
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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