

# User Settings

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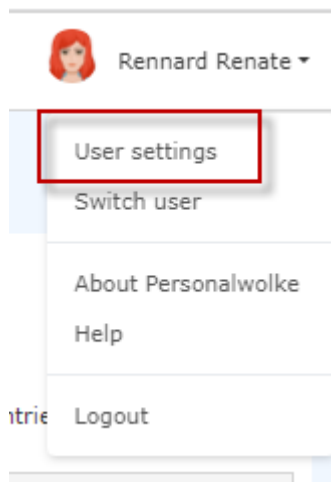
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## General

The "Usersettings" page offers each employee the possibility to determine basic settings for various areas in the Personalwolke or in connection with their workflow agendas.

## How to find the "User settings"



You can find the settings by clicking on your profile picture/avatar or your name in the top right corner of the view.

In the selection window that pops up, please click on "User settings".

The profile view "User settings" will then open.

Settings

Save & Close

Save



Deputy

Project Time

Security

Travel management

Workflow Settings

Language

English

Menu

Desktop

Link Page With Menu

☐

?

Search

Q

Deputy

Role

Vorgesetzter

Person

Wind Werner (SuW-CEO)

...

Valid from

14.02.2023

Valid till

01.01.3000

Role

Vorgesetzter

Person

Sonne Susanne (SuW-CEO)

...

Valid from

14.02.2023

Valid till

01.01.3000

Add

Project Time

Stop effort on going

☒

?

Restart effort on comming

☐

?

Book-in when starting an effort

☐

?

Security

Change password

Enable 2nd Factor Authentication

Travel management

Vehicles

License plate

W-XYZ01

Type

Passenger Car

Fuel

Hybr.Benzin/E

Brand

Renault

Model

Megan

Number of seats

5

Valid from

28.06.2023

Valid till

01.01.3000

Delete

Add Vehicle

Workflow Settings

Notification by mail in case of new ToDo`s

None

My deputy may approve on my behalf

No

Inform after Login in case of new ToDo`s

Yes

## Header

### Avatar:

By clicking on the edit icon next to the default avatar image, you can upload an individual user image in the common image formats.

### Language

Selection option between German and English. A change is implemented as soon as you click on "Save and Close" or "Save".

(Please note that in the English version, terms in German are sometimes used for program-related reasons).

User Settings

ID: 5889-dsy | Version: 9 | Datum: 18.10.26 08:05:59

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## Menu

The following selection options are available:

- Dynamic: the display automatically adapts to the device type
- Mobile: the display designed for mobile devices
- Desktop: the display designed for desktop devices/browsers

## Link Page With Menu

By clicking on this checkbox, you have the option of having the menu tree on the left of the page automatically display where you are with the currently open page.

In practice, if you are redirected to a page other than the start page by a task, for example, you will see exactly where you are. For example, if the approval of a leave is displayed to you as a task, the Workflow/ Open Requests is highlighted in bold in the menu tree.

This linkage is recommended if you frequently have to complete various administrative tasks in the system in your job.

## Page menu

You can jump directly to an editing area of your choice by clicking on this area in the page menu

## Deputy

### NOTIZ

The term "deputy" here is meant to refer to a

- **temporary substitute,**
- **not defined as a role,**
- **for absences** (holiday, sick leave, etc.) in relation to the completion of requests and workflows.

A deputy can only be added for a role that one holds.

It is possible to use one deputy for several roles, or several deputies for the different roles.

A deputy entered here can perform your tasks in the Personalwolke for a precisely defined period of time.

This person has the competence selected by you for the specific period and can release applications for you depending on the assigned role.

If you wish to have a permanent substitute in your role, this must be done via Administration/Create and edit role assignments.

| Deputy       |                         |            |            |
|--------------|-------------------------|------------|------------|
| Role         | Person                  | Valid from | Valid till |
| Vorgesetzter | Wind Werner (SuW-CEO)   | 14.02.2023 | 01.01.3000 |
| Vorgesetzter | Sonne Susanne (SuW-CEO) | 14.02.2023 | 01.01.3000 |

Add

[Vergrößern](#)<sup>8</sup>

The following steps are necessary to enter a deputy:

1. Please click on "Add"
2. Under "Role", one of the roles you hold is entered by default, i.e. at least the role as Time Professional User.

3. However, you can also select another role from the drop-down list.
  4. Under "Person", a staff member can be selected as a deputy:
  5. Valid from/Valid until: the time frame in which the substitution is to take place is to be entered here.
- Editing or deleting is possible using the Edit and Delete icons.

## Project Time

[Vergrößern<sup>9</sup>](#)

NOTIZ

This section might only be displayed if your company works with projects or uses Personalwolke Project-Time.

Project Time

Stop effort on going ☒ ?

Restart effort on coming ☐ ?

Book-in when starting an effort ☐ ?

Three checkboxes are available for selection here.

- **Stop effort on going** (activated by default): a possible running project time booking is also automatically ended by the "Leave" booking. The prerequisite is that a system administrator has configured and activated a corresponding job in the webdesk.
- **Restart effort on coming:** When an arrival booking is made, the project time booking is also automatically started. This newly created project time booking automatically takes over all data from the last project time booking of the same day, or - if none was made on this day - from the previous working day. The prerequisite is that a system administrator has configured and activated a corresponding job in the Webdesk.
- **Book-in when starting an effort:** automatic booking as "present" in the time recording as soon as the entry of a project effort is started, and you were absent before. Only efforts that start with the current time lead to such a booking in the time recording, but those that have a start time from the past or future do not.

## Security

[Vergrößern<sup>10</sup>](#)

Security

Change password

Enable 2nd Factor Authentication

In the Security section, you have the option of initiating a *password change* and activating 2-factor authentication.

You will find all further information on this under *Password*.

You can find information on the subject of passwords from the admin view under *Assign and change password (admin side)*.

[The links will be added soon]

## Travel Management

[Vergrößern](#)<sup>11</sup>

### NOTIZ

This section might only be displayed if your company works with projects or uses Personalwolke Travel.

**Travel management**

Vehicles

|               |               |                        |
|---------------|---------------|------------------------|
| License plate | Type          | Fuel                   |
| W-XYZ01       | Passenger Car | Hybr.Benzin/E          |
| Brand         | Model         | Number of seats        |
| Renault       | Megan         | 5                      |
| Valid from    | Valid till    |                        |
| 28.06.2023    | 01.01.3000    | <a href="#">Delete</a> |

Add Vehicle

This section is used to enter and edit motor vehicles (official cars) assigned to you. It is possible to create several vehicles per person.

Click on "Add Vehicle" to open the input fields.

The following data can be entered:

- Licence plate
- Type (standardised is the choice between car and motorbike)
- Fuel
- Brand
- Model
- Number of seats
- Valid from/until

## Workflow Settings

[Vergrößern](#)<sup>12</sup>

**Workflow Settings**

|                                            |      |
|--------------------------------------------|------|
| Notification by mail in case of new ToDo's | None |
| My deputy may approve on my behalf         | No   |
| Inform after Login in case of new ToDo's   | Yes  |

### Notification per mail in case of new ToDo's:

Selection options

- **None:** The employee does not receive notifications by e-mail
- **On every new ToDo:** The employee receives an email from Personalwolke for each new task.
- **Summery with open ToDo's one a day:**The employee receives a list of all open tasks every day.

## My deputy may approve on my behalf:

NOTIZ

Attention: here the term "deputy" refers to the role setting, not to an absence substitution!

- Yes: My deputy may approve for me
- No: My deputy is not allowed to approve and also does not get a workflow

This parameter influences all applications made from the time of activation. In addition to the role owner, all downstream role owners (insofar as they are deputies according to the deputy regulation) are written into the applications as deputies. In this context, the direction of inheritance within the role must currently also be taken into account. If the inheritance direction is set to "up", the organisation chart is searched upwards for deputies, if it is set to "down", it is searched downwards and if it is set to "none", it is not searched at all.

## Inform after Login in case of new ToDo's

- Yes: When entering the Personalwolke, a pop-up with the number of open tasks is displayed.
- No: No pop-up appears

## Bank Accounts

NOTIZ

The Bank Accounts section is not used by all companies.

The screenshot shows a web form titled "Bank Accounts". It contains several input fields: "Account for" (a dropdown menu with "All payments" selected), "Account owner" (a text field), "Bank name" (a text field), "BIC" (a text field), "IBAN" (a text field), "Valid from" (a date field with a calendar icon), and "Valid till" (a date field with a calendar icon). There is a red "Delete" button next to the "Valid till" field. At the bottom left, there is an "Add" button.

## Felder

| Name               | Wert                   |
|--------------------|------------------------|
| Modul              | Time & Attendance (ta) |
| Webdesk Actionname | getUserSetup           |
| Artefakt-Typ       | Action                 |

1. /daisy/personalwolke-admin/9813-dsy.html?language=4
2. /daisy/personalwolke-admin/9814-dsy.html?language=4
3. /daisy/personalwolke-admin/9817-dsy.html?language=4
4. /daisy/personalwolke-admin/9815-dsy.html?language=4
5. /daisy/personalwolke-admin/9816-dsy.html?language=4