General information

In the menu item **Persons** you will find an overview of all created persons (employees) for your client (company).



Last name - the person's last name

First name - the person's first name

Name - combination of surname and first name

Client - the company the person is assigned to

Group - the group (department, organizational unit) to which the person is assigned (e.g. support, personnel, management, quality assurance, etc.).

Username - the username (incl. fixed prefix pb) for the login to the webdesk portal.

Personnel number - the user-defined personnel number including the company-specific prefix (in this case: 0001).

TA-ID - an ID automatically assigned by the system for time recording (cannot be changed)

Active user

Yes --> the person can log in to the Webdesk Portal

No --> the person can NOT log in to the Webdesk Portal, but is still evaluable

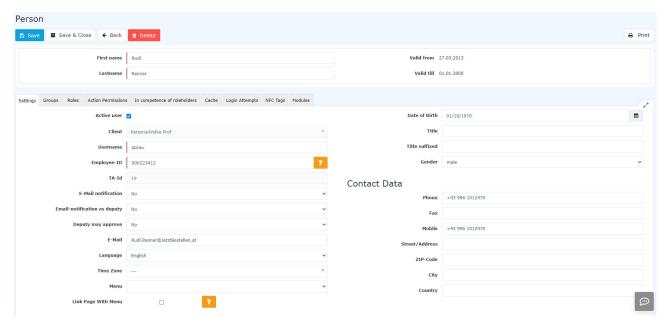
Person master data sheet

A click on a line or on the edit symbol



takes

you to the person master data sheet where data concerning the employee can be changed / the employee can be deleted. An explanation of the individual fields and tabs (tabs) can be found under New Person¹.



Overview 1

Sorting / Search options

This list can be sorted in ascending or descending order using the blue triangles

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and according to various criteria (last name, first name, group, user name, personnel number, TA-ID, active, valid from).

In addition, the white text fields at the beginning of the list offer the possibility to restrict the displayed data records according to various criteria, e.g.: Last name "gs" shows only persons whose last names contain "gs" (enter gs in the text field and start search with Enter / Enter key / click .

To make all records visible again, simply delete the search term from the corresponding field $\boxed{\ \ \ }$

press Enter again.

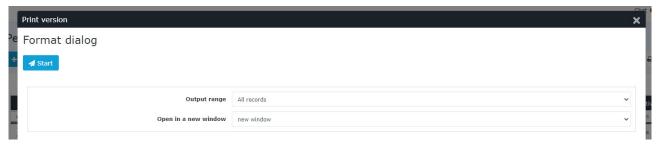


Practical funktions

By clicking one of the 3



the upper right area, the following dialog box opens to specify the data to be displayed in the selected medium (print, PDF, Excel):



Output range

- All Records
 - All employees of the company are displayed in the selected output medium.
- Current selection

Only the currently displayed employees of the company are displayed in the selected output medium.

Open in new window

new window

The selected data sets are displayed in a new window.

current window

The selected datasets are displayed in the current window.

This function is also useful if you want to export a list of employees, possibly filtered according to various criteria. The Excel format is ideal for this.

1. /daisy/personalwolke-admin/5928-dsy.html?language=4

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Overview