## **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

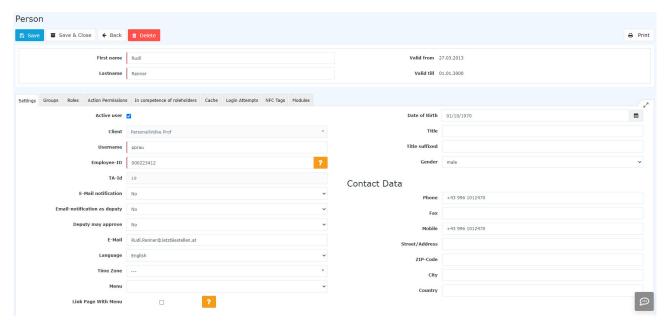
### Person master data sheet

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 Person<sup>1</sup>.



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).

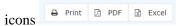
In addition, the white text fields at the beginning of the list offer the possibility to restrict the displayed data records according to various criteria, e.g.: Last name "gs" shows only persons whose last names contain "gs" (enter gs in the text field and start search with Enter / Enter key / click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

To make all records visible again, simply delete the search term from the corresponding field and press Enter again.

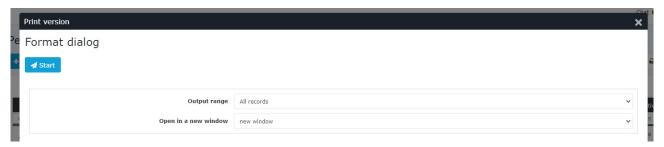


# **Practical funktions**

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

ID: 5946-dsy | Version: 7 | Datum: 25.05.21 13:16:09