

General

A click on "New person" starts the process for creating a new employee.

The following input mask then opens:

The screenshot shows a web-based form for creating a new person. The form is titled "Person" and has a header with "Speichern", "Speichern & Schließen", and "Zurück" buttons. The form is divided into several sections:

- Personal Information:** Fields for "Vorname" (First Name), "Nachname" (Surname), "Geburtsdatum" (Date of Birth), "Akad. Titel" (Academic Title), and "Geschlecht" (Gender). The "Vorname" and "Nachname" fields are marked with an orange star, indicating they are required. The "Geburtsdatum" field has a calendar icon.
- Validity Dates:** Fields for "Gültig von" (Valid from) and "Gültig bis" (Valid until). The "Gültig von" field is marked with an orange star and has the value "06.07.2015". The "Gültig bis" field has the value "01.01.3000".
- Einstellungen (Settings):** A section with a tab labeled "Einstellungen". It contains several fields:
 - "Aktiver Benutzer" (Active User): A checkbox that is checked.
 - "Mandant" (Client): A dropdown menu with "---" selected.
 - "Benutzername" (Username): A text input field marked with an orange star.
 - "Personalnr" (Personal Number): A text input field marked with an orange star and a question mark icon.
 - "ZEF Stammsatznr" (ZEF Stammsatznr): A text input field.
 - "E-Mail-Benachrichtigung" (E-Mail Notification): A dropdown menu with "Nein" selected.
 - "Email-Benachrichtigung als Stellvertreter" (Email Notification as Representative): A dropdown menu with "Nein" selected.
 - "Stellvertreter darf genehmigen" (Representative can approve): A dropdown menu with "Nein" selected.
 - "E-Mail" (E-Mail): A text input field.
 - "Sprache" (Language): A dropdown menu with "--" selected.
 - "Aussehen" (Appearance): A dropdown menu with "--" selected.
- Kontaktdaten (Contact Data):** Fields for "Telefon" (Phone), "Fax", "Mobil" (Mobile), "Strasse/Hausnr." (Street/House Number), "PLZ" (Postal Code), "Stadt" (City), and "Land" (Country).
- Passwort-Management (Password Management):** A section with a checkbox for "Passwort vergeben" (Assign Password) and a label "Zeitpunkt der letzten Passwort-Vergabe" (Last Password Assignment Time).
- Bankkonten (Bank Accounts):** A button labeled "Bankkonten" at the bottom left.

The fields marked with an orange star must be filled in while the unmarked fields are optional.

After entering your **first name** and **surname**, you have to select your company under **Client** and then a **group** to which the person should belong.

WARNUNG

Note: In principle, the required hierarchical **Gruppen**¹ groups (departments) should be created BEFORE persons are created, since a new employee must be assigned directly!

WARNUNG

Important: **After saving** the person, it **MUST** be **added** to at least the **loose group "xxx-ALLE"** under the newly appearing tab Groups (not visible before saving). **Otherwise no menu tree** is available to the user after the login!

After selecting the client, the fields **User name** and **Personnel** number are automatically filled with fixed client-specific prefixes (in this example, "pb" and "0001"). Except for these two prefixes, the **user name** and **personnel number** can be freely selected - but must be unique within the company.

ZEF Master record number is automatically filled by the system and cannot be changed.

E-mail notification controls whether the user should receive an e-mail when new requests for approval / review are received.

E-mail notification as a deputy analogous to the point E-mail notification, only from the viewpoint of the deputy

Activates / deactivates the deputy regulation, i.e. the deputy is authorized / not authorized to approve proposals.

E-mail the e-mail address of the user to whom the notifications will be delivered.

As already mentioned, **the other fields** are optional and self-explanatory.

Once all fields have been filled in, the person can be created by clicking on **Save**. The successful saving is confirmed with a corresponding message (person 'Mustermann Max' was saved successfully!). Only **now** can the password for the user be reset to the default password (=user name) by clicking the **Reset password** button. This must be changed when the user logs in for the first time.

Password-Management

After saving a person, the password of the user can be reset to the default password using **Reset Password**.

WARNUNG

Note: The **default password** corresponds to the **user name including prefix** (case sensitive!) and must be changed after the first login!

Mit Passwort löschen kann das Passwort des des Mitarbeiters gelöscht werden - ein Login ist danach so lange nicht möglich, bis mittels Passwort zurücksetzen wieder ein Passwort vergeben wurde.

People Management

After successful saving, the additional tabs **Groups**, **Roles**, **Action permissions**, **In the competence area** of these role owners and **Modules** appear.

Tab: Groups

Under **Groups**, you can change the assignment to a hierarchical group (organization chart) and add the assignment to a lot group.

Hierarchical Groups

Here you can see that the selected user is currently assigned to the group PB-ENTW (Development) in the organization chart PB. With **Valid from** and **Valid to**, you can define a period in which the person is assigned to a particular group. Under **New Group**, you can select another group and define a time period for the validity of the group membership. The check mark at **with past** determines whether expired (past) group memberships should also be displayed in the list of group memberships.

As an example: Mr. Müller works until 02.05.2013 in the PB-ENTW group and is to belong to the PB-VERTR group from 03.05.2013. To realize this automatically, the Valid until date can already be changed to 02.05.2013 and the group PB-VERTR with Valid from 03.05.2013 can be saved under new group. Thus the group change takes place automatically on the specified key date.

WARNUNG

Note: A person can only be a member of one hierarchical group at a time!

1. </daisy/personalwolke-admin/5884-dsy.html?language=4>