## General

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



#### The following input mask then opens:

Person			
Save Save Save & Close 🗲 Ba	ck		
First name		Valid from	25.05.2021
Lastname		Valid till	01.01.3000
Settings			
Active user	0	Date of Birth	
Client	PersonalWolke Prof	Title	
Group	Select an Option *	Title suffixed	
Username	pp	Gender	~ ~
Employee-ID	000289190 ?	Contact Data	
E-Mail notification	No ~	Phone	
Email-notification as deputy	No	Fax	
Deputy may approve	No ~	Mobile	
E-Mail		Street/Address	
Language	· ·	ZIP-Code	
Time Zone		City	
Skin	•	Country	
Menu	~		
Link Page With Menu	· ?		

The fields marked with a red line 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.

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

Group	Select an Option	*
Username	pp-sup	
	PP-SUP (Support)	
Employee-ID	PP-SUPG (Support Graz)	
E Mail notification	PP-SUPI (Support Innsbruck)	
E-Mail Hourication	PP-SUPW (Support Wien)	

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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.

Active user		
Client	PersonalWolke Prof	v
Group	Select an Option	Ŧ
Username	pp-1234	
Employee-ID	000289190	?

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.

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

Password managem	nent
Password defined	
Last Password Creation time	09.12.2016 10:24
	Reset Password
	Reset 2nd factor Authentication

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.

Settings Groups Roles Action Permissions In competence of roleholders Cache Login Attempts NFC Tags Modules

# 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**

Organigramm PP ~						-
	with History					
New group			Valid from		Valid till	
Select an Option		×		<b>m</b>		<b>m</b>
Orgstructure	Name	Valid from		Valid till		Delete
🚓 Organigramm PP	PP-AGB1 (Geschäftsbereich 1)	06/07/2020	前	01/01/3000		

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.

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

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