FAQ: Creating a new employee with HR-Expert

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Note: you can find how to create a new employee in Personalwolke Time under Administration/ Persons in the menu tree or here.[1]

Prerequisites

Before you create a new employee, you should answer the following questions for yourself:

- Which **department** is the employee in?
  - Does this department **already exist**?
    - Yes: Continue with the next question.
    - **No**: Continue here: Creating a new department (organizational unit)[2]
- What **user name** will the employee get?
- What **employee number** will the employee get?
- Does the employee have a **special function (role)** in the company (HR, supervisor)?
  - No: Continue with the next question
  - **Yes**: **Which one?** HR or supervisor or both?
- Should the employee get additional menu items in Personalwolke?
  - Employee / department administration -> Admin
  - Additional evaluation options for employees --> Management
- Which **time model** (weekly schedule) should be assigned to the employee?

Once you have answered these questions, you have gathered the minimum information required to create a person. You can also store further personal data about the employee (date of birth, address, e-mail, telephone, etc.).

Creating the new employee

Step 1: In HR-Expert, select the employee view on the **dashboard** under **HR** or via the green employee icon

Step 2: Above the list of persons, click **New person**

Step 3: **First name**, **last name**, **client**, **group**, **user name** and **employee no.** must be filled in. The checkbox **Active user** must also be checked if the employee should be able to log in to Personalwolke. All other fields are optional! (The fields user name and employee number are filled in automatically; you can overwrite the default entries after the client-specific prefix, in line with the naming convention chosen by your organization.

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Note: The field for selecting the group is only available after the client has been selected. The fields user name and employee no. are also pre-filled with unchangeable, client-specific prefixes!

Step 4: Save

Step 5: To allow the user to log in, click the **Reset password** button under the **Password** tab. This resets the employee's password to their user name (caution, upper/lower case matters!) and it must be changed during the first login.

*Step 6: Add the employee to the **permission group XX-ALL***

To define the menu items that the employee can select after logging in, the employee must be added to various permission groups.

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> It is **absolutely necessary** to add the employee to the group **XX-ALL**. This unlocks the basic menu items - without this setting, no navigation is possible in Personalwolke!

To do so, proceed as follows: under the tab **Organization / Groups** select the entry **Permission groups** from the dropdown and add the employee to the group **XX-ALL** under **New group**.

Step 7: Save

Steps 6 and 7 can now be repeated to also add the employee to the groups **XX-Admin** or **XX-Management**, if the employee should be able to perform admin or management functions in Personalwolke.

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> The **group XX-Admin** is normally assigned to those employees who should be able to add / edit new persons in Personalwolke or create / edit groups (departments) in the organigram. Membership in the **group XX-Management** unlocks additional menu items for evaluations / statistics (usually assigned to HR staff / supervisors).

Step 8: Special properties for the employee (HR, supervisor)

Under the **Roles** tab, special functions can be assigned to the employee. Specifically, these are the roles HR and supervisor, which give the employee extended viewing permissions (a supervisor may, for example, view the monthly journal of the employees reporting to them) and unlock additional menu items. In addition, the two roles are used in the various workflows (vacation requests, time corrections, etc.) to control who has to approve these requests.

To assign a role to an employee, proceed as follows:

- Select the Roles tab
- Click New role holder
- Under New role holder, click the button with the 3 dots to select the role HR or supervisor
- Under Competence target
  - Person: this specifies that the current employee exercises the selected role (HR, supervisor) for the selected employee.
  - Group: this specifies that the current employee exercises the selected role (HR, supervisor) for the selected group (i.e. for all members of this group).
  - Client: this specifies that the current employee exercises the selected role (HR, supervisor) for the entire client (i.e. for all employees of the client; useful, for example, if there is to be 1 HR manager for all employees)
- Valid from / until: a period can be defined in which this role assignment is valid (can be left empty; the assignment is then valid from now until 1.1.3000 (default setting))

The settings made must be applied by clicking **Save**. This step can be repeated as often as needed in order to assign several roles to the employee for different competence targets.

Step 9: Activating the employee in time tracking (for Personalwolke Time / Personalwolke Time Professional customers)

Setting up time tracking for new employees[3]

1. /daisy/personalwolke-admin/9835-dsy.html?language=4
2. /daisy/personalwolke-admin/9821-dsy.html?language=4
3. /daisy/personalwolke-admin/7325-dsy.html?language=4