

FAQ: Create new employee

Preconditions

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

- In which **department** is the employee located?
 - Does this department already **exist**?
 - Yes: Continue with the next question.
 - No: Continue here: [Create new department \(group\)](#) ¹
- Which **user name** does the employee get?
- Which **employee ID** does the employee get?
- Does the employee have a **special function (role)** in the company (personnel, superior)?
 - No: Continue with the next question.
 - **Yes: Which one?** Personnel or supervisor or both?
- Should the employee get additional menu items in the webdesk?
 - Employee / department administration -> Admin
 - Additional evaluation options for employees --> Management
- Which **time model** (weekly program) should be assigned to the employee?

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

Create the new employee

Step 1: In the menu tree under **Administration**, click on **Persons**.

Step 2: Click New Person above the list of people

Step 3: **First name, last name, client, group, user name** and **employee ID** must be filled in. The checkbox **Active user** must also be checked if the employee is to be able to log in to the webdesk. All other fields are optional!

NOTIZ

Note: The field for selecting the group is only available after the client has been selected. The fields user name and personnel number are also preset with unchangeable, client-specific prefixes!

Person

Speichern Speichern & Schließen Zurück

Vorname * Gültig von 06.07.2015
 Nachname * Gültig bis 01.01.3000

Einstellungen

Aktiver Benutzer
 Mandant --- *
 Benutzername *
 Personalnr * ?
 ZEF Stammsatznr
 E-Mail-Benachrichtigung Nein
 Email-Benachrichtigung als Stellvertreter Nein
 Stellvertreter darf genehmigen Nein
 E-Mail
 Sprache
 Aussehen --


Geburtsdatum
 Akad. Titel
 Geschlecht

Kontaktdaten

Telefon
 Fax
 Mobil
 Strasse/Hausnr.
 PLZ
 Stadt
 Land

Password-Management

Passwort vergeben
 Zeitpunkt der letzten Passwort-Vergabe



Bankkonten

Eine leere Eingabemaske für einen neuen Mitarbeiter.

Person

Speichern Speichern & Schließen Zurück

Vorname Rudolf * Gültig von 06.07.2015
 Nachname Tester * Gültig bis 01.01.3000

Einstellungen

Aktiver Benutzer
 Mandant PersonalWolke Prof *
 Benutzername PP-SUP (Support) *
 Personalnr pp_rt * ?
 ZEF Stammsatznr
 E-Mail-Benachrichtigung Nein
 Email-Benachrichtigung als Stellvertreter Nein
 Stellvertreter darf genehmigen Nein
 E-Mail
 Sprache
 Aussehen --


Geburtsdatum
 Akad. Titel
 Geschlecht

Kontaktdaten

Telefon
 Fax
 Mobil
 Strasse/Hausnr.
 PLZ
 Stadt
 Land

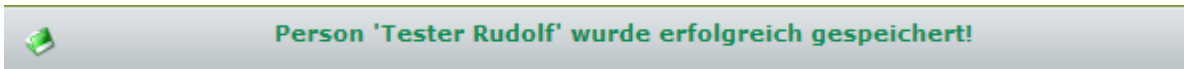
Password-Management

Passwort vergeben
 Zeitpunkt der letzten Passwort-Vergabe

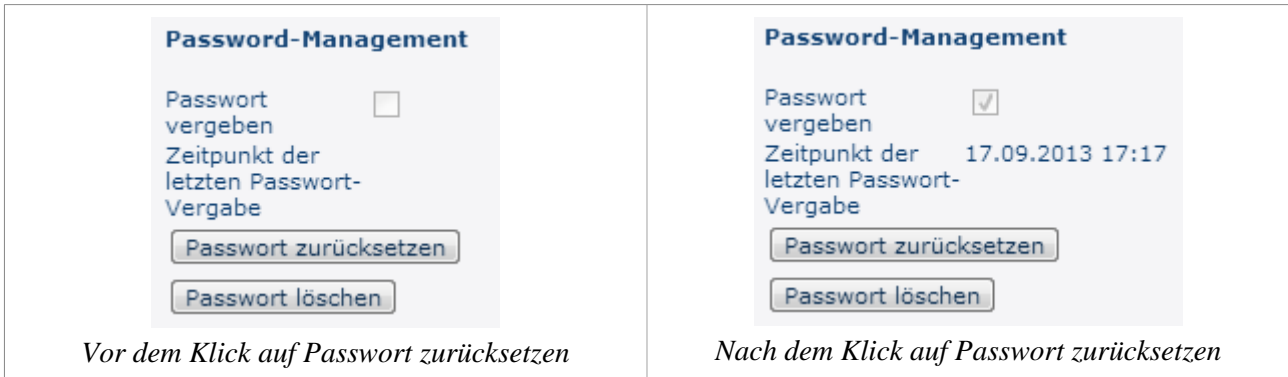


Bankkonten

Step 4: Save - the following success message appears in the status bar:



Step 5: To enable the user to log in, click on the **Reset password** button under **Password management**. This resets the employee's password to his or her user name (attention, upper/lower case relevant!) and must be changed during the first login.



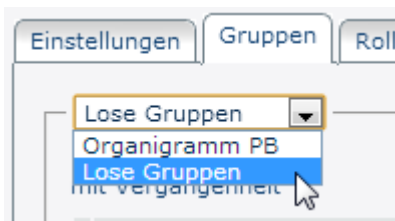
Step 6: Add the employee to lot group **XX-ALLE**.

In order to define the menu items that the employee can select after login, the employee must be added to different lot groups.

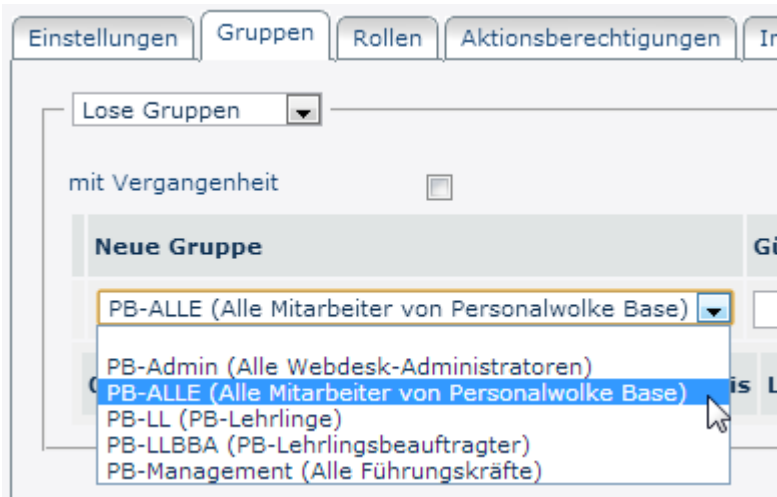
NOTIZ

It is **absolutely necessary** to add the employee to group **XX-ALLE**. This activates the basic menu items - without this setting no navigation is possible in the webdesk!

To do this, proceed as follows: under the **Groups tab**, select the entry **Loose groups** from the drop-down menu



and add the employee to group **XX-ALLE** under **New Group**.



Step 7: Save

After saving, you can see that the employee has been added to the group.



Steps 6 and 7 can now be repeated to add the employee to the **XX-Admin** or **XX-Management** groups, if this admin or management can exercise skills in the webdesk.

WARNUNG

The group **XX-Admin** is normally assigned to those employees who should be able to add / edit new persons in the webdesk or create / edit groups (departments) in the organization chart. The membership in the group **XX-Management** activates additional menu items for evaluations / statistics (usually assigned to personnelists / superiors).

Step 8: Special properties for the employee (personnel, superior)

Special functions can be assigned to the employee under the Roles tab. Specifically, the roles Personnel and Superiors, which give the employee extended access rights (for example, a superior can view the monthly journal of his or her subordinate employees) and enable additional menu items. The two roles are also used in the various workflows (leave 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 on New Role Owner
- Under New Role Owner, click on the button with the 3 points to select the role Personnel or Supervisor.
- Under competence target

- **Person:** this specifies that the current employee performs the selected role (personnel, superior) for the selected employee.
- **Group:** this specifies that the current employee performs the selected role (personnel, superior) for the selected group (i.e. for all members of this group).
- **Client:** this specifies that the current employee performs the selected role (personnel, superior) for the entire client (i.e. for all employees of the client; useful if, for example, there is to be 1 HR manager for all employees).
- **Valid from / to a period** can be defined in which this role assignment is valid (can be left empty; then the assignment is valid from now until 1.1.3000 (standard setting)).

The settings made must be accepted with a click on **Save**. This step can be repeated as often as required in order to assign several roles to the employee for different competence goals.

Step 9: Activating the employee in time recording (for Time-Base / Time-Professional customers)

Entry of employees²

1. </daisy/personalwolke-admin/5981-dsy.html?language=4>
2. </daisy/personalwolke-admin/7325-dsy.html?language=4>