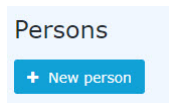
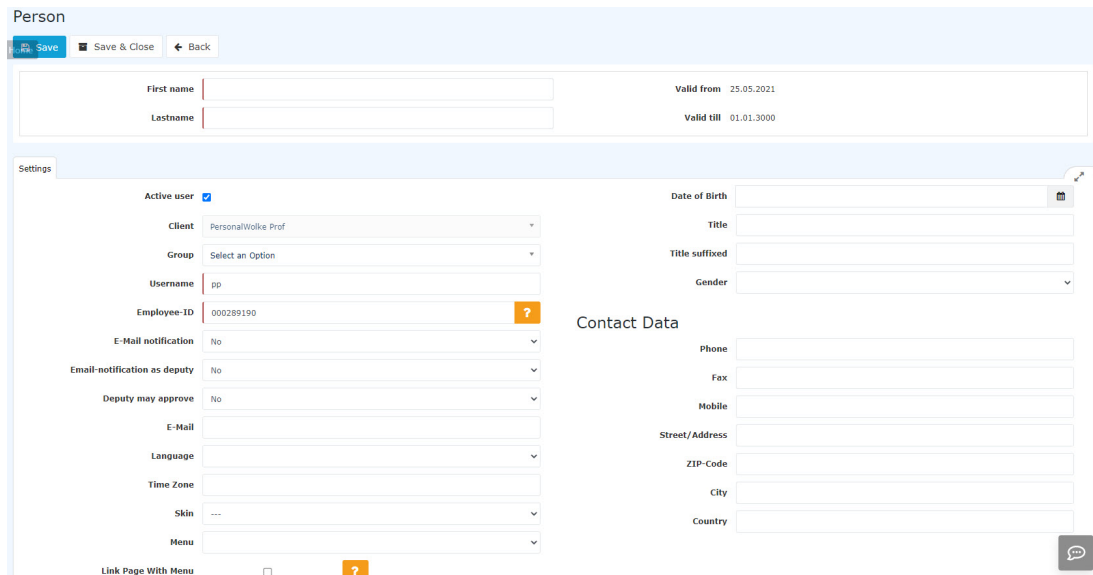


## General

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



The following input mask then opens:



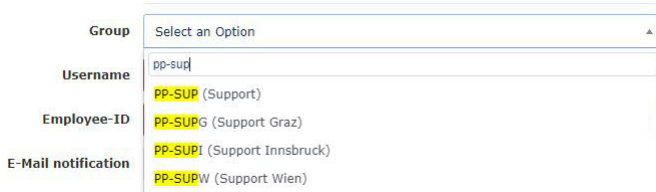
The screenshot shows the 'Person' input mask form. It has a top bar with 'Save', 'Save & Close', and 'Back' buttons. The form is divided into several sections: 'Personal Data' with fields for 'First name', 'Lastname', 'Valid from' (25.05.2021), and 'Valid till' (01.01.3000); 'Settings' with a list of fields including 'Active user' (checked), 'Client' (PersonalWolke Prof), 'Group' (Select an Option), 'Username' (pp), 'Employee-ID' (000289190), 'E-Mail notification' (No), 'Email-notification as deputy' (No), 'Deputy may approve' (No), 'E-Mail', 'Language', 'Time Zone', 'Skin', and 'Menu'; and 'Contact Data' with fields for 'Date of Birth', 'Title', 'Title suffixed', 'Gender', 'Phone', 'Fax', 'Mobile', 'Street/Address', 'ZIP-Code', 'City', and 'Country'. Red lines are drawn under the 'First name', 'Lastname', 'Client', and 'Group' fields. A red question mark icon is next to the 'Employee-ID' field.

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.

### WARNUNG

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!



The screenshot shows the 'Group' dropdown menu. The 'Group' field is set to 'Select an Option'. The 'Username' field contains 'pp-sup'. The 'Employee-ID' field contains 'pp-SUP'. The 'E-Mail notification' field contains 'pp-SUPW'. The dropdown menu is open, showing a list of options: 'pp-SUP (Support)', 'pp-SUPG (Support Graz)', 'pp-SUPI (Support Innsbruck)', and 'pp-SUPW (Support Wien)'. The 'pp-SUP' option is highlighted in yellow.

### 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.

Active user

Client

Group

Username

Employee-ID  ?

**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!

### Password management

Password defined

Last Password Creation time 09.12.2016 10:24

Reset Password

Reset 2nd factor Authentication

## People Management

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

Settings

### 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 ▾				
Orgstructure	Name	Valid from	Valid till	Delete
Organigramm PP	PP-AGB1 (Geschäftsbereich 1)	06/07/2020	01/01/3000	<input type="checkbox"/>

Here you can see that the selected user is currently assigned to the group PB-AGB1 (Geschäftsbereich 1) in the organization chart PP. 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 PP-ENTW group and is to belong to the PP-AGB1 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-AGB1 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-default-en/Time-Base/10473-dsy/Groups.html>