

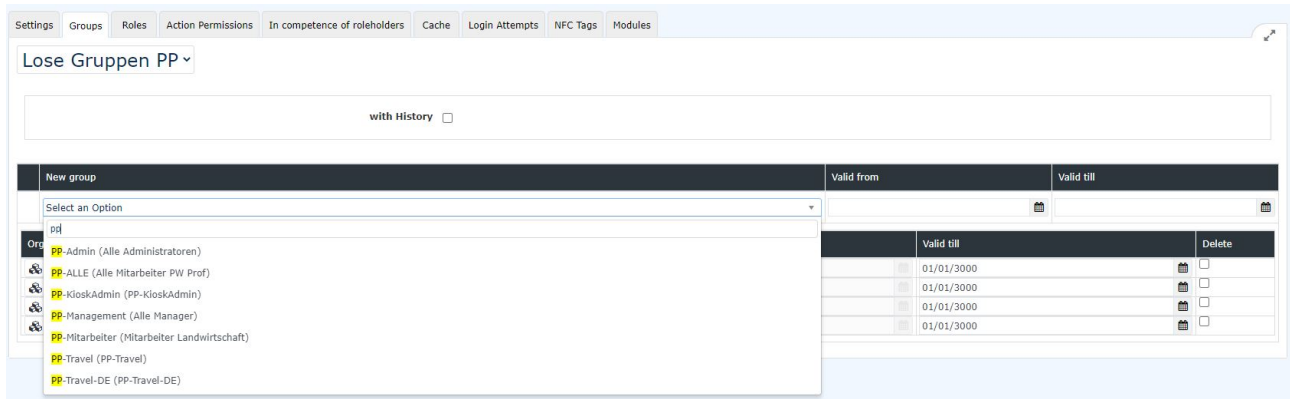
# Personen\_02\_TimeBase\_LoseGruppen\_Rollen

## Loose Groups

Under **Loose groups** you can define the affiliation to several non-hierarchical groups. The number of loose groups to which the employee can be assigned is unlimited.

WARNUNG

Note: The user must always be assigned to the loose group xx-ALLE - otherwise no menu tree is available after login!



(This screenshot shows the 3 standard loose groups. The new user must be assigned at least to the group xx-ALLE (PB-ALLE).)

WARNUNG

In order to offer the user **additional rights** (also in the Project-Time and Travel modules), he must also be added to one of the following loose groups!

### Personalwolke Time:

PB-ALLE	PB-ALLE + PB-Management	PB-ALLE + PB-Admin
Standard-Group - every user MUST be assigned to this group!	Management-Group - users who are added to this group receive additional menu items for the evaluation of company employees - <a href="#">Konten Auswertung</a> <sup>1</sup> , <a href="#">Kalenderübersicht</a> <sup>2</sup> , <a href="#">Jahreskalender</a> <sup>3</sup> und <a href="#">Statistik</a> <sup>4</sup> .	Administrator-Group -Users added to this group get additional menu items for managing the <a href="#">Organigramms</a> <sup>5</sup> , <a href="#">Personen</a> <sup>6</sup> people, <a href="#">Gruppen</a> <sup>7</sup> and <a href="#">Rollen</a> <sup>8</sup> roles, as well as the ability to <a href="#">Benutzer umschalten</a> <sup>9</sup> switch users to view the webdesk from the perspective of the selected user.

Of course it is also possible to add a user to all loose groups and thus unlock the administration AND management menu items to the user or a simple standard user is created which is only added to the loose group PB-ALLE.

WARNUNG

The menu item Time management --> Correction client represents a special case. Only persons who have assigned the Personnel role can use this correction client (regardless of the loose groups to which they have been added) to change bookings.

## Personalwolke Travel

If you are a user of the "Travel" module, the following loose groups are also available for managing user rights:

PB-TM-User	PB-TM-Manager	PB-TM-Admin
<ul style="list-style-type: none"><li>Apply for / account for trip (depending on the definition according to the furnishing workshop)</li><li>Info / My travels</li></ul>	<ul style="list-style-type: none"><li>Management / Travel of my employees</li></ul>	<ul style="list-style-type: none"><li>Administration / Travel Expenses / All Trips</li><li>Management / Travel of my employees</li></ul>

## Personalwolke Project-Time

If you are a user of the "Project Time" module, the following loose groups are also available for managing user rights:

PB-PTM-Usr	PB-PTM-Mgm	PB-PTM-ProjMngr	PB-PTM-Admin
<ul style="list-style-type: none"><li>Project time booking</li><li>Enter project time</li><li>Info / My project times</li></ul>	<ul style="list-style-type: none"><li>Enter project time</li><li>Management / project times of my employees</li></ul>	<ul style="list-style-type: none"><li>Management / Project expenses</li></ul>	<ul style="list-style-type: none"><li>Enter project time</li><li>Administration / Project time / Projects</li><li>Management / project times of my employees</li></ul>

We select the **PB-ALLE** group and click Save. This assigns the employee to the loose group **PB-ALLE**.

In summary, it can be said that when creating a new person regarding the groups / roles, the following things must be considered:

- **Person has been assigned to exactly one hierarchical group.**
- **Person has been assigned to the loose group PB-ALLE.**
- Person gets optional additional rights by adding to loose groups
  - PB management and / or PB admin (when using the time module)
  - PB-TM user / PB-TM manager / PB-TM admin (when using the travel module)
  - PB-PTM-User / PB-PTM-Mgm / PB-PTM-ProjMngr / PB-PTM-Admin (when using the project time module)
- Person gets optional additional rights (correction client) by adding the role Personnel

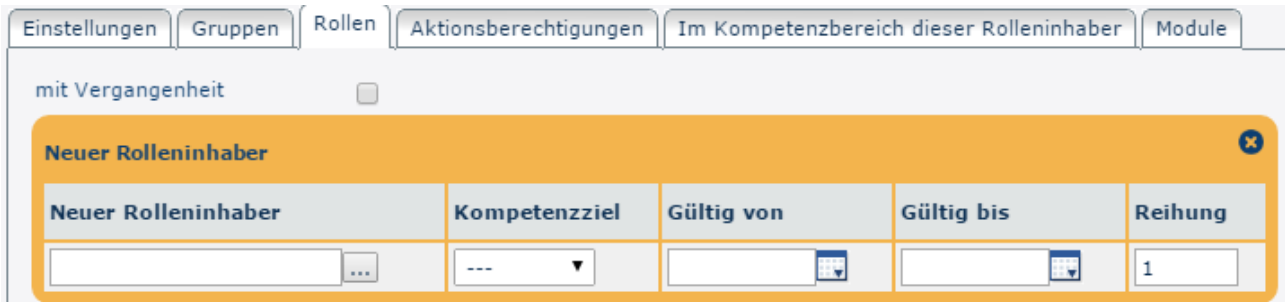
Role assignment for managers and personnel is explained in the next section.

## Tab: Roles

Under **Roles**, you can find an overview of the roles assigned to this person in the company. The following screenshot shows that the person has not yet been assigned a role.



If the employee is now to be assigned another role (superior, personnel), this is done by clicking on the **New Role Holder** button.



- **New role assignment** Selection of the role (personnel) to be assigned to the employee.
- **Competence target** refers to the person/group for which the employee is to be responsible.
- **Valid from / Valid to** describes the period in which the employee is assigned the selected role.
- The **order** determines the deputy (sequence 1 = superior, 2 = deputy, 3,4 = if several persons are defined as deputies, the system determines who receives an application for processing).

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Example: New role assignment "superior", competence objective: group, "PB-ENTW (development)" - this means that the person performs the role of superior for the group PB-ENTW, i.e. all applications submitted by a person from the group PB-ENTW and requiring approval / review by the role of superior end up with this person. Of course, a special person could also be appointed instead of the group. In this case, the Superior role only applies to the person who was defined.

A person can be assigned several roles with different competence goals!

A click on **Save** defines that the employee is now the **manager of the PB-ENTW (Development) group**.

The assigned roles can also be withdrawn / changed from the user by means of

Delete

Edit

1. /daisy/personalwolke-default-en/Time-Base/10313-dsy/ta\_getOrgJournal\$Base.cact.html
2. /daisy/personalwolke-default-en/Time-Base/10313-dsy/ta\_getOrgCalendar\$Base.cact.html
3. /daisy/personalwolke-default-en/Time-Base/10313-dsy/ta\_getOrgCalendarYearly\$Base.cact.html
4. /daisy/personalwolke-default-en/Time-Base/10313-dsy/ta\_getStatistic\$Base.cact.html
5. /daisy/personalwolke-default-en/Time-Base/10473-dsy/po\_orgBuilder.act.html
6. /daisy/personalwolke-default-en/Time-Base/10473-dsy/5885-dsy.html
7. /daisy/personalwolke-default-en/Time-Base/10473-dsy/Groups.html
8. /daisy/personalwolke-default-en/Time-Base/10473-dsy/po\_showRoles.act.html
9. /daisy/personalwolke-default-en/6124-dsy/5887-dsy.html