# 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 Personalwolke?
  - 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

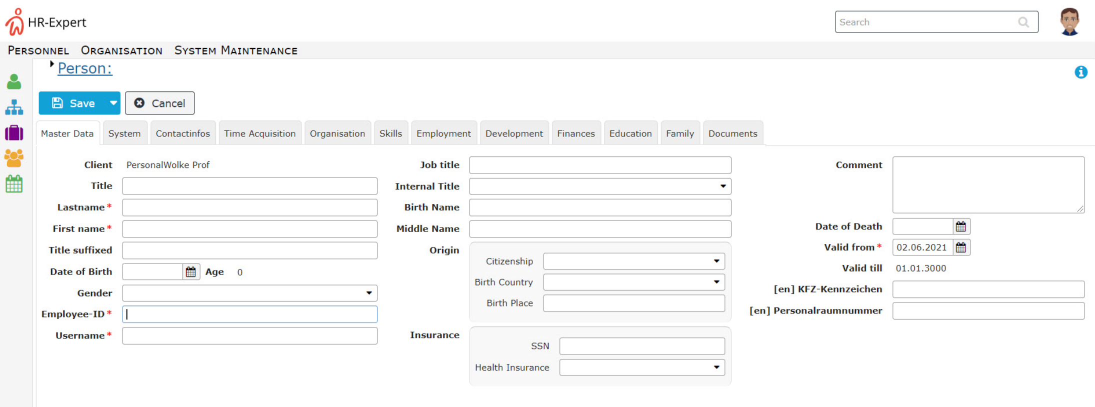
***Step 1:*** In the menu tree under **Administration**, click on **Persons**.

***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!

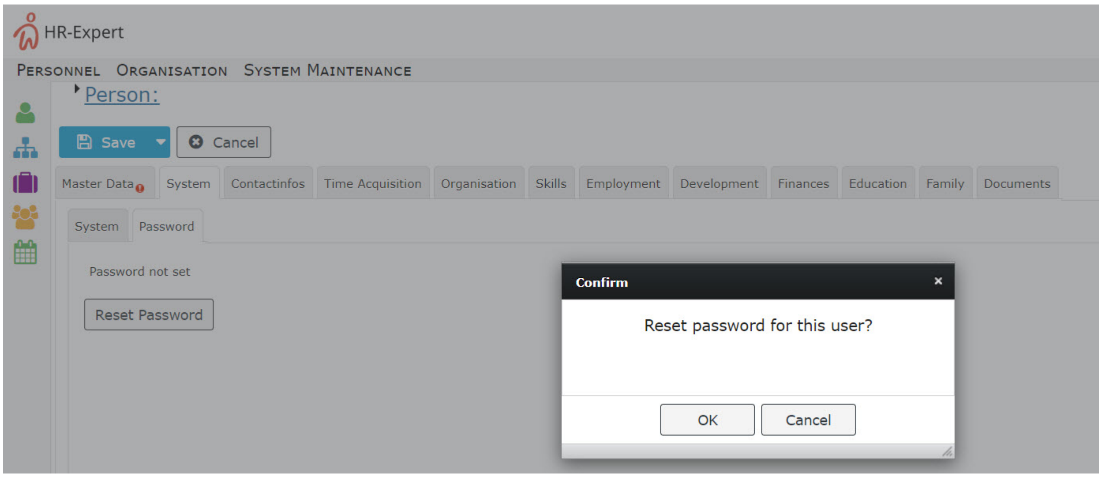
NOTIZ

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!




***Step 4:*** **Save**

***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.

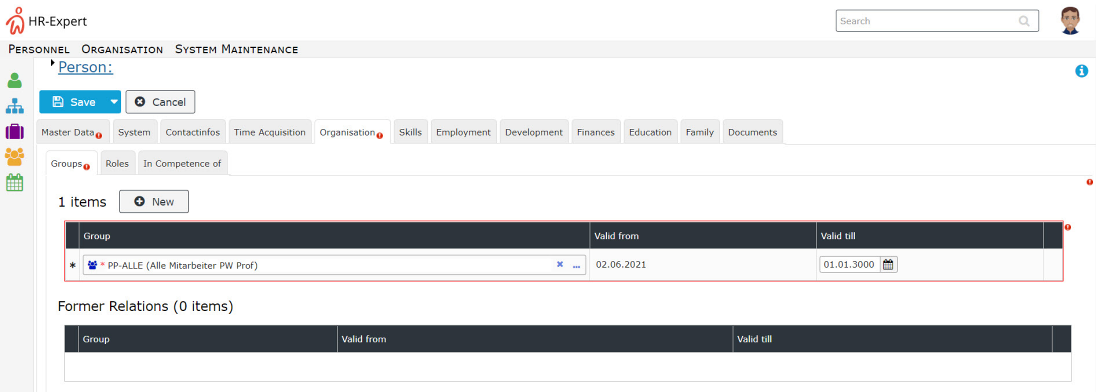



## *Step 6: Add the employee to lose group XX-ALLE.*

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 **tab Organisation / Groups**, select the entry **lose groups** from the drop-down menu and add the employee to group **XX-ALLE** under **New Group**.




## *Step 7: Save*

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 employees*[2]

1. /daisy/personalwolke-default-en/5981-dsy.html
2. /daisy/personalwolke-default-en/6312-dsy/g2/g1/7325-dsy.html