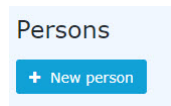


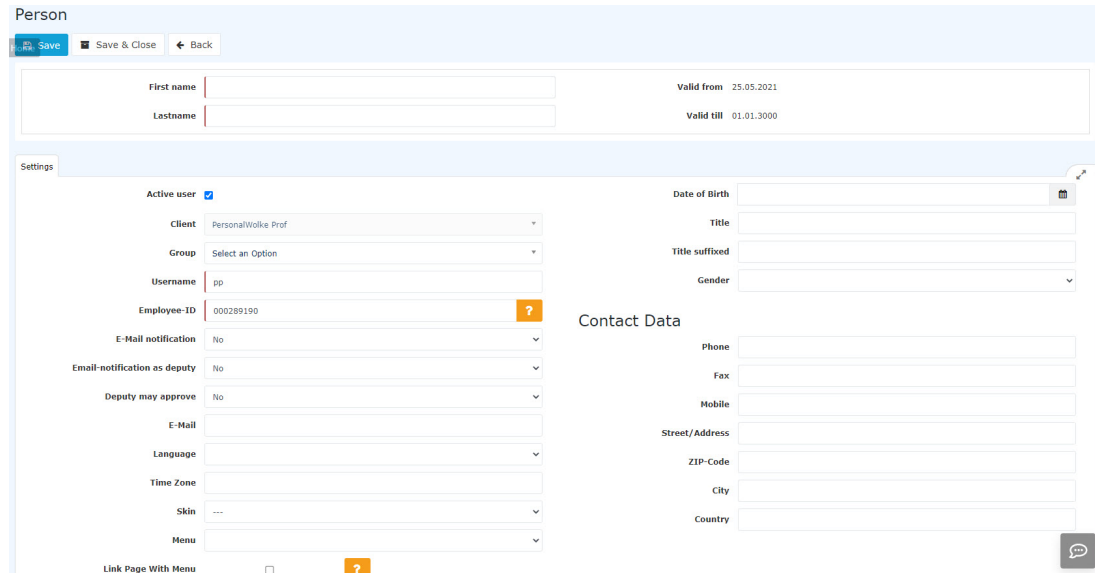
# New person / new employee

## General

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



The following input mask then opens:

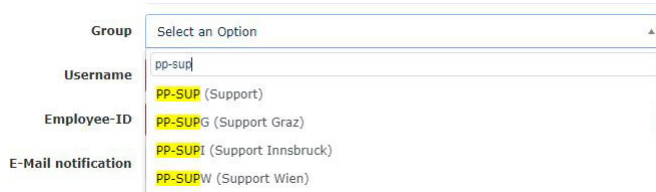
A screenshot of a web form titled 'Person'. At the top, there are buttons for 'Save', 'Save & Close', and 'Back'. The form is divided into several sections. The top section has fields for 'First name' and 'Lastname', each with a red underline indicating they are required. To the right of these are 'Valid from' (25.05.2021) and 'Valid till' (01.01.3000). Below this is a 'Settings' section with a 'Active user' checkbox checked. It includes dropdowns for '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'. To the right of the settings is a 'Contact Data' section with fields for 'Date of Birth', 'Title', 'Title suffixed', 'Gender', 'Phone', 'Fax', 'Mobile', 'Street/Address', 'ZIP-Code', 'City', and 'Country'. Some fields in the settings section have a red underline. There are also orange question mark icons next to the 'Employee-ID' and 'Menu' fields.

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!

A screenshot of a dropdown menu for 'Group'. The dropdown is open, showing a list of options: 'pp-sup', 'pp-SUP (Support)', 'pp-SUPG (Support Graz)', 'pp-SUPI (Support Innsbruck)', and 'pp-SUPW (Support Wien)'. The 'pp-sup' option is highlighted.

### 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 PersonalWolke Prof

Group Select an Option

Username pp-1234

Employee-ID 000289190 ?

**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 Groups Roles Action Permissions In competence of roleholders Cache Login Attempts NFC Tags Modules

## 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

## 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!

Settings Groups Roles Action Permissions In competence of roleholders Cache Login Attempts NFC Tags Modules

Loose Gruppen PP ▾

with History ☐

New group	Valid from	Valid till
Select an Option		

	Valid till	Delete
01	01/01/3000	<input type="checkbox"/>
02	01/01/3000	<input type="checkbox"/>
03	01/01/3000	<input type="checkbox"/>
04	01/01/3000	<input type="checkbox"/>

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

PP-ALLE	PP-ALLE + PP-Management	PP-ALLE + PP-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="#">Accounts evaluation</a> <sup>1</sup> , <a href="#">Calendar overview</a> <sup>2</sup> , <a href="#">Yearly calendar</a> <sup>3</sup> und <a href="#">Statistics</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="#">People</a> <sup>6</sup> , <a href="#">Groups</a> <sup>7</sup> and <a href="#">Roles</a> <sup>8</sup> , as well as the ability to <a href="#">Switch users</a> <sup>9</sup> to view the Personalwolke 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 PP-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. In some cases users can also use correction client for tracking time.

## Personalwolke Travel

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

PP-TM-User	PP-TM-Manager	PP-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:

PP-PTM-Usr	PP-PTM-Mgm	PP-PTM-ProjMngr	PP-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>

## How to add user to a group

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

Settings Groups Roles Action Permissions In competence of roleholders Cache Login Attempts NFC Tags Modules

Lose Gruppen PP ▾

with History ☐

New group valid from valid till

Select an Option ▾

Orgstructure	Name	Valid from	Valid till	Delete
Lose Gruppen PP	PP-KioskAdmin (PP-KioskAdmin)	28/01/2020	01/01/3000	<input type="checkbox"/>
Lose Gruppen PP	PP-Admin (Alle Administratoren)	06/06/2013	01/01/3000	<input type="checkbox"/>
Lose Gruppen PP	PP-ALLE (Alle Mitarbeiter PW Prof)	27/03/2013	01/01/3000	<input type="checkbox"/>
Lose Gruppen PP	PP-Management (Alle Manager)	27/03/2013	01/01/3000	<input type="checkbox"/>

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

- **Person has to be assigned to exactly one hierarchical group.**
- **Person has to be assigned to the loose group PP-ALLE.**
- Person gets optional additional rights by adding to loose groups
  - PP management and / or PP admin (when using the time module)
  - PP-TM user / PP-TM manager / PP-TM admin (when using the travel module)
  - PP-PTM-User / PP-PTM-Mgm / PP-PTM-ProjMngr / PP-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 some roles assigned.

Settings Groups Roles Action Permissions In competence of roleholders Cache Login Attempts NFC Tags Modules

with History ☐

+ New Role Assignment

Entries 1 - 3 of 3 | << < 1 > >> | Lines: 5 ▾

Name	Competence target	Inherited from	Valid from	Valid till	Ranking	Delete / Edit
Personal	PersonalWolke Prof		10/06/2013	01/01/3000	1	
Vorgesetzter	PP-GF (Personalwolke GmbH)		19/01/2016	01/01/3000	1	
Personal	PersonalWolke Prof	PP-Management (Alle Manager)	21/02/2014	01/01/3000	1	

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

Settings Groups Roles Action Permissions In competence of roleholders Cache Login Attempts NFC Tags Modules

with History ☐

+ New Role Assignment

New Roleholder	Competence target	Valid from	Valid till	Ranking
...	---			1

- **New role assignment** Selection of the role through clicking on the 3 horizontal dots (manager (Vorgesetzter), personnel (Personal) 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).

Example: New role assignment "Vorgesetzter", 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!

The assigned roles can also be withdrawn / changed from the user by means of Delete (Bin Symbol)/ Edit (Edit Symbol).

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

## Tab: Action authorizations

No changes can be made under **Action authorizations**.

For the sake of good order, however, it should be mentioned that the actions that can be called by the members of the group are displayed here.

## Tab: In the area of competence of these role holders

In this tab one finds an overview of the persons who are "responsible" for the user, for example Huber Peter is the manager of the user.

Person

Save Save & Close Back Delete Print

First name: Rudi Valid from: 27.03.2013

Lastname: Renner Valid till: 01.01.3000

Settings Groups Roles Action Permissions In competence of roleholders Cache Login Attempts NFC Tags Modules

Show/hide extended search Entries 1 - 4 of 4 << 1 >> | Lines: 15

Role	Owner	Ranking	Valid from	Valid till
Personal	Renner Rudi (PersonalWolke Prof)	1	10.06.2013	01.01.3000
Personal	Personalwolke GmbH (PersonalWolke Prof)	1	20.02.2014	01.01.3000
Personal	Alle Manager (PersonalWolke Prof)	1	21.02.2014	01.01.3000
Vorgesetzter	Huber Peter (PersonalWolke Prof)	1	06.07.2018	01.01.3000

## Tab: Modules

### Travel

In the tab **Travel** you can add vehicles. These vehicles can be selected by the person (when using the **Travel module**) in the Kilometre allowance tab of Travel Expenses. This makes it possible to keep a virtual logbook. After a click on the button **Add** the following mask appears:

The screenshot shows a web application interface for 'Travel management'. At the top, there is a navigation bar with tabs: Settings, Groups, Roles, Action Permissions, In competence of roleholders, Cache, Login Attempts, NFC Tags, and Modules. Below this, there is a dropdown menu for 'Travel management'. The main section is titled 'Vehicles' and contains a table with the following columns: License plate, Type, Brand, Model, Number of seats, Fuel, Valid from, Valid till, and a Delete button. The table has one row with the following data: License plate 'W-FLOW2', Type 'Passenger Car', Brand 'VW Sharan', Model '5', Number of seats '5', Fuel '4711', Valid from '04/11/2020', Valid till '01/01/2000', and a Delete button. Below the table, there is an 'Add Vehicle' button. At the bottom, there is a field for 'Taxable Distance from home to work' with a value of '0' and a question mark icon.

Explanation of the individual table columns:

- **Indicator**  
The complete registration number of the registered vehicle must be indicated here.
- **Type**  
In this dropdown element, a distinction must be made between passenger cars, motorcycles and trucks.
- **Brand**  
The car / motorcycle / truck brand must be entered here by direct input.
- **Model**  
Optionally, the model can also be entered here for specification in addition to the brand.
- **Number of seats**  
Here you have the possibility to indicate the number of carpooling opportunities.
- **Fuel**  
In this field, you can enter whether the vehicle is powered by petrol / diesel / electricity / biofuel / etc.
- **Valid from and Valid to**  
These mandatory fields must be used to determine how long the vehicle is visible in the Mileage allowance tab of Travel Expenses.

After filling in this form, the entry must be accepted by clicking on the **Save** button. Any number of vehicles per person can be added. By clicking the Bin Symbol (next to the **Valid to** field), added vehicles can be removed again.

## Groupware

If the optional **groupware module** has been ordered, you can check if the connection to the groupware system (currently **Microsoft Exchange**, **LotusNotes** and **ZIMBRA** are supported) is working. No changes can be made - this tab only provides a status view.

## Time recording

In order to **activate time recording** for the user, the check mark for Activate time recording must be set in this view. Afterwards one of the preset **weekly programs** must be selected!

After checking the box and selecting a week program, the settings are saved with **Save**.

Person

Save Save & Close Back Delete Print

First name Rudi Valid from 27.03.2013  
 Lastname Renner Valid till 01.01.2000

Settings Groups Roles Action Permissions In competence of roleholders Cache Login Attempts NFC Tags Modules

Time Acquisition  
 TA-Id 19 Delete Time & Attendance data  
 Time acquisition begins 26/03/2013 Rerun daily accounting ...

Week program  
 Week program 1 - Glz/38,3  
 Upcoming Week Program Changes  

From	Week program	Delete
+ Add new program		

Part time per cent  
 Part time per cent 100.00  
 Upcoming Part Time Percentage Changes  

From	Part time per cent	Delete
+ Add part time		

## Daily settlement

With the button Daily accounting this can be started. After clicking on the button, a window opens in which further settings must be made:

Employee Renner Rudi  
 Start date 01/01/2021  
 Mode Reassign complete Timemodels and permissions  
 Start accounting

- **From**
  - Enter the date from which the daily billing is to be started (each day is recalculated starting with the set date according to the selected mode up to the current day).
- **Modus**
  - Copy time models and authorizations from master record
  - Re-billing with historical time model references
  - Time model from historically set weekly program

With a click on "Start daily accounting" the daily accounting is started according to the selected settings.

## Master Data

Subsequently, some settings should be made under **Master data** in the second third of the window. Further information can be found **here**.