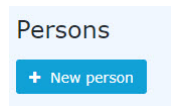


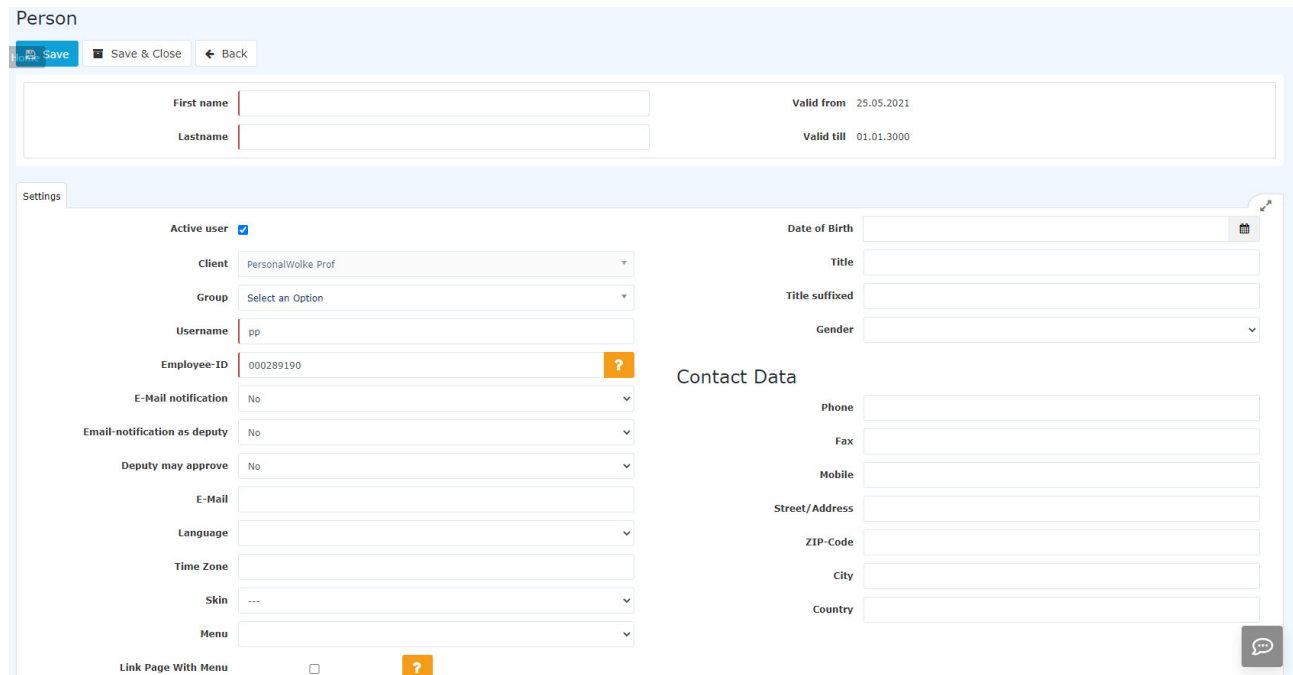
# Personen\_01\_ALL\_Allg\_PwMgmt\_PersVerw\_GrHier

## General

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



The following input mask then opens:



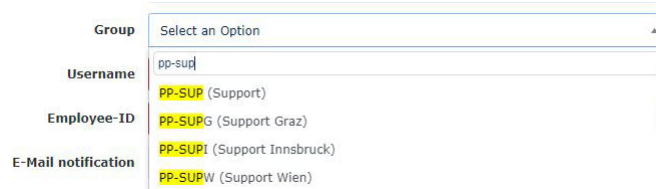
The 'Person' input mask form is divided into several sections. At the top, there are buttons for 'Save', 'Save & Close', and 'Back'. Below these are fields for 'First name' and 'Lastname', both marked with a red line indicating they are required. To the right of these are 'Valid from' (25.05.2021) and 'Valid till' (01.01.3000) fields. The 'Settings' section on the left includes a list of fields: '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'. The 'Contact Data' section on the right includes fields for 'Date of Birth', 'Title', 'Title suffixed', 'Gender', 'Phone', 'Fax', 'Mobile', 'Street/Address', 'ZIP-Code', 'City', and 'Country'. A 'Link Page With Menu' checkbox is at the bottom left. A red line is also present under 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!

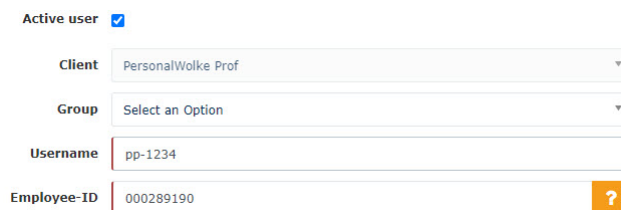


The 'Group' dropdown menu is open, showing a list of options: 'pp-sup', 'PP-SUP (Support)', 'PP-SUPG (Support Graz)', 'PP-SUPI (Support Innsbruck)', and 'PP-SUPW (Support Wien)'. The 'pp-sup' option is selected.

### 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.



A form for creating a new user. It includes a checkbox for 'Active user' which is checked. Below it are dropdown menus for 'Client' (set to 'PersonalWolke Prof') and 'Group' (set to 'Select an Option'). There are text input fields for 'Username' (containing 'pp-1234') and 'Employee-ID' (containing '000289190'). A question mark icon is next to the Employee-ID field.

**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**.

### WARNING

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.



A row of navigation tabs: Settings, Groups, Roles, Action Permissions, In competence of roleholders, Cache, Login Attempts, NFC Tags, Modules. The 'Groups' tab is currently selected and highlighted.

## 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	

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 PB-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/5884-dsy.html?language=4>