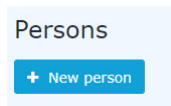
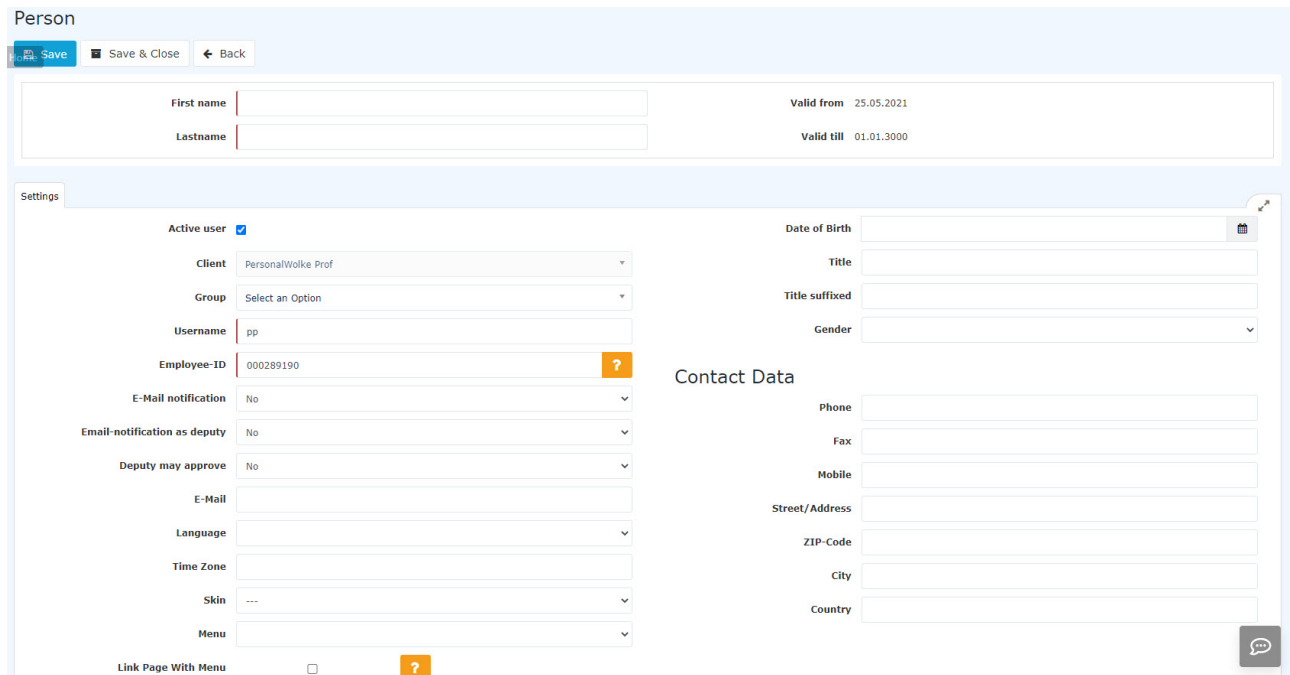


General

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



The following input mask then opens:



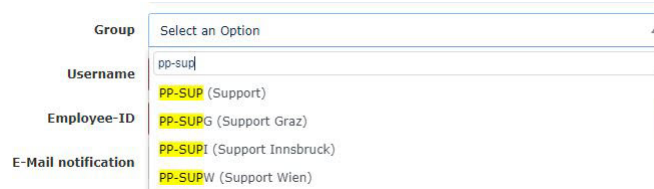
The screenshot shows the 'Person' input mask form. It has a top bar with 'Save', 'Save & Close', and 'Back' buttons. The form is divided into several sections: 'Personal Data' (First name, Lastname, Valid from, Valid till), 'Settings' (Active user, Client, Group, Username, Employee-ID, E-Mail notification, Email-notification as deputy, Deputy may approve, E-Mail, Language, Time Zone, Skin, Menu), and 'Contact Data' (Date of Birth, Title, Title suffixed, Gender, Phone, Fax, Mobile, Street/Address, ZIP-Code, City, Country). Red lines are drawn under the 'First name' and 'Lastname' input fields. There are also orange question mark icons next to the 'Employee-ID' and 'Link Page With 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](#)¹ (departments) should be created BEFORE persons are created, since a new employee must be assigned directly!



The screenshot shows the 'Group' dropdown menu. The selected option is 'Select an Option'. The dropdown list contains the following 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 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 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 ▾		<input type="text"/>	<input type="text"/>	
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/5884-dsy.html?language=4