Creating and editing via the "Roles" function

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Creating a new role holder

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Step 1: Open the roles overview

- Select the role whose assignment is to be edited
- Clicking the row of the role to be edited opens the screen for this role.

Here you will find an overview of the assignment information

- Name: name of the role
- Description: details on the function of the role
- Client: when administering several clients, you can switch here

All other fields cannot be edited and are only needed for internal use by the system administrators.

Step 2: "Role holders" tab

In this area you get the information on existing assignments of the role within your company.

The following fields are displayed

Competence target: indicates for which unit in the organization a role can be exercised. It is also possible to assign several competence targets per role.

Possible competence targets

- the entire client (= your organization as a whole)
- one or more groups in your organization (organizational units, permission groups, locations, cost centers)
- one or more individual persons from your organization

Role holder: indicates who holds this role at a certain point in time (= query date)

Possible role holders:

- a group within your organization (organizational units, permission groups, locations, cost centers)
- one or more individual persons from your organization

Sequence

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A role is associated with permissions. These permissions determine which workflow tasks are tied to a role. The sequence of the holders of a role determines the order in which the system presents these tasks.

In principle, tasks etc. are always presented to the first in the sequence.

Sequence 1: is presented the tasks first.
Sequence 2: is presented the task second
Sequence 3: receives the task if 1 or 2 are not available or not present (vacation, etc.)
Sequence 4: receives the task if only one or none of those ahead of them in the sequence is available or present

If two employees are given, for example, sequence 3, the one who was created first in the system of the two is presented the task first.

In principle, an unlimited number of role holders can be defined for this sequence.
It is also possible to combine assignments in the sequence to groups and persons as role holders.

Example
The supervisor of the requesting person is the first to decide on vacation requests.
Second in the sequence is their deputy.
If both are unavailable, the HR department decides.

If you want to enter several role holders for the opened role, you can use the **"Show/hide advanced search"** feature to expand a search function:

Selecting the competence targets (all, person, group, client) or the role holders (all, person, group, client) filters out only those role holders that match the search terms.

In addition, you can reverse the display order by clicking the small arrows next to the column headings "Competence target" or "Role holder".

Step 3: New role holder

Clicking the **"New role holder" button**

opens the input screen.

The following input fields are available and must be filled in:

1. Competence target

= what area of responsibility does the new role holder have?

Selection options

- Persons
- Group
- Client

Once you have selected the type of competence target, you can make a precise selection in the field below: either by entering the whole name or the first letters of the name and using autocomplete, or by choosing someone or a group from the list that opens when you click the three dots next to the input field.

2. Role holder

Selection options

- Persons
- Group
- Dynamic role assignment

Dynamic role assignment: this only makes sense in combination with the role "Colleague". A dynamic role assignment means that all holders of this role have mutually effective permissions, e.g., with a dynamic role assignment, employee A can, as a colleague of employee B, enter a sick note in Webdesk for B and vice versa. If employees C, D and E also have the dynamic role assignment as "Colleagues", all of these employees can represent each other in Webdesk or for other permissions.

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> Attention! Please **do not use the dynamic role assignment in connection with the role "Supervisor"**! The action permissions associated with this role lead to a conflict in the system!

Once a selection has been made for the type of role holder, you can make the detailed selection in the field immediately below, either by entering the name, by entering the beginning of the name and using autocomplete, or by clicking the three dots, which opens the list of employees of your organization or the list of groups (organizational units, permission groups, and possibly also locations and cost centers). Please select the future role holder here by clicking.

3. Valid from/Valid to:

to limit possible assignments.

If nothing is entered, the fields are filled with today's date and 01/01/3000, respectively.

4. Sequence

Enter here the rank the future role holder has in relation to the role.

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> Entering a number determines the order in which the system presents tasks and requests addressed to the role itself to the role holders.

All requests concerning the role are presented first to the first in the sequence (determined by entering "1" in this field).
Requests etc. are assigned to the second if the first role holder is unavailable. After the second come number 3, number 4 and so on.
It is possible to mix persons and groups in the sequence of a role assignment!

The sequence is entered as numbers (1, 2, 3, 4, 5....)

The "+" (plus) button lets you create **further role holders** for the role.

Clicking "Save" or "Save and close" completes the process. The assignment is effective from the selected "Valid from" date. If you selected the day on which you make the entry, it is immediately visible in the roles overview.

Editing or deleting a role assignment

Both are done in the list of existing role holders for the specific role, using the icons in the row.

Clicking the edit icon

lets you change an existing assignment.

This change is made in the same way as creating a new role holder.

The role can be deleted immediately, e.g., in case of an erroneous assignment, with the

icon.