Creating and editing via the person

Step 1: Select a person[1]

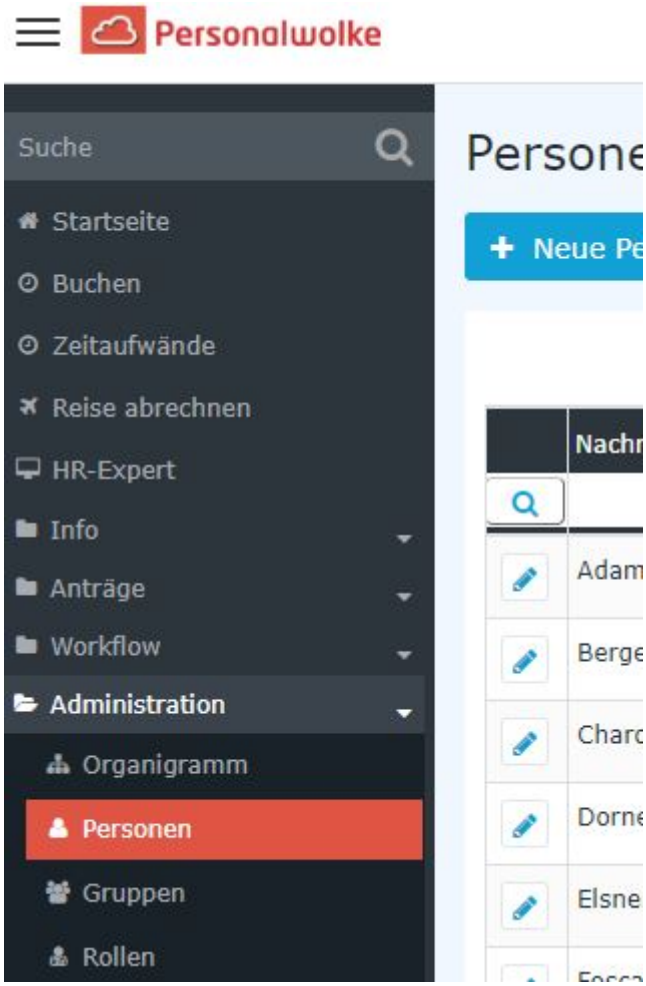
Step 2: "Roles" tab [2]

Step 3: Add a new role[3]

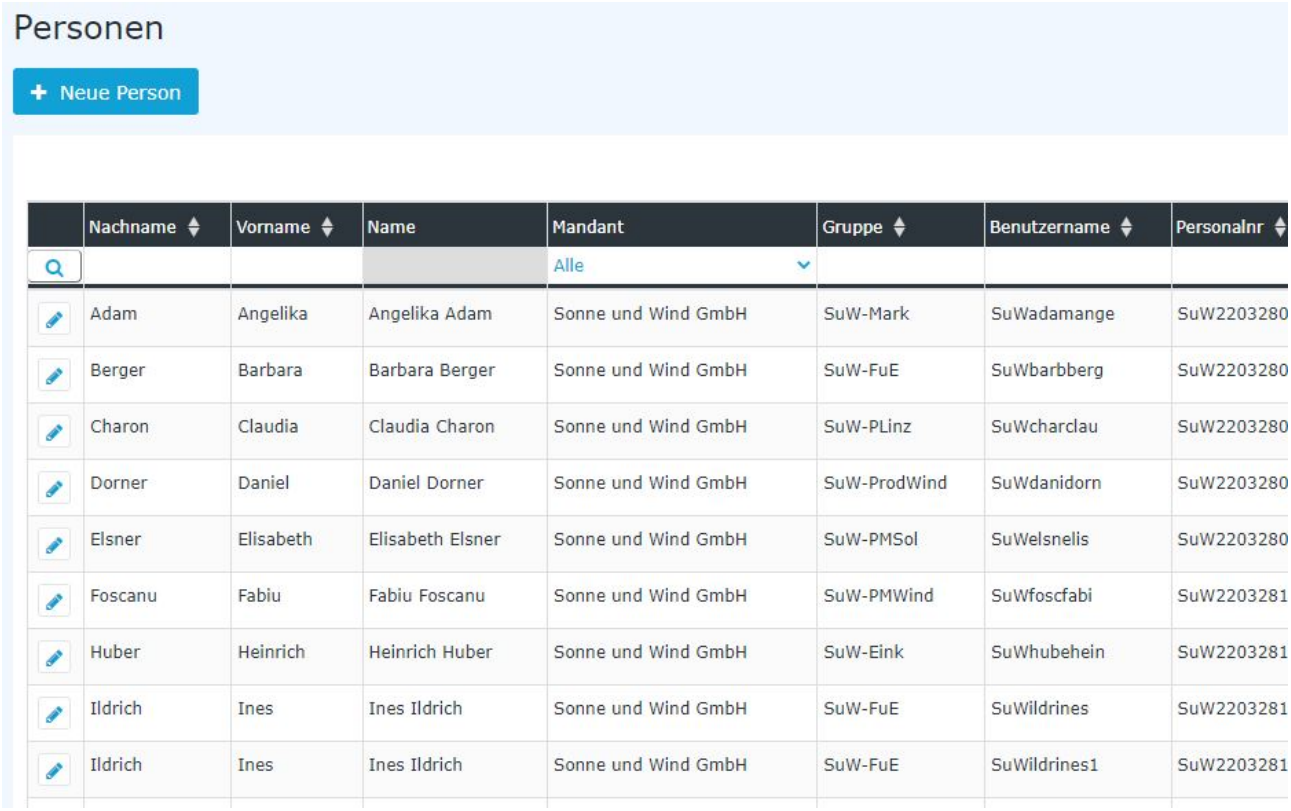
Editing and deleting a role[4]

Step 1: Select a person

In the menu tree under **Administration**, select the item "Persons".

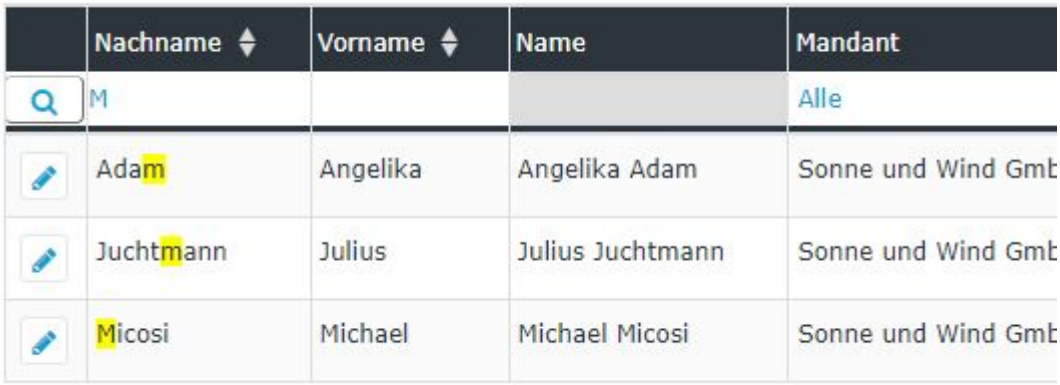


This menu item provides a list of all created persons (employees) of the client (company).



Using the input fields under **Last Name, First Name, Client, Group, Username, Employee ID, E-mail, TA-ID, Active User** and **Valid from**, the list can be restricted accordingly.

For example, by entering "M" in the Last name field, the list can be restricted to persons whose last name contains at least one "M".



To edit the desired person, simply click in the line or on the edit symbol.



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Step 2: "Roles" tab

To do this, click the "Roles" tab in the profile view of the person to whom the role is to be added.

Here you can view existing role assignments, and also historical assignments by using the **"with history" checkbox**.

The following fields are displayed:

Name: the name of the role

Competence target: the area of responsibility this employee has in exercising their role. This can be a single person or several, one group or several, or the entire client. A mix of persons and groups is also possible.

Inherited from: if the entire group an employee belongs to has been assigned a role, every employee in this group automatically holds the role as well. The role is thus "inherited" from the group by the employee.

Valid from/Valid to: time limit of the assignment

Sequence

> NOTIZ
> 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.

Sequence 1: this role holder receives the workflow tasks first
Sequence 2: receives the workflow tasks second (as deputy)
Sequence 3: receives the workflow tasks third, and so on.

In principle, an unlimited number of role holders can be defined for this sequence.
It is also possible to give two or more role holders the same position in the sequence, e.g., to appoint two deputies for one supervisor.

It is also possible to combine assignments in the sequence to groups as well as 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.

Step 3: Add a new role

Please click the "New role holder" button,

which opens the input screen:

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

1. Role

You can select the role:

- by entering the full role name
- by entering the first letters and using autocomplete
- by clicking the three dots next to the input field, which opens the roles overview, and selecting from the list

2. 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.

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.
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.

You can find a summary on the topic of sequence under FAQ: Sequence/order of role holders[1].

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.

1. /daisy/webdesk-manual-admin/10035-dsy.html?language=4

Editing or deleting a role

Both are done in the "Roles" tab, in the list of existing roles for a person, using the icons in the row.

Clicking the edit icon

lets you change an existing assignment.

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

icon.