How To: Client management

As an administrator, you access the **client management** via the **menu tree** under:

MASTER DATA
--> Clients

Creating a new client

To create a **new client**, click the "**New client**" button in the button bar and fill in the "Name" and "Description" fields.

> NOTIZ
> The name of a client must be **unique** and may only be assigned once!

Then click **"Save & Close"** to return to the list of all clients, or click "Save" to continue editing the form.

- In the **"Options"** tab, general options such as company logo, time zones and other **self-explanatory settings** can be defined.
- Under the **"Prefixes"** tab, abbreviations must be assigned for short names, user names and personnel numbers.
- Through the "**License assignment**" tab, the client receives the valid licenses for the desired Webdesk functions.

The action can be interrupted at any time with the **"Back"** button.

Editing an existing client

The filterable and sortable data table shows all clients stored in the system.
Clicking the **edit icon**



takes you to the **detail view** of the selected client. In addition to the editable features already mentioned, you can manage the client's permission for certain actions (=functions) or delete them here, and make client-related settings for the individual Webdesk modules.

"Actions" tab

Under **Actions** you will find a complete **list of all Webdesk functions** that are currently **enabled** for the respective client. Here you can add new **action permissions** as well as **delete** or **edit** existing permissions of the client. More on this under: How To: Authorization control[1].

"Modules" tab

Here you will find **specific settings** that affect the most important **system parameters** of the respective Webdesk modules with regard to the entire client. These are presented here in a user-friendly way as **"quick settings"**. For the **full configuration scope**, see the admin area of the respective modules.

Depending on your Webdesk configuration, not all modules may be visible.

Groupware	General approval for connecting external groupware, connection configuration test
Human resources	Extensive settings for events in human resources
Password Quality	Settings for password quality, change interval, password rules

Payroll services	Settings regarding the payroll service
Project time	Customization of the project time recording module
Time recording	Settings for time recording, weekly working time and specific time models, e.g. flat-rate overtime
Workflow	Settings and display options for managing the "Workflow" module
HRd options	Quick settings for the HR Development module

Felder

Name	Wert
Modul	Portal & Organisation (po)
Webdesk Actionname	po_editClient
Artefakt-Typ	Action

1. /daisy/webdesk-manual-admin/5479-dsy.html?language=4