New Features Webdesk EWP 3.2

Displaying Loose Groups in Management Lists (Selection Organization Chart)

In the selection organization chart (in the management lists), loose groups or cost centers can now also be displayed.

For loose groups (cost centers, project groups) to be displayed in the organization chart, the view permission must be set for the entire client.

Restrictions of the Selection Tree (Configuration by Administrator)

Possible restrictions in the query by restricting the selection tree (selection organization chart):

- **Maximum number of groups**
  Specifies the maximum number of groups that may be queried.
  If, for example, 5 is entered here, a maximum of 5 groups are displayed in the result.
- **Maximum number of persons** that may be queried
  Specifies the maximum number of persons that may be queried.

  NOTIZ

  If more groups or persons are queried than defined in the maximum number, a system notice appears stating that the selection should be adjusted accordingly.

- **Do not display the following organizational structure**
  With this parameter, certain groups can be hidden in the selection organization chart:
  - If you click the first icon > org structures can be added > select org structure from selection
  - To add a new group > click the second icon > select group from selection
  - To remove an existing (hidden) group again > activate the delete checkbox, then click the delete icon below.

Parameter "Consider selection in search" in Search Mask

This parameter only has an effect if a person (name) is entered in the search field. If this parameter is activated, the organization chart (selected groups) is searched for this person. Otherwise, all groups for which you have view permission are searched.

Query Limitation by Date in Search Mask (Configuration by Administrator)

- **Number of displayed requests**
  Defines the number of displayed months
- **Offset** (how many entries should be in the past)
  Defines the number of months to be displayed in the past
  - If, for example, 12 is defined for the number of displayed requests and 6 for the offset > entries 6 months in the past and 6 months in the future are displayed
- **Fixed date**
  Query for a fixed period > setting with the earliest and latest query date (e.g. 01.01.2006-01.01.2020 > shows all entries in this period, but none from the year 2005 or after the year 2020 > a system notice appears stating that queries outside this period are not permitted)

If no fixed date is defined, the query can be defined as follows:

- earliest query year (relative to now) 0-10
- earliest query month (relative to now) 0-12
- latest query year (relative to now) 0-10
- latest query month (relative to now) 0-12

Parameter "Show result immediately" in Search Mask

If this parameter is activated, clicking the menu item immediately displays the query result with the selection criteria of the last query, without first showing the search mask. To redefine the selection criteria > click "Show search mask".

Display of Levels in the Selection Tree Is Adjustable in the Search Mask (Depth 1-3, Minimize)

In the organization chart, subgroups can now be displayed by clicking the **green arrow** (without having to click each subgroup individually).

- Select **depth 1 - 3**, then click the green arrow.
  With **depth 1**, the organization chart is expanded to level 1. With **depth 2**, the sublevel is expanded as well, with depth 3 all further sublevels are expanded, and so on. If you click "**All**", all existing groups and subgroups are displayed.

With the **blue arrow**, the tree is minimized again (all groups and subgroups are collapsed again); only the parent groups are displayed.

Display of Selected Groups and Persons in the Search Mask

If you click the "**Show details**" icon (located to the right of the green arrow), all groups that are checked are displayed. This parameter provides an overview of selected groups without having to expand the org tree.

The Selection in the Organization Chart Is Saved with a Query (Search Mask)

The **selection criteria** in the org tree (organizational structure) are saved and automatically restored the next time it is opened. That is, the same groups or persons are checked that were selected in the last query.

Small Booking Screen

In addition to the standalone booking screen, it is also possible to display the "**Small booking screen**".
This booking screen is used exclusively for making bookings; no further information is displayed.

When the user clicks the "**Clock in**" button, the booking is made and the display changes to "**Clock out**":

To get this display, the following call should be made:

http://localhost:8080/webdesk3/ta_doBooking.cact?layouttemplate=blankTemplate&displayMiniatur=true

where the parameter "**displayminiatur=true**" enables this display mode.

The additional parameter "**layouttemplate=blankTemplate**" should always be specified in order to omit all other Webdesk elements (menu tree, headers, etc.).

Search Mask > Expanded and Collapsed Group Displays Are Now Saved

Just like the saved groups of the last query, the system remembers how deep the organization chart was expanded.

Attendance Board > Display of the Time

The attendance board now shows the current time in the title bar next to the date as well:

Attendance Board > Absence Reason Is Shown on Status ("mouse over")

If you move the mouse ("mouse over") over the status icon, an explanation is displayed (e.g. Present, Absent, Official errand, etc.)

Calendar Overview > Hiding Certain Absence Reasons (Configuration by Administrator)

If you want to prevent certain absence reasons from being displayed in the calendar (e.g. official errand, illness, etc.), this is configured in the configuration details (Configuration/Action Calendar):

- Click Add > select absence reason > Save.
  If multiple absence reasons should not be displayed in the calendar, click Add in between.
  The **absence reasons** selected here are then **not displayed in the calendar**.
- To make absence reasons visible again > check the Delete button > click the Delete button > Save.

Statistics > Column Total per Account

If only **one account** is queried in a statistic, a **column total** is output automatically. When querying multiple accounts, no column total is output for logical reasons.

Lists > Favorites Function Added

With the **"Favorites"** parameter, each user can create their own favorites list. This list can contain the persons you need most often, or any employees.

- To **add a person to the list** > click the right arrow > select person > click the **Add** button
- The order of the persons on the favorites list can be changed at any time using the arrow keys
- To **remove a person from the favorites list**, click the red delete icon > Save

Time Correction > Jumping to Time Correction from the Monthly Journal via Context Menu Is Now Possible

If a context menu is configured in the corresponding process, such as a context menu for the monthly journal in the Time Correction process, these 2 actions are "linked" with each other. You can jump directly from the monthly journal to a time correction request or to other requests (e.g. absence).
For the user, this looks as follows:

The monthly journal context menu is configured in the **process > Context menu tab**:

Changes in the Workflow Lists

Workflow Lists > Column with the History Can Be Shown or Hidden

In the workflow lists, it is now possible to hide the column with the workflow history (by clicking the "**History off**" button). If the column with the history is hidden and you want to make it visible again > click "**History on**"

The "Details of a Request" Link Was Added

Clicking the "Details" button opens the detail view of the request.

"Open form" (Requests Are Opened with the Edit Permission of the Person Who Opens the Request Details)

- Workflow list > Request > Details
- Clicking the "**Open form**" button opens requests with the edit permission of the person who opens the request details.

Printing Workflow Lists Is Possible (16755)

The workflow lists can now be printed using the "Print icon" (far right in the title bar).

Search by Requester in the Workflow Lists (17609)

In the workflow lists, it is now possible to search specifically for requests from a particular **requester**:

- Select requester from the list > Refresh > only requests from the selected requester are searched for.

Changes in Requests / Processes

Collective Time Correction

With the "**Collective time correction**" form, multiple time corrections (also for multiple days with different dates) can be made at once. Unlike the normal time correction, corrections for several different days can be entered at once here. This saves you from opening and filling in the time correction multiple times. For a detailed description of the configuration, see the Admin Manual.

New: Parameter "Allow requests on behalf of others"/"Request for someone other than switch user?" (Configuration by Administrator)

- **Allow requests on behalf of someone else?**

This parameter allows requests to be created for other person(s), e.g. for a colleague from the department. The request is created for another person, but remains in the area (open requests, open tasks) of the requester.

- **Request for someone other than switch user?**
  The request is created for another person and also moves into the request/task area of the person on whose behalf it was created.

New in Process Definitions > General Tab (Configuration by Administrator)

For a better overview of the process parameters, a new "General" tab was designed. It now contains all general parameters that affect the process and that were previously found in the upper area of the process definition.

- **Automatically approve/review**
  This parameter is useful if a role holder appears multiple times in the process flow > if the parameter is activated, the first decision in the process flow is automatically adopted
- **Inform author**
  Here you can choose whether the author should be informed. The following options are available:
  - Never: Author is never informed (regardless of whether the request was approved or rejected)
  - Always: Author is always informed (regardless of whether the request was approved or rejected)
  - On approval : Author is only informed when the request is approved
  - On rejection: Author is only informed when the request is rejected
- **Comment/description required?**
  - **Yes**: a description must be entered when submitting a request, since otherwise the request cannot be saved (error message)
  - **No**: entering the description is optional
- **Not deletable by author**
  If the checkbox is activated, the process author cannot delete the request. This parameter is relevant for requests created automatically (e.g. by a job)
- **Suppress email notification**
  If the checkbox is activated, no email notification is sent
- **Do not show in to-do list**
  Mainly concerns the "Transfer booking" process - if the checkbox is activated, the request is displayed in a separate menu item (the position in the menu tree can be chosen freely); if the checkbox is not activated, the request is displayed in the to-do list (menu item Assigned requests/open tasks)
- **Allow requests on behalf of someone else?**
  This parameter allows requests to be created for other person(s), e.g. for a colleague from the department. The request is created for another person, but remains in the area (open requests, open tasks) of the requester
- **Request for someone other than switch user?**
  The request is created for another person and also moves into the request/task area of the person on whose behalf it was created
- **Automatic action**
  Possible selection of "forward automatically"
  - after x days: Action is forwarded after the specified period of x days
  - This action on the General tab refers to requests that are saved as a draft by the requester. When the period has expired, the request is forwarded to the next person in the process. After that, only automatic actions assigned to the workflow steps are taken into account
- **Not manually forwardable**

Request cannot be forwarded manually.

System Parameter "allowUserDeputy" (Administrator)

This parameter can be found in the **system parameters**. If it is set to **true**, the **deputy function** is **activated** for users; it can be found in the user's settings.

For the user, it can look as follows, for example:

Parameter "hideContextMenu" Added (Administrator)

In the system parameters (poOptions), this parameter means that the context menu can no longer be opened by right-clicking (workflow lists, management lists)

Parameter "useRecordTransformerForOrgLists" (Administrator)

This parameter should be set to **true**, since this improves the speed when querying all lists and views in which the organization chart is queried.

Parameter "switchUserActsAsNominalUser" (Administrator)

This parameter can also be found in the system parameters. If it is set to true, the switched user is treated like the original requester.

Assigning Tasks to Other Persons ("Reassign")

The **administrator** can now assign a request in the "Open tasks" workflow list to a person other than the one provided in the history.

- Click the "**Reassign**" button > select new processor from the list > click Reassign

Hiding Absence Reasons in the Follow-up Absence Reason and Absence Reason Forms (Configuration by Administrator)

If only **one absence reason** is specified in the absence or follow-up absence reason requests (e.g. for the sick leave notification > absence reason "sick"), it can be hidden in the request form. By checking the parameter "**Suppress display of absence reason**", this absence reason is automatically included in the request; the user does not have to click it anymore. The configuration for this is done in the process definitions > Settings tab:

For the user, the request can look like this, for example:

If the parameter is not checked, the user must select the absence reason.

Correction Notes Can Now Be Extended with Any Text (17192) (Configuration by Administrator)

The parameter **"Optional correction note text"** (e.g. for absence and follow-up absence reason processes) makes it possible to filter for special events using IF6020 evaluation mechanisms. In this case, a statistic is created showing how many persons were reported healthy or sick on that day.

New: Parameter "Supplement to target time" Can Now Be Set by the User (Absence/Vacation Request)

If the user checks the parameter, the daily absence is supplemented to the target time.

New for Transfer Booking

The comment per workflow step in the account correction requests shows which value was saved by the processor.

Searching the Attendance Board via Link Parameter

The attendance board now accepts the optional parameter "searchFor". The value passed here is then adopted into the search field. An asterisk can also be specified at the end as a wildcard.
The search logic is analogous to the search in the "Search" field, i.e. the fields "Last name" and "First name" are searched.

If there is a match, the corresponding entry (possibly several) is displayed immediately.

Call:

The entire URL must always be called.

Note: only useful in combination with SSO.

http://webdeskserver/webdesk3/ ta_getAttendanceTableau.cact?searchFor=May*