Roles

Definitions of terms

This page describes the basic terms relating to roles. You can find information on editing roles under "Create and edit role assignments[1]".

Role

A **role** describes a specific **function** within a company (supervisor, personnel).
A role in Personalwolke essentially serves 2 functions:

- On the one hand, access permissions for individual program functions are implemented via roles
- On the other hand, they fulfill certain functions in the workflow process (e.g., supervisor: approving vacation requests, personnel: reviewing sick notes)

Personalwolke has 2 predefined roles that can be assigned to individual persons or groups:

Supervisor and Personnel

Supervisor

- As the name suggests, this role is used to grant a person or group certain extended rights to approve or reject requests submitted by employees (vacation, doctor, time off in lieu, etc.).
- The "Supervisor" function relates to the organizational unit/group

Personnel

- This role helps with reporting on employees. Various reports can be created on different topics (accounts, sick days, vacations, statistics, attendance, etc.)
- The Personnel function relates to the members of permission groups, especially to all employees (XXX-ALLE)
- The Personnel role is a **prerequisite for using the menu item Time management/Correction client**. Only this role can change bookings here, so at least one employee per company must be given this role!

The **role is assigned** either via the role itself, via the person master data sheet[2] or via a group[3], see the chapter Create and edit role assignments[4].

The role also fulfills certain functions in the process flow (requests). Here the role holder can perform defined activities, such as approving, rejecting or reviewing a request (see open tasks[5]).

In contrast to organizational structures (organizational units, permission groups), a role **cannot be used in reports** in Personalwolke Time or HR-Expert. This means that no information functions of a role can be taken into account when querying information. To make this possible, the role holders would have to be combined in a permission group (e.g., a permission group Supervisors to which all holders of the role Supervisor are added).

Competence target

A **competence target** is understood as a person or group for which the role holder is responsible or which they may view.

There are 3 options here: specific PERSON(s), specific GROUP(s) (both organizational units and permission groups) or CLIENT. Several competence targets can be assigned at the same time, see Create and edit role assignments[6]

Deputy

In the workflow, the term deputy is not used in the hierarchical sense, but refers to the permission an employee receives from another employee to process that employee's workflow tasks.

Two steps are required for this:

1. The person who is to act as deputy must have been assigned number 2 in the sequence in the role assignment
2. The person who wants to be represented by another must activate approval by the deputy in the settings, see "Settings[7]"

The role assignment is described in Create and edit role assignments[8].

The deputy's permission is set in the settings under "Deputy" and is described under "Settings[9]".

Role badges

Role badges make it easier to recognize certain roles in the persons overview

The following roles are marked by badges:

- Supervisor
- Personnel
- Travel expense review

The badges appear automatically in the persons overview as soon as an employee has received or inherited a role[10]. They cannot be changed.

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Name	Wert
Modul	Time & Attendance (ta)
Webdesk Actionname	showRoles
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1. /daisy/webdesk-manual-admin/9793-dsy.html?language=4
2. /daisy/webdesk-manual-admin/5946-dsy.html?language=4
3. /daisy/webdesk-manual-admin/5998-dsy.html?language=4
4. /daisy/webdesk-manual-admin/9793-dsy.html?language=4
5. /daisy/webdesk-manual-admin/5877-dsy.html?language=4
6. /daisy/webdesk-manual-admin/9793-dsy.html?language=4
7. /daisy/webdesk-manual-admin/5889-dsy.html?language=4
8. /daisy/webdesk-manual-admin/9793-dsy.html?language=4
9. /daisy/webdesk-manual-admin/5889-dsy.html?language=4
10. /daisy/webdesk-manual-admin/5886-dsy.html?language=4