User Settings

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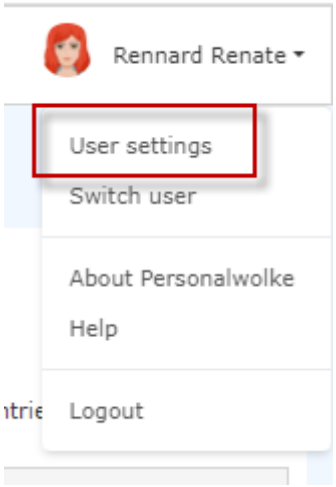
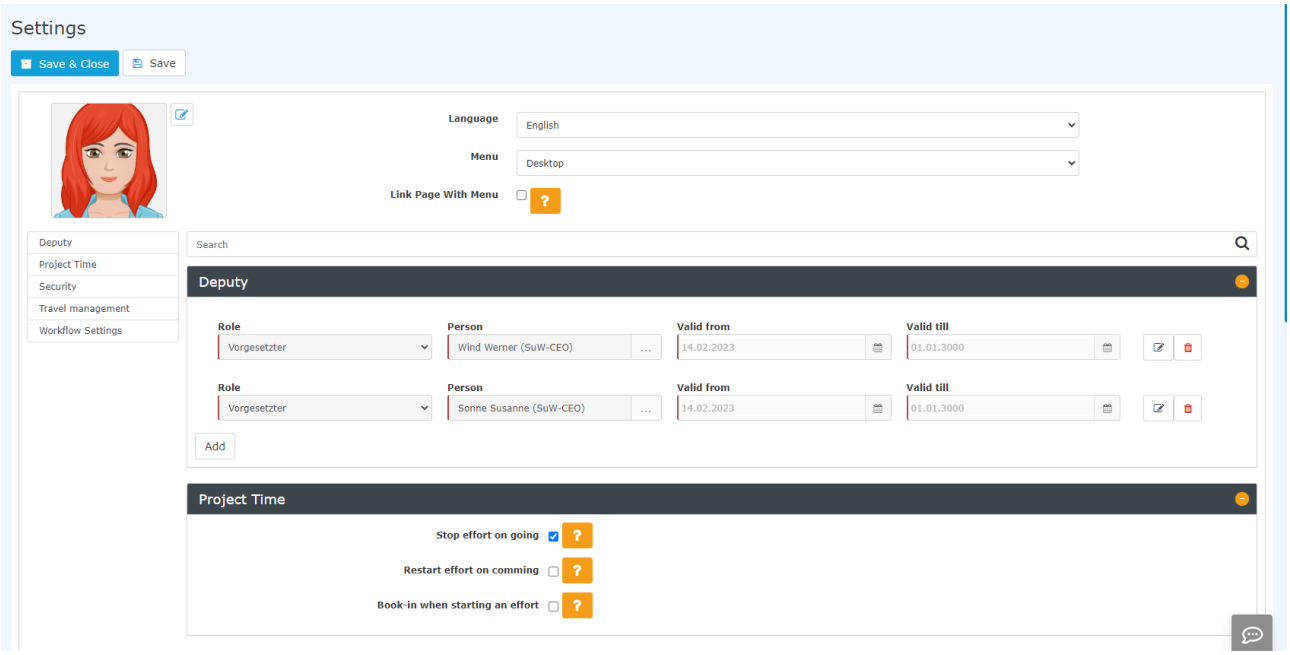
Overview

The "User settings" page gives every employee the option to define basic settings for various areas in Personalwolke or in connection with their workflow tasks.

Path to the "User settings" page:



You can find the user settings by clicking on your profile picture/avatar or your name in the top right corner of the view.
In the selection window that pops up, please click "Settings".
The profile view "User settings" then opens.



Menu settings

User picture/avatar:

By clicking the edit icon next to the default avatar image, you can upload an individual user picture in the common image formats.

Language

You can choose between German and English. A change takes effect as soon as you click "Save and close" or "Save".

(Please note that, due to the program, German terms are sometimes used in the English version as well.)

If you do not select a language, Personalwolke is displayed in the language you have selected for the device you are working on.

Menu

The following options are available:

- Dynamic: the display adapts automatically to the device type
- Mobile: the display designed for mobile devices
- Desktop: the display designed for desktop devices/browsers

Link page with menu

By clicking this checkbox, the menu tree on the left side of the page automatically shows where the currently open page is located.
In practice, if you are redirected by a task to a page other than the start page, for example, you can see exactly where you are. If, for example, the approval of a vacation is displayed to you as a task, Workflow/ Open requests is highlighted in bold in the menu tree.

This link is recommended if you frequently have to handle various administrative tasks in the system as part of your work.

Deputy

NOTIZ

The term "deputy" here refers to a
- temporary
- substitution not defined as a role
for absences (vacation, sick leave, etc.) with regard to handling requests and workflows.

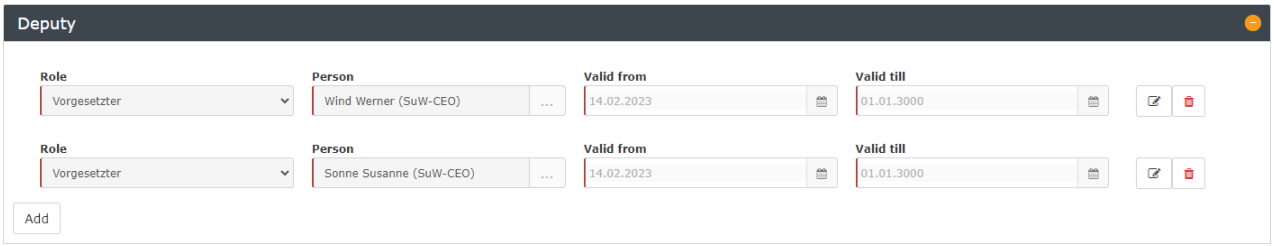
A deputy can only be added for a role that you hold yourself.

It is possible to appoint one deputy for several roles or several deputies for the different roles.

A deputy entered here can perform your tasks in Personalwolke for a precisely defined period of time.

For the specified period, this person has the authority you selected and, depending on the assigned role, can approve requests on your behalf.

If you want a permanent substitute in your role, this must be done via Administration/Create and edit role assignments[8].



The following steps are required to enter a deputy:

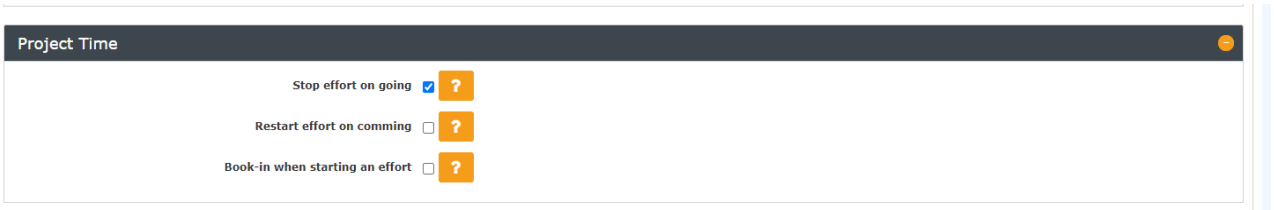
1. Click "Add"
2. Under "Role", one of the roles you hold is entered by default, which means at least the role of Time Professional user.
   However, you can also select a different role from the dropdown list.
3. Under "Person", an employee can be selected as the deputy:
4. Valid from/Valid until: enter the time frame in which the substitution is to take place.

You can edit or delete an entry using the
icons and

Project time

NOTIZ

This section appears if your company uses Personalwolke Project-Time or projects as such.

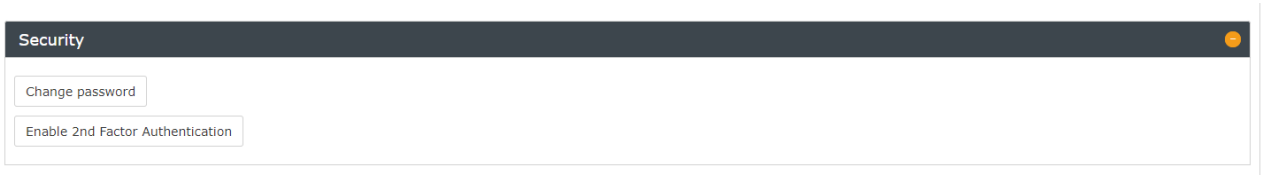


Three checkboxes are available here.

- **Stop booking when leaving** (activated by default): a running project time booking is automatically ended by the "Leave" booking. This requires a system administrator to have configured and activated a corresponding job in Webdesk.

- **Restart booking when arriving**: With an "Arrive" booking, a project time booking is automatically started as well. This newly created project time booking automatically takes over all data from the most recently ended project time booking of the same day or, if there was none on that day, from the previous working day. This requires a system administrator to have configured and activated a corresponding job in Webdesk.
- **Clock in when starting an effort**: automatically clocks you in as "present" in time tracking as soon as the entry of a project effort is started and you were absent beforehand. Only efforts that begin at the current time lead to such a clock-in in time tracking; efforts with a start time in the past or future do not.

Security



In the Security section, you can initiate a password change[9] and activate two-factor authentication.

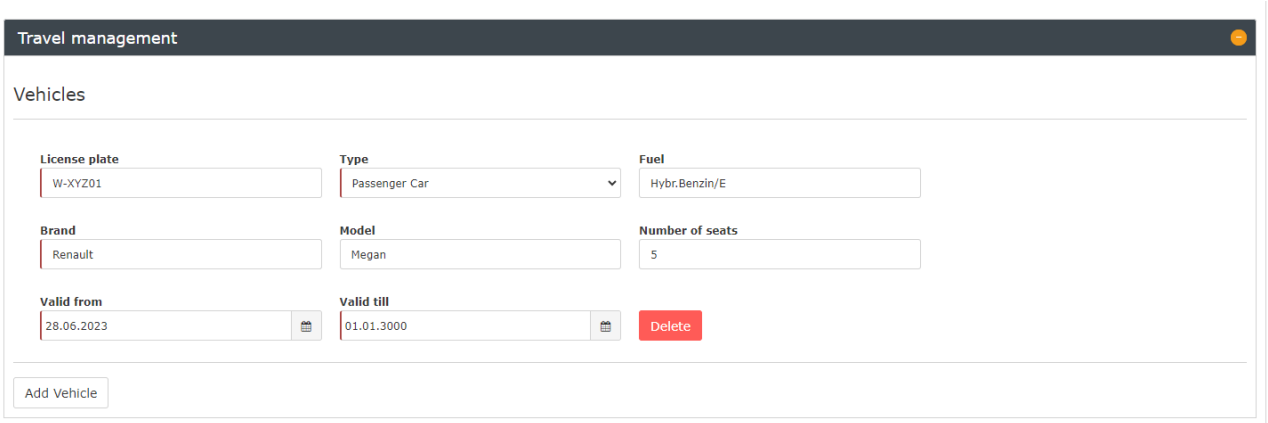
You can find all further information on this under Password[10].

Information on the topic of passwords from the admin perspective can be found under Assign and change password (admin side)[11]

Travel

NOTIZ

This section appears if your company uses Personalwolke Travel.



This section is used to enter and edit motor vehicles (company cars) assigned to you. You can create several vehicles per person.

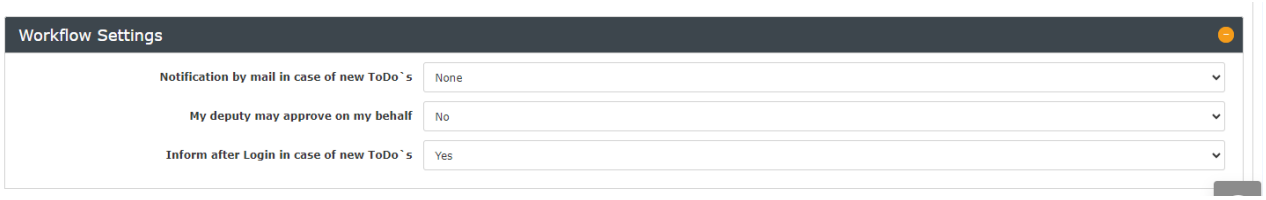
Click "Add" to open the input fields.

The following data can be entered:

- License plate
- Type (the standard choice is between car and motorcycle)
- Fuel
- Make
- Model

- Number of seats
- Valid from/Valid until

Workflow settings



The following fields can be used here**:**

In case of new tasks, I want to receive an email notification

Options

- **None**: The employee does not receive any notifications by e-mail
- **For every new task**: The employee receives an e-mail from Personalwolke for every new task.
- **Summary of open tasks once per day**: The employee receives a list of all open tasks every day.

My deputy may approve on my behalf

> NOTIZ
> Attention: here the term "deputy" refers to the role setting, not to an absence substitution!

- Yes: My deputy may approve on my behalf
- No: My deputy may not approve and does not receive a workflow either

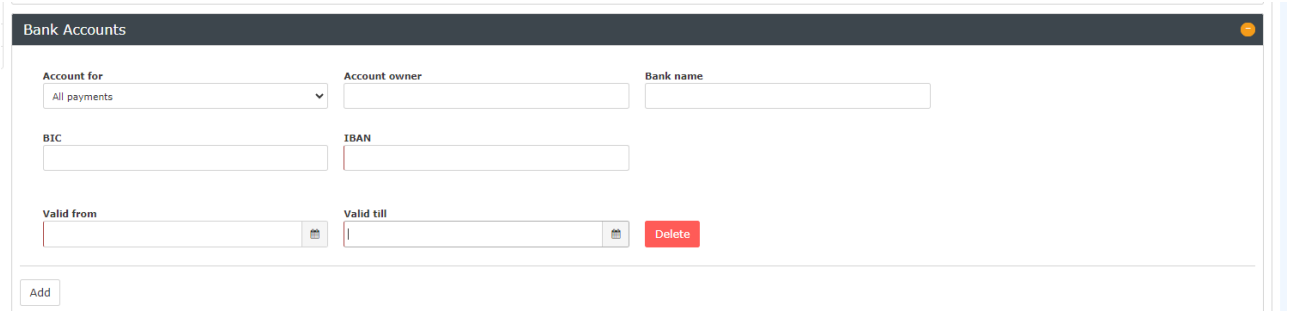
This parameter affects all requests submitted from the time of activation. In addition to the role holder, all downstream role holders (provided they are deputies according to the deputy rules) are entered as deputies in the requests. In this context, the inheritance direction within the role must currently also be taken into account. If the inheritance direction is set to "up", the org chart is searched upward for deputies; if set to "down", it is searched downward; and if set to "none", it is not searched at all.

In case of open tasks, I want to be notified when I log in

- Yes: When you log in to Personalwolke, a pop-up showing the number of open tasks is displayed.
- No: No pop-up appears

Bank accounts

Here you can manage your own bank account.



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Name	Wert
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Webdesk Actionname	getUserSetup
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1. /daisy/webdesk-manual-admin/9793-dsy.html?language=4
2. /daisy/webdesk-manual-admin/9806-dsy.html?language=4
3. /daisy/webdesk-manual-admin/10089-dsy.html?language=4
4. /daisy/webdesk-manual-admin/6350-dsy.html?language=4