Persons - Overview

Overview

- General[1]
- Person master data sheet[2]
  - Extension for HR-Expert users[3]
- Sorting / search options[4]
- Practical functions[5]

General

Under the menu item **Persons** you will find an overview of all persons (employees) created for your client (company).

The list contains the following columns

- **Last name** - the person's last name
- **First name** - the person's first name
- **Name** - combination of last name and first name
- **Client** - the company the person is assigned to
- **Group** - the group (department, organizational unit) the person is assigned to (e.g., support, personnel, management, quality assurance, etc.)
- **Username** - the username (including the fixed prefix pb) for logging in to the Personalwolke portal
- **Employee number** - the freely chosen employee number including the fixed company-specific prefix (in this case: 0001)
- **TA-ID** - an ID for time tracking assigned automatically by the system (cannot be changed)
- **Active user**
  - Yes --> the person can log in to the Personalwolke portal
  - No --> the person can NOT log in to the Personalwolke portal, but can still be included in reports

In addition, certain **role holders** are identified in this list by colored **badges** so that they are easier to recognize.
In the example above, these are the badges for personnel (red) and for travel expense review (yellow).
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[6]. They cannot be changed.

Person master data sheet

Clicking a row or the edit icon takes you to the person master data sheet, where data concerning the employee can be changed / the employee can be deleted. An explanation of the individual fields and tabs can be found under "Create new person[7]".

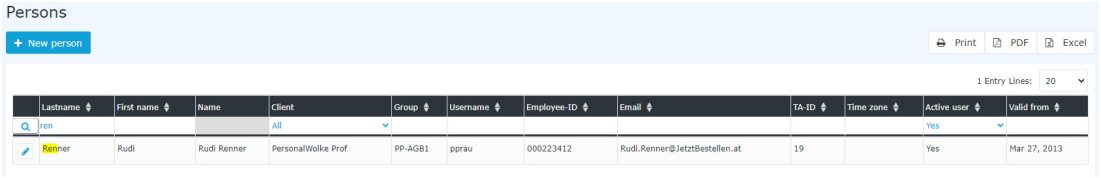
Extension for HR-Expert users

If you also have the HR-Expert[8] program extension, you can switch directly from the person master data sheet to HR-Expert to make changes there.
You will find a corresponding "Edit in HR-Expert" button at the top of the view:

Sorting / search options

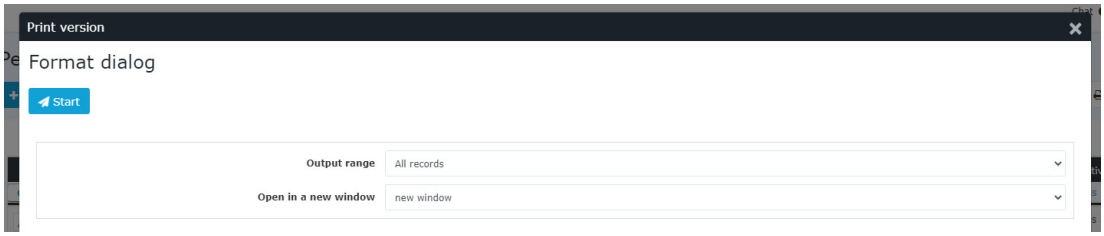
This list can be sorted freely in ascending or descending order, using the triangles, by various criteria (last name, first name, group, username, employee number, TA-ID, active, valid from).

In addition, the white text fields at the beginning of the list let you restrict the displayed records by various criteria, e.g., last name "ren" shows only persons whose last names contain "ren" (enter ren in the text field and start the search with Enter / the Return key / by clicking the magnifying glass icon). To make all records visible again, simply delete the search term from the corresponding field and press Enter again or click the magnifying glass icon.



Practical functions

Clicking one of the 3 icons (Print, PDF, Excel) in the upper right area opens the following dialog box, where you can specify in more detail the data to be displayed in the selected medium (Print, PDF, Excel):



Output range

- ***All records***
  All employees of the company are displayed in the selected output medium.
- ***Current selection***
  Only the currently displayed employees of the company are displayed in the selected output medium

Open in new window

- ***New window***
  The selected records are displayed in a new window
- ***Current window***
  The selected records are displayed in the current window

This function is also handy if you want to export a list of employees, possibly filtered by various criteria. The Excel format is a good fit for this.

1. /daisy/webdesk-manual-admin/5886-dsy.html?language=4

2. /daisy/webdesk-manual-admin/9835-dsy.html?language=4
3. /daisy/webdesk-manual-admin/7737-dsy.html?language=4