# Overview

## General information

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



**Last name** - the person's last name
**First name** - the person's first name
**Name** - combination of surname and first name
**Client** - the company the person is assigned to
**Group** - the group (department, organizational unit) to which the person is assigned (e.g. support, personnel, management, quality assurance, etc.).
**Username** - the username (incl. fixed prefix pb) for the login to the webdesk portal.
**Personnel number** - the user-defined personnel number including the company-specific prefix (in this case: 0001).
**TA-ID** - an ID automatically assigned by the system for time recording (cannot be changed)
**Active user**
Yes --> the person can log in to the Webdesk Portal
No --> the person can NOT log in to the Webdesk Portal, but is still evaluable

## Person master data sheet

A click on a line or on the edit

symbol                                                                                     take

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 (tabs) can be found under New Person[1].

## Sorting / Search options

This list can be sorted in ascending or descending order using the blue triangles
(  )
and according to various criteria (last name, first name, group, user name, personnel number, TA-ID, active, valid from).

In addition, the white text fields at the beginning of the list offer the possibility to restrict the displayed data records according to various criteria, e.g.: Last name "gs" shows only persons whose last names contain "gs" (enter gs in the text field and start search with Enter / Enter key /

click  ).
To make all records visible again, simply delete the search term from the corresponding
field and
press Enter again.

## Practical funktions

By clicking one of the 3

icons  in
the upper right area, the following dialog box opens to specify the data to be displayed in the selected medium (print, PDF, Excel):

**Output range**

- *All Records*

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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 data sets are displayed in a new window.

- *current window*
  The selected datasets are displayed in the current window.

This function is also useful if you want to export a list of employees, possibly filtered according to various criteria. The Excel format is ideal for this.

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1. /daisy/webdesk-manual-admin/5928-dsy.html?language=4