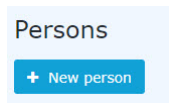
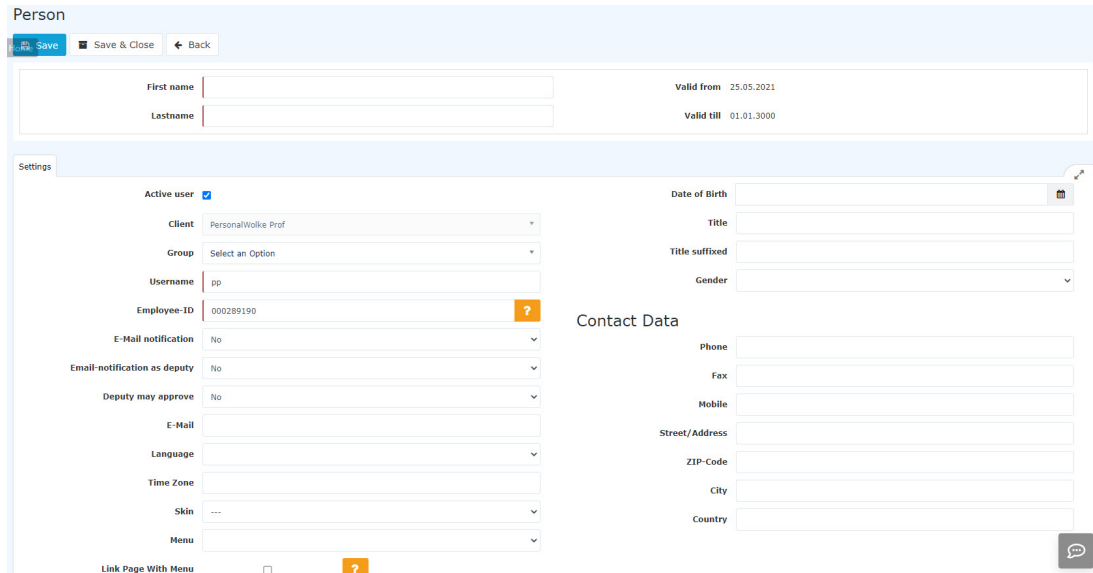


## General

A click on "New person" starts the process for creating a new employee.



The following input mask then opens:



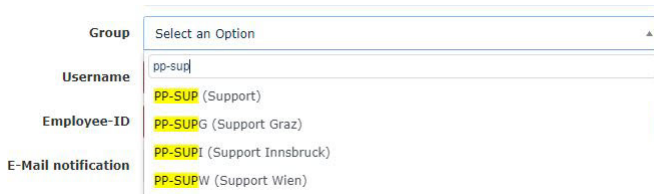
The screenshot shows the 'Person' input mask form. It includes fields for 'First name', 'Lastname', 'Valid from' (25.05.2021), and 'Valid till' (01.01.3000). Below these are 'Settings' and 'Contact Data' sections. The 'Settings' section has fields for 'Active user' (checked), 'Client' (PersonalWolke Prof), 'Group' (Select an Option), 'Username' (pp), 'Employee-ID' (000289190), 'E-Mail notification' (No), 'Email-notification as deputy' (No), 'Deputy may approve' (No), 'E-Mail', 'Language', 'Time Zone', 'Skin' (---), and 'Menu'. The 'Contact Data' section has fields for 'Date of Birth', 'Title', 'Title suffixed', 'Gender', 'Phone', 'Fax', 'Mobile', 'Street/Address', 'ZIP-Code', 'City', and 'Country'. Red lines are drawn around the 'First name', 'Lastname', 'Client', and 'Group' fields. A red question mark icon is next to the 'Employee-ID' field.

The fields marked with a red line must be filled in while the unmarked fields are optional.

After entering your **first name** and **surname**, you have to select your company under **Client** and then a **group** to which the person should belong.

### WARNUNG

Note: In principle, the required hierarchical [groups](#)<sup>1</sup> (departments) should be created BEFORE persons are created, since a new employee must be assigned directly!



The screenshot shows the 'Group' dropdown menu. The 'Group' field is set to 'Select an Option'. Below it, the 'Username' field is 'pp-sup'. The 'Employee-ID' field is 'pp-SUP (Support)'. The 'E-Mail notification' field is 'pp-SUPG (Support Graz)'. The 'E-Mail notification' field is 'pp-SUPI (Support Innsbruck)'. The 'E-Mail notification' field is 'pp-SUPW (Support Wien)'. The 'E-Mail notification' field is 'pp-SUPW (Support Wien)'.

### WARNUNG

Important: **After saving** the person, it **MUST** be **added** to at least the **loose group "xxx-ALLE"** under the newly appearing tab Groups (not visible before saving). **Otherwise no menu tree** is available to the user after the login!

After selecting the client, the fields **User name** and **Personnel** number are automatically filled with fixed client-specific prefixes (in this example, "pb" and "0001"). Except for these two prefixes, the **user name** and **personnel number** can be freely selected - but must be unique within the company.

Active user

Client PersonalWolke Prof

Group Select an Option

Username pp-1234

Employee-ID 000289190 ?

**ZEF Master record number** is automatically filled by the system and cannot be changed.

**E-mail notification** controls whether the user should receive an e-mail when new requests for approval / review are received.

**E-mail notification** as a deputy analogous to the point E-mail notification, only from the viewpoint of the deputy

**Activates / deactivates** the deputy regulation, i.e. the deputy is authorized / not authorized to approve proposals.

**E-mail** the e-mail address of the user to whom the notifications will be delivered.

As already mentioned, **the other fields** are optional and self-explanatory.

Once all fields have been filled in, the person can be created by clicking on **Save**. The successful saving is confirmed with a corresponding message (person 'Mustermann Max' was saved successfully!). Only **now** can the password for the user be reset to the default password (=user name) by clicking the **Reset password** button. This must be changed when the user logs in for the first time.

## Password-Management

**After saving** a person, the password of the user can be reset to the default password using **Reset Password**.

WARNUNG

Note: The **default password** corresponds to the **user name including prefix** (case sensitive!) and must be changed after the first login!

### Password management

Password defined

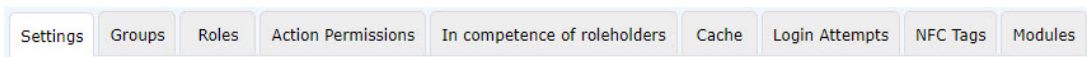
Last Password Creation time 09.12.2016 10:24

Reset Password

Reset 2nd factor Authentication

## People Management

After successful saving, the additional tabs **Groups**, **Roles**, **Action permissions**, **In the competence area** of these role owners and **Modules** appear.



### Tab: Groups

Under **Groups**, you can change the assignment to a hierarchical group (organization chart) and add the assignment to a lot group.

# Hierarchical Groups

Organigramm PP ▾

with History

New group		Valid from	Valid till	
Select an Option ▾				
Orgstructure	Name	Valid from	Valid till	Delete
Organigramm PP	PP-AGB1 (Geschäftsbereich 1)	06/07/2020	01/01/3000	<input type="checkbox"/>

Here you can see that the selected user is currently assigned to the group PB-AGB1 (Geschäftsbereich 1) in the organization chart PP. With **Valid from** and **Valid to**, you can define a period in which the person is assigned to a particular group. Under **New Group**, you can select another group and define a time period for the validity of the group membership. The check mark at **with past** determines whether expired (past) group memberships should also be displayed in the list of group memberships.

As an example: Mr. Müller works until 02.05.2013 in the PP-ENTW group and is to belong to the PP-AGB1 group from 03.05.2013. To realize this automatically, the Valid until date can already be changed to 02.05.2013 and the group PB-AGB1 with Valid from 03.05.2013 can be saved under new group. Thus the group change takes place automatically on the specified key date.

WARNUNG

Note: A person can only be a member of one hierarchical group at a time!

1. </daisy/webdesk-manual-admin/5884-dsy.html?language=4>