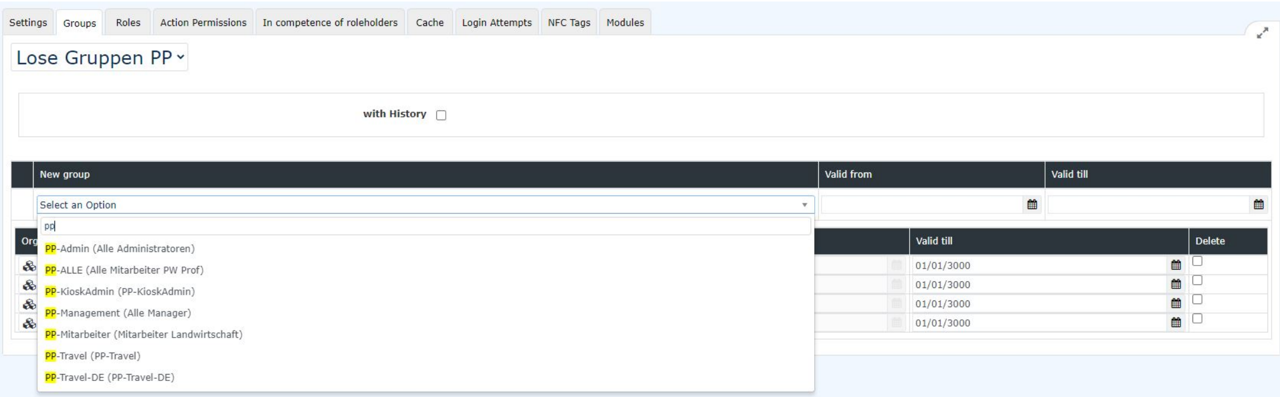
Personen_02_TimeBase_LoseGruppen_Rollen

Loose Groups

Under **Loose groups** you can define the affiliation to several non-hierarchical groups. The number of loose groups to which the employee can be assigned is unlimited.

> WARNUNG
>
> Note: The user must always be assigned to the loose group xx-ALLE - otherwise no menu tree is available after login!



(This screenshot shows the 3 standard loose groups. The new user must be assigned at least to the group xx-ALLE (PP-ALLE).)

> WARNUNG
>
> In order to offer the user **additional rights** (also in the Project-Time and Travel modules), he must also be added to one of the following loose groups!

Personalwolke Time:

PP-ALLE	PP-ALLE + PP-Management	PP-ALLE + PP-Admin
Standard-Group - every user MUST be assigned to this group!	Management-Group - users who are added to this group receive additional menu items for the evaluation of company employees - Accounts evaluation[1], Calendar overview[2], Yearly calendar[3] und Statistics[4].	Administrator-Group -Users added to this group get additional menu items for managing the Organigramms[5], People[6], Groups[7] and Roles[8], as well as the ability to Switch users[9] to view the Personalwolke from the perspective of the selected user.

Of course it is also possible to add a user to all loose groups and thus unlock the administration AND management menu items to the user or a simple standard user is created which is only added to the loose group PP-ALLE.

> WARNUNG
>
> The menu item Time management --> Correction client represents a special case. Only persons who have assigned the Personnel role can use this correction client (regardless of the loose groups to which they have been added) to change bookings. In some cases users can also use correction client for tracking time.

Personalwolke Travel

If you are a user of the "Travel" module, the following loose groups are also available for managing user rights:

PP-TM-User	PP-TM-Manager	PP-TM-Admin
• Apply for / account for trip (depending on the definition according to the furnishing workshop) • Info / My travels	• Management / Travel of my employees	• Administration / Travel Expenses / All Trips • Management / Travel of my employees

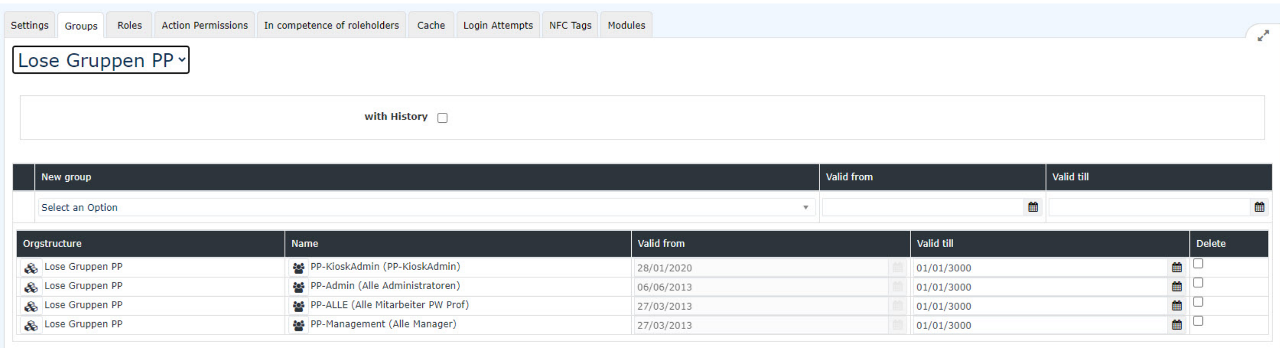
Personalwolke Project-Time

If you are a user of the "Project Time" module, the following loose groups are also available for managing user rights:

PP-PTM-Usr	PP-PTM-Mgm	PP-PTM-ProjMngr	PP-PTM-Admin
• Project time booking • Enter project time • Info / My project times	• Enter project time • Management / project times of my employees	• Management / Project expenses	• Enter project time • Administration / Project time / Projects • Management / project times of my employees

How to add user to a group

We select the **PP-ALLE** group and click Save. This assigns the employee to the loose group **PP-ALLE**.



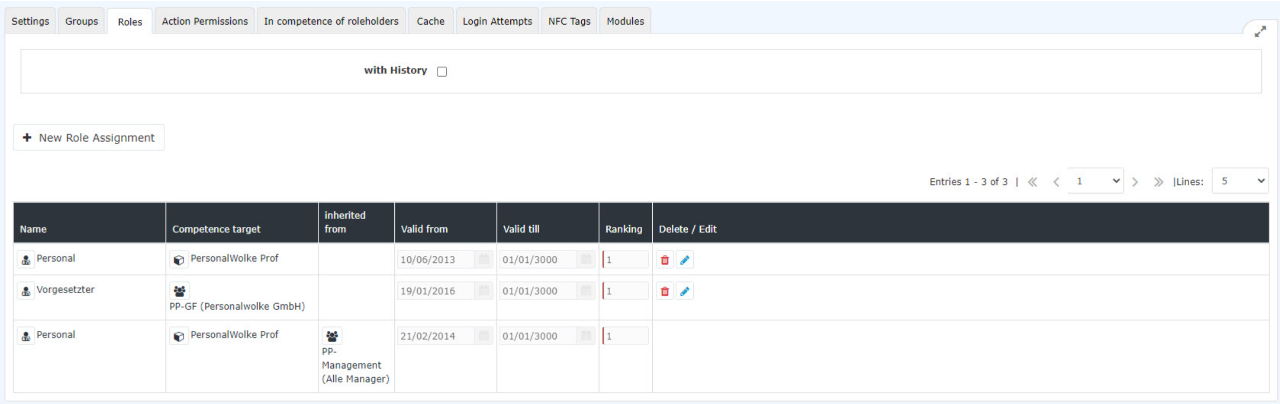
In summary, it can be said that when creating a new person regarding the groups / roles, the following things must be considered:

- **Person has to be assigned to exactly one hierarchical group.**
- **Person has to be assigned to the loose group PP-ALLE.**
- Person gets optional additional rights by adding to loose groups
  - PP management and / or PP admin (when using the time module)
  - PP-TM user / PP-TM manager / PP-TM admin (when using the travel module)
  - PP-PTM-User / PP-PTM-Mgm / PP-PTM-ProjMngr / PP-PTM-Admin (when using the project time module)
- Person gets optional additional rights (correction client) by adding the role Personnel

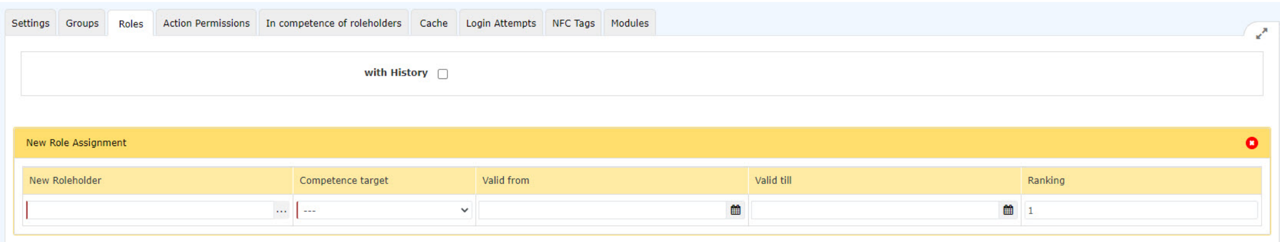
Role assignment for managers and personnel is explained in the next section.

Tab: Roles

Under **Roles**, you can find an overview of the roles assigned to this person in the company. The following screenshot shows that the person has not yet been assigned a role.



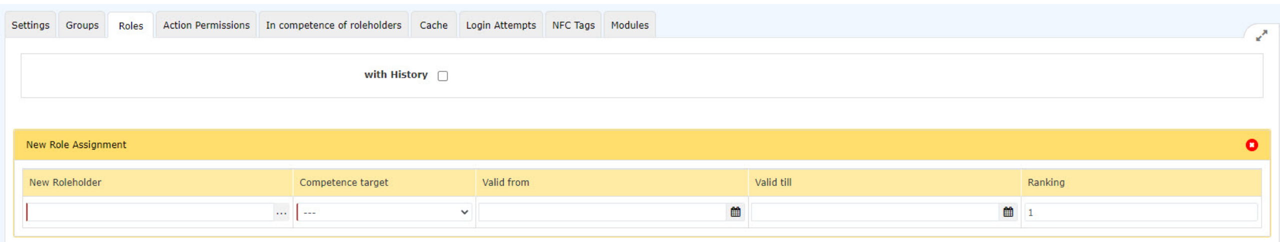
If the employee is now to be assigned another role (superior, personnel), this is done by clicking on the **New Role Holder** button.



- **New role assignment** Selection of the role (manag personnel) to be assigned to the employee.
- **Competence target** refers to the person/group for which the employee is to be responsible.
- **Valid from / Valid to** describes the period in which the employee is assigned the selected role.
- The **order** determines the deputy (sequence 1 = superior, 2 = deputy, 3,4 = if several persons are defined as deputies, the system determines who receives an application for processing).

Example: New role assignment "superior", competence objective: group, "PB-ENTW (development)" - this means that the person performs the role of superior for the group PB-ENTW, i.e. all applications submitted by a person from the group PB-ENTW and requiring approval / review by the role of superior end up with this person. Of course, a special person could also be appointed instead of the group. In this case, the Superior role only applies to the person who was defined.

A person can be assigned several roles with different competence goals!



A click on **Save** defines that the employee is now the **manager of the PB-ENTW (Development)** group.

The assigned roles can also be withdrawn / changed from the user by means of
Delete /
Edit .

1. /daisy/webdesk-manual-admin/6024-dsy.html?language=4
2. /daisy/webdesk-manual-admin/6025-dsy.html?language=4
3. /daisy/webdesk-manual-admin/6026-dsy.html?language=4
4. /daisy/webdesk-manual-admin/6027-dsy.html?language=4
5. /daisy/webdesk-manual-admin/5881-dsy.html?language=4
6. /daisy/webdesk-manual-admin/5885-dsy.html?language=4
7. /daisy/webdesk-manual-admin/5884-dsy.html?language=4
8. /daisy/webdesk-manual-admin/5886-dsy.html?language=4
9. /daisy/webdesk-manual-admin/5887-dsy.html?language=4