Include - Creating a new role holder via the person

Please click the "New role holder" button,

which opens the input screen:

The following input fields are available and must be filled in:

1. Role

You can select the role:

- by entering the full role name
- by entering the first letters and using autocomplete
- by clicking the three dots next to the input field, which opens the roles overview, and selecting from the list

2. Competence target

= what area of responsibility does the new role holder have?
Selection options:

- Persons
- Group
- Client

Once you have selected the type of competence target, you can make a precise selection in the field below: either by entering the whole name or the first letters of the name and using autocomplete, or by choosing someone or a group from the list that opens when you click the three dots next to the input field.

3. Valid from/Valid to

to limit possible assignments. If nothing is entered, the fields are filled with today's date and 01/01/3000, respectively.

4. Sequence

Enter here the rank the future role holder has in relation to the role.
Entering a number determines the order in which the system presents tasks and requests addressed to the role itself to the role holders.

All requests concerning the role are presented first to the first in the sequence (determined by entering "1" in this field).
Requests etc. are assigned to the second if the first role holder is unavailable. After the second come number 3, number 4 and so on.
It is possible to mix persons and groups in the sequence of a role assignment!

The sequence is entered as numbers (1, 2, 3, 4, 5....)

The "+" (plus) button lets you create **further role holders** for the role.

You can find a summary on the topic of sequence under FAQ: Sequence/order of role holders[1].

Clicking "Save" or "Save and close" completes the process. The assignment is effective from the selected "Valid from" date. If you selected the day on which you make the entry, it is immediately visible in the roles overview.

1. /daisy/webdesk-manual-admin/10035-dsy.html?language=4