

## Maintaining Existing Persons

To make changes to existing persons, for example assigning a person to a different group, granting new action permissions, or changing the validity period for certain permissions, select the Persons menu item. Use the search function to find the desired person, click the edit icon to open the detail view, and get an overview of all relevant data.

Person master data that comes from the time tracking system (IF6020) should also be changed there: e.g., name changes, group membership (for hierarchical groups, membership in loose groups such as part-time, flat-rate employee, etc.), termination of employment, etc. These changes are made in the time tracking system and synchronized to Webdesk by means of a job.

## Employee Termination (IF6020)

Former employees are flagged by means of special info fields in the time tracking system (e.g., certain stpinfo fields in the IF6020); the synchronization imports only the current data into Webdesk (according to the configuration).

## Name Change

To change the name of an existing person (e.g., after a marriage, etc.), select the person from the person directory and change the name as desired (by overwriting the name in the **Last name** row). Then click the **"Save & Close"** button to return to the overview of all persons, or **"Save"** if you want to continue editing the form.

We recommend making a name change in the time tracking system first. This change is then synchronized to Webdesk.

## Changing Group Membership

A change of membership in a hierarchical group (department) should likewise be made in the time tracking system. Various other group memberships, such as part-time, parental leave, flat-rate employee, etc., are also assigned there and are then synchronized to Webdesk.

To change the group membership directly in Webdesk, click the Groups tab and select the new group and the validity period. Then click the **"Save & Close"** button to return to the overview of all persons, or **"Save"** if you want to continue editing the form.

## Changing / Deleting Role Assignments

To assign a new role or delete an existing role assignment, select the corresponding person and open the **Roles** tab.

To assign a **new role**, select the corresponding role, the competence target, the validity period, and the ranking (2nd = substitute, etc.)

To **delete** an existing role, activate the check box next to the corresponding role. Then click the button **"Save & Close"** to return to the overview, or **"Save"** if you want to continue editing the form.

## Changing Action Permissions

To add new action permissions to a person, select the new action permission on the **Action Permissions** tab, along with the period for which it is to be valid and the viewing permission. Then click **Save** or **Save & Close**.

To **delete** an existing action permission from a person, activate the check box at the far right of the corresponding action. Clicking Save or Save & Close removes the action permission from the directory.

## Creating a New Person

Normally, new employees are first created in the time tracking system (e.g., IF6020) and then synchronized to Webdesk.

To create a new person in Webdesk, click the "New Person" button bar and fill in the provided fields with the first name and last name. In addition, all master data can be entered on the **Settings** tab:

- **Assignment to a client**  
Selecting a client assigns the person to that client
- **Username**  
Required for logging in to the server (must be unique). In the case of a single sign-on solution, the username must match the NT ID.
- **LDAP Name**  
An LDAP name of the user can be entered in this field (e.g., cn=Max Muster,o=Workflex)
- **ZEF Master Record Number**  
Master record number from the Time & Attendance system (must match it)
- **Personnel Number**  
Should likewise match the personnel number from the Time & Attendance system; can be set to any value if needed.
- **Date of Birth**  
The user's date of birth
- **Mailbox ID**  
Name and path of the mail database
- **Setting for whether an email notification is to be sent**  
Yes/No: if the parameter is activated (Yes), the user is notified by email when a request has been assigned to them.
- **Setting for whether an email notification is to be sent if the person is a substitute**  
Analogous to the email notification item, from the substitute's point of view
- **Setting for whether the person may approve as a substitute**  
Yes/No: if this parameter is set to Yes, the substitute arrangement is active. The substitute is then authorized to approve requests
- **Mail Server**  
Name of the mail server
- **Email**  
ID of the mail file/mailbox
- **Password**  
The user password is set. Here the administrator can reset the user's password to any password.

After all fields have been filled in, click the "**Save & Close**" button to return to the overview of all persons, or "**Save**" if you want to continue editing the form.

After saving, a confirmation is displayed in the title bar and the entered data is shown.

You can then automatically assign the person to groups, assign a role, grant action permissions, and determine who is in the area of competence of this role holder.

You can either click **Save** or **Save & Close** after each individual step, or do so only at the end, after the last action you wish to perform.

## Assigning to a Group

To assign a newly created person to a specific group, click the **Groups** tab. Based on the organizational chart, you can then select a new group from the predefined group selection, along with its validity period.

## Assigning Roles

To assign a role to a newly created person, click the **Roles** tab and select the desired role, the competence target (All, Person, Group), the validity period, and the desired ranking.

## Granting Action Permissions

This tab allows you to grant action permissions and to define the validity period and the viewing permission (own person, org unit / + subordinate, specific, own client, all clients).

- **New action permission**  
Granting new action permission(s)
- **Valid from - to**  
Definition of the validity period
- **Viewing permission**  
Definition of the viewing permission
  - **Own person:** The viewing permission applies only to the own person
  - **Org unit:** Viewing permission for the own department
  - **Org unit and subordinate:** Viewing permission for the own department and all departments subordinate to it
  - **Specific:** Viewing permission for several mutually independent groups
  - **Own client:** Viewing permission for all persons of the own client
  - **All clients:** Viewing permission for all persons of all clients

## In the Area of Competence of These Role Holders

Clicking the **In the Area of Competence of These Role Holders** tab gives you an overview of all role holders who have role responsibility for the selected person.

## Deleting a Person

To delete a person from the person directory in Webdesk, select the person concerned and click the "Delete" button (located at the right of the button bar). As a safety check, a message appears asking whether you really want to delete the person.

Confirming with the **OK button** deletes the person. The person also no longer appears in the group overview (persons assigned to a specific group).

The other option is to delete the employee in the time tracking system and then update the Webdesk data by synchronizing it.