Master Data / Accounts

Creating a New Configuration

If required, multiple configurations of the master data / accounts can be created, e.g., if selected departments need to see different accounts or master data. To do this, go to the action "Master Data / Accounts" (ta_showPersonalData) and click the "New configuration" button.

The new configuration is given

- a name and
- a heading
- Save

After the first save, **general settings** can be made:

- Description
- Selection of the icon
- Assignment of permissions

Then the **configuration details** are determined >> click the "Edit configuration details" button

- **Show photo**
  If the option is activated (default), the person's photo is displayed. Here, the user can store or change their own photo.

Master data

- **Type**
  This parameter determines which value is displayed in the column:
  - Person fields T&A - fields from the person master record in Time & Attendance
  - Webdesk person fields - fields from the person master record in Webdesk
  - Blank line - If this parameter is selected, a blank line appears in the output form
- **Attribute**
  These parameters depend on the selected type.
  - If the type **"Person fields Time & Attendance"** is selected, person fields from Time & Attendance can be selected, such as personnel number, first name, name, department, various account values from Time & Attendance, etc.
    The following attributes are available:

Name	Description
employeeID	Personnel no.
firstName	First name
lastName	Last name
orgUnit	Department
region	Region
stabt	Department
stakoart	Cost type
stakosnr	Cost no.
stakost	Cost center
...	...

- If the type **"Webdesk person fields"** is selected, person fields from Webdesk can be selected, such as email address, personnel number, name abbreviation, user name, etc.
  The following attributes are available:

Name	Description
userName	User name
email	Email address
employeeID	Personnel no.
shortName	Abbreviation
...	...

- **Heading**
  Heading that should appear in the output form
- **Up / Down**
  Move the order within the rows up or down
- **Delete**
  The row is deleted
- **Add**
  Add a new column/row
- **Output formats**
  Selection of the output formats Print, PDF
- **Page layout** (only for PDF format): Landscape, Portrait

Accounts

The accounts can be displayed in 2 columns - left and right column. A separate heading can be entered for each column.

- **Heading**
  Enter the heading (for the left or right column) that should appear in the master data / accounts form
- **Type**:
  - **Account**
    If this parameter is selected as the type, various account values from Time & Attendance are displayed (billable accounts, daily values, ...)
  - **Blank line**
    If this parameter is selected, a blank line appears in the output form.
  - **Blank line + text**
    A line without an account value appears, showing only the text entered under "Heading" (e.g., as a subheading).
- **Attribute**
  This parameter depends on the selected type. If the type Account is selected, various accounts from Time & Attendance can be selected in the Attribute column. If "Blank line" or "Blank line + text" is selected in the Type column, no attributes are available.
- **Heading**
  Heading that should appear in the row
- **Icon**
  Optionally, an icon can be selected for the type Account. It is used in the dashboard widget "Account values", which displays the accounts stored in this configuration.
- **Convert**
  If an account value is selected, this value can be displayed either in normal minutes or in industrial minutes

- **Format pattern (decimal separator)**
  Formatting characters: 0 and #
  - 0: Empty decimal places are replaced by a 0, e.g.: 9.71 + 00.000 >> 09,710; 9.71 + 0.0 >> 9,7;
  - #: Empty decimal places are not replaced, e.g.: 9.71 + ##.### >> 9,71; 9.71 + #.# >> 9,7
  - **Decimal separator** (. , ;)
- **Show unit**
  Yes (default) / No: determines whether the unit is displayed with the account value.
- **Up / Down**
  Order within the rows
- **Delete**
  The row is deleted
- **Add**
  New rows are added.

Editing an Existing Configuration

If you want to change an existing configuration, e.g., by removing or adding accounts, or changing or reassigning permissions, etc., select the desired configuration.

This can be done either via the **menu tree**:

- Menu tree >> Master Data / Accounts >> right-click >> Edit action.

Or via the **action** itself:

- Menu item Actions >> Select action
- Configurations tab >> select the desired configuration.

Once you have reached the right configuration, click the "Edit configuration details" button. The configuration can now be changed as desired.

Felder

Name	Wert
Modul	Time & Attendance (ta)
Webdesk Actionname	ta_showPersonalData
Artefakt-Typ	Action