How To: Person management

As an administrator, you access the **person management** via the menu tree under:

MASTER DATA
--> Persons

In the **data table** you will find an overview of all **persons** registered in the system. With various **filter and search options**, persons can easily be found and grouped by different criteria. In addition to the option of **adding new persons** and editing their data in the **"Settings" tab**, **further settings** can be made in several sub-tabs:

Groups	Roles	Action permissions	In the competence area of these role holders	User inputs	Login attempts	NFC tags	Modules

Creating a new person

By clicking the **"New person"** button in the person overview, a new person can be entered into the Webdesk system. The **following fields** can be filled in:

- **First and last name** of the new person
- **Valid from/to:** here the person can be assigned an "expiry date" after which this person no longer appears in Webdesk

Under the **Settings** tab, the following data can also be specified:
Fields with a red bar must be filled in!

Active user	Checking this parameter determines whether the employee is managed in Webdesk as **active or non-active** (see here[1])
Client	Selection of the **client** to which the new person is to be assigned
User name	This is used for **logging in to the Webdesk server** and must be **unique** in the system. In the case of a single sign-on solution, the user name must correspond to the NT ID.
Personnel no.	Following the client-specific prefix, the personnel number can be assigned freely as a **numeric or alphanumeric string**. If a client has already been selected, the system suggests a personnel number to assign
ZEF master record no.	The master record number from the time management system (must match it)
E-mail notification	Setting for whether an e-mail **notification** is to be sent. If "Yes" is selected here, the user is notified by e-mail when a **request** has been assigned to them for review/approval/processing
E-mail notification as deputy	Analogous to the "E-mail notification" item, this decides whether a **notification** is to be sent if the

	person is the **deputy** of a person to whom requests have been assigned `--> QUESTION ??!
Deputy may approve	If "Yes" is selected here, the **deputy rules** are active. The deputy of the person created is then authorized to approve requests assigned to the person
E-mail	**E-mail address** of the newly created person
Language	Primary language in which the person's personal Webdesk is to be displayed - can be changed by the person in the user menu QUESTION
Time zone	Time zone in which the person is primarily located QUESTION
View	Primary view of the Webdesk interface, choice between **classic** (old) and **responsible** (modern) - can be changed by the person in the user menu
Menu	Selection of the menu view between **mobile** (tiles) or **desktop** (list) - can be changed by the person in the user menu
Link page to menu	If this checkbox is activated, the corresponding item in the menu tree is expanded and highlighted depending on the page currently open
Master & contact data	Entry of various **data** such as date of birth, title, address, telephone, etc., ...
Change picture	By clicking "Change", a new **profile picture** can be defined for the person in Webdesk or the existing one can be changed
Password management	Here you can check whether and when a password has already been assigned, or use the "**Reset 2nd factor Authentication"** button to **reset the current password**

Depending on the setting under the "Client" menu item, the items **"E-mail notification", "E-mail notification as deputy"** and **"Deputy may approve"** can be made uniform for the entire client and displayed as changeable, fixed and visible, or invisible. A more detailed description can be found under **Client**[2].

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Important! Resetting the password: After the administrator resets the password, the user password is reset to the **default password** and only for a single login. After logging in, the user is asked to change the password.
The default password is defined in the **system parameters**.

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If the parameter "**useUsernameAsStandardPassword**" is set to **"true"**, the user name serves as the password.

Click "Save & Close" to return to the overview of all persons, or "Save" if you want to continue editing the form.

After saving, you receive a confirmation from the server (it appears in the title bar) as well as an overview of all the data entered.

This allows you to automatically assign a person to groups or a role, grant action permissions and determine who is in the competence area of these role holders.

You can click "Save" or "Save & Close" either after each individual step or only at the end, after the last action you wish to carry out.

Assigning to a group

To assign a newly created person to a specific group or to change existing group memberships, click the **"Groups"** tab and then proceed as follows:

- optionally select the required **organizational structure,** such as organizational chart, loose group, project group or cost center
- **with history**
  This parameter allows historized records to be displayed (if checked).
- Determine the **new group**
  Selection of a new group from the predefined group selection
- Determine the **validity period** in which the person is to belong to the group (temporary or permanent assignments possible)

Don't forget: an employee can only be assigned to one hierarchical group (organizational chart), but can be assigned to several non-hierarchical organizational structures (loose groups, project groups) at the same time.

Assigning roles

To assign a role to a person, click the **"Roles"** tab and fill in the following fields:

- **New role assignment** - selection of the desired role from the available roles
- **with history**
  This parameter allows historized records to be displayed (if checked).
- Determination of the **competence target** (All, Person, Group)
- Definition of the **validity period** in which the role is to apply (temporary or permanent assignments possible)
- Determination of the desired **ranking** (1= superior, 2= deputy - it is possible to determine several role holders or deputies here)

Granting action permissions

Action permissions can be assigned via the person master sheet, as well as via a role or the respective actions.
In the person master sheet, permissions are granted in the Action permissions tab by filling in the following fields:

- **New action permission** - selection of the desired permission (sorting by action, configuration, process reference, name or description possible)
- **Negative**
  This parameter is used to exclude a permission. If it is set to "Yes", the person may not view the action.
- Determination of the **validity period** (temporary or permanent assignment of action permissions possible)
- Definition of the **view permission**:
  - **Own person**: view permission applies only to the person themselves
  - **Org unit:** view permission applies to the own department

- **Org unit and subordinate units**: view permission applies to the own department and all departments subordinate to it
- **Special**: view permission can be determined for several mutually independent groups or persons
- **Own client:** view permission for all persons of the own client
- **All clients:** view permission for all persons of all clients

In the competence area of these role holders

Clicking the "In the competence area of these role holders" tab gives you an overview of all role holders who have a role responsibility for the selected person, such as the responsible superior, the HR department, etc.

Maintaining existing persons

If you want to make changes to existing persons, for example assign them to another group, grant new action permissions or change the validity period for certain permissions, first select the

- **"Persons"** menu item and find the desired person using the search option.
- Then click the edit icon and the detail view to get an overview of all relevant data.

Changing group membership

- "Groups" tab and selection of the new group
- Select the validity period
- Click "Save & Close" to get the overview of all persons, or "Save" if you want to continue editing

Changing/deleting the role assignment

To make a new role assignment or delete an existing role assignment, select the corresponding person and choose the "Roles" tab.

To assign a new role, select the corresponding role, the competence target, the validity period and the ranking.

To delete an existing role, click the delete button on the far right and then "Save & Close" to return to the overview, or "Save" if you want to continue editing the form.

Clicking the **edit icon (Edit)** lets you change the validity period or the ranking. The change is then saved using "Save".

Changing action permissions

- "Action permissions" tab and select the new action permission
- Specify the period for which it is to be valid
- View permission
- Click "Save" or "Save & Close"

If you want to **delete an existing action permission** of a person, activate the checkbox on the far right of the corresponding action. Clicking "Save" or "Save & Close" removes the action permission from the directory.

Determining a deputy

To be able to determine a deputy, a deputy must first be created in the corresponding role. This is evident from the ranking within the role - **ranking 2** means that a deputy has been defined.

To activate the deputy rules, set the parameter "Deputy may approve" to "Yes" in the **person master sheet** on the "Settings" tab.

The employee can also make this setting themselves in their "personal settings". If the deputy rules are set via the personal settings, this is also updated automatically in the person master sheet.

Deleting a person

Usually, persons who are no longer needed (e.g. employees who have left) are deleted or marked as inactive in the time management system. The deletion is also carried out in Webdesk by means of a synchronization. If a person is to be deleted manually from the person directory, select the person concerned and then proceed as follows:

- Click the "Delete" button in the person master sheet
- Security check: a security prompt appears asking whether the person should really be deleted
- Confirming with the OK button deletes the person. They also no longer appear in the group overview (persons assigned to a specific group).

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Caution! If the deleted persons are still in the time management system, they may reappear in Webdesk after a synchronization.

Synchronizing persons from the time management system

If a time management system is used in the company, the person master data is usually imported from it. For this purpose, connectors are used, which perform a synchronization or reconciliation between the time management system and Webdesk. The data is synchronized automatically with the help of a dedicated job. This job defines which data is to be taken over from the time management system. If any changes are made in the time management system, they are continuously synchronized in Webdesk (depending on the job parameterization).

The following procedure is recommended for setting up the synchronization:

- Create a group connector
- Create a person connector
- Set up a job that starts the synchronization (job configuration derived from Start Connector LinkSync)

For the connectors, the following parameters must be prepared in the person data of the time management system:

- taID --> **Master record number** from system 6020 (primary key)
- employeeID --> **Personnel number**
- firstName --> **First name**: e.g. first part of stname (stname.split(' ')[1]
- lastName --> **Last name**: e.g. second part of stname (stname.split(' ')[0]
- $client --> **Name of the client** of the user
- $group --> **Organizational unit** (e.g. stabt)
- userName --> **User name for login**
- password --> initial password
- email --> smtp **mail address** for sending mail

After the reconciliation, all persons from the time management system should also be found in Webdesk. It is recommended to synchronize the groups first, and only then the persons.

You can find more information under "**Connectors**" and "**Jobs**".

Felder

Name	Wert
Modul	Portal & Organisation (po)
Webdesk Actionname	po_editPerson
Artefakt-Typ	Action

1. /daisy/webdesk-manual-en/admin/po-overview/3065-dsy/2636-dsy.html
2. http://intranet/daisy/webdesk-manual/g3/2682-dsy/3065-dsy/2632-dsy/246-dsy.html