Client administration

General information

A **client** usually represents a company or a group of companies (e.g. a corporate group).

The client is the **highest or most far-reaching organisational** element in Webdesk EWP. The client forms the **base platform**, so to speak, on which the organisational structures are determined, groups and persons are assigned or permissions are assigned.

> NOTIZ
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> Usually, one **client** is created for each **company** (or group of companies). It is not normally advisable to use client division to separate sub-areas of the company from each other.

In cases where there are several **independent subcontractors** of a corporation in which customers or **internal company processes** are independent and there are no overlaps between these subcontractors, it is possible to map these as separate clients if desired.

If, on the other hand, there are **overlaps** or **cross-enterprise roles** are planned, it makes much more sense to map the sub-companies of the enterprise below a **top-level organisational unit** (holding company, parent company, etc.) as sub-areas within **ONE client**. This guarantees all the advantages of comprehensive analysability and processes, including a high degree of flexibility with regard to subsequent structural changes in the group of companies.

One client vs. multiple clients

The classic use case for the use of **multiple clients** is the operation of the Webdesk EWP platform for servicing **different companies within a data centre**, whereby these companies have **little or nothing to do with each other**.

For such cases (also known as **Multi-Tenancy Software-As-A-Service** or **SaaS**), it is suitable to define one client per customer. This has the advantage that synergies in parameterisation are possible compared to a complete separation of the webdesk instances (i.e. one webdesk instance per customer). For example, configurations of actions can be used for several clients without affecting the authorisation structures of the application.

Furthermore, it is also possible in a multi-client environment to define cross-client reports and processes. For example, a procurement process that is to function in the same way across all clients could be assigned to a central, cross-client role that then carries out the purchase.

However, these **parameterisation variants** are much **less flexible** than defining the various areas as organisational units. As soon as a cross-client report or a cross-client process is required, it is therefore advisable in most cases to use only ONE client and to restrict the rights via sub-trees of the organisation chart.

Using the client for authorisation control

Permissions can be assigned to the client, which then apply to all persons/groups/units within the client (i.e. for the entire company). This facilitates the handling of general functionalities and actions, such as booking, group calendar, monthly journal, access to the various forms (absence request, sick note, etc.).

More on this under Authorisation control[1]

Client change

Currently, **moving** a person within Webdesk EWP between clients via the user interface is not fully supported. In principle, this option is possible, but additional technical relationships must be adjusted in the database.

Conversely, this example also makes it clear what clients in Webdesk are intended for. They are therefore legally and organisationally completely separate units, which are only mapped within a Webdesk instance for the purpose of parameterisation and operational synergies.

Felder

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

1. /daisy/webdesk-manual-en/g3/2682-dsy/5479-dsy.html