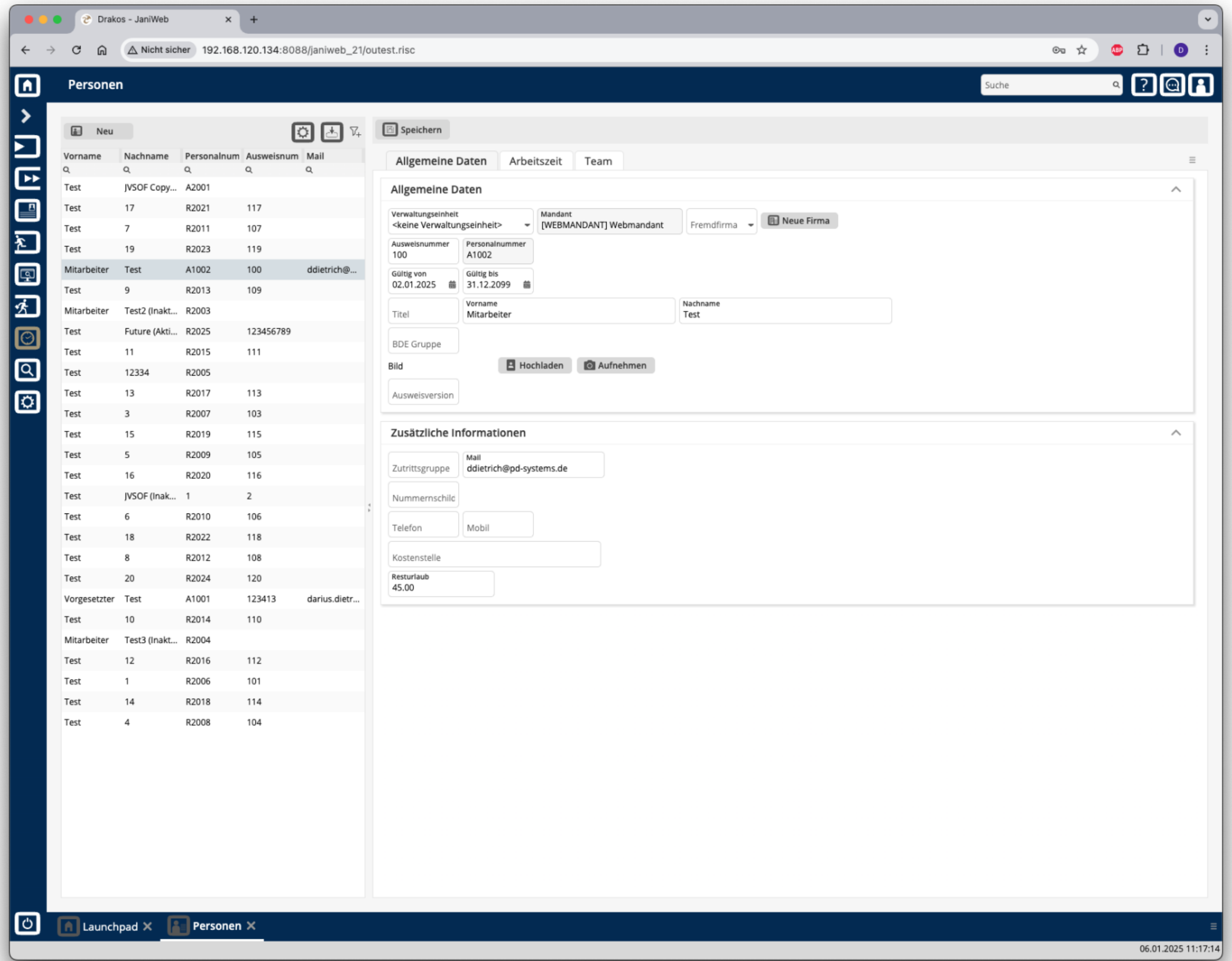
Persons

You can manage the persons within the Time and Attendance module using the menu item *Persons*. Here you can also define supervisors for employees or specify substitudes for supervisors.



List of persons

The list contains the persons that have already been created. Select a person to view details.

The list offers the following options:

- **Select columns to display:** Press the gear icon. Select which columns you want to display and in which order. Arrange the columns using the mouse or the arrow icons. Press *Apply* to adopt the changes.
- **Filter by client and status:** Press the filter icon. Select the clients and the status (*Active*, *Active in future*, *Inactive*) for which persons should be displayed. Changes are visible immediately.
- **Search in columns:** Enter text or numbers in the search field (magnifying glass icon) of a column to search for names, personnel numbers, or other criteria. The entries take effect immediately: the list only displays hits.
  Tip: Search for substrings. You can find “Spencer-Churchill” with “spe”, “chur” or “hill”. The search is not case sensitive.
- **Export the entire list:** Press the download icon. Select the format in which you want to export the list. The export files are downloaded or displayed depending on the browser/operating system settings.For details on the available export formats, see the General > Export Formats chapter of this manual.

Button *New*

Press *New* to create a new person. Enter the required information about the person on the tab *General Data* and press *Save*.

Tab *General Data*

This is where you store and edit personal data. You can individually define which fields and areas are available here via *Settings* > tab *General*.

> Personal data that is transferred from external systems (e.g. SAP) cannot be changed here. They must be edited in the respective source system.

Tab *Working Time*

- *Leave:* Enter the annual holiday for the person.
- *Holiday Calendar:* Select a holiday calendar for the person. This calendar will be considered in the *Team Calendar* for this person.

Tab *Team*

Select the *Supervisor* for the person. This determines the person to whom workflow requests for bookings and absences are forwarded. The supervisor is authorized to process such requests in the menu item *Workflow*.

In addition, supervisors can designate up to three *Substitudes* for themselves. During the substitution period, all workflow requests are also forwarded to the supervisor’s substitude.

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