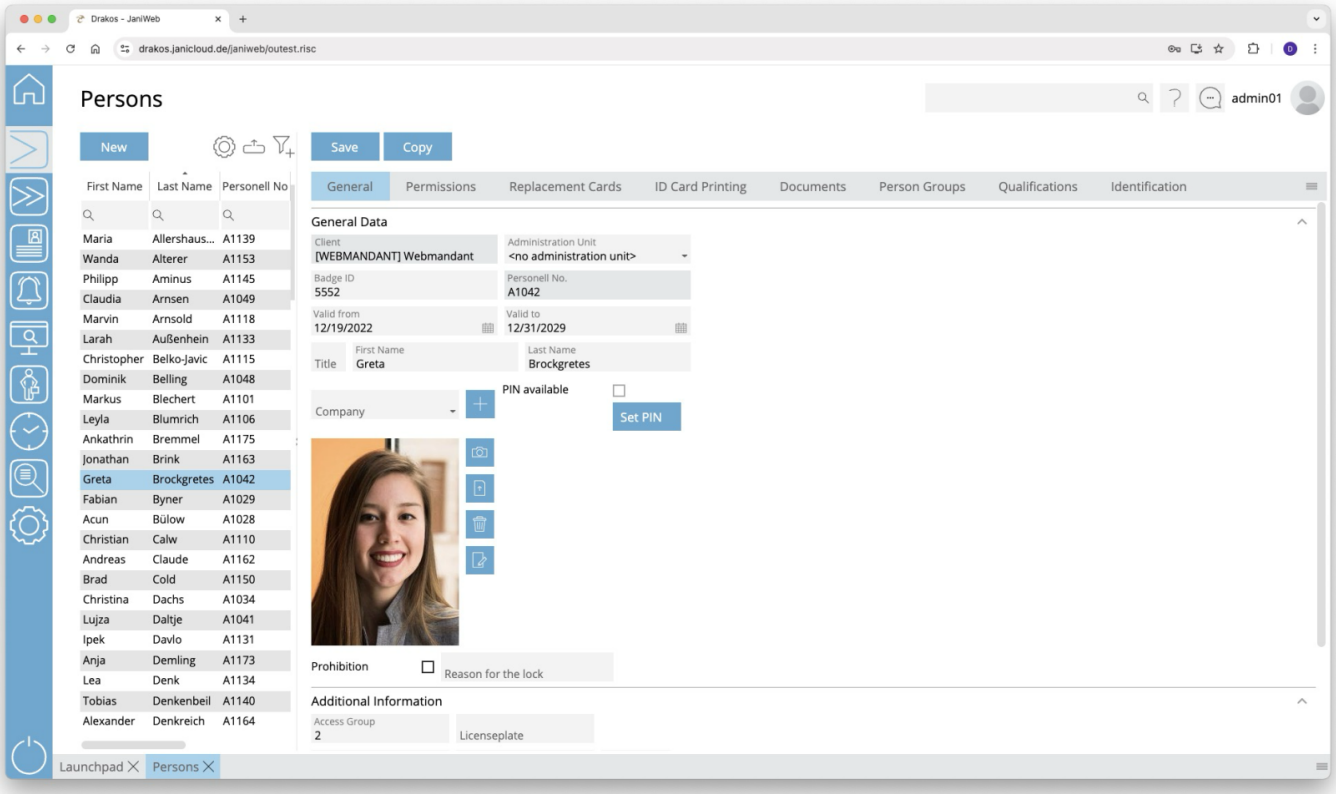
Persons

The *Persons* menu item allows you to manage the personnel in your system. Here you can create new persons or change details of existing persons.



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 *Permissions*

Here you can grant (*Add Device Group / Add Device*) or revoke (*Remove Group / Remove Device*) permissions for a person.

The lists on the tabs *Add Group / Add Device* provide an overview of all permissions linked to the person. The column *Origin* indicates where the permission comes from. For example, it could have been passed on to the person via a person group or transferred from the Janitor system.

> If the tabs *Delete Device* or *Delete Group* contain a device or device group, access via this device or device group is not possible. This also applies if a permission for the device or device group has been granted on the tab *Add Device* or *Add Device Group*.

> A tick after the title of a tab indicates that there is data within the tab.

Workflow Permissions

> This feature is optional and not available in every installation.

If assigning a device or device group is associated with a workflow, the permission becomes active only after the decision-maker approves the workflow request.

If you select a device or device group that has a workflow, a dialog box appears. This prompts you to enter values for the time model and the validity of the permission. You also have the option of leaving a comment for the decision-maker.

You can create multiple workflow requests at once. To send them, press *Save*.

Workflow requests are indicated by different colors:

- **Yellow:** The request has not yet been approved.
- **Green:** The request has been approved.
- **Red:** The request has been rejected.

You can extend the validity of approved permissions. To do this, press *Extend*. Then select new validity dates and create another workflow request.

Tab *Replacement Badges*

Here you can issue up to three replacement IDs for one person. Only one ID can be active at a time.

- Press *Issue Badge*.
- Select an ID from the list or enter the number manually. IDs marked in red are already assigned.

You can define the number range for replacement IDs individually for each location via the menu item *Settings*.

Tab *Badge Printing*

> This feature is optional and not available in every installation. Depending on the version, it may also be available in the main menu.

This tab allows you to print badges with the person’s information. You can define the layouts for printing badges via the menu item *Badge Printing > Settings*.

Tab *Documents*

Here you can link documents to the personnel master record. To upload new documents, drag the file(s) into the area provided. Or press *Upload Documents* and select the desired files on your computer.

Tab *Person Groups*

Here you can see to which person groups the selected person is assigned. You can manually add or exclude person groups. Manual adjustments overwrite the automatic assignment based on the person’s criteria.

Manual adjustments are marked accordingly:

- **Manually assigned:** The person group is highlighted in green and the note *manually assigned* is added.
- **Manually excluded:** The group of persons is highlighted in yellow and the note *manually excluded* is added.

You can remove manual adjustments at any time using the trash can icon.

Tab *Qualifications*

Qualifications enable you to unlock permissions for the selected person. Use the menu item *Qualifications* to specify which qualifications can be selected here.

Tab *Identification*

Here you can manage the various media that a person can use to identify themselves on a device. To add a new identification medium, press *Add*.

- *Identification*: Enter the value for the medium in this column (e.g. “F DD 193E” for a license plate).
- *Type:* Select the type of identification in this column (e.g. license plate).

- *Valid from* / *Valid to*: Define a validity period for the medium.
- *Prohibition*: In this column, you can block individual identification media.
- *Reason for ban:* You can enter a comment here as a reason for the ban.
- To remove an identification medium, use the trash icon.

Press *Save* to save the entries.

TIPS

Press *Copy* at the top to create a copy of the selected person, including their properties and permissions.

Revision #12
Created 2024-11-26 16:46:22 UTC by DRAKOS
Updated 2025-10-06 09:51:30 UTC by DRAKOS