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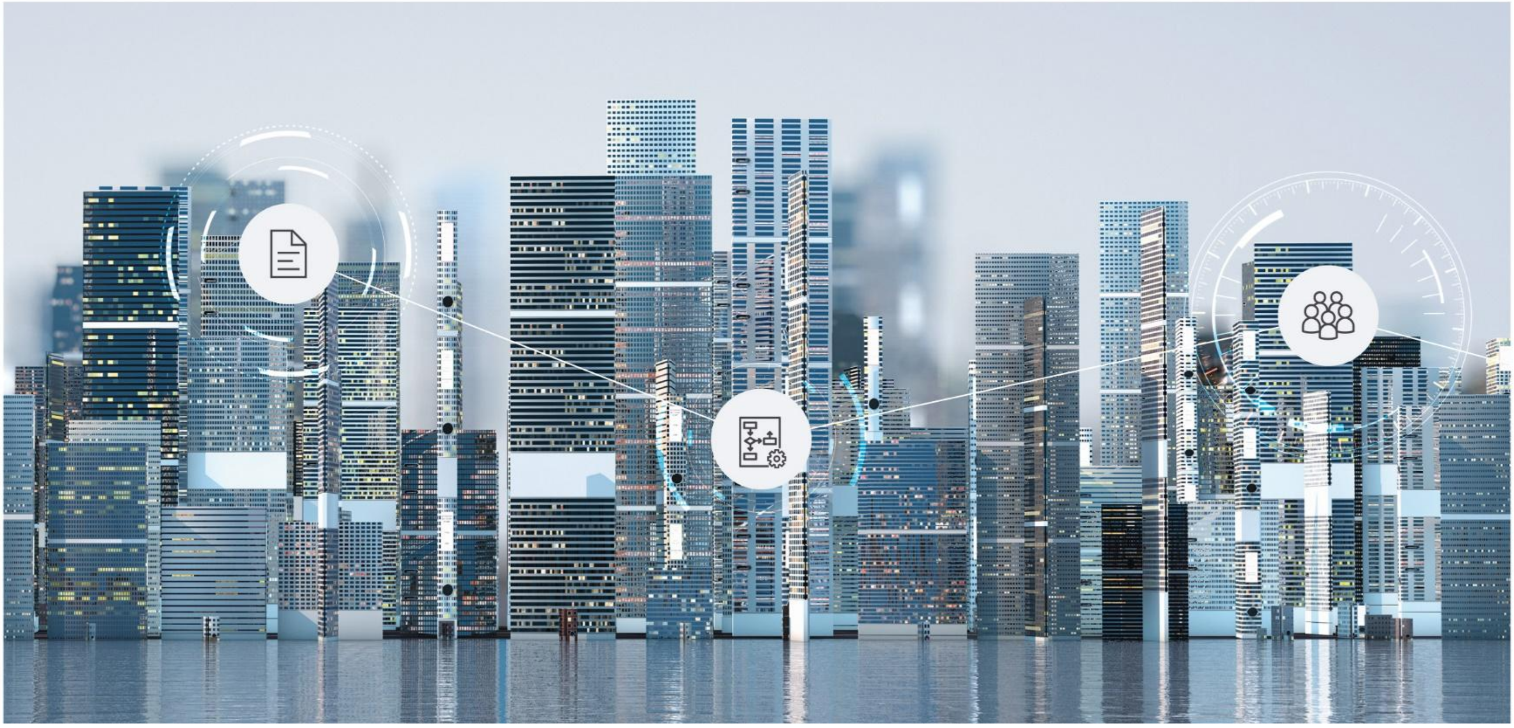

User Help

Fabasoft Personnel File

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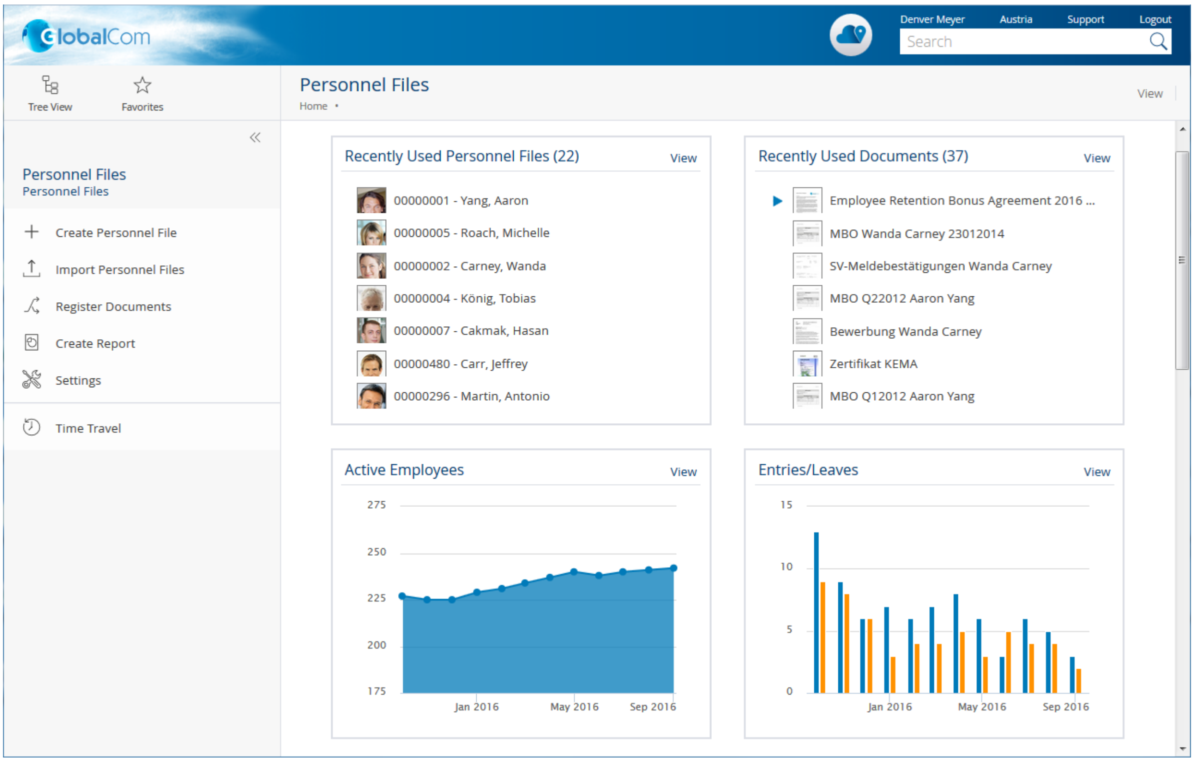
1 Introduction

The Fabasoft Personnel File provides electronic management of personnel files in a central location. You can either record the mandatory personal data via the web browser interface or use the import mechanism. Additionally, you can store documents of a personnel file in a folder hierarchy of your choice. Dashboards offer a comfortable and quick overview of your personal files.



2 Getting Started with your Personnel File

A prerequisite for the use of the personnel file is that the “Personnel File” service package is activated. In addition, the service packages “Personnel File (Access)” and “Skills Management” are available as optional extensions.

If you are the organization owner, organization administrator, or personnel file administrator, you will find topics on setting up and administering the personnel file in chapter 17 “Administration Tasks”.

If you are a personnel file user, see topics about using the personnel file from the next chapter onwards.

3 Structuring Elements of the Personnel File

The structuring elements of the personnel file are:

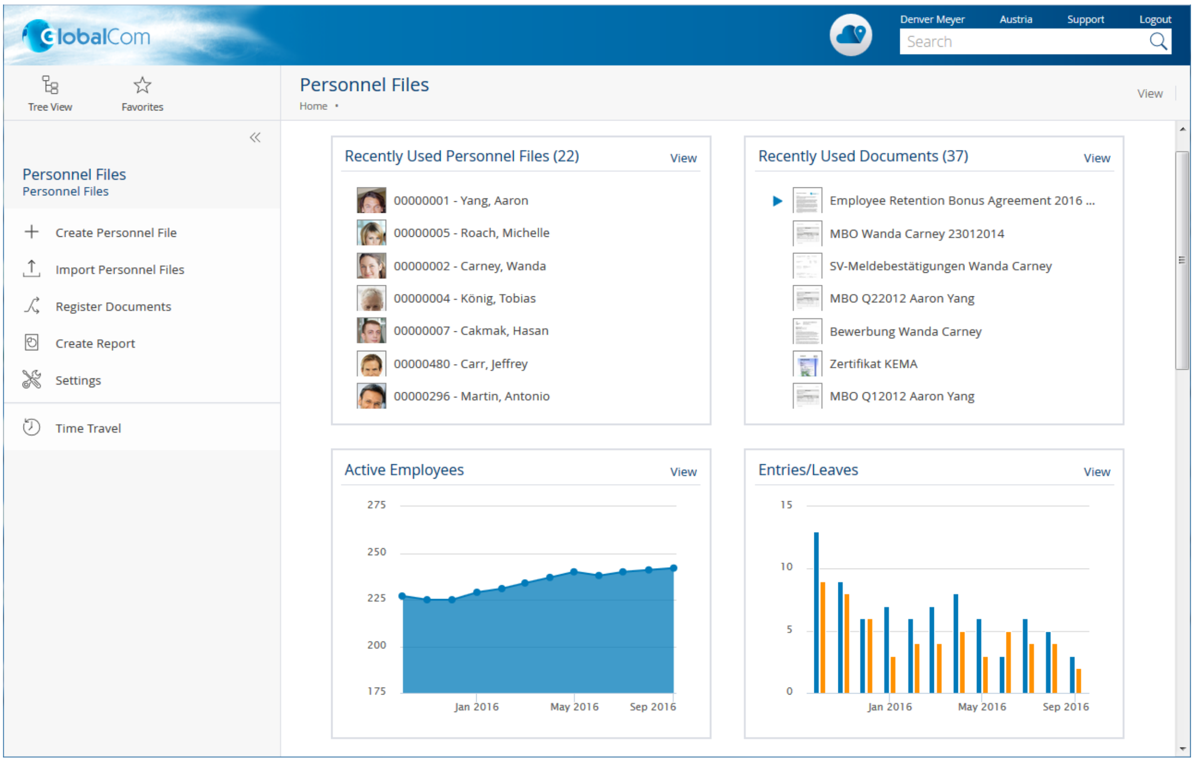
- Personnel File (Dashboard)
  For end users the dashboard is the access point to the personnel file.
- Personnel File Configuration
  In the personnel file configuration common settings, the structure of personnel files and the personnel file users (licensing) are defined.

- Personnel File Shelf
  The personnel file shelf is based on a personnel file configuration, but the defined settings can be overwritten or extended. The personnel file shelf is used to manage the personnel files and to specify the access rights.
- Personnel File
  A personnel file is assigned to a person who is standing in an upright employment relationship with the company or will be or was in such an employment relationship. Besides the possibility to enter metadata, documents can be stored.
- Personnel File Folder
  Personnel file folders are used for structuring personnel files. Besides the predefined folders that are defined in the personnel file configuration or personnel file shelf, additional personnel file folders can be created ad hoc.
- Business Case Shelf
  In a business case shelf, business cases and documents are managed, which are not assigned to a single personnel file. Bulk documents can be used to generate and store individual documents for each personnel file.
- Personnel File Collection
  A personnel file collection can be created in a Teamroom and can be used to collect personnel files that are relevant for the user.

4 Personnel Files (Personal Dashboard)

The personnel files dashboard provides the access point to the personnel file for end-users.

When you are added as a personnel file user to a personnel file configuration, a dashboard is automatically created and placed on “Home”. If you are removed as a personnel file user, the dashboard is removed, too.



4.1 Dashboard

The personnel file dashboard is divided in following areas:

- *Recently Used Personnel Files*
  Shows the personnel files that have been recently used by the user.
- *Recently Used Documents*
  Shows the documents that have been recently used by the user.
- *Inconsistent Personnel Files*
  Shows inconsistent personnel files if the consistency check is configured.
- *Active Employees*
  Shows the number of active employees in the last twelve months.
- *Entries/Leaves*
  Shows the number of entries and leaves in the last twelve months.
- *Turnover*
  Shows the turnover of staff in the last twelve months (Schlüter formula).
- *Report Results*
  Shows the generated Excel/BIRT reports (see section 17.2.2).
- *Organizational Structure*
  Shows the organizational structure that can be used to assign personnel files to positions.
- *Personnel File Shelves*
  Shows the personnel file shelves that are used to manage the personnel files.
- *Business Case Shelves*
  Shows the business case shelves that are used to manage the business cases.

Note: The statistics are only available, if the setting *Calculate Statistics* of the personnel file shelf is activated. By default, the data is updated once a day. With the “Update Statistics” context menu command of the personnel file shelf the data can be updated manually.

4.2 Actions

You can execute following actions:

- Create Personnel File
  With the “Create Personnel File” action you can create new personnel files. For more information, see chapter 6.1 “Create Personnel File”.
- Import Personnel Files
  With the “Import Personnel File” action you can import or update personnel files using a CSV file. For more information, see chapter 6.2 “Import Personnel File”.
- Register Documents
  With the “Assign Documents” action you can register documents (which are already in the system) to personnel files using a CSV file. For more information, see chapter 8.15 “Registering Documents Automatically”.
- Switch to Configuration
  With the “Switch to Configuration” action you can open the personnel file configuration.
- Settings
  With the “Settings” action you can define common properties of the personnel files dashboard like the logo or notification setting.

5 Personnel File Shelf

The personnel file shelf is used for the management of personnel files and predefines the folder structure of personnel files.

5.1 Dashboard

- *Personnel Files*
  Shows the active and inactive personnel files of the personnel file shelf. Active means that an upright employment relationship with the company exists. Inactive means that the entry date is in the future (predefined personnel files) or the separation date is in the past.
- *Inconsistent Personnel Files*
  Shows inconsistent personnel files if the consistency check is configured.
- *Active Employees*
  Shows the number of active employees in the last twelve months.
- *Entries/Leaves*
  Shows the number of entries and leaves in the last twelve months.
- *Turnover*
  Shows the turnover of staff in the last twelve months (Schlüter formula).
- *Scan Queue* (only visible if at least one pre-captured document exists)
  Shows the pre-captured documents in which no scanned content has been uploaded.
  Note: Your system administrator has to configure the scanner software accordingly such that the documents can be imported via a web service.
- *Report Results*
  Shows the generated Excel/BIRT reports of the personnel file shelf (see section 17.2.2).

- *Closed Personnel Files*
  Shows the closed personnel files of the personnel file shelf. Closed personnel files cannot be changed.
- *Canceled Personnel Files*
  Shows the canceled personnel files of the personnel file shelf.
  Note:
  - Canceled personnel files can be permanently deleted by users with "Full Control", if no retention rules are violated.
  - If there are more than 2000 personnel files in the list, the oldest cancelled personnel files are archived.
- *Thesauri*
  Shows the thesauri in which terms for tagging of documents can be managed. At least one thesaurus has to be created in the personnel file configuration or personnel file shelf so that the tagging can be used. The default thesaurus for new terms is defined in the settings of the personnel file configuration or personnel file shelf. Thus, new terms can be created directly in the tagging process. If no standard thesaurus is specified, only the predefined terms in the thesauri can be used. The default thesaurus of the personnel file shelf is preferred to the default thesaurus of the personnel file configuration.

Note: The statistics are only available, if the setting *Calculate Statistics* of the personnel file shelf is activated. By default, the data is updated once a day. With the "Update Statistics" context menu command of the personnel file shelf the data can be updated manually.

5.2 Actions

You can execute following actions:

- Create Personnel File
  With the "Create Personnel File" action you can create new personnel files. For more information, see chapter 6.1 "Create Personnel File".
- Import Personnel Files
  With the "Import Personnel File" action you can import or update personnel files using a CSV file. For more information, see chapter 6.2 "Import Personnel File".
- Register Documents
  With the "Register Documents" action you can register documents (which are already in the system) to personnel files using a CSV file. For more information, see chapter 8.15 "Registering Documents Automatically".
- Download Birthdays Report
  The context menu action "Download Birthdays Report" can be used to download an Excel report that lists all birthdays for today and the next 10 days. To do this, you need "Change Access" or "Full Control".
  Note: The report can be updated via the "Update Statistics" context menu.
- Download Anniversaries Report
  The context menu action "Download Anniversaries Report" can be used to download an Excel report that lists all anniversaries for today and the next 10 days. To do this, you need "Change Access" or "Full Control".
  Note: The report can be updated via the "Update Statistics" context menu.

- Settings
  With the “Settings” action you can change the settings of the personnel file shelf. For more information, see chapter 17.3 “Personnel File Shelf”.
- Permissions
  With the “Permissions” action you can define access rights for the personnel file shelf. For more information, see chapter 15.1 “Define Permissions (Personnel File Shelf)”.

5.3 Unstructured Shelves

With the context menu entry "Use Queried Lists for Personnel Files" of a personnel file shelf, it is possible to change a shelf to an unstructured or query-based view. To switch back to the structured view, there is the context menu entry "Use Saved Lists for Personnel Files".

The following lists are now unstructured/query-based:

- Personnel Files
- Closed Personnel Files

The following menus are available in the query-based lists:

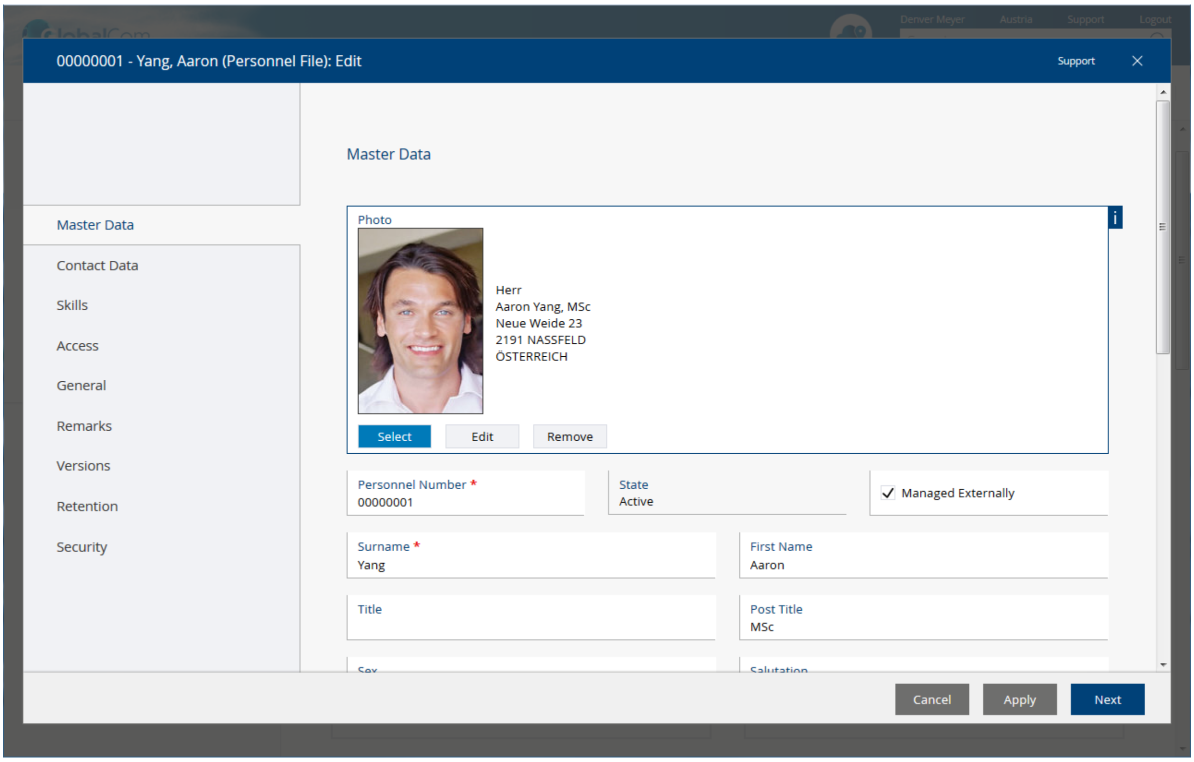
- Search
  The search function can be used to search for and restrict personnel files.
- Refresh
  The list of personnel files is updated.
- Further search functions
  Search patterns can be loaded, saved and reset.

Note:

- It only makes sense to switch to this display if there are more than 10,000 personnel files.
- The search only finds personnel files that are in the list. You cannot search for closed personnel files in the "Personnel files" list.
- If the search is not restricted, the first 10,000 personnel files are displayed in the lists.
- The following functions are not possible with an unstructured shelf:
  - Reports
    No reports from "All Personnel Files", "Closed Personnel Files", "Active Personnel Files" and "Active and Closed Personnel Files" can be generated if there is at least one unstructured shelf. This applies both to the evaluation area of the personnel file dashboard and to the evaluation area of the personnel file shelf.
  - Show Missing Qualifications
    The menu is no longer displayed if there is at least one unstructured shelf.
  - Perform Consistency Check
    The menu is no longer displayed on the shelf or on personnel files within this shelf if it is unstructured. If there were inconsistent personnel files before the switch to query-based view, these are no longer marked as inconsistent after the switch.
  - When registering a document, the hierarchy view is hidden in the "Personnel File" field if there is at least one unstructured shelf.

6 Personnel File

A personnel file is assigned to a person who is standing in an upright employment relationship with the company or will be or was in such an employment relationship.



Besides the possibility to enter metadata, documents can be stored in a personnel file. In a personnel file, an overview of all documents of the personnel file is displayed on top-level. The tree view can be used to navigate in the several personnel file folders.

Personnel files, personnel file folders and documents are filtered, if the user has no access rights.

6.1 Create Personnel File

To create a personnel file, perform the following steps:

1. Navigate in the personnel file dashboard or in the desired personnel file shelf.
2. Click the “Create Personnel File” action.
3. If you are in the personnel file dashboard and several personnel file shelves exist, select the desired personnel file shelf.
4. Enter the data on the “Master Data”, “Contact Data” and “Access” tab. At least the surname has to be specified.
    - If the personnel number is not generated automatically, you have to enter it manually. When using the manual assignment you can also enter additional personnel numbers.
    - On the “Access” tab, in the *Assigned User* field you can enter a user who corresponds with the personnel file and should get read access.
      In the *Supervisors* field, you can enter users/organizations that should get read access to all personnel files of their subordinates.

Note: If it is configured that users are taken over from the organizational structure the fields are displayed read-only.

5. Click “Next”.

More information about accessing personnel files as employee or supervisor can be found in chapter 15.3 “Personnel File”.

Note: Personnel files can only be created if a *Folder Structure for Personnel Files* is defined in the personnel file configuration.

6.2 Import Personnel Files

Personnel files can be imported and updated using a CSV file.

To import personnel files, perform the following steps:

1. Navigate in the personnel file dashboard or in the desired personnel file shelf.
2. Click the “Import Personnel Files” action.
3. Optionally, click the “Download CSV Template” button to retrieve a template that describes the necessary data structure.
4. Enter the path to the CSV file in the *Content* field.
5. Click “Start Import”.
6. After the import has finished, click “Next”.

The personnel files are stored in the personnel file shelf.

Note:

- For the personnel file import, a manual assignment of personnel numbers is required (settings of the personnel file shelf > “Numbering” tab > *Generate Personnel Number Automatically* > “No”).
- To prevent that fields (that should be updated by an import) are changed directly in the personnel file using the user environment, it is possible to set the corresponding fields read-only via the personnel file configuration or personnel file shelf on the “General Settings” tab, in the *Externally Managed Master File Data* field. This applies only to personnel files for which the “Managed Externally” option is enabled.
- In case of an error in a personnel file, the lines concerning the same personnel number are ignored.
- If the personnel file shelf is unstructured, the imported files are only displayed when the list is updated and if there is no search pattern that excludes the files.

The CSV columns are in general free-text fields of type string, number or date (`yyyy-mm-dd`). The Fabasoft Cloud ID can be found on the “General” tab of the corresponding object. The import ID can be used to update objects and assign these objects to other objects. Following CSV columns are available:

CSV Column	Field	Possible Value
`PersNum`	Personnel Number	String
`FileShelfId`	Personnel File Shelf	Fabasoft Cloud ID or Import ID (has to be specified if the import is

		carried out not in context of a personnel file shelf)
`Surname`	Surname	String
`FirstName`	First Name	String
`Sex`	Sex	1, 2 or 103 (male, female or diverse)
`Title`	Title	String
`PostTitle`	Post Title	String
`CommLanguage`	Language for Communication	Reference of a system language (e.g. `LANG_GERMAN`, `LANG_ENGLISH`)
`Salutation`	Salutation	String
`Birthday`	Date of Birth	Date
`SocialSecId`	Social Security Number	String
`PreviousNames`	All Previous Names	String
`ImageTeamroom`	Teamroom that contains employee photo	Fabasoft Cloud ID of a Teamroom
`ImageName`	Photo	Object name of an image
`EntryDate`	Entry Date	Date
`SeparationDate`	Separation Date	Date
`Birthplace`	Birthplace	String
`Nationality`	Nationality	String
`Denomination`	Denomination	String
`Company`	Company (Textual)	String
`Orgunit`	Organizational Unit (Textual)	String
`Street`	Address (Street)	String
`ZipCode`	Address (Zip Code)	String
`City`	Address (City)	String
`State`	Address (State)	String

`Country`	Address (Country)	String
`AddrTopic`	Address (Topic)	Reference of a topic (e.g. `TermBusiness`, `TermPrivate`)
`Email1`	E-Mail Address (Topic: E-Mail 1)	String
`Email2`	E-Mail Address (Topic: E-Mail 2)	String
`Email3`	E-Mail Address (Topic: E-Mail 3)	String
`Phone`	Telephone Numbers (Topic: Business)	String
`Fax`	Telephone Numbers (Topic: Fax)	String
`Mobile`	Telephone Numbers (Topic: Mobile)	String
`PrivatePhone`	Telephone Numbers (Topic: Private)	String
`BankAccountHolder`	Account Holder	String
`Iban`	IBAN	String
`Bic`	BIC	String
`Qualification`	Qualification	Import ID of the qualification (skills management)
`QualificationLevel`	Level	Import ID of the rating scale value of the qualification (skills management)
`RoleDescription`	Role Descriptions	Import ID of the role description (skills management)
`FullTimeEquivalent`	Full-Time Equivalent (in Percent)	Number
`UserId`	Assigned User	Log-in name of the user (user object)
`SupervisorId`	Direct Supervisor	E-mail address or Fabasoft Cloud ID of the user (user object)
`AllSupervisorIds`	Supervisors	E-mail addresses or Fabasoft Cloud ID of the users (separated by “|”)

`AdditionalPersNums`	Additional Personnel Numbers	String
`Remark`	Remark	String
`GrossIncomeSymbol`	Gross Income (currency)	String (e.g. EUR, USD)
`GrossIncomeValue`	Gross Income (value)	Number
`Assignments`	Assignments	Import ID of assignments, separated by commas
`OverrideKeys`	-	CSV columns of properties to be overwritten separated by commas (otherwise empty values are ignored and values are added in list properties)

Note:

- To populate fields that can consist of several rows (e.g. *Address*), it is possible to specify several rows in the CSV file with the same personnel number (`PersNum`). If the `FileShelfId` is used, it has to be specified for each line.
- If it is defined in the personnel file configuration that unique personnel numbers should be used across all personnel file shelves, existing personnel files (`PersNum`) can be moved by specifying a different `FileShelfId`.
- If a user-defined form is assigned to personnel files, these properties can also be imported (the programming name of the respective property serves as the column caption).
- If several rows with the same personnel number (`PersNum`) but different personnel file shelves (`FileShelfId`) exist, a primary personnel file shelf is determined as described below. All rows that do not correspond to this primary personnel file shelf are ignored.
  - The lines with an active employment relationship are preferred.
  - In the case of several active or inactive employment relationships, the line with the most recent entry date is preferred.
  - Rows without an entry date are considered older than rows with an entry date.
  - If there are several rows without an entry date, the first row found is used.

6.3 Upload

With the “Upload” action, you can store files in the personnel file shelf. For more information, see chapter 8.7 “Uploading a Document”.

6.4 Scan

With the “Scan” action, you can scan documents and directly store them in the personnel file shelf. For more information, see chapter 8.5 “Scanning a Document”.

6.5 Pre-Capture

With the “Pre-Capture” action, you can pre-capture documents for an automatic scan. For more information, see chapter 8.6 “Pre-Capturing a Document for a Scan”.

6.6 Create Personnel File Folder

If it is defined in the personnel file configuration or in the personnel file shelf that personnel file folders may be created on top-level, you can add personnel file folders with the “Create Personnel File Folder” context menu command. For more information, see chapter 7.1 “Creating a Personnel File Folder”.

6.7 Show New Events

In order to be able to follow changes over time of personnel files, an own overview of the history is available that can be viewed from different angles.

To view events, perform the following steps:

1. Navigate to the desired personnel file.
2. Click the “Show New Events” action.

An overview of the recent events is displayed. The “Timeline” tab visualizes the time course; the “History” provides a textual overview. The other tabs represent different groupings.

Notifications about new events

Notifications can be displayed in the welcome screen or can be subscribed via e-mail.

To define notification settings, perform the following steps:

1. In the user menu click “Notifications”.
2. Click the “Settings” button.
3. Choose about which changes and how you want to be notified. For the personnel file an own area is provided.
4. Click “Save”.

6.8 Properties

To edit a personnel file, perform the following steps:

1. Navigate to the desired personnel file.
2. Click the “Properties” action.
3. Enter the desired data and click “Next”.

Note: To access the documents of a personnel file, click on the personnel file or execute the “Open” context menu command.

Besides the usual master and contact data of an employee, you can also specify the following:

“Master Data” tab

- *Managed Externally*
  To prevent that fields (that should be updated by an import or via the SAP integration) are changed directly in the personnel file using the web environment, it is possible to set the

corresponding fields read-only. The affected fields are defined in the personnel file configuration or shelf.

“Salary” tab

- *Current Gross Salary*
  Shows the current gross salary (according to the salary history).
- *Salary History*
  Defines the gross salaries in the context of a validity period.

“Access” tab

- *Assigned User*
  In this field, you can enter the employee to whom the personnel file is assigned. This allows viewing the documents intended for employees.
- *Direct Supervisor*
  In this field, you can specify the direct supervisor. This allows viewing the documents intended for supervisors.
- *Supervisors*
  In this field, you can specify all higher-level supervisors in the hierarchy. This allows viewing the documents intended for supervisors.

Note: If it is configured that users are taken over from the organizational structure the fields are displayed read-only.

More information can be found in chapter 11 “Personnel File Access” and 15.3 “Personnel File”.

„Assignments“ tab

- *Company*
  Shows the company that is stored for the associated organizational position.
- *Location*
  Shows the location that is stored for the associated organizational position.
- *Personnel Area*
  Defines the associated personnel area.
- *Personnel Sub Area*
  Defines the associated personnel sub area.
  Note: The property is only visible if a personnel area has previously been defined.
- *Employee Group*
  Defines the associated employee group.
- *Employee Circle*
  Defines the associated employee circle.
  Note: The property is only visible if an employee circle has previously been defined.
- *Organization Key*
  Defines the associated organization key.

6.9 View as PDF

For metadata of a personnel file and associated documents, a PDF overview can be generated. If a watermark is defined in the personnel file configuration or personnel file shelf, the watermark is added to the document.

To view the personnel file as PDF, perform the following steps:

1. Navigate to the desired personnel file.
2. On the context menu of the personnel file, click “View as PDF”.

The generated PDF document will be opened automatically.

Note: With the “View List of Contents” context menu command, you can generate a PDF overview without the document contents.

6.10 Closing a Personnel File

Personnel files with a defined separation date can be closed. When closing a personnel file also the assigned documents are closed. After closing, no further changes are possible. However, canceled documents can still be deleted.

For retention-worth documents, the retention period is calculated and applied on the basis of the retention rule defined in the category. The retention period cannot be shortened anymore.

To close a personnel file, perform the following steps:

1. Navigate to the desired personnel file.
2. On the context menu of the personnel file, click “Advanced” > “Close”.
3. Click "Next" to display the overview of the personnel file.
4. Before closing, you can clean up the personnel file and deal with unwanted documents on the “Documents” and “Canceled Documents” tabs.
5. Click "Close".
   Note: If the document contains canceled documents with a category that defines a retention worthiness, a corresponding message is displayed. Click on “Remove Categories and Close” to remove the categories because no retention period can be applied to canceled documents.

The closed personnel file is stored in the “Closed Personnel File” field. The state “Closed” can be removed again using the “Advanced” > “Remove ‘Closed’ state” context menu command. This allows the personnel data to be changed again. The additional operations carried out during the closing, such as the closing of documents or the calculation of the retention period cannot be reversed.

Activity “Close File”

You also have the option to start a process for closing a personal file. To do this, execute the context menu command “Tools” > “Start New Process” on the personnel file and select the “Close File” entry in the “Prescribed Activity” field. The selected process participant has the possibility to close or not close the personnel file.

6.11 Canceling a Personnel File

Personnel files can only be removed from the personnel file shelf with the “Cancel Personnel File” command.

To cancel a personnel file, perform the following steps:

1. Navigate to the desired personnel file.
2. On the context menu of the personnel file, click “Advanced” > “Cancel”.

3. Click “Yes” to confirm the cancellation.

The canceled personnel file is stored in the “Canceled Personnel File” field. Canceled personnel files can be restored using the “Advanced” > “Restore” context menu command. Users with “Full Control” can also delete personnel files permanently (“Delete” command and removing from the wastebasket), if no retention rules are violated.

6.12 Changing the Assignment of a Personnel File

Personnel files can be moved from one personnel file shelf to another. Depending on the settings of the current personnel file shelf a copy of the personnel file is kept in the current personnel file shelf.

To change the assignment of a personnel file, perform the following steps:

1. Navigate to the desired personnel file.
2. On the context menu of the personnel file, click “Advanced” > “Change Assignment”.
3. Select the new personnel file shelf and define the personnel number if applicable. If it is configured that a copy remains in the current personnel file shelf you have to define the personnel number of the copy, too.
4. Click “Next”.
5. Define the settings which should be updated for the personnel file and click “Next”.

6.13 Working With Follow-ups

When using the follow-up functionality an e-mail can be sent to a user at a particular time. The follow-up may be defined for personnel files and individual documents.

To define a follow-up, perform the following steps:

1. Navigate to the desired object.
2. On the context menu of the object, click “Tools” > “Create Follow-Up” or “Manage Follow-Ups” (at last one follow-up is already defined).
3. If you mark the follow-up as personal (only valid for the "Send e-mail" action), it will not be visible to other users.
4. Select the *Action* that should be executed.
   - Send E-Mail
     Define *Recipients* for the e-mail. In the *Message* field, you can specify the e-mail text.
   - Start Process
     Define the process that should be executed.
     Note: The process has to be released for the organization.
5. Define the date of the follow-up. You can either specify an explicit date or let the date be calculated based on a base date field of the object. In addition, you can define whether the date should be recalculated if the base date value changes. This is mandatory if the base date does not yet have a value.
6. Click “Next”.

Upon reaching the follow-up date and after processing the automatic task the defined action will be executed.

6.14 Working With Automatic Follow-ups

If a document needs to be reviewed or renewed after a certain period of time, follow-ups are offered.

A follow-up can be defined manually via the context menu or the category that is assigned to the document already defines default follow-ups. For this purpose, in the category, in the *Default Follow-Ups* field a corresponding follow-up has to be assigned.

Sending the follow-up is based on the *Time Interval* and the *Base Date*. The base date may refer either to a date field of the document or to a date field of the assigned personnel file.

Note:

- The assigned follow-ups are canceled when removing a category.
- If the default follow-ups of a category are changed, the changes can be propagated to the documents via the “Update Settings” context meu command of a personnel file shelf.

6.15 Displaying Master Data of an Employee in SAP

To display the master data of an employee in SAP, perform the following steps:

1. Navigate to the desired personnel file.
2. On the context menu of the personnel file, click “Open SAP Personnel Master Data”.

The master data is displayed in SAP.

6.16 Access Using the File System

Personnel files can be accessed via the WebDAV protocol using the file system. To do so you have to connect a network drive in your file system browser with following URL: https://<server>/<vdir>/webdav

Example: https://at.cloud.fabasoft.com/folio/webdav

In the file system operations like adding or removing documents are possible.

7 Personnel File Folder

Personnel file folders are used for structuring personnel files. Besides the predefined folders that are defined in the personnel file configuration (see chapter 17.2.1 “Dashboard”) additional personnel file folders can be created manually.

7.1 Creating a Personnel File Folder

To create a personnel file folder, perform the following steps:

1. Navigate in the desired personnel file. You can only create personnel file folders on top-level, if it is correspondingly configured in the personnel file configuration or personnel file shelf. If applicable, navigate further to an existing personal file folder to create a new one within this folder.
2. Open the context menu of the personnel file or personnel file folder in the tree view and click the “Create Personnel File Folder”.
3. Enter a *Name* and possibly a *Subject*.

4. Click “Next”.

Predefined personnel file folders differ from manually created personnel file folder by a lock symbol.

7.2 Editing a Personnel File Folder

To edit a personnel file folder, perform the following steps:

1. Navigate to the desired personnel file folder.
2. On the context menu of the personnel file folder, click “Properties”.
3. Enter the desired data and click “Next”.

Following fields are available:

“Personal File Folder” tab

- *Multilingual Name*
  The name of the personnel file folder. This can be specified in several languages. When changing the language in the basic settings, the name of the folder also changes.
- *Subject*
  A description of the personnel file folder.
- *Category*
  The category of the personnel file folder.
- *Predefined Folder*
  Shows whether it is a predefined personnel file folder.
- *Personnel File*
  The personnel file folder is assigned to the personnel file that is shown in this field.

“Available Categories” tab

- *Available Categories*
  The defined categories can be assigned to documents of the personnel file folder. Only categories can be selected that are allowed in the superordinate hierarchy.

Note: When editing a personnel file folder (template) in the personnel file configuration, configuration-specific fields are provided (see chapter 17.2.1 “Dashboard”).

7.3 Canceling a Personnel File Folder

Manually defined personnel file folders can be canceled, if they are empty.

To cancel a personnel file folder, perform the following steps:

1. Navigate to the desired personnel file folder.
2. On the context menu of the personnel file folder, click “Advanced” > “Cancel”.
3. Click “Yes” to confirm the cancellation.

Note:

- Canceld personnel file folders can be found in a personnel file (“Properties” action) on the „Canceled Documents“ tab. The tab is only visible if at least one personnel file folder or document is canceled.

- Canceled personnel file folders can be put into the wastebasket by users who have at least change rights. Users with full control can permanently delete the documents, if no retention rules are violated.

8 Documents of a Personnel File

Documents in a personnel file are stored in personnel file folders in a structured way.

For storing documents in a personnel file several possibilities are available:

- Create document
- Scan document
- Pre-capture document
- Import document (e.g. drag and drop)
- Register document

Note: Documents can only be stored in personnel file folders not directly in the personnel file. However, you can still create document at top-level, because the implicit registration of the document requires selecting a personnel file folder.

8.1 Processing State

Each document has a processing state:

- In Progress
  Documents that should be changed after creating them (e.g. objective agreements) have to have the "In Progress" state. The state is visualized by a blue arrow as symbol.
- Closed
  The content of a closed document cannot be changed anymore. When closing a document a final form is generated and a version is stored. Closed documents cannot be set in progress anymore.
- Replaced
  A Document that has been replaced by another document gets the "Replaced" state.
- Canceled
  When canceling a document the "Canceled" state is set.

Note: When scanning or uploading a document the state is set to "Closed" by default. If the state should be "In Progress", you have to unmark the *Close Document* field.

State transitions:

New State Old State	In Progress	Closed	Canceled
In Progress	no	yes	yes
Closed	no	no	yes
Canceled	yes (by recovering the old state)	yes (by recovering the old state)	yes

8.2 Personnel File Document

A personnel file document can contain several documents (even of different types). Depending on the use case, you can use documents (for example, Microsoft Word document) and personnel file documents in the personnel file environment.

To create a personnel file document:

1. Navigate into the desired personnel file or personnel file folder.
2. Open the background context menu by right-clicking in the free area and select "New.
3. In the dialogue that opens, choose the "Personnel File Document" object class, provide a name and click "Next".
4. Fill in the requested data to register the personnel file document you created. In the "Documents" field, you can add one or more files to be included in the personnel file documents.

   Note: One document in the personnel file document can be defined as the main document. To do this, just select it from the "Main Document" drop-down list.
5. Click "Save". The personnel file document has been created and registered.

Notes:

- When editing a personnel file document, the main document is opened. You can edit the other documents using the properties of the personnel file document ("Personnel File Document" tab > *Documents*). If you choose however to sign the document or print it with a QR code by selecting the respective options in the context menu of the personnel file, all included documents are displayed.
- It is possible to create also personnel file document templates for example in the configuration of the Personnel File app or in the settings of a personnel file shelf. To read more about the definition of templates, visit "Defining Templates".

8.2.1 Make the Use of Personnel File Documents Mandatory

If the "Make the Use of Personnel File Documents Mandatory" setting is activated in the configuration or on a shelf, only personnel file documents can be created in a personnel file. When a document is registered, it receives a personnel file document cover and the document is used as the main document. If several documents are registered at the same time, you can decide whether the documents are filed as individual personnel file documents or summarized together in one personnel file document.

Note: With the setting "Make the Use of Personnel File Documents Mandatory" on a shelf, it is possible to overwrite the configuration settings.

8.3 Creating a Document

To create a document, perform the following steps:

1. Navigate into the desired personnel file or personnel file folder.
2. Open the background context menu by right-clicking in the free area. Then click "New".
3. Select the desired document, enter a name and click "Next".
4. Register the document to the personnel file by entering the metadata.
   Note: If you are in a personnel file folder, it is already preselected.

5. Click “Save”.

The document is stored in the personnel file folder and can be edited in the corresponding third-party product (“Edit” context menu command).

8.4 Editing a Document

To edit a document, perform the following steps:

1. Navigate in the desired document.
2. On the context menu of document, click “Edit”.

Note: Metadata of personnel files can be inserted as updateable fields in associated Word documents. The “Property” button is available in Microsoft Word on the “Insert” tab (the Fabasoft Cloud COM Add-in has to be enabled).

8.5 Scanning a Document

To scan and import a document directly on the device, perform the following steps:

1. Navigate in the desired personnel file or personnel file folder.
2. Click the “Scan” action.
3. Scan the document.
   Note: The scanner software has to be configured such that the scanned document is copied to the clipboard. If the scanner software does not support this directly, you can define the program `copytoclipboard` in the post-processing steps of your scanner software. The program can be downloaded from the scan dialog.
4. After the document has been copied to the clipboard, click “Yes” to confirm the upload of the document.
5. If you are at top level in a personnel file, select the desired personnel file folder in which the document should be stored. Otherwise the current personnel file folder is preselected.
6. Add metadata if desired and click “Save”.

8.6 Pre-Capturing a Document for a Scan

Paper documents can be scanned and assigned automatically to the corresponding personnel file. The assignment is carried out with a barcode that must be entered in the scan dialog.

To pre-capture a document for a scan, perform the following steps:

1. Navigate in the desired personnel file or personnel file folder.
2. Click the “Pre-Capture” action.
3. If you are at top level in a personnel file, select the desired personnel file folder in which the document should be stored. Enter the barcode that resides on the paper document. Additionally, enter a name for the document.
4. Click “Pre-Capture Document”.

An empty document is created at once. As soon as the document is scanned the content is taken over in the document. In the personnel file shelf, in the “Scan Queue” field you can find the documents to be scanned.

Note:

- The “Pre-Capture” action is only available, if it is activated in the personnel file shelf.
- Your system administrator has to configure the scanner software such that the scanned document is uploaded to Fabasoft Folio via a web service (see chapter 17.4 “Providing the Scan Functionality”).

8.7 Uploading a Document

To upload a document, perform the following steps:

1. Navigate in the desired personnel file or personnel file folder.
2. You can import files using drag and drop, the shortcuts `Ctrl + C` and `Ctrl + V` or the “Upload” action.
   Note: Depending on the web browser not all possibilities may be available.
3. Enter a name and select a personnel file folder if applicable. You can also enter further metadata.
4. Click “Save”.

8.8 Defining the Validity of a Document

Documents that need to be renewed recurrently can be provided with a validity deadline.

To define the validity of a document, perform the following steps:

1. Navigate to the desired document.
2. On the context menu of the document, click “Properties“.
3. On the “Document” tab you can enter a date in the *Valid from* and *Valid to* fields.
4. Click “Next”.

Note: If a document is not yet valid or expired, it is indicated with a red exclamation mark.

8.9 Signing a Document

Documents can be manually signed with signatures like “Approve” or “Release”.

To sign a document, perform the following steps:

1. Navigate to the desired document.
2. On the context menu of the document, click “Tools” > “Manual Signatures”.
3. Enter values in the fields *Signature Type*, *Remark*, *Signed on/at* and *Manually Signed by* and click “Add”. In the *Manual Signatures* field all previous signatures and the currently added signature are shown.
   You can repeat this step to sign the document with further signatures.
4. Click “Next” to apply the signatures.

Note: The signatures can also be viewed in the metadata of the document (“Signatures” tab). The tab is only visible, if at least one signature exists.

8.10 Classifying and Registering a Document

When a Mindbreeze InSpire service is available for automatic classification, metadata is extracted from the document (if possible) and the registration form is prefilled with this data.

The classification and registration of a document that has not yet been classified and registered can be done either by means of the “Classifying and Registering” context menu command or by placing it directly in a personal file or personnel file folder.

Note: The functionality is only available, if the Mindbreeze InSpire Service is configured correspondingly.

To classify and register a document, perform the following steps:

1. Navigate to the desired document.
2. On the context menu of the document, click “Classify and Register“.
   Note: The command is not available if the document is already classified. The category assigned to the document can also cause that the command is not present. Alternatively, you can directly copy the document in the desired personnel file folder.
3. If possible, metadata retrieved from the document is prefilled and highlighted in color.
4. Check and, if necessary, add metadata and click “Save”.

8.11 Registering a Document

Documents that are not registered to a personnel file can be registered using the “Register as Personnel File Document” context menu command. Alternatively, a document can also be directly copied in a personnel file or personnel file folder.

To register a document, perform the following steps:

1. Navigate to the desired document.
2. On the context menu of the document, click “Register as Personnel File Document“.
   Note: The command is not available if the document is already registered. The category assigned to the document can also cause that the command is not present. Alternatively, you can directly copy the document in the desired personnel file or personnel file folder.
3. Select the personnel file and personnel file folder the document should be registered to.
4. Add metadata if desired and click “Save”.

8.12 Re-registering a Document

Documents that are registered to a wrong personnel file or personnel file folder can be re-registered.

To re-register a document, perform the following steps:

1. Navigate to the desired document.
2. On the context menu of the document, click “Re-register“.
3. Select the personnel file and personnel file folder the document should be registered to.
4. Add metadata if desired and click “Save”.

The document is removed from the current personnel file folder and stored in the new personnel file folder.

8.13 Canceling a Document

A document of a personnel file cannot be deleted directly, but must first be canceled.

To cancel a document, perform the following steps:

1. Navigate to the desired document.
2. On the context menu of the document, click “Cancel Document“.
3. Click “Yes” to confirm the cancelation.

Note:

- Canceld documents can be found in a personnel file (“Properties” context menu command) on the „Canceled Documents“ tab. The tab is only visible if at least one document or personnel file folder is canceled.
- Canceled documents can be put into the wastebasket by users who have at least change rights. Users with full control can permanently delete the documents, if no retention rules are violated.

8.14 Replacing a Document

A document with state “In Progress” or “Closed” can be replaced with another document. The replacing document may have a different format (e.g. a Word document can be replaced with a PDF document).

To replace a document, perform the following steps:

4. Navigate to the desired document.
5. On the context menu of the document, click “Replace“ > “Upload”.
   Note: Alternatively, you can click “Replace“ > “Scan”.
6. Choose a file the document should be replaced with and confirm uploading the file by clicking „Yes“.
7. Add metadata if desired and click “Replace”.

8.15 Registering Documents Automatically

Documents that are already in the system can be registered to personnel files using a CSV file. This method is useful if many documents should be registered.

To register documents automatically to personnel files, perform the following steps:

1. Import all documents in a Teamroom. The names of the documents have to be unique.
2. Navigate in the personnel file dashboard or in the desired personnel file shelf.
3. Click the “Register Documents” action.
4. Optionally, click the “Download CSV Template” to retrieve a template that describes the necessary data structure.
5. Enter the path to the CSV file in the *Content* field.
6. Click “Start Import”.
7. After the import has finished click “Next”.

The documents are stored in the corresponding personnel file folders.

Available CSV columns:

CSV Column	Field	Possible Value

`PersNum`	Personnel number of the personnel file	String
`FileShelfId`	Personnel File Shelf	Fabasoft Cloud ID or Import ID (has to be specified if the import is carried out not in context of a personnel file shelf)
`Folder`	Import ID of the folder that should be used to store the document	String
`Teamroom`	Fabasoft Cloud ID of the Teamroom that contains the source documents	Fabasoft Cloud ID of a Teamroom
`Document`	Import ID or name of the document that should be assigned to the personnel file	String
`DocumentName`	*Name* of the document (optional, if the name should be changed)	String
`Category`	Import ID of the category that should be assigned to the document	String
`ValidFrom`	*Valid from* of the document	Date
`ValidTo`	*Valid to* of the document	Date
`State`	*Processing State* of the document	String (`StateInProgress`, `StateClosed`)

Note: The Fabasoft Cloud ID can be found on the "General" tab of the corresponding object. The import ID can be used to update objects and assign these objects to other objects.

If a user-defined form is assigned to documents, these properties can also be imported (the programming name of the respective property serves as the column caption).

8.16 Predefining Metadata With PDF Documents

When uploading PDF documents, the keywords of the document can be used to predefine metadata.

Format: `FSC:persnum;fileshelfid;folder;category;validfrom;validto;state;`

Example:

- All metadata are predefined:
  `FSC:00002;COO.1.506.2.2177;PF_FOLDER_SALARY;PF_CAT_ZE;2013-05-23;2015-07-25;PersonnelFileDocumentInProgress;`
- *Category* and *Valid to* are not predefined:
  `FSC:00002;COO.1.506.2.2177;PF_FOLDER_SALARY;;2013-05-23;;PersonnelFileDocumentInProgress;`

9 Business Case Shelf

In a business case shelf, business cases and documents are managed, which are not assigned to a single personnel file. Bulk documents can be used to generate and store individual documents for each personnel file.

The access rights of a business case shelf can be defined using the “Permissions” action. Shelf folders are available for the hierarchical structuring of a business case shelf.

9.1 Bulk Document

A bulk document can contain several documents (also of different types). One document in the bulk document can be defined as the main document. In addition, personnel files can be specified for which personalized personnel file documents can be generated from the bulk document.

Create and Register Personnel File Documents

To use the bulk document functionality, follow these steps:

1. Navigate to the desired business case and create a bulk document.

   Note: It is possible to use a template to create a bulk document. You can also use a template that has been restricted to files from “Personnel File” - for example, a restricted Word template with fields from the Personnel File. To read more about the definition of templates, visit “Defining Templates”.
2. Specify the documents in the bulk document (one as the main document).
   Note: In Microsoft Word documents, you can insert fields that allow the document to be personalized for the relevant personnel file.
3. Define the personnel files (either individual personnel files or an entire shelf) for which a personnel file document should be generated from the bulk document. The *Excluded Personnel Files* field allows excluding a subset of personnel files.
4. The personalized personnel file documents are created using the “Bulk Document” > “Create Personnel File Documents” context menu command. The generated personnel file documents can be found in the properties of the bulk document on the “Personnel File Documents” tab.
5. Via the “Bulk Document” > “Register Personnel File Documents” context menu command, the generated personnel file documents are registered for the corresponding personnel files. You must specify the personnel file folder in which the personnel file documents are to be stored. You can also specify additional metadata.

Print Personnel File Documents

If you want to print the documents to obtain a manual signature, perform the following steps as well.

1. When carrying out the “Bulk Document” > “Print Personnel File Documents” context menu command, a single PDF document is generated from all personnel file documents with an individual QR code for each personnel file document.
2. Print the PDF document and obtain the signatures.
3. Scan the paper documents with the signatures and place them in an appropriately configured inbox.
   Note: More information about inboxes can be found in chapter 17.6 “Inbox”.
4. The action defined in the inbox is used to replace all documents in the corresponding personnel file document with the scanned document. The QR code is used to identify the personnel file document.

Start Process for Personnel File Documents

To start a process for personnel file documents, proceed as follows:

1. Execute the “Bulk Document" > “Start Process for Personnel File Documents” context menu command.
2. Select the personnel file documents for which a process is to be started. You can use the “Remove” context menu command to remove individual personnel file documents.
3. Click “Next”.
4. Define the process and click the “Start Process” button.

Remove Canceled and Deleted Personnel File Documents

If personnel file documents have been canceled or deleted, these can be removed from the bulk document using the “Bulk Document” > “Remove Canceled and Deleted Personnel File Documents” context menu command. New personnel file documents can then again be created for the removed personnel file documents.

10 Personnel File Collection

A Personnel File Collection can be created in a Teamroom and can be used to collect personnel files that are relevant for you. Fill the personnel files collection by adding shortcuts to the desired personnel files.

11 Personnel File Access

Employees or supervisors can be given access to personnel files. The access can be defined either permanently or temporarily.

The documents that employees or supervisors are allowed to view are determined by the assigned access rights.

11.1 Grant Access

The access can be granted the following way:

Permanent Access (Manually Managed in the Personnel File)

If it is configured that permanent access is manually managed in the personnel file, personnel file users can store the relevant employees or supervisors on the “Access” tab in the personnel file:

- *Assigned User*
  In this field, you can enter the employee to whom the personnel file is assigned. This allows viewing the documents intended for employees.
- *Direct Supervisor*
  In this field, you can specify the direct supervisor. This allows viewing the documents intended for supervisors.
- *Supervisors*
  In this field, you can specify all higher-level supervisors in the hierarchy. This allows viewing the documents intended for supervisors.

Permanent Access (Taken Over From the Organizational Structure)

If it is configured that permanent access is taken over from the organizational structure, the employees and/or supervisors are automatically entered in the “Access” tab of the personnel file.

Permanent Access (Via Assignments)

Via assignments such as companies or personnel areas, employees can also be granted rights to personnel files independently of the aforementioned settings in the configuration. To do this, personnel file users can select assignments in the personnel file on the “Assignments” tab. Employees then receive read or change rights to the personnel file via the rights defined in the selected assignment.

Temporary Access

Personnel file users can grant access to personnel files to employees for a limited time. To do so, navigate to the desired personnel file and execute the “Advanced” > “Grant Temporary Access” context menu command.

Following fields are available:

- *Permissions*
  Defines the permissions for temporary access.
  Note: The selectable permissions are defined in the personnel file configuration.
- *Grant Access for*
  Access is granted to the specified users.
  Note: The users defined in the permissions are preselected.
- *Start*
  Start date for temporary access.
- *End*
  End date for temporary access.
- *Enter Remark*
  The entered remark will be displayed in the remarks of the personnel file.
- *Add Attachments*
  The added attachments will be displayed in the remarks of the personnel file.

In the properties of the personnel file, on the “Access” tab, in the *Temporary Access* field the granted accesses are listed. You can also remove entries by selecting the desired rows and executing the “Remove” context menu command.

Note: Temporary access can also be granted via the “Grant Temporary Access” workflow activity.

11.2 Restrict Access

For employees or supervisors with access, all documents of the personnel files are readable by default. By means of categories, for which special ACLs are defined, it is possible to control which documents are not viewable or which documents should be editable.

Further information can be found in chapter 15.3 “Personnel File Access”.

11.3 Confirm Changes in the Organizational Structure

In general, the organization is not managed by personnel file users. If it is configured that the permanent access is taken over from the organizational structure, changes regarding the access of personnel files must therefore be confirmed by personnel file users. These personnel file users are defined in the personal file configuration or personal file shelf.

You can use the workflow activities “Review Access for Employee” or “Review Access for Supervisors" to accept the changes.

11.4 Use Cases for Users With Personnel Files Access

As an employee, the personnel files access provides you access to certain metadata and selected documents in your personnel file (for example, payslips). As a supervisor, you can view the personnel files of your employees. The following chapters explain how to use the personnel files access.

11.4.1 Using the Fabasoft Personnel File

All you need to be able to use the Fabasoft Personnel File is a web browser. However, it is recommended to install the Fabasoft Cloud Client to improve the ease of use. Please ask your administrator for the access data.

11.4.2 Dashboard

If you have been authorized for personal files access, the “Personnel Files Access” dashboard is available on “Home”. The dashboard is intended for employees and supervisors with personnel files access and is divided into the following areas:

- *My Master Data*
  Shows the master data of your own personnel file.
- *My Personnel File*
  Shows your own personnel file.
- *Uploaded Documents*
  Shows the documents uploaded by the employee (at least one document must be uploaded).

- *Personnel Files With Access*
  Shows the personnel files of your employees, if you have been granted permanent access.

Note: You can update the list of personnel files using the “Refresh” action, since it is updated only once a day.

11.4.3 Viewing Metadata

To view the metadata of a personnel file, perform the following steps:

1. Click the “Personnel Files Access” dashboard.
2. Click “Personnel Files With Access”.
3. Click the “Refresh” action, if the desired personnel file is not displayed.
4. Click the desired personnel file.
5. Click the “Properties” action.
6. Click the desired tab to display the corresponding metadata.
   Note: Sensitive metadata such as the social security number, gross income or denomination are not displayed to supervisors.
7. Click “Next”.

11.4.4 Viewing Documents

To view the documents of a personnel file that are available to you, perform the following steps:

1. Click the “Personnel Files Access” dashboard.
2. Click “Personnel Files With Access”.
3. Click the “Refresh” action, if the desired personnel file is not displayed.
4. Click the desired personnel file.
   The available documents are displayed in a list.
5. Click the desired document to view the preview of the document.
6. You can use the “Read” action to open the document in the corresponding third-party product.

11.4.5 Uploading Documents

The “Upload” action allows you to upload documents that can subsequently be registered by a personnel file user.

Note: The “Upload” action is only available if this functionality has been enabled in the configuration or shelf (*Members/Employees Can Upload Documents* option).

11.4.6 Using Follow-Ups

You can define follow-ups for personnel files or documents. When the follow-up date is reached, an e-mail with a link to the personnel file or document is sent to you. You can use this function, for example, if you want to check a document again in three months.

To define a follow-up, perform the following steps:

1. Navigate in the desired personnel file or document.

2. Click the “Manage Follow-ups” or “Create resubmission” action.
3. Click the “Create Follow-up” button, if you have previously used the “Manage Follow-ups” action.
4. Define the *Date* of the follow-up.
   Note: The *Time Span* field allows you to conveniently select the date for common time spans.
5. You can also enter a *Message* that should be included in the follow-up e-mail.
6. Click “Next”.

11.4.7 Using the Worklist

The personnel file provides the possibility to perform activities within a workflow. For example, an activity could be that your payslip has been stored in the personnel file. You can confirm the receipt and complete the activity by executing the “Noted” work step.

The worklist that is stored as standard on “Home”, takes you to your activities. The worklist is divided into the following areas:

- To Do
  Contains activities that you still have to process. An activity can consist of one or more work steps. A mandatory work step (shown in bold) must be carried out before the activity can be completed. Click on the desired step to perform it.
- Last Finished
  Contains the activities you have completed.
- Concerned Objects
  Contains objects that are assigned to current activities.
- Tracking
  Contains objects that are assigned to completed activities.

12 Skills Management

Skills management allows you to manage job and role descriptions and the assignment of required qualifications. Acquired qualifications and role descriptions can be assigned to personnel files. Via the organizational structure personnel files are linked to positions. Job descriptions are assigned to positions.

The lack of qualifications can be determined from the qualifications required and the qualifications acquired. In addition position reviews can be performed.

12.1 Dashboard

For skills manager, the skills management dashboard is available, which is divided into the following areas:

- *Job Descriptions*
  Shows the job descriptions for the organization.
- *Role Descriptions*
  Shows the role descriptions for the organization.

- *Qualifications*
  Shows the qualifications that can be assigned as required qualifications to job and role descriptions as well as positions. The qualifications can also be assigned to personnel files as acquired qualifications.
- *Position Reviews*
  Shows review procedures of job descriptions, tasks, powers and qualifications for the positions by supervisors.
- *Organizational Structure*
  Shows the organizational structure for the organization.
- *Personnel File Shelves*
  Shows the personnel file shelves that are used to manage the personnel files.

12.2 Importing Data

If you are in the Skills Management dashboard, you can use the “Import Data” action to import or update descriptions and qualifications using a CSV file. The "Download CSV Template" button gives you a template that describes the required data structure.

The CSV columns are generally free-text fields of the character string type. You can use the import ID to update objects. The following CSV columns are available:

CSV Column	Field	Possible Value
`Id`	Import ID	String
`Class`	-	String (object class; `Qualification`, `JobDescription`, `RoleDescription`)
`Name`	Name	String
`Description`	Description	String
`RatingScale`	Rating Scale	String (import ID of the rating scale; only for qualifications)
`TasksPermissions`	Tasks and Powers	String (only for job and role descriptions)
`ReqQualification`	Qualification (Required Qualifications)	String (import ID of the qualification; only for job and role descriptions)
`ReqQualificationLevel`	Level (Required Qualifications)	String (import ID of the rating scale value of the qualification; only for job and role descriptions)

To populate fields that can consist of several rows (e.g. *Required Qualifications*), it is possible to specify several rows in the CSV file with the same `Id`.

12.3 Managing Qualifications

Navigate as a skills manager in the skills management dashboard in the qualifications widget.

Edit Rating Scales

Rating scales are used to quantify qualifications (for example, failed/passed). You can use the "Edit Rating Scales" action to change, add or delete the predefined rating scales.

The values of a rating scale consist of a name and a percentage of fulfillment (e.g. Failed 0 %, Passed 100 %).

Define Qualification Categories

A qualification category defines individual qualifications within an area of competence. You can use this function as demonstrated in the following examples:

- Add qualifications such as "English", "German", and "Italian" to the qualification category "Language Skills" to combine the languages that are relevant to your company.
- Add qualifications such as "Java", "MySQL" and "English" to the qualification category "Junior Developer" to combine the skills that are relevant for this specific position.

When selecting qualifications for job descriptions, role descriptions, and organizational structures, the qualification categories can be selected from a tree view. In the tree view, qualifications without a category are available via the tree item "Uncategorized Qualifications".

Create Qualifications

You can use the "Create Qualification" action to define qualifications that can be assigned to job and role descriptions and positions.

The following fields are available:

- *Name*
  The name of the qualification.
- *Description*
  A more detailed description of the qualification.
- *Rating Scale*
  Defines the appropriate rating scale for the qualification.
- *Import ID*
  If qualifications are managed externally, a unique ID for the import identification can be defined.

12.4 Managing Job Descriptions

A job description is used to determine the tasks and powers of an employee. In addition, the qualifications required for the position are defined.

As a skills manager navigate in the skills management dashboard in the job descriptions widget.

Create Job Description

You can use the "Create Job Description" action to define a job description.

The following fields are available:

- *Name*
  The name of the job description.
- *Description*
  A more detailed description of the job description.
- *Tasks and Powers*
  Defines the tasks and powers of an employee with this position.
- *Required Qualifications*
  Defines the necessary qualifications for the position. For the qualifications it can be determined which degree of fulfillment is at least necessary.
- *Import ID*
  If job descriptions are managed externally, a unique ID for the import identification can be defined.

12.5 Managing Role Descriptions

A roles description is used to determine the tasks and powers an employee has independent of the position (e.g. first responder). In addition, the qualifications required for the role are defined.

As a skills manager navigate in the skills management dashboard in the role descriptions widget.

Create Role Description

You can use the “Create Role Description” action to define a role description.

The following fields are available:

- *Name*
  The name of the role description.
- *Description*
  A more detailed description of the role description.
- *Tasks and Powers*
  Defines the tasks and powers of an employee with this role.
- *Required Qualifications*
  Defines the necessary qualifications for the role. For the qualifications it can be determined which degree of fulfillment is at least necessary.
- *Import ID*
  If role descriptions are managed externally, a unique ID for the import identification can be defined.

12.6 Managing the Organizational Structure

The organizational structure (organizational units and positions) can be managed by organization administrators or by organizational members who have been authorized by the “Manage Organizational Structure” policy. This concerns, for example, the assignment of users to positions. More information can be found in the “Administration Help Fabasoft Cloud” in the “Manage the Organizational Structure” chapter.

Note: Personnel file-specific properties of an organizational position, such as the personnel file, can only be managed in the personnel file, but not in the organization's member administration.

Access

The access for employees or supervisors can be taken over from the organizational structure. This can be defined in the *Permanent Access for Employees* or *Permanent Access for Supervisors* fields. The corresponding fields in the personnel file are displayed read-only.

In addition, a user or a team has to be defined, which should receive activities concerning relevant changes for the personnel file. This is necessary because the organization can be managed by users who do not have permissions in the personnel files. Via the “Review Access for Employee” and “Review Access for Supervisors” activities the changes can be accepted.

12.6.1 Import Organizational Structures

In addition to the basic properties of an organizational position, other properties of the personnel file can also be imported in the personnel file and in skills management. This is possible either via the ‘Import Organizational Structure’ menu in the personnel file or by importing via an inbox folder. There are the import definitions “Import Organizational Structure (Cloud Organization)”, “Import Organizational Structure (Cloud Organization, Personnel File)” and “Import Organizational Structure (Cloud Organization, Personnel File, Skills Management)” for the inbox folder.

Note: More information can be found in the “Administration Help Fabasoft Cloud” in the “Manage the Organizational Structure” chapter.

In addition to the CSV columns of the organizational structure from the Cloud Organization, there are also the following:

CSV-Spalte	Feld	Möglicher Wert
`PersNum`	Personnel File	String (Personnel Number of the Personnel File)
`FullTimeEquivalent`	Full-Time Equivalent of the Position (in Percent)	Number
`Company`	Company	String (import ID of the company)
`Location`	Location	String (import ID of the location)
`JobDescription`	Job Descriptions	String (import ID of the job description)
`OptQualification`	Qualifications Required on the Basis of the Job Descriptions (Qualification)	String (import ID of the qualification)

`OptQualificationLevel`	Qualifications Required on the Basis of the Job Descriptions (Required Level)	String (import ID of the required level)

12.7 Defining Assignments

Once the qualifications, job descriptions, role descriptions and the organizational structure have been defined, the individual elements can be put in relationship to each other.

Assign a Personnel File to a Position

As a personnel file user, you are entitled to assign personnel files to positions. To do this, navigate to the organizational structure in your personnel file dashboard. In the properties of the desired position you can assign the appropriate personnel file in the *Personnel File* field. In addition, you can edit the fields *Full-Time Equivalent of the Position (In Percent)*, *Company* and *Location*.

Assign Job Descriptions to a Position

As a skills manager, you are entitled to assign the job descriptions and the additionally required qualifications to positions. To do this, navigate to the organizational structure in your skills management dashboard or personnel file dashboard. In the properties of the position you can enter job descriptions and additional qualifications in the appropriate fields.

Assign Acquired Qualifications and Role Descriptions to a Personnel File

As skills manager you are entitled to enter the acquired qualifications in personnel files.

Navigate in your skills management dashboard in the organizational structure. Open the properties of the corresponding position. On the “Position” tab, in the *Personnel File* field, the personnel file is stored. Open the properties of the personnel file. On the “Qualifications” tab, you can define the qualifications acquired.

12.8 Showing Missing Qualifications

After the assignments have been carried out, the missing qualifications for the individual employees can be determined based on the difference between the actual qualifications (defined in the personnel files) and the target qualifications (defined in the positions).

To do this, navigate as a skills manager in your skills management dashboard and click the “Show Missing Qualifications” action. If you are in an organizational unit, only positions are considered that are directly or indirectly subordinate. An overview of the missing qualifications is displayed and it can be exported as a CSV file.

12.9 Position Reviews

Job descriptions must be regularly reviewed by the skills managers, in co-operation with the supervisor, with regard to the defined tasks, powers and qualifications.

Skills Manager: Start the Position Review

As a skills manager navigate in your skills management dashboard in the position reviews.

The “Start Position Review” action allows initiating the position review by the head of an organizational unit for subordinate positions. In the “Positions” field, you can view all the positions for which a review process will be initiated once you click “Start”. If you do not wish to start a review for all the listed positions, just put a tick on the left of only those positions that need to be reviewed and then click “Start”.

You have the option of defining a date for the completion and whether the subordinate organizational units should also be considered. The heads of the organizational units are by default the review process recipients, i.e. they receive the corresponding activities in their worklist. However, you are allowed to change the process recipient if you wish. Just expand the drop-down list and choose the desired user.

Head: “Review Job Description” Activity

The heads of the organizational units receive the “Review Job Description” activity for each assigned position. The “Review” working step allows you to view the current descriptions. In case that reworking is required, select in the *Rework* field the “Necessary” entry and enter remarks. With the “Done” working step, you end the review. In addition, the steps “Define Acquired Qualifications” and “Request Further Training” are available. When you request further training, a process is started and the person responsible for further trainings defined in personnel file configuration receives an activity.

Note: As skills manager, you can also request further training in the properties of a personnel file on the “Qualifications2 tab via the “Request Further Training” button.

Skills Manager: Position Reviews

In the skills management dashboard, the position reviews with status are listed under “Position Reviews”.

Status:

- In Progress
  Activity is being processed by the head.
- Rework Required
  The head has completed the review and wishes a rework.
- Done
  The head has completed the review and does not wish a rework.

If a rework is necessary, navigate in the appropriate position review:

- To change the position, execute the context menu command “Properties” on the position.
- To change a job description, execute the context menu command “Properties” on a job description.
- You can access the role descriptions by executing the context menu command "Properties" on the personnel file (“Job and Role Description” tab).

After the rework has been completed, you can use the “Close” action to complete the position review or you can trigger a further check with the “Send to Review” action.

13 Applicant Management

The applicant management enables an efficient, digital management of job applications. Applicant files, job advertisements, applications, a talent pool and corresponding workflow activities are available for this purpose.

13.1 Dashboard

Applicant managers can use the applicant management dashboard, which is divided into the following areas:

- *Current Job Applications*
  Displays the current job applications of the shelves in which you are authorized.
- *Current Applicant Files*
  Displays newly created applicant files and applicant files for which there is at least one current application.
- *Talent Pool*
  Displays the applicant files of the shelves in which you are authorized that have been added to the talent pool.
- *Job Advertisements*
  Displays the job advertisements of the shelves in which you are authorized.
- *Applicant File Shelves*
  Displays the applicant file shelves in which the applicant files are managed.

Note: The responsible personnel managers have access to their job advertisements and applications via the “Personnel File Access” dashboard.

13.2 Applicant Management Shelf

An applicant management shelf is based on a personnel file configuration, but can overwrite the settings made in it if necessary. The applicant file shelf is used to manage applicant files and define access rights.

Applicant file shelves can only be created by the personnel file administrator.

Areas

The shelf is divided into the following areas:

- *Current Job Applications*
  Displays the current applications of the shelves in which you are authorized.
- *Current Applicant Files*
  Displays newly created applicant files or applicant files for which there is at least one current application.
- *Talent Pool*
  Displays the applicant files of the shelves in which you are authorized that have been added to the talent pool.
- *Job Advertisements*
  Displays the job advertisements of the shelves in which you are authorized.
- *Closed Applicant Files*
  Displays the closed applicant files.

Settings

"Applicant Management Shelf" tab

- *Standard Category for Applicant Files in Talent Pool*
  Applicant files with commitment to the talent pool get the specified category. This way, for example, the retention period can be defined. The setting in the configuration is overwritten.

"Default Values" tab

- *Default Thesaurus for New Terms*
  If a default thesaurus is specified, new terms can be created directly during tagging.
- *Default Categories*
  When an object is created, the specified category is assigned according to the defined object class. In the *Apply to* field, you can specify whether the setting applies to instances, templates, or both.
- *Default Processes*
  When an object is created, the specified process is assigned according to the defined object class or category. In the *Apply to* field, you can specify whether the setting applies to instances, templates, or both.
- *Additional Default Background Tasks*
  When an object is created, the specified background tasks are assigned.

Note: The default properties overwrite or extend the settings in the configuration.

Access Rights

- Full Control
  Users with full control can authorize users, manage job applications, applicant files and job advertisements and edit shelf settings.
- Applicant Manager
  Applicant managers can manage job applications, applicant files and job advertisements.

13.3 Managing Applicant Files

As an applicant manager, navigate to the current applicant files in the applicant management dashboard.

The following options are available:

- You can use the "Create Applicant File" action to create an applicant file. You can enter master data and contact data.
- You can assign the applicant file to another shelf using the "Advanced" > "Change Assignment" context menu command.
- You can merge the applicant file with another file using the "Advanced" > "Merge" context menu command.
- You can assign a new job application to the applicant file using the "Create Job Application" action.
- Applicant files can only be deleted if no open job application is assigned.

The "Closed Applicant Files" area is available in the applicant file shelf. Here you will find the applicant files with no open job application.

13.4 Managing Job Advertisements

As an applicant manager, navigate to the job advertisements in the applicant management dashboard.

The following options are available:

- You can create a job advertisement using the “Create Job Advertisement” action. You must specify the responsible personnel manager. If personnel manager is subsequently changed, the change does not apply to existing job applications based on the job advertisement.
- You can define the state of the job advertisement (“In Process”, “Published”, “Closed”) in the properties of the job advertisement.
- Job advertisements can only be deleted if all assigned job applications have already been deleted.

13.5 Managing Job Applications

As an applicant manager, navigate to the current applications in the applicant management dashboard.

The following options are available:

- You can create a job application using the “Create Job Application” action. You must specify an applicant file, a job advertisement and the responsible personnel manager.
- You can use the “Switch to Applicant File” action to switch to the assigned applicant file.
- You can use the “Grant Temporary Access” action to define access.

13.6 Managing the Talent Pool

The talent pool stores closed applicant files for which the *Commitment for Talent Pool* option has been selected. In this way, applicants for whom no job is currently available can be kept as evident.

13.7 Personnel File Access

The personnel managers have access to the applications and job advertisements that concern them via the personnel file access dashboard. Employees can also receive read or change rights to applicant files via assignments.

The following areas are available:

- *Current Job Applications*
  Displays all open applications for the personnel manager (including temporary access and if contained in the *Other Personnel Managers* field).
- *Job Advertisements*
  Displays all job advertisements in which the personnel manager is entered as the responsible personnel manager.
- *Applicant Files With Access*
  Shows all applicant files to which the employee has access via assignment rights.

13.8 Website Integration

Job applications can also be created automatically using the data entered in an HTML form.

To do this, the *Enable Website Integration* option must be enabled on the “Applicant Management” tab in the personnel file configuration.

You can provide a corresponding HTML form for applications on your homepage.

Example

```
<!doctype html>
<html lang="en">
  <head>
    <meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
    <title>Job Application</title>
  </head>
  <body>
    <form name="createobjectform" action="https://at.cloud.fabasoft.com/fsc/createobject"
method="post" accept-charset="UTF-8" enctype="multipart/form-data">
      <input name="redirect" value="https://www.example.com/result.html" type="hidden">
      <input name="errorredirect" value="https://www.example.com/err.html" type="hidden">
      <input name="objectclass" value="FSCPERSONNELFILE@1.1001:ApplicantFile"
type="hidden">
      <input name="inbox" value="COO.w.x.y.z" type="hidden">
      <input name="jobadvertisement" value="COO.w.x.y.z" type="hidden">
      <label for="userfirstname">First Name</label>
      <input id="userfirstname" name="userfirstname" value="" type="text">
      <br/>
      <label for="usersurname">Surname</label>
      <input id="usersurname" name="usersurname" value="" type="text">
      <br/>
      <label for="telephone">Telephone</label>
      <input id="telephone" name="telephone" value="" type="text">
      <br/>
      <label for="emailinformation">E-Mail</label>
      <input id="emailinformation" name="emailinformation" value="" type="text">
      <br/><br/>
      <input id="afusetalentpool" name="afusetalentpool" value="true" type="checkbox">
      <label for="afusetalentpool">Talent Pool</label>
      <br/><br/>
      <label for="location1">Location</label><br/>
      <input id="location1" name="location" value="COO.w.x.y.z" type="checkbox"> Linz<br/>
      <input id="location2" name="location" value="COO.w.x.y.z" type="checkbox"> Wien<br/>
      <input id="location3" name="location" value="COO.w.x.y.z" type="checkbox"> Bern<br/>
      <br/>
      <input name="attachmentattrdef" value="FSCPERSONNELFILE@1.1001:afdocuments"
type="hidden">
      <input name="attachmentkeys" value="attachment1_COO.w.x.y.z,attachment2"
type="hidden">
      <label for="attachment1">Cover Letter</label>
      <input id="attachment1" name="attachment1_COO.w.x.y.z" type="file">
      <br/>
      <label for="attachment2">CV</label>
      <input id="attachment2" name="attachment2" type="file">
      <br/><br/>
      <input value="Send" type="submit">
      <input type="reset">
```

```
    </form>
  </body>
</html>
```

In the example above, the Fabasoft Cloud IDs must be replaced by your concrete values.

- `inbox`
  The Fabasoft Cloud ID of the applicant management shelf.
- `jobadvertisement`
  The Fabasoft Cloud ID of the job advertisement.
- `location` (optional)
  The Fabasoft Cloud IDs of the locations.
- `attachment` (optional)
  If the Fabasoft Cloud ID of a category is added with an underscore to the name attribute of a file, the category will be assigned to the document.

Further information for creating the HTML form can be found here:

https://help.cloud.fabasoft.com/index.php?topic=doc/User-Help-Fabasoft-Cloud-eng/advanced-use-cases.htm#form-inbox

13.9 Applicant Management Process

The applicant management process begins with the creation of a job application or the receipt of an application via an inbox.

A simple process flow of an applicant management process can look like this:

1. After creating an application, the applicant manager receives the “Check Job Application” activity and performs the “Forward to Responsible Personnel Manager” working step.
2. The personnel manager receives the “Edit Job Application” activity and performs the “Invite applicant” working step. Thereby appointments can be proposed.
3. The applicant manager receives the “Arrange Appointment” activity and performs the “Send appointment” working step. The agreed appointment can be communicated via the “Respond to Personnel Manager” working step.
4. The personnel manager receives the “Appointment Arranged” activity and performs the “Take Note” working step. The workflow does not continue until the day of the appointment.
5. On the application day, the personnel manager receives the “Conduct Interview” activity and performs the “Accept” working step.
6. The applicant manager receives the “Accept Applicant” activity and performs the “Send Acceptance” and “Done” working step.

Activities and Working Steps in Detail

- Check Job Application
  - Open
  - Send Receipt
    Opens an e-mail.
  - Check Allocation of Applicant File
    Must be executed if a possible duplicate is found.

    - Edit Applicant File
      Enables you to add master data.
    - Forward to Responsible Personnel Manager
      The personnel manager receives the "Edit Application" activity.
    - Discard
      Closes the job application.
    - Withdrawn
      Closes the job application.
    - Reject Without Forwarding to Personnel Manager
      The applicant manager receives the "Reject Applicant" activity.
- Edit Job Application
    - Open
    - Forward Application
      The applicant manager receives the "Forward Application" activity.
    - Need Further Information
      The applicant manager receives the "Need Further Information" activity.
    - Invite Applicant
      The applicant manager receives the "Arrange Appointment" activity.
    - Withdrawn
      The applicant manager receives the "Application Withdrawn" activity.
    - Reject
      The applicant manager receives the "Reject Applicant" activity.
- Forward Job Application
    - Open
    - Send E-Mail to Applicant
      If necessary, the applicant may be asked whether the data may be forwarded to another personnel manager.
    - Forward to Personnel Manager
      Another personnel manager can be selected.
    - Withdrawn
      Closes the job application.
- Need Further Information
    - Open
    - Send E-Mail to Applicant
      Further information may be obtained from the applicant.
    - Received Information
      The information can be forwarded and the personnel manager receives the "Edit Application" activity.
    - Withdrawn
      The personnel manager receives the "Application Withdrawn" activity.
- Reject Applicant
    - Open

  - Send Rejection to Applicant
    The applicant manager can send a rejection e-mail.
  - Done
    Closes the job application.
  - Forward to Personnel Manager
    The job application can be forwarded to another personnel manager.
  - Withdrawn
    Closes the job application.
- Arrange Appointment
  - Open
  - Send Appointment
    The applicant manager can send an appointment to the applicant by e-mail based on the proposals made by the personnel manager.
  - Respond to Personnel Manager
    If an appointment has been agreed, the personnel manager receives the “Appointment Arranged” activity. If no appointment has been made, the personnel manager receives the “Edit Application” activity.
  - Withdrawn
    The personnel manager receives the “Application Withdrawn” activity.
- Appointment Arranged
  - Open
  - Taken Note
    The personnel manager takes note of the agreed date. The workflow continues on the day of the appointment.
  - Withdrawn
    The applicant manager receives the “Application Withdrawn” activity.
  - Reject
    The applicant manager receives the “Reject Applicant” activity.
- Conduct Interview
  - Open
  - Another Interview Needed
    The applicant manager receives the “Arrange Appointment” activity.
  - Withdrawn
    The applicant manager receives the “Application Withdrawn” activity.
  - Accept
    The applicant manager receives the “Accept Applicant” activity.
  - Reject
    The applicant manager receives the “Reject Applicant” activity.
- Accept Applicant
  - Open
  - Send Acceptance
    The applicant manager can send an acceptance e-mail.

  - Forward Acceptance
    The applicant manager can inform other users of the acceptance. These users receive the “Accepted Applicant" activity.
  - Done
    Closes the job application.
  - Withdrawn
    The personnel manager receives the “Application Withdrawn” activity.
- Accepted Applicant
  - Open
  - Transfer Documents to Personnel File
    Users who are allowed to manage personnel files can transfer the applicant file to a personnel file (new or existing).
  - Take Note
    Closes the job application.
- Application Withdrawn
  - Open
  - Take Note
    Closes the job application.

14 Workflow

Tasks to be performed can also be managed using the workflow. For general information on the workflow, see the Fabasoft Cloud User Help (chapter “Workflow”).

An ad hoc process allows you to define the process flow by yourself. Consequently, you can react flexibly to situations for which no predefined processes are available. Recurring processes can be efficiently represented with predefined BPMN processes.

In particular, you can use the following activities to perform the tasks in the personnel file context:

Bulk Documents

- Edit Bulk Document
- Create Personnel File Documents
- Print Personnel File Documents
- Register Personnel File Documents

General

- Close File
- Close Document
- Replace Document
- Print Document
- Register

Note: In order to be able to use the *Assigned User*, *Supervisors* and *Direct Supervisor* properties in processes which are applicable for documents, the *Object with Personnel File Aspect* aspect must be defined in the applicability of the process.

15 Security Concept

The management of access rights is based on the defined team of the personnel file shelf. Additionally, categories can be used to assign fine-grained access rights to personnel files, personnel file folders and documents.

Finally, the security concept allows defining retention rules and access by employees and supervisors.

Note: ACL is the abbreviation for “Access Control List” and defines the access rights from a technical point of view.

15.1 Define Permissions (Personnel File Shelf)

By default only team members have access rights.

- Full Control
  Users with full control can change the settings of the personnel file shelf and delete personnel files and documents permanently (if no retention rules are violated).
- Change Access
  Users with change access can manage personnel files and documents.
- Change Access (Master Data)
  Users with change rights to master data can only manage master data of a personnel file. Furthermore, they can import personnel files, but the creation or deletion of personnel files is not possible.
- Read Access (Master Data)
  In addition to the read access all master data (except sensitive master data like birthplace, social security number, nationality, denomination, gross income, bank account and comments) is readable.
- Read Access (Restricted Master Data)
  Users with read access and restricted master data access can only read a few metadata of a personnel file. They can also navigate to personnel file folders and documents that are specified by a category. To do so users/organizations can be defined in a category on the “Permissions” tab in the *Change Access for Objects with this Category* or *Read Access for Objects with this Category* field.
  This way it can be realized, for example, that the IT department can save, cancel or restore order confirmations without having access to the remaining data of the personnel file.
- Skills Manager
  Skills manager manage qualifications, job and role descriptions and can generate overviews of missing qualifications of employees.
  They have access to all master data (except sensitive master data like birthplace, social security number, nationality, denomination, gross income, bank account and comments). Skill masters have no access to the documents of the personnel file, unless they have been authorized by a category.

Note: Access rights can also be defined by defining access for employees and supervisors.

15.2 Category

Categories of personnel files, personnel file folders and documents can define access rights, retention rules and automatic follow-ups.

15.2.1 Permissions

On the “Permissions” tab following fields are provided:

- *Default ACL for Objects with this Category*
  If an access by employees and supervisors is defined, documents can be excluded (without access) or change rights can be granted.
- *Change Access for Objects with this Category*
  Users who have not been defined as team members get change access on objects with this category.
- *Read Access for Objects with this Category*
  Users who have not been defined as team members get read access on objects with this category.

15.2.2 Retention Worthy

Retention worthy documents cannot be deleted as long as the personnel file is “Active”. The retention worthiness can be defined by the assigned category. To do so, in the category, on the “Retention” tab, the *Retention Worthy* field must be marked.

15.2.3 Retention Periods

Retention periods prevent the deletion of personnel files or documents until the time limit expires. Retention periods cannot be backdated.

Retention periods are, for example, used to prevent the deletion of documents for a certain period of time after an employee leaves the company.

Categories Define the Retention Rules

In the category of personnel files or documents a retention rule is defined (example: retention period of 30 years after an employee leaves the company).

To do so, in the category, on the “Retention” tab the *Retention Worthy* field must be marked. The *Retention Period* and *Base Date for the Beginning of the Retention Period* fields the retention period can be defined.

Apply Rules When Closing a Personnel File (Default Method)

The background task applies the rule defined in the category at a defined point in time (example: one day after the separation date the rule is applied).

Configure a default category for personnel files in the personnel file configuration or shelf. In the category, specify a default background task that starts a process that contains the “Close File” activity. For example, select “1 day” for the time interval, “After” as operator and “Separation Date (Personnel File)” entry as base date for the time interval. This will start the close process one day after the separation date. The retention periods are calculated and applied on closing.

Apply Rules With Background Tasks (Alternative Method)

The background task applies the rule defined in a category at a defined time (for example, the rule is applied one day after the separation date is reached).

The background tasks can be defined either in the personnel file configuration on the “Default Values” tab in the *Default Background Tasks* field or in the personnel file shelf on the “Default Values” tab in the *Additional Default Background Tasks* field or in the category on the “Background Tasks” tab.

In the background task, in the *Action* field the *Determine Retention Period Based on the Category* entry must be selected. The execution of the background task is based either on the *Time Interval* and the *Base Date for Time Interval* or is based on a specific *Date*. The base date may refer either to a date field of the document or on a date field of the assigned personnel file.

The background tasks assigned to the individual personnel files or documents can be viewed on the “Retention” tab in the *Background Tasks* field (only visible if at least one background task is available). The background tasks are taken from the personnel file shelf and from the assigned category. If default background tasks are changed in the personnel file shelf or category, they are not adopted automatically. An update can be performed via the context menu command “Update Background Tasks”.

15.2.4 Disposal

After the retention period documents can be deleted again. To delete documents automatically or to start a workflow to confirm the deletion, categories and background tasks can also be used.

To do so, add in the category that defines the retention period, an additional background task. In general, it makes sense to define the *Retention Period* as base date for the execution of the task. As action, you can either select “Delete Automatically”, “Delete Automatically (Documents of Closed Personnel Files Are Not Deleted)” or “Start Process”. If you want to start a process, you must also specify the process. In the process, a task with the activity “Retention Period Exceeded” should be defined.

When the background task is executed, the process is started and can be processed by the defined users in the worklist. The “Retention Period Exceeded” activity provides the steps “Delete”, “Extend Retention Period” and “Accept”.

15.3 Personnel File Access

Accessing a personnel file by the employee himself or by supervisors can be defined on the “Access” tab of a personnel file.

If certain documents should be inaccessible or changeable, a category can be used to define special ACLs:

- ACL for Personnel File Documents With Change Access for Employees
- ACL for Personnel File Documents With Change Access for Employees/Supervisors
- ACL for Personnel File Documents With Change Access for Supervisors
- ACL for Personnel File Documents Without Access for Employees
- ACL for Personnel File Documents Without Access for Employees With Change Access for Supervisors
- ACL for Personnel File Documents Without Access for Employees/Supervisors
- ACL for Personnel File Documents Without Access for Employees/Supervisors With Change Access for Users Participating in Workflow

- ACL for Personnel File Documents Without Access for Employees With Read Access for Users Participating in Workflow
- ACL for Personnel File Documents Without Access for Employees With Read Access for Supervisors/Users Participating in Workflow
- ACL for Personnel File Documents Without Access for Supervisors

15.4 Assignments

Assignments such as companies or personnel areas can be used to manage rights to personnel files and applicant files. The properties “Read Access for Files with this Assignment” and “Change Access for Files with this Assignment” can be used to define users, teams or organizational units in the same way as the authorizations for categories. The assignments can be selected in the properties of personnel files or applicant files in order to authorize employees to access specific files only.

16 SAP Integration

The SAP integration enables the following scenarios:

- Linking HR master data in SAP with the respective personnel files
- Storing payslips generated with SAP in the respective personnel files
- Export of the organizational structure from SAP and import to the Fabasoft Personnel File

16.1 Linking HR Master Data

The SAP integration allows linking HR master data in SAP with the respective personnel file. The integration is carried out with an own information type 9600 “Fabasoft Personnel File”.

Note: If new personnel files should be created via SAP, a manual assignment of personnel numbers is required (settings of the personnel file shelf > “Numbering” tab > *Generate Personnel Number Automatically* > “No”).

16.1.1 Log-in via SAP

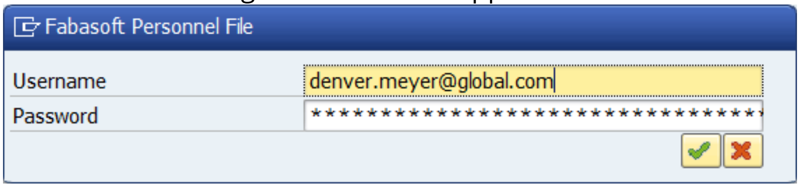
For data exchange between the Fabasoft Personnel File and SAP, you must store a password for applications in SAP. If no or no valid password is stored, the dialog for entering the credentials is automatically opened when you call a function that requires a connection to the Fabasoft Personnel File.

16.1.1.1 Defining a Password for Applications in SAP

To store the credentials in SAP, perform the following steps:

1. The password dialog is opened, for example, when you execute the “Create” command on the information type 9600 “Fabasoft Personnel File” and then click the “Personnel File” button.
   Note: If the data set for the information type 9600 has already been created, execute the “Change” command instead of “Create”.
2. In the *Username* field enter the e-mail address that you are using for logging in to the Fabasoft Personnel File. In the *Password* field enter your generated password for

applications. More information about generating such a password can be found in chapter 16.1.1.2 “Generating a Password for Applications”.



3. Click “OK”.

The password is stored in SAP and need not be entered again as long as it is valid.

16.1.1.2 Generating a Password for Applications

To generate a password for applications, perform the following steps:

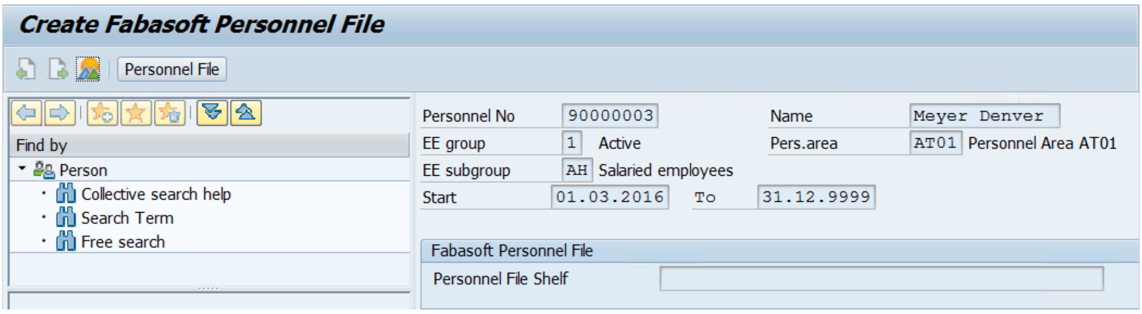
1. Navigate in your web browser to the Fabasoft Personnel File.
2. Open the account menu (your user name) and click “Access for Applications“.
3. In the *Passwords for Applications* field click “New”.
4. In the *Valid for* field select “Fabasoft Personnel File”.
5. Choose a validity period.
6. Click “Next”.
7. Copy the generated password in the clipboard, to be able to store it in SAP. For security reasons, this password is displayed only once.
8. Click “Close”.

16.1.2 Creating a Data Set for the Information Type 9600

The link of HR master data in SAP to a personal file is carried out via the information type 9600 “Fabasoft Personnel File”.

To create a data set for the information type 9600, perform the following steps:

1. Switch to the SAP GUI.
2. Run the PA30 transaction.
3. Switch to the HR master data for which the data set should be created.
4. Select the information type 9600 “Fabasoft Personnel File”.
5. Execute the “Create” command, to create the data set.
6. The “Personnel File” button can be used to directly create a new personnel file or to link to an existing one. More information can be found in chapter 16.1.3 “Managing Links to Personnel Files”.

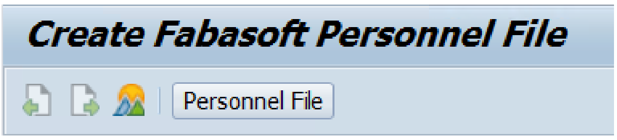


7. Click the “Save” button to store the data set.

Note: Delete the record for information type 9600 to remove the link to the personnel file. Deleting the data record has no effect on the personnel file itself.

16.1.3 Managing Links to Personnel Files

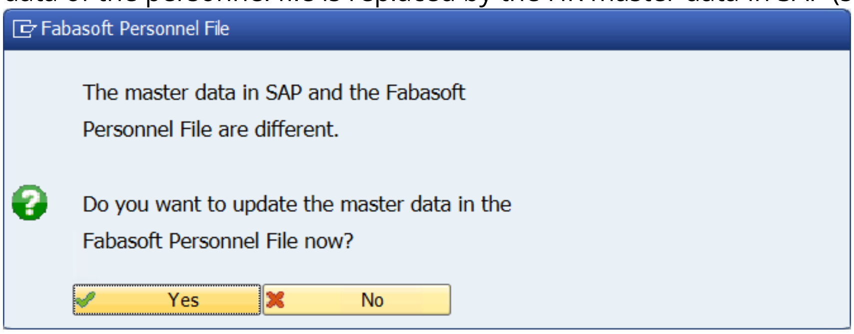
The link between the HR master data in SAP and the personnel file is managed via the “Personnel File” button of the information type 9600.



The link is based on the personnel number. When creating a link to a personnel file the corresponding personnel file shelf is automatically stored in the *Personnel File Shelf* field.

Depending on the use case you can carry out the following using the “Personnel File” button:

- If no personnel file with the personnel number exists, you can decide whether a new personnel file should be created. If several personnel file shelves exist, you can choose in which the personnel file should be created.
  Note: Canceled personnel files are considered as existing, delete personnel files (wastebasket) are considered as not existing.
- If a personnel file shelf is already stored in the information type 9600, the corresponding personnel file with the associated personnel number is opened.
- If only one personnel file with the associated personnel number exists within all personnel file shelves, the link will be automatically created. If the personnel number exists in several personnel file shelves, you can choose one personnel file shelf.
- If the HR master data in SAP differs from the personnel file you can decide whether the data of the personnel file is replaced by the HR master data in SAP (see also next chapter).



- In all use cases the linked personnel file is opened in the web browser, if you allow the access in the displayed dialog.
- If the personnel file shelf has changed you have to save the data set of the information type 9600 again. In this case open the data set with the “Change” command instead of “Display”.

16.1.4 Synchronizing HR Master Data

When opening a personnel file via SAP the following HR master data is matched and, if desired, overwritten in the personnel file:

“Master Data” tab

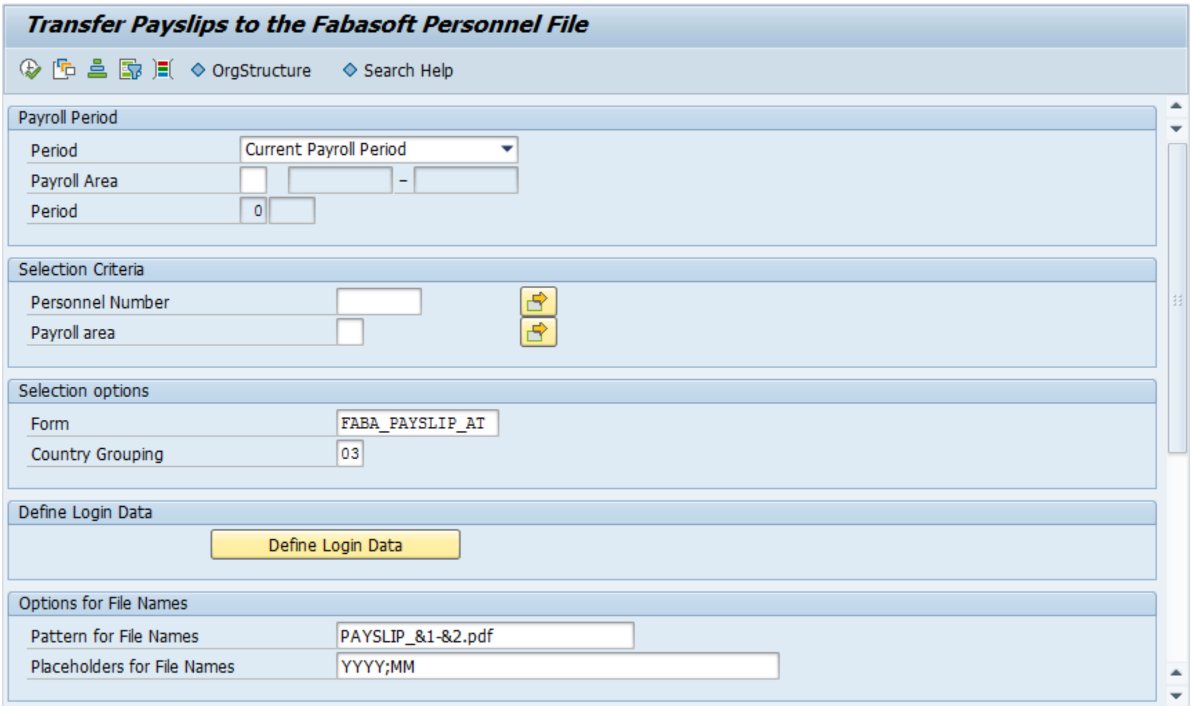
- Surname
- First Name
- Tittle
- Post Title
- All Previous Names
- Date of Birth
- Social Security Number
- Entry Date
- Separation Date

“Contact Data” tab

- Bank Account
- Address
- Telephone Numbers
- E-Mail Addresses
- Language for Communication

16.2 Storing Payslips

SAP-generated payslips can be automatically stored in the respective personnel file.



To store the payslips in the respective personnel files, perform the following steps:

1. Switch to the SAP GUI.
2. Run the SE38 or SA38 transaction and execute the report `/FABASOFT/VDN2RECM`.
   Note: Alternatively, the transaction `/FABASOFT/VDN2RECM` is also available.

3. Click “Define Login Data”. If you want to run the report interactively, enter your SAP user name (prefilled), your Fabasoft Personnel File user name (e-mail address) and the password for applications (see chapter 16.1.1.2 “Generating a Password for Applications”). Click “OK”.
   Note: If another SAP user is intended to generate the report (for example, for background processing), perform this step again to store additional log-in information.
4. Select the required payroll period and selection conditions.
5. In the *Selection Options*, select the HR form for the payslip (must correspond to the HR form specified in the configuration) and specify the *Country Grouping* of the HR form (according to the HR form definition in HRFORMS).
6. In the *Options for File Names*, specify a pattern for file names (e.g. `Payslip_&1-&2.pdf`). For the placeholders `&1`, `&2`, etc. used in the pattern, you must define a corresponding number of placeholder values separated by semicolons in the *Placeholders for File Names* field. The following placeholder values are available: `YYYYY` (year of the period, four digits), `YY` (year of the period, two digits), `MM` (month of the period) and `PERNR` (personnel number).
7. Click the “Execute” button.

16.3 Export and Import of the Organizational Structure

A CSV file describing the organizational structure can be generated from the organizational chart and employee master data available in SAP. The organizational structure can be transferred using the import mechanism of the Fabasoft Personnel File.

Export from SAP

To export the organizational plan, proceed as follows:

1. Switch to the SAP GUI.
2. Call transaction SE38 or SA38 and execute program ZHR_EXPORT_ORG.
3. Specify the following data:
   - Key Date
     The organizational structure is generated for the specified key date. If you want to save a variant that uses the current date, save the field without a value.
   - Plan Version
     Plan version 01 (current plan version) is used by default.
   - Source Object
     Defines the organizational unit that serves as root of the exported organizational structure.
   - Directory
     The CSV file is stored in the specified directory on the SAP application server.
     Note: For further use, for example, an automatic copy task can be set up at operating system level which copies the stored files to a Teamroom connected via WebDAV as a network drive.
   - File Name
     Specifies the file name of the CSV file. `<DATE>` can be used as placeholder for the key date.
   - Overwrite
     Specifies whether an existing file with the same name should be overwritten.

- With Header
  Determines whether column headers are generated in the CSV file.
- Level with “OUTLevel” Prefix
  Determines whether the prefix “OUTLevel” is added to the level of the organizational unit.

4. Click the “Execute” button.

Note: To keep the organizational structure up to date, you can create a variant with the required data and execute it in the background.

Import into the Fabasoft Personnel File

To import or update the organizational structure, perform the following steps:

1. Switch to the Fabasoft Web Client.
2. in the dashboard of the personnel file or skills management, click *Organizational Structure*.
3. Click the “Import Organizational Structure” action.
4. Select the CSV file exported from SAP.
5. Click “Start Import”.

17 Administration Tasks

In the following chapters you find administration tasks for the personnel file.

17.1 Prerequisites

To be able to use the personnel file, it is necessary that the “Personnel File” service package is activated. In addition, the service packages “Personnel File (Access)” and “Skills Management” are available as optional extensions. This can be checked in the properties of the organization (“Solutions” tab > *Solutions*).

After purchasing the service package the organization owner, organization administrators and payment user get a notification in the welcome screen that a personnel file configuration must be created.

You can forward the notification to a responsible person or create a configuration immediately. After creating a configuration, the corresponding personnel file dashboard is put on “Home” of the specified personnel file administrators and the notification will be removed from all receivers.

Note: If a personnel file administrator is removed from the configuration, the personnel file dashboard is removed from “Home” of the corresponding user.

17.2 Personnel File Configuration

In the personnel file configuration common settings, the structure of personnel files and the personnel file users are defined. The defined personnel file administrators can edit the corresponding personnel file configurations.

17.2.1 Dashboard

In the dashboard of the personnel file configuration you can define following settings. If a field is hidden, you can display it using the "View" menu.

- *Personnel File Shelves*
  The personnel file shelf is used to manage the personnel files and to specify the access rights. More information can be found in chapter 17.3 "Personnel File Shelf".
- *Applicant File Shelves*
  shows the applicant file shelves that are used to manage the applicant files.
- *Business Case Shelves*
  Shows the business case shelves that are used to manage the business cases.
- *Folder Structure for New Personnel Files*
  The defined folder structure is assigned to each newly created personnel file.
  - You can define a personnel file folder hierarchy. To do so, navigate in the tree view to a superordinate personnel file folder, open the context menu in the tree view and click the "Create Personnel File Folder" command.
  - In the personnel file folders, you can store standard documents. When creating new personnel files the personnel file folders and documents are duplicated. The document's category will be retained.
  - The predefined personnel file folders cannot be removed from a personnel file. If you need several folders only in special personnel files, define the folders manually in the corresponding personnel files.
  - A modified folder structure only applies to newly created personnel files. But you can update the folder structure of existing personnel files (see chapter 17.7 "Update Settings").
  - In the *Default Category* field a category can be defined that is assigned to the corresponding personnel file folder in the personnel file. Only categories are selectable that are defined in the *Categories* field (personnel file configuration).
    Note: The category is also propagated to documents in the personnel file folder. If the categories are restricted in the *Available Categories* field, the category is only propagated if it listed as available category.
    Categories are used to define access rights, retention rules and follow-ups.
  - With the *Available Categories* field the categories that can be assigned to documents in a personnel file folder can be restricted. Only categories can be selected that are allowed in the superordinate hierarchy.
- *Forms and Categories*
  The here defined categories can be assigned to personnel file folders and documents. Personnel file folders can restrict the defined categories.
  Forms can be used to allow employees to create objects based on the forms using the personnel file access dashboard. For example, employees can create leave requests.
- *Processes*
  Shows the available user-defined processes.
- *Templates*
  In the create dialog (e.g. "New" context menu command in a Teamroom) the templates are displayed according to the grouping by the template categories.

- *Text Modules*
  The defined text modules can be inserted into Word documents.
- *Thesauri*
  Shows the thesauri in which terms for tagging of documents can be managed. At least one thesaurus has to be created so that the tagging can be used. The default thesaurus for new terms is defined in the settings of the personnel file configuration. Thus, new terms can be created directly in the tagging process. If no standard thesaurus is specified, only the predefined terms in the thesauri can be used.
  Note: Thesauri can also be defined for personnel file shelves.
- *Presettings*
  Shows the defined display settings, search forms, and time intervals.
- *Companies*
  If a corporation consists of several companies, the defined companies can be assigned in organizational positions and applicant files.
- *Locations*
  The defined locations can be assigned in organizational positions and applicant files.
- *Personnel Areas*
  The personnel areas specified here can be assigned in the personnel files and applicant files.
- *Employee Groups*
  The employee groups specified here can be assigned in the personnel files and applicant files.
- *Organizational Keys*
  The organizational keys specified here can be assigned in the personnel files and applicant files.
- *Reports and OData Services*
  Allows the definition of report templates (see section 17.2.2) as well as of OData Services.
- *Failed Background Tasks*
  Shows failed background tasks (only visible, if at least one failed background task is available). You can perform following manual actions: “Define Next Execution”, “Send Link” and “Delete”.

Note: You can define more settings with the “Settings” action (see chapter 17.2.9 “Settings”). The “Personnel Areas”, “Employee Groups” and “Organization Key” lists must first be activated via the “Assignments” tab in the personnel file configuration.

17.2.2 Create Report Templates/Reports

To create a report in Personnel File, you need to define a report template first. Report templates can be defined in the Personnel File configuration as well as in Templates and Presettings within a Personnel File shelf. For the definition of a report template, you need to specify the scope within which the template will be used. The available scopes are:

- Applicant File Shelf (App: Applicant Management)
- Applicant Management Dashboard (App: Applicant Management)
- Personnel File Shelf (App: Digital Personnel File)
- Personnel File Dashboard (App: Digital Personnel File)

- Skills Management Dashboard (App: Skills Management)

Once a report template is created, an action for generating the corresponding report is added to the menu of the specified scope. When the action is executed, it is applied to the objects of the specified scope and a report is accordingly generated. All generated reports are listed in the "Report Results" widget, which becomes available in the corresponding scope once the first report is created.

So long as a report creation action is available in the menu, you can execute it multiple times if you want to generate multiple report instances (which will appear in "Report Results") to compare for example current with past data. If you no longer need the action, navigate to the configuration and then into the "Reports and OData Services" widget. Right-click the report template you no longer need and select "Delete".

The following report types are supported in Personnel File:

- Microsoft Excel reports
- BIRT reports

17.2.2.1 Creating an Excel Report

To create an Excel report, perform the following steps:

1. Navigate to the Personnel File configuration.
2. Click the "Reports and OData Services" widget.
3. Click "Create Report Template" in the left menu.
4. From the dialog that pops up, select "Microsoft Excel Report".
5. Fill in the provided fields to specify the attributes of the generated report and then click "Next". The provided fields are as follows:
    - *Multilingual Name*
      Defines the name of the report. You can define a report name in multiple languages.
    - *Report Language*
      Defines the language of the report content (e.g. the column headers). Note that if you select a report language, e.g. English, the action that generates the report will only be available to users with the same UI language setting, i.e. the English UI in this example. If you want this action to be visible in every UI just leave the field empty.
    - *Report Locale*
      Defines the locale of the report which determines for example the date format, etc.
    - *Format of the Report*
      Defines whether the report will be a Microsoft Excel Worksheet or a CSV file.
    - *Scope of Analysis*
      Defines for which objects the action for generating the report will be available. If for example, the scope of analysis is the Personnel File shelf, the action will be offered only within each shelf and the generated report within a shelf will include objects of this shelf only. In contrast, if you wish to create a report that will contain all objects in Personnel File, the Personnel File dashboard should be selected instead. In this case, the action for generating the report will appear in the Personnel File dashboard.
      Note: If you select *the personnel file shelf* as the scope of analysis, the action will be available within every shelf. If you want the action to appear only within a specific shelf,

navigate into this shelf, go to "*Templates and Presettings*" and Click the "Reports and OData Services" widget. Then the procedure proceeds in the same way.

- *Content of the Report*
  Defines what will be displayed in the report. The offered report content types vary based on the selected scope of analysis.
- *Include Release Versions Only*
  Excludes draft versions of objects.
- *Exceptions for Release Versions*
  Appears once the "*Include Release Versions Only*" option is activated. You can enter object types in this field (or an asterisk (*) to search) which are to be included in the report even if they are in a draft state.
- *Include Valid Objects Only*
  Includes objects in the search that are currently valid. Note that object validity can be restricted through the properties "Valid From" and "Valid Until".
- *Filter Values*
  Indicates that the result values of the report will be filtered.
- *Expression for Filtering Values*
  Appears once the "Filter Values" option is activated. It defines an app.ducx expression that filters the result values, which will be included in the report.
- *Restrict Report Creation to*
  Restricts the ability to generate the report to specific members.
  Note: If you want to define a restriction, it is recommended that you add yourself to the list temporarily in order to test and adjust the report after creating it. Remove yourself from the field afterwards.
- *Report* Columns
  It appears once the report content has been specified (see the "Content of the Report" field above). It specifies the columns that will appear in the report. You can customize the report as per your choice. Just click "Add Entry" to add more columns.
  Note: Depending on the size of the browser window, not all columns may be visible. In this case, click on "Show Details" in order to see all columns.
  For each column, you can define the following:
  - *Property*
    Indicates the field to be added as a report column.
  - *Expression for Label*
    Defines an expression for the column header.
    Note: If there is a value selected in the "Property" field, the name of the property is used as a header for the column by default and there is no need to define a custom value for the field "Expression for Label". If you define an expression manually, this expression will be used as the column header instead.
  - *Type of Column*
    Defines the desired column type.
  - *Expression for Value*
    Defines an expression for computing the value of the cell.
    Note: If there is a value selected in the "Property" field, the name of the property is used as a header for the column by default and there is no need to define a custom

value for the field “Expression for Value”. If you define an expression manually, this expression will be used instead.

- *Width*
  Defines the desired column width if necessary.

- *Filter for “Object Classes and Categories for Additional Report Columns”*
  Appears once the report content has been specified. It defines the filter for the field “Object Classes and Categories for Additional Report Columns “.
- *Object Classes and Categories for Additional Report Columns*
  Appears once the report content has been specified. It is typically used for adding multiple columns at once to the report. If for example the filter “Categories” has been selected in the above field all columns of the Category will be added to the generated report.
- *Optimize Memory Usage*
  Optimizes memory usage. It is recommended to activate this option in case of extensive reports. If activated, dynamic content of the report template is not handled.
- *Store Report Result in Personal Dashboard*
  Stores the generated report in the “Report Results” widget of the Personnel File dashboard independently of the selected scope (as a result the action that generates the report can appear for example in the menu of each shelf and once executed, the generated report will be listed in the “Report Results” widget of the Personnel File dashboard and not of the Personnel File shelf).

6. Right-click the newly created report template and in the context menu that appears, select “Release for Usage” to make the template available for use.
7. Navigate to the scope you selected (see field “Scope of Analysis” above). You will notice in the left menu a new action for the report generation. Click this action to generate an Excel report. All generated reports are listed in the “Report Results” widget of the corresponding scope, which becomes available once the first report is created.

Notes:

- You can import column definitions or formats into a report if a correspondingly designed Excel worksheet already exists. To do this, navigate to the desired report template in the configuration, select either the "Import Column Definitions" or "Import Column Formats" action in the context menu, and import the desired worksheet.
- Alternatively, you can also change the column format using a report result. To do this, navigate to the desired report, download it using the context menu command, create the desired column formats and then upload the worksheets again. Then select the action "Take Column Format " in the context menu to apply the changes to the report template.

17.2.2.2 Creating a BIRT Report

In order to define a BIRT report read the White Paper “Fabasoft Integration for Eclipse BIRT“. This document provides instructions for the configuration and subsequent handling of Eclipse BIRT as well as an example for the structure of the report.

Once you have created and exported a BIRT report file, proceed as follows:

1. Navigate to the Personnel File configuration.
2. Click the “Reports and OData Services” widget.

3. Click “Create Report Template” in the left menu.
4. From the dialog that pops up, select “BIRT Report”.
5. Fill in the provided fields to specify the attributes of the generated report and then click “Next”. The provided fields are as follows.
   - *Multilingual Name*
     Defines the name of the report. You can define a report name in multiple languages.
   - *Report Language*
     Defines the language of the report content (e.g. the column headers). Note that if you select a report language, e.g. English, the action that generates the report will only be available to users with the same UI language setting, i.e. the English UI in this example. If you want this action to be visible in every UI just leave the field empty.
   - *Report Locale*
     Defines the locale of the report which determines for example the date format, etc.
   - *Format of the Report*
     Defines the desired output format of the report.
   - *Scope of Analysis*
     Defines for which objects the action for generating the report will be available. If for example, the scope of analysis is the Personnel File shelf, the action will be offered only within each shelf and the generated report within a shelf will include objects of this shelf only. In contrast, if you wish to create a report that will contain all objects in Personnel File, the Personnel File dashboard should be selected instead. In this case, the action for generating the report will appear in the Personnel File dashboard.
     Note: If you select *the personnel file shelf* as the scope of analysis, the action will be available within every shelf. If you want the action to appear only within a specific shelf, navigate into this shelf, go to “*Templates and Presettings*” and Click the “Reports and OData Services” widget. Then the procedure proceeds in the same way.
   - *Content of the Report*
     Defines what will be displayed in the report. The offered report content types vary based on the selected scope of analysis.
   - *Include Release Versions Only*
     Excludes draft versions of objects.
   - *Exceptions for Release Versions*
     Appears once the “*Include Release Versions Only*” option is activated. You can enter object types in this field (or enter an asterisk (*) to search), which are to be included in the report even if they are in a draft state.
   - *Include Valid Objects Only*
     Includes objects in the search that are currently valid. Note that object validity can be restricted through the properties “Valid From” and “Valid Until”.
   - *Filter Values*
     Indicates that the result values of the report will be filtered.
   - *Expression for Filtering Values*
     Appears once the “Filter Values” option is activated. It defines an app.ducx expression that filters the result values, which will be included in the report.
   - *Restrict Report Creation to*
     Restricts the ability to generate the report to specific members.
     Note: If you want to define a restriction, it is recommended that you add yourself to the

list temporarily in order to test and adjust the report after creating it. Remove yourself from the field afterwards.

   - *Store Report Result in Personal Dashboard*
     Stores the generated report in the “Report Results” widget of the Personnel File dashboard independently of the selected scope (as a result the action that generates the report can appear for example in the menu of each shelf and once executed the generated report will be listed in the “Report Results” widget of the Personnel File dashboard and not of the Personnel File shelf).
   - *Report Info*
     Defines values for the properties “Key”, “Label” and “Value”.
     Note: If these properties have values, they are fetched during report creation and are integrated into the XML that is committed to the BIRT report. They are contained in the node info (under the main node data) with any further nodes stemming from the property “Key”.
   - *Content*
     Attaches the file containing the BIRT report template.
6. Right-click the newly created report template and select “Release for Usage” in the context menu that appears to make the template available for use.
7. Navigate to the scope you selected (see field “Scope of Analysis” above). You will notice in the left menu a new action for the report generation. Click this action to generate a BIRT report. All generated reports are listed in the “Report Results” widget of the corresponding scope, which becomes available once the first report is created.

17.2.3 Create Personnel File Shelf

With the “Create Personnel File Shelf” action you can create a personnel file shelf. More information can be found in chapter 17.3 “Personnel File Shelf”.

17.2.4 Create Applicant File Shelf

With the “Create Applicant File Shelf” action you can create an applicant file shelf.

17.2.5 Create Business Case Shelf

With the “Create Business Case Shelf” action you can create a business case shelf.

17.2.6 Import Predefined Values

Predefined values for assignments (like employment type) can be imported and updated using a CSV file..

To import predefined values, perform the following steps:

1. Click the “Import Predefined Values” action.
2. Optionally, click the “Download CSV Template” to retrieve a template that describes the necessary data structure.
3. Enter the path to the CSV file in the *Content* field.
4. Click “Start Import”.
5. After the import has finished click “Next”.

The CSV columns are in general free-text fields of type string, number or date. Following CSV columns are available:

CSV Column	Field	Possible Value
`Id`	Import ID	String
`Class`	Reference	Reference of an object class (`EmployeeCompany`, `EmployeeLocation`)
`Name`	Name	String
`Description`	Description	String
`Street`	Address (Street)	String
`ZipCode`	Address (Zip Code)	Number
`City`	Address (City)	String
`State`	Address (State)	String
`Country`	Address (Country)	String
`Email1`	E-Mail Address (Topic: E-Mail 1)	String
`Email2`	E-Mail Address (Topic: E-Mail 2)	String
`Email3`	E-Mail Address (Topic: E-Mail 3)	String
`Phone`	Telephone Numbers (Topic: Business)	String
`Fax`	Telephone Numbers (Topic: Fax)	String
`CommLanguage`	Language for Communication	Reference of a system language (e.g. `LANG_GERMAN`, `LANG_ENGLISH`)
`ContainerId`	Import ID of the container (Personnel Area or Employee Group)	String

Note: The CSV columns “Street” to “CommLanguage” are only relevant for companies and locations.

17.2.7 Import Categories

Categories can be imported and updated using a CSV file..

To import categories, perform the following steps:

1. In the personnel file configuration navigate in the “Categories” area.

2. Click the “Import Categories” action.
3. Optionally, click the “Download CSV Template” to retrieve a template that describes the necessary data structure.
4. Enter the path to the CSV file in the *Content* field.
5. Click “Start Import”.
6. After the import has finished click “Next”.

The CSV columns are in general free-text fields of type string. Following CSV columns are available:

CSV Column	Field	Possible Value
`Id`	Import ID	String
`Name`	Name	String
`PersonnelFileShelfId`	Fabasoft Cloud ID or Import ID (Personnel File Shelf)	String (category is stored in the personnel file shelf)
`RetentionWorthy`	Retention Worthy	Boolean value (`true` or `false`)
`RetentionPeriod`	Retention Period	Reference of a time interval (e.g. `FSCSCHEDULE@1.1001:TimeInterval30Y00M00W00D00H00M00S`)
`RetentionBaseDate`	Base Date for the Beginning of the Retention Period	Reference of a property (e.g. `FSCSCHEDULE@1.1001:CreatedAtDateTimeDef`)
`UsableFor`	Applicable for	Reference of an object class (e.g. `FSCPERSONNELFILE@1.1001:PersonnelFileDocument`)
`CategoryACL`	Default ACL for Objects With This Category	Reference of an ACL (e.g. `FSCPERSONNELFILE@1.1001:RoomPersonnelFileEmployeeACL`)
`CatSecChange`	Change Access for Objects With This Category	E-Mail address of a user
`CatSecRead`	Read Access for Objects With This Category	E-Mail address of a user
`OverrideKeys`	-	CSV columns of properties to be overwritten separated by commas (otherwise empty values are ignored and values are added in list properties)

17.2.8 Import Folder Structure

Personnel file folder templates can be imported and updated using a CSV file.

To import personnel file folders, perform the following steps:

1. In the personnel file configuration navigate in the “Folder Structure for Personnel Files” area.
2. Click the “Import Personnel File Folders” action.
3. Optionally, click the “Download CSV Template” to retrieve a template that describes the necessary data structure.
4. Enter the path to the CSV file in the *Content* field.
5. Click “Start Import”.
6. After the import has finished click “Next”.

The CSV columns are in general free-text fields of type string. Following CSV columns are available:

CSV Column	Field	Possible Value
`Id`	Import ID	String
`Name`	Name	String
`PersonnelFileShelfId`	Fabasoft Cloud ID or Import ID (Personnel File Shelf)	String (personnel file folder is stored in the personnel file shelf)
`ParentId`	Import ID (superordinate personnel file folder)	String
`DefaultCategory`	Default Category	Import ID of a category
`Categories`	Available Categories	Import ID of a category
`OverrideKeys`	-	CSV columns of properties to be overwritten separated by commas (otherwise empty values are ignored and values are added in list properties)

17.2.9 Settings

Besides the settings in the dashboard the “Settings” action provides following possibilities:

“General Settings” tab

- *Name*
  The name of the configuration.
- *Subject*
  Defines an additional description of the configuration.

- *Mindbreeze InSpire Service*
  If Mindbreeze InSpire services for the classification of documents are available in your organization, here you can select a service, which is used when storing documents in a personal file. If you do not select one, no classification is performed.
  Note: The service only applies when documents are directly placed in a personal file. For example, if you register a document that is assigned to a Teamroom using the context menu command, the service defined in the Teamroom or the default service (when not defined) is used.
- *Holiday Table*
  Defines the holiday table to be used in the configuration context (otherwise the default holiday table is used).
- *Restrict Shortcuts Within Teamroom*
  Defines which type of shortcuts may be stored in the configuration.
- *Restrict the Downloading or Opening of Content on the Device*
  Allows to restrict team members who can open or download content on the device.
- *Restrict Team Members*
  Defines the organizations, organizational units, teams and external organizations whose members may be added to the configuration.
- *Main Administrator*
  Defines the user who will receive the automatically generated e-mail messages concerning the configuration. Otherwise, all app administrators receive the e-mail messages. The user is also listed as contact in case of missing permissions.
- *Support Team*
  The support team handles the organization-internal management of support requests in the respective context.
- *Enable Advanced Mode*
  Advanced mode includes, for example, working with multiple shelves, as well as managing templates and presettings.
- *Activate Trace Output*
  For example, as a form designer, when you use expressions for calculation or validation, it can sometimes be difficult to identify errors in the expressions. To simplify analysis, you can write trace output to the web browser console (`cooobj.Trace("string");` or `cooobj.Trace("string", value);`).

"Personnel File Configuration" tab

- *Show "Pre-Capture" Action*
  Defines whether the barcode scan functionality is available.
- *Scan Documents as*
  Defines the document type (PDF or TIFF) of the pre-captured document.
- *Root Structure is Extensible*
  Defines whether personnel file folders can be manually added to personnel files at top level (additionally to the predefined structure).
- *Make the Use of Personnel File Documents Mandatory*
  Determines whether documents in the personnel file can only be registered as personnel file documents.

- *Keep a Copy of the Personnel File When Changing the Assignment*
  Defines whether a copy of a personnel file is kept in the current personnel file shelf when the assignment is changed.
- *Externally Managed Master File Data*
  To prevent that fields (that should be updated by an import or via the SAP integration) are changed directly in the personnel file using the web environment, it is possible to set the corresponding fields read-only. This applies only to personnel files for which the "Managed Externally" option is enabled.
- *Transfer Changes in the Master Data to Other Personnel Files of the Same Person*
  Defines whether master data in personnel files that affect the same person should be transferred when changes are made.
  You can define a key for identifying the personnel files and the master data to be transferred. The selected master data is only synchronized for active personnel files.
- *Enable E-Mail Notification for Birthdays*
  Defines whether e-mail notifications for birthdays are sent to the defined supervisors and additionally defined e-mail addresses.
- *Send E-Mail Notification to Supervisors (Birthdays)*
  Defines whether e-mail notifications are sent to none, direct or all supervisors.
- *Further E-Mail Recipients (Birthdays)*
  Defines the e-mail addresses (one per line) to which the notifications should be sent.
- E-Mail Recipients (No Birthdays on the Next Day)
  Defines the e-mail addresses (one per line) to which a notification is to be sent that no employees have a birthday on the next day.
- *Enable E-Mail Notification for Anniversaries*
  Defines whether e-mail notifications for anniversaries are sent to the defined supervisors and additionally defined e-mail addresses.
- *Send E-Mail Notification to Supervisors (Anniversaries)*
  Defines whether e-mail notifications are sent to none, direct or all supervisors.
- *Further E-Mail Recipients (Anniversaries)*
  Defines the e-mail addresses (one per line) to which the notifications should be sent.
- *Language for Birthdays and Anniversaries*
  Defines the language in which the in which the reports are generated and notifications are sent.
- *Locale for Birthdays and Anniversaries*
  Defines the locale in which the in which the reports are generated and notifications are sent.

"Personnel File Access" tab

- *Permanent Access for Employees*
  Defines whether the user for employee access is taken from the organizational structure.
- *Permanent Access for Supervisors*
  Defines whether the users for supervisor access are taken from the organizational structure.
- *Changes in the Organizational Structure Regarding the Personnel File Access Are Confirmed by*

The specified user can confirm changes in the organizational structure regarding the personnel file access via the workflow.

- *Information about Changes in the Organizational Structure Is Provided by*
  The specified users receive an activity via the workflow when the organizational structure changes, a new organizational position or organizational unit is created or when an object in the organizational structure is deleted.
- *Delete Structural Change Objects After*
  Structural change objects that are created by changing the organizational structure should only be removed after a certain period of time. The time period can be defined in this property.
  Note: User-defined time periods can also be used, but these must be at least one month long.
- *Self-Managed Master Data*
  The selected master data can be edited by the user who is assigned to the personnel file.
- *Members/Employees Can Upload Documents*
  Defines whether employees are allowed to upload documents in their own list, which can subsequently be registered by a personnel file user.
- *Default Process for Uploaded Documents*
  The defined process is automatically started on documents uploaded by employees.
- *Actions in Dashboard*
  Defines actions to create form objects which are displayed in the personnel file access dashboard.
  Procedure: To do this, define the required form in the *Forms and Categories* area of the configuration and release it for use. The form can be used in the *Actions in Dashboard* field. In addition, define a title and a symbol for the action. Select a personnel file folder in which the created objects are to be stored. The personnel file folder must have a default category that allows users with access to store objects (*Change Access for Objects with this Category*). The *Expression for Determining the Visibility* field can be used to define for whom the action is displayed. The *Navigate Into the Document After Creation* property can be used to specify that the form is navigated to directly after it has been created.
- *Permissions for Temporary Access*
  The defined permissions are offered for selection when granting temporary access. The access right (“No Access”, “Read Access” and “Change Access”) can be defined per category.
- *Organizational Structure Linked*
  Indicates whether the organizational structure of the cloud organization is already linked to the personnel file. If this is not the case, functionalities related to the organizational structure, such as “Import Organizational Structure”, are not available in the personnel file.

“Numbering” tab

- *Check Uniqueness of Personnel Numbers Across All Personnel File Shelves*
  Defines whether the uniqueness of personnel numbers is checked across all personnel file shelves or only within one personnel file shelf.
- *Generate Personnel Number Automatically*
  Determines whether the personnel number is automatically generated. If not, the personnel number must be entered manually when creating a personnel file.
  Note: If personnel numbers are automatically generated, no new personnel files can be created by the import mechanism.

- *Last Used Number*
  The defined number plus one is assigned to the next created personnel file.
- *Format String*
  The number of zeros entered specifies the number of digits in the personnel number.
- *Format Prefix*
  A string that precedes the personnel number.
- *Used Format Prefixes*
  Shows an overview of format prefixes the have been used by now.

“Assignments” tab

- *Activate Company*
  Defines whether companies can be managed in the configuration and used in personnel files and applicant files.
- *Activate Location*
  Defines whether locations can be managed in the configuration and used in personnel files and applicant files.
- *Activate Personnel Area*
  Defines whether personnel areas and personnel sub areas can be managed in the configuration and used in personnel files and applicant files.
- *Activate Employee Group*
  Defines whether employee groups and employee circles can be managed in the configuration and used in personnel files and applicant files.
- *Activate Organization Key*
  Defines whether organization keys can be managed in the configuration and used in personnel files and applicant files.

“Consistency Check” tab

- *Enable Consistency Check*
  Defines whether a consistency check is performed regularly in the background for all personnel files. The check is also performed when a document is added to or removed from a personnel file.
- *Rules for the Consistency Check*
  Defines the rules for the consistency check. You can use a rule to check whether a document with the defined category exists in every personnel file. In addition to the category, other conditions can also be defined for the document.
  - *Category of the document*
    Defines that a document with this category must exist.
  - *Restrict Scope*
    Only personnel files assigned to a position that has one of the defined companies and one of the defined locations are taken into account for the consistency check.
  - *Check Personnel File Folder of the Document*
    Defines that the document must be in one of the defined personnel file folders.
  - *Check Validity of the Document*
    Defines that the document must be valid (*Valid From* and *Valid to*).

- *Check Age of the Document (Created on/at)*
  Defines that the creation date of the document must not be older than the defined time span.
- *Rule May Be Ignored for Certain Personnel Files*
  Defines whether the rule can be disabled for individual personnel files.
- *Name*
  The name of the rule.

"SAP Settings" tab

The HR master data of the current employee can be displayed via the PA30 transaction in SAP. On this tab you can define the necessary connection parameters. Consult your SAP administrator to inquire the settings.

Note: These settings allow opening the HR master data in SAP starting from the Fabasoft Personnel File ("Open SAP HR Master Data" context menu command). The SAP integration however allows opening the personnel file starting from SAP (see chapter 17.10 "SAP Integration").

"Skills Management" tab

On this tab, you can define a user who confirms further trainings. You can also manage the rating scales for qualifications.

Note: Only visible if skills management is used.

"Applicant Management" tab

On this tab, you can define the default category for applicant files in the talent pool. In addition, you can define application sources as terms. The *Enable Website Integration* option enables the automatic creation of applications via an HTML form. This gives the user for website integration access to the personnel file configuration and the applicant file shelves.

"Logos" tab

The defined logos and the background image are used for the personnel file configuration and for all personal dashboards.

"Default Values" tab

- *Default Thesaurus for New Terms*
  If a default thesaurus is specified, new terms can be created directly during tagging.
- *Default Categories*
  When an object is created, the specified category is assigned according to the defined object class. In the *Apply to* field, you can specify whether the setting applies to instances, templates, or both.
- *Default Processes*
  When an object is created, the specified process is assigned according to the defined object class or category. In the *Apply to* field, you can specify whether the setting applies to instances, templates, or both.
- *Default Background Tasks*
  When an object is created, the specified background tasks are assigned.
- *Release Process for Templates and Presettings*
  In order to use templates, text modules, forms and categories, processes and presettings,

they must be released. If a process is to be used for the release, a BPMN process diagram can be defined here. Release processes must contain the "Release for Usage" activity.

“Content Settings” tab

On this tab you can define whether a generated cover sheet should be added to PDF overviews of documents.

In addition you can define watermark settings. With the *Watermark for All Users* option you can test the settings by yourself. The settings also apply to the assigned personnel file shelves, if they do not define their own settings.

If you use watermarks, the PDF overview of a personnel file will be watermarked. In addition users with read access do not see the original documents of a personnel file but the corresponding converted and watermarked PDF documents.

17.2.10 Define Permissions

To enable users to use the personnel file, they must be authorized in the personnel file configuration. On the basis of the specified users the consumed licenses of the respective service packages are calculated.

- Full Control (read-only)
  The owner and co-owners of the organization have full access.
- Personnel File Administrator
  Personnel file administrators can edit the personnel file configuration. Users get the service package “Fabasoft Personnel File”.
- Personnel File User
  Personnel file users are entitled to use the Fabasoft Personnel File. The respective rights are defined in the personnel file shelves. Users get the service package “Fabasoft Personnel File”.
- Personnel File Access
  The access right allows read access to personnel files. Users get the service package “Fabasoft Personnel File (Access)”.
- Skills Management
  The skills management allows managing qualifications, job and role descriptions and the generation of overviews of missing qualifications of employees. Users get the service package “Skills Management”.
- Applicant Management
  The applicant management allows managing applicant files, job advertisements and job applications.

17.3 Personnel File Shelf

The personnel file shelf is based on a personnel file configuration, but the defined settings can be overwritten or extended. The personnel file shelf is used to manage the personnel files and to specify the access rights.

Settings made in the personnel file shelf override settings of the personnel file configuration (exception: “Extensions” tab).

“General Settings” tab

- *Name*
  Defines the name of the personnel file shelf.
- *Subject*
  Defines a further description.
- *App Configuration*
  The personnel file shelf inherits the settings of the assigned app configuration.
- *Mindbreeze InSpire Service*
  If Mindbreeze InSpire services for the classification of documents are available in your organization, here you can select a service, which is used when storing documents in a personal file. If you do not select one, either the service defined in the personnel file configuration is used (if defined) or no classification is performed.
  Note: The service only applies when documents are directly placed in a personal file. For example, if you register a document that is assigned to a Teamroom using the context menu command, the service defined in the Teamroom or the default service (when not defined) is used.
- *Holiday Table*
  Defines the holiday table to be used in the shelf context.
- *Restrict Shortcuts Within Teamroom*
  Defines which shortcuts can be stored in the personnel file shelf. Allows, for example, storing categories of user-defined forms.
  Note: If you want to allow categories of user-defined forms, select "Default: Allow shortcuts to all objects" because these categories are not assigned to any organization.
- *Roles That Are Allowed to Open or Download Content on the Device*
  Defines which permissions a team member must have in order to open or download content at the device.
- *Restrict Team Members*
  Defines the organizations the team members have to belong to.
- *Main Administrator*
  Defines the user who will receive the automatically generated e-mail messages concerning the shelf. Otherwise, all shelf administrators receive the e-mail messages. The user is also listed as contact in case of missing permissions.
- *Support Team*
  The support team handles the organization-internal management of support requests in the respective context.
- *Activate Trace Output*
  For example, as a form designer, when you use expressions for calculation or validation, it can sometimes be difficult to identify errors in the expressions. To simplify analysis, you can write trace output to the web browser console (`cooobj.Trace("string");` or `cooobj.Trace("string", value);`).

"Personnel File Shelf" tab

- *Calculate Statistics*
  Defines whether graphically processed statistics for the personnel files are shown in the dashboard.
- *Show "Pre-Capture" Action*
  Defines whether the barcode scan functionality is available.

- *Scan Documents as*
  Defines the document type (PDF or TIFF) of the pre-captured document.
- *Root Structure is Extensible*
  Defines whether personnel file folders can be manually added to personnel files at top level (additionally to the predefined structure).
- *Make the Use of Personnel File Documents Mandatory*
  Determines whether documents in the personnel file can only be registered as personnel file documents.
- *Display of personnel files*
  Shows which type of personnel file display is currently being used for the personnel file shelf. Either "Use Saved Lists for Personnel Files" or "Use Queried Lists for Personnel Files".
- *Keep a Copy of the Personnel File When Changing the Assignment*
  Defines whether a copy of a personnel file is kept in the current personnel file shelf when the assignment is changed.
- *Externally Managed Master File Data*
  To prevent that fields (that should be updated by an import or via the SAP integration) are changed directly in the personnel file using the web environment, it is possible to set the corresponding fields read-only. This applies only to personnel files for which the "Managed Externally" option is enabled.
- *Enable E-Mail Notification for Birthdays*
  Defines whether e-mail notifications for birthdays are sent to the defined supervisors and additionally defined e-mail addresses.
- *Send E-Mail Notification to Supervisors (Birthdays)*
  Defines whether e-mail notifications are sent to none, direct or all supervisors.
- *Further E-Mail Recipients (Birthdays)*
  Defines the e-mail addresses (one per line) to which the notifications should be sent.
- *Enable E-Mail Notification for Anniversaries*
  Defines whether e-mail notifications for anniversaries are sent to the defined supervisors and additionally defined e-mail addresses.
- *Send E-Mail Notification to Supervisors (Anniversaries)*
  Defines whether e-mail notifications are sent to none, direct or all supervisors.
- *Further E-Mail Recipients (Anniversaries)*
  Defines the e-mail addresses (one per line) to which the notifications should be sent.
- *Language for Birthdays and Anniversaries*
  Defines the language in which in which the reports are generated and the notifications are sent.
- *Locale for Birthdays and Anniversaries*
  Defines the locale in which in which the reports are generated and the notifications are sent.

"Personnel File Access" tab

- *Permanent Access for Employees*
  Defines whether the user for employee access is taken from the organizational structure.
- *Permanent Access for Supervisors*
  Defines whether the user for supervisor access is taken from the organizational structure.

- *Changes in the Organizational Structure Regarding the Personnel File Access Are Confirmed by*
  The specified users can confirm changes in the organizational structure regarding the personnel file access via the workflow.
- *Self-Managed Master Data*
  The selected master data can be edited by the user who is assigned to the personnel file.
- *Members/Employees Can Upload Documents*
  Defines whether employees are allowed to upload documents in their own list, which can subsequently be registered by a personnel file user.
- *Default Process for Uploaded Documents*
  The defined process is automatically started on documents uploaded by employees.

"Numbering" tab

- *Generate Personnel Number Automatically*
  Determines whether the personnel number is automatically generated. If not, the personnel number must be entered manually when creating a personnel file.
- *Last Used Number*
  The defined number plus one is assigned to the next created personnel file.
- *Format String*
  The number of zeros entered specifies the number of digits in the personnel number.
- *Format Prefix*
  A string that precedes the personnel number.

Note: If it is defined in the personnel file configuration that unique personnel numbers should be used across all personnel file shelves, no specific settings can be made for the personnel file shelves.

"SAP Settings" tab

The master data of the current employee can be displayed via the PA30 transaction in SAP. On this tab you can define the connection parameters. Consult your SAP administrator to inquire the necessary settings.

"Extensions" tab

- *Additional Personnel File Folders*
  Defines personnel file folders in addition to the personnel file folders defined in the personnel file configuration.
- *Additional Rules for the Consistency Check*
  Defines rules for the consistency check in addition to the rules defined in the personnel file configuration.

Note: If the personnel file shelf is unstructured, the additional rules for the consistency check are currently not displayed.

"Logos" tab

The defined logos are used for the personnel file shelf.

"Default Values" tab

- *Default Thesaurus for New Terms*
  If a default thesaurus is specified, new terms can be created directly during tagging.

- *Default Categories*
  When an object is created, the specified category is assigned according to the defined object class.
- *Additional Categories*
  Defines categories in addition to the categories defined in the configuration.
- *Default Processes*
  When an object is created, the specified process is assigned according to the defined object class.
- *Additional Default Background Tasks*
  When an object is created, the specified background tasks are assigned.

“Content Settings” tab

- *Allow Comments*
  Defines whether PDF comments can be applied to documents.
- *Allowed Types for Comments*
  Defines the allowed types of comments (public or private).
- *Preferred Type for Comments*
  Defines the type of comment initially selected when commenting (overrides the setting in the configuration or user's basic settings).
- *Users With Read Access Are Allowed to Comment Publicly*
  Defines whether users with read access are allowed to add public comments (overrides the setting in the configuration).
- *Allow Public Links*
  Defines whether public links may be published.
- *Generate Cover Sheet for PDF Overviews of Documents*
  Defines whether a cover sheet is generated for PDF overviews of documents.
- *Use Watermarks*
  If you use watermarks, the PDF overview of a personnel file will be watermarked. In addition, users with read access do not see the original documents of a personnel file but the corresponding converted and watermarked PDF documents.

17.4 Providing the Scan Functionality (Pre-Capture)

To provide the scan functionality, the scanner software must upload the document via a web service to the Fabasoft Personnel FIle (see chapter 8.6 “Pre-Capturing a Document for a Scan”).

Use Case:

The user defines a document that should be scanned (identified by a barcode). The scanner software reads the barcode on the paper document and sends the scanned file including the barcode via a web service to the Fabasoft Personnel File. The document that has been defined by the user gets populated with the scanned content.

17.5 Creating Personalized Word Templates

To create personalized Word templates, metadata (e.g. salutation or address) of personnel files can be inserted as updateable DocProperties or fields in Word documents. The “Insert DocProperties” and “Insert Field” buttons are available in Microsoft Word on the “Fabasoft Cloud” tab (the Fabasoft Folio COM Add-in has to be enabled).

17.6 Inbox

In an inbox, rules for the processing of incoming objects can be defined. A rule consists of conditions and actions.

You can create the inbox directly on “Home” (background context menu > “New” > “Inbox”). As for Teamrooms, you can also set permissions for inboxes to define the access rights.

For example, the documents can be stored in the inbox via WebDAV.

Assigning

Documents can be automatically replaced by incoming documents.

Create an inbox and define a rule. In the rule, define two actions. The first action “Assign Category” is used to assign a category to incoming documents that has set the value "Personnel File Document Incoming Category" as *Incoming Category for Registration*. The second action “Assign (Asynchronous)” is used to replace the documents. The replacement can be based on QR codes (bulk documents) or PDF keywords. The *Fabasoft Cloud ID* (e.g. COO. 1.506.4.4063) of the document whose content is to be replaced by the incoming document must be stored in the QR code or PDF keywords. For non-assignable documents, a further inbox can be defined as target. In this inbox, a rule for starting a process for the manual assignment can be defined (“Register” activity).

Classifying and Assigning Personal File Document

Incoming documents can be classified with Mindbreeze InSpire and then registered to a personnel file based on the extracted metadata.

Create an inbox and define a rule. In the rule, define two actions. The first action “Classify With Mindbreeze InSpire” is used to perform the classification with the specified Mindbreeze InSpire service. The second action “Assign Personnel File Document (Asynchronous)” is used to register the document to a personnel file. For non-assignable documents, a further inbox can be defined as target. In this inbox, a rule for starting a process for the manual assignment can be defined (“Register” activity).

For more information on defining the Mindbreeze InSpire Service, see chapter 17.9 “Classifying With Mindbreeze InSpire”.

Import Data

The content of incoming CSV files can be imported automatically.

You can download templates for the CSV files via the respective manual actions (e.g. “Import Categories” action of a personnel file configuration).

Create an inbox and define a rule. In the rule, define an “Import Data” action. Define the target for the import and the type of import (e.g. import personnel files).

17.7 Update Settings

Changes to the predefined folder structure and categories are not automatically applied to existing personnel files and documents. The “Update Settings” context menu command of a personnel file shelf or a personnel file can be used to apply the changes.

- Background Tasks
  Changes to the *Default Background Tasks* of the personnel file configuration, personnel file shelf and categories are applied.
- Follow-Ups
  Changes to the *Default Follow-Ups* of the categories are applied.
- ACL Object (Access Rights)
  The *Default ACL for Objects with this Category* of the category is applied, if an ACL is defined.
- Folder Structure
  Changes in the predefined folder structure are applied. This includes adding, removing and modifying folders.
  Removed predefined folders will be deleted, if they are empty. If not, the folder is marked as not predefined and can therefore be handled manually (this behavior can be changed by the next option such that contents are moved to the parent folder if possible).
  When changing predefined folders the name, the subject, the default category and the available categories are taken into account.
- Move Documents From Deleted Folders to the Superordinate Folder
  If predefined folders were removed, the corresponding folders will be deleted and the content is moved to the superordinate folder. If the removed predefined folder is a top-level folder, the folder will remain (if there is a content) and will be marked as not predefined.

Note: The “Update Settings” context menu command is also provided for applicant file shelves and applicant files. It can be used to update background tasks, follow-ups and ACL objects.

17.8 Perform a Consistency Check

If rules for the consistency check have been defined in the personnel file configuration or in the personnel file shelf, a consistency check is performed regularly in the background for all personnel files. The check is also performed when a document is added to or removed from a personnel file.

The consistency check can also be performed manually on a personnel file shelf or personnel file using the “Perform Consistency Check” context menu command. Inconsistencies are visualized in the affected personnel files or documents with a corresponding status symbol. A list of all inconsistent personnel files can be found in the “Inconsistent Personnel Files” widget.

If you have defined that a rule may be ignored for individual personnel files, you can disable the rule in the properties of the affected personnel file on the “Consistency Check” tab using the “Ignore Rule for This File” context menu command. To enable the rule again, you can use the “Check Rule for This File” context menu command.

These functionalities are currently only available for structured personnel file shelves. The consistency check is currently not available in unstructured personnel file shelves.

17.9 Classifying With Mindbreeze InSpire

To enable automatic classification with Mindbreeze InSpire, a Mindbreeze InSpire service must be configured. Mindbreeze InSpire services can be created in the organization (“Advanced Settings”) and can be selected in the personal file configuration or personal file shelf. Contact Mindbreeze InSpire Support to determine the specific settings for the service.

The following steps explain the basic operation:

1. In a learning phase, Mindbreeze InSpire is trained to classify the documents. For the extraction of the metadata from documents, regular expressions can be defined.
2. In the productive mode, when executing the "Classify and Register" context menu command or when directly storing documents in a personal file, the classification and the metadata are requested from the Mindbreeze Inspire service.
3. For the classification value, a category with a corresponding import ID is searched and assigned to the document.
4. **Classify and register using the context menu**
   If a category is found that is defined in a personnel file configuration, registration is started as a personnel file document.
   Classify and register by direct storage
   Regardless of the category found, registration is started as a personnel file document.
   Classify with an inbox
   Classifying can also be carried out automatically via an inbox.
5. If metadata can be obtained from the document, it will be prefilled. The reference of the respective property is used as key.
   Note: If the Mindbreeze InSpire keys do not correspond to the personnel file keys, a corresponding mapping must be defined in the Mindbreeze InSpire service.

The Fabasoft Personnel File provides the following keys for the automatic identification of a personnel file:

Personnel File Key	Description
`FSCPERSONNELFILE_1_1001_persfileshelfid`	personnel file shelf (Fabasoft Cloud ID or import ID; optional)
`FSCPERSONNELFILE_1_1001_pfpersnum`	personnel number
`FSCPERSONNELFILE_1_1001_pfsocialsecid`	social security number
`COOSYSTEM_1_1_userfirstname`	first name
`COOSYSTEM_1_1_usersurname`	surname
`fullname`	first name and surname
`FSCFOLIO_1_1001_persbirthday`	birth date
`COOMAPI_1_1_emailaddress`	e-mail address

The evaluation is carried out in following order (if a match is made the remaining steps are not executed):

1. `FSCPERSONNELFILE_1_1001_pfpersnum`
2. `FSCPERSONNELFILE_1_1001_pfsocialsecid`
3. `COOSYSTEM_1_1_userfirstname`, `COOSYSTEM_1_1_usersurname` and `FSCFOLIO_1_1001_persbirthday`
4. `fullname` and `FSCFOLIO_1_1001_persbirthday`

5. COOMAPI_1_1_emailaddress

The Fabasoft Personnel File provides following key for classification:

Personnel File Key	Description
COOTC_1_1001_objcategory	category

The personnel file folder is determined via the category, but can also be defined via the FSCPERSONNELFILE_1_1001_persfilefolderid key (Fabasoft Cloud ID or import ID).

17.10 SAP Integration

The SAP integration enables the following scenarios:

- Linking HR master data in SAP with the respective personnel files
- Storing payslips generated with SAP in the respective personnel files
- Export of the organizational structure from SAP and import to the Fabasoft Personnel File

17.10.1 Linking HR Master Data

The integration for linking HR master data is carried out with an own information type 9600 “Fabasoft Personnel File” (/FABASOFT/ name space). Therefore, no direct modifications in SAP are required and update-safety is ensured.

Setting up the SAP integration is divided into the following three steps:

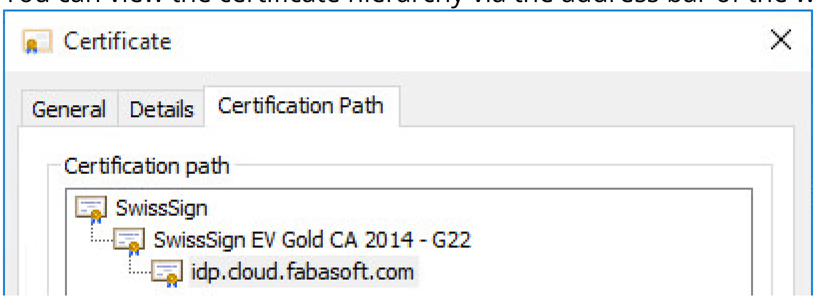
- Importing certificates
- Importing transport requests
- Configuration

17.10.1.1 Importing Certificates

For communication with the Fabasoft Personnel File, the corresponding CA certificates must be stored with the SAP SSL Server.

To import the CA certificates, perform the following steps:

1. Navigate in your web browser to the Fabasoft Personnel File.
2. You can view the certificate hierarchy via the address bar of the web browser.



3. Save all CA certificates of the hierarchy to a file. In the following, these certificates are imported into SAP.
   Note: In the case of the Fabasoft Cloud save both SwissSign CA certificates.
4. Switch to the SAP GUI.

5. Run the STRUST transaction.
6. If no “SSL Server Standard” is configured, create one with the “Create” context menu command.
7. Switch to edit mode.
8. In the *Certificate* field, you can import a CA certificate with the “Import Certificate” button and add it to the trusted certificates with the “Add to Certificate List” button. Repeat this step for all CA certificates of the Fabasoft Personnel File certificate hierarchy.
9. Save the changes.

17.10.1.2 Importing Transport Requests

The linking of HR master data requires two transfer requests, which can be downloaded here:

[Transport Requests (Fabasoft Personnel File - SAP Integration): Linking HR Master Data]

Pass the files to your SAP administrator, who can use the STMS transaction (Transport Management System) to import the transport requests and forward them, according to your compliance rules, to your production system.

Note: Before importing, make sure that the information type 9600 is not already used in your system. If this is the case, please contact the Fabasoft Support.

17.10.1.3 Configuration

After a successful execution of the transport requests, you need to configure the URLs of the Fabasoft Personnel File in SAP.

To carry out the configuration in SAP, perform the following steps:

1. Switch to the SAP GUI.
2. Run the SM30 transaction.
3. In the *Table/View* field enter “/FABASOFT/PERSF” and click “Display”.
4. Switch to edit mode.
5. Define the following values:

URL	PERSFILE	folio/personnelfile/
URL	PROTOCOL	https://
URL	WEBSRVC	folio/fscdav/wsdl?WEBSVC=FSCPERSONNELFILE_1_1001_WebServicesPersonnel
URL	WEBSRVC_DOMAIN	at.cloud.fabasoft.com/

   - `PERSFILE`
     By default (valid for the Fabasoft Cloud):
     `folio/personnelfile/`
     If you use the personnel file in the Fabasoft Private Cloud, replace `folio` with `cloud`.
   - `WEBSRVC`
     By default (valid for the Fabasoft Cloud):
     `folio/fscdav/wsdl?WEBSVC=FSCPERSONNELFILE_1_1001_WebServicesPersonnelFile`
     If you use the personnel file in the Fabasoft Private Cloud, replace `folio` with `cloud`.
   - `WEBSRVC_DOMAIN`
     By default (valid for the Fabasoft Cloud, location Austria):
     `at.cloud.fabasoft.com/`

If you use the personnel file in a different location or in the Fabasoft Private Cloud, enter the appropriate URL.

6. Save the changes.

Note: If you have also imported the transport request for storing payslips, additional configuration settings are available that are not used in this scenario.

17.10.2 Storing Payslips

SAP-generated payslips can be automatically stored in the respective personnel file.

Setting up the SAP integration is divided into the following four steps:

- Importing Certificates
- Activating HR Forms
- Importing Transport Requests
- Configuration

17.10.2.1 Importing Certificates

For communication with the Fabasoft Personnel File the corresponding CA certificates must be stored with the SAP SSL Server. If you have not yet done so, perform the steps described in chapter 17.10.1.1 “Importing Certificates”.

17.10.2.2 Activating HR Forms

Make sure that the HR form you are using for payslips is activated. For technical reasons, the HR form `SAP_PAYSLIP_AT` must also be activated.

To activate an HR form, perform the following steps:

1. Switch to the SAP GUI.
2. Run the HRFORMS transaction.
3. Open the “Utilities” menu and execute the "Activate Forms" command.
4. Select the desired HR form.
5. Select the “Generate structure and program” option.
6. Click “Execute”.

Note:

- The HR forms must be activated before the transfer request for storing payslips is imported.
- The activation must be carried out on all systems on the transport path on which the HR forms are tested or used.

17.10.2.3 Importing Transport Requests

It is required that the two transport requests for linking HR master data have been imported (see chapter 17.10.1.2 “Importing Transport Requests”).

In addition, the transport request for storing payslips must be imported. This transport request can be downloaded here:

[Transport Requests (Fabasoft Personnel File - SAP Integration): Storing Payslips]

17.10.2.4 Configuration

Once the transfer requests have been successfully executed, the report `/FABASOFT/VDN2RECM_INIT` must be executed once on the respective systems. In the *Form* field, enter the HR form you are using for the payslips and execute the report.

Note: If you want to use a different HR form, the initialization report must be executed again.

Finally, you must perform the following configuration steps:

1. Switch to the SAP GUI.
2. Run the SM30 transaction.
3. In the *Table/View* field enter “/FABASOFT/PERSF” and click “Display”.
4. Switch to edit mode.
5. Define the following values:
   - `PERSFILE`
     By default (valid for the Fabasoft Cloud):
     `folio/personnelfile/`
     If you use the personnel file in the Fabasoft Private Cloud, replace `folio` with `cloud`.
   - `VDNDOCTYPE`
     Defines the external key of the category that should be assigned to the payslip.
   - `VDNFILE`
     By default (valid for the Fabasoft Cloud):
     `folio/uploadpfdocument/`
     If you use the personnel file in the Fabasoft Private Cloud, replace `folio` with `cloud`.
   - `VDNPFREGISTER`
     Defines the external key of the personnel file folder in which the payslip should be stored.
   - `VDNSTATUS`
     Defines the document state: `PersonnelFileDocumentInProgress` or `PersonnelFileDocumentClosed`
   - `WEBSRVC`
     By default (valid for the Fabasoft Cloud):
     `folio/fscdav/wsdl?WEBSVC=FSCPERSONNELFILE_1_1001_WebServicesPersonnelFile`
     If you use the personnel file in the Fabasoft Private Cloud, replace `folio` with `cloud`.
   - `WEBSRVC_DOMAIN`
     By default (valid for the Fabasoft Cloud, location Austria):
     `at.cloud.fabasoft.com/`
     If you use the personnel file in a different location or in the Fabasoft Private Cloud, enter the appropriate URL.
6. Save the changes.

17.10.3 Export and Import of the Organizational Structure

A CSV file describing the organizational structure can be generated from the organizational chart and employee master data available in SAP. The organizational structure can be transferred using the import mechanism of the Fabasoft Personnel File.

17.10.3.1 Importing the Transport Request

The transport request needed for exporting the organizational structure can be downloaded here:

Transport Requests (Fabasoft Personnel File - SAP Integration): Exporting Organizational Structure

Pass the files to your SAP administrator, who can use the STMS transaction (Transport Management System) to import the transport requests and forward them, according to your compliance rules, to your production system.

18 Interfaces

The Fabasoft Personnel File provides following interfaces for the communication with third-party products.

18.1 URLs

The following friendly URLs are available.

Presenting a Personnel File

To present a personnel file, for example, in a web browser you can use the following URLs:

Access based on the personnel number

Syntax

```
https://<server>/<vdir>/fscasp/content/bin/fscvext.dll?ax=COO.1.1001.1.396257
&shelfid=<Fabasoft Cloud ID or Import ID of the personnel file shelf>
&persnum='<personnel number>'

https://<server>/<vdir>/personnelfile/<personnel number>/<Fabasoft Cloud ID of
the personnel file shelf>
```

Parameters:

- `shelfid`
  Fabasoft Cloud ID of the personnel file shelf.
- `persnum`
  Personnel number of the personnel file to be opened.

Example

```
https://at.cloud.fabasoft.com/folio/fscasp/content/bin/fscvext.dll?ax=COO.1.1001
.1.396257&shelfid=COO.1.3285.3.19&persnum='00001'

https://at.cloud.fabasoft.com/folio/personnelfile/00001/COO.1.3285.3.19
```

Access based on the user ID

Syntax

```
https://<server>/<vdir>/fscasp/content/bin/fscvext.dll?ax=COO.1.1001.1.396256
&shelfid=<Fabasoft Cloud ID or Import ID of the personnel file shelf>
&userid=<Fabasoft Cloud ID or e-mail address of the assigned user>
```

```
https://<server>/<vdir>/personnelfile/
```

Note: Personnel file of the currently logged in user.

```
https://<server>/<vdir>/personnelfile/<Fabasoft Cloud ID or e-mail address of
the assigned user>/<Fabasoft Cloud ID of the personnel file shelf>
```

Parameters:

- `shelfid`
  Fabasoft Cloud ID of the personnel file shelf.
- `userid`
  Fabasoft Cloud ID of the user who is assigned to the personnel file. If the `userid` is not defined, the system tries to identify a personnel file that is assigned to the currently logged in user.

Example

```
https://at.cloud.fabasoft.com/folio/fscasp/content/bin/fscvext.dll?ax=COO.1.1001
.1.396256
```

Note: Personnel file of the currently logged in user.

```
https://at.cloud.fabasoft.com/folio/fscasp/content/bin/fscvext.dll?ax=COO.1.1001
.1.396256&shelfid=COO.1.3285.3.19
```

```
https://at.cloud.fabasoft.com/folio/fscasp/content/bin/fscvext.dll?ax=COO.1.1001
.1.396256&shelfid=COO.1.3285.3.19&userid=cadence.jones@fabasoft.com
```

```
https://at.cloud.fabasoft.com/folio/fscasp/content/bin/fscvext.dll?ax=COO.1.1001
.1.396256&shelfid=COO.1.3285.3.19&userid=COO.1.3285.1.15
```

```
https://at.cloud.fabasoft.com/folio/personnelfile/
```

Note: Personnel file of the currently logged in user.

```
https://at.cloud.fabasoft.com/folio/personnelfile/cadence.jones@fabasoft.com/COO
.1.3285.3.19
```

Uploading a Document

To upload a document in a personnel file you can use following URL:

Syntax

```
https://<server>/<vdir>/uploadpfdocument/<personnel number>/<Fabasoft Cloud ID
of the personnel file shelf>/<document name with file extension>/<external key
of the category>/<external key of the personnel file folder>/<valid from: yyyy-
mm-dd>/<valid until: yyyy-mm-dd>/<document state:
PersonnelFileDocumentInProgress oder PersonnelFileDocumentClosed>
```

The document must be delivered in the HTTP body. The parameters “personnel number”, “document name with file extension” and the content of the document are mandatory. If no personnel file folder but a category is defined, it is tried to determine the personnel file folder via the category. If no unambiguous personnel file folder can be determined, an error is generated.

Example

```
https://at.cloud.fabasoft.com/folio/uploadpfdocument/00002/doc.txt//HRDOCUMENT_P
AYROLL//2017-01-30/
```

18.2 Web Service

A web service is provided to upload documents and to create or read personnel files.

The WSDL can be accessed using the following URL:

`https://<server>/<vdir>/fscdav/wsdl?WEBSVC=FSCPERSONNELFILE_1_1001_WebServicesPersonnelFile`

The web service supports also the JSON format:

`https://<host>/<vdir>/wsjson/FSCPERSONNELFILE_1_1001_WebServicesPersonnelFile/<operation>`

Operations:

- `GetPersonnelFile`
  Retrieves a list of personnel files based on a personal number. If no personnel files can be found a list of available personnel file shelves are returned.
- `CreatePersonnelFile`
  Is used to create a personnel file with the given property values.
- `UpdatePersonnelFile`
  Refreshes a personnel file. Single-valued properties are overwritten if they are specified. To remove a value from a single-valued property, the property must not be specified and be defined in `overwriteattributes`. Values of multi-valued properties are appended by default. If they are defined in `overwriteattributes` they are overwritten. You can use `implicitcreateonupdate` to specify whether a personnel file should be created, if no personnel file with the specified combination of `persnum` and `shelfid` exists.
  If it is defined in the personnel file configuration that unique personnel numbers should be used across all personnel file shelves, existing personnel files can be moved by specifying a different `shelfid`.
- `UploadDocument`
  Is used to upload documents to a personnel file.
- `UploadScannedDocument`
  Is used to upload scanned documents to the personnel file. To do so the personnel file shelf and the barcode have to be submitted as parameter. The document is automatically removed from the scan queue after a successful upload.

Note: The web service calls with the JSON format must be called using the HTTP request method “POST”.

Example

Request JSON (`GetPersonnelFile`):

```
{"shelfid":"COO.200.200.4.156","persnum":"00000008"}
{"shelfid":null,"persnum":"00000000"}
```

Request JSON (`CreatePersonnelFile`):

```
{
  "data": {
      "_": "PersonnelFileData",
```

```
      "shelfid": "COO.200.200.4.156",
      "persnum": "10000001",
      "firstname": "Martin",
      "surname": "Peterson",
      "socialsecid": "12345",
      "sex": "1",
      "supervisorid": "colin.steve@example.com",
      "allsupervisors": [
         {"supervisorid": "laura.hammond@example.com"},
         {"supervisorid": "davis.baker@example.com"}
      ]
   }
}
```

Request JSON (`UpdatePersonnelFile`):

```
{
  "data": {
      "_": "PersonnelFileData",
      "shelfid": "COO.200.200.4.156",
      "persnum": "10000001",
      "telephone": [      {
         "_": "Telephone",
         "telnumber": "+43 664 12345"
      }],
      "supervisorid": "laura.hammond@example.com",
      "allsupervisors": [
         {"supervisorid": "laura.hammond@example.com"},
         {"supervisorid": "davis.baker@example.com"}
      ],
      "overwriteattributes": [
         "telephone",
         "supervisorid",
         "allsupervisors"
      ]
   }
}
```

Request JSON (`UploadDocument`):

```
{
  "persnum" : "00001",
  "shelfid" : "COO.1.506.4.3628",
  "docname" : "Payroll_2017_12.txt",
  "doctype" : "HRDOCUMENT_PAYROLL",
  "register" : "HRREGISTER_PAYROLL",
  "validfrom" : "2017-01-02",
  "validuntil" : "2017-12-15",
  "docstate" : "PersonnelFileDocumentClosed",
  "doccontent" : "RG9rdW1lbnRpbmhhbHQ",
  "params" : {
    "objsubject" : "Payroll",
    "COOSYSTEM@1.1:objexternalkey" : "extid",
    "FSCTERM@1.1001:objterms" : ["COO.1.506.4.19119", "COO.1.506.4.19120"]
  }
}
```

More information about the parameters of the operations can be found here: https://help.developer.fabasoft.com/index.php. Search for the corresponding actions (`WSGetPersonnelFile`, `WSCreatePersonnelFile`, `WSUpdatePersonnelFile`, `WSUploadDocument`, `UploadScannedDocument`).