FAQ: Add/remove persons to/from a group

Select the item Groups in the menu tree under Administration.

This menu item provides a **list of all created groups** (loose groups and hierarchical groups) of the client (company).

Grou	ips							
🙆 Ne	w group						🔒 Print 🗋	PDF 🔀 Excel
						Entry 11-20 of 50 《 🔇	2 v > »	Lines: 10 V
	Shortname 🝦	Name 🛊	Description 👙	Auto-add new persons? 🖨	Client \$	Orgstructure 🖨	Valid from	Valid till 🌲
Q	0	(((((((((((((((((((۹ م	· · ·	All	All 🗸	٩	Q.
	SuW-Coop	Co-operativ buildings		No	Sonne und Wind GmbH	Organigramm SuW	Jun 19, 2023	Jan 1, 3000
	SuW-EE	Energy Experts	a de la companya de la	No	Sonne und Wind GmbH	Lose Gruppen SuW	Jun 20, 2023	Jan 1, 3000
	SuW-Eink	Einkauf		No	Sonne und Wind GmbH	Organigramm SuW	Mar 3, 2022	Jan 1, 3000
	SuW-Fair	Trade fair organisation	c .	No	Sonne und Wind GmbH	Organigramm SuW	Oct 18, 2023	Jan 1, 3000
	SuW-Fem	Frauen		No	Sonne und Wind GmbH	Lose Gruppen SuW	Jan 25, 2023	Jan 1, 3000
	SuW-FF	Finanzierung und Förderungen	Finanzierungs- und Förderungsabwicklung	No	Sonne und Wind GmbH	Organigramm SuW	Jan 2, 2023	Jan 1, 3000
	SuW-Firm	SuW-Firmensitz		No	Sonne und Wind GmbH	Standorte SuW	Jul 17, 2022	Jan 1, 3000
	SuW-FuE	Forschung und Entwicklung	c .	No	Sonne und Wind GmbH	Organigramm SuW	May 12, 2022	Jan 1, 3000
	SuW-GuI	Gewerbe und Industrie	Kunden aus Gewerbe und Industrie	No	Sonne und Wind GmbH	Organigramm SuW	Jan 2, 2023	Jan 1, 3000
	SuW-HRX	HRX User	c	No	Sonne und Wind GmbH	Lose Gruppen SuW	Mar 3, 2022	Jan 1, 3000
						Entry 11-	-20 of 50 《 < 2	2 ~ > >>

Using the input fields under Short name, Name, Description, Client, Organisational structure, Valid from and Valid to, the list can be restricted accordingly.

For example, by entering "M" in the Short name field, the list can be restricted to groups whose short name contains at least one "M".

Groups

A New group

	Shortname 🔷	Name 븆	Description 🔶
Q	۵	M	
	SuW-Admin	Ad <mark>m</mark> in	
	SuW-ALLE	Alle Mitarbeiter	
	SuW-AUS	Sonne und Wind Ex- <mark>M</mark> itarbeiter	
	SuW-Firm	SuW-Fir <mark>m</mark> ensitz	
	SuW-LiveChat	User <mark>m</mark> it Livechat Support	
	SuW-Manager	Manager	
	SuW-Mark	Marketing	
	SuW-MontSol	Montage Solar	
	SuW-MontWind	Montage Windkraft	
	SuW-PMSol	Agiles Projekt <mark>m</mark> anage <mark>m</mark> ent Solar	

To edit the desired group, simply click in the line or on the

edit 🕼 symbol.

Add a person

After selecting a group, you can add staff members to the selected group by clicking on the **Persons tab**.

ΝΟΤΙΖ

ATTENTION: Please note that an employee can only be a member of ONE hierarchical group (group from the organigram) at any one time, but can be a member of any number of Loose groups at the same time. The following screenshot shows whether you are currently editing an organigram group or a Loose group (marked in red).

By clicking on New Person Assignment, members can be added to this group.

Group						
🖺 Save 🖬 Save & Close 🗲 Ba	ck 📋 Delete 🛛 🗗 Edit in	HR-Expert			🖨 Print	
Client	Sonne und Wind GmbH	v	Orgstructure	Organigramm SuW	v	
Shortname	SuW-Mark		Group type	Organisationeinheit		
Name	Marketing		Valid from	29.03.2022		
Description			Valid till	01.01.3000		
Top Level Group			Automatically add new persons to this group			
Parent Group Child groups Roles Per	sons Action Permissions In cor with	History			er ^a	
Name Valid from	Valid till User	e Delete / Edit				
Lindner Iris	3 🛱 01.01.3000 🛱					
Micosi Michael 02.11.2022	2 🛱 01.01.3000 🛱 🖉					

After clicking, the following table appears:

Parent Group Child groups Roles Persons Action Permissions In competence of roleholders Settings			~
with History			
New Person Assignment	Valid from	Volid Hill	•
Choose persons			

After selecting the person (Charon Claudia in this case; the selection can be made either by simply typing in the field or by clicking on the button with the 3 dots), you can click on Save. The fields **Valid from** and **Valid to** are either filled with the default values (Valid from: Today; Valid to 1.1.3000) or - as in this case - there is the option to enter a concrete date to specify that Mrs Charon should be a member of this group from 01.12.2023 onwards.

NOTIZ Note: The previous assignment of an employee to a group in the organisation chart is automatically deleted when the new assignment becomes valid.

nt Group Child groups Roles Persons Action Permissions In competence of roleholders Settings		
with History		
New Person Assignment		
New person	Valid from Valid till	
Charon Claudia (SuW-PLinz) x	01.12.2023	

saving, the staff member appears in the list of group members.

1	Parent Group	Child groups	Roles Persons	Action Permissions	In compe	etence of roleholders	Settings			
					with His	tory 🗌				
	+ New Person Assignment									
								Entries 1 - 3 of 3 ≪ < 1 👻 > » Lines: 5 💌		
	Name		Valid from	Valid till	Active user	Delete / Edit				
	Charon Cl	audia	01.12.2023	01.01.3000						
	Lrdner Iris	5	14.09.2023	01.01.3000						
	🔺 Micosi Mic	hael	02.11.2022	01.01.3000				P		

Remove a person from a group

Membership of an organisational chart group can only be changed by moving to another organisational chart group, as each employee can be a member of one, and only one, organisational chart group at any one time.

Therefore, if you want to end membership of an organigram group, this is done by adding it to another organigram group.

Membership of a loose group can be terminated by entering the "Valid to" date.

The membership expiry date can be edited by clicking on the edit icon

1

Additional information

You can find more information on the topic of groups under the following link: Groups¹

1. /daisy/personalwolke-default-en/Time-Base/10473-dsy/Groups.html