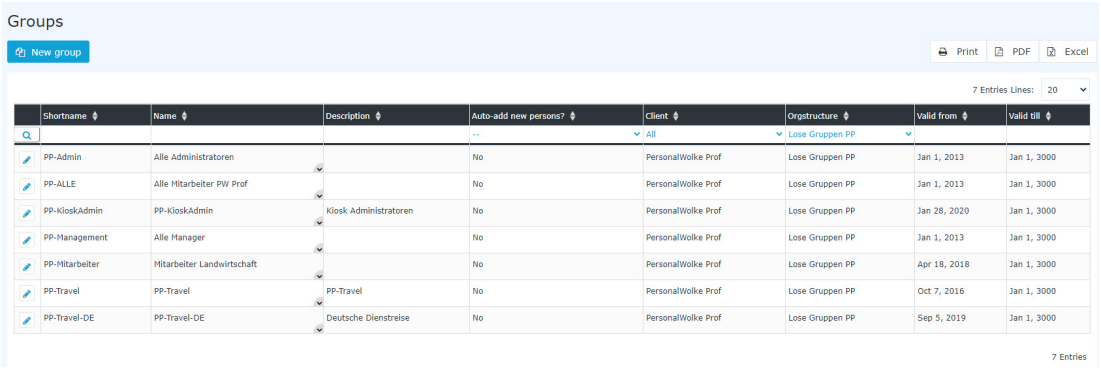
Groups - Overview

[Note: the screenshots still contain the names "Organigram group" and "Loose groups" that were in use for organizational units and permission groups before July 2024.]

General

Under the menu item **Groups** you will find an overview of all groups (departments) created for your client (company).
If your organizational structure also includes **locations** and/or **cost centers**, these can also be found in this area by selecting the corresponding terms under "Organizational structure".

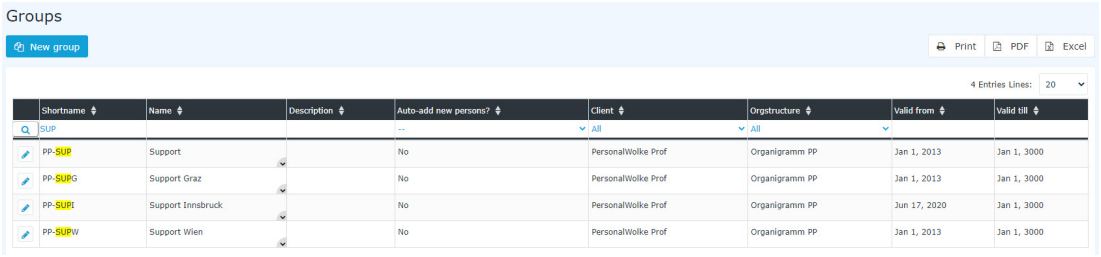


Name	Description
Short name	the short name of the group including the prefix (must be unique!)
Name	the (long) name of the group
Description	optional description of the group
Automatically add new persons?	show all groups or select (Yes/No)
Client	the company for which the administration is performed here.
Organizational structure	Available options are "All", "Organizational units" and "Permission groups", or "Location" and/or "Cost center"
Valid from/Valid to	Start date and possible expiration date of the group (if not defined, automatically 01/01/3000)

Sorting / search options

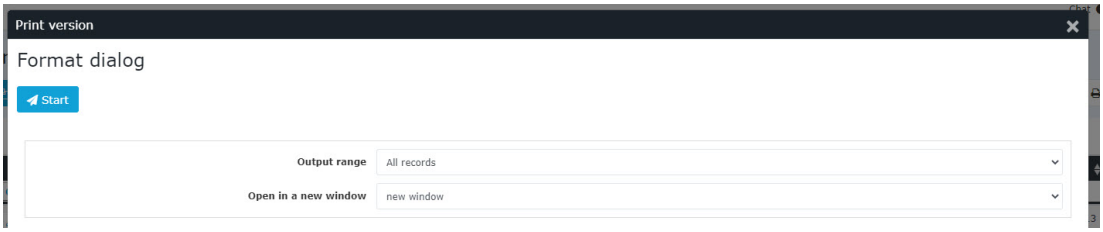
This list can be sorted using the small white triangles next to the column headings.

In addition, the white text fields at the beginning of the list let you restrict the displayed records by various criteria, e.g., entering "Linz" under Name shows only groups whose name contains "Linz" (in the example, a group from the organizational chart, a location and a cost center).
To do this, enter the search term in the text field and start the search with Enter / the Return key or by clicking the magnifying glass icon. To make all records visible again, simply delete the search term from the corresponding field and press Enter again or click the magnifying glass icon.



Practical functions

Clicking one of the 3 icons in the upper right area (Print, PDF, Excel) opens the following dialog box, where you can specify in more detail the data to be displayed in the selected medium (Print, PDF, Excel):



Output range

- ***All records***
  All groups of the company are displayed in the selected output medium.
- ***Current selection***
  Only the currently displayed groups of the company are displayed in the selected output medium

Open in new window

- ***New window***
  The selected records are displayed in a new window
- ***Current window***
  The selected records are displayed in the current window

This function is also handy if you want to export a list of groups, possibly filtered by various criteria. The Excel format is a good fit for this.