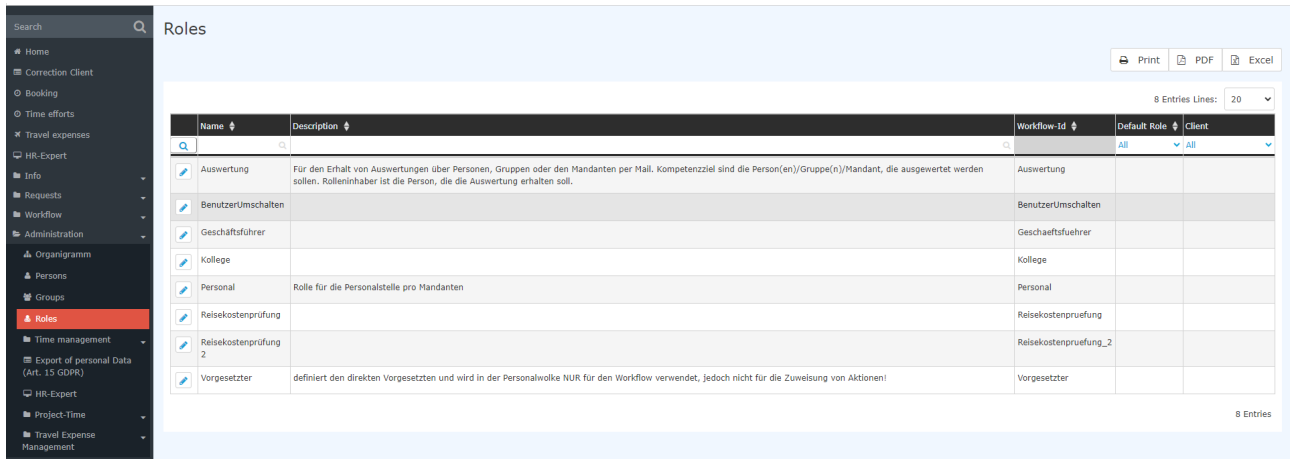


Dealing with role holders (assigning, editing, deleting)

General

To add a role (supervisor, HR) to a person or a group, please select **Roles** in the menu tree under **Administration**.

This takes you to an overview of the available roles.

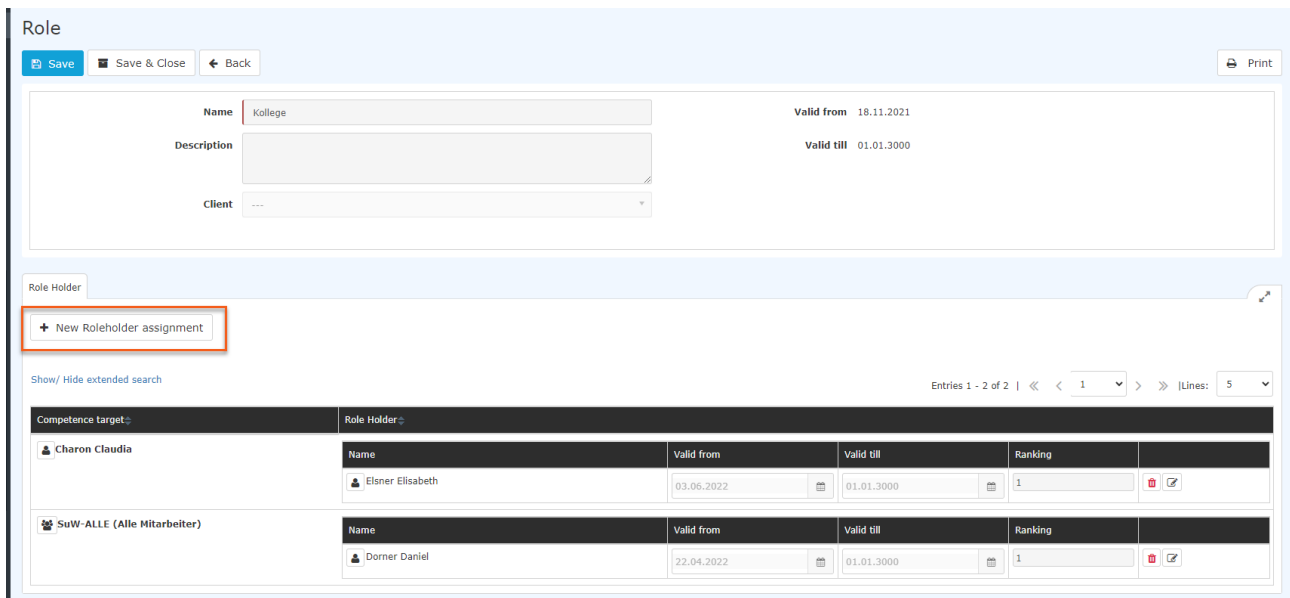


Name	Description	Workflow-id	Default Role	Client
Auswertung	Für den Erhalt von Auswertungen über Personen, Gruppen oder den Mandanten per Mail. Kompetenzziel sind die Person(en)/Gruppe(n)/Mandant, die ausgewertet werden sollen. Rolleninhaber ist die Person, die die Auswertung erhalten soll.	Auswertung	All	All
Benutzerumschalten		Benutzerumschalten		
Geschäftsführer		Geschäftsführer		
Kollege		Kollege		
Personal	Rolle für die Personalstelle pro Mandanten	Personal		
Reisekostenprüfung		Reisekostenprüfung		
Reisekostenprüfung 2		Reisekostenprüfung_2		
Vorgesetzter	definiert den direkten Vorgesetzten und wird in der Personalrolle NUR für den Workflow verwendet, jedoch nicht für die Zuweisung von Aktionen!	Vorgesetzter		

Select the desired role by clicking it. In the following view, you can now add new role holders (persons, groups) by clicking **New role holder** or **delete / edit existing role holders**.

- [Adding a role holder¹](#)
- [Deleting / editing a role holder²](#)

Adding a role holder



Role

Save Save & Close Back Print

Name: Kollege Valid from: 18.11.2021

Description: Valid till: 01.01.3000

Client: ---

Role Holder

+ New Roleholder assignment

Show/ Hide extended search Entries 1 - 2 of 2 | << 1 >> | Lines: 5

Competence target	Role Holder								
Charon Claudia	<table border="1"><thead><tr><th>Name</th><th>Valid from</th><th>Valid till</th><th>Ranking</th></tr></thead><tbody><tr><td>Elsner Elisabeth</td><td>03.06.2022</td><td>01.01.3000</td><td>1</td></tr></tbody></table>	Name	Valid from	Valid till	Ranking	Elsner Elisabeth	03.06.2022	01.01.3000	1
	Name	Valid from	Valid till	Ranking					
Elsner Elisabeth	03.06.2022	01.01.3000	1						
SuW-ALLE (Alle Mitarbeiter)	<table border="1"><thead><tr><th>Name</th><th>Valid from</th><th>Valid till</th><th>Ranking</th></tr></thead><tbody><tr><td>Dörner Daniel</td><td>22.04.2022</td><td>01.01.3000</td><td>1</td></tr></tbody></table>	Name	Valid from	Valid till	Ranking	Dörner Daniel	22.04.2022	01.01.3000	1
	Name	Valid from	Valid till	Ranking					
Dörner Daniel	22.04.2022	01.01.3000	1						

The following input screen opens.

The parameters are explained as follows:

Step 1: Select the competence target

- **Person** - means that the selected role holder (step 2) exercises the selected role (supervisor) for the selected person.
- **Group** - means that the selected role holder (step 2) exercises the selected role (supervisor) for the selected group.
- **Client** - means that the selected role holder (step 2) exercises the selected role (supervisor) for the entire client (the entire company).

Step 2: Select the role holder

- **Person** - means that the selected person exercises the role (supervisor) for the selected competence target (person, group or client).
- **Group** - means that the selected group (and thus ALL persons belonging to this group) exercises the selected role (supervisor) for the selected competence target (person, group, client).

Step 3: Set optional parameters

- **Valid from** - defines FROM which point in time the selected role assignment is valid.
- **Valid until** - defines UNTIL which point in time the selected role assignment is valid.
- **Ranking** - defines whether the selected role holder exercises the role as the person with primary responsibility (=1), as deputy (=2), as deputy of the deputy (=3), and so on. The same ranking can be assigned to several persons!

If the parameters in step 3 are not specified, they are set to the default values:

- Valid from - current date
- Valid until - unlimited (01.01.3000)
- Ranking - 1 (primary responsibility)

Clicking **Save** applies the selected settings.

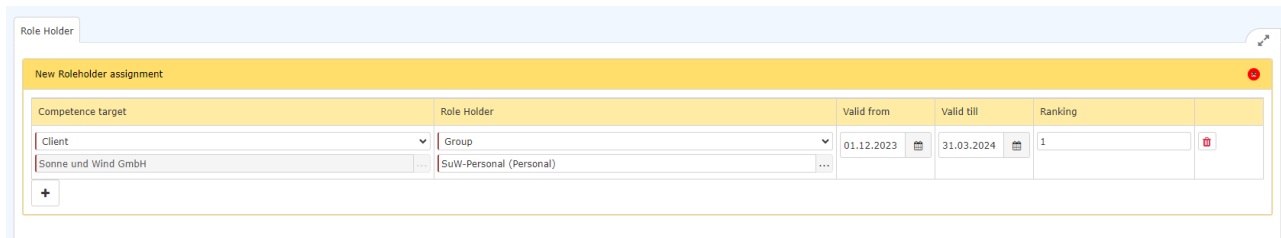
Example 1

A person is to be added as supervisor for a group. The assignment is to be valid from now on with no end date, and the person is to exercise this role with primary responsibility (=1).

- Competence target: Group, select the group
- Role holder: Person, select the person

and save.

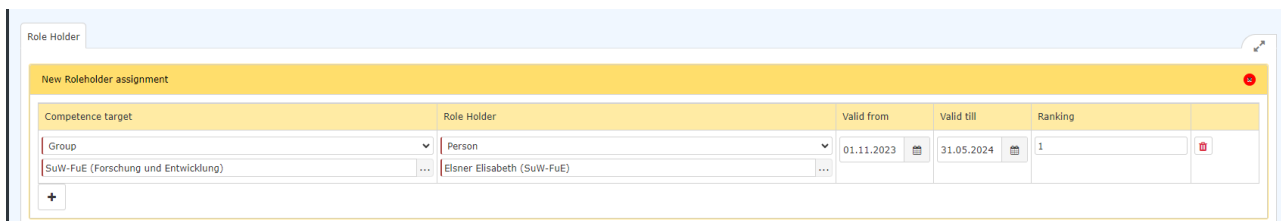
Example 2



Competence target	Role Holder	Valid from	Valid till	Ranking
Client	Group	01.12.2023	31.03.2024	1
Sonne und Wind GmbH	SuW-Personal (Personal)			

In this example, the group SuW-Personal (role holder) is assigned a role for the **entire client** (the company Sonne und Wind GmbH, SuW). This assignment makes the most sense for the HR role, because in this way, for example, the HR department group can be assigned the HR role.

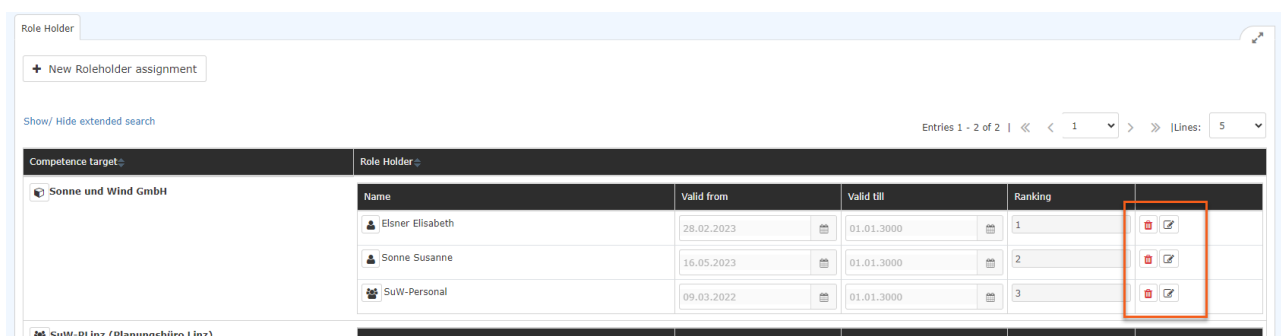
Example 3



Competence target	Role Holder	Valid from	Valid till	Ranking
Group	Person	01.11.2023	31.05.2024	1
SuW-FuE (Forschung und Entwicklung)	Elsner Elisabeth (SuW-FuE)			

In this example, the person Elisabeth Elsner (role holder) is assigned to the group SuW-FuW as supervisor in the period from 01.11.2023 to 31.05.2024 with first ranking.

Deleting / editing a role holder



Competence target	Role Holder	Valid from	Valid till	Ranking
Sonne und Wind GmbH	Elsner Elisabeth	28.02.2023	01.01.3000	1
	Sonne Susanne	16.05.2023	01.01.3000	2
	SuW-Personal	09.03.2022	01.01.3000	3

After selecting the role, the role assignment can be edited



/ deleted



in the role holder overview. The competence target describes which person, group or client the role holder is responsible for. In addition, information on the selected validity period and the ranking can be seen here.

Additional information

Example 3 probably represents the most common use case (a person is to be assigned to a group as a role holder). It is also important to know that the **assignment of a person is stronger than the assignment of a group, which in turn is stronger than the assignment of a client**.

An overview of the holders of **roles with responsibility** (supervisor, HR, travel expense review) is also provided by the employee list (Administration/Persons): here, the employees to whom this applies are specially marked by a colored button, see the following image.

Persons

+ New person

Print PDF Excel

Entry 1-20 of 22 << 1 2 >> Lines: 20

Lastname	First name	Name	Client	Group	Username	Employee-ID	Email	TA-ID	Time zone	Active user	Valid from
			All							Yes	
Adam	Angelika	Angelika Adam	Sonne und Wind GmbH	SuW-CEO	SuWadamange	SuW22032801	angelika.adam@sonneundwind.at	5358		Yes	Mar 28, 2022
Berger	Barbara	Barbara Berger	Sonne und Wind GmbH	SuW-Eink	SuWbarberg	SuW22032802	barbara.berger@sonneundwind.at	5359		Yes	Mar 28, 2022
Charon	Claudia	Claudia Charon	Sonne und Wind GmbH	SuW-PLinz	SuWcharclau	SuW22032803	claudia.charon@sonneundwind.at	5406		Yes	Apr 5, 2022
Dorner	Daniel	Daniel Dorner	Sonne und Wind GmbH	SuW-ProdWind	SuWdanidorn	SuW22032804	daniel.dorner@sonneundwind.at	5460		Yes	Apr 22, 2022
Elsner	Elisabeth	Elisabeth Elsner	Sonne und Wind GmbH	SuW-FuE	SuWelsnells	SuW22032806	elisabeth.elsner@sonneundwind.at	5619		Yes	Jun 3, 2022
Ezquerria	Ernesto	Ernesto Ezquerria	Sonne und Wind GmbH	SuW-PMWind	SuWwezquerne	SuW22032820		6367		Yes	Jan 4, 2023
Foscanu	Fabiu	Fabiu Foscanu	Sonne und Wind GmbH	SuW-PMWind	SuWfoscfabi	SuW22032812	fabiu.foscanu@sonneundwind.at	62		Yes	Jul 15, 2022
Huber	Heinrich	Heinrich Huber	Sonne und Wind GmbH	SuW-Const	SuWhubeheln	SuW22032811	heinrich.huber@sonneundwind.at	6967		Yes	Jun 10, 2022

You can find more information on roles under [Roles](#)³.

1. </daisy/personalwolke-admin/5886-dsy.html?language=4>