How To: Group management

As an administrator, you access the **group management** via the menu tree under:

MASTER DATA
--> Groups

In the **data table** you will find an **overview of all groups.** They can be filtered by several criteria such as client, name, short name, etc., or you can **search** specifically for groups.

In addition to **creating a new group** and **editing/deleting an existing group**, there are further options in the group management, which are displayed as **sub-tabs**:

Parent group/ Subgroup[1]	**Roles**[2]	**Persons**[3]	**Action permissions**[4]	**In the competence area of these role holders**[5]	**Modules**
How do I organize parent/ subordinate groups in the hierarchy?	How can I assign roles to a group?	How can I add/ remove persons to/from a group?	How can I grant permissions for actions to groups?	In which role competence areas is this group located?	Quick settings for the Workflow module

Creating a new group

Clicking the "New group" button adds a new group. The following fields should be filled in:

1) Client	Selection of the client to which the group is to belong
2) Organizational structure	Selection of the organizational structure to which the group is assigned. This structure also determines the **form of organization** (hierarchical/non-hierarchical) and the possibility of **singular group membership.**
3) Short name	Short name of the group; must be **unique** throughout the system
4) Name	Name of the group
5) Description	A short description of the purpose or content of the group
6) Valid from	Here you can enter the date from which the **group is active**; default setting = today's date

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All fields marked with a **red bar** must be **filled in**!

Finally, click **"Save & Close"** to return to the overview of all groups, or **"Save"** if you want to continue editing the form.

The action can be interrupted at any time with the **"Back"** button.

Editing an existing group

Clicking

the 

icon in the group overview lets you **edit** the name, short name and description of the selected group. For **hierarchically organized** groups there is also the **"Highest level" checkbox**:

Here you can define whether the group is displayed as the highest group in the organizational chart. It is also possible to activate "highest level" for several groups. Groups on the highest level are equal to each other and have no parent groups.

Deleting a group

A group can only be **deleted** if it has **neither subgroups nor active members**. You can check this by selecting the corresponding group from the overview and then clicking the **"Subgroups"** tab.
If subgroups exist, the group cannot (yet) be deleted and the delete button is not displayed. To delete groups, the best procedure is as follows:

1. Remove/move all persons from the subgroups
2. Delete the subgroups
3. Remove/move any persons from the parent group
4. It is then possible to delete the group completely --> click the delete button
5. Clicking "Save" deletes the group - it no longer appears in the group overview

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If the group to be deleted is a group within the **hierarchical organizational structure**, the **group members** must be **moved to another group** within the organizational structure before deletion! (every person must be a group member in a hierarchical organizational structure at all times)

Assigning a parent group

Here you can define existing groups as **parent groups** of the current group. The selected group is then positioned in the hierarchy **above the group currently being edited**. The **validity period** (from when until when does this relationship apply?) can also be defined. This tab only exists for hierarchically organized groups.

Assigning a subordinate group

As with the "parent groups", **subordinate groups** and their **validity period** can be defined for the current group here. These groups are then positioned in the hierarchy **below the group currently being edited**. This option also only exists for hierarchically organized groups.

Assigning a role to a group

Under this item, certain **role functions can be assigned** to the group (e.g. role "HR manager").
Roles offer the possibility to allow or restrict **access** to certain **areas and functions**. The areas that the role holders can view with their enabled functions are controlled by the **"Competence target"** option (e.g. view of the entire client, a specific person, a specific group). Clicking **"New role holder"** lets you assign a role to the group. The following fields are filled in:

1) Role	Selection of the **role** to be assigned to the group
2) Competence target	Selection of the **person (group)** that is to be **viewable** within the role functions (whose data may I view/change?). Choose between All, Client, Group or Person.
2) Valid from	Date from which the group holds the role

3) Valid to	Date until which the group holds the role ("expiry date" of the role permissions), for **temporary approvals**
4) # (numbering)	Here you can assign a **ranking number** according to which the role holders are addressed in a workflow. When assigning a role to a group, this function is **of little importance** - so this field can be left empty.

Clicking **"Save"** or **"Save and Close"** confirms the new role assignment.
The **table** below gives an **overview** of all roles assigned to this group. If the **"with history"** checkbox is activated, **former role assignments** are also visible in the overview. Clicking the



icon lets you change the **expiry date** of the role permission; clicking the **"Delete" icon** deletes the role assignment for the group - then you must save.

Assigning persons to a group

Clicking the **"New person assignment"** button lets you select **individual persons** who are to belong to the group:

1) New person	Selection of the **person** from the data list who is to belong to the group
2) Valid from	Date from which the person is to be a member of the group
3) Valid to	Date until which the person is to be a member of the group (expiry date)

Clicking **"Save"** or **"Save and Close"** confirms the new group member.

The **table below** shows an **overview** of all current group members. If the **"with history"** checkbox is activated, **former group members** are also visible in the overview.

If the group is **not** a group of a hierarchical organizational structure (where every person must be a member of exactly one group), the person can be **removed** from the group by clicking the **"Delete" icon** - then you must save. A **group change** is best carried out via the menu in the **"Persons"** section.

In the competence area of these role holders

The "In the competence area of these role holders" tab provides an **overview of whose competence areas** the group is in, i.e. who the responsible superior is, who has personnel responsibility, etc. If the group is in the competence area of several role holders of the same role, the **ranking** indicates which holder per role is the first "contact person".

Using the search fields in the **"advanced search"**, you can **search** specifically for certain roles and/or role holders.

Felder

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