How do I create a group?

This chapter covers the following topics:

- Prerequisites for creating a group [1]
- Creating a new organizational unit[2]
- Creating a permission group[3]

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

Prerequisites

Before you create a new department / group / organizational unit, you should answer the following questions for yourself:

- Which **organizational structure** should the group be integrated into?
  - **Organizational unit:** hierarchical group (relationship of the groups to one another (higher-level / lower-level groups); an employee can only be a member of one hierarchical group at a time)
  - **Permission group:** no hierarchies between the groups. An employee can be a member of any number of permission groups at the same time
- **Organizational unit**: Which group should be higher-level than the newly created group? Which lower-level?
- **Permission group**: Does the group (and thereby all its members) have a **special function (role)** in the company (HR, supervisor)?
  - **Yes**: **Which one?** HR or supervisor or both?

Once you have answered these questions, you have gathered the minimum information required to create a new group.

Examples of hierarchical groups: a new Purchasing (PU) department is to report to the Management (MG) department; the new Purchasing (PU) department is to be the higher-level department of the groups Purchasing East (PUE) and Purchasing West (PUW), etc. --> set up a hierarchical group[4]

Examples of permission groups: all female employees; all male employees; all apprentices; all department representatives, an HR department; etc. --> set up a permission group[5]

> NOTIZ
> Note: If your organizational structure includes **locations** or **cost centers**, they are created in the same way as permission groups!

Creating a new organizational unit

In the menu tree under **Administration**, click the menu item **Groups**.

The following list shows an **overview of all organizational units and permission groups** in the company. Click **New group**.

In the following input screen, the fields must be filled in as follows:

- **Client**: <Your company>
- **Organizational structure** (available only after selecting the client): **Organizational unit**
- **Short name** (pre-filled with the prefix = client abbreviation): e.g.: SuW-PBVienna
- **Name** (long name of the group): e.g.: Planning office Vienna

- **Description** (optional): e.g.: Plant planning, Vienna location
- **Valid from/Valid until**: can be limited, pre-filled automatically with the current date and 01.01.3000 respectively
- **Add new person automatically**: checkbox for automations

Clicking Save creates the group, and additional tabs appear:

The 3 (4) tabs marked in red are relevant for daily use: Parent group, (Subgroup), Roles, Persons.

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> Caution: The checkbox for **Top level** *[ONLY for hierarchical groups]* must be checked for exactly **one** group. This group then represents the top group (root) in the organigram. All other groups are subordinate to it.

Parent group

Because a new group has been created in the organigram, it must of course be inserted into the existing hierarchy. To do so, click the button **New parent group** in the **Parent group** tab.

Use the dropdown list to select the group that should be located above the group you just created in the organigram. With **Valid from** and **Valid until**, you can optionally set the validity period of this assignment. If nothing is filled in, the assignment applies immediately and until further notice (01.01.3000). This feature is useful, for example, when a change in the organigram is coming up - you can plan it here early on (e.g.: valid from 01.09.), and it is then activated automatically on the specified date.

Clicking **Save** applies the assignment.

Subgroups

Here you can define the groups that should be located below the current group in the company hierarchy. Note that the groups added in this tab **are automatically assigned the current group as their parent group**. Normally this tab is empty, and only a parent group is created under **Parent group**, which automatically determines which groups are further down in the hierarchy.

Roles

By clicking Role assignment, a role can be assigned to the group (supervisor, HR). If, for example, the HR role is assigned, all members of this group automatically receive the HR role and are thereby responsible for HR matters for the company.

Click the 3 horizontal dots to select the desired role (e.g. HR). Under **Competence target**, you can select a **person** or a **group** for whom the current group is to exercise the selected role.

An example: If you select HR as the role and Person as the competence target, the current group is responsible for HR matters for the selected person XYZ. That means all members of this group are responsible for HR matters concerning person XYZ.

With **Valid from** and **Valid until**, a validity period can be set for the role assignment. Clicking **Save** saves the settings
Roles can be edited or deleted by clicking the corresponding icons.

Persons

You can find out how to assign persons to a group at the following link: Adding employees to a group[6]

Setting up a new permission group

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Note: new **cost centers** or **locations** are created in the same way as permission groups.

In the menu tree under **Administration**, click the menu item **Groups**.

The following list shows an **overview of all organizational units and permission groups** in the company. Click **New group**.

In the input screen, the fields must be filled in as follows:

- **Client**: <Your company>
- **Organizational structure** (available only after selecting the client): **Organigram**
- **Short name** (pre-filled with the prefix = client abbreviation): e.g.: SuW-PBVienna
- **Name** (long name of the group): e.g.: Planning office Vienna
- **Description** (optional): e.g.: Plant planning, Vienna location
- **Valid from/Valid until**: can be limited, pre-filled automatically with the current date and 01.01.3000 respectively
- **Add new person automatically**: checkbox for automations

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It makes sense to **enable the checkbox "Add new person automatically"** for the group **XXX-ALL (for all employees)**, because **every new employee MUST be a member of the group XXX-ALL** in order to be able to use the system at all.

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If you also use other Personalwolke modules such as Project Time or Travel, it also makes sense to enable automatic adding to the respective base user group.

Clicking Save creates the group, and additional tabs appear:

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Parent and subordinate groups do not exist for permission groups, since they are not embedded in an organigram.

[Note: the screenshot still contains the name "Loose groups" that was used for permission groups before July 2024.]

The two tabs **Roles** and **Persons** are the main ones relevant for daily use here.

Roles

By clicking **New role holder**, a role can be assigned to the group as a whole (supervisor, HR). If, for example, the HR role is assigned, all members of this group automatically receive the HR role and are thereby responsible for HR matters for the company. This also applies automatically to every employee newly assigned to this group.

Persons

You can find out how to assign persons to a group at the following link: Adding employees to a group[7]

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Note: If the structure of your organization also includes **cost centers** and **locations**, they can be created in the same way, by making the appropriate selection in the dropdown list in the field "Organizational structure".

1. /daisy/personalwolke-admin/6453-dsy.html?language=4
2. /daisy/personalwolke-admin/6453-dsy.html?language=4