Create a new group (organizational unit, permission group)

In this chapter you will find 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 in use 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:

- Into which **organizational structure** should the group be incorporated?
  - **Organizational unit:** hierarchical group (relationship of the groups to each other (superior / subordinate 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 superior to the newly created group? Which should be subordinate?
- **Permission groups**: Does the group (and thus all its members) have a **special function (role)** in the company (personnel, supervisor)?
  - **Yes**: **Which one?** Personnel or supervisor or both?

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

Examples of hierarchical groups: a new Purchasing department (PD) is to report to the Management department (CEO); the new Purchasing department (PD) is to be the superior department of the groups Purchasing East (PDE) and Purchasing West (PDW), 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 hierarchical group

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

In the following list you will see an **overview of all organizational units and permission groups** in the company. Click **New group**.

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

- **Client**: <your company>
- **Organizational structure** (only available after selecting the client): **Organizational unit**
- **Short name** (preset with the prefix = client abbreviation): e.g., SuW-PBWien
- **Name** (long name of the group): e.g., Planning Office Vienna

- **Description** (optional): e.g., Plant planning, Vienna location
- **Valid from/Valid to**: can be limited, preset automatically with today's date and 01/01/3000
- **Add new person automatically**: checkbox for automation

Clicking Save creates the group, and additional tabs appear:

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

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Attention: The checkmark for **Highest level** *[ONLY for hierarchical groups]* must be set for exactly **one single** group. This group then represents the top group (root) in the organizational chart. All other groups are subordinate to it

Parent group

Since a new group was created in the organizational chart, it must of course be inserted into the existing hierarchy. To do this, please click the **New parent group** button in the **Parent group** tab

The dropdown list lets you select the group that is to sit above the group you just created in the organizational chart. With **Valid from** and **Valid to**, you can optionally define the validity period of this assignment. If nothing is filled in, the assignment is valid immediately and until further notice (01/01/3000). This feature is useful if, for example, a change in the organizational chart is coming up - it can be planned here early (e.g., valid from 09/01) and is then activated automatically on the specified date.

Clicking **Save** applies the assignment.

Subgroups

Here you can define the groups that are to be placed 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

Clicking Role assignment lets you assign a role to the group (supervisor, personnel). If, for example, the role Personnel is assigned, all members of this group are automatically assigned the role Personnel and are thus responsible for HR matters for the company.

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

An example: If you select Personnel 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 to**, 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: Add employees to a group[6]

Setting up a new permission group

NOTIZ

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**.

In the following list you will see 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** (only available after selecting the client): **Permission groups**
- **Short name** (preset with the prefix = client abbreviation): e.g., SuW-PBWien
- **Name** (long name of the group): e.g., Planning Office Vienna
- **Description** (optional): e.g., Plant planning, Vienna location
- **Valid from/Valid to**: can be limited, preset automatically with today's date and 01/01/3000
- **Add new person automatically**: checkbox for automation

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It makes sense to **activate the "Add new person automatically" checkbox** for the group **XXX-ALLE (for all employees)**, because **every new employee MUST be a member of the group XXX-ALLE** 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 here to activate automatic addition 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 organizational chart.

For daily use, the two tabs **Roles** and **Persons** are the most relevant here.

Roles

Clicking **New role holder** lets you assign a role to the group as a whole (supervisor, personnel). If, for example, the role Personnel is assigned, all members of this group are automatically assigned the role Personnel and are thus 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: Add employees to a group[7]

NOTIZ

Note: If your organization's structure also includes **cost centers** and **locations**, they can be created in the same way by selecting them accordingly from the dropdown list in the "Organizational structure" field.

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

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