Neue Gruppe (Abteilung, Lose Gruppe) anlegen

In this chapter you will find the following points:

- Requirements for creating a group
- Creating a new hierarchical group (organisational unit)
- Create a loose group

Requirements

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

- Into which **organisational structure** should the group be incorporated?
  - **Organigram:** hierarchical group (relationship of groups to each other (superior / subordinate groups); an employee can only be a member of one hierarchical group at a time).
  - **Loose Group:** no hierarchies between groups. Employees can be members of any number of loose groups at the same time
- **Organigram**: Which group should be superordinate to the newly created group? Which subordinate?
- **Lose Gruppen**: Does the group (and thus all its members) have a specific function (**role**) in the company (staff, supervisor)?
  - **Yes: Which?** Staff or supervisor or both?

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

Examples of hierarchical groups: a new Purchasing department (PD) is to be subordinate to the Management (CEO) department; the new Purchasing department is to be the superior department of the Purchasing East (PDE) and Purchasing West (PDW) groups, etc. --> *set up a hierarchical group [Link will be added soon]*

Examples of Loose groups: all female employees; all male employees; all apprentices; all departmental confidants, one human resources department; etc. --> *set up a Loose group [Link will be added soon]*

Nach der Beantwortung dieser Fragen haben Sie die Mindestinformationen, die für die Anlage einer neuen Gruppe erforderlich sind, zusammen.

Beispiele für hierarchische Gruppen: eine neue Abteilung Einkauf (EK) soll der Abteilung Geschäftsführung (GF) unterstellt werden; die neue Abteilung Einkauf (EK) soll die übergeordnete Abteilung der Gruppen Einkauf Ost (EKO) und Einkauf West (EKW) sein etc. --> eine hierarchische Gruppe einrichten[1]

Beispiele für Lose Gruppen: alle weiblichen Mitarbeiter; alle männlichen Mitarbeiter; alle Lehrlinge; alle Abteilungsvertrauenspersonen, eine Personalabteilung; etc. --> eine Lose Gruppe einrichten[2]

> NOTIZ
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> If your organisational structure includes **locations** or c**ost centres**, they are created in the same way as Loose groups!

Create a new hierarchical group

Click on the menu item "**Groups**" in the menu tree under **"Administration**".

In the following list you will see an **overview of all Loose / hierarchical (organigram) groups** in the company. Click on **"New Group".**

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

- **Client**: <your company>
- **Organisational structure** (only available after selecting the client): Organisational chart
- **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 Location Vienna
- **Valid from/until**: Limitation possible, automatically preset with the current date or with 01.01.3000.
- **Add new person automatically**: Checkbox for automations

Clicking on **Save** creates the group and additional tabs appear:

Relevant for daily use are the 3(4) tabs marked in red: Parent Group, (Childgroup), Roles, Persons.

Für den täglichen Gebrauch relevant sind die 3(4) rot markierten Reiter: Übergeordnete Gruppe, (Untergruppe), Rollen, Personen.

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

Parent Group

Since a new group has been created in the organigram, it must of course be inserted into the existing hierarchy. To do this, please click on the **"New Parent Group"** button in the **Parent Group tab**.

The drop-down list can be used to select the group that is to be above the group just created in the organisation chart. With "**Valid from**" and "**Valid to**", the validity period of this assignment can optionally be defined. 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 organisation chart is imminent - this can be planned here at an early stage (e.g.: Valid from 01.09.) and is then automatically activated on the specified date.

Click on "**Save**" to apply the assignment.

Child Group

Here you can define the groups that are to be placed below the current group in the hierarchy of the company. Please note that the groups that are added in this tab are **automatically assigned to the current group as a parent group**. Normally, this tab is empty, and a parent group is only created under Parent Group, which automatically determines which groups are further down in the hierarchy.

Roles

By clicking on Role Assignment, a role can be assigned 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 personnel matters for the company.

Click on the 3 horizontal dots to select the desired role (e.g. Personnel). Under **competence target** you have the possibility to select a **person** or a **group** for which the current group is to perform the selected role.

Example: If one selects Personnel as the role and Person as the competence target, then the current group is responsible in personnel matters for the selected person XYZ. This means that all members of this group are responsible for personnel matters concerning person XYZ.

With **Valid from** and **Valid to**, a validity period for the role assignment can be defined. Clicking on Save saves the settings.

Roles can be edited or deleted by clicking on the corresponding icons.

Persons

You can find out how to assign people to a group by clicking on the following link: *Add employees to a group [Link will be added soon]*
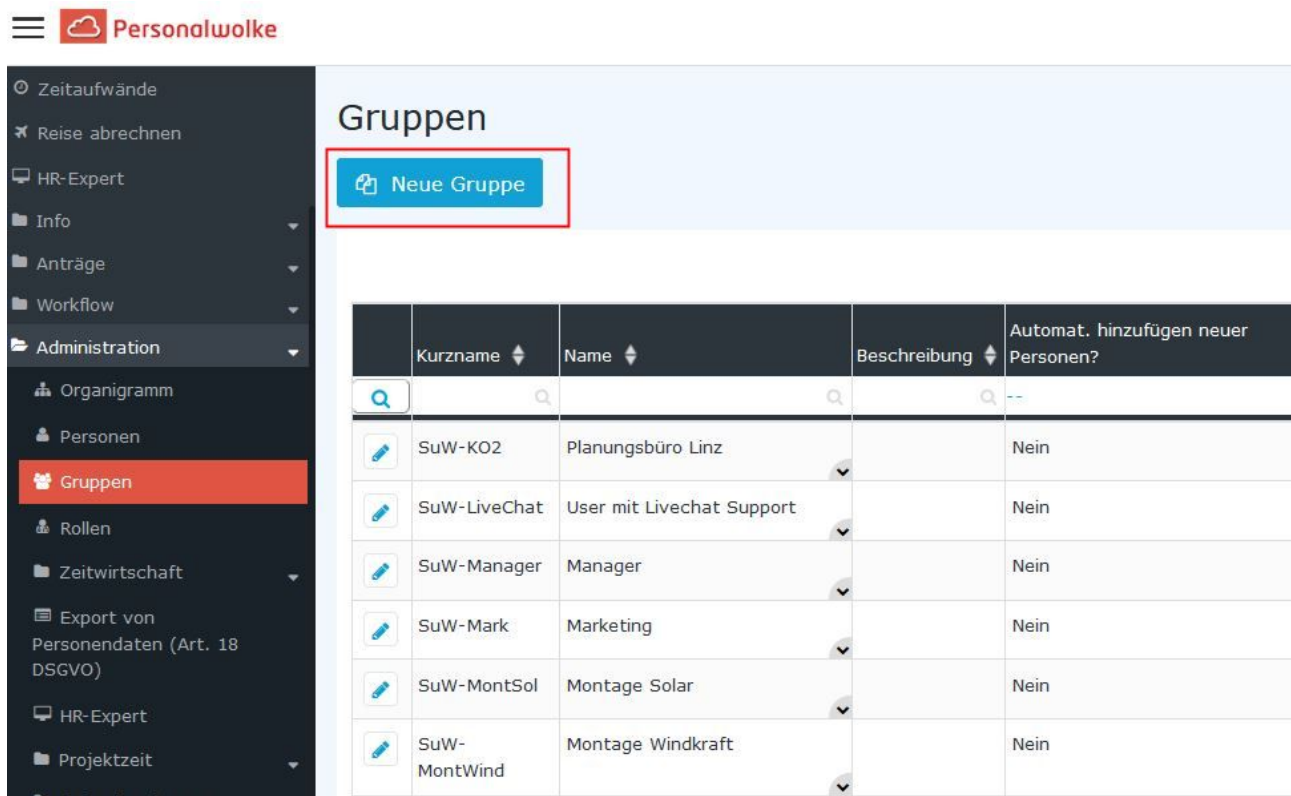
Create a new loose group

> N O T I Z
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> Note: the creation of new **cost centres** or **locations** is done in the same way as the creation of loose groups.

Click on the menu item "**Groups**" in the menu tree under **"Administration"**.

In the following list you will see an **overview of all Loose / hierarchical (organigram) groups** in the company. Click on **"New Group".**

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- **Description** (optional): e.g.:Plant Planning Location Vienna

- **Valid from/until**: Limitation possible, automatically preset with the current date or with 01.01.3000.
- **Add new person automatically**: Checkbox for automations

> W A R N U N G
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> EIt makes sense to activate the checkbox "**Automatically add new person**" for the **XXX-ALLE** group (for all employees), because every new employee MUST be a member of the XXX-ALLE group in order to be able to use the system at all. f course, this also applies to other groups specific to your company, for which all employees should automatically be members.

> W A R N U N G
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> If you also use other Personalwolke modules, such as Project Time or Travel, it makes sense to activate the automatic addition to the respective basic user group.

Clicking on **Save** creates the group and additional tabs appear:

> N O T I Z
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> Parent and child groups do not exist in loose groups, as they are not embedded in an organisational chart.

For daily use, the two tabs Roles and People are particularly relevant here.

Roles

By clicking on **"New Role Holder",** a role can be assigned to the group as a whole (Supervisor, Personnel). For example, if the role Personnel is assigned, all members of this group are automatically assigned the role Personnel and are thus responsible for personnel matters for the company. This also applies automatically to each new employee assigned to this group.

Persons

You can find out how to assign people to a group by clicking on the following link: *Add employees to a group [Link will be added soon]*

> NOTIZ
>
> Note: If the structure of your organisation also includes **cost centres** and **locations**, they can be created in the same way by selecting them from the drop-down list in the **"Organisation structure" field.**

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1. https://extranet.workflow.at/daisy/personalwolke-admin/6351-dsy/edit/481f33007e65747420725f1534154177294e2428/part-SimpleDocumentContent#hierarchischeGruppe

2. https://extranet.workflow.at/daisy/personalwolke-admin/6351-dsy/edit/7a1b2b5721692180596e4e58448e5a623e15664c/part-SimpleDocumentContent#loseGruppe