Groups - Masterdata of a group

General

In the following, the mask for a group (organisational unit=hierarchical group, loose group, location, cost centre) is described.

You will find information on the following parts of the mask:

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Header

- **Clien**t: organisation name
- **Shortname**: prefix + name abbreviation
- **Name**: written out group name
- **Description**: for a more detailed explanation of the group
- **Orgstructure**: refers to the type of group (organisational chart=hierarchical group, loose group, location, cost centre) - cannot be changed!
- **Group type:** automatically filled in after selecting "Orgstructure"

- **Valid from/till**: from the date the group was created or its validity start date to the expiry date.
- **Add new person automatically**: only useful for loose groups!

Changing the group name is also described under *"Change short name/group name" [Link will follow soon]*.

Parent Group

This tab is only visible for hierarchical groups (organigram groups, organisational units).
The organisational unit to which the group is subordinate is indicated here.

Each organisational unit, except for of the highest ("management") and the group of ex-employees, must have a superordinate group.

A change in the assignment to a superordinate group is described under "*How to create a group*" or under "*Change department/group hierarchy*". *[Links will follow soon]*

Child Groups

This tab is only visible for hierarchical groups (organigram groups, organisational units).

Whether an organisational unit has (a) subgroup(s) can be seen from the organigram.

It is also possible to enter several subordinate groups for one group.

A change in the assignment to a subordinate group is described in the chapters "*How to create a group*" or "Change department/group hierarchy".[9] *[links will be added soon]*
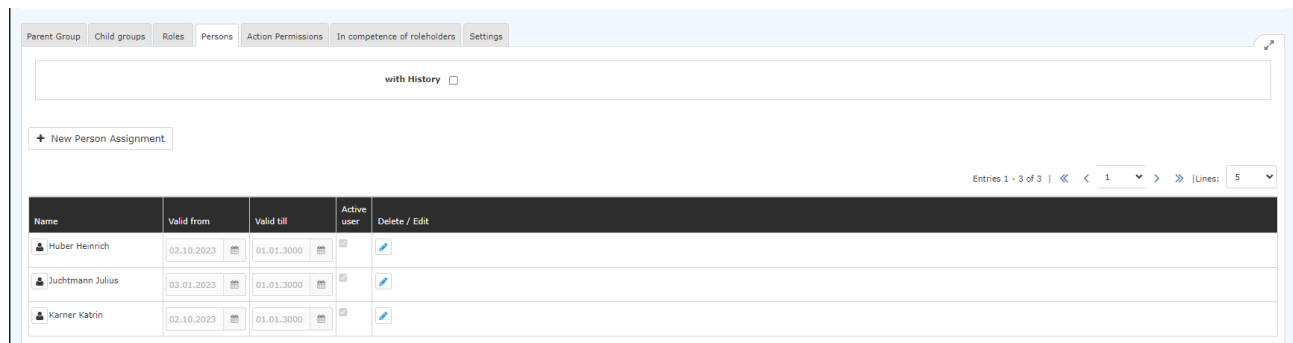
Roles

A group can, but does not have to, have roles.

But as soon as a role has been assigned to a group, every member of this group also automatically has this role (="inherits" it from the group)!

The assignment of roles to a group is described under "*Creating and editing role assignments"* in the subchapter "*About the group that is to receive the role". [Links will be added soon]*
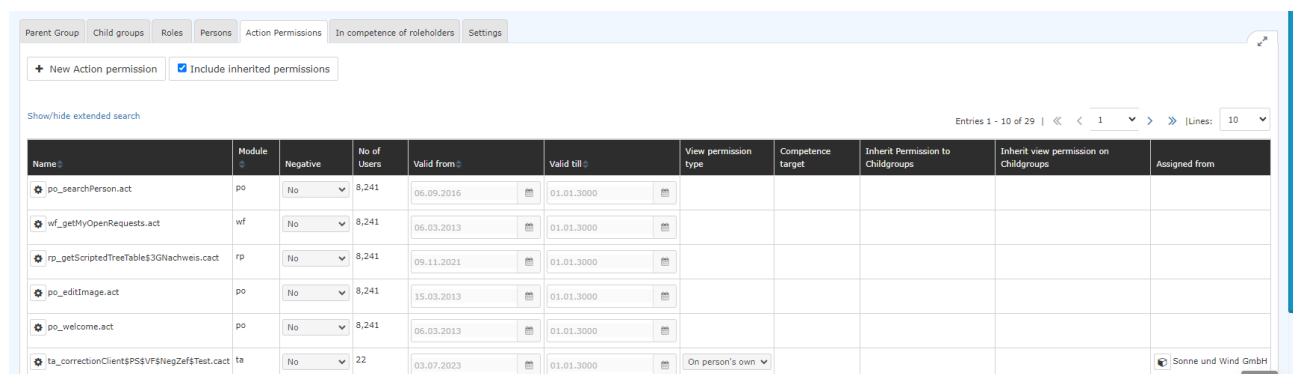
Persons

In this case, persons are all employees who have been assigned to this group.

The assignment of staff members to a group is done via the instructions according to "*Add staff member to a group"* or via the organisation chart via "*Move employees to another department/group"[10]* (only possible for hierarchical groups, not for loose groups!).
Assignment to a group directly via the employee's profile is also possible, see "*New person"/"Groups"* tab. [Link will be added soon]

Action permissions

This tab informs about the permissions for actions that the members of this group or the employees of this organisational unit have.
Basically, this tab is for information only, changes are not possible.

The action permissions shown here are relevant above all in communication with the system administrators.

The data listed in the table refers to the action permissions themselves, such as the number of users and the validity. This data is not related to your company.

"**Include inherited action authorisations"**: here it is possible to select those authorisations that the group has only received through belonging to a superordinate group or through the client (=inherited action authorisations).

In competence of roleholders

This tab shows which role holders have responsibility for this group or its members/employees, i.e. in the area of competence of which role holders this group lies.

For example, it lists who is responsible for the personnel administration of this group or who is responsible as a supervisor.

Settings

In the group's master data, there is a standardised setting: "Workflow Assignments".

This contains the following functions, which are activated by clicking on the respective buttons.

- **"Reevaluate assignments on all open activities assigned as Performer to members of the Group"**

Due to role changes, transfers of employees, etc., it may become necessary to update assigned activities. Click this button to start the reassignment. This will be implemented immediately.

- **"Reevaluate assignments on all running processes started as Author by members of the Group"**

This concerns the reverse direction: if the starters of such activities have changed due to changes in roles and groups, an update can be carried out by clicking on this button.

1. /daisy/personalwolke-default-en/6312-dsy/g3/g3/6468-dsy.html
2. /daisy/personalwolke-default-en/6312-dsy/g3/g3/6466-dsy.html