

# FAQ: Add persons to a group

Select the item **Groups** in the menu tree under **Administration**.

This menu item provides a **list of all created groups** (loose groups and hierarchical groups) of the client (company).

Groups

New group

PrintPDFExcel

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| Shortname            | Name                         | Description                             | Auto-add new persons? | Client              | Orgstructure     | Valid from           | Valid till           |
|----------------------|------------------------------|-----------------------------------------|-----------------------|---------------------|------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/>         | <input type="text"/>                    | <input type="text"/>  | All                 | All              | <input type="text"/> | <input type="text"/> |
| SuW-Coop             | Co-operativ buildings        |                                         | No                    | Sonne und Wind GmbH | Organigramm SuW  | Jun 19, 2023         | Jan 1, 3000          |
| SuW-EE               | Energy Experts               |                                         | No                    | Sonne und Wind GmbH | Lose Gruppen SuW | Jun 20, 2023         | Jan 1, 3000          |
| SuW-Eink             | Einkauf                      |                                         | No                    | Sonne und Wind GmbH | Organigramm SuW  | Mar 3, 2022          | Jan 1, 3000          |
| SuW-Fair             | Trade fair organisation      |                                         | No                    | Sonne und Wind GmbH | Organigramm SuW  | Oct 18, 2023         | Jan 1, 3000          |
| SuW-Fem              | Frauen                       |                                         | No                    | Sonne und Wind GmbH | Lose Gruppen SuW | Jan 25, 2023         | Jan 1, 3000          |
| SuW-FF               | Finanzierung und Förderungen | Finanzierungs- und Förderungsabwicklung | No                    | Sonne und Wind GmbH | Organigramm SuW  | Jan 2, 2023          | Jan 1, 3000          |
| SuW-Firm             | SuW-Firmensitz               |                                         | No                    | Sonne und Wind GmbH | Standorte SuW    | Jul 17, 2022         | Jan 1, 3000          |
| SuW-FuE              | Forschung und Entwicklung    |                                         | No                    | Sonne und Wind GmbH | Organigramm SuW  | May 12, 2022         | Jan 1, 3000          |
| SuW-GuI              | Gewerbe und Industrie        | Kunden aus Gewerbe und Industrie        | No                    | Sonne und Wind GmbH | Organigramm SuW  | Jan 2, 2023          | Jan 1, 3000          |
| SuW-HRX              | HRX User                     |                                         | No                    | Sonne und Wind GmbH | Lose Gruppen SuW | Mar 3, 2022          | Jan 1, 3000          |

Entry 11-20 of 50 << 2 >>

Using the input fields under **Short name**, **Name**, **Description**, **Client**, **Organisational structure**, **Valid from** and **Valid to**, the list can be restricted accordingly.

For example, by entering "M" in the Short name field, the list can be restricted to groups whose short name contains at least one "M".

# Groups

 New group

|                                                                                     | Shortname ↕                                                                       | Name ↕                                                                                | Description ↕ |
|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------|
|    |  | M  |               |
|    | SuW-Admin                                                                         | Admin                                                                                 |               |
|    | SuW-ALLE                                                                          | Alle Mitarbeiter                                                                      |               |
|    | SuW-AUS                                                                           | Sonne und Wind Ex-Mitarbeiter                                                         |               |
|    | SuW-Firm                                                                          | SuW-Firmensitz                                                                        |               |
|    | SuW-LiveChat                                                                      | User mit Livechat Support                                                             |               |
|    | SuW-Manager                                                                       | Manager                                                                               |               |
|    | SuW-Mark                                                                          | Marketing                                                                             |               |
|  | SuW-MontSol                                                                       | Montage Solar                                                                         |               |
|  | SuW-MontWind                                                                      | Montage Windkraft                                                                     |               |
|  | SuW-PMSol                                                                         | Agiles Projektmanagement Solar                                                        |               |

To edit the desired group, simply click in the line or on the

edit  symbol.

## Add a person

After selecting a group, you can add staff members to the selected group by clicking on the **Persons tab**.

NOTIZ

**ATTENTION:** Please note that an employee can only be a member of ONE hierarchical group (group from the organigram) at any one time, but can be a member of any number of Loose groups at the same time. The following screenshot shows whether you are currently editing an organigram group or a Loose group (marked in red).

By clicking on **New Person Assignment**, members can be added to this group.

Group

Save Save & Close Back Delete Edit in HR-Expert Print

Client Sonne und Wind GmbH Orgstructure Organigramm SuW

Shortname SuW-Mark Group type Organisationseinheit

Name Marketing Valid from 29.03.2022

Description Valid till 01.01.3000

Top Level Group ☐ Automatically add new persons to this group ☐

Parent Group Child groups Roles Persons Action Permissions In competence of roleholders Settings

with History ☐

+ New Person Assignment

Entries 1 - 2 of 2 | < 1 > » | Lines: 5

| Name           | Valid from | Valid till | Active user                         | Delete / Edit                               |
|----------------|------------|------------|-------------------------------------|---------------------------------------------|
| Irdner Iris    | 14.09.2023 | 01.01.3000 | <input checked="" type="checkbox"/> | <a href="#">Delete</a> <a href="#">Edit</a> |
| Micosi Michael | 02.11.2022 | 01.01.3000 | <input checked="" type="checkbox"/> | <a href="#">Delete</a> <a href="#">Edit</a> |

After clicking, the following table appears:

Parent Group Child groups Roles Persons Action Permissions In competence of roleholders Settings

with History ☐

New Person Assignment

New person Valid from Valid till

Choose persons

After selecting the person (Huber Heinrich in this case; the selection can be made either by simply typing in the field or by clicking on the button with the 3 dots), you can click on Save. The fields **Valid from** and **Valid to** are either filled with the default values (Valid from: Today; Valid to 1.1.3000) or - as in this case - there is the option to enter a concrete date to specify that Mr. Heinrich Huber should be a member of this group from 01.03.2023 onwards.

#### NOTIZ

**Note:** The previous assignment of an employee to a group in the organisation chart is automatically deleted when the new assignment becomes valid.

Parent Group Child groups Roles Persons Action Permissions In competence of roleholders Settings

with History ☐

New Person Assignment

New person Valid from Valid till

Charon Claudia (SuW-PLinz) x 01.12.2023

saving, the staff member appears in the list of group members.

After

| Parent Group                                                                                     | Child groups                                                                                 | Roles                                                                                        | Persons                                                                           | Action Permissions                                                                | In competence of roleholders | Settings |
|--------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------------|----------|
| with History <input type="checkbox"/>                                                            |                                                                                              |                                                                                              |                                                                                   |                                                                                   |                              |          |
| + New Person Assignment                                                                          |                                                                                              |                                                                                              |                                                                                   |                                                                                   |                              |          |
| Entries 1 - 3 of 3   << < 1 > >>   Lines: 5                                                      |                                                                                              |                                                                                              |                                                                                   |                                                                                   |                              |          |
| Name                                                                                             | Valid from                                                                                   | Valid till                                                                                   | Active user                                                                       | Delete / Edit                                                                     |                              |          |
|  Charon Claudia | 01.12.2023  | 01.01.3000  |  |  |                              |          |
|  Irdrner Iris   | 14.09.2023  | 01.01.3000  |  |  |                              |          |
|  Micosi Michael | 02.11.2022  | 01.01.3000  |  |  |                              |          |

The membership expiry date can be edited by clicking on the edit icon



## Additional information

You can find more information on the topic of groups under the following link: [Groups](#)<sup>1</sup>

1. /daisy/personalwolke-default/5884-dsy.html?language=4