

Organigram - Move employees to another department (group)

Allgemeines

The organigram provides an intuitive and convenient way to move staff from one hierarchical group to another within the organisation.

NOTIZ

Adding / removing an employee to / from a LOOSE group is NOT possible via the organigram! For this use case, please proceed as described under "Transferring employees to another department" or "Adding employees to a group".

Procedure

In the menu tree under Administration, select the item organigram and in the mask change the value for "Show employees" from No to Yes.

The screenshot shows the 'Organigram' mask in a software application. At the top left, there is a 'Start' button and a 'Hide searchform' button. The main area contains several input fields: 'Client' with the value 'Sonne und Wind GmbH', 'Date' with the value '14.09.2023', and 'Show employees' with the value 'Yes'. The 'Show employees' field is highlighted with a red rectangle. Below these fields are 'Searchkey' and a checkbox labeled 'Consider whether person allows deputy or not'. At the bottom, there is a 'Roles' section with a list of roles: 'Auswertung', 'BenutzerUmschalten', 'Geschäftsführer', 'Kollege', 'Reisekostenprüfung', 'Reisekostenprüfung 2', and 'Vorgesetzter'. To the right of the roles list are navigation buttons: '>', '>>', '<', and '<<'.

Then click on "Start" to start the output of the organigram.

Organigramm

Start

Show searchform

Organigramm SuW -

SuW-AUS - Sonne und Wind Ex-Mitarbeiter

Ildrich Ines

SuW-CEO - Geschäftsleitung

Adam Angelika

Sonne Susanne

Wind Werner

SuW-Personal - Personal

Rennard Renate

SuW-Mark - Marketing

Huber Heinrich

Micosi Michael

SuW-SALES - Sales Overhead

SuW-GuI - Gewerbe und Industrie

Irdner Iris

SuW-Serv - Service

SuW-Priv - Privatkunden

SuW-FF - Finanzierung und Förderungen

Leonhardtsberger Leo

SuW-Akqu - Aquisition

SuW-Coop - Co-operativ buildings

SuW-Eink - Einkauf

Berger Barbara

This overview shows the groups and their respective employees, as well as the position of the group within the organigram (hierarchy). In the example above, we can see that the group



(SuW-CEO Management has three employees)



(and the group SuW-SALES includes two subgroups, SuW-Akqu and -Coop, which currently have no assigned employees.)

We now want to move the employee "Irdner Iris" from the group SuW-GuI - Gewerbe und Industrie to the group SuW-Mark. To do this, we click on Mr. Juchtmann with the **right mouse button** and select **Cut person**.

Organigramm

Start

Show searchform

- Organigramm SuW -
 - SuW-AUS - Sonne und Wind Ex-Mitarbeiter
 - Ildrich Ines
 - SuW-CEO - Geschäftsleitung
 - Adam Angelika
 - Sonne Susanne
 - Wind Werner
 - SuW-Personal - Personal
 - Rennard Renate
 - SuW-Mark - Marketing
 - Huber Heinrich
 - Micosi Michael
 - SuW-SALES - Sales Overhead
 - SuW-GuI - Gewerbe und Industrie
 - Irdner Iris
 - SuW-Serv - Edit Person
 - SuW-Priv - Pr Cut Person
 - SuW-FF - Finanzierung und Forderungen
 - Leonhardtsherner Leo

Then click on the SuW-Mark group with the **right mouse button** and select **Insert Person**.

Organigramm



Start



Show searchform

Organigramm SuW -

SuW-AUS - Sonne und Wind Ex-Mitarbeiter

Ildrich Ines

SuW-CEO - Geschäftsleitung

Adam Angelika

Sonne Susanne

Wind Werner

SuW-Personal - Personal

Rennard Renate

SuW-Mark - Marketing

Huber Heinrich

Micosi Michael

SuW-SALES - Sales

SuW-GuI - Gewerbesteuer

Irdner Iris

SuW-Serv - Service

SuW-Priv - Privatkunden

SuW-FF - Finanzierung und Förderungen

Leonhardtberger Lea

Edit Group

Cut Group

Paste Group

Paste Person

The change is visible immediately.

Organigramm SuW -

SuW-AUS - Sonne und Wind Ex-Mitarbeiter

Ildrich Ines

SuW-CEO - Geschäftsleitung

Adam Angelika

Sonne Susanne

Wind Werner

SuW-Personal - Personal

Rennard Renate

SuW-Mark - Marketing

Huber Heinrich

Irdner Iris

Micosi Michael

SuW-SALES - Sales Overhead

The changes are also immediately visible in the person administration under the Groups tab. Before cutting and moving to the new group....

Person

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

First name Iris Valid from 23.05.2023

Lastname Irdner Valid till 01.01.3000

Master data Groups Roles Action Permissions In competence of roleholders Cache Login Attempts NFC Tags Settings

Organigramm SuW

with History ☐

New group		Valid from	Valid till
Select an Option			

Orgstructure	Name	Valid from	Valid till	Delete
Organigramm SuW	SuW-Gul (Gewerbe und Industrie)	23.05.2023	01.01.3000	

... and after:

Person

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

First name Iris Valid from 23.05.2023

Lastname Irdner Valid till 01.01.3000

Master data Groups Roles Action Permissions In competence of roleholders Cache Login Attempts NFC Tags Settings

Organigramm SuW

with History ☐

New group		Valid from	Valid till
Select an Option			

Orgstructure	Name	Valid from	Valid till	Delete
Organigramm SuW	SuW-Mark (Marketing)	14.09.2023	01.01.3000	

Further information

For another way to add a staff member to a new group, see chapters "Transfer Staff to Another Department" and "Add Staff to a Group"

For more information on the organigram, see "Organigram".

The HR Expert application also offers the possibility to change the department/group membership directly in the employee profile. For information on this screen, see "Organisation-Groups tab".

[Editors note: the links to the chapters will follow soon!]