

FAQ: Adding 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
⚙	🔍	🔍	🔍	⌵	⌵	🔍	🔍
⚙	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	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	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 ↕
	<input type="text"/>	<input type="text" value="M"/>	<input type="text"/>
	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"/>	Delete / Edit
Micosi Michael	02.11.2022	01.01.3000	<input checked="" type="checkbox"/>	Delete / Edit

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

After

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

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](#)¹

- 1. </daisy/webdesk-manual-admin/5884-dsy.html?language=4>