

FAQ: Add/remove persons to/from 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).

The screenshot shows the 'Groups' application interface. At the top, there is a 'New group' button and navigation options for Print, PDF, and Excel. Below this is a table with the following columns: Shortname, Name, Description, Auto-add new persons?, Client, Orgstructure, Valid from, and Valid till. The table contains 11 rows of data, each representing a different group. The 'Auto-add new persons?' column has a dropdown menu set to 'All'. The 'Valid from' and 'Valid till' columns show dates and times.











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	No	Sonne und Wind GmbH	Organigramm SuW	Jan 2, 2023	Jan 1, 3000
SuW-Firm	SuW-Firmensetz		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

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" value="M"/>	<input type="text" value=""/>
	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"/>	
Micosi Michael	02.11.2022	01.01.3000	<input checked="" type="checkbox"/>	

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.

Name	Valid from	Valid till	Active user	Delete / Edit
Charon Claudia	01.12.2023	01.01.3000	<input type="checkbox"/>	
Irdner Iris	14.09.2023	01.01.3000	<input type="checkbox"/>	
Micosi Michael	02.11.2022	01.01.3000	<input type="checkbox"/>	

Remove a person from a group

Membership of an organisational chart group can only be changed by moving to another organisational chart group, as each employee can be a member of one, and only one, organisational chart group at any one time.

Therefore, if you want to end membership of an organigram group, this is done by adding it to another organigram group.

Membership of a loose group can be terminated by entering the "Valid to" date.

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>