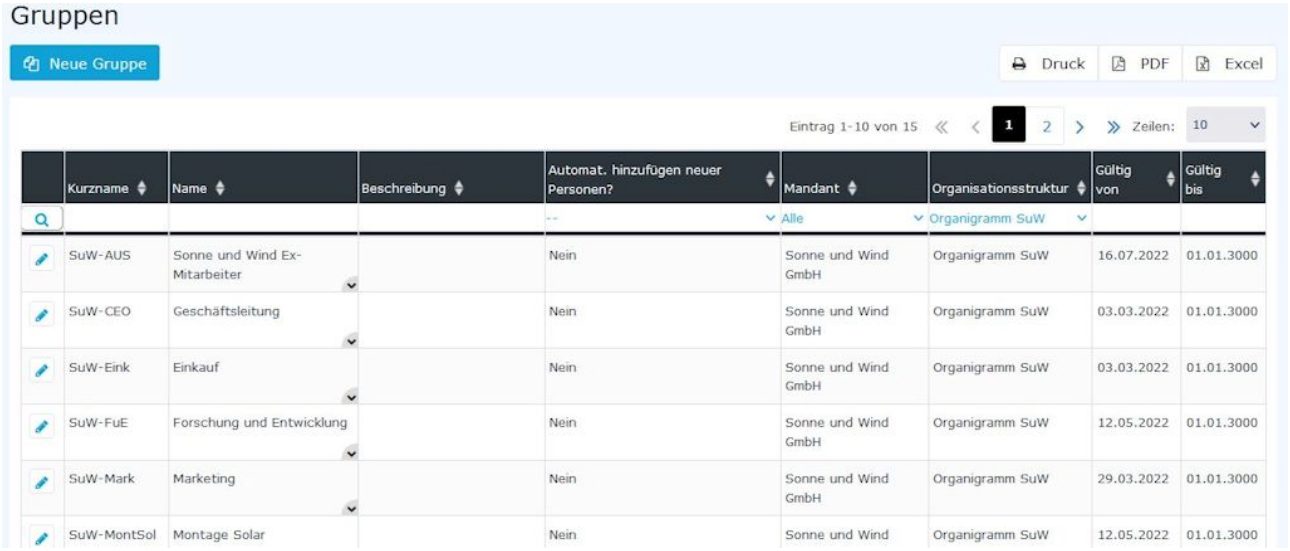
FAQ: Add employees to a group or end a group membership

In the menu tree under **Administration**, select the item **Groups**.

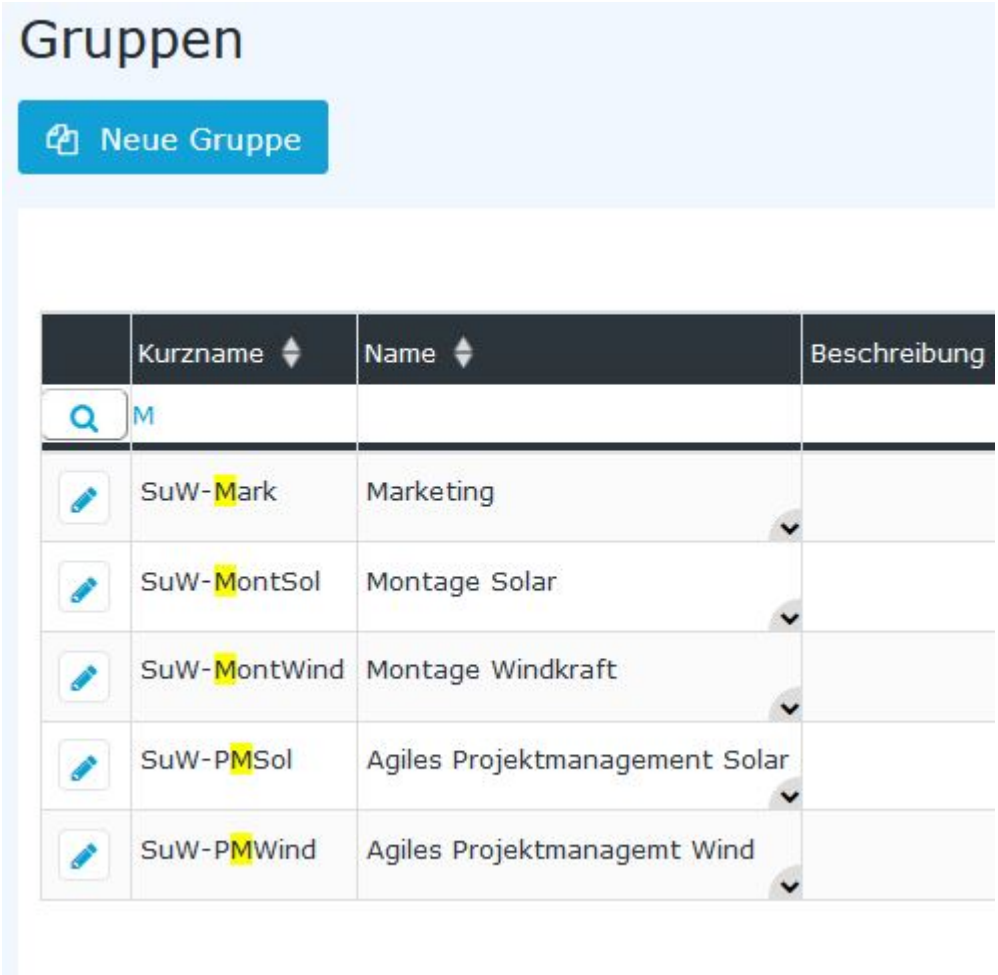
This menu item provides a **list of all created groups** (permission groups and organizational units) of the client (company).



[Note: the screenshots still contain the names "Organigram group" and "Loose groups" that were in use for organizational units and permission groups before July 2024.]

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

For example, entering "**M**" in the **Short name** field restricts the list to groups whose short name contains at least one "**M**".



To edit the desired group, simply click the row or the edit icon

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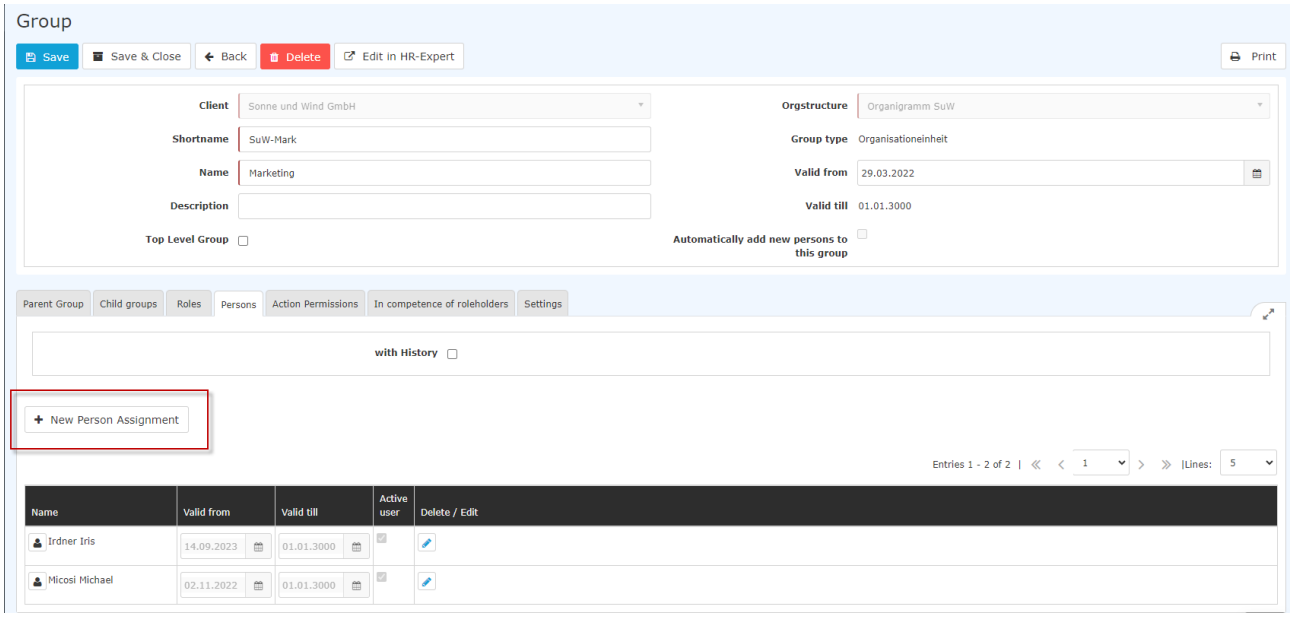
Add employees

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

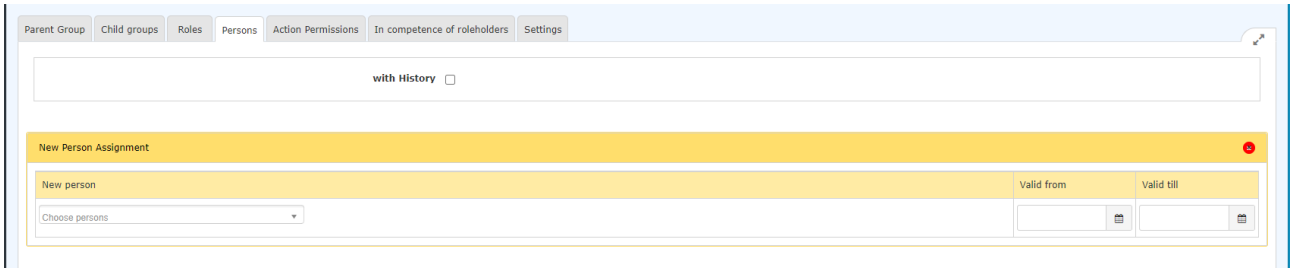
WARNUNG

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

Clicking **New person assignment** lets you add members to this group.



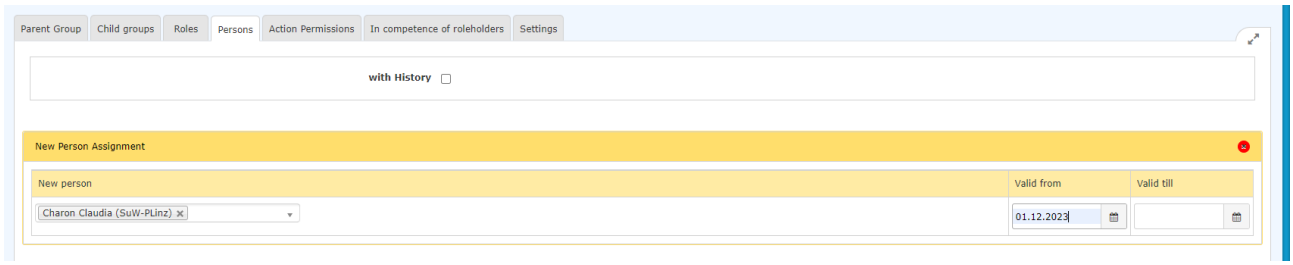
After clicking, the following table appears:



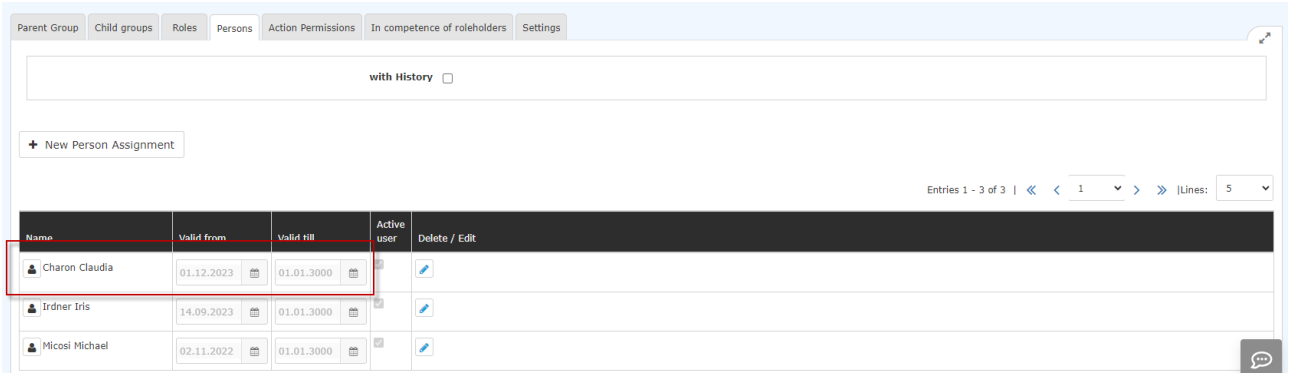
After selecting the person (Charon Claudia in this case; the selection can be made either by simply typing in the field or via the button with the 3 dots), you can click Save. The fields **Valid from** and **Valid to** are either filled with the default values (Valid from: today; Valid to: 1/1/3000), or - as in this case - you have the option of entering a specific date to specify that Ms. Charon is to be a member of this group from 12/01/2023.

NOTIZ

Note: An employee's previous assignment to a group in the organizational chart is automatically deleted when the new assignment becomes valid.



After **saving**, the employee appears in the list of group members.



Ending membership in a group

Membership in an organizational chart group can only be ended by moving to another organizational chart group, since each employee can be a member of one, and only one, organizational chart group at a time.

If you want to end membership in an organizational chart group (organizational unit), you do so by adding the employee to another organizational chart group.

Membership in a permission group can be ended by entering the "Valid to" date, by clicking the edit icon



and correcting the "Valid to" date accordingly.

Additional information

You can find more information on the topic of groups at the following link: Groups[1]

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