

# Dealing with role holders (assigning, editing, deleting)

In the following, you will learn how to **assign, edit or change a role via the "Roles" function.**

However, it is also possible to do this via the master data of the person or group. [Link will be added soon.]

## Start

To add a role (supervisor, staff) to a person or a group, please select **Roles** in the menu tree under **Administration**.

This will take you to an overview of the available roles.

Name	Description	Workflow-Id	Default Role	Client
Auswertung	Für den Erhalt von Auswertungen über Personen, Gruppen oder den Mandanten per Mail. Kompetenzziel sind die Person(en)/Gruppe(n)/Mandant, die ausgewertet werden sollen. Rolleninhaber ist die Person, die die Auswertung erhalten soll.	Auswertung	All	All
Benutzerumschalten		Benutzerumschalten		
Geschäftsführer		Geschäftsfuehrer		
Kollege		kollege		
Personal	Rolle für die Personalstelle pro Mandanten	Personal		
Reisekostenprüfung		Reisekostenprüfung		
Reisekostenprüfung 2		Reisekostenprüfung_2		
Vorgesetzter	definiert den direkten Vorgesetzten und wird in der Personalrolle NUR für den Workflow verwendet, Jedoch nicht für die Zuweisung von Aktionen!	Vorgesetzter		

Select the desired role by clicking on it. In the following view it is now possible to add new role owners (persons, groups) by clicking on **New Role holder assignment** or to **delete / edit existing role holders**

- [Assigning a new role holder<sup>1</sup>](#)
- [Editing or deleting a role holder<sup>2</sup>](#)

## Assigning a new role holder

Role

Name: Kollege | Valid from: 18.11.2021 | Valid till: 01.01.3000

Description: | Client: ---

Role Holder

+ New Roleholder assignment

Competence target	Role Holder	Name	Valid from	Valid till	Ranking	
Charon Claudia	Elsner Elisabeth	Elsner Elisabeth	03.06.2022	01.01.3000	1	[edit] [delete]
SuW-ALLE (Alle Mitarbeiter)	Dorner Daniel	Dorner Daniel	22.04.2022	01.01.3000	1	[edit] [delete]

The following input mask opens:

The parameters are explained as follows:

### Step 1: Select competence target

- **Person** - means that the selected role owner (step 2) performs the selected role (supervisor) for the selected person.
- **Group** - means that the selected role owner (step 2) performs the selected role (supervisor) for the selected group.
- **Client** - means that the selected role owner (step 2) exercises the selected role (supervisor) for the whole client (the whole company).

### Step 2: Select role holder

**Person** - means that the selected person performs the role (supervisor) for the selected competence target (person, group or client).

**Group** - means that the selected group (and thus ALL persons belonging to this group) performs the selected role (supervisor) for the selected competence target (person, group, client).

### Step 3: Set optional parameters

- **Valid from** - defines FROM when the selected role assignment is valid.
- **Valid until** - defines UNTIL which time the selected role assignment is valid.
- **Ranking** - defines whether the selected role owner performs the role as the main person in charge (=1), as the deputy (=2), as the deputy of the deputy (=3), and so on. The same ranking number can be assigned to several persons!

If the parameters are not specified in step 3, they will be assigned the default values:

- Valid from - current date
- Valid till - unlimited (01.01.3000)
- Ranking - 1 (main)

Clicking **Save** will apply the selected settings.

## Example 1

A person is to be added as a group manager. The assignment is to be valid from now until indefinitely and the person is to exercise this role with primary responsibility (=1).

- Competence target: Group, select group
- Role holder: Person, select person

Click on Save when finished!

## Example 2

Competence target	Role Holder	Valid from	Valid till	Ranking
Client Sonne und Wind GmbH	Group SuW-Personal (Personal)	01.12.2023	31.03.2024	1

In this example, the group SuW-Personal (role holder) is assigned a role for the entire client (the company Sonne und Wind GmbH, SuW). This assignment makes sense especially for the role Personnel, because in this way, for example, the group Human Resources can be assigned the role Personnel.

## Example 3

Competence target	Role Holder	Valid from	Valid till	Ranking
Group SuW-FuE (Forschung und Entwicklung)	Person Elsner Elisabeth (SuW-FuE)	01.11.2023	31.05.2024	1

In this example, the person Elsner Elisabeth (role holder) is assigned to the group SuW-FuW as manager in the period from 01.11.2023 to 31.05.2024 as first in ranking.

## Editing or deleting a role holder

Competence target	Role Holder	Name	Valid from	Valid till	Ranking	
Sonne und Wind GmbH		Elsner Elisabeth	28.02.2023	01.01.3000	1	[edit] [delete]
		Sonne Susanne	16.05.2023	01.01.3000	2	[edit] [delete]
		SuW-Personal	09.03.2022	01.01.3000	3	[edit] [delete]

After selecting the role, the role assignment can be

edited   
/ deleted



in the role holder overview. The competence target describes for which person, group, client the role holder is responsible. In addition, information about the selected validity period and the sequence can be seen here.

## Additional information

Example 3 represents probably the most common use case (a person is to be assigned to a group as a role owner). It is also important to know that the **assignment of a person is stronger than the assignment of a group, which in turn is stronger than the assignment of a client.**

An overview of the holders of **roles with responsibilities** (supervisor, personnel, travel expenses check) is also provided in the list of employees (Administration/People): here, those employees to whom this applies are specially marked by a badge /colored button, see the following image

Persons

+ New person

Print PDF Excel

Entry 1-20 of 22

Lastname	First name	Name	Client	Group	Username	Employee-ID	Email	TA-ID	Time zone	Active user	Valid from
			All							Yes	
Adam	Angelika	Angelika Adam	Sonne und Wind GmbH	SuW-CEO	SuWadamange	SuW22032801	angelika.adam@sonneundwind.at	5358		Yes	Mar 28, 2022
Berger	Barbara	Barbara Berger	Sonne und Wind GmbH	SuW-Eink	SuWbarberg	SuW22032802	barbara.berger@sonneundwind.at	5359		Yes	Mar 28, 2022
Charon	Claudia	Claudia Charon	Sonne und Wind GmbH	SuW-PLinz	SuWcharclau	SuW22032803	claudia.charon@sonneundwind.at	5406		Yes	Apr 5, 2022
Dorner	Daniel	Daniel Dorner	Sonne und Wind GmbH	SuW-ProdWind	SuWdanidorn	SuW22032804	daniel.dorner@sonneundwind.at	5460		Yes	Apr 22, 2022
Elsner	Elisabeth	Elisabeth Elsner	Sonne und Wind GmbH	SuW-FuE	SuWelsnells	SuW22032806	elisabeth.elsner@sonneundwind.at	5619		Yes	Jun 3, 2022
Ezquerria	Ernesto	Ernesto Ezquerria	Sonne und Wind GmbH	SuW-PMWind	SuWwezquerne	SuW22032820		6367		Yes	Jan 4, 2023
Foscanu	Fabiu	Fabiu Foscanu	Sonne und Wind GmbH	SuW-PMWind	SuWfoscfabi	SuW22032812	fabiu.foscanu@sonneundwind.at	62		Yes	Jul 15, 2022
Huber	Heinrich	Heinrich Huber	Sonne und Wind GmbH	SuW-Const	SuWhubehain	SuW22032811	heinrich.huber@sonneundwind.at	6967		Yes	Jun 10, 2022

For more information on roles, see chapter "[Roles](#)"!

1. </daisy/webdesk-manual-admin/5886-dsy.html?language=4>