Dealing with role holders (assigning, editing, deleting)

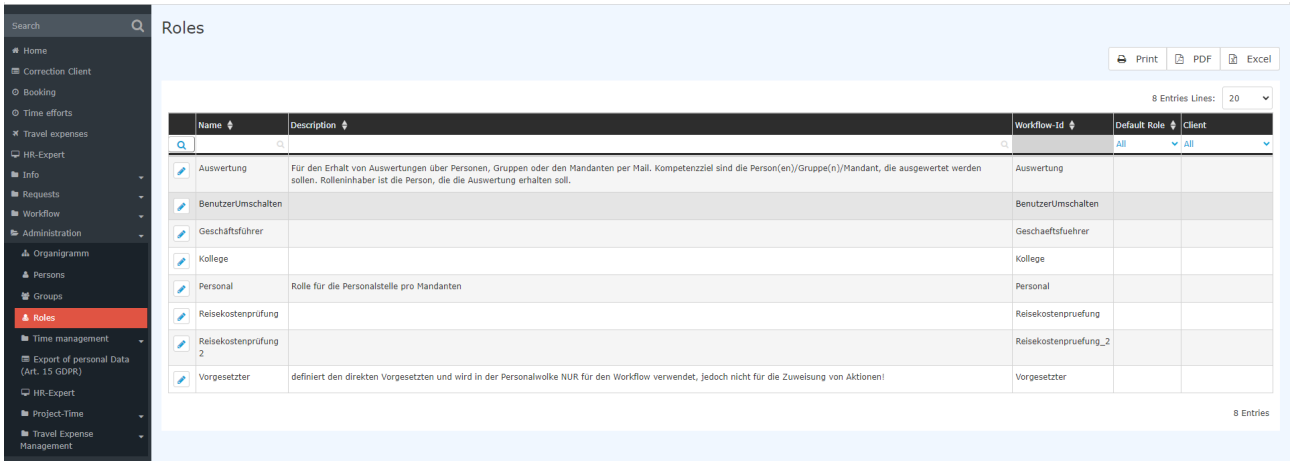
In the following, you will learn how to **assign, edit or change a role via the "Roles" function.**

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**.

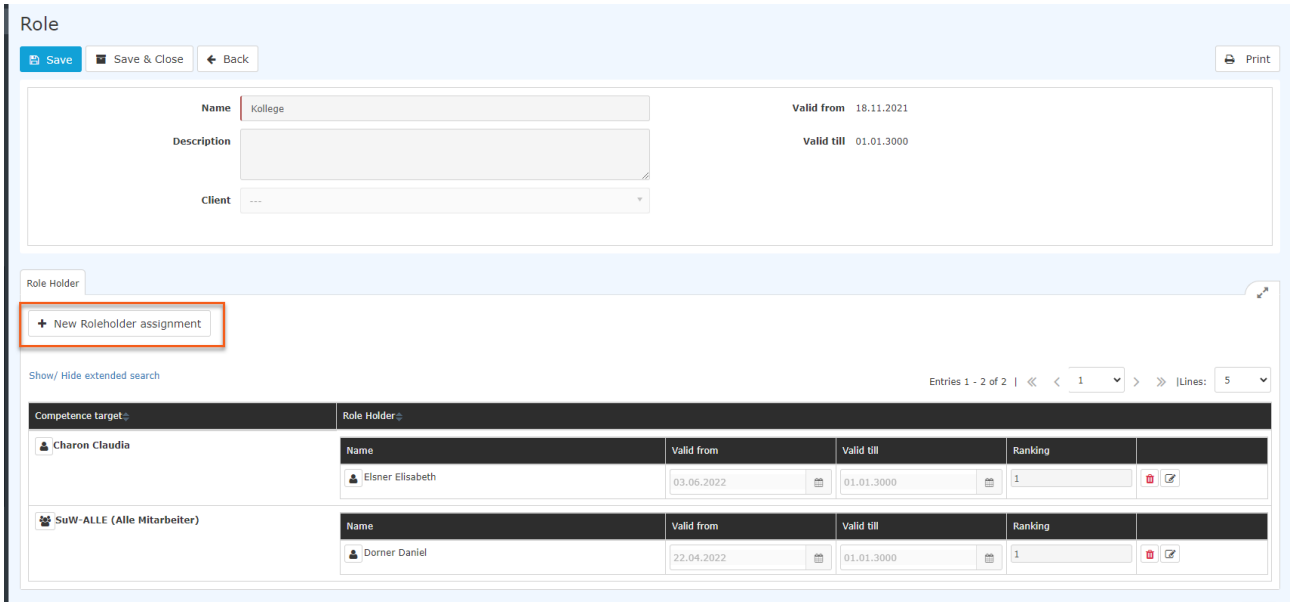
This will take you to an overview of the available roles.



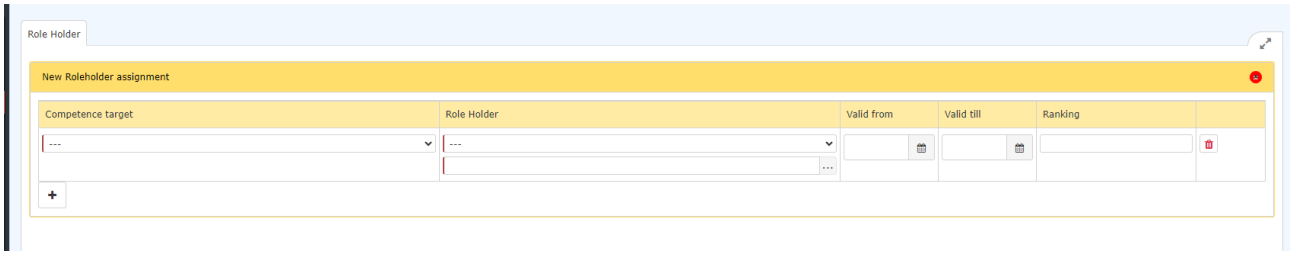
Select the desired role by clicking on it. In the following view it is now possible to add new role owners (persons, groups) by clicking on **New Role holder assignment** or to **delete / edit existing role holders**

- Assigning a new role holder[1]
- Editing or deleting a role holder[2]

Assigning a new role holder



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

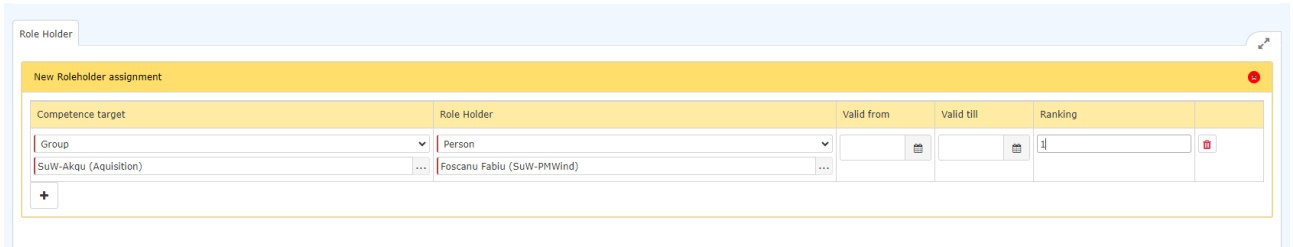
- **Valid from** - defines FROM when the selected role assignment is valid.
- **Valid until** - defines UNTIL which time the selected role assignment is valid.
- **Ranking** - defines whether the selected role owner performs the role as the main person in charge (=1), as the deputy (=2), as the deputy 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

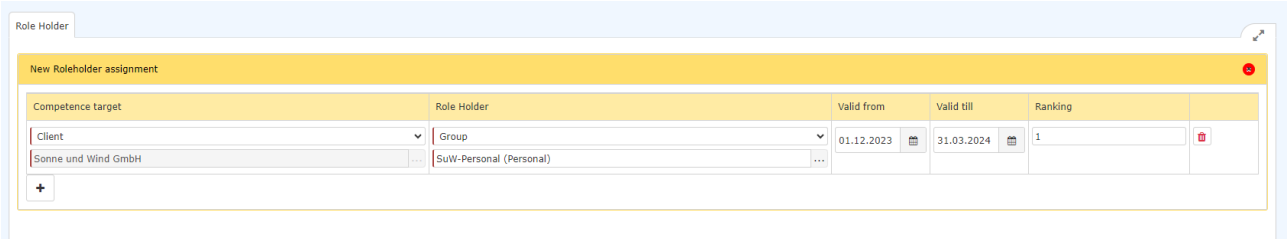


A person is to be added as a group manager. The assignment is to be valid from now until indefinitely and the person is to exercise this role with primary responsibility (=1).

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

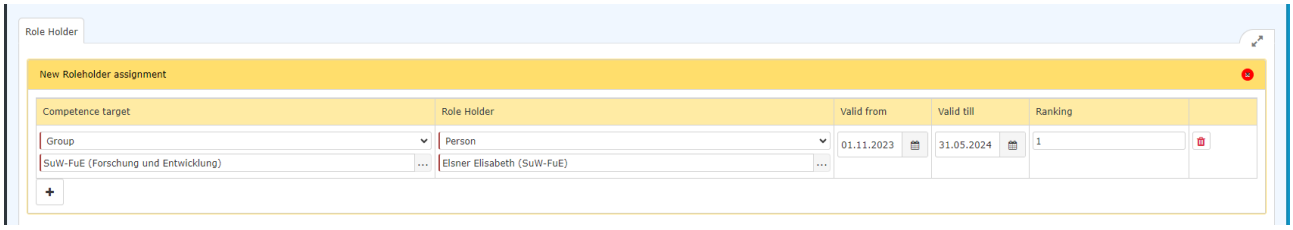
Click on Save when finished!

Example 2



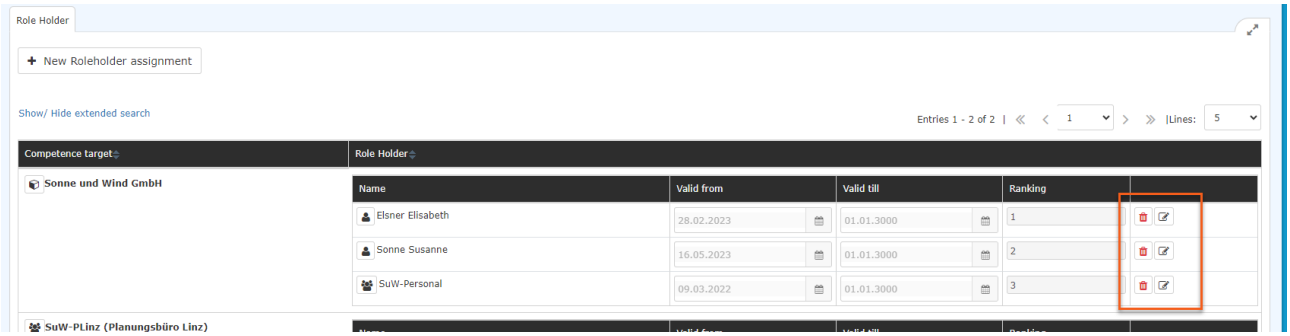
In this example, the group SuW-Personal (role holder) is assigned a role for the entire client (the company Sonne und Wind GmbH, SuW). This assignment makes sense especially for the role Personnel, because in this way, for example, the group Human Resources can be assigned the role Personnel.

Example 3



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 fist in ranking.

Editing or deleting a role holder



After selecting the role, the role assignment can be

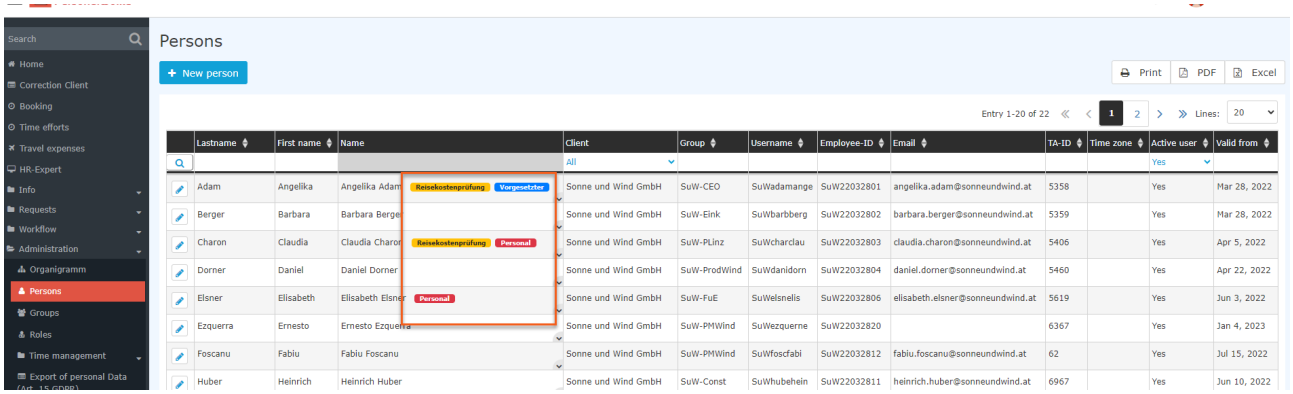
edited 
/ deleted



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



For more information on roles, see chapter "Roles[3]"!

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