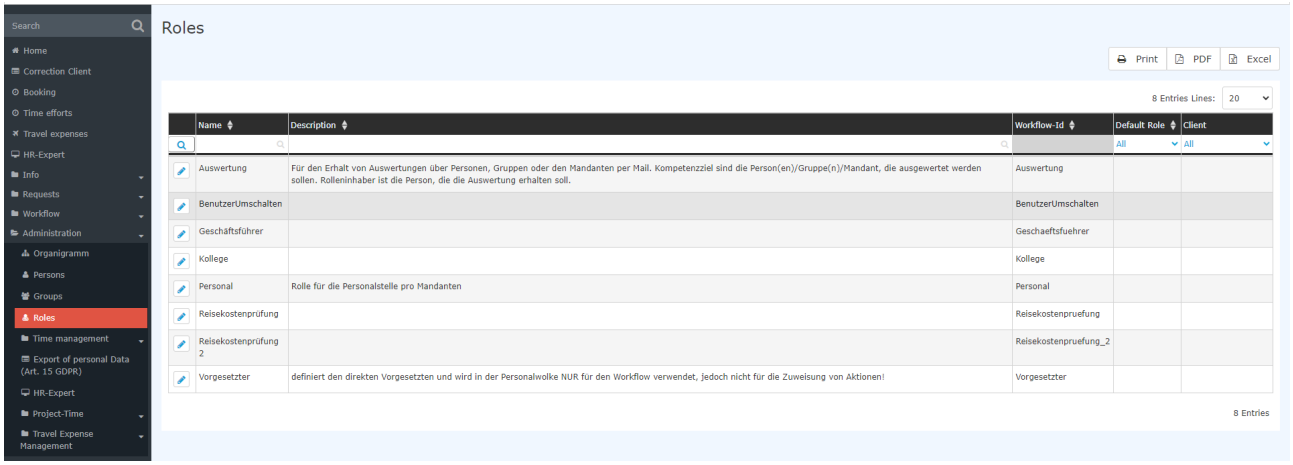
Dealing with role holders (assigning, editing, deleting)

General

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

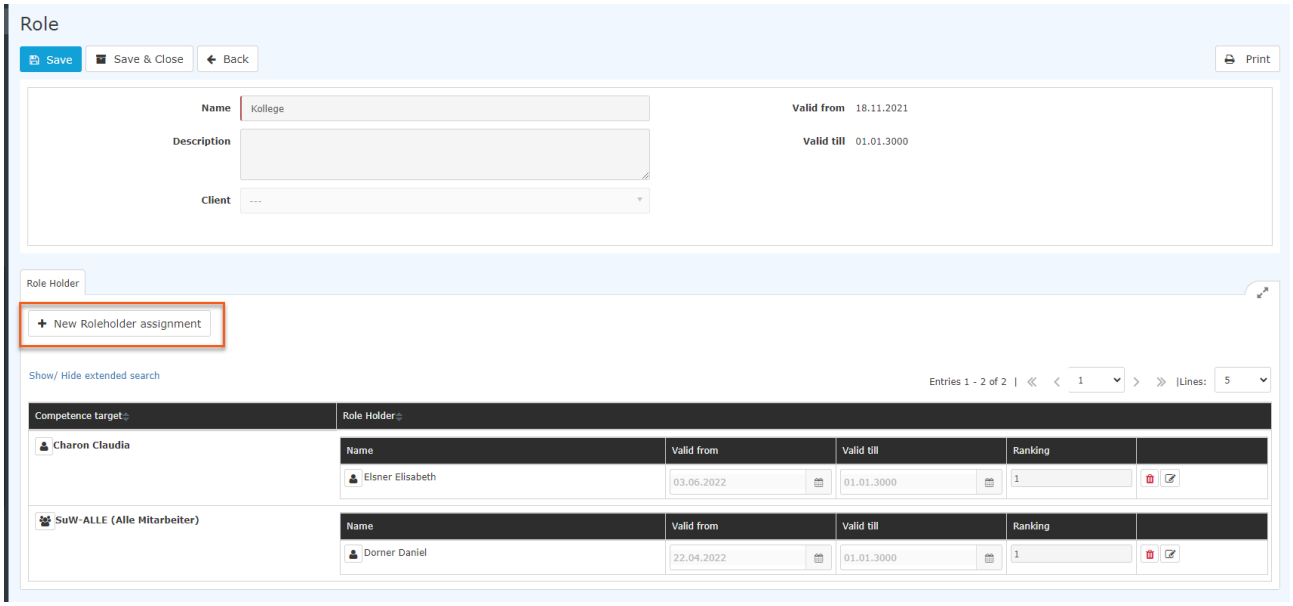
This takes you to an overview of the available roles.



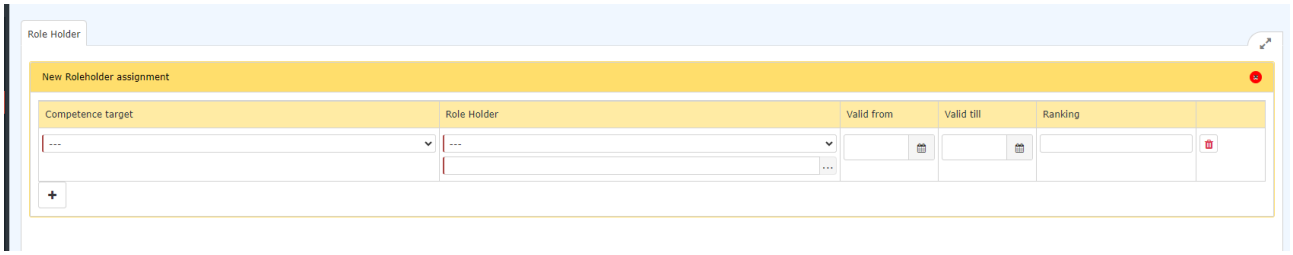
Select the desired role by clicking it. In the following view, you can now add new role holders (persons, groups) by clicking **New role holder** or **delete / edit existing role holders**.

- Adding a role holder[1]
- Deleting / editing a role holder[2]

Adding a role holder



The following input screen opens.



The parameters are explained as follows:

Step 1: Select the competence target

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

Step 2: Select the role holder

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

Step 3: Set optional parameters

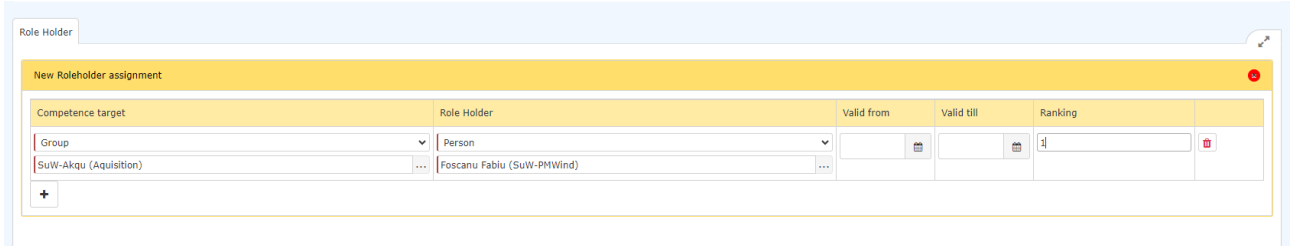
- **Valid from** - defines FROM which point in time the selected role assignment is valid.
- **Valid until** - defines UNTIL which point in time the selected role assignment is valid.
- **Ranking** - defines whether the selected role holder exercises the role as the person with primary responsibility (=1), as deputy (=2), as deputy of the deputy (=3), and so on. The same ranking can be assigned to several persons!

If the parameters in step 3 are not specified, they are set to the default values:

- Valid from - current date
- Valid until - unlimited (01.01.3000)
- Ranking - 1 (primary responsibility)

Clicking **Save** applies the selected settings.

Example 1

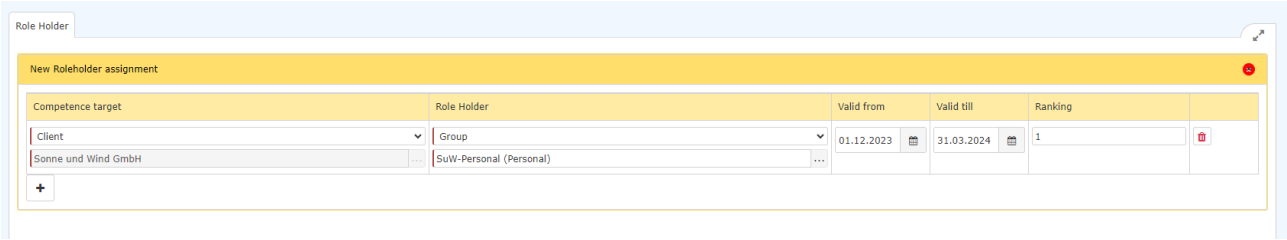


A person is to be added as supervisor for a group. The assignment is to be valid from now on with no end date, and the person is to exercise this role with primary responsibility (=1).

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

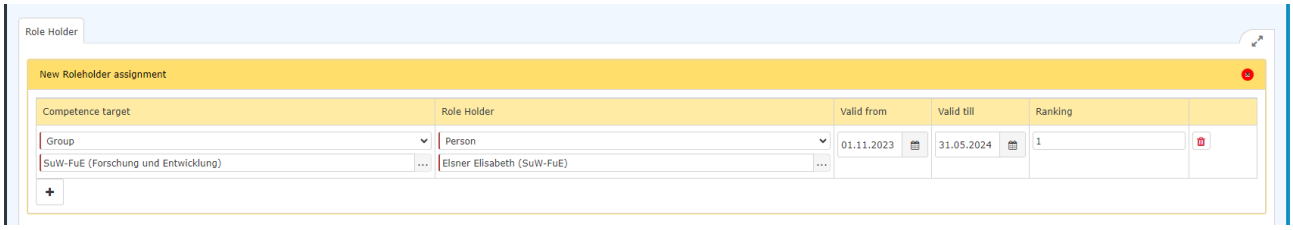
and save.

Example 2



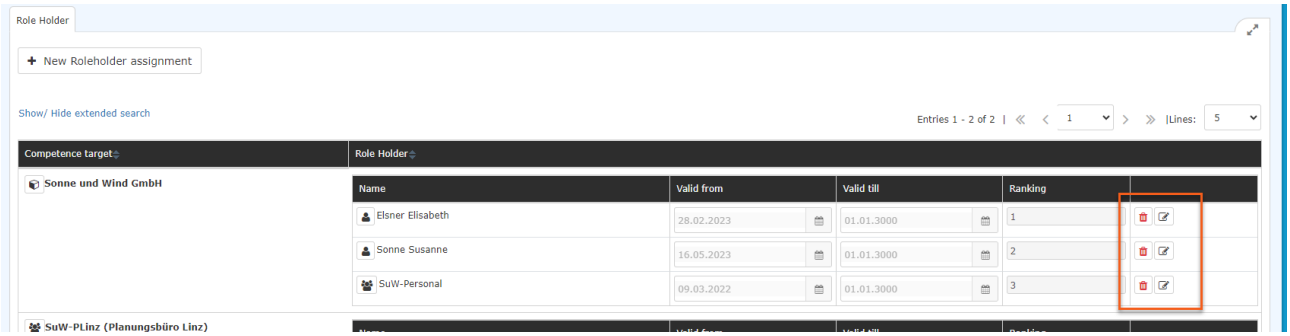
In this example, the group SuW-Personal (role holder) is assigned a role for the **entire client** (the company Sonne und Wind GmbH, SuW). This assignment makes the most sense for the HR role, because in this way, for example, the HR department group can be assigned the HR role.

Example 3



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

Deleting / editing a role holder



After selecting the role, the role assignment can be edited



/ deleted

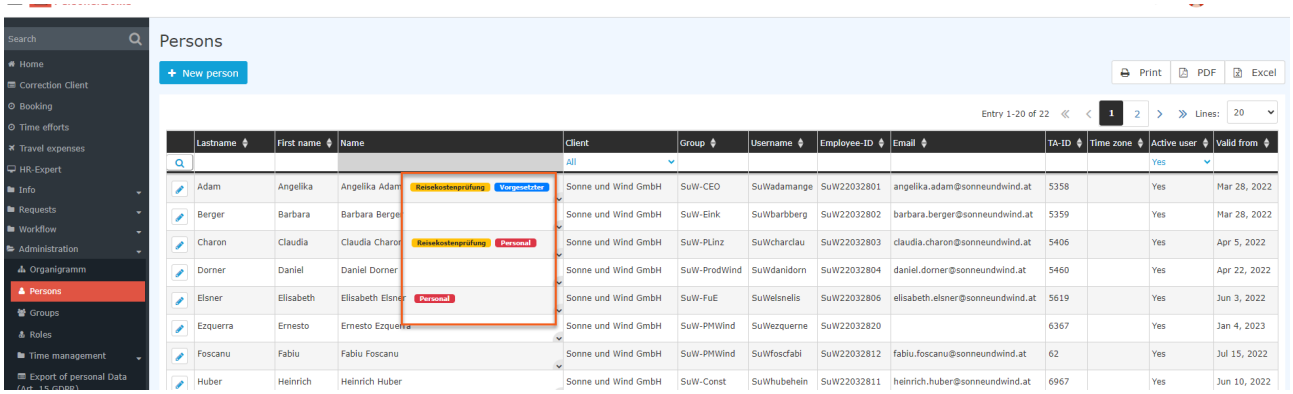


in the role holder overview. The competence target describes which person, group or client the role holder is responsible for. In addition, information on the selected validity period and the ranking can be seen here.

Additional information

Example 3 probably represents the most common use case (a person is to be assigned to a group as a role holder). 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 responsibility** (supervisor, HR, travel expense review) is also provided by the employee list (Administration/Persons): here, the employees to whom this applies are specially marked by a colored button, see the following image.



You can find more information on roles under Roles[3].

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