Organizational Unit Field Index

Field name	Field type	Description
Client	Text field	Mandatory field, already filled with the name of your organization, cannot be changed
Short name	Text field	Mandatory field, the short name consists of the prefix defined for your organization and an abbreviation for the organizational unit.
Name	Text field	Mandatory field, name of the organizational unit as it is commonly used in your company
Description	Text field	for further notes on the organizational unit
Top level	Checkbox	an organizational unit at the highest hierarchy level is marked with a check mark
Valid from	Date field	Mandatory field, with calendar
Valid until	Date field	with calendar, default value 01.01.3000

"Persons" tab
Employees are assigned to an organizational unit via the function Person -> Organization -> Groups. Employees assigned in this way appear in the list Organizational Unit -> Persons. Former employees of the organizational unit are listed under "Previous assignments".

"Budgeted Positions" tab
Attention: budgeted positions must be created via Organization/Budgeted Position or, in the quick menu, via the icon



in the left menu bar! This form is used to assign budgeted positions to organizational units!

Field name	Field type	Description
Budgeted position	Dropdown	with a list of all budgeted positions that have been created
Valid until	Date field	Mandatory field, with calendar

"Hierarchy" tab

The two sub-tabs "Parent groups" and "Child groups" are described together here

Field name	Field type	Description
Parent group or Child group	Dropdown	Selection from the list of created organizational units to place the organizational unit within the company structure
Valid until	Date field	with calendar

"Role" tab

Field name	Field type	Description
Role	Dropdown	with a selection list of the roles that have already been created
Client/Group/Person only one selection possible!	Dropdown	with a selection list
Valid from	Date field	with calendar
Valid until	Date field	with calendar, default value 01.01.3000
Order	Text field	Numeric entry that determines the position or the order of the substitutes

"In Competence Target of" tab
serves purely as an informational overview of the roles that have already been created and their holders. No input options are provided here.
Note
If required, it is possible to add further fields in the area "Organizational Units" to capture data specific to your company. Please contact our specialists and experts for this!