

# Creating a new group (Organigram/Loose group)

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In this chapter, you will find the following points:

- [Requirements for creating a group](#)<sup>1</sup>
- [Creating a new hierarchical group \(organigram group, organisational unit\)](#)<sup>2</sup>
- [Creating a loose group](#)<sup>3</sup>

## Requirements

*Before you create a new department / group / organisational unit, you should answer the following questions for yourself:*

- Into which **organisational structure** should the group be incorporated?
  - **Organigram:** hierarchical group (relationship of groups to each other (superior / subordinate groups); an employee can only be a member of one hierarchical group at a time).
  - **Loose Group:** no hierarchies between groups. Employees can be members of any number of loose groups at the same time
- **Organigram:** Which group should be superordinate to the newly created group? Which subordinate?
- **Loose Group:** Does the group (and thus all its members) have a specific function (**role**) in the company (staff, supervisor)?
  - **Yes: Which?** Staff or supervisor or both?

After answering these questions, you will have the minimum information needed to create a new group.

**Examples of hierarchical groups:** a new Purchasing department (PD) is to be subordinate to the Management (CEO) department; the new Purchasing department is to be the superior department of the Purchasing East (PDE) and Purchasing West (PDW) groups, etc. --> [Creating a hierarchical group](#)<sup>4</sup>

**Examples of Loose groups:** all female employees; all male employees; all apprentices; all departmental confidants, one human resources department; etc. --> [Creating a Loose group](#)<sup>5</sup>

### NOTIZ

If your organisational structure includes **locations** or **cost centres**, they are created in the same way as loose groups!

## Creating a new hierarchical group (organigram group, organisational unit)

Click on the menu item "**Groups**" in the menu tree under "**Administration**".

In the following list you will see an **overview of all Loose / hierarchical (organigram) groups** in the company. Click on "**New Group**".

Search

Groups

New group

Print PDF Excel

Entry 1-20 of 29

| Shortname | Name                          | Description                             | Auto-add new persons? | Client              | Orgstructure    | Valid from   | Valid till  |
|-----------|-------------------------------|---|-----------------------|---------------------|-----------------|--------------|-------------|
| SuW_Test  | Test                          |   | No                    | Sonne und Wind GmbH | Organigramm SuW | Jan 24, 2023 | Jan 1, 3000 |
| SuW-Akqu  | Aquisition                    |   | No                    | Sonne und Wind GmbH | Organigramm SuW | Jan 24, 2023 | Jan 1, 3000 |
| SuW-AUS   | Sonne und Wind Ex-Mitarbeiter |   | No                    | Sonne und Wind GmbH | Organigramm SuW | Jul 16, 2022 | Jan 1, 3000 |
| SuW-CEO   | Geschäftsleitung              |   | No                    | Sonne und Wind GmbH | Organigramm SuW | Mar 3, 2022  | Jan 1, 3000 |
| SuW-Const | Construction                  |   | No                    | Sonne und Wind GmbH | Organigramm SuW | Jan 2, 2023  | Jan 1, 3000 |
| SuW-Coop  | Co-operativ buildings         |   | No                    | Sonne und Wind GmbH | Organigramm SuW | Jun 19, 2023 | Jan 1, 3000 |
| SuW-Eink  | Einkauf                       |   | No                    | Sonne und Wind GmbH | Organigramm SuW | Mar 3, 2022  | Jan 1, 3000 |
| SuW-FF    | Finanzierung und Förderungen  | Finanzierungs- und Förderungsabwicklung | No                    | Sonne und Wind GmbH | Organigramm SuW | Jan 2, 2023  | Jan 1, 3000 |
| SuW-FuE   | Forschung und Entwicklung     |   | No                    | Sonne und Wind GmbH | Organigramm SuW | May 12, 2022 | Jan 1, 3000 |
| SuW-Gut   | Gewerbe und Industrie         | Kunden aus Gewerbe und Industrie        | No                    | Sonne und Wind GmbH | Organigramm SuW | Jan 2, 2023  | Jan 1, 3000 |
| SuW-Mark  | Marketing                     |   | No                    | Sonne und Wind GmbH | Organigramm SuW | Mar 29, 2022 | Jan 1, 3000 |

In the now shown input mask, the fields must be filled in as follows:

- **Client:** <your company>
- **Organisational structure** (only available after selecting the client): Organisational chart
- **Short name** (preset with the prefix =client abbreviation): e.g.: SuW-PBWien
- **Name** (long name of the group): e.g.: Planning Office Vienna
- **Description** (optional): e.g.:Plant Planning Location Vienna
- **Valid from/until:** Limitation possible, automatically preset with the current date or with 01.01.3000.
- **Add new person automatically:** Checkbox for automations

Group

Save Save & Close Back

Client: Sonne und Wind GmbH

Shortname: SuW-Fair

Name: Trade fair organisation

Description:

Orgstructure: Organigramm SuW

Group type: Orgunit

Valid from: 18.10.2023

Valid till: 01.01.3000

Automatically add new persons to this group:

Clicking on **Save** creates the group and additional tabs appear:

Group

Save Save & Close Back Delete Edit in HR-Expert Print

Client: Sonne und Wind GmbH

Shortname: SuW-Fair

Name: Trade fair organisation

Description:

Orgstructure: Organigramm SuW

Group type: Orgunit

Valid from: 18.10.2023

Valid till: 01.01.3000

Automatically add new persons to this group:

Top Level Group:

Parent Group Child groups Roles Persons Action Permissions In competence of roleholders Settings

with History:

+ New Parent Group

| Name | Valid from | Valid till |
|------|------------|------------|
|------|------------|------------|

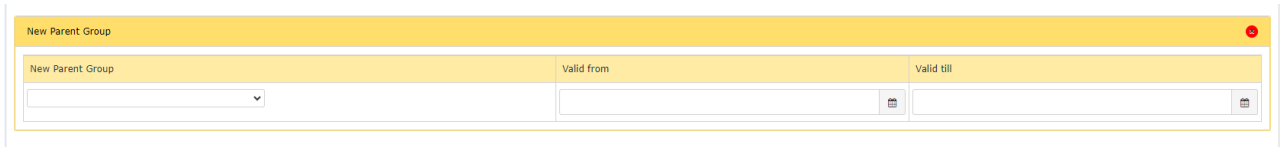
Relevant for daily use are the 3(4) tabs marked in red: Parent Group, (Child group), Roles, Persons.

WARNUNG

Attention: The checkmark for **Highest level** (ONLY for hierarchical groups!) must be set for **exactly one single created group**. This then represents the top group (root) in the organisation chart. All other groups are subordinate to it

## Parent Group

Since a new group has been created in the organigram, it must of course be inserted into the existing hierarchy. To do this, please click on the **"New Parent Group"** button in the **Parent Group tab**.



The drop-down list can be used to select the group that is to be above the group just created in the organisation chart. With **"Valid from"** and **"Valid to"**, the validity period of this assignment can optionally be defined. If nothing is filled in, the assignment is valid immediately and until further notice (01.01.3000). This feature is useful if, for example, a change in the organisation chart is imminent - this can be planned here at an early stage (e.g.: Valid from 01.09.) and is then automatically activated on the specified date.

Click on **"Save"** to apply the assignment.

## Child Group

Here, you can define the groups that are to be placed below the current group in the hierarchy of the company. Please note that the groups that are added in this tab are **automatically assigned to the current group as a parent group**. Normally, this tab is empty, and a parent group is only created under Parent Group, which automatically determines which groups are further down in the hierarchy.

## Roles

By clicking on Role Assignment, a role can be assigned to the group (Supervisor, Personnel). If, for example, the role Personnel is assigned, all members of this group are automatically assigned the role Personnel and are thus responsible for personnel matters for the company.

Click on the 3 horizontal dots to select the desired role (e.g. Personnel). Under **competence target**, you have the possibility to select a **person** or a **group** for which the current group is to perform the selected role.

**Example:** If one selects Personnel as the role and Person as the competence target, then the current group is responsible in personnel matters for the selected person XYZ. This means that all members of this group are responsible for personnel matters concerning person XYZ.

With **Valid from** and **Valid to**, a validity period for the role assignment can be defined. Clicking on Save saves the settings.

Roles can be edited or deleted by clicking on the corresponding icons.

## Persons

You can find out how to assign people to a group by clicking on the following link: *Add employees to a group [Link will be added soon]*

## Creating a new Loose group

NOTIZ

Note: the creation of new **cost centres** or **locations** is done in the same way as the creation of loose groups.

Click on the menu item **"Groups"** in the menu tree under **"Administration"**.

In the following list you will see an **overview of all loose / hierarchical (organigram) groups** in the company. Click on **"New Group"**.

| Shortname | Name                          | Description                             | Auto-add new persons? | Client              | Orgstructure    | Valid from   | Valid till  |
|-----------|-------------------------------|---|-----------------------|---------------------|-----------------|--------------|-------------|
| SuW_Test  | Test                          |   | No                    | Sonne und Wind GmbH | Organigramm SuW | Jan 24, 2023 | Jan 1, 3000 |
| SuW-Akqu  | Aquisition                    |   | No                    | Sonne und Wind GmbH | Organigramm SuW | Jan 24, 2023 | Jan 1, 3000 |
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| SuW-Const | Construction                  |   | No                    | Sonne und Wind GmbH | Organigramm SuW | Jan 2, 2023  | Jan 1, 3000 |
| SuW-Coop  | Co-operativ buildings         |   | No                    | Sonne und Wind GmbH | Organigramm SuW | Jun 19, 2023 | Jan 1, 3000 |
| SuW-Eink  | Einkauf                       |   | No                    | Sonne und Wind GmbH | Organigramm SuW | Mar 3, 2022  | Jan 1, 3000 |
| SuW-FF    | Finanzierung und Förderungen  | Finanzierungs- und Förderungsabwicklung | No                    | Sonne und Wind GmbH | Organigramm SuW | Jan 2, 2023  | Jan 1, 3000 |
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| SuW-Mark  | Marketing                     |   | No                    | Sonne und Wind GmbH | Organigramm SuW | Mar 29, 2022 | Jan 1, 3000 |

In the following input mask, the fields must be filled in as follows:

- **Client:** <your company>
- **Organisational structure** (only available after selecting the client): loose groupes
- **Short name** (preset with the prefix =client abbreviation): e.g.: SuW-PBWien
- **Name** (long name of the group): e.g.: Planning Office Vienna
- **Description** (optional): e.g.:Plant Planning Location Vienna
- **Valid from/until:** Limitation possible, automatically preset with the current date or with 01.01.3000.
- **Add new person automatically:** Checkbox for automations

WARNUNG

It makes sense to activate the checkbox **"Automatically add new person"** for the **XXX-ALL** group (for all employees), because every new employee **MUST** be a member of the **XXX-ALL** group in order to be able to use the system at all. Of course, this also applies to other groups specific to your company, for which all employees should automatically be members.

WARNUNG

If you also use other Personalwolke modules, such as Project Time or Travel, it makes sense to activate the automatic addition to the respective basic user group.

Group

Save Save & Close Back

Client: Sonne und Wind GmbH

Orgstructure: Lose Gruppen SuW

Shortname: SuW-Assist

Name: All Assistants

Description:

Valid from: 18.10.2023

Valid till: 01.01.3000

Automatically add new persons to this group

Clicking on **Save** creates the group and additional tabs appear:

NOTIZ

Parent and child groups do not exist in loose groups, as they are not embedded in an organisational chart.

Group

Save Save & Close Back Delete

Client Sonne und Wind GmbH

Shortname SuW-Assist

Name All Assistants

Description

Automatically add new persons to this group

Orgstructure Lose Gruppen SuW

Group type Lose Gruppe

Valid from 18.10.2023

Valid till 01.01.3000

Roles Persons Action Permissions In competence of roleholders Settings

with History

+ New Role Assignment

| Name | Competence target | Valid from | Valid till | Ranking | Delete / Edit |
|------|-------------------|------------|------------|---------|---------------|
|------|-------------------|------------|------------|---------|---------------|

Group "SuW-Assist" has been saved successfully!

Menu and Permission Cache have been deleted successfully!

For daily use, the two tabs Roles and People are particularly relevant here.

### Roles

By clicking on "**New Role Holder**", a role can be assigned to the group as a whole (Supervisor, Personnel). For example, if the role Personnel is assigned, all members of this group are automatically assigned the role Personnel and are thus responsible for personnel matters for the company. This also applies automatically to each new employee assigned to this group.

### Persons

You can find out how to assign people to a group by clicking on the following link: *Add employees to a group* [Link will be added soon]

#### NOTIZ

Note: If the structure of your organisation also includes **cost centres** and **locations**, they can be created in the same way by selecting them from the drop-down list in the "**Organisation structure**" field.