

Groups - Masterdata of a group

General

In the following, the mask for a group (organisational unit=hierarchical group, loose group, location, cost centre) is described.

You will find information on the following parts of the mask:

- [Header](#)¹
- [Parent Group](#)²
- [Child groups](#)³
- [Roles](#)⁴
- [Persons](#)⁵
- [Action permissions](#)⁶
- [In competence of roleholders](#)⁷
- [Settings](#)⁸

The screenshot shows the 'Group' masterdata form. The header section includes fields for Client (Sonne und Wind GmbH), Shortname (SuW-Const), Name (Construction), and Description. It also has Orgstructure (Organigramm SuW), Group type (Organisationseinheit), Valid from (02.01.2023), and Valid till (01.01.3000). Below the header is a tabbed interface with tabs for Parent Group, Child groups, Roles, Persons, Action Permissions, In competence of roleholders, and Settings. The Parent Group tab is active, showing a 'with History' checkbox and a 'New Parent Group' button. At the bottom, there is a table with columns Name, Valid from, and Valid till. The table contains one entry: SuW-CEO (Geschäftsführung) with Valid from 05.01.2023 and Valid till 01.01.3000.

Name	Valid from	Valid till
SuW-CEO (Geschäftsführung)	05.01.2023	01.01.3000

Header

This screenshot shows the header section of the 'Group' masterdata form. It includes the same fields as the previous screenshot: Client (Sonne und Wind GmbH), Shortname (SuW-Const), Name (Construction), Description, Orgstructure (Organigramm SuW), Group type (Organisationseinheit), Valid from (02.01.2023), and Valid till (01.01.3000). The 'Automatically add new persons to this group' checkbox is also visible.

- **Client:** organisation name
- **Shortname:** prefix + name abbreviation
- **Name:** written out group name
- **Description:** for a more detailed explanation of the group
- **Orgstructure:** refers to the type of group (organisational chart=hierarchical group, loose group, location, cost centre) - cannot be changed!
- **Group type:** automatically filled in after selecting "Orgstructure"

- **Valid from/till:** from the date the group was created or its validity start date to the expiry date.
- **Add new person automatically:** only useful for loose groups!

Changing the group name is also described under "*Change short name/group name*" [*Link will follow soon*].

Parent Group

Name	Valid from	Valid till
SuW-CEO (Geschäftsleitung)	05.01.2023	01.01.3000

This tab is only visible for hierarchical groups (organigram groups, organisational units).

The organisational unit to which the group is subordinate is indicated here.

Each organisational unit, except for of the highest ("management") and the group of ex-employees, must have a superordinate group.

A change in the assignment to a superordinate group is described under "*How to create a group*" or under "*Change department/group hierarchy*". [*Links will follow soon*]

Child Groups

Name	Valid from	Valid till	#	Delete / Edit
SuW-Coop (Co-operativ buildings)	02.10.2023	01.01.3000	0	[Delete] [Edit]
SuW-MontWind (Montage Windkraft)	25.01.2023	01.01.3000	0	[Delete] [Edit]
SuW-MontSol (Montage Solar)	25.01.2023	01.01.3000	1	[Delete] [Edit]

This tab is only visible for hierarchical groups (organigram groups, organisational units).

Whether an organisational unit has (a) subgroup(s) can be seen from the organigram.

It is also possible to enter several subordinate groups for one group.

A change in the assignment to a subordinate group is described in the chapters "*How to create a group*" or "*Change department/group hierarchy*".⁹ [*links will be added soon*]

Roles

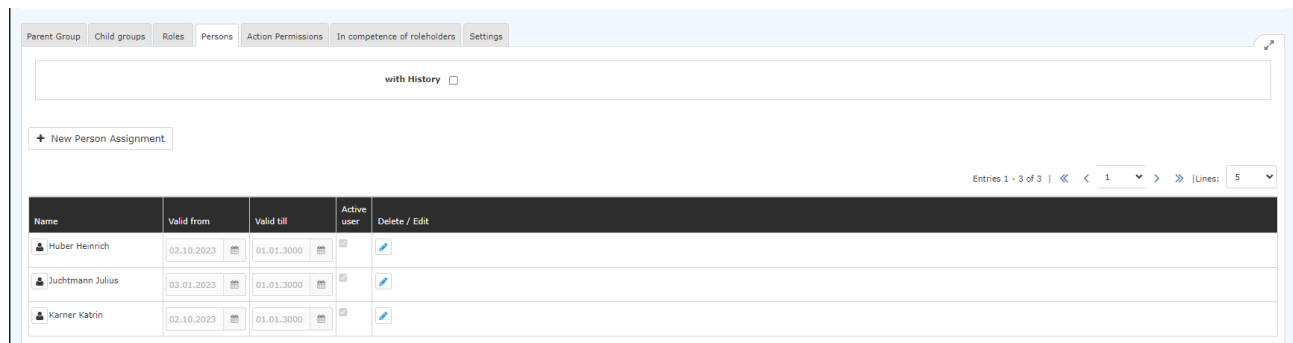
Name	Competence target	Valid from	Valid till	Ranking	Delete / Edit
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A group can, but does not have to, have roles.

But as soon as a role has been assigned to a group, every member of this group also automatically has this role (= "inherits" it from the group)!

The assignment of roles to a group is described under "*Creating and editing role assignments*" in the subchapter "*About the group that is to receive the role*". [Links will be added soon]

Persons



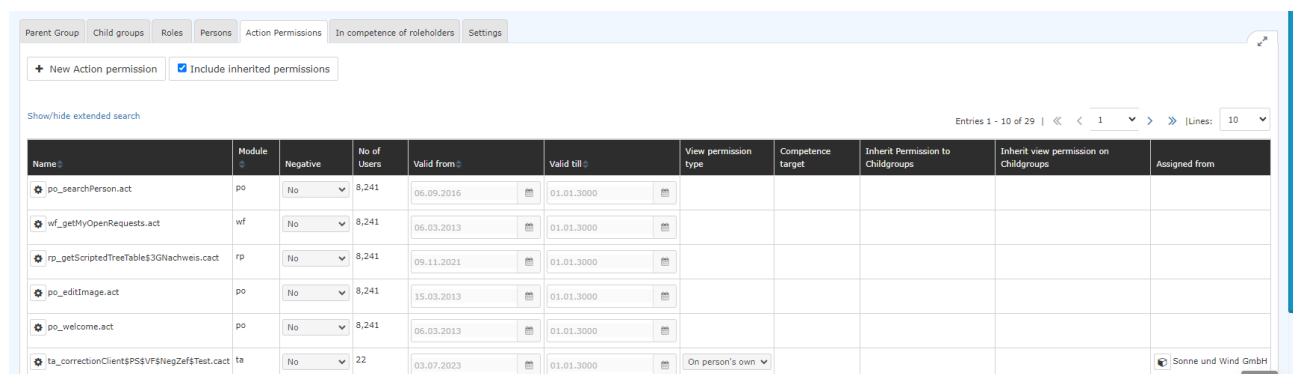
Name	Valid from	Valid till	Active user	Delete / Edit
Huber Heinrich	02.10.2023	01.01.3000		
Juchtmann Julius	03.01.2023	01.01.3000		
Karner Katrin	02.10.2023	01.01.3000		

In this case, persons are all employees who have been assigned to this group.

The assignment of staff members to a group is done via the instructions according to "*Add staff member to a group*" or via the organisation chart via "*Move employees to another department/group*"¹⁰ (only possible for hierarchical groups, not for loose groups!).

Assignment to a group directly via the employee's profile is also possible, see "*New person*" / "*Groups*" tab. [Link will be added soon]

Action permissions



Name :	Module	Negative	No of Users	Valid from :	Valid till :	View permission type	Competence target	Inherit Permission to Childgroups	Inherit view permission on Childgroups	Assigned from
po_searchPerson.act	po	No	8,241	06.09.2016	01.01.3000					
wf_getMyOpenRequests.act	wf	No	8,241	06.03.2013	01.01.3000					
rp_getScriptedTreeTables\$3G\$achweis.cact	rp	No	8,241	09.11.2021	01.01.3000					
po_editImage.act	po	No	8,241	15.03.2013	01.01.3000					
po_welcome.act	po	No	8,241	06.03.2013	01.01.3000					
ta_correctionClient\$PS\$VF\$NegZef\$Test.cact	ta	No	22	03.07.2023	01.01.3000	On person's own				Sonne und Wind GmbH

This tab informs about the permissions for actions that the members of this group or the employees of this organisational unit have.

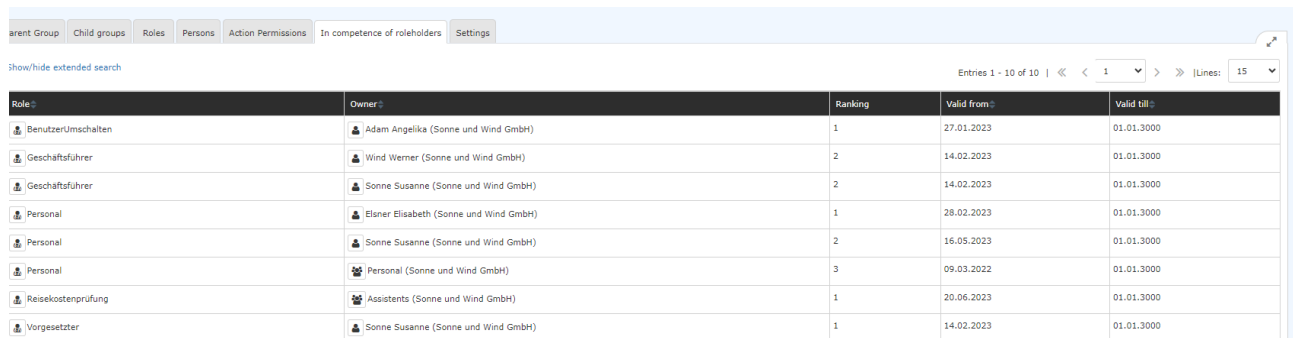
Basically, this tab is for information only, changes are not possible.

The action permissions shown here are relevant above all in communication with the system administrators.

The data listed in the table refers to the action permissions themselves, such as the number of users and the validity. This data is not related to your company.

"Include inherited action authorisations": here it is possible to select those authorisations that the group has only received through belonging to a superordinate group or through the client (=inherited action authorisations).

In competence of roleholders

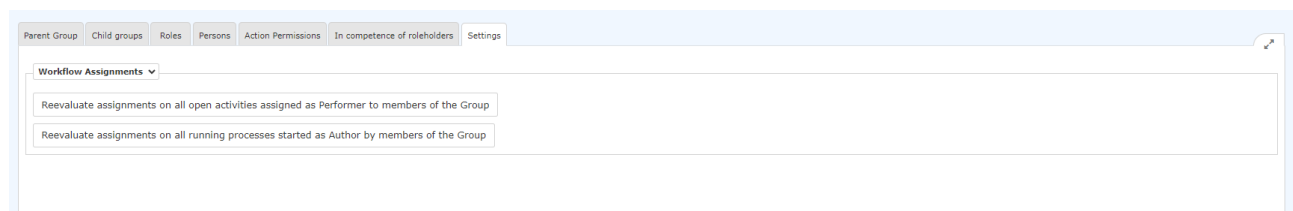


Role	Owner	Ranking	Valid from	Valid till
Benutzerumschalten	Adam Angelika (Sonne und Wind GmbH)	1	27.01.2023	01.01.3000
Geschäftsführer	Wind Werner (Sonne und Wind GmbH)	2	14.02.2023	01.01.3000
Geschäftsführer	Sonne Susanne (Sonne und Wind GmbH)	2	14.02.2023	01.01.3000
Personal	Elaner Elisabeth (Sonne und Wind GmbH)	1	28.02.2023	01.01.3000
Personal	Sonne Susanne (Sonne und Wind GmbH)	2	16.05.2023	01.01.3000
Personal	Personal (Sonne und Wind GmbH)	3	09.03.2022	01.01.3000
Reisekostenprüfung	Assistants (Sonne und Wind GmbH)	1	20.06.2023	01.01.3000
Vorgesetzter	Sonne Susanne (Sonne und Wind GmbH)	1	14.02.2023	01.01.3000

This tab shows which role holders have responsibility for this group or its members/employees, i.e. in the area of competence of which role holders this group lies.

For example, it lists who is responsible for the personnel administration of this group or who is responsible as a supervisor.

Settings



Workflow Assignments

Reevaluate assignments on all open activities assigned as Performer to members of the Group

Reevaluate assignments on all running processes started as Author by members of the Group

In the group's master data, there is a standardised setting: "Workflow Assignments".

This contains the following functions, which are activated by clicking on the respective buttons.

- **"Reevaluate assignments on all open activities assigned as Performer to members of the Group"**

Due to role changes, transfers of employees, etc., it may become necessary to update assigned activities. Click this button to start the reassignment. This will be implemented immediately.

- **"Reevaluate assignments on all running processes started as Author by members of the Group"**

This concerns the reverse direction: if the starters of such activities have changed due to changes in roles and groups, an update can be carried out by clicking on this button.

1. </daisy/webdesk-manual-admin/6468-dsy.html?language=4>
2. </daisy/webdesk-manual-admin/6466-dsy.html?language=4>