Groups

General

The **groups** of a company make it possible to combine employees into different units. These groups are used to model organizational and cost accounting aspects, e.g.:

- Organizational units (e.g. department, team, division, staff unit, ...)
- Cost centers
- Project groups and loose groups

The assignment of the group to the organizational structure indicates whether the group is a hierarchical organizational unit (see hierarchical organization!), a project group, a cost center or a loose group.

A group is defined by at least the following properties:

- unique short name (must be unique throughout the entire system!)
- Name
- Assignment to a client
- Assignment to the organizational structure of the client

Groups that belong to a hierarchical organizational structure have the following additional properties:

- The group has a superordinate group (the organizational unit is "subordinate" to another organizational unit).
- The group can have subordinate groups (the organizational unit has subordinate organizational units)
- An employee can be assigned to ONLY ONE organizational unit at a time.

If the group is part of a hierarchical organization, additional **relationship options** to other groups are available: These relationships are regulated, for example, by specifying a "top-level group in the structure" or a superordinate or subordinate group.
If a superordinate group is selected, all other groups appear in the organizational chart as subordinate to this group. A superordinate group can have several subgroups beneath it.

Groups that model a **cost center structure** usually have no relationships to each other (i.e. no parent/child relationships as with hierarchical organizational units). It can be configured whether an employee can belong to only one cost center at a time.

Members of groups are persons. For hierarchical groups, a person must be assigned to exactly ONE group at a time. A new assignment of a person to a hierarchical group causes this person to lose membership in their previous hierarchical group.
If the group is a loose group or a project group, persons can be members of several such groups at the same time!

The **assignment of employees** to a group can be planned in advance by specifying the validity date of the respective employee in a group (temporary or permanent group assignment). For example, it can be planned that an employee who is assigned to group A is to be assigned to another group (group B) as of a certain date (valid from - to).
A person's membership in a group is always stored with history. This means that a person can join such a group or "leave" it again as of a certain date. This membership can then be correctly taken into account historically in evaluations. Groups can furthermore receive action permissions and become holders of roles.

Groups Menu Item - Overview

- The **overview** contains the short name, name, an optional description, client assignment, organizational structure and the validity period of a group.
- The groups are ordered depending on which column was used for sorting.

Searching for a Group

- Search by name, short name, description or client
- Click the search icon (magnifier)
- Depending on the search criteria, the group you are looking for or a corresponding selection is then displayed.

Creating a New Group

New groups are usually created in **Time & Attendance** and then **synchronized** into Webdesk.
If you want to create a new group of your own in Webdesk > **New group**:

- fill in the corresponding fields with short name, name and description of the group, select the client and the organizational structure (organizational chart, loose group, cost center...)
- All fields marked with an asterisk must be filled in
- "Save & Close" to return to the overview of all groups or "Save" if you want to continue editing the form.
- This action can also be interrupted at any time with the "Back" button.

After saving, you receive the confirmation from the server. You are taken automatically to the **tabs**: superordinate group, subgroups, roles, persons, action permissions, in the scope of competence of this role.

- **Checkbox "Highest level"**
  Here you can define whether the group is displayed as the highest group in the organizational chart. It is also possible to specify several groups that have been defined as "Highest level". Groups at the highest level have no superordinate groups.
- **Superordinate group**
  On this tab you can specify a superordinate group together with its validity period. If you do not want a superordinate group, select the empty entry in the selection list (dropdown field)
  with history > this parameter allows the display of historical records

- **Subgroups**
  Analogous to a superordinate group, subgroups and their validity period can be specified here.
  A specific **order** can be defined for the subgroups, according to which they then appear in the organizational chart.
  The order is determined with the arrow symbols and shown in the "Ranking" field. Don't forget to save.
  with history > this parameter allows the display of historical records

Assigning Roles to Groups

With this tab, certain role functions can be assigned to the newly created group (e.g. role Colleague).
Roles make it possible to allow or restrict access to certain areas and functions > this is controlled via the parameter competence target (All, Person, Group).
You select the role from the predefined selection, likewise a competence target for this role, the validity period using the calendar function, and optionally specify the ranking.

- **Persons**
  Here specific persons are assigned to the group, using the predefined selection of all employees of the client.

Assigning Action Permissions to Groups

Action permissions can be assigned to the respective groups, as can certain roles. All employees of this group then have this action permission or are holders of the assigned role(s).

Further configuration options:

- **Validity period**
  Period in which the action permission is to apply.
- **View permission**
  The parameter determines who may be viewed: own person, org unit / + subordinate, specific, own client, all clients.
- **Inherit permission to subordinate groups Yes / No**
  If the parameter is set to Yes, the subordinate groups also receive this action permission. If the parameter is set to No, the action permission is limited to this one group.

  - **New action permission**
    This parameter allows a new action permission to be assigned (or several action permissions).
  - **Valid from - to**
    Definition of the validity period
  - **View permission**
    Definition of the view permission for:
    - **Own person**: view permission applies only to the own person
    - **Org unit**: view permission for the own department
    - **Org unit and subordinate**: view permission for the own department and all departments subordinate to it
    - **Specific**: view permission for several mutually independent groups
    - **Own client**: view permission for all persons of the own client
    - **All clients**: view permission for all persons of all clients

Scope of Competence

The tab "In the scope of competence of this role" gives an overview of the role assignments and responsibilities for the selected group.

Here you can search for specific **roles** or **role holders**:

Assigning Persons to a Group

- Groups menu item > overview of all groups.
- Click the edit icon for the desired group > detail view.
- Here you select the Persons tab > click **New person assignment** > this adds a new person to the group.
- You can also plan the assignment of employees to a group in advance by specifying the validity date of the respective employee's group membership. For example, it can be planned that an employee who is assigned to group A is to be assigned to another group as of a certain date (**valid from - to**).
- **with history**
  This parameter allows the display of historical records

Removing Persons from a Group

- Groups menu item > click the corresponding group > overview of all persons who belong to this group.
- To remove a person from the group, click the Delete / Edit button located to the right of the name > the person is removed from the overview
- "Save" or "Save & Close".

Deleting a Group

A group can be deleted only if it has no subgroups. You can check this by selecting the corresponding group from the overview, then clicking the Subgroups tab. If subgroups exist, the group cannot be deleted. The Delete button is not displayed either. In this case, the best approach is as follows:

- first delete the subgroup
- then the group can be deleted

If there are no subgroups, the Delete button is displayed automatically.

- Click the Delete button
- Saving deletes the group; it no longer appears in the groups overview.

Synchronization of Groups from the Time & Attendance System

If a Time & Attendance system is used in the company, the group data is usually imported from it. For this, **connectors** are used, which perform a **synchronization** or reconciliation between a backend system (e.g. Time & Attendance or payroll system) and Webdesk.

The data is synchronized automatically with the help of a dedicated job. If the group data in the backend system changes, the changes are reconciled (depending on the job configuration) with the existing group data in Webdesk and adjusted if necessary.
After the reconciliation, all groups from the Time & Attendance system should also be found in Webdesk.

For more details, see the menu item **Connectors** and the menu item **Jobs** as well as the **training materials** in the chapter "Setting up synchronization".