Group management

General information

A **group** allows several people to be **combined** into **organisational units**. These can serve various grouping purposes in the context of the employee portal, for example:

- Department
- Team
- Division
- Staff unit
- Project group
- Costcentre
- etc....

Each group must be assigned to an **organisational structure** - this **assignment** indicates whether the group is a hierarchical orgnisational unit[1] (see hierarchical organisational structure), a project group, a cost centre, a loose group, a location or a payroll area.

A group is defined by at least the following **properties**:

- Unique short name (must be unique throughout the system)
- Name
- Assignment to client
- Assignment to an organisational structure of the client

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> **Action permissions & roles**
> It is possible to *assign* certain **action permissions** or **roles** to groups. All persons in this group then have the corresponding action permission or are the holder of the assigned role(s).

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Group hierarchy

Hierarchical groups

If the group is part of a **hierarchical organisational structure**, *additional relationship options* to other groups are available: These relationships to each other are regulated, for example, by designating a **"top group"** in the structure or a *parent* or *subordinate* group.

If a parent group is selected, all other groups appear subordinate to this group in the organisation chart. A parent group can have several subgroups below it.

Non-hierarchical groups

Non-hierarchical groups are groups without a **systematic organisational purpose**, i.e. these groups have no hierarchical relationships with each other. These can be loose groups, project groups or cost centres, which allow employees to be grouped according to various criteria (e.g. full-time employees, part-time employees, flat-rate employees, resignations, leaves of absence, projects, etc.). Depending on the organisational structure to which they belong, employees can be assigned to several loose groups or only to one group at a time.

Group membership and change of group

Members of groups are always persons. In **hierarchical groups**, a person must be assigned to exactly **ONE group** at any one time. Assigning a person to a hierarchical group means that this person loses their membership of their previous hierarchical group.
If the group is one of the other **organisation types**, it is possible for people to be a **member of several such groups at the same time**, depending on their settings.

When **assigning people to groups**, a desired **start and end date** can also be specified. For example, it can be planned that an employee who is assigned to group A is to be assigned to another group (group B, valid from) from a certain date (valid from - to).

Importing groups

If an **external HR system** or **people directory** is used in the company, group data can be imported from it. Separate jobs with connectors are used for this purpose. In practice, however, Webdesk EWP is the leading system for creating and managing groups, so this procedure is rarely used.

Further information on this topic can be found under "System settings" --> Connectors/Jobs.

Felder

Name	Wert
Modul	Portal & Organisation (po)
Webdesk Actionname	po_showGroups.act
Artefakt-Typ	Action

1. /daisy/webdesk-manual-en/admin/po-overview/3065-dsy/2634-dsy.html