Organizational management

General Information

Organizational management is used to map all the **key organizational elements** of a company in the context of the employee portal.
Subsequently, **functions** of the employee portal are assigned to these organizational elements. These functions are in turn used as the basis for querying employee-related data. This data can usually be evaluated grouped by department, team or cost center.

The following **organizational elements** can be defined in Webdesk EWP:

Client[1]	**Organisation structure**[2]

Group[3]	**Person**[4]	**Role**[5]

Organizational elements

NOTIZ

To be able to work with Webdesk EWP, at least **one client** and **one organizational structure** are required.

Mandanten

The essence of the client is to achieve a relatively **strict separation** from the functions, information and processes of OTHER clients. The client is the **highest-level organizational element** and usually refers to the company itself. Further details can be found on the following pages, in particular in the client administration[6].

Organizational structure

The organizational structures of a client allow the groups to be **categorized** differently. For each client, it is **mandatory** to define at least one **hierarchical (organizational) structure** for the client. Organizational structures can be of the following types:

- Hierarchical organizational structure (mandatory!)
- Cost centers
- Project groups
- Loose groups
- Locations
- Accounting areas

Since a person must be assigned to a hierarchical organizational unit (group) and this in turn must belong to a hierarchical organizational structure, at least **one client and a hierarchical organizational structure** have to exist.

Groups

The **groups** of a company allow employees to be grouped into different units. These groups are used to map **organizational and cost accounting aspects**, e.g:

- Organizational units within the hierarchical organizational structure (departments Sales, Management, HR, Controlling, etc...)
- Cost centers

- Project groups
- Usage as a loose group (e.g. all company car users)Organisationseinheiten innerhalb der hierarchischen Aufbauorganisation (Abteilungen Sales, Management, HR, Controlling, etc...)

A person's membership of a group is always stored **historically**. This means that a person can join or "leave" such a group on a specific date. This group membership can also be taken into account historically in reports. Groups can also receive **action permissions** and become **role holders**.

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

- The group has a **parent group** (organisational unit is "subordinate" to another organisational unit).
- The group can have **several child groups** (organisational unit has subordinate organisational units).
- An employee can ONLY be assigned to **ONE organisational unit** at any one time.

Groups that represent a cost centre structure usually have no relationships to each other (i.e. no parent-child relationships as with hierarchical organisational units). You can set whether an employee can only belong to one cost centre at a time.

Persons

The person is the actual **central organisational element** in the master data management of the "Portal & Organisation" module, i.e. the individual **"employee"**. Users of Webdesk EWP are always **persons** and often information about persons is also reported using the functions of the Webdesk. It remains unclear whether the person is actually an employee of the company or just an external user who uses the employee portal.

Role

Roles in Webdesk EWP represent **system-relevant functions** that can be assigned to an **employee** or a **group**. In contrast to a loose group, a **competence area** can always be specified in addition, which defines which groups/persons/clients can be controlled/displayed/processed with the **role function**.

The classic use case for this is the "**manager-employee relationship**" in the organisational structure of a company. (e.g. supervisor with the role "Manager" has the authorisation to view time records of his employees).
In addition, associations can also be defined, e.g. of clerks who are responsible for certain parts of the company (e.g. HR clerks who answer questions about payroll accounting for a certain part of the company).

Organisation chart

The organisational chart or the hierarchical organisational structure is a **key structuring element** in the Webdesk employee portal. The organisation chart visualises the defined hierarchical organisational structure. The allocation of **permissions** and **competences** is based on this organisation chart in many areas.

1. /daisy/webdesk-manual-en/admin/po-overview/3065-dsy/2632-dsy.html
2. /daisy/webdesk-manual-en/admin/po-overview/3065-dsy/2634-dsy.html
3. /daisy/webdesk-manual-en/admin/po-overview/3065-dsy/2635-dsy.html
4. /daisy/webdesk-manual-en/admin/po-overview/3065-dsy/2636-dsy.html
5. /daisy/webdesk-manual-en/admin/po-overview/3065-dsy/2640-dsy.html
6. /daisy/webdesk-manual-en/admin/po-overview/3065-dsy/2632-dsy.html