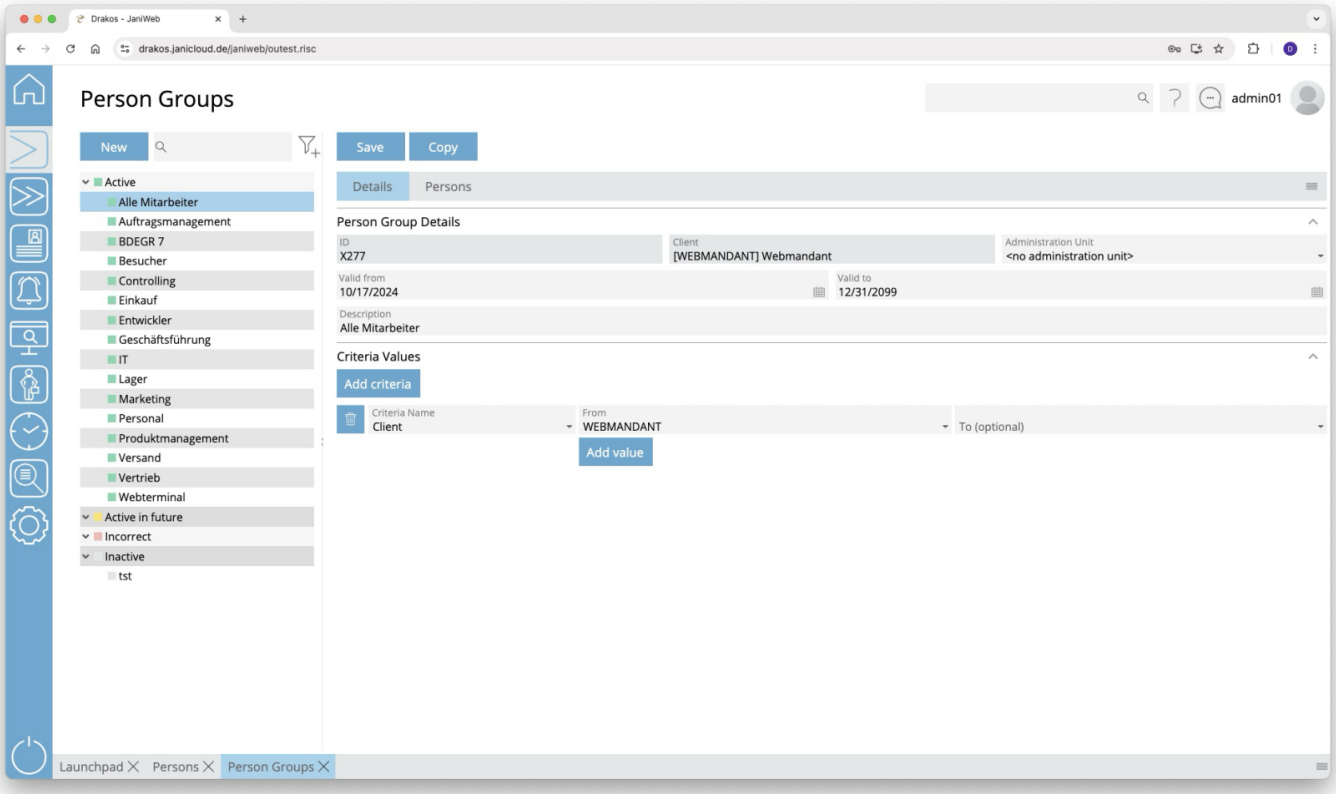
Person Groups

You can use the menu item *Person Groups* to group staff according to departments or other criteria.



List of person groups

The list contains all person groups already created, grouped by their status. Select a person group to view details.

The list offers the following options:

- **Search:** Enter text or numbers in the search field (magnifying glass icon) at the top to search for groups. The entries take effect immediately: the list only displays hits. The search is not case sensitive.
- **Filter:** Press the filter icon. Select the criteria for which you want to display groups. Changes are visible immediately.

Button *New*

Press *New* to create a new person group. Enter a description, a validity period, and a client, and press *Save*.

Tab *Definition*

Area *Person Group Details*

Define the details of the person group, such as the label and validity period.

Area *Criteria Values*

Specify the criteria according to which the person group is formed. To add a new criterion:

1. Press *Add criteria*.
2. Select the required criterion from the list field.
3. Enter a single value (*From*) or a range of values (*From–To*).
4. To set additional values for the same criterion, press *Add value*.

Logic of criteria and values

- The values within the same criterion are linked logically by OR (one match is sufficient).
- Different criteria are linked logically by AND (all criteria must be met).

Tab *Persons*

The list displayed here contains all persons who belong to the selected person group. Persons in this list have either been assigned automatically based on criteria or added manually.

- Press *Add* to add a person to the group independently of their criteria.
- Use the trash icon to remove a person from the group independently of their criteria.

Furthermore, the list offers the following options:

- **Select columns to display:** Press the gear icon. Select which columns you want to display and in which order. Arrange the columns using the mouse or the arrow icons. Press *Apply* to adopt the changes.

- **Search in columns:** Enter text or numbers in the search field (magnifying glass icon) of a column to search for names, personnel numbers, or other criteria. The entries take effect immediately: the list only displays hits.
  Tip: Search for substrings. You can find “Spencer-Churchill” with “spe”, “chur” or “hill”. The search is not case sensitive.
- **Export the entire list:** Press the download icon. Select the format in which you want to export the list. The export files are downloaded or displayed depending on the browser/operating system settings. For details on the available export formats, see the General > Export Formats chapter of this manual.

TIPS

Press *Copy* at the top to create a copy of the selected persons group, including their properties.

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