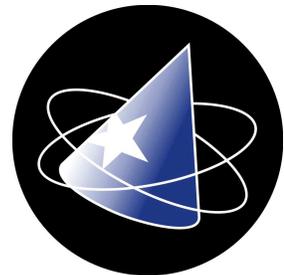# How To Guide...

Archiving

Wiztec Business Suite
& WizHR 5

Archiving

Introduction

Prior to archiving employees, an archive database must be created and set as the archive database. If you attempt to archive an employee when an archive database has not been set, the employee will remain in the original database.

Only one database can be selected as the Archive database, for the purposes of using the archiving functionality. In cases where companies have two or more archive databases, it is recommended that no database be selected as the archive and that the transfer function be used to archive employees (eliminate accidentally archiving an employee to an incorrect archive database)

1. Setting the Archive Database

1.1 Creating an Archive Database

Proceed to step 2, if you have already created an archive database.
If you are not sure if an archive database has been created, click on File and Open database. A list of databases appears in the Open dialog box. If an archive/historical database exists, proceed to step 2 below

1. Click on **File** (menu)
2. Click on **New Database**
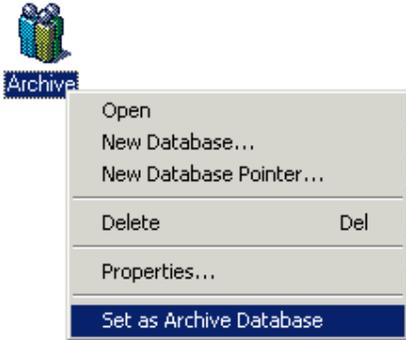3. The following dialog box appears: -

4. Key in the **Name** for the database (*in this case, Archive*)
5. Key in a **Description** for the database (*in this case, Archive Database*)
6. Click on **Save**
7. Wait a few moments while the new database is created

1.2 Setting the Archive Database

Note:
In order to proceed you must be an administrator of WBS

1. If the open database dialog box is not already open, click on **File** (*menu bar*), click on **Open Database**
2. Right click on the archive database
3. Select **Set as Archive Database**

4. The following message appears: -

5. Click on **Yes**
6. At the top of the Database dialog box, the **Current Archive Database** should be set to Archive (*or the relevant name of your chosen archive database*)

7. **Cancel** out of the Open Database dialog box when finished

2. Archiving Employees

It is strongly recommended that you edit the employees record before proceeding with the archive and give the employee a **Date of Leaving**. Whether the Date of Leaving is included or not, it will not impact of the archiving process, however, it is recommended for reporting purposes.

2.1 Archiving a single employee

1. On the **Employee Details** screen, navigate to the employee who you are archiving (*e.g. a leaver*)
2. Click on the **Archive** button (*program toolbar*)
3. The following screen appears: -

    Transfer Records

    Select Records to transfer:

    ◉ Current Record

    ○ All Records

    ○ Group

    ✓ OK
    ✗ Cancel
    ? Help

4. Click on **Current Record** (*if not already selected*)
5. Click on **OK**
6. The following message appears: -

    Records Transfer

    ? Are you sure you want to continue?

    Yes   No

7. Click on **Yes**
8. Wait a few moments while the archiving procedure completes

    Transferring Records

    Transferring Record 50006

    Transferring TEMPIND Records

    ☐ Stop Transfer at next Record

2.2 Archiving a group of employees

1. Create a group of employees, who are leaving (*use the employees date of leaving to filter the records – see section 3 below*)

2. Click on the **Archive** button (*program toolbar*)

3. The following screen appears: -

4. Click on **Group** (*if not already selected*)

5. Select a group from the drop down list

6. Click on **OK**

7. The following message appears: -

8. Click on **Yes**

9. Wait a few moments while the archiving procedure completes

3. Creating a group of employees to archive

If there are a number of employees to be archived, it is recommended that you create a group of employees. However, ensure that you have first edited each employees record and have given them a date of leaving. The date of leaving field is located in the Dates tab in the Master Details (Employee Details) screen.
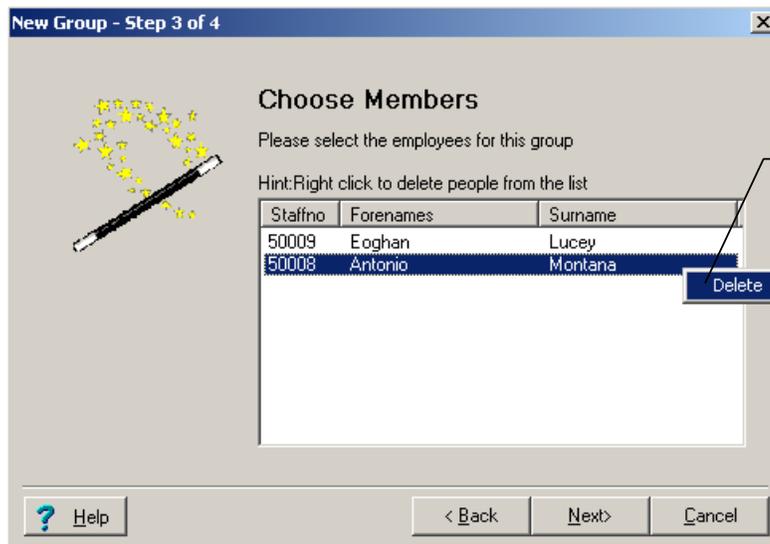
1. Click on **View** (menu bar)
2. Click on **Maintain Groups**
3. Click on **New Group**
4. The new group wizard appears, click on **Next**
5. Select the **Filter by** radio button
6. Click on the **Filter Option** button
7. Select **Alphabetic** under the **Field Order** options
8. Select **Date of Leaving** from the **Fields** list
9. Key in the earliest date that an employee may have left on in the **Starting Range** field
10. Key in the latest date that an employee may have left on in the **Ending Range** field

2

Select **Date of Leaving** from the fields list

3

Key in a Start Date and an End Date. i.e. the dates within which employees left the company

1

Select **Alphabetic** from the Field Order List

11. Click on **OK**
12. This will bring you back to the **Selection** dialog box
13. Click on **Next**

New Group - Step 3 of 4

Choose Members

Please select the employees for this group

Hint:Right click to delete people from the list

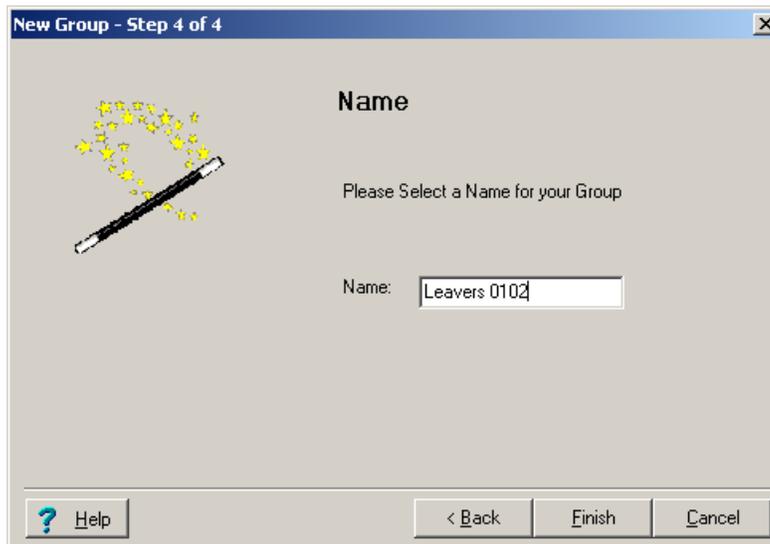| Staffno	Forenames	Surname
50009	Eoghan	Lucey
50008	Antonio	Montana

Delete

You have the option at this point to remove employees from the group.

Right click on the employee name and select delete.

This will delete an employee from the group and not delete them from the database

? Help   < Back   Next>   Cancel

14. A dialog box appears with a list of employees who match the criteria specified in the **Filter dialog** box

15. Click on **Next**

16. Key in a name for the group

New Group - Step 4 of 4

Name

Please Select a Name for your Group

Name: Leavers 0102

? Help   < Back   Finish   Cancel

17. Click on **Finish**

18. This will bring you back to the **Maintain Groups** screen

19. Click on **OK**

20. You are now ready to archive this group of employees (see section 2.2 above)