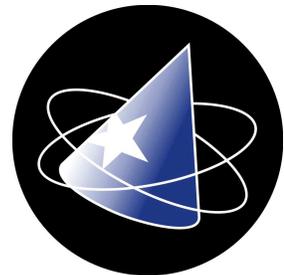


How To Guide...

Groups

Wiztec Business Suite & WizHR 5



Groups



Introduction

WBS allow you to organise employee records into distinct groups within a database. Grouping employees allows you to work faster and more efficiently with the database

For instance, you may have 300 employees in your current database but you only need to work with 10 of these employees. By creating a group for these employees you exclude the extra 290 employees, making it easier to navigate between relevant employee records on all sub screens.

Below are examples of instances where it may be necessary to create a group:-

- Sending a mail merge letter to a group of employees
- Archiving or transferring a number of employees
- Globally updating employee records (e.g. allocating a bank holiday to a group of employees in the Holiday & Absence screen)

Employees can be a member of more than one group. For instance, one employee may be a member of the New Starts group and the Social Club group.

Topics

The topics covered in this 'How To Guide' are: -

- Filtering a database from a pre-defined group (1.1)
- Showing all employees (1.2)
- Viewing the groups an employee is a member of (1.3)
- Deleting Groups (1.4)
- Modifying an existing group (1.5)
- Creating a new group (2.1)
- Using Groups in Reports (3.1)

Additional Notes:

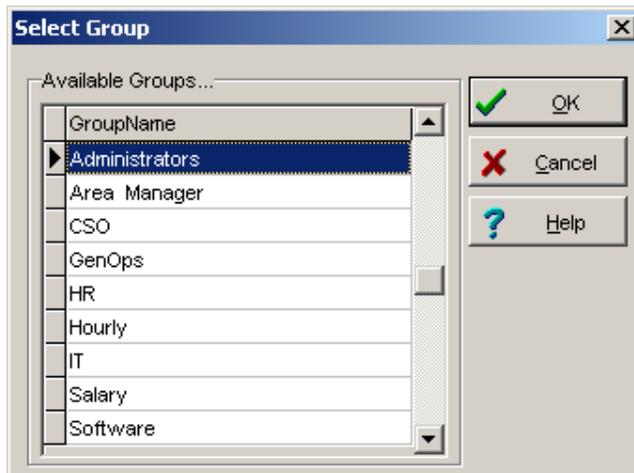


1. Working with Existing Groups

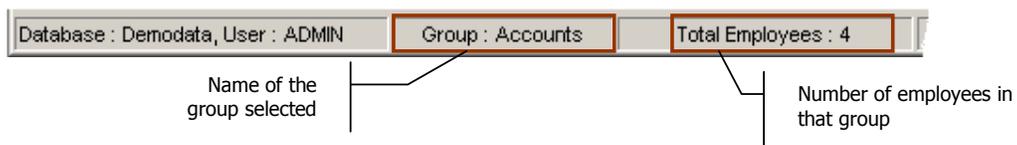


1.1 To View Members Of A Group

1. Click on **View** (Menu bar)
2. Click on **Select Group...**
3. In the Select Group dialog box a list of available groups is displayed



4. Click on the required group (in the case above, Administrators)
5. Click on **OK**
6. The members of that group will be filtered and displayed (Click on Personnel, Employee Details, List tab)
7. The status bar, at the bottom of the screen, indicates the name of the group you selected and the number of employees in that group



Additional Notes:

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1.2 To View All Employees

When you select a group of employee, you will only have access to those employees in each sub screen. Follow the instructions below to view all employees in the database.

1. Click on **View** (Menu bar)
2. Click on **Show All Employees**
3. The status bar will indicate that you are now viewing **All Employees**



1.3 Viewing an Employee Group Membership

1. Open the **Employee Details** (Master Details) Screen
2. Navigate to an employee
3. Click on **View** (Menu bar)
4. Click on **Group Membership...**
5. A screen similar to below will appear: -



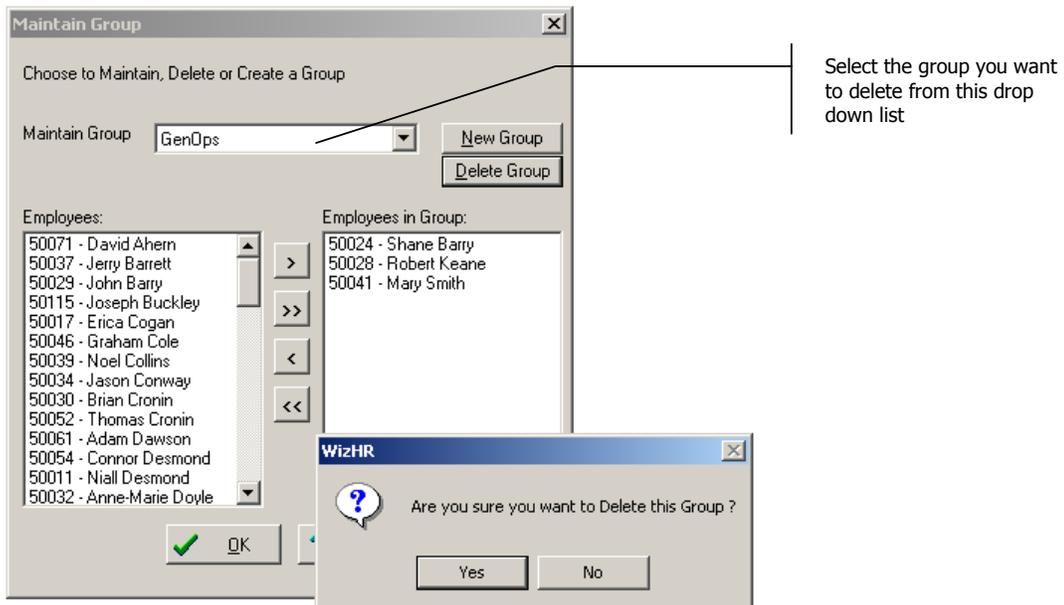
6. This is a list of groups to which this employee is a member
7. Click on **OK** to return to WBS



1.4 Deleting a Group

Groups which are not in use should be deleted on a regular basis. Groups are not dynamic (i.e. a group which is filtered, on say the Department field, will not automatically add a new employee into the group, even if they match the criteria the group is based on) and therefore outlive their usefulness in a relatively short period of time.

1. Click on **View** (menu bar)
2. Click on **Maintain Groups**
3. Select a group from the **Maintain Groups** drop down list



4. Click on **Delete Group** button
5. Click on **Yes**

Note:

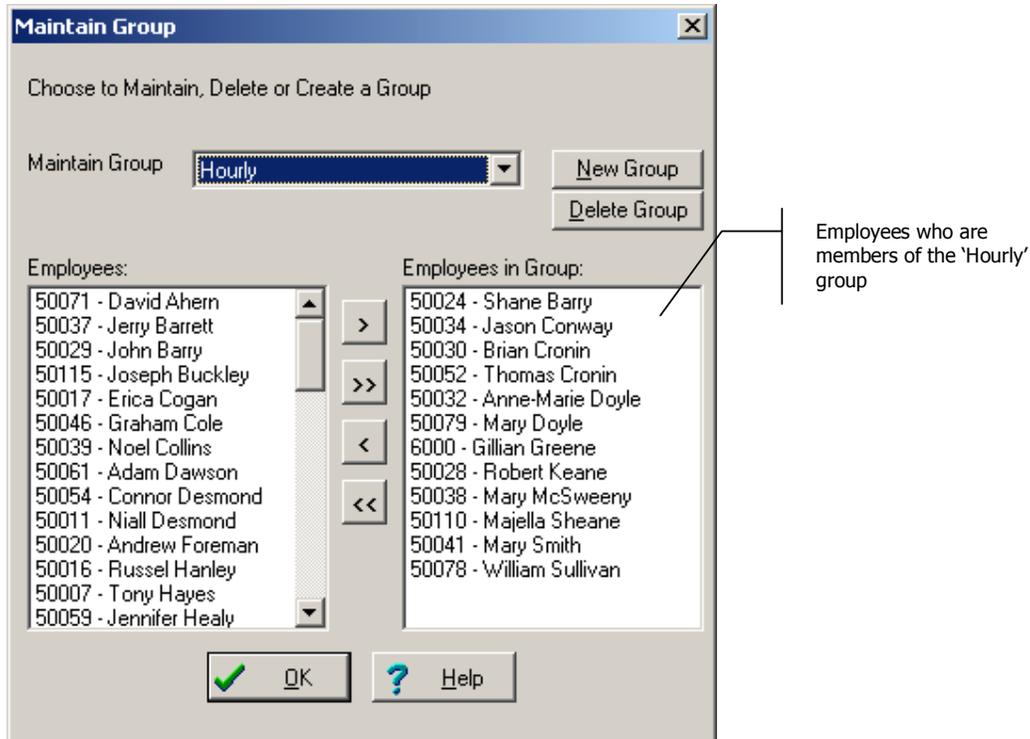
This will not delete employees from the database, rather deletes the group that these employees were members of

Additional Notes:

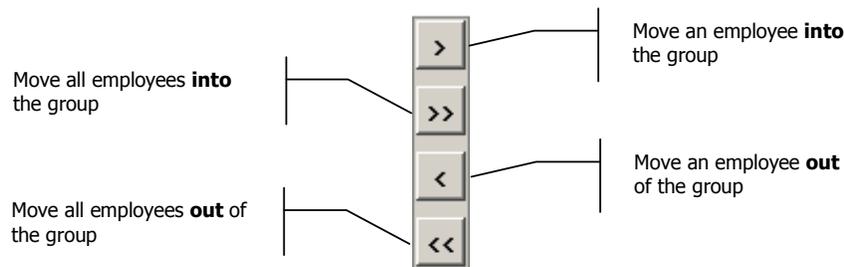
1.5 Modifying an Existing Group

Employees may be removed or added to a group at any time. Follow the instructions below to alter the composition of any group: -

1. Click on **View** (Menu bar)
2. Click on **Maintain Groups**
3. Select a group from the **Maintain Group** drop down list



4. Under the **Employees** heading (left hand side), are employees who are not in the group
5. Under **Employees in Group** (right hand side), are employees who are members of this group (in this case the 'Hourly' group)
6. Highlight the employee you want to move in or out of the group
7. Use the arrow buttons to move employees between the 'Employees' and 'Employees in Group' list



Note:

You can select multiple employees, using the left mouse button and the shift key



2. Creating New Groups

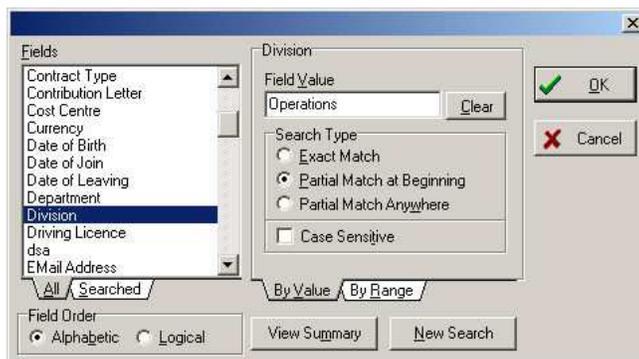
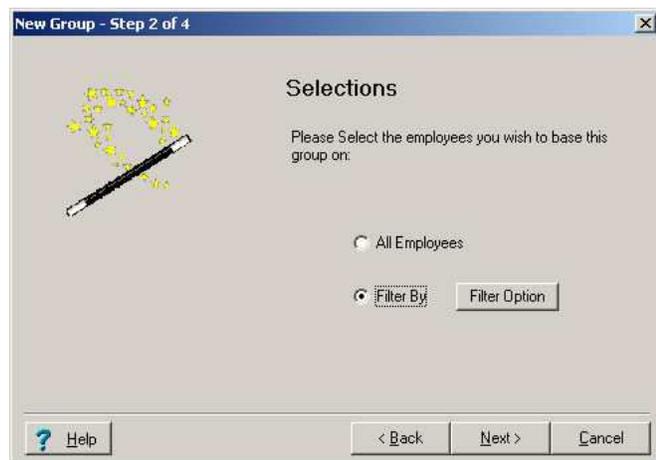


2.1 Create a New Group of Employees

Creating new Group

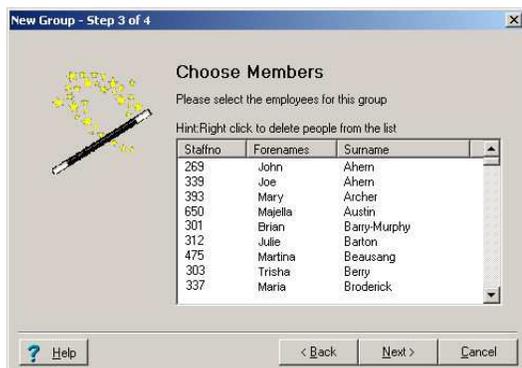
WBS will allow you to create a group using filters/criteria specified on the Employee Details screen. For instance you can create a group of employees who are in the Accounts department (i.e. filter employee records on the department field in the Master Details screen).

1. Click on **View** (menu bar)
2. Click on **Maintain Groups**
3. Click on the **New Group** button
4. The Group Wizard dialog box appears, click on **Next**
5. The **Selections** dialog box appears: -
6. Click on the **Filter by** radio button (the Filter Option becomes active)
7. Click on **Filter Option** button
8. Under the heading fields, select a **field** (in the case below, Division)
9. Under the heading field value, select key in a value (in the case below, Operations)

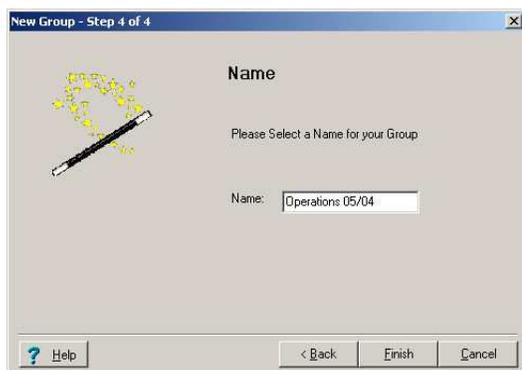


10. Click on **OK**. This will return you to the **Selections** dialog box.
11. Click on **Next**

12. A dialog box (similar to below) will appear with a list of employees who matched the criteria specified in the filter dialog box above.



13. Click on **Next**
14. Key in a name for the group (in the case above, Operation 05/04)
15. Click on **Finish**



16. The **Maintain Group** dialog box appears: -

- Listed on the left are employees who are NOT in the group. Listed on the right are employees who are in the group. See section 1.5 above on how to modify existing groups.
- While running a Global Update, archive, transfer, etc. use the group name to select the employees you want to work with.





3. Reporting on Groups of Employees



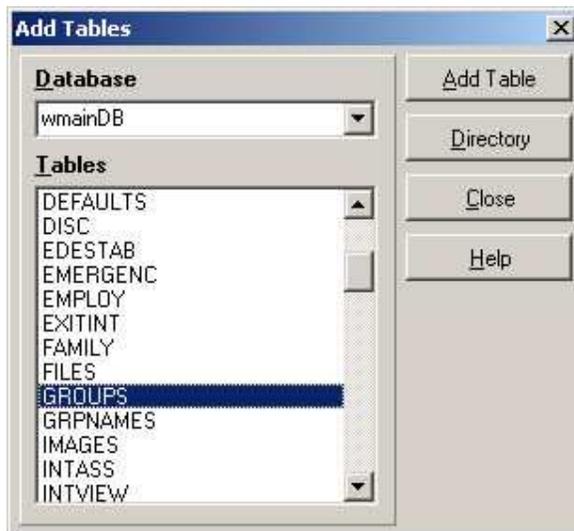
3.1 Add Groups to a Report

It is possible to filter a report based on a group which you created in WBS. However, in order to do this, a groups table must be added to the report. Follow the steps below: -

Create/open the report you want to add the group to.

Step 1: Adding the Groups Table

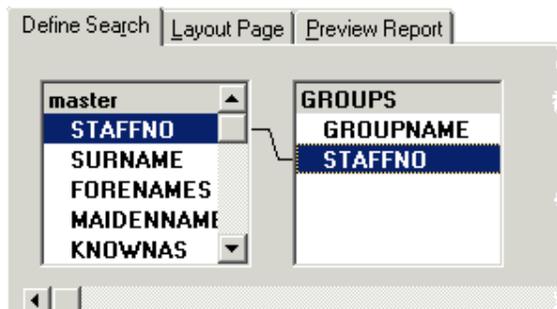
1. Click on the **Define Search** tab
2. Click on the **Add Table** button
3. A dialog box similar to below appears:



4. Select **Groups** from the list of available tables
5. Click on the **Add Table** button
6. Click on **Close**

Step 2: Linking the Groups table

1. Before a table may be used in a report, the table must be linked to existing tables in the report
2. All tables should be linked with the StaffNo
3. In the case below the StaffNo field in Master is linked with the StaffNo field in Groups. To achieve this, click and hold down the left mouse button over StaffNo under Master, keeping the left mouse button held down, move the mouse pointer over StaffNo under Groups, release the left mouse button. A black line should appear between both Staffno fields to indicate the link



Step 3: Adding Groups to the Report

1. Click on hold down the left mouse button over **Groupname** field, drag the field down into the next free column in the grid below the tables
2. Release the left mouse button over the free column
3. The grid should look similar to below when finished

HEADER	Address_Line_1	Address_Line_2	Address_Line_3	Address_Line_4	Address_Line_5	Address_Line_6	GROUPNAME
TABLE	master	master	master	master	master	master	GROUPS
FIELD	ADDRESS1	ADDRESS2	ADDRESS3	ADDRESS4	ADDRESS5	ADDRESS6	GROUPNAME
SHOW	Show	Show	Show	Show	Show	Show	Show
SORT	None	None	None	None	None	None	None
FILTER 1							
FILTER 2							

New column added

Additional Notes:



Step 4: Filtering the Report by Group

1. Double click on the word Groups in the Groupname column
2. Under **Is Equal To**, key in the name of the group you created (in the example below, a group called Accounts was created)
3. It should be noted that the spelling, punctuation and capitalisation must be accurate

Edit GROUPS.GROUPNAME

Field Properties | Custom Expression

Header GROUPNAME

Type String

Show Show

Sort None

Format

Width 20

Align Left

Filter 1 of 5

Is Equal To

Accounts Or

Or

Or

Or

Use BLANK for empty fields

OK

Cancel

Clear

← →

↓ ↑

Help

4. Click on **OK**
5. Click on Preview Report tab to view the result

Additional Notes:
