Manage Subgroups

Subgroups are made up of employee records grouped or selected from the database because of some common characteristic e.g. the same department or job title etc.

Some of the advantages of making use of subgroups are:

- Employee records can be put into smaller groups for example only those within a specific company branch or level.
- Subgroups can be used for batch editing etc.
- A user’s access can be restricted to only the employees in a subgroup.
- A subgroup can be defined to include employees from across different departments and subsidiaries.

Standard subgroups that are used more frequently are created automatically by the system.

How to link subgroups to a user, will be discussed in the Manage Users section.

Administrators can create customised subgroups using the Subgroup Query Builder. It will be to your advantage if you have SQL knowledge when using this functionality.

Working with Subgroups

Navigation from the Home page:

- ***System Administration | Subgroup*** to open the Subgroup List screen.

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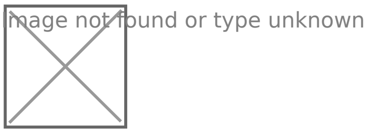
Creating a New Subgroup

Click on **Create** to open the Query Builder screen.

Enter a description and category for the new subgroup on the screen below.

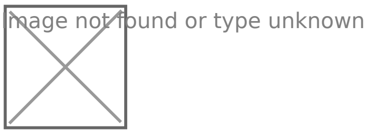


EXAMPLE OF A SUBGROUP CONDITION:

Gender = 'Male' AND Age > '50'

Creating a condition or criteria for a subgroup is a step-by-step process. As an example we will be building the condition shown above.

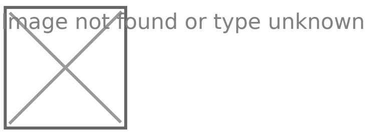
- In the **Available Fields** section, locate and click the *Gender* field
- From the **Operator** buttons choose the "="
- In the **VALUE** field, type in *MALE*
- From the **COMBINE** buttons click the **And** button
- In the **Available Fields** section, locate and click the *Age* field
- From the **Operator** buttons choose the ">"
- In the **VALUE** field, type in *50*
- Click on **Check Syntax** at the bottom of the page to validate your statement
- Click **Save**



Additional functionality available on the Query Builder screen are:

- **Undo**: Undo will undo your last step when building the condition.
- **Clear All**: Use to remove the entire condition.
- **Manual**: You get full control over the SQL portion of the condition as shown below. All other controls and buttons are removed, leaving only the available fields. A warning message alerts the user to the fact that only advanced users should attempt to manually edit a condition.

How to Delete a Subgroup



- Search for and locate the applicable subgroup you want to delete.
- Select the **Delete** check box.
- Select **Delete** to display the following confirmation message.

- Select **Yes** to confirm the delete action.

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