**Case Study 12 How to select one or a group of employees within payroll using the subset editor**

This case study is based on section 6.14 of the main website content

Subset functionality in the BFT is the means by which users can limit the records that are displayed in a particular view. The functionality applies across the various views in the payroll application. This guide will describe the example of selecting a subset of employees within the Main Planning View.

Within the Main Planning View Select the drop down option at the right edge of the 'Employee ID by CC Split' box (in the top left of the screen with the 'Rows' area). The subset window will appear as follows:
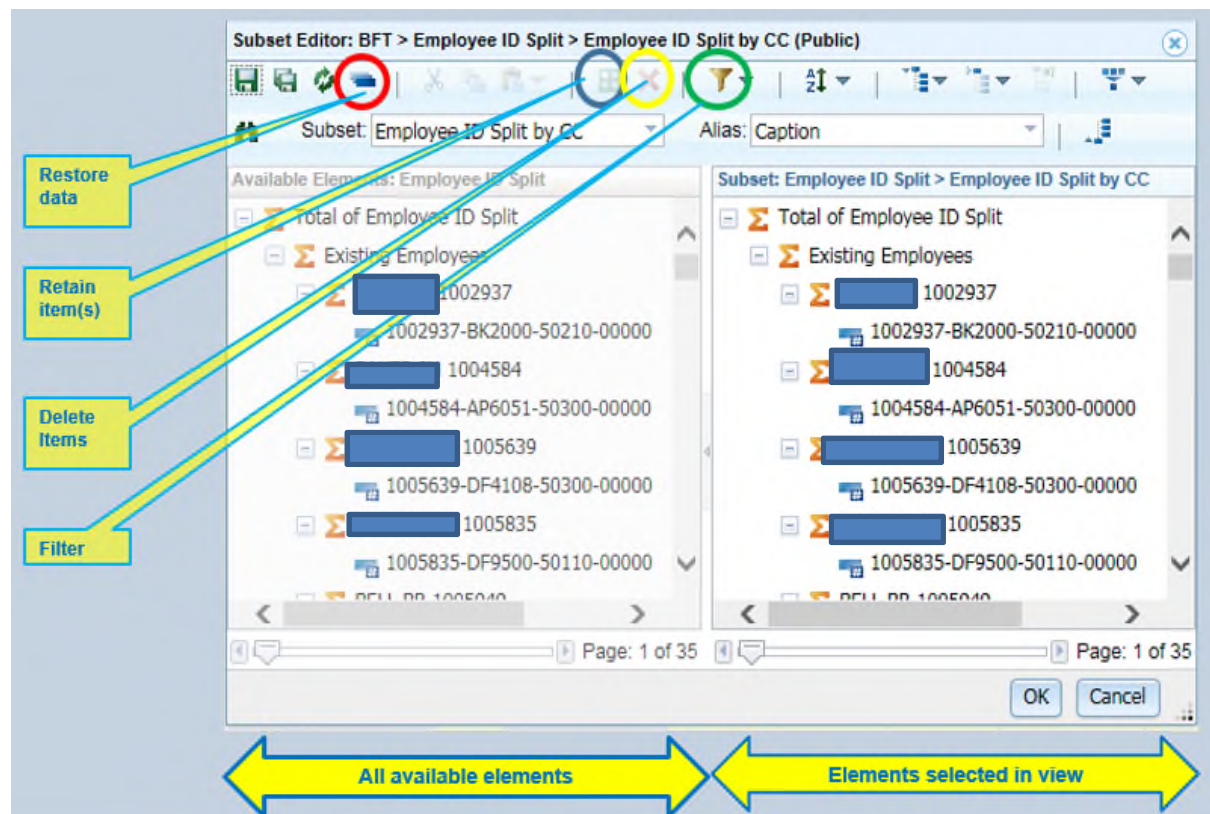
Subset functionality allows users to alter the current view in various ways. For instance it will allow users to restrict the planning view to only show employees fulfilling certain criteria, e.g. a certain staff classification code, or to restrict the view to a single individual or group or to all employees posted to a particular cost centre.

The pane on the left side marked 'Available Elements' shows all of the available Employee ID Splits by CC (Since this is the dimension you have selected). The pane on the right shows the records that are currently selected in the view.

In order to restrict the view it is necessary to amend the items appearing in the right hand pane. There are various ways of doing this. Perhaps the simplest option is to clear all entries in the right hand pane

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and move across from the left pane the records the user wishes to display. To clear the right hand pane, select any entry in this pane, remove all other entries by pressing the square green button (circled in blue above). This should leave a single entry (the one just selected) in the right hand pane. To remove this entry and clear this side of the screen press the red X button (circled in yellow above). When the right pane is cleared any entries from can be dragged across from the left pane, either individually or collectively (by holding down the shift key and the mouse click to select a range or the control key and the mouse click to select individual entries). The entries moved to the right pane will be those that are now displayed in the plan view.

To restore the right hand pane to include all available elements press the graded blue oblong button circled in red above. Another way to restrict the view is to use the filter (circled above in green). This filter will work in conjunction with either pane. In the above example the right hand pane is selected, as the heading is blue. To select the other pane, click on the heading 'Available Elements: Employee ID Split.'

There are three filter options, filter by level, attribute or expression. Filtering on the left pane will limit the elements available to move to the right hand pane, filtering on the right hand pane will limit the elements in that pane, and therefore the records displayed in the plan view.

   a) Filtering by level 1 collapses the records so that only the line that starts with surname is displayed. There are no other levels in this view to collapse so filtering at level 2 etc. clears the window

   b) Filtering by attribute enables certain records to be selected to view depending on which attribute is selected, (see list below). There is a second list beneath attribute which allows the user the make a further selection within each attribute e.g. a particular cost centre
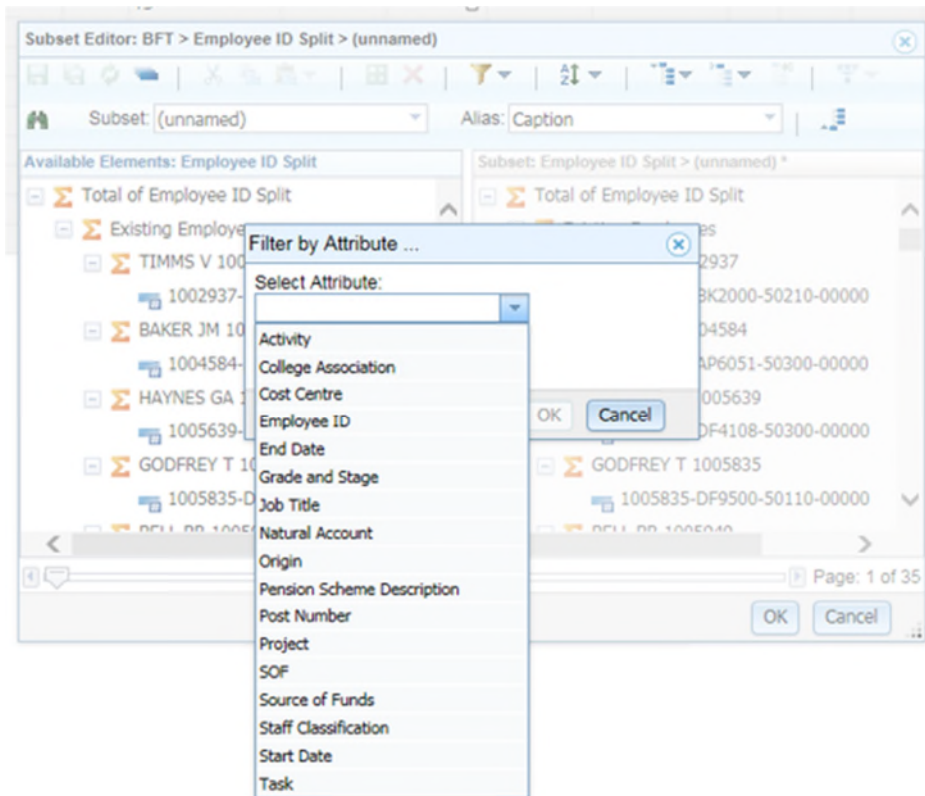
c) Filtering by element allows the user to search for a particular employee, using a wildcard *
option. E.g. to search for employees with the surname Godfrey, the user could enter God* . Or
users can drag employees across from the left hand pane into the right hand pane and press ok.

**To return to the previous 'all records' view go back to the subset (right arrow next to the
employee ID** split dimension). Select the right hand pane and press the blue oblong button circled in
red above. When all available records appear in the right hand pane press ok and return to the plan
view. All records should now be displayed.