

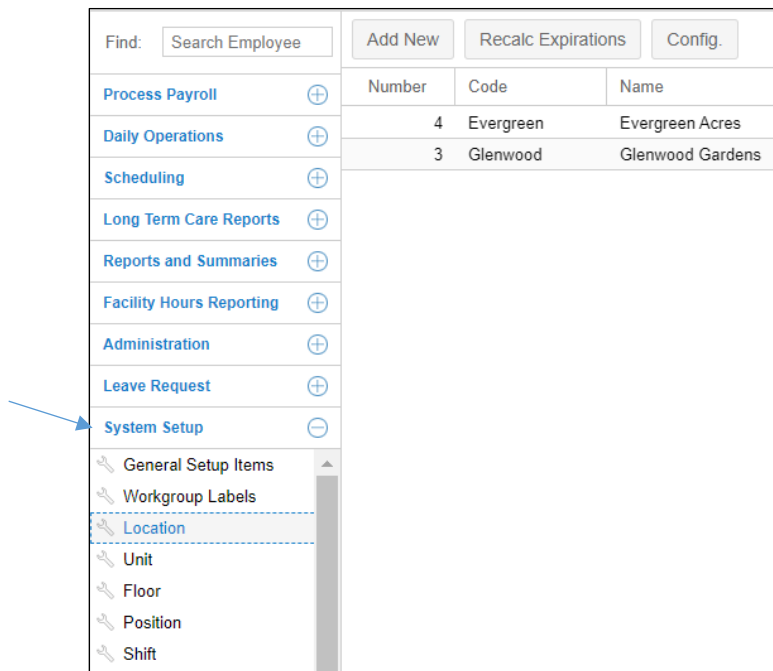
MSS3: Managing a Workgroup

A workgroup is part of the organizational characteristics that identify an employee. For example, an employee can be associated with a location, department, or cost center. Each location, department, and cost center are different workgroups. In Manager Self Service 3 (MSS3) you can create new workgroups and change existing workgroup names or abbreviation codes if you can access the System Setup menu.

Add a Workgroup

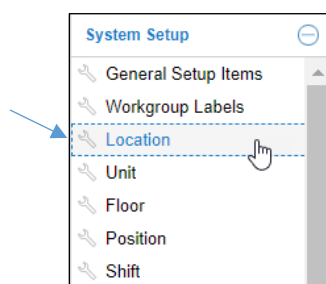
To add a workgroup:

1. Expand the System Setup menu in MSS3.



2. Click the workgroup level menu item you would like to add the new workgroup to. For example, if you are adding a new location workgroup, select the Location menu item.

Your selection of workgroup menu items in your System Setup menu are dependent on how your system was configured. Each workgroup in your system will have a menu item displayed in the System Setup menu.



Workgroup level page

Location								
Add New		Recalc Expirations		Config.				
Number	Code	Name	Active Uses	Expires	Unexpire	Delete	Reassign	
4	Evergreen	Evergreen Acres	121	2102-07-21		✖	↻	
3	Glenwood	Glenwood Gardens	203	2103-07-19		✖	↻	

3. In the workgroup level page (in this example the Location page), click the **Add New** button.

Location		
<input type="button" value="Add New"/> <input type="button" value="Recalc Expirations"/> <input type="button" value="Config."/>		
Number	Code	Name
4	Evergreen	Evergreen Acres
3	Glenwood	Glenwood Gardens

In the Add a Workgroup window a workgroup number is added automatically and is based on the number of existing workgroups in the specific workgroup level.

The 'Add a Workgroup' dialog box has a 'Properties' section with three fields: 'Number' (a dropdown menu showing 5), 'Code' (a text box containing 0005), and 'Name' (a text box containing Workgroup 5). At the bottom are 'Ok' and 'Cancel' buttons.

4. Type a name or number for the workgroup code in the *Code* field and a name for the workgroup in the *Name* field.

The 'Add a Workgroup' dialog box is shown with the 'Number' field set to 5, the 'Code' field containing the text 'Elmwood', and the 'Name' field containing the text 'Elmwood Gardens'. The 'Ok' and 'Cancel' buttons are visible at the bottom.

5. Click **OK**.

The new workgroup will be displayed in the workgroup level page.

New workgroup

Location							
Add New Recalc Expirations Config.							
Number	Code	Name	Active Uses	Expires	Unexpire	Delete	Reassign
5	Elmwood	Elmwood Gardens	0			✂	↻
4	Evergreen	Evergreen Acres	121	2102-07-21		✂	↻
3	Glenwood	Glenwood Gardens	203	2103-07-19		✂	↻

- To add an expiration date for the new workgroup, click the workgroup row and add the expiration date in the *Expires* field.

Location							
Add New Recalc Expirations Config.							
Number	Code	Name	Active Uses	Expires	Unexpire	Delete	Reassign
5	Elmwood	Elmwood Gardens	0	12/31/2024		✂	↻
4	Evergreen	Evergreen Acres	121			✂	↻
3	Glenwood	Glenwood Gardens	203			✂	↻

December 2024

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Today

- Click the **Update** button to add the expiration date.

When a workgroup expires, the *Unexpire* column is displayed. You can click the Folder icon of the expired workgroup to set a new expiration date.

Number	Code	Name	Active Uses	Expires	Unexpire	Delete	Reassign
1	CNA	CNA	123	2101-07-01		✂	↻
2	Cook	Cook	31	2101-07-01		✂	↻
3	Dietician	Dietary	4	2101-07-01		✂	↻
4	DON	DON	25	2101-07-01		✂	↻
5	Houskeeping	Houskeeping	18	2101-07-01		✂	↻
6	Laundry	Laundry	18	2101-07-01		✂	↻
7	LPN	LPN	31	2101-07-01		✂	↻
8	Occupational ...	Occupational Therapy	4	2101-07-01		✂	↻
9	Office/Admissi...	Office/Admissions	15	2101-07-01		✂	↻
10	Physical Therapy	Physical Therapy	4	2101-07-01		✂	↻
11	Recreation	Recreation	3	2101-07-01		✂	↻
12	RN	RN	32	2101-07-01		✂	↻
13	Server	Server	13	2017-07-20	📁 expired	✂	↻
14	Social Services	Social Services	4	2101-07-01		✂	↻

Enable the Please Confirm checkbox and click **OK** in the Unexpire a Workgroup window.

The screenshot shows a dialog box titled "Unexpire a Workgroup". It has a "Properties" section with the following fields:

- Number: 13
- Code: Server
- Name: Server
- Expired On: 7/20/2017
- Please Confirm: (indicated by a blue arrow)

 At the bottom are "Ok" and "Cancel" buttons.

Adding Recalculation of Expiration Dates

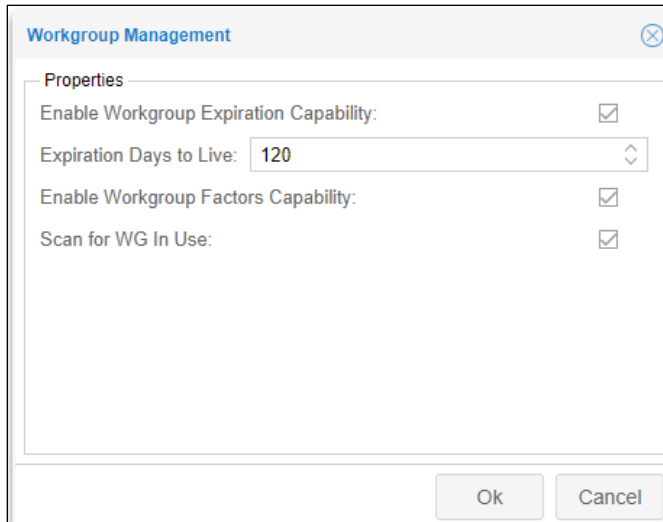
The Recalc Expirations operation recalculates the expiration date based on the value specified in the *Days to Live* field before reassignment or removal of expired workgroups. If you want to add an expiration date to a new workgroup when expiration dates have not been previously used:

1. Click the **Config** button to add the **Recalc Expirations** button and the Expires column in the workgroup management window.

The screenshot shows a window titled "Departments" with two buttons: "Add New" and "Config.". Below the buttons is a table with the following data:

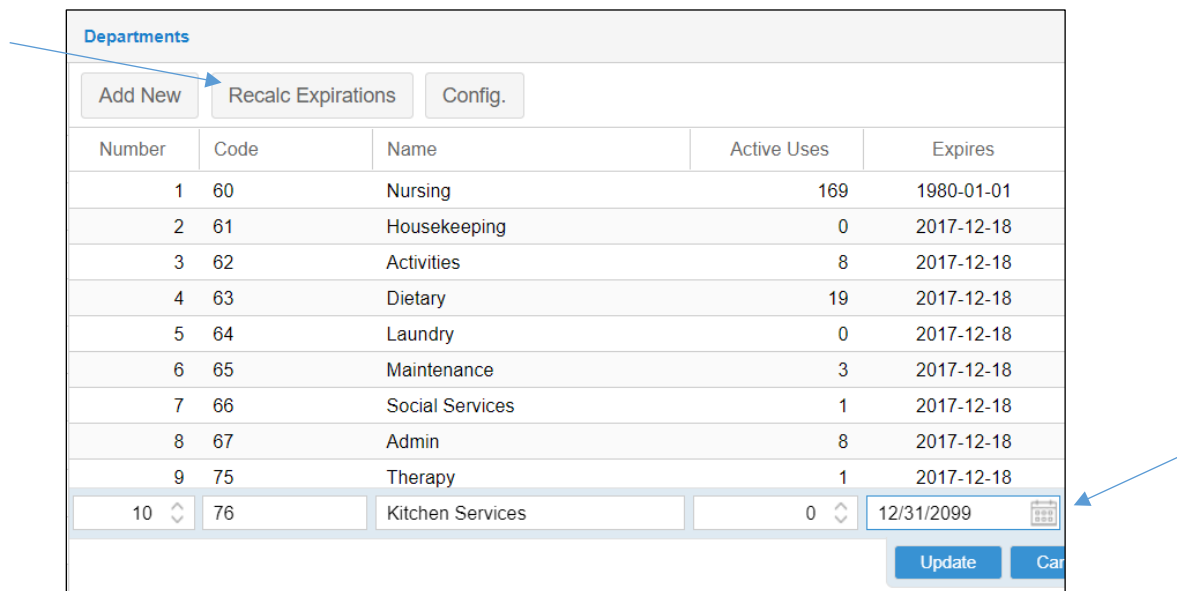
Number	Code	Name	Active Uses	Delete	Reassign
1	60	Nursing	169	✂	↻
2	61	Housekeeping	0	✂	↻
3	62	Activities	8	✂	↻
4	63	Dietary	19	✂	↻
5	64	Laundry	0	✂	↻

2. Enable the workgroup expiration capability and type the number of days until expiration if you want the workgroup to expire.



3. Enable the workgroup factors capability if you are using the coverage budget module to monitor the workgroup. A workgroup factor is a float (decimal) number stored for each workgroup to identify different ratios for workgroups. The default value for each workgroup factor is zero.
4. Enable the Scan for WG in Use checkbox to scan the workgroups that are currently in use and update numbers in the Active Uses column of the workgroup level page.
5. Click **OK**.

The Recalc Expirations button will be displayed in the workgroup window.



6. Add an expiration date to your workgroup by clicking the row and adding a date in the Expires field and clicking the **Update** button.

Edit a Workgroup

To edit a workgroup, click the workgroup row in the workgroup level page. You can type new entries in the fields of the workgroup. Click the **Update** button to save your changes.

Location							
Add New		Recalc Expirations		Config.			
Number	Code	Name	Active Uses	Expires	Unexpire	Delete	Reassign
5	Elmwood	Elmwood Gardens	0	12/31/2099			
4	Evergreen	Evergreen Acres	121	2102-07-21			
3	Glenwood	Glenwood Gardens	203	2103-07-19			

Remove a Workgroup

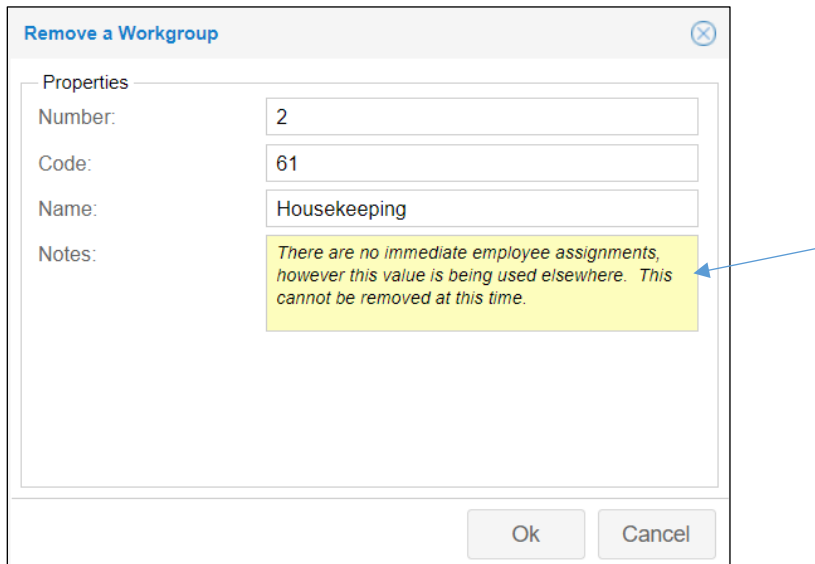
The number in the *Active Uses* column indicates the number of employees with the specific workgroup assigned to them. If the workgroup indicates active uses, the workgroup must first have uses assigned to another workgroup before it can be removed. If there are no active uses for the workgroup and the workgroup does not have uses in an archived period, you can remove the workgroup using the **Scissor** icon in the *Delete* field.

To remove a workgroup:

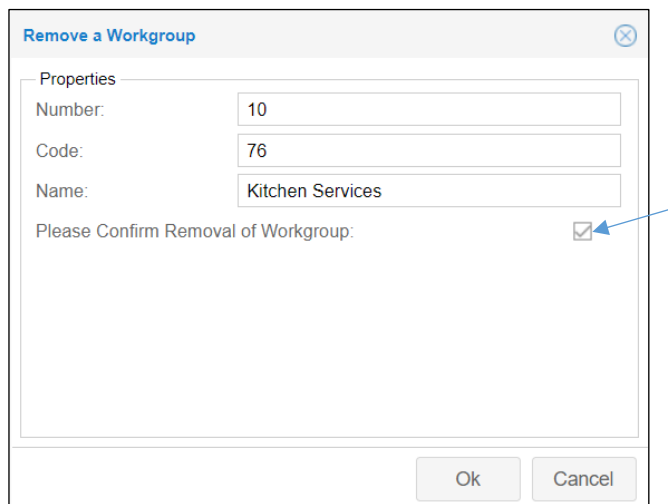
1. Click **Scissor** icon in the in the Delete column for the workgroup you want to delete

Departments						
Add New		Config.				
Number	Code	Name	Active Uses	Delete	Reassign	
1	60	Nursing	169	✂	↻	
2	61	Housekeeping	0	✂	↻	
3	62	Activities	8	✂	↻	
4	63	Dietary	19	✂	↻	
5	64	Laundry	0	✂	↻	
6	65	Maintenance	3	✂	↻	
7	66	Social Services	1	✂	↻	
8	67	Admin	8	✂	↻	
9	75	Therapy	1	✂	↻	
10	76	Kitchen Services	0	✂	↻	

If you have active uses or uses in an archived period, you will get an error message. You will need to reassign the uses to a different workgroup to be able to delete the workgroup.



2. Confirm the removal of the workgroup by enabling the confirmation checkbox in the *Remove a Workgroup* window.







3. Click **Ok**.

Reassign an Existing Workgroup

The reassign function will seek out existing usages of a workgroup and replace them with the workgroup you select.

To reassign an existing workgroup:

1. Click the  icon in the *Reassign* column of the workgroup you want to reassign.

Location							
Add New Recalc Expirations Config.							
Number	Code	Name	Active Uses	Expires	Une...	Delete	Reassign
5	Elmwood	Elmwood Gardens	0			✂	
4	Evergreen	Evergreen Acres	121	2102-07-21		ⓘ	
3	Glenwood	Glenwood Gardens	203	2103-07-19		ⓘ	

2. Select a replacement workgroup from the drop-down menu in the *Reassign Existing Workgroup Usages* window.

Reassign Existing Workgroup Usages

Properties

Replacement Workgroup:

Notes: *This operation will seek out existing usages of this workgroup and replace it with the one specified.*

Please Confirm:

OK Cancel

3. Enable the confirmation checkbox.
4. Click **OK**.

The active uses columns for two workgroups are updated to reflect employee reassignment results.