

## Create or Update a Dynamic Group

### Important Information

- This procedure is used by the Shared Services Center (SSC). The SSC creates Dynamic Groups upon request for units on the Ann Arbor, Dearborn and Flint campuses. They can also provide advice on what data is effective as Dynamic Group Criteria.
- A dynamic group is created with employee selection criteria that adds or removes employees automatically based on HRMS data (e.g., Dept ID = 123456 and employees = temporary).
- Each night, an automated process updates all Dynamic Groups based on the selection criteria. It updates the groups to reflect changes such as staff transfers in and out of a unit, terminations, new hires, etc.
- For a complete list of the HRMS data elements available to define Dynamic Groups, including examples of effective criteria, refer to the [Choosing Dynamic or Static Groups – Support Material](#) document on My LINC.

### Navigation

NavBar > Navigator > Set Up HRMS > Security > Time and Labor Security > **Dynamic Group**

### Find an Existing Value Page

**Dynamic Group**  
Enter any information you have and search. Leave fields blank for a list of all values.

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**Search Criteria**

Group ID:   1

Description:

Case Sensitive

Limit the number of results to (up to 300):

2   [Basic Search](#) [Save Search Criteria](#)

**Search Results**

View All First 1-8 of 8 Last

Group ID	Description
D0001	MOR and MPP
D0002	All MOR Employees
D0003	All MPP Employees
D0004	All BWC Employees
D0005	All BWR Employees
D0006	Single Supervisor ID

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### Identify the Next, New Dynamic Group Number

1. Type **D0** (Dzero) in the **Group ID** field.

#### Notes:

- To create a new Dynamic Group, you need to identify the next available Group ID that can begin with D. The letter D is then followed by four digits that are incremented with each new Dynamic Group.
- When D0999 is reached, the next new ID needs to be D1000. After D1000 is created, begin searching on D1 to identify the next new Group ID.

2. Click .
3. Make note of the next available Group ID value.

**Note:** In the example shown here, the next available Group ID would be **D0007**.

4. To create a new Dynamic Group, click **Add a New Value**, or

To update an existing Dynamic Group, enter the Group ID, click  and skip to step 7 or 8.

### Add a New Value Page

### Create the Dynamic Group

5. Enter the alpha-numeric value of the new Dynamic Group in the **Group ID** field.

**Note:** The screenshots in this procedure show SSC01 in the Group ID field for training purposes. It is not a valid value.

6. Click .

### Selection Criteria Page

7. Type a meaningful description (e.g., Shared Services Center – BW Temp) for the group in the **Description** field.

**Notes:**


- The **Short Description** field defaults to the first ten characters of the description when the group is saved.
- Do not select a value in the **Taskgroup for Time Reporting** field.

### Selection Criteria Page (Continued)

### Define the first row of criteria

8. Select a value from the drop-down list in the **Record** field.

**Note:** See the end of this procedure for a list and descriptions of the HRMS data used to define Dynamic Groups.

9. Click  in the **Field Name** field and select an appropriate value from the list that appears.
10. Accept the default of **UMICH** in the **SetID** field.

**Selection Criteria Page (Continued)**

The screenshot shows the 'Selection Criteria' page with the following details:

- Group ID: SSC01
- Last Refresh Date/Time: 12/19/2014 1:57 PM
- Description: Shared Services Center - BW Te
- Short Description: Shared Ser
- Taskgroup for Time Reporting: (empty dropdown)
- Select Parameters table:
 

Record	Field Name	SetID	Operator	Value
WHERE	JOB	DEPTID	UMICH	123456
- Where Clause SQL: FROM %SQL(TL\_GRP\_FROM\_BASE) WHERE %SQL(TL\_GRP\_BATCH\_WHERE\_BASE,%P(1)) AND (JOB.SETID\_DEPT=UMICH AND JOB.DEPTID = 123456)

**Define the first row of criteria (Continued)**

11. Select the appropriate operator from the drop-down list in the **Operator** field.

Operator	Selects employees whose data:
<	Is less than the value.
<=	Is less than or equal to the value.
<>	Is not equal to the value.
=	Is equal to the value.
>	Is greater than the value.
>=	Is greater than or equal to value.
Like	<ul style="list-style-type: none"> <li>Selects employees who meet one of a number of values that have a common attribute.</li> <li>Include the wildcard search character % as needed when entering a partial value. For example, a value of <b>Workgroup = S%</b> will return employees in any Workgroup that begins with the letter S.</li> </ul>

12. Click Lookup in the **Value** field and select an appropriate value from the list that appears.

13. For each additional row of criteria, click **Add Row** .

**Selection Criteria Page (Continued)**

The screenshot shows the 'Selection Criteria' page with the following details:

- Group ID: SSC01
- Last Refresh Date/Time: 12/19/2014 1:57 PM
- Description: Shared Services Center - BW Te
- Short Description: Shared Ser
- Taskgroup for Time Reporting: (empty dropdown)
- Select Parameters table:
 

Record	Field Name	SetID	Operator	Value
WHERE	JOB	DEPTID	UMICH	316360
AND	EMPLOYMENT	SUPERVISOR_ID	UMICH	92752504
- Where Clause SQL: FROM %SQL(TL\_GRP\_FROM\_BASE) WHERE %SQL(TL\_GRP\_BATCH\_WHERE\_BASE,%P(1)) AND (JOB.SETID\_DEPT=UMICH AND JOB.DEPTID = 123456)

**Define additional rows of criteria**

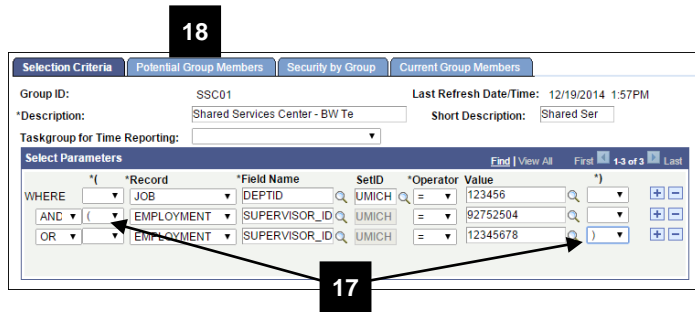
14. For each row of additional criteria, select an appropriate value in the **AND/OR** field:

- Select **AND** when the next criteria row needs to be met in addition to the current row.
- Select **OR** when either the current criteria row or the next row needs to be met.

15. Select appropriate values in the **Record**, **Field Name**, **Operator**, and **Value** fields.

16. For each additional row of criteria, click **Add Row** and repeat steps 11-12.

**Selection Criteria Page (Continued)**



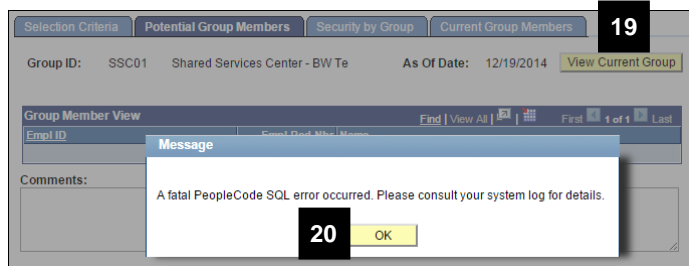
**Group rows of criteria**

17. To group rows or criteria that need to be reviewed in relation to each other, select **Left Parenthesis (** and **Right Parenthesis )** in the appropriate locations.

In this example, the first row specifies a Department ID. The next two rows are grouped together with parentheses because one or the other must be met in addition to the first row.

18. After defining all the necessary rows of criteria, click the **Potential Group Members** tab.

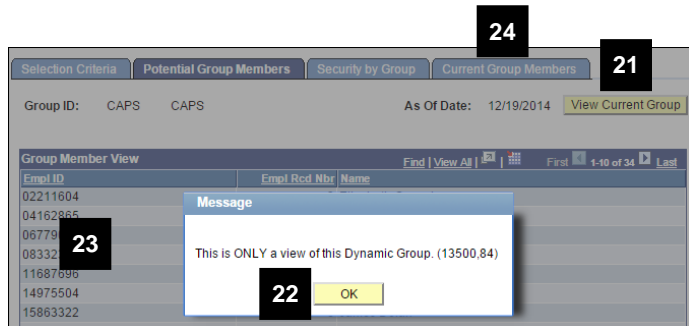
**Potential Group Members Page**



**Test the criteria**

19. Click **View Current Group**.
20. If an error message displays, click **OK** and return to the **Selection Criteria** tab to correct invalid values, logic, etc.

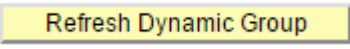
**Potential Group Members Page**




21. If you corrected the criteria, click **View Current Group** again on the **Potential Group Members** tab.
22. If a message indicates "This is ONLY a view of this Dynamic Group," click **OK**.
23. Verify the correct or expected individuals are in the "view" of the group. This may require contacting the requesting unit to validate the results.
24. If the criteria selected the correct employees, click the **Current Group Members** tab.

**Current Group Members Page**

**Save the Dynamic Group**

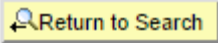
25. Click 

**Message Dialog Box**


26. Click  on the message that indicates the group will be saved.

**Current Group Members Page (Continued)**

27. Review the list to verify it matches the view from the **Potential Group Members** tab.

28. Click  to add or update another Dynamic Group.

**HRMS Data – Descriptions for use in Dynamic Groups**

<b>Record (Table)</b>	<b>Field Name(s)</b>	<b>Descriptions and Instructions</b>
DEPT_BUDGET_ERN Department Budget Earnings	ACCT_CD Account Code	Also known as ShortCode or Combo Code. It is a six-digit code used to record and summarize financial transactions. It is not the same as the "Account value" in a ChartField Combination.  Use in criteria to select employees who are funded by a specific ShortCode.   For employees funded on two or more ShortCodes for a single appointment, specify only one ShortCode in the criteria. This is because the Dynamic Group fails if it tries to return multiple ShortCodes for employees in one Department ID.
	DEPTID Department ID	A code that identifies each academic or administrative unit that has programmatic, operational and fiscal (including budgetary) responsibility for an employee's appointment.
JOB Job	ACCT_CD Account Code	Also known as ShortCode or Combo Code. It is a six-digit code used to record and summarize financial transactions. It is not the same as the "Account value" in a ChartField Combination.
	EMPL_STATUS Employment Status	Use to distinguish employees on Leave of Absences.
	FTE Full Time Equivalent	The system calculated percent of effort derived from standard hours for an employee in a job.
	PAYGROUP	A code indicating a set of employees grouped together for payroll processing.  Examples of valid values: BWC = Reg Bwlky; MGS = Grad Stdnt; MPP and MOR = Monthly Paid
	REG_TEMP	A code indicating whether a JobCode or a job is considered a regular or temporary JobCode or job.  Example of valid values: R = Regular; T = Temporary
	STD_HOURS	The number of hours the person will work in the associated appointment during the course of one week
	SUPERVISOR_ID	A code representing the EMPLID of the supervisor for a given employee in a given job.
TL_EMPL_DATA Time and Labor	TCD_GROUP_ID	The Time Collection Device ID for Punch Timeclock employees

Employment Data	WORKGROUP	A code representing a grouping of employees with similar time reporting requirements. Example of valid values: CAMPNURSE = Campus Nurses; MNURSEMO = Nurse Monthly; SNONEXCAMP = Self-service NONEXCAMP
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