

Supervisor Assignment Functions

Below, you will find instructions for a number of supervisor assignment functions that should prove useful for multiple company supervisor/hierarchy changes.

*** We highly recommend that when you begin reassigning supervisor level assignments you start assigning at the highest level first.**

How do I promote an employee to a supervisor?

1. Update Supervisor Level Assignment
 - a. Navigate to Employee Maintenance> Employee Assignments>Supervisors>Supervisor Level Assignment Tab
 - b. Click 'Add New:' button
 - c. Choose Supervisor Group and Effective Date
 - d. Click Save Supervisor Assignment
2. Add Employees to the New Supervisor
 - a. Navigate to Global Update>Employee Update
 - b. In 'Select a Function:' dropdown choose Supervisor
 - i. Assignment Action: Add
 - ii. New Supervisor: Choose the name of the promoted employee
 - iii. Effective Date: This date should always be the start date of a pay period
 - iv. Stop Date: Leave this blank unless this is a limited assignment
 - v. Highlight employees in the 'Available' box that will be assigned to the new supervisor and click the << button
 1. NOTE: Holding down Ctrl will allow you to highlight multiple employees individually
 2. NOTE: Holding down Shift will allow you to highlight multiple employees at one time
 - vi. Click SAVE
 1. The employees should now be assigned to the new supervisor
3. Assign New Security Permissions
 - a. Navigate to Security Setup>User Security
 - i. Select the new supervisor's username in the Select User Dropdown
 - ii. Scroll down on the page to the Group Membership section

- iii. The Security Group in the 'Group Membership' section will generally be an Employee Level
- iv. Remove the Employee Group Membership and replace with a Manager or Supervisor Group Membership
- v. Click Save

How do I assign supervisors to multiple employees at once?

1. After logging into your system, using the left hand side navigate to: **Global Update > Employee Update**
2. From there, use the dropdown box in the upper-right of the page (the one that reads **Select a Function**) and choose **Supervisor**
3. Once this page loads, you will see the following screen:

Employee Update SELECT A FUNCTION: Supervisor

Assignment Action: Add

New Supervisor: Please Select

Effective Date: 06/06/2015

New Stop Date:

Depth / Org Level: CLEAR

ASSIGNED

AVAILABLE

CHESNEY, CHRISTINE

COOLIDGE, BEN

COSTELLO, DAVE

CRESTFALLER, LARRY

DAVIS, BECKY

DELACROIX, NICHOLAS

DIMARCO, DEANA

DOSIER, TERESA

Employee, Bob

SAVE

4. Starting at the top of the screen:
 - a. Leave the **Assignment Action** as **Add**
 - b. Set **New Supervisor** to the employee/supervisor you wish to assign to your employees.
 - c. You can leave the fields **Effective Date**, **New Stop Date**, and **Depth / Org Level** alone
 - d. Finally, using the Available list, select the employees you wish to have assigned to the supervisor you chose above. Press << to move them from

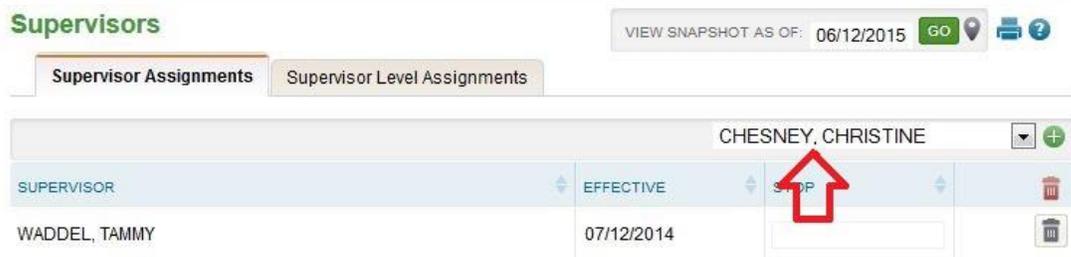
the right side of the box to the left. Only names on the left side will be assigned.

- e. When ready to commit your changes, click **SAVE** at the bottom of the page.

How do I allow a supervisor to approve time of a higher level employee?

1. After logging into your system, navigate to Global Update > Employee Update.
2. From there, use the drop-down in the upper right-hand corner and choose "Supervisor" from the list.
3. On this supervisor screen, make sure that the Assignment Action is set to "add", the new supervisor is the lower-level employee you wish to assign, and the higher-level employee is selected and moved to the left side of the filter box.
4. Finally, click **SAVE**.

Why doesn't a supervisor's name appear in the list?



The screenshot shows a web interface for managing supervisors. At the top, there's a header "Supervisors" and a "VIEW SNAPSHOT AS OF:" dropdown set to "06/12/2015". Below this are two tabs: "Supervisor Assignments" (selected) and "Supervisor Level Assignments". A search bar contains "CHESNEY, CHRISTINE". Below the search bar is a table with columns: "SUPERVISOR", "EFFECTIVE", "STOP", and a trash icon. The table has one row: "WADDEL, TAMMY" with an effective date of "07/12/2014". A red arrow points to the "SUPERVISOR" column header.

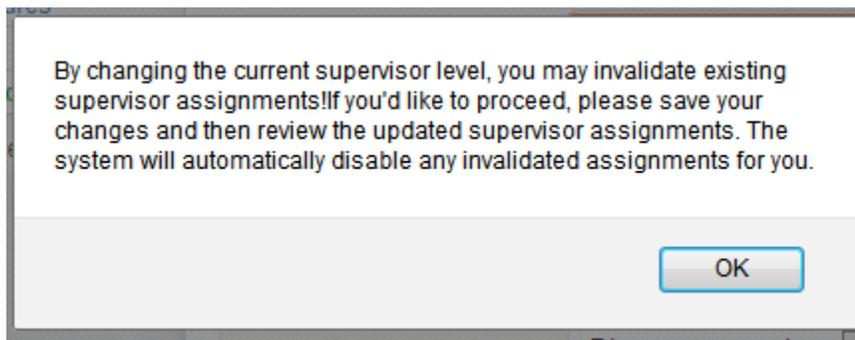
This list of available supervisors will only contain supervisors that have a higher supervisor level than the person you are assigning.

SAVE

Note – Only supervisors with a supervisor level above the employee's selected supervisor level will appear in the available supervisors list. For example, if an

employee has a supervisor level listed as 'Employee', the supervisor of that employee will need to have a supervisor level of 'Supervisor' or higher.

1. To establish supervisor assignments, follow these steps:
 - Only establish supervisor assignments after a supervisor group (Supervisor Level) is specified. This can be assigned by going to **Employee Maintenance > Supervisors > Supervisor Level Assignments**
 - Select Employee Maintenance > Supervisors and select the Supervisor Assignments tab.
 - Select the + in the Add New section of the page and select the supervisor you wish from the drop-down.
 - Enter a different effective date if you wish (default is the first day of the current period).
 - Click SAVE.
2. To change an employee's supervisor group to a lower level (i.e. from supervisor to employee), follow these steps:
 - Set an employee filter to those employees with a supervisor equal to the employee you will be updating. See 'Using Filters' in the Overview section for more information on setting filters.
 - Assign new supervisor(s) to the employees currently assigned to the supervisor via Employee Assignments> Supervisors or Global Update < Employee Update.
 - Remove the employee filter and select the employee whose supervisor level you wish to update.
 - Select Employee Maintenance > Supervisors > Supervisor Level Assignments
 - Select the lower assignment option under the Supervisor Group tab. The following message will appear:



- Select OK.
 - Click SAVE.
 - The list of available supervisors for the employee will be changed as necessary and previous supervisor assignments to other employees will be removed.
3. To modify supervisor group assignments, select the Supervisor Level Assignments tab and the following screen will display:

Supervisors VIEW SNAPSHOT AS OF: 06/12/2015  

Supervisor Group:

Effective Date:

Stop Date:

View Limit Preference:

Alert Limit Preference:

How do I make an employee an administrator?

1. Navigate to Security Setup > User Security
2. Remove the employee's current Group Membership.
3. Add the administrator group to Group Memberships.
4. Click SAVE