UPDATING REPORTS TO

This document outlines how to change the 'Reports To' data in the University's HR Management System (HRMS).

The HRMS uses position hierarchy for workflow related to Absence Approval. Every position in the HRMS must report to another position with an active incumbent.

When a staff member does not have a supervisor in HRMS all leave and training applications, once submitted by the staff member, bounce to HR Systems instead of being sent to the relevant supervisor which can result in a delay in applications being approved. This can be simply fixed by ensuring that all staff report to a position with an active incumbent.

When a supervisor changes positions or leaves the University the reporting line can be broken. HR Practitioners are responsible for maintaining the 'Reports To' data for people in their area.

For example:

The Brumbies Working Group is a small group formed to provide leadership to the team. The CEO of is Andrew Fagan, the head of the Working Group is Captain Stirling Mortlock and the members of the group are Clyde Rathbone, Gene Fairbanks and Adam Ashley-Cooper.

It would be represented as follows –

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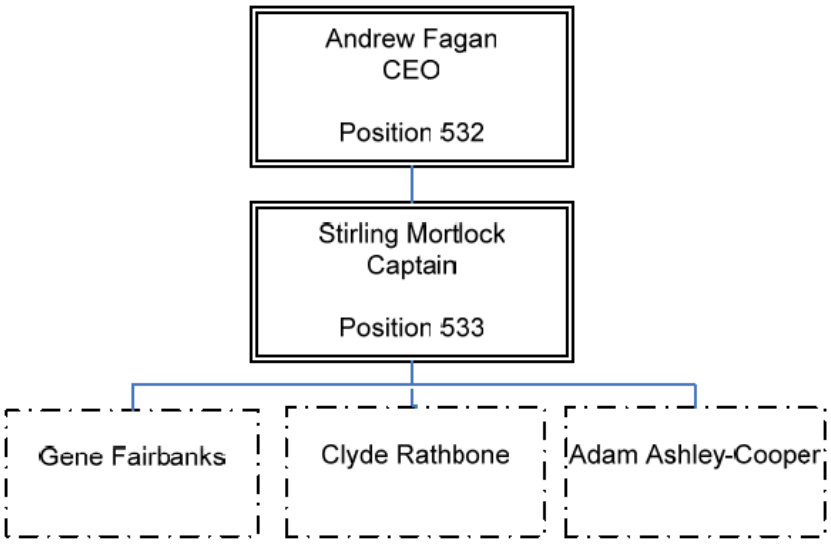

Where a situation arises that a supervisor changed, the 'Reports To' field in Position Information need to be updated and then be pushed through to Job Data by ensuring the Update Incumbent box is ticked.

Therefore when Stirling Mortlock is transferred temporarily to Andrew Fagan position for a period of time, HR Practitioners need to update the 'Reports To' field for Gene, Clyde and Adam's position. They need to reports to position 532 instead of 533.

1.	Navigate to the Position Information page Main Menu>Organisational Development>Position Management>Maintain Positions/Budget>Add/Update Position Info
2.	Enter the position number for the people that you wish to update and click the Search button. If you are unsure of their position numbers you can access them through Job Data – Work Location Page.

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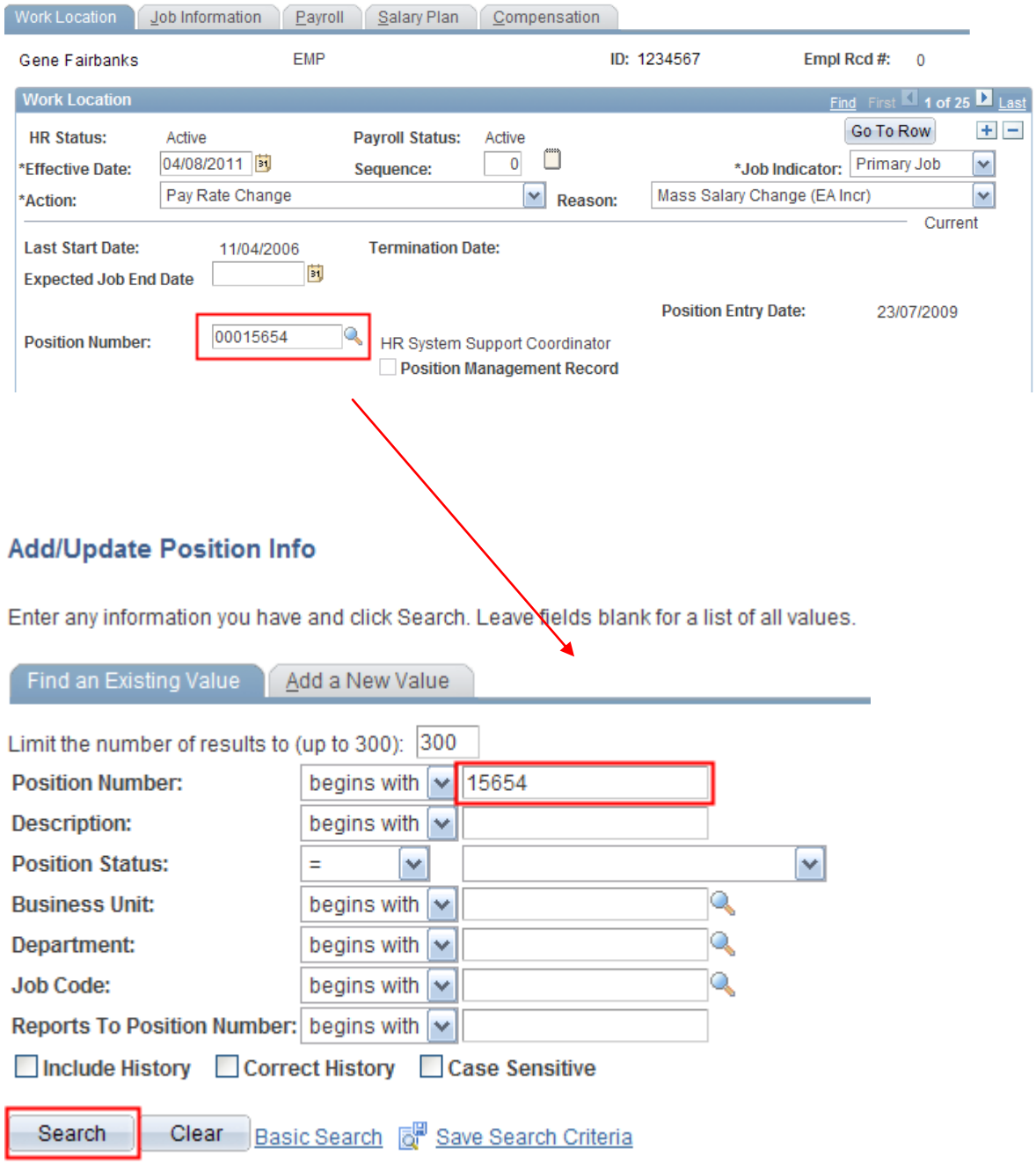

3. Insert a new row by pressing the Plus button in the upper right hand corner of the page.

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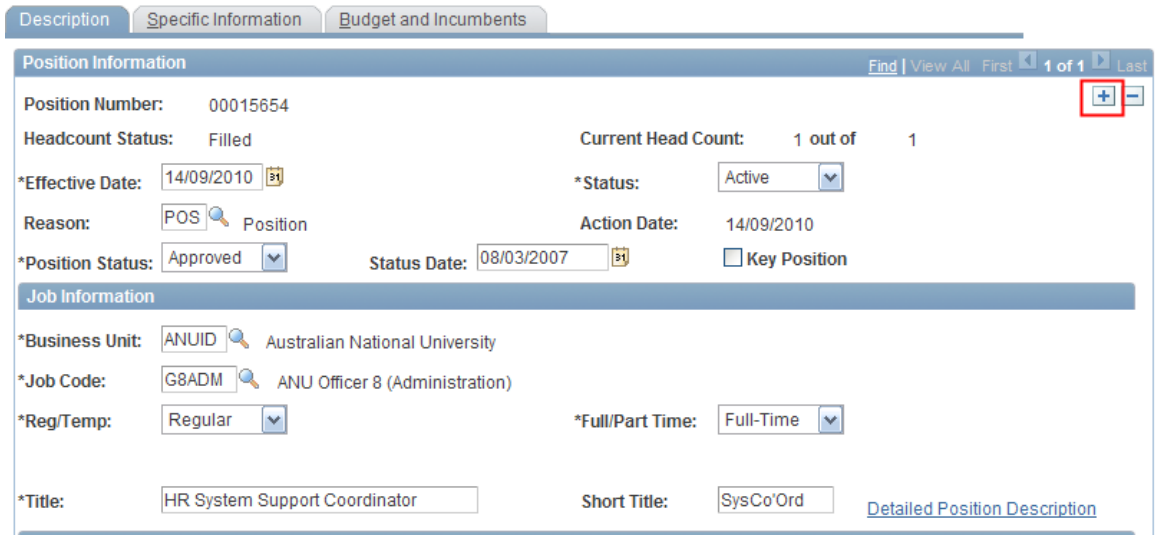

4.	Enter a new **Effective Date** – the Date that the 'Reports To' change is taking effect from. *Effective Date: 09/01/2012
5.	Enter the **Reason** as RPT – Change to Reports To Reason: RPT Change to Reports To
6.	In the '**Reports To'** field, update the position number to the new Reports To and press Tab on your keyboard. Reports To: 00000532 CEO
7.	Click the **Specific Information** Tab and tick the **Update Incumbents** checkbox.

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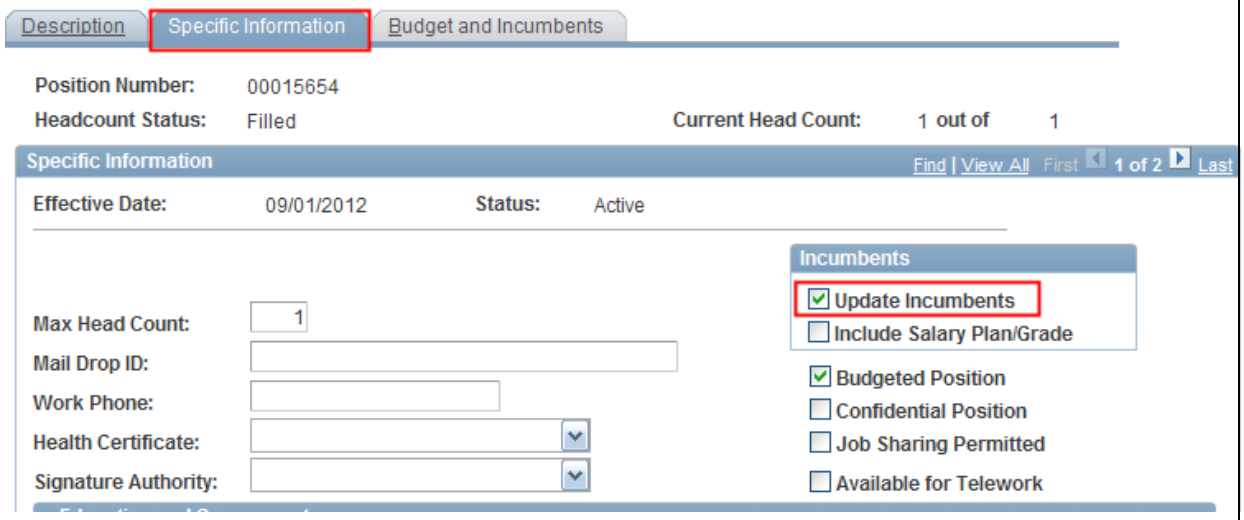
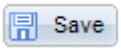
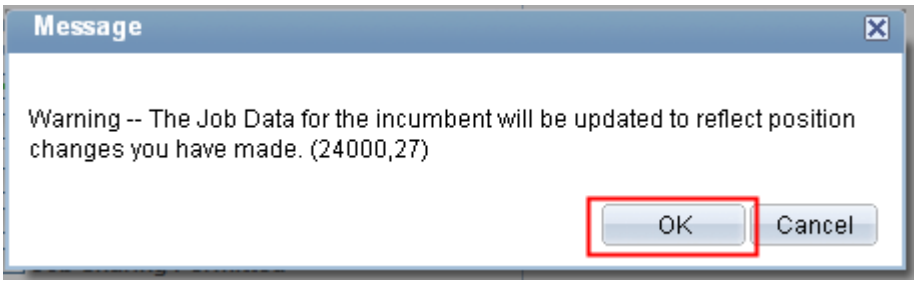


8. Click the **Save** button.



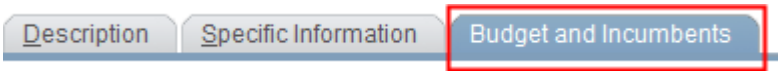
9. You will receive a warning telling you that the Job Data for the Incumbent will be updated. Click OK



10. If no further errors are received then you have successfully updated the **Reports To** for the position.

If you encounter the "Unable to Update Incumbents Job Data" error, proceed to the **Manually Update Job Data** section of this document.

11. Check the persons **Job Data** by clicking on the **Budget and Incumbents** tab. It is important to check the persons Job Data to make sure the change has gone through.



12. In the **Current Incumbents** section click the **Job Data** link. This will transfer you straight to the Job

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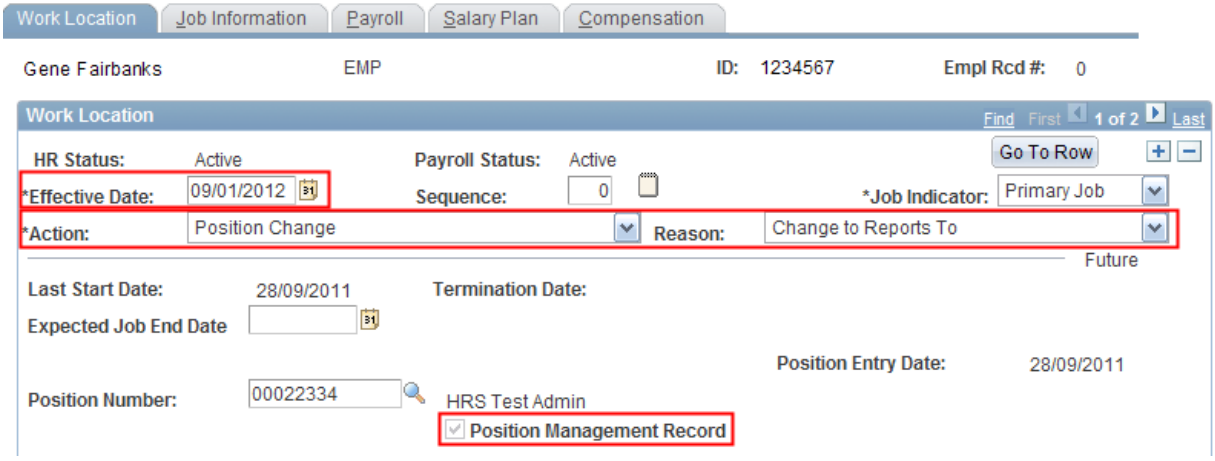
	Data for the Incumbent. You can also navigate there – Main Menu>Workforce Administration>Job Information>Job Data
13.	Check that the Position Data row you just entered has been recorded. Where there are future dated rows you may need to use the arrows to scroll through the rows. You are looking for a row with the same **Effective Date** and an **Action/Reason** of Position- Change to Reports To. The **Position Management** checkbox will also be ticked. 
14.	Click the **Job Information** tab. This page will display the details of the 'Reports To'/Supervisor

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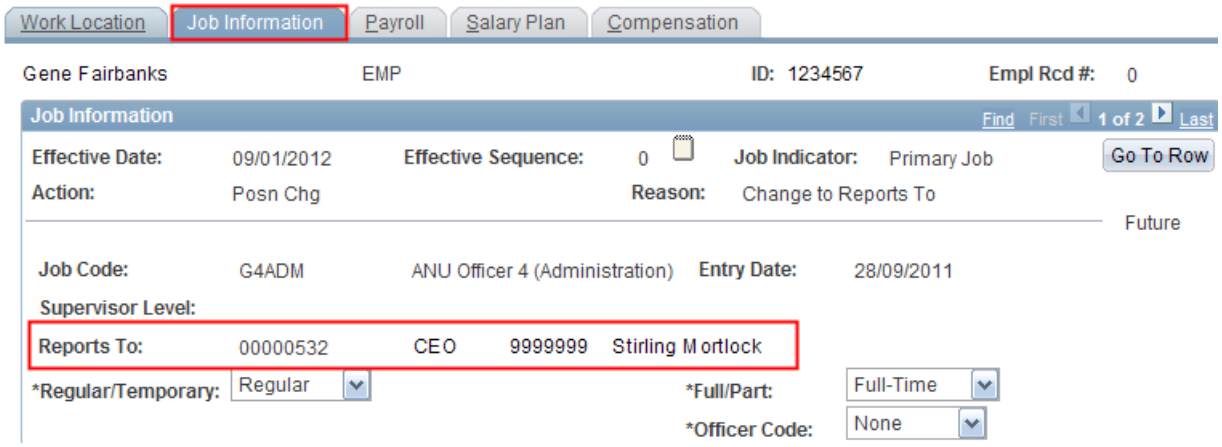
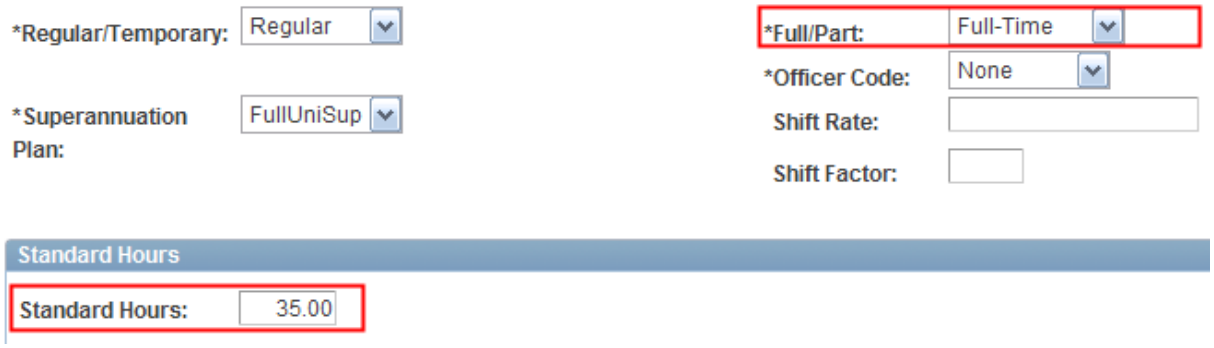


15. On this page you also need to check the **Full/Part time** indicator and the **Standard hours**. Every time a position is updated and Job Data is subsequently refreshed the Full/Part time indicator and standard hours get refreshed from Position Data. **It is important that you check this especially if the person works part-time.**



If the indicator and hours are incorrect you will need to insert a new row with the same effective date and sequence 1, and then update the relevant details.

16. Click the **Salary Plan** Tab and check that the **Salary Grade** and **Step** is correct.

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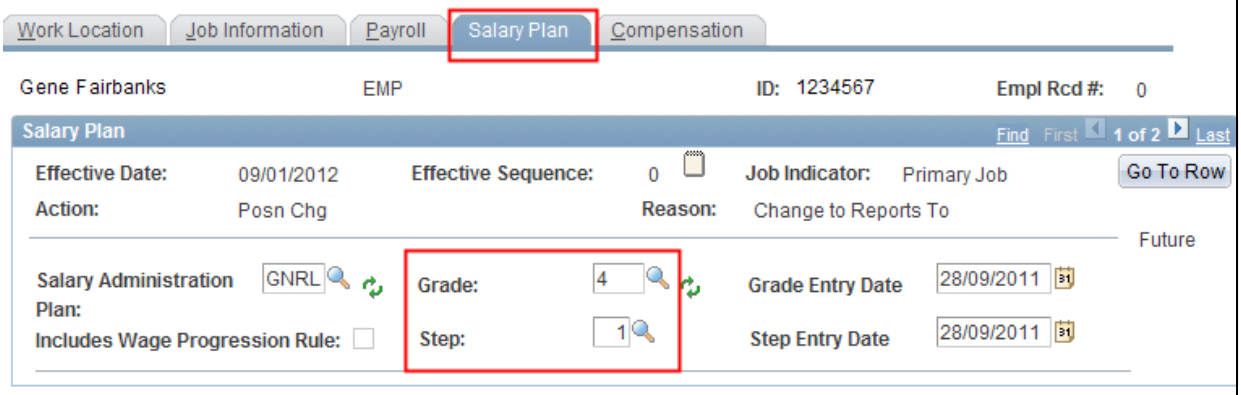
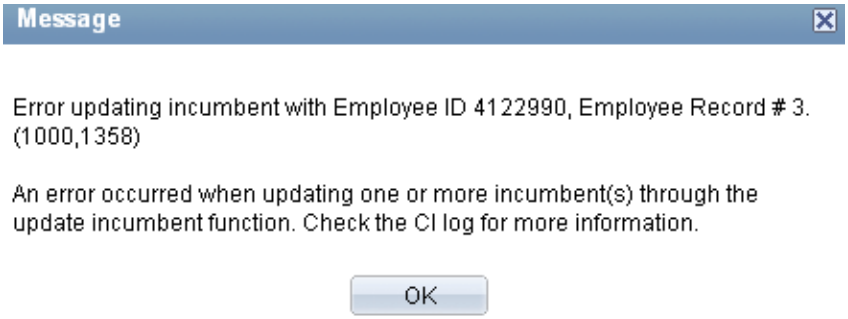
	 If it is all correct you can exit Job Data.
17.	**End of Procedure.**

Manually Update Job Data

Occasionally an error is received when updating Position Data indicating that the Update Incumbents has failed.



This error occurs in rare circumstances and usually is due to a change in the Salary Administration Plan.

When this error occurs it is necessary to manually update the incumbents Job Data. Follow the steps below to fix.

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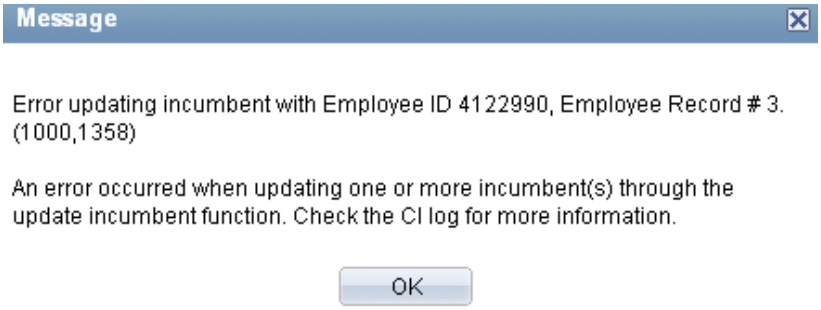
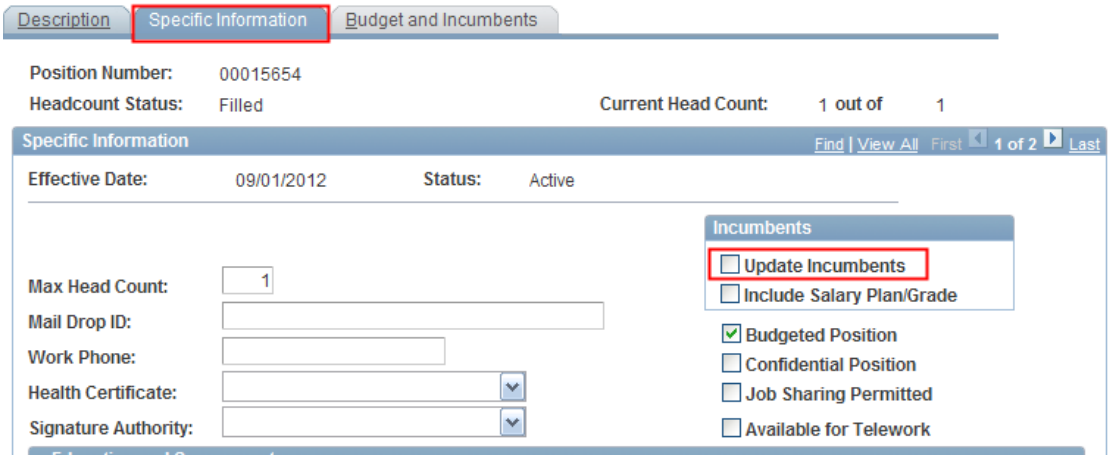
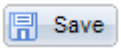
1.	**Error Received.**  When the error is received the changes will not save until you un-tick the Update Incumbents button.
2.	In Position Data click the Update Incumbents button to un-tick the checkbox. 
3.	Click the **Save** button. 
4.	You will receive a warning message saying that the incumbents Job Data will not be updated.

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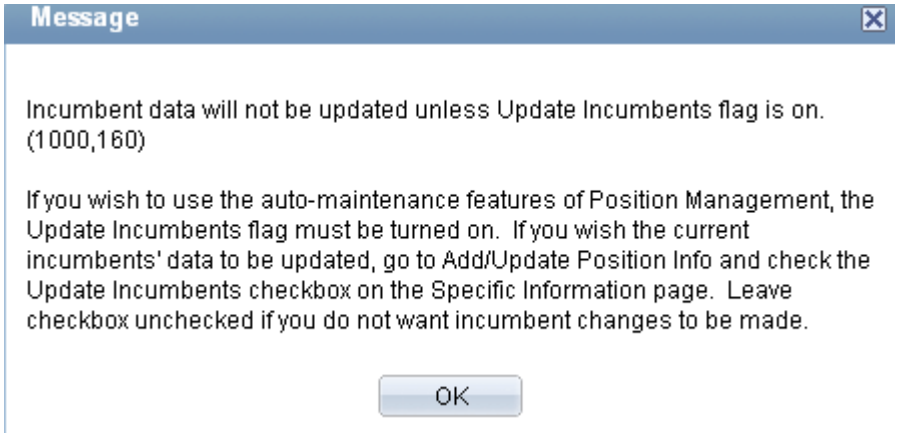
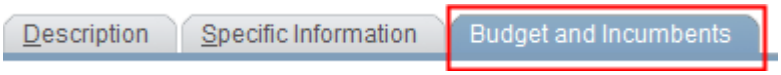


Click OK to continue with the save. Wait for the save to be successful before moving on.

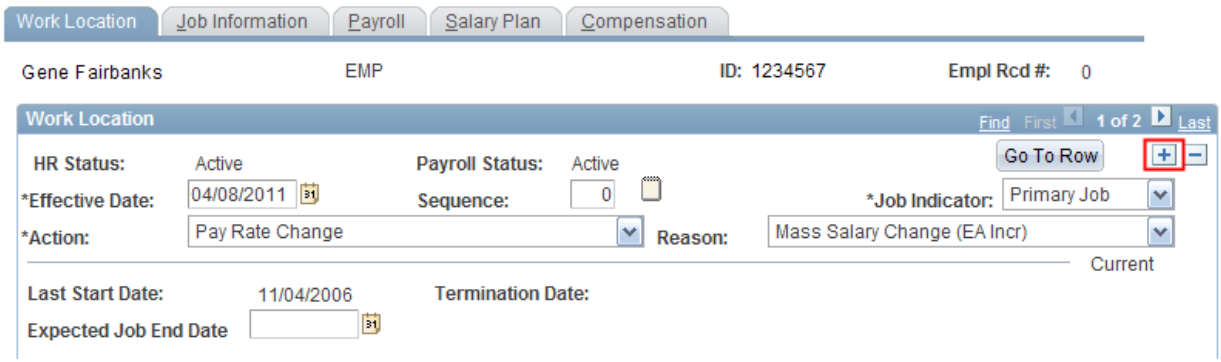
5. **Update Job Data.** Click on the **Budget and Incumbents** tab.



6. In the **Current Incumbents** section click the **Job Data** link. This will transfer you straight to the Job Data for the Incumbent.

You can also navigate there – Main Menu>Workforce Administration>Job Information>Job Data

7. Insert a new row by pressing the Plus button in the upper right hand corner of the page.



8. Enter a new **Effective Date** – the Date that the 'Reports To' change is taking effect from and

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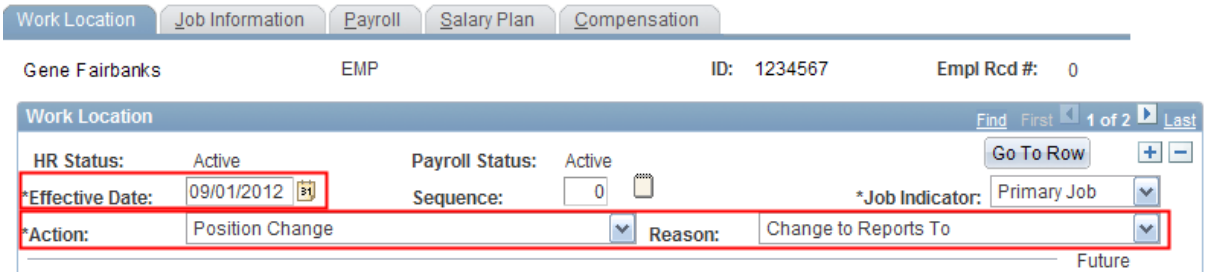
	corresponding to the Date entered in Position Information. *Effective Date: 09/01/2012
9.	Enter an **Action –** Select **Position Change** from the drop down menu and a **Reason** – Select **Change to Reports To** from the drop down menu. 
10.	To make sure that Job Data refreshes the position information we need to force it to look at Position Information again. To do this, note the **Position Number** and then delete it from the field and press tab on the keyboard. Position Number: 00022334 HRS Test Admin Note position number 22334 Position Number: Position details cleared
11.	Re-enter the **Position Number** and press tab on the keyboard. This forces Job Data to look back at the position information for this number and bring across current details. Position Number: 00022334 HRS Test Admin
12.	Click the **Job Information** tab. This page will display the details of the 'Reports To'/Supervisor - check that they are bringing back the updated details.

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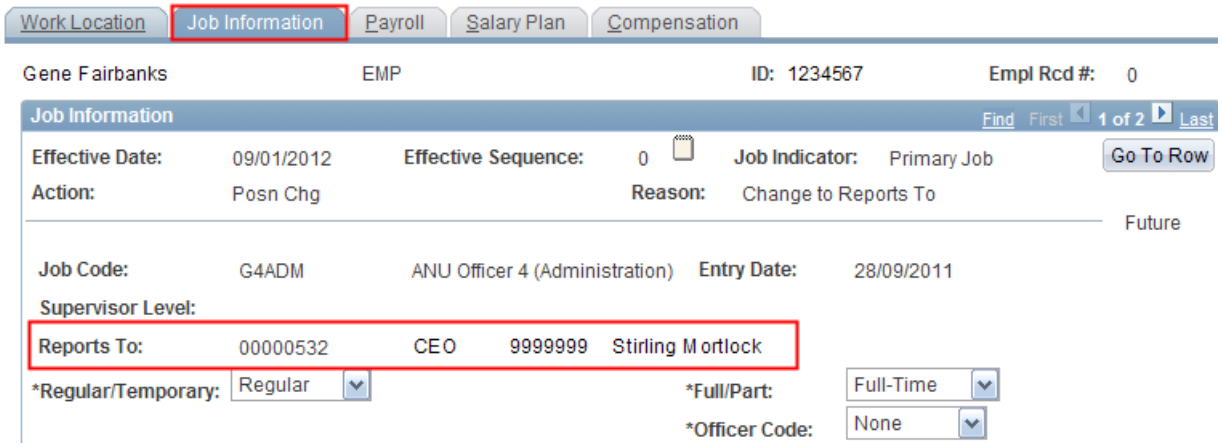

13. Check the **Full/Part time indicator** is correct. Update if necessary.

Even when a person is working part-time, the position will be set up as fulltime. When Job Data is refreshed from position it will bring across the fulltime status of the position. For this reason it is important to check the indicator and update, especially if the person only works part-time.

14. Check the **Standard Hours** is correct. Update if necessary.

Even when a person works part-time hours the position will be set up as standard fulltime hours – 35hrs/week. When Job Data is refreshed from position it will bring across the standard fulltime hours from the position. For this reason it is important to check the standard hours and update, especially if the person works part-time hours.

15. Click the **Salary Plan** Tab. Re-enter the **Step** here. If you are unsure of what the step should be use the arrows in the top-right of the **Salary Plan** group box to scroll back to the previous row to check.

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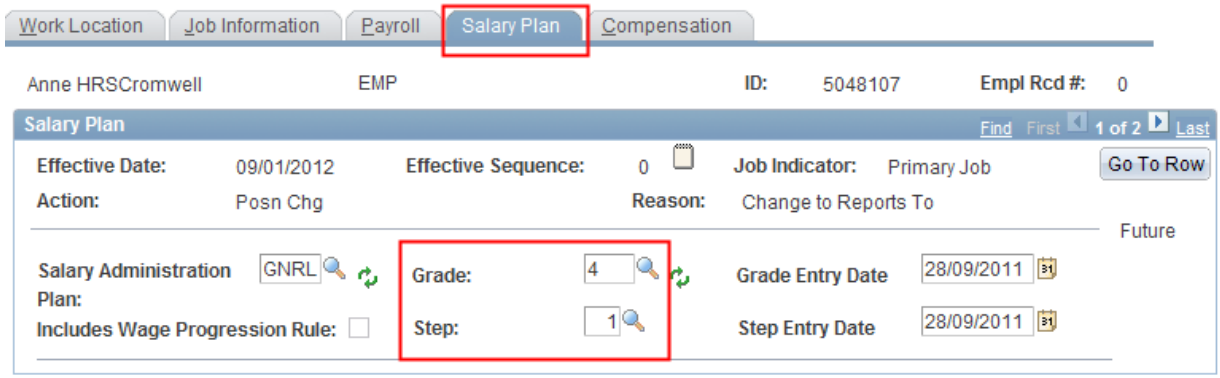
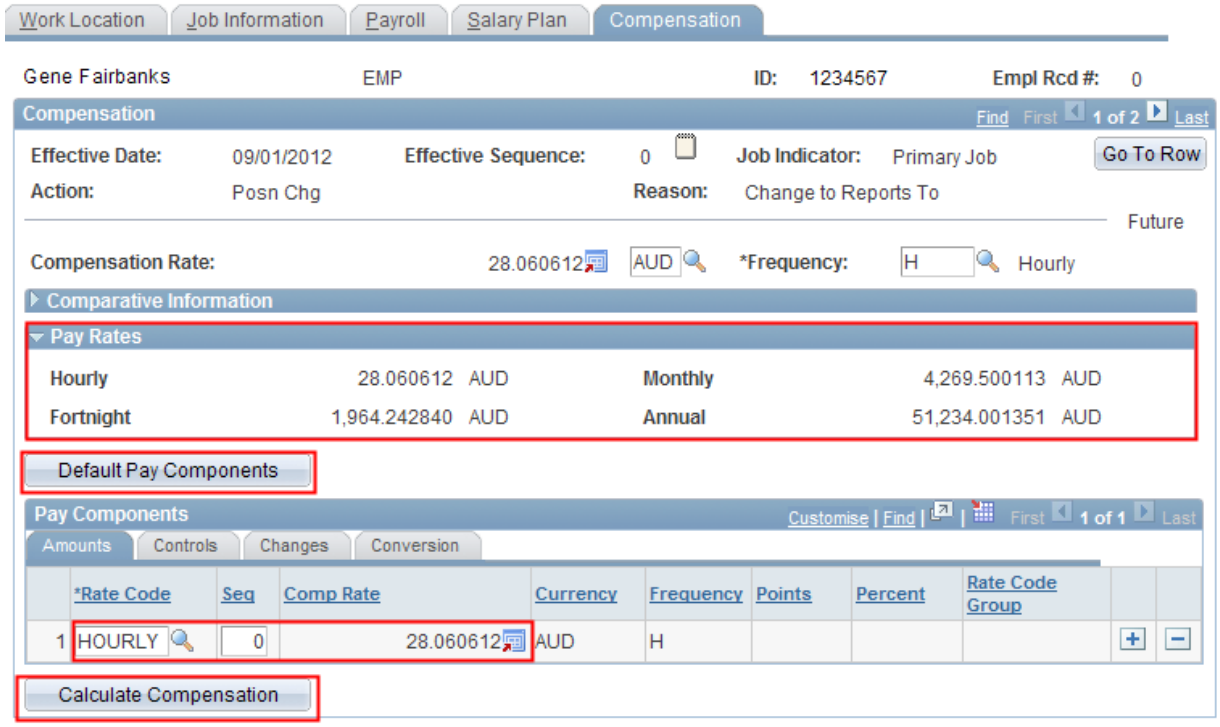
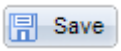


16. Click the **Compensation** Tab and check that the **Compensation Rates** are correct. If you believe the compensation rates are incorrect click the **Default Pay Components** button. This will bring back the rates for the Salary Grade and Step entered on the Salary Plan tab.



17. Click the **Save** button.



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18.	**End of Procedure.**

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