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## 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.

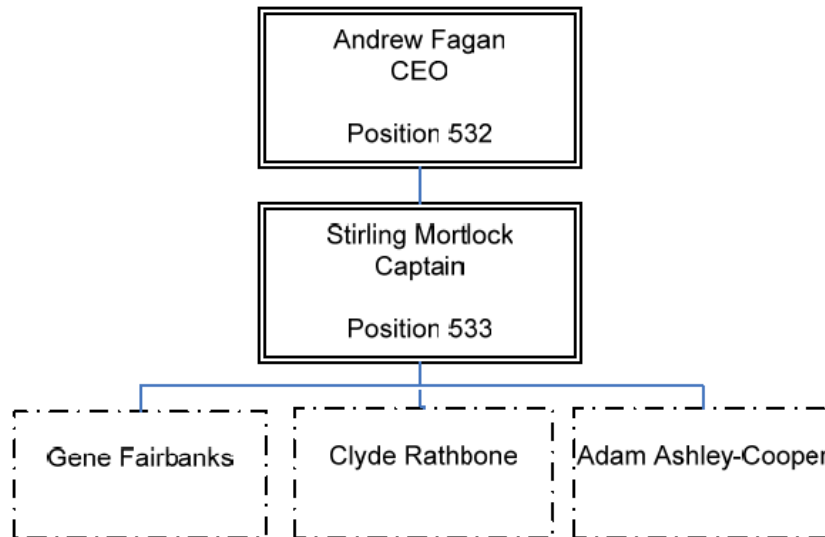
When a staff member does not have a supervisor in HRMS all leave and training applications, once submitted by the staff member, bounce to HR Systems instead of being sent to the relevant supervisor which can result in a delay in applications being approved. This can be simply fixed by ensuring that all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



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

Work Location
Job Information
Payroll
Salary Plan
Compensation

Gene Fairbanks      EMP      ID: 1234567      Empl Rcd #: 0

Work Location Find First 1 of 25 Last

HR Status: Active      Payroll Status: Active      Go To Row + -

\*Effective Date: 04/08/2011      Sequence: 0      \*Job Indicator: Primary Job

\*Action: Pay Rate Change      Reason: Mass Salary Change (EA Incr)      Current

Last Start Date: 11/04/2006      Termination Date:

Expected Job End Date:

Position Number: 00015654      HR System Support Coordinator      Position Entry Date: 23/07/2009

Position Management Record

**Add/Update Position Info**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

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

Position Number: begins with 15654

Description: begins with

Position Status: =

Business Unit: begins with

Department: begins with

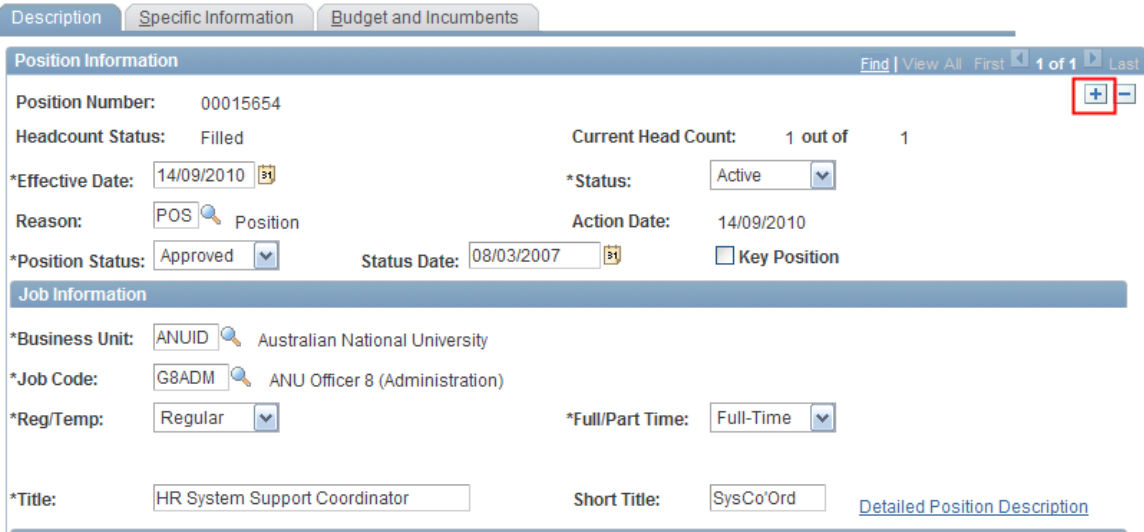



Job Code: begins with

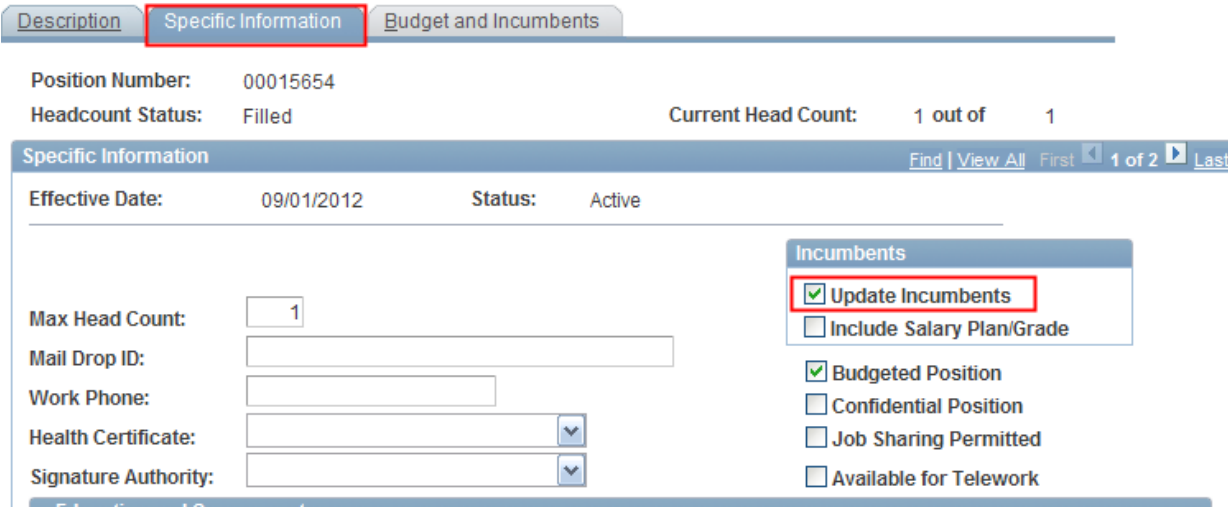
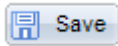
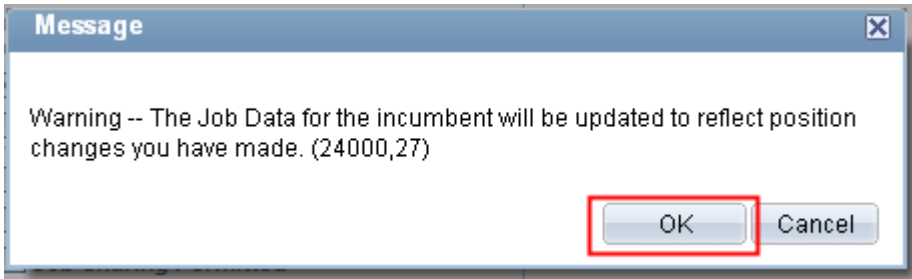
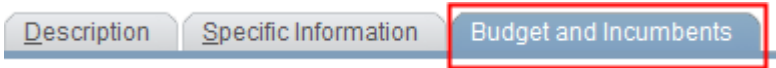
Reports To Position Number: begins with

Include History     Correct History     Case Sensitive

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

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

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

	
<p>8.</p>	<p>Click the <b>Save</b> button.</p> 
<p>9.</p>	<p>You will receive a warning telling you that the Job Data for the Incumbent will be updated. Click OK</p> 
<p>10.</p>	<p>If no further errors are received then you have successfully updated the <b>Reports To</b> for the position.</p> <p>If you encounter the “<b>Unable to Update Incumbents Job Data</b>” error, proceed to the <b>Manually Update Job Data</b> section of this document.</p>
<p>11.</p>	<p>Check the persons <b>Job Data</b> by clicking on the <b>Budget and Incumbents</b> tab. It is important to check the persons Job Data to make sure the change has gone through.</p> 
<p>12.</p>	<p>In the <b>Current Incumbents</b> section click the <b>Job Data</b> link. This will transfer you straight to the Job</p>

Data for the Incumbent.

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

Current Incumbents					
Empl ID	Empl Rcd#	Full/Part	Std Hrs/Wk	Job Data	Name
1234567	0	Full-Time	35.00	<b>Job Data</b>	Gene Fairbanks

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.

Work Location | Job Information | Payroll | Salary Plan | Compensation

Gene Fairbanks EMP ID: 1234567 Empl Rcd #: 0

Work Location Find First 1 of 2 Last

HR Status: Active Payroll Status: Active Go To Row + -

\*Effective Date: 09/01/2012 Sequence: 0 \*Job Indicator: Primary Job

\*Action: Position Change Reason: Change to Reports To

Last Start Date: 28/09/2011 Termination Date: Future

Expected Job End Date

Position Number: 00022334 HRS Test Admin

Position Management Record

14.

Click the **Job Information** tab. This page will display the details of the 'Reports To'/Supervisor

Work Location	Job Information	Payroll	Salary Plan	Compensation
Gene Fairbanks	EMP	ID: 1234567	Empl Rcd #: 0	
<b>Job Information</b> <span style="float:right">Find First 1 of 2 Last</span>				
Effective Date:	09/01/2012	Effective Sequence:	0	Job Indicator: Primary Job <span>Go To Row</span>
Action:	Posn Chg	Reason:	Change to Reports To	Future
Job Code:	G4ADM	ANU Officer 4 (Administration)	Entry Date:	28/09/2011
Supervisor Level:				
Reports To:	00000532	CEO	9999999	Stirling Mortlock
*Regular/Temporary:	Regular	*Full/Part:	Full-Time	
		*Officer Code:	None	

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.**

*Regular/Temporary:	Regular	*Full/Part:	Full-Time
*Superannuation Plan:	FullUniSup	*Officer Code:	None
		Shift Rate:	
		Shift Factor:	

**Standard Hours**

Standard Hours:	35.00
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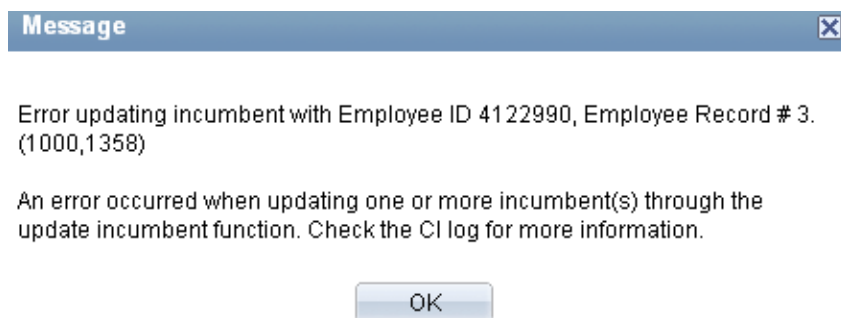
If the indicator and hours are incorrect you will need to insert a new row with the same effective date and sequence 1, and then update the relevant details.

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

	<div style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;"> <span style="border: 1px solid black; padding: 2px;">Work Location</span> <span style="border: 1px solid black; padding: 2px;">Job Information</span> <span style="border: 1px solid black; padding: 2px;">Payroll</span> <span style="border: 2px solid red; padding: 2px; font-weight: bold;">Salary Plan</span> <span style="border: 1px solid black; padding: 2px;">Compensation</span> </p> <p>Gene Fairbanks                      EMP                      ID: 1234567                      Empl Rcd #: 0</p> <p style="background-color: #e0e0e0; padding: 2px;"><b>Salary Plan</b> <span style="float: right;">Find First 1 of 2 Last</span></p> <p> <b>Effective Date:</b> 09/01/2012      <b>Effective Sequence:</b> 0      <b>Job Indicator:</b> Primary Job      <span style="float: right;">Go To Row</span>  <b>Action:</b> Posn Chg                      <b>Reason:</b> Change to Reports To         </p> <hr/> <p> <b>Salary Administration</b> GNRL      <b>Grade:</b> 4      <b>Grade Entry Date:</b> 28/09/2011  <b>Plan:</b>                      <b>Step:</b> 1      <b>Step Entry Date:</b> 28/09/2011  <b>Includes Wage Progression Rule:</b> <input type="checkbox"/> </p> </div> <p>If it is all correct you can exit Job Data.</p>
17.	<p><b>End of Procedure.</b></p>

## 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.



1. **Error Received.**

**Message** ✕

Error updating incumbent with Employee ID 41 22990, Employee Record # 3. (1000,1358)

An error occurred when updating one or more incumbent(s) through the update incumbent function. Check the CI log for more information.

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.

Description **Specific Information** Budget and Incumbents

Position Number: 00015654  
Headcount Status: Filled      Current Head Count: 1 out of 1

**Specific Information** Find | View All | First 1 of 2 Last

Effective Date: 09/01/2012      Status: Active

Max Head Count:

Mail Drop ID:

Work Phone:

Health Certificate:

Signature Authority:

**Incumbents**

Update Incumbents

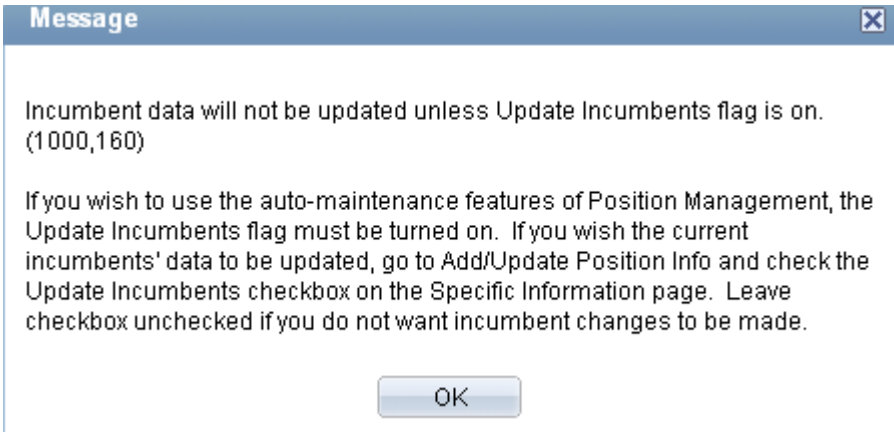
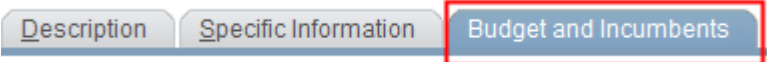

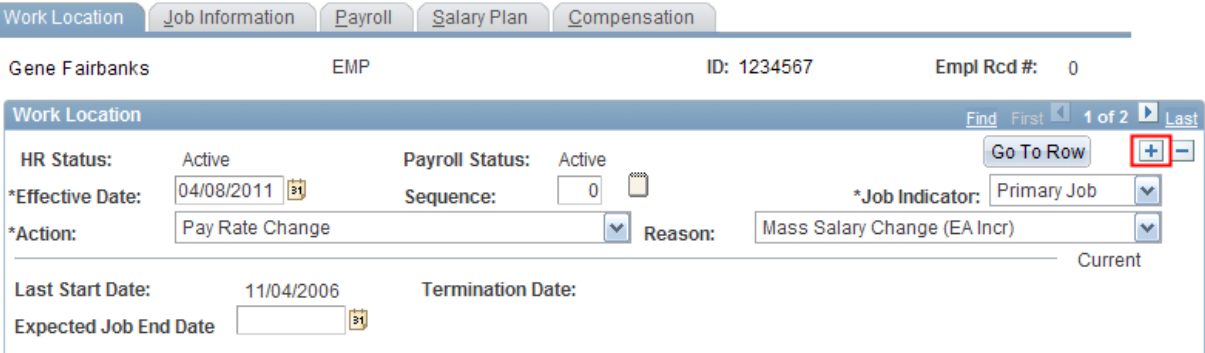
Include Salary Plan/Grade


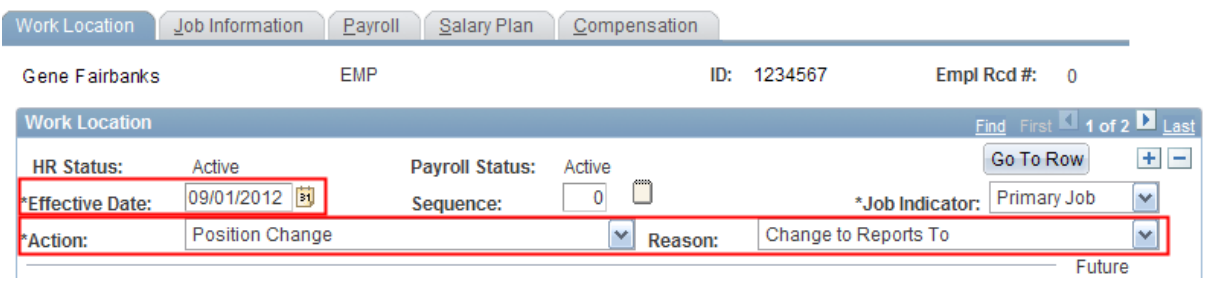



Budgeted Position

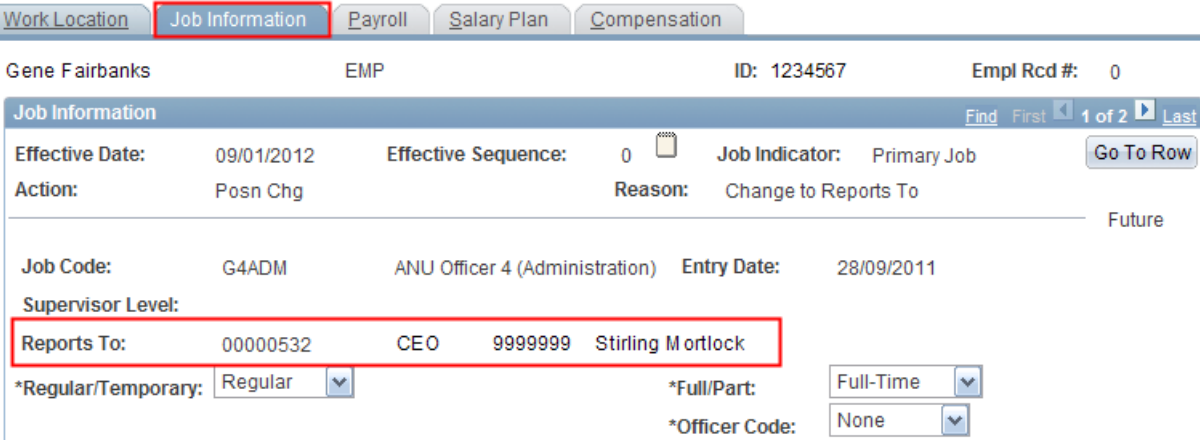


Confidential Position

Job Sharing Permitted

Available for Telework
3. Click the **Save** button.
4. You will receive a warning message saying that the incumbents Job Data will not be updated.

	 <p>Click OK to continue with the save. Wait for the save to be successful before moving on.</p>												
5.	<p><b>Update Job Data.</b> Click on the <b>Budget and Incumbents</b> tab.</p> 												
6.	<p>In the <b>Current Incumbents</b> section click the <b>Job Data</b> link. This will transfer you straight to the Job Data for the Incumbent.</p> <p>You can also navigate there – Main Menu&gt;Workforce Administration&gt;Job Information&gt;Job Data</p>  <table border="1" data-bbox="280 1245 1503 1402"> <thead> <tr> <th>Empl ID</th> <th>Empl Rcd#</th> <th>Full/Part</th> <th>Std Hrs/Wk</th> <th>Job Data</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td>1234567</td> <td>0</td> <td>Full-Time</td> <td>35.00</td> <td><a href="#">Job Data</a></td> <td>Gene Fairbanks</td> </tr> </tbody> </table>	Empl ID	Empl Rcd#	Full/Part	Std Hrs/Wk	Job Data	Name	1234567	0	Full-Time	35.00	<a href="#">Job Data</a>	Gene Fairbanks
Empl ID	Empl Rcd#	Full/Part	Std Hrs/Wk	Job Data	Name								
1234567	0	Full-Time	35.00	<a href="#">Job Data</a>	Gene Fairbanks								
7.	<p>Insert a new row by pressing the Plus button in the upper right hand corner of the page.</p> 												
8.	<p>Enter a new <b>Effective Date</b> – the Date that the 'Reports To' change is taking effect from and</p>												

	<p>corresponding to the Date entered in Position Information.</p> <p><b>*Effective Date:</b> <input type="text" value="09/01/2012"/> </p>
<p>9.</p>	<p>Enter an <b>Action</b> – Select <b>Position Change</b> from the drop down menu and a <b>Reason</b> – Select <b>Change to Reports To</b> from the drop down menu.</p> 
<p>10.</p>	<p>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 <b>Position Number</b> and then delete it from the field and press tab on the keyboard.</p> <p><b>Position Number:</b> <input type="text" value="00022334"/>  HRS Test Admin <b>Note position number 22334</b></p> <p><b>Position Number:</b> <input type="text"/>  <b>Position details cleared</b></p>
<p>11.</p>	<p>Re-enter the <b>Position Number</b> 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.</p> <p><b>Position Number:</b> <input type="text" value="00022334"/>  HRS Test Admin</p>
<p>12.</p>	<p>Click the <b>Job Information</b> tab. This page will display the details of the 'Reports To'/Supervisor - check that they are bringing back the updated details.</p>

	
<p>13.</p>	<p>Check the <b>Full/Part time indicator</b> is correct. Update if necessary.</p> <p>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.</p> 
<p>14.</p>	<p>Check the <b>Standard Hours</b> is correct. Update if necessary.</p> <p>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.</p> 
<p>15.</p>	<p>Click the <b>Salary Plan</b> Tab. Re-enter the <b>Step</b> here. If you are unsure of what the step should be use the arrows in the top-right of the <b>Salary Plan</b> group box to scroll back to the previous row to check.</p>

Work Location | Job Information | Payroll | **Salary Plan** | Compensation

Anne HRSCromwell EMP ID: 5048107 Empl Rcd #: 0

**Salary Plan** Find First 1 of 2 Last

Effective Date: 09/01/2012 Effective Sequence: 0 Job Indicator: Primary Job **Go To Row**

Action: Posn Chg Reason: Change to Reports To Future

Salary Administration GNRL Grade: 4 Grade Entry Date 28/09/2011

Plan: Includes Wage Progression Rule:  Step: 1 Step Entry Date 28/09/2011

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.

Work Location | Job Information | Payroll | Salary Plan | **Compensation**

Gene Fairbanks EMP ID: 1234567 Empl Rcd #: 0

**Compensation** Find First 1 of 2 Last

Effective Date: 09/01/2012 Effective Sequence: 0 Job Indicator: Primary Job **Go To Row**

Action: Posn Chg Reason: Change to Reports To Future

Compensation Rate: 28.060612 AUD \*Frequency: H Hourly

Comparative Information

Pay Rates			
Hourly	28.060612 AUD	Monthly	4,269.500113 AUD
Fortnight	1,964.242840 AUD	Annual	51,234.001351 AUD

**Default Pay Components**

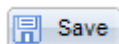
Pay Components Customise Find First 1 of 1 Last

*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 HOURLY	0	28.060612	AUD	H			

**Calculate Compensation**

17.

Click the **Save** button.



18.

**End of Procedure.**