

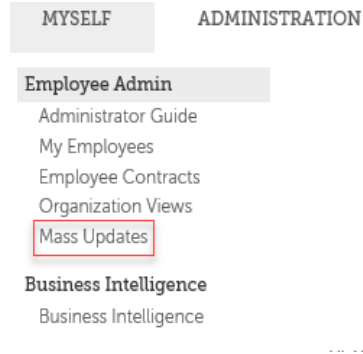
Assigning Employees to a New Manager

Overview: The **Mass Updates** function provides the ability to make changes to multiple employees at the same time. This job aid describes how the Employee Administrator can move two or more employees under the direction of a different manager.

Note: Use this function whenever you make a change to an employee’s supervisor. Making a change here, if only for a single employee, ensures you skip the authorization process.

Select Employees to Move

1. Click **Menu**.
2. Select **Mass Updates** from the **Administration menu**.



3. Ensure **Supervisor Change** is showing in the **Actions box**. Click **OK**.



Add Mass Update

(ca)Mass Updates provide the ability to make changes to multiple employees at the same time. To perform a r

Find by From To

Actions

4. The Add Mass Update screen displays. Click **Add Employees**.

Add Mass Update
Michael Hotrum - 3000147 - ZTEST

Select Employees

Define Changes

Summary

Select Employees

Click "Add Employees" button to select employees for which changes will apply.

Selected Employees

Actions

0 Record(s) selected | |

<input type="checkbox"/>	Employee Name	Employee Number	Supervisor	Location	Last Job Change Date
No records found					

5. Click the arrowhead beside the **Find by field** to see search criteria list. In this example, last name was selected as the search criteria.

Add Employees

Select employees to include in this update

Find by starts with

Filtered by 'Salary Or Hourly' - is

0 Record(s) selected | |

<input type="checkbox"/>	Employee Name	Employee Number	Location	Supervisor	Job Group	Job	Company	Div/District	Resp/Site	Department	Region	Pay Group	Status
No records found													

6. Type in the last name of the employee.
7. Click **Search**.

8. Click the **box** beside the name of the employee you want to move.
9. Click the **green checkmark (OK)** at the top of the screen.

Add Employees

Select employees to include in this update

Find by: Last Name starts with Mytest Search

Filtered by: Last Name - starts with Mytest [Clear Filters](#)

1 Record(s) selected | [Select all 5](#) | [Deselect all](#)

<input type="checkbox"/>	Employee Name	Employee Number	Location	Supervisor	Job Group	Job	Company	Div/District	Resp/Site	Department
<input checked="" type="checkbox"/>	Mytest, Ash	3000166	Territorial Headquarters	Manager, Mary	Finance	Admin Asst Acctng	ZTEST	Territorial Headquarters	THQ General Operations	Administrative

10. Because you want to move several at once, click **Add Employees**. Repeat the above steps until all employees desired are selected.

Add Mass Update

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Select Employees

Define Changes

Summary

Select Employees

Click "Add Employees" button to select employees for which changes will apply.

Selected Employees

Actions [Add Employees](#) [Remove](#)

0 Record(s) selected | [Select all 1](#) | [Deselect all](#)

<input type="checkbox"/>	Employee Name	Employee Number	Supervisor	Location
<input type="checkbox"/>	Mytest, Ash	3000166	Manager, Mary	Territorial Headquarters

11. Once all desired employees are selected, click the **Next** button.

Add Mass Update

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Select Employees

Define Changes

Summary

Select Employees

Click "Add Employees" button to select employees for which changes will apply.

Selected Employees

Actions [Add Employees](#) [Remove](#)

0 Record(s) selected | [Select all 2](#) | [Deselect all](#)

<input type="checkbox"/>	Employee Name	Employee Number	Supervisor	Location
<input type="checkbox"/>	Mytest, Ash	3000166	Manager, Mary	Territorial Headquarters
<input type="checkbox"/>	Mytest, Kim	3000170	Manager, Mary	Territorial Headquarters

Select New Manager

12. Now select the new manager. Click the **magnifying glass** icon to see the employee list.

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Select Employees

Define Changes

Summary

Define Changes

Enter the details for this change.

Type Of Change: **Supervisor Change**

Current Supervisor: **Mary Manager**

New Supervisor:

Effective Date:

Change Reason:

← back

→ next

13. Search for the name of the new supervisor. In this example we chose to **Find by Last name**. Click **Search**.

https://tz12.ultipro.ca/pages/utility/USSuperFinder.aspx?USParams=hiddenID%3dcode_cti00_Content_frmMassUpd

Find by: Last name | starts with | | Search

Filtered by: Last name - starts with manager [Clear Filters] | Displaying all records

Name ^	Job	Location	Company	Country	⌵
manager, jane	Dietitian	Territorial Headquarters	ZTEST	Canada	
manager, jeri	Sr Staff Accountant	Territorial Headquarters	ZTEST	Canada	
Manager, Mary	Admin Manager	Territorial Headquarters	ZTEST	Canada	
MAnager, Steve	Outreach Manager	Territorial	ZTEST	Canada	

14. Click the desired name from the displayed list.

15. The name displays in the **New Supervisor** field.

16. Click on the calendar icon and select the **Effective start date**. When do you want this change to be applied? In this example we selected Aug 1.

Add Mass Update
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Select Employees

Define Changes

Summary

Define Changes

Enter the details for this change.

Type Of Change: **Supervisor Change**

Current Supervisor: **Mary Manager**

New Supervisor:

Effective Date:

Change Reason:

← back

→ next

17. For **Change Reason**, click the down arrow to select a choice.

18. Click **Next** in the top right corner.

19. The summary of your selections displays. If any errors, click **Back** to return to previous screens and edit.

Add Mass Update
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Select Employees

Define Changes

Summary

Summary

Submitted By: Hotrum, Michael

Type Of Change: Supervisor Change

Current Supervisor: Mary Manager

New Supervisor: jane manager

Effective Date: 08/01/2017

Change Reason: Reorganization

Selected Employee(s): 2 Employee(s)

← back

✓ submit

⊗ cancel

20. When ready to accept this supervisor change, click **Submit**.

21. The submission shows as In Progress.
There is no authorization required so in a few minutes it will change to Completed.

Add Mass Update

Submitted
Your Supervisor Change for 2 employees has been submitted.

Find by: Date/Time submitted From: To: MM/DD/YYYY Search

Actions: Supervisor Change OK

Date/Time Submitted	Update Type	Status	Submitted By	Effective Date	Employee Count
7/27/2017 2:41:52 PM	Supervisor Change	In Progress	Holtrum, Michael	08/01/2017	0

22. To check if the change took effect, search for one of the employees and view their **Employee Summary**. This example shows the change we made. Ash Mytest now has Jane Manager as her Supervisor.

Ash Mytest

Personal | Jobs | Time & Attendance | Pay | Benefits | Taxes | Documents

Employee Summary | Name, Address, and Telephone | Status/Key Dates | ROE | Contacts | Priv

Ash Mytest
Admin Asst Acctng (416) 567-6778

Job

Job	Pay group
11000006 - Admin Asst Acctng	TSAL - Test Salary
Status	Employee type
Active	REG - Regular
As of	Full/Part time
07/19/2017	Full Time
Supervisor	
jane manager	

NOTE: Send an email to UltiPro support through the Service desk email address asking that <this manager> become manager of <these employees>. This ensures the change takes effect in **Time and Attendance**.