

Assigning Employee(s) to a New Manager

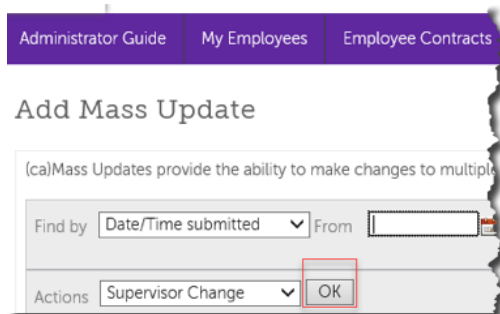
Overview: this job aid describes the Mass Update function, which is used by an Employee Administrator to move one or more employees from one supervisor (or manager) to another. Manager changes done using these steps do not trigger an approval workflow. **Note: this procedure should only be performed at the start of a new pay period.**

Select Employee(s) to Move

1. Click **Menu** then select **Mass Updates** from the **Administration** tab.



2. In the Add Mass Update window, select **Supervisor Change** from the **Actions** menu then click **OK**.



3. In the **Select Employees** ribbon, click the **Add Employees** button then use the search function to locate the employee or employees transferring to the new manager. To search employees by the name of the current manager, select **Supervisor First Name** or **Supervisor Last Name** from the **Find by** drop down list box.



- In the resulting employee list, place a check mark in the box to the left of each name and then click the green **OK** button at the top right. To continue the selection process, repeat Step 3 to locate all required employee names.

Add Employees OK

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	ZTEST	Territorial Headquarters	THQ General Operations	Administrat

- Click the **Next** button at the top right to continue.

Add Mass Update
Michael Hotrum - 3000147 - ZTEST

Select Employees Next

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

Select Manager to Assign

- In the **Define Changes** ribbon, click the magnifying glass icon then use the Search function to locate the new manager's name to be assigned. Click the manager's name from the resulting list to select it.

Add Mass Update
Michael Hotrum - 3000147 - ZTEST

Select Employees

Define Changes Define Changes

Summary

Enter the details for this change.

Type Of Change **Supervisor Change**

Current Supervisor **Mary Manager**

New Supervisor

Effective Date

Change Reason

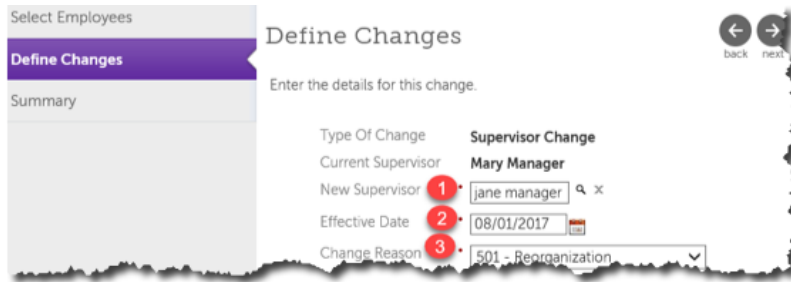
https://tz12.ultipro.ca/pages/utility/USSuperFinder.aspx?USParams=hiddenID%3dcode_ct100_Content

Find by Last name starts with manager Search

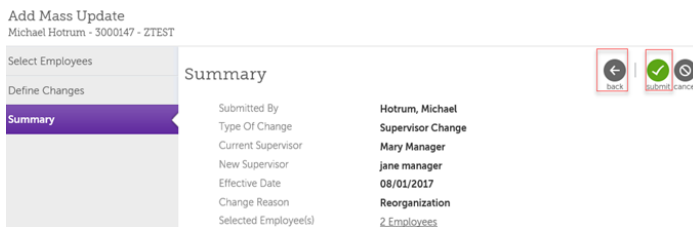
Filtered by Last name - starts with manager [Clear Filters] Displaying

Name	Job	Location	Company

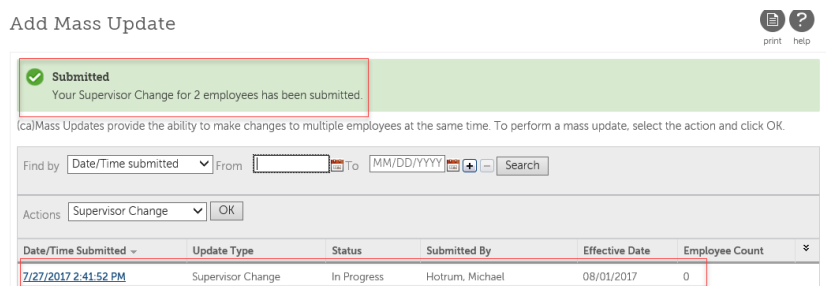
- Complete the remainder of the fields in the **Define Changes** window, including **Effective Date** and **Change Reason**. When complete, click the **Next** button.



- To ensure the selections are correct, review the entries shown in the **Summary** ribbon. To correct an error, click the **Back** button to return to the previous ribbons. Or, to proceed, click the **Submit** button.



- A confirmation window will appear, indicating an **In Progress** status. No authorization is required and the change will take effect within a few minutes.



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

- To confirm completion of the change, view the employee record for whom the change was made. The **Supervisor** field should reflect the name of the newly assigned manager.