

Change an Employee's Supervisor

Chapter 18

Change an Employee's Supervisor

Section Objectives

At the end of this section, you should be able to:

- Change an Employee's Supervisor

Change an Employee's Supervisor

The *Change Manager* form provides the ability for supervisors to reassign direct reports to a new supervisor and assign new direct reports to the supervisor.

ORACLE PRISM TRKS Supervisor

Change Manager

Effective Date 23-Oct-2009

Employee Name Supervisor B Student22
Organization Email Address
Manager Supervisor D Student22

Employee Number 123624
Department PRISM TRKS
Job Staff.Administrator.III

Reassign Direct Reports to a New Manager
You can assign all direct reports to the same new manager or make individual manager assignments below.

* Transfer Date 23-Oct-2009
(example: 23-Oct-2009)

New Manager
Assign to All

Effective Transfer Date	Direct Report's Manager	Direct Report	Job
23-Oct-2009	Student22, Supervisor B	Student22, Employee Z	Staff.Administrative Support.I
23-Oct-2009	Student22, Supervisor B	Student22, Employee A	Staff.Administrator.III
23-Oct-2009	Student22, Supervisor B	Student22, Employee B	Staff.Administrator.III
23-Oct-2009	Student22, Supervisor B	Student22, Employee F	Staff.Administrative Support.I
23-Oct-2009	Student22, Supervisor B	Student22, Employee G	Staff.Administrative Support.I
23-Oct-2009	Student22, Supervisor C	Student22, Employee J	Staff.Administrator.III
23-Oct-2009	Student22, Supervisor B	Student22, Employee K	Staff.Administrative Support.I
23-Oct-2009	Student22, Supervisor B	Student22, Employee N	Staff.Administrator.III
23-Oct-2009	Student22, Supervisor C	Student22, Employee O	Staff.Administrator.III
23-Oct-2009	Student22, Supervisor B	Student22, Employee S	Staff.Administrative Support.I

Current information is displayed which includes the Effective Date of the Assignment, Employee Name, Employee Number, E-mail Address, Department, Manager and Job.

Reassign Direct Reports to a New Manager

The Transfer Date (or effective date) may be the current date or a date in the future.

The transfer can be completed in two ways:

- The *Transfer Date* and new *Direct Report's Manager* can be individually assigned to the Direct Report.
- A specific *Transfer Date* is chosen and a *New Manager* can be assigned to all current direct reports on that effective date.

Assign New Direct Reports

New Direct Report(s) may be assigned to the manager using a specific Transfer Date.

Change an Employee's Supervisor

Change Manager: Review

[Cancel](#) [Printable Page](#) [Back](#) [Submit](#)

Effective Date 23-Oct-2009

Employee Name **Supervisor B Student22**
 Organization Email Address
 Manager **Supervisor D Student22**

Employee Number **123624**
 Department **PRISM TRKS**
 Job **Staff.Administrator.III**

Review your changes and, if needed, attach supporting documents.

Indicates Changed Items.

Reassigned Direct Reports

Worker Name	Job	Current Manager Name	Proposed Manager Name	Effective Transfer Date
Student22, Employee Z	Staff.Administrative Support.I	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009
Student22, Employee A	Staff.Administrator.III	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009
Student22, Employee B	Staff.Administrator.III	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009
Student22, Employee F	Staff.Administrative Support.I	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009
Student22, Employee G	Staff.Administrative Support.I	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009
Student22, Employee J	Staff.Administrator.III	Supervisor B Student22	Student22, Supervisor C	23-Oct-2009
Student22, Employee K	Staff.Administrative Support.I	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009
Student22, Employee N	Staff.Administrator.III	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009
Student22, Employee O	Staff.Administrator.III	Supervisor B Student22	Student22, Supervisor C	23-Oct-2009
Student22, Employee S	Staff.Administrative Support.I	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009

Additional Information

Attachments

To help approvers understand the request, you can attach supporting documents, images, or links to this action.

None [Add](#)

Approvers

Details	Line No	Approver	Approver Type	Order No	Category	Status	Delete
Show	1	Student22, Supervisor D	HR People	1	Approver		

[Add Adhoc Approver](#)

Comments to Approver

[Cancel](#) [Printable Page](#) [Back](#) [Submit](#)

- Once these are completed, the Professional User Interface (PRISM HR/Payroll system) is then updated to reflect these changes.
- No employee records are generated by these changes.

Further Information

The intent of this document is to provide a review of the most commonly required information for the purpose of completing PRISM TRKS timecards. Every effort has been made to keep this document up-to-date. However in all cases, the information cited throughout this document is governed by official University Policies, Procedures, and Staff Handbooks located at <http://www.bc.pitt.edu/policies/>.

Lab 1: Change an Employee's Supervisor

1. First, login to PRISM TRKS as SPVBXX.
2. Supervisor C will now be supervising Employees J & O. Change the Supervisor of Employee J StudentXX and Employee O StudentXX from Supervisor B StudentXX to Supervisor C StudentXX
3. Next, login to PRISMTRKS as SPVDXX
4. Since Supervisor A will be leaving the department, Supervisor D will reassign all employees from Supervisor A to Supervisor E until a new employee is hired.

Lab 1 Solutions: Change an Employee's Supervisor

ORACLE E-Business Suite

Logout Preferences Help

Logged In As SPVB22

Worklist (Full List) Edit Favorites

From Subject Sent

There are no notifications in this view.

TIP Vacation Rules - Redirect or auto-respond to notifications.

TIP Worklist Access - Specify which users can view and act upon your notifications.

Navigator (Edit Navigator)

- PRISM TRKS Supervisor
 - PRISM TRKS Time
 - All Actions
 - Manager Actions
 - Time Entry
 - Change Manager
 - Mass Time Card Approvals
 - Non-Exempt Account Distribution
 - Missing Timecard Information
 - Time Off Balance

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- Login as SPVBXX
- Select *PRISM TRKS Supervisor* responsibility
- Select the *Change Manager* link

ORACLE PRISM TRKS Supervisor

Diagnosics Home Logout Preferences Help

Change Manager (Cancel) (Back) (Next)

Effective Date 23-Oct-2009

Employee Name Supervisor B Student22 Employee Number 123624

Organization Email Address Manager Supervisor D Student22 Department PRISM TRKS

Job Staff.Administrator.III

Reassign Direct Reports to a New Manager

You can assign all direct reports to the same new manager or make individual manager assignments below.

* Transfer Date 23-Oct-2009 (example: 23-Oct-2009)

New Manager [Text Field] (Flashlight Find icon)

Assign to All

Effective Transfer Date	Direct Report's Manager	Direct Report	Job
23-Oct-2009	Student22, Supervisor B	Student22, Employee Z	Staff Administrative Support.I
23-Oct-2009	Student22, Supervisor B	Student22, Employee A	Staff Administrator.III
23-Oct-2009	Student22, Supervisor B	Student22, Employee B	Staff Administrator.III
23-Oct-2009	Student22, Supervisor B	Student22, Employee F	Staff Administrative Support.I
23-Oct-2009	Student22, Supervisor B	Student22, Employee G	Staff Administrative Support.I
23-Oct-2009	Student22, Supervisor C	Student22, Employee J	Staff Administrator.III
23-Oct-2009	Student22, Supervisor B	Student22, Employee K	Staff Administrative Support.I
23-Oct-2009	Student22, Supervisor B	Student22, Employee N	Staff Administrator.III
23-Oct-2009	Student22, Supervisor C	Student22, Employee O	Staff Administrator.III
23-Oct-2009	Student22, Supervisor B	Student22, Employee S	Staff Administrative Support.I

Previous 1-10 Next 10

- Find Employee J StudentXX in the *Reassign Direct Reports to a New Manager* table.
- In the *Direct Report's Manager* field, delete Supervisor B's name and replace with Supervisor C StudentXX.
 - Type all or part of Supervisor C's name and tab, or use the *Flashlight Find* icon
- Repeat steps 1-3 for Employee O StudentXX
- Click the *Next* button in the top right corner.

Lab 1 Solutions: Change an Employee's Supervisor

Change Manager: Review

[Cancel](#) [Printable Page](#) [Back](#) [Submit](#)

Effective Date 23-Oct-2009

Employee Name **Supervisor B Student22**
 Organization Email Address
 Manager **Supervisor D Student22**

Employee Number **123624**
 Department **PRISM TRKS**
 Job **Staff.Administrator.III**

Review your changes and, if needed, attach supporting documents.

Indicates Changed Items.

Reassigned Direct Reports

Worker Name	Job	Current Manager Name	Proposed Manager Name	Effective Transfer Date
Student22, Employee Z	Staff.Administrative Support.I	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009
Student22, Employee A	Staff.Administrator.III	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009
Student22, Employee B	Staff.Administrator.III	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009
Student22, Employee F	Staff.Administrative Support.I	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009
Student22, Employee G	Staff.Administrative Support.I	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009
Student22, Employee J	Staff.Administrator.III	Supervisor B Student22	Student22, Supervisor C	23-Oct-2009
Student22, Employee K	Staff.Administrative Support.I	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009
Student22, Employee N	Staff.Administrator.III	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009
Student22, Employee O	Staff.Administrator.III	Supervisor B Student22	Student22, Supervisor C	23-Oct-2009
Student22, Employee S	Staff.Administrative Support.I	Supervisor B Student22	Student22, Supervisor B	23-Oct-2009

Additional Information

Attachments

To help approvers understand the request, you can attach supporting documents, images, or links to this action.

None [\(Add\)](#)

Approvers

Details	Line No	Approver	Approver Type	Order No	Category	Status	Delete
Show	1	Student22, Supervisor D	HR People	1	Approver		

[Add Adhoc Approver](#)

Comments to Approver

[Cancel](#) [Printable Page](#) [Back](#) [Submit](#)

- Supervisor C's name should appear in the *Proposed manager* column beside Employee O & Employee J's names.
- Click the *Submit* button to process the changes.

Confirmation

Your changes have been submitted for manager approval.

[Home](#)

- A *Confirmation* page should appear confirming that the changes have been submitted to Supervisor B's supervisor for approval.
- Click on *Home* button to return to the *PRISM Homepage*

Lab 1 Solutions: Change an Employee's Supervisor

ORACLE® E-Business Suite

Diagnostics | Logout | Preferences | Help
Logged In As SPVD20

Worklist Full List

Switch User

From	Subject	Sent
There are no notifications in this view.		

[TIP Vacation Rules](#) - Redirect or auto-respond to notifications.
[TIP Worklist Access](#) - Specify which users can view and act upon your notifications.

Navigator Edit Navigator

PRISM TRKS Supervisor

PRISM TRKS Time

PRISM TRKS Supervisor

- All Actions
- Manager Actions
- Time Entry
- Change Manager
- Mass Time Card Approvals
- Non-Exempt Account Distribution
- Missing Timecard Information
- Time Off Balance

Reports

- Run
- View

Diagnostics | Logout | Preferences | Help

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- Login as SPVDXX
- Select *PRISM TRKS Supervisor* responsibility
- Select the *Manager Actions* link



Diagnostics | Home | Logout | Preferences | Help

Manager Actions: People in Hierarchy

Focus	Name	Assignment Number	Job	Department	Action	Details
+	Supervisor D Student20					
+	Supervisor A Student20	125482	Staff Administrator.III	PRISM TRKS		
	Employee C Student20	124102	Staff Administrator.III	PRISM TRKS		
	Employee P Student20	124882	Staff Administrative Support.I	PRISM TRKS		
+	Supervisor B Student20	123622	Staff Administrator.III	PRISM TRKS		
	Supervisor C Student20	123682	Staff Administrator.III	PRISM TRKS		
+	Supervisor E Student20	123742	Staff Administrator.III	PRISM TRKS		
	TCAAdmin A Student20	123862	Staff Administrator.III	PRISM TRKS		

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- Find Supervisor A StudentXX in the *Manager Actions: People in Hierarchy* form and click on the plus sign to view direct reports, Employee C StudentXX and Employee P StudentXX.
- Click the *Action* icon across from Supervisor A StudentXX

Lab 1 Solutions: Change an Employee's Supervisor

ORACLE PRISM TRKS Supervisor

Diagnostics Home Logout Preferences Help

Manager Actions: People in Hierarchy >
Manager Actions: Perform Action

Effective Date 27-Oct-2009 Back

Employee Name Supervisor A Student20 Employee Number 125482
Organization Email Address npatuc@bc.pitt.edu Department PRISM TRKS
Manager Supervisor D Student20 Job Staff.Administrator.III

Available Actions

Select Action: Start	Awaiting Approval Of Others
<input checked="" type="radio"/> Change Manager	

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About this Page

- Click on the *Start* button

ORACLE PRISM TRKS Supervisor

Diagnostics Home Logout Preferences Help

Information

Please enter an Effective Date on or after 01-Jan-2009.

Change Manager: Effective Date Options Back Continue

Effective Date 27-Oct-2009

Employee Name Supervisor A Student20 Employee Number 125482
Organization Email Address npatuc@bc.pitt.edu Department PRISM TRKS
Manager Supervisor D Student20 Job Staff.Administrator.III

Enter the date on which the changes should take effect, and press the Continue button.

Changes should take effect on the effective date as entered below.
Effective Date 27-Oct-2009 example: 27-Oct-2009

Changes should take effect as soon as final approval is made.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

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- Verify effective date is correct
- Click on *Continue* button

Lab 1 Solutions: Change an Employee's Supervisor

Change Manager

[Cancel](#) [Back](#) [Next](#)

Effective Date 27-Oct-2009

Employee Name Supervisor A Student20
Organization Email Address npatuc@bc.pitt.edu
Manager Supervisor D Student20

Employee Number 125482
Department PRISM TRKS
Job Staff.Administrator.III

Reassign Direct Reports to a New Manager

You can assign all direct reports to the same new manager or make individual manager assignments below.

* Transfer Date 27-Oct-2009
(example: 27-Oct-2009)

New Manager Student20, Supervisor E

[Assign to All](#)

[New Manager](#)

Effective Transfer Date	Direct Report's Manager	Direct Report	Job
27-Oct-2009	Student20, Supervisor A	Student20, Employee C	Staff.Administrator.III
27-Oct-2009	Student20, Supervisor A	Student20, Employee P	Staff.Administrative Support.I

Assign New Direct Reports

You can assign new direct reports to the selected person in the New Direct Report fields.

Effective Transfer Date	New Direct Report	Job	Remove
27-Oct-2009			Remove

[Add Another Row](#)

[Cancel](#) [Back](#) [Next](#)

- Type all or part of Supervisor E's name and tab, or use the *Flashlight Find* icon
- Click *Assign to All* button

Change Manager

[Cancel](#) [Back](#) [Next](#)

Effective Date 27-Oct-2009

Employee Name Supervisor A Student20
Organization Email Address npatuc@bc.pitt.edu
Manager Supervisor D Student20

Employee Number 125482
Department PRISM TRKS
Job Staff.Administrator.III

Reassign Direct Reports to a New Manager

You can assign all direct reports to the same new manager or make individual manager assignments below.

* Transfer Date 27-Oct-2009
(example: 27-Oct-2009)

New Manager Student20, Supervisor E

[Assign to All](#)

Effective Transfer Date	Direct Report's Manager	Direct Report	Job
27-Oct-2009	Student20, Supervisor E	Student20, Employee C	Staff.Administrator.III
27-Oct-2009	Student20, Supervisor E	Student20, Employee P	Staff.Administrative Support.I

Assign New Direct Reports

You can assign new direct reports to the selected person in the New Direct Report fields.

Effective Transfer Date	New Direct Report	Job	Remove
27-Oct-2009			Remove

[Add Another Row](#)

[Cancel](#) [Back](#) [Next](#)

- Review Effective Date and *Direct Report's Manager* fields are accurate
- Click the *Next* button in the top right corner

Lab 1 Solutions: Change an Employee's Supervisor

ORACLE PRISM TRKS Supervisor [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

Change Manager: Review [Cancel](#) [Printable Page](#) [Back](#) [Submit](#)

Effective Date 27-Oct-2009

Employee Name	Supervisor A Student20	Employee Number	125482
Organization Email Address	npatauc@bc.pitt.edu	Department	PRISM TRKS
Manager	Supervisor D Student20	Job	Staff.Administrator.III

Review your changes and, if needed, attach supporting documents.
● Indicates Changed Items.

Reassigned Direct Reports

Worker Name	Job	Current Manager Name	Proposed Manager Name	Effective Transfer Date
Student20, Employee C	Staff.Administrator.III	Student20, Supervisor A	Student20, Supervisor E ●	27-Oct-2009
Student20, Employee P	Staff.Administrative Support.I	Student20, Supervisor A	Student20, Supervisor E ●	27-Oct-2009

Additional Information

Attachments
To help approvers understand the request, you can attach supporting documents, images, or links to this action.
None [Add](#)

Approvers

Details	Line No	Approver	Approver Type	Order No	Category	Status	Delete
Show	1	Student20, Supervisor D	HR People	1	Approver	Approved	

[Add Adhoc Approver](#)

Comments to Approver

[Cancel](#) [Printable Page](#) [Back](#) [Submit](#)

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- Supervisor E's name should appear in the *Proposed manager* column beside Employee C & Employee D's names
- Click the *Submit* button to process the changes

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Confirmation

Your changes have been submitted for manager approval. [Home](#)

[Diagnostics](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

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- A *Confirmation* page should appear confirming that the changes have been submitted to Supervisor D's supervisor for approval.
- Click on *Home* button to return to the *PRISM Homepage*