March UL Meeting

March 17, 2015
Agenda

• HCM Upgrade 9.2 – Matt Rose
• Use of Supervisor ID and Updating Delegate Groups for Approvals – Jim Mettlach
• DEMO: Supervisor ID Reports – Jamie Croy
<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
<th>Time</th>
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<tbody>
<tr>
<td>Last day for new queries and system</td>
<td>Friday, May 29</td>
<td>5 p.m.</td>
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<td>enhancements</td>
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<td>Dress rehearsal</td>
<td>Friday, June 12 to Sunday, June 14</td>
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<tr>
<td>System outage begins</td>
<td>Thursday, June 25</td>
<td>5 p.m.</td>
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<tr>
<td>Upgraded system available</td>
<td>Monday, June 29</td>
<td>7 a.m.</td>
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HCM Upgrade 9.2 - Communications

• HRMS Update newsletter to all staff with HRMS system roles to announce upgrade scheduled for March
• Upgrade Central Website updates ongoing [http://www.mais.umich.edu/hrms/upgrade/](http://www.mais.umich.edu/hrms/upgrade/)
HCM Upgrade 9.2 - Look & Feel
HCM Time & Labor 9.2 Approval Process

• Supervisor ID on Job will be the Primary Time Approver
  • Each Primary Approver can have up to 5 delegates to approve their employee’s time
  • Only supervisors and their delegates can approve the employee’s time
  • Timekeepers will no longer be able to approve time unless they are a delegate or a supervisor
Time Approval Delegate Groups

Delegate Group Owner - the Supervisor ID on an employee’s Job record (Primary Time Approver)

Delegate Group - the Supervisor’s backup approvers

Delegate - can only approve time for the delegate group owner’s employees
DELEGATE SEARCH PAGE

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

Find an Existing Value

Search Criteria

Search by: Delegate Owner begins with

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

Search Advanced Search
WHO CAN UPDATE Delegate Groups

• Before the Upgrade
  • Users with the following roles can update ANY delegate group:
    • TL TIME ENTRY USERS
    • TL TIME ENTRY APPROVER
    • TL DELEGATE GROUP UPDATER - New role requested in OARS

• After the Upgrade
  • Delegate Group Owners (Supervisor ID) will ONLY be able to update THEIR OWN Delegate group
  • Users with the TL DELEGATE GROUP UPDATER role will be able to update ANY delegate group
Supervisor ID Action Item for ULs

• Take a look at how Supervisor ID is currently used in your unit and how it will be used after the upgrade
  – Update if needed
  – Populate if Blank

• Update Delegate Groups prior to June 25, 2015
  – Add or Remove Employees in a Time Approval Delegate Group - Step-by-Step Procedure
  – Can request assistance from the University Payroll Office

• Request access to the TL DELEGATE GROUP UPDATER role for appropriate individuals for future
DEMO: Tools to View Supervisor ID
Supervisor ID Action Item for ULs

Reports

● Supervisor ID data selection and upload (HR PAR Updater or HR Appt Viewer)
  ○ Uploading Employee Supervisor Information - Reference Document

● Supervisor ID Reports (HR PAR Updater or HR Appt Viewer)
  ○ Run Supervisor ID Reports - Step-by-Step Procedure
Questions?