Employee Supervisor Management System

Human Resources

613-562-5832 | infohr@uOttawa.ca



Disclaimer notice

This document is provided strictly for information purposes, and its content may change without notice. It does not replace the provisions of collective agreements, the University's policies and practices or its official interpretations of these documents, which prevail at all times. If this information does not fully meet your accessibility needs, please contact Human Resources.

For more information

Human Resources 550 Cumberland St. Room 019 K1N 6N5 Tel.: 613-562-5832 Fax.: 613-562-5206 infohr@uOttawa.ca

[©] Human Resources, University of Ottawa

Version: 1.0.3624

Table of Contents

Basics
Employee Supervisor Management System5 Accessing the ESMS5
Logging into the ESMS
Requesting access to the ESMS7
Understanding user roles
What to know before assigning organizational codes. 8
User Administration
AssigCertain HR users are responsible for assigning Level 1 user roles.ning Level 1 user roles13
Assigning Level 2 user roles
Dashboard
Browsing the list of employees with no supervisor
Assigning a supervisor to many employees
Browsing the list of orphan organizational codes
Employee Search
BrowsinThe system can display information about an employee and their
supervisorg employee information
Changing an employee's supervisor through the View Employee Details screen
Assigning employees to a supervisor through the View Employee Details screen
Assigning a Level 2 supervisor through the View Employee Details screen

Basics

Employee Supervisor Management System

The ESMS has been designed to allow users in the faculties and services to check their organizational hierarchies and assign a supervisor to each employee in their unit. A Web application, available from Virtuo, updates the information.

Users can view reports to check and research information on supervisors.

Access to the data is based on Timesheet Org of each employee

The employee data in the Employee Supervisor Management System is drawn from Banner.

It is possible to assign a supervisor to each job held by an employee. For example, an employee who is employed in two part-time positions may have one supervisor for each position.

Data on employee supervisors is downloaded into Banner and posted in the Current Job Records report of the FAST portal's FastHR app.

Accessing the ESMS

You can access the ESMS in one of three ways:

- 1. Enter the following address <u>https://erp-forms.uottawa.ca/ecis/</u>¹ in the address bar of your navigator
- 2. Go to<u>Management</u>². Click Compensation.<u>Gestion</u>³. From the Start an Application section, click Employee Supervisor Management System (ESMS).

^{1.} https://erp-forms.uottawa.ca/ecis/

^{2.} http://www.uottawa.ca/human-resources/management

^{3.} http://www.uottawa.ca/ressources-humaines/gestion

3. Log into VirtuO, click the Applications tab, and select Employee Supervisor Management System (ESMS). You can access VirtuO through University's <u>Employees</u>⁴ website

i uOttawa	a Virt uO	
Home Te	eaching and research	Human reso
Applications	Employee giving pro	gram
Applications		

Logging into the ESMS

- 1. Enter your Outlook user name (without the @uottawa.ca).
- 2. Enter your Outlook password.

^{4.} http://www.uottawa.ca/en/employees

3. Click on *Log In*.

vord.		_	
User Name:	lbouchar		
Password:	*******		

Requesting access to the ESMS

Here are the steps to request access to the ESMS, depending on the user role Steps for Human Resources (HR) and Level 1 users

- 1. Users fill out a form to request access to the Employee Corporate Information System (ECIS) and send it by email to <u>CCSAM@uOttawa.ca</u>.
- 2. CCSAM adds the user to the AD group to give that person access to the ESMS.
- 3. CCSAM sends an email to HR to notify them that the user has been added to the ECIS_AD group.
- 4. HR assigns a role and a list of organizational codes to the Level 1 user.
- 5. HR send an email to the Level 1 user to notify the person that they now have access to the ESMS and that they can now assign roles and organizational codes to Level 2 users in their faculty or service.

Steps for Level 2 users

- 1. Users fill out a form to request access to the Employee Corporate Information System (ECIS) and send it by email to <u>CCSAM@uOttawa.ca</u>.
- 2. CCSAM adds the user to the AD group to give that person access to the ESMS.

- 3. CCSAM sends an email to the Level 2 user to notify them that they have been added to the EMSM_AD group.
- 4. The Level 2 user then forwards the CCSAM email to the administrative director of the faculty or service so that the director can assign a list of organizational codes and a Level 2 role to the Level 2 user.

Understanding user roles

The ESMS allows users in faculties and services to find, see and update information about the supervisor of each employee.

Users must first be added to the ECIS_USERS security group so that they can be assigned a user role within the ESMS.

Please refer to the section in this guide entitled Requesting access to the ESMS to learn how to request access to the system.

Different user roles determine access to different parts of the ESMS.

The following table gives a brief description of each user's role and responsibilities.

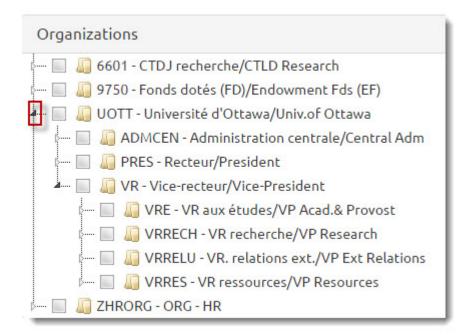
Role	Responsibilities
HR Administrator	The HR Administrator of the ESMS is responsible for assigning HR roles to users working in HR.
HR User	HR Users are responsible for assigning Level 1 roles. They are also responsible for assigning organizational codes to users. HR users must change or remove Level 1 roles when a user changes positions or leaves the University.
Level 1 User1	Level 1 users are responsible for assigning Level 2 roles and the corresponding organizational codes to users in their faculty or service.
Level 2 User	Level 2 users are responsible for updating information on supervisors in their faculty or service.

What to know before assigning organizational codes

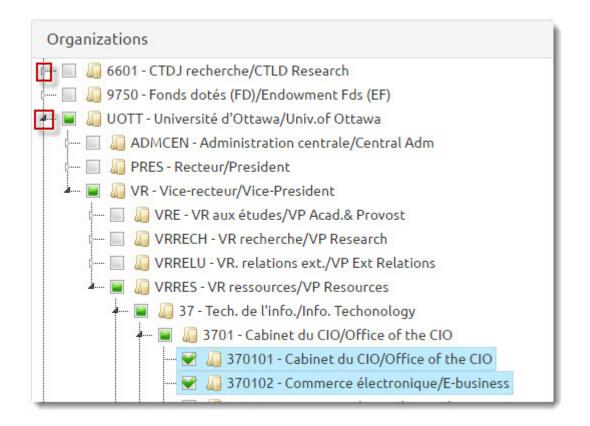
A user's access to information on employees and their supervisor is based on the role the user has been assigned, as well as the list of organizations to which the employees and their supervisor belong. To access the lowest hierarchies of an organization, click the left-hand arrows as illustrated below

Organizations	
🔚 🔲 🕼 6601 - CTDJ recherche/CTLD Research	
🖙 🔲 🔎 9750 - Fonds dotés (FD)/Endowment Fds (EF)	
🖙 🔲 🌆 UOTT - Université d'Ottawa/Univ.of Ottawa	
🔚 🔲 ZHRORG - ORG - HR	

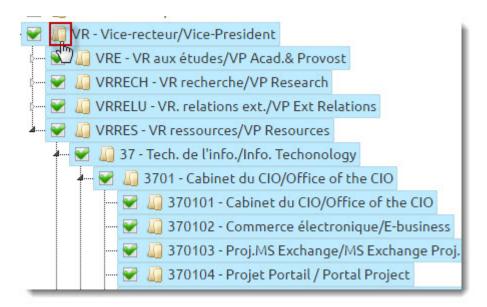
Click the arrow in line with UOTT to display lower levels (President and vice-presidents).



Next, continue to click the arrows (in the red boxes) to display ever lower levels in the hierarchy of organizational codes.

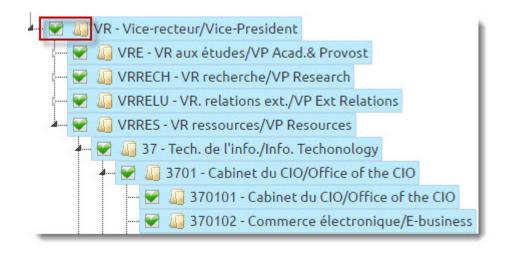


The system allows users to select a group of organizations. To do so, click the yellow file icon, as seen below.



The system highlights the selected organizational codes in blue.

To deselect a code, click the corresponding box with the green checkmark or click the yellow file icon.



User Administration

AssigCertain HR users are responsible for assigning Level 1 user roles.ning Level 1 user roles

Certains utilisateurs des RH ont la responsabilité d'assigner les rôles d'utilisteur de Niveau 1.

1. Click User Admin.



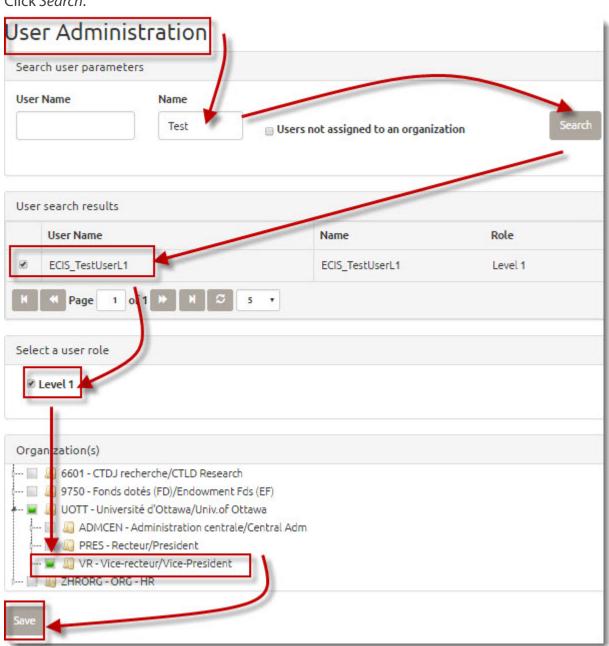
 Note: ESMS users must have access to the ECIS_AD group to be listed as users of this system. If a user does not appear, the user must fill out the <u>Request for</u> <u>access to HR/Pay Systems</u>⁵ and check the option labelled Système de gestion des superviseurs des employés / Employee Supervisor Management System (ECIS_AD).

To find an employee, enter at least one search parameter.

- Enter the Outlook user name (without the @uottawa.ca)
- Enter the full or partial name of the employee
- Numéro d'employé (les neufs chiffres du numéro d'employé)
- Users not assigned to an organization.

^{5.} http://www.uottawa.ca/ressources-humaines/sites/www.uottawa.ca.ressources-humaines/files/ access_form_hr_decentralized_users-octobre_2016.pdf

3. Click Search.



- 4. Select the *level*.
- 5. Select the organizational codes to which the user must have access.
- 6. Click Save.

The system saves the information and displays the list of users and their role.

Assigning Level 2 user roles

Level 1 users are responsible for assigning user roles to Level 2 users within their service or faculty.

1. Click User Admin.



 Note: ESMS users must have access to the ECIS_AD group to be listed as users of this system. If a user does not appear, the user must fill out the <u>Request for</u> access to <u>HR/Pay Systems</u>⁶ and check the option labelled Système de gestion des superviseurs des employés / Employee Supervisor Management System (ECIS_AD).

To find an employee, enter at least one search parameter.

- Enter the Outlook user name (without the @uottawa.ca)
- Enter the full or partial name of the employee
- Numéro d'employé (les neufs chiffres du numéro d'employé)
- Users not assigned to an organization.

3. Click Search.

lew System Users Paramete	rs			
	me ecilia	Employee #	Users with no or	rgs assigned Search
lew System Users				
User Name	Full Name	Emplo	yee Num	Role
cgeldrez	Cecilia Geldrez			
K « Page 1 of 1 »	N 3 10 T			Displaying re
elect a user role from the lis	ρ.,			
Organizations				
 I201 Faculté des arts ; I202 English I202 English I202 English I202 English I202 English I202 English 	e			l≱

- 4. Select the level.
- 5. Select the organizational codes to which the user must have .
- 6. Click Save.

The system saves the information and displays the list of users and the role.

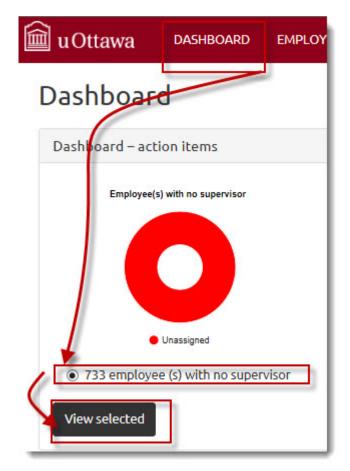
Ne	w System Users			
	User Name	Full Name	Employee Num	Role
	ECIS_TestUserL1	ECIS_TestUserL1		Level1
	atomita	Alex Tomita		Level1

Dashboard

Browsing the list of employees with no supervisor

The system allows you to see the list of employees to whom no supervisor has yet been assigned.

1.



Click Dashboard.

2. **(For Note:** The system displays the number of employees to whom no supervisor has yet been assigned.

Click the button next to the number of *employee(s)* with no supervisor.

3. Click View Selected.

4. Enter one or more parameters in the following fields to filter the employee list (optional).

If no parameter is selected, the system displays the complete list of employees that match the organizational codes to which the user has access

- Employee Number
- Last Name(complete or partial)
- First Name (complete or partial)
- Org Code
- E-Class

Assign emp	loyees t	o a super	visor		
Employee search p	arameters				
Employee Number	Last Name	First Name	Org Code	E-Class	
	mao			1j	Searc

- 5. Click Search.
- 6. Select the employee.

er	Position #	Job suffix	Job title
8942 Yang Mao	NP0002	00	Non-Paid Clinicians
		8942 Yang Mao NP0002	8942 Yang Mao NP0002 00

7. Click Next.

- 8. The top of the screen displays the search fields for the supervisor. The selected employees are displayed at the bottom of the screen. Enter at least one supervisor search parameter.
 - Employee Number
 - *Last Name* (partial or complete)
 - *First Name* (partial or complete)
 - Org Code
 - E-Class

Supervisor search p	arameters				
Employee Number	Last Name	First Name	Org Code	E-Class	
	oza				Search

9. Click Search.

10. Select a supervisor from among the supervisor search results to assign.

Employee number	Full name	Position #	Job suffix	Job title
1	Walter Kozar	N	00	Non-Paid Clinician
1	Jean-Francois Kozak	N	00	Non-Paid Clinicians
K K Pag	ge 1 of 1 ≫ N S ployee(s)	50 🗸		
7		50 V Position #	Job suffix	Job title

11. Click Confirm.

The system confirms that information has been saved and returns to the dashboard to display an updated number of employees with no supervisor.

Assigning a supervisor to many employees

Il est possible d'assigner plusieurs employés à un superviseur .

1. Click Dashboard.

2. **Note:**

Le système affiche le nombre d'employés qui n'ont aucun superviseur qui leur est assigné.

🛍 uOttawa	DASHBOARD
Dashboar	d.
Dashboard - Act	ion Items
73. Assing	Missing Supervisor

Click View Selected.

3. (Optionnel) Entrer un paramètre dans les champs suivants pour filtrer la liste d'employés affichée.

Assign employees to a supervisor

Employee search p	arameters				
Employee Number	Last Name	First Name	Org Code	E-Class	
	za			1 j	Search

- Employee Number
- Last Name (complete or partial)
- *First Name* (complete or partial)
- Org Code
- E-Class

Le système affiche la liste complète des employés faisant partie de votre faculté ou service si vous n'ajoutez pas de paramètres à cette étape.

	Employee number	Full name	Position #	Job suffix	Job title
	100	Yannick Duguay	-	00	Non-Paid Clinicians
	100	Yang Mao	-	00	Non-Paid Clinicians
•	100	Surriya Tahirkheli	10710103	00	Non-Paid Clinicians
	100	Gyaandeo Maharajh	interest	00	Non-Paid Clinicians
	100	Amiya Commons	amona-	00	Non-Paid Clinicians

4. Sélectionner les employés.

5. Click Next.

Le système affiche la liste des employés sélectionnés dans la section du bas et vous permet de trouver un superviseur dans la portion du haut afin de lui assigner la liste d'employés affichée.

6. Entrer au moins un paramètre de recherche pour trouver le superviseur.

Employee Number	Last Name	First Name	Org Code	E-Class	
		walter		1j	Searc

- Employee Number
- Last Name (complete or partial)

.

- First Name (complete or partial)
- Org Code

. .

- E-Class
- 7. Click Search.

8. Sélectionner le superviseur affiché dans la section *Résultat de la recherche du superviseur*.

Employe number	e Full name	Position #	Job suffix	Job title
100	Walter Kozar	-among	00	Non-Paid Clinician
K K Pa	age 1 of 1 🕨 X	S 50 ¥		
Selected en	nployee(s)			
-				
	Full name	Position #	Job suffix	Job title
number	Full name Yannick Duguay	Position #	Job suffix	
Employee number 100		Position #		Job title Non-Paid Clinicians Non-Paid Clinicians

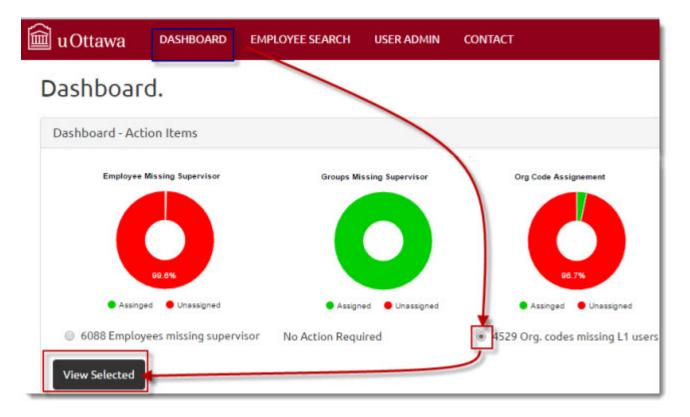
9. Click Confirm.

Le système confirme que l'information a été sauvegardée et retourne au tableau de bord et affiche un nouveau nombre d'employé(s) sans superviseur.

Browsing the list of orphan organizational codes

Access to ESMS data is based on the University's hierarchy of organizational codes (org codes). Consequently, each organizational code must be assigned to a Level 1 user so that this person can see the employees that belong to the various organizational codes.

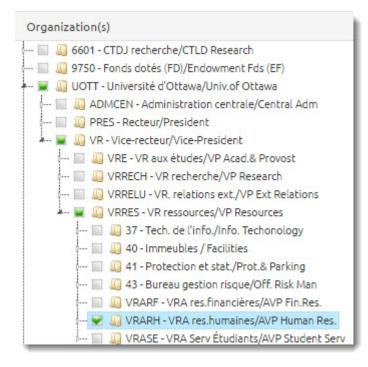
1. Click Dashboard.



- 2. Click the button next to Codes missing L1 users
- 3. Click View Selected.

The system displays the list of organizations to which no Level 1 user has been assigned, as well as the list of Level 1 users. Select one or more organizational codes.

4. Select the *Organization(s)*.



- 5. Enter a search parameter to find a Level 1 user (optional).
 - User Name
 - Name

anthier
Name
André Lanthier
50 *

- 6. Click Search.
- 7. Select the user from the list displayed.
- 8. Click Save.

The system saves the information and displays the dashboard.

Employee Search

BrowsinThe system can display information about an employee and their supervisorg employee information

Le système permet d'afficher les informations sur l'employé et son superviseur.

1. Click Employee Search.

🗰 uOttawa	DASHBOARD	EMPLOYEE SEARCH	USER ADMIN	CONTACT	FRANÇAIS	

2. The system displays the list of employees to which the user has access. Enter a search parameter in one of the following fields to apply a filter to the list of employees displayed (optional).

Employee Search Para	ameters				-
Employee Number	Last Name	First Name	Org Code	E-Class	
	Go	Pokemon			Search

- Employee Number
- Last Name (full or partial)
- First Name (full or partial)
- Org Code
- E-Class

NOTE: The system displays the number of employees to whom no supervisor has been assigned. To sort the data by field, click on the corresponding field: Employee Number, Name and First name, position title, Employee organizational code. Click on the arrows at the bottom of the page to scroll to the following pages. To change the number of rows that are displayed on screen, click on the rolling list next to the navigation arrows.

Employee number J²	Full name	Position #	Job suffix	Job title
100000024	Kwan-Leung Chan	NP0002	00	Non-Paid Clinicians
100000210	Sylvie Émond	100157	00	Lab. Animal Research Techn.
100000276	Denis Faubert	100861	00	Team Coord., Security Division
100000310	Nicole Marinier	100297	00	Receiving Clerk

- 3. Click Search.
- 4. Click on the eye icon to display information about the employee.

Employee number J ²	Full name	Position #	Job suffix	Job title	Org. Code	E-Class
100257028	Pokemon Go 3	201180	00	Vice-Dean Acad./Secretary	190101	1A-Regular Academic - O APUO

The system displays information on the employee, their supervisor (if assigned) and the list of employees that report to the employee (if they have been assigned).

Employee Details			
Employee Number	100257028	Position Number	
Job Status	A	Job suffix	00
First Name	Pokemon	Employee Org Code	190101
Last Name	Go 3	Organization Name	Social ScAdm.
Job title	Vice-Dean Acad./Secretary	Supervisor	Marcel Merette (Change supe
E-Class Code	1A	Employee Staff Count	Assign Employees
	o not post the job details on th s for Pokemon Go 3	e university public web site	2
	1001	Position Number	200202
Employee Number			00
Employee Number Job Status		Job suffix	00
	A	Job suffix Employee Org Code	
	A Marcel		190201
Job Status First Name	A Marcel Merette	Employee Org Code Organization Name	190201

5. Click on *Do not post job details on the university public website* if you do not want this information to be publicly available on the employee directory.

Changing an employee's supervisor through the View Employee Details screen

You can change the employee's supervisor from the View Employee Details screen.

1. Click Change supervisor.

/iew employee	e details		
Employee Details			
Employee Number	100257028	Position Number	201180
Job Status	A	Job suffix	00
First Name	Pokemon	Employee Org Code	190101
Last Name	Go 3	Organization Name	Social ScAdm.
Job title	Vice-Dean Acad./Secretary	Supervisor	Marcel Merette (Change superviso
E-Class Code	1A	Employee Staff Count	Assign Employees

- 2. Enter at least one search parameter to find the supervisor
 - Employee Number
 - Last Name (full or partial)
 - *First Name* (full or partial)
 - Org Code
 - E-Class

Employee Number	Last Name	First Name	Org Code	E-Class	
	iobs	steve			Searc

3. Click Search.

4. Select the supervisor.

number	Full name	Position #	Job suffix	Job title
100257018	Steve iPhone Jobs	100002	00	Acad. Dev. & Stud.Retent.Spec
K 📢 Page	1 of 1 🕨 N 🖸	50 •		
Page		30 4		

5. Click Assign a Supervisor.

The system confirms that the supervisor has been assigned and displays the information.

Assigning employees to a supervisor through the View Employee Details screen

You can assign employees to a supervisor from the View Details Information screen.

1. Click Assign Employees.

View employee details

Employee Number	1002	Position Number	
Job Status	A	Job suffix	00
First Name	Kimberly A.	Employee Org Code	152401
Last Name	Bertens	Organization Name	Surgery-Adm.
Job title	Non-Paid Clinicians	Supervisor	Assign a superviso
E-Class Code	1J	Employee Staff Count	Assign Employees

I

- 2. Enter at least one search parameter to find the employee
 - Employee Number
 - Last Name
 - First Name
 - Org Code
 - E-Class

Employee search para	ameters				_
Employee Number	Last Name	First Name	Org Code	E-Class	1
	re	marc		1j	Search

- 3. Click Search.
- 4. Select the employee(s) you wish to assign to this supervisor (you can assign more than one at a time)
- 5. Click Assign Employees.

	Employee number	Full name	Position #	Job suffix	Job title
0	10	Marc Doré		00	Clinicians Unpaid
	10	Jean-Marc Renaud		00	Non-Paid Clinicians

The system saves the information and the employees' names appear under the supervisor's Staff section.

Assigning a Level 2 supervisor through the View Employee Details screen

The name of a Level 2 supervisor can be added to the section containing the information on the employee's supervisor from the View Employee Details screen.

1. Click Assign a supervisor.

/iew employee	e details		
Employee Details	1		
Employee Number	10(Position Number	
Job Status	A	Job suffix	00
First Name	Shu-Tim	Employee Org Code	320198
Last Name	Cheung	Organization Name	Conversion
Job title	Non-Paid Clinicians	Supervisor	Yeyao (Joe) Yu (Chang
E-Class Code	1J	Employee Staff Count	Assign Employees
Do not post the job details	on the university public web	site	
Supervisor Details for Shu	u-Tim Cheung		
Employee Number	MARCH 716.	Position Number	[
Job Status	A	Job suffix	00
First Name	Yeyao (Joe)	Employee Org Code	152301
Last Name	Yu	Organization Name	Medicine-Adm.
Job title	Non-Paid Clinicians	Supervisor	Assign a supervisor
E-Class Code	1J	Employee Staff Count	1 assigned employees

- 2. Enter at least one search parameter to find the Level 2 supervisor.
 - Employee Number
 - Last Name (full or partial)
 - *First Name* (full or partial)
 - Org Code
 - E-Class

Employee Number	Last Name	First Name	Org Code	E-Class	
	jobs	steve			Searc

- 3. Click Search.
- 4. Select the Level 2 supervisor.

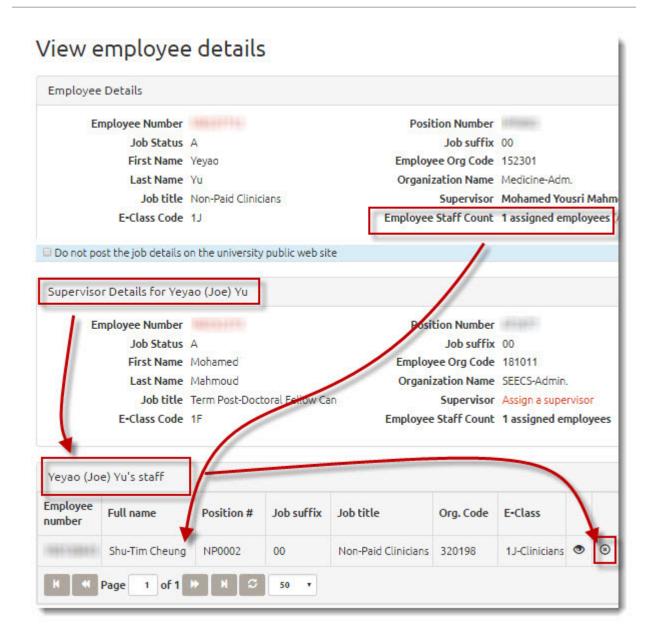
Supervisor s	earch results			
Employee number	e Full name	Position #	Job suffix	Job title
☑ 10025701	18 Steve iPhone Jobs	100002	00	Acad. Dev. & Stud.Retent.Spec.
K K Pa	ige 1 of 1 🕨 H 🖸	50 •		
	rvisor			

5. Click Assign a supervisor.

The system saves the information. The name of the Level 2 supervisor will now appear when employee information is displayed.

Removing an employee from a supervisor's list of staff

You can remove an employee from a supervisor's list of staff.



1. In the [Supervisor's name]'s staff section, click the X-icon next to the employee who is no longer assigned to this supervisor.

The system removes the employee's name from the list of [Supervisor's name]'s staff. If this is the only employee to report to this supervisor, the section will disappear completely.

View employee details

Employee Details			
Employee Number	STREET TO.	Position Number	
Job Status	A	Job suffix	00
First Name	Yeyao	Employee Org Code	152301
Last Name	Yu	Organization Name	Medicine-Adm.
Job title	Non-Paid Clinicians	Supervisor	Mohamed Yousri
E-Class Code	1J	Employee Staff Count	Assign Employees
🗏 Do not post	the job details on the university public web	osite	
Supervisor Details for Yey	vao (Joe) Yu		
		Position Number	
Employee Number		Posicion Number	
Employee Number Job Status	A	Job suffix	
			00
Job Status	Mohamed	Job suffix	00 181011
Job Status First Name Last Name	Mohamed	Job suffix Employee Org Code Organization Name	00 181011