

Human Resource Services has developed a short term solution to make it easier to request changes to reporting relationships.

The latest version of the Reports To app includes several important updates:

- All active staff are now included (both Academic and Support)
- **The Reports To app will be refreshed from PeopleSoft daily (overnight)**
- **Uploads from the Reports To app back to PeopleSoft will occur weekly (refer to the upload schedule)**
- Additional Employee and Reports To information has been made available. You can view this information by clicking the Details button in the last column on the right.
- A "Reports to Name" must be selected from the list. You can narrow the list shown by typing the first few characters of their last name.
- If you have chosen to update the Reports To information, you cannot leave the Reports To Name field blank. If you change your mind and do not want to make a change, you must cancel the request using the Cancel button, just below the Update button.
- Some column titles and data have changed to reflect the new HR Taxonomy.

How to access the app

1. Use this link <https://apps.hrs.ualberta.ca/ReportsToApp>
2. Log in with your CCID
3. You must be a PeopleSoft user
4. You must have General Inquiry access in PeopleSoft
5. You will only be able to see those people you see now within PeopleSoft

How to find an employee

1. You can apply filters to one or more columns to find an employee. Key columns you may want to use are:
 - a. **Employee** - ID, Name, Title
 - b. **Department** - ID
 - c. **Employee / Class** – (Academic, Grad Student, Support, etc.)
 - d. **Bargaining Unit** – (GSA, Faculty, APO, Support – Operating, etc.)
 - e. **Reports to** – Name, Title

Note: only Active employees will show up on the list of employees [vacant positions will not be shown]

How to validate / update information

1. To update the information shown, click the **Edit** button on the second last column to the right.
2. In the **Reports To Name** field, type the first few letters of the person's **last name** and it will narrow down the list for you.

Note: The name format is **LastName,FirstName**

3. Choose the correct name from the Reports To Name list.

Pick carefully since a person may have more than one job [e.g. Terry Harris, Assistant Dean or Terry Harris, Professor]. Choose the job that is appropriate for the reporting relationship [e.g. for employee Irene Lumsdon, HR Administrator, you would choose Terry Harris, Assistant Dean].

4. When you are satisfied that the information is correct, click the **Update** button to accept the change (or click **Cancel** to cancel your change). The Status will be changed to "Pending." When the upload to PeopleSoft has occurred, the status will be changed to "PeopleSoft."
5. You can go on to the next employee

IMPORTANT NOTE: If you have updated the Reports To information and a subsequent update has been made to the employee's Job record in PeopleSoft (e.g., through a Pay Action Form) **before** the Reports To upload to PeopleSoft has occurred, any changes you made in the Reports To app for that employee will be lost.

To minimize any conflicts in data updates, please ensure you coordinate any Pay Action Forms you have submitted for an employee with the updates to the Reports To app. As noted below (Helpful Hint #2), you may wish to use the Export to Excel function to ensure you have a record of the changes you made.

HELPFUL HINTS

1. We recommend that you prioritize your updates as follows, particularly as you consider your plan for implementing online time entry and approvals:
 - a. Hourly – Support, Academic
 - b. Salaried - Support
 - c. Salaried – Academic [APOs, SOTS & Librarians]
 - d. Salaried – Academic [remaining categories]
2. You can use the **Export to Excel** function at the top of the page export a record of the changes you have requested.
3. You can also use the export function to create a spreadsheet and have someone else in the department help with the validation process. However, it is only the designated PeopleSoft user who will be able to enter / update the information in the application.
4. Click on any Column Heading to sort by that column
5. Use the **Items Per Page function** at the bottom of the page to increase or decrease the number of records you see on one page.
6. You cannot copy and paste the Reports To Name from one row to another. You must select the Reports To Name from the drop down list for each employee individually.



Reports to App v2.0

Questions and Support

If you have any issues with logging in, using the application, or with the information you see, please contact the HR Systems and Reporting unit at HRPSS@ualberta.ca.

Urgent Updates

If an **urgent** change to a reporting relationship is required, please contact Employment Services at employmentservices@ualberta.ca.