

POI Workflow Supervisor Job Aid

This guide has been developed for Local HR Administrators responsible for adding Persons of Interest (POI) Workflow Supervisor in the HRMS. The POI Workflow Supervisor relationship is only to be used for non-ANU supervisors of ANU staff. This will enable these supervisors to approve any workflow transactions such as leave and timesheets.

The POI Workflow Supervisor will require an employment record because the HRMS uses position hierarchy for workflow related to Absence and Timesheet Approval and to determine who workflow is sent to. Every position in the HRMS must have a 'Reports To'.

For a more detailed guide on 'Adding a POI' please refer to the Person of Interest (POI) Quick guide located at <http://hr.anu.edu.au/about-hr/hr-systems/hrms-resources>.

There are three steps involved in setting up a Person of Interest as a Workflow Supervisor:

- a) Updating or creating a position for the Workflow Supervisor.
Before creating a new position please see if an inactive position can be re-used or if an active position can be updated. A new job code has been created specifically for this POI category.
- b) Assigning the Supervisor Delegation to the POI Workflow Supervisor Position; and
- c) Adding the POI Workflow Supervisor.

A. Updating Workflow Supervisor Position Data

1.	Navigate to: Home>Organisational Development>Position Management>Maintain Positions/Budgets>Add/Update Position Info Enter the Position Number and click search
2.	<div style="background-color: #4f81bd; color: white; padding: 2px; display: inline-block;">Description</div> Enter the Effective Date – the date the position is to be updated Status – set to Active if previously inactive Reason – click on magnifying glass and select RPT Change to Reports To Position Status – will automatically default to Approved Business Unit – will automatically default to ANUID Job Code – Click on magnifying glass and select HSUP Supervisor <i>(new job code specifically created for POI Supervisors)</i>



- Reg/Temp** – select Regular from the drop down menu
- Full/Part Time** – select Casual from the drop down menu
- Title** – Type in the title of the POI Supervisor
- Short Title** – Type in the short title of the POI Sup
- Reg Region** – will automatically default to AUS
- Department** – enter the 5 digit Department Code to be used for the POI Supervisor
- Company** – will automatically default to ANU
- Location** – will automatically default from the Department
- Reports To** – enter the position number of the Dean/Director responsible for the College/School/Area
- Dot-Line** – leave blank
- Supervisor Lvl** – leave blank
- Security Clearance** – leave blank
- Salary Admin Plan** – leave blank (if defaulted from a previous row delete)
- Grade** – leave blank (if defaulted from a previous row delete)
- Step** – leave blank
- Standard Hours** – will default to 35.00 and needs to be deleted

Position Information Find | View All | First 1 of 4 | Last

Position Number: 00003220 + -
 Headcount Status: Partially Filled Current Head Count: 4 out of 9999
 *Effective Date: *Status:
 Reason: Change to Reports To Action Date: 29/10/2012
 *Position Status: Status Date: Key Position

Job Information

*Business Unit: Australian National University
 *Job Code: Supervisor
 *Reg/Temp: *Full/Part Time:
 *Title: Short Title: [Detailed Position Description](#)

Work Location

*Reg Region: Australia
 *Department: Medical School Administration Company: ANU Australian National University
 *Location: Peter Baume Building
 Reports To: Dean, Medical School Dot-Line:
 Supervisor Lvl: Security Clearance:

Salary Plan Information

Salary Admin Plan: Grade: Step:
 Standard Hours: Work Period:

3.

Specific Information

Max Head Count – leave as default 1. This position cannot be used for more than one supervisor.

Incumbents – Un-tick Update Incumbents which subsequently un-ticks Include Salary Plan/Grade (maintain POI Supervisors manually on Job Data)

Budgeted Position, Confidential Position, Job Sharing Permitted and Available for Telework are all un-ticked

Mail Drop ID – leave blank

Work Phone – leave blank

Health Certification – leave blank

Signature Authority – leave blank

Position Pool ID – leave blank

Pre-Encumbrance Indicator – will automatically default to Immediate

Calc Group (Flex Service) – leave blank

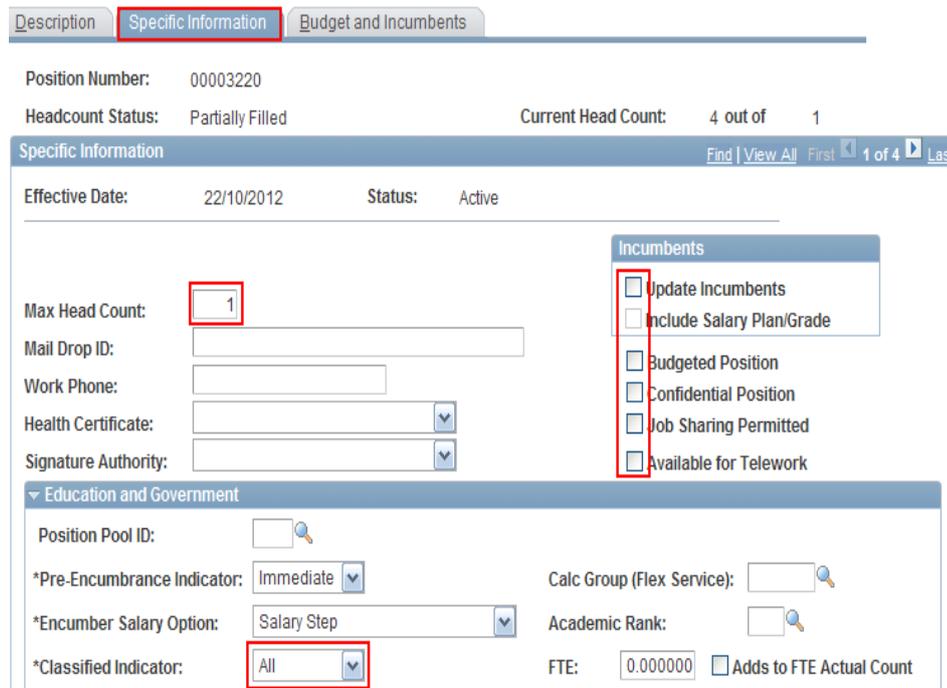
Encumber Salary Option – will automatically default to Salary step

Academic Rank – leave blank

Classified Indicator – select 'All' from drop down menu

FTE – automatically defaults to 0.000000

Adds to FTE Actual Count – leave un-ticked



The screenshot shows a web form with three tabs: Description, Specific Information (highlighted), and Budget and Incumbents. The form displays the following information:

- Position Number: 00003220
- Headcount Status: Partially Filled
- Current Head Count: 4 out of 1
- Effective Date: 22/10/2012
- Status: Active
- Max Head Count: 1 (highlighted with a red box)
- Mail Drop ID: [Blank]
- Work Phone: [Blank]
- Health Certificate: [Dropdown]
- Signature Authority: [Dropdown]
- Incumbents section (checkboxes):
 - Update Incumbents (highlighted with a red box)
 - Include Salary Plan/Grade
 - Budgeted Position
 - Confidential Position
 - Job Sharing Permitted
 - Available for Telework
- Education and Government section:
 - Position Pool ID: [Search]
 - *Pre-Encumbrance Indicator: Immediate
 - *Encumber Salary Option: Salary Step
 - *Classified Indicator: All (highlighted with a red box)
 - Calc Group (Flex Service): [Search]
 - Academic Rank: [Search]
 - FTE: 0.000000
 - Adds to FTE Actual Count:

4. **Budget and Incumbents**

Leave as is

Description | Specific Information | **Budget and Incumbents**

Position Number: 00003220
 Headcount Status: Partially Filled Current Head Count: 1 out of 1

Current Budget

Head Count:	0	Current Budget FTE:	0.00	Amount:	0.000
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Customise | Find | View All | First 1 of 1 Last

*Position Category		
1 Not Applicable		

Current Incumbents

Empl ID	Empl Rcd#	Full/Part	Std Hrs/Wk	Job Data	Name
5267620	0	Casual	0.00	Job Data	Workflow Supervisor

Customise | Find | First 1 of 1 Last

Substantive Incumbents

Empl ID	Empl Rcd Nbr	Full/Part Time	Standard Hours	Name	Job Data
	0		0.00		Job Data

5. Click **Save**

B. Assigning Supervisor Delegation to POI Workflow Supervisor Position

After creating or updating the position for the POI Workflow Supervisor, the 'Supervisor' delegation must be added to the position to enable the POI Workflow Supervisor to approve workflow for timesheets and/or leave.

1. Navigate to: Home>Organisational Development>ANU Position Delegations>Assign Delegations to Position

Enter the **Position Number** and click search
 If the message *'No matching values were found'* appears click on the **Add a New Value Tab** – the Position Number that you searched for will default through – and click on **Add**

Assign Delegations to Position

Find an Existing Value | **Add a New Value**

Position Number: 00003220

Add

2.

Assign Delegations to Position

Enter the **Effective Date** – the date the delegation is to be assigned to the POI Workflow Supervisor

Status – automatically defaults to Active

Delegation From Date – automatically defaults from Effective Date above

Delegation To Date – leave blank

Delegation Status – from drop down menu select LA Submitted

Conditional Approval Status – automatically defaults to Inactive

Tick **Principal Delegate Approved** box

Reason – from drop down menu select New Delegation

Comments – enter reason for assigning delegation to this position (e.g. POI Workflow Supervisor assigned supervisor delegation for approval of timesheets and leave)

Profile Type – click on magnifying glass and select SUPVSR from list

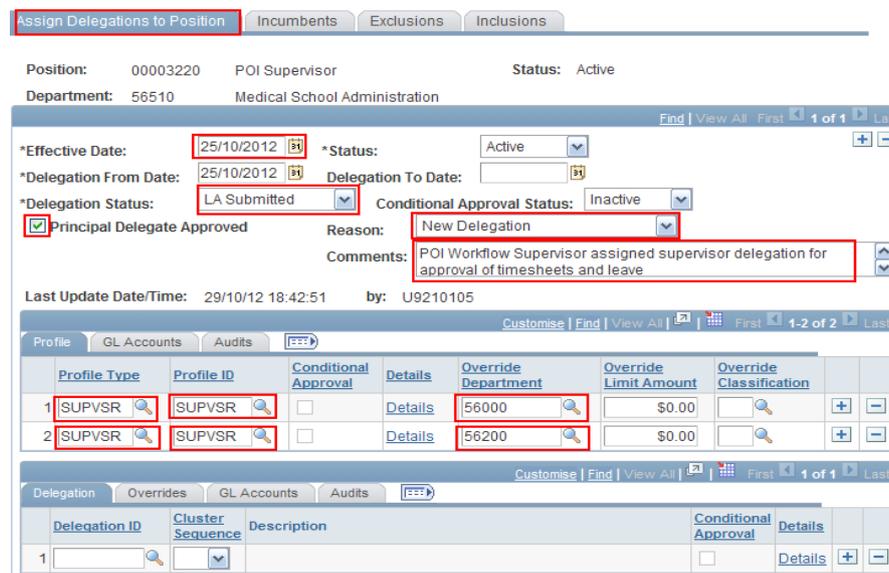
Profile ID – click on magnifying glass and select SUPVSR from list

To see the Delegation ID associated with this delegation click on the **Details** hyperlink

Override Department – leave blank unless the POI Workflow Supervisor is to have the delegation to approve workflow for more departments (e.g. if this field is left blank the POI Workflow Supervisor will only have the delegation to approve for the Department that his position is assigned to in this case 56510. If the POI Workflow Supervisor is to have the delegation to approve for more departments, then another department ID will need to be entered. To approve for more departments add rows using the same profile type and profile id and entering the department id's)

Override Limit Amount – automatically defaults to \$0.00

Override Classification – leave blank



Position: 00003220 POI Supervisor Status: Active
 Department: 56510 Medical School Administration

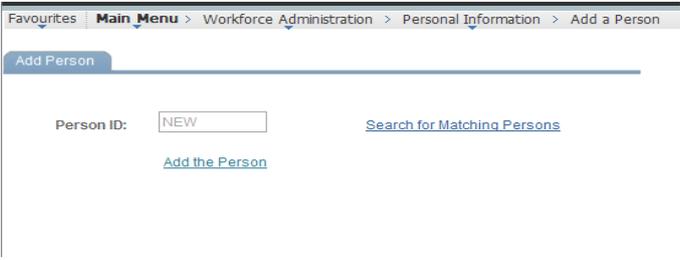
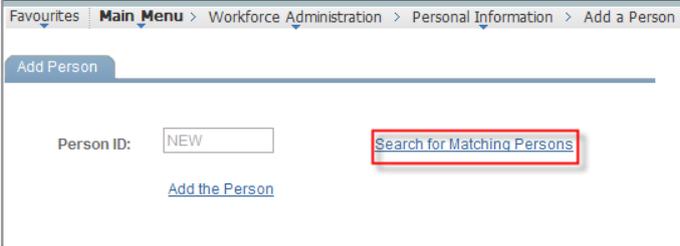
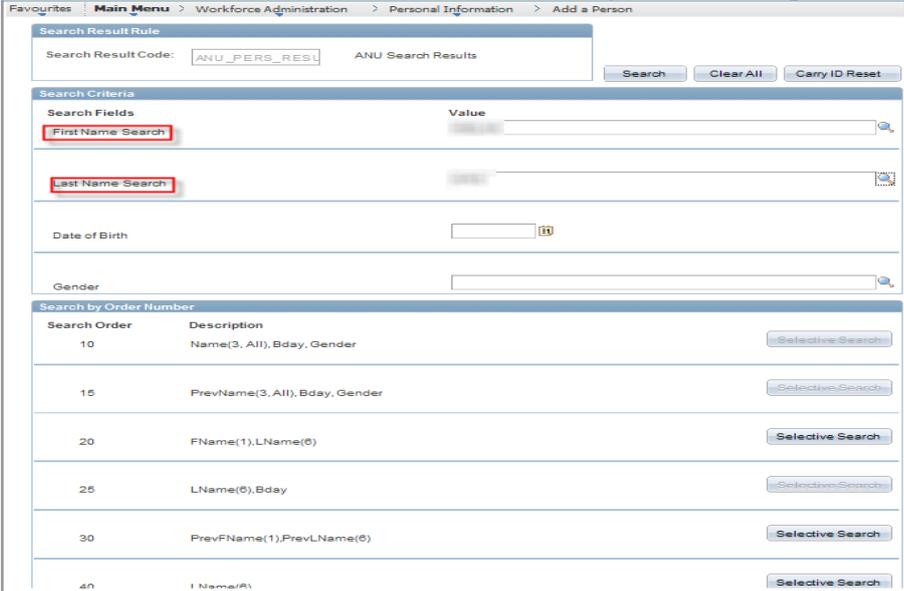
*Effective Date: 25/10/2012 *Status: Active
 *Delegation From Date: 25/10/2012 Delegation To Date:
 *Delegation Status: LA Submitted Conditional Approval Status: Inactive
 Principal Delegate Approved Reason: New Delegation
 Comments: POI Workflow Supervisor assigned supervisor delegation for approval of timesheets and leave
 Last Update Date/Time: 29/10/12 18:42:51 by: U9210105

Profile Type	Profile ID	Conditional Approval	Details	Override Department	Override Limit Amount	Override Classification
1 SUPVSR	SUPVSR	<input type="checkbox"/>	Details	56000	\$0.00	
2 SUPVSR	SUPVSR	<input type="checkbox"/>	Details	56200	\$0.00	

Delegation ID	Cluster Sequence	Description	Conditional Approval	Details
1			<input type="checkbox"/>	Details

3.	Incumbents Leave as is
4.	Exclusions Leave as is
5.	Inclusions Leave as is
6.	Click Save

C. Adding a POI Workflow Supervisor

1.	<p>Navigate to: Home>Workforce Administration>Personal Information>Add a Person</p> 																					
2.	<p>Select 'Search for Matching Persons' link.</p> 																					
3.	<p>Enter the 'First Name' and 'Last Name' of POI you are adding. In example below.</p>  <table border="1"> <thead> <tr> <th>Search Order</th> <th>Description</th> <th>Selective Search</th> </tr> </thead> <tbody> <tr> <td>10</td> <td>Name(3, All), Bday, Gender</td> <td>Selective Search</td> </tr> <tr> <td>15</td> <td>PrevName(3, All), Bday, Gender</td> <td>Selective Search</td> </tr> <tr> <td>20</td> <td>FName(1), LName(6)</td> <td>Selective Search</td> </tr> <tr> <td>25</td> <td>LName(6), Bday</td> <td>Selective Search</td> </tr> <tr> <td>30</td> <td>PrevFName(1), PrevLName(6)</td> <td>Selective Search</td> </tr> <tr> <td>40</td> <td>I Name(A)</td> <td>Selective Search</td> </tr> </tbody> </table>	Search Order	Description	Selective Search	10	Name(3, All), Bday, Gender	Selective Search	15	PrevName(3, All), Bday, Gender	Selective Search	20	FName(1), LName(6)	Selective Search	25	LName(6), Bday	Selective Search	30	PrevFName(1), PrevLName(6)	Selective Search	40	I Name(A)	Selective Search
Search Order	Description	Selective Search																				
10	Name(3, All), Bday, Gender	Selective Search																				
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20	FName(1), LName(6)	Selective Search																				
25	LName(6), Bday	Selective Search																				
30	PrevFName(1), PrevLName(6)	Selective Search																				
40	I Name(A)	Selective Search																				

4. If you use the 'Tab' button the 'Selective Search' button will become available to use.

Search by Order Number	
Search Order	Description
10	Name(3, All), Bday, Gender Selective Search
15	PrevName(3, All), Bday, Gender Selective Search
20	FName(1), LName(6) Selective Search

5. You will then get a list of people who already have a Uni ID with similar name and/or birth date according to your search. It is best not to use Date of Birth as a search mechanism as this will limit results for POI's that have been entered with Birth Date of 1/1/1900.
Please be aware of 'View All' button at top of page to ensure that you aren't missing anyone.

Favourites | Main Menu > Workforce Administration > Personal Information > Add a Person

Search Results

Search Type: Person Ad Hoc Search
 Search Parameter: ANU_PERS_SEARCH Global Search
 Result Code: ANU_PERS_RESULT ANU Search Results

Search Results Summary [Return to Search Criteria](#)

Number of ID's Found: 1
 Search Order Number: 20 FName(1), LName(6)

Search Results Customise | Find | **View All** | First 1 of 1 | Last

Results	Results2	Additional Information	Emp ID	Name Type	Date of Birth	Last Name	First Name	Middle Name
1	Carry ID	Detail		PRI	17/03/1979			

6. If no ID's are returned for the person you are entering, proceed to 'Add a Person'
If a matching person is returned please go to 'Add a POI Instance' using the active Empl ID and Person of Interest Type – Workflow Supervisor. Click on Add the Relationship and proceed to step 14 below.

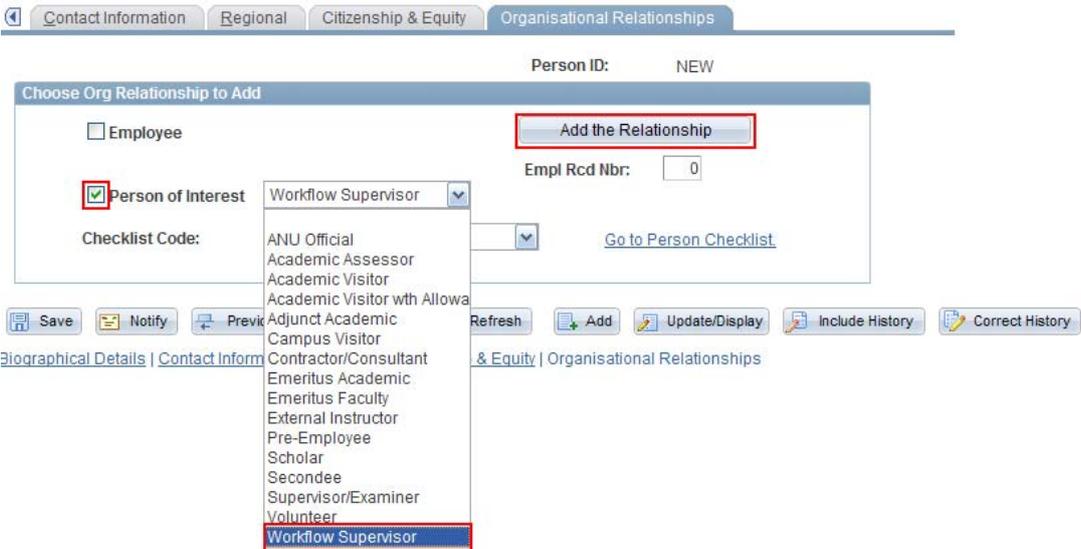
Navigation: Home>Workforce Administration>Personal Information>Add a Person

Favourites | Main Menu > Workforce Administration > Personal Information > Add a Person

Add Person

Person ID: [Search for Matching Persons](#)

Add the Person

7.	<p>Biographical Details</p> <p>Enter the Effective Date – the date this person will exist from in the system. Avoid using a future date as once saved the person will be ‘hidden’ in the system until that date.</p> <p>Enter other details as necessary:</p> <p>Click Add Name to record the persons’ name Enter the Date of Birth (if no Birthdate has been supplied enter 01/01/1900) Enter Gender</p>
8.	<p>Contact Information</p> <p>Click on Add Address Detail link then click on Add Address link and enter address details (work address details will suffice). Enter Phone and email information if available. You will need to tick ‘preferred’ box for the phone and email they prefer to be contacted by. HRMS will automatically generate an email address linked to the Uni ID.</p>
9.	<p>Regional</p> <p>Enter relevant information if you have it.</p>
10.	<p>Citizenship & Equity</p> <p>Enter relevant information if you have it.</p>
11.	<p>Organisational Relationships</p> <p>Select Person of Interest checkbox and select Workflow Supervisor from the drop down menu and Click on the Add the Relationship button</p> 

12. If the screen below appears, just select **Return** Button. This is the system making sure that you have conducted Search/Match.

Favourites | **Main Menu** > Workforce Administration > Personal Information > Add a Person

Search Results

WARNING: Potential duplicates were found - this person may already exist in the database. Refer to the list below for possible matches to the person you are adding. After you click the return button at the bottom of the page, you'll be asked whether you want to continue adding this new person, or cancel this operation.

Match Criteria

Search Results Summary

Search Results

Results	Results2	Additional Information	Empl ID	Name Type	Date of Birth	Last Name	First Name	Middle Name
1	Carry ID	Detail	.....	PRF	01/01/1969	M.....	J.....	M.....
2	Carry ID	Detail	.....	PRI	10/09/1958	M.....	J.....	M.....
3	Carry ID	Detail	.....	PRI	28/09/1992	M.....	J.....	E.....
4	Carry ID	Detail	.....	PRI	14/01/1956	M.....	J.....	M.....
5	Carry ID	Detail	.....	PRI	01/01/1969	M.....	J.....	M.....

Return

13. If this Warning message appears select **OK**

Warning -- Do you want to continue? (1000,1351)

The previous page indicated that the person you are adding may already exist in the system. Do you want to continue adding this person?

Click OK to continue adding this person, or
Click CANCEL to quit without saving this new person.

OK Cancel

14. You will then be taken to the **Work Location** page in **Job Data**

Please note the ID has been generated at this point.

Enter the **Effective Date** – the date this person will exist from in the system.

The **Action** – Add Person of Interest will default

Select the **Reason** – Non Payee from the drop down menu

Enter the **Position Number**

Work Location | Job Information | Payroll | Salary Plan | Compensation

POI Workflow Supervisor: POI Workflow ID: 5267644 Empl Rcd #: 0

Work Location

HR Status: Active Job Status: Active Go To Row: + -

*Effective Date: 25/10/2012 Sequence: 0 *Job Indicator: Primary Job

*Action: Add Person of Interest Reason: Non Payee

Last Start Date: 25/10/2012 Termination Date:

Expected Job End Date: Position Entry Date: 25/10/2012

Position Number: 00003220 POI Supervisor: Position Management Record:

Regulatory Region: AUS Australia

Company: ANU Australian National University

Business Unit: ANUID Australian National University Department Entry Date: 25/10/2012

Department: 56510 Medical School Administration

Location: F042 Peter Baume Building

Establishment ID: Date Created: 01/11/2012

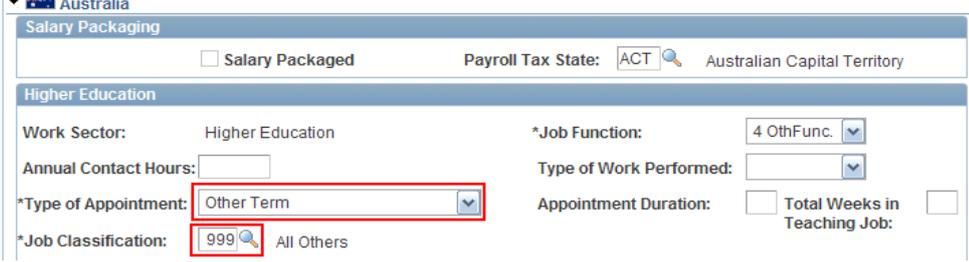
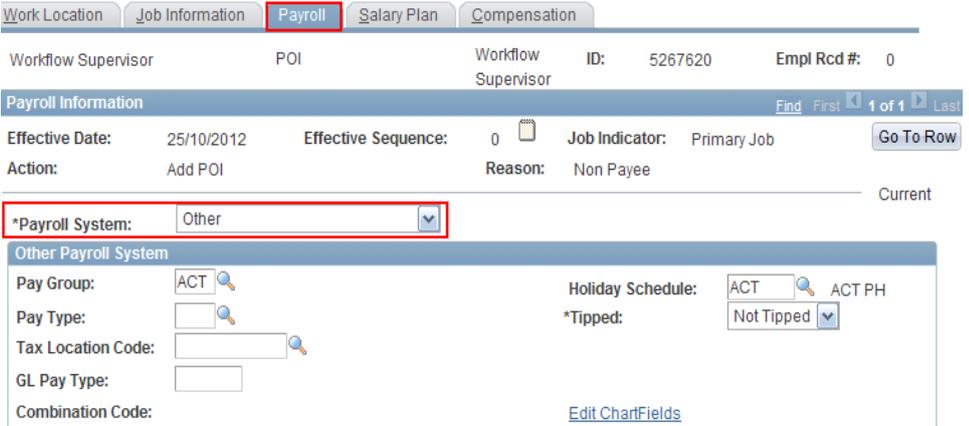
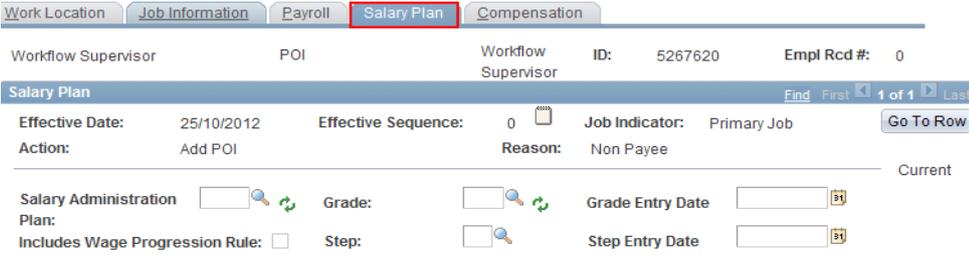
Australia

15.

Job Information

- The **Job Code** HSUP (Supervisor) will default from position data
- The **Reports To** position will default from position data
- The **Regular/Temporary** indicator will default to Regular from position data
- The **Full/Part** time indicator will default as Casual from position data
- The **Officer Code** defaults to None
- The **Superannuation Plan** defaults to N/A
- Shift Rate** is left blank
- Shift Factor** is left blank
- The **Standard Hours** will default as 0.00
Work Schedule does not need to be entered for POI Workflow Supervisor
- FTE** will automatically default to 0.000000
- Contract Number** is left blank
- Payroll Tax State** leave as default
- Work Sector** leave as default
- Job Function** will default to 4 OthFunc.
- Annual Contract Hours** is left blank
- Type of Work Performed** is left blank
- Click the drop down menu for **Type of Appointment** and select Other Term
- Appointment Duration** is left blank
- Total Weeks in Teaching Job** is left blank
- Click on magnifying glass for **Job Classification** and select 999 All Others

Work Location	Job Information	Payroll	Salary Plan	Compensation
POI Workflow Supervisor	POI	Workflow Supervisor	ID: 5267644	Empl Rcd #: 0
Job Information Find First 1 of 1 Last				
Effective Date:	25/10/2012	Effective Sequence:	0	Job Indicator: Primary Job
Action:	Add POI	Reason:	Non Payee	Go To Row
Current				
Job Code:	HSUP	Supervisor	Entry Date:	25/10/2012
Supervisor Level:				
Reports To:	00006541	Dean, Medical School		
*Regular/Temporary:	Regular	*Full/Part:	Casual	
*Superannuation Plan:	N/A	*Officer Code:	None	
		Shift Rate:		
		Shift Factor:		
Standard Hours				
Standard Hours:	0.00			
Work Period:	W	Weekly		
FTE:	0.000000			
Contract #				
Contract Number:				Contract Type:
	Next Contract Number			

	
<p>16.</p>	<p>Payroll</p> <p>Click the drop down menu for Payroll System and select Other Pay Group leave as default Holiday Schedule leave as default Pay Type leave blank Tipped leave as default Tax Location Code leave blank GL Pay Type leave blank</p> 
<p>17.</p>	<p>Salary Plan</p> <p>Leave as is</p> 

18.	<div style="border: 1px solid black; padding: 5px;"> <div style="background-color: #4F81BD; color: white; padding: 2px 5px; display: inline-block; border-radius: 3px;">Compensation</div> <p>Leave as is</p> <p>Work Location Job Information Payroll Salary Plan Compensation</p> <p>Workflow Supervisor: POI Workflow Supervisor ID: 5267620 Empl Rcd #: 0</p> <p>Compensation Find First 1 of 1 Last</p> <p>Effective Date: 25/10/2012 Effective Sequence: 0 Job Indicator: Primary Job Go To Row</p> <p>Action: Add POI Reason: Non Payee Current</p> <p>Compensation Rate: 0.000000 AUD *Frequency: H Hourly</p> <p>Comparative Information</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="4">Pay Rates</th> </tr> </thead> <tbody> <tr> <td>Hourly</td> <td>AUD</td> <td>Monthly</td> <td>AUD</td> </tr> <tr> <td>Fortnight</td> <td>AUD</td> <td>Annual</td> <td>AUD</td> </tr> </tbody> </table> <p>Default Pay Components</p> <p>Pay Components Customise Find First 1 of 1 Last</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Amounts</th> <th>Controls</th> <th>Changes</th> <th>Conversion</th> </tr> <tr> <th>*Rate Code</th> <th>Seq</th> <th>Comp Rate</th> <th>Currency</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>0</td> <td></td> <td></td> </tr> </tbody> </table> <p>Frequency: Points: Percent: Rate Code Group</p> <p>Calculate Compensation</p> </div>	Pay Rates				Hourly	AUD	Monthly	AUD	Fortnight	AUD	Annual	AUD	Amounts	Controls	Changes	Conversion	*Rate Code	Seq	Comp Rate	Currency	1	0		
Pay Rates																									
Hourly	AUD	Monthly	AUD																						
Fortnight	AUD	Annual	AUD																						
Amounts	Controls	Changes	Conversion																						
*Rate Code	Seq	Comp Rate	Currency																						
1	0																								
19.	Click OK																								
20.	You will be taken back to the Organisational Relationships page. Click Save																								
21.	End of Procedure																								