

Manager Self Service: Change Manager - Assign New Direct Reports

This guide will help you use Manager Self Service to change line management arrangements for multiple employees, so that they report to a single manager.

Selecting the manager:

1. Click on 'Change Manager' from the Manager Self Service menu.
2. You need to select the manager who you need to add new direct reports to. Against that person, select 'Action' on the far right hand side of the screen.
3. This will take you to the 'Change Manager' screens.

Note. You can only assign new direct reports where the manager and the affected employees are already within your reporting hierarchy.

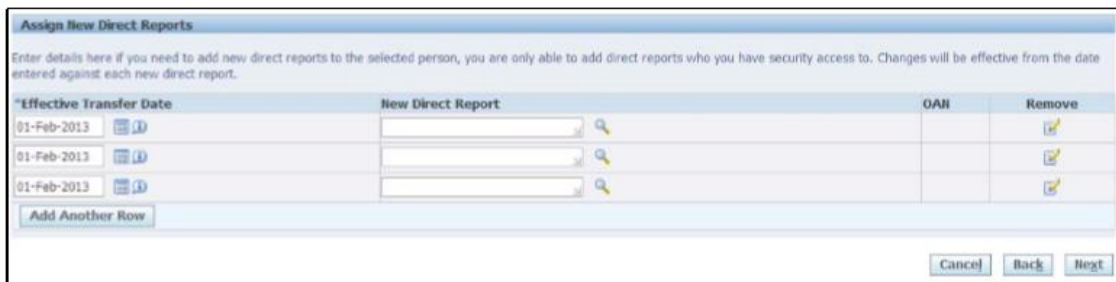
Note. Some employees have multiple assignments. Please be sure to select the correct assignment on this screen.

Enter an effective date:

It is important to enter the correct effective date that the change takes effect from.

1. Check the 'Information' box at the top of the screen. This will tell you when the last change was made to the employee's assignment. This will be the earliest date that your change can be made from.
2. In the effective date box insert the date you wish the change to take effect (this can be selected from the calendar to the right). Note. You are able to make back and future dated changes.
3. Select 'Continue' on the far right hand side of the screen.

Assign New Direct Reports:



Note: Line management information for the employee you have selected will be displayed in the Assign a New Manager section. You should not amend this unless you also need to change their manager.

1. Within the 'Assign New Direct Reports' section, ensure the 'Effective transfer date' is correct. This should display the same date as chosen on the previous page. If you need to amend the date, you can change the details in the 'Effective Transfer Date' field or click on the 'Back' button and start the process again.
2. In the 'New Direct Report' box, search for an employee that needs to report to this manager. Search by inserting the employee's surname followed by % and their forename.
3. Click on the 'magnifying glass' icon.
4. Select the employee from the 'Search and Select list of values' screen that appears by clicking 'Quick Select'.

Note. Some employees have multiple assignments. Please be sure to select the correct assignment.

5. The employee's details will appear in the 'New Direct Report' section.
6. To add more direct reports, select 'Add another row'
7. When you have listed all of the new direct reports, select 'Next'.

Review and Submit:

A review and submit page will be displayed. Review the information. Any changes you have proposed will be indicated by a blue dot. If you need to make any amendments, select 'Back' to return to the 'Change Manager' screen.

At this point, if required, you can add an 'Ad Hoc Approver'. See the guidance below on how to do this.

If you are happy with the changes, select 'Submit'.

Adding an Adhoc Approver:

If you require someone, such as the new manager to approve this change, you need to add them as an additional approver. You do this by selecting the '+' icon next to 'Add Adhoc Approver' on the 'Review and Submit' page. Search for their name in the same way as the previous screen (Surname%Forename). Select 'Add'. This approver will now be added.

Confirmation:

Upon selecting 'Submit' a confirmation screen will appear. If you have added an approver, it will go through to them to approve. If you have not added an approver, your change will be automatically approved and will be effective from the chosen date. You, the new line manager and the affected employee/s will receive a confirmation e-mail that the change has been made.

Help and Support:

Further information on the 'Change Manager' is available on the Change line manager KNet page.

If you have any technical issue, log into Service Now and raise a call by selecting the 'ICT' Service on the left hand side of the screen or alternatively us the 'Chat' function. If you are not able to access Service Now, e-mail ICTservicedesk@cantium.solutions and they will raise a request on your behalf.

If you have an HR related query, log into Service Now and raise a call by selecting the 'Human Resources' Service on the left hand side of the screen or alternatively us the 'Chat' function.

