LOUIE 'Reports To' User's Guide for Viewers

Table of Contents

LOUIE 'Reports To' User's Guide for Viewers

Introduction

Overview
'Reports To' is a function in LOUIE that allows us to keep a record of the reporting structure of the university – who reports to whom. Getting this information into LOUIE prepares the university to use forms that will be created, routed, and 'signed' or approved electronically.

Objective
To make sure that every position listed in your area of responsibility shows a reporting relationship to another position **OR** is marked as a position to be inactivated.

Work Flow
The department Initiator will initiate a form that records all the reporting relationships in that area. After entering all reporting relationship data, the form will be electronically forwarded to the department Approver for review. Some areas will also have a second level Approver. Finally, all forms will be reviewed and approved by designated staff at Human Resources. At any level of approval, a form may be sent back to the Initiator for correction before being sent to the next level of approval. The last step after final approval is when the information is loaded into LOUIE.

Viewing the Status of the Form
You will be able to view the progress of the form and know its status at any point in time during the process.

After reviewing this user guide, if you have any questions about this process, please visit the 'Reports To' web page or contact Human Resources at HR.Contact@nau.edu or 928-523-2223.

If you would like more detailed knowledge about the Initiator or Approver actions, please review the *User's Guide for Initiators* or the *User's Guide for Approvers* found on the Reports To web page.

The 'Reports To' Form Logic

The form has two sections: Benefited Positions and Non-Benefit Eligible Positions. The logic below is used to establish correct reporting relationships and to appropriately inactivate positions. The reporting structure is based on positions reporting to positions (whether there are people in those positions right now or not) so you will be focusing on position numbers – not employee ID numbers.

Benefit Eligible Positions

- A benefit eligible employee should be listed as reporting to the supervisor who completes the performance appraisal and signs ROA's.
- A position may only report to one position; employees with multiple supervisors must be assigned to just one.
- For special assignments that have changed the reporting relationships (ex. a groundskeeper specially assigned to grounds supervisor), please contact HR to temporarily change the position number of the employee. If no change occurs in who reports to a specially assigned employee, they can remain in their current position number.
- If an employee has a benefit eligible position and a non-benefit eligible position (ex. a regular faculty member who also teaches as part-time faculty in the summer), report the primary role's reporting relationship in the benefit eligible section. The part-time role will be reported in a different way in the non-benefit eligible area of the form.

Non-Benefit Eligible Positions

- Non-benefit eligible positions should report to the 'money manager' – the person who typically generates the forms for transactions in these positions. This is not necessarily the faculty or staff member who is responsible for the fund or is the employee's day to day supervisor (ex. show a part-time temporary as reporting to the person who generates their hiring/pay paperwork – not the person who will supervise and direct their work on a day to day basis). These types of positions include:
    - Pool positions occupied by more than one employee (student wage, part-time faculty, graduate assistants, etc.)
    - Positions used to manage funds (mobile phone allowance, salary set-asides, etc.)

Inactivating Positions

- If a position is vacant, but will be used in the near future, do not inactivate it. Establish a 'Reports To' relationship that will be appropriate when the position is filled.
- You may inactivate a position if all the following apply:
    - it is vacant
    - has no identified funding, and
    - it is not currently posted.
- If a position is vacant, but does not have an 'inactivate' checkbox available, you may contact the budget office to inactivate it.

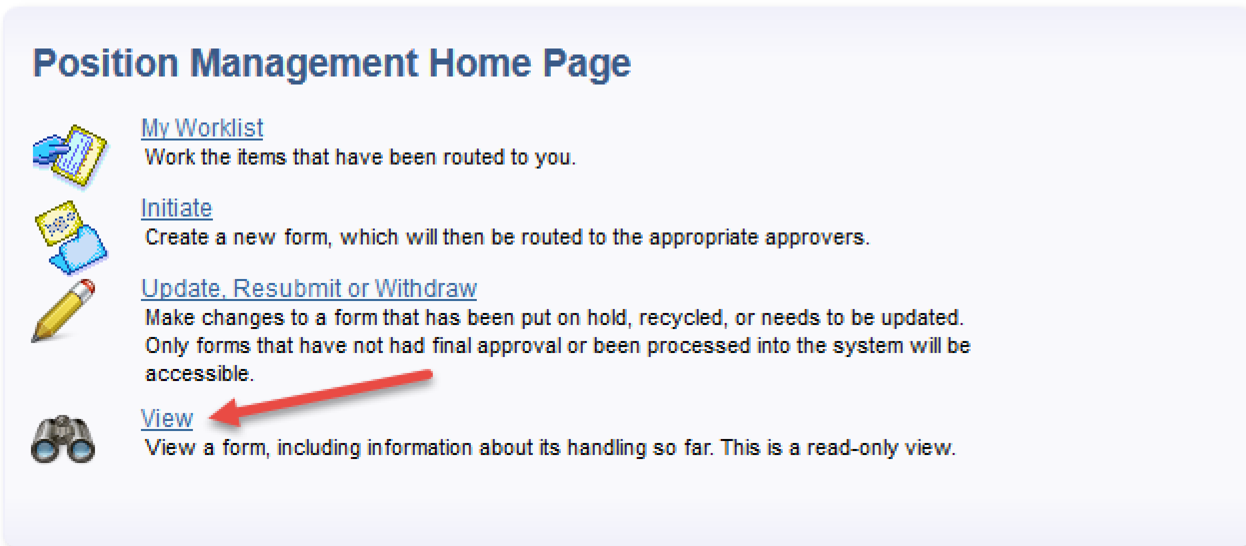
For more examples of common scenarios, visit the '[Reports To' web page](#).

1. Access 'Reports To' in LOUIE

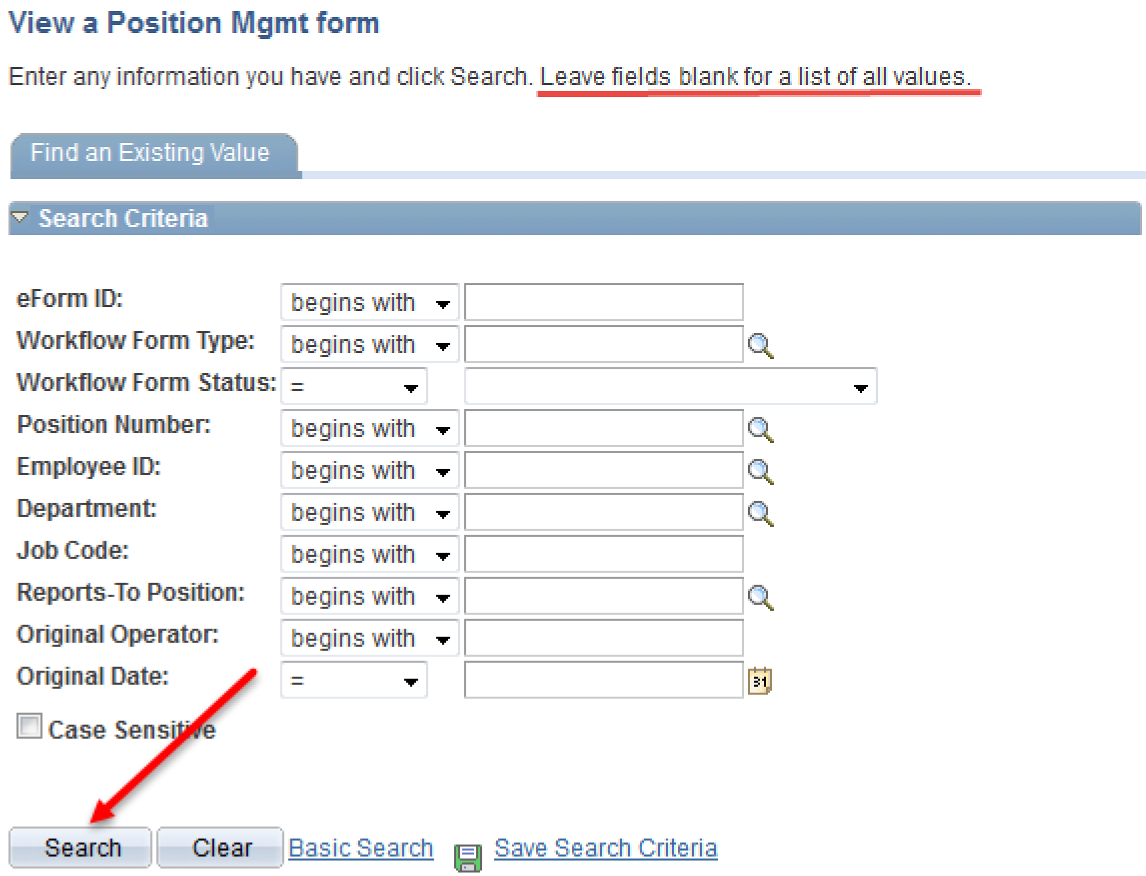
- Log in to LOUIE (http://www4.nau.edu/louie/) using your regular user ID and password
- Navigate to Department Self Service > Position Management Home Page

2. View Forms

When the Position Management Home Page opens, select View.



A search menu will open to allow you to search for all forms you have security access to view. Leave all the fields blank and click 'Search'.



View a Position Mgmt form

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

Find an Existing Value

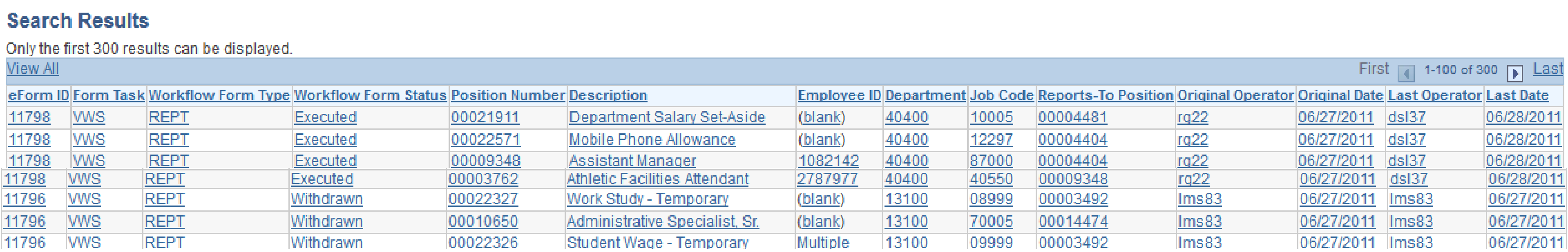
Search Criteria

eForm ID: begins with
Workflow Form Type: begins with
Workflow Form Status: =
Position Number: begins with
Employee ID: begins with
Department: begins with
Job Code: begins with
Reports-To Position: begins with
Original Operator: begins with
Original Date: =

Case Sensitive

Search Clear Basic Search Save Search Criteria

A list of all forms you have access to will be presented in the search results. Select the form you would like to view.



Search Results

Only the first 300 results can be displayed.

View All First 1-100 of 300 Last

eForm ID	Form Task	Workflow Form Type	Workflow Form Status	Position Number	Description	Employee ID	Department	Job Code	Reports-To Position	Original Operator	Original Date	Last Operator	Last Date
11798	VWS	REPT	Executed	00021911	Department Salary Set-Aside	(blank)	40400	10005	00004481	rg22	06/27/2011	dsl37	06/28/2011
11798	VWS	REPT	Executed	00022571	Mobile Phone Allowance	(blank)	40400	12297	00004404	rg22	06/27/2011	dsl37	06/28/2011
11798	VWS	REPT	Executed	00009348	Assistant Manager	1082142	40400	87000	00004404	rg22	06/27/2011	dsl37	06/28/2011
11798	VWS	REPT	Executed	00003762	Athletic Facilities Attendant	2787977	40400	40550	00009348	rg22	06/27/2011	dsl37	06/28/2011
11796	VWS	REPT	Withdrawn	00022327	Work Study - Temporary	(blank)	13100	08999	00003492	lms83	06/27/2011	lms83	06/27/2011
11796	VWS	REPT	Withdrawn	00010650	Administrative Specialist, Sr.	(blank)	13100	70005	00014474	lms83	06/27/2011	lms83	06/27/2011
11796	VWS	REPT	Withdrawn	00022326	Student Wage - Temporary	Multiple	13100	09999	00003492	lms83	06/27/2011	lms83	06/27/2011

The form will open for you to view. In this 'read only' mode, you will not be able to make changes to the form – the 'reports to position number' field is static.

Benefited Positions Personalize | Find |

	Position Number	Job Title	Empl ID	Emp Name	Inactivate Position?	Reports To Position Number	Reports To Job Title	Reports To
1	00001331	Lecturer	[redacted]	Varela-Lago,Ana Maria		00001347	Chair	1170122
2	00001332	Associate Professor	[redacted]	Danielson,Leilah Claire		00001347	Chair	1170122
3	00001335	Instructor		Vacant		00001347	Chair	1170122

Position Information

You can, however, click on the live link position number in the 'Position Number' column to get more information about the funding source(s), job code, and date the position was created.

Position Info

Help

Position Created: 07/01/1997

Position Number: 00001331

Job Title: Lecturer

Department: 10215

Job Code: 92099

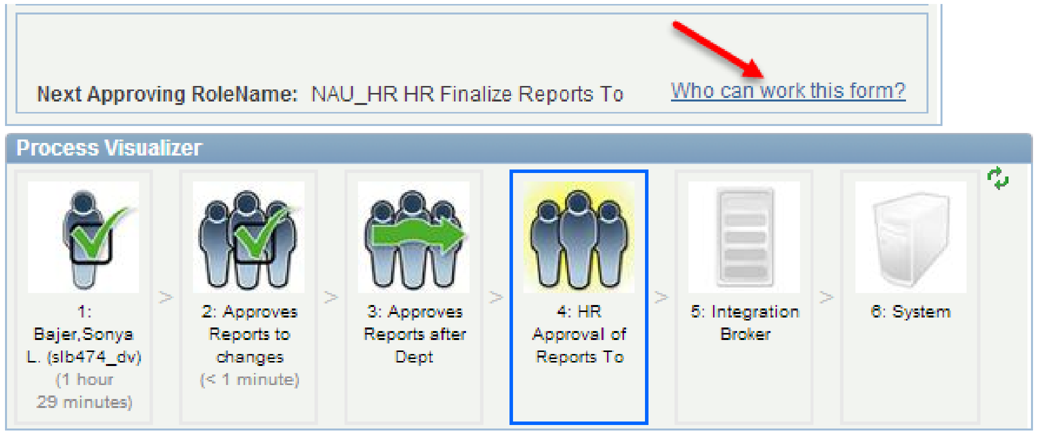
PF Department	Fund	Program	Project	Budget Use Only	Percent of Distribution
2070010	1100	A001			100.000

Return

Scroll to the bottom of the form and click 'Next' to see the Form History screen.

<< Previous	Next >>
<< Search	Cancel

In the **Form History** screen, the ‘Process Visualizer’ will show where the form currently is in the approval process. A green check mark indicates that the step is completed. A green wavy arrow indicates the step is skipped (no second level approver in this case). A blue box outline shows which step the form is in at the moment. A blue arrow pointed left indicates an approver has ‘recycled’ the form back to the Initiator for corrections.



Transaction Log

	Current DateTime	Role Name	User ID	User Description	Form Action	Workflow Form Status
1	05/16/2014 2:49:34PM	NAU_HR Reports To Initiator	slb474_dv	Bajer,Sonya (BA)	Submit	Pending
2	05/16/2014 4:18:40PM	NAU_HR Reports To Initiator	slb474_dv	Bajer,Sonya (BA)	Resubmit	Pending
3	05/16/2014 4:19:11PM	NAU_HR Dpt Reports To Approver	jdm8	Verkest,J Diane	Approve	Part Apprv

By clicking on ‘Who can work this form?’ you’ll be able to see a list of those who are authorized to take the next action (if any) on the form. It will also provide an active link to their email address.

Current Form Worklist Items

cs22	Snow,Mary C	Cathy.Snow@nau.edu
dsl37	LaPier,Diana Sue Anderson	Diana.LaPier@nau.edu
jem254	MacKenzie,Jo Elizabeth	Jo.MacKenzie@nau.edu
mad227	Fousek,Melissa Ann	Melissa.Dwyer@nau.edu
mrw1	Wallace,Michele Rene	Michele.Wallace@nau.edu

The ‘transaction log’will provide details of who has taken different actions on the form throughout the process.

Transaction Log

	Current DateTime	Role Name	User ID	User Description	Form Action	Workflow Form Status
1	05/16/2014 2:51:39PM	NAU_HR Reports To Initiator		Bajer,Sonya (BA)	Submit	Pending
2	05/16/2014 2:55:09PM	NAU_HR Reports To Initiator		Bajer,Sonya (BA)	Hold	On Hold
3	05/28/2014 12:55:39PM	NAU_HR Dpt Reports To Approver		McConnell,Kathleen Anne	Approve	Part Apprv