



University Performance Management Maintain Reporting Relationships Tool


The **Maintain Reporting Relationships** tool is used to maintain **Manager – Employee and HR Administrative** – Manager relationships for use in University Performance Management. The manager – employee relationship is used to create performance review documents as well as update the manager of the review in the case of employee transfer.

The tool is located on the Duke@Work > MyInfo > MyTeam tab

iForms | Grants Management | Universal Worklist | dFac | Budget | **MyInfo**

Home | MyProfile | MyBenefits | MyTime | MyPay | MyExpenses | **MyTeam**

Home > Home > MyTeam

 This link is used by DUHS and University employees using the and attendance/staffing and scheduling system to approve employee requests, edit time cards, view Laborviews and report manage schedules (applicable departments) and approve empl time cards.

[Go to the Time and Attendance System](#)

Manage My Employee's Time (Electronic Time Reporting)

[Approve Current Period Biweekly Timecards - 07/28/2014-08/10/2014](#)

- Approve Timecards for Biweekly Staff in University Departments
- Approve Timecards as the primary approver
- Approve Timecards as a backup approver

[Approve Exempt Time Off \(University Depts\)](#)

- Approve Time Off for Monthly Staff in University Departments

[Review Approval Roles](#)

- Review your backups approvers.
- Review the people you backup.

Performance Management - DUHS

[Performance Reviews](#)
Performance Reviews.

[Manage Expected Job Results \(07/01/2014 - 06/30/2015 Reviews\)](#)
2015 DUHS Performance Management Expected Job Results (EJRs)

[Administrative Delegate Maintenance](#)
This function allows a manager to add an administrative delegate for performance management.

[Performance Reviews - Delegates](#)
Performance Management (Delegates)

Performance Management - UNIVERSITY

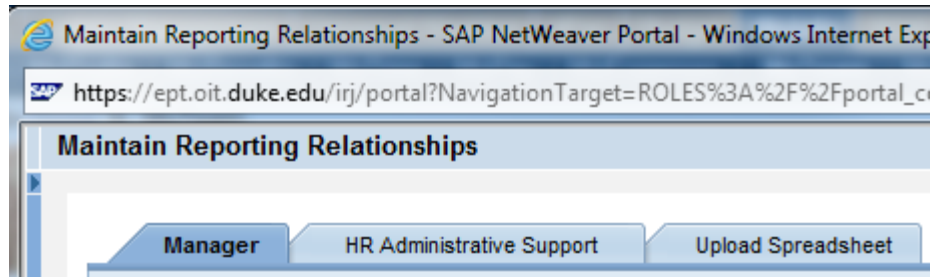
[Maintain Reporting Relationships](#)
University Performance Management Maintain Reporting Relationships

[Performance Reviews](#)
Performance Reviews.

To launch the tool, click on “Maintain Reporting Relationships” link.



University Performance Management Tool



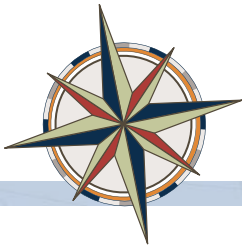
There are three tabs to the tool:

1. **Manager** - used to create and maintain manager to employee reporting relationships
2. **HR Administrative Support** – used to create and maintain HR administrative support to manager relationships.
3. **Upload Spreadsheet** – used to upload manager and HR administrative support relationships via spreadsheet

Instructions for using the Maintain Reporting relationships tool

Manager Tab

The manager tab is used to create performance management reporting relationships. The user will select a manager and then build the list of direct reports. The reporting relationships are position to position so when there is movement in/out of a position, no further administrative action is required for performance management.



University Performance Management Tool

Select Manager – enter the DUID of the manager

Select Manager

DUID: 309768

Or click on the icon next to the DUID and search by name:

All Values: Personnel number

Search Criteria

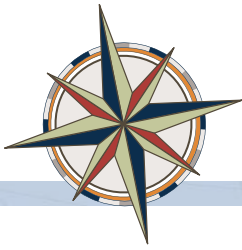
Last name:

First name:

Start Search Reset

< >

OK Cancel



University Performance Management Tool

Manager tab layout

Header Data

DUID: Duke Manager 00309768 PSA: EXEMPT 0001
Org Unit/Desc: SAP-Administrative Systems Management 50000103 Position/Desc: ANALYST, IT, SENIOR 50005487
Personnel Area: CENTRAL ADMIN MANAGEMENT CTR 1010 Email: DUKE.MANAGER@DUKE.EDU

HR Administrative Support 1 Unique ID: 00009126 Name: MARY SIMPSON

HR Administrative Support 2 Unique ID: 00000000 Name:

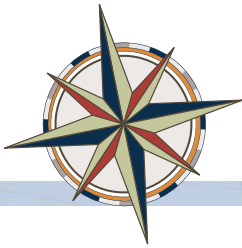
Name	Unique ID	Position	Payroll Area	Org Key	Org Unit	BFR	Org Name
GEORGE THROUGHGOOD	00003267	50560420	UM	DDKK	50000483	6056103000	NSOE ESP Div
BARRY BROWN	00008114	50018392	UM	DDSO	50000905	6860203025	Child & Fam Mental Health & Dev Neuro

To add direct reports (employees) to a manager

1. Click **Insert Row** to add new direct reports

Name	Unique ID	Position	Payroll Area	Org Key	Org Unit	BFR	Org Name
BARRY BROWN	00008114	50018392	UM	DDSO	50000905	6860203025	Child & Fam Mental Health & Dev Neuro
GEORGE THROUGHGOOD	00003267	50560420	UM	DDKK	50000483	6056103000	NSOE ESP Div
	00000000	00000000				00000000	

A new row is added with 00000000 for DUID, click into the field and key in the DUID, hit enter. The new employee is added to the list.



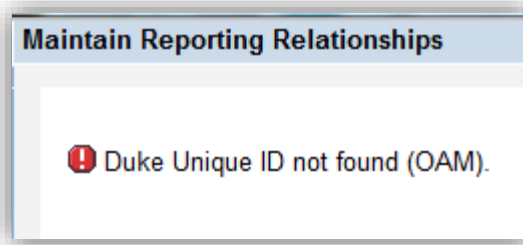
University Performance Management Tool

Insert Row		Export						
Employees								
Name	Unique ID	Position	Payroll Area	Org Key	Org Unit	BFR	Org Name	
BARRY BROWN	00008114	50018392	UM	DDSO	50000905	6860203025	Child & Fam Mental Health & Dev Neuro	
GEORGE THROUGHGOOD	00003267	50560420	UM	DDKK	50000483	6056103000	NSOE ESP Div	
MARY SIMPSON	00009126	50937913	UM	DD31	50000850	6860201525	Medicine-Endocrinology and Metabolism	

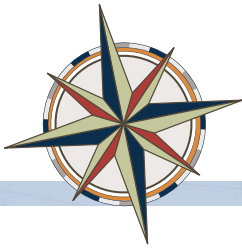


Click **Save** to save the employee assignment.

Note: There is no “delete” function for manager – employee assignments. Once an employee has been assigned to a manager, that relationship must exist, i.e. you cannot create an orphan assignment (employee with no manager)



Note: If you encounter this error message, it is because you do not have security rights to the employee that you are attempting to insert.



University Performance Management Tool

HR Administrative Support Tab

The HR Administrative Support tab is used to create a relationship between an HR administrative support staff person and manager to provide performance review access to the HR administrative support person. To begin, click the **HR Administrative Support Tab**. Fill in the DUID. Next select and enter the **Manager**. Behind the scenes, the tool will create a relationship between the manager position and employee position.

HR Administrative Support tab layout

HR Admin Data

Managers supported by the HR Admin

To add managers to the HR administrative support person

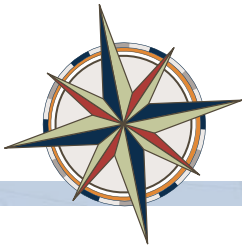
2. Click **Insert Row** to add managers to the HR administrative support

Name	Unique ID	Position	Payroll Area	Org Key	Org Unit	BFR	Org Name
Duke Manager	00309768	50005487	UM	DDGV	50000103	3224000901	SAP-Administrative Systems Management
	00000000	00000000			00000000		

A new row is added with 00000000 for DUID, click into the field and key in the DUID, hit enter. The new manager is added to the list.

Name	Unique ID	Position	Payroll Area	Org Key	Org Unit	BFR	Org Name
Duke Manager	00309768	50005487	UM	DDGV	50000103	3224000901	SAP-Administrative Systems Management
JOSEPH N NEELEY	00282169	50034260	UM	DDGV	50000103	3224000901	SAP-Administrative Systems Management

Click **Save** to save the manager assignment.



University Performance Management Tool

Upload Spreadsheet Tab

Create an Excel spreadsheet in the following format, and save it to your computer.

Column	A	B	C
Field Contents	H or M	Position Number	Position Number
Description	H = HR Administrator M = Manager	If Column A = "H" this should be the position number of the HR Administrator If Column A = "M" this should be the position number of the Manager	If Column A = "H" this should be the position number of the Manager If Column A = "M" this should be the position number of the Employee

Example:

	A	B	C	D	E	F	G
1	H	50673108	50011468				
2	H	50673108	50031995				
3	H	50673108	50034260				
4	H	50673108	50030379				
5	M	50022099	50806046				
6	M	50022099	50432709				
7							

Creation of Spreadsheet

The Active Employee Roster report can be used as the source for your spreadsheet. This report can be found by navigating in Duke@Work to iForms > Reporting > HR Reports > click on "Active Employee Roster" report.



University Performance Management Tool

Duke @ WORK

Home | iForms | MyInfo | Universal Worklist | Candidate Selection | Finance

Home | Staff | Positions | Employee Search | iForms Overview | Reporting

... Reports > Faculty Web Navigation iView > Faculty Web Navigation iView >

 [Active Employee Roster](#)
List of all employees that are currently in an active status for a specific org unit(s).

When the report is launched, the user will be able to select from the list of Organization Unit numbers listed. If the user desires to run for ALL organization units they have access to, just click “OK”.

Variable Entry

Available Variants: Save Save As... Delete [Show Variable Personalization](#)

General Variables		
Variable	Current Selection	Description
Org Unit (Authorization)	+50879238(OORGUNIT)	6860506500 - Duke Molecular Physi

The report results may be exported to an Excel Spreadsheet by clicking on Export/Print Options, and selecting Excel option.

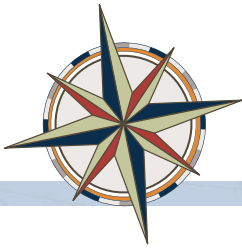
Active Employee Roster

Active Employee Roster

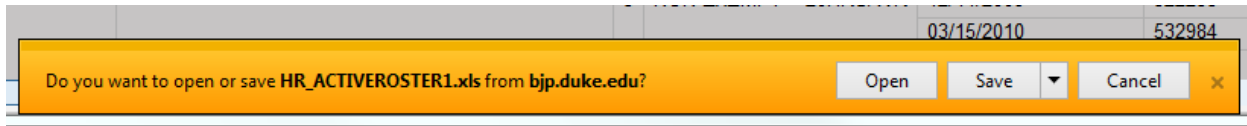
Query Options

Export/Print Options ▾ Query Personalization ▾ Refresh Query ▾

The system will ask you what you want to do next:

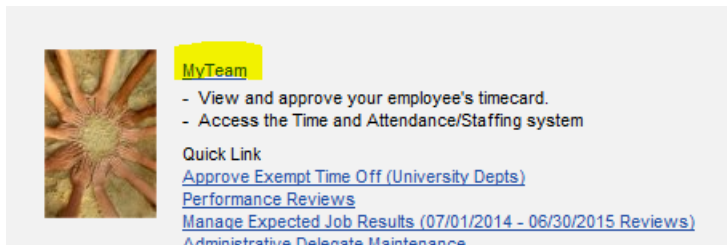


University Performance Management Tool

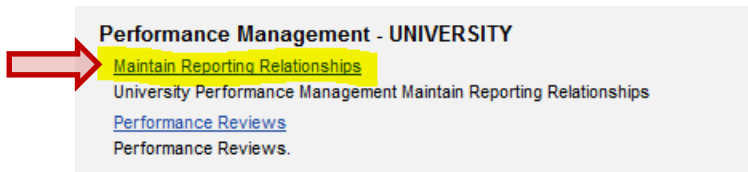


Click Open to open up the spreadsheet. See above for required spreadsheet upload format.

When spreadsheet is ready for uploading, go to [Duke@Work](#) and click the **MyTeam** link:



Scroll to the “**Performance Management – UNIVERSITY**” section of the page, and click the “**Maintain Reporting Relationships**” link:





University Performance Management Tool

To upload your spreadsheet, click the “**Upload Spreadsheet**” tab on the Maintain Reporting Relationships tool:

Name	Unique ID	Position	Payroll Area	Org Key	Org Unit	BFR	Org Name

Click the **Browse** button to search for your spreadsheet:

Upload File **Browse...** Test Mode

When your file appears in the Upload File field, click the **Upload** button (this could take several seconds). By default, Test Mode is checked. You may uncheck this box to run without testing.

Upload File **Upload**

