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.

To launch the tool, click on “Maintain Reporting Relationships” link.
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.
Select Manager – enter the DUID of the manager

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

To add direct reports (employees) to a manager
1. Click **Insert Row** to add new direct reports

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.
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.
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 Administrative Support Tab Layout](image)

**To add managers to the HR administrative support person**

1. **Click [Insert Row]** to add managers to the HR administrative support

![Manager Insert Row](image)

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.

![Manager Insert Row Result](image)

2. **Click [Save]** to save the manager assignment.

![Manager Save](image)
Upload Spreadsheet Tab

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

<table>
<thead>
<tr>
<th>Column</th>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Contents</td>
<td>H or M</td>
<td>Position Number</td>
<td>Position Number</td>
</tr>
<tr>
<td>Description</td>
<td>H = HR Administrator M = Manager</td>
<td>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</td>
<td>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</td>
</tr>
</tbody>
</table>

Example:

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>H</td>
<td>50673108</td>
<td>50011468</td>
</tr>
<tr>
<td>H</td>
<td>50673108</td>
<td>50031995</td>
</tr>
<tr>
<td>H</td>
<td>50673108</td>
<td>50034260</td>
</tr>
<tr>
<td>H</td>
<td>50673108</td>
<td>50030379</td>
</tr>
<tr>
<td>M</td>
<td>50022099</td>
<td>50806046</td>
</tr>
<tr>
<td>M</td>
<td>50022099</td>
<td>50432709</td>
</tr>
</tbody>
</table>

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.
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”.

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

The system will ask you what you want to do next:
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:
To upload your spreadsheet, click the “Upload Spreadsheet” tab on the Maintain Reporting Relationships tool:

Click the Browse button to search for your spreadsheet:

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.
When the upload is complete, you will see the relationships inserted successfully, and if errors occur, they will be listed at the bottom.