SIU Manager Self-Service Instructions

1) Log into Oracle EBS normally.
2) Select the “SIU Manager Self-Service” or “SIU Manager Self-Service (View Only)” responsibility. All supervisors will have the “SIU Manager Self-Service (View Only)” responsibility by default. Only those with elevated access will have the “SIU Manager Self-Service” responsibility.

SIU Manager Self-Service – This responsibility is available only to users that have been granted elevated access to the Manager Self-Service system. This access is granted only after an AIS Security request form has been processed. This responsibility shares many of the same functions as the “View Only” version. However, with elevated access, the user can now make modifications to the employees and the supervisors to whom they report. Please note that this function is limited to employees within the same organization ID as the user.

   a) View Manager Tree – Click here to view those employees with assignments that report to you. This will open a new tab in your browser. This function has an “Advanced Search” that allows the user to see assignment and supervisor information about other employees. It also shows the logged in user’s direct reports / hierarchy tree.

   • You can hover your mouse over the “Details” button to view a popup of the information.

   • You can also click on the “Details” button to show more information about that employee.
• You can also click on the “Actions” icon to launch the “Change Manager” function. This is the same as the “Change Manager” function from the application. You can get to it either way. If you chose this method, simply click “Start” below.

• This will take you to another screen for “Effective Date”. Choose the effective date for the change and press “Continue”.

• Using Search / Advanced Search – This is the only way to make changes to supervisor information that is not directly related to the currently logged in user.
1. For basic searches, enter the name of the employee you are looking for (LastName, FirstName MiddleInitial) and click “Go” to proceed.

2. For advanced searches, click on “Advanced Search”.

3. Simply fill in the appropriate fields and click “Go”. The results will be displayed in the same fashion as the “View Manager Tree”. Available options will be to click on “Details” or “Action”. Clicking “Details” will display detailed information about the employee. Clicking “Action” will take you to the same screen as the “Action” button from the “View Manager Tree” function.

- Other page functions –
  1. Click “Back” to return to the previous screen.
  2. Click “Home” to return to Oracle EBS menu.
  3. Click “Logout” to log out of Oracle EBS.

- Note: If this window was launched from the Java application, “Home” and “Logout” will not be displayed. Instead you will see a “Close Window” option. Click “Close Window” to close the tab in your browser, or simply click the “X” on the tab as you normally would.

b) Change Manager – This menu function provides the edit actions for modifying employee assignment supervisor information. You can assign a new manager, reassign direct reports to a new manager, or assign new direct reports to the selected employee. Please note, using this menu function only allows changes to the currently logged in user. In order to make changes to another user, the “View Manager Tree” function must be selected and then use the “Search” or “Advanced Search” functions. See the section of these instructions for “View Manager Tree”, subsection “Search / Advanced Search” for more information.
1) **Assign a New Manager** – This section displays the current supervisor for the selected employee. To change the supervisor, remove the name that is in the field and enter the name of the new supervisor. If you are unsure of the full name of the supervisor, a search function is available. Simply type in the portion of the name you know and click the magnifying glass.

a. Once the new supervisor has been selected, that name will now display in the field. Select the appropriate “Effective Date” at the bottom of the screen and click “Next”.

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**Administrative Information Systems**

**SIU Manager Self Service**

**View Manager / Change Manager**

**Effective Date**: 21 May 2019

**Employee Name**: [Name]

**Department**: [Department]

**Assign a New Manager**

You can assign the selected position to a new manager in the field below.

- **Manager**: [Name]
- **Effective Date**: [Date]

**Assign New Direct Reports to a New Manager**

You can assign all direct reports to the same new manager or make individual manager assignments below.

- **Direct Report's Manager**: [Name]
- **Effective Date**: [Date]

**Assign New Direct Reports**

You can assign new direct reports to the selected position in the list below.

- **Effective Date**: [Date]
- **New Direct Report**: [Name]

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**Southern Illinois University**

**Administrative Information Systems**

**SIU Manager Self Service**

**Search and Select List of Values - Melissa Frigo**

**Search and Select New Manager**

- **Search**: [Name]
- **Select**: [Name]

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**Assign New Manager**

You can assign the selected position to a new manager in the field below.

- **Manager**: [Name]
- **Effective Date**: [Date]

**Assign New Direct Reports**

You can assign new direct reports to the selected position in the list below.

- **Effective Date**: [Date]
- **New Direct Report**: [Name]
b. A verification page will display the proposed changes. Review the information and click “Submit” if everything is correct.

c. Lastly, a confirmation page will display that the changes have been submitted.

d. Click “Home” to return to the menu.

2) Reassign Direct Reports to a New Manager – Using this section, you can assign all direct reports to the same new manager or make individual manager assignments. Follow the same instructions as in “Assign a New Manager” to complete these changes.

3) Assign New Direct Reports – Using this section, you can assign new direct reports to the selected employee. Follow the same instructions as in “Assign a New Manager” to complete these changes.

c) Supervisor Maintenance – This launches an APEX application in a tab in your browser. This application will allow you to either run an audit report of employees by supervisor, or run a report on assignments missing a supervisor.
• **Audit Report of Employee by Supervisor** –
  a. Select the desired supervisor from the drop down menu to display the employees that have assignments reporting to that supervisor.

![Audit Report of Employees by Supervisor](image)

  b. Click arrows beside the names to expand or collapse that section. You can also choose to collapse or expand all by using the “Collapse All” and “Expand All” buttons on the lower right.
  c. Click “Return to AIS” to return to AIS.
  d. Click the “Home” button under “Supervisor Maintenance” to choose another report.

• **Assignments Missing Supervisors** –
  a. Select the organization in which you want to find assignments that are missing supervisors. This will display a list of all employees with assignments that are missing supervisors.

![Assignments Missing Supervisors](image)

  b. Once the list has been populated, you can also search for rows containing specific text by using the search feature in the above picture.
  c. Clicking the “Actions” button displays a pulldown menu that allows you to download the results, filter the columns displayed, as well as other various tools.
  d. Click “Return to AIS” to return to AIS.
  e. Click the “Home” button under “Supervisor Maintenance” to choose another report.