

LOUIE ‘Reports To’ User’s Guide for Viewers

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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.

Position Management Home Page

 [My Worklist](#)
Work the items that have been routed to you.

 [Initiate](#)
Create a new form, which will then be routed to the appropriate approvers.

 [Update, Resubmit or Withdraw](#)
Make changes to a form that has been put on hold, recycled, or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.

 [View](#) 
View a form, including information about its handling so far. This is a read-only 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 

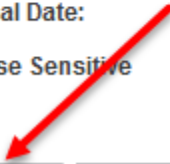
Job Code: begins with


Reports-To Position: begins with 

Original Operator: begins with

Original Date: = 

Case Sensitive



[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 [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 | rq22 | 06/27/2011 | dsi37 | 06/28/2011 |
| 11798 | VWS | REPT | Executed | 00022571 | Mobile Phone Allowance | (blank) | 40400 | 12297 | 00004404 | rq22 | 06/27/2011 | dsi37 | 06/28/2011 |
| 11798 | VWS | REPT | Executed | 00009348 | Assistant Manager | 1082142 | 40400 | 87000 | 00004404 | rq22 | 06/27/2011 | dsi37 | 06/28/2011 |
| 11798 | VWS | REPT | Executed | 00003762 | Athletic Facilities Attendant | 2787977 | 40400 | 40550 | 00009348 | rq22 | 06/27/2011 | dsi37 | 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 Waqe - 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 | | | | | | | | |
|---------------------|---------------------------------|---------------------------|-------------------------|--------------------------|--------------------------------------|--|--------------------------------------|----------------------------|
| | Position Number | Job Title | Empl ID | Emp Name | Inactivate Position? | Reports To Position Number | Reports To Job Title | Reports To |
| 1 | 00001331 | Lecturer | | Varela-Lago,Ana Maria | <input type="checkbox"/> | 00001347 | Chair | 1170122 |
| 2 | 00001332 | Associate Professor | | Danielson,Leilah Claire | <input type="checkbox"/> | 00001347 | Chair | 1170122 |
| 3 | 00001335 | Instructor | | Vacant | <input type="checkbox"/> | 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.

Next Approving RoleName: NAU_HR HR Finalize Reports To [Who can work this form?](#)

Process Visualizer

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