

complyND[✓] – Trainee/Dotted-line Supervisor Relationship Set-up

Dotted-Line Supervisor Assignment

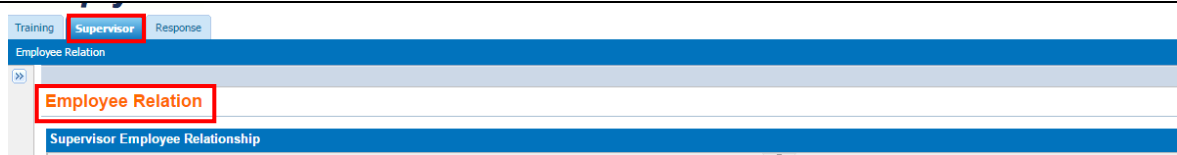
The Department Administrator is responsible for maintaining all the dotted-line supervisor/employee relationships within the department. A dotted-line relationship must exist in order for a person who is NOT an employee's direct supervisor to assign training to them. For example, a person working in a lab would need lab-specific training, but the lab supervisor who must assign that training might not be the employee's direct supervisor.

NOTE: *An employee can have a maximum of ten (10) dotted-line supervisor/employee relationships

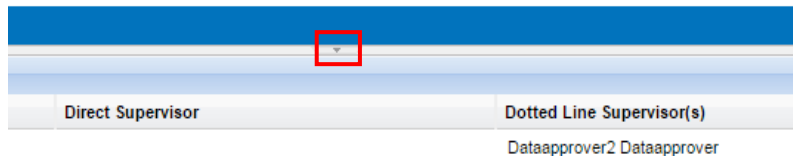
Log in at **comply.nd.edu** and then:

1. Click on the **Supervisor** tab.
2. This will open the **Employee Relation** infoport where you can set up the Supervisor/Employee relationship.

NOTE: You must setup one relationship in this screen before multiple relationships can be created



3. Click on the small drop-down arrow in the middle of the header to open the search filters.
4. Search for the employee who needs the dotted-line supervisor.
5. Use the wild-card character before and after the name of the employee. For example, if you are looking for Mary Smith, you can search for %Mary S%, to find any name with "Mary S" in it
6. Click **Submit**.



Employee Relation

Supervisor Employee Relationship

Search Employee Email

Search Supervisor Type

7. Once you have located the correct employee, click the **Edit** link in the **Assign Dotted line** column.

Report Data as of: 05/27/2015 09:42 AM

Employee	Email	Direct Supervisor	Dotted Line Supervisor(s)	Assign Dotted Line
▶ Mary Swift	nc compliance8@gmail.com			Edit
▶ Mary Smith	noreply@nd.edu		Donna Thompson	<input type="button" value="Edit"/>
▶ Mary Szekendi	nc compliance8@gmail.com			Edit

8. Use the search filter to find the name of the employee who will be Mary Smith's dotted-line supervisor.

9. For example, if you are looking for Jenny Clark, you could search for %Clark%.

10. Click **Filter**.

> Supervisor Employee Relationship > Employee Relation

Email

Search Employee

11. In the **Users** infoport, check the box in the **Select** column in the row with the required dotted-line supervisor's name.

12. Click the button with the two right-facing arrows.

NOTE: If you need to remove a dotted-line supervisor, check the box in the **Select** column in the

Available Users

Users

Select	Employee	Email Address
<input type="checkbox"/>	Elizabeth Clark	nc compliance8@gmail.com
<input checked="" type="checkbox"/>	Jenny Clark	noreply@nd.edu

Dotted Supervisors

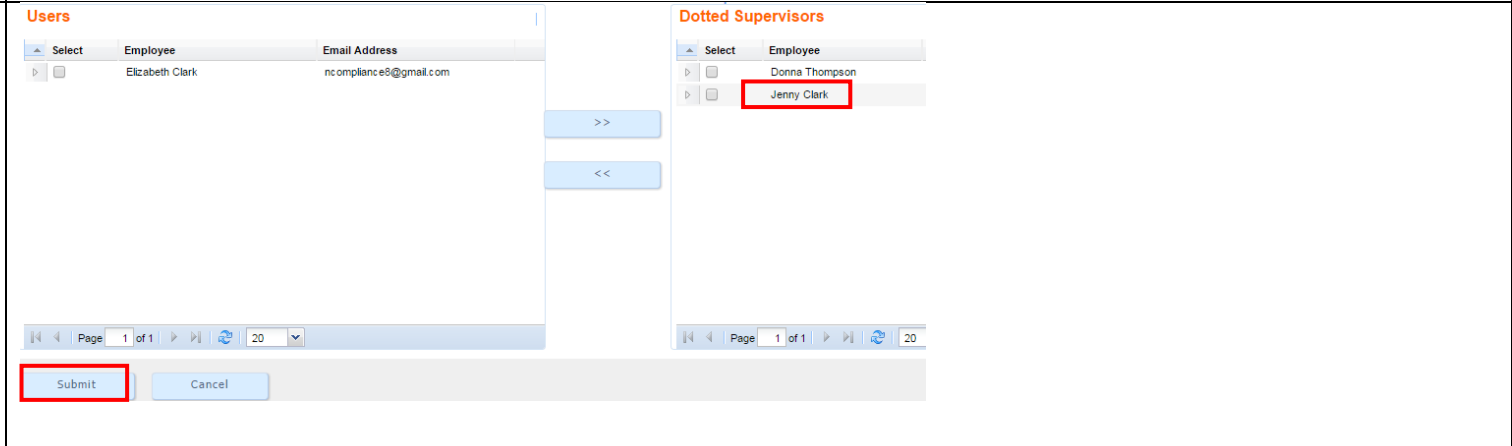
Dotted S

Select
<input type="checkbox"/>

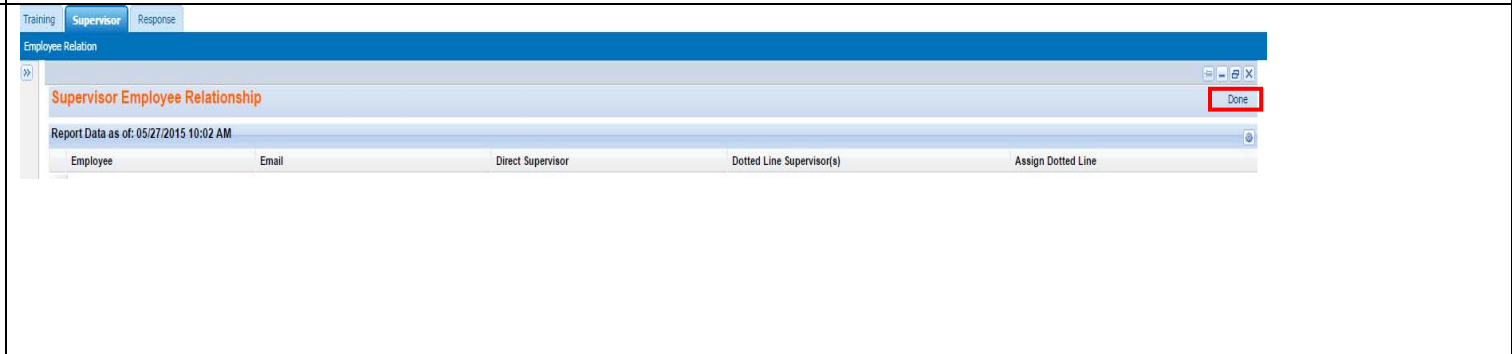
Dotted Supervisors pane and click the left-facing double arrows.



- 13. Jenny Clark is now listed as a dotted-line supervisor for Mary Smith in the Dotted Supervisors screen on right side of page.
- 14. Click **Submit**.

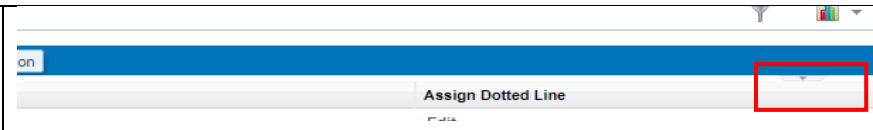

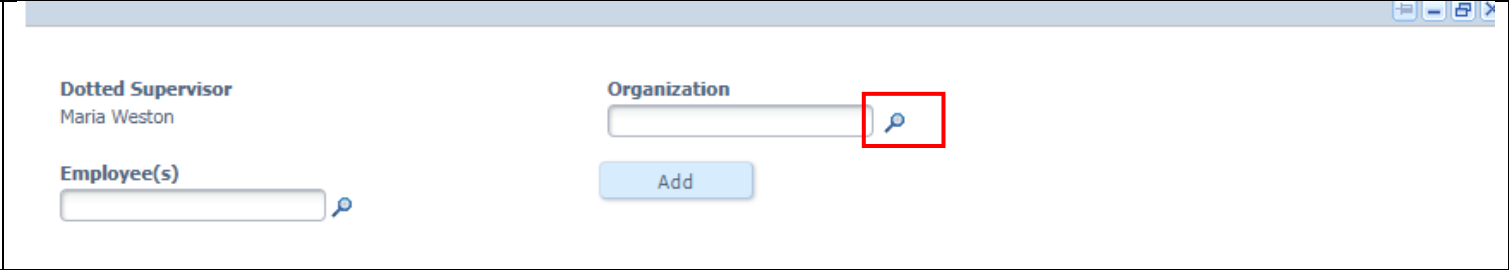
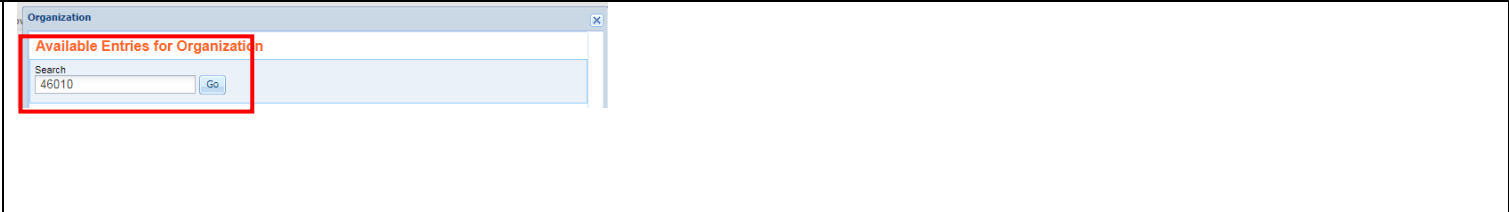


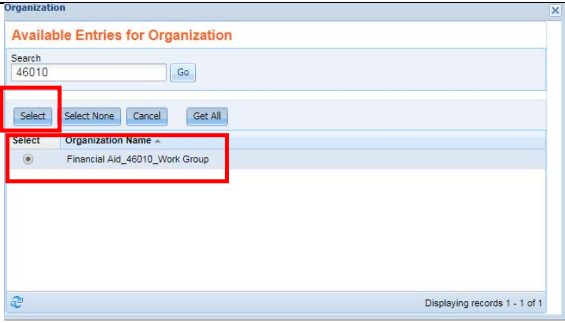
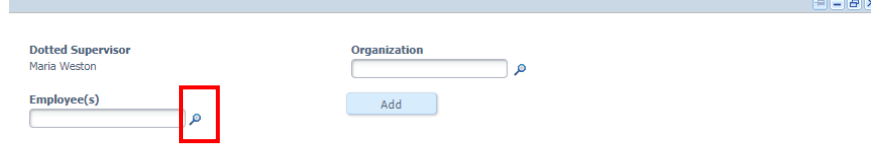
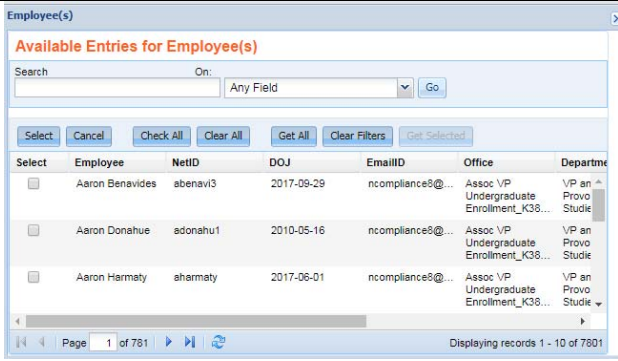
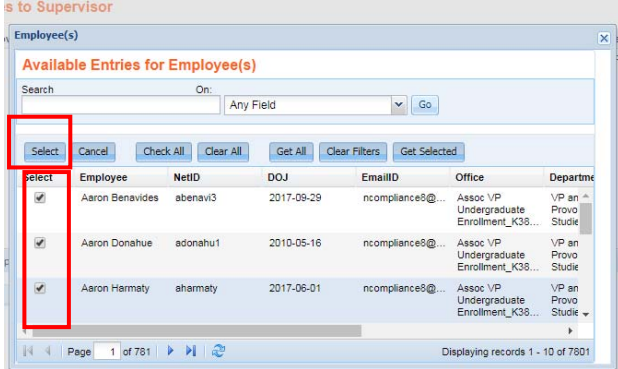
- 15. In order to create another dotted-line relationship or to check the relationship you just created, click **Done** on the **Supervisor Employee Relationship** infoport.



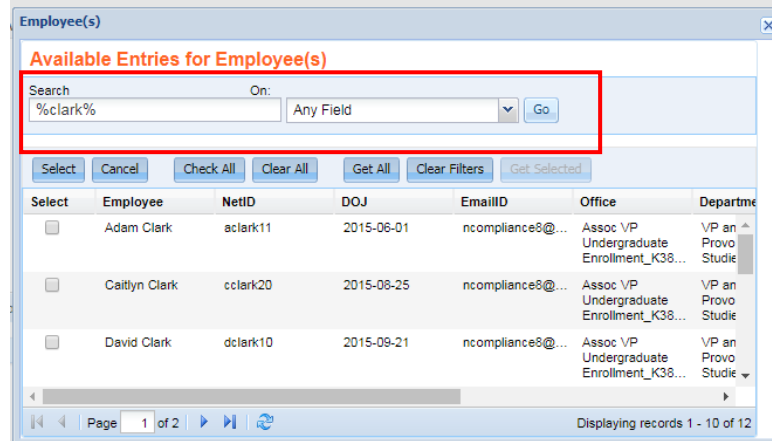
- 16. To create additional dotted-line relationships, click **Dotted Supervisor Relation** in the menu bar.



<p>17. Click on the small drop-down arrow in the middle of the header to open the search filters</p> <p>18. Use the search filter to find the name of the employee needs to be setup as a multiple dotted-line supervisor.</p> <p>19. For example, if you are looking for Maria Weston, you could search for %Weston%.</p> <p>20. Click Submit.</p>	 <p>Assign Dotted Line</p> <p>Dotted Supervisor Relation</p> <p>Dotted Line Supervisor(s) Relationship</p> <p>Search Supervisor: %Weston%</p> <p>Submit Clear All</p>				
<p>21. In the Dotted Line Supervisor infoport, click Edit in the row with the required dotted-line supervisor's name.</p>	 <p>Submit Clear All</p> <p>Dotted Line Supervisor(s) Assign Dotted</p> <table border="1"> <tr> <td>▷ Maria Weston</td> <td>Edit</td> </tr> <tr> <td>▷ Weston Payne</td> <td>Edit</td> </tr> </table>	▷ Maria Weston	Edit	▷ Weston Payne	Edit
▷ Maria Weston	Edit				
▷ Weston Payne	Edit				
<p>NOTE: In the Edit Screen, you can chose employees by Employee Org, Employee name, or both</p> <p>22. To pick employees by Org Number, click the magnifying glass next to Organization.</p>	 <p>Dotted Supervisor: Maria Weston</p> <p>Organization: [Search Icon]</p> <p>Employee(s): [Search Icon]</p> <p>Add</p>				
<p>23. Enter your org number and click go</p> <p>24. Check the select button next to the Org you needing and click the select button</p>	 <p>Organization</p> <p>Available Entries for Organization</p> <p>Search: 46010 Go</p>				

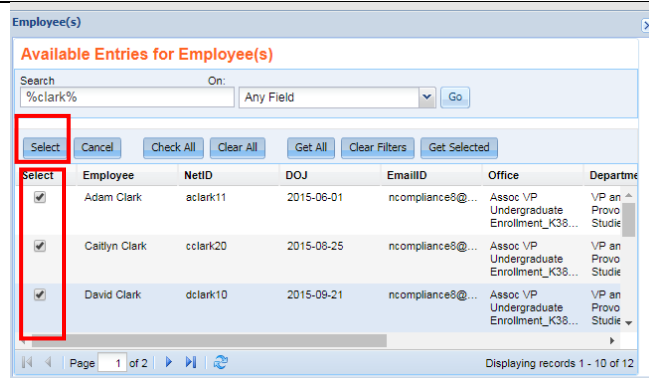
																													
<p>25. Click the magnifying glass next to Employee(s)</p>																													
<p>26. A list of employees from the org you chose previously are available in the Available Entries for Employee(s) box. From here, choose the employees you need to add. There are multiple ways to do this.</p>	 <table border="1"> <thead> <tr> <th>Select</th> <th>Employee</th> <th>NetID</th> <th>DOJ</th> <th>EmailID</th> <th>Office</th> <th>Department</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Aaron Benavides</td> <td>abenavi3</td> <td>2017-09-29</td> <td>ncompliance@...</td> <td>Assoc VP Undergraduate Enrollment_K38...</td> <td>VP an Provo Studie</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Aaron Donahue</td> <td>adonahu1</td> <td>2010-05-16</td> <td>ncompliance@...</td> <td>Assoc VP Undergraduate Enrollment_K38...</td> <td>VP an Provo Studie</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Aaron Harmaty</td> <td>aharmaty</td> <td>2017-06-01</td> <td>ncompliance@...</td> <td>Assoc VP Undergraduate Enrollment_K38...</td> <td>VP an Provo Studie</td> </tr> </tbody> </table>	Select	Employee	NetID	DOJ	EmailID	Office	Department	<input type="checkbox"/>	Aaron Benavides	abenavi3	2017-09-29	ncompliance@...	Assoc VP Undergraduate Enrollment_K38...	VP an Provo Studie	<input type="checkbox"/>	Aaron Donahue	adonahu1	2010-05-16	ncompliance@...	Assoc VP Undergraduate Enrollment_K38...	VP an Provo Studie	<input type="checkbox"/>	Aaron Harmaty	aharmaty	2017-06-01	ncompliance@...	Assoc VP Undergraduate Enrollment_K38...	VP an Provo Studie
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<p>27. To choose by scrolling down the list, put a check in the names you want to add and click select</p>	 <table border="1"> <thead> <tr> <th>Select</th> <th>Employee</th> <th>NetID</th> <th>DOJ</th> <th>EmailID</th> <th>Office</th> <th>Department</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Aaron Benavides</td> <td>abenavi3</td> <td>2017-09-29</td> <td>ncompliance@...</td> <td>Assoc VP Undergraduate Enrollment_K38...</td> <td>VP an Provo Studie</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Aaron Donahue</td> <td>adonahu1</td> <td>2010-05-16</td> <td>ncompliance@...</td> <td>Assoc VP Undergraduate Enrollment_K38...</td> <td>VP an Provo Studie</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Aaron Harmaty</td> <td>aharmaty</td> <td>2017-06-01</td> <td>ncompliance@...</td> <td>Assoc VP Undergraduate Enrollment_K38...</td> <td>VP an Provo Studie</td> </tr> </tbody> </table>	Select	Employee	NetID	DOJ	EmailID	Office	Department	<input checked="" type="checkbox"/>	Aaron Benavides	abenavi3	2017-09-29	ncompliance@...	Assoc VP Undergraduate Enrollment_K38...	VP an Provo Studie	<input checked="" type="checkbox"/>	Aaron Donahue	adonahu1	2010-05-16	ncompliance@...	Assoc VP Undergraduate Enrollment_K38...	VP an Provo Studie	<input checked="" type="checkbox"/>	Aaron Harmaty	aharmaty	2017-06-01	ncompliance@...	Assoc VP Undergraduate Enrollment_K38...	VP an Provo Studie
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28. To choose by searching names, use the search filter, search for %Clark% and click **Go**.



29. Put a check in the names you want to add and click **Select**

NOTE: You can choose all the names you need to add then click **Select**



30. You can add everyone in the Org
31. To do so, Click **Get All** (this adds everyone to a one page search)
32. Click **Check All** (this checks all the users in the list)
33. Click **Select** (this selects all checked users)

NOTE: Only 250 users can be added at a time. The system will give you a message letting you know that you have more than 250 users. If your search results is more than 250 users, only select 250. You than then perform another search and add 250 more. The system will not show the previously selected users

Employee(s)

Available Entries for Employee(s)

Search: On:

Select	Employee	NetID	DOJ	EmailID	Office	Department
<input checked="" type="checkbox"/>	Aaron Benavides	abenavi3	2017-09-29	ncompliance8@...	Assoc VP Undergraduate Enrollment_K38...	VP an Provo Studie
<input checked="" type="checkbox"/>	Aaron Donahue	adonahu1	2010-05-16	ncompliance8@...	Assoc VP Undergraduate Enrollment_K38...	VP an Provo Studie
<input checked="" type="checkbox"/>	Aaron Harmaty	aharmaty	2017-06-01	ncompliance8@...	Assoc VP Undergraduate Enrollment_K38...	VP an Provo Studie

Displaying records 1 - 10 of 10

34. To add the user in the **Employees to Supervisor** screen, click **Add**

NOTE: If you need to remove a dotted-line supervisor, check the box next to the user in the Employee to Supervisor pane and click remove.

Dotted Supervisor
Maria Weston

Organization
Financial Aid 46010 Work Gr

Employee(s)
Aaron Benavides, Aaron Donal

Note : On clicking the Add button, the selected employee(s) will be added to the Dotted Line Supervisor

Employee Details

Employees to Supervisor

Delete Row(s)	Name	NetID	DOJ	EmailID	Office	Department	Executive Le...	Unit
<input type="checkbox"/>	Dennis Park	dpark	1997-10-06	ncompliance8@...	VP and Chief I...	VP and Chief I...	Executive VP ...	VP and Chief I

Records per page: 20 Report Data as of: 02/02/2018 08:01 AM

35. Once users have been added, click **Close**.

Dotted Supervisor
Maria Weston

Organization

Employee(s)

Add

Note : On clicking the Add button, the selected employee(s) will be added to the Dotted Line Supervisor

Employee Details

Employees to Supervisor

Delete Row(s)	Name	NetID	DOJ	EmailID	Office	Department	Executive Le...	Unit
<input type="checkbox"/>	Aaron Benavi...	abenavi3	2017-09-29	ncompliance8...	Assoc VP Und...	VP and Assoc...	Provost_ND2...	Exec Dir of St.
<input type="checkbox"/>	Aaron Donahue	adonahu1	2010-05-16	ncompliance8...	Assoc VP Und...	VP and Assoc...	Provost_ND2...	Exec Dir of St.
<input type="checkbox"/>	Aaron Harmaty	aharmaty	2017-06-01	ncompliance8...	Assoc VP Und...	VP and Assoc...	Provost_ND2...	Exec Dir of St.
<input type="checkbox"/>	Aaron Long	along10	2017-09-04	ncompliance8...	Assoc VP Und...	VP and Assoc...	Provost_ND2...	Exec Dir of St.
<input type="checkbox"/>	Aaron Rea	area	2016-01-11	ncompliance8...	Assoc VP Und...	VP and Assoc...	Provost_ND2...	Exec Dir of St.
<input type="checkbox"/>	Aaron Roe	aroe	2017-09-11	ncompliance8...	Assoc VP Und...	VP and Assoc...	Provost_ND2...	Exec Dir of St.
<input type="checkbox"/>	Aaron Roeder	aroeder1	2017-08-22	ncompliance8...	Assoc VP Und...	VP and Assoc...	Provost_ND2...	Exec Dir of St.
<input type="checkbox"/>	Aaron Rosenb...	arosenb4	2017-08-22	ncompliance8...	Assoc VP Und...	VP and Assoc...	Provost_ND2...	Exec Dir of St.
<input type="checkbox"/>	Aaron Tyrrell	atyrrell	2016-08-10	ncompliance8...	Assoc VP Und...	VP and Assoc...	Provost_ND2...	Exec Dir of St.

Records per page: 20 Report Data as of: 02/02/2018 08:36 AM Display

Remove Close

NOTE: For more information see comply.nd.edu