

# Department Managers



## Introducing Themis for Department Managers

Themis is an integrated information management system used by all staff at the University to perform essential administrative tasks.

This document provides information for University Managers (e.g.: Faculty General Managers, Divisional Directors, Managers of Academic and Administrative Departments and Schools) who need to access detailed position and/or assignment information for all the staff within their organisational unit.

### Responsibilities

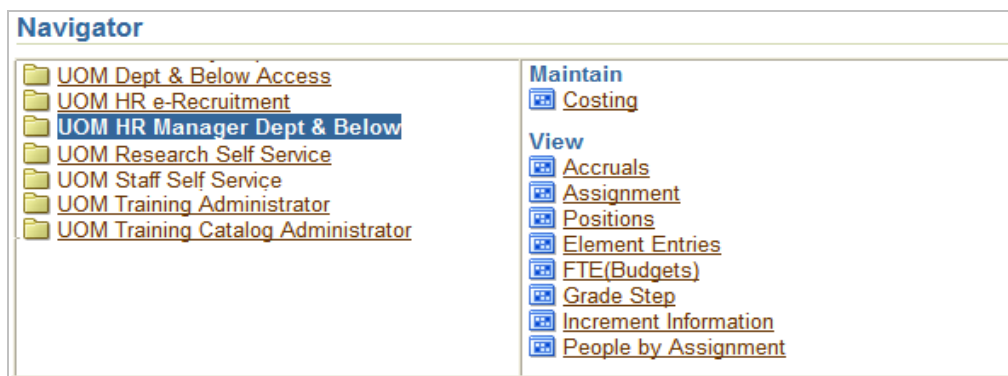
There are two Themis responsibilities that enable managers to access required information (**note:** the menu options available are identical for both responsibilities – the responsibilities differ in the breadth of access they provide to staff records):

- **UOM HR Manager Department** – provides access to detailed and confidential information about all staff in the organisational unit (e.g.: Department of Zoology).
- **UOM HR Manager Department and Below** – provides access to detailed and confidential information about all staff in the organisational unit, as well as access to information about staff in all the subordinate organisation units (e.g.: Faculty of Science and all the departments under that faculty).

### Available Functions

The functions within **UOM HR Manager Dept (& Below)** are divided into two main headings: Maintain and View.

- Maintain menu allows you to update information
- View menu allows you to only view records/details



### Find Person screen

Most menu items (excluding **View > People by Assignment** and **View > Position**) involve performing a query on an individual staff member. When submitting an individual query, the Find Person screen will display.

You may search by name using the Full Name field (**Hint:** use the % wildcard to refine your search) or by staff number using the Number field (located in the *Search by number* segment of the screen). Once you have entered your search criteria, click on the **Find** button to perform the search.

**Note:** if the search does not retrieve the staff member, check your effective date (refer to page 7). If you have date tracked to before the staff member joined your department, the record will not be found.

## Maintain menu

### Costing

View and update costings for individual employees. Information displayed is attributed to the account codes by percentage. **Note:** percentage splits must add up to 100%.



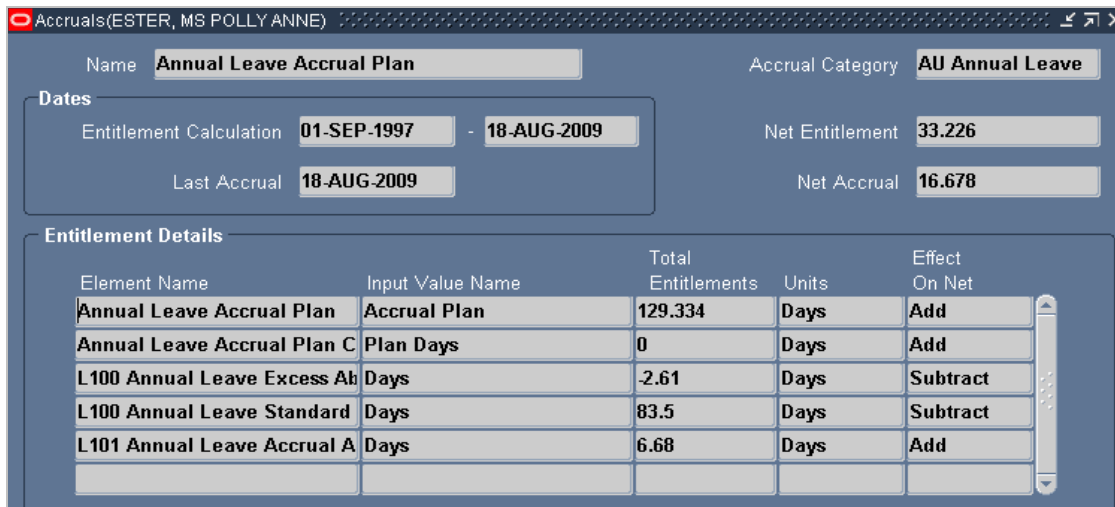
Any changes to costing (either code or proportion) will take effect from the start of the current payroll period (e.g.: if you make a change on a Monday and the next pay is due on the Friday, the change will be processed on Friday and backdated for the whole pay period).

## View menu

### Accruals

View annual leave, sick leave and long service leave entitlements for a selected staff member.

**Note:** the entitlement/accrual figures displayed in the Accrual screen do not include leave applications pending approval. The Accrual screen does not display committed leave - use the **Absence Calendar** function in Supervisor Self Service to view a staff member's leave commitment.



The Accrual screen will default to *annual leave* entitlements. To view other leave entitlements place your cursor in the Name field and use the keyboard arrow keys to scroll through other entitlement views.

#### Net Entitlement/Accrual figures

Two figures are displayed on this screen: Net Entitlement and Net Accrual.

- Net Entitlement displays a figure based prior to the staff member's last anniversary date. For long service leave it displays the figure inclusive of continuous service.
- Net Accrual displays a figure since the staff member's last anniversary date.

To obtain an accurate entitlement figure for Sick Leave or Annual Leave as at the nominated effective date, add the Net Entitlement and the Net Accrual figures together.

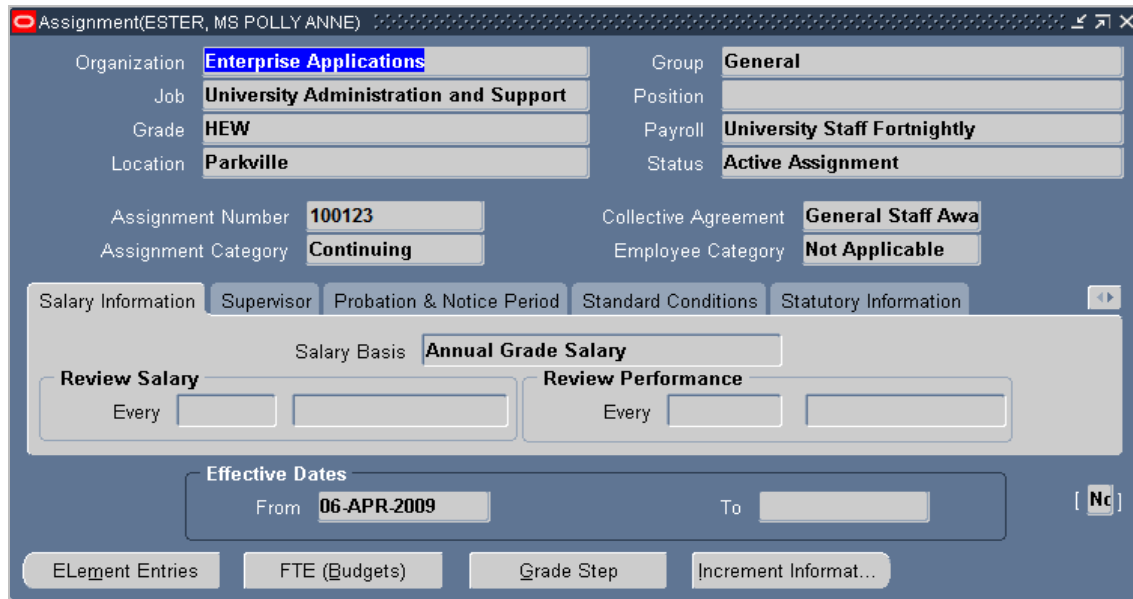
To calculate the entitlement figure for Long Service Leave, if the Net Entitlement is 0, then no entitlement is due. If the Net Entitlement is *greater than 0*, add this figure to the Net Accrual figure for the total entitlement.

#### Entitlement Details

The *Entitlement Details* segment displays a detailed summary of all the entitlement elements for the specified period.

## Assignment

View a range of individual appointment details, including: job type and position number, grade, assignment number; supervisor; and probation information.



Assignment(ESTER, MS POLLY ANNE)

Organization: Enterprise Applications | Job: University Administration and Support | Grade: HEW | Location: Parkville | Group: General | Position: | Payroll: University Staff Fortnightly | Status: Active Assignment

Assignment Number: 100123 | Collective Agreement: General Staff Awa | Assignment Category: Continuing | Employee Category: Not Applicable

Salary Information | Supervisor | Probation & Notice Period | Standard Conditions | Statutory Information

Salary Basis: Annual Grade Salary

Review Salary: Every [ ] | Review Performance: Every [ ]

Effective Dates: From 06-APR-2009 | To [ ] [ Nc ]

Element Entries | FTE (Budgets) | Grade Step | Increment Informat...

**Position summary:** the top segment of the screen provides a summary of the staff member's position (including job, grade and payroll type).

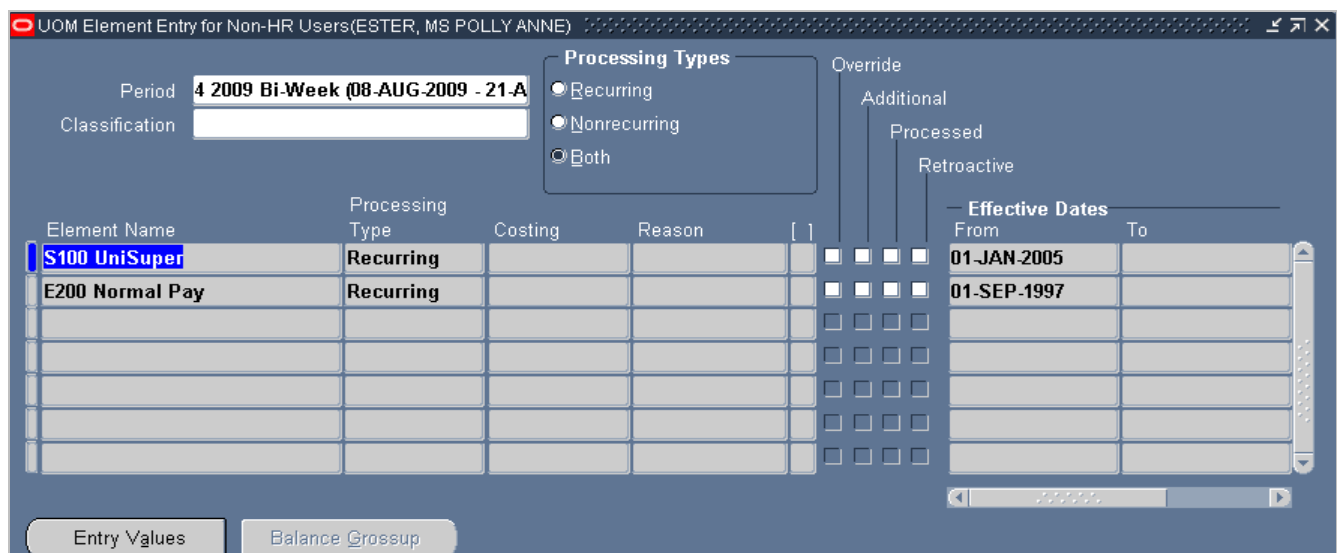
**Tabs:** the tabs section provides details of the staff member's salary type (standard/executive), supervisor, probation period (if applicable); and the legal employer (e.g.: University of Melbourne, Melbourne University Press, etc).

**Effective dates:** displays the dates for which the assignment details are valid. **Note:** if the To field is blank, the record is current and ongoing. You may use the **Date Track History** icon (📅) in the tool bar to view a summary of the position/assignment changes to the staff member's record.

**Menu access buttons:** you may use the buttons at the bottom of the screen to access other menu items for the selected staff member (without returning to the Navigator screen). Refer to the appropriate section below for the information available in each of these menu items.

## Element Entry

View both recurring and non-recurring payroll entries for the staff member in the selected pay period (including: normal pay; superannuation; etc). **Note:** this list is restricted (i.e.: personal details such as tax file number, child care or sports centre commitments will not display).



UOM Element Entry for Non-HR Users(ESTER, MS POLLY ANNE)

Period: 4 2009 Bi-Week (08-AUG-2009 - 21-A) | Classification: [ ]

Processing Types:  Recurring |  Nonrecurring |  Both

Override: Additional | Processed | Retroactive

Element Name	Processing Type	Costing	Reason	Effective Dates From	Effective Dates To
S100 UniSuper	Recurring			01-JAN-2005	
E200 Normal Pay	Recurring			01-SEP-1997	

Entry Values | Balance Grossup

Click on the **Entry Values** button to view further details for a selected element entry.

## FTE (Budgets)

View the time fraction for the staff member's assignment. A full-time assignment will display as 1 in the Value field, a part-time assignment will display as a decimal (e.g.: .5, .8, etc).

Value	Unit	Effective Dates	
		From	To
1	Full Time Equivalent	01-JAN-2005	

**Note:** it is not possible to determine if a staff member who has multiple assignments is full- or part-time from this screen.

## Grade Step

View the increment details for the selected staff member's assignment.

**Grade Scale**  
Grade: HEW 5  
Ladder: [ ]  
Pay Scale: University General Pay Scale  
Ceiling: HEW 5  
Point: HEW 5  
Step: 5

**Grade Step Placement**  
Point: HEW5.5  
Reason: New Appointment  
Step: 5  
Further Information: [ ]  
 Auto-Increment  
Increment Number: [ ]

**Effective Dates**  
From: 01-JAN-2007  
To: [ ]

**Progression Point Values**

Rate	Value	Units	Effective Dates	
			From	To
University General Scale	12345.00	Money	04-APR-2009	

**Grade Scale:** the top segment of the screen displays the grade, ceiling point and step for the assignment.

**Grade Step Placement:** displays the staff member's grade details (including: current point and step/level, effective dates, payment rates, etc). **Note:** you should always check the effective date range to ensure you are viewing the appropriate information.

## Increment information

View the increment due date for the staff member, and whether they have reached the increment ceiling.

Type: Increment Information

Details:

08-AUG-2009	Yes
08-AUG-2005 08-AUG-2005	No
08-AUG-2006 11-AUG-2006	No
08-AUG-2008 16-OCT-2008	Yes

Click on the appropriate row in the *Details* segment to display the Extra Assignment Information screen. This screen displays the increment date, PDF review date and whether the increment ceiling has been reached.

## People by Assignment

View assignment details of staff members within your department/faculty, including: supervisor, assignment and position, grade, job type, payroll type, and whether this is their primary position. **Note:** results are fully exportable to Excel (refer to page 7).

Employee #	Full Name	Supervisor	Assignment #	Position
001234	ADAMS, MS MORTICIA	CATTLE, MR BRANDON Z	001234	0020194~SERVICE DELIVER
001258	AVERAGE, LORD JOE	ESTER, MS POLLY ANNE	001258	0015557~SENIOR BUSINES
002587	CATTLE, MR BRANDON Z	FROMAGE, PROF LARJ	002587	0003620~MANAGER, WEB S
009876	ESTER, MS POLLY ANNE	CATTLE, MR BRANDON Z	009876	0019792~DOCUMENT AND
003698	LASTIC, MS LUCY	ESTER, MS POLLY ANNE	003698	0004582~SERVICE DELIVER

There are two ways to use this screen.

### Option 1

- 1 Select a parameter or combination of parameters in the top segment of the screen, including:

Field	Action
Organization	Select your department name from the list of values (LOV).
Group	Select the employee group from the LOV (e.g.: general staff, academic, casual/honorary).
Grade	Select the employee grade from the LOV (e.g.: HEW 6, Level A, etc).
Payroll	Select the payroll type from the LOV (i.e.: casual or fortnightly).
Job	Select the job type from the LOV (e.g.: Academic Teaching and Research, University Administration, etc).
Position	Specify the position number/title.

### Option 2

- 1 Specify your department in the Organisation field.  
Users with **HR Manager Dept and Below** responsibility can search by a specific department or leave this field blank to search by all units within their faculty/organisation.
- 2 Place your cursor in the table segment of the screen and press **F11** to put the screen into query mode.
- 3 Type your parameter or combination of parameters in the appropriate fields.  
e.g.: supervisor name, position title, etc. **Note:** fields are case sensitive when performing a query, use the % wildcard to expand your search criteria.
- 4 Press **Ctrl + F11** to run the query.

## Positions

View the details of a position (or group of positions) within your department/faculty, including: name; status; time fraction of position; grade; reporting hierarchy; and HR/Research delegation.

The screenshot shows a window titled "Position" with the following details:

- Name:** 0016202~DOCUMENTATION OFFICER, DOC' AND TRAINING SERVICES~Officer
- Status:**  Open,  Under Review,  Approved Future Actions
- Position Details:** Start Date: 10-DEC-2006
- Date Effective Name:** 0016202~DOCUMENTATION OFFICER, DOC' AND TRAINING SER'
- Type:** Single Incumbent,  Permanent,  Seasonal
- Organization & Job:** Organization: Enterprise Applications, Job: University Administration and Support
- Hiring Status:** Status: Active, Start Date: 10-DEC-2006
- Location:** Parkville
- Effective Dates:** From: 10-DEC-2006

Buttons at the bottom: Reporting To, Occupancy, Extra Information

The **View > Position** menu item involves performing a query on a position or group of positions. When submitting a position query, the Find Positions screen will display.

The screenshot shows a window titled "Find Positions" with the following search criteria:

- Name:** [Empty field]
- Type:** [Empty field]
- Hiring Status:** [Empty field]
- Job:** [Empty field]
- Organization:** [Empty field]
- Location:** [Empty field]

Buttons at the bottom: Clear, New, Find

You may search on a single parameter or combination of parameters, including:

Field	Action
Name	Click on the LOV to display the Position Name screen. Use this screen to specify the Position Number, Position Title, or Standard Position Title for which you wish to search.
Type	Select the position type from LOV (e.g.: shared position, single incumbent, etc).
Job	Select the type of job from the LOV (e.g.: Academic Research, Honorary, University Support, etc).
Organisation	Select the department from the LOV. <b>Note:</b> users with <b>HR Manager Dept and Below</b> responsibility can use this field to retrieve all positions within a specific department.

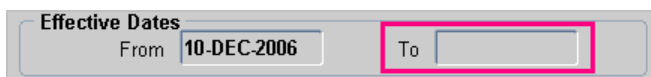
## Date Tracking

Date Tracking is an important navigation tool in Themis HR. An employee record in Themis HR is considered to be continuous from the date it is entered into the system. Any changes to the employee record needs to be considered as being changed *From an Effective Date*. Changing a record from an effective date ends the previous record the day before the new change takes effect.

Within the **HR Department Manager** responsibilities date tracking (viewing from an effective date) allows you to project into the future (e.g.: to look at leave entitlements), view retrospective information (e.g.: check what increment level a staff member was on two years ago) as well as checking current information.

**Important note:** always be aware of the effective date you are viewing. When you set an effective date it remains valid across all records and screens during your current log in session until you change or reset it.

Several of the screens display an *Effective Date* region. If the To field is blank, you are viewing the current ongoing record. If there is a date in the To field then there is a future dated action occurring the day after the date listed.




### Changing the Effective Date

The effective date function in Themis allows you to project forward or backwards when accessing staff details.


Some menu items will advise you of your current effective date and ask whether you want to alter it. To accept the current effective date, click the **Yes** button.

**To specify an alternate effective date:**

- 1 Click the **No** button.
- 2 Enter the date you wish to change to and click the **OK** button.
- 3 To change the date back to "today", click on the **Reset** button.

**Note:** if you have changed the effective date (i.e.: date is not "today") it will usually display in the black title bar of the screen. 

**To change the effective date from within a screen:**

- 1 Click on the **Effective Date** icon () on the toolbar.
- 2 Enter the date you wish to change to and click the **OK** button.
- 3 To change the date back to "today", click on the **Reset** button.

## Exporting data to Excel

Large queries in the People by Assignments screen can be exported to Excel for printing and manipulation.

Employee #	Full Name	Supervisor	Assignment #	Position
001234	ADAMS, MS MORTICIA	CATTLE, MR BRANDON Z	075906	0020194~SERVICE DELIVER
001258	AVERAGE, LORD JOE	ESTER, MS POLLY ANNE	063107	0015557~SENIOR BUSINES
002587	CATTLE, MR BRANDON Z	FROMAGE, PROF LARJ	377856	0003620~MANAGER, WEB S
009876	ESTER, MS POLLY ANNE	CATTLE, MR BRANDON Z	078333	0019792~DOCUMENT AND

**To export data to Excel:**

- 1 Select **File > Export** from the menu bar.  
**Note:** do not use the **Export Data** icon on the tool bar as it is linked to a function not used in this responsibility.
- 2 Choose to save the file to your completer or open the file directly.
- 3 If you are saving the file, select a location and name the file, then click on the **Save** button.  
The Download Completed screen will display.
- 4 Click on the **Open** button to view the information in an Excel spreadsheet.

The document will usually open as a text tab delimited file (.tsv file). To covert this to an Excel document, select **File > Save As** from the menu bar and save the document as an *Excel workbook*.

## Getting help

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The Themis website ([www.themis.unimelb.edu.au](http://www.themis.unimelb.edu.au)) provides written support in a variety of formats:

- Reference cards (step-by-step instructions for specific tasks)  
[http://www.themis.unimelb.edu.au/support/ref\\_cards.html](http://www.themis.unimelb.edu.au/support/ref_cards.html)
- Information sheets (overview of specific module, function or responsibility)  
[http://www.themis.unimelb.edu.au/support/documentation/info\\_sheets.html](http://www.themis.unimelb.edu.au/support/documentation/info_sheets.html)
- Frequently Asked Questions <http://www.themis.unimelb.edu.au/support/faq.html>

### Recommended Resources

- Themis Foundation - Introduction to Oracle (forms) user guide  
[http://www.themis.unimelb.edu.au/support/documentation/user\\_guides.html](http://www.themis.unimelb.edu.au/support/documentation/user_guides.html)
- Introduction to Discoverer Viewer user guide  
[http://www.themis.unimelb.edu.au/support/documentation/user\\_guides.html](http://www.themis.unimelb.edu.au/support/documentation/user_guides.html)
- Viewing employment details of staff in your hierarchy reference card  
[http://www.themis.unimelb.edu.au/resources/RC\\_View\\_Employee\\_Details.pdf](http://www.themis.unimelb.edu.au/resources/RC_View_Employee_Details.pdf)
- Introduction to Themis HR Supervisor information sheet  
[http://www.themis.unimelb.edu.au/support/documentation/info\\_sheets.html](http://www.themis.unimelb.edu.au/support/documentation/info_sheets.html)

### Themis Service Desk

The Themis Service Desk team provides technical assistance from 9am to 5pm, Monday to Friday. You may lodge Themis queries:

- Online: <http://servicedesk.unimelb.edu.au/itsc/themis>
- By email: [ea-help@unimelb.edu.au](mailto:ea-help@unimelb.edu.au)
- By phone: 8344 9500