

ESHARP Training Guide-Supervisor

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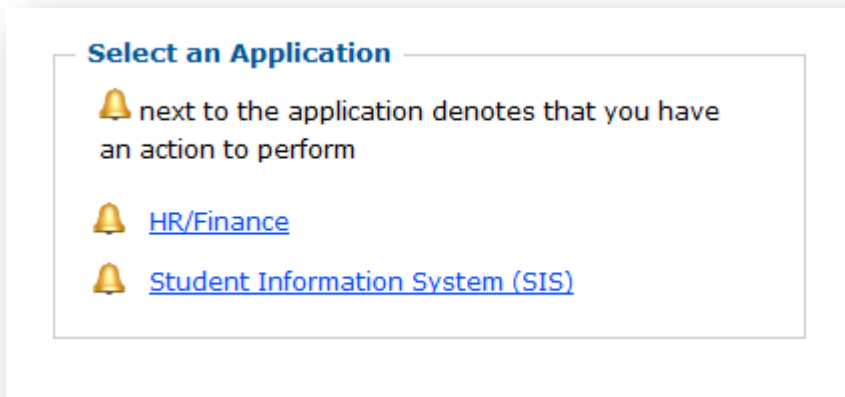
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Select an Application

1. Select an application to request responsibilities in ESHARP.
 - Bell next to application indicates action item waiting for you in that application.



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Home Screen

2. Once you log into ESHARP the Home Screen Displays.
 - Gray box on right shows profile data known by ESHARP. If information is not correct, do not create requests until it is corrected in the Integrated System HR/Finance (HR/Fin) and appears correctly in the ESHARP gray box. Contact your Supervisor to update your information.
 - Electronic Access Agreement (EAA): “EAA signature needed” warning – you can sign the agreement electronically by clicking on the EAA link in the warning or clicking on the Electronic Access Agreement link at the bottom of the Home page.
 - “Employee Action Needed” reminder displays under the Action link for required Employee Responsibility Request Acceptance.
 - You can switch applications while in ESHARP using the link in top right corner. If creating a request, the request will be saved but not submitted if you change applications mid-request.
 - FAQ link is in top right corner.




Welcome: Jennifer Charback
[FAQ](#) [Switch Applications](#) [Home](#) [Logout](#)

 [Request Access](#)
 Submit a New Request and or submit saved request.

 [Actions \(8\)](#)
 View responsibility requests that require you to take action.

EMPLOYEES: You will receive an "Action needed" email for each request that moves through the approval process for you. After the email is sent the Actions icon above will display the number of requests, in parentheses, that need your review/approval. You MUST click on the **Actions** icon, then for each request, click on the **Approve** icon and complete the Employee Acknowledgment action before the responsibility can be granted.

 [View Pending and Historical Requests for Access](#)
 View the work flow process of a submitted responsibility.

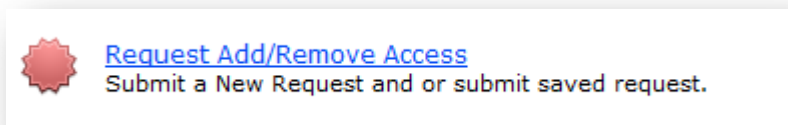
 [Supervisor Designee](#)
 Designate a person to take action on an access request while you are out of the office. The Designee will be able to approve or deny an access request.


Name: Jennifer Charback (jlc3wn)
 EAA: 4/18/2013
 Ferpa: 4/18/2013
 Organization: 20030 HR-Human Resources
 Supervisor: Patricia Marbury (pam5w)

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Request Add/Remove Access for an Employee

3. Click on Request Add/Remove Access



 [Request Add/Remove Access](#)
 Submit a New Request and or submit saved request.

4. Click on New Request

- Requests That Have Not Been Submitted box always appears. It is empty if there are no saved or unsubmitted requests.
- Plus sign (+) on right displays information about saved request.
- Pencil icon in Actions column goes to Summary page for submission.
- Red X icon in Actions column deletes the saved request.



[New Request](#)

Click on New Request to start a new request for access.

Requests That Have Not Been Submitted

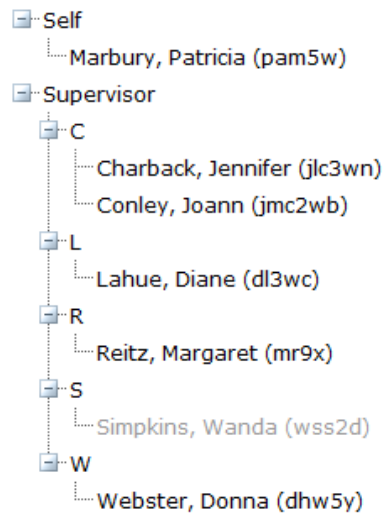
	Application Name	Employee Full Name	Employee Type	Actions
	HR/Finance	Jennifer Charback (jlc3wn)		
	HR/Finance	Jennifer Charback (jlc3wn)		

5. Select Employee

- Names listed alphabetically by Last Name; click on first letter of Last Name.
- If name grayed out, then the employee has not signed Electronic Access Agreement and/ FERPA. Notify employee to sign into ESHARP to sign the forms electronically.

[Home](#) > [Request](#) > Employee

Employees who are greyed out have not signed their Electronic Access Agreement or FERPA Agreement or both.



6. Select the Supervisor and Organization.

- Note: if employee has multiple assignments and supervisors they default to value on far left.
- If employee only has one assignment and supervisor, then this information defaults.

7. Click the **Continue** button.

Request Information

Employee Name Jennifer Charback (jlc3wn)

Supervisor Patricia Marbury (pam5w)

Organization 20030 HR-Human Resources

Request comment
(This Comment
pertains to all of
the responsibilities
included in the
request. It is
optional.)

8. In the Select a Responsibility section use the + signs and expand the module (e.g., Accounts Payable, Student Records) and click on the responsibility (e.g., UVA AP Administrator, UV SR User Schools). You may add additional responsibilities at the end of the process.

- Information about responsibilities is now listed in the blue box on the right: Links to Responsibility Descriptions/Training. These links open a new web page for appropriate Toolkit. You can close the web page to return to ESHARP.

Instructions

Select a Responsibility: Using the + signs below, expand the module (e.g., Accounts Payable, Student Records) and click on the responsibility (e.g., UVA AP Administrator, UV SR User Schools). You may add additional responsibilities at the end of the process.

To view responsibility descriptions and training requirements/recommendations, use the drop-down arrows for the appropriate module in the table to the right, click a responsibility name to access its toolkit in a separate browser window, view descriptions, and enroll in training.

Select a Responsibility

- [-] Production
 - [-] Accounts Payable (AP)
 - [-] Accounts Receivable (AR)
 - [-] Budget (BU)
 - [-] Cash Management (CM)
 - [-] Fixed Assets (FA)
 - [-] General (GEN)
 - [-] General Ledger (GL)
 - [-] Grants Accounting (GA)
 - [-] Human Resources (HR)
 - [-] Labor Distribution (LD)
 - [-] Oracle Learning Management (OLM)
 - [-] Payroll (PAY)
 - [-] Purchasing (PO)
 - [-] Self Service Web Applications

Links to Responsibility Descriptions/Training


- Accounts Payable (AP) ▾
- Accounts Receivable (AR) ▾
- Budget (BU) ▲
 - UVA Budget Developer
 - UVA UBO Budget Developer
- Cash Management (CM) ▾
- Fixed Assets (FA) ▾
- General (GEN) ▾
- General Ledger (GL) ▾
- Grants Accounting (GA) ▾
- Human Resources (HR) ▾
- Labor Distribution (LD) ▾
- Oracle Learning Management (OLM) ▾
- Payroll (PAY) ▾
- Purchasing (PO) ▾
- Self Service Web Applications

9. Enter required Data for the Responsibility and click **Continue**.


- Error messages are at the top in red; field with error is marked with red asterisk on left side.
- Required Data
 - Dropdown value list is available, rather than entering information, where applicable.
 - Can pick multiple values from dropdown value list, where applicable.
 - Required information is provided in text boxes to the right of the question rather than in a Responsibility Comment box. If noted as required, you must enter a value, though values are not edited or validated.

Responsibility Details

Description UVA PO Purchaser

Effective Date 10/2/2013 


Action Add Remove

Requisition Limit 

Approver First and Last Name

Approver Position Number

Employee Position Number

Comment (Optional) 

10. Add/Remove Additional Responsibilities.

- To add Additional Responsibilities click on:  and follow steps 7-8.

11. Review Summary Page

- Icons in Action Column
 - Pencil icon– Edit
 - Red X icon– Delete
- Icons in Submit Options
 - Save Request for Later Submission
 - Submit Request for Review (green light)
 - Delete Request (red x)

Request Information

Application: Student Information System (SIS) Supervisor: Patricia Marbury (pam5w)

Employee: Jennifer Charback (jlc3wn) Org: 20030 HR-Human Resources

Submitted By: Jennifer Charback (jlc3wn)

[Edit Request](#)

Submit Options



Save Request
for Later
Submission



Submit
Request For
Review



Delete
Request

Requested Responsibilities

Add Additional Responsibility					
Effective Date	Instance	Module	Description	Action	Actions
08/30/2013	Production	Financial Aid (FA)	UV FA Work Study Reporting UGRD College of Arts & Sciences	Add	
10/02/2013	Production	Admissions (AD)	UV AD Alumni Assoc Reporting	Add	

12. Submit Request For Review.

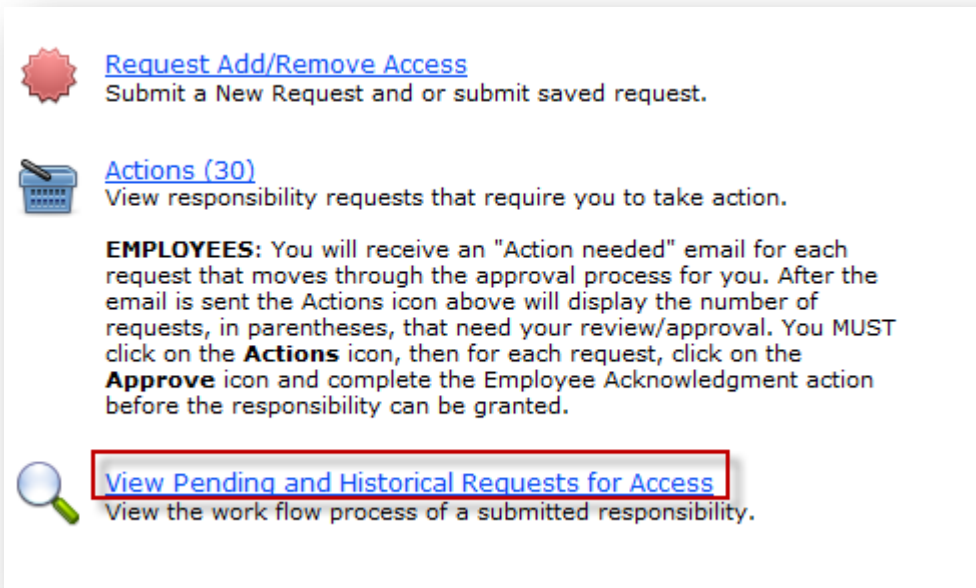
Submit Options


Save Request
for Later
Submission


Submit
Request For
Review

Delete Request


View Pending and Historical Requests for Access



 [Request Add/Remove Access](#)
Submit a New Request and or submit saved request.

 [Actions \(30\)](#)
View responsibility requests that require you to take action.

EMPLOYEES: You will receive an "Action needed" email for each request that moves through the approval process for you. After the email is sent the Actions icon above will display the number of requests, in parentheses, that need your review/approval. You **MUST** click on the **Actions** icon, then for each request, click on the **Approve** icon and complete the Employee Acknowledgment action before the responsibility can be granted.

 [View Pending and Historical Requests for Access](#)
View the work flow process of a submitted responsibility.

1. **Click View Requests for Access – Current** to view all requests that are active in the approval workflow.

Or

Click View Requests for Access – Historical to view all requests that are **Completed** or **Denied**.

- Most common selection criteria choices provided.
- Click “Show Advanced Search Options” to use more criteria to narrow search.

Home > Search > Current Responsibilities

Search Options [Show Advanced Search Options](#)

WorkflowRole: Employee (dropdown)
Employee (Computing Id or Last Name): [text input]
Responsibility: [dropdown]

Current Action Items Only

Effective Date	Submitted Date	Instance	Module	Responsibility	Action	Status	Employee	Roles	Comment
No records to display.									

1 | Displaying items 0 - 0 of 0

2. Click on **plus** sign on left of responsibility request to see additional Approval Data values, if applicable.
3. Click on **Status** to view the progress of the request.

Search Options [Show Advanced Search Options](#)

WorkflowRole: Employee (dropdown) Employee (Computing Id or Last Name): [input] Responsibility: [input]





Current Action Items Only [Submit] [Clear]





Effective Date	Submitted Date	Instance	Module	Responsibility	Action	Status	Employee	Roles	Comment	
08/21/2012	09/17/2013	Production	Student Records (SR)	UV_IN_SR_LINKING	Add	Submitted	[redacted]	Training	View	Status
11/08/2012	11/08/2012	Production	Financial Aid (FA)	UV FA User Dept GRAD Graduate School of Arts and Sciences	Add	Submitted	[redacted]	Training	View	Status
11/09/2012	11/09/2012	Production	Student Records (SR)	UV SR User Enrollment	Add	Submitted	[redacted]	Training	View	Status








Approval Data

Form Text	Approval Data Value
What actions will you be performing with this SIS responsibility?	Student Milestones

4. View the Status of the Request.

- Approved , Denied , Current  (indicates this is the workflow level currently under review), Pending  (indicates workflow levels yet to be reviewed).

Status Key: Approved  Denied  Current  Pending 

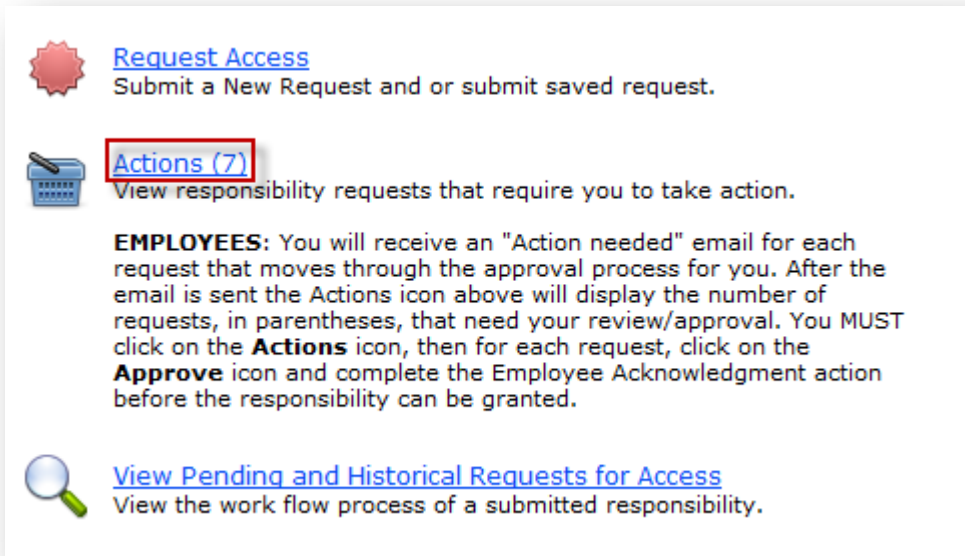
Level	Action Full Name	Workflow Role	Backup Notified	Submit By Admin	Action Date	Workflow Role Comment	Status
1		Supervisor			09/23/2013	View	
2		Data Access Approver			09/24/2013	View	
3		Deputy Data Steward Student Records			09/24/2013	View	
4		Training				View	
5		Employee Acknowledge - Accept				View	
6		Data Security Administrator				View	
7		Student Records Row Level				View	

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Actions: Workflow Level Approval

You will receive an email from esharp@virginia.edu telling you to **Approve/Deny** a request in ESHARP.

1. Click on the Actions link.











Request Access
Submit a New Request and or submit saved request.

Actions (7)
View responsibility requests that require you to take action.

EMPLOYEES: You will receive an "Action needed" email for each request that moves through the approval process for you. After the email is sent the Actions icon above will display the number of requests, in parentheses, that need your review/approval. You **MUST** click on the **Actions** icon, then for each request, click on the **Approve** icon and complete the Employee Acknowledgment action before the responsibility can be granted.

View Pending and Historical Requests for Access
View the work flow process of a submitted responsibility.

2. Approve or Deny the responsibilities in your Actions basket.
 - To approve (accept) - Click on Stamp icon in Actions column; brings up separate page to enter optional comment and Approve.
 - To deny (decline) –Click on Stop sign with hand in Actions column; brings up separate page to enter mandatory comment and Deny.

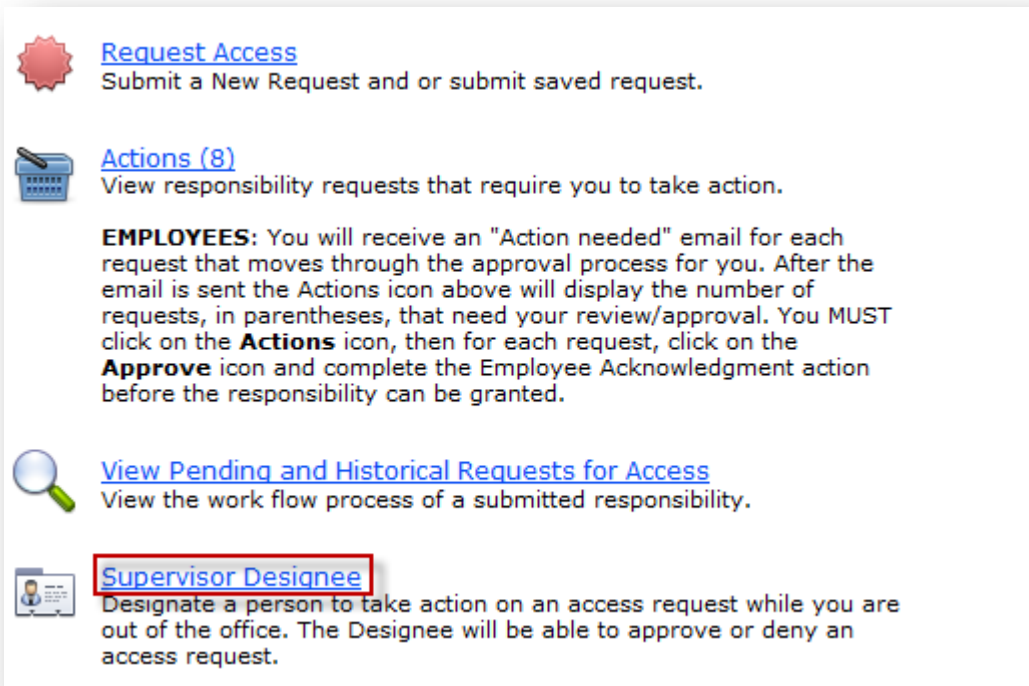
Instance	Module	Responsibility	Action	Employee	Effective Date	Submitted Date	Role	Email	Actions
Production	Student Records (SR)	UV SR User Enrollment	Add	Michael Watson (maw4fp)	11/09/2012	11/09/2012	Training	FYI	Details  
Production	Student Finance (SF)	UV SF Departmental Reporting GRAD Graduate School of Arts & Sciences	Add	Margaret Vanekeren (mnb3q)	02/06/2013	02/06/2013	Training	FYI	Details  
Production	Student Records (SR)	UV SR Acad User Reporting	Add	Adam Brooks (ajb8t)	09/06/2013	09/06/2013	Training	FYI	Details  
Production	Student Records (SR)	UV SR Acad User Reporting	Add	Kristina Bethea (kkb3c)	09/06/2013	09/06/2013	Training	FYI	Details  

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Supervisor Designee

As a Supervisor you can assign a Designee if you will be out of the office or as a backup. The request will go to the Supervisor first then after 3 days the request will go to the designee to approve or deny.

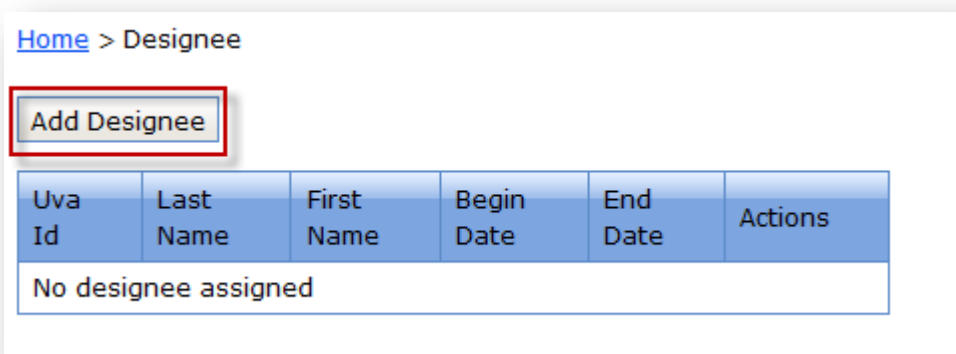
1. Select Supervisor Designee from the Home page.



The screenshot shows a dashboard with four main sections:

- Request Access**: Submit a New Request and or submit saved request.
- Actions (8)**: View responsibility requests that require you to take action. Below this is a detailed instruction for employees: **EMPLOYEES:** You will receive an "Action needed" email for each request that moves through the approval process for you. After the email is sent the Actions icon above will display the number of requests, in parentheses, that need your review/approval. You **MUST** click on the **Actions** icon, then for each request, click on the **Approve** icon and complete the Employee Acknowledgment action before the responsibility can be granted.
- View Pending and Historical Requests for Access**: View the work flow process of a submitted responsibility.
- Supervisor Designee**: Designate a person to take action on an access request while you are out of the office. The Designee will be able to approve or deny an access request. This section is highlighted with a red box in the original image.

2. Click Add Designee.



The screenshot shows the 'Home > Designee' page. At the top, there is a breadcrumb trail 'Home > Designee'. Below it is a button labeled 'Add Designee', which is highlighted with a red box. Underneath the button is a table with the following structure:

Uva Id	Last Name	First Name	Begin Date	End Date	Actions
No designee assigned					

3. Search for your designee, it must be a user must be another Supervisor. Click **Find**.

Find

Search for a Designee by Computing Id or Last Name (The search only returns supervisors)

Garey

Last Name	First Name	Computing Id	Actions
No records to display.			

4. Click Add to select the designee. **Note:** The Designee does not get notified that they have been set up as a designee.

Find

Search for a Designee by Computing Id or Last Name (The search only returns supervisors)


Last Name	First Name	Computing Id	Actions
Garey	Bryan	beg5c	Add


5. Select a Begin and End Date for the time frame the designee will be covering for you.

6. Click the **Submit** button.

[Home](#) > [Designee](#) > [Find Designee](#) > Add Designee

Add Designee - Bryan Garey

Begin Date 

End Date 

7. If you need to remove or change the Designee, click Edit to update or Delete to remove.

[Home](#) > Designee

Uva Id	Last Name	First Name	Begin Date	End Date	Actions
beg5c	Garey	Bryan	10/04/2013	10/05/2013	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

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