

How to . . .

Change an Employee's supervisor

Purpose You may need to change the supervisor of an employee at some point.

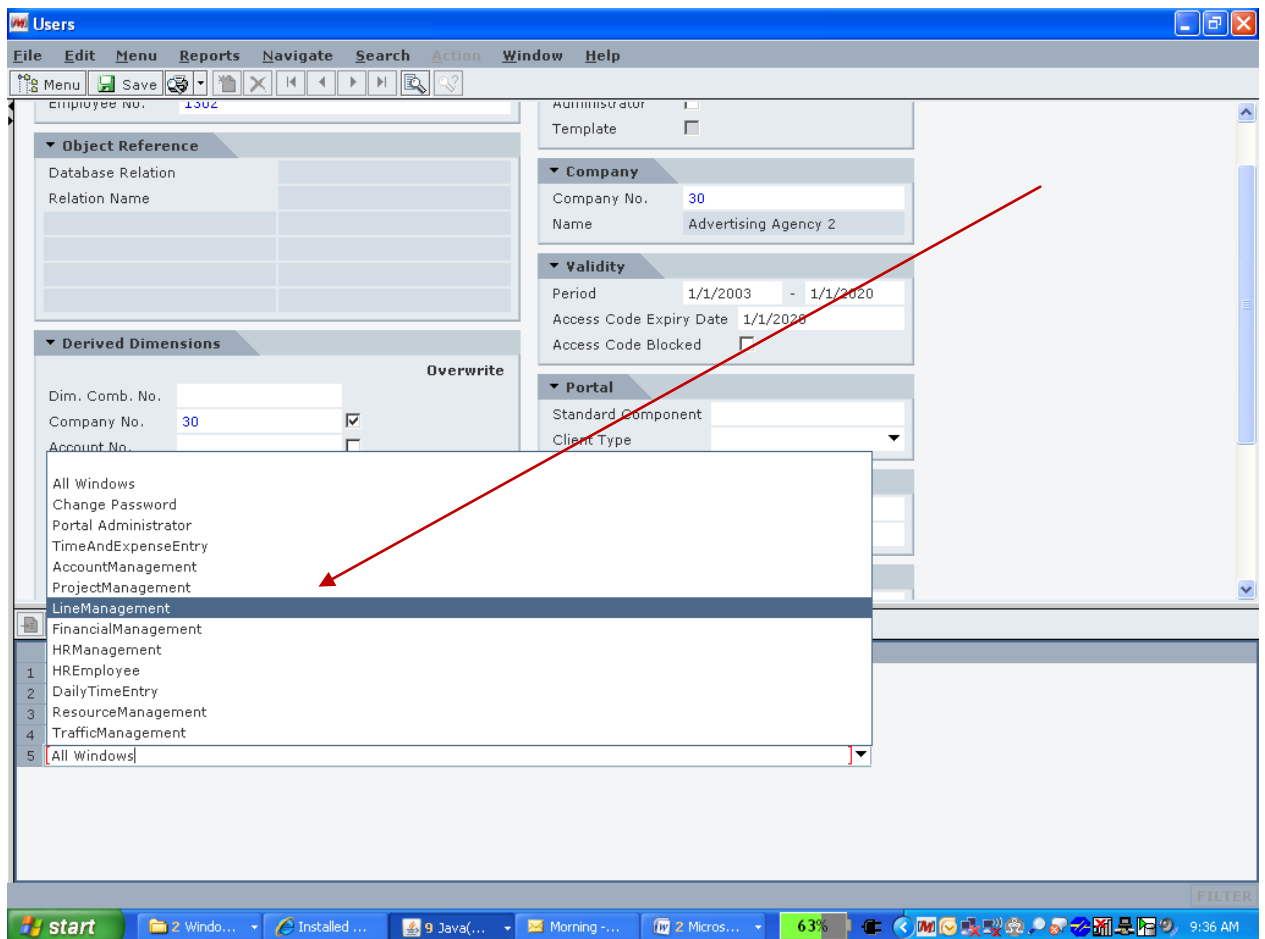
- 1) Navigate to the employee card (menu > set up > set up > employee)
- 2) In the employee card, locate the Supervisor island. In this island, click in the employee number island and search for the new person assigned to be their supervisor (ctrl +G).

The screenshot displays the 'Employees' application window. The 'Supervisor' island is visible, showing 'Employee No.' 1103 and 'Name' Edward Powers. A red arrow points to the 'Employee No.' field. A 'Find Employee Information' dialog box is open, showing a search criteria table with the following data:

Criteria:	Employee #	Name 1	Name 2	Name 3
1	1101	Andy Pol...		
2	1102	Laura Sc...		
3	1103	Edward ...		
4	1104	Lisa Welsh		
5	1105	Martin Fr...		
6	1106	Jeff Sch...		
7	1107	John W. ...		
8	1201	Sue Fren...		
9	1202	Kevin Su...		
10	1203	Debra G...		
11	1204	Lance M...		
12	1205	Micho Sp...		
13	1206	Celine C...		

The dialog box also shows a 'Search' section with 'Advanced' criteria and a table with columns for 'Employee #', 'Name 1', 'Name 2', and 'Name 3'. The 'Criteria:' column is highlighted in red. The 'Find Employee Information' dialog box is positioned over the 'Supervisor' island, and a red arrow points from the 'Employee No.' field in the 'Supervisor' island to the 'Criteria:' field in the dialog box.

- 3) If the person you have assigned to be a supervisor is not currently assigned as a supervisor in Maconomy, you need to assign that role to them.
- 4) To do so, navigate to Menu > Set up > Access Control > Users
- 5) In this window, look in the table part to see if the user who you have chosen to be a Supervisor is actually attached to the role (in Maconomy, a supervisor may also be referred to as Line Management in the table part). They should have Line Management attached to them. If not, click in the blank row in the table and do a search to locate the role of line management.



- 6) Hit Enter to save your changes. The user has now been set up to be a Supervisor and will receive appropriate To Do's for expense and time approval.