PAMS | UCLA Research Administration
Post Award Management System

Admin06 – Personnel

Summary

Below are some of the main elements of the Personnel page:

Purpose

The purpose of the Personnel page is to allow department administrators to manage their personnel assignments, including reassigning workload when an individual is out of the office. Below is a sample view of the Personnel page:

Screen Group

The Personnel page is located under the Administration Tab, which can be accessed using the top menu in PAMS:
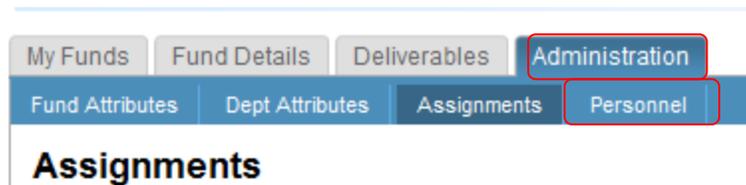
Screen View

The Personnel page is visible to all. The screen consists of the Permanent Reassignments section (green box) and the Personnel Assignments grid (red box):

Permanent Reassignments:

The Permanent Reassignments section features the Change Assignments Permanently Button. This button will always appear, but only users with Admin rights can click this button:

If the user clicks this button they will navigate to the "Reassign Permanently popup":

In this popup, the user can select Employees from the dropdowns that they wish to reassign. Once the Employees are selected, the user clicks save changes to assign all assignments from the current selected employee to the newly selected employee.

Personnel Assignments Grid

The Personnel Assignments Grid lists all employees under that dept or EFM structure. The grid also shows Employees that have been temporarily reassigned, and can be used to make temporary reassignments:

Personnel Assignments

Employee Name	Default Owner	Temporary Reassignment	Reassignment Effective Date	Reassignment End Date	Manage Temporary Reassignment
					Edit
					Edit
	✓				Edit
					Edit
					Edit
					Edit

The grid displays the following:

Employee Name: All employees under that department or EFM structure will be listed in the grid. The names are listed alphabetically. If a user in Temporary Reassignment leaves the Institution, changes department structures, or is removed from PAMS, the assignments will go back to the default structure.

Default Owner: There must be one Employee noted as the Default Owner under User Type. There cannot be more than one Default Owner. If there is an assignment missing from the Assignments page, the Default Owner will be listed. This field is only editable if the user clicks Edit. If the default owner leaves the Institution, changes dept structures, or is removed from PAMS, ORIS will receive a notice/report. ORIS will then notify a Business Analyst who will work with the department to determine the new default owner. Only a user with the following titles can be a default owner: Department Administrator, EFM Supervisor or EFM AD. When the user clicks edit, the Default Owner checkbox will not be displayed if the user does not have an approved role from the aforemention list, if the user does have a listed role then the checkbox will be displayed as enabled.

Personnel Assignments

Employee Name	Default Owner	Temporary Reassignment	Reassignment Effective Date	Reassignment End Date	Manage Temporary Reassignment
					Edit
					Edit
	✓				Edit
					Edit
					Edit
					Edit

Temporary Reassignment: Dept Administrators can temporarily reassign another employee's workload. This field is only editable if the user clicks Edit:

Personnel Assignments

Employee Name	Default Owner	Temporary Reassignment	Reassignment Effective Date	Reassignment End Date	Manage Temporary Reassignment
					Edit
					Edit
	✔				Edit
					Edit
					Edit
					Edit

When the user clicks Edit, all other Employee Names on this page will appear in a drop-down box:

Personnel Assignments

Employee Name	Default Owner	Temporary Reassignment	Reassignment Effective Date	Reassignment End Date	Manage Temporary Reassignment
		--SELECT-- / BRUIN, JOE / BRUIN, JOSEPHINA			Save Cancel
					Edit
	✔				Edit
					Edit
					Edit
					Edit

If the user picks a name from the drop-down, their name will appear in this field once the user clicks Save. The name will appear here until it is cleared by a user, even if the reassignment date has passes. If a user in the Temporary Reassignment leaves the Institution, changes department structures, or is removed from PAMS, the assignments will go back to the current structure.

Reassignment Effective Date: If users pick an Employee from the drop-down for Temporary Reassignment, they must enter a reassignment effective date. This date will appear once the user clicks Save.

Personnel Assignments

Employee Name	Default Owner	Temporary Reassignment	Reassignment Effective Date	Reassignment End Date	Manage Temporary Reassignment
		--SELECT--			Save Cancel
	✔				Edit
					Edit
					Edit
					Edit

◄ **March, 2016** ►

Su	Mo	Tu	We	Th	Fr	Sa
28	29	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today: March 10, 2016

The date will appear until it is cleared by a user, even if the date has passed. If the date has not passed, the employee name entered in the Temporary Reassignment will appear for all assignments, instead of the employee under Employee Name. Once the date has passed, the employee name entered in the Temporary reassignment column will no longer appear for all assignments.

Reassignment End Date: If users picks an Employee from the drop-down for Temporary Reassignment, they must enter a reassignment end date. This date will appear once the user clicks Save.

The date will appear until it is cleared by a user, even if the date has passed. If the date has not passed, the employee name entered in the Temporary Reassignment will appear for all assignments, instead of the employee under Employee Name. Once the date has passed, the employee name entered in the Temporary reassignment column will no longer appear for all assignments.

Manage Temporary Reassignments: The Edit button should always appear, but only users will Admin rights can click this button:

If the user clicks on the Edit button, the Save and Cancel buttons will appear in it's place:

Personnel Assignments

Employee Name	Default Owner	Temporary Reassignment	Reassignment Effective Date	Reassignment End Date	Manage Temporary Reassignment
		--SELECT--			Save Cancel
					Edit
	✓				Edit
					Edit
					Edit
					Edit

If the user clicks on the Edit button, they can edit Default Owner, Temporary Reassignment, and Reassignment Date. If the user clicks Cancel, any change they made will not be saved and the user will exit Edit mode. If the user clicks Save Changes, all changes made will be saved and the user will exit Edit mode.

Report Generation

The Personnel grid can be sent to Excel.

Page Access

The Personnel page is viewable to all, but only those users with Admin rights can make changes to personnel assignments.