Supervisor and Approver Update Request Form

Revision History

<table>
<thead>
<tr>
<th>Date</th>
<th>Revision</th>
</tr>
</thead>
<tbody>
<tr>
<td>October 1, 2021</td>
<td>Guide Creation</td>
</tr>
</tbody>
</table>
Introduction
The Office of Human Resources has implemented this system in order to automate the Supervisor and Approver Update Request process. This training guide focuses on the following actions in BP Logix:

1. How to create and submit a Supervisor and Approver Update Request form
2. How to view and check on the status of the form

Access within the System
Each user on campus has been categorized into a particular user group, which provides them certain permissions in the BP Logix system. Please see below for a brief overview of access granted to different types of users:

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requestor</td>
<td>Allowed to enter a Supervisor and Approver Update Request form and view forms they have submitted</td>
</tr>
<tr>
<td>Approver</td>
<td>Allowed to review and approve Supervisor and Approver Update Request forms assigned to them</td>
</tr>
</tbody>
</table>

Modes of Training
The recruitment team in the Office of Human Resources understands that every individual has a different learning style. Please see below for the various modes of training offered on this piece of the BP Logix system:

- If you would like to have an in-person or Microsoft Teams meeting with a member of the recruitment team to walk you through creating a Supervisor and Approver Update Request form, please contact the college/department recruitment and hiring contact for your area or call the Office of Human Resources at 920-424-1166 and schedule a time for this meeting.

- If you would like to have a member of the recruitment team walk you through creating a Supervisor and Approver Update Request form over the phone, please contact the college/department recruitment and hiring contact for your area or call the Office of Human Resources at 920-424-1166.

- If you feel comfortable solely using this training guide to create your Supervisor and Approver Update Request form, this is acceptable. Please know that a member of the recruitment team may reach out to you if there are any follow up items up for discussion.
Homepage Tips

When you log in to BP Logix, you should see a homepage similar to this one. Please familiarize yourself with the options on this page.

1. UWO forms - The BP Logix system will be used for multiple forms across campus. This tab lists all the forms you have access to submit.
2. Tasks assigned to me - Requests listed here require your review and approval.
3. My submissions - All active and complete requests you have made can be viewed here.
4. Logoff - Use this link to ensure you securely log out of the system.

Step 1: Log into BP Logix
To log into the BP Logix system, you may follow the link below:

uwosh.bplogix.net

Your username and password is pre-set as your NetID.

Step 2: Supervisor and Approver Update Request form
From your home page, click on “UWO Forms”. This will display all the forms you have access to. Click on Supervisor and Approver Update Request form.
### Step 3: Fill in form

Fill in all the required information on the form for your request.

<table>
<thead>
<tr>
<th>College or Department:</th>
<th>Previous Supervisor or Department Chair</th>
<th>New Supervisor or Department Chair</th>
<th>Primary Time and Absence Approver</th>
<th>Backup time and Absence Approver</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Select One)</td>
<td>[Search for user]</td>
<td>[Search for user]</td>
<td>[Search for user]</td>
<td>[Search for user]</td>
<td></td>
</tr>
</tbody>
</table>

**Employee Name:**
- [Search for user]

**Employee Job Title:**
- [Select One]

**HRS Employee ID:**
- [Select One]

**HRS Record:**
- [Select One]

**Campus:**
- [Select One]

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**Notes:**

```
[Source] [Bold] [Italic] [U] [A] [Font] [Size]
```

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**Helpful tips**

Anything marked in red is a required field and must be filled in. The system will not push forward the request until all required fields are complete.
Step 4: Submit for approval
Complete all required fields on the form and click “Submit” to submit your request. You will receive an automatic email from the system acknowledging the request you have submitted.
How to view active and/or completed submissions

You can view your requests at any time by clicking on the “My Submissions” link from your home page:

You can use the following search fields and drop down menus to filter your requests:

You can also quickly view what approval step your request is on and when it was last updated from this screen:
If you would like to see all the details of your request, including the approval history and any comments, click on the name of your request:

My Submissions (69 items)

And then scroll to the bottom of the form:

<table>
<thead>
<tr>
<th>Participant</th>
<th>Signature</th>
<th>Completed</th>
<th>Status</th>
<th>Result</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

An approver may ask for more information regarding your request. Once you receive that email, you may log into the system, and click on the “Tasks Assigned to Me” Link and click on the name of the request this pertains to:

PTF Permanent/Temporary Base Adjustment Margaret Cosmutto 1234567 Effective 3/16/2021
Provide the additional information the approver is requesting in the text box and click the “Submit New Information” button. This information will be shared with the approver and they will complete their review.

**Email notifications**
The BP Logix system will send out automatic emails throughout the process. Here is a breakdown of when and who receives those communications:

<table>
<thead>
<tr>
<th>Email Recipient</th>
<th>Communication</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification to Requester</td>
<td>Request has been received</td>
</tr>
<tr>
<td>Notification to Requester</td>
<td>Request has been approved/declined</td>
</tr>
<tr>
<td>Notification to Requester</td>
<td>Approver needs more information; requestor resubmittal</td>
</tr>
<tr>
<td>Notification to Approver</td>
<td>Request needs review and approval</td>
</tr>
</tbody>
</table>