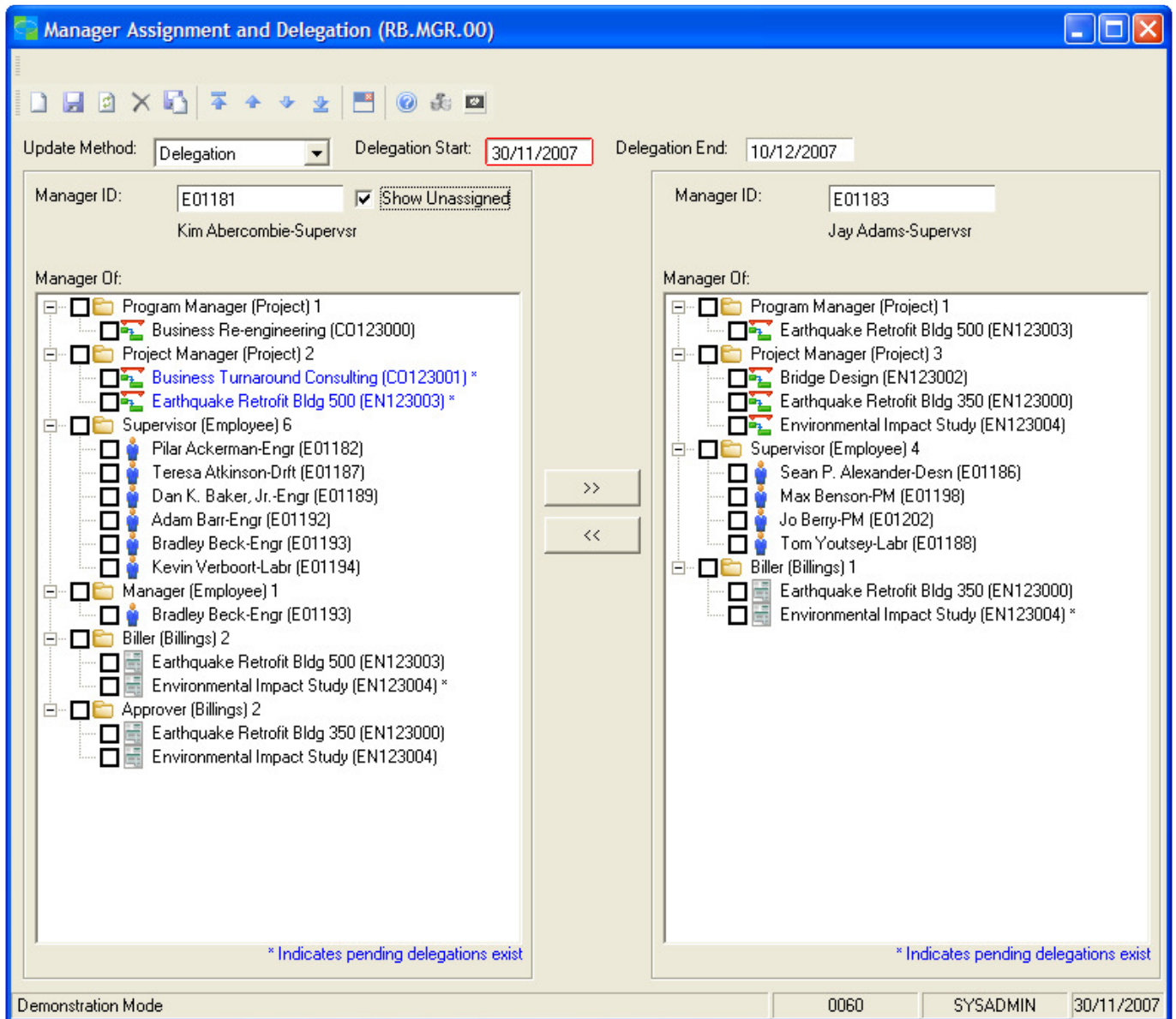




Manager Assignment and Delegation enables the transfer of Projects, Billings or Employees from one Manager to another. This may be a permanent re-assignment or a temporary delegation. Temporary delegations are used when Managers take leave or are away from the office for business and cannot complete their own approvals.



When a Manager is selected the 'Manager of' frame will display each Role the Manager performs and the Projects or Employees they manage within that Role. Simply select the roles or individual assignments and then click the transfer buttons in the centre of the screen to transfer the selected records to the alternate Manager.

An \* next to the Project or Employee indicates that it has planned re-assignment (Delegation). Right clicking on the item will display a menu that enables drilldown to review the delegation schedule details.

**BUSINESS NEED (ROI)**

- # Re-Assign Project, Billings and Employee Managers from one Manager to another.
- # Delegate Project, Employee and Billing Approvers to an alternate Manager for a designated period.
- # Identify all unassigned (unmanaged) Projects or Employees and assign them appropriately.

**MANAGEMENT ROLES THAT ARE DISPLAYED**

When a Manager is selected the following Roles will be displayed for that Manager:

- # All Projects they manage as Project Manager 1 or 2.
- # All Employees they manage as Employee Manager 1 or 2.
- # All Projects they are the BI Billings Approver for.

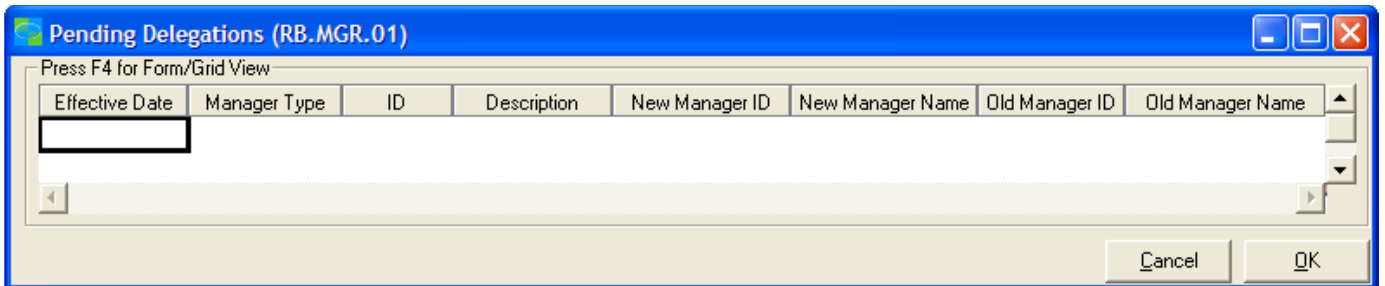
**ASSIGNMENT OR DELEGATION METHODS**

There are two key Methods of Manager Transfer that can be performed.

- Assignment**      On [Save] of the re-assignments the Project and Employee records are updated immediately.
- Delegation**      When the Delegation method is selected two date fields are enabled that allow the definition of the From and To dates for the temporary delegation. A Windows Service polls for pending delegations each night and processes required re-assignments. All records are updated including; Employees, Projects, Unapproved Timecards, Unapproved Expense Claims and Unapproved Project Billings.

**FUTURE DELEGATIONS**

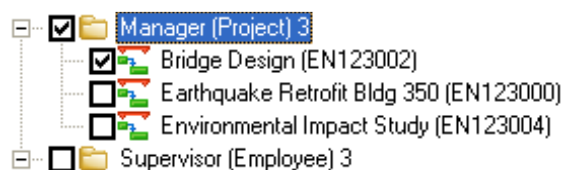
The item will display in blue with an \* next to it where the pending delegations exists for that item. Using the mouse 'Right Click' will display a menu to View Delegations. This opens a screen displaying pending delegation details.



**SHOW UNASSIGNED**

A 'Show Unassigned' checkbox is available in the left hand frame. This displays all Projects and Employees that do not yet have a Manager Assigned for either Manager Role. This is a very handy option for identifying all Projects or Employees that do not have a Manager.

**TREE CONTROL**



- There are two levels in the tree control.
- Role**      Project Mgr 1-2, Employee Mgr 1-2, Billing Approver. Selecting a role selects all items in that role. Displays the number of managed items for the role.
- Item**      Defines each project or employee that is managed by the applicable role.