

The Project Management role allows project managers to add projects, assign members, assign organizational members, attach and detach sub-projects, and deactivate projects. You may also delegate projects to other project managers, change project managers, and assign accounts to projects.

Note: Before the Project Manager adds a project, they need to be given access to the accounts that will be available to associate with the project.

Project Manager Main Menu Options



THE PROJECT MANAGER ROLE MAY:

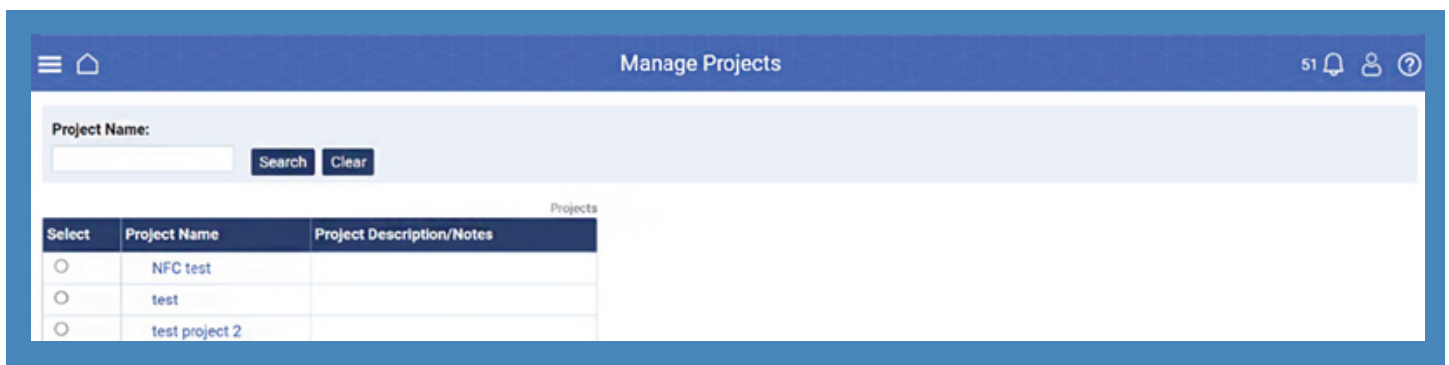
Manage Projects – used to search for, add, or deactivate a project; add members to a project or organization; or attach or remove a subproject to an existing project.

Reports Module – used to send reporting processes to separate application servers and database servers which minimizes the impact of running reports involving large amounts of data.

Publish Reports – used to make reports available to a specific role in a specific organization or to an individual employee.

My Delegates – used to add or remove a delegate from a specific project.

Manage Projects



1. Select the **Manage Projects** link from the Projects menu. The Manage Projects page is displayed.
2. Enter the **Project Name** and select the **Search** button.
OR
Select from the list of projects that have been previously established. The Project Edit page is displayed.
3. Complete the applicable fields.
4. Select the **Save** button. The message Successfully saved project is displayed.

Add a Project

Manage Projects ·

Items marked with an asterisk * are required.

* Name:

Description:

Manager:

* Start Date:

* Account:

Project Code:

1. Select the **Manage Projects** link from the Projects menu. The Manage Projects page is displayed.
2. Select the **Add Project** button. The Project Edit page is displayed.
3. Complete the fields.
4. Select the **Save** button. The message Successfully saved project is displayed.

Add Members to a Project

Manage Projects · Members

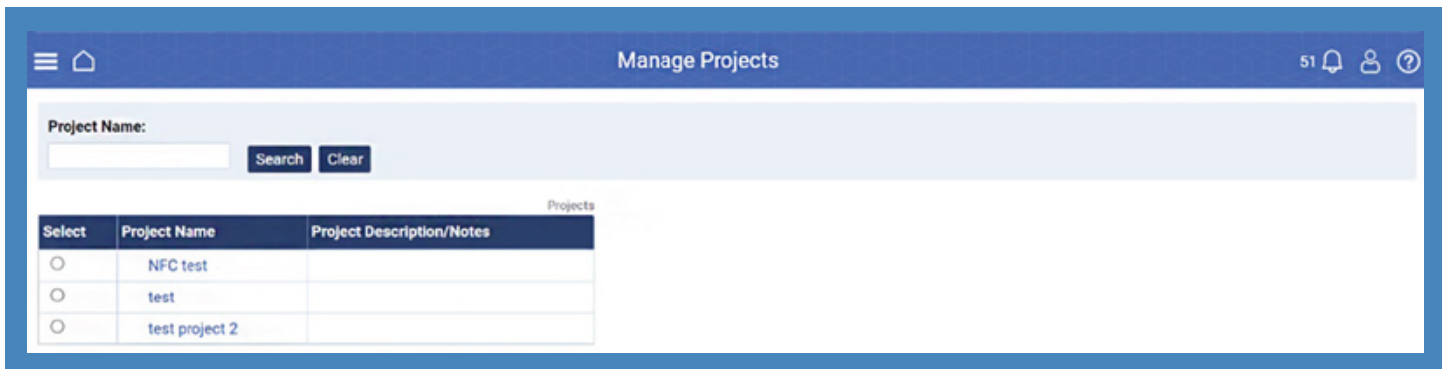
Name:

Name	Select
Administrator, Training - trainadmin	<input type="button" value="Select"/>
Doe, Betty - doeb	<input type="button" value="Select"/>
Doe, Adam - doea	<input type="button" value="Select"/>
Ememp2, Sunemp2 - sunemp2	<input type="button" value="Select"/>
EmEmp3, Suemp3 - suemp3	<input type="button" value="Select"/>
EmEmp4, Suemp4 O - suemp4	<input type="button" value="Select"/>
EmEmp6, Suemp6 B - suemp6	<input type="button" value="Select"/>
Emhradmin_2, Shradmin_2 - sunnye	<input type="button" value="Select"/>
Employee, John - employeej****	<input type="button" value="Select"/>
Emsuemp5, Sunemp5 L - sunemp5	<input type="button" value="Select"/>
Emsup3, Susup3 B - susup3	<input type="button" value="Select"/>
Emsup4, SuSup4 N - susup4	<input type="button" value="Select"/>
Emsup5, SuSup5 T - susup5	<input type="button" value="Select"/>
EmTest8, SuTest8 V - shradm3	<input type="button" value="Select"/>
EmTester8, Stester8 V - tester8	<input type="button" value="Select"/>
EmTesterA, StesterA K - steste	<input type="button" value="Select"/>
Doe,Edward - doee	<input type="button" value="Select"/>

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1. Select the **Manage Projects** link from the Projects menu. The Manage Projects page is displayed.
2. Select the **Members** button. The Members page is displayed.
3. Select the **Add Members** button. The Select User - Select Project Members page is displayed.
4. Enter the name of the project member, then select the **Search** button.
OR
Select the **Select** button of the name of the member from the list. The Members page is displayed.
5. Select the **Add Members** button.

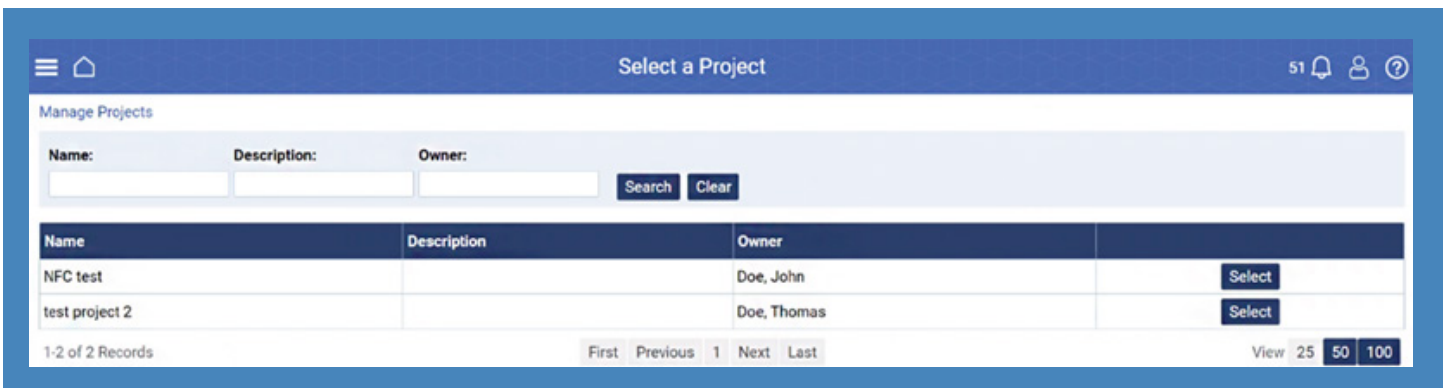
Add Members to an Organization



1. Select the **Manage Projects** link from the Projects menu. The Manage Projects page is displayed.
2. Select the **Org. Members** button. The Org. Members page is displayed.
3. Select the **Add Organization** button. The page Organization Management: - Select Org. Members page is displayed.
4. Enter the organization and select the **Search** button.
OR
 Select the **Select** button of the applicable organization in the list. The Org. Members page is displayed.

Note: Select the trash can  icon to remove the organization.

Attach a SubProject



1. Select the **Manage Projects** link from the Projects menu. The Manage Projects page is displayed.
2. Select the **Attach SubProject** button. The Select a Project page is displayed.
3. Complete the fields.
4. Select the **Search** button. The SubProject is attached.

Deactivate a Project

1. Select the **Manage Projects** link from the Projects menu. The Manage Projects page is displayed.
2. Select the applicable project.
3. Select the **Deactivate** button. The message Deactivated projects cannot be reactivated. All project members and orgs. will be removed from the project upon deactivation. SubProjects will also be deactivated. Are you sure you want to deactivate the project:
4. Select the **Yes** button to deactivate.
OR
 Select the **Cancel** button to cancel the request.