My Team Overview

Quick Links provide the manager access to areas of the application pertaining to the manager's team. The manager can access standard reports, dashboards, and share permissions pages as well as assign training for the entire team. The manager can mouse over the black arrow on their ID card to access these quick links.
Share Permissions

To share permissions, from the My Team page, place the computer mouse over the black arrow of your ID card on the left. From the list of options that appears to the right, select Share Permissions. This opens the Share Permissions page. Note: The Share Permissions option is only available to managers with permission to delegate permissions. Not all options may be available.

The Delegate(s) are the people to whom you want to assign your permissions. The Direct Reports are the people for whom the delegate you select will be sharing the permissions you assigned. Select the Delegates by clicking on the Select Delegates blue hyperlink or Add icon. Select the "Direct Reports" by clicking on the box next to each name of the employee you wish the delegate to share your permissions for.
After clicking on “Select Delegates” on the previous page, the manager can search for delegates by Last Name, First Name, User ID, or Manager’s Last Name. The manager can also filter the listed users to only their direct reports by selecting the **Direct Reports Only** option. The manager can add as many delegates as necessary by clicking the **Add** icon to the left of the user’s name. After selecting the appropriate delegates, click the **Done** button in the pop-up.

The selected delegates will appear in the Delegates section. A trash can icon appears next to the name, indicating you can remove the delegate if you no longer wish them to have shared permissions.

The manager then has two options to delegate manager permissions to the selected delegates:

- **Add Delegates** - Click the Add Delegates link to delegate all of the available permissions for all of the manager's selected direct reports to the selected delegates. (See the next page for a more in-depth description of the Add Delegates process.)
- **Define Access by Permission** - Click the Define Access by Permission link to select which permissions are delegated for which of the manager's employees to the selected delegates.
Share Permissions – Add Delegates

Note: This is a more in-depth description of the Add Delegates process. On the Share Permissions page, clicking the Add Delegates link delegates all of the available permissions for all of the manager's selected direct reports to the selected delegates.

To utilize the Add Delegates functionality:

1. From the Share Permissions page, click the Select Delegates link to select the delegates to which you are delegating permissions. At least one delegate must be selected.

2. In the Direct Reports section, select the direct reports for which you are delegating permissions. You may also delegate manager permissions for a direct report's subordinates by selecting the Include Subordinates option to the right of the direct report. At least one direct report or direct report's subordinates must be selected. The delegates selected in Step 1 will have all manager permissions for the selected direct reports.

3. Click the Add Delegates link. The selected delegates are moved to the Users Sharing Your Permissions section. You may edit their permissions by clicking the Edit Permissions icon. This opens the Define Access by Permission page with all of the permissions selected.
Share Permissions - Define Access by Permission

On the Share Permissions page, the Define Access by Permission link allows managers to select which permissions are delegated for which of the manager's employees to the selected delegates.

To utilize the Define Access by Permission functionality:

1. From the Share Permissions page, click the Select Delegates link to select the delegates to which you are delegating permissions. At least one delegate must be selected.

2. From the Share Permissions page, click the Define Access by Permission link. This opens the Define Access by Permission page.

3. In the Select Permission column, select the permissions that are being delegated to the selected delegates. At least one permission must be selected.

4. In the Select which users the permission applies to column, select the direct reports for which you are delegating the permission. You may also delegate manager permissions for a direct report's subordinates by selecting the Include Subordinates option. At least one direct report or direct report's subordinates must be selected for each selected permission.

5. After making the appropriate selections, click the Save button at the bottom of the page.