

Managers Setup & Maintenance

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Managers Setup & Maintenance

Overview

Production Managers in *Evolution* are users who are associated with one or more technicians. When necessary, managers reassign cases to different technicians, put cases on and take cases off production hold, reroute cases to previous steps due to internal remake situations and monitor the work of the technicians who are assigned to them. Management tasks are conducted in **EvoData** and **EvoManager Mobile App**, typically, using an administrative log in.

Setting a User as a Manager

1. From the **Maintenance** menu, choose **Users** to access the “Users” form.
2. Select the user from the *Users* grid by clicking and highlighting the row.
3. Check the *Is Manager* box and **Save** your changes.

NOTE: If the manager will also be completing steps, they should be flagged as *Is Technician* also.

The screenshot shows the EvoManager Users form. On the left is a grid of users. The 'Users' grid has columns: Full Name, User Name, Tech ID, and Local. The user 'Bonnie (Removable)' is selected. On the right is the 'User Details' panel. It contains fields for User name (Bonnie), Full name (Bonnie (Removable)), Password, and Tech Touchscreen Logon ID (456). There are checkboxes for 'Is Inactive', 'Is Sales Person', 'Is Manager' (checked), 'Is Technician' (checked), 'Is Multi-Location', 'Shipping-NO Time clock', 'Interim Receiving', 'Use Dynamic Display', 'Use Unit Limited Display', 'Use Scan Case Metal Entry', and 'Block Invoice Price Change'. There are also sections for [Security Settings], [Contact Info], [Location], [Default Printers], [Pay Level], and [Capacity Planning]. A red arrow points to the 'Is Manager' checkbox.

Full Name	User Name	Tech ID	Local
Adam Thomas	Adam	457	ABS I
Administrator	admin	1	ABS I
Anissa Russell	Anissa	15	ABS I
Barbara Knighton	Barbara		ABS I
Barry Salesperson	Barry	986	ABS I
Bonnie (Removable)	Bonnie	456	ABS I
Chris Cross	ChrisC	343	ABS I
Cindy Salesperson	Cindy		ABS I
David Dash	David	111	ABS I
Dennis Driver	Dennis		ABS I
Eric (Ortho)	Eric	789	ABS I
Jason Lab	Jason	1337	ABS I
Joe (Fixed)	Joe	123	ABS I
Keith Dickson	Keith	333	ABS I
Ken Sparks	Ken	211	ABS I
Krista Hill	Krista	222	ABS I
Leslie Fields	Leslie	444	ABS I
Margo Stamm	Margo	161	ABS I
Model	Model	11	ABS I
Robin Driver	Robin		ABS I
Shipping	Shipping	99	ABS I
Shipping Manager	ShipM	999	ABS I
Sissy Lewis	Sissy		ABS I
Small Lab Admin	Small Lab		ABS I
TryInRecTech-ABS	TryInRec-ABS	555	ABS I
Greater Dental Shipping	GreaterDental Ship	88	Grea
GreaterDental Tech	GreaterDental	667	Grea
TryInRecTech-Greater	TryInRec-Greater	777	Grea
Default Manager	Manager	2	ABS I

User Details

User name: Bonnie
Full name: Bonnie (Removable)
Password: <password>
Tech Touchscreen Logon ID: 456

☐ Is Inactive
☐ Shipping-NO Time clock
☐ Interim Receiving
☐ Use Dynamic Display
☐ Use Unit Limited Display
☐ Use Scan Case Metal Entry
☐ Block Invoice Price Change

☐ Is Sales Person
☒ Is Manager
☒ Is Technician
☐ Is Multi-Location

[Security Settings]
Profile: Default Manager

[Contact Info]
Home Phone:
Cell Phone:
eMail:
Page/Text Msg:

[Location]
ABS Dental Lab

[Default Printers]
Invoice Printer:
Certificate Printer:
Disclosure Printer:
Work Ticket Printer:
Work Ticket Label Printer:

[Pay Level]
☒ Hourly Rate: \$0.00
☐ Production

[Capacity Planning]
Daily capacity (mins): 200
Percentage of Capacity:

Manager: Bonnie (Removable)
Created By:
Date:
Modified By:
Date:

Add New Save

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Adding a New Manager

1. From the **Maintenance** menu, choose **Managers** to access the “Manager Techs” form.
2. Select **Add New** and select the manager from the drop down list. NOTE: Only users coded as **Is Manager** on the **Users** form will appear in the *Managers* drop down list.

The screenshot shows the 'Manager Techs' form. On the left, there is a table titled 'Managers' with columns 'Inactive' and 'Short Name'. The table lists several managers: Anissa, Fixed, FwdSchMgr, Ortho, Removable, Shipping, and <change>. The 'Shipping' row is selected. On the right, there is a 'Main' tab with a '[Manager Info]' section. This section includes an 'Inactive' checkbox, a 'Manager' dropdown menu, and a list of managers: Anissa Russell, Barbara Knighton, Barry Salesperson, Bonnie Manager-Removable (highlighted), Eric Manager-Ortho, FwdSchedMgr, Joe Manager-Fixed, Sarah Marshall, and Shipping Manager.

3. If desired, you may enter a **Short Name** and **Full Name/Desc** in those fields.
4. Select **Save** to save your changes.

The screenshot shows the 'Manager Techs' form. On the left, the 'Managers' table is the same as in the previous screenshot. On the right, the 'Main' tab is still selected. The '[Manager Info]' section now shows the 'Manager' dropdown menu set to 'Bonnie Manager-Removable'. Below this, there is a 'Short Name' field with the text 'Rem' and a 'Full Name/Desc' field with the text 'Bonnie's Team'. At the bottom right, there are two buttons: 'Add New' and 'Save' (highlighted with a mouse cursor).

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Linking Technicians to Managers

1. From the **Maintenance** menu, choose **Managers** to open the “Manager Techs” form. All previously defined Managers are listed, with the “Inactive” Managers flagged.

The screenshot shows the 'Manager Techs' window. On the left, a table lists managers with an 'Inactive' checkbox. Jolie's row is highlighted, and her 'Inactive' checkbox is checked. A red box highlights this checkbox. A text box on the right states: 'Inactive Users may not be assigned to any cases or allowed access to the Time Clock.'

Inactive	Short Name
☐	BeckyH
☐	Bonnie
☐	Isabella
☒	John
☒	Jolie
☐	Ken
☐	Larry
☐	Mark
☐	Mary
☐	Rodney
☒	Shipping
☒	Steven
☐	Tim

[Manager Info]

☒ Inactive

Manager: [Dropdown]

Short Name: Jolie

Full Name/Desc: Sales Team

[Techs]

Tech Lead: [Dropdown] Tech Name: [Text]

Add New Save Add Remove Transfer

2. Managers and technicians appear in alphabetical order based on the Full Name field on the **Users** form. Click on and highlight the **Active** manager for whom you want to assign technicians.

The screenshot shows the 'Manager Techs' window with Ken selected as the manager. The 'Inactive' checkbox is now unchecked. The technicians list on the right is also visible.

Inactive	Short Name
☐	BeckyH
☐	Bonnie
☐	Isabella
☒	John
☐	Jolie
☒	Ken
☐	Larry
☐	Mark
☐	Mary
☐	Rodney
☒	Shipping
☒	Steven
☐	Tim

[Manager Info]

☐ Inactive

Manager: Ken Sparks

Short Name: Ken

Full Name/Desc: Team for Ken Stark

[Techs]

Tech Lead: [Dropdown] Tech Name: [Text]

Add New Save Add Remove Transfer

Processing Complete...

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- Click **Add** to activate available technicians. (NOTE: For technicians to appear in this form, they must be flagged as **Is Technician** in the **Users** form.) Highlight the tech and click **Continue**. You can use your *Shift* and *Ctrl* keys to select multiple techs. The selected technician(s) now appear in the **Techs** grid; click to activate **Tech Lead**, if the technician is considered a lead technician under the manager.

The screenshot shows the 'Manager Techs' window with the 'Main' tab selected. On the left, a list of managers is shown with checkboxes. 'Ken' is selected. In the center, a 'Select One or More Techs' dialog box is open, displaying a list of technicians with their 'User Name' and 'Full Name'. 'Anissa Russell' is selected. On the right, a 'Techs' grid is visible, showing a list of technicians with checkboxes. 'Anissa Russell' is highlighted. At the bottom, there are 'Continue' and 'Cancel' buttons.

Inactive	Short Name
☐	BeckyH
☐	Bonnie
☐	Isabella
☐	John
☒	Jolie
☒	Ken
☐	Larry
☐	Mark
☐	Mary
☐	Rodney
☒	Shipping
☒	Steven
☐	Tim

User Name	Full Name
Anissa	Anissa Russell
barbara	Barbara Knighton
Sandra	Sandra Entry
Shipping	Shipping Department

Tech Lead	Tech Name
☒	Anissa Russell
☐	Becky Little
☐	Chris Cross
☐	Cindy Moore
☐	Die Prep Technician
☐	Eric Petty
☐	Jasen Hamm
☐	Jeremy Kinsey
☐	Jerry Small
☐	Jolie Pitt
☐	Joseph Holmes
☐	Justin Gatty
☐	Ken Sparks
☐	Krista Hill
☐	Model Technician
☐	Ronald Kensington
☐	Ryan Trulove
☐	Wayne Thomas

- Repeat these steps until all applicable technicians have been assigned to the manager and appear in the **Techs** grid. Assigned technicians will continue to display in this grid in the order they were selected. Technicians will display in alphabetical order according to their "Full name" from the **Users** form.

The screenshot shows the 'Manager Techs' window with the 'Main' tab selected. On the left, the same list of managers is shown, with 'Ken' still selected. In the center, the 'Manager Info' section is visible, showing 'Ken Sparks' as the manager and 'Ken' as the short name. On the right, the 'Techs' grid is updated, showing 'Anissa Russell' as the selected technician. At the bottom, there are 'Add New' and 'Save' buttons.

Inactive	Short Name
☐	BeckyH
☐	Bonnie
☐	Isabella
☐	John
☒	Jolie
☒	Ken
☐	Larry
☐	Mark
☐	Mary
☐	Rodney
☒	Shipping
☒	Steven
☐	Tim

Manager
Ken Sparks

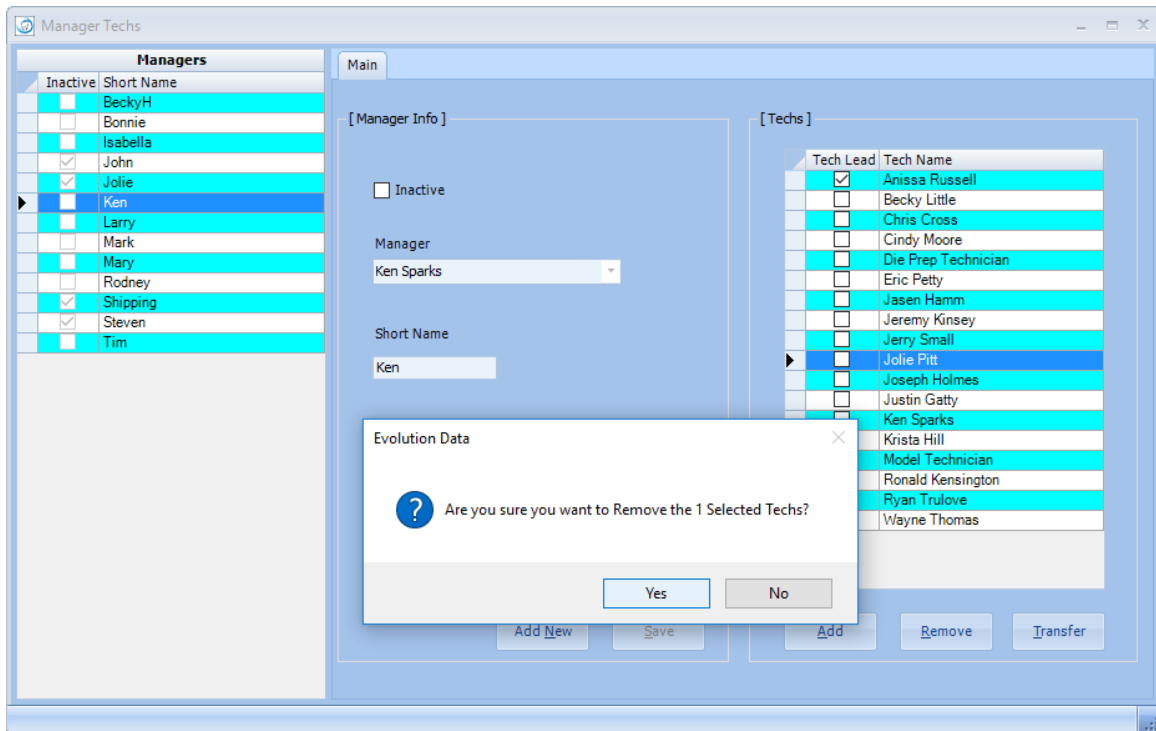
Short Name
Ken

Full Name/Desc
Team for Ken Stark

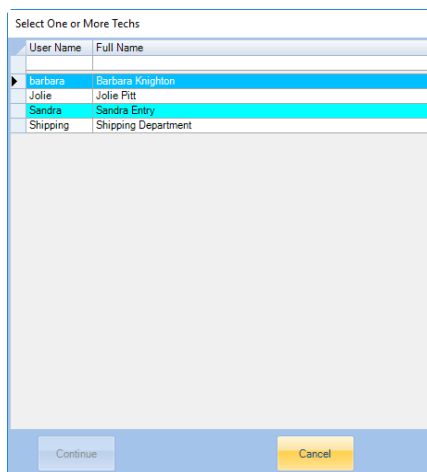
Tech Lead	Tech Name
☒	Anissa Russell
☐	Becky Little
☐	Chris Cross
☐	Cindy Moore
☐	Die Prep Technician
☐	Eric Petty
☐	Jasen Hamm
☐	Jeremy Kinsey
☐	Jerry Small
☐	Jolie Pitt
☐	Joseph Holmes
☐	Justin Gatty
☐	Ken Sparks
☐	Krista Hill
☐	Model Technician
☐	Ronald Kensington
☐	Ryan Trulove
☐	Wayne Thomas

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- If you incorrectly assign a tech, locate and highlight the technician in the **Techs** grid. Click **Remove**; a popup menu will ask to confirm the removal. Click **Yes**.



- The selected technician will transfer back into the available technician list to be reassigned.



Working managers who have been coded **Is Manager** and **Is Technician** on their **Users** form will appear in both grids for selection. You should always link a working manager to their self, as their production work is part of their departmental load.

Inactivating Managers

1. From the **Maintenance** menu, choose **Managers** to open the “Manager Techs” form.
2. Before inactivating a manager, disassociate and reassign their technicians to another manager.
3. Select and highlight the manager in the *Managers* grid.
4. Check the *Inactive* box and **Save** your changes.

The screenshot shows the 'Manager Techs' form. On the left is a 'Managers' grid with columns 'Inactive' and 'Short Name'. The 'Shipping' manager is selected and highlighted in blue. The 'Inactive' checkbox for 'Shipping' is checked. On the right is the 'Main' tab with the '[Manager Info]' section. The 'Inactive' checkbox is checked. The 'Manager' dropdown is set to 'Shipping Manager'. The 'Short Name' text box contains 'Shipping'. The 'Full Name/Desc' text box contains 'Shipping'. At the bottom right are 'Add New' and 'Save' buttons. A mouse cursor is pointing at the 'Save' button.

Inactive	Short Name
☐	Anissa
☐	Fixed
☐	FwdSchMgr
☐	Ortho
☐	Removable
☒	Shipping

[Manager Info]

☒ Inactive

Manager
Shipping Manager

Short Name
Shipping

Full Name/Desc
Shipping

Add New Save

NOTE: Once a manager is inactive, they will no longer be available to select when printing Management Reports or areas in **Evolution** where you have the option to select a manager.