

Transfer Management User Manual v1.2

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Contents

ntroduction to Transfer Management		2
	L. Employee raises a transfer request	
2.		
3.		
4.		
5.	5. Pending Checklist approval	
6.	5. Pending HR approval	9
7.	7. Admin	11
8.	3. Search and Filter options	13



Introduction to Transfer Management

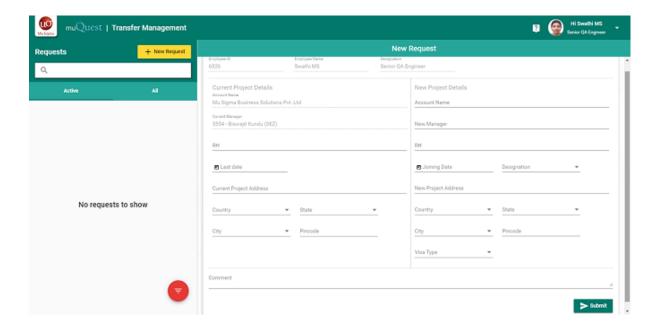
Transfer Management is designed to bring in the process or system in place to capture current transfers happening in the organization. This will also help in making the transfer process smoother and in a very structured manner.

The process is pretty simple and easy to understand .Employee raises a transfer request mentioning the current and future project details and submits it for further approvals .Approvals would be required from the Current Manager , New Manager(optional) , Immigration team , Checklist team and HR.Once the request is approved by HR , transfer process will be completed.

Workflow

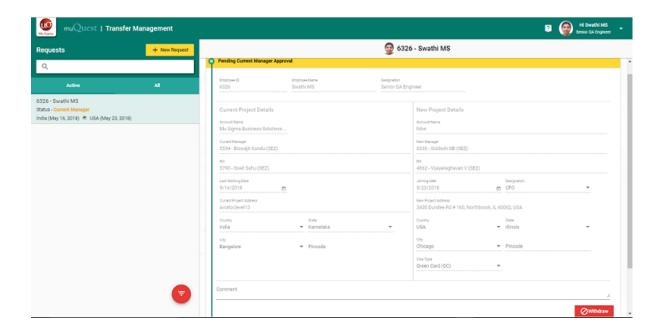
1. Employee raises a transfer request

• Employee logs into the Transfer Management application. Employee fills the Current Project and New Project details. On click of submit, the request is sent for Current Manager approval.



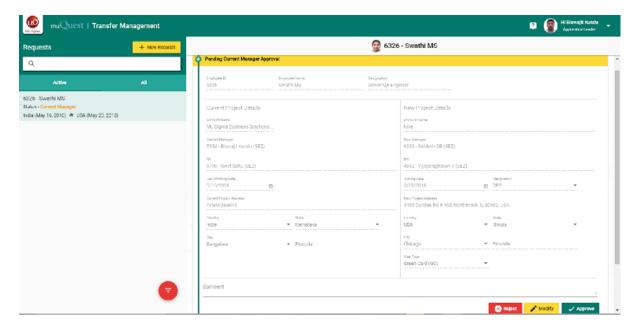


• Employee will be able to **Withdraw** the request until the request has pending approval from Current Manager and New Manager. Only HR will be able to approve or reject the withdrawal request by providing the comment for the same.



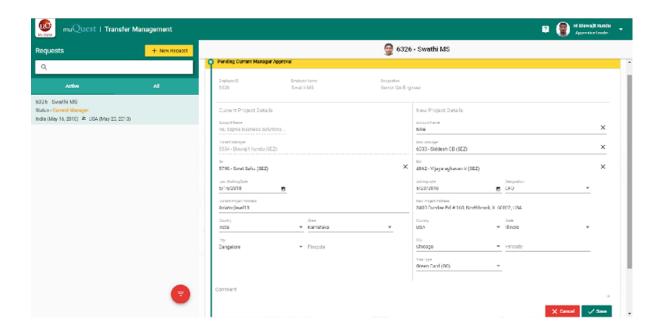
2. Pending Current Manager approval

- Current Manager will be able to view the Transfer requests which he is a part of and actions that he can take would be Approve /Modify /Reject.
- On approving the request, the request will require next level (New Manager or Immigration) approval.

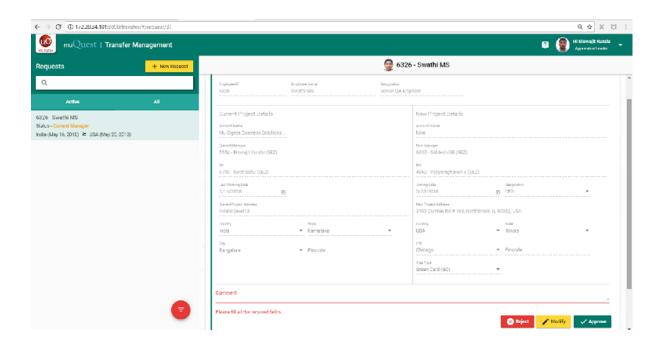




• Current Manager can modify Current project and New project details as well.



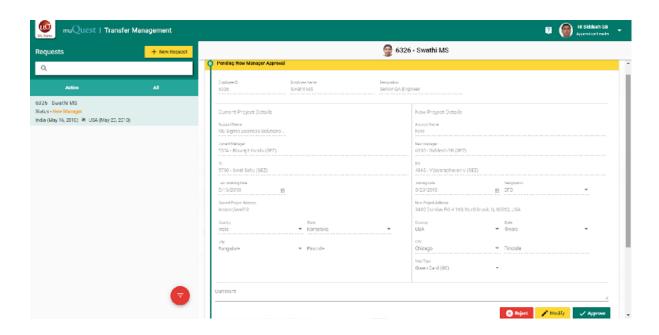
• Current Manager can reject the transfer request by providing suitable comment and transfer request will be rejected.



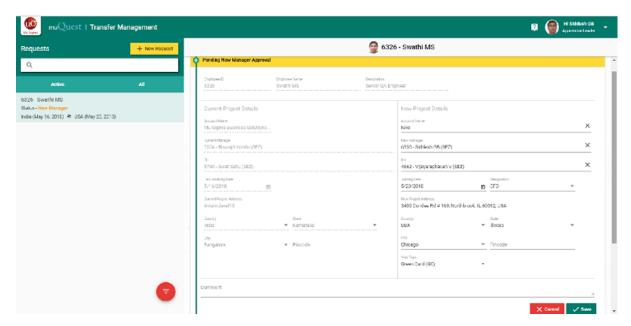


3. Pending New Manager approval

- New Manager approval is not always mandatory. While raising the request if New Manager detail is mentioned, only then approval would be needed.
- New Manager will be able to view Transfer requests and actions that can be taken would be Approve /Modify /Reject.
- On approving the request, the request will require Immigration team approval.

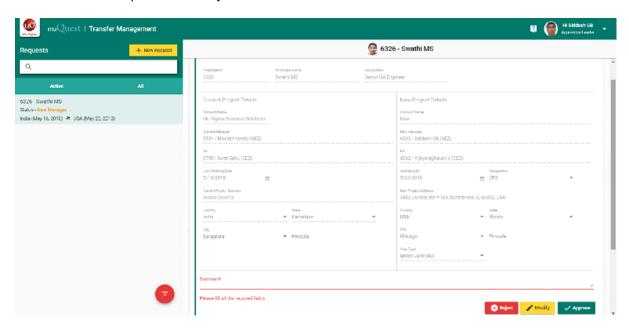


 New Manager will be able to modify only the new project details. On any modification, the comment has to be provided mandatorily.



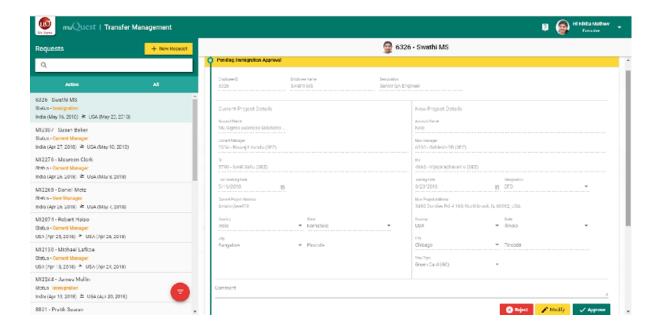


 New Manager can reject the transfer request by providing suitable comment and transfer request will be rejected.



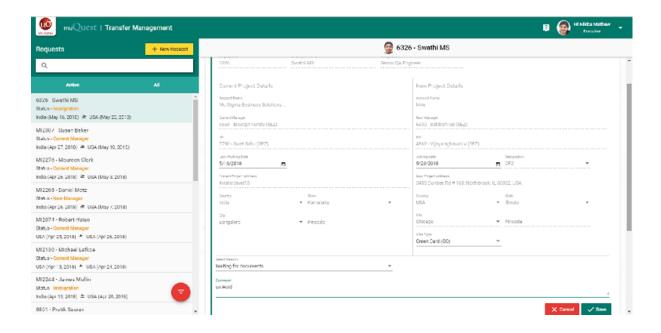
4. Pending Immigration approval

- Immigration will be able to view Transfer requests and actions that can be taken will be Approve /Modify /Reject.
- On approving the request, the request will require Checklist approval.

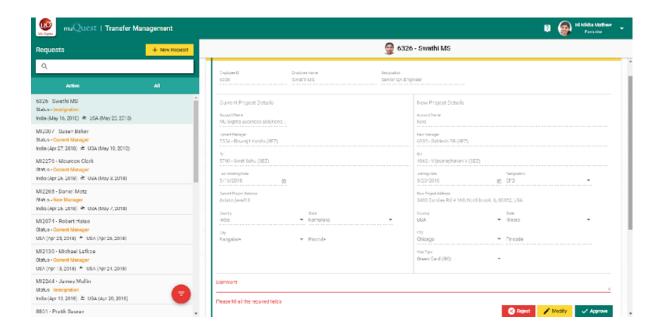




• Immigration will be able to modify the fields – Visa type, Last Working Date and Joining Date. On any modification, the reason should be selected from the dropdown and comment should be provided mandatorily.



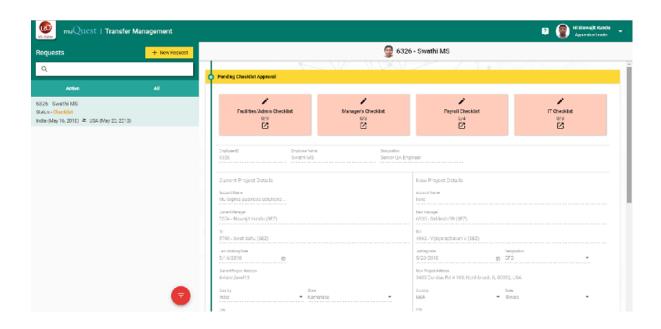
• Immigration can reject the transfer request by providing suitable comment and transfer request will be rejected.



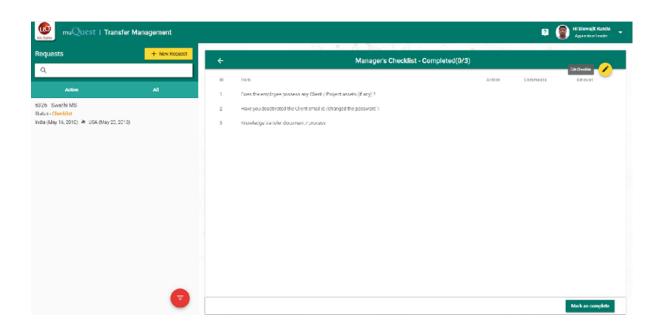


5. Pending Checklist approval

• Checklist approval would require approvals from different checklist teams depending upon the transfer request.

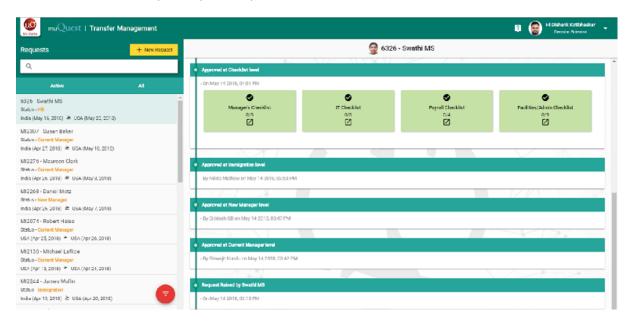


• Checklist could also be edited and then marked complete whenever required.



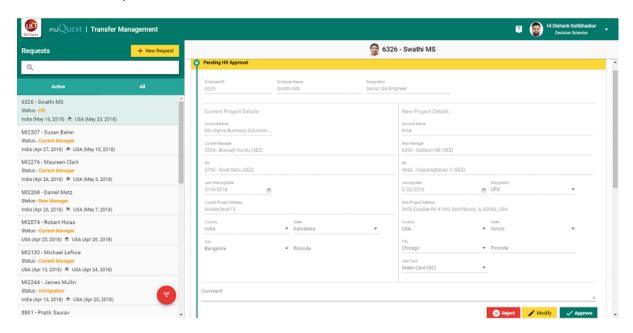


 Checklist approval gets completed only after mentioned checklist approvals are marked as complete by the respective teams.



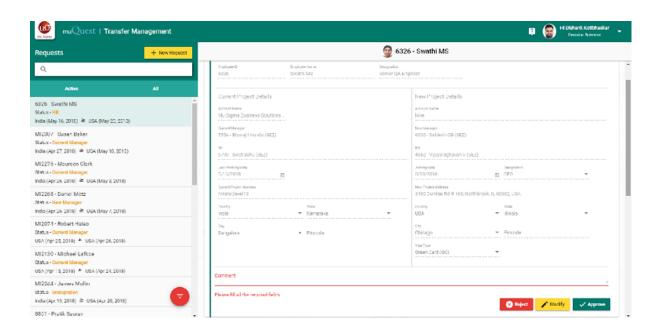
6. Pending HR approval

- HR approval is the final approval for the transfer request process to get completed.
- HR will be able to view all Transfer requests and actions that can be taken will be Approve /Modify /Reject.
- On approving the request, the transfer request gets final approval and process is now completed.

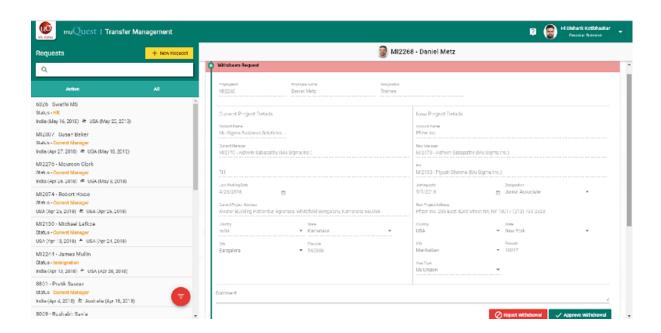




• HR can reject the transfer request and comment should be provided mandatorily.



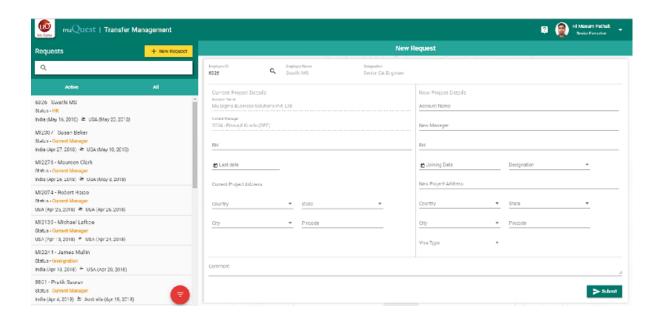
• HR can either Approve or Reject Withdrawal request by providing suitable comment.



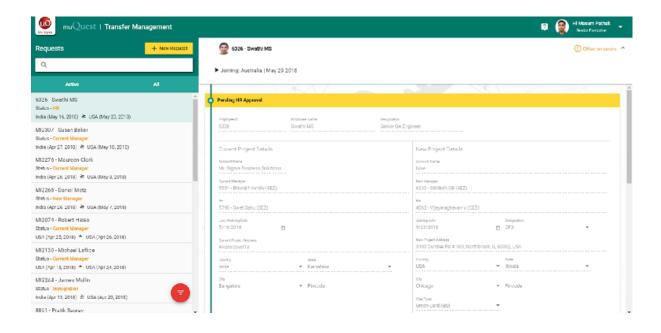


7. Admin

• Admin can raise a Transfer request on behalf of an employee.

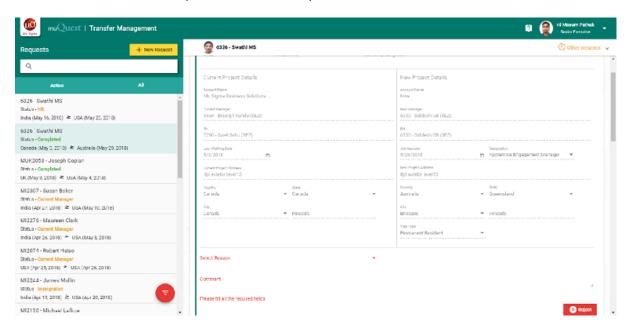


• Admin can also view **Other transfer requests** for an employee while taking an action on the transfer request.

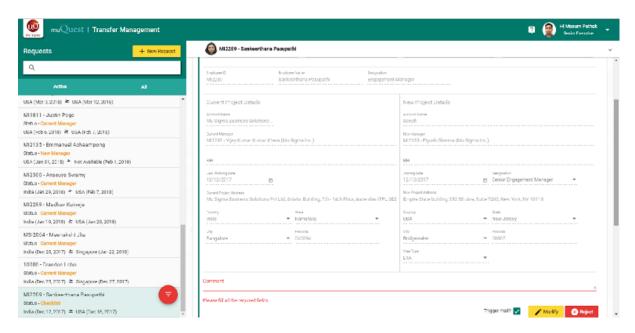




• Admin can also reject a completed request if required which will be considered as an Invalid Request. Admin should select the reason from the dropdown and comment should be provided mandatorily.



- Admin can modify the transfer request details at any level and all the details are editable.
- Only Admin can reject the transfer request when it is at Pending Checklist Approval level.

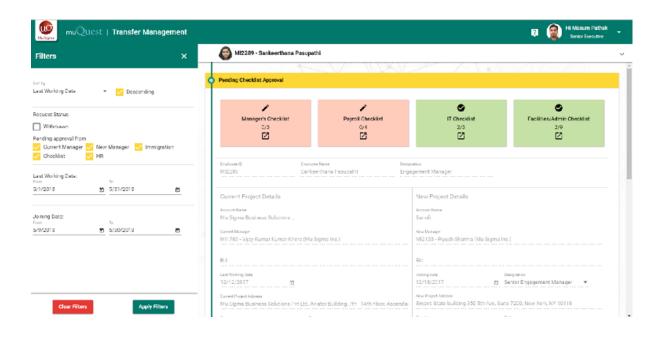


 Admin has the option to select whether mail trigger should happen at any level for any action.



8. Search and Filter options

• Transfer requests can be filtered based on transfer request status, last working date, joining date.



• Search option could be based on employee id and employee name.

