

## GL.010.023 – UPDATING DEPARTMENT MANAGER ID

<b>Purpose</b>	To update the Department Manager ID for Simple Journal approval workflow routing.
<b>Description</b>	<p>Simple Journals use the Manager ID found on the Department ChartField Value page for approval workflow routing.</p> <p>As Department Managers resign or leave institutions, maintenance to the record must exist for proper approval routings and notifications for Simple Journal transactions to be initiated.</p>
<b>Security Role</b>	BOR_GL_CHARTFIELDS
<b>Assumptions</b>	None
<b>Dependencies/ Constraints</b>	None
<b>Additional Information</b>	<ul style="list-style-type: none"> <li>• Email and Worklist notifications drive off the Department Manager ID and Project Manager ID in their respective ChartFields.</li> <li>• A similar task is necessary if a Project ID is used on the Project ChartField. For more information, see GL.010.024 - Updating Project Manager ID.</li> </ul>

## Procedure

Below are step by step instructions on how to update a Department Manager ID.

Step	Action
1.	Click the <b>NavBar</b> icon.
2.	Click the <b>Menu</b> icon.
3.	Click the <b>Set Up Financials/Supply Chain</b> link.
4.	Click the <b>Common Definitions</b> link.
5.	Click the <b>Design ChartFields</b> link.
6.	Click the <b>Define Values</b> link.
7.	Click the <b>Define ChartField Value</b> link.
8.	Click the <b>Department</b> link.
9.	Enter the Department in the <b>Department</b> field.
10.	Click the <b>Search</b> button.
11.	Verify the department status is <b>Active</b> to update Department Manager ID's for an active department only.
12.	Click the <b>Correct History</b> button.
13.	Enter or search for the Department Manager in the <b>Manager</b> field.  <i><b>Note:</b> to search for a Department Manager, click the magnifying glass icon. The Look Up Manager window appears to enter a Department Manager name and select from the search results.</i>
14.	Verify the <b>Manager</b> field populates with the <b>User ID</b> of the new Department Manager. The Manager Name field populates upon tabbing out of the Manager field or saving this record.
15.	Click the <b>Save</b> button.