

GL.010.024 - UPDATING PROJECT MANAGER ID

Purpose	To update a Project Manager for Simple Journal approval workflow routing.
Description	<p>Simple Journals use the Manager found on the Project ChartField Value page for approval workflow routing.</p> <p>As Project Managers are reassigned or leave the institutions, maintenance to the record must exist for proper approval routings and notifications for Simple Journal transactions to be initiated.</p>
Security Role	BOR_GL_CHARTFIELDS_PRJ
Assumptions	None
Dependencies/ Constraints	None
Additional Information	<ul style="list-style-type: none"> • Email and Worklist notifications drive off the Department Manager ID and Project Manager ID in their respective ChartFields. • A similar task is necessary if a Department ID is used on the Department ChartField. For more information, see GL.010.023 - Updating Department Manager ID.

Procedure

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

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