

## EP.010.080 - UPDATING PROJECT MANAGER ID

<b>Purpose</b>	To update a Project Manager for eProcurement Requisition approval workflow routing.
<b>Description</b>	<p>eProcurement Requisitions 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 eProcurement transactions to be initiated.</p>
<b>Security Role</b>	<b>BOR_GL_CHARTFIELDS</b>
<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 Department ID is used on the Department ChartField. For more information, see <a href="#">EP.010.070 - Updating Department Manager ID</a>.</li> </ul>

## Procedure

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

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>ChartField Values</b> link.
8.	Click the <b>Project</b> link.
9.	Enter the Project into the <b>Project</b> field.
10.	Click the <b>Search</b> button.
11.	Verify the project status is <b>Active</b> to update Project Manager ID's for an active project only.
12.	Click the <b>Correct History</b> button.
13.	Enter or search for the Project Manager in the <b>Manager</b> field.  <i><b>Note:</b> 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 <b>Manager</b> field populates with the <b>User ID</b> of the new Project Manager. The Manager Name field populates upon tabbing out of the Manager field or saving this record.
15.	Click the <b>Save</b> button.