GEORGIA*FIRST*
FINANCIAL, INFORMATION & REPORTING SYSTEMS FOR TOMORROW
University System of Georgia • Information Technology Services

PeopleSoft 9.2

# GL.010.022 – ADDING/UPDATING ADDITIONAL PROJECT APPROVER

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|---|---|
| **Purpose** | To add/update an additional Project Approver. |
| **Description** | The Project Approver page can be used to specify new approvers. The users specified on this page must also have the appropriate security roles to approve the Simple Journal.<br><br>By default, the project approval workflow routes to only one project manager which is defined on the Project ChartField Values page. If the institution wishes to have multiple project approvers, use the Project Approver page. |
| **Security Role** | BOR_GL_CHARTFIELDS_PRJ |
| **Assumptions** | Project exists in PeopleSoft. |
| **Dependencies/ Constraints** | Additional Project Approvers must have their security roles and user preferences assigned before they are able to take approval action. |
| **Additional Information** | Before using this page for the first time, submit an ITS Helpdesk ticket to make a change to the institution's workflow configuration. |

## Procedure

Below are step-by-step instructions on how to add/update additional Project Approver.

| 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 **Project Approver** link. |
| 8. | Enter the SetID in the **SetID** field. |
| 9. | Click the **Search** button. |
| 10. | Select one of the following options from the list below:<br><br>• To add a Project Approver for the first time, see Step 11.<br>• To add a new Approver to an existing project, see Step 12.<br>• To update an existing Approver, see Step 13.<br>• To remove an existing Approver, see Step 14. |
| 11. | To add a Project Approver for the first time, click the **Add a New Value** button, enter the institution's SetID, and click the **Add** button.<br><br>Proceed to Step 12. |
| 12. | To add a new Approver for an existing project, click the plus **(+)** icon to add a new row and enter the following:<br><br>• Project<br>• Approver ID<br><br>*Note*: the Approver column should populate based on the information entered in Approver ID field.<br><br>Proceed to Step 15. |
| 13. | To update an existing Approver, locate the appropriate project row.  Then, click in the Approver ID field and enter the new Approver ID.<br><br>Proceed to Step 15. |

| Step | Action |
|------|--------|
| 14. | To remove an existing Approver, select the minus **(-)** icon next to the appropriate Approver ID. |
| 15. | Click the **Save** button. |