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

PeopleSoft 9.2

GL.010.024 - UPDATING PROJECT MANAGER ID

Purpose	To update a Project Manager for Simple Journal approval workflow routing.
Description	Simple Journals use the Manager found on the Project ChartField Value page for approval workflow routing. 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.
Security Role	BOR_GL_CHARTFIELDS_PRJ
Assumptions	None
Dependencies/ Constraints	None
Additional Information	• 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. ***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.*
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.