

EP.010.081 – ADDING/UPDATING ADDITIONAL PROJECT APPROVER

Purpose	To add/update an additional Project Approver.
Description	<p>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 requisition.</p> <p>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.</p>
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 Navigator icon.
3.	Click the Set Up Financials/Supply Chain link.
4.	Select the Common Definitions link.
5.	Select the Design ChartFields link.
6.	Select the Define Values link.
7.	Select the Project Approver link.
8.	Select one of the following options from the list below: <ul style="list-style-type: none"> • To add an additional Project Approver for the first time, proceed to Step 9. • To add another Project Approver to an existing project, proceed to Step 10. • To update an existing Approver, proceed to Step 16. • To remove an existing Approver, proceed to Step 21.
9.	To add a Project Approver for the first time: <ul style="list-style-type: none"> • Select the Add a New value tab. • Enter the institution's Business Unit. • Enter the Project ID. • Click the Add button. <p>Proceed to Step 14.</p>
10.	Enter the Business Unit in the Business Unit field.
11.	Enter or search for the Project ID in the Project ID field.
12.	Click the Search button.
13.	Select the Project ID to change from the search results. The system navigates to the Project Approver page.
14.	Click the plus (+) sign to add a row.

Step	Action
15.	Enter the Approver ID in the Approver ID field. <i>Note: the Approver column should populate based on the information entered in Approver ID field.</i> Proceed to Step 26.
16.	Enter the Business Unit in the Business Unit field.
17.	Enter or search for the Project ID in the Project ID field.
18.	Click the Search button.
19.	Select the Project ID to change from the search results. The system navigates to the Project Approver page.
20.	To update an existing Approver, locate the appropriate project row. Then, click in the Approver ID field and enter the new Approver ID. Proceed to Step 26.
21.	Enter the Business Unit in the Business Unit field.
22.	Enter or Search for the Project ID in the Project ID field.
23.	Click the Search button.
24.	Select the Project ID to change from the search results.
25.	To remove an existing Approver, select the minus (-) icon next to the appropriate Approver ID.
26.	Select the Save button.