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

PeopleSoft 9.2

# AP.080.040 – UPDATING DEPARTMENT MANAGER ID

| | |
|---|---|
| **Purpose** | To update the Department Manager ID for approval workflow routing. |
| **Description** | Use the Manager ID found on the Department ChartField Value page for approval workflow routing.<br><br>As Department Managers resign or leave institutions, maintenance to the record must exist for proper approval routings and notifications for transactions to be initiated. |
| **Security Role** | **BOR_GL_CHARTFIELDS** |
| **Dependencies/ Constraints** | None |
| **Additional Information** | • Email and Worklist notifications drive off the Department Manager ID and Project Manager ID in their respective ChartFields.<br><br>• A similar task is necessary if a Project ID is used on the Project ChartField. For more information, see AP.080.042 - Updating Project Manager ID. |

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## Procedure

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

| Step | Action |
|------|--------|
| 1. | Click the **NavBar** icon. |
| 2. | Click the **Menu** 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 **ChartField Values** link. |
| 8. | Select the **Department** link. |
| 9. | Enter the SetID in the **SetID** field. |
| 10. | Enter the department in the **Department** field. |
| 11. | Select the **Search** button. |
| 12. | Verify the status is **Active** to update Department Manager ID's for an active project only. |
| 13. | Click the **Correct History** button. |
| 14. | Enter or search for the Department Manager in the **Manager ID** field.<br><br>***Note***: *To search for a Department Manager, click the magnifying glass icon. The Look Up Manager ID window appears. Users can search by Empl ID or Name.* |
| 15. | Verify the Manager ID field populates with the **User ID** of the new Department Manager. |
| 16. | Select the **Save** button. |