Update Project Manager

Purpose: Use this document as a reference for updating or inactivating a PI or Project Manager to a Project in ctcLink.

Audience: College staff responsible for creating and managing projects.

⊘ You must have at least one of these local college managed security roles:

- ZZ PC Local Configuration
- ZZ Project Costing Processing

  You must also set these User Preference Definitions:

- FSCM 9.2 - Grants Security

  If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.
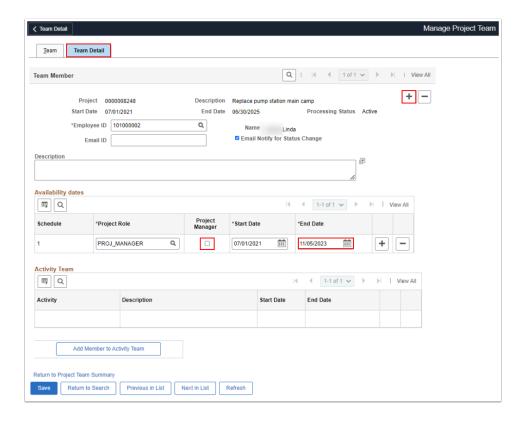
Update Project Manager

Navigation: Project Costing > Project Definitions > Manage Project Team

1. The **Team** search page displays.
2. Enter your **Business Unit** (if it doesn't default).
3. Enter the **Project** that needs the Manager change.
4. Select the **Search** button.
5. The **Team** page displays. Select the **Team Detail** tab.
7. The **Team Detail** page displays. To inactivate the existing PI, 'deselect' the Project Manager checkbox and update the *End Date.
8. Select the **plus icon [+]** to add a new team member.

⚠ When inactivating a PI or Project Manager of a Project, be sure not to overlap the **Start Date** or **End Date.**
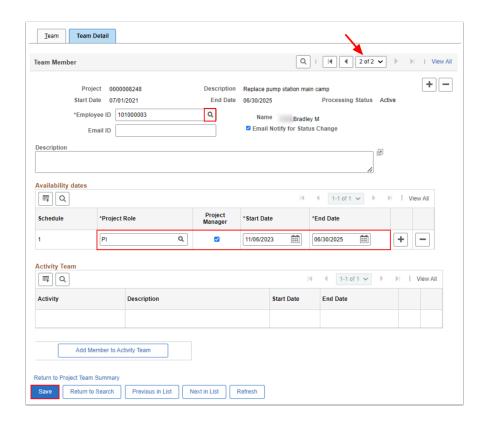
9. A new Team Member row is added.
10. In the **Employee ID** field, enter or lookup the Employee ID for the new Principal Investigator/ Proj_Manager.
11. In the Availability dates section, update the schedule information:
    a. In the **Project Role** field, lookup the role value.
    b. Select the **Project Manager** checkbox.
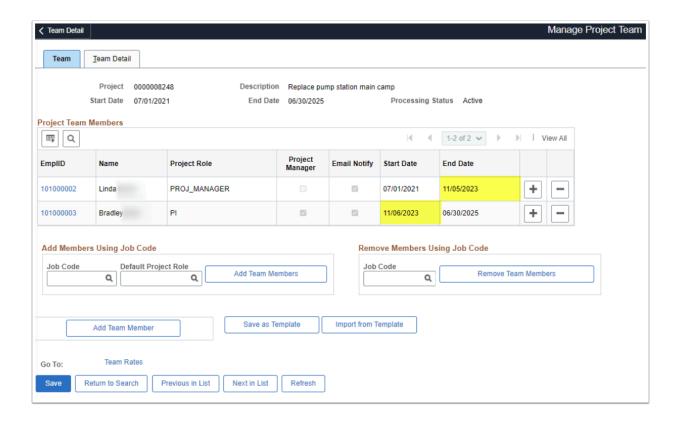   c. Update the **Start Date** and **End Date** as needed.

12. Select the **Save** button.

Select the **Team** tab to review or verify changes. Use the **View 1 / View All** links to view all Team Members.

13. Process complete.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video. *coming soon!*

Video Tutorial Via Panopto

View the external link to Update Project Manager. This link will open in a new tab/window. - *coming soon!*