

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**.

Team Detail

Manage Project Team

Team

Team Detail

Team Member

Project

000008248

Description

Replace pump station main camp

Start Date

07/01/2021

End Date

06/30/2025

Processing Status

Active

*Employee ID

101000002

Name

Linda

Email ID

Email Notify for Status Change

☒

Description

Availability dates

Schedule	*Project Role	Project Manager	*Start Date	*End Date		
1	PROJ_MANAGER	<input type="checkbox"/>	07/01/2021	11/05/2023	+	-

Activity Team

Activity	Description	Start Date	End Date		

Add Member to Activity Team

Return to Project Team Summary

Save

Return to Search

Previous in List

Next in List

Refresh

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.

Team

Team Detail

Team Member

Q

2 of 2

View All

Project

000008248

Description

Replace pump station main camp

+

-

Start Date

07/01/2021

End Date

06/30/2025

Processing Status

Active

*Employee ID

101000003

Q

Name

Bradley M

☒ Email Notify for Status Change

Email ID

Description

Availability dates

Q

1-1 of 1

View All

Schedule	*Project Role	Project Manager	*Start Date	*End Date		
1	PI	<input checked="" type="checkbox"/>	11/06/2023	06/30/2025	+	-

Activity Team

Q

1-1 of 1

View All

Activity	Description	Start Date	End Date		

Add Member to Activity Team

Return to Project Team Summary

Save

Return to Search

Previous in List

Next in List

Refresh

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

Team Detail

Manage Project Team

Team

Team Detail

Project

000008248

Description

Replace pump station main camp

+

-

Start Date

07/01/2021

End Date

06/30/2025

Processing Status

Active

Project Team Members

Q

1-2 of 2

View All

EmplID	Name	Project Role	Project Manager	Email Notify	Start Date	End Date		
101000002	Linda	PROJ_MANAGER	<input type="checkbox"/>	<input checked="" type="checkbox"/>	07/01/2021	11/05/2023	+	-
101000003	Bradley	PI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	11/06/2023	06/30/2025	+	-

Add Members Using Job Code

Job Code

Q

Default Project Role

Q

Add Team Members

Remove Members Using Job Code

Job Code

Q

Remove Team Members

Add Team Member

Save as Template

Import from Template

Go To:

Team Rates

Save

Return to Search

Previous in List

Next in List

Refresh

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!*