Dept Assigned Manager
Background

- Enterprise Analytics (EA) provides departments with considerable access to financial data and data attributes in a single EA template.
- With the advent of EA, departments have expressed a need to sort, group, and filter their financial data by Project Manager.
- Projects for grants and contracts always have a Project Manager designated by the Office of Sponsored Programs; however, many other types of projects have no Project Manager assigned in PeopleSoft.
- If the Project Manager field in EA is blank, it makes the field problematic for sorting, grouping and filtering.
The Dept Assigned Manager page was developed to provide departments with a way to assign a Project Manager for display in Enterprise Analytics templates (and any reports that they generate from EA templates).

You should think of the Dept Assigned Manager as an **EA reporting attribute** of the Project ID.

Use of the Dept Assigned Manager page is entirely **optional**.
Access to Dept Assigned Manager

- Only the department’s **ACE** has access to the Dept Assigned Manager page.
- **Navigation:** HSC Custom Components > Security > Dept Assigned Manager
Access is Tied to ACE Security

- An ACE can update the manager for Project IDs belonging to any department for which the ACE has authority. (See slide 7 for exceptions.)
- When the search page loads, the ACE begins by clicking the **Search** button.
Selecting a Department

- After clicking , the ACE’s authorized departments display.
- The ACE then clicks on a Dept ID to retrieve all active projects belonging to the selected department.
Some Manager IDs are Read-Only

- The ACE cannot update the manager for Grants and Contracts, or for Endowments. These rows will appear read-only. Those PIDs which the ACE can update will have a magnifying glass button.
Searching for a Manager

- To find a manager by name, enter a last name and then click the **Look Up** button.
- Select a name from the search results.

_TIP:_ If the search by Last Name results in too many results, use the Name field to pare down the results. Enter the employee's first name (or a portion of it) and change begins with to contains.
Viewing the Update in PeopleSoft

- Based on your selection, the employee’s ID and name populate the page.
- Save the page to preserve the update.

TIP: You can use the Windows shortcut key combination CTRL+C to copy an employee ID, and then use CTRL+V to paste it into the Manager ID field for another project(s).
To view the manager changes in EA, you need to add the **PID Manager Name** from the PivotTable Fields.

Updates made on the Dept Assigned Manager page will appear in your EA template the **following day**.
Example 1: Report Filter

When you add the **PID Manager Name** as a report filter, you need to specify a name by clicking the filter button and supplying a name.
Example 2: Pivot Rows

**TIP:** When you add the PID Manager Name as a row value, make certain that you insert it above the PID field as shown. It will take about 30 seconds for the template to refresh. If you instead add the PID Manager Name below the PID, the template can take 5 or more minutes to complete the refresh.
Example 3: Drilldown

- If you double-click on an amount and drill down to the transactional details, the PID Manager Name will appear as a column in the output. You can then pivot the data by Manager name.
Effect on PeopleSoft Data

- It’s important to understand that assigning a manager on the Dept Assigned Manager page...
  - does not update the Project Manager anywhere else in PeopleSoft.
  - does not affect PeopleSoft security.
  - does not infer or grant any privileges or authority (such as signature authority).
- It is used solely for Enterprise Analytics reporting.
You Should Also Know…

- When you view the Dept Assigned Manager page for the first time, the names of former employees may appear for some projects.
  - These names come from the PeopleSoft project manager table as a default value.
  - These former employees are some of the first manager names that you will want to update.