

## PPM TASK: UPDATE PROJECT MANAGER

Use this task to update the Project Manager for a PPM Project

### NAVIGATION:

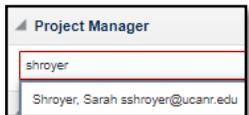
Oracle Home Page > Projects > Project Financial Management

Step	Action
1.	When you navigate to the <b>My Projects</b> page, search for the PPM Project
2.	Select <b>Show Filters</b> located to the right of the search box below <b>My Projects</b>
3.	Using one of the <b>search methods</b> below, locate the PPM Project

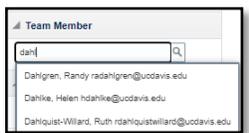
### SEARCHING TIPS:



If you know the project name or number, enter it in the **Project Name or Number** search box and select the magnifying glass to search. You can search partial names for a list of possible projects: Example: Type **4H** for all projects with 4H in the name. Select the correct project and the results will appear.



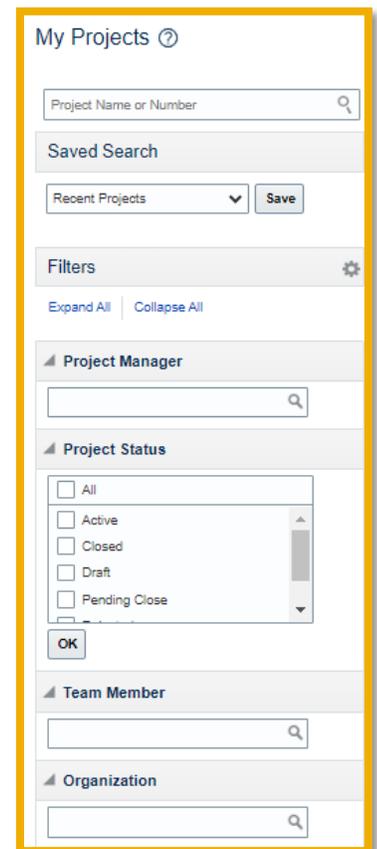
If you know the project manager name, type the **last name** in the **Project Manager Search Box** and select the magnifying glass to search. Select the correct name.



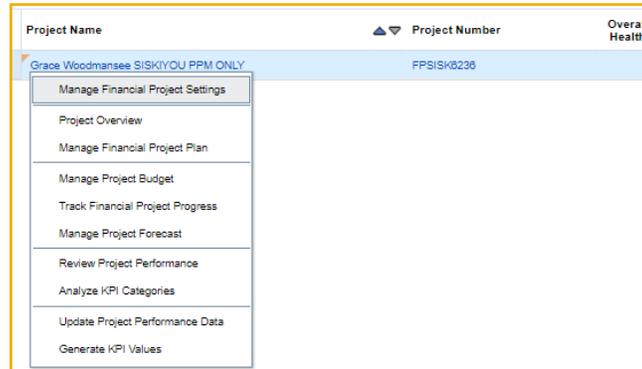
If you know the name of the PI, type the **last name** in the **Team Member Search Box** and select the magnifying glass to search. Select the correct name. As you type the name, options appear. Select the correct name.



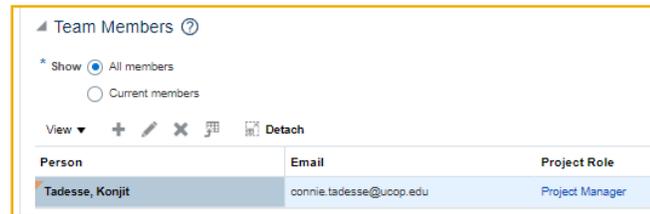
If you know the financial owning organization for the project, type the Financial Department (ANR begins 99). Select the correct organization and the results will appear.



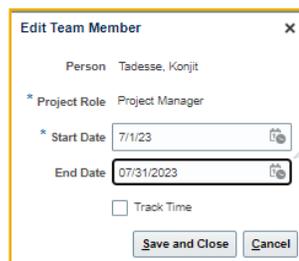
Step	Action
4.	Click on the <b>Project Name</b> or <b>Project Number</b> to reveal the action menu.
5.	Select <b>Manage Financial Project Settings</b> located at top of the action menu.



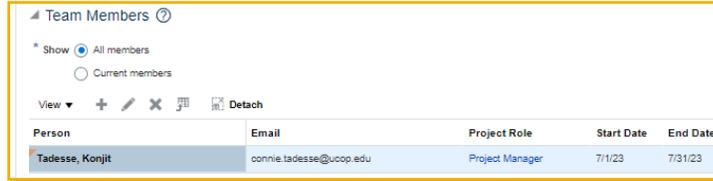
Step	Action
6.	Click on the <b>Parties</b> tab to reveal the Team Members panel.
7.	Next to <b>*Show</b> , Select the radial button <b>All Members</b> to view past and future assignments.



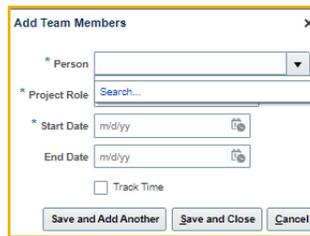
Step	Action
8.	Select the <b>Pencil Icon</b>  to edit the current <b>Project Manager</b> assignment.
9.	In the pop-up menu, complete the <b>End Date</b> for the current Project Manager. Note: Enter a four-digit year for the data to record correctly (07/31/2023)



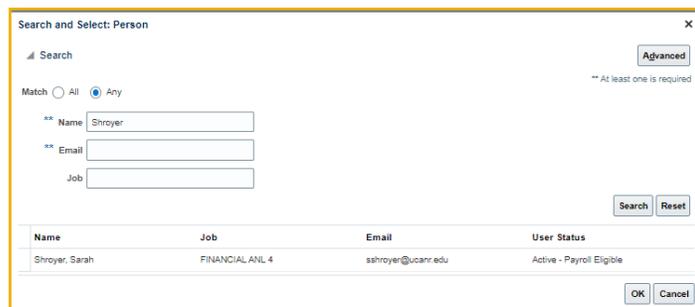
Step	Action
10.	Select <b>Save and Close</b> to record the change. The Team Member's role <b>End Date</b> will be updated to reflect the change.



Step	Action
11.	Add a new Project Manager by selecting the <b>Plus Icon</b>  to open the pop-up menu.
12.	Select the <b>Down Arrow</b> next to the <b>Person</b> field to reveal <b>Search</b> .



Step	Action
13.	Select <b>Search</b> to reveal the search menu and enter the search criteria in the fields <b>Name</b> or <b>Email Address</b> . When searching by the <b>Name</b> field choose one of the following: With the <b>Match All</b> radial button selected, enter <b>Last Name</b> as search criteria. With the <b>Match Any</b> radial button selected, use <b>Last Name</b> or portion of the name as the search criteria.
14.	Select <b>Search</b>  Note: If you need more options to find the person select <b>Advanced</b> to allow options <b>Starts With, Contains, Equals, Between, etc.</b>



Step	Action
15.	Select the <b>Row</b> with correct person listed and select <b>OK</b> to accept.

Name	Job	Email	User Status
Shroyer, Sarah	FINANCIAL ANL 4	sshroyer@ucanr.edu	Active - Payroll Eligible

OK Cancel

Step	Action
16.	The <b>name</b> of the Team Member has been added to the <b>Person</b> field.
17.	Select the down arrow next to the <b>Project Role</b> field to reveal the list of roles. Note: Aggie Enterprise uses only the Project Manager and Principal Investigator roles.
18.	Select <b>Project Manager</b> to populate the field.

Step	Action
19.	Type the <b>Start Date</b> for the person to begin the role of Project Manager. Enter a <b>start date</b> that begins after the end date of the prior project manager. There cannot be two people assigned as project manager at the same time. When entering the date, use a four-digit year (08/01/2023). Select <b>Save and Close</b>

Step	Action
20.	The change in Project Manager is reflected in the <b>Team Members</b> panel. Note: If you only see the current Project Manager, Select the <b>*Show All Members</b> radial button to see past, current and future Team Members.
21.	Select <b>Done</b> to close <b>Manage Financial Project Settings</b> . <b>End of Procedure.</b>

General **Parties** Planning Financial Reporting Additional Information Cost Rate Overrides

Team Members ?

\* Show  All members  
 Current members

View **Detach**

Person	Email	Project Role	Start Date	End Date
Tadesse, Konjit	oonnie.tadesse@ucop.edu	Project Manager	7/1/23	7/31/23
Shroyer, Sarah	sshroyer@ucanr.edu	Project Manager	8/1/23	