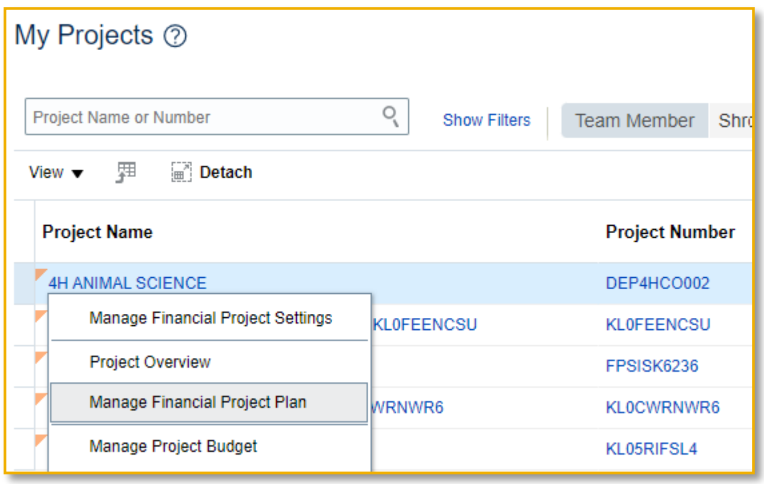
PPM TASK: CREATE AND EDIT TASKS

Use this help guide to create and edit Tasks for a PPM Project

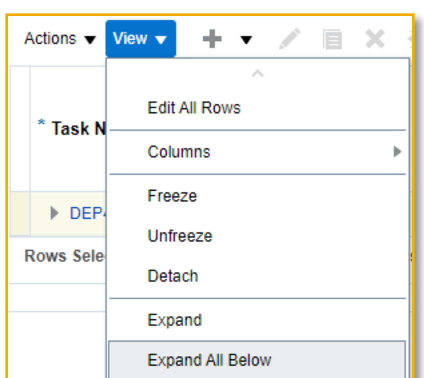
NAVIGATION:

Oracle Home Page > Projects > Project Financial Management

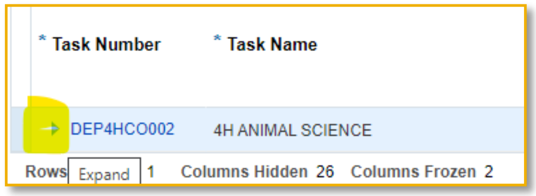
Step	Action
1.	When you navigate to the **My Projects** page, search for the PPM Project.
2.	Click on the **Project Name** or **Project Number** to reveal the action menu.
3.	Select **Manage Financial Project Plan** located in the action menu.



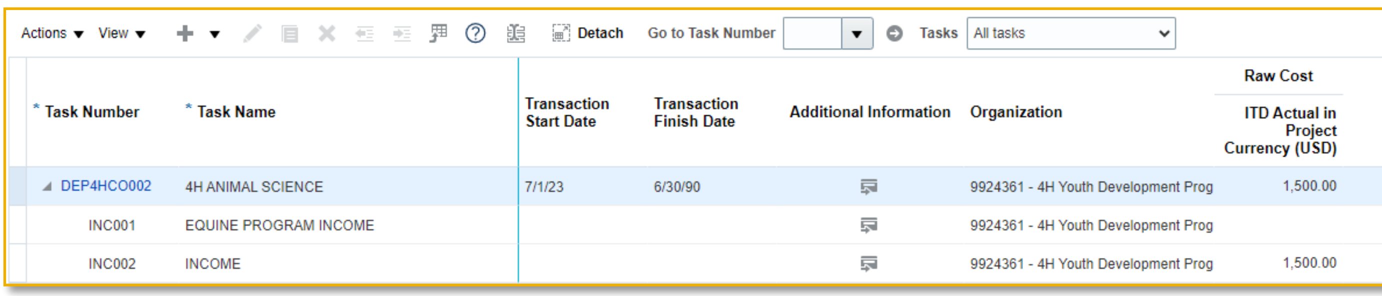
Step	Action
4.	Click on **View** to reveal the viewing options panel.
5.	Select to **Expand All Below** to view all tasks in the current project.



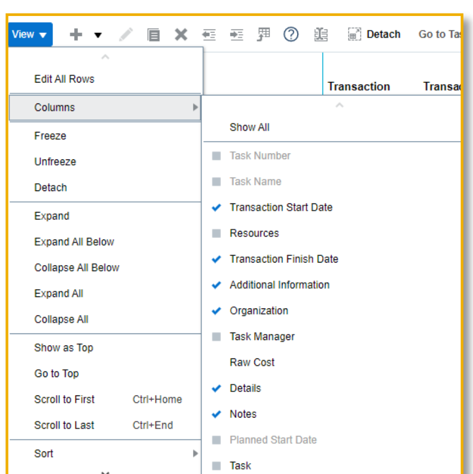
Step	Action
6.	As an option, the **Carrot Icon** next to the **Project Number** can be selected to reveal or collapse all Tasks.

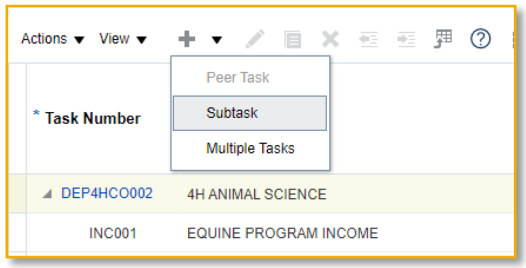
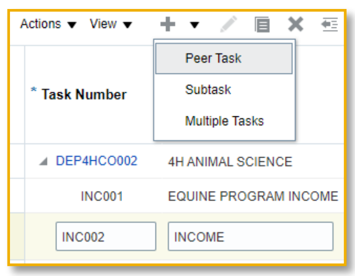
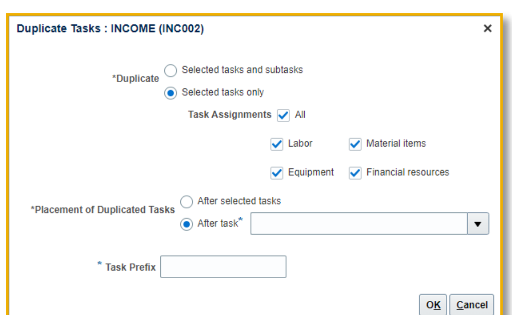


Step	Action
7.	All project task values should now be seen in the Project Task panel.



Step	Action
8.	Make sure the following columns are visible in the **Task Panel: Transaction Start Date**, **Transaction Finish Date**, **Additional Information**, **Raw Cost – ITD Actual in Project Currency**.
9.	To add columns; select **View**, **Columns**, and select the columns that are missing.

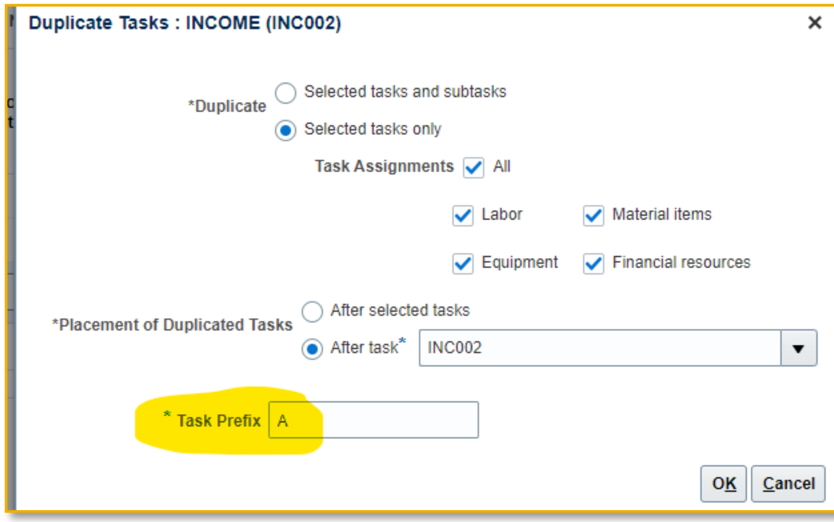


<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10.</td><td>Determine the location in the list of Tasks where you would like the new task to appear. Select the Task Row above the location.</td></tr>
<tr><td>A.</td><td>To add a new task at the <u>top of the</u> Task List, select the Department Project Row so it is highlighted. Select the Plus Icon to open the pop-up menu. Select the Subtask and the new task appears at the top of the Task List.

</td></tr>
<tr><td>B.</td><td>To add a new task <u>below</u> an existing Task, select the Task Row above the location where you would like the new task to appear. Select the Plus Icon to open the pop-up menu. Select Peer Task to add a new task below the selected Task row.

</td></tr>
<tr><td>C.</td><td>A task can also be added by selecting a Task row you would like to duplicate and selecting the Duplicate Tasks Icon A sub menu appears. Select the radial button for Selected Tasks Only next to *Duplicate. Select the radial button After Task to assign the placement of the row next to *Placement of Duplicated Tasks.

</td></tr>
</table>

C.

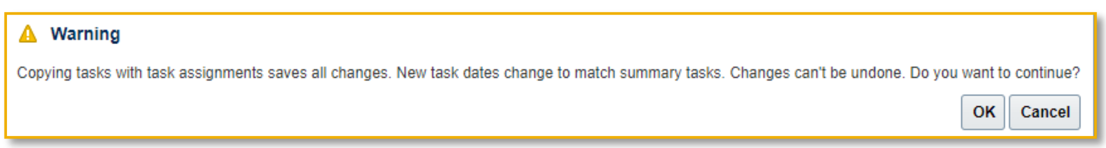
Select the **drop-down menu** next to the **After Task*** radial button and select the assigned order for the duplicated task.

Assign a **Task Prefix** in the ***Task Prefix** box.
Note: Assign a task prefix on a duplicated row to differentiate it from the original row. This will add an additional character to the Task Number which will need to be changed.

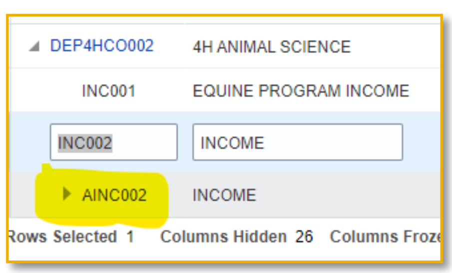


Select **OK.**

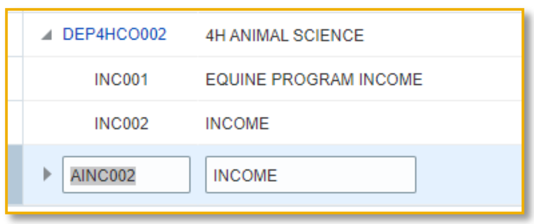
A warning message will appear. Select **OK.**



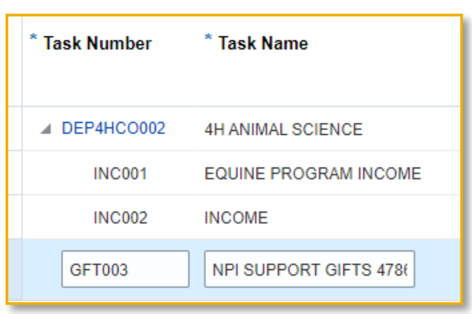
The Task is duplicated with the prefix added to the **Task Number.**



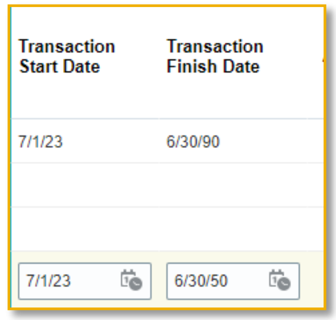
Step	Action
11.	A new task has been created either by adding or duplicating an existing task. The next step is to **edit** (if duplicated) **or type the Task Number** and **Task Name** (if more explanation is required).
12.	**Moving Tasks** – You can move a task into another position by selecting the row of the task and then selecting **Actions** drop down menu. Select **Manage Tasks**, then Move Tasks and **SubTasks.** In the **Destination Task** drop down select the row you want the task to follow and select **OK.** The task is moved**.**
13.	**Edit the Task Number** by selecting the **Task Number** Field. The Number becomes editable.



Step	Action
14.	The Task Number must be 6 Alpha/Numeric characters. The alpha characters should be all capitalized. **Edit the Task Number** of the row.
15.	**Edit the Task Name** by selecting the Task Name field. There are 250+ characters available in the task name field. Note*: Do not use any characters other than alpha numeric.*



Step	Action
16.	Enter a **Transaction Start Date** and **Transaction Finish Date** for the Task. **Note:** Transactions will not post to the Task after the Transaction Finish Date. If a task should be closed at the end of the fiscal year, enter 6/30/XXXX (end of fiscal year). If the task will not close for a period of time, enter an ending year far out in the future such as 2050.



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17.	Select the **Additional Information Icon**  to open the sub menu. Additional Information is where the chartstring values that carry to the GL are located.
18.	Enter the correct chartstring values for **Program, Purpose, Fund and Activity**. You can type the value directly in the box and press tab to move to the next field. **Note:** To search for a value, select the down arrow to select the Search link and open up a search menu where you can perform a simple search or advanced search.
19.	Once the values are entered select **OK.** Select Save or Save and Close to complete the Task. End of Procedure.