PTA Setup Request

Overview of Changes from 11i to R12

IMSS
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PTA Setup Request

Overview of Changes from 11i to R12

As part of the IMSS Oracle R12 upgrade project, the PTA Setup Request has been redesigned. In addition to a different look and feel between the former version (11i) and the new version (R12) there are functionality.

Summary of Changes

- **Oracle Functionality Changes**
  - Oracle Navigation
  - Icons
  - Search for Values
  - Hierarchies

- **PTA Setup Request Functionality**
  - Project-Task and Award Setup Now Separate
  - General Changes
    - Order of Fields
    - Processing Area LOV
    - Auto-population of Administration Contact
    - Form Personalization
    - Setup Request Search Results
  - Linking
    - Searching
    - Copying
  - Adding Personnel
Oracle Functionality Changes

Navigation

In the 11i PTA Setup Request the user logs into access.caltech, goes into Oracle Applications, and chooses the responsibility OGM PTA Setup - CIT. The list of available system functions then appear to the right of the users Oracle responsibilities.

In the R12 PTA Setup Request the user continues to log into access.caltech, navigates into Oracle Applications, and chooses the new responsibility CIT – PTA Setup. Instead of the Responsibility’s functions appearing to the right, however, R12 has a hierarchical navigation in which the user drills down to the functions by expanding the responsibility.

Icons

The images used as icons for action have changed from 11i to R12. These changes impact all areas of Oracle Applications, and not just the PTA Setup Request.

<table>
<thead>
<tr>
<th>Icon Use</th>
<th>11i</th>
<th>R12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search for values</td>
<td>![11i Icon]</td>
<td>![R12 Icon]</td>
</tr>
<tr>
<td>Date search</td>
<td>![11i Icon]</td>
<td>![R12 Icon]</td>
</tr>
</tbody>
</table>
Tip about intended use of the form or field | N/A
---|---
Quick Select – reduces the number of clicks needed when choosing the value in a list of returned values | N/A
Create new record | N/A
Select to Edit record | N/A
Delete record | N/A
Expand hierarchy | N/A
Collapse hierarchy | N/A
Select focus, e.g., show only task 1.3 and its subtasks. | N/A
True | N/A
False | N/A

**Search for Values**

There are slight changes to the look and feel when searching for values for data entry from 11i to R12. In both 11i and R12 a pop-up window is activated when clicking on the Search for Values icon. In 11i the user enters the search criteria, a list of values is returned, and the user clicks on the value desired.
In R12 the user enters the search criteria, a list of values is returned, and the user can either 1) click on the radio button next to the value desired and then click on the Select button; or 2) click on the Quick Select icon.

**PLEASE NOTE:** Partial entries may be entered into form fields. When the user tabs out of the field, the application will automatically begin a search. If only a single item exists for the search it will default into the field. However, if the search has more than one item returned, the Search and Select pop-up window will open and display the possible values. If no value is returned, the Search and Select pop-up window will open and indicate that no items were found.

**TIP:** Be cautious when entering partial values in a field because doing so may begin a search that will return a large number of items and take a very long time to generate.

**Hierarchies**

As shown earlier in the Oracle Navigation changes, R12 incorporates the use of hierarchies. Specific to the PTA Setup Request, hierarchies are used for displaying the functions within the responsibility as well as the task structure in the Task Setup request.
PTA Setup Request Functionality

Separation of Project-Task Setup and Award Setup

If a user in 11i wanted to create more than one project linked to a single award a single PTA Setup Request would be submitted, and then the user had to wait until that PTA was created before the user could create requests for the additional projects. In R12, this is not longer the case and is the reason for the most major change in the PTA Setup Request functionality between 11i and R12: There is no longer a single PTA Setup Request form.

Separating the Project-Task Setup and the Award Setup Requests makes it possible to create at the same time multiple setups for projects linked to a single award. Please note that the order of creating the requests does not matter.

General Changes

Order of Fields

For R12 the placement of fields has been modified to both account for modifications to the overall functionality and to better suit the flow of data entry in the Setup Requests.

Processing Area LOV

In 11i the Processing Area was chosen by selecting a radio button:

![Processing Area Options]

In R12 a List of Values is utilized for selecting the Processing Area:

![Processing Area Options]

Auto-population of Administration Contact

The name, e-mail address, and phone number fields on each of the Setup Request forms are now auto-populated based on the user creating the
request. The Administration Contact may be changed by removing the auto-populated name and entering/selecting a new individual.

<table>
<thead>
<tr>
<th>Administrative Contact</th>
<th>Lindsay, Erin B</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Phone</td>
<td>626-395-3596</td>
</tr>
<tr>
<td>Admin Email</td>
<td><a href="mailto:erin.lindsay@caltech.edu">erin.lindsay@caltech.edu</a></td>
</tr>
<tr>
<td>Comments</td>
<td></td>
</tr>
<tr>
<td>Setup Status</td>
<td>Work in process</td>
</tr>
<tr>
<td>Created By</td>
<td>ELINDSAY</td>
</tr>
</tbody>
</table>

Form Personalization

The R12 upgrade enabled IMSS to easily personalize forms based on data entered by the user.

- Project-Task Setup Request
  - Fabrication Types: Do not appear unless the user has indicated that the project is for a fabrication.
  - Fabrication Form: Navigation appears if the user selects Equipment as the Fabrication Type.
• Award Setup Request

  ✓ Processing Area: The choice of Processing Area determines a possible additional field:

  - Endowment or Gift Fund adds a field for Gift Endowment Use

  - Sponsored Research adds a field for Payroll Coordinator

  - Auxiliaries, General Budget, or Physical Plant have no additional field
Searching for Request Setups

The results displayed when searching for a Project-Task Setup or Award Setup Request have different columns shown in R12 than those shown in 11i.

- **Project-Task Setup Request**

- **Award Setup Request**

*Linking Projects and Awards*

In R12 the Project-Task Setup is separated from the Award Setup. The separation allows for the linking of many projects to a single award and the linking of many awards to a single project.

**Linking a Project to an Award Setup Request**

The Project Linking function exists in the middle of the Award Setup Request form:
There are two ways to link a Project to an Award Setup Request:

**Add Linked Project**

The simplest way to link is by choosing an already-existing Project:

- Click on “Add Linked Project” button
- Enter the Project Number

- Click on “Apply” button and the user will return to the Award Setup Request.
If the project that the user wishes to link to the Award Setup Request does not yet exist, then the user can create a new Project Setup Request directly from the Award Setup Request. Clicking on the “Create New Linked Project” button:

- Saves the data entry for the current Award Setup Request.
- Navigates the user to the Project Setup Request form.
- Copies the Processing Area, Organization, Award Manager, Start Date and End Date into the new Project Setup Request. If needed, these items may be modified.
- After the new Project Setup Request is saved, the linked Award will appear in the Linking portion of the Project Setup Request form.

**PLEASE NOTE:** The Setup Status for the Award is “Work in process” and still must be submitted to Finance. This requires going back to the Award Setup Request. To avoid this, you may also first submit the Award Setup Request form before clicking the Create New Linked Project button.

**Linking an Award to a Project Setup Request**

The process of linking an award to a Project Setup Request is the same as linking a project to an Award Setup Request and also has two ways in which to link to an award:

**Add Linked Award**

The simplest way to link is by choosing an already-existing Award:

- Click on “Add Linked Award” button
- Enter the Award Number
Click on “Apply” button and the user will return to the Project Setup Request.

If the award that the user wishes to link to the Project Setup Request does not yet exist, then the user can create a new Award Setup Request directly from the Project Setup Request. Clicking on the “Create New Linked Award” button:

- Saves the data entry for the current Project Setup Request.
- Navigates the user to the Award Setup Request form.
- Copies the Processing Area, Organization, Project Manager, Start Date and End Date into the new Award Setup Request. If needed, these items may be modified.
- After the new Award Setup Request is saved, the linked Project will appear in the Linking portion of the Award Setup Request form.

**PLEASE NOTE:** The Setup Status for the Project is “Work in process” and still must be submitted to Finance. This requires going back to the Project Setup Request. To avoid this, you may also first submit the Project Setup Request form before clicking the “Create New Linked Award” button.
Adding Personnel

Personnel are added to Project-Task Setup and Award Setup Requests for two reasons:

- Identify the individual’s role within Oracle Grants Accounting
- Provide the individual data access to the specific Project, Task, and/or Award within Caltech’s data warehouse

In both 11i and R12, the Add Personnel function exists at the bottom of the Setup Request forms:

![Image of Add Personnel function in Oracle Grants Accounting]

![Image of Award Setup Details and Project Setup Details]

![Image of Projects Linked to This Award and Awards Linked to This Project]
The change from Discoverer to Cognos allowed for a change in the way that security is handled in the data warehouse. Unlike Discoverer, access to salary expenditures can be defined in Cognos at the individual account level. This change necessitated a change in the Setup Request Personnel form.

Clicking on the “Add New Person” button navigates the user to the Personnel form.

The Project Personnel form has an additional field to allow the user to enter specific tasks for task-level access within the Caltech data warehouse.

**Please Note:** If the person is to have access to the entire project, please do NOT enter task numbers into the access form. This field should ONLY be used to identify task-level access when a person doesn’t have access to the entire project.

After a person is added to a Project Setup Request or to an Award Setup Request the person appears in the Personnel section of the Setup Request form.