



# PTA SETUP REQUEST

*Creating a Task from a Task Setup Request*

IMSS

6/23/2011



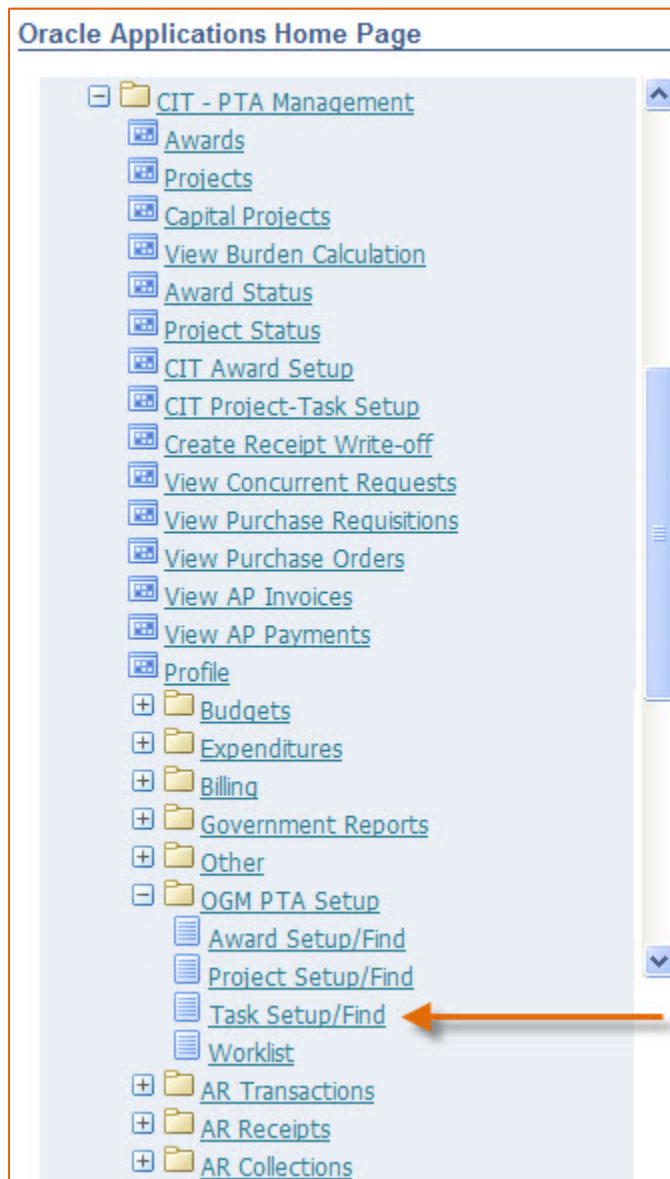
# PTA SETUP REQUEST

## *Creating a Task from a Task Setup Request*

You have received a workflow email from the Task Setup Request letting you know that somebody on campus has submitted a request for setting up a new task. What do you do?

### Navigation

Unlike the Project and Award creation, Task creation is done within the Task Setup Request. Begin the process by clicking on ***Task Setup/Find***.



## Search for Project

The email that you received will have the Project Number of the task(s) requested for creation. On the Task Setup Search form, enter the Project Number and click on **Search**.

PTA Setup: Task Setup

ORACLE CIT - PTA Setup

Home Logout Preferences Personalize Page

Task Setup Search

\* Indicates required field

\* Project Number IMSS.TASK

Search

Home Logout Preferences Personalize Page

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**TIP:** If you type in the Project Number and you get an Error message to select a valid value, use the List of Values (LOV) by clicking on the magnifying glass Icon.

## Viewing the Task Setup Request

When the form opens you will see the Project Number and other information about the project. In order to view the task(s) you must first expand the hierarchy by clicking on either the **Expand All** link or the **Expand** icon next to the Project Number.

Task Setup for Project: IMSS.TASK

Task Structure

Submit Return Setup Oracle Tasks

Expand All Collapse All

Focus Number	Name	Type	Start Date	End Date	Setup Flag	Setup Message	Add Sub Task	Update Task	Delete Task
+	IMSS.TASK TASK CREATION	Project	05-Jul-2011	04-Jul-2019					

Return to Search

**Note:** Using the **Expand** icon next to the project number will only expand to the top tasks. **Expand All** will show all tasks, including sub-tasks. In addition, the expansion will only show the first ten of any group, e.g., the first ten top tasks or the first ten sub-tasks.

After expanding the Project the tasks on which the **Update** icon is not grayed out are the tasks for which the Task Setup Request has been submitted.

Task Setup for Project: IMSS.TASK

**Task Structure**

Submit Return Setup Oracle Tasks

Expand All Collapse All

Focus	Number	Name	Type	Start Date	End Date	Setup Flag	Setup Message	Add Sub Task	Update Task	Delete Task
		IMSS.TASK TASK CREATION	Project	05-Jul-2011	04-Jul-2019					
	1	Task 1	Oracle Task	05-Jul-2011	04-Jul-2019					
	2	Task 2	CIT Temp Task	05-Jul-2011	04-Jul-2019	New				
	2.1	Subtask	CIT Temp Task	05-Jul-2011	04-Jul-2019	New				

Return to Search

To view the individual task, click on the **Update** icon and the Task Setup Details form will appear.

Task Setup

\* Indicates required field

**Task Setup Details**

Project Number **IMSS.TASK**  
 Project Start Date **05-Jul-2011**  
 Project Completion Date **04-Jul-2019**

\* Processing Area  ⓘ

\* Task Number

\* Task Name   
 Description

\* Start Date  ⓘ  
 (example: 22-Jun-2011)

Completion Date  ⓘ  
 (example: 22-Jun-2011)

Manager Name  ⓘ

Organization Name  ⓘ

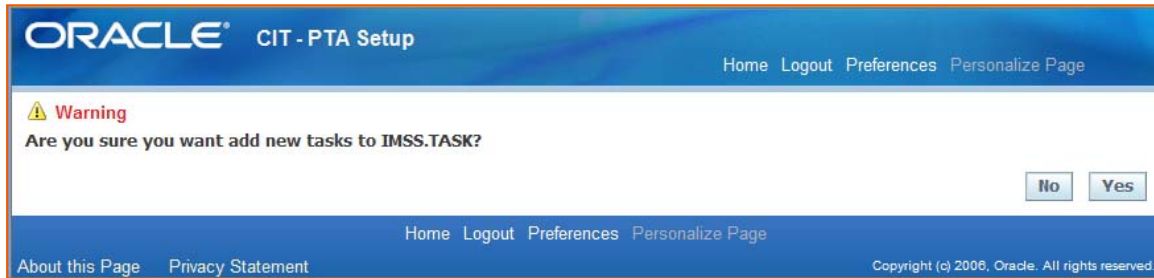
Comments

Save Cancel

You are able to make changes to the request within this form. Please make sure that the Task Number has NO spaces or special characters. If you have made any modifications, please click on the **Save** button.

## Creating the Tasks

After viewing the Task Setup Request and making any necessary modifications the Tasks can be created in Oracle by clicking on the **Setup Oracle Tasks** button. A warning will appear to verify that you do want to set up the tasks.



Clicking **Yes** will create the tasks in Oracle and you will no longer be able to modify and/or delete the task via the Task Setup form.

## Other Options

There are other options available within the Task Setup Request process.

### *Returning the Task Setup Request*

If there are modifications to make to the Task Setup Request and you would prefer the requester to make those changes, then the request can be returned to the requester by clicking on the Return button.

### *Deleting the Task Setup Request*

If the Task Setup Request is no longer needed, you can delete the request by clicking on the Delete icon.

If a Task Setup Request has been submitted, but the task was created from within Oracle via the Project Management form, the Task Setup Request will still exist in the system. This can cause a problem for the users because after a Task Setup Request has been submitted to Finance, no other Task Setup Requests can be created for that project until the Task Setup Request has been handled by creating the tasks, returning the request, or deleting the request.