PTA Setup Request

Tips, Hints, and Issue Solutions
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TIPS AND HINTS

Linking Projects and Awards

In R12 the Project-Task Setup is separated from the Award Setup, i.e., there is no longer a single PTA Setup Request. The separation allows for the linking of many projects to a single award, and the linking of many awards to a single project. The downside is that you are now required to create and submit two separate requests, one each for the new Project and the new Award.

When creating requests for a project and an award that will be linked, it doesn’t matter which you do first. The second request may be copied from the first (e.g., the project may be copied from the award), and doing this automatically creates the link between the two.

Tip: For this tip’s example, let’s assume that you have created the Award Setup Request first and plan on copying to the Project Setup Request.

Before you click on the Create New Linked Project button, complete and click on the Submit button. The reason is that if you don’t submit the Award Setup Request before creating the new linked project, you will have to go back into the Award Setup, find the Award, and click on the Submit button. Finance cannot create the projects/awards until after the requests have been submitted.
KNOWN ISSUES AND SOLUTIONS

Task Setup – Searching Problem

You want to add a new task to an existing project, but when you search for a project that you KNOW exists you get an error indicating that the project number you have entered is not valid.

This can happen when there is at least one other project number that starts with the same characters as the project for which you are searching, e.g., IMSS.IBS and IMSS.IBSJPLIA. Use the List of Values (LOV) icon to open the LOV pop-up window and select the project.

Tip: Clicking the Quick Select icon will select the project and close the pop-up window.
LOV Icon Freezes Browser Window

You need to use the List of Values to search for the correct value, but when you click on the icon your browser window suddenly appears as if behind opaque glass and the window freezes. This will happen when using Internet Explorer and the Tabs settings are set to open pop-ups in a new tab. To resolve this issue you need to change the settings so that either IE decides how pop-ups should open or pop-ups always open in a new window. To do this, follow these steps:

- Select Internet Options under the IE Tools menu item.
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- Under *Tabs* click on the *Settings* button

- In the section *When a pop-up is encountered*: select either the first or second choice.