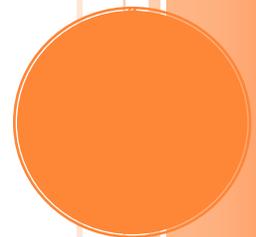




# PTA SETUP REQUEST

*Tips, Hints, and Issue Solutions*

IMSS



# 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.

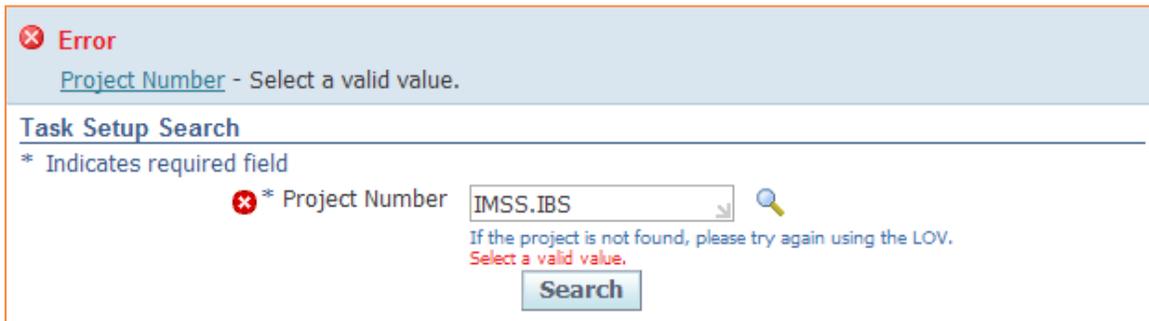
**Tip:** For this tip's example, let's assume that you have created the Award Setup Request first and plan on copying to the Project Setup Request.

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.



**Error**  
Project Number - Select a valid value.

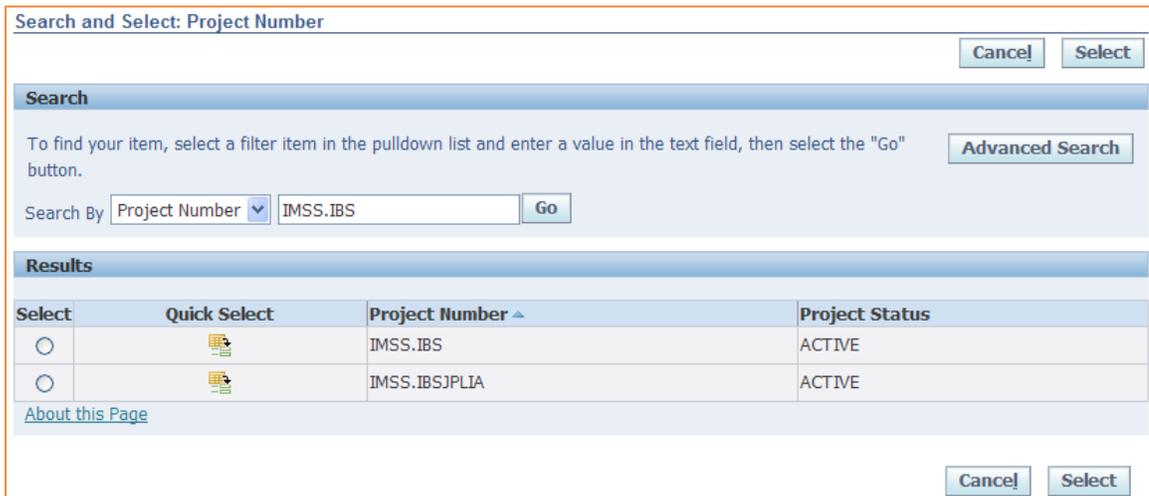
**Task Setup Search**  
\* Indicates required field

\* Project Number  

If the project is not found, please try again using the LOV.  
Select a valid value.

**Search**

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.



**Search and Select: Project Number** Cancel Select

**Search**

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button. Advanced Search

Search By   Go

**Results**

Select	Quick Select	Project Number ▲	Project Status
<input type="radio"/>		IMSS.IBS	ACTIVE
<input type="radio"/>		IMSS.IBSJPLIA	ACTIVE

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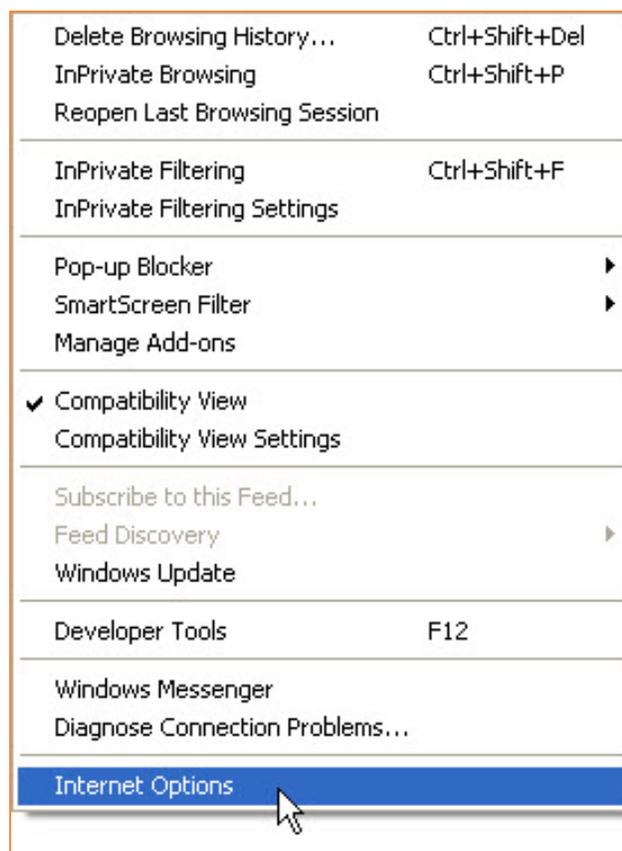
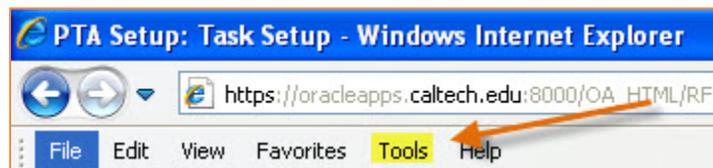
Cancel Select

**Tip:** Clicking the Quick Select icon  will select the project and close the pop-up window.

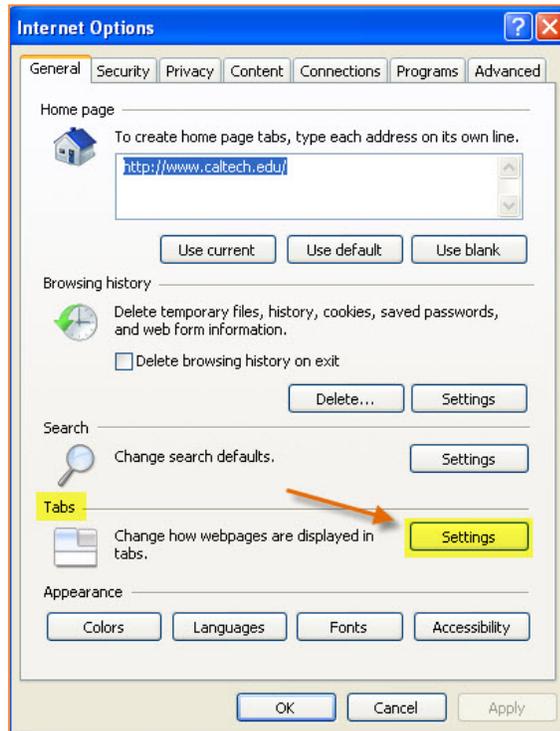
## LOV Icon Freezes Browser Window

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.



- Under *Tabs* click on the *Settings* button



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

