

PPM TASK: UPDATE PROJECT MANAGER

Use this task to update the Project Manager for a PPM Project

NAVIGATION:

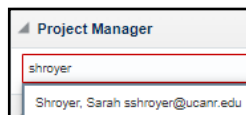
Oracle Home Page > Projects > Project Financial Management

Step	Action
1.	When you navigate to the My Projects page, search for the PPM Project
2.	Select Show Filters located to the right of the search box below My Projects
3.	Using one of the search methods below, locate the PPM Project

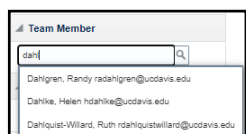
SEARCHING TIPS:



If you know the project name or number, enter it in the **Project Name or Number** search box and select the magnifying glass to search. You can search partial names for a list of possible projects: Example: Type **4H** for all projects with 4H in the name. Select the correct project and the results will appear.



If you know the project manager name, type the **last name** in the **Project Manager Search Box** and select the magnifying glass to search. Select the correct name.

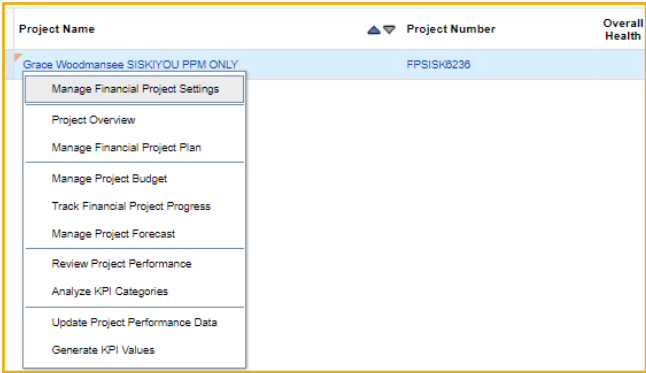


If you know the name of the PI, type the **last name** in the **Team Member Search Box** and select the magnifying glass to search. Select the correct name. As you type the name, options appear. Select the correct name.

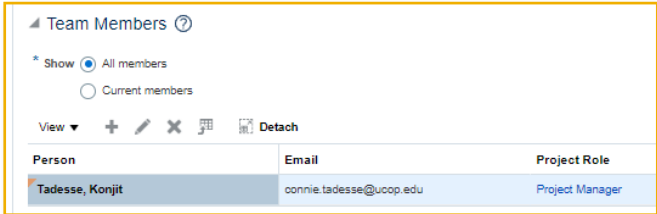


If you know the financial owning organization for the project, type the Financial Department (ANR begins 99). Select the correct organization and the results will appear.

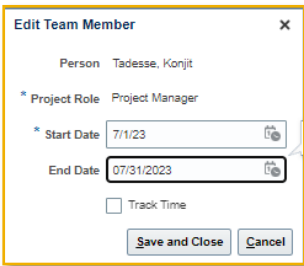
Step	Action
4.	Click on the Project Name or Project Number to reveal the action menu.
5.	Select Manage Financial Project Settings located at top of the action menu.



Step	Action
6.	Click on the Parties tab to reveal the Team Members panel.
7.	Next to *Show , Select the radial button All Members to view past and future assignments.



Step	Action
8.	Select the Pencil Icon  to edit the current Project Manager assignment.
9.	In the pop-up menu, complete the End Date for the current Project Manager. Note: Enter a four-digit year for the data to record correctly (07/31/2023)



Step	Action
10.	Select Save and Close to record the change. The Team Member's role End Date will be updated to reflect the change.

Team Members

Show

All members

Current members

View

+

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🔍

Detach

Person	Email	Project Role	Start Date	End Date
Tadesse, Konjit	connie.tadesse@ucop.edu	Project Manager	7/1/23	7/31/23

Step	Action
11.	Add a new Project Manager by selecting the Plus Icon  to open the pop-up menu.
12.	Select the Down Arrow next to the Person field to reveal Search .

Add Team Members

* Person

* Project Role

Search...

* Start Date

m/d/yyyy

End Date

m/d/yyyy

Track Time

Save and Add Another

Save and Close

Cancel

Step	Action
13.	Select Search to reveal the search menu and enter the search criteria in the fields Name or Email Address . When searching by the Name field choose one of the following: With the Match All radial button selected, enter Last Name as search criteria. With the Match Any radial button selected, use Last Name or portion of the name as the search criteria.
14.	Select Search  Note: If you need more options to find the person select Advanced to allow options Starts With, Contains, Equals, Between, etc .

Search and Select: Person

Search

Advanced

Match

All

Any

** Name

Shroyer

** Email

Job

Search

Reset

Name	Job	Email	User Status
Shroyer, Sarah	FINANCIAL ANL 4	sshroyer@ucanr.edu	Active - Payroll Eligible

OK

Cancel

Step	Action
15.	Select the Row with correct person listed and select OK to accept.

Name	Job	Email	User Status
Shroyer, Sarah	FINANCIAL ANL 4	sshroyer@ucanr.edu	Active - Payroll Eligible
OKCancel			

Step	Action
16.	The name of the Team Member has been added to the Person field.
17.	Select the down arrow next to the Project Role field to reveal the list of roles. Note: Aggie Enterprise uses only the Project Manager and Principal Investigator roles.
18.	Select Project Manager to populate the field.

Add Team Members

* Person

Shroyer, Sarah

* Project Role

Project Manager

* Start Date

All

End Date

Award Participant

Save and

Cancel

Co-Principal Investigator

Grants Administrator

Principal Investigator

Project Administrator

Project Manager

Project Participant

Staffing Owner

Team Member

Step	Action
19.	Type the Start Date for the person to begin the role of Project Manager. Enter a start date that begins after the end date of the prior project manager. There cannot be two people assigned as project manager at the same time. When entering the date, use a four-digit year (08/01/2023). Select Save and Close

* Start Date

8/1/23

End Date

m/d/yy

☐ Track Time

Save and Add Another

Save and Close

Cancel

Step	Action
20.	The change in Project Manager is reflected in the Team Members panel . Note: If you only see the current Project Manager, Select the *Show All Members radial button to see past, current and future Team Members.
21.	Select Done to close Manage Financial Project Settings . End of Procedure.

GeneralPartiesPlanningFinancialReportingAdditional InformationCost Rate Overrides

Team Members ?

* Show

All members

Current members

View + ✎ ✕ 📅 Detach

Person	Email	Project Role	Start Date	End Date
Tadesse, Konjit	connie.tadesse@ucop.edu	Project Manager	7/1/23	7/31/23
Shroyer, Sarah	sshroyer@ucanr.edu	Project Manager	8/1/23	