## **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.

A Project Manager		
	shroyer	
-	Shroyer, Sarah sshroyer@ucanr.ed	

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.

🖌 Team Member		
	dahi Q	
	Dahlgren, Randy radahlgren@ucdavis.edu	
	Dahlke, Helen hdahlke@ucdavis.edu	
	Dahlquist-Willard, Ruth rdahlquistwillard@ucdavis.edu	

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.

-	Organization	
	992213	Q
	9922131 - Hansen REC	

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

My Projects ②	
Project Name or Number	0
Saved Search	
Recent Projects V Save	
Filters	\$
Expand All Collapse All	
🖌 Project Manager	
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A Project Status	
All	
Active 🔺	
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Pending Close	
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ок	
🖌 Team Member	_
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Organization	
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Step	Action
4.	Click on the <b>Project Name</b> or <b>Project Number</b> to reveal the action menu.
5.	Select Manage Financial Project Settings located at top of the action menu.



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

◢ Team Members ⑦		
* Show ● All members Current members View ▼ + ♪ ★ 第 前 Detach		
Person	Email	Project Role
<sup>7</sup> Tadesse, Konjit	connie.tadesse@ucop.edu	Project Manager

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

Edit Team Mer	nber	×
Person	Tadesse, Konjit	
* Project Role	Project Manager	
* Start Date	7/1/23	Ëe
End Date	07/31/2023	Êe
	Track Time	
	<u>Save and Close</u>	<u>C</u> ancel

Person

Tadesse, Konjit

Email

connie.tadesse@ucop.edu

Step	Action	
10.	Select <b>Save and Close</b> to record the change. The Team Member's role <b>End</b> <b>Date</b> will be updated to reflect the change.	
	▲ Team Members ⑦     * Show ④ All members     ○ Current members     View ▼ + 〃 ★ 须 □ □ □ trach	

Project Role

Project Manager

Start Date End Date

7/31/23

7/1/23

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

Add Team Members X					
* Person		-			
* Project Role	Search				
* Start Date	m/d/yy	Ê			
End Date	m/d/yy	Ċ.			
	Track Time				
Save and Add Another Save and Close Cancel					

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

Search and Select: Person			×
A Search			Advanced
Match 🔿 All 💿 Any			** At least one is required
** 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 <b>Row</b> with correct person listed and select <b>OK</b> to accept.

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

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

Add Team Mer	×	
* Person	Shroyer, Sarah	•
* Project Role	Project Manager V	
* Start Date	All Award Participant	
End Date	Co-Principal Investigator	
Save and	Grants Administrator Principal Investigator Project Administrator	<u>C</u> ancel
	Project Manager	
	Project Participant Staffing Owner	
	Team Member	

Step	Action
19.	Type the <b>Start Date</b> for the person to begin the role of Project Manager. Enter a <b>start date</b> 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 <b>Save and Close</b>
	* Start Date 8/1/23

* Start Date	8/1/23	Ťø	a
End Date	m/d/yy	Î	
	Track Time		
Save and	Add Another	<u>Save and Close</u>	<u>C</u> ancel

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

General Partie	s Planning	Financial F	Reporting	Additional Information	Cost Rate O	verrides		
✓ Team Members ⑦								
* Show 💿 A 🔵 C	* Show  All members Current members							
View 🔻 🖷	· / X	]理 版 D	etach					
Person			Email			Project Role	Start Date	End Date
Tadesse, Kon	it		connie.ta	adesse@ucop.edu		Project Manager	7/1/23	7/31/23
Shroyer, Sarah sshroyer@ucanr.edu Project Manager 8/1/23								