## PPM TASK: SEARCHING PPM NON SPONSORED PROJECTS FOR ACADEMICS

Use this help guide to search for PPM Projects in Oracle

## **NAVIGATION:**

Oracle Home Page > Projects > Project Financial Management

| Step | Action  |
|------|---|
| 1.   | When you navigate to the <b>My Projects</b> page, select the <b>Show Filters</b> link to reveal search filters. |

| My Projects ⑦          |   |              |
|------------------------|---|--------------|
| Project Name or Number | 0 | Show Filters |
| View 🔻 🎵 📄 Detach      |   |              |

| Step | Action  |
|------|---|
| 2.   | To view PPM projects by PI, type the <b>last name</b> in the <b>Team Member</b> search box and a list of options appears. |



| Step | Action  |                |
|------|---|----------------|
| 3.   | Select the <b>name and email address</b> of the PI and the results appear on the right. |                |
|      | Hide Filters Team Member Volk, Emma ×   |                |
|      | Project Name  | Project Number |

| Step | Action   |
|------|--|
| 4.   | Alternatively, you could search by selecting the <b>magnifying glass</b> . Select <b>Advanced</b> in the pop-up menu |
| 5.   | Change the parameters for the search to <b>Contains</b> and type in the name.  |

| Search and Se      | lect: Team Member | ×                           |
|--------------------|-------------------|-----------------------------|
| Search             |                   | Basic                       |
|                    |                   | ** At least one is required |
| ** Person          | Contains 🗸 Wilso  |                             |
| ** Email           | Starts with       |                             |
|                    | Search Reset      | Add Fields   Reorder        |
| Person             | Email             |                             |
| No rows to display |                   |                             |
|                    |                   | OK Cancel                   |

| Step | Action   |
|------|--|
| 6.   | Select <b>Search</b> to see the list of results.       |
| 7.   | Select the <b>name of the PI</b> and press <b>OK</b> . |

| Search and Select: Team Me | mber X                           |
|----------------------------|----------------------------------|
| ▲ Search                   | Basic                            |
|                            | ** At least one is required      |
| ** Person Contains         | ✓ Wilso                          |
| ** Email Olada with        |                                  |
| Email Stans with           | •                                |
|                            | Search Reset Add Fields  Reorder |
| Person                     | Email                            |
| Rumbeiha, Wilson           | wkrumbeiha@ucdavis.edu           |
| Wilson, Dan                | dxwilson@ucdavis.edu             |
| Wilson, David              | dkwilson@ucdavis.edu             |
| Wilson, Dennis             | dwwilson@ucdavis.edu             |
| Wilson, Houston            | samhw@ucr.edu                    |
| Wilson, Janine             | jlflathmann@ucdavis.edu          |
| Wilson, Martin             | mcwilson@ucdavis.edu             |
| Wilson, Monica             | mawilson@ucdavis.edu             |
| Wilson, Robert             | rgwilson@ucdavis.edu             |
| de Belen Wilson, Chris     | cdebelenwilson@ucdavis.edu       |
|                            | OK                               |

| Step | Action   |
|------|--|
| 8.   | The list of PPM Projects appears on the right side of the page.        |
| 9.   | Save the current search by selecting Save under the Saved Search Menu. |

| Saved Search       |        |
|--------------------|--------|
| My Active Projects | ✓ Save |
|                    |        |

| Step | Action  |
|------|---|
| 10.  | Name the saved search in the Create Saved Search pop-up. You can select the default check box to make this search your default search when you log in to the PPM Projects module. End of Procedure. |