

PTA SETUP REQUEST

Tips, Hints, and Issue Solutions

IMSS

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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.

Serror Project Number - Select a valid value.	
Task Setup Search [★] Indicates required field [★] Project Number	IMSS.IBS 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 a	nd 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" Advanced Search button. Search By Project Number V IMSS.IBS Go						
Results	;					
Select	Quick Select	Project Number 🔺	Project Status			
0		IMSS.IBS	ACTIVE			
0		IMSS.IBSJPLIA	ACTIVE			
About th	is Page					
				Cancel Select		

Tip: Clicking the Quick Select icon ¹/₂ 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 \bigcirc 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.





- Internet Options **?** X General Security Privacy Content Connections Programs Advanced Home page To create home page tabs, type each address on its own line. http://www.caltech.edu/ Use current Use default Use blank Browsing history Delete temporary files, history, cookies, saved passwords, and web form information. Delete browsing history on exit Delete... Settings Search Change search defaults. Settings Tabs Change how webpages are displayed in Settings 100 tabs. Appearance Colors Languages Fonts Accessibility Cancel OK Apply
- Under *Tabs* click on the *Settings* button

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

Tabbed Browsing Settings	×
Enable Tabbed Browsing (requires restarting Internet Explorer)	
Warn me when closing multiple tabs	
Always switch to new tabs when they are created	
Enable Quick Tabs (requires restarting Internet Explorer)	
Open only the first home page when Internet Explorer starts	
Enable Tab Groups (requires restarting Internet Explorer)	
When a new tab is opened, open:	
Your first home page	
When a pop-up is encountered:	
O Let Internet Explorer decide how pop-ups should open	
Always open pop-ups in a new window	
O Always open pop-ups in a new tab	
Open links from other programs in:	
O A new window	
• A new tab in the current window	
O The current tab or window	
Restore defaults OK Cancel	