



Create a Task - Process Help

Use these instructions to create a single or multiple tasks.

Prerequisites

- You must have one of the following responsibilities to create a task:
 - ORG Account Establishment Specialist
 - ORG Account Establishment Specialist with Budget Approval
 - ORG Account Establishment Administrator
- The project must already exist in the Oracle business system.

To create a task:

1. Select **Projects** to open the **Find Projects** form.
2. Search for one of the following to narrow your search:
Number, name, type, organization, status, category, class code, Key Member name, number, role. Click **Find** to open the Projects, Templates Summary form.

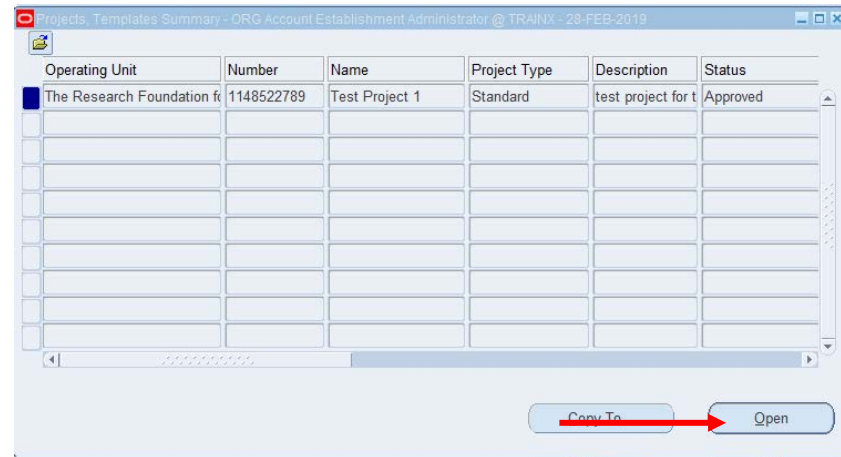
The screenshot shows the 'Find Projects' form with the following fields and values:

- Project Search:** Search For: Projects, Templates; Number: 1148522789
- Key Member:** Name, Number, Role
- Customer:** Name, Number, Relationship
- Classification:** Category, Class Code

Buttons: Clear, Find (highlighted with a red arrow)

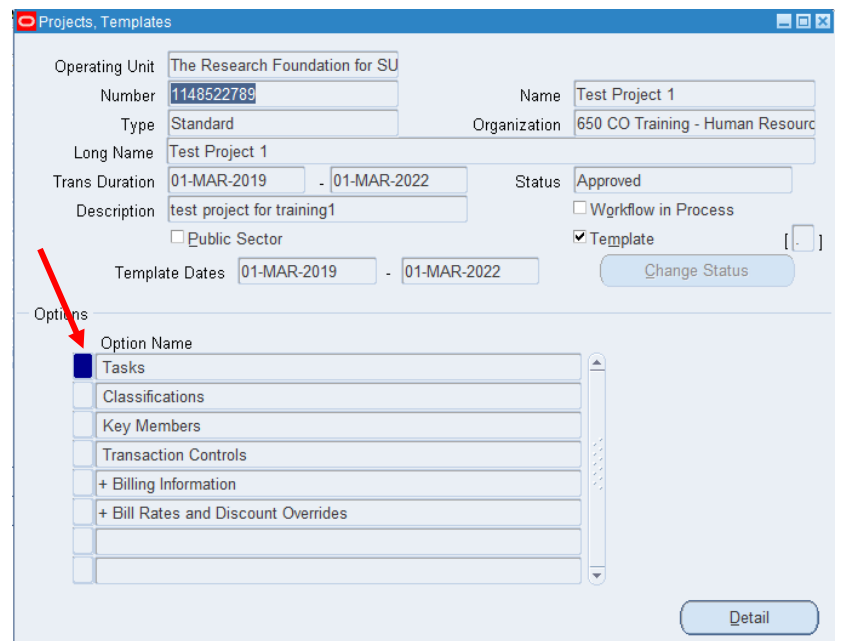
3. Click in the row to select the project that you will use to create the new task.

4. Click **Open** to open the Projects, Templates form.



5. Click the box next to Tasks in the Options region to open the Tasks form.

Note: One task defaults from the project with number, name, description, start date, completion date, and an on/off campus indicator. This task can be changed within project parameters.



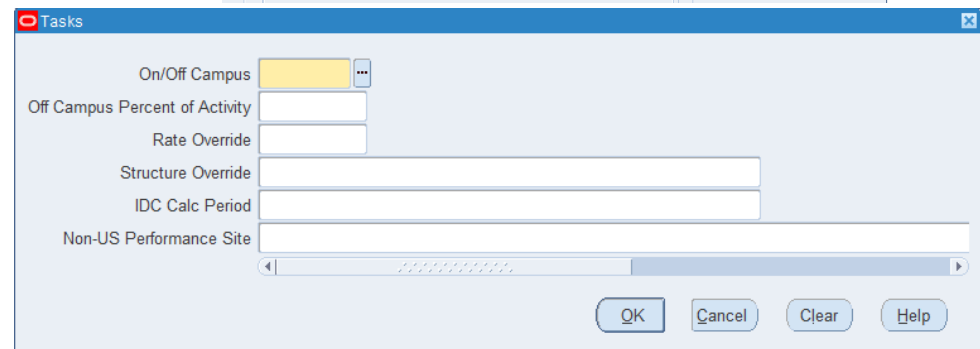
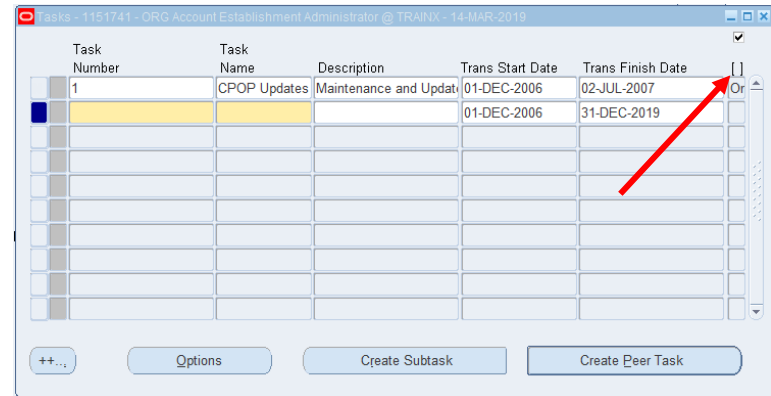
6. To enter a new task, click the green plus sign (+) on the tool bar to add a new line. Enter the following fields:

- Task Number
- Task Name
- Description
- Start Date
- Completion Date

7. Click the [] Defined FlexField to open the Tasks form.

8. Enter the following fields:

- On or off campus
- Off Campus Percent of Activity
- Rate Override
- Structure Override
- IDC Calc Period
- Non-US Performance Site

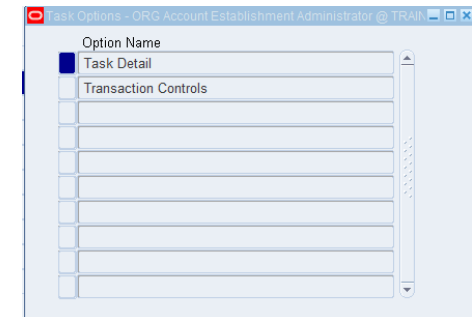


9. Click **OK** to return to the Tasks form.

10. Click **Options** to open the Task Options form.

11. Click the box next to the Task Details option to open the Task Details form.

Note: The previous task or project information will automatically populate in the appropriate fields. If required, this information can be changed.



12. Enter the following fields:

- Task Manager
- Organization
- Service Type

13. Click **File > Save** to save your changes.

14. Click **File > Close Form**.

If you need to **create an additional task**, perform one of the following:

1. Go to **Step 6** and select next blank line. The start and completion date fields will be automatically populated from the project. Dates can be changed as required but must be within the project period.

If you need to **establish transaction control** for current task, click the box next to Transactions Controls on the Task Options form to open the Transaction Controls form.

2. Enter the required information.

If you need to enter **Task Details**, on the Task Options form, click the box next to the Task Detail to open the Task Detail form.

1. Enter any required information.
2. Click **File > Save** to save your changes.
3. Click **File > Close Form** to return to the Task Options form.

The screenshot shows a web-based form titled "Task Details - 1151741, 1 - ORG Account Establishment Administrator @ TRAINX - 14-MAR-2019". The form contains the following fields and values:

- Task Number: [Empty]
- Task Name: CPOP Updates
- Long Task Name: CPOP Updates
- Task Manager: Monaco, Mr. Eugene J
- Organization: 650 CO Administration -
- Service Type: Public Services
- Work Type: [Empty]
- Trans Duration: 01-DEC-2006 - 02-JUL-2007
- Allow charges:
- Description: Maintenance and Updates to the CPOP W
- Product Source: [Empty]
- Source Reference: [Empty]
- Location: [Empty]
- Address: [Empty]
- [Or]
- Receive Inter-Project Invoices