

## Modify Project or Task Information

Use these instructions to modify project or task information. **Note:** Changes made on the project may require additional changes on any corresponding tasks.

## Prerequisites

- The project and the task must exist.
- You must have one of the following responsibilities to modify project or task information:
  - o ORG Account Establishment Administrator
  - o ORG Account Establishment Specialist with Budget Approval
  - o ORG Account Establishment Specialist

## To modify project or task information:

- 1. Navigate to **Projects** to open the **Find Projects** form.
- 2. Enter the Project Number.
- 3. Click Find to go to the Projects, Templates Summary window.
- 4. Click in the row that contains the project to be modified.
- 5. Click **Open** to go to the **Projects, Templates** window.

If you need to modify general project information, click in the field(s) – Organization, Name, Trans Duration, Long Name, Description. Projects, Templates

Make the necessary modifications, click the **Save** icon.

If you need to add credit distribution information, click Tools, Credit Distribution, make the necessary distribution percentages, click the Save icon.

Tools Window Help	ORF_AV	VD_PROJ_RELATION -	ORG Account Estab	oli 🗖 🗖 🔀	OR	F_AW	D_PROJ_RELATION	- ORG Account Est	abli 🔜 🗖 🏼
Monitor Project Workflows									
Update Transaction Dates		Award Number	Percentage		r		Award Number	Percentage	
Updale Tasks Process Updales		84382	0				84382	100	
Copy to all Tasks Copy to all tasks without Manual Overrides Copy to all Subtasks Copy to all Subtasks without Manual Overrides		84383	0		3		84383	0	
Credit Recognition						•[			
		( )	Edit	ancel	I		(	Edit	Cancel

If you need to change the project status, click Change Status to select the

appropriate status. Click the Save icon.





Operating Unit The Research Foundation for SU 1153205

230 Shineman Stewart Inc.

Description Oswego Renaissance: A Possible Future

- 31-DEC-2019

Standard

04-APR-2019

Public Sector

Number

Long Name Trans Duration

Туре

Ι.

Name 230 Shineman Stewart

Template

Workflow in Process

Change Status

Organization 230 Psychology

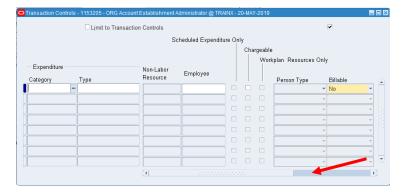
Status Approved

If you need to **modify key members** on the project, click in the **Key Members** row to go to the Key Members window, make any necessary modifications in the Employee Name, Number, Role From/To fields. Note that an individual cannot have the same role within the same effective date period. Click the **Save** icon.

			Effective		
Employee Name	Number	Role	From	To	
	3572	Principal Investigator	04-APR-2019		
-			04-APR-2019		
			1		
			1		
				1	
			1		

Tasks	<b></b>
Classifications Key Members	
Transaction Controls	
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If you need to **modify transaction controls**, click in the Transaction Controls row to go to the **Transaction Controls** window. Make the necessary changes to the Category, Type, From/To (you will need to use the horizonal scroll bar). To establish exclusive transaction control, leave **No** in the Billable field. To establish inclusive transaction trolls, check the **Limit to Transaction Controls** check box. Click the **Save** icon.



Tasks	(A)
Classifications	
Key Members	
Transaction Controls	
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If you need to **modify an existing task or add a task**, click in the **Tasks** row to go to the Tasks Window. Make the necessary modifications/adds by placing the cursor next to the Task Number, then click **Options, Task Detail**. Enter the name of the Task Manager/Organization, Service Type. Click the **Save** icon. **Note:** After an expenditure has occurred, you cannot modify this field if this is the lowest level task for the project.

Option Name			Ta	sk mber	Task Name	Description	Trans Start Date	Trans Finish Date		Option Name	
Tasks	<b>^</b>				Task 1	Task 1	04-APR-2019	31-DEC-2019	Or -	Task Detail	
Classifications			2		CS2	Cost Share	04-APR-2019	31-DEC-2019	Or		
Key Members										Transaction Controls	
Transaction Controls											
	18										
						0					
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					1						
		Detail									
		( Deran	(++,)	( in the second	tions	Create Subt		Create Peer Task			

If you need to **create a subtask**, click **Create Subtask** and perform the above procedure.

If you need to **modify the NACUBO classification**, click in the Classifications row to go to the Classifications window. NOTE: You can only make this change if expenditures have not been made on the project. Delete the row for the current **NACUBO** classification, and then add a new classification row and select the correct **Class Code**. Click the Save icon.

Tasks	<b>^</b>	Category	Class Code	Code Description	Percentage
Classifications					Fercentage
Key Members		NACUBO	Public Services	Public Services	
Transaction Controls					
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			][		
	( Detail )				