



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:
 - ORG Account Establishment Administrator
 - ORG Account Establishment Specialist with Budget Approval
 - ORG Account Establishment Specialist

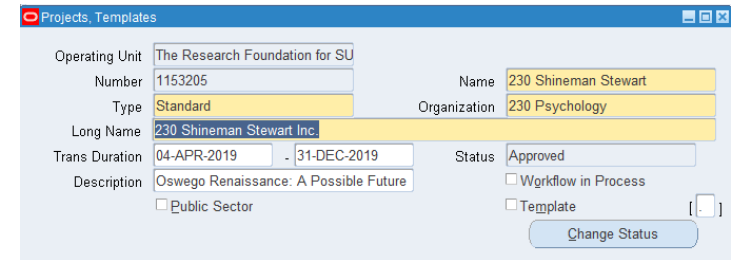
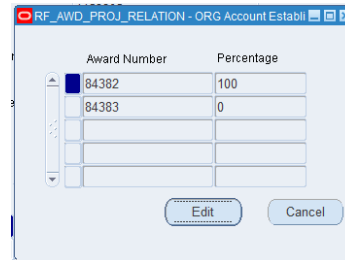
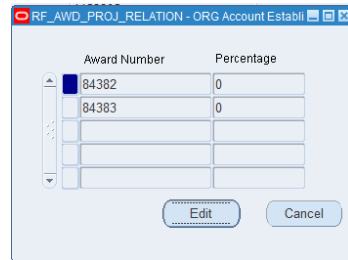
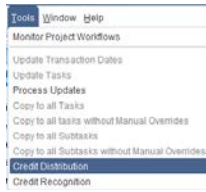
To modify project or task information:

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.

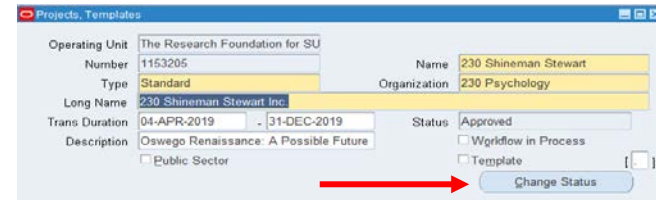
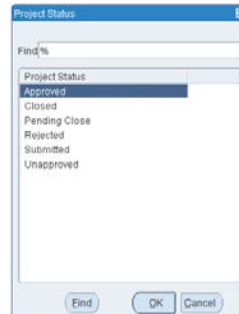
If you need to **modify general project information**, click in the field(s) – Organization, Name, Trans Duration, Long Name, Description.

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

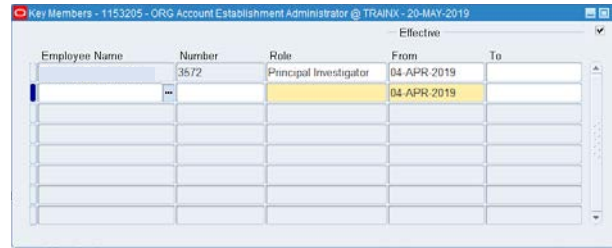
If you need to **add credit distribution information**, click **Tools, Credit Distribution**, make the necessary distribution percentages, click the **Save** icon.



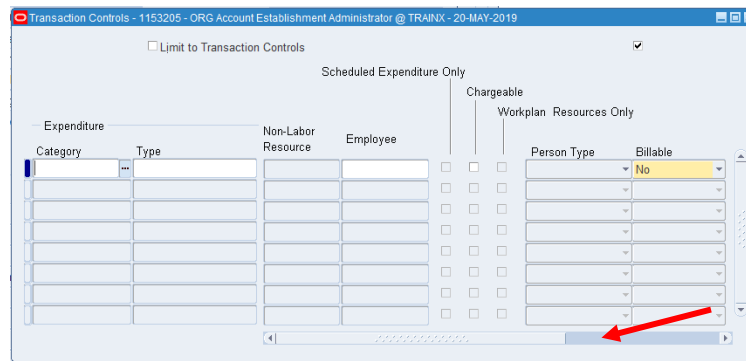
If you need to **change the project status**, click Change Status to select the appropriate status. Click the **Save** icon.



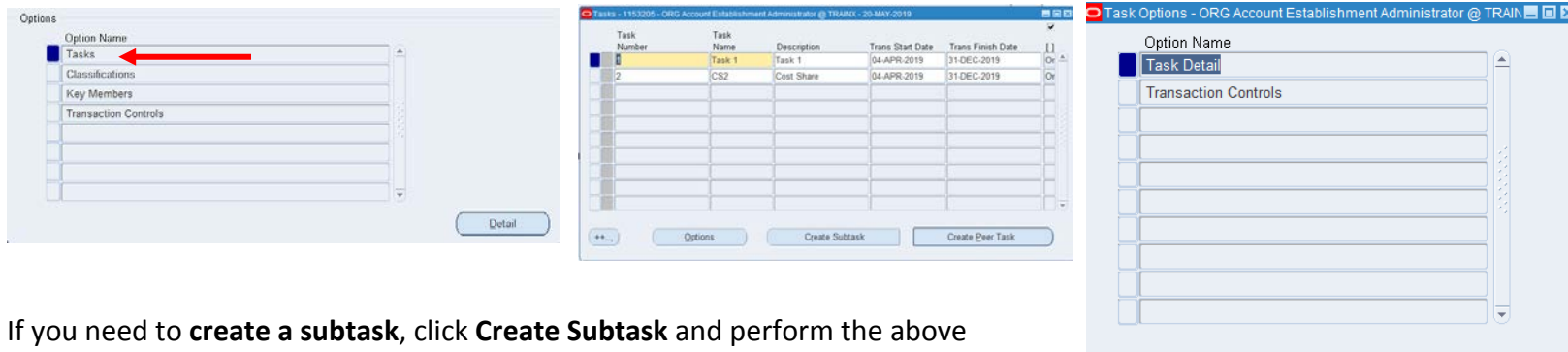
If you need to **modify key members** on the project, click in the **Key Members** row to go to the Key Members window, make any necessary modifications in the Employee Name, Number, Role From/To fields. Note that an individual cannot have the same role within the same effective date period. Click the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



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 horizontal scroll bar) . To establish exclusive transaction control, leave **No** in the Billable field. To establish inclusive transaction controls , check the **Limit to Transaction Controls** check box. Click the **Save** icon.



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.



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.

