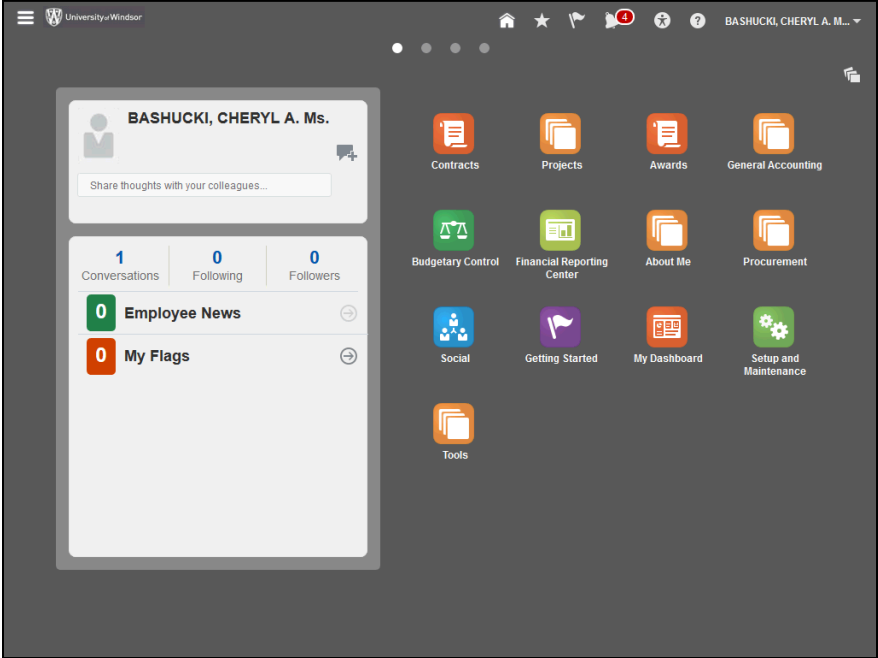


**PCM 01: Manage the Project Plan Settings**  
Created on 2/28/2018

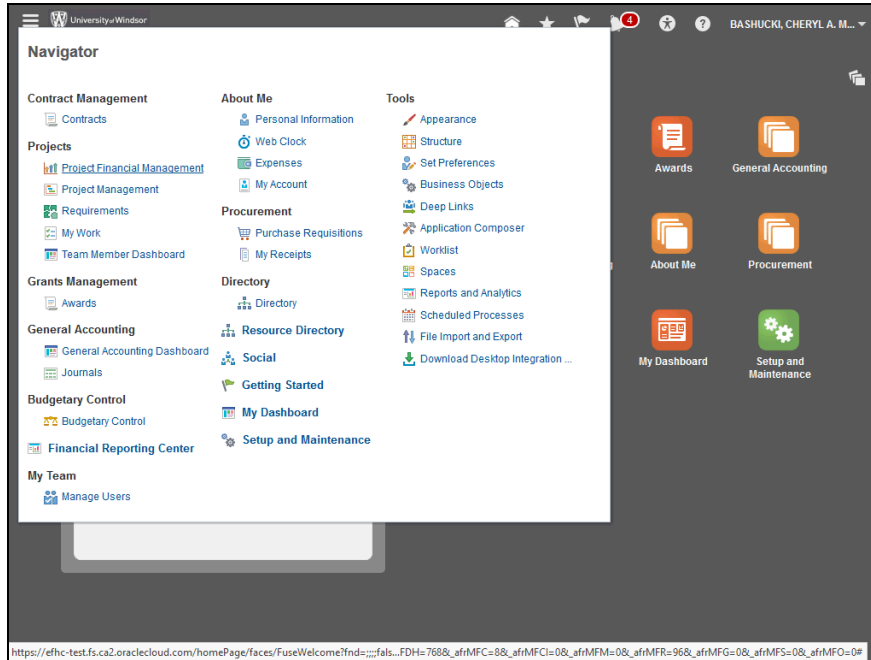
# PCM 01: Manage the Project Plan Settings

## Procedure

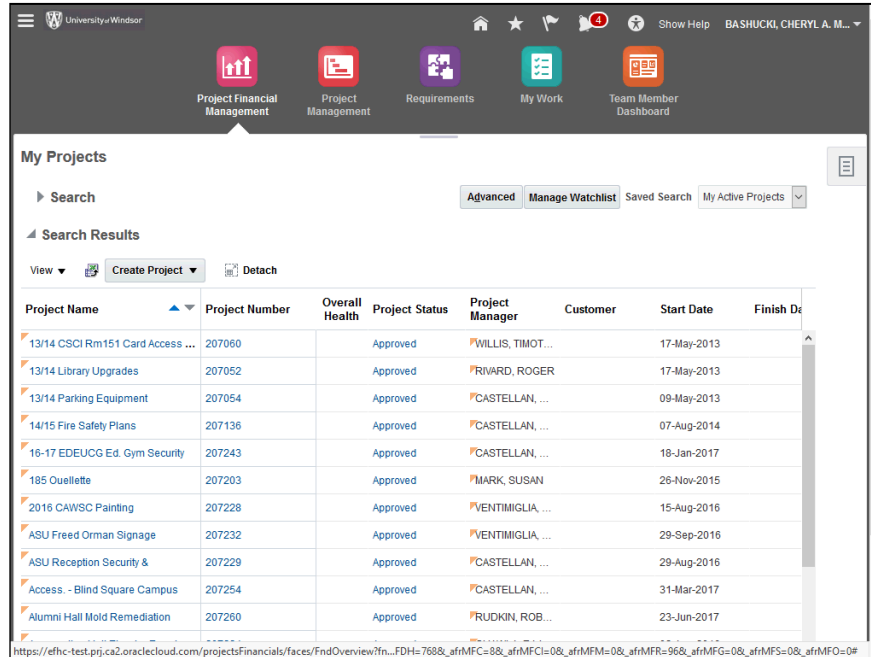
This User Guide outlines the steps required to manage the project plan settings.



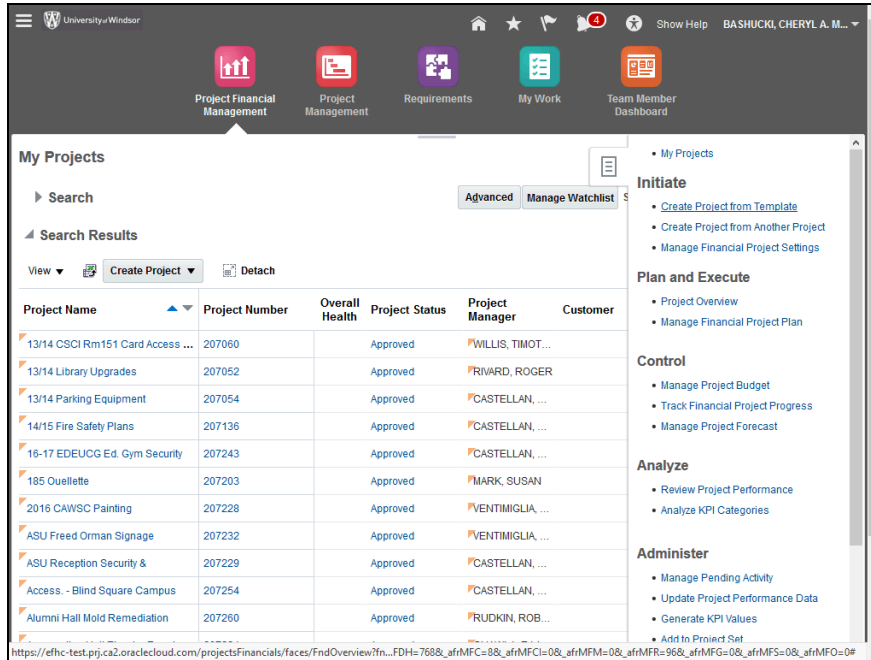
Step	Action
1.	Click the <b>Navigator</b> button. 



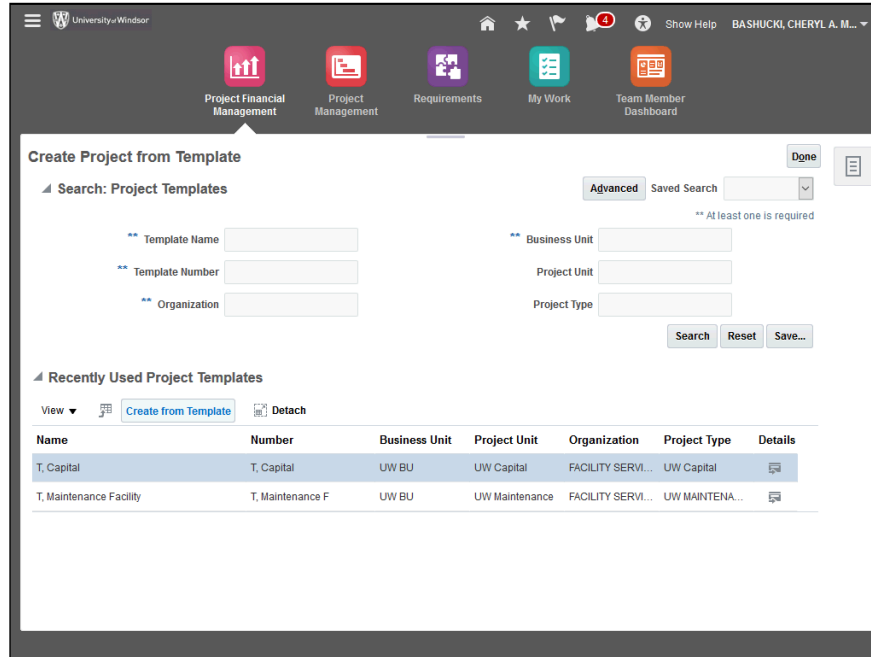
Step	Action
2.	Click the <b>Project Financial Management</b> link. <a href="#">Project Financial Management</a>



Step	Action
3.	Click the <b>Tasks</b> button.



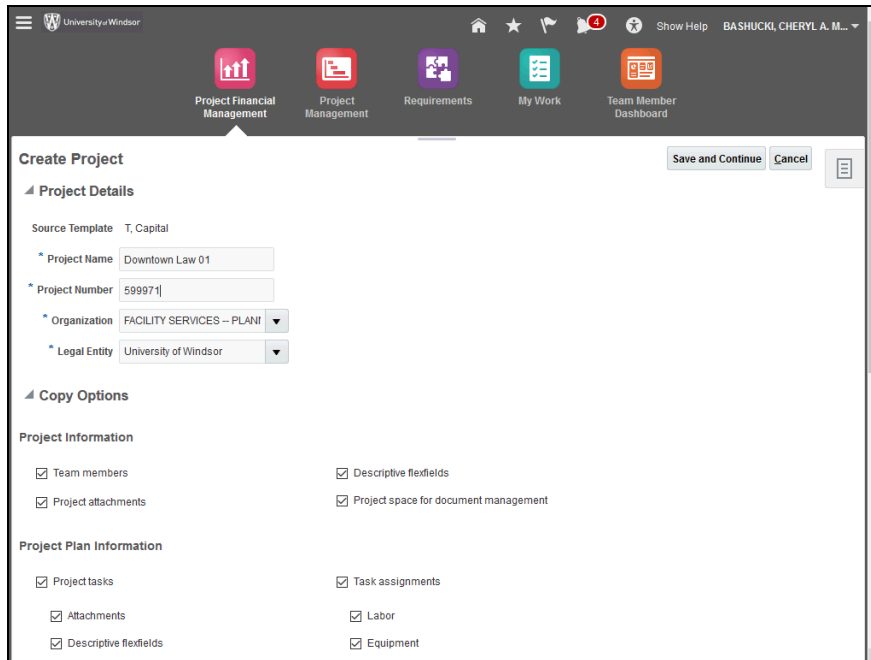
Step	Action
4.	Click the <b>Create Project from Template</b> link. <a href="#">Create Project from Template</a>



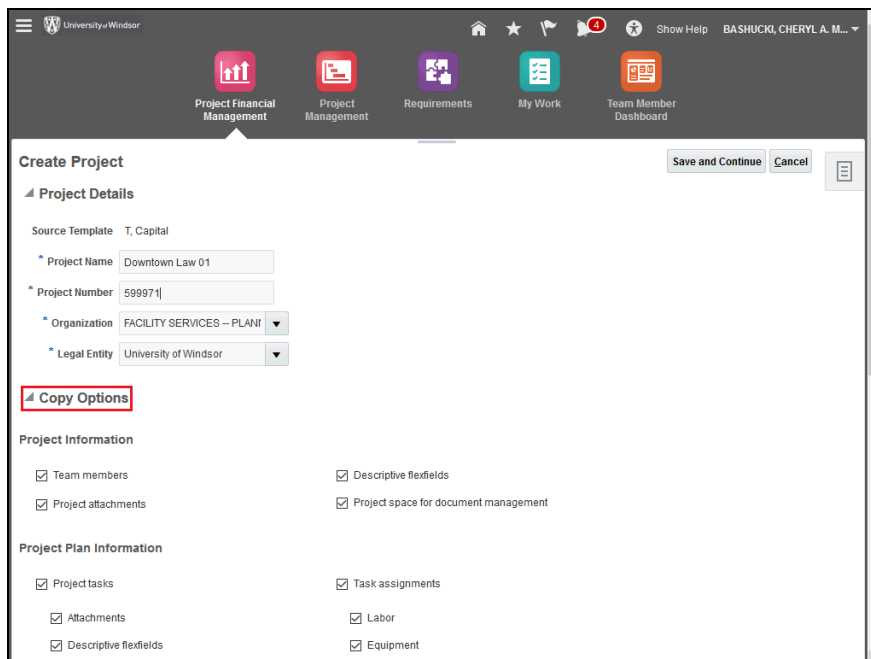
Step	Action
5.	Click the <b>Create from Template</b> button. <a href="#">Create from Template</a>

Step	Action
6.	Enter the required name in the <b>Project Name</b> field.

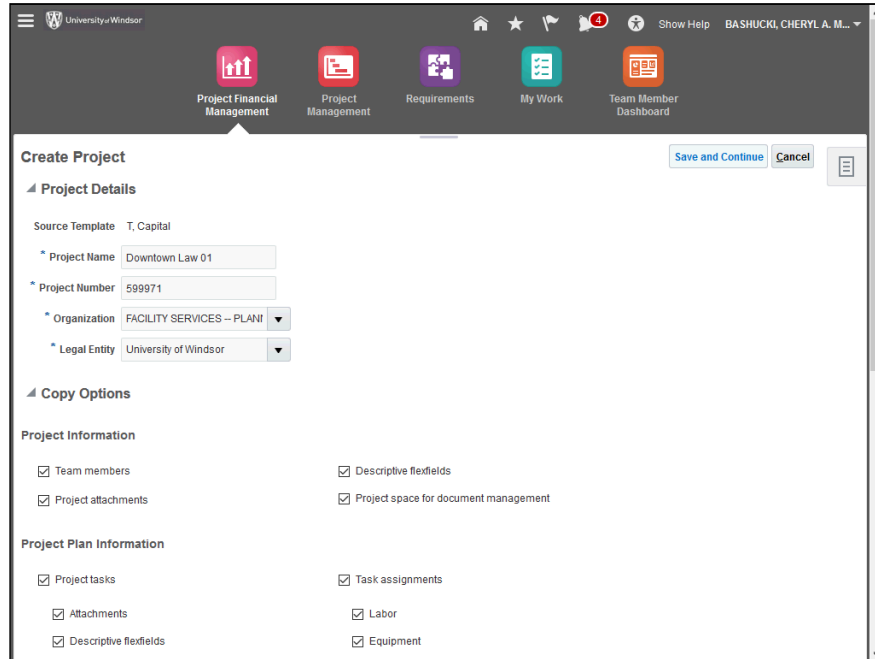
Step	Action
7.	Enter the required information in the <b>Project Number</b> field.



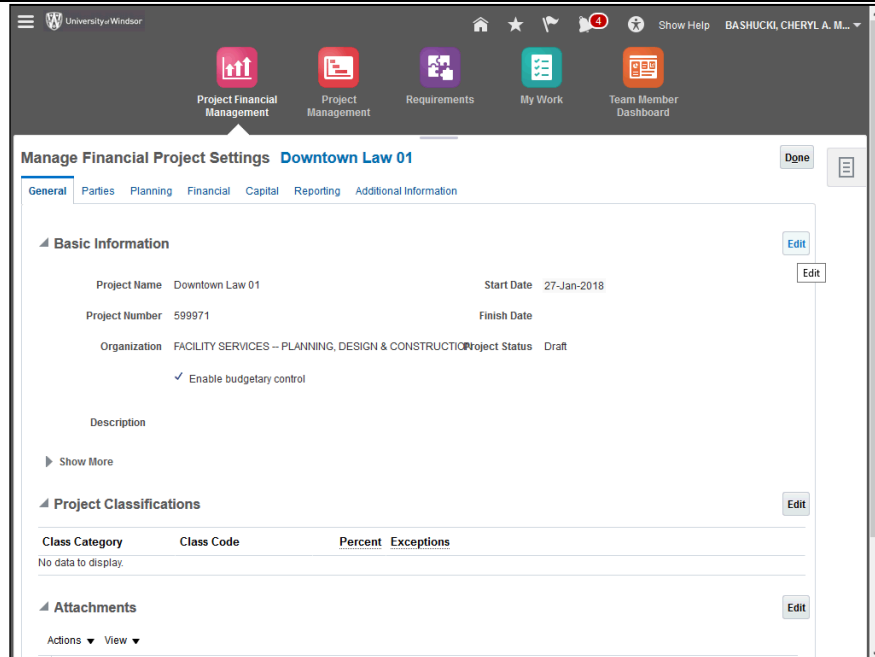
Step	Action
8.	Add a <b>Project start Date</b> at this step.



Step	Action
9.	Validate that all the <b>Copy Options</b> are selected.



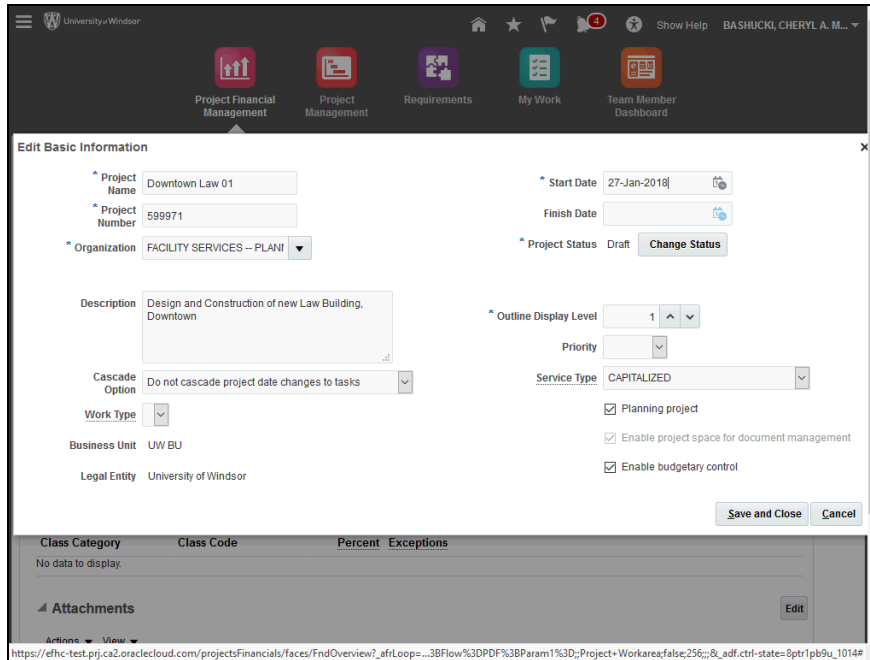
Step	Action
10.	Click the <b>Save and Continue</b> button.




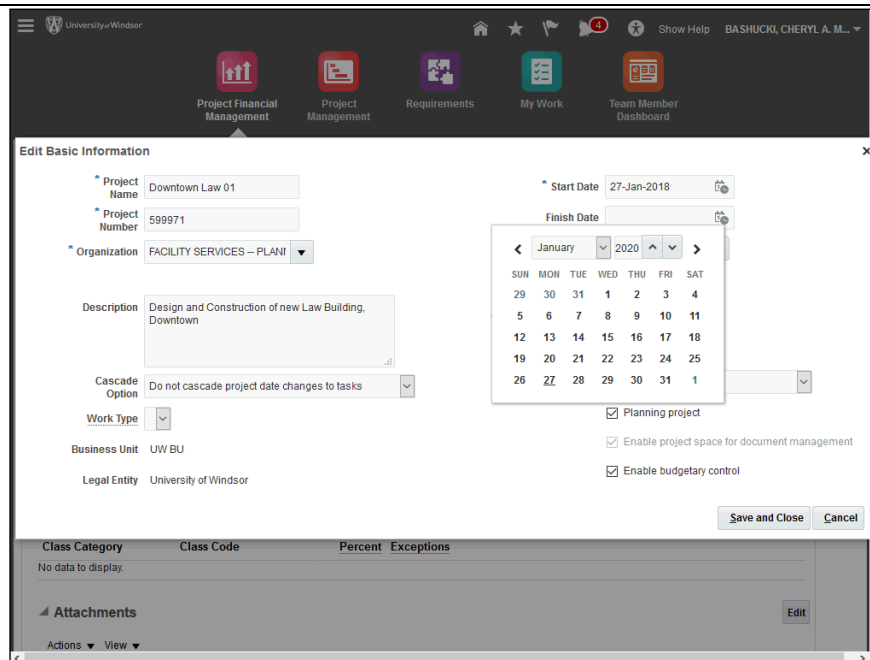
Step	Action
11.	Click the <b>Edit</b> button.

Step	Action
12.	Enter the required information in the <b>Description</b> field.

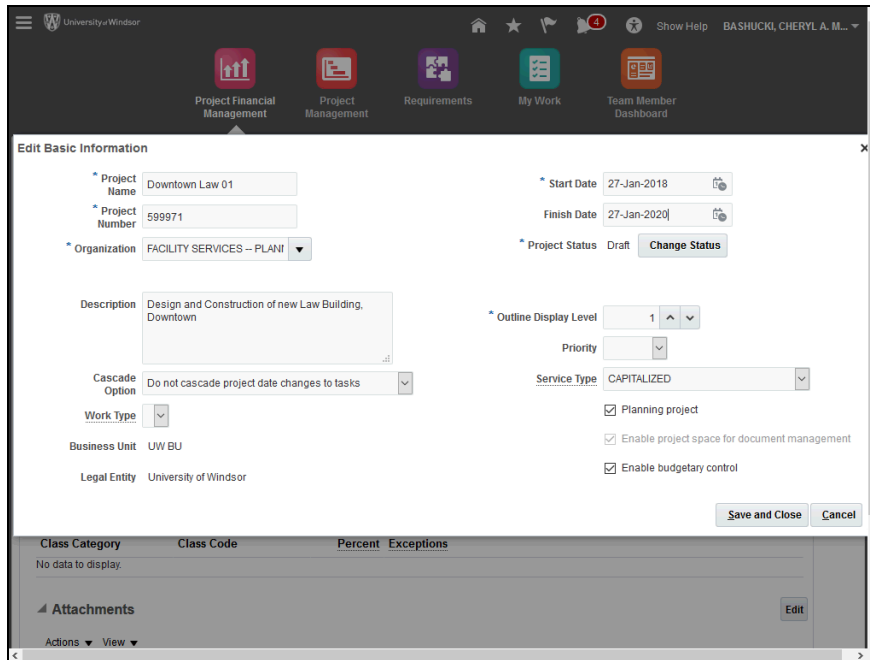
Step	Action
13.	Confirm that the <b>Start Date</b> is correct.




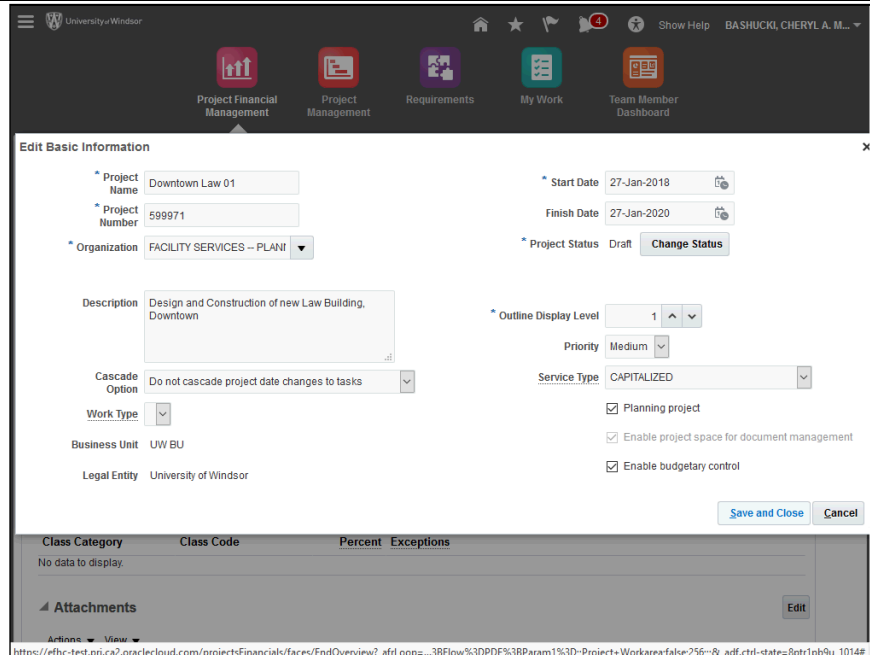
Step	Action
14.	Click the calendar icon for the <b>Finish Date</b> field. 




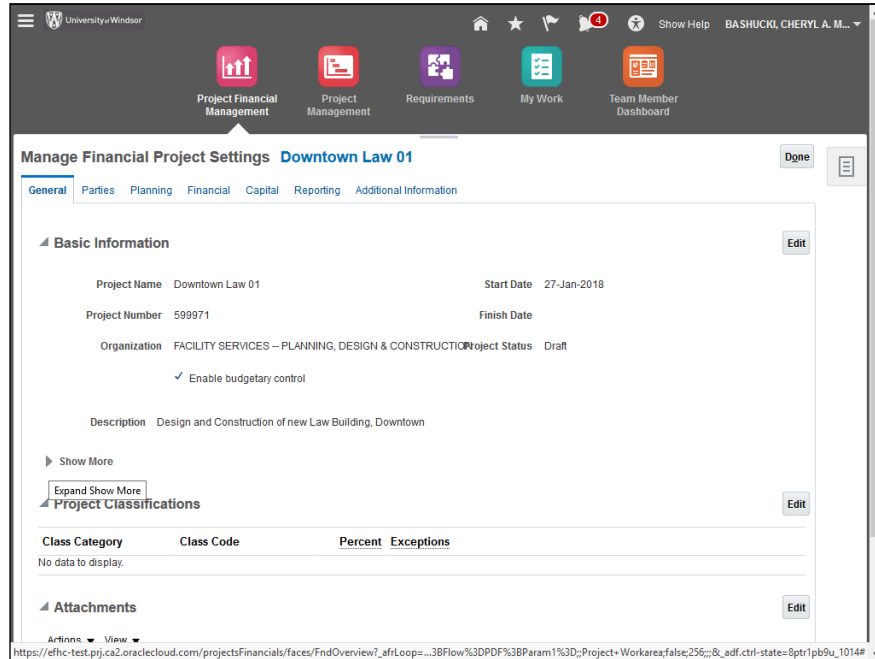
Step	Action
15.	Click to select the appropriate <b>Finish Date</b> from the calendar.



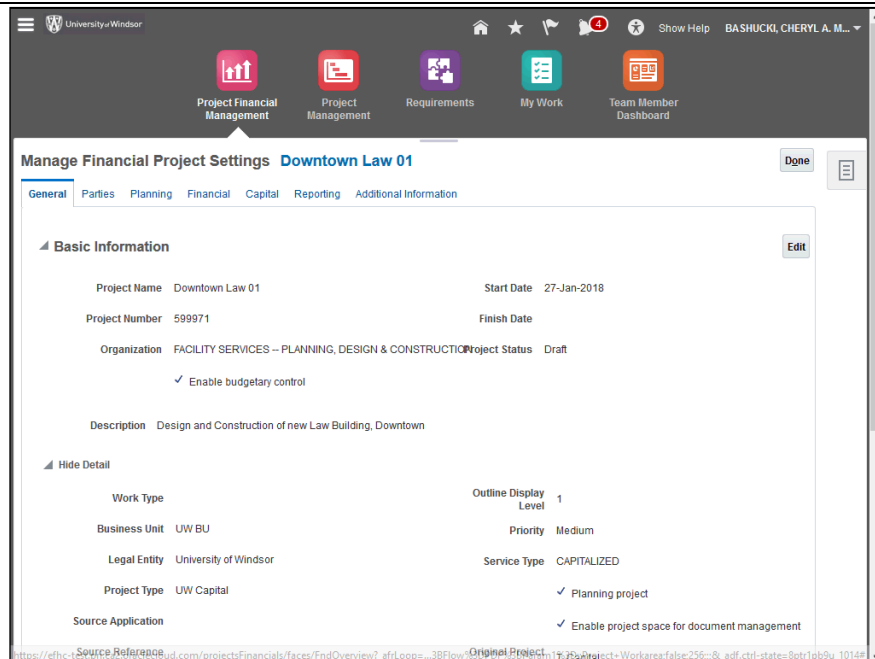
Step	Action
16.	<p>Click the <b>Priority</b> drop-down button.</p>  <p>Select the required option from the drop-down list.</p>



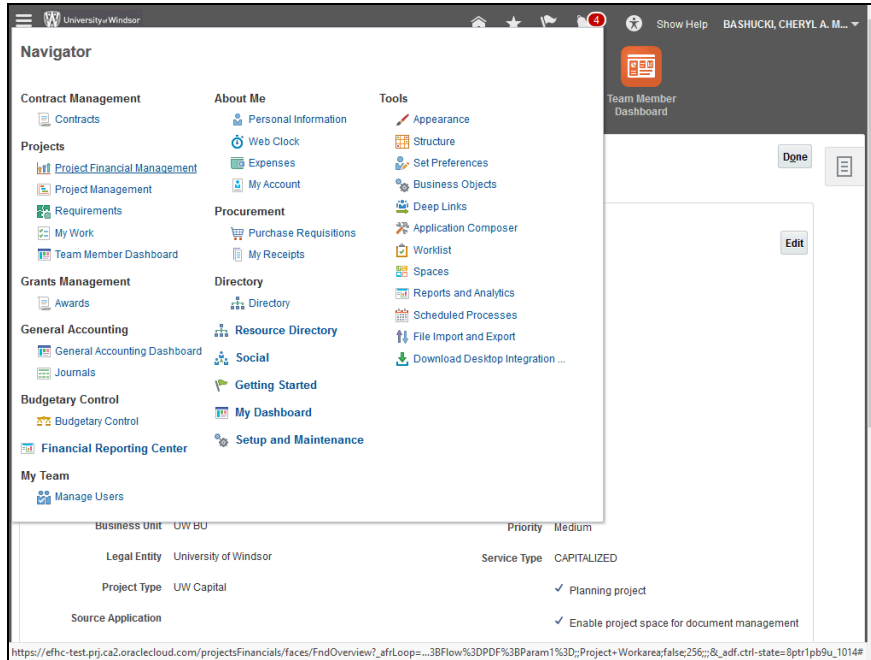
Step	Action
17.	<p>Click the <b>Save and Close</b> button.</p> 



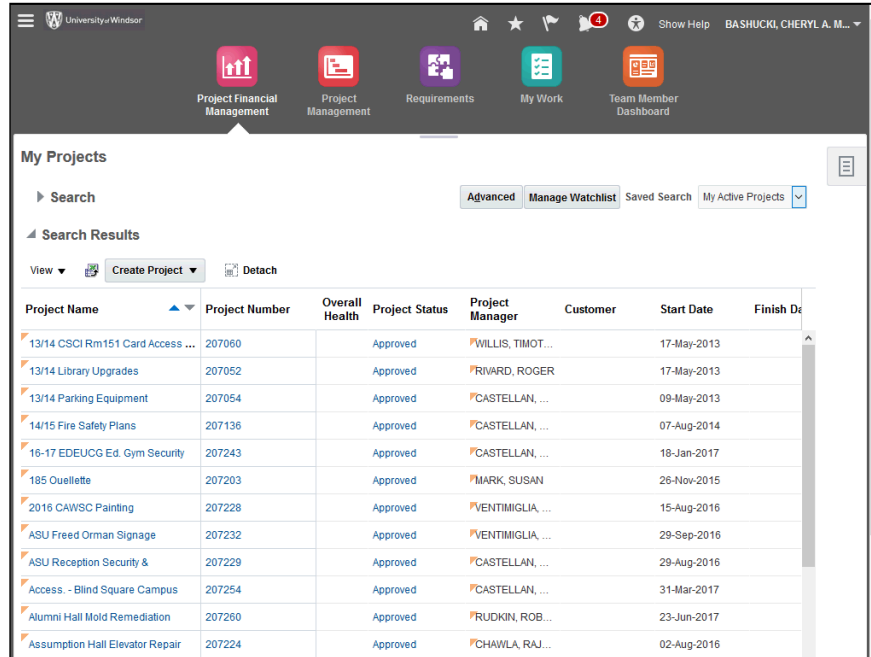
Step	Action
18.	Click the <b>Expand Show More</b> button.



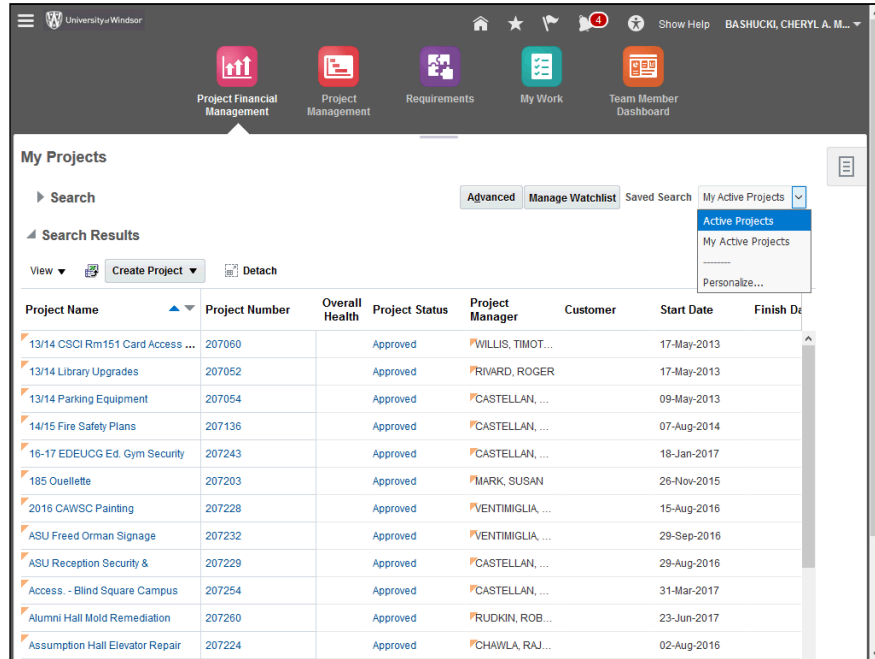
Step	Action
19.	Click the <b>Navigator</b> button.



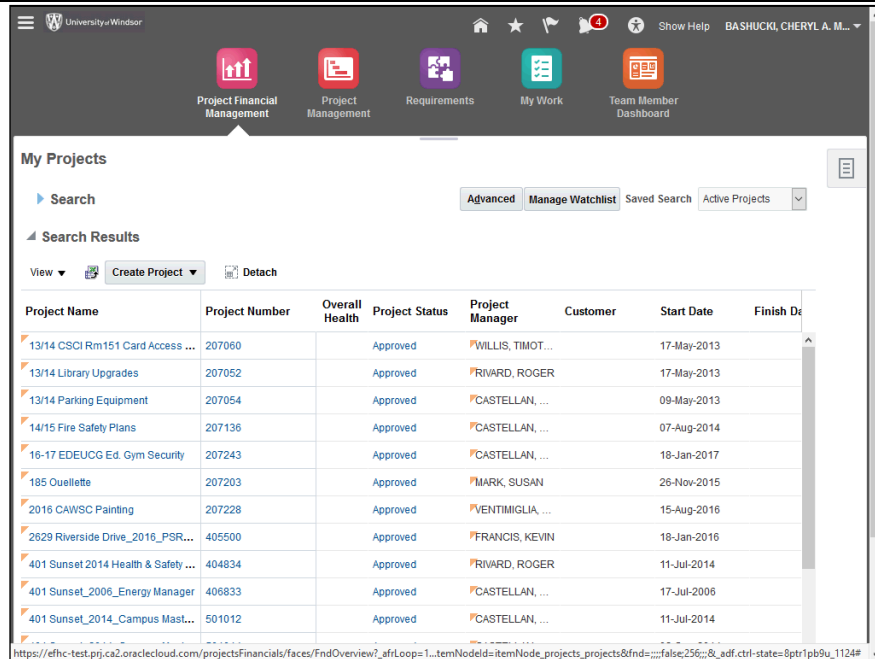
Step	Action
20.	Click the <b>Project Financial Management</b> link. <a href="#">Project Financial Management</a>



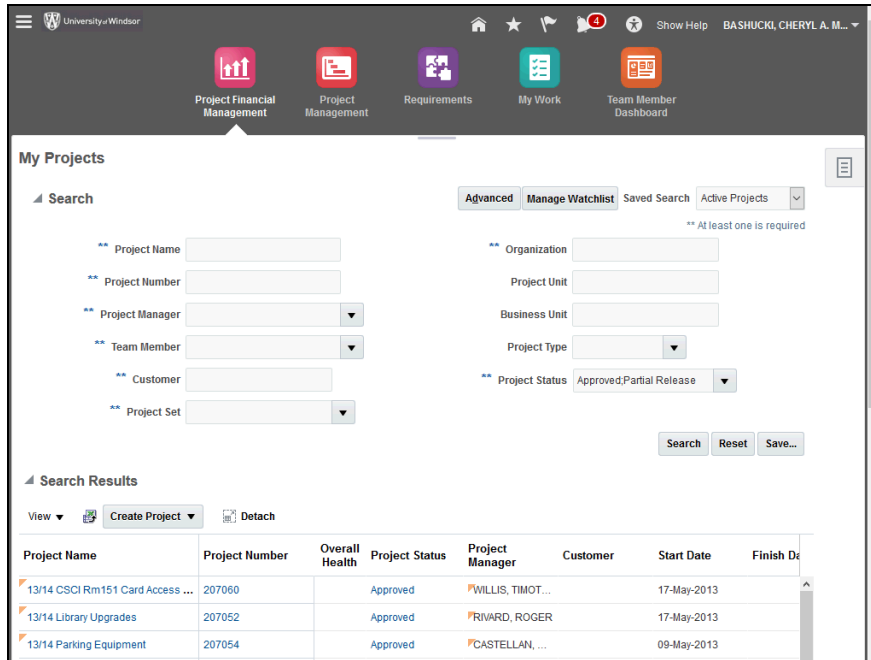
Step	Action
21.	Click the <b>Saved Search</b> drop-down button. ▼



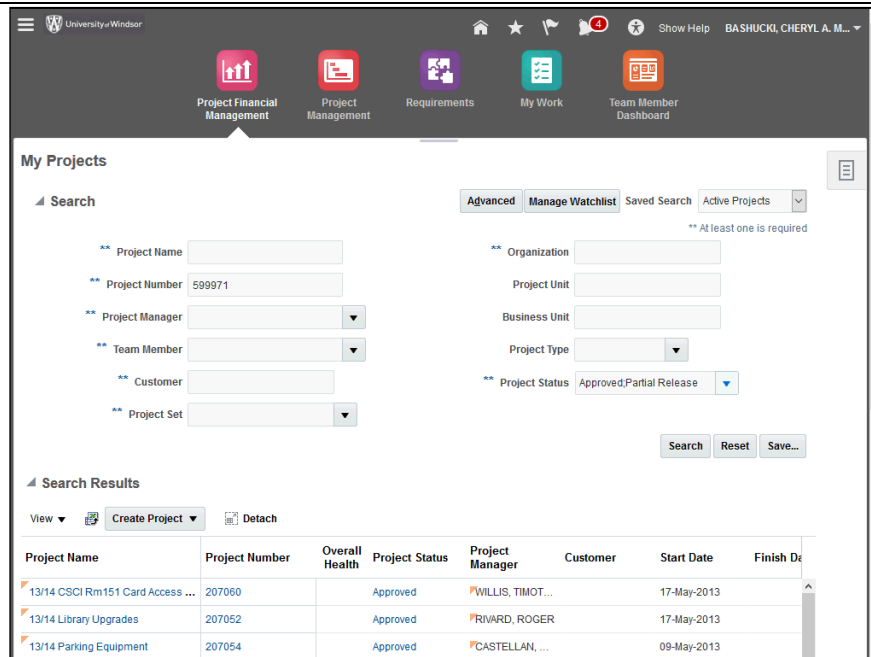
Step	Action
22.	Select <b>Active Projects</b> option from the drop-down list.



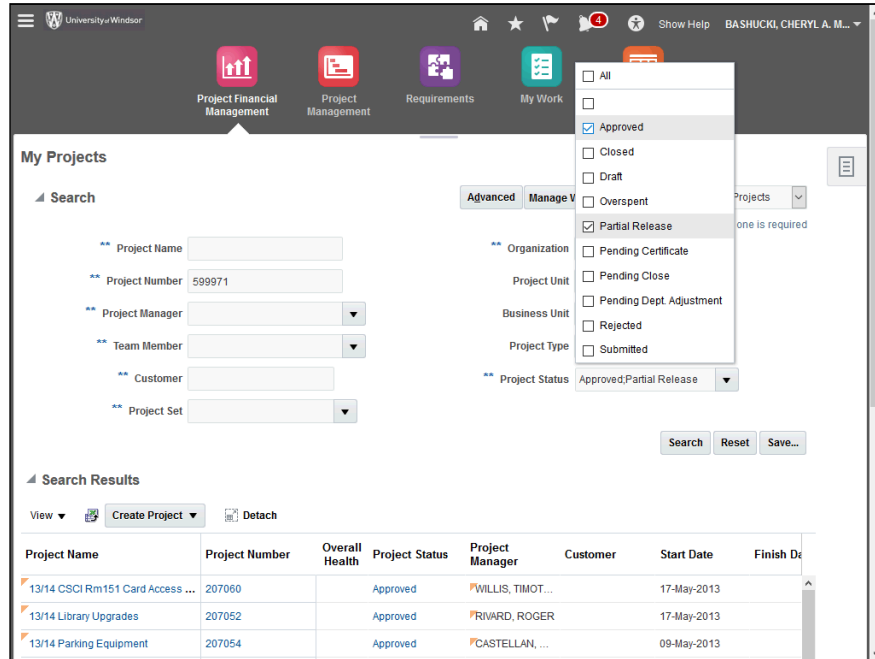
Step	Action
23.	Click the <b>Expand Search</b> button.



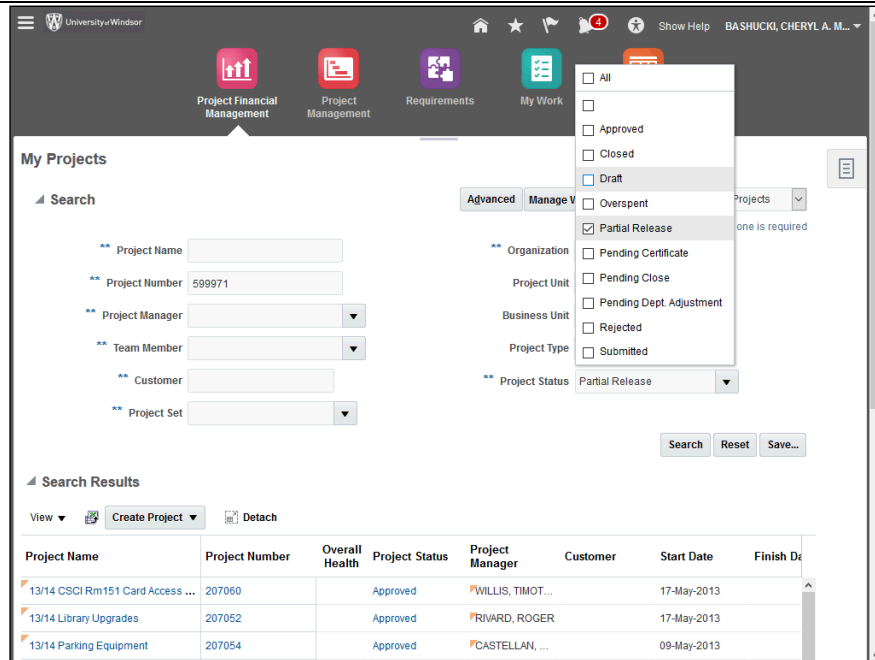
Step	Action
24.	Enter the required information in the <b>Project Number</b> field.



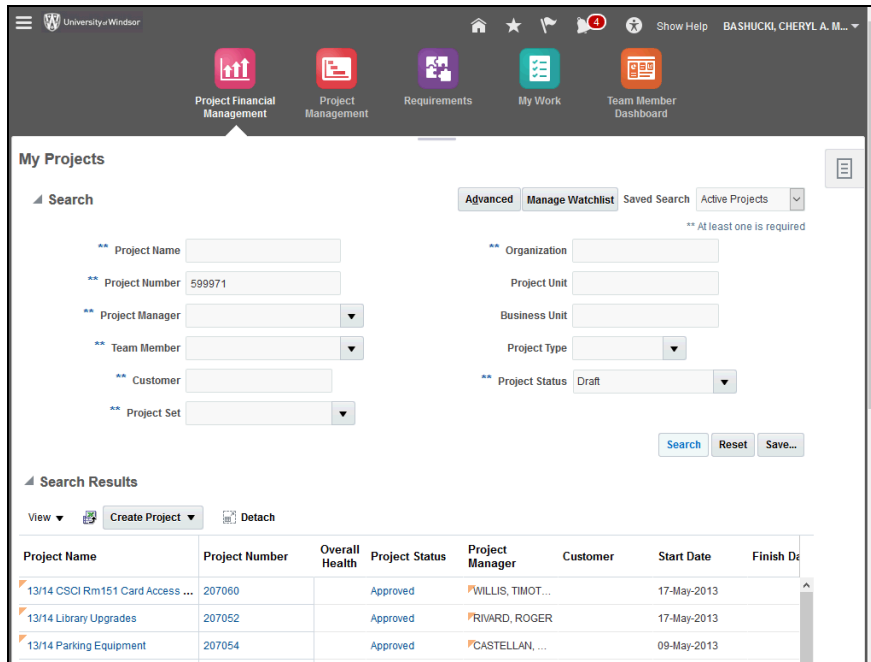
Step	Action
25.	Click the <b>Project Status</b> drop-down button.



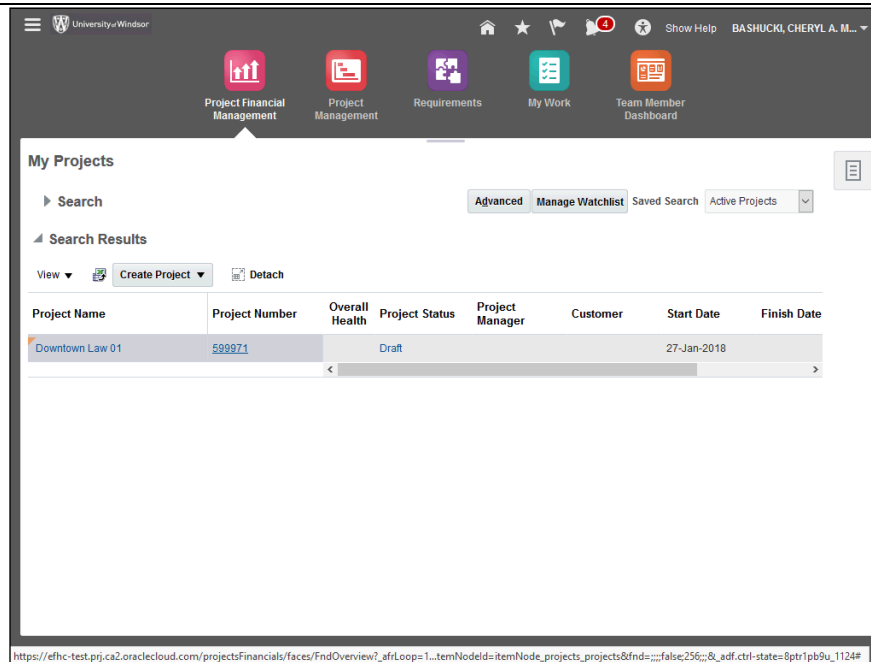
Step	Action
26.	Deselect the <b>Approved</b> and the <b>Partial Release</b> option.



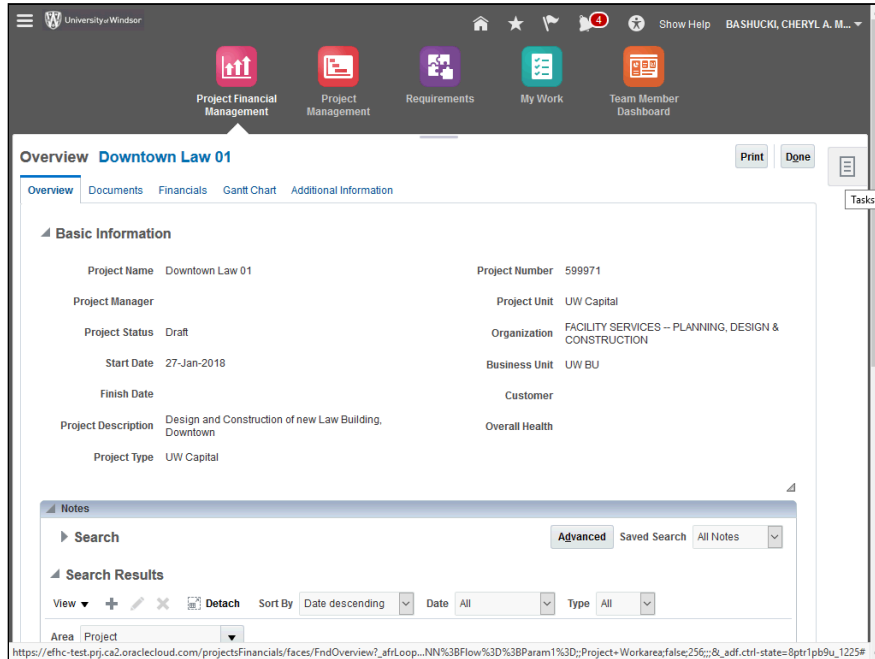
Step	Action
27.	Select the <b>Draft</b> option.



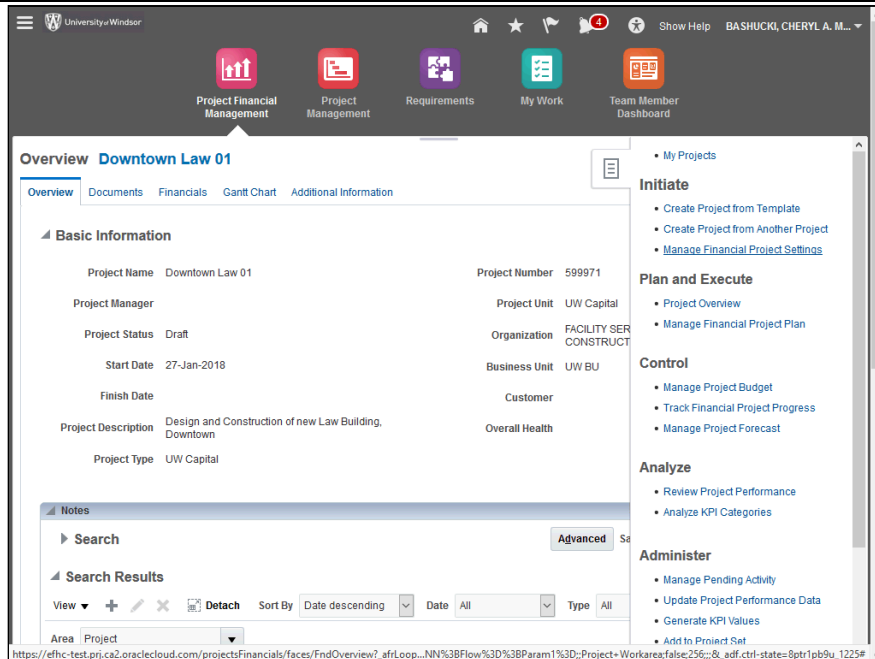
Step	Action
28.	Click the <b>Search</b> button.



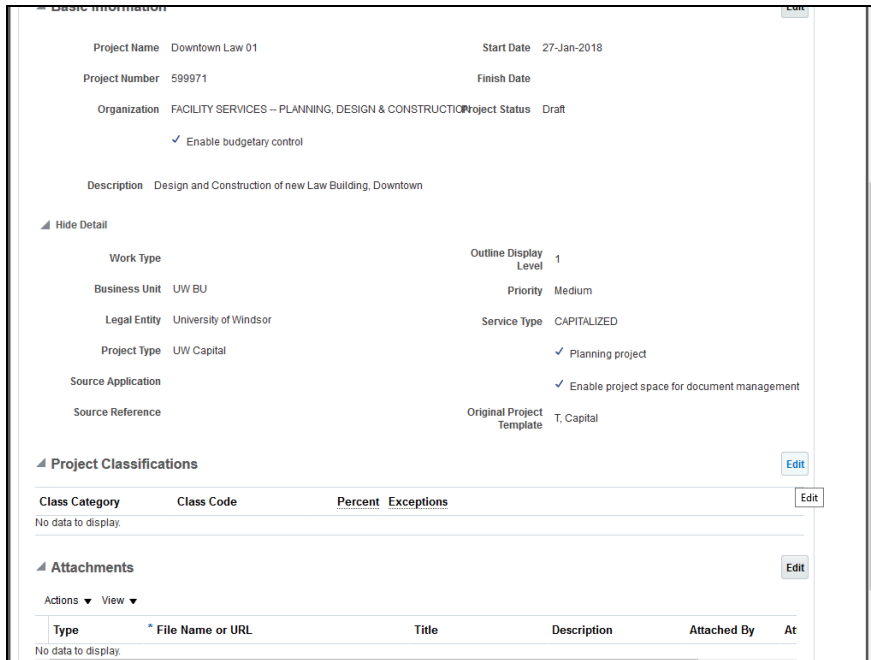
Step	Action
29.	Click the <b>Required Project</b> link.



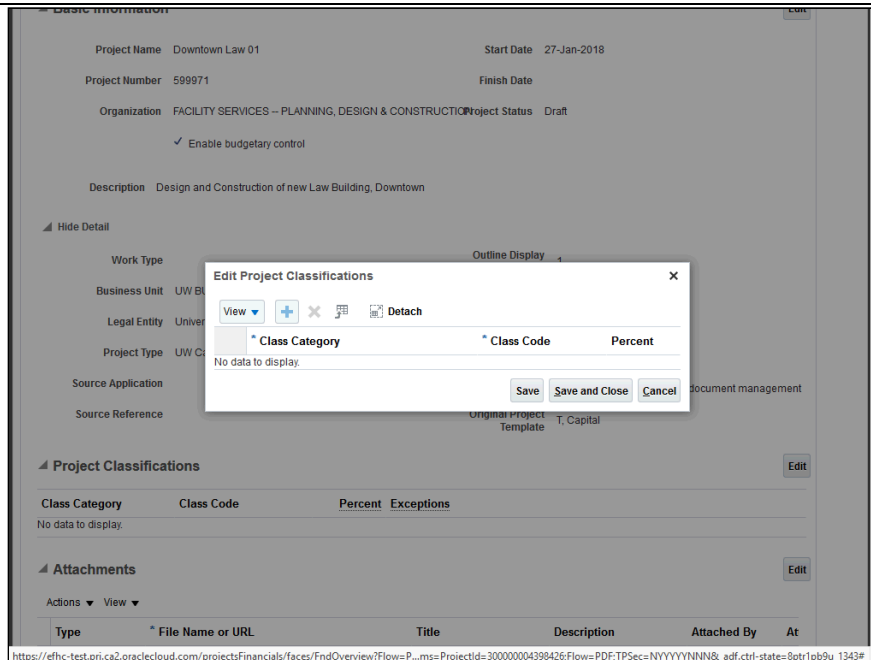
Step	Action
30.	Click the <b>Tasks</b> button.



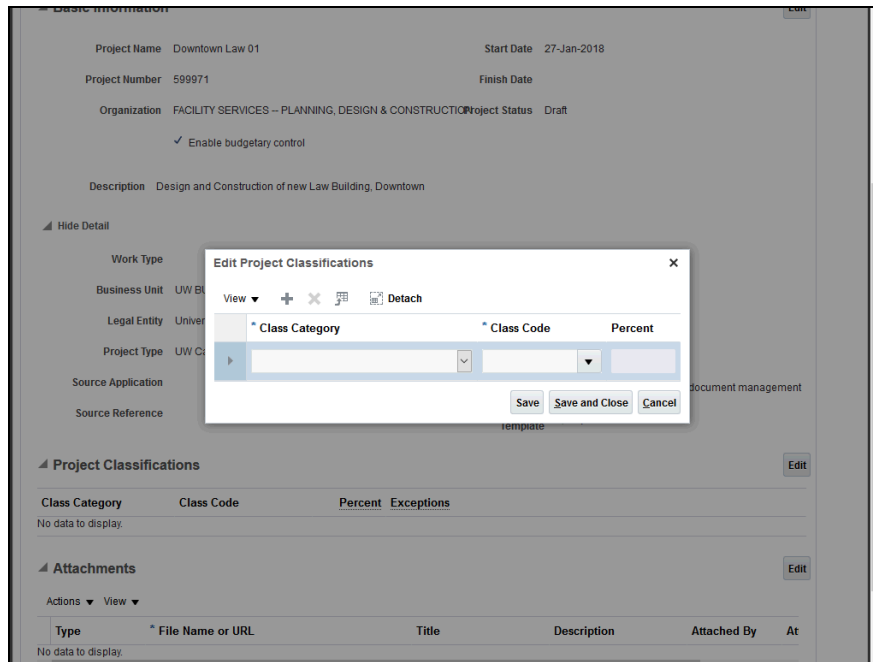
Step	Action
31.	Click the <b>Manage Financial Project Settings</b> link.



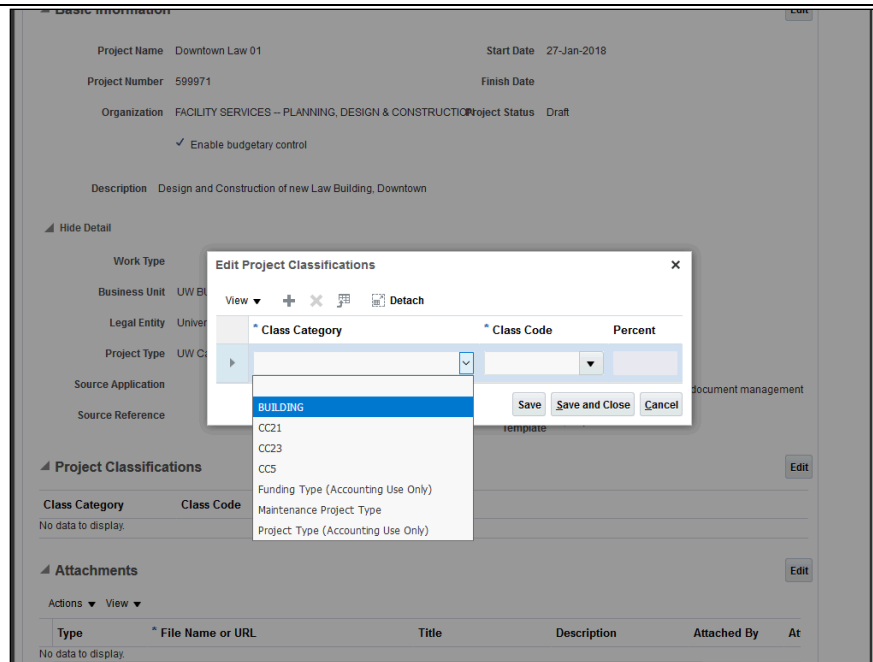
Step	Action
32.	Click the <b>Edit</b> button.



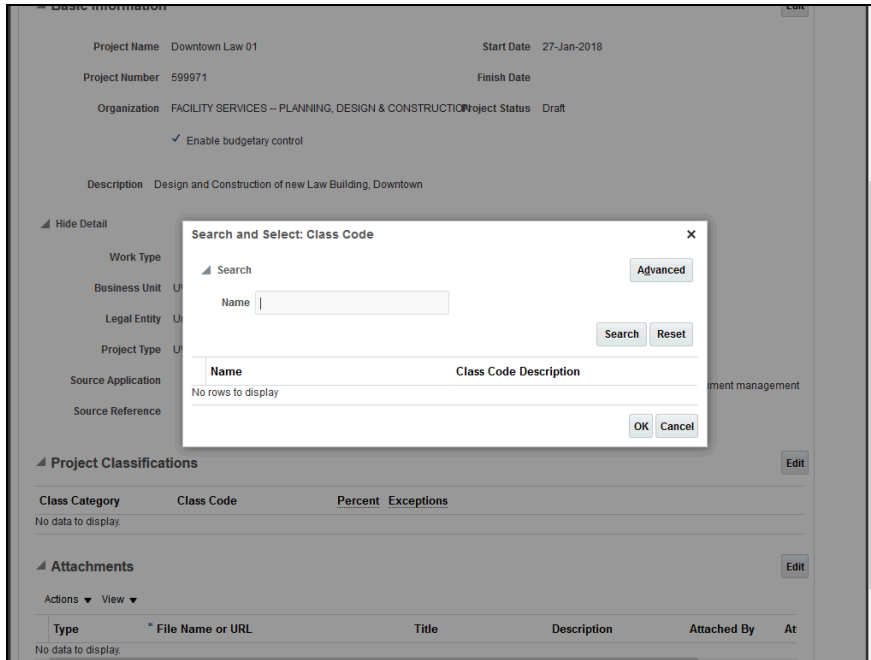
Step	Action
33.	Click the <b>Add</b> button.



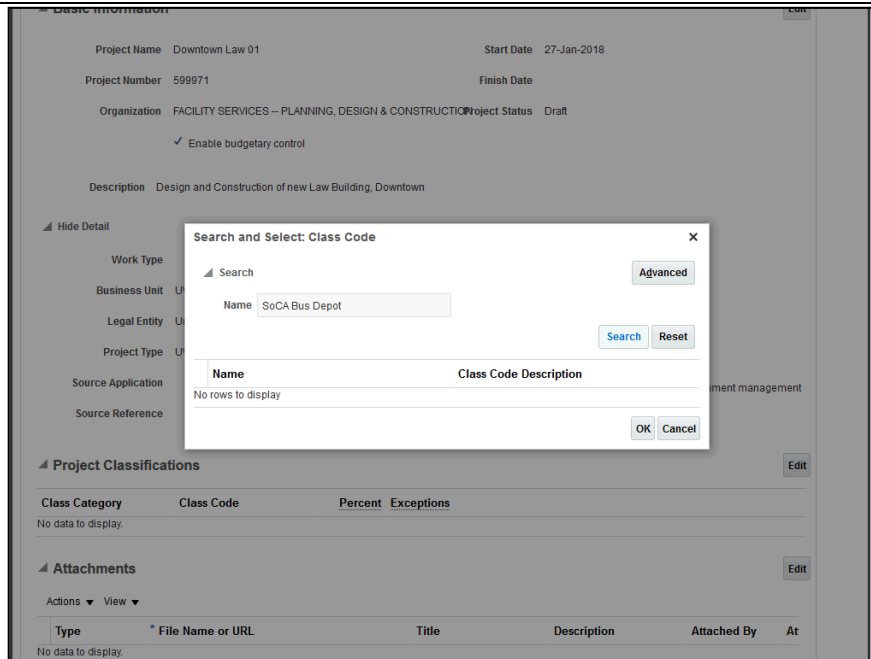
Step	Action
34.	Click the <b>Class Category</b> drop-down button. Select the appropriate option from the drop-down list.



Step	Action
35.	Click the <b>Class Code</b> drop-down button. Select the required option from the drop-down list.

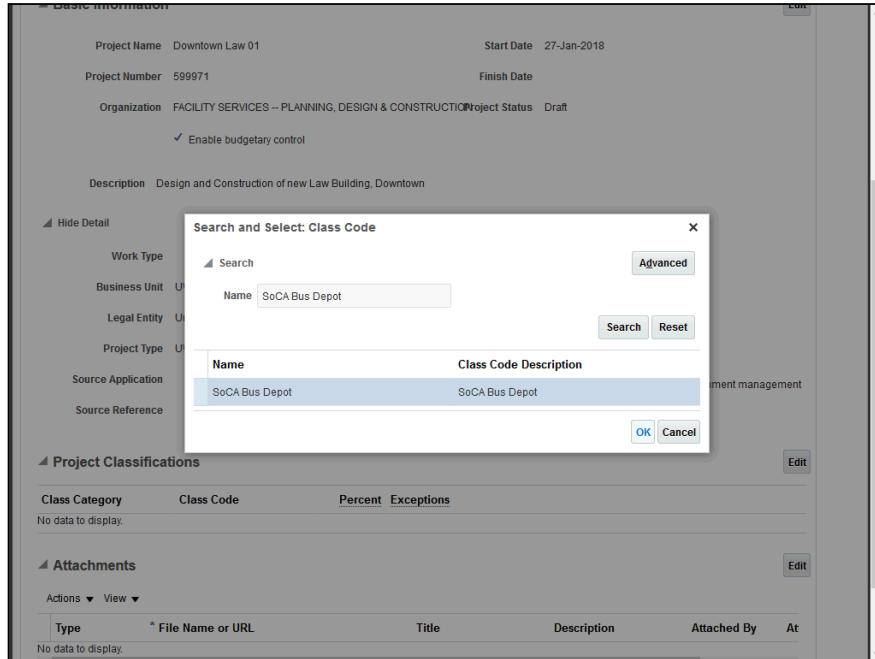


Step	Action
36.	Enter the required information in the <b>Name</b> field.

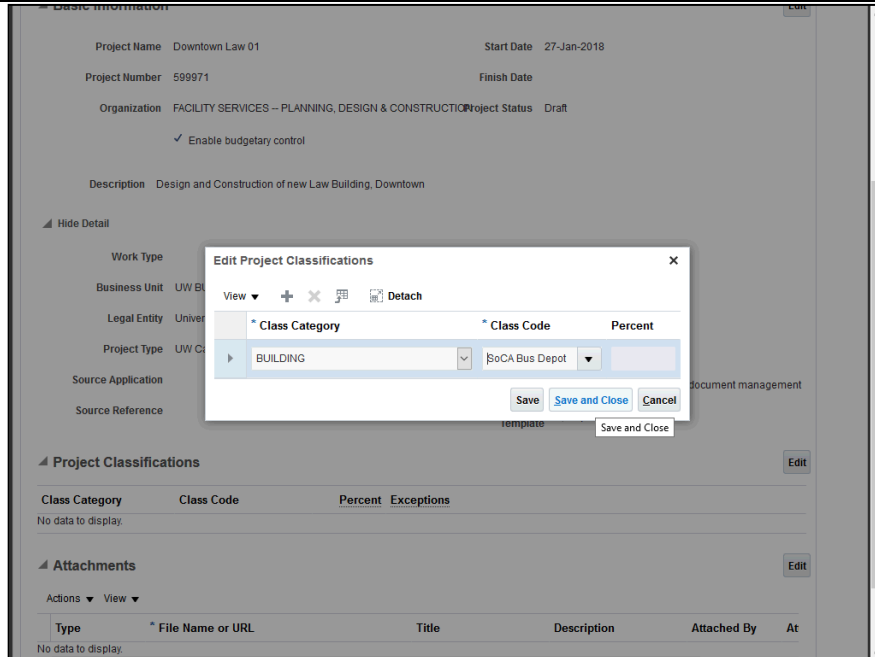


Step	Action
37.	Click the <b>Search</b> button.

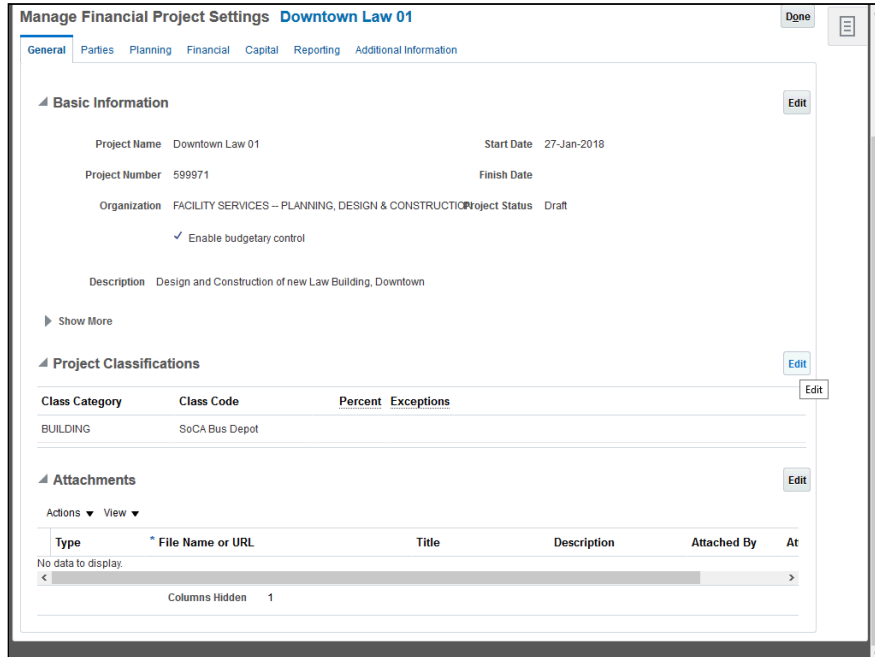




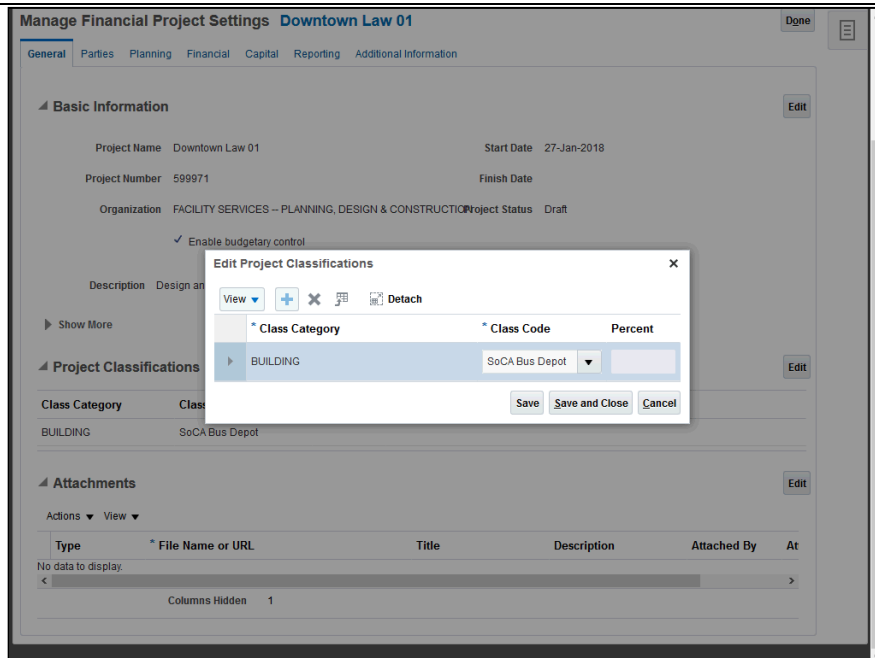
Step	Action
38.	Click the <b>OK</b> button.



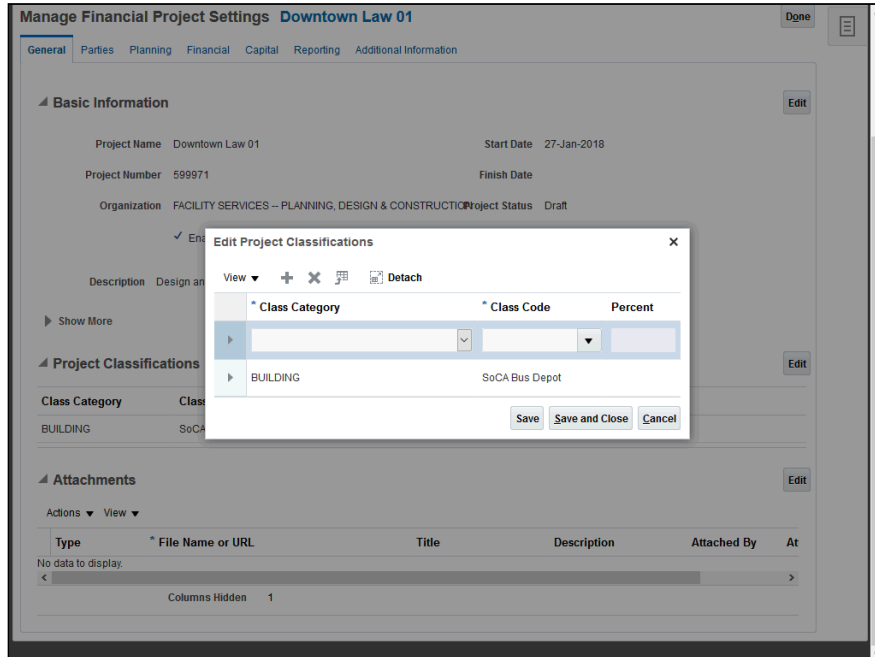
Step	Action
39.	Click the <b>Save and Close</b> button.



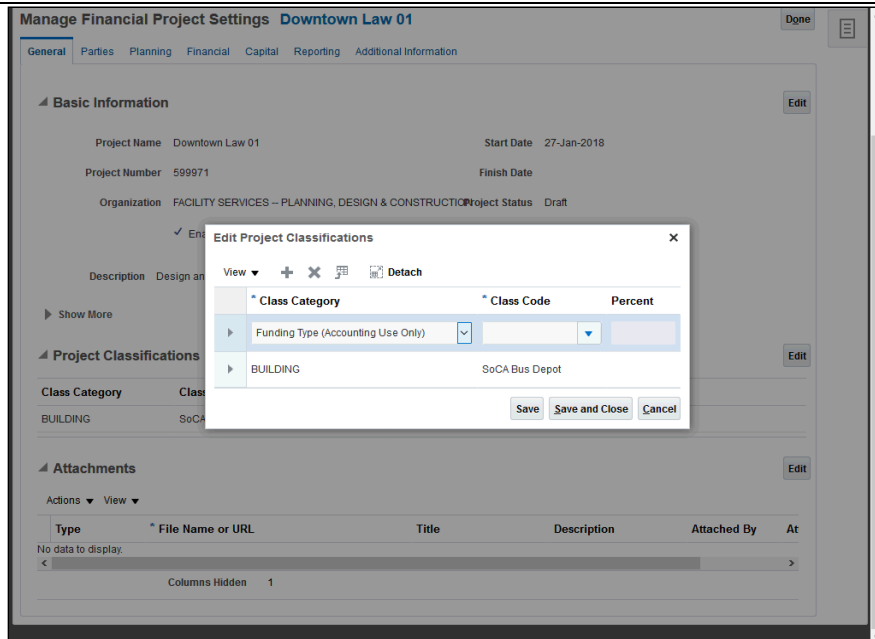
Step	Action
40.	Click the <b>Edit</b> button.



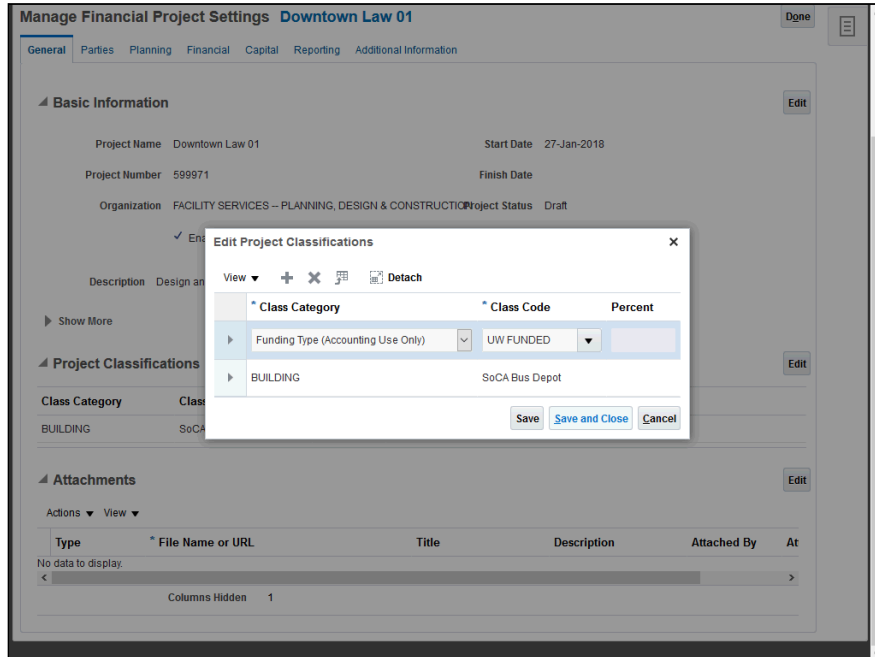
Step	Action
41.	Click the <b>Add</b> button.



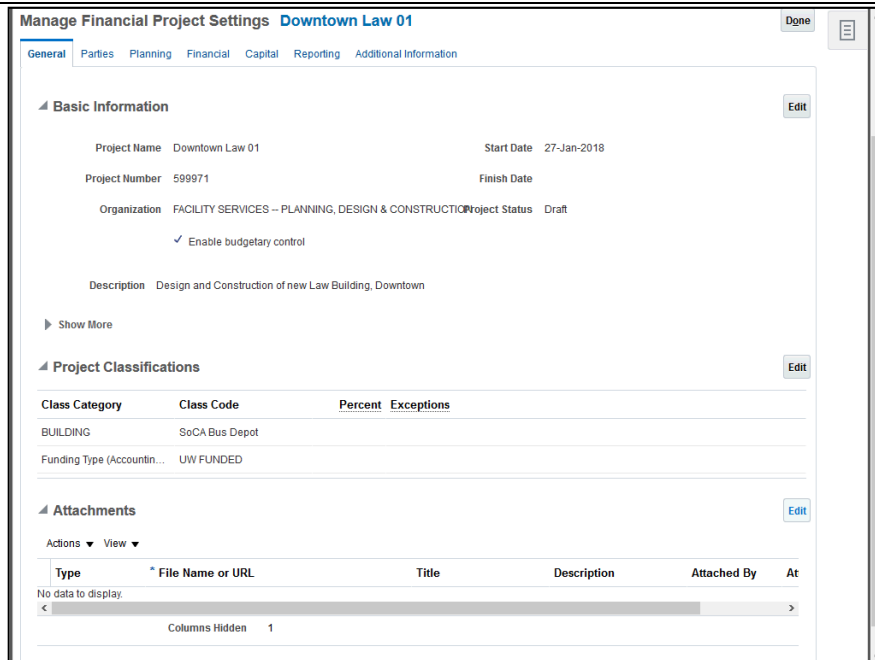
Step	Action
42.	Click the <b>Class Category</b> drop-down button. Select the required option from the drop-down list.



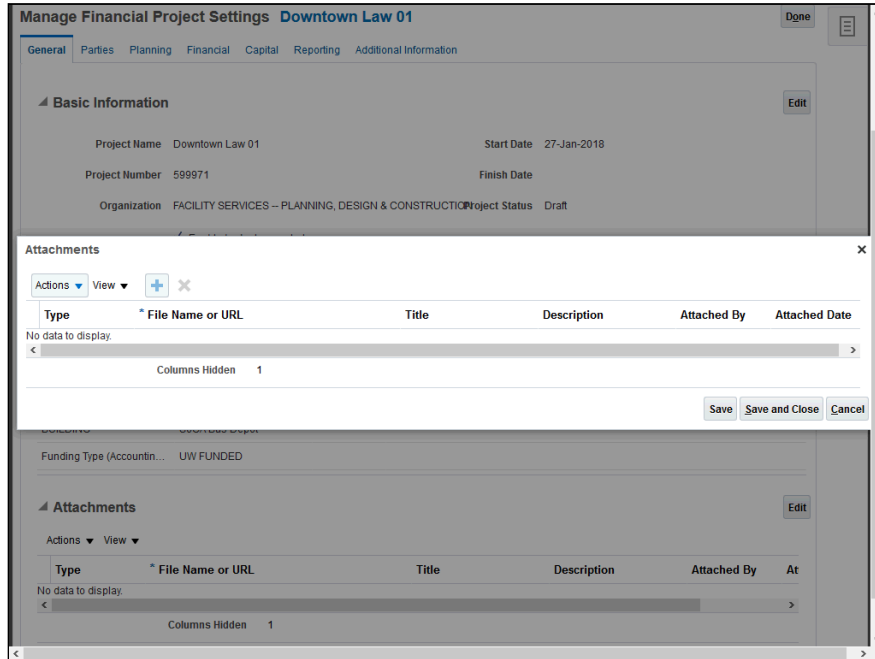
Step	Action
43.	Click the <b>Class Code</b> drop-down button. Select the required option from the drop-down list.



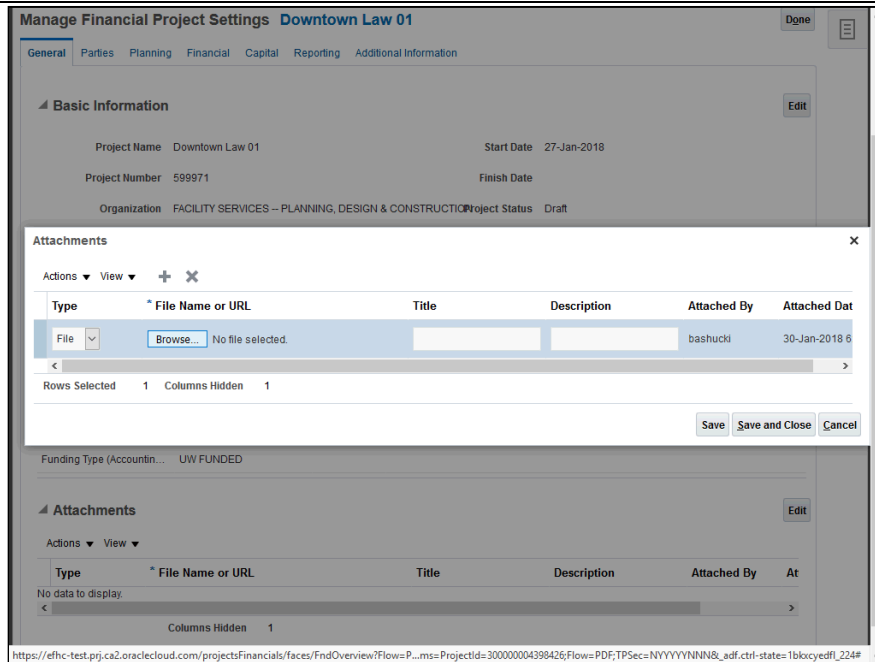
Step	Action
44.	Click the <b>Save and Close</b> button. <a href="#">Save and Close</a>



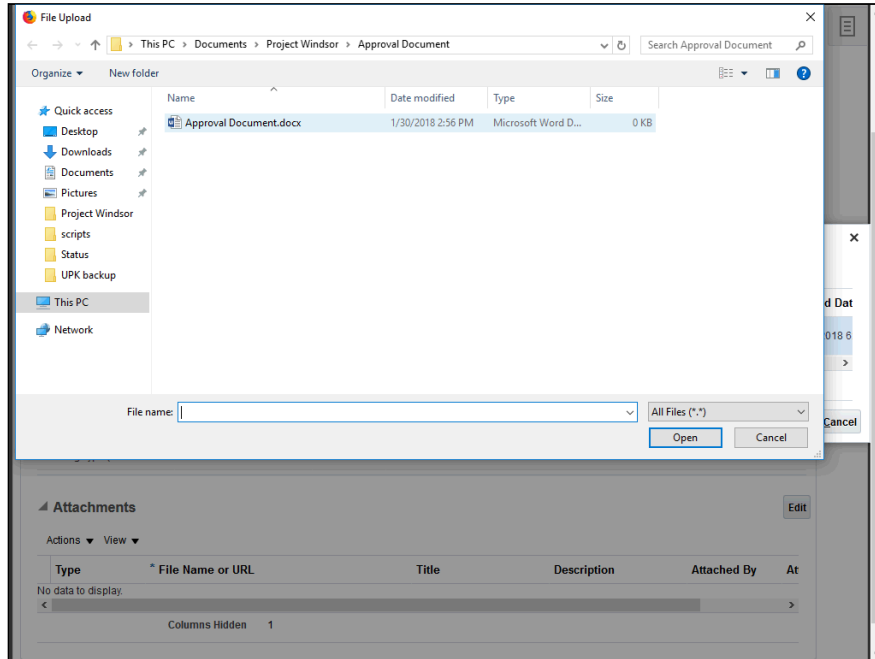
Step	Action
45.	Click the <b>Edit</b> button. <a href="#">Edit</a>



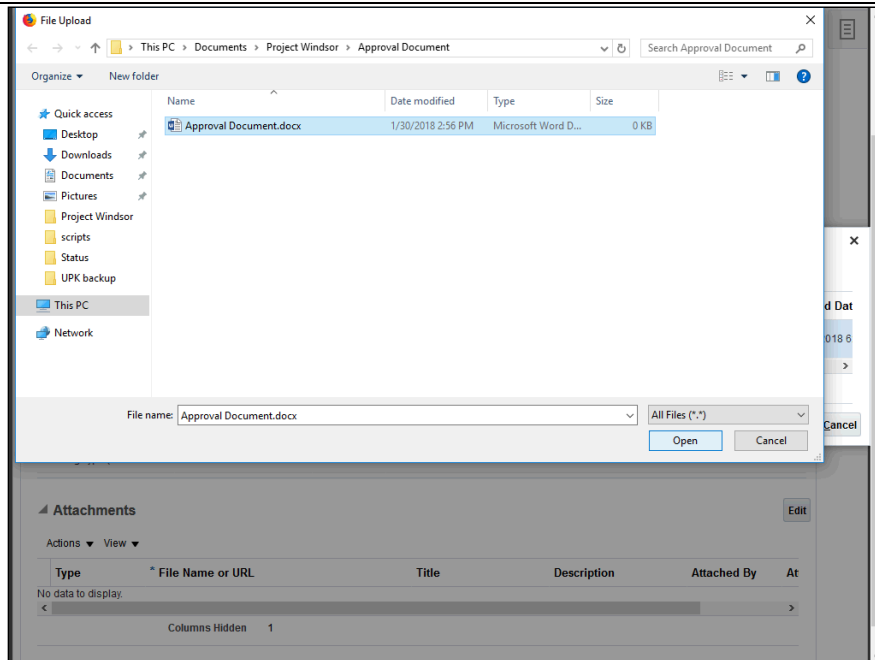
Step	Action
46.	Click the <b>Add</b> button.



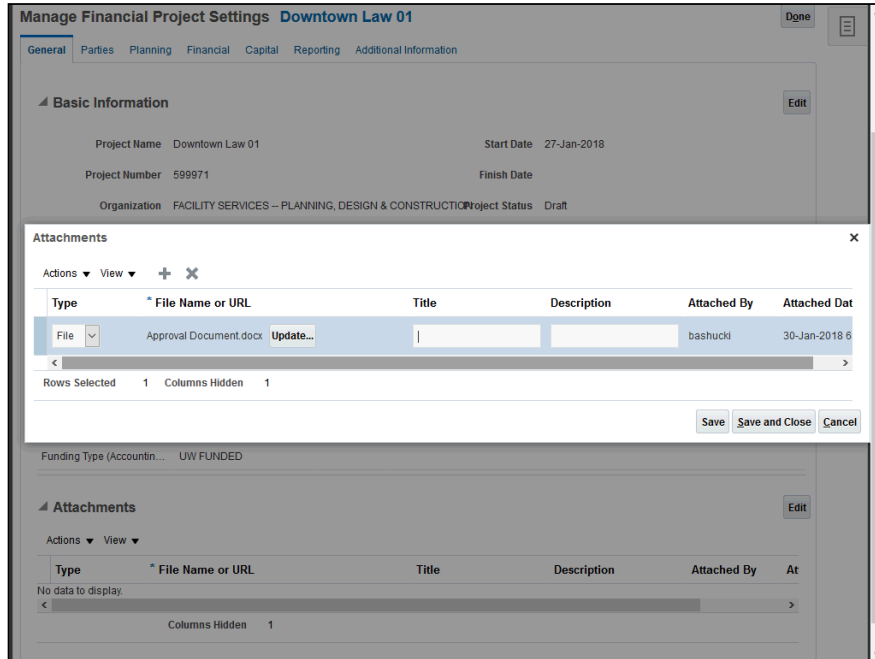
Step	Action
47.	Click the <b>Browse...</b> button.



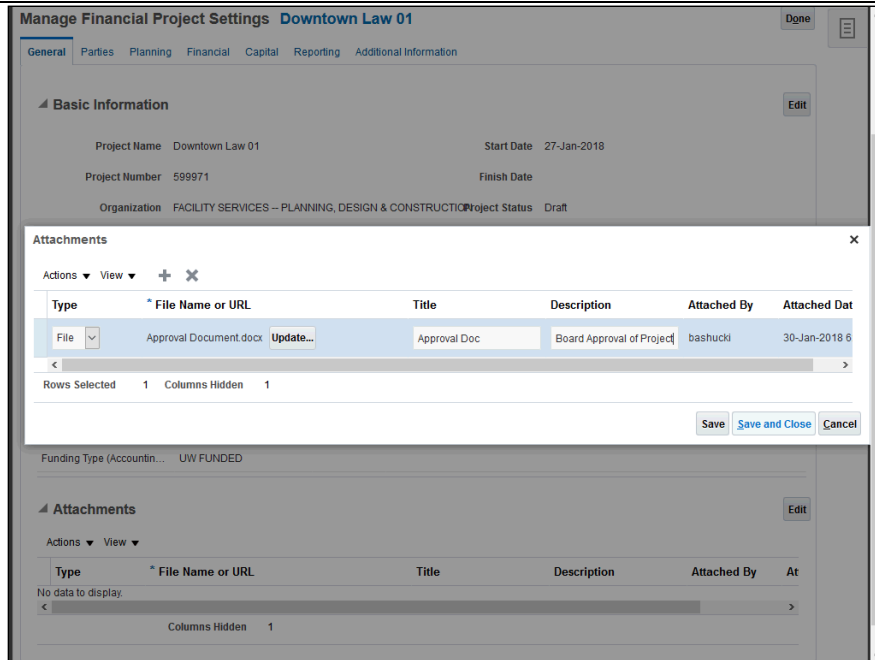
Step	Action
48.	Click the required <b>Document</b> to select. <b>Approval Document.docx</b>



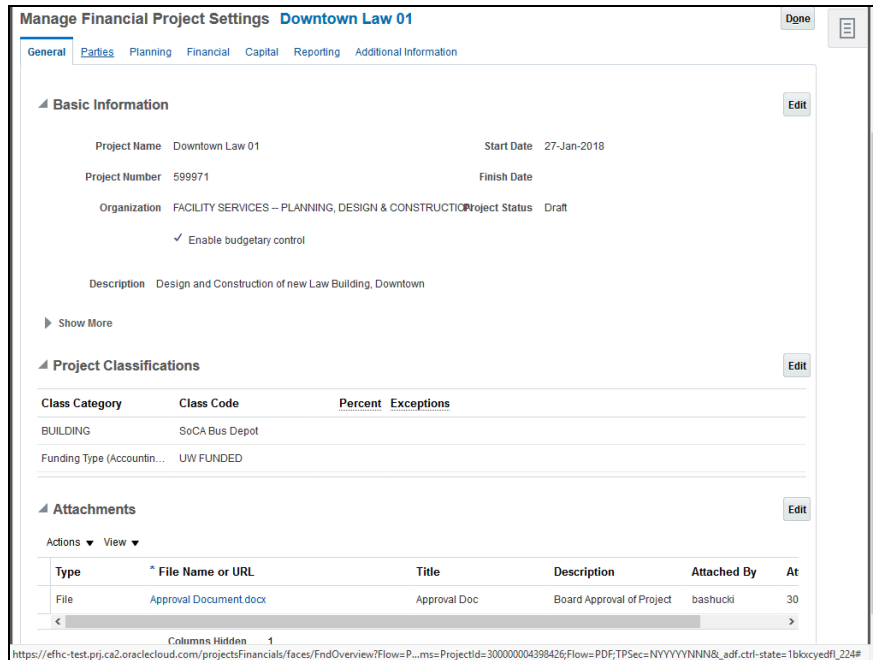
Step	Action
49.	Click the <b>Open</b> button. <b>Open</b>



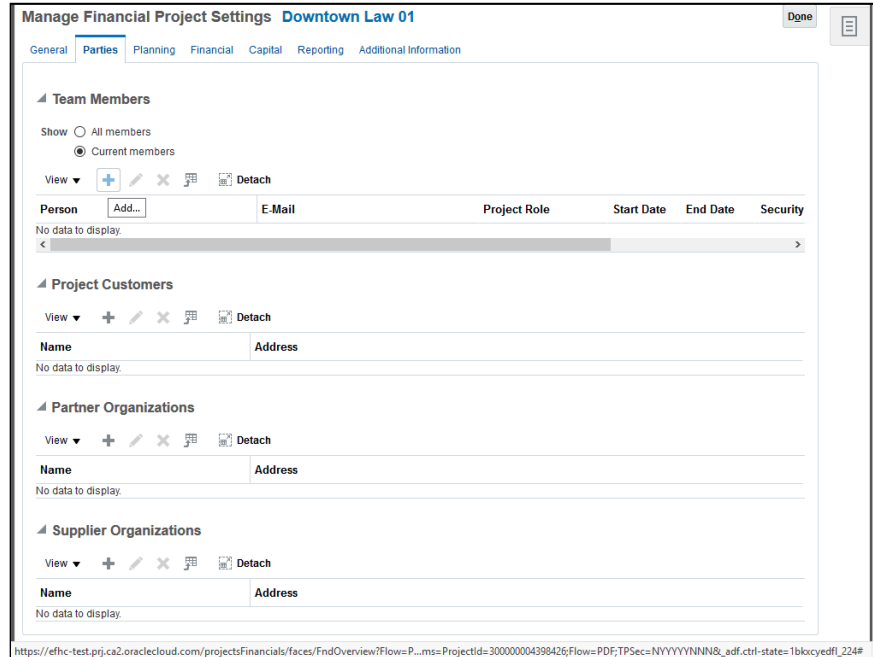
Step	Action
50.	Enter the required information in the <b>Title</b> field.




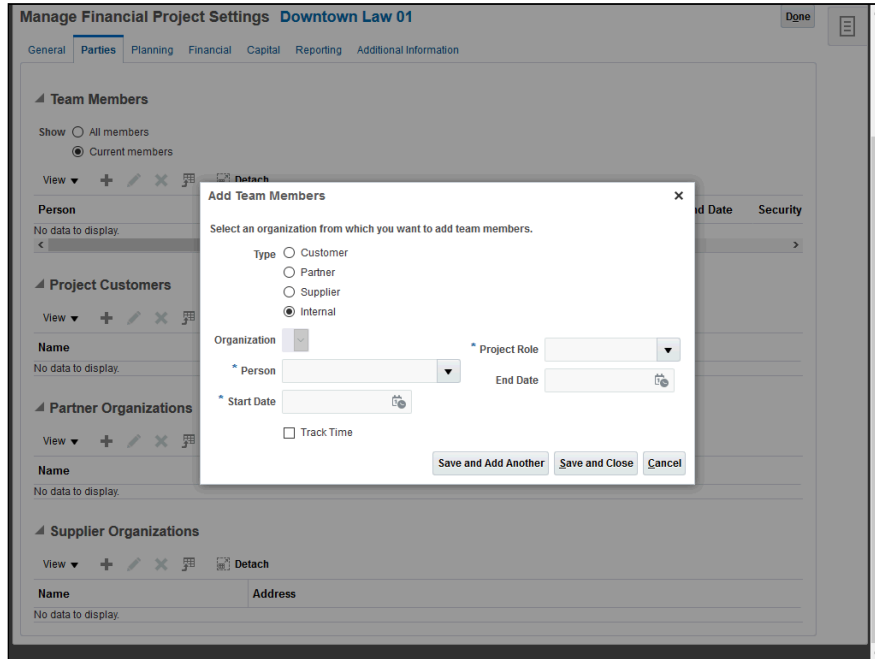
Step	Action
51.	Click the <b>Save and Close</b> button. <a href="#">Save and Close</a>



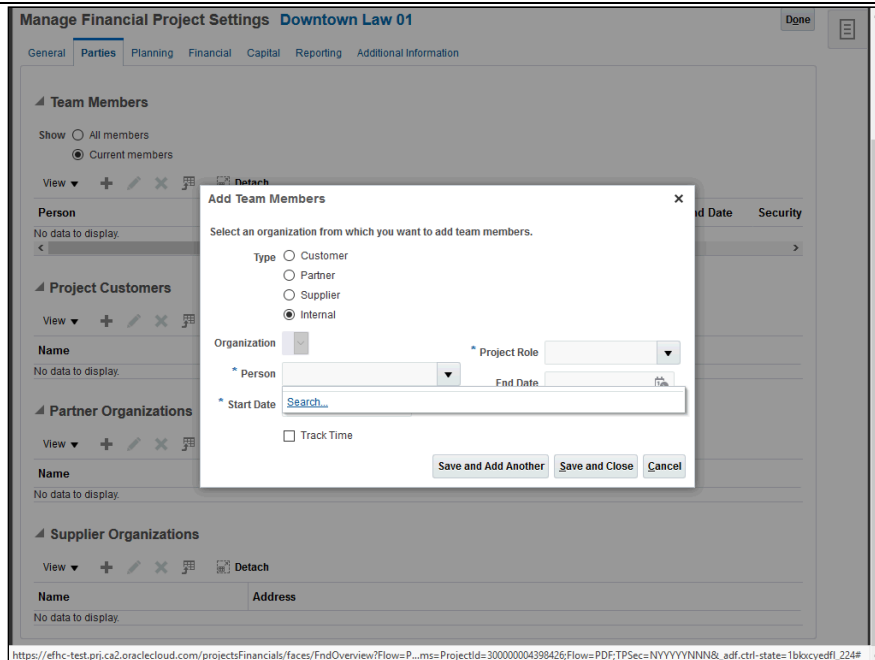
Step	Action
52.	Click the <b>Parties</b> link. <a href="#">Parties</a>



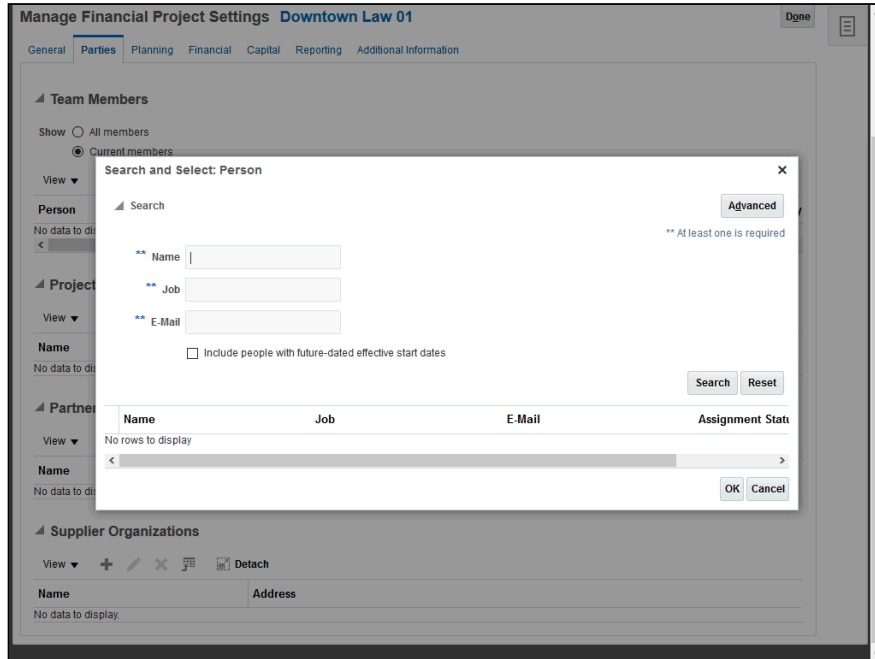
Step	Action
53.	Click the <b>Add</b> button. 



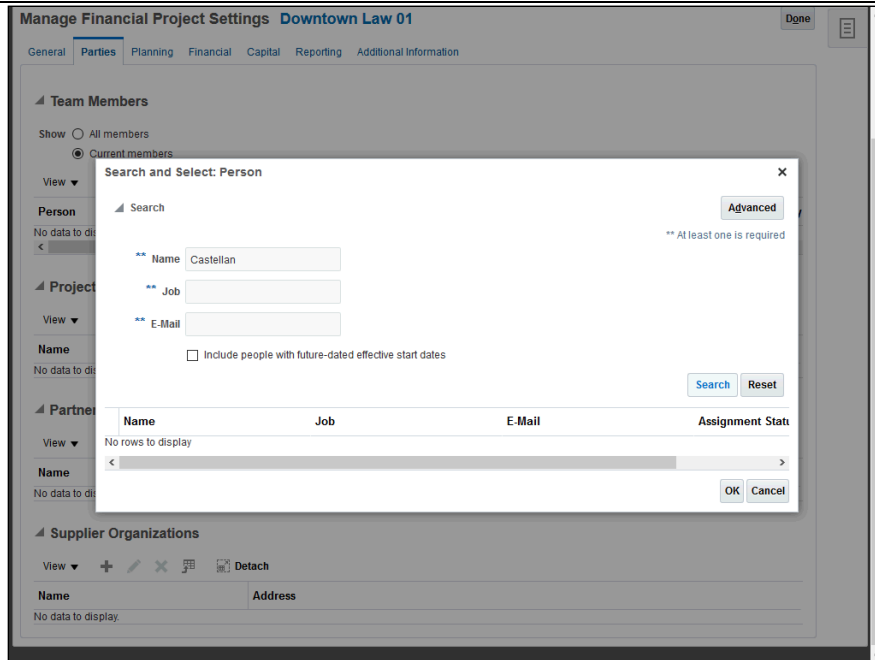
Step	Action
54.	Click the <b>Person</b> drop-down button.



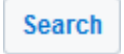
Step	Action
55.	Click the <b>Search...</b> link.

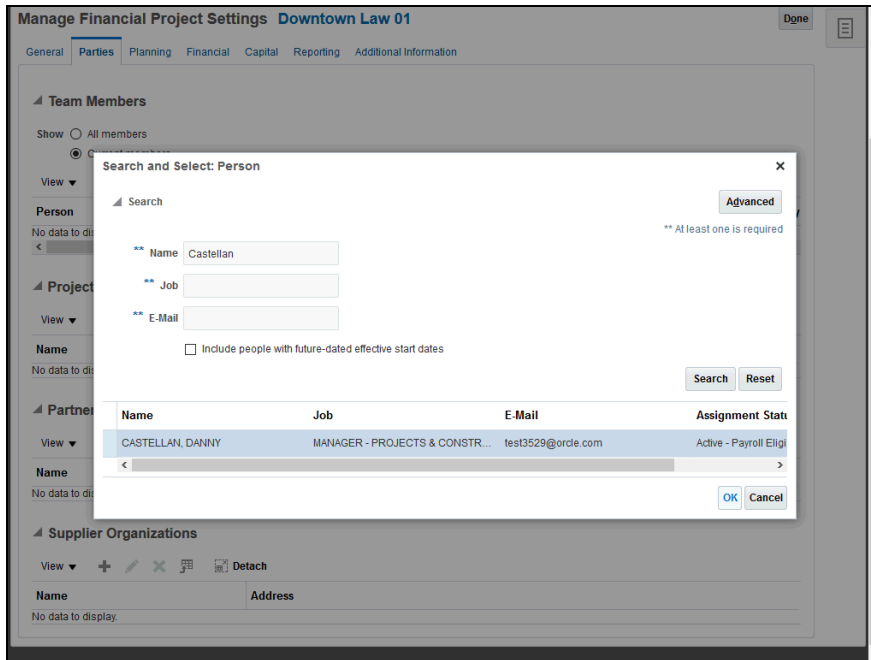


Step	Action
56.	Enter the required information in the <b>Name</b> field.

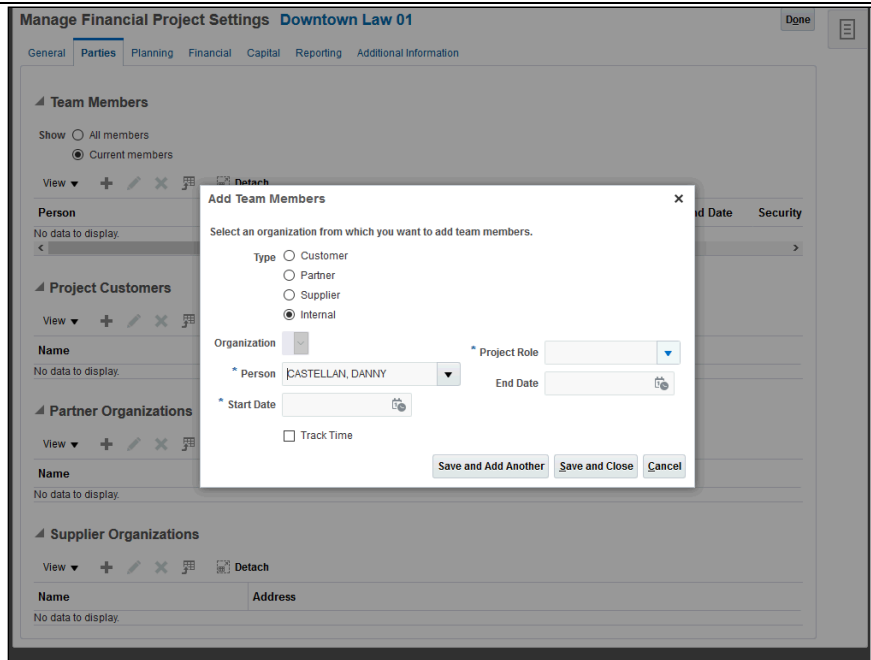


Step	Action
57.	Click the <b>Search</b> button.

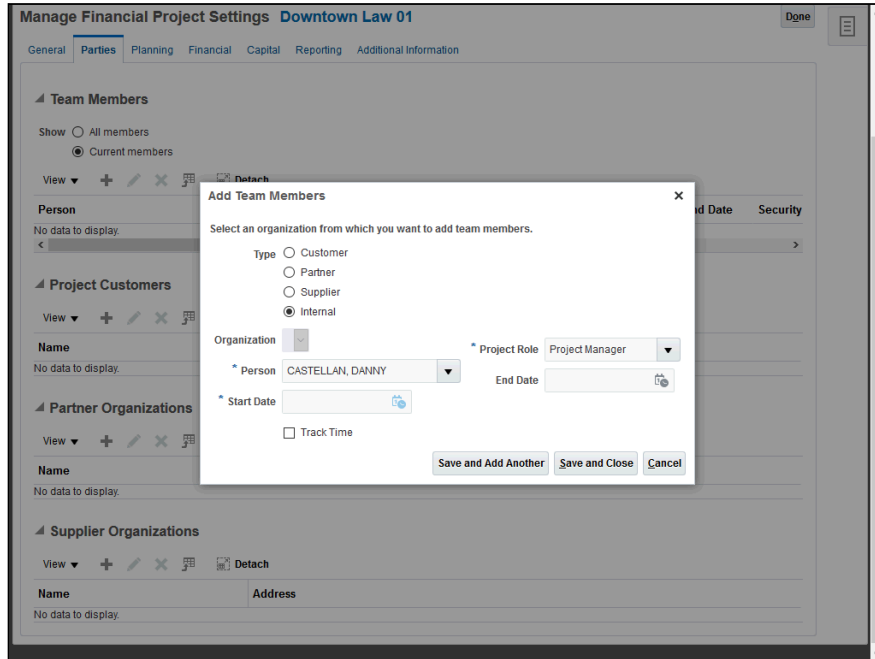




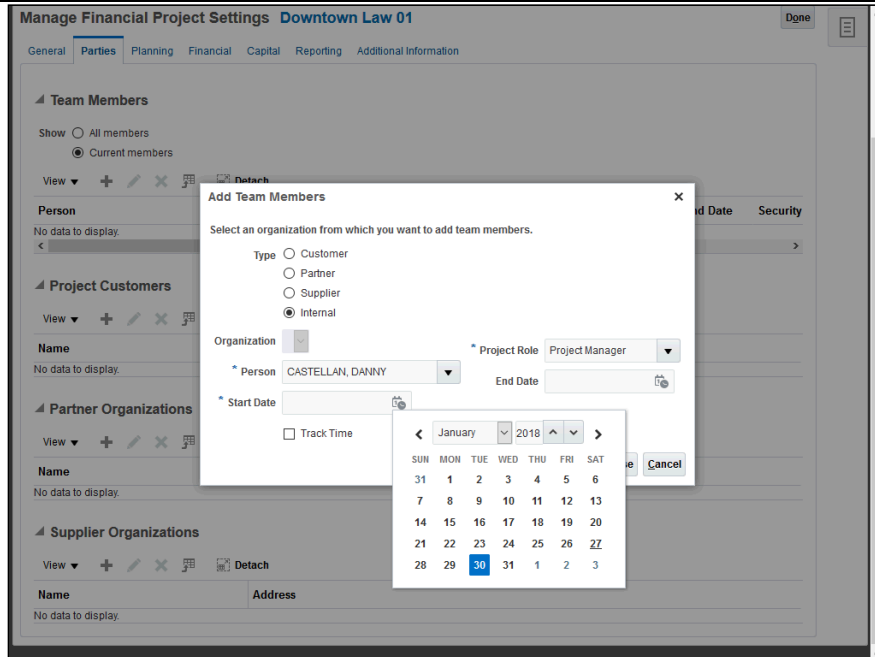
Step	Action
58.	Click the <b>OK</b> button.



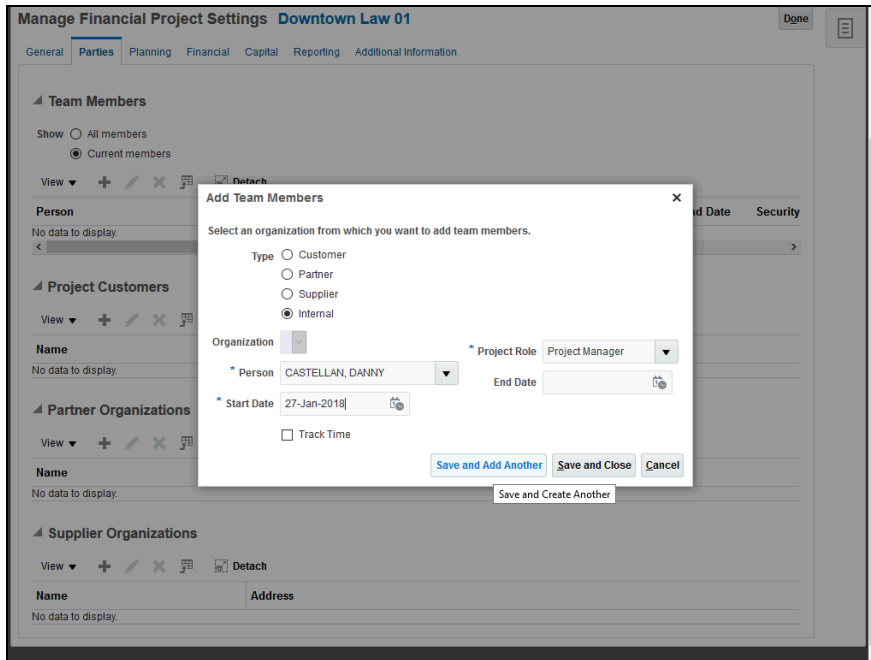
Step	Action
59.	Click the <b>Project Role</b> drop-down button. Select the required option from the drop-down list.



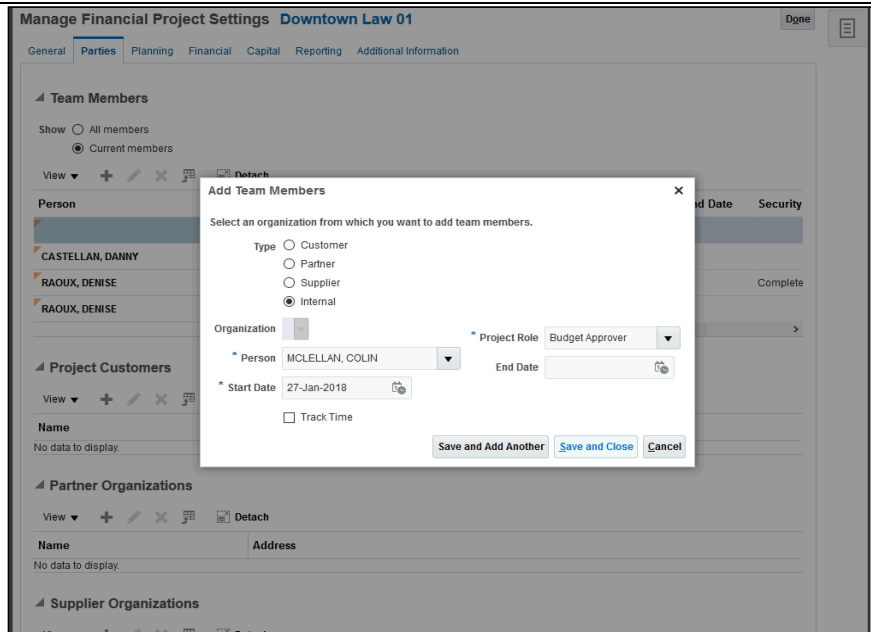
Step	Action
60.	Click the calendar icon for the <b>Start Date</b> field.



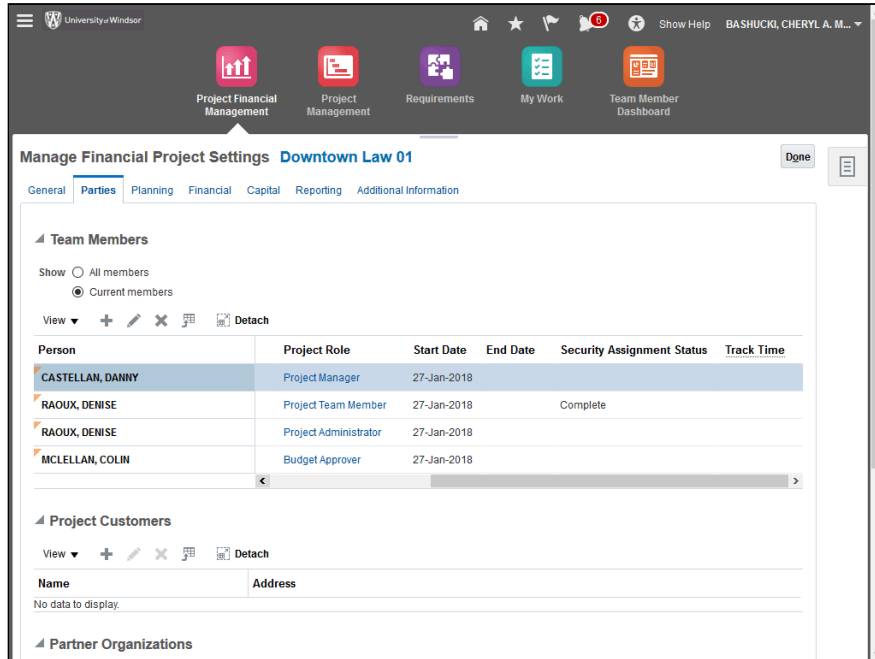
Step	Action
61.	Click to select the required <b>Start Date</b> from the calendar.



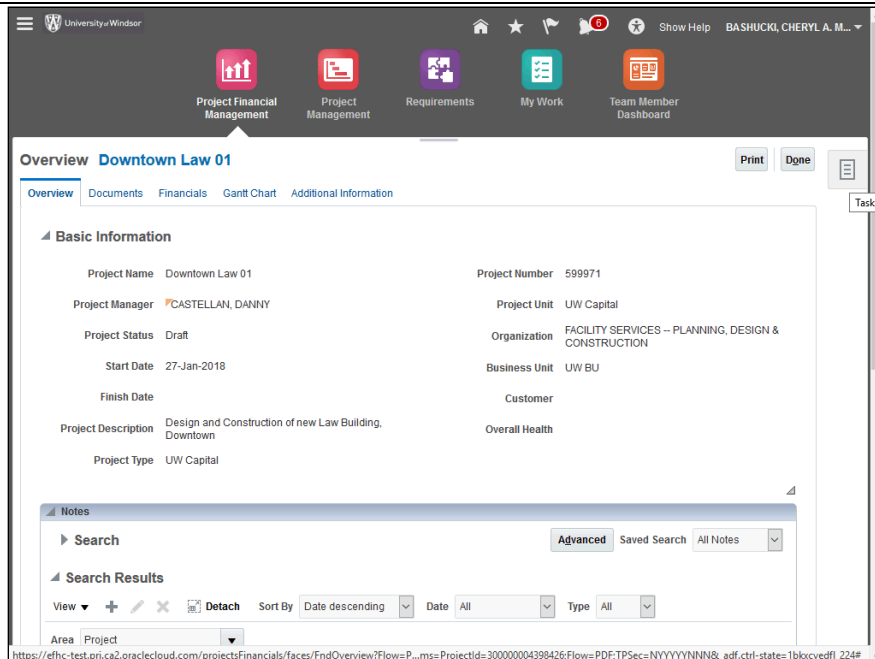
Step	Action
62.	Click the <b>Save and Add Another</b> button if you are adding more than one person to the project. Repeat steps 54 to 62 for each additional person.



Step	Action
63.	Click the <b>Save and Close</b> button once all Project Team Members have been added.



Step	Action
64.	Click the <b>Done</b> button.



Step	Action
65.	<b>End of Procedure.</b>