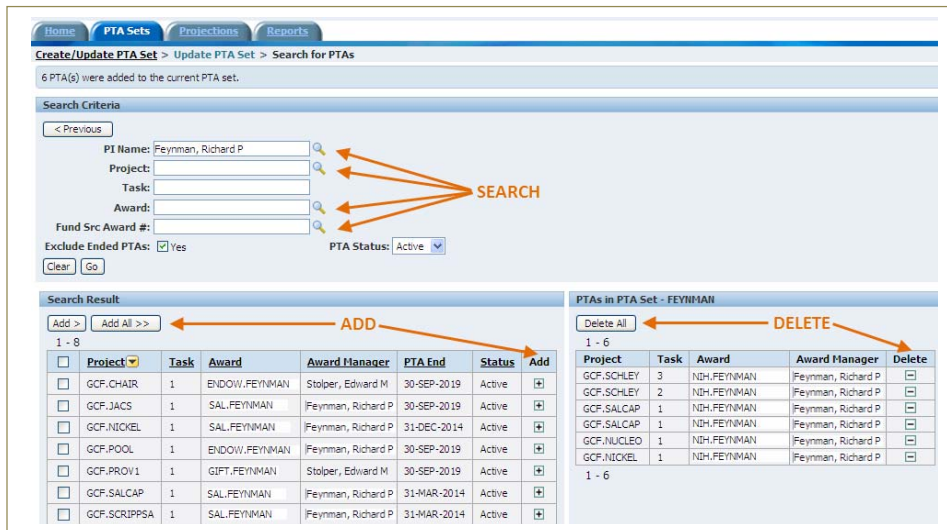


Creating a PTA Set



1. NAME

2. SEARCH



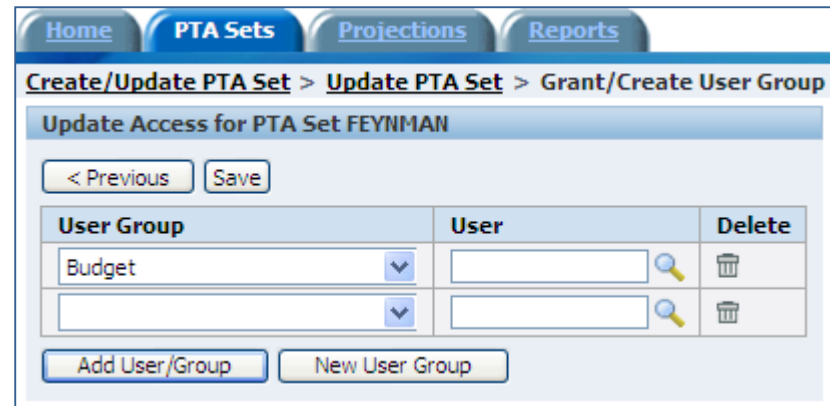
3. ADD/DELETE

PLEASE NOTE: Your search results will only include those PTAs to which you have access. If another user has access to the same PTA Set, but has a different level of security, they will be able to add PTAs to which you might not have access.

Granting Access

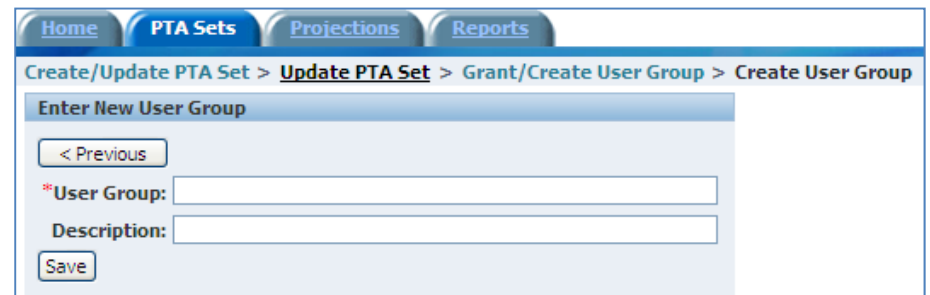
INDIVIDUALS

To add an individual user, click the magnifying glass to the right of the user field box. This will allow you to search for users by name.



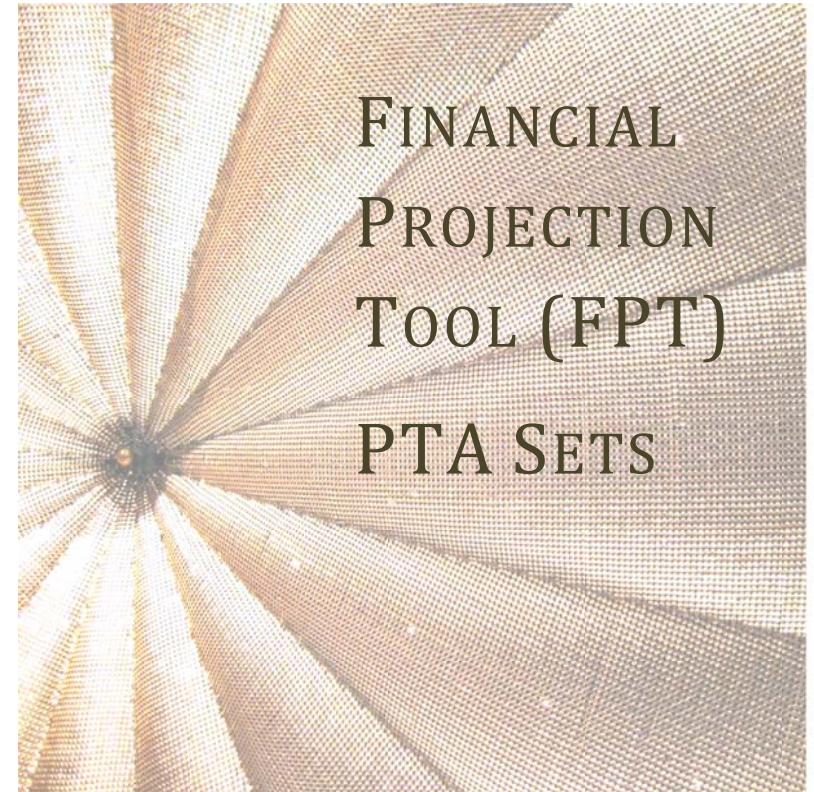
USER GROUPS

To provide access to an existing user group, simply select the group from the dropdown of user groups. Only groups of which you are a part will be listed in the dropdown. You can also create a new user group to add.



Access the Financial Projection Tool via Access Caltech

CONTACTS:



A PTA Set is a group of accounts on which you want to create projections. This group might consist of one PI's PTAs or the PTAs associated with a large project with multiple PIs.

A PTA may be included in more than one PTA Set, but there will be no linkage for that PTA between the various projections from one PTA Set to another.

