

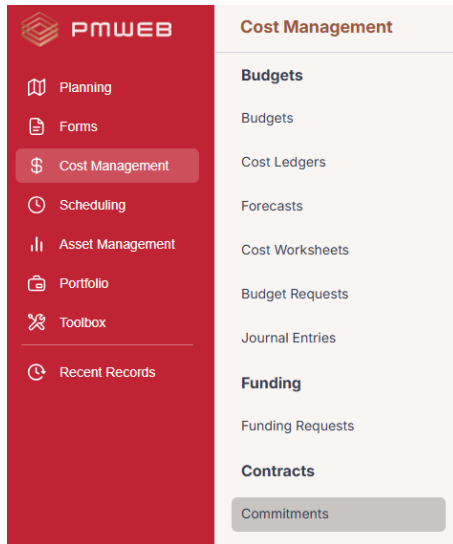
PM

Committing Budget Line Items

Overview: All project commitments must be tracked to ensure proper management of project budgets and cost centers. UHS budget line items, such as PMF, art fee, UHIT, etc. must therefore be committed and invoiced within PM web for continuity. This guide covers committing. Invoicing uses the same guide as entering other project invoice data.

Reference: n/a

1- Under **Cost Management** select **Commitments**.



2- Click the **New Record** button on the upper right side.

3- **Project** field - Select the project from the Project drop down menu. You can start typing the project number or project name to narrow the search.

4- **Description** field – Enter a summary of the funds lines to be committed.

5- **Company** field - Select “University of Houston” from the drop-down menu. You can also start typing to bring up the name

6- **Agreement Type** field – Select “UH Internal” from the drop-down menu.

7- **Effective Date** field – Leave blank.

8- **Days** field – Leave blank.

9- **Status/Revision** - displays record status

10- **Use Units** box - Do not select

11- **Issuer**, etc user defined fields – Optional fields that may be left blank.

12- Click on **Save** button at top header.

13- To enter commitment dollar amounts, click on the **New Line** button in the **Details** section.

14- In the **Cost codes** column, start typing the name or cost code, then select the desired cost code.

15- In the **Ext. Cost** column, enter the dollar value.

16- In the **Notes** column, provide notes as needed for future reference.

17- Click the **Save** button.

18- Add any additional cost code lines following the same process.

19- Under the **Attachments** add any documents.

20- Click on the **Submit** button in the top right.

21- Click on **View Workflow** to review the workflow.

22-Optional to add addition CC e-mails and/or additional comments. DO NOT add attachments as they only stay with the e-mail notification.

23-After review, click on the **Next** button.

24-The draft e-mail will pop up. Click on the **Submit** button.

25-Process Complete.