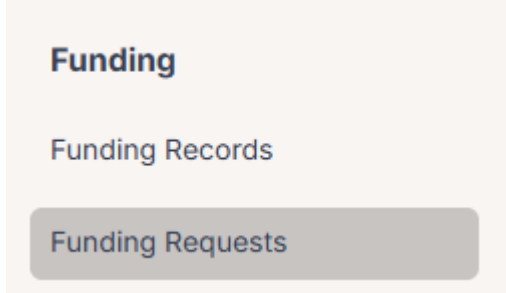


PM – Entering Funding Data

Overview: Project funding information needs to be added to PM Web to ensure proper accounting of funds. For funds that are not added via the PM Web PFA process or another method, PMs need to enter the funding using a Funding Requests record.

- 1- Click on **Cost Management** on the left tab. Under **Funding**, select **Funding Request**.



- 2- Click on **New Record**.



- 3- **Funding by** field – Ensure Project is selected.
- 4- **Project** field – Select the project from the dropdown. You can start typing the project name or number to narrow the list.
- 5- **Record #** field – will auto populate with next sequential number.
- 6- **Description** field - Enter an appropriate description. For example, 'Entering data for original/revised PFA'.
- 7- **Category** field – Select 'Administrative' from the drop-down menu.
- 8- **Post As** field – Use Original Funding if first request. Revised Funding will be used for subsequent requests.
- 9- **PMF Overhead** field – Select FP&C F0307.
- 10- **Capital Project** field – Select Yes.
- 11- **PMF Charge** field – Select Yes. This is the standard but there are rare exceptions when this will be No. Discuss with your PPM if not sure.
- 12- **PMF Type** field – Typically select 3% as FPC overall project costs are typically over \$1M, but enter appropriate percentage if less than \$1M

Header Fields

Funding by Project	Project 1000263-Interim - Nick Merry Test	Record # 11	Description	Status Draft
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Post As
Original Funding

User Defined Fields

Work Order	PMF-Overhead	Capital Project	PMF Charge	PMF Type
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- 13- Click the **SAVE** button.

Cancel

Save

14- Under the details tab at the bottom, select **New Line**.

15- Under the **Source** column select the source from the drop-down menu.

16- Under the **Project Cost Center** column enter the Project Cost Center provided.

17- Under the **Funded** column enter the amount of original funding for that cost center.

18- Under the **Notes** column – It Is IMPORTANT to add notes to describe the funds. The **Notes** field will be available as a reference in other records to help you identify the funding purpose. This may include if the funds are for a specific scope, if the funds have a time restriction (i.e if it needs to be spent first), etc.

19- Save.

20- Repeat above steps for any additional project costs centers.

21- Under the **Attachments** tab, add the PFA (note, PFAs are to be stored in Document Manager in the 1-01 Approvals folder) and other appropriate documents.

Details

Group by: None Layout: Standard

Cancel Save

Line #	Attach...	Source	Notes	Project ...	Funded	Closed		Project
0	(0)				\$0.00			100026...
No records available.								
0 - 0 of 0								
250 Rows								

22- Click the **Submit** button

Submit