

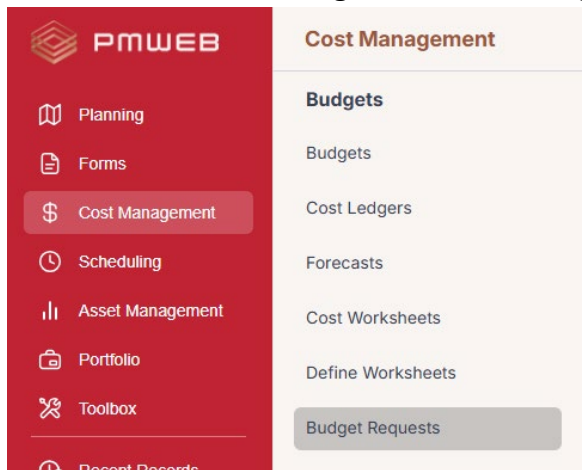
PM

Managing Project Budget

Overview: Project Managers can manage their project budgets and realign funds between cost codes as needs and changes come up. They also distribute funds added to projects to the different cost codes. They move funds using a Budget Request record.

Reference: n/a

1- Under **Cost Management** select **Budget Requests**.



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

Budget Requests (New)

Cancel Save

A screenshot of the 'Budget Requests (New)' form. The form is divided into three sections: 'Header Fields', 'User Defined Fields', and 'PMF Charge'. The 'Header Fields' section contains fields for Project* (S000057), Record #* (001), Description (Added Don...), Reason (02 - Added Scope), and Post As* (Revised Budget). The 'User Defined Fields' section contains fields for Work Order, Revision (0), Use Units (unchecked), Board of Regents Approval Date, PMF-Overhead (FP&C - F0307), and Capital Project (Yes). The 'PMF Charge' section contains fields for PMF Charge (Yes), PMF Type (3%), and PMF Amount (\$1M). Numbered callouts (3-16) are placed over various fields to indicate where to enter data.

- 3- **Project** field - Select the project from the Project drop down menu. You can also start typing the name or number of your project in the field and it will come up.
- 4- **Record #** field – will auto populate with the next sequential number.
- 5- **Description** field - Enter a brief descriptive explanation of the budget change.
- 6- **Reason** field – select '02 – Added/Changed Scope' or '03 – Cost Overrun' for increases/decreases to the overall budget OR '05 – Internal Budget Realignment' to realign cost code budgeted amounts within the existing overall budget amount.
- 7- **Post As** field – Select 'Revised Budget'.
- 8- **Revision** field – Leave blank.
- 9- **Use Units** box – leave unchecked.
- 10- **Work Order** field- Leave Blank.
- 11- **Requires Board of Regents Approval** field – Leave unchecked (Typical).
- 12- **Board of Regents Approval Date** field – Leave blank (Typical).
- 13- **PMF Overhead** field – Select **FP&C F0307**.
- 14- **Capital** field – Select **Yes**.
- 15- **PMF Charge** field – Select **Yes** (Typical).
- 16- **PMF Type** field – Select **3%** (Typical for Capital Projects).

17- Click on the **Save** button in the upper right

Details

Group by: None Layout: Standard

18 New Line Add Cost Codes Export To Excel Paste From Excel Preview Conversions

18- In the Details section, click the **New Line** button.

Group by: None Layout: Standard

23 Cancel Save

Line #	Description	Cost Code*	A...	Project...	Notes
	Project Contingency	99-99		\$0.00	Donor sign

19 21 22

19- Under the **"Cost Code"** drop down box to select the cost OR start typing the cost code to auto-fill.

20- The **Description** field will auto populate after the Cost Code is selected.

21- In the **Project Budget** column, enter the amount for the line.

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

23- Click the Save button.

24- Add any additional budget lines following the same process.

25- Add any PFAs or other funding documents under the **Attachments** tab.

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

Submit Record

Business Process: FPC - Capital Project - D 27 View Workflow

Email Details

Additional CC

Email Subject

PMWeb Approval Request: Plan Review - Nick Merry Test - Submission for full s...

Comments

Attachments

Select files... Drop files here to upload

29 Next

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

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

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

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

31- Process Complete.