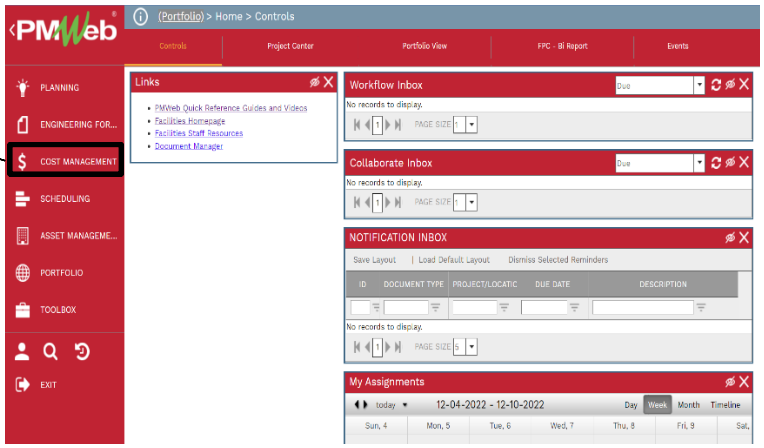
PM – Entering Funding Data

Entering Funding Data (without utilizing the PFA process in PM Web)

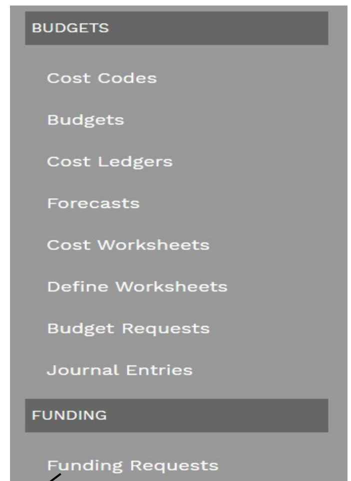
For Original Funding

1- Click on **Cost Management** on the left tab.

1

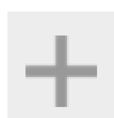


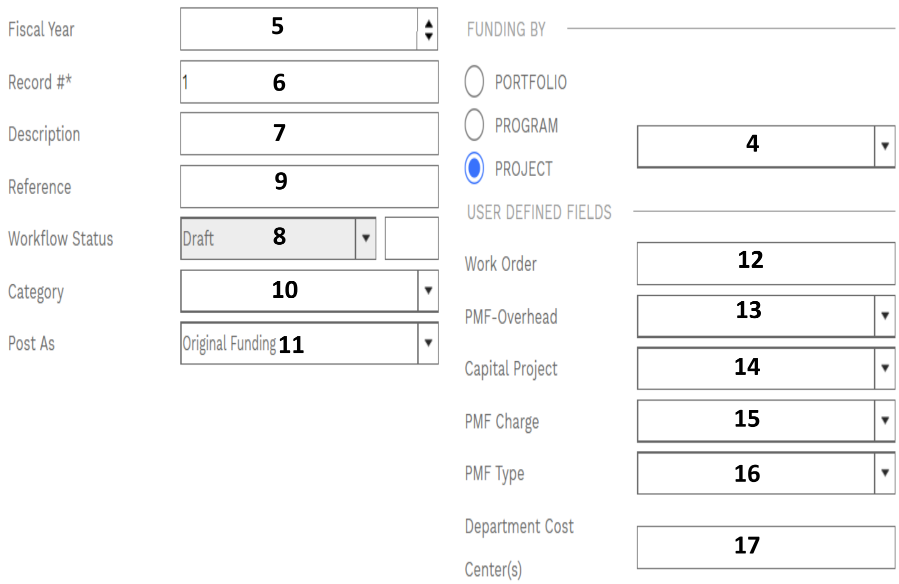
2- Under funding, select **Funding Request**.



2

3- Click on **+** in the top.



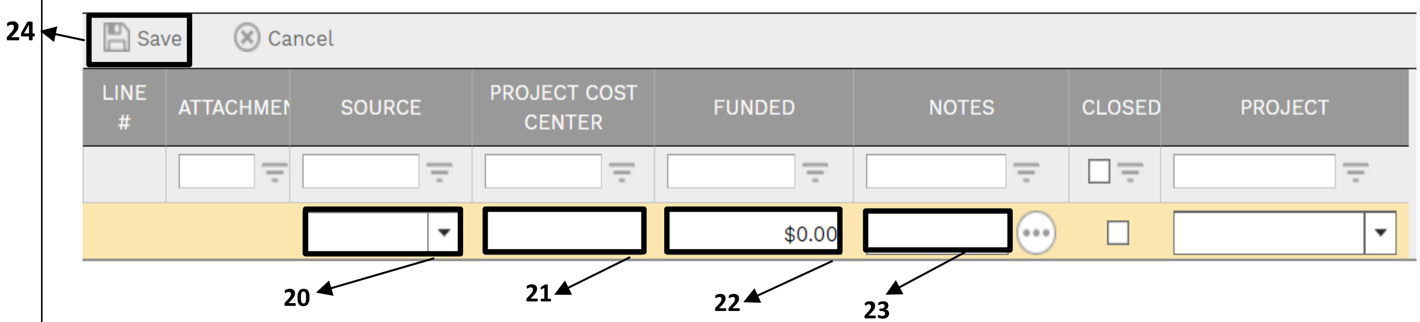


4- **Funding by box** – Ensure PROJECT button is designated and appropriate project is selected from the drop-down menu.
5- **Fiscal Year** field – leave blank.
6- **Record # field** – will auto populate with next sequential number.
7- **Description field** - Enter an appropriate description. For example, ‘Entering data for original PFA’.
8- **Workflow Status field** – will auto populate with current status.
9- **Reference field** – Optional field.

10- **Category field** – Select ‘Administrative’ from the drop-down menu.
11- **Post As field** – Use Original Funding since first request. Revised Funding will be used for subsequent requests.
12- **Work Order field** – Leave blank.
13- **PMF Overhead field** – Select FP&C F0307.
14- **Capital field** – Select Yes.
15- **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.
16- **PMF Type field** – Typically select 3% as FPC overall project costs are typically over $1M, but enter appropriate percentage if less than $1M
17- **Department Cost Center(s) field** – leave blank

18- Click on the **Save Button** at the top.

19- Under the new tab at the bottom, select **+Add.**
20- Under the **“Source”** column select the source from the drop-down menu.
21- Under the **“Project Cost Center”** column enter the Project Cost Center provided.
22- Under the **“Funded”** column enter the amount of original funding for that cost center.
23- U under the **“Notes”** column – IMPORTANT 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.
24- In the **“Grey”** header bar click the Save button.
25- Repeat above steps for any additional project costs centers.



26- 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.

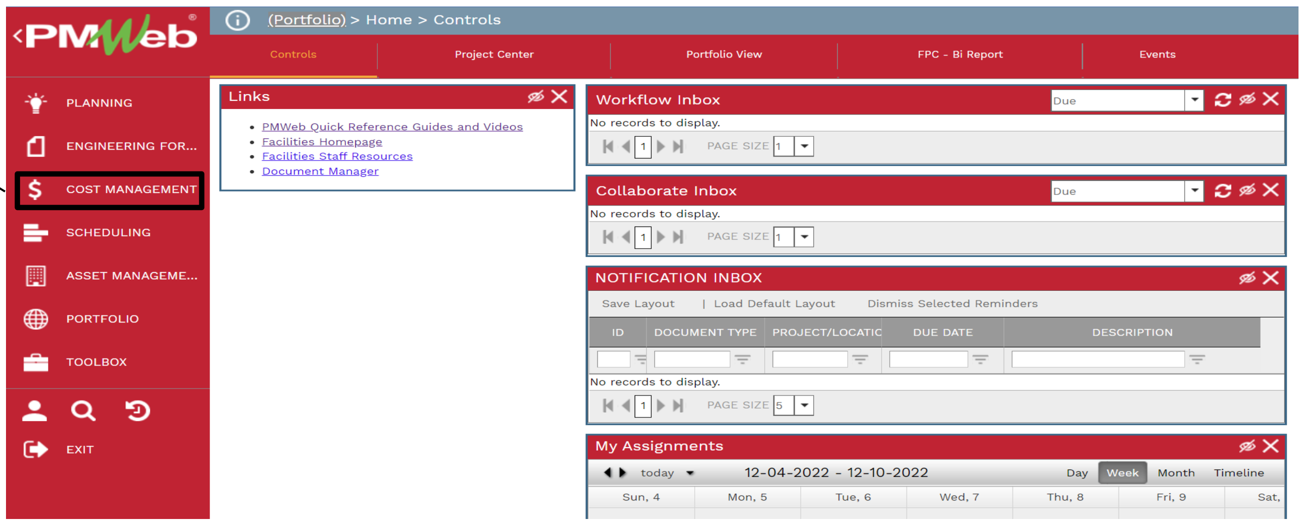
27- Under the **‘Workflow’** tab click on the **Submit** button.
28- When the screen automatically refreshes, click on the **Save** button that pops up.

29- Process Complete

For Additional Funding

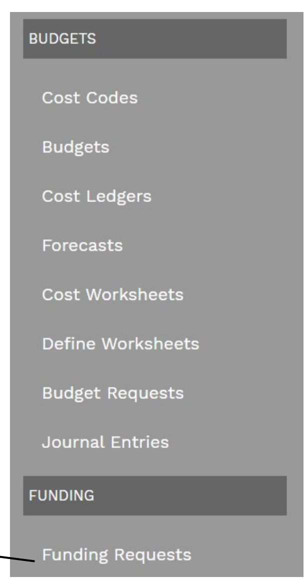
1- Click on **COST MANAGEMENT** from the buttons on the left.

1

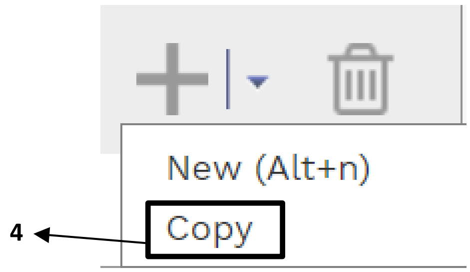


2- Under **Funding**, select **Funding Requests.**

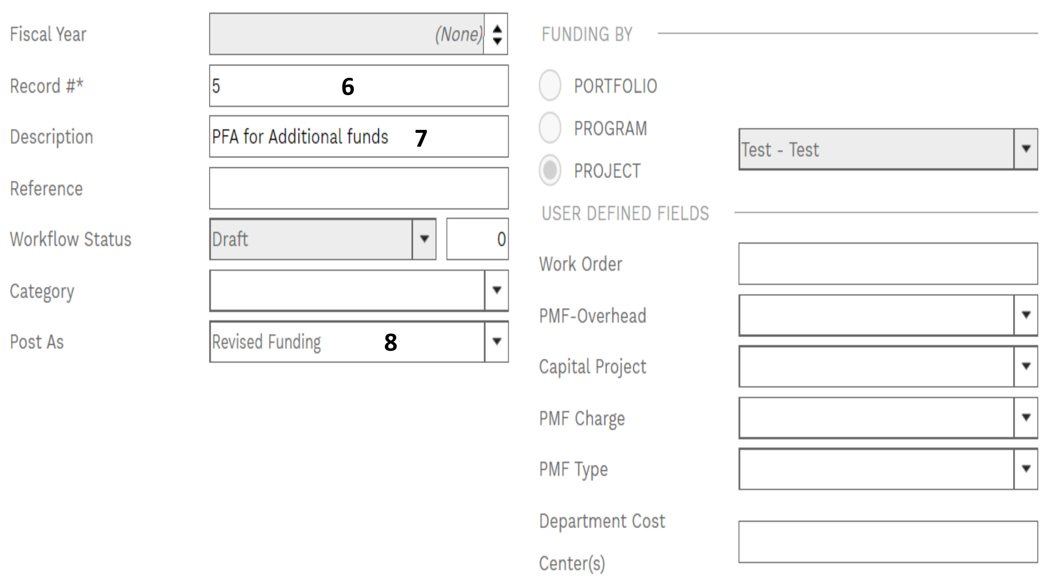
2



3- **Open the latest Funding Request record or if adding funds to an existing project cost center, a Funding Request record with that project cost center.**
4- Click on the dropdown arrow next to Add **+** icon and select **Copy.**
5- Verify the information in the header.

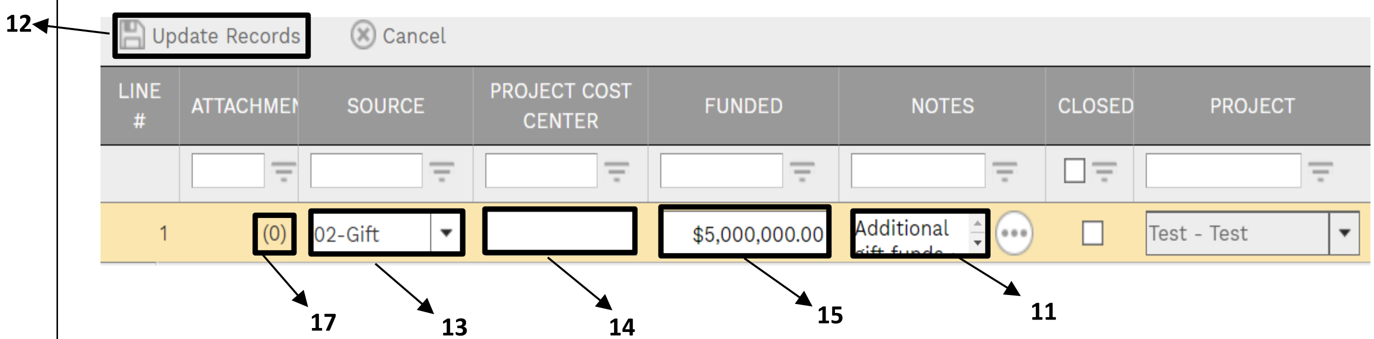


6- **Record # field** – will auto populate with a new number.
7- **Description field** – Enter an appropriate description. For example, ‘Adding funding from additional PFA for donor funding’.
8- **Post As** field – Use Revised Funding.



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

10- A new tab at the bottom will show up, double click on the line with the **Project Cost Center** where funds will be added and edit funding for the amount of funds added.
11- Under the **“Notes”** column add additional notes to explain the funding for your future reference.
12- In the **“Grey”** header bar click the **Update Records** button.
13- Delete any lines where no funds will be added.
14- If new cost centers are being used, click on **+Add**.
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 by Business Services.
17- Under the **“Funded”** column enter the amount of original (or revised) funding for that cost center
18- Repeat above steps for any additional costs centers.



19- 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 attachments
20- Under the **‘Workflow’** tab at the bottom, click on the Submit button.

21- When the screen automatically refreshes, click on the **Save** button that pops up.
22- Process Complete.