



Funding Training Document

Presented by: OnIndus



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Overview

Kahua's Funding Application is a robust solution that provides companies with a variety of applications intended to manage and track costs associated with a project. Kahua's Funding Application is broken into three primary applications - Funding Budget, Funding Budget Adjustments, Funding Budget Changes.

This document is meant to be a guide for each application in the Funding Application. Keep in mind the applications have been customized and updated to meet your company's processes and workflow approval requirements.

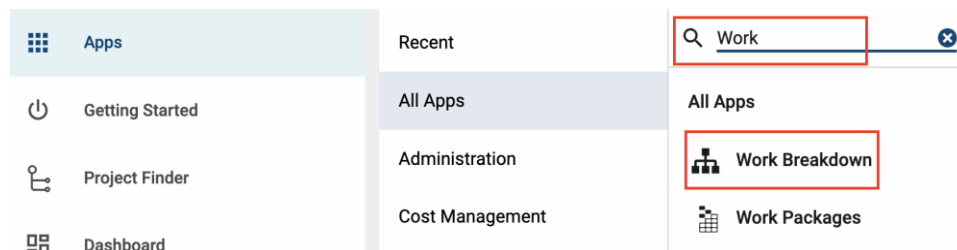
These Funding Application workflows are shown prior to each application



Adding Optional Cost Codes

When new projects are created by using the template, default Cost Codes that have been created in the template will be automatically copied over to the new projects. These cost codes will be available when any Cost transactions are being created in Kahua.

To add additional Cost Codes please navigate to the Project where you would like to add the additional Cost Codes and using the applications menu search for the Work Breakdown.

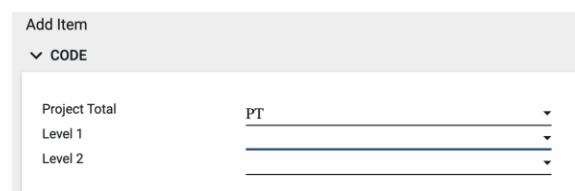


Once the Work Breakdown application has been opened, you will see all the cost transactions that have been created in the Project across all Cost Applications. To add new cost codes please click on the Add button on the Top. This will open a new screen on the right-hand side. In the Code section please select PT for Project Total. For Level 1 you have the following options:

1. 10000
2. 20000
3. 30000
4. 40000

Once the Level 1 has been selected, please select the Level 2 code from the options provided.

1. This will result in the new Level 2 code residing within the selected Level 1 code
2. Project Total and Level 1 have to be selected to create a Level 2 Code





When the Codes have been selected please enter the Description/Name of the Cost Code in the General section and click Save when data has been entered. See Appendix A for the list of Additional Cost Codes and Description/Names.

Funding Application - Budget

Create a Budget

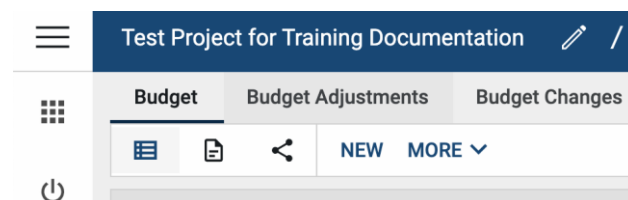
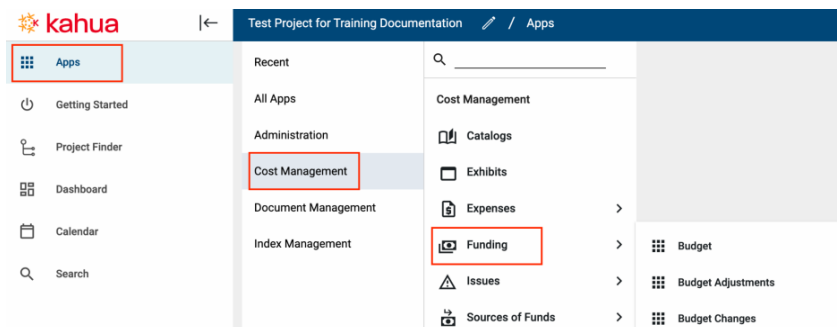
Applicable Roles: Project Manager/Assistant Project Manager, Financial Manager

Roles in Approval Workflow: Project Manager, Financial Manager, Assistant Director, Director, Delegated Authority Levels.


The Budget application allows the Project Manager/Assistant Project Manager to establish a Budget Per Project.

Note: The budget will be displayed in the Work Breakdown app in specific columns based upon the status of the Budget.

1. To access the Funding Budget application, open the Apps repository. Under the Cost Management suite of applications, click on Funding
2. This will launch the Funding Applications which will include:
 - a. Budget
 - b. Budget Adjustments
 - c. Budget Changes
3. To create a new Funding budget, select the Budget tab, then click the New button to open a new budget
4. A new form opens on the right side of the screen
5. Populate the Funding Budget Details such as Subject, Description, Type and Notes





- a. As both the Review and Approval Workflows will be used you will not need to enter dates in the Dates & Workflow section manually as this will increment for you as it routes through workflow
6. To add budget line items, navigate to the Items grid
 - a. Keep in mind, you have the option to budget at a high level
 - b. **Note:** Contracts and Change Orders will be created downstream at a detailed level (detailed cost codes), but you may choose to budget additional funds in excess of executed contract totals to allow for a certain % of Change Orders to be executed so that contract funding line items do not need to be updated for each Change Order
7. To add multiple line items, determine how many lines you will need and click Insert
8. Select the applicable cost code and fill out the remaining details regarding this budget
 - a. **Note:** Do not update the Status on each line.
9. To view the Funding Budget Item in further detail, click more details  icon next to the Funding Budget Item number
10. This view allows for additional detail on the item such as the Scope of Work, Notes, and additional Comments
11. If multiple Funding Budget Items exist, you can use the Previous and Next action buttons located at the Top Right, to sort through the Items
12. Click Done once all budget details have been provided.
13. Documents can be attached to the record under the References section. Attach documents such as Exhibits and other supporting documentation. The user can either:

▼ ITEMS

Status
Projected

Entry Type
Lump Sum

Insert 1 item(s)

<input type="checkbox"/>	Number	Activity Code	Description	Status	Total
<input type="checkbox"/>	01	*		Projected	\$ 0.00

↑ 1 of 2 ↓



REFERENCES

UPLOAD

ADD KAHUA DOC

EDIT

MARKUP

UPDATE

REMOVE

DOWNLOAD

ADD COMPOSITE

ADD APPROVAL DOC

<input type="checkbox"/>	↓ TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	MARKUP?	INCLUDE ON SEND	INCLUDE MARKUP ON SEND	IS CURRENT	PREVIEW STATUS	COMMENTS	
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- a. Upload a document saved on their computer
 - b. Add Kahua Doc to reference a document that is stored within Kahua's File Manager application
 - c. Add Approval Doc which is used anytime a record is being routed for Review or Signature.
14. Once all details have been filled out, click Save/Close
 - a. The initial budget approval will also serve as the project approval
 - b. Update the schedule in the Milestones App before sending the budget for review and approval
15. When you are ready to start the Workflow Click Send for Review

Budget Action Buttons

Once the fields within the record have been completed and saved, the users can select from several actions:

SEND

EDIT

PROCESS

VIEW

DELETE

HISTORY

IMPORT

▼

- Send – Use

messaging to send record details to others (NOT to be confused with a workflow)

- Edit – Update and maintain the record
- Process – Copying a Budget within a project; often used if a user wishes to maintain a version of an estimated budget prior to copying it and creating the approved budget
- View – This action button displays the Portable View (document view)
- Delete – Select this action button to delete a record (typically permission based, so all may not see this)
- History – All updates/changes are tracked
- Import/Export – Import/Export the Budget Line Items using the Kahua Template

7



Send

- Do not confuse Send with using the workflow buttons in any application
- Documents can be sent via a message within Kahua to either existing Kahua users or users outside of Kahua by entering their email address and clicking Enter
- The documents are treated as attachments, and the message can be copied to the Communications application by checking the box


Edit

- The record can be updated as needed during the process
- If the document is out for Review or Signature, Edit will not be available

Process

- If a budget is required to be copied, select the Process action button process, to copy the existing budget fields into a new budget
- The target application indicates the application this budget is being processed to
- **Note:** it is defaulted to the Funding Budget since this is a copy

View

- Records can be viewed as a Portable View in which a PDF version of the data is generated and can be printed out. Select the PDF Icon  to generate a printable PDF version of the document

History

- The History action button provides details regarding all activity (Creation, Updates, Saves, etc.) performed on the record
- To see specific details related to the updates made, click the View Edit button

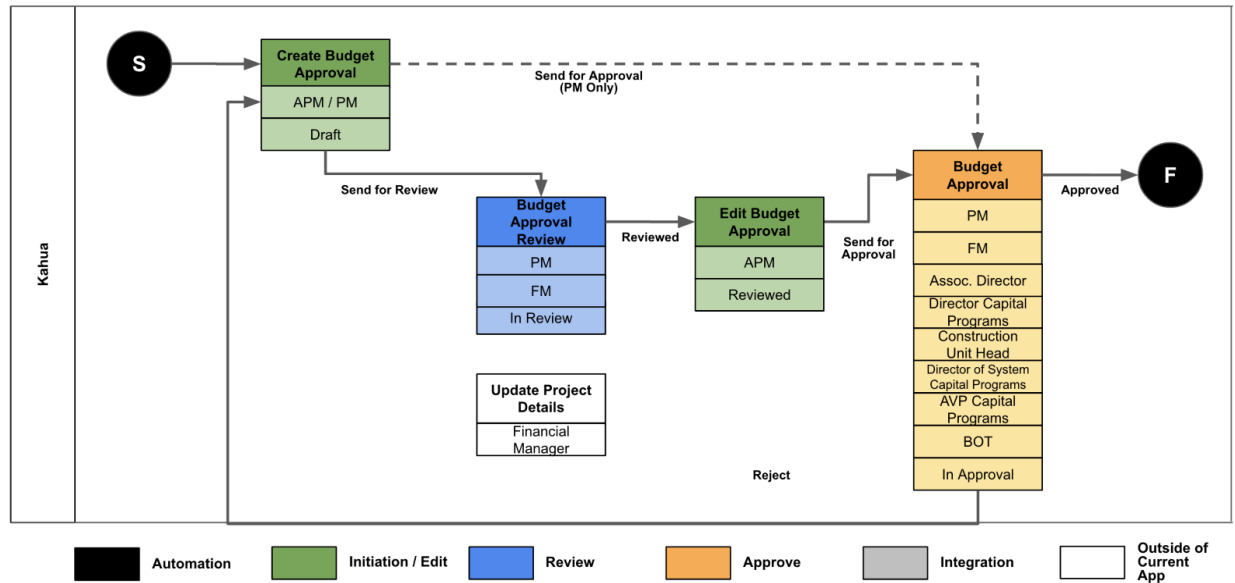
Import/Export

- Import/Export the Budget Line Items using the Kahua Template
- To access the Kahua Template, please fill in a line item and click Export
- This will provide you with the template on how to fill the details
- Once done please save and then Import into Kahua



Workflow

Based on design requirements, the following workflow has been customized for the University of Illinois team across the three universities.



BUDGET - REVIEW WORKFLOW

Order	Role Type (Name or Actor)	Threshold	Limit
1	Project Manager	None	None
2	Financial Manager	None	None

BUDGET - APPROVAL WORKFLOW

Order	Role Type (Name or Actor)	Threshold	Limit
1	Project Manager (Only if Assistant PM creates it)	None	None
2	Financial Manager	None	None
3	Associate Director of Capital Programs	None	None
4	University Director for Capital Programs	None	None
5	University Construction Unit Head	≥ \$1,000,000	None
6	Director of System Capital Programs	≥ \$2,500,000	None



7	AVP of Capital Programs & Utility Services	≥ \$2,500,001	None
8	Board of Trustees	≥ \$5,000,000	Unlimited

Send a Budget for Review

- Once a Budget has been created by the Project Manager or the Assistant Project Manager and the “Send for Review” button is clicked the Review Workflow is initiated
- The Budget will first be sent to the Project Manager for Review where the Project Manager will receive an email in their inbox as well as a Task & Notification in Kahua
 - The Task can be accessed by clicking on the Task icon located at the Top Right corner of Kahua



- Once the Task is opened the Project Manager will see a screen similar to the Image on the right
- The Task will load the Portable View will contain the data on the Project as well as the Budget being Proposed
- When the Project Manager has gone through the information and is satisfied with the details entered, he/she can click on the Reviewed button to move the Workflow to the next step

View Task [icon] [icon] [icon]

View Source Record >

1 of 3 77% [icon] [icon] [icon] [icon] [icon] [icon] [icon] [icon]

Budget in Approval: \$10,000.00

General Information:

Building:	Start Date:	1/1/2024	Project Manager:	Cost Migration
Plan:	Status:	Active	Capitalized:	Capitalized
Room:	Project Approval Status:	1/1/2024	Research Project:	Yes
OSI:	Project Approval Date:	1/1/2024	Project Category:	New Building
W&P:	Release Status:	Tracking	CSB No:	4122
Art in Architecture:	Additional By PI:	121	CSB Year:	2024
SP Code:	Planner:		Reviewed By PI:	436
			W&P No:	412245

Budget Statement

Testing the Portable View

Budget Increase Approvals

Approval Date	Approved Amount	Approval Status	Approval Type	Approval Description
1/1/2024	\$1,000,000.00	Approved	Test Budget - Self Approved	
1/1/2024	\$1,000,000.00	Approved	Testing Budget Validation	
1/1/2024	\$2,000,000.00	Approved	Testing at maximum	
1/1/2024	\$100,000.00	Approved	Testing List Portable View	Testing
	\$500.00	Approved	Test Budget Change - Self Approved	
1/1/2024	\$999,000.00	Approved	Budget Change by API for 100000	Budget Revision

Funding Accounts

Account	Account Type	Account Name	Category	Source	Fund	Obj	Program	Subprogram	Location	Accounted	Allocated	Change
100	General	100	100	100	100	100	100	100	100	\$100,000,000.00	\$1,000,000.00	
Total										\$100,000,000.00	\$1,000,000.00	

Charge Accounts

Cost	Fund	Organization	Program	Activity	Location	Percent	Ratio
0				AD77		100%	

COMMENTS

[Text Area]

Reviewed **Return for Revision**

- If changes need to be made the Project Manager can click on the Return for Revision button to send it back to the Author for changes
 - When the Return for Revision button is clicked a comment box will pop-out where the reason can be entered
- When the Project Manager has finished his/her review and moved it to the next step it will be sent to the Financial Manager



7. At this point the Financial Manager will receive a similar email and Task with a similar looking screen to Review the information
8. Prior to the Financial Manager completing the Review of the record they need to ensure there is enough Funding in the Project to support the Project Budget

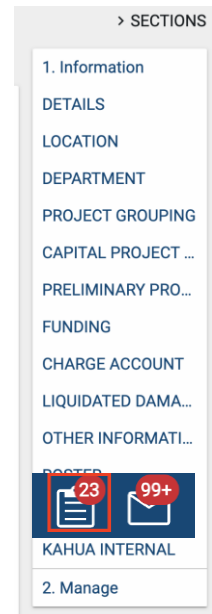


Test Project for Training Documentation



/ Apps

- a. To check or add Funding the Financial Manager should click on the Icon next to the Project Name. This will open the Project Details.
 - b. Click Edit and then using the Quick Navigation menu on the right hand side please navigate to the Funding Section
 - c. Please go ahead and insert as many Funding Sources as required along with the corresponding Charge Accounts if they are available
9. Once the Funding information has been entered and there is enough money to ensure the Budget can be supported, please navigate back to the Task using the icons located at the Top Right of the Kahua Screen
10. Please go ahead and complete the Review of the Budget as the Financial Manager and once done please click on Reviewed
11. After the Financial Manager has completed the Review of the Budget the Review Process will be completed and an email will be sent to the Author/Creator of the Budget and the Status will change to Review Complete
12. The Author/Creator of the Budget can now start the Approval process by clicking on the Send for Approval button



Send a Budget for Approval

1. The Approval process for the Budget can only begin after the Review process has been completed
2. During the approval process the Budget Amount will be validated against the “Total Funding Received” value entered in the Funding Dynamic Grid in the Project Details
3. Once the Author/Creator of the Budget clicks on the Send for Approval button the approval process is initiated
4. If the Assistant Project Manager is the Author/Creator, the Budget will first go to the Project Manager for Approval
5. If the Project Manager is the Author/Creator of the Budget it will instead go to the Financial Manager for Approval
6. A screen similar to the Review Task will be presented during the Approval process with the option to Approve or Decline the Budget
 - a. From the 2nd Approver onwards, they will see another option to Revert to the Prior Approver
 - b. This option can be used to clarify any doubts that could be answered by the previous Approver
7. The Budget Approval process will following a Threshold Based Approval as outlined on Page-9 in the Approval Workflow Table
8. Once all Approvals are done the Author/Creator of the Budget as well as the Financial Manager will be notified that the Budget has been Approved

[illegible][illegible]



Funding Application - Budget Adjustments

Creating a Budget Adjustment

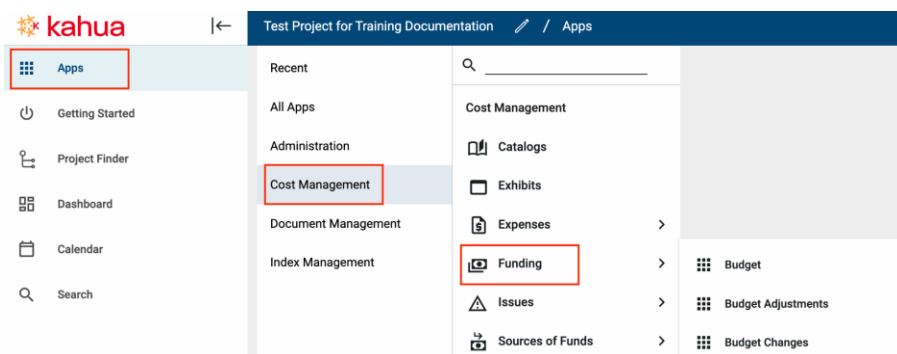
The Budget Adjustments application allows you to relocate project budget funds from one activity code to another cost code. Cost amounts are tracked in Work Breakdown according to status.

1. To access the Funding Budget Adjustment application, open the **Apps** repository.

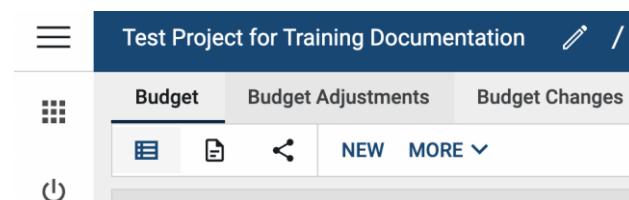
Under the Cost Management suite of applications, click on **Funding**

2. This will launch the Funding Applications which will include:

- a. Budget
- b. Budget Adjustments
- c. Budget Changes



3. To create a new Funding budget, select the **Budget Adjustments** tab, then click the **New** button to open a new budget adjustment
4. A new form on the right side of the screen
5. Populate the Funding Budget Adjustment **Details** such as Description, Date, Reason, and Notes



- a. As both the Review (Conditional: If the Assistant Project Manager Creates the Budget Adjustment) and Approval Workflows will be used you will not need to enter dates in the **Dates & Workflow** section manually as this will increment for you as it routes through workflow
6. To add budget adjustment line items, navigate to the **Items** grid
 7. Two items will already be available to easily reallocate funds. However, there is the option to add multiple line items by utilizing the **Insert** button above the grid



8. Select the applicable cost codes and fill out the remaining details regarding this budget adjustment
 - a. Ensure you have at least 1 positive and 1 negative (type a '-' sign to enter a negative number), as the adjustment should equal a net total of 0.


▼ ITEMS

Status
Projected

Entry Type
Lump Sum

Insert 1 item(s)

<input type="checkbox"/>	<input type="checkbox"/>	Number	Activity Code	Description	Status	Total
<input type="checkbox"/>	<input checked="" type="checkbox"/>	01	*		Projected	\$ 0.00
<input type="checkbox"/>	<input checked="" type="checkbox"/>	02	*		Projected	\$ 0.00

9. To view the Funding Budget Adjustment Items in further detail, click more details  icon next to the Funding Budget Adjustment Item number. This view allows for additional detail on the item such as the Scope of Work, Notes, and additional Comments
 - a. Use the **Previous** and **Next** action buttons to sort through the Items if needed
10. Click **Done** once all detail has been provided
11. Documents can be attached to the record under the References section. The user can either:

▼ REFERENCES

UPLOAD ADD KAHUA DOC EDIT MARKUP UPDATE REMOVE DOWNLOAD ADD COMPOSITE ADD APPROVAL DOC

<input type="checkbox"/>	↓ TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	MARKUP?	INCLUDE ON SEND	INCLUDE MARKUP ON SEND	IS CURRENT	PREVIEW STATUS	COMMENTS
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- a. Upload a document saved on their computer
 - b. Add Kahua Doc to reference a document that is stored within Kahua's File Manager application
 - c. Add Approval Doc which is used anytime a record is being routed for Review or Signature.
12. Once all details have been filled out, click Save/Close
13. When you are ready to start the Workflow **Click Send for Approval** (if created by the Assistant Project Manager - Click Send for Review)



Budget Adjustment Action Buttons

Once the fields within the record have been completed and saved, the users can select from several actions:

SEND EDIT VIEW ▼ DELETE HISTORY

- **Send** – Use messaging to send record details to others (NOT to be confused with a workflow)
- **Edit** – Update and maintain the record
- **View** – This action button displays the Portable View (document view)
- **Delete** – Select this action button to delete a record (typically permission based, so all may not see this)
- **History** – All updates/changes are tracked


Send

- Do not confuse **Send** with using the workflow buttons in any application
- Documents can be sent via a message within Kahua to either existing Kahua users or users outside of Kahua by entering their email address and clicking **Enter**
- The documents are treated as attachments, and the message can be copied to the **Communications** application by checking the box

Edit

- The record can be updated as needed during the process
- If the document is out for Review or Signature, **Edit** will not be available

View

- Records can be viewed as a Portable View in which a PDF version of the data is generated and can be printed out. Select the **PDF Icon**  to generate a printable PDF version of the document



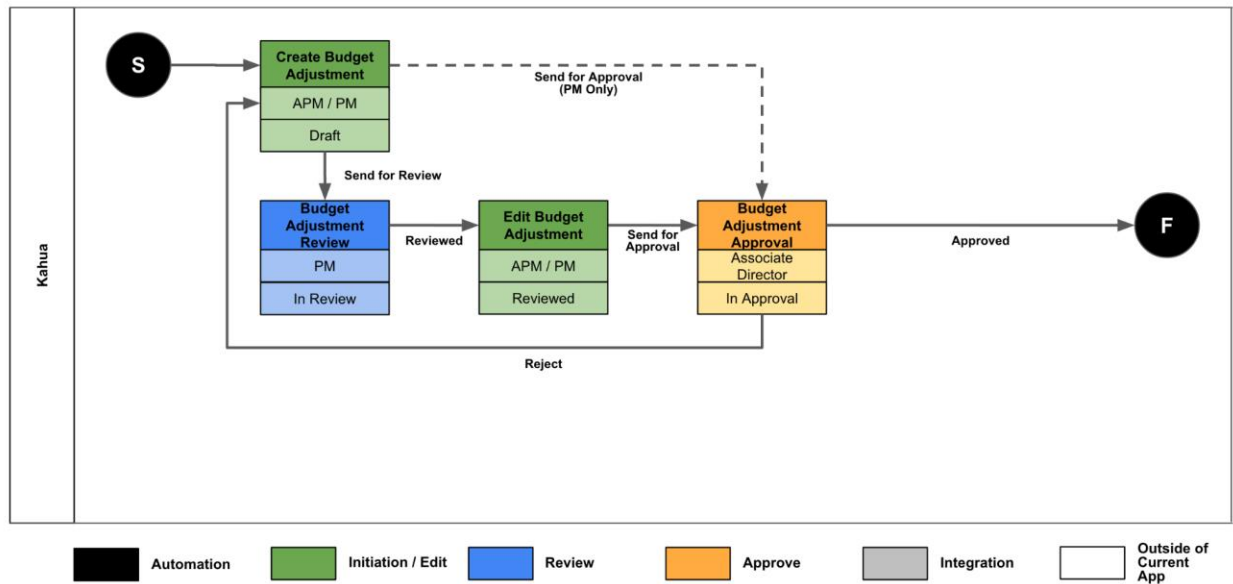
History

- The **History** action button provides details regarding all activity (Creation, Updates, Saves, etc.) performed on the record
- To see specific details related to the updates made, click the View Edit button



Workflow

Based on design requirements, the following workflow has been customized for the University of Illinois team across the three campuses.



BUDGET ADJUSTMENT - REVIEW WORKFLOW			If APM Creates it
Order	Role Type (Name or Actor)	Threshold	Limit
1	Project Manager	None	None

BUDGET ADJUSTMENT - APPROVAL WORKFLOW			
Order	Role Type (Name or Actor)	Threshold	Limit
1	Associate Director of Capital Programs	None	Unlimited



Send a Budget Adjustment for Review

1. Once a Budget Adjustment has been created by the Assistant Project Manager and the “Send for Review” button is clicked the Review Workflow is initiated
2. The Budget Adjustment will be sent to the Project Manager for Review where the Project Manager will receive an email in their inbox as well as a Task & Notification in Kahua

- a. The Task can be accessed by clicking on the Task icon located at the Top Right corner of Kahua



3. Once the Task is opened the Project Manager will see a screen similar to the Image on the right
4. The Task will load the Portable View will contain the data on the Budget Adjustment being Proposed
5. When the Project Manager has gone through the information and is satisfied with the details entered, he/she can click on the Reviewed button to move the Workflow to the next step

View Source Record >

APPROVAL DOCUMENT

1 of 1 77% [Icons]

UNIVERSITY OF ILLINOIS
Project: Testing - LPT Project

UI Budget Adjustment No.: 0001

Description: Testing Budget Adjustment Portable View

Number: 0001 Date: 5/10/2024

Status: Proposed Reason: Reallocation

Budget Status: Testing

Dates: Data Sent for Review: 5/10/2024 Data Reviewed: 5/10/2024

Data Sent for Signature: 5/10/2024 Data Authorized: 5/10/2024

Item	DESCRIPTION	ACTIVITY CODE	TOTAL
01	Contribution	10000	\$0.000000
02	Contribution Total	10011	\$0.000000
Total			\$0.00

Referenced Documents

TYPE	DESCRIPTION	CONTRIBUTOR	DATE
SupportingDocument	0001 Testing of Approval/Portfolio Management/Testing Budget Adjustment UI	5/10/2024 11:55 PM	

COMMENTS

Reviewed Return for Revision

- a. If changes need to be made the Project Manager can click in the Return for Revision button to send it back to the Author for changes
 - b. When the Return for Revision button is clicked a comment box will pop-out where the reason can be entered
6. After the Project Manager has completed the Review of the Budget Adjustment the Review Process will be completed and an email will be sent to the Assistant Project Manager of the Budget Adjustment and the Status will change to Review Complete
 7. The Assistant Project Manager can now start the Approval process by clicking on the Send for Approval button



Sending a Budget Adjustment for Approval

1. If the Project Manager is creating the Budget Adjustment, it can directly be sent in the Approval process by clicking the Send for Approval button
2. The Assistant Project Manager can only start the Approval process after the Review process is complete
3. Once the Assistant Project Manager or the Project Manager clicks on the Send for Approval button the approval process is initiated
4. The Budget Adjustment will be sent to the Associate Director Capital Programs for Approval
5. A screen similar to the Review Task will be presented during the Approval process with the option to Approve or Decline the Budget
6. Once the Associate Director Capital Programs approves the Budget Adjustment it will be approved, and the Author/Creator of the Budget Adjustment will receive a notification and email

View

View Source Record >

Task

APPROVAL DOCUMENT

1 of 1 77%

UNIVERSITY OF ILLINOIS
Project: Alton, 1581 Project UJ Budget Adjustment No.: 2000

Description
Testing Budget Adjustment Portable View

Number
2000

Date
1/15/2024

Status
Pending

Reason
Reevaluation

Budget Notes
Testing

Dates
Date Sent for Review: 2/7/2024 Date Received: 2/7/2024
Date Sent for Signature: 2/7/2024 Date Authorized: 2/15/2024

NO	DESCRIPTION	ACTIVITY CODE	TOTAL
01	Construction	1000	\$2,000.00
02	Construction Total	1001	\$2,000.00
			Total
			\$0.00

Referenced Documents

TYPE	DESCRIPTION	CONTRIBUTOR	DATE
Supporting Document	0001 Testing of approval through signature process (2/7/2024 11:50 PM)		

COMMENTS

Approve Decline



Funding Application - Budget Changes

Create a Budget Change

The Budget Changes application allows you to add funds to the project budget.

This is used when a net change occurs to the overall budget *after* the original budget is approved and allows for a clear audit trail of any changes impacting total project budget.

Cost amounts are tracked in Work Breakdown according to status.

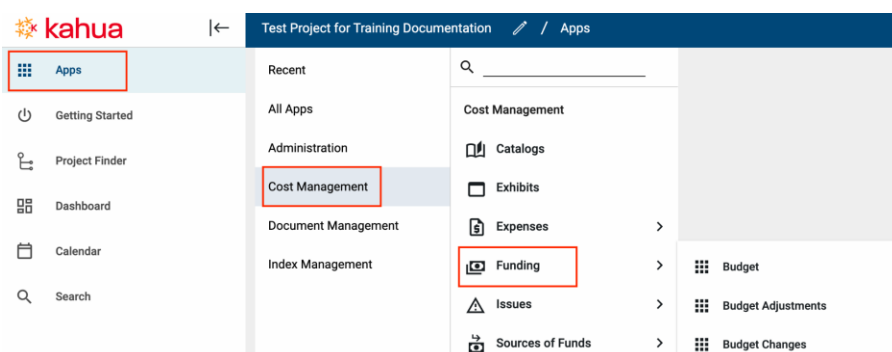
1. To access the Funding Budget Change application, open the **Apps** repository. Under the Cost Management suite

of applications, click on

Funding

2. This will launch the Funding Applications which will include:

- a. Budget
- b. Budget Adjustments
- c. Budget Changes



3. To create a new Funding budget Change, select the **Budget Changes** tab, then click the **New** button to open a new budget change

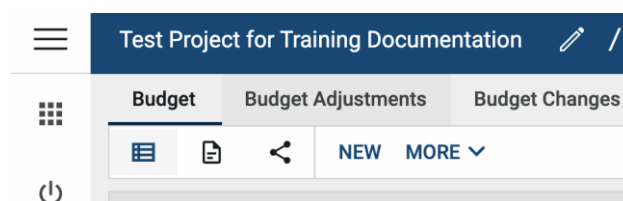
4. A new form on the right side of the screen.

5. Populate the Funding Budget Change **Details** such as Date, Description, Reason, and Notes

- a. As both the Review and Approval Workflows will be used you will not need to enter dates in the **Dates & Workflow** section manually as this will increment for you as it routes through workflow

6. To add budget change line items, navigate to the **Items** grid


- a. A single line item will already be available.





b. However, there is the option to add multiple line items by clicking **Insert**

7. Select the applicable cost codes and fill out the remaining details regarding this record

8. To view the Items in further detail, click more details  icon next to the Item number


9. This view allows for additional detail on the item such as the Scope of Work, Notes, and additional Comments

▼ ITEMS

Status
Projected

Entry Type
Lump Sum

Insert 1 item(s)

<input type="checkbox"/>	Number	Activity Code	Description	Status	Total
<input type="checkbox"/>	 01	*		Projected	\$ 0.00

10. Use the **Previous** and **Next** action buttons to sort through the Items if needed

↑ 1 of 2 ↓

11. Click **Done** once all detail has been provided

12. Documents can be attached to the record under the References section. The user can either:

▼ REFERENCES

UPLOAD ADD KAHUA DOC EDIT MARKUP UPDATE REMOVE DOWNLOAD ADD COMPOSITE ADD APPROVAL DOC

<input type="checkbox"/>	↓	TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	MARKUP?	INCLUDE ON SEND	INCLUDE MARKUP ON SEND	IS CURRENT	PREVIEW STATUS	COMMENTS
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- Upload a document saved on their computer
 - Add Kahua Doc to reference a document that is stored within Kahua's File Manager application
 - Add Approval Doc which is used anytime a record is being routed for Review or Signature.
13. Once all details have been filled out, click Save/Close
14. When you are ready to start the Workflow **Click Send for Review**



Budget Changes Action Buttons

Once the fields within the record have been completed and saved, the users can select from several actions:

SEND	EDIT	PROCESS	VIEW	DELETE	HISTORY	IMPORT ▼	• Send – Use
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messaging to send record details to others (NOT to be confused with a workflow)

- Edit – Update and maintain the record
- Process – Copying a Budget Change within a project; often used if a user wishes to maintain a version of an estimated budget change prior to copying it and creating the approved budget change
- View – This action button displays the Portable View (document view)
- Delete – Select this action button to delete a record (typically permission based, so all may not see this)
- History – All updates/changes are tracked
- Import/Export – Import/Export the Budget Change Line Items using the Kahua Template

Send

- Do not confuse Send with using the workflow buttons in any application
- Documents can be sent via a message within Kahua to either existing Kahua users or users outside of Kahua by entering their email address and clicking Enter
- The documents are treated as attachments, and the message can be copied to the Communications application by checking the box

Edit

- The record can be updated as needed during the process
- If the document is out for Review or Signature, Edit will not be available


Process

- If a budget change is required to be copied, select the Process action button process, to copy the existing budget change fields into a new budget change
- The target application indicates the application this budget change is being processed to



- Note: it is defaulted to the Funding Budget Change since this is a copy.

View

- Records can be viewed as a Portable View in which a PDF version of the data is generated and can be printed out. Select the PDF Icon  to generate a printable PDF version of the document

History

- The History action button provides details regarding all activity (Creation, Updates, Saves, etc.) performed on the record
- To see specific details related to the updates made, click the View Edit button

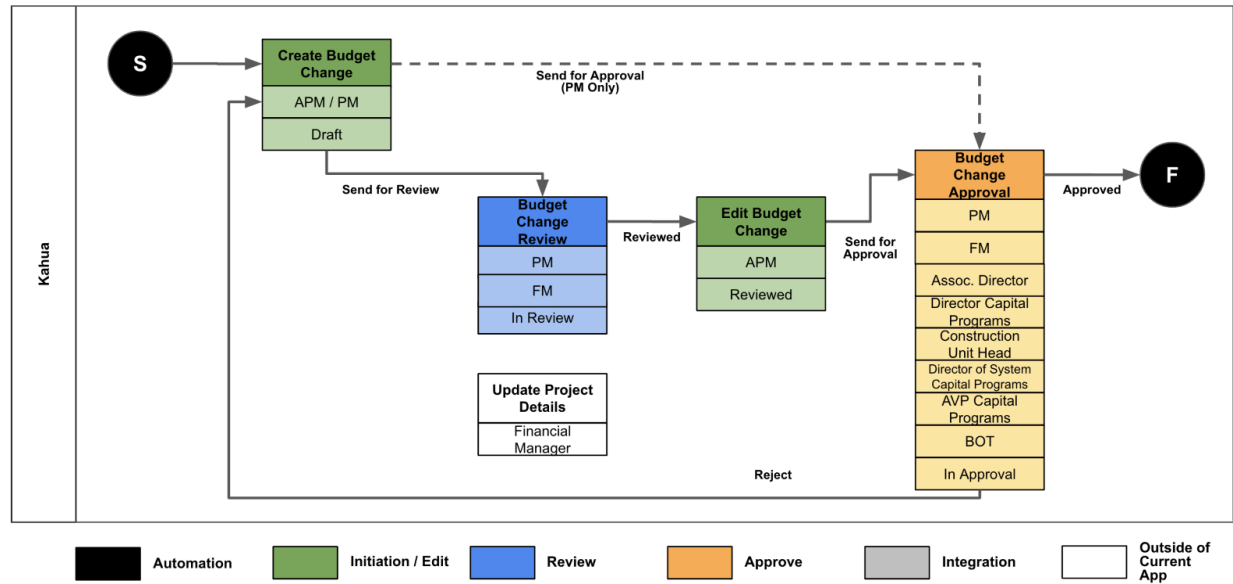
Import/Export

- Import/Export the Budget Change Line Items using the Kahua Template
- To access the Kahua Template, please fill in a line item and click Export
- This will provide you with the template on how to fill the details
- Once done please save and then Import into Kahua



Workflow

Based on design requirements, the following workflow has been customized for the University of Illinois team across the three campuses.

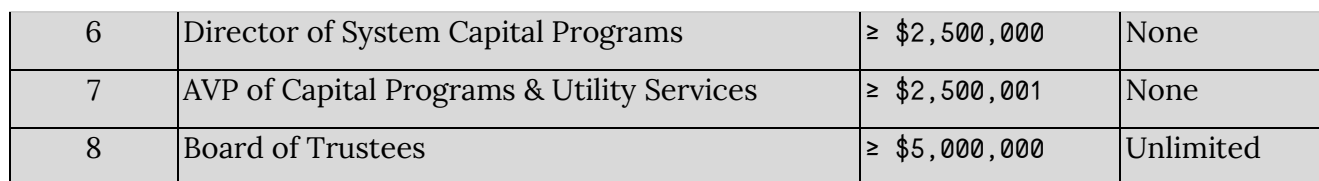


BUDGET CHANGE - REVIEW WORKFLOW

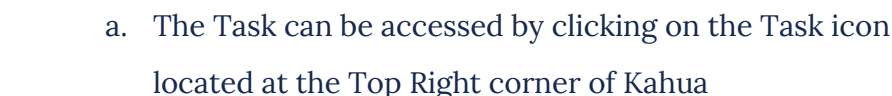
Order	Role Type (Name or Actor)	Threshold	Limit
1	Project Manager	None	None
2	Financial Manager	None	None

BUDGET CHANGE - APPROVAL WORKFLOW

Order	Role Type (Name or Actor)	Threshold	Limit
1	Project Manager (Only if Assistant PM creates it)	None	None
2	Financial Manager	None	None
3	Associate Director of Capital Programs	None	None
4	University Director for Capital Programs	None	None
5	University Construction Unit Head	≥ \$1,000,000	None



1. Once a Budget Change has been created by the Project Manager or the Assistant Project Manager and the “Send for Review” button is clicked the Review Workflow is initiated
2. The Budget Change will first be sent to the Project Manager for Review where the Project Manager will receive an email in their inbox as well as a Task & Notification in Kahua



3. Once the Task is opened the Project Manager will see a screen similar to the Image on the right
4. The Task will load the Portable View will contain the data on the Project as well as the Budget Change being Proposed
5. When the Project Manager has gone through the information and is satisfied with the details entered, he/she can click on the Reviewed button to move the Workflow to the next step

- If changes need to be made the Project Manager can click in the Return for Revision button to send it back to the Author for changes
- When the Return for Revision button is clicked a comment box will pop-out where the reason can be entered



6. When the Project Manager has finished his/her review and moved it to the next step it will be sent to the Financial Manager
7. At this point the Financial Manager will receive a similar email and Task with a similar looking screen to Review the information
8. Prior to the Financial Manager completing the Review of the record they need to ensure there is enough Funding in the Project to support the Project Budget Change

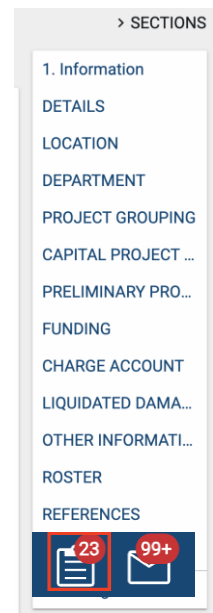


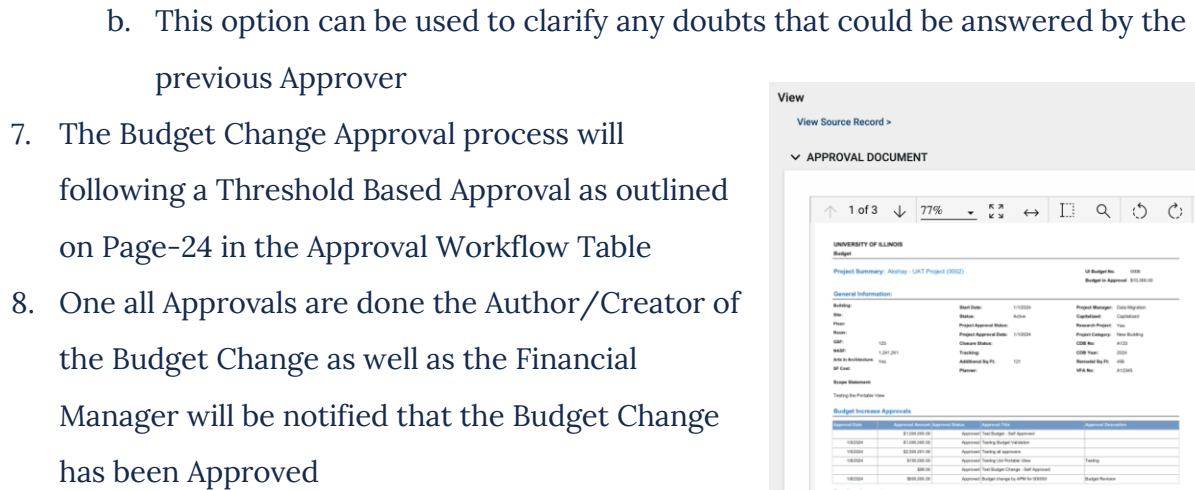
Test Project for Training Documentation



/ Apps

- a. To check or add Funding the Financial Manager should click on the Icon next to the Project Name. This will open the Project Details.
 - b. Click Edit and then using the Quick Navigation menu on the right hand side please navigate to the Funding Section
 - c. Please go ahead and insert as many Funding Sources as required along with the corresponding Charge Accounts if they are available
9. Once the Funding information has been entered and there is enough money to ensure the Budget Change can be supported, please navigate back to the Task using the icons located at the Top Right of the Kahua Screen
 10. Complete the Review of the Budget Change as the Financial Manager and once done please click on Reviewed
 11. After the Financial Manager has completed the Review of the Budget Change the Review Process will be completed and an email will be sent to the Author/Creator of the Budget Change and the Status will change to Review Complete
 12. The Author/Creator of the Budget Change can now start the Approval process by clicking on the Send for Approval button





View

View Source Record >

APPROVAL DOCUMENT

SECTIONS

APPROVAL DOCUMENT...
COMMENTS
REFERENCES

1 of 3

77%

UNIVERSITY OF ILLINOIS

Budget

Project Summary: Healthy - UAT Project (2022)

UT Budget Info

0000

Budget in Approval

\$1,000.00

General Information

Building

Start Date

1/1/2023

Project Manager

Cindy Hagan

Room

Status

Active

Capitalized

Capitalized

Floor

Project Approval Status

Not in Progress

Not in Progress

Room

Project Approval Date

1/1/2023

Project Approval

New Building

Cost

0.00

Class Status

CRS New

ATC2

Acctd

1/20/2021

Tracking

CRS New

ATC2

Auto in Workstation

Yes

Additional Bg Pk

121

Revised By PK

455

UT Code

Planest

454 New

ATC2005

Expense Worksheet

Tracking for Portable View

Budget Increase Approvals

Approval Date	Approved Amount	Approved Method	Approval Type	Approval Description
1/1/2023	\$1,000.00 (0.00)	Approval	Test Budget - Self Approved	
1/1/2023	\$1,000.00 (0.00)	Approval	Test Budget - Self Approved	
1/1/2023	\$2,000.00 (1.00)	Approval	Approval - Testing of approvals	
1/1/2023	\$200.00 (0.00)	Approval	Approval - Testing of Multiple Lines	Testing
	0.00 (0)	Approval	Test Budget - Change	Self Approved
1/1/2023	\$500.00 (0.00)	Approval	Approval - Budget change by PK for 1/1/2023	Budget Revision

Funding Accounts

	Funding Source	Funding Source Code	Category Code	Class	Class Code	Class Description	Department	Department Code	Department Description	Original Budget	Current Budget	Current Budget Change
Total		171	201	AM	1	123	123	124	New	2021/12/31	\$1,000.00 (0.00)	\$1,000.00 (0.00)
							Total			2021/12/31	\$1,000.00 (0.00)	\$1,000.00 (0.00)

COMMENTS

Approve

Decline

Revert to Prior Approver



Resources

For additional help with Kahua applications please reach out to the Technical team of the University with any questions

Submit a [Support Request](#) or email at servicedesk@uillinois.edu

UIC: (312) 996-4806

UIS and UIUC: (217) 333-3102