



Funding Training Document

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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.

Adding Optional Activity Codes

For all new projects in Kahua, an entire list of Activity Codes is available for use. For some earlier projects in Kahua, an abbreviated list of Activity Codes were loaded. If an additional Activity Code is needed in those projects, the PM or FM should submit a support request through the AITS Help Desk requesting the needed code be added to the project.

Funding Application - Budget

Create a Budget

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

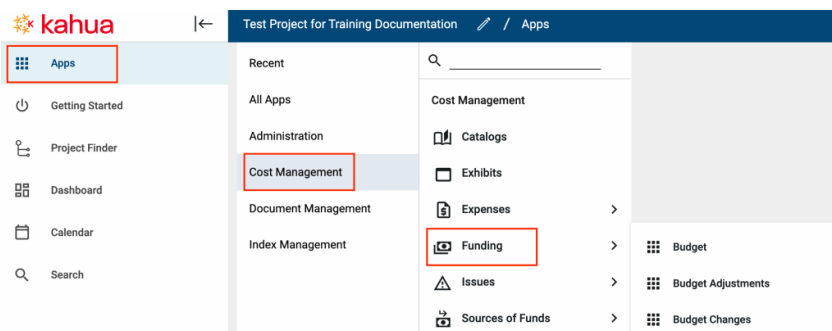
Roles in Approval Workflow: Project Manager, Financial Manager, Assistant Director, Director, Delegated Authority Levels.

The Budget application allows the Project Manager/Assistant Project Manager to establish a budget per project.

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

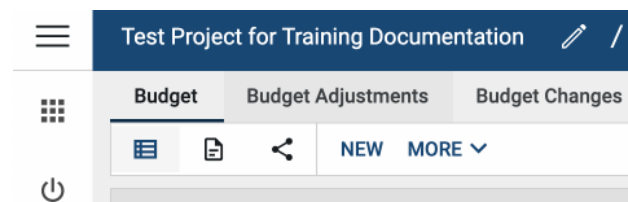
1. To access the Funding Budget application, open the Apps repository. Under the Cost Management suite of applications, click on **Funding**.

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 will open 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 these will populate for you as the budget routes through the 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, but you may choose to budget additional funds under an Activity Code in excess of executed contract totals (contingency) 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 to your budget, enter the number of lines you will need, then click **Insert**.
8. Select the applicable Activity 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 the more details  icon next to the Funding Budget Item number.
 - a. This view allows for additional detail on the item such as the Scope of Work, Notes, and additional Comments.
10. 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.
11. Click **Done** once all budget details have been provided.
12. 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)

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

[illegible]

- 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.
13. 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.
14. When you are ready to start the Review 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

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

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- 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

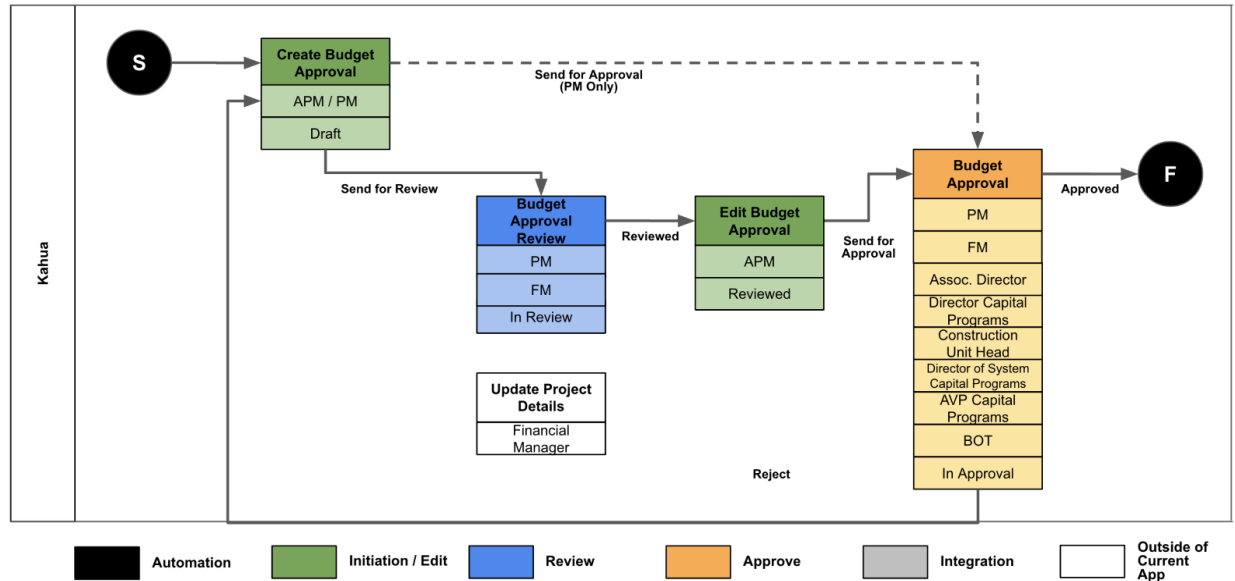
History

- 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, save, then Import into Kahua

Budget Approval Workflow



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	> \$1,500,000.01	None
6	Director of System Capital Programs	> \$3,500,000.01	None
7	AVP of Capital Programs & Utility Services	> \$3,500,000.01	None
8	Board of Trustees	≥ \$7,500,000	Unlimited

Send a Budget for Review

1. Once the Project Manager or the Assistant Project Manager has created the budget and clicked the **Send for Review** button, the review workflow is initiated.
2. The Budget will first be sent to the Project Manager for Review. 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.



3. Once the task is opened, the Project Manager will see an Approval Document similar to the image on the right.
4. The task will load the Portable View, which includes project details, milestones (if populated), and the proposed budget.
5. Once the Project Manager has reviewed the information and is satisfied with the details entered, click the **Reviewed** button to move the Workflow to the next step.

View

Task

View Source Record >

↑ 1 of 3 ↓

77%

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Budget to Approval: \$10,000.00

General Information:

Building:	Start Date:	1/1/2024	Project Manager:	Cross Migration
Title:	Status:	Active	Capitalized:	Capitalized
Floor:	Project Approval Status:		Research Project:	Yes
Room:	Project Approval Date:	1/1/2024	Project Category:	New Building
SAB:	Clearance Status:		CDE No:	A123
SABF:	Tracking:		CDB Year:	2024
Auto In Architecture:	Additional Bg Pt:	121	Renewed By Pt:	486
BF Cost:	Planner:		VFA No:	A12345

Scope Statement:

Testing the Portable View

Budget Increase Approvals

Approval Date	Approved Amount	Approval Status	Approval Title	Approval Description
	\$ 1,000,000.00	Approved	Test Budget - Self Approved	
1/5/2024	\$ 1,000,000.00	Approved	Testing Budget Variation	
1/5/2024	\$2,500,000.00	Approved	Testing of approvals	
1/8/2024	\$100,000.00	Approved	Testing List Portable View	Testing
	\$88.00	Approved	Test Budget Change - Self Approved	
1/8/2024	\$888,000.00	Approved	Budget changes by AFM for 1000000	Budget Revision

Funding Accounts

Description	Fund Source	Fund Name	College Fund	Expense Chart	Fund Code	Org Code	Program Code	Confirmed	Expenditure Date	Unencumbered amount	Revised Amount	Change Amount
Total	Operating Maintenance AFAP A Fee	PP 202F	AA	1	121	121	1234	Yes	1/8/1/2024	\$100,000,000.00	\$1,000,000.00	
									Total	\$100,000,000.00	\$1,000,000.00	

Charge Accounts

Chart	Fund	Organization	Program	Activity	Location	Percent	Notes
2				A077		0.00%	

Current Budget

> SECTIONS

APPROVAL DOCUM...

COMMENTS

REFERENCES

<< COMMENTS

Reviewed

Return for Revision

- a. If revisions are needed, the Project Manager can click the **Return for Revision** button, enter comments in the pop-up comment box, and send it back to the author for changes.
6. When the Project Manager has finished their review and moved it to the next step it will be sent to the Financial Manager.

7. The Financial Manager will receive an email and task in Kahua. The Financial Manager can review the details, project milestones, and proposed budget on the portable view in the task.
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.

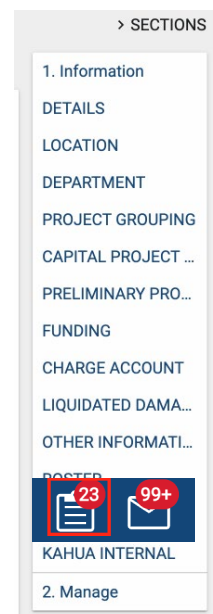


Test Project for Training Documentation



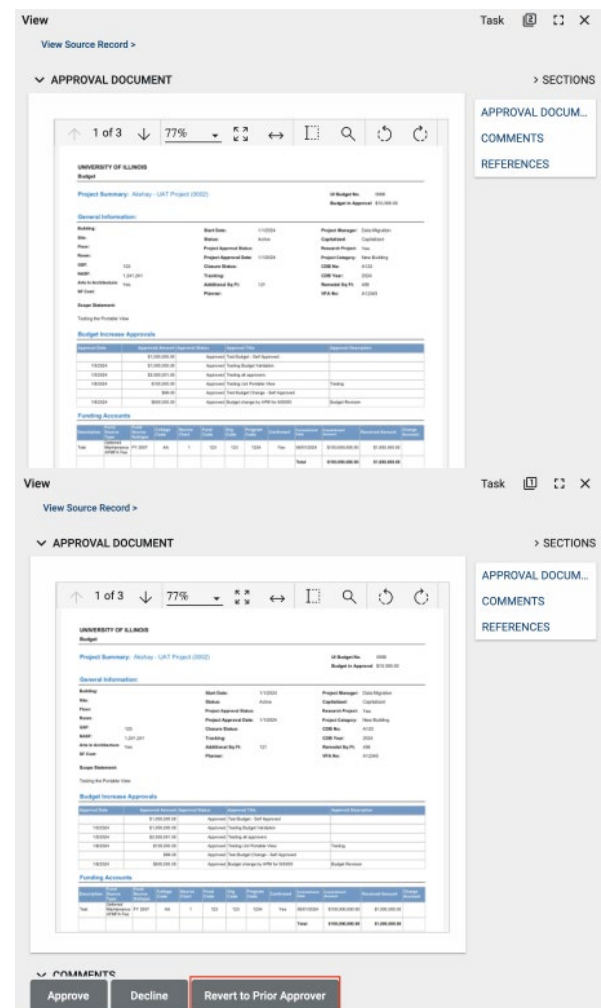
/ Apps

- a. To check or add funding, the Financial Manager should click the View Details Icon next to the Project Name. This will open the Project Details.
 - b. Click **Edit**, then using the Quick Navigation menu on the right-hand side navigate to the Funding Section.
 - c. Insert as many Funding Sources as required.
 - d. Navigate to the Charge Account section and enter the corresponding Charge Accounts if they are available.
9. Once the Funding information has been entered, and funding is verified sufficient to support the budget, navigate back to the Task using the Task icon located at the top right of the Kahua screen.
10. Complete the budget review, then click **Reviewed**.
11. After the Financial Manager has completed the review of the budget, the review process will be completed. 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 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. When the approver opens their tasks, they will see an Approval Document for review. The approver will have the option to **Approve** or **Decline** the Budget.
 - a. From the 2nd Approver onwards, they will see another button option, **Revert to the Prior Approver**. This option can be used for questions that could be answered by the previous Approver.
7. The Budget Approval process will follow a Threshold Based Approval as outlined in the Budget Approval Workflow Table.
8. Once all Approvals are complete, the Author/Creator of the Budget, as well as the Financial Manager, will be notified that the Budget has been approved.



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 activity code. Cost amounts are tracked in the Work Breakdown App according to status. Budget Adjustments is used for moving existing budget only, and the movement results in a \$0 change to the overall project budget. It is not used for increasing or decreasing a total budget in a project. For that process, see *Funding Application – Budget Changes*.

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:

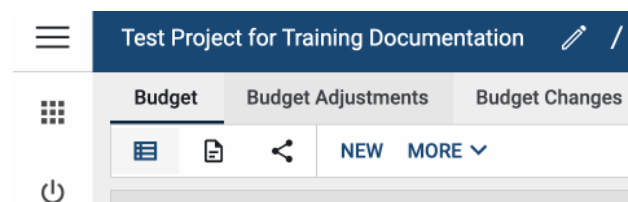
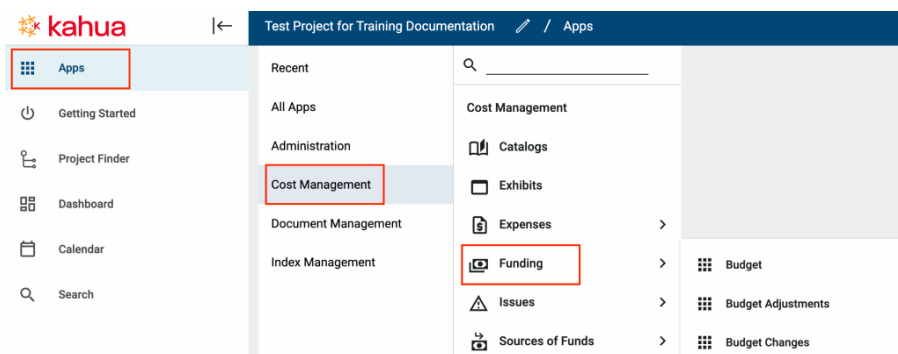
- a. Budget
- b. Budget Adjustments
- c. Budget Changes

3. To create a new Budget Adjustment, select the **Budget Adjustments** tab, then click the **New** button.

4. A new form will open 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 the 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 activity codes and fill out the remaining details regarding this budget adjustment.

- a. You will need to remove funds from one activity code and add funds to another activity code. 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)

		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 the more details  icon next to the funding budget adjustment item number.
 - a. This view allows for additional detail on the item such as the Scope of Work, Notes, and additional Comments.
 - b. Use the **Previous** and **Next** action buttons to sort through the Items if needed.
 - c. Click **Done** once all details have been entered.
10. 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

	TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	MARKUP?	INCLUDE ON SEND	INCLUDE MARKUP ON SEND	IS CURRENT	PREVIEW STATUS	COMMENTS
<input type="checkbox"/>											

- a. **Upload** a document saved on their computer.

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- 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.
11. Once all details have been filled out, click **Save/Close**.
 12. 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

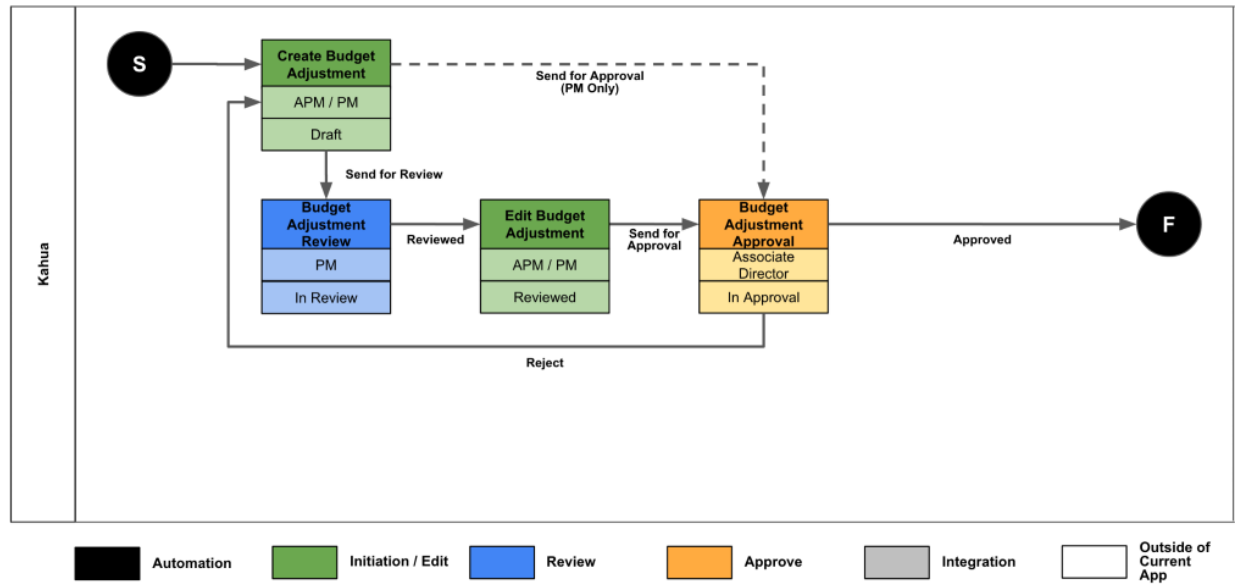
View

- 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

Budget Adjustment Workflow



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. 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 the Portable View as an Approval Document.
4. The Portable View will contain the data on the proposed Budget Adjustment.
5. The PM can also click **View Source Record** to review the data in the Budget Adjustment App. The PM may also navigate to the Work Breakdown App to view the entire budget with proposed adjustments. The PM must navigate back to the task when ready to complete the review.

6. When the Project Manager has gone through the information and is satisfied with the details entered, they can click the **Reviewed** button to move the Workflow to the next step.
 - a. If changes need to be made, the Project Manager can click the **Return for Revision** button, add revision comments in the comment pop-out box, and send it back to the Author for changes.

7. After the Project Manager has completed the Review of the Budget Adjustment, an email will be sent to the Assistant Project Manager and the Status will change to “Review Complete”.
8. 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, a review is not needed, and it can be sent directly through the Approval process by clicking the **Send for Approval** button.
2. If the Assistant Project Manager is creating the Budget Adjustment, the approval process can only start after the Review process is complete. See “Send a Budget Adjustment for Review” for more details.
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. The Associate Director will receive a Task in Kahua. When they open the task, an Approval Document will be presented for review with the option to **Approve** or **Decline** the Budget Adjustment.
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 Source Record >

Task

SECTIONS

APPROVAL DOCUMENT...

COMMENTS

REFERENCES

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UNIVERSITY OF ILINOIS

Project: Alton, 1st Project

UI Budget Adjustment No.: 2022

Description: Testing Budget Adjustment Portable View

Number: 0001

Date: 1/17/2024

Status: Pending

Reason: Redirection

Budget Notes: Testing

Dates:

Date Sent for Review: 2/7/2024

Date Reviewed: 2/7/2024

Date Sent for Signature: 2/7/2024

Date Authorized: 1/17/2024

NO	DESCRIPTION	ACTIVITY CODE	TOTAL
01	Construction	10000	\$2,360,000
02	Construction Total	10011	\$2,360,000
Total			\$0.00

Referenced Documents

TYPE	DESCRIPTION	CONTRIBUTOR	DATE
Supporting Document	0001 Testing of approval of funding request for project	Data Migration	1/17/2024 11:50 PM

COMMENTS

Approve Decline

Funding Application - Budget Changes

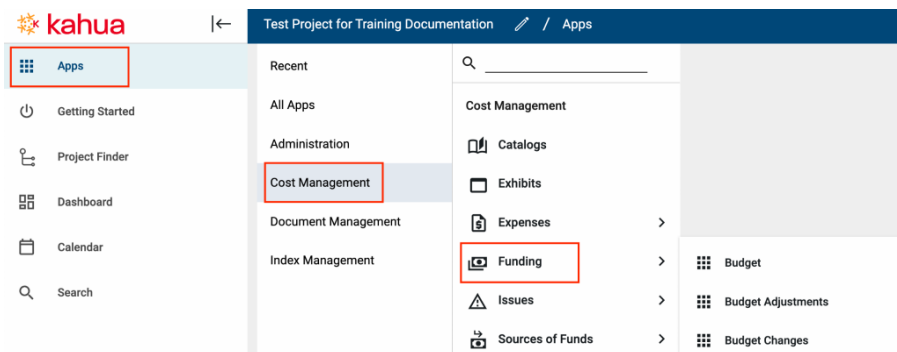
Create a Budget Change

The Budget Changes application allows you to add or remove 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.

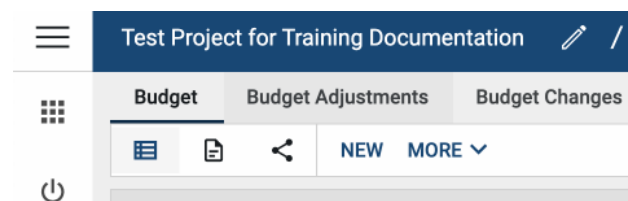
Cost amounts are tracked in the Work Breakdown App according to status.

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 will open 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 activity codes and fill out the remaining details regarding this record.

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

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

- a. This view allows for additional details on the item such as the Scope of Work, Notes, and additional Comments.
 - b. Use the **Previous** and **Next** action buttons to sort through the Items if needed.
 - c. Click **Done** once all detail has been provided.
9. Documents can be attached to the record under the References section. The user can either:

↑

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
--------------------------	--------	-------------	-------------	------	------	---------	-----------------	------------------------	------------	----------------	----------

- 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.
10. Once all details have been filled out, click **Save/Close**.
11. When you are ready to start the Workflow click **Send for Review**.

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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 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

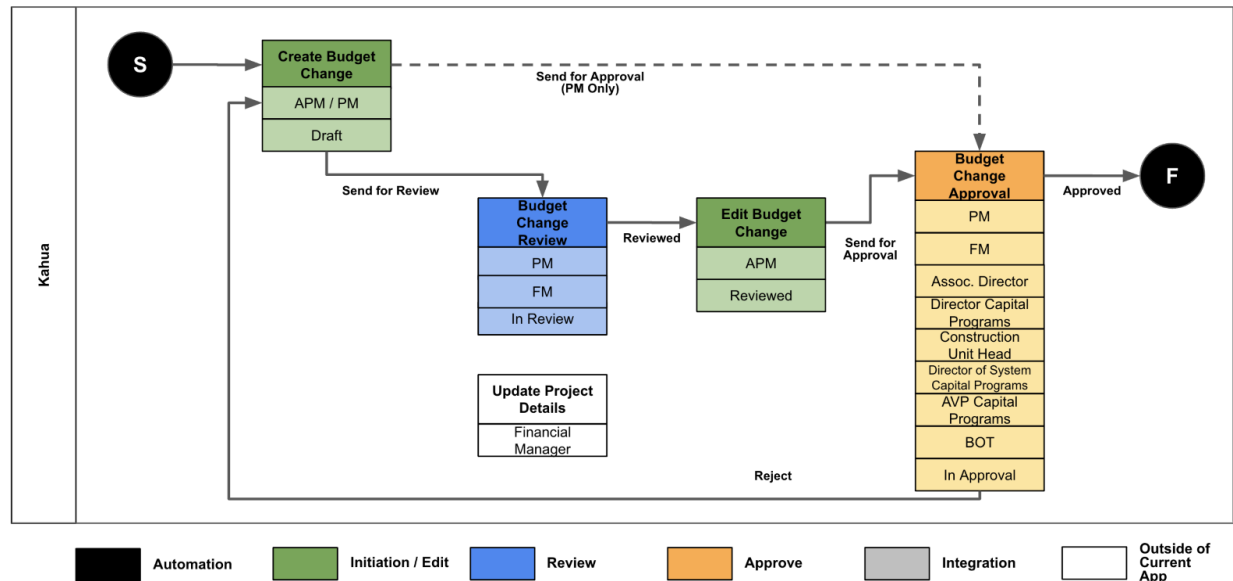
History

- 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

Budget Changes Workflow



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	> \$1,500,000.01	None
6	Director of System Capital Programs	> \$3,500,000.01	None
7	AVP of Capital Programs & Utility Services	> \$3,500,000.01	None
8	Board of Trustees	≥ \$7,500,000	Unlimited

Send a Budget Change for Review

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. 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 Portable View which will contain the data on the Project as well as the Budget Change being proposed.
4. When the Project Manager has gone through the information and is satisfied with the details entered, they can click the **Reviewed** button to move the Workflow to the next step.
 - a. If changes need to be made the Project Manager can click 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 for return can be entered.
5. When the Project Manager has finished their review and moved it to the next step, it will be sent to the Financial Manager.
6. The Financial Manager will receive an email and Task to Review the information.

View

View Source Record >

↑ 1 of 3 ↓ 77% ↺ ↻ ↶ ↷ ⌂ 🔍 🔄 🔄

Budget In Approval \$710,000.00

General Information:

Building: Site: Floor: Room: CAD: 103 NASD: 1,261,261 Air in Accidents: Yes SP Code:	Start Date: 1/1/2024 Status: Active Project Approval Status: Project Approval Date: 1/1/2024 Closeout Status: Tracking: Additional Bg Pf: 127 Planner:	Project Manager: Core Migration Capitalized: Capitalized Research Project: Yes Project Category: New Building CDE No: A123 CDE Year: 2024 Remoted By Pf: 456 VFA No: A123456
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Scope Statement:

Testing the Portfolio View

Budget Increase Approvals

Approval Step	Approval Amount / Approval Status	Approval Title	Approval Description
	\$1,000,000.00	Approval: Test Budget - Self Approval	
1/5/2024	\$1,000,000.00	Approval: Testing Budget Variance	
1/5/2024	\$2,500,000.00	Approval: Testing all approvals	
1/5/2024	\$100,000.00	Approval: Testing Link Portfolio View	Testing
	\$99.00	Approval: Testing Budget Change - Self Approved	
1/5/2024	\$500,000.00	Approval: Budget change by VFA by 500000	Budget Revision

Funding Accounts

Description	FUND Source Type	FUND CATEGORY	Source Class	Fund Units	Orig Units	Program Units	Continued	Document Date	Document Amount	Revised Amount	Change Percent	
Tot	Unassigned Maintenance	FY 2027	AA	1	103	103	1234	Yes	1/5/1/2024	\$710,000,000.00	\$1,200,000.00	
								Total	\$710,000,000.00	\$1,200,000.00		

Charge Accounts

Chart	Fund	Organization	Program	Activity	Location	Percent	Notes
2				AB27		0.00%	

Current Budget

7. 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.

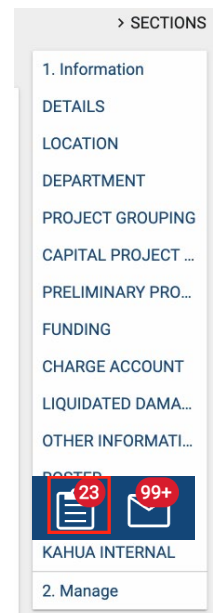


Test Project for Training Documentation



/ Apps

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



Send a Budget Change for Approval

1. The Approval process for the Budget Change can only begin after the Review process has been completed.
2. During the approval process the Budget Change 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 Change clicks on the **Send for Approval** button, the approval process is initiated.
4. If the Assistant Project Manager is the Author/Creator, the Budget Change will first go to the Project Manager for Approval.
5. If the Project Manager is the Author/Creator of the Budget Change, it will instead go to the Financial Manager for Approval.
6. The reviewer will receive a Task notification.

When they click the task, a screen similar to the Review Task will be presented with the option to **Approve** or **Decline** the Budget Change.

7. From the 2nd Approver onwards, they will see another button option to **Revert to the Prior Approver**. This option can be used to clarify any doubts that could be answered by the previous Approver.
8. The Budget Change Approval process will follow a Threshold Based Approval as outlined in the Approval Workflow Table.
9. Once all Approvals are done, the Author/Creator of the Budget Change and the Financial Manager will be notified that the Budget Change has been Approved.

The screenshot shows a web application interface for reviewing a budget change. The main content area is titled 'APPROVAL DOCUMENT' and contains a summary of the budget change for the 'UNIVERSITY OF ILLINOIS' project. The summary includes fields for 'Project Summary', 'Amount', 'Status', 'Project Manager', 'Project Approved Date', 'Project Category', 'Funding Source', 'Approved By', and 'Approved Date'. Below the summary, there are two tables: 'Budget Increase Approvals' and 'Funding Accounts'. The 'Budget Increase Approvals' table has columns for 'Amount', 'Status', 'Project Manager', 'Project Approved Date', 'Project Category', 'Funding Source', 'Approved By', and 'Approved Date'. The 'Funding Accounts' table has columns for 'Account Name', 'Account Type', 'Account Status', 'Account Balance', 'Account Date', 'Account Description', 'Account Location', 'Account Contact', and 'Account Email'. At the bottom of the screen, there are three buttons: 'Approve', 'Decline', and 'Revert to Prior Approver'. The 'Revert to Prior Approver' button is highlighted with a red box.