



QUICK REFERENCE GUIDE:

1.8 Funding: Assign to Items

Background:

Each item in a project must have only one fund package assigned to it. You can assign packages to items individually or you can assign a fund package to all the items in a category or all the items in the project at once, and go back and modify any individual items that have a different funding assignments. The **Project Funding Assignment** component allows Funding Users to assign project items to Fund Packages in the project.

Roles:

Funding User

Navigation:

Project Overview > Project > Project Summary

1. From Project Summary, select the **Funding: Assign to Items** quick link.
2. The Project Funding Assignment component contains a list of all the categories in the project (often there will only be one category) on the left. Each category row displays the Category ID and Description, and a number of radio buttons with labels to denote the fund packages to which the items in the category are assigned.
3. Each category row can be expanded by clicking the black arrow next to the category ID to list all the items in the category.
 - a. Once the categories are expanded to reveal the items, you will assign the items to the correct fund package.
4. Each item row contains radio buttons on the right to indicate the fund package to which the item is assigned and current values for the following fields:
 - a. Project Line Number
 - b. Item Number

- c. Unit of Measure
- d. Item Description (without Bid Schedule Supp Description or Roll Up Supp Description)

Note: Run the Engineer's Estimate report as a reference for items that have supplemental descriptions.

5. The right side of the component contains a list of all the fund packages assigned to the project. The information in this list is for reference only and cannot be changed from this screen. Click black arrow next to the fund package to expand the row and view the funding sources for each fund package.
6. Each fund package in the list is labeled alphabetically, beginning with the letter A. These labels correspond to the radio button columns in the category/items list on the left. Each category row contains a radio button column labeled Mixed, a radio button column labeled None, and a letter radio button column for each fund package in the project. Each item row contains a radio button column labeled None and a letter radio button column for each fund package in the project. For example, if a project contains three fund packages, each item row would have four radio buttons: None, A, B and C.
7. The system initially selects the None radio button for all categories/items that have not been assigned to a fund package.
8. To assign all the items in a category to the same fund package, select the appropriate Fund Package letter radio button on the category row. This will move all the item radio buttons to the same letter, assigning the same fund package to all the items in the category.
9. If there are multiple fund packages, select the radio button for each item that will assign it to the correct letter (column) and corresponding fund package. This will automatically move the category row radio button to Mixed.

If you need further assistance please contact your Module Admin

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NOTES:

- If all but a few of your items belong to the same fund package, to save time, assign the primary fund package to all items and then switch the fund package for the few that are assigned differently.
- If items are added to the project by a Project User after funding has been assigned by a Funding User, those items will appear with None as the selected radio button. Funding Users can edit item funding assignments as needed.
- If Fund Packages are added or deleted, remember to reassign or double check the item funding assignments.

10. Click **Save** when finished assigning items to funding.

Next Steps:

See QRG – *Project Validation*