To move funds between colleges, select up to two more colleges.

User can propose multiple changes in the same request.

Select primary college.

Review minor works project data at any time.

Update project schedules while making other changes or independent of any changes.

Make changes:
- MOVE Funds Between Projects
- ADD New Project
- Update Project Schedules

Finish:
- Submit Request
- Exit
Review currently funded projects

Select project ID to see related data
Move funds between existing projects

Select project ID of project with funding shortfall

Enter additional funding amount required to complete project

Select why funds are needed

Identify an existing project that needs additional funding

Why is my project missing from this list?

Project Description

Select Reason for Need

Back

Identify funding sources
Add a new project

Select appropriation where funds will come from. If not sure, click “Help”

Select campus and building location of new project

Enter project description. Click “See Example” for help.

Enter total expected project cost

Select why project is required
Select project with excess funds. Multiple projects can be selected one at a time.

Enter how much funding from the currently selected project that will be re-purposed.

Select why funds are available

After fields are populated, a button will appear here to add the amount to the total re-purposed amount.

As funds are identified above (from one or more projects), the “total amount identified” is updated. When the amount identified equals the amount needed, the difference will be zero and the gauge to the right will read “full”.
Use these buttons to cycle through all of the project changes to verify accuracy before submitting the request.
Review schedule milestones

Click to view expenditures and possible project delays

Edit project schedules

Reset all changes to schedule
Modify schedule milestones

Select project here. Only one project can be updated at a time (by clicking “Update Project Schedule” below).

Edit schedule milestones by clicking “Revise” checkbox. This will open a date-picker.

Click checkbox if project is on schedule. Current date will be automatically entered.

Save changes and exit

Exit without saving changes
Review expenditures and estimated progress

Navigate back to project schedule screen.

Red portion of bar chart indicates possible project delays based on estimated spending assumptions stated below and schedule milestones.

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Notes:
1. Expenditure data is from previous month close and could be up to 30 days behind actual.
2. Assumed expenditure pattern: 12% total spent at end of design, 14% at bid and 100% at end of construction.
3. Based on schedules provided by college.
**Problem 1:** Excess minor works repair funds cannot be used for a program project that is short on funds or vice versa (Capital budget bill won’t allow).

- College wants to increase the scope of work for an improvement project (program).
- One or more repair projects have been completed and have excess funds.
- The repair funds cannot be moved to the program project because they are funded by different appropriations.

**Solution:** Use excess repair funds for repairs identified in the program project scope of work.

- Identify portions of the program project that are repair in nature (upgrades do not qualify).
- Add new project(s) to the “repair” appropriations for each component identified in the program project that can be considered repair work.

  OR

- Create new program projects that include repair scope of work if excess funds are in a program project.

**Problem 2:** College cannot use excess project funds for a new project since the amount is less than $25,000 (new project minimum is $25,000).

**Solution:** Combine projects with excess funds to create new project.

- If there are multiple projects within an appropriation that each have less than $25,000 in excess funds and they total more than $25,000 when combined, then the funds can be combined and re-purposed.