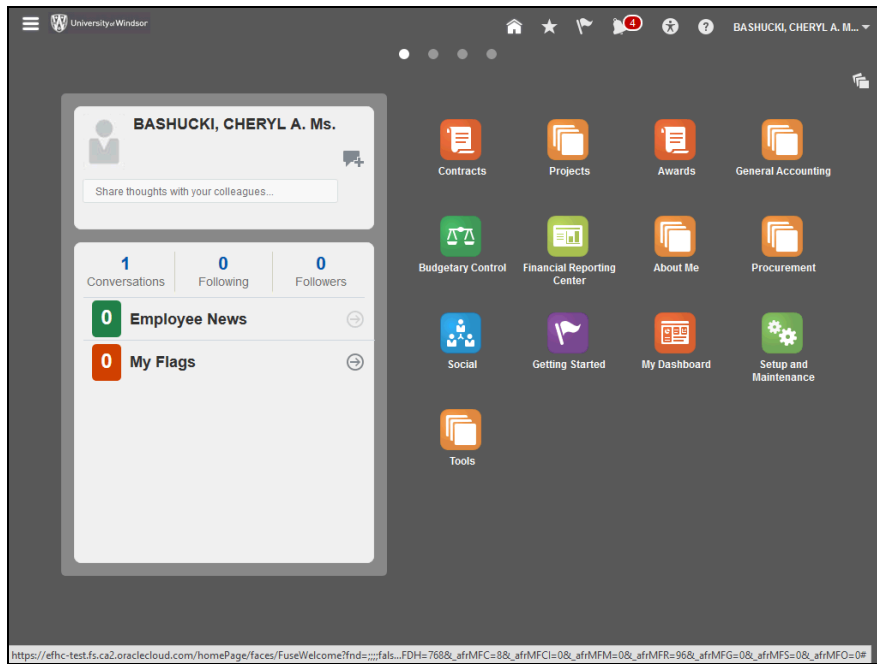



PCM 02: Manage financial project plan - Part 1
Created on 2/28/2018

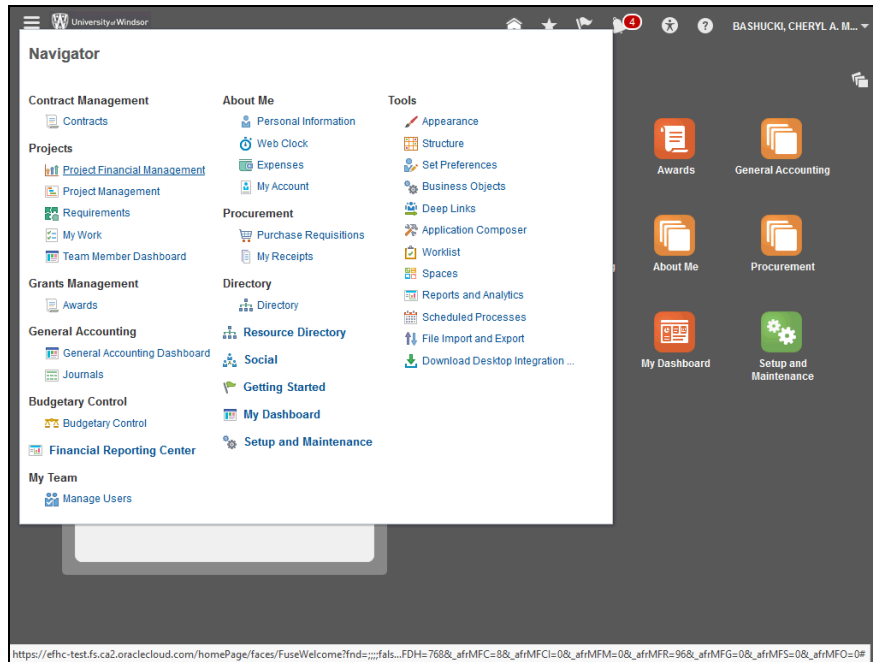
PCM 02: Manage financial project plan - Part 1

Procedure

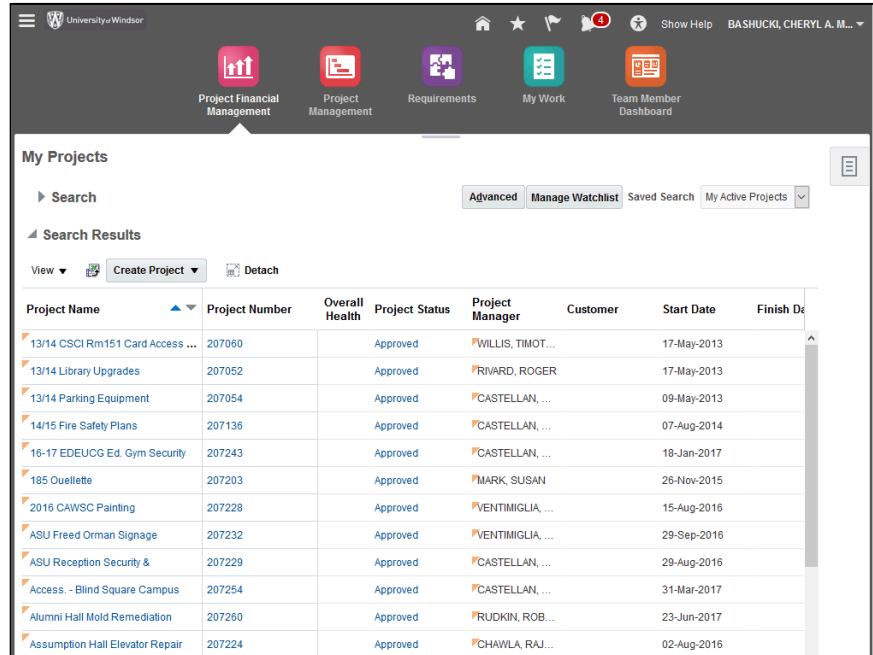
This User Guide outlines the steps required to manage a financial project plan - Review / create new tasks and assign planning resources. Planning resources are added to the tasks in order to assign financial budgets.



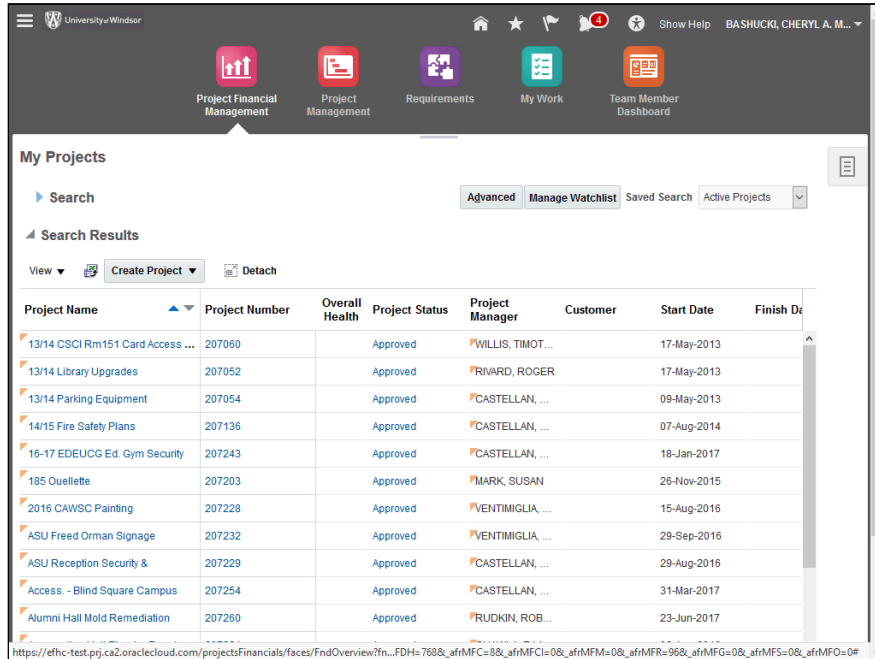
Step	Action
1.	Click the Navigator button. 



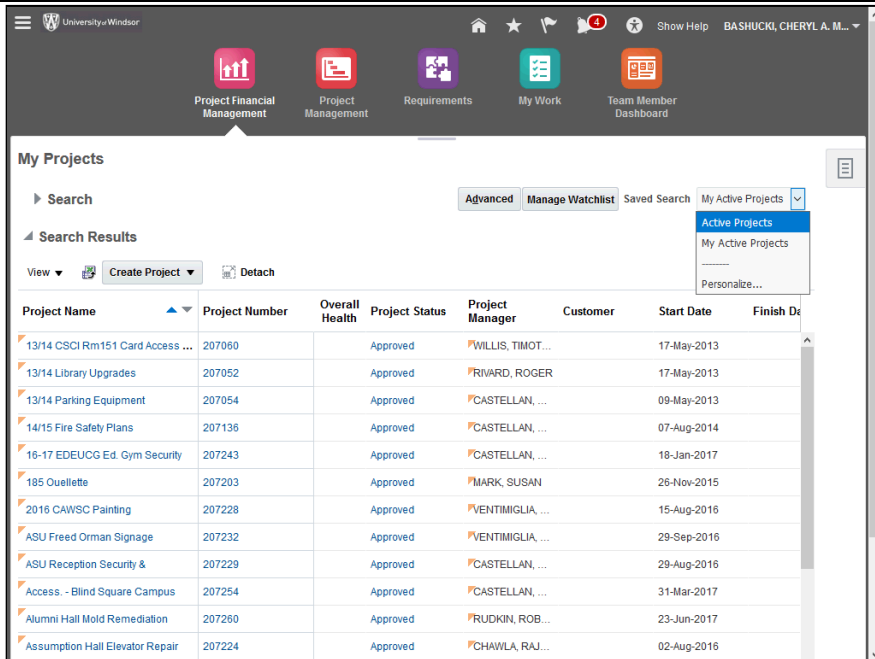
Step	Action
2.	Click the Project Financial Management link. Project Financial Management



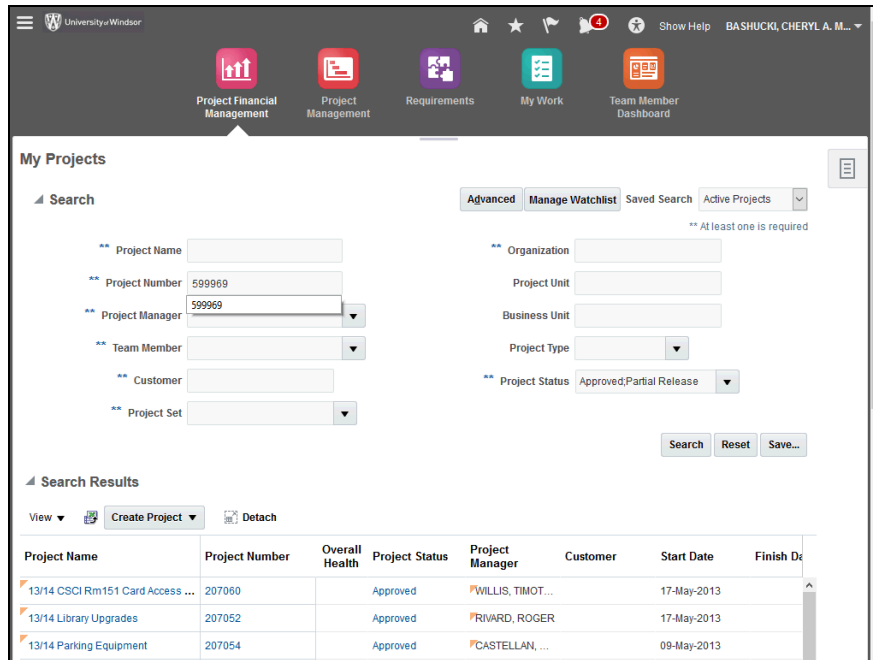
Step	Action
3.	Click the My Active Projects drop-down button. Select the required option from the drop-down list.



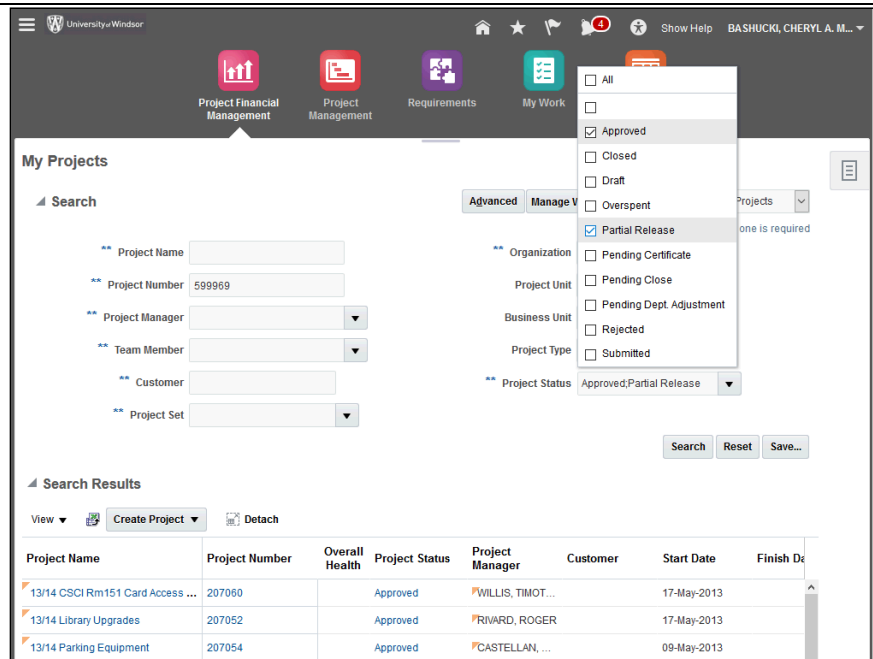
Step	Action
4.	Click the Expand Search button.



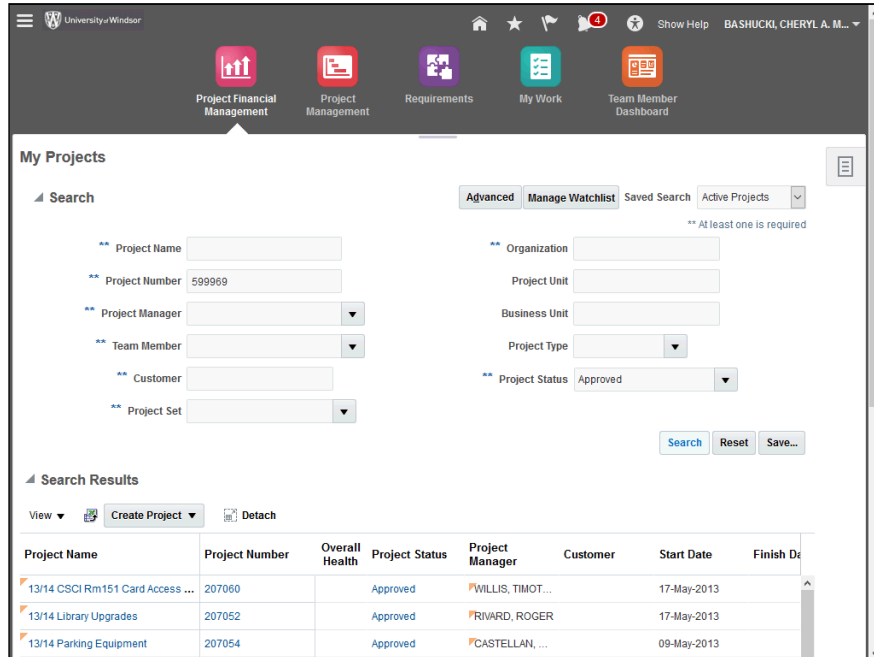
Step	Action
5.	Enter the required number in the Project Number field.



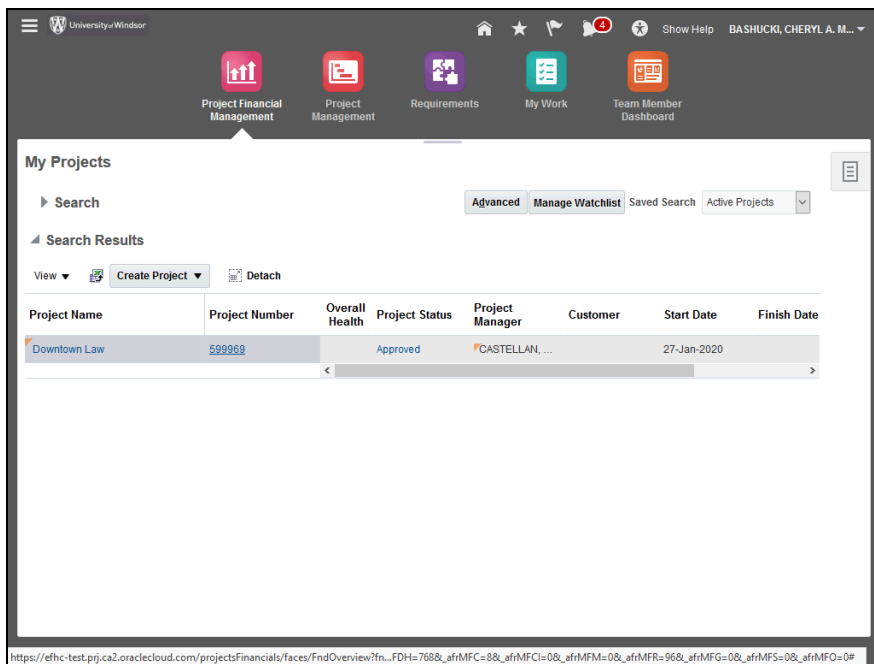
Step	Action
6.	Click the Project Status drop-down button to change selection in the Project Status field.



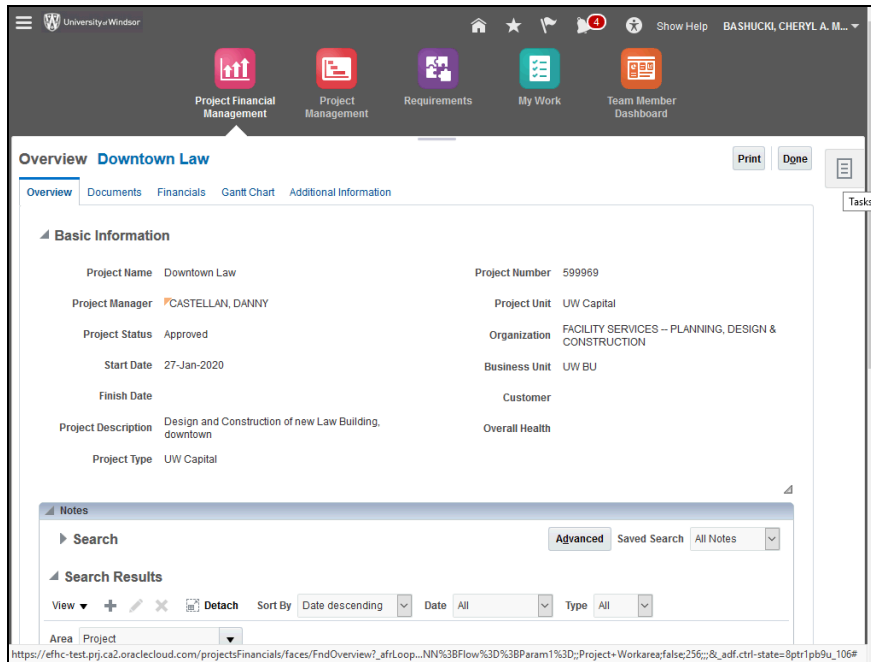
Step	Action
7.	Deselect the Partial Release option.



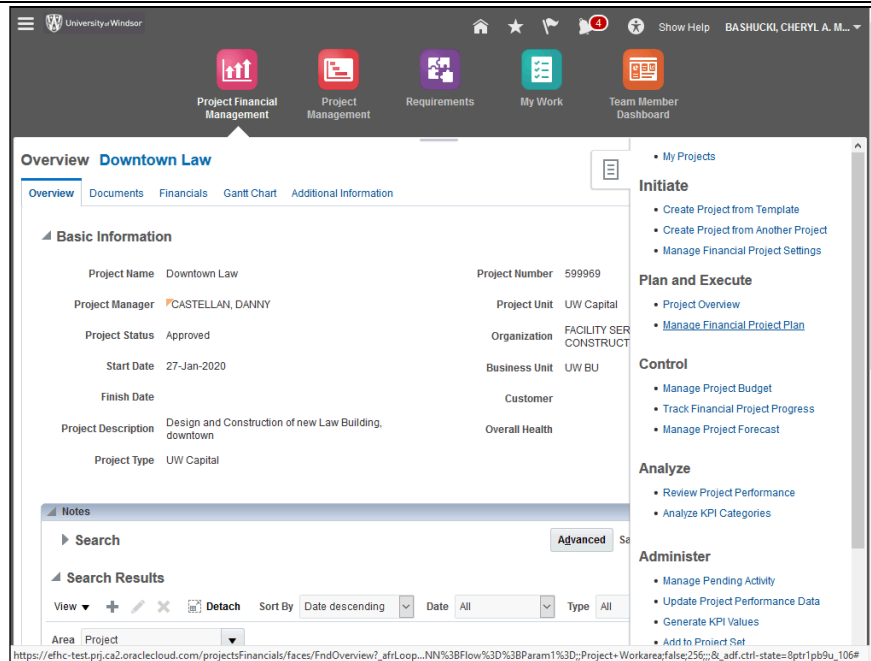
Step	Action
8.	Click the Search button.



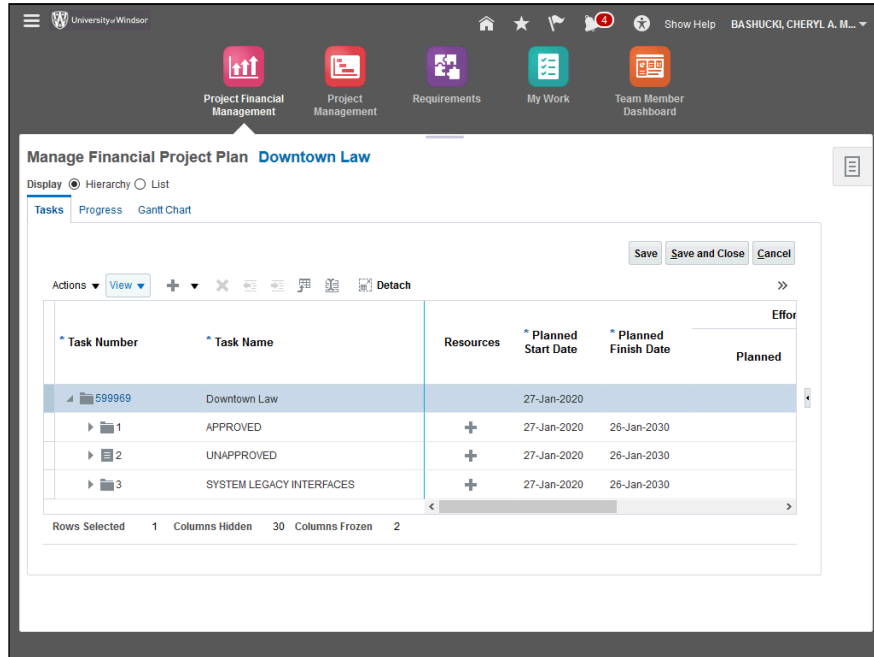
Step	Action
9.	Click the Required Project link.



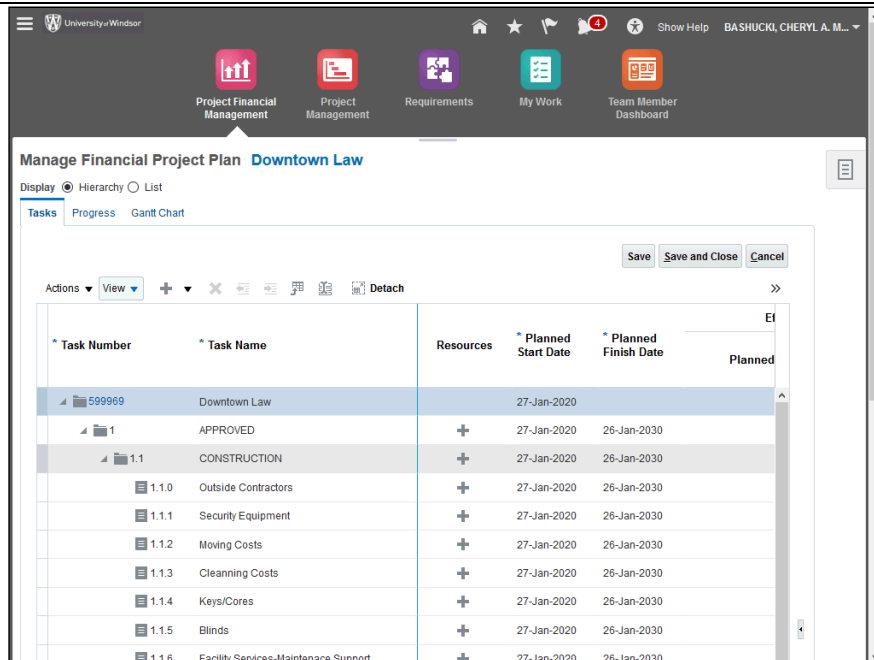
Step	Action
10.	Click the Tasks button.



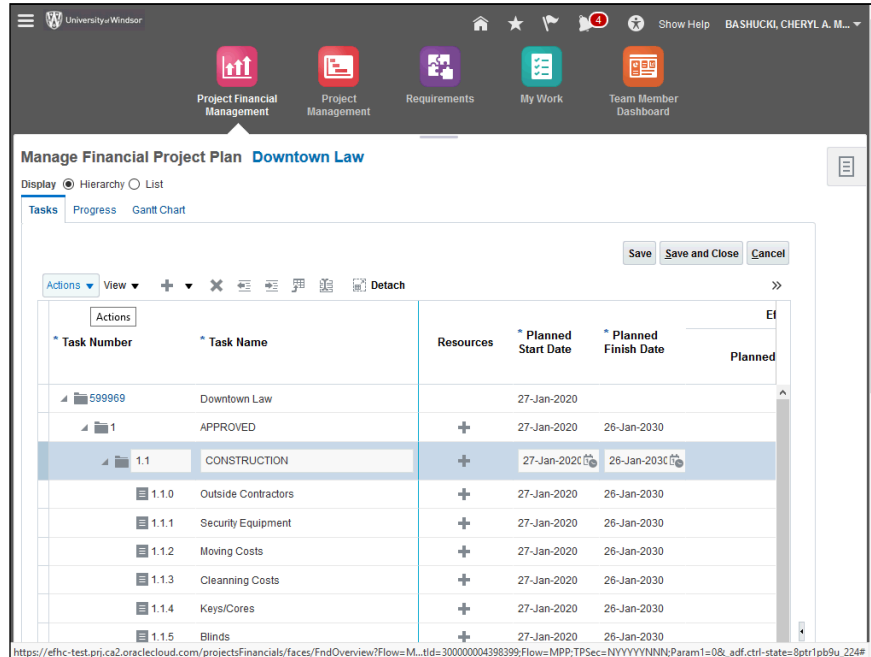
Step	Action
11.	Click the Manage Financial Project Plan link. Manage Financial Project Plan



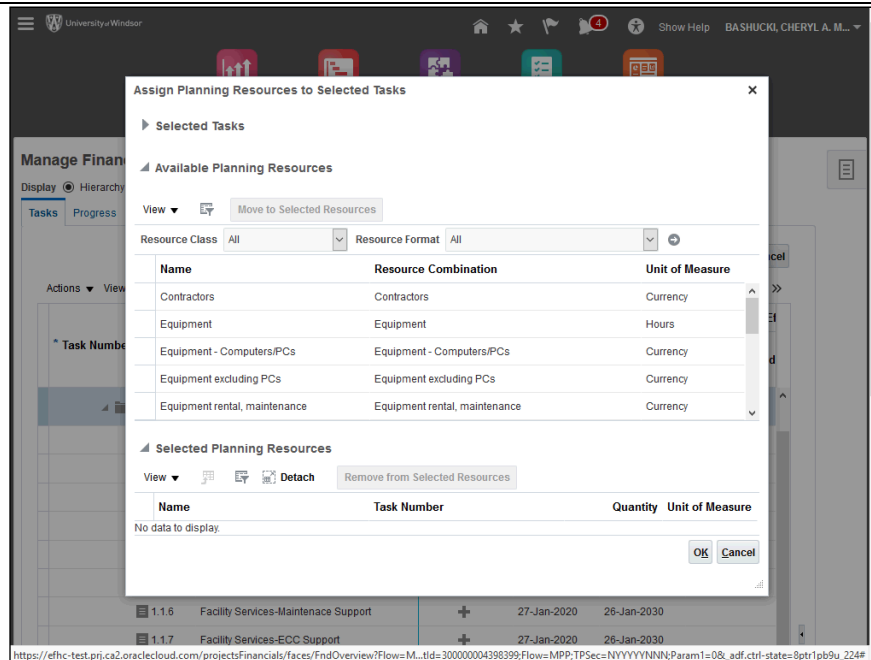
Step	Action
12.	Click the View drop-down button. Select the Expand All option from the drop-down list.



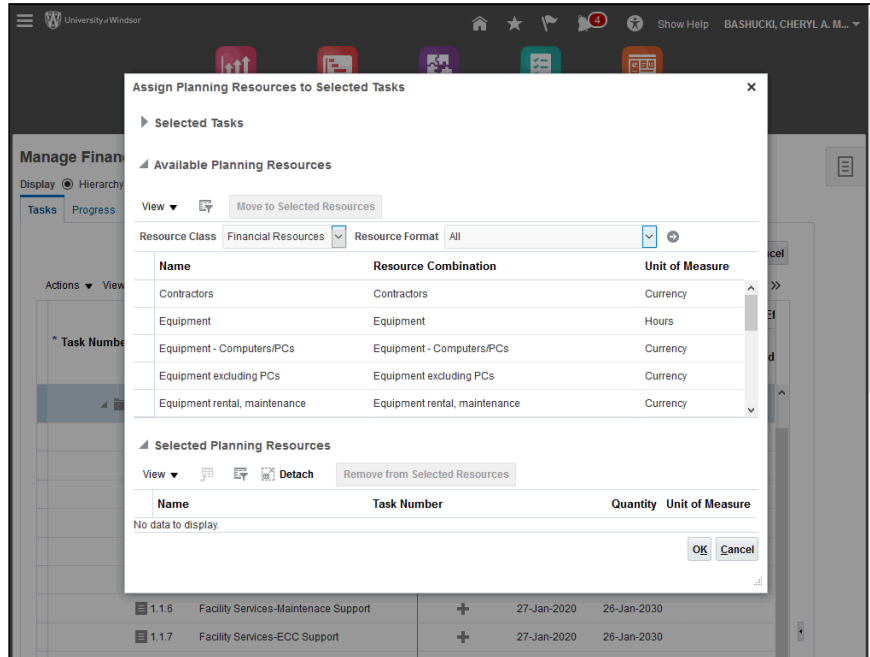
Step	Action
13.	Click the Left Selection Area to select CONSTRUCTION .



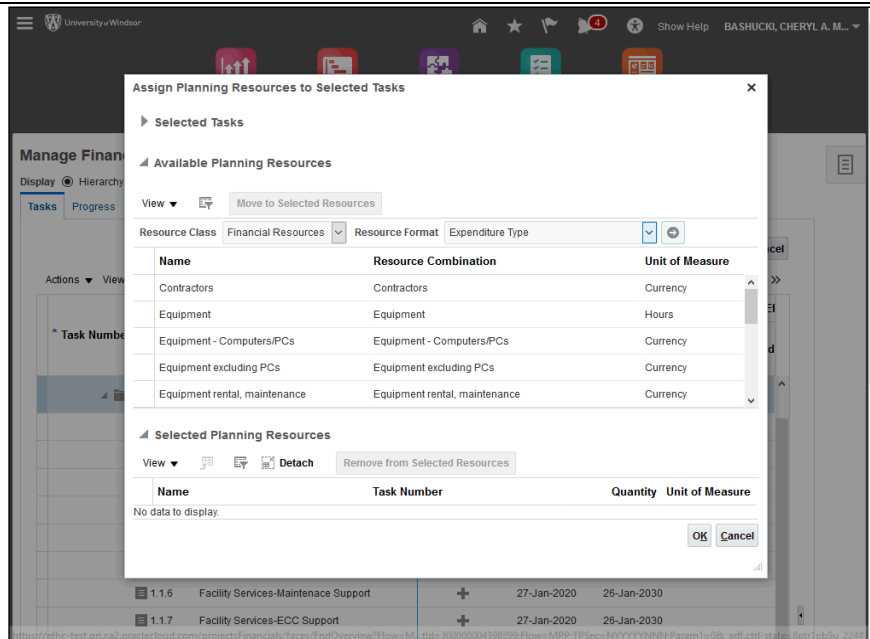
Step	Action
14.	Click the Actions drop-down button. Click the Assign Planning Resources to Selected Tasks field.



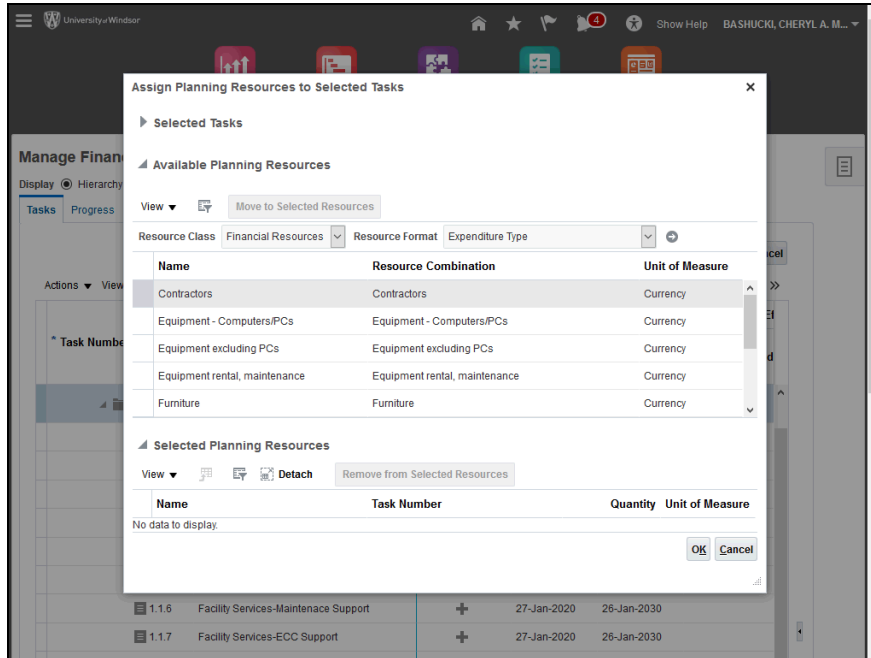
Step	Action
15.	Click the Resource Class drop-down button. Select the Financial Resources option from the drop-down list.



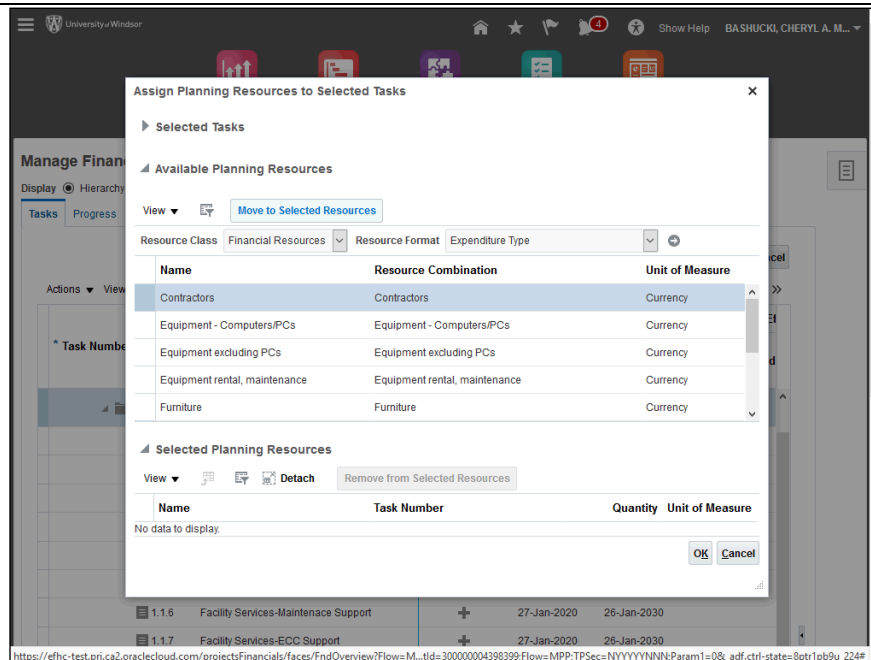
Step	Action
16.	Click the Resource Format drop-down button. Select the Expenditure Type option from the drop-down list.



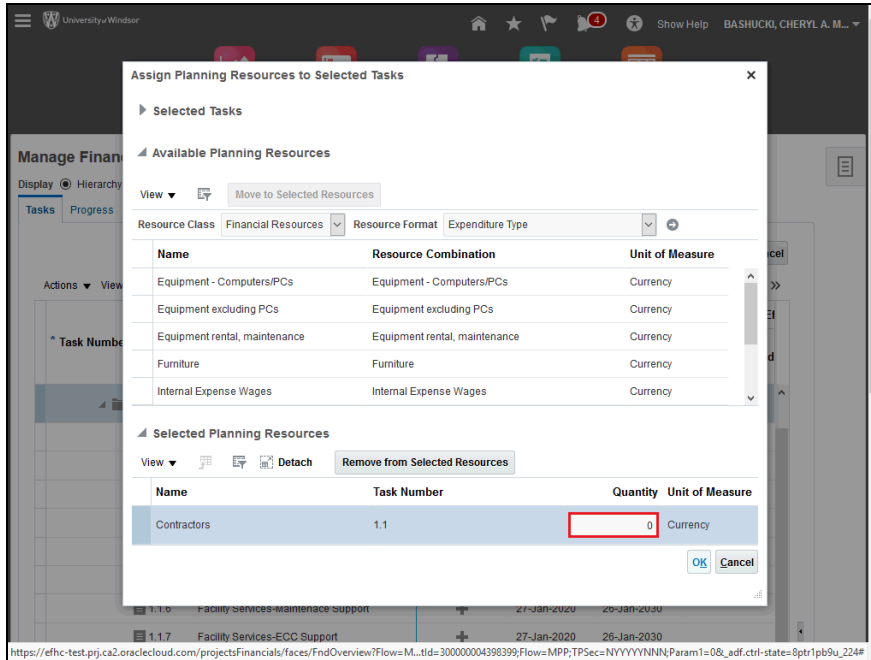
Step	Action
17.	Click the Search button.



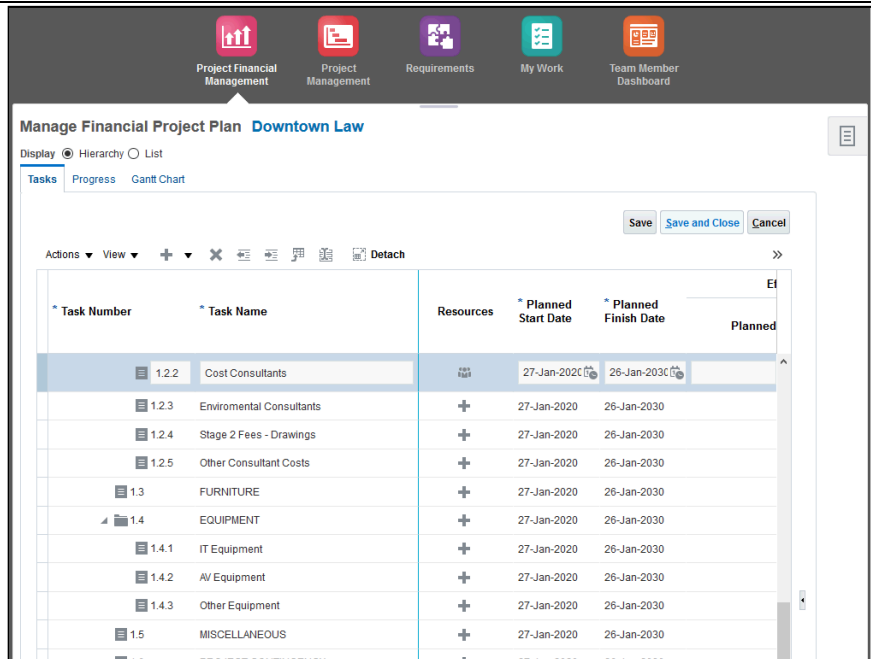
Step	Action
18.	Click the Left Selection Area to select Contractors .



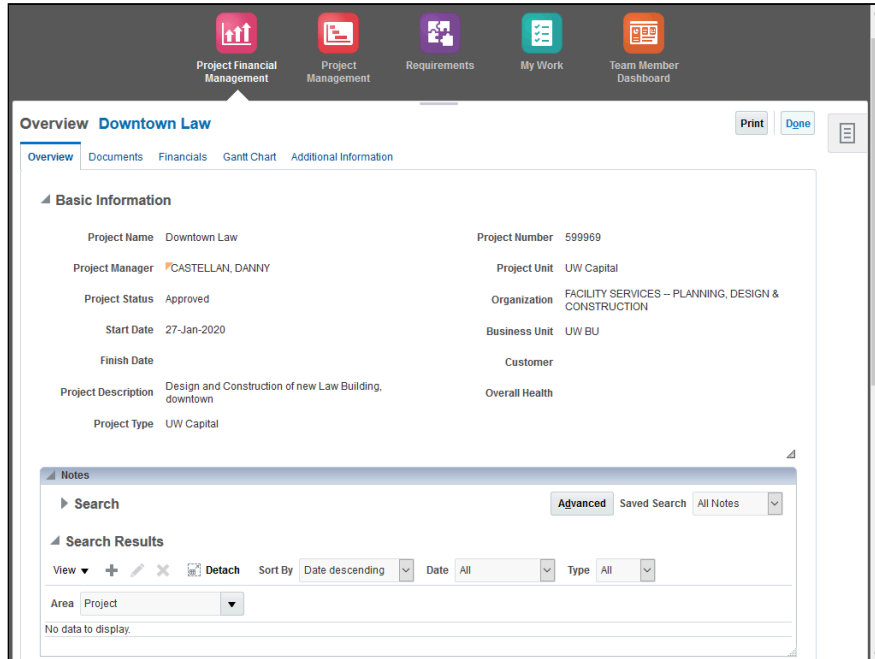
Step	Action
19.	Click the Move to Selected Resources button.



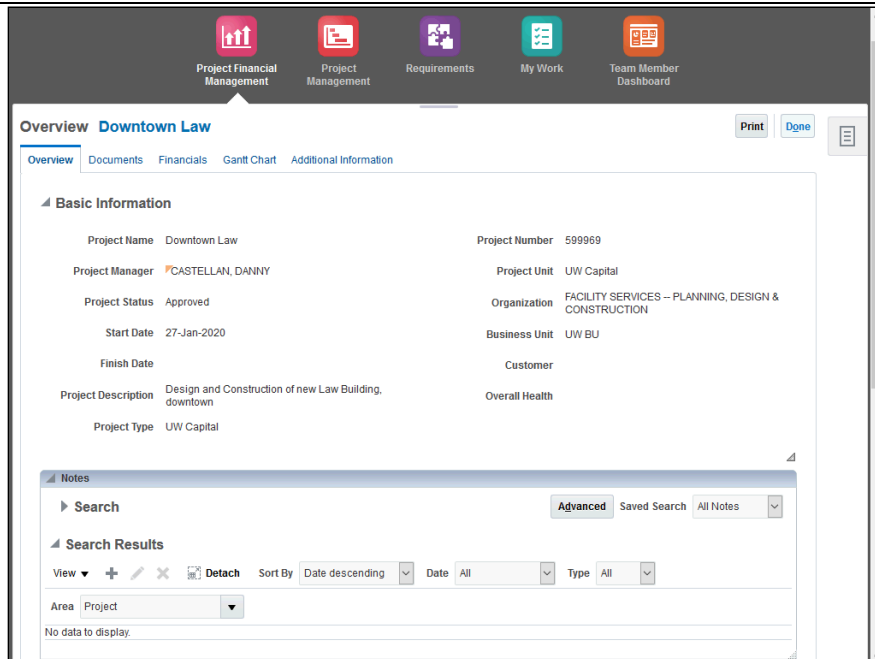
Step	Action
20.	You can also enter the planning amount in the Quantity field at this time. Click the OK button. OK



Step	Action
21.	Click the Save and Close button. Save and Close



Step	Action
22.	Click the Done button. Done



Step	Action
23.	End of Procedure.