



QUICK REFERENCE GUIDE:

8.3 Adding Funds

Background:

Unlike Fund Packages that can be created from scratch, Funds that need to be added to the Fund Packages on a project must be added to the Fund reference data. Prior to creating a fund make sure to discuss with Project Control and/or the AWP Implementation Team.

Roles:

Module Admin

Navigation:

Reference Data > Funds

1. Select the **Funds** link.
2. Expand the Fund Overview component action menu and select **Add**.
3. Click the **New** button.
4. In the **Fund ID** field, enter a description or short description of the funding source.
5. In the **Fund Description** field, enter the description of the funding source (will be same as Fund ID nearly always).
6. In the **Fund Type** dropdown, select the type of fund.
7. In the **Percentage** field, enter 100.
8. Click **Save**.

If you need to delete a fund you created in error:

1. Click the **Previous** button (or dropdown arrow) and return to the Fund Overview component.
2. Search for the fund you want to delete.
3. Expand the row action menu and select **Delete**. The fund record is marked for deletion and users may “undo” the action until the user clicks **Save**.

Note: You cannot delete a fund that has been used on a project. AWP will give you a red error message.

Next Steps:

N/A

If you need further assistance please contact your Module Admin
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