

ePM Quick Reference Guide #84

Creating Appropriations for Capital Projects

WHAT IS...

Capital projects should create appropriations in ePM once appropriations funds are received from Congress. Appropriations that entered in ePM are displayed on dashboards and ePM reports.

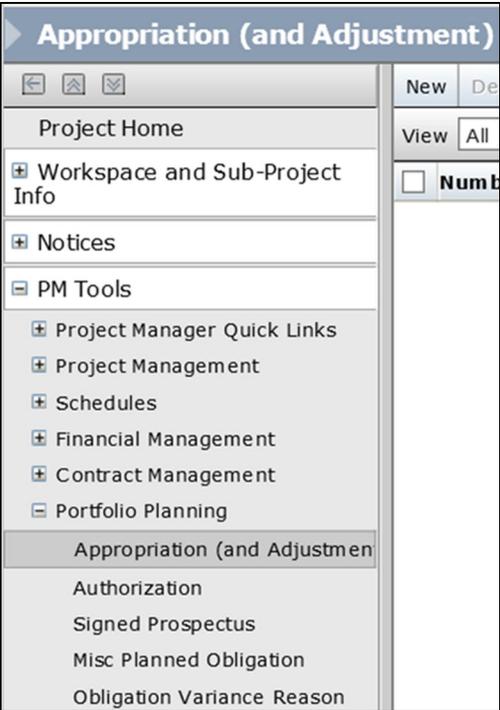
WHO USES

- Project Manager
- Budget Analyst

HOW TO...

CREATE PROJECT APPROPRIATIONS

1. Log into ePM and navigate to 'PM Tools' in the left-hand menu.
2. Expand the 'Portfolio Planning' menu and choose 'Appropriation (and Adjustment)'.



3. Click 'New' to begin creating the Appropriation.
4. In the Prospectus: New Document window, enter the:
 - Appropriation title

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- Public Law
- Budget Activity

The screenshot shows the 'PROSPECTUS: New Document' form in the 'General' tab. The 'Current State' is set to 'Draft'. The 'Title *' field is empty. The 'Number' field contains a hyphen followed by an empty box. The 'Notes' field is a large text area. The 'Fiscal Year' and 'Public Law' fields are empty. Below these are sections for 'CONTRACT DATES' and 'CONTRACT UDFs'. The 'Date Entered' field is set to '31 January, 2020'. The 'House Approved Date' and 'Senate Approved Date' fields are empty. The 'Adjustment Type' and 'Budget Activity' fields are empty.

5. Click the Schedule of Values page and click 'Add.' In the new line that appears, enter the:
 - Line Number
 - Description
 - Scheduled Amount
 - Function Code Type: Studies, Design, Site Acquisition, Construction, M&I, Construction-Admin, or Admin

The screenshot shows the 'PROSPECTUS: New Document' form in the 'Schedule Of Values' tab. The 'Display Columns' dropdown is set to 'All'. The table below has the following columns: Line Number, Description, Scheduled Amount, and Function Code Type. A single row is visible with a scheduled amount of 0.00.

Line Number	Description	Scheduled Amount	Function Code Type
		0.00	

6. Click 'Save.'
7. Click 'Workflow' and choose 'Set to Pending.' The authorized approver will then approve the Appropriation.



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REFERENCES

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs are accessible through the [ePM Portal](#).

- QRG 31 - Funding Document Creation
- QRG 32 - Funding Document Approval