

IBM TRIRIGA  
Version 10 Release 5

*Program and Project Management  
User Guide*



**Note**

Before using this information and the product it supports, read the information in "Notices" on page 29.

This edition applies to version 10, release 5, modification 0 of IBM TRIRIGA and to all subsequent releases and modifications until otherwise indicated in new editions.

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## Chapter 1. Managing programs and projects

IBM® TRIRIGA® offers a suite of tools that automate, streamline, and manage the full array of capital project processes, tasks, documents, design, changes, cost, risk, and schedule management.



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## Chapter 2. Program and project management for capital projects

The IBM TRIRIGA program and project management process automates, streamlines, and manages capital project processes. You can manage all aspects of a capital project, from project setup to the execution and closeout of the project.

Project management consists of lower-level tasks that are related to achieving goals specific to a capital project. For example, these goals might include planning, budgeting, allocating resources, and tracking projects.

Program management is the higher-level management of multiple capital projects. Programs provide oversight to the capital projects and align project objectives with overall business goals.

For instance, a university plans to renovate the roofs on all of its buildings. Reroofing all of the buildings is a program, and each individual building is a separate project.

The program and project management process includes any personnel who are responsible for setting up, tracking, maintaining, or managing projects.

Program and project management process is designed to ensure the completion and proper management of a project.

The following steps show the program and project management process:

1. Program setup consists of setting up funding for the projects included in the program.
2. Project setup includes creating cost codes, templates, and creating a capital project.
3. Planning projects involves building and reviewing designs and managing project risks, roles, and budgets.
4. Project procurement consists of bidding, standard contracts, requests for quotes, and purchase orders.
5. Project execution includes managing, authorizing, starting, and completing work. This step includes tasks like managing requests for information and potential change orders. This step also requires the delivery of materials and the supervision of progress and budgets.
6. Project and program closeout includes a punchlist, checklists, and transferring any funds that remain.





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## Chapter 3. Setting up projects

Before a project begins, you can create templates and cost codes to save time throughout the program and project management process. Templates ensure that the data is consistent for all projects. Cost code structures track and streamline the financial activities that take place within an organization.

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### Templates in the project management process

A template provides a repeatable pattern for a project. Many projects are similar in their requirements and execution.

#### Approval templates

define roles and identify people who either approve or reject a project or an aspect of a project. This type of template defines approval requirements, rules, and the type of review that is required. You can use this template to generate this information into a project. To create an approval template, go to **Tools > Approvals & Notifications > Approval Templates**.

#### Project Original Budget templates

are another type of program and project management template. This template is often associated with capital projects because you can predefine cost codes within the template.

#### Capital Project templates

are repeatable information that you can use to put information into capital projects. In the Budget section of this template, you can apply the project original budget template to generate the cost code structure.

You can create a Project Original Budget template, a Capital Project template, and many other templates when you go to **Tools > Administration > Templates**.

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### Cost codes

You use cost code structures to track and streamline the financial activities that occur within an organization. Because financial activities are often complex, cost codes are categorized into hierarchical sublevels.

In the **Contracts > Set Up > Cost Codes** page, you can designate single or multiple coding structures to define budgets and commitments. For example, a project can have budgets for developing the foundation of a building, for erecting the building, and for creating the interiors. The cost codes can help to track budgets and commitments for each of these activities.

### Creating standard capital project cost code templates

You can create a standard capital project cost code template. You use this template to generate a project cost code structure when you activate a capital project.

#### Procedure

1. In the Menu bar of IBM TRIRIGA, select **Contracts > Set up > Cost Codes**.
2. In the hierarchy pane, select **New > Standard Capital Project Cost Code**.
3. Enter the cost code data for a standard capital project.
4. Select **Create Draft** and save.



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## Chapter 4. Creating programs

You create a program to coordinate objectives for multiple related projects. Programs facilitate the planning, management, and oversight of the various projects. For example, the finances for all projects would roll up under the program, and the program would maintain a master schedule of the key project dates.

### Procedure

1. Select **Projects** and go to **Programs**.
2. Go to the **Related Links - Program > Programs and Funding Sources > Create a Program**.
3. Enter the program data on each of the tabs, and select **Create Draft**.
4. Issue the program.



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## Chapter 5. Creating capital projects

Creating a capital project is a process that you can use to manage, add, and define aspects of a project like the project scope, schedule, budget, tasks, and roles. For example, you can define a project team and security access for each team member.

### Procedure

1. In the Menu bar select, **Projects > Capital**.
2. In the Related Links portal, select **Projects > Create a Capital Project**.
3. Enter the capital project data on each of the tabs, and select **Create Draft**.
4. Optional: To apply a template, select **More**.
5. Activate the capital project.



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## Chapter 6. Planning and managing projects

Planning and managing projects is an ongoing process throughout the project lifecycle. You make plans for items such as budgets, schedules, and designs, then you manage and track these items. All aspects of planning and managing a project aim to achieve targets within financial, time, and other constraints.

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### Budget management

Budget management includes acquiring funds through funding sources, estimating projects cost, and tracking those costs.

#### Funding sources

Funding sources are budgetary resources for programs and projects. Funding types include grants, bonds, federal or state awards, private donations, or internal money that is allocated for a company or an organization.

A funding source record provides details about the funding organization, start and end dates, and the fund totals and allocations. For many cases, you must identify funding and have it approved before a program or project can begin. Funding sources might be required by federal and state agencies, corporations, and not-for-profit organizations such as universities, libraries, and museums. Funding sources are identified and accounted for to ensure that a project is adequately funded and so that the funds are committed to the purpose that they were made for.

Funding sources for a project do not necessarily use the same currency as the project. When the funding allocations are approved, sources that use a different currency are converted to the currency used for the project.

You can create or view a funding source record when you go to the project level, select a project, and go to **Related Links - Capital Project Budget > Program and Funding > Funding source**.

You can also create or view a funding source at the company level when you go to the Projects page and select **Capital > Related Links - Capital Projects > Programs and Funding Sources**.

#### Original budget estimates

You prepare the budget estimate before the start of a project. In the project level of IBM TRIRIGA, after you select a project, you can go to the Budget page. During project lifecycle, when you estimate a budget, you can create project original budget records, anticipate the changes and forecasts of a budget, and transfer and reassign budgets.

##### Budget records

Budget records specify the costs that are earmarked for a project, anticipated costs throughout the project, and transfers and changes in the budget. You create budget records on the Budget page.

##### Project original budget records

Specify the budget amount that is initially earmarked for a project. This

value is measured in the currency that the overall capital project cost uses. You can define the overall cost of a project by associating various cost code records.

For instance, a sum of \$1,000,000 is defined as the capital outlay for a project. This amount is broken into various components because of the requirements of the project. For example, \$25,000 might be expended for buying the raw materials and \$50,000 for the labor services that are involved. These expenses can be specified under cost codes that are created for this purpose. With this breakdown, you can manage the stipulated amount that is defined for the project.

#### **Project budget forecast records**

Document the anticipated cost of a project. Forecasts can be made periodically in the course of the project as conditions and expectations change.

The Project Budget Forecast record is an estimated amount, which can be above or below the original estimated cost of the project. The forecast is based on analysis of factors that are involved in the project, and is used to track changing projections. All forecasts use the same currency that is used for the project that the budget belongs to.

#### **Project budget transfer records**

Reassign budget funds within the same funding source. This record facilitates the transfer of money that is assigned from one cost code record to another. A project budget transfer record can be used to move funds between budget line items. After you transfer a budget, and it is approved, it becomes the revised budget.

For example, 5 million dollars is set aside as the original budget for the construction of a building. A sum of \$100,000 is allocated towards concrete and another \$50,000 is allocated to iron and steel requirements. At some point, the project manager realizes that only \$75,000 is required for concrete, but the steel requires an extra \$25,000. You can create a project budget transfer record to transfer the excess amount from the cost code for concrete to the cost code for steel.

#### **Project budget change records**

Change and modify the budget that is defined for a project.

For instance, a project is initially defined with a budget of \$3,000,000 for various activities. Over time due to uncertain elements, the cost of budget shoots up and you must request for an increase in the project amount allocated. You can create a Project budget change record to specify the revised amount required.

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## **Schedule and task management**

One of the most important aspects of the progress of any project is that adherence to the planned schedule. To plan a schedule, you can break the project into smaller tasks. You can adjust the project schedule to assign tasks to roles so that responsible persons know their task description and requirements.

The schedule management process is often created during the capital project creation process. You can view the Schedule page in the project level to view information that regards the schedule such as tasks that are due.



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## Project design process

After the budget, schedules, and tasks are planned, you can begin the design process.

You can create and reuse specifications for items such as wall types or lighting fixtures. You can publish and share item specifications with internal employees and departments, and with outside vendors, clients, or contractors to ensure that the same data is used throughout the project.

To create, view, or access any aspect of the design management process select a project in the project level, and select the Design page.

The following steps are included in the design process:

1. An architect creates a design drawing or a visual layout of the project, such as an architectural plan. The design drawing record contains only the drawings.
2. The architect or another person who is involved in the design management process creates a design specification record. This record outlines various details about a project. These details typically are not found in the drawing. Together, the drawing and specifications give insight into the details, layout, and requirements of a project.
3. A design document is created. This document is created with the information from the design drawing record and the design specification record. You can apply any record or change the design document at any time.
4. If multiple documents or drawings are used for a design, you can create a design package. If required, you can send the design package record simultaneously to various individuals.
5. After the design package is created, it is sent to a review group. You can send the package in the form of a design review record. Each person in the review group reviews the record, approves, or rejects it, and sends it back to the originator.
6. If a change in the design is required, a design change notice record defines changes to a design document or drawing. The review group reviews the change and either approves or rejects it.
7. If you propose a design change to reduce costs, you can create a value engineering proposal record. The review group reviews and either approves or rejects the changes.

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## Submittal records

You use the submittal process so that qualified professionals certify the quality of items that are used in a project. For example, if a construction project requires the use of tiles for the floors, the quality and type of tile must be approved by the architect.

To get approval, you create a submittal record. You can create, view, or manage submittal records by accessing the submittal links in the Design page. These records require the approval of persons on a distribution list before you can acknowledge the receipt of the record and complete the actions that are specified. You can create a distribution list in the Approval section of the record.

You create a distribution list by selecting the qualified professionals who must approve the project. If the first person approves the submittal record, the record is

sent to the next person on the distribution list until all individuals either approve or reject the record. If any individual on the distribution list rejects the record, it is returned to the originator as rejected.

When the last person on the list approves the record, it is sent to the originator as approved. You can add the approved items to the project.

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## Risk management

Any factor or threat that might adversely affect the successful completion of the project is a risk. With risk management, you can monitor all the risks that are associated with a project.

To manage risks that are associated with a project, you can go to the progress page of a project and select **Risk**. You can create a risk item record from this page. A risk item record is a single item that defines a project liability. In a risk item record, you can specify the risk item, the resolution of the risk, and also the approver that the record is sent to.

If there are multiple risk item records, you can group them together in a risk item review record. By efficiently managing risks, you can increase the chance of project success and identify, address, and eliminate risks before they become threats to the growth of the project.

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## Permit management

Permits are required from jurisdictions for certain activities, such as construction or demolition.

You begin the permit management process when you create a permit application record. This record provides details about the site plan and shows compliance with the zoning by-laws and all setbacks for the project. When the permit application is approved, you can create a permit record.

In a permit record, you provide details about the approval that is provided by the authorities for projects or tasks such as installing an elevator.

You can create, manage, and track many different kinds of permit records in the Design page in the Related Links – capital Project Design section.

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## Chapter 7. Managing project procurement

Procurement Management is a process to obtain materials and services that are required to execute a project. This process includes management of the bid process for a contract, managing the bid process for a purchase order, processing invoices, and releasing payments.

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### Procurement management process

You create, log, and track contracts, purchase orders, and other commitments in the procurement management process. You can log and track payments, change orders, ship notifications, invoices, and receipts.

The following steps show a typical procurement process:

1. A requirement is identified and a request is submitted to the purchasing department. The assigned purchasing officer or other authorized business representative selects the best procurement method.
2. The inventory manager organizes and categorizes the required products and services that the organization wants to procure.
3. If blanket purchase orders or service agreements exist with the vendor, and products or services were negotiated, then the purchasing agent can issue a purchase order for the existing contract. If no contracts exist for the requested material or service, then a request for quotation is sent to the manufacturers or vendors. The purchasing department or the requester can initiate a bidding process.
4. The vendors or manufacturers respond to the bid or request for quotation.
5. The purchasing officer analyzes the vendor response and awards the contract or purchase order. Contracts and purchase orders can be generated from the original bid, which eliminates redundant data entry and ensures accuracy.
6. The purchasing officer purchases the products or services. The purchase can be completed by associating the product records with a purchase order.
7. The purchasing officer pays the vendor for the products or services by using invoices and payment releases.

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### Bidding for vendors

Bidding is a procurement method by which you can select the vendor for purchasing the required goods or completing subcontracted work within the estimated budget and time.

#### The bidding process

The bidding process is used to select a vendor for subcontracting a project or for purchasing products and services that are required for a project. Bid records contain the specifications of the project or details of the products and services that are purchased.

A typical bidding process consists of the following stages:

1. The project manager, contract, or purchasing manager creates a bid that describes the specifications and estimated cost of the project.
2. The manager issues the bid.

3. The reviewers approve the bid.
4. The manager sends the bid to a group of vendors for responses.
5. The vendors analyze the bid and calculate the cost of completing the project. Each vendor responds to the bid with details about the products and services that are needed and the overall cost.
6. The manager analyzes the bid responses.
7. The manager awards the bid to the vendor that best meets the requirements of the project.
8. A standard contract is automatically created by using the bid details and response information.

During the process, the manager or vendor can request clarification about the bid.

The following diagram describes the bidding process.

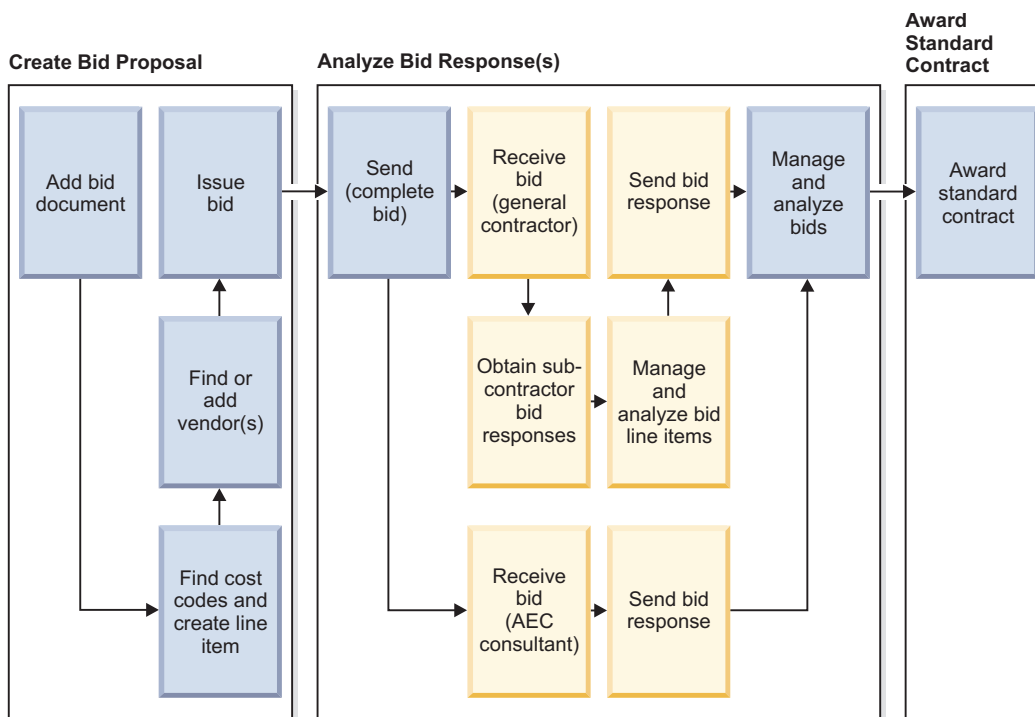


Figure 1. The bidding process

## Creating bids

The bid document describes the specifications and estimated costs of the project. The bid document also contains a list of potential vendors.

### Before you begin

You must sign in as a contract manager, purchasing manager, or project manager.

### Procedure

1. Select **Procurement > Proposals > Bids** and add a bid.
2. On the **General** tab, enter the bid name and other details.
3. On the **Cost Form** tab, add the products or services for the project.

4. On the **Vendors** tab, add the vendor companies participating in the bidding process.
5. Create a draft and issue the bid.

## Results

If the distribution list contains reviewers, the bid is sent to the reviewers and the status of the bid is changed to review in progress. After all reviewers approve the bid, the status of the bid is changed to issued.

## Clarifying bids

If you need clarification during the bidding process, you can create a bid clarification record and send it to the relevant vendor.

### Before you begin

You must sign in as a contract, purchasing, or project manager.

### Procedure

1. Select **Procurement > Proposals > Bid Clarifications** and select **Add**.
2. On the **General** tab, enter the name and other details.
3. In the To section, specify the person to whom you send the clarification.
4. In the Bid section, select **Find** and associate the bid that requires clarification.
5. In the Request section, enter the questions that you have about the bid.
6. Create a draft and submit the clarification.

---

## Contracts with vendors

After an agreement is reached between your organization and the vendor, you record the agreement in a contract. A contract can be awarded as a result of the bidding process or can be created separately.

## Standard contracts in the purchasing process

A contract creates a legal obligation between your organization and the vendor. A contract specifies details of the agreement, such as the scope of the project and the cost of materials.

After the bidding process is complete and the bid is awarded to a vendor, a standard contract is created. A standard contract creates an initial agreement between the vendor and organization. The standard contract is a binding agreement, and therefore changes cannot be made directly to the standard contract record.

For example, the process of hiring a construction company for building a new restaurant for a budget of \$5,000,000 by a hotel owner. With the bidding process, the contractor is identified and the system generates standard contract agreement. The agreement will state that one group is to build the restaurant and the other one must pay \$5,000,000.

## Awarding contracts from bids

After the vendors respond to your bid, you can analyze their responses and decide who to award the contract to.

## Before you begin

You must sign in as a contract, purchasing, or project manager. The bid must have a status of completed, and the bid responses must have a status of issued.

### Procedure

1. Select **Procurement > Proposals > Bids** and open the bid.
2. On the **Analysis** tab, in the bid responses section, select the response that you want to award the bid to.
3. Award the bid.

## Recording contract changes

A standard contract is a binding agreement. Changes cannot be made directly to the contract. You can use a contract change order to record all changes that are made during the execution of the contract. For example, the terms and conditions might change.

## Before you begin

You must sign in as a contract, purchasing, or project manager.

### Procedure

1. Select **Contracts > Standard Contract Change Orders > Contracts**.
2. Add a change order and specify the details about the contract changes.
3. Create a draft and issue the changes.

---

## Requests for quotes

The request for quote (RFQ) record is used to select a vendor for purchasing products or services for a project. When the RFQ record is issued, vendor responses are logged in the RFQ record.

The RFQ is used for small or one-time requirements that do not require a contract. The project manager creates an RFQ record as the first step in the purchase cycle. The RFQ record contains the data that the vendors require to decide a response, including the required materials and the estimated budget.

After all responses are received and analyzed, the RFQ is awarded to the successful vendor and a purchase order is automatically created. When the RFQ is awarded to a vendor, a purchase order is created. This purchase activity is considered a onetime commitment for the project.

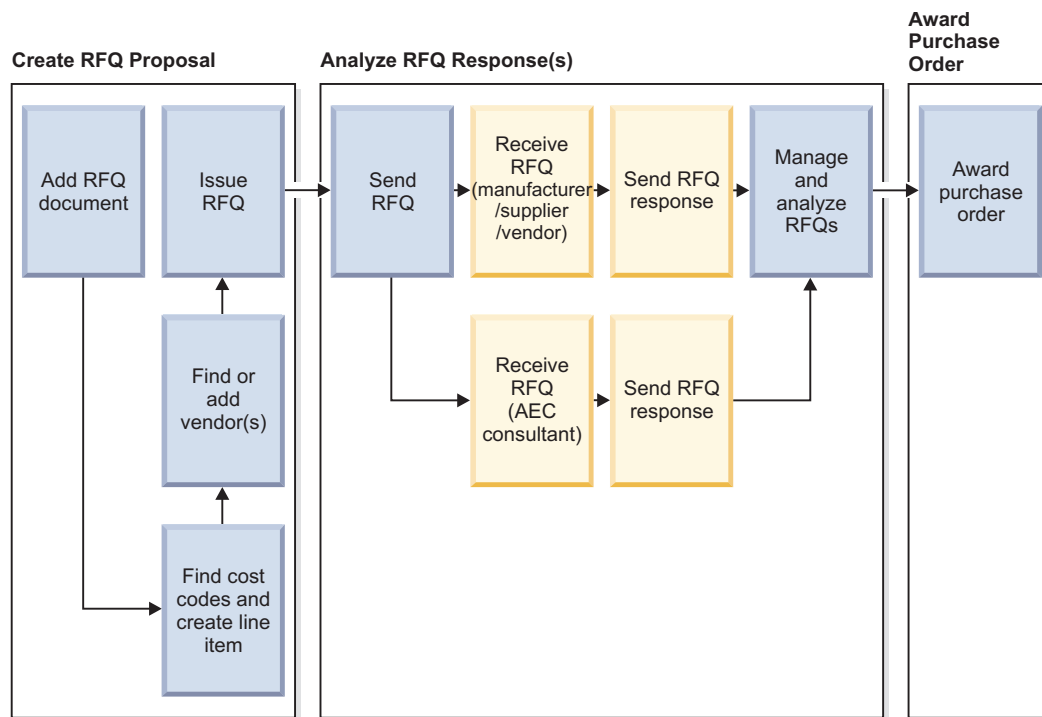


Figure 2. Request for quote process

## Creating requests for quotes

The request for quote (RFQ) record contains details about the products and services that you want to purchase, cost details, and vendor companies. You create an RFQ record for small projects or one-time projects that don't require a contract.

### Before you begin

You must sign in as a contract, purchasing, or project manager.

### Procedure

1. Select **Procurement > Proposals > Requests For Quotes** and add an RFQ record.
2. On the **General** tab, enter the name of the project and specify the contact person.
3. On the **Cost Form** tab, add the products or services for the project.
4. On the **Vendors** tab, add the vendor companies to which you want to send the RFQ record.
5. Create a draft and issue the RFQ record.

## Purchase orders

A purchase order is used to purchase products from a selected vendor. It provides details about the products and services, the vendor from whom the purchase is made, and the terms and conditions of the purchase.

Each item that is to be purchased is a line item on the purchase order. Multiple line items can be associated with a purchase order record.

Purchase orders can be created in the following ways:

- Automatically, when a request for quote (RFQ) or a request for proposal (RFP) is awarded. The purchase order record has the same name as the respective RFQ or RFP record.
- Automatically, when an inventory item is reordered.
- From a blanket purchase order, on the **Products and Services** tab.
- From the **Procurement > Requisitions & Purchase Orders** menu.

Alternatively, you can manually create a purchase order record so that you can order directly from the selected vendor. To create a purchase order select **Procurement > Requisitions & Purchase Orders > Purchase Orders**.

## Awarding purchase orders

After the vendors respond to your request for quote (RFQ), you can analyze their responses and award a purchase order.

### Before you begin

You must sign in as a contract manager, purchasing manager, or project manager. The request must have a status of completed, and the request response must have a status of issued.

### Procedure

1. Select **Procurement > Proposals > Requests for Quotes** and open the request.
2. On the **Analysis** tab, in the RFQ Responses section, open the response that you want to award the purchase order to.
3. Award the purchase order.

## Purchase order invoices

An invoice asks that payment is made for services that are rendered or for products that are shipped.

When no contract exists between the vendor and organization, a purchase order (PO) invoice captures details about the products or services that are provided. An invoice is generated to charge for the products or services. The PO invoice is associated with the corresponding purchase order.

The PO invoice is associated with a budget. When a payment is made, the amount that is specified in either the PO or the PO invoice is committed to the budget.

To create a purchase order invoice go to **Contracts > Payables > Invoices > PO Invoices**.

---

## Releasing payments

When a payment is released for a contract or a purchase order, a payment release record is created. Payments are made either for the completion of the entire contract or for providing the required products and services.

### Procedure

1. Select **Contracts > Payables > Payments > Releases** and select **Add**.
2. On the General tab, enter the name and other details.



3. On the Invoices tab, associate the invoices for which payments are released.
4. Save and issue the payment release.



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## Chapter 8. Project execution

During project execution, you track information, manage daily reports, and manage and create records to ensure the project is run properly. Project execution tasks and processes are daily and ongoing.

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### Requests for information

While a project is in progress, subcontractors and project managers communicate with requests for information.

You can create, manage, and track request for information records on the Design page.

If you award a contract to a subcontractor for a certain part of the project, you send out the required design specifications, drawings, or any other required documents. If the subcontractor has questions about the design or anything else regarding the contract, a request for information record is sent to clarify issues or misconceptions about a project. Clarifications that are needed are added in this record, and then the record is sent back to subcontractor.

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### Issues and changes

An issue is a problem in any level of the project that requires a resolution. Issues can affect costs, schedules, drawings, documents, or other factors. Issues are identified in the issue record and can be further described in a potential change record.

You can create, manage, or view issue records and potential change records on the Progress page.

An issue record has multiple issue items that are associated with it. An issue item contains the communication between the issue manager and other persons who are involved in solving the issue item. For example, the issue manager gives a direction to the concrete subcontractor to replace a piece of sidewalk to make it 1 inch thicker. The subcontractor responds by telling the issue manager when the work takes place or is finished.

Occasionally, changes to the project scope, budget, or schedule might occur from an issue or from suggested resolutions to that issue. Potential changes do not refer to changes that occur. They are conceivable changes that might result in a standard contract change order, which is used to make the changes to a project. Approved potential change order records can turn into change orders, which typically result in changes to project scope.

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### Daily journals

You use daily journal records to track day-to-day events that happen at a project site. The information includes the visitors to the project site, weather forecast for each day, and cost code and financial details for each activity that is scheduled for the day.

You can create, manage, or view all daily journal records on the Progress page.

A daily journal can consist of the following types or records:

**Daily detail records**

Contain information about the weather and visitors for a single day at a project site. Weather information includes the direction of the wind, precipitation, percentage of humidity in the air, visibility, and other common atmospheric characteristics. Visitors are individuals who come to the project site occasionally.

**Daily events records**

Describe all the activities that occurred on a single day at a work site. Each daily event record describes a single event or a single activity.

**Daily reports records**

Group daily event records together to provide details about all events that occurred on a single day. Additionally, you also can associate a scheduled activity on the Task page with the daily report record.

---

## Project meetings

You can track meetings and meeting topics such as project planning, cost code details, project schedules, and various risks that are involved in a project.

You can create, manage, or view all meeting records in the meetings section on the Progress page.

The following records track project meetings:

**Meeting item records**

Provide details about meetings, including individual elements that are discussed or reviewed in a meeting record. For example, you can create a meeting item record that provides details about the electrical issues that are discussed in the meeting.

**Meeting records**

Consist of all information about a meeting, including the attendees, the meeting time, place, and the meeting items. You can also associate meeting item records with a meeting record. Any unresolved issue for a meeting item can be carried over to another meeting.

**Meeting series records**

Group meeting records that are similar in topic.

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## Project correspondence

In IBM TRIRIGA, you use correspondence records, reports, and notices to create, manage, and track internal and external correspondence.

You can view, manage, and create correspondence records, reports, and notices in the correspondence section of the Progress page.

The following correspondence records, reports, and notices manage all the communication details that regard a project:

**Accident report**

Details the events and reasons that led to an injury or accident. The report also contains details about the measures that were taken to reduce the severity of the accident.

**Safety notices**

Notify all the workers about safety measures to prevent accidents in the work site. These records give details about the procedures to follow to prevent an accident.

You use safety notices to inform individuals who are not in compliance with safety measures for the project. Breaking safety rules increases the chance of injury or death. Safety notices help prevent injury and limit liability.

**Conversation record**

Contains the details of a telephone conversation between two or more people who are involved in a project. You can use this record to describe the conversation and give extra details, such as the date, time, and number of persons who are involved in the conversation.

**Field Instruction**

Grants approval for the project changes without requiring the formal approval. A field instruction limits liability for the individual who performs the changes, and it enables the project to move forward. Typically, field instructions are used if the project is in danger of being stalled unless the work is completed.

**Notice to comply**

A message that is sent when an action is taken that violates state or federal regulations. For example, if an individual digs without site approval, a notice of compliance is sent informing the individual to halt the digging process. Violating the notice to comply can result in further serious actions.

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## Progress reports

You can create project, contract, and closeout reports to provide details about the development of a project. You can view progress reports at any point in a project lifecycle. You can also view reports to see how contracts and project closeout are progressing.

To create, manage, or view a progress report go to the Related Links-Capital Project Progress section on the Progress page.



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## Chapter 9. Project and program closeout

Project closeout is the final step in the project lifecycle. During the closeout process, the project manager ensures that all aspects of the project are complete. If all projects in a program are closed, the program manager closes the program.

The Progress page contains all information that is necessary for project closeout, including reminders, reports, and checklists.

To assist with project closeout, punchlists records ensure that tasks are completed before the project is finished.

Closeout checklists can also be used to remind the project manager of items that need to be completed before the project closes.

If projects are all part of a program, program closeout ensures that all projects are completed and closed. If all projects are closed, and leftover funds are available for the project, you might need to transfer funds to another program.

To transfer funding, go to the program funding section of a program record.





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