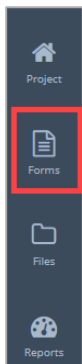


GMP Intra-Project Transfers

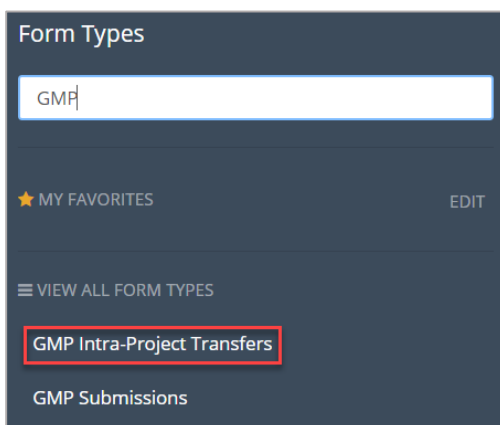
The GMP Intra-Project Transfers is a request sent by the vendor to the DGS PM to request authorization to transfer funds between approved cost lines for GMP projects.

Creating the GMP Intra-Project Transfers

1. Within the project, click the **Forms** icon on the left navigation pane.




2. In the search area of the **Form Types** start to enter **GMP** and select **GMP Intra-Project Transfers**.



3. Click the **Create New Field Report** button located in the middle of the log or click the **New** button in the upper right corner.

GMP Intra-Project Transfers shared with me

New Print ...



You have no GMP Intra-Project Transfers yet
Once you have access to GMP Intra-Project Transfers, they will show here.

Create New GMP Intra-Project Transfer

4. Enter the title of the GMP Intra-Project Transfer in the **Subject** field.

DETAILS

Subject * Required

Type the Subject

5. Enter a **Transfer Amount**.

Transfer Amount

\$0.00

6. Click inside the **Transfer From Division** and select a division from the list. The selected division should match the division from the GMP Submission.

Transfer From Division

7. Click inside the **Transfer To Division** and select a division from the list. The selected division should match the division from the GMP Submission.

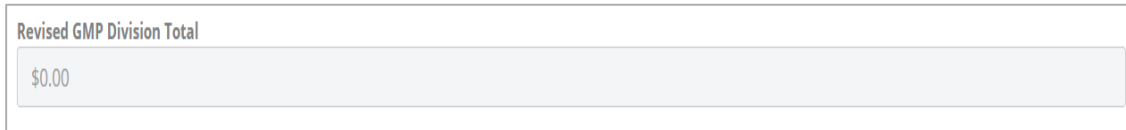
Transfer To Division

8. Enter the **Current GMP Division Total**. This is the current total for this line within the GMP breakdown.

Current GMP Division Total

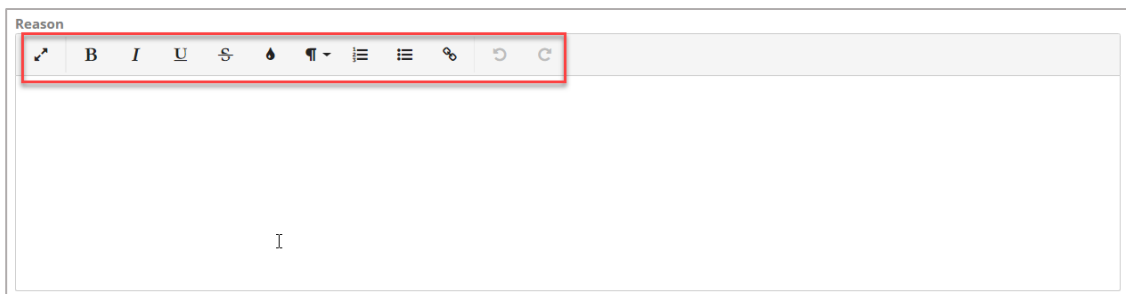
\$0.00

9. Enter **Revised GMP Division Total**. This will be the new total within the GMP line if the request is approved.



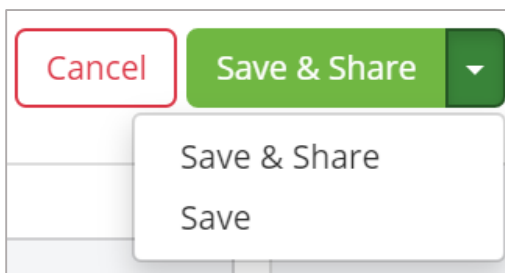
A screenshot of a form field labeled "Revised GMP Division Total". The field contains the text "\$0.00".

10. Enter a **Reason** for the transfer. Note that this data field has enhanced formatting to assist in the proper presentation of the transfer.



A screenshot of a form field labeled "Reason". The field has a rich text editor toolbar at the top with icons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, and undo. The field contains a cursor "I".

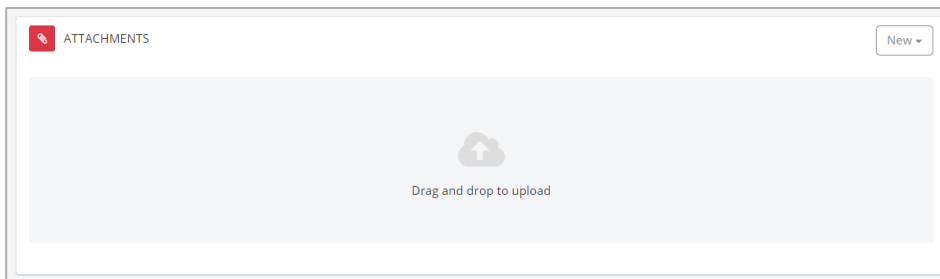
11. Once the GMP Intra-Project Transfer is complete, click the **Save and Share** button and select either **Save** to save the document as a draft or **Save & Share** to save the document with the appropriate share groups.



A screenshot of a button labeled "Save & Share" with a dropdown arrow. The dropdown menu is open, showing two options: "Save & Share" and "Save".

Attach Supporting Documentation

1. Drag and drop any supporting files to the **Attachments** section of the record.



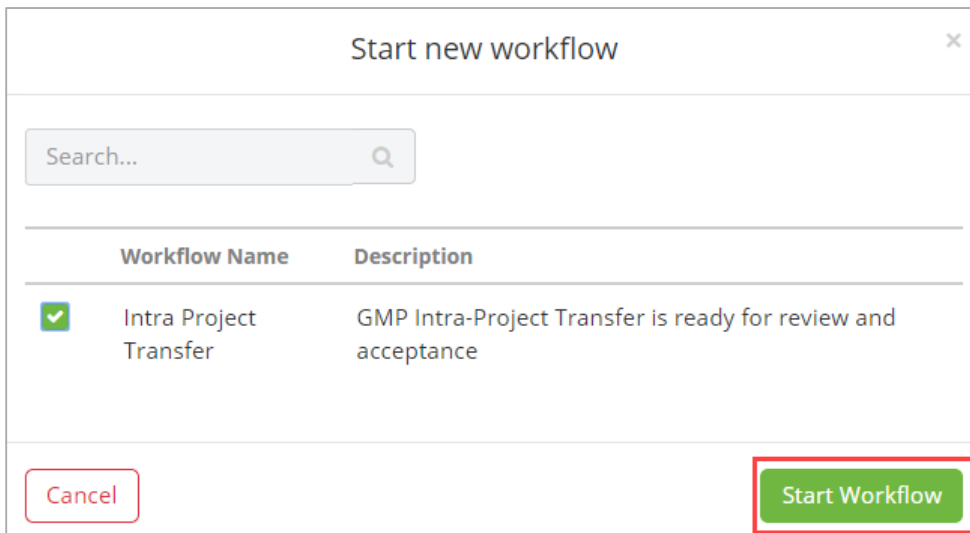
A screenshot of the "Attachments" section. It features a red icon with a plus sign and the word "ATTACHMENTS". Below this is a large light gray area with a cloud icon and the text "Drag and drop to upload". A "New" button is in the top right corner.

Workflow to DGS PM for Approval

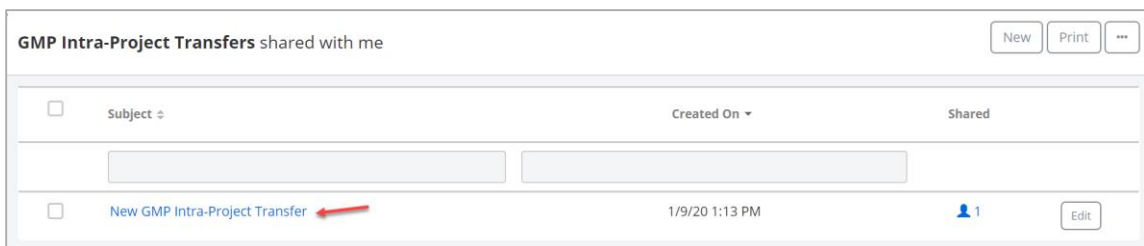
1. Scroll to the Workflow section and click the **Start New** button.



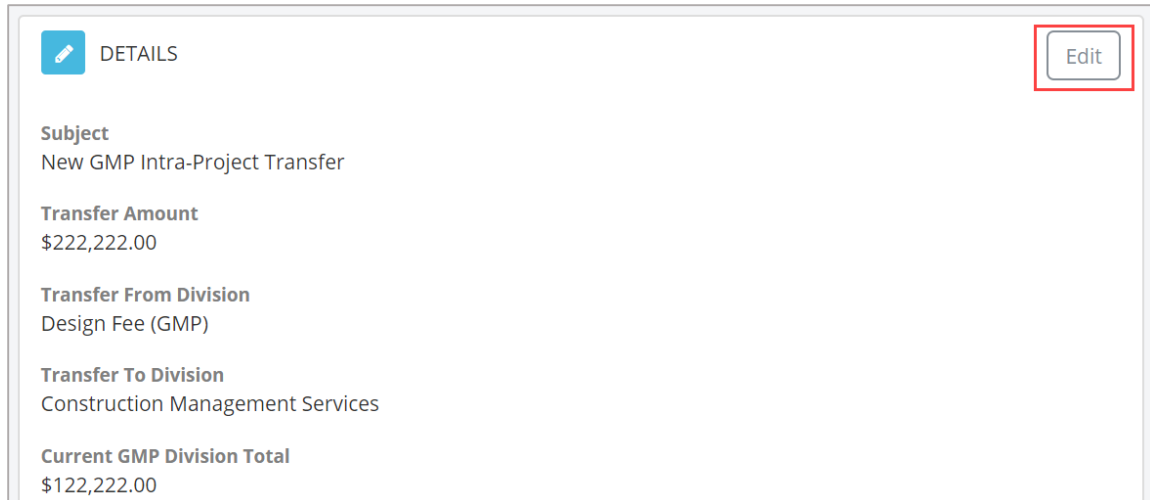
2. Click the **checkbox** beside the **Intra Project Transfer workflow** and click the **Start Workflow** button.

**Review the GMP Intra-Project Transfers**

1. Open the GMP Intra-Project Transfers register and **click the title of the record** you would like to edit.



2. Review the request to make sure there are not any conflicts or problems. .



DETAILS

Subject
New GMP Intra-Project Transfer

Transfer Amount
\$222,222.00

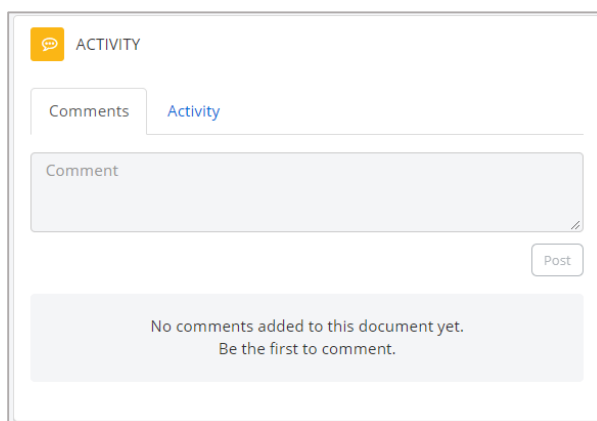
Transfer From Division
Design Fee (GMP)

Transfer To Division
Construction Management Services

Current GMP Division Total
\$122,222.00

Edit

3. To ask questions or add commentary regarding the Field Report record, use the **Comments** section.



ACTIVITY

Comments **Activity**

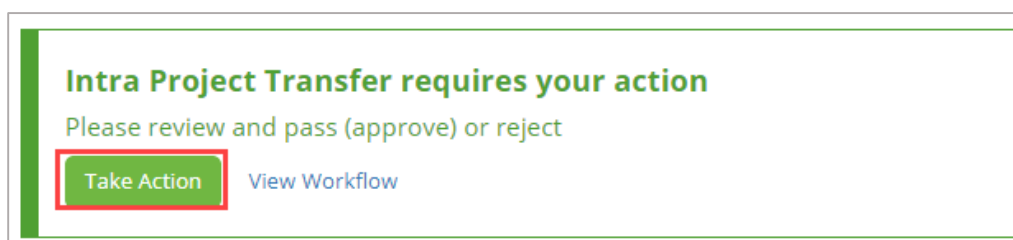
Comment

Post

No comments added to this document yet.
Be the first to comment.

Take Action on the Request

4. Click the **Take Action** button in the Workflow box on the top of the form.



Intra Project Transfer requires your action

Please review and pass (approve) or reject

Take Action [View Workflow](#)

5. Click **Pass** to Approve or click **Cancel** to Reject. Enter notes for either selection and click the Take Action button to complete the workflow.

Intra Project Transfer

Your action

☒ **Pass**
Mark as "Passed" and move forward to the next step

☐ **Cancel**
Mark as "Cancelled" and stop the workflow

Notes

Notes

Cancel

Take Action