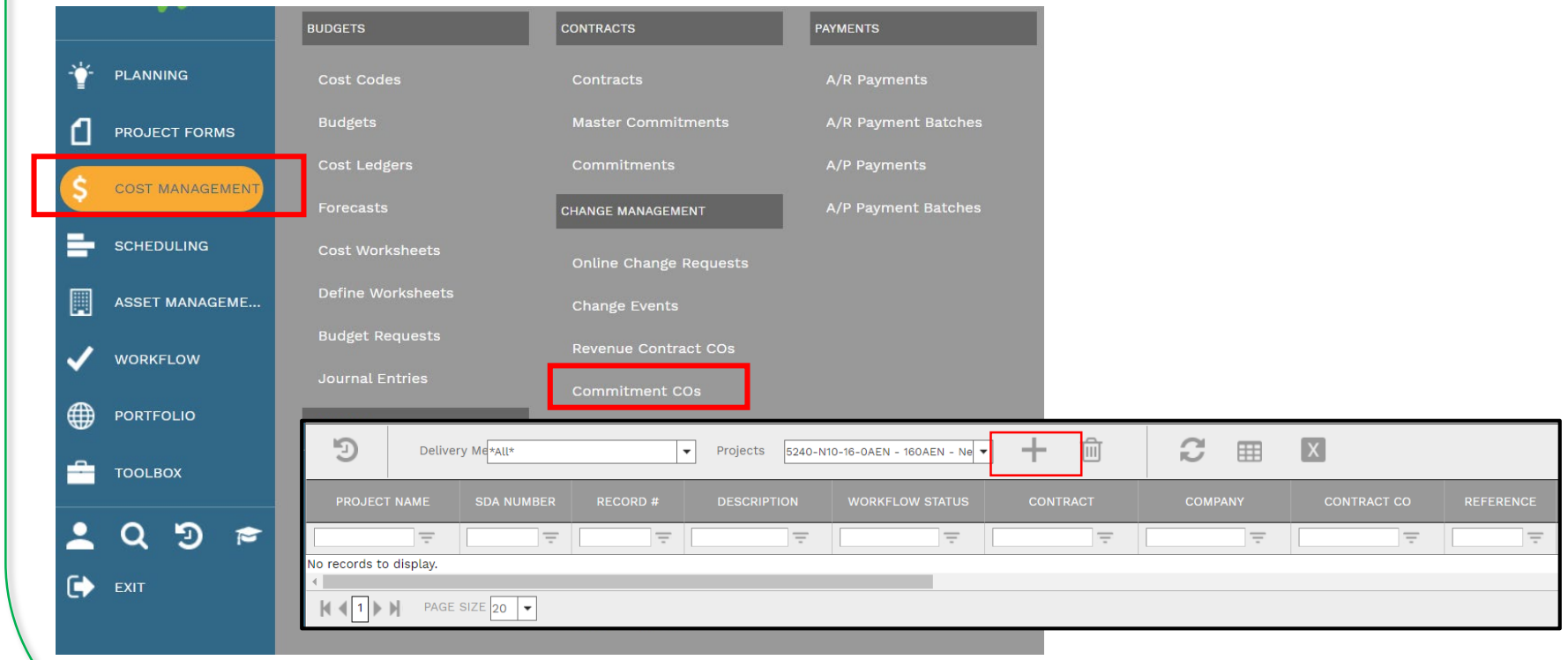
OPEN THE MODULE

- Choose **Cost Management -> Commitment COs**
- This displays the **Manager View** for the module and shows all records in the module.
- To search for a document to modify, use the columns to filter for the data you need. For example, use the Record # column to search for a document, then double-click to open the document.
- Use the X to export this view to Excel for an ad hoc report.
- To create a new document, click **Add**. +



PMWeb®

Task Orders

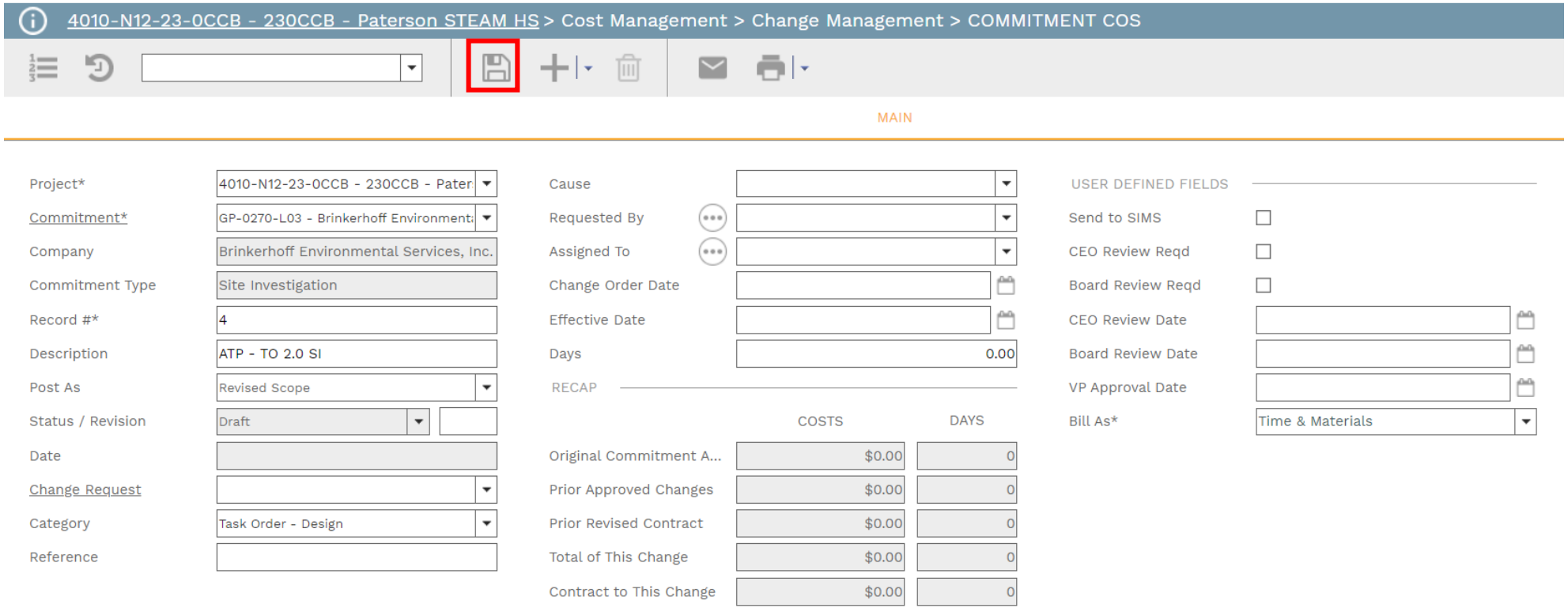
Commitment COs

REV: 8/2024

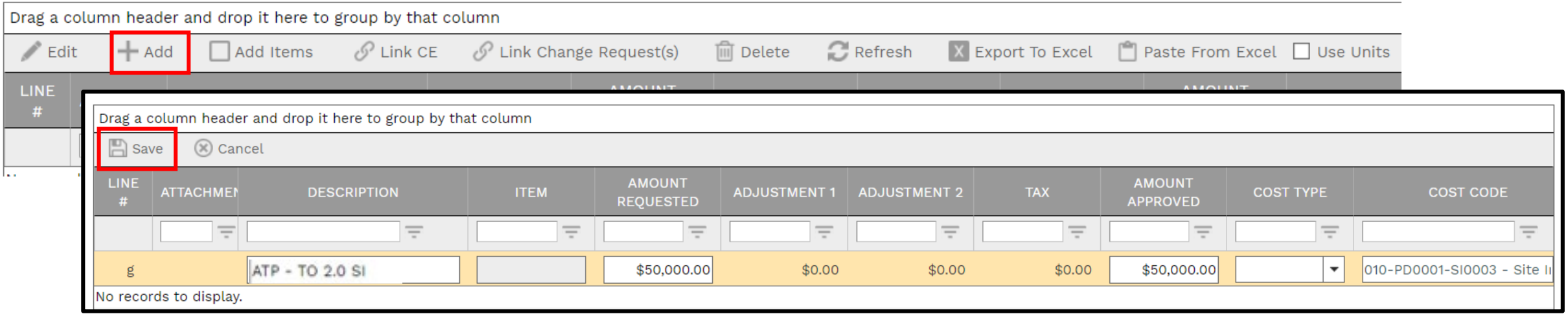
ADD THE TASK ORDER INFORMATION

- Enter the Project, Commitment (Contract), Description (as shown), Category, Cause (Not Assigned), Requested By, Assigned To, Change Order Date, Bill As (Time & Materials). Reminder: any field with an asterisk is a required field.
- Click the **Save** button when finished.

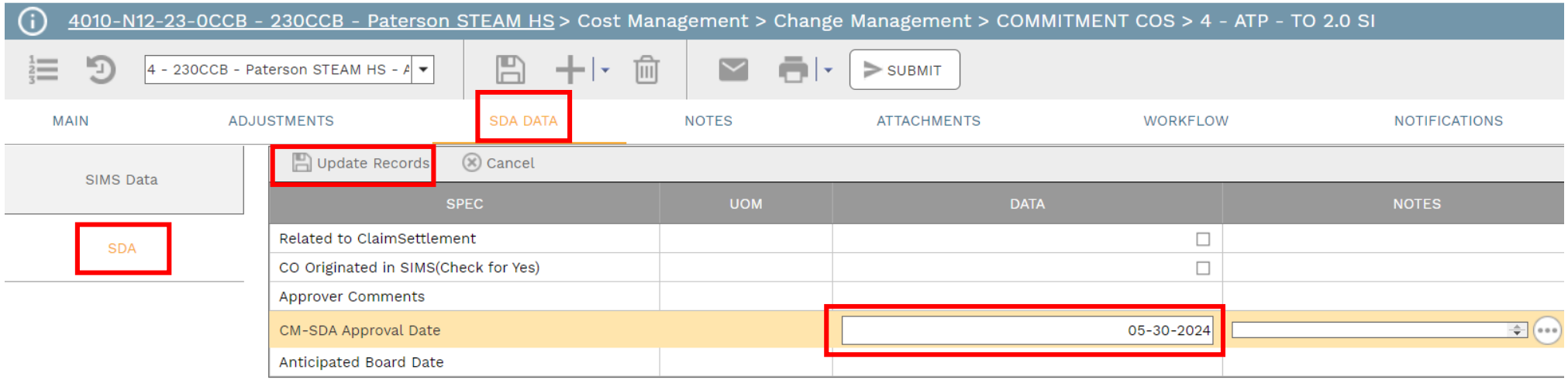
- **Note:** you must copy the text in the Description field to the description in the line item below, they must be the same.
- **Note:** The Category Field choices available are **Task Order (**for invoices previously entered in RESDB**)** and **Task Order – Design**. The workflow for each of these categories will route to different people, so ensure you have chosen the correct one for your Task Order entry.



- Click **Add** to enter the line item information at the bottom of the screen.
- Enter the information on the peach-colored line that displays. Enter the Description, Amount Requested, Cost Code (as shown).
- Click the **Save** button when done.
- **Note:** you must copy the Description from the Description in the header section, they must be the same.

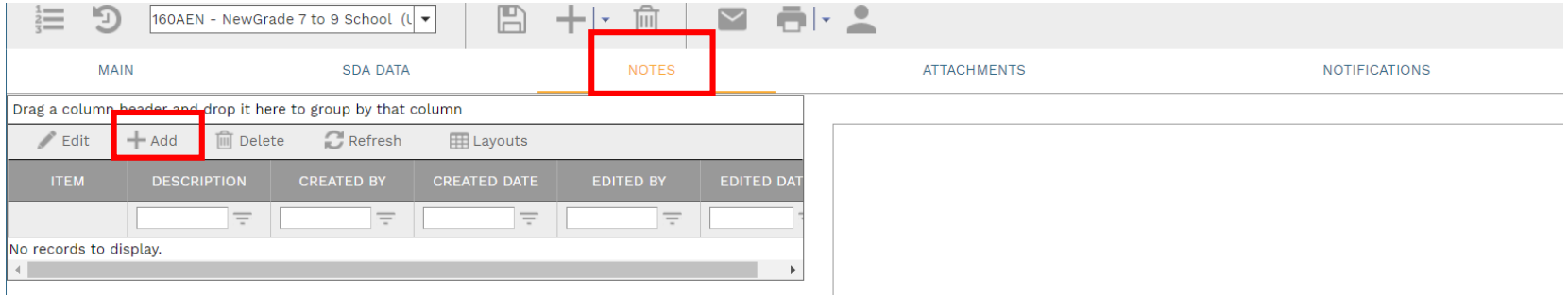


- On the **SDA Data** tab, click the **SDA** subtab, then enter **CM-SDA Approval Date**.
- Click **Update Records** when done.



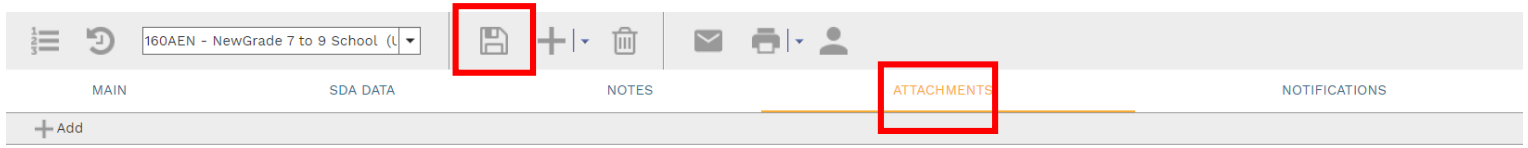
ADD ADDITIONAL NOTES

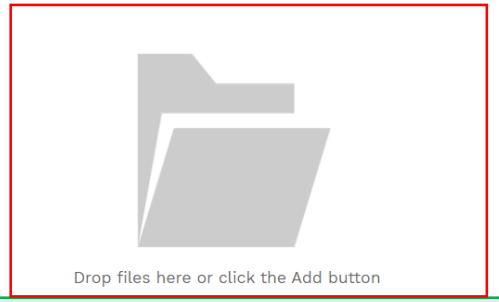
- Click **Add** on the **Notes** tab to add additional notes as needed. Click the **Save** button after each entry.



ADD ATTACHMENTS

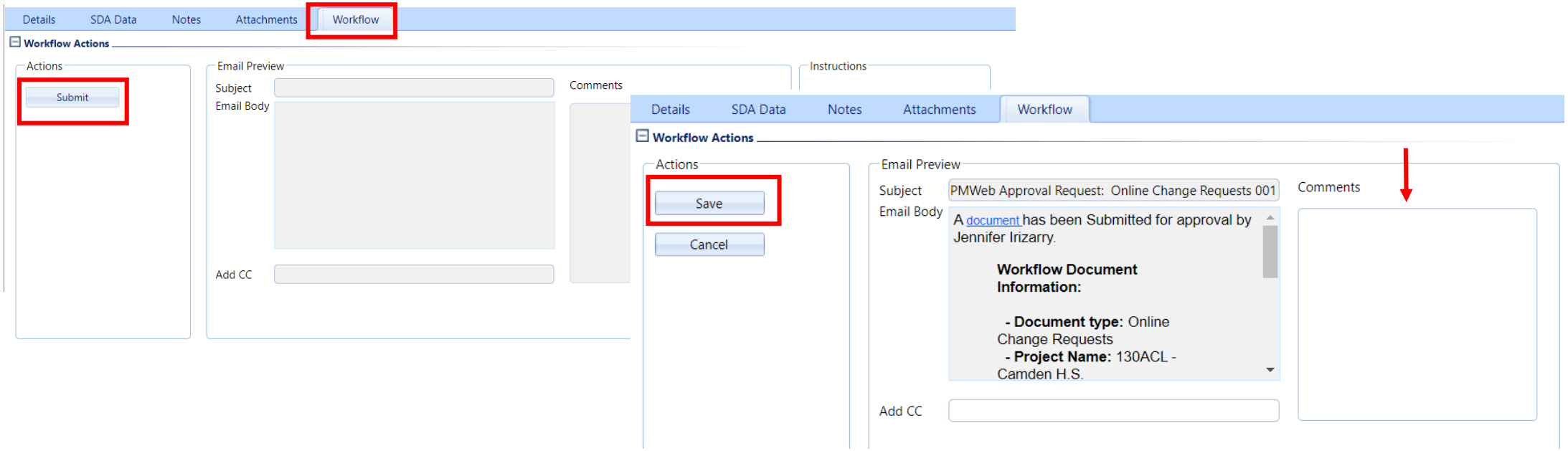
- Drag-and-drop your desired attachment(s) in the middle section of the screen. You can add any type of document. Repeat the process for all additional attachments. Click the **Save** button when finished.





INITIATING THE WORKFLOW

- Click the **Workflow** tab and click the **Submit** button. This document will be reviewed for correctness by the parties identified in the workflow process. Those parties involved in the workflow review are established on a project-by-project basis. Add **Comments** as needed and click the **Save** button. Individuals who are part of the workflow approval will receive a notification to log in the system and review the workflow for approval. After document receives final approval, it will be submitted for processing by the SDA's Central Processing Unit team.



REPORTING

- To run prepared reports, click the **printer icon** in the header section and select **BI Reporting**. Any report with “SDA” in front of the report name is a report we have customized based on staff needs. Select your desired report, then Print to PDF, export to Excel, or click the eye to view the report.