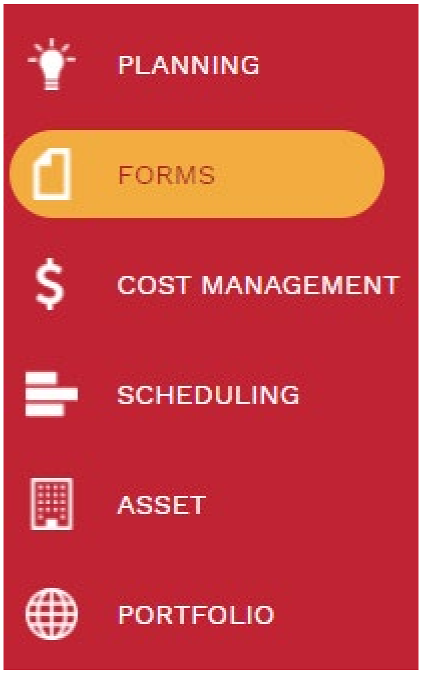
UNIVERSITY of HOUSTON

FACILITIES SERVICES

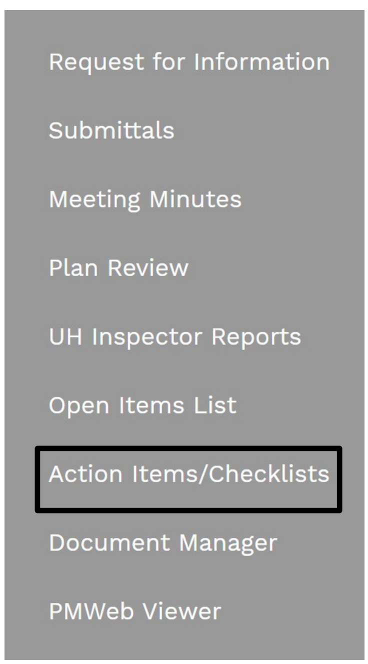
PMWeb Quick Reference

Red Zone Process

1- Click on **FORMS** from the button on the left menu.



2- Under the FORMS tab, click on the **Action Items/Checklist** record.



3- Click on **+ Add.**

4- **Project*** field - Select the project from the dropdown menu. You can start typing name/project number to narrow search.

5- **Action Item/Checklist #** field – auto populates with next sequential number

6- **Description** field - Enter ‘RED ZONE CHECKLIST’

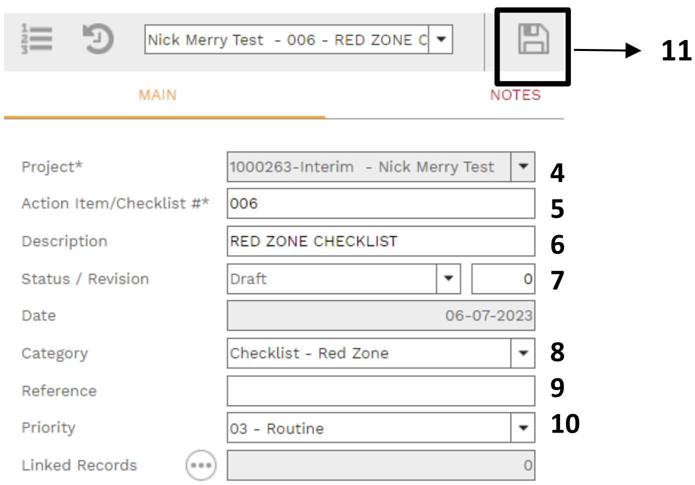
7- **Status** field - Leave in draft.

8- **Category** field - Select ‘**Red Zone**’ from the dropdown menu.

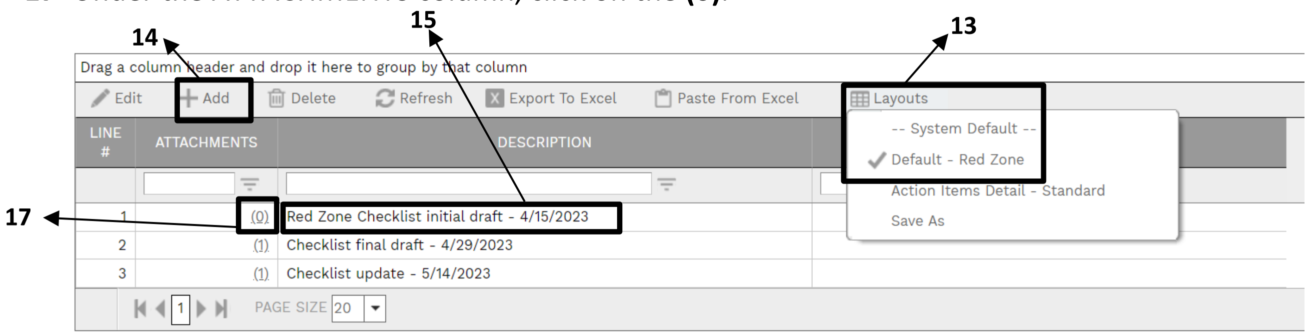
9- **Reference** field – Optional field.

10- **Priority** field – Leave as ‘Routine’.

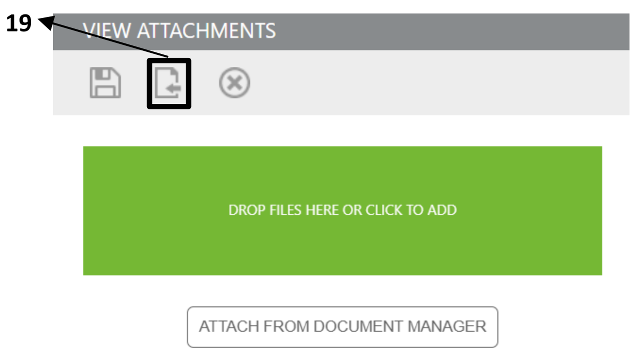
11- From the top bar, click on the icon to save the header.



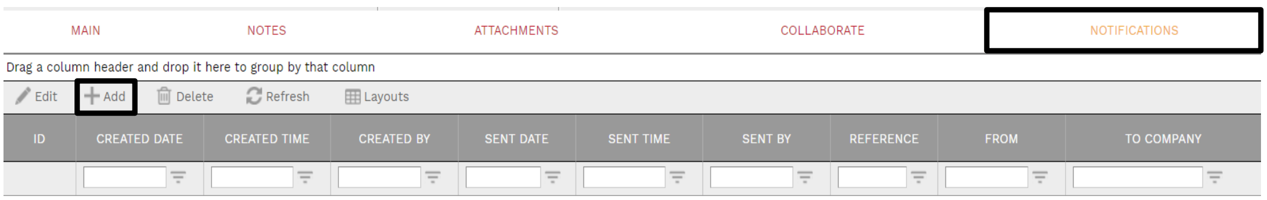
12- The details section will be used to post the initial and updated Red Zone checklists.
13- Under **Layouts**, select the 'Default – Red Zone' layout.
14- Select **+Add** to add a row.
15- Enter an appropriate description and a date i.e. 'Red Zone Checklist initial draft - 4/15/2023'.
16- Click on the Save button.
17- Under the ATTACHMENTS column, click on the **(0)**.



18- In the VIEW ATTACHMENTS pop up menu, drag the Checklist to the green DROP FILES HERE box.
19- Click on the Save & Exit button.



20- To distribute the Red Zone Checklist, under **"NOTIFICATIONS"** tab, click **+Add**.



21- To establish a distribution list, in the pop up box, click on the icons to select **To** and **CC** addressees.

22- Manual CC field – utilize to add e-mail addresses for non-PM Web users.

23- Subject field – Add a relevant subject line for the e-mail.

24- Status field – Leave blank.

25- Notification type field – Leave blank.

26- Reference field – Optional field.

27- Due Date – Optional field. Enter desired date and time.

28- Reminder – Optional. Click or unclick to activate.

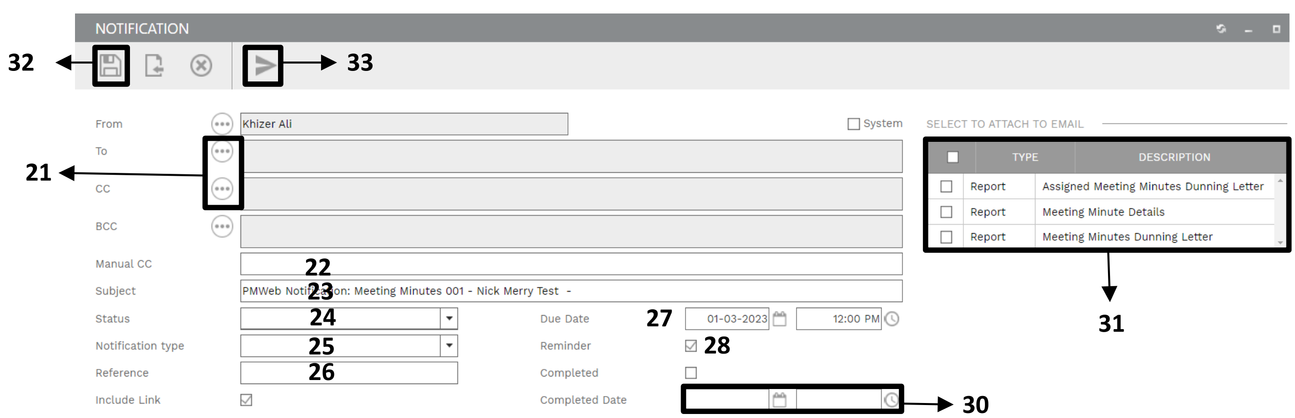
29- Completed – Leave unchecked.

30- Completed Date – Leave blank.

31- Within the **"SELECT TO ATTACH TO EMAIL"** box, click on the Red Zone checklist to include in the email notification.

32- Click on the "**Save"** icon.

33- Click on the **"Send"** icon.



34- For future distribution, the NOTIFICATION can be edited and resent. A new Notifications is not required.

35- Process Complete