Rev October 2024

PMWeb

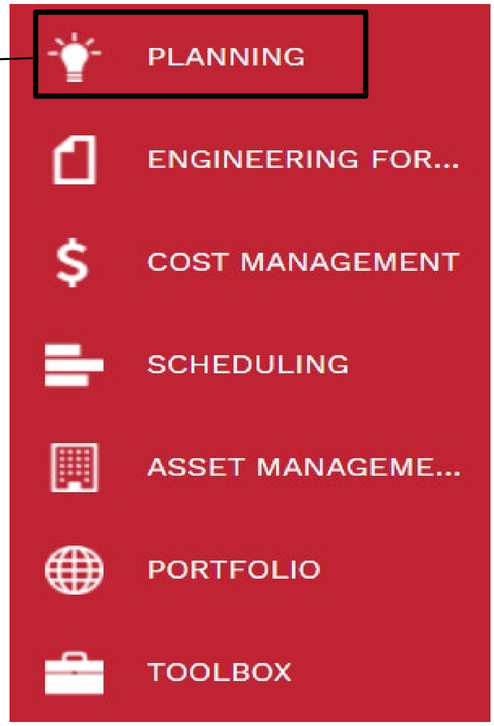
Planning Initiative Steps

Overview: This guide explains how a project initiative is entered into PM Web for project execution once a project is transitioned to a Project Manager. This process is a step-by-step guide to be followed by the assigned Project Planner.

Reference: N/A

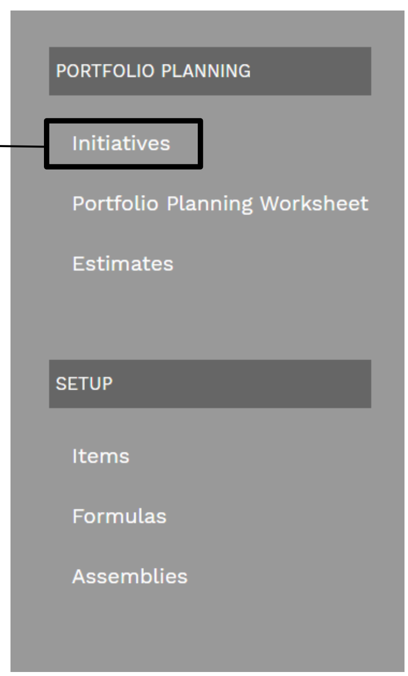
1- Click on the **Planning** on the left panel.

1

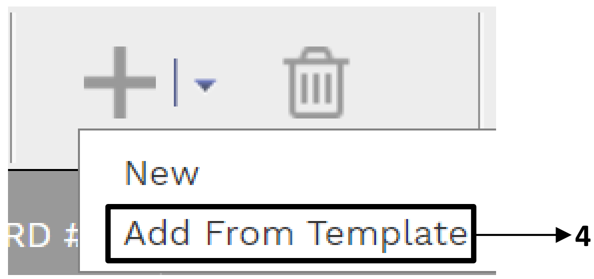


2- Click on **Initiatives.**

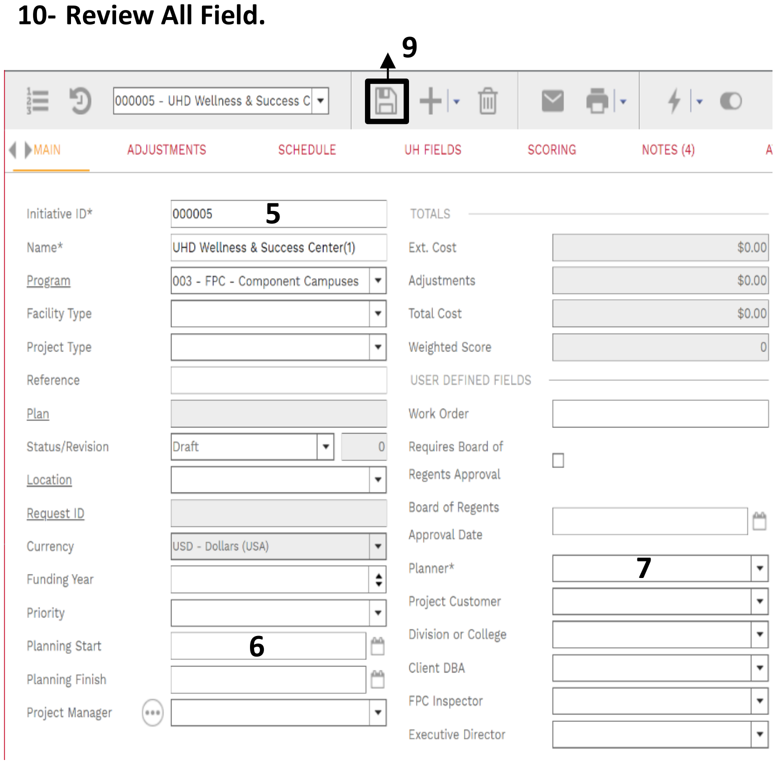
2



3- Click on the drop-down arrow next to the **ADD** button.
4- Select **Add from Template** and select **TEMP_PROJ_01**.

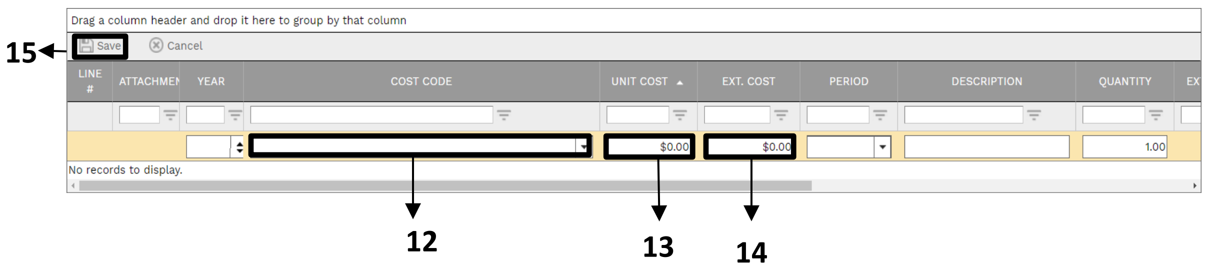


5- Initiative ID field – Auto populates.
6- Planning Start field – Insert the start date.
7- Planner field – Type the planner's name.
8- Populate remaining fields in the header.
9- Click on the **Save Button**.
10- Review All Field.

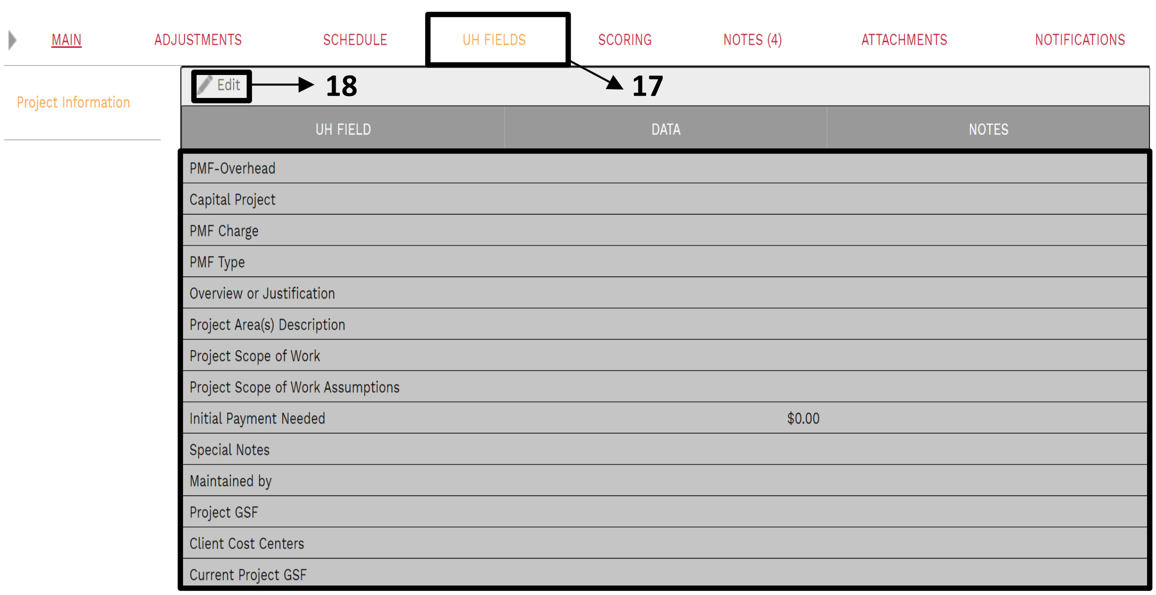


11- In the lower bar click on **+Add.**

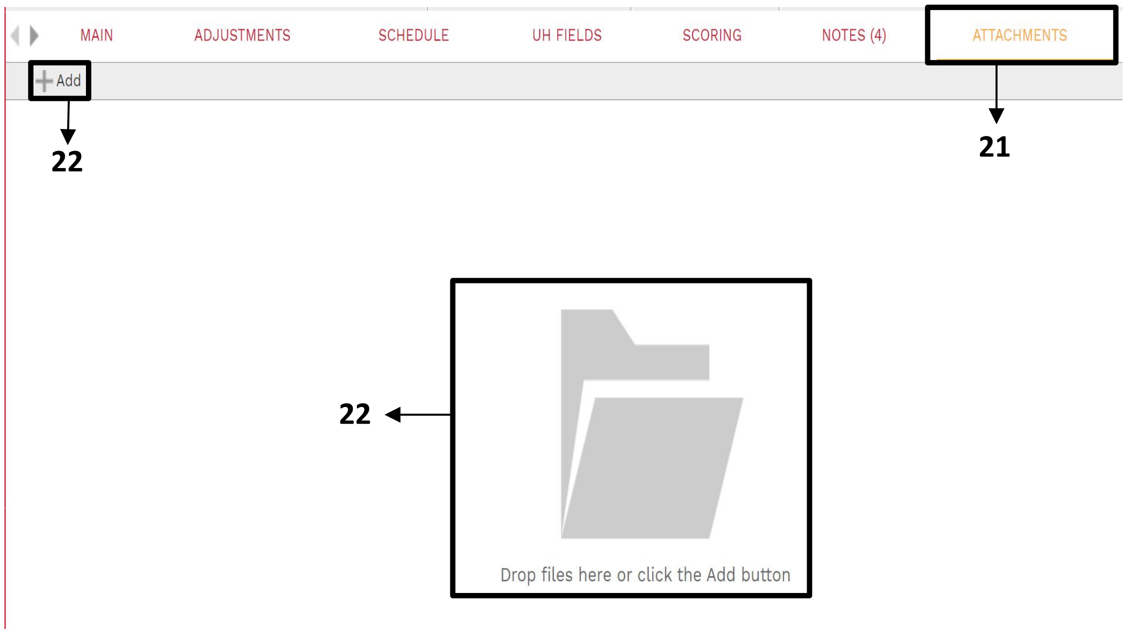
12- Cost Code field – Select a cost code.
13- Unit Cost – Type in the Unit Cost.
14- EXT. Cost field – Auto populates, add period, description as needed.
15- Click on the **Save icon.**



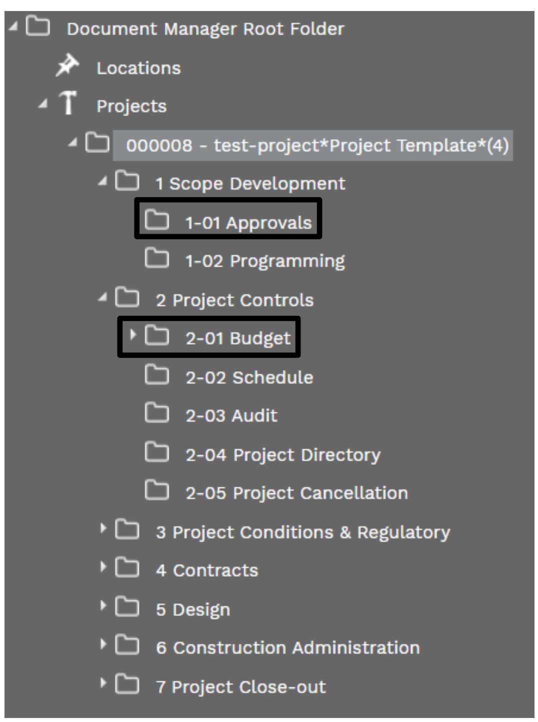
16- Note: If your customer is not listed email Dang, Lawrence.
17- Click on the **UH Fields** tab on the top navigation bar.
18- Highlight all the fields holding shift and click on **the Edit button**.
19- Add project information accordingly.
20- Note: The information in these fields will be used for PFA Generation.



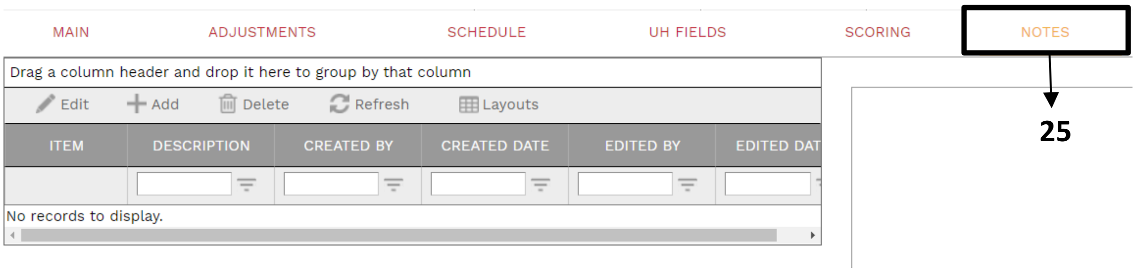
21- Click on the **Attachments tab** at the top navigation bar.
22- Drag and drop the file you want to upload or click the **+Add button**.



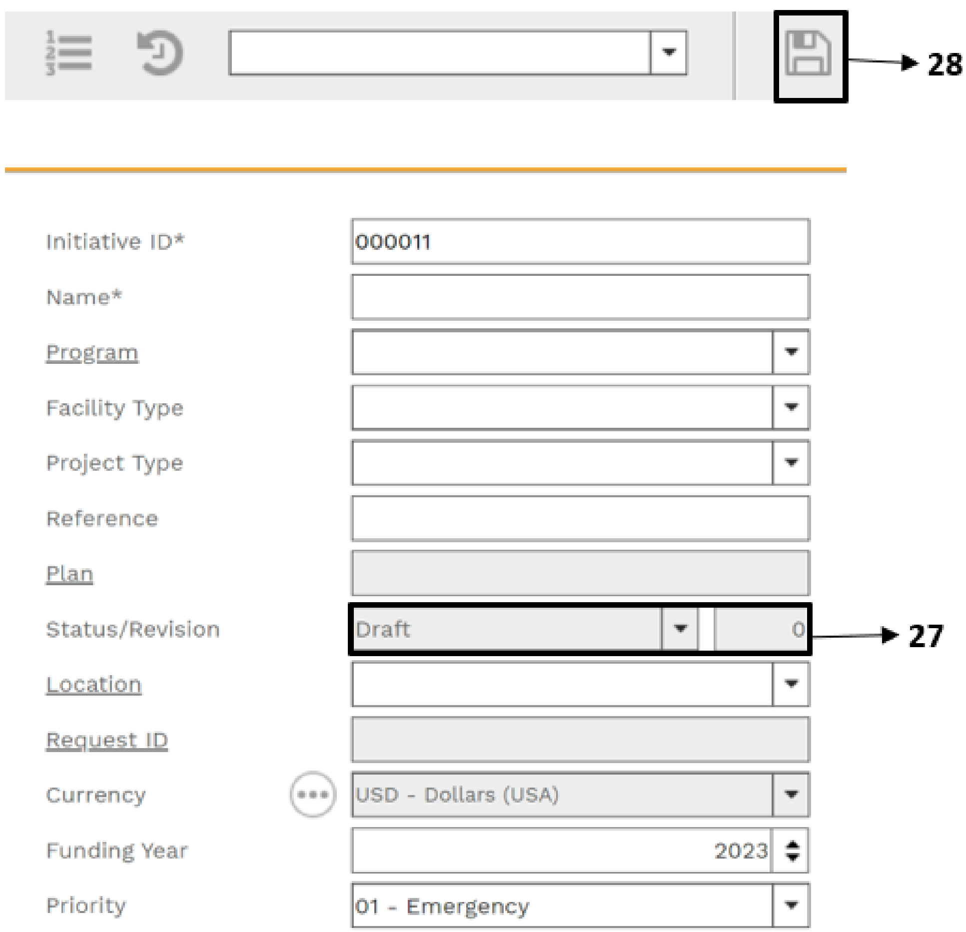
23- After clicking on **+Add** select **Document Manager.**
24- Navigate to **1-01 Approvals** and **2-01 Budget** to upload the files.



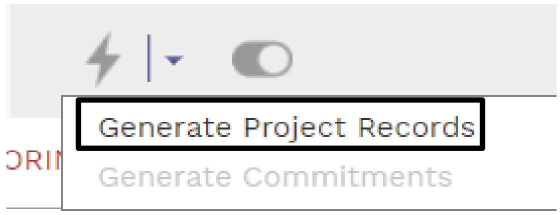
25- Select the **Notes tab** in the top navigation bar to add any notes.



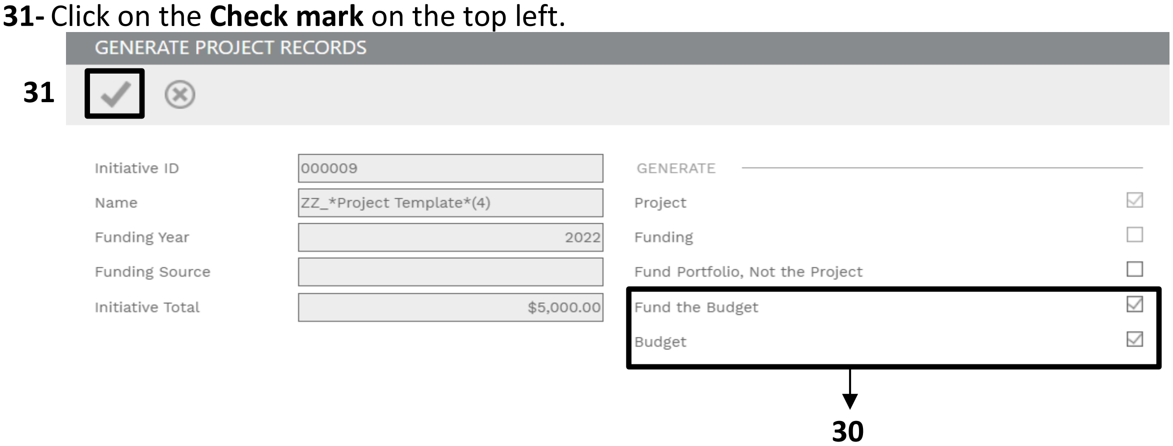
26- Click on the **Main** tab in the top navigation bar.
27- Status/Revision field – Change from **draft** to **Approved.**
28- Click the **Save Icon** in the top bar.



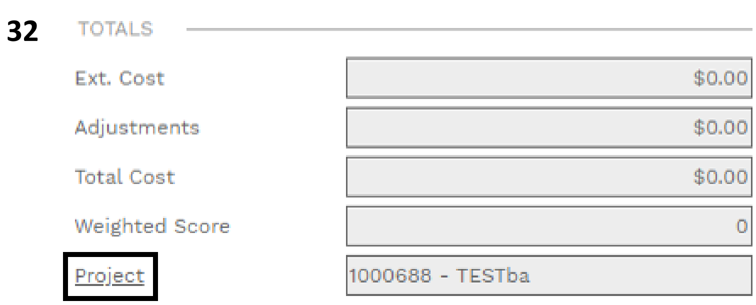
29- In the top bar click on the **generate button** drop down and select **Generate Project Records.**



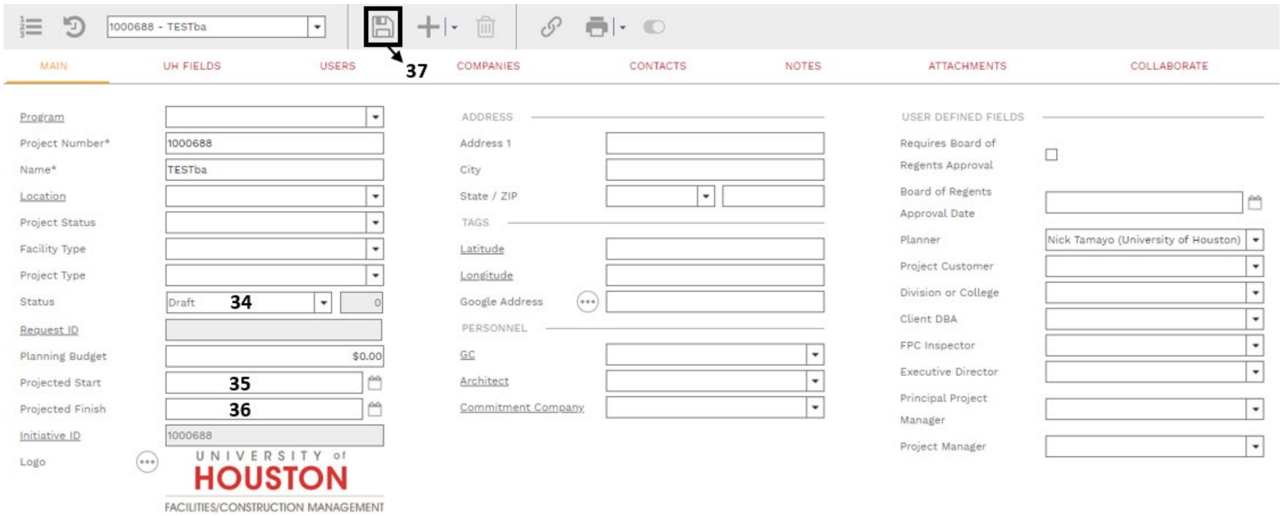
30- On the pop-up screen make sure **Fund the budget** and **Budget** boxes are checked.
31- Click on the **Check mark** on the top left.



32- On the **Main** tab Click on **<u>Project</u>** under the Weighted Score under Totals.



33- Populate all drop-down fields on the **Main** Tab, if applicable.
34- Status field – Change from **draft** to **Approved.**
35- Project Start field – Insert the start date.
36- Project Finish field – Insert the finish date.
37- Click on the **Save Button**.



38- Process complete.

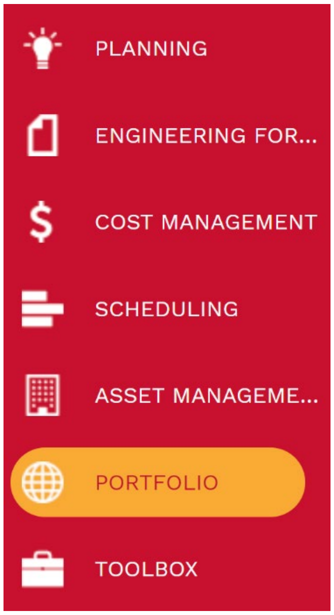
PM & Planner

Add-Delete Project Permissions

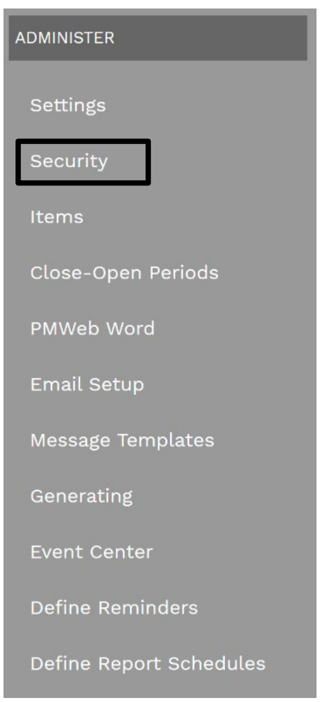
Overview: This process is for a Project Manager or Planner to access rights to assign vendor users for their projects. This should be done promptly once a vendor is and their team members identified. PMs or Planners can also delete user access when an individual leaves a project.

Reference: N/A

1- Click on **PORTFOLIO** from the buttons on the left.



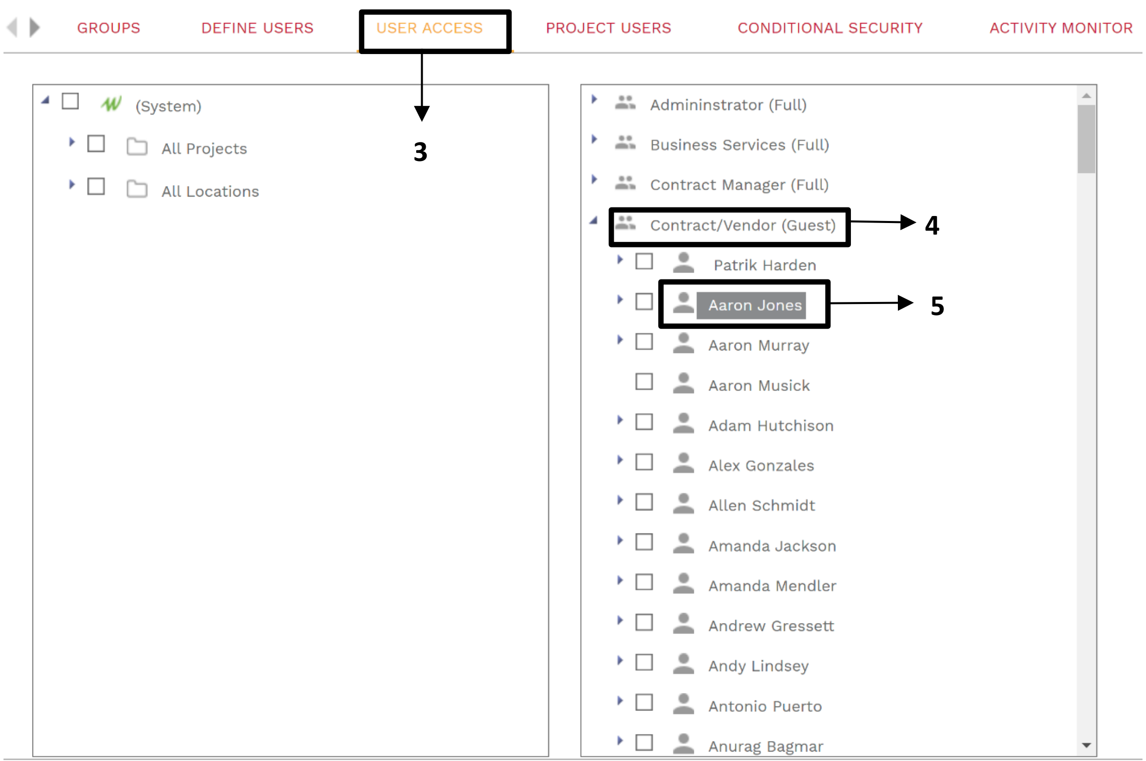
2- **ADMINISTER**, select **Security.**



3- Click on the **User Access** tab.

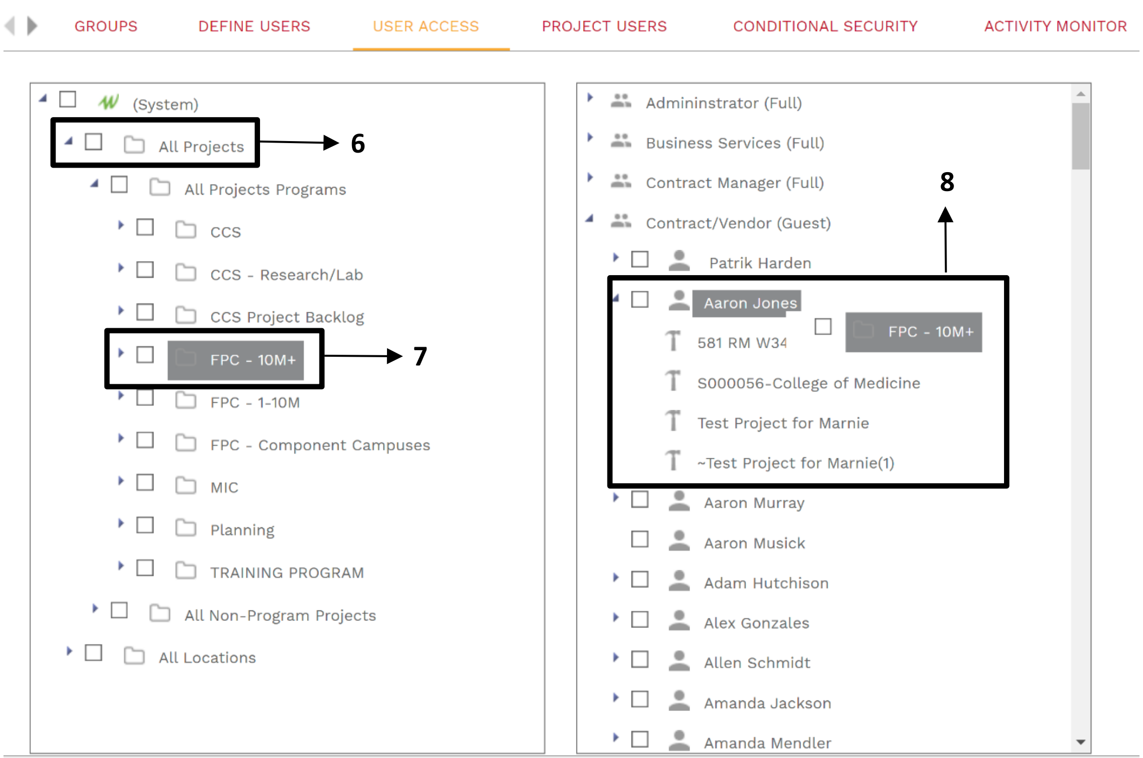
4- Select the needed Permission Group (such as **Contractor/Vendor**) from the list on the right hand side of the screen.

5- Select the individual needing a project added or removed from their permissions.



To ADD a project to the User:

6- Expand the **All Projects** menu
7- Select the appropriate **Program**
8- Drag and drop the desired **Project** over to the User.



To remove a Project from the User

9- Right Click on the Project needing removal
10- Select ***X* Delete**

11- Process Complete.