



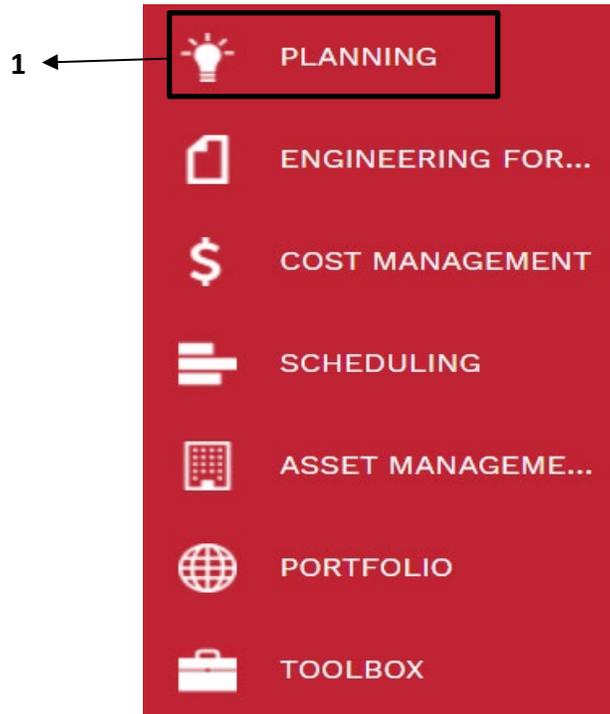
PMWeb

Planning Initiative Steps

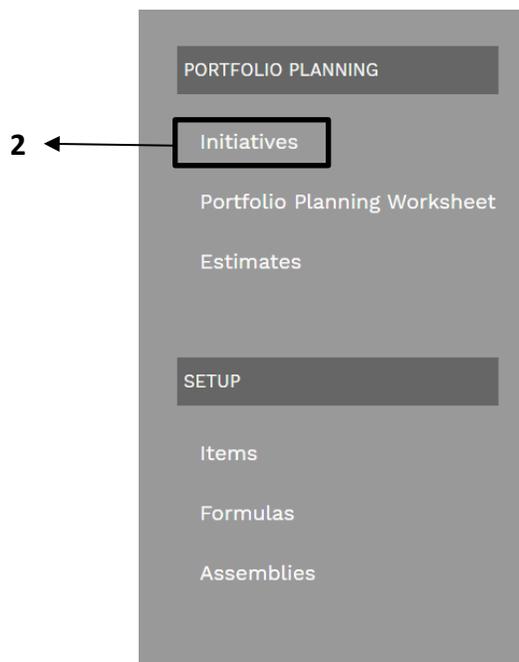
Overview: This guide explains how a project initiative is entered into PM Web for project execution once a project is transitioned to a Project Manager. This process is a step-by-step guide to be followed by the assigned Project Planner.

Reference: N/A

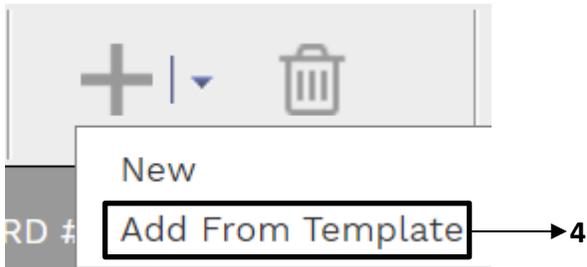
1- Click on the **Planning** on the left panel.



2- Click on **Initiatives**.



- 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**.

A screenshot of the software interface. At the top, a toolbar contains a 'Save' icon (a floppy disk) which is highlighted with a red box and labeled with the number '9'. Below the toolbar is a navigation bar with tabs: MAIN, ADJUSTMENTS, SCHEDULE, UH FIELDS, SCORING, and NOTES (4). The main content area is a form with the following fields:

Initiative ID*	000005 5	TOTALS	
Name*	UHD Wellness & Success Center(1)	Ext. Cost	\$0.00
Program	003 - FPC - Component Campuses	Adjustments	\$0.00
Facility Type		Total Cost	\$0.00
Project Type		Weighted Score	0
Reference		USER DEFINED FIELDS	
Plan		Work Order	
Status/Revision	Draft 0	Requires Board of	
Location		Regents Approval	<input type="checkbox"/>
Request ID		Board of Regents	
Currency	USD - Dollars (USA)	Approval Date	
Funding Year		Planner*	7
Priority		Project Customer	
Planning Start	6	Division or College	
Planning Finish		Client DBA	
Project Manager		FPC Inspector	
		Executive Director	

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

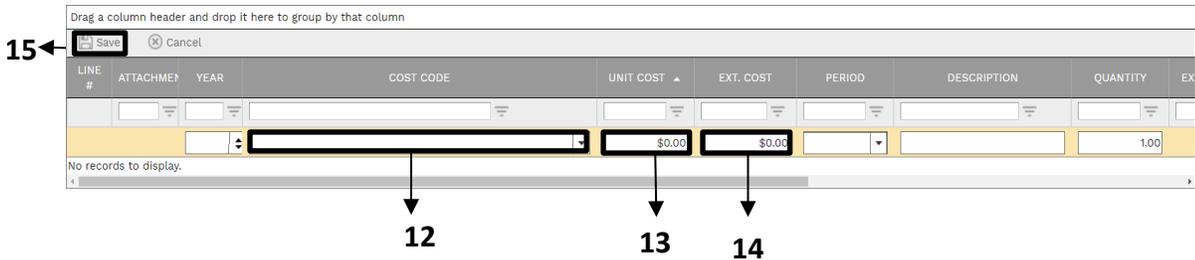


12- **Cost Code field** – Select a cost code.

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**.

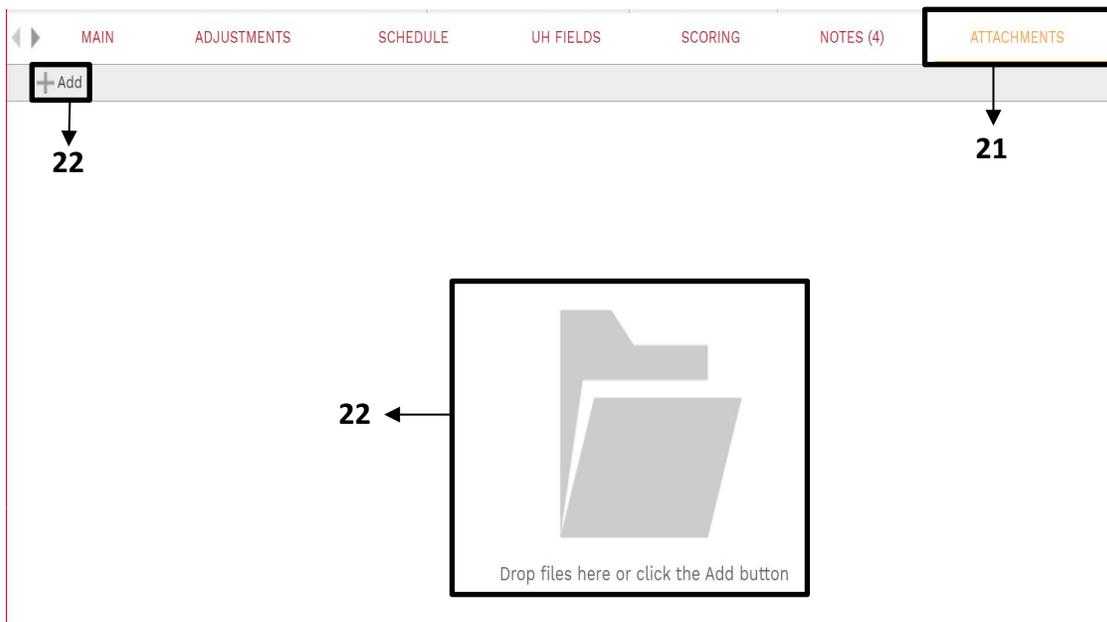
19- Add project information accordingly.

20- **Note:** The information in these fields will be used for PFA Generation.



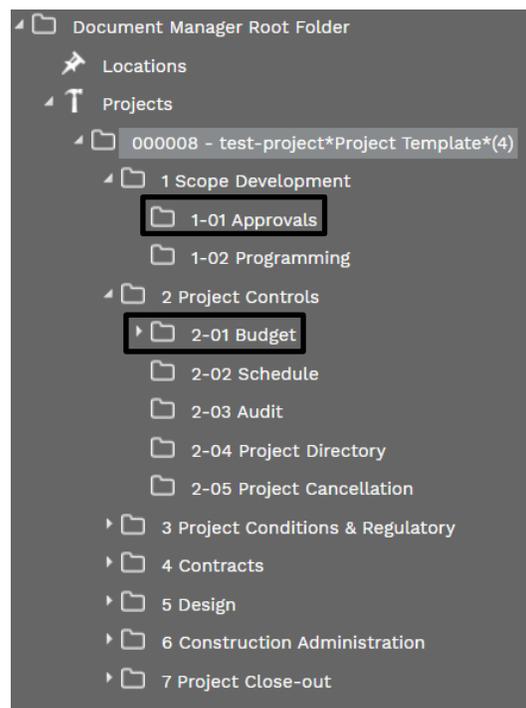
21- Click on the **Attachments tab** at the top navigation bar.

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.

MAIN ADJUSTMENTS SCHEDULE UH FIELDS SCORING **NOTES**

Drag a column header and drop it here to group by that column

Edit + Add Delete Refresh Layouts

ITEM	DESCRIPTION	CREATED BY	CREATED DATE	EDITED BY	EDITED DATE

No records to display.

25

26- Click on the **Main** tab in the top navigation bar.

27- **Status/Revision** field – Change from **draft** to **Approved**.

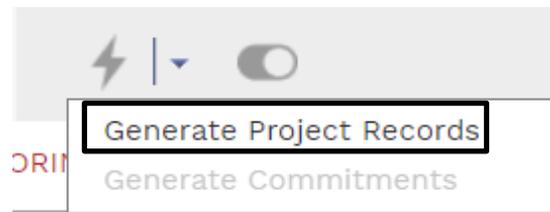
28- Click the **Save Icon** in the top bar.

28

Initiative ID*	<input type="text" value="000011"/>
Name*	<input type="text"/>
<u>Program</u>	<input type="text" value=""/>
Facility Type	<input type="text" value=""/>
Project Type	<input type="text" value=""/>
Reference	<input type="text"/>
<u>Plan</u>	<input type="text"/>
Status/Revision	<input type="text" value="Draft"/> <input type="text" value="0"/>
<u>Location</u>	<input type="text" value=""/>
<u>Request ID</u>	<input type="text"/>
Currency	<input type="text" value="USD - Dollars (USA)"/>
Funding Year	<input type="text" value="2023"/>
Priority	<input type="text" value="01 - Emergency"/>

27

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.

31

GENERATE PROJECT RECORDS			
Initiative ID	000009	GENERATE	
Name	ZZ_*Project Template*(4)	Project	<input checked="" type="checkbox"/>
Funding Year	2022	Funding	<input type="checkbox"/>
Funding Source		Fund Portfolio, Not the Project	<input type="checkbox"/>
Initiative Total	\$5,000.00	Fund the Budget	<input checked="" type="checkbox"/>
		Budget	<input checked="" type="checkbox"/>

↓
30

32- On the **Main** tab Click on **Project** under the Weighted Score under Totals.

32 TOTALS

Ext. Cost	\$0.00
Adjustments	\$0.00
Total Cost	\$0.00
Weighted Score	0
Project	1000688 - TESTba

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**.

1000688 - TESTba

37

MAIN UH FIELDS USERS COMPANIES CONTACTS NOTES ATTACHMENTS COLLABORATE

Program

Project Number* 1000688

Name* TESTba

Location

Project Status

Facility Type

Project Type

Status Draft 34 0

Request ID

Planning Budget \$0.00

Projected Start 35

Projected Finish 36

Initiative ID 1000688

Logo UNIVERSITY of HOUSTON FACILITIES/CONSTRUCTION MANAGEMENT

ADDRESS

Address 1

City

State / ZIP

TAGS

Latitude

Longitude

Google Address

PERSONNEL

GC

Architect

Commitment Company

USER DEFINED FIELDS

Requires Board of Regents Approval

Board of Regents Approval Date

Planner Nick Tamayo (University of Houston)

Project Customer

Division or College

Client DBA

FPC Inspector

Executive Director

Principal Project Manager

Project Manager

38- Process complete.

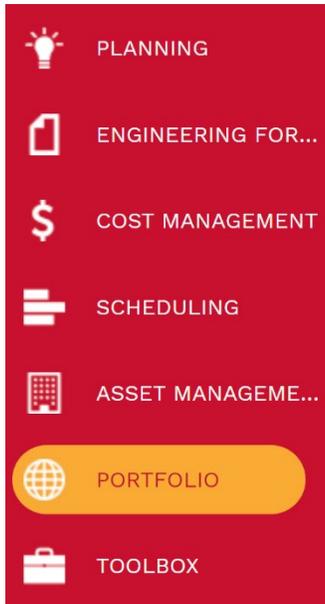
PM & Planner

Add-Delete Project Permissions

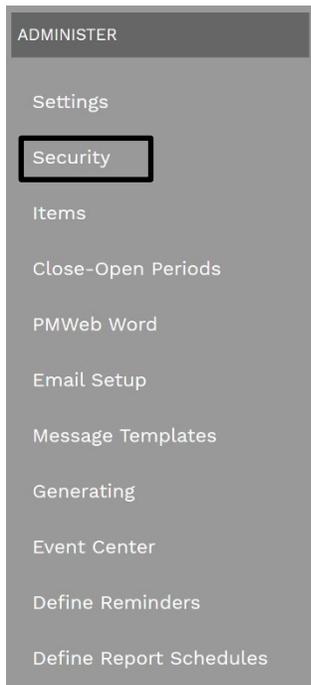
Overview: This process is for a Project Manager or Planner to access rights to assign vendor users for their projects. This should be done promptly once a vendor is and their team members identified. PMs or Planners can also delete user access when an individual leaves a project.

Reference: N/A

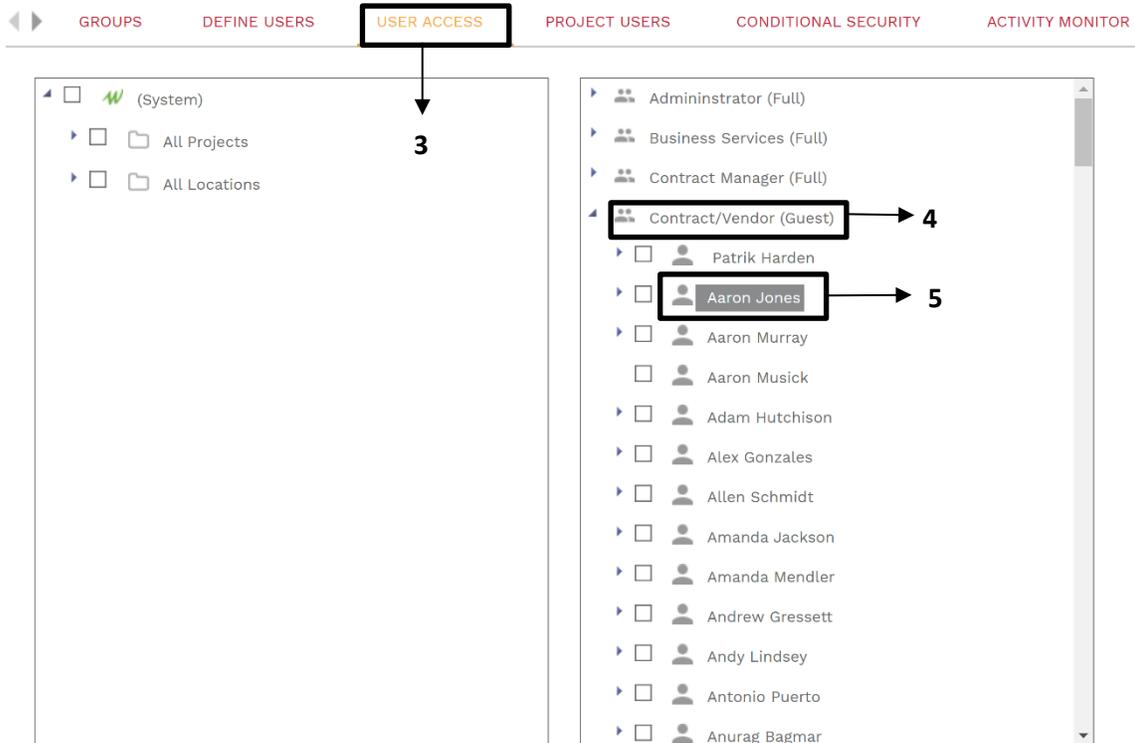
1- Click on **PORTFOLIO** from the buttons on the left.



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

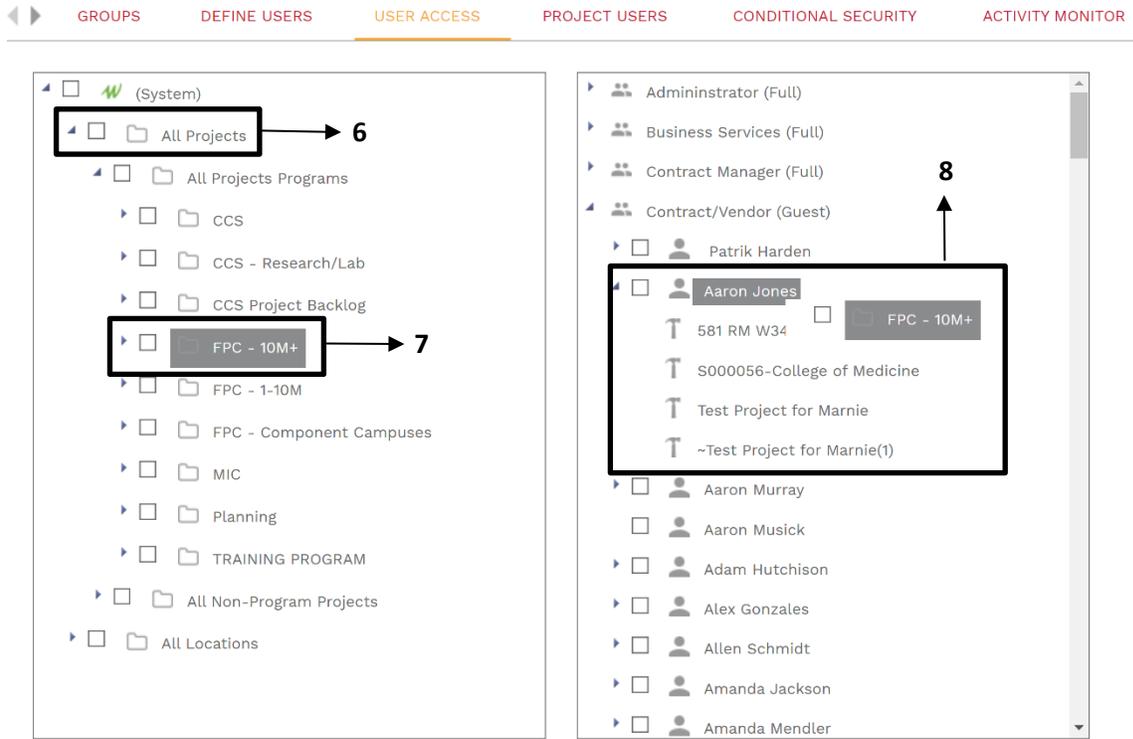


- 3- Click on the **User Access** tab.
- 4- Select the needed Permission Group (such as **Contractor/Vendor**) from the list on the right hand side of the screen.
- 5- Select the individual needing a project added or removed from their permissions.



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

