

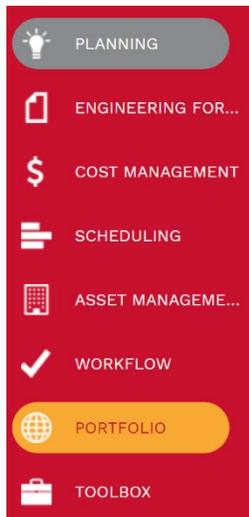
PMWeb Quick Reference

PM ROLE

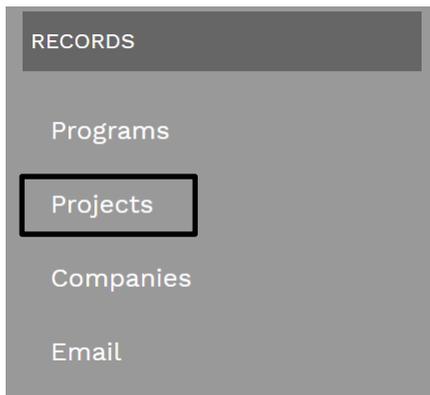
Overview: This is an overview of PM actions once a project transitions to them.

Reference:

1. Select the **Portfolio** on the left menu.



2. Find the Record in the left menu and then select Projects.



3. Select your **Project and review all information in the header to ensure accuracy. Program, project number, project name, location, project status, facility type, project type, planning budget, board approved date and assignments of key stakeholders.**

<u>Program</u>	<input type="text"/>	<u>ADDRESS</u>	<input type="text"/>	<u>USER DEFINED FIELDS</u>	<input type="text"/>
Project Number*	<input type="text" value="BN0012345"/>	Address 1	<input type="text"/>	Requires Board of Regents Approval	<input type="checkbox"/>
Name*	<input type="text" value="BN Test for CCS"/>	City	<input type="text"/>	Board of Regents Approval Date	<input type="text"/>
<u>Location</u>	<input type="text"/>	State / ZIP	<input type="text"/>	Planner	<input type="text"/>
Project Status	<input type="text" value="02 - Design & Construction"/>	<u>TAGS</u>	<input type="text"/>	Project Customer	<input type="text"/>
Facility Type	<input type="text" value="Office, General"/>	<u>Latitude</u>	<input type="text"/>	Division or College	<input type="text"/>
Project Type	<input type="text" value="03 - Renovation"/>	<u>Longitude</u>	<input type="text"/>	Client DBA	<input type="text"/>
Status	<input type="text" value="Draft"/> <input type="text" value="0"/>	Google Address	<input type="text"/>	FPC Inspector	<input type="text"/>
<u>Request ID</u>	<input type="text"/>	<u>PERSONNEL</u>	<input type="text"/>	Executive Director	<input type="text"/>
Planning Budget	<input type="text" value="\$0.00"/>	<u>Client</u>	<input type="text"/>	Principal Project Manager	<input type="text"/>
Projected Start	<input type="text"/>	<u>GC</u>	<input type="text"/>	Project Manager	<input type="text"/>
Projected Finish	<input type="text"/>	<u>Architect</u>	<input type="text"/>		
Logo		<u>Commitment Company</u>	<input type="text"/>		

4. Also, select the Contractor and Architect from the drop-down menu.

PERSONNEL

Client

GC

Architect

Commitment Company

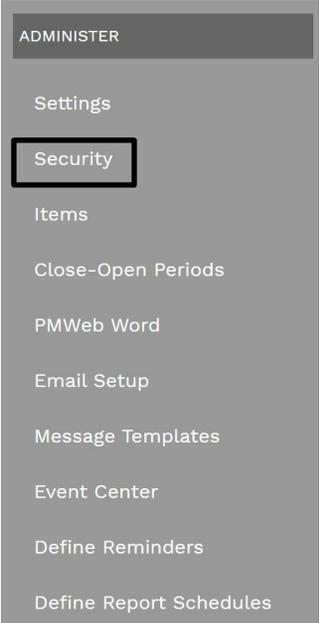
5. Select the **UH Fields** tab & review the information listed in each section to insure it's complete.

MAIN	UH FIELDS	PHASES	USERS	COMPANIES	CONTACTS	CHECKLISTS	NOTES (1)	ATTACHMENTS
Project Information								
Edit								
UH FIELD	DATA					NOTES		
Overview or Justification								
Project Area(s) Description								
Project Scope of Work								
Project Scope of Work Assumptions								
Initial Payment Needed						\$0.00		
Special Notes								
Maintained by								
Project GSF								
Current Project GSF								

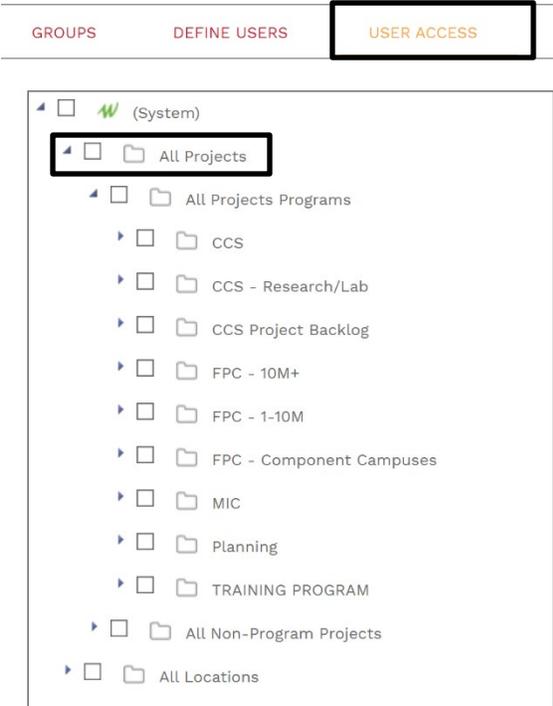
6. Select the **Users** tab and expand the page size to 250. Make sure the workflow is completely assigned with no roles assigned to the admin.

LOCKE	LEVEL	ROLE*	USER*
<input type="checkbox"/>	System	Administrative	admin (admin)
<input type="checkbox"/>	System	Architect - Engineer Firm	admin (admin)
<input type="checkbox"/>	System	Archive	Austin Harwell(atharwel)
<input type="checkbox"/>	System	Assistant Director - Contrac	Erica Sims(edsims)
<input type="checkbox"/>	System	Attorney	Lindsay Canning(lacanning)
<input type="checkbox"/>	System	Business Services - Cost Ce	Michelle Le(MichelleL)
<input type="checkbox"/>	System	Business Services - Funding	Ampelio Juarez(aajuarez)
<input type="checkbox"/>	System	Business Services - Invoice/	Toccaro Randle(ToccaroR)
<input type="checkbox"/>	System	Business Services - Invoice/	Darron Johnson(dmjohns7)
<input type="checkbox"/>	System	Chancellor	Renu Khator(rkhatore)
<input type="checkbox"/>	System	Civil 1	David Geis(dsgeis)
<input type="checkbox"/>	System	Client	admin (admin)
<input type="checkbox"/>	System	Client DBA	admin (admin)

7. Select **Portfolio** then select Security from the **Administer** tab.



8. Click on the **User Access** tab and expand **All Projects** and select the desired project.



9. Drag and drop the project to the desired user to give them access.

The screenshot displays the 'USER ACCESS' tab in a software interface. On the left, a tree view shows a hierarchy of folders under '(System)'. The folder 'FPC - 1-10M' is highlighted with a black box. On the right, a list of users is shown. The user 'Khizer Ali' is also highlighted with a black box, and a grey box labeled 'FPC - 1-10M' is positioned next to it, indicating the drag-and-drop action.

10. Select **Portfolio** then on the left menu under record select **projects**.

The screenshot shows a vertical menu with the following items: RECORDS, Programs, Projects, Companies, and Email. The 'Projects' item is highlighted with a black box.

11. Select the **Companies tab** and click the **+ button** to add the desired company.

MAIN UH FIELDS PHASES USERS COMPANIES

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

+ Add Delete Refresh Layouts

COMPANY CODE	COMPANY NAME	ADDRESS 1	ADDRESS 2	CI
<input type="text"/>				

No records to display.

1 PAGE SIZE 20

12. Repeat the same process for the **Contacts tab**.

MAIN UH FIELDS PHASES USERS COMPANIES CONTACTS

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

+ Add Delete Refresh Layouts

FIRST NAME	LAST NAME	TITLE	CONTACT	COMPANY	COMPANY
<input type="text"/>					

No records to display.

1 PAGE SIZE 20

13. Select the **Notes tab** and add a description of the current activity. This section is to be updated monthly.

MAIN UH FIELDS PHASES USERS COMPANIES CONTACTS CHECKLISTS **NOTES (1)**

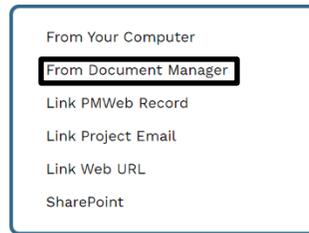
Drag a column header and drop it here to group by that column

Edit **+ Add** Delete Refresh Layouts

ITEM	DESCRIPTION	CREATED BY	CREATED DATE	EDITED BY	EDITED D
1	Note 1	10315 - kali27	12-21-2022	10315 - kali27	12-21-



14. Select the **Attachments tab and add+ to Document Manager all relevant project material.**



Drop files here or click the Add button

15. Process Complete