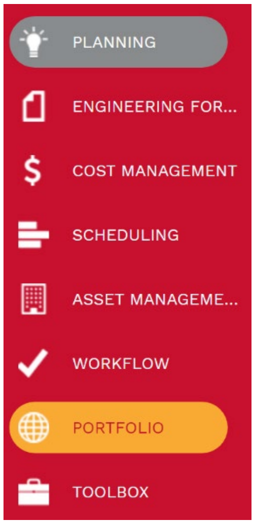
PMWeb Quick Reference

PM ROLE

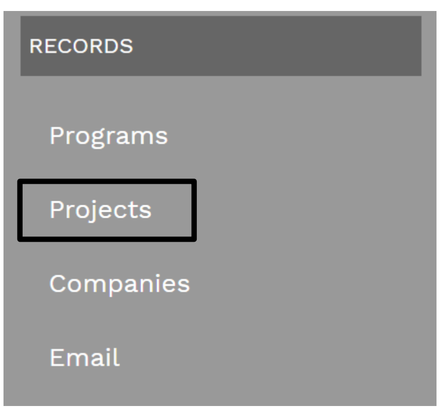
Overview: This is an overview of PM actions once a project transitions to them.

Reference:

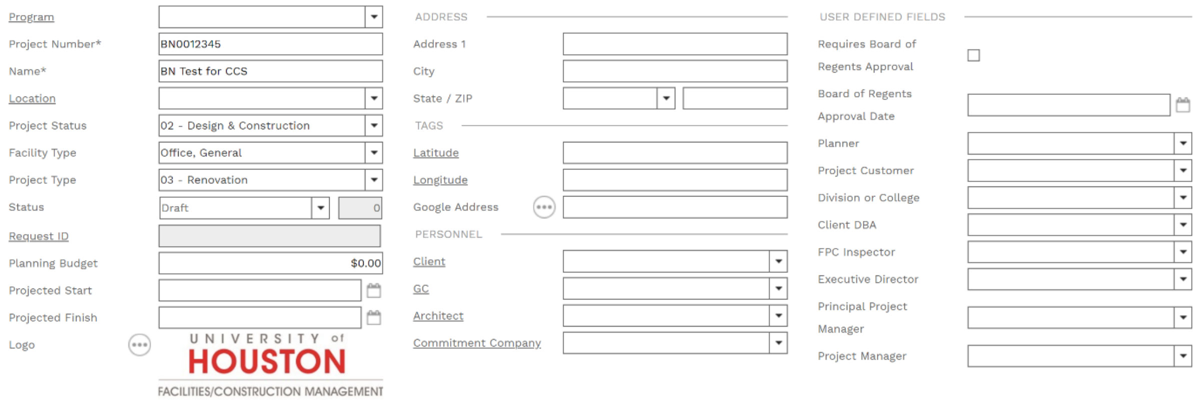
1. Select the **Portfolio** on the left menu.



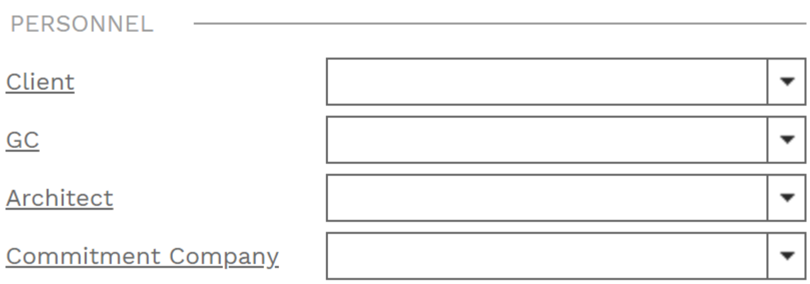
2. Find the Record in the left menu and then select Projects.



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.



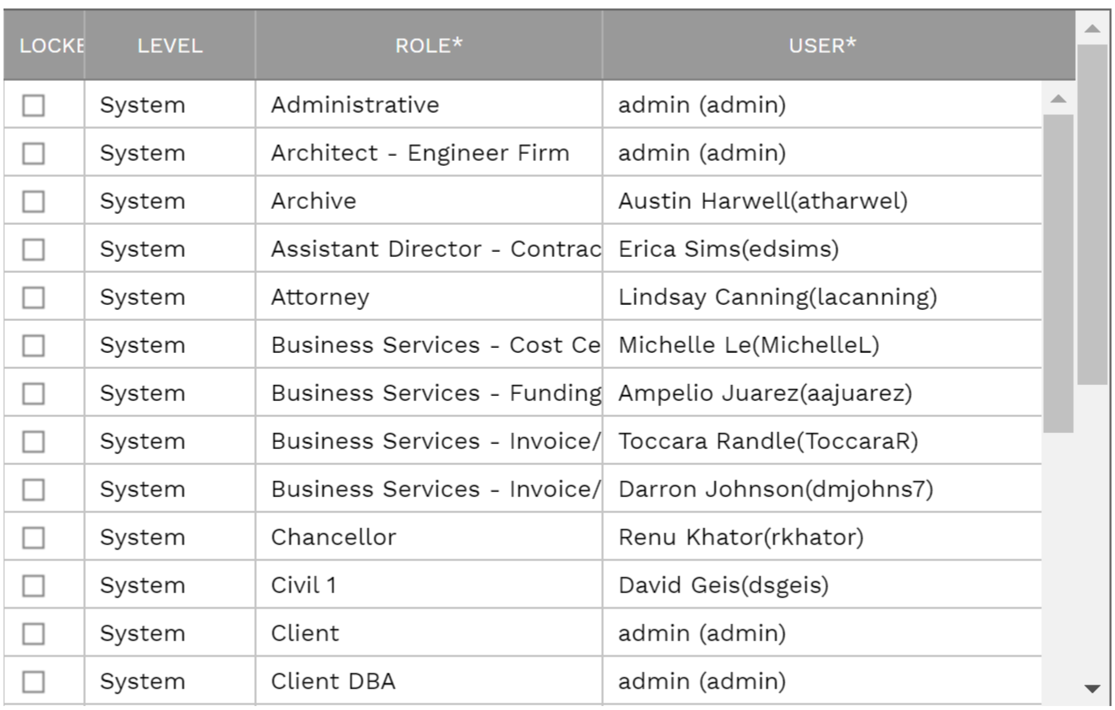
4. Also, select the Contractor and Architect from the drop-down menu.



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

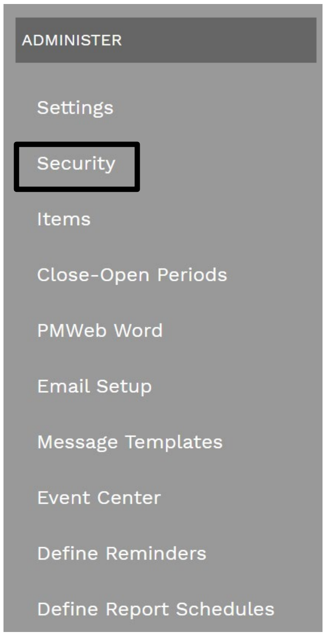
UH FIELD	DATA	NOTES
Overview or Justification		
Project Area(s) Description		
Project Scope of Work		
Project Scope of Work Assumptions		
Initial Payment Needed	$0.00	
Special Notes		
Maintained by		
Project GSF		
Current Project GSF		

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.

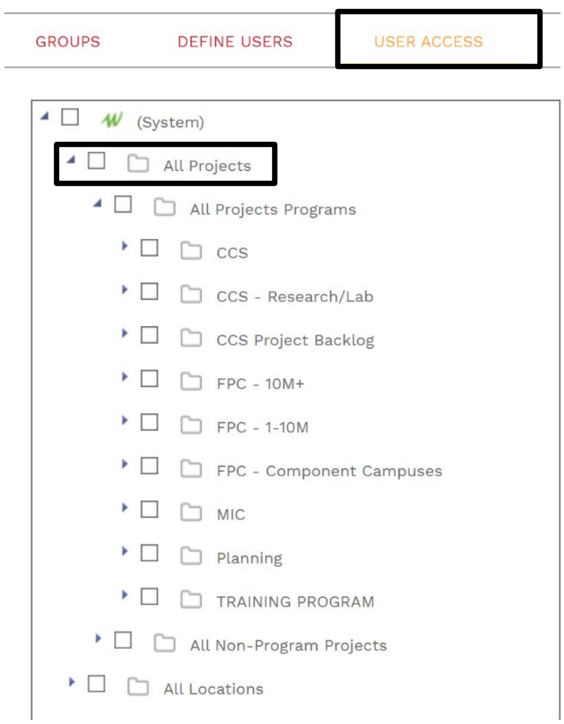


LOCKE	LEVEL	ROLE*	USER*
☐	System	Administrative	admin (admin)
☐	System	Architect - Engineer Firm	admin (admin)
☐	System	Archive	Austin Harwell(atharwel)
☐	System	Assistant Director - Contrac	Erica Sims(edsims)
☐	System	Attorney	Lindsay Canning(lacanning)
☐	System	Business Services - Cost Ce	Michelle Le(MichelleL)
☐	System	Business Services - Funding	Ampelio Juarez(aajuarez)
☐	System	Business Services - Invoice/	Toccara Randle(ToccaraR)
☐	System	Business Services - Invoice/	Darron Johnson(dmjohns7)
☐	System	Chancellor	Renu Khator(rkhator)
☐	System	Civil 1	David Geis(dsgeis)
☐	System	Client	admin (admin)
☐	System	Client DBA	admin (admin)

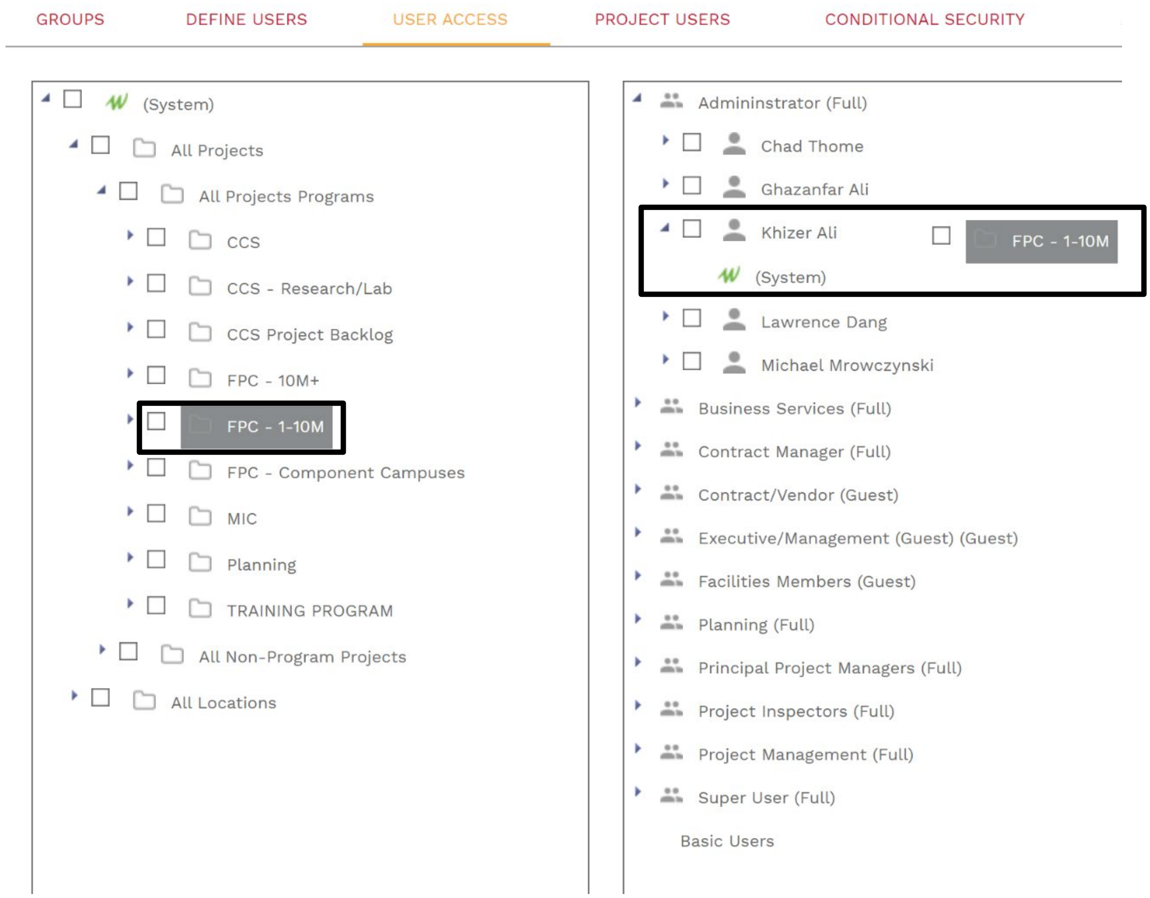
7. Select **Portfolio** then select Security from the **Administer tab**.



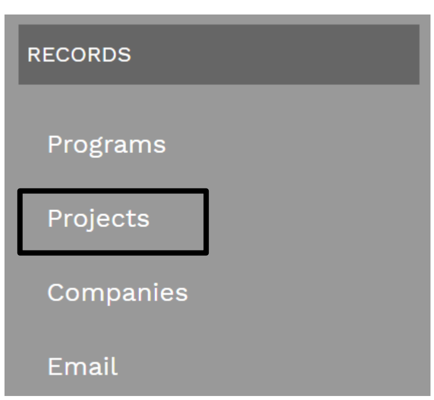
8. Click on the **User Access** tab and expand **All Projects** and select the desired project**.**



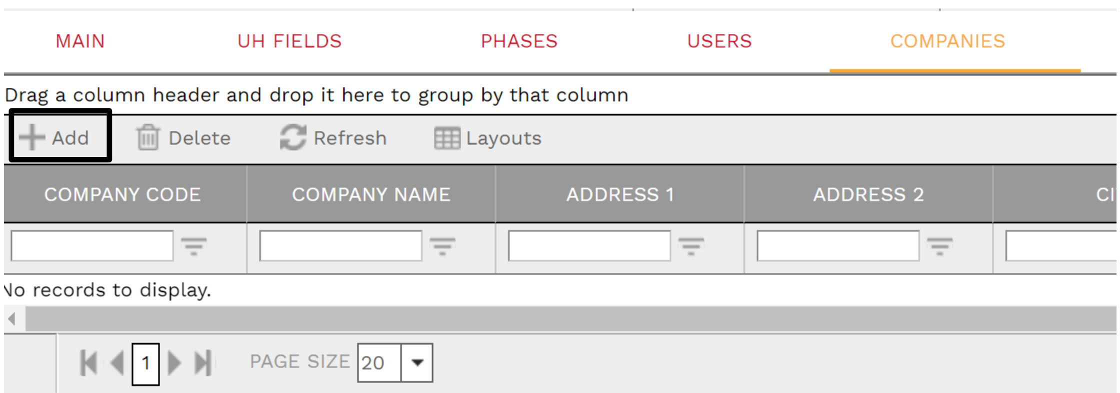
9. Drag and drop the project to the desired user to give them access.



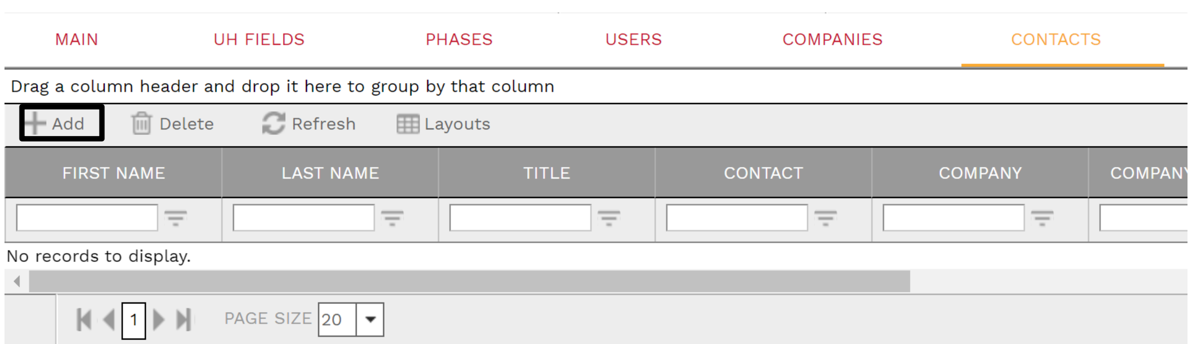
10. Select **Portfolio** then on the left menu under record select **projects**.



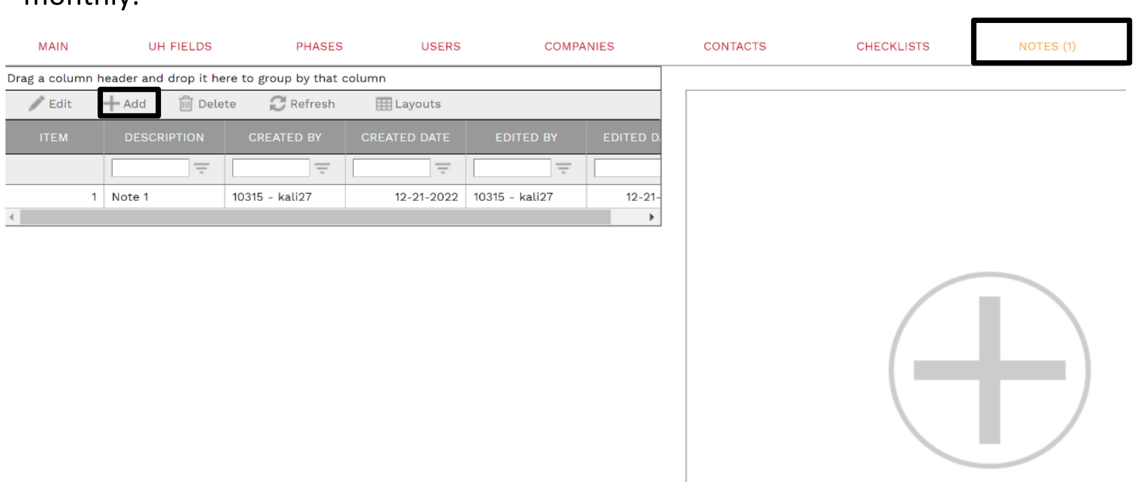
11. Select the **Companies tab** and click the **+ button** to add the desired company.



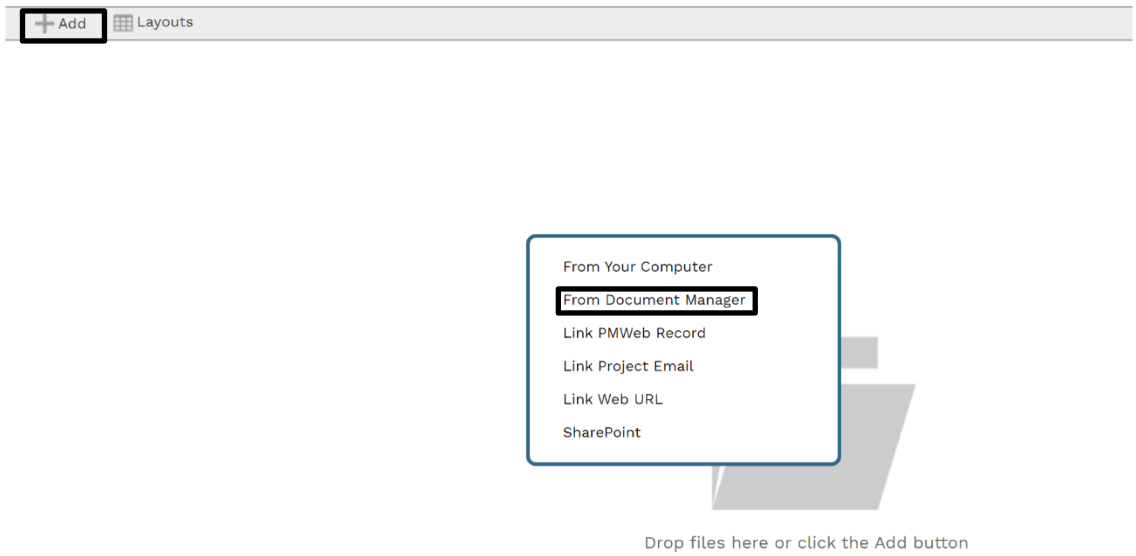
12. Repeat the same process for the **Contacts** tab.



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



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



15. Process Complete