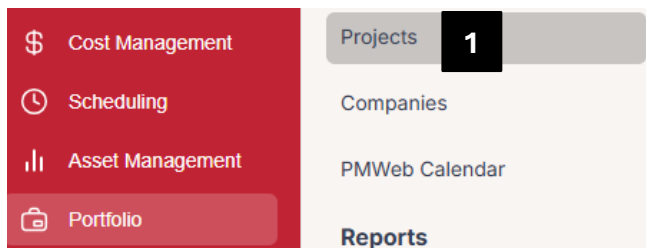


PM

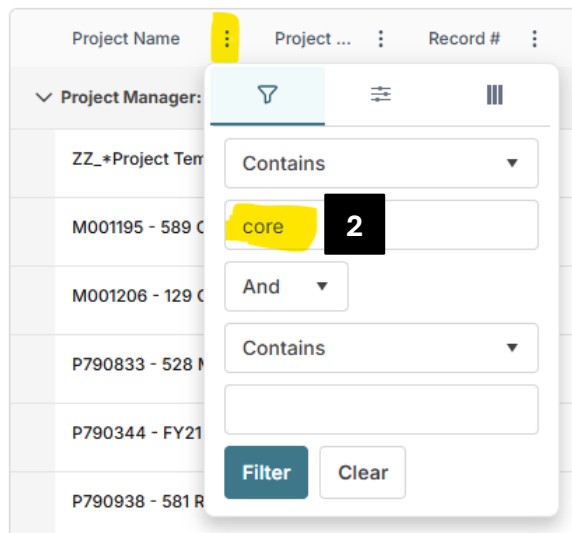
PM Role in Transitioning projects to the Capital Projects Team

Overview: Project managers (PM) have an important role in establishing projects in PM Web and setting up the project team. This is an overview of PM actions once a project transitions to them.

Reference: n/a



1- Under **Portfolio** select **Projects**.



2- To find your project, select the three dots next to the **Project Name** header, then enter key words from the project name or the project number in the **Contains** field.

3- Select your project by clicking on the underlined **Record #**.

4- 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.

5- In the **PERSONNEL** section, enter the GC, Architect and Manager information. You can start typing in the field box to narrow the search.

Main **UH Fields** Users Companies Contacts Notes (22) Attachments (2)

Project Information

	Spec	Data	Notes
☐	Overview or Justification		
☐	Project Area(s) Description		
☐	Project Scope of Work	\$1.2M in door access control to be upgraded. ADA Issues - Entrance ramps/handrails, fire ...	
☐	Project Scope of Work Assumptions		
☐	Initial Payment Needed		\$0.00
☐	Special Notes		

6- Select the **UH Fields** tab & review each section to ensure information is complete.

Main **UH Fields** **Users** Companies Contacts Notes (22) Attachments (2)

PROJECT ACCESS

- Administrator (Full)
- Administration (Full)
- Basic Users
- Business Services (Full)
- Client Users (Guest)
- Contract Manager (Full)
- Contract/Vendor (Guest)
- Aatif Shaik
- Adrianna Hernandez
- Alex Frere

Only display users with access

S000059 - Core Renovation

- Administrator (Full)
- Project Management
- Basic Users
- Contract/Vendor (Guest)
- Super User (Full)
- Planning (Full)

WORKFLOW ROLES

Users

- admin (admin)
- Alexander Pena (aspena3)
- Brittane Adams (BrittaneA)
- Grayson Williams, (gmwilli5)
- Lawrence Dang (ldang2)
- Mathew Douglas (mmdoug12)
- Nick Merry (NickM)
- Yasmine Bell (ybell)

View Unlocked Roles Only

View Roles in Use Only

LOCKED	LEVEL	ROLE*	
☐	System	Contract Coordinator 6	admin (admin)
☐	System	Contract Coordinator 1	admin (admin)
☐	System	Contract Coordinator 2	admin (admin)
☐	System	Contract Coordinator 3	admin (admin)
☐	System	Contractor 1 (PM)	Phillip Miller (pmiller)
☐	System	Contractor 2	Alex Frere (afrere)

7- Select the **Users** tab and review all workflow roles and make sure they are assigned. As personnel are added or changed, be sure to return to this tab and update roles

Main **UH Fields** **Users** **Companies** **Contacts** Notes (22) Attachments (2)

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	CITY
0000134109	PAGE SOUTHERLAND PA			
0000096898	TELLEPSSEN BUILDERS LI			

8- Select the **Companies** tab.

9- To add a company, click on + Add.

ms

st M

hec

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

COMPANY CODE	COMPANY NAME

10- Under the **COMPANY NAME** column. Start typing the company name then select from the company names.

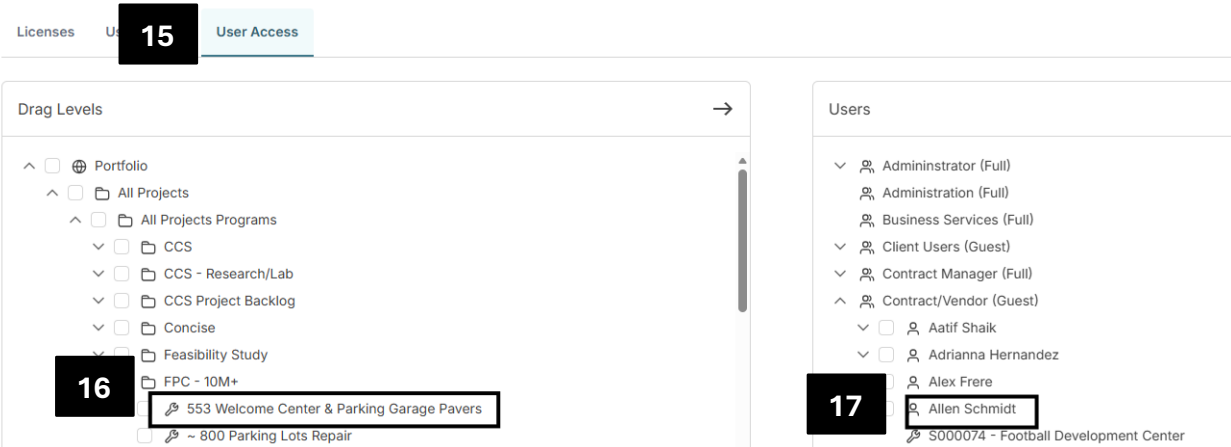
11- To add contacts, select the **Contacts** tab and follow the same process as adding a company.

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

13- Add any relevant project material at turnover to the **Attachments** tab.



14- To assign users access to your project, under Portfolio, select Security.



15- Select the **User Access** tab

16- Find your project by drilling down in the **Drag Levels** section. If you are having difficulty finding your project, hold down the control button and press 'F' then type in a key work from the project title in the pop up.

17- Find the user by drilling down in the **Users** section.

18- Drag and drop the project to the desired user name to assign access.

19- Process Complete.