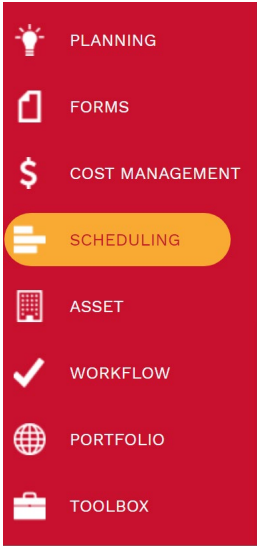UNIVERSITY of
HOUSTON
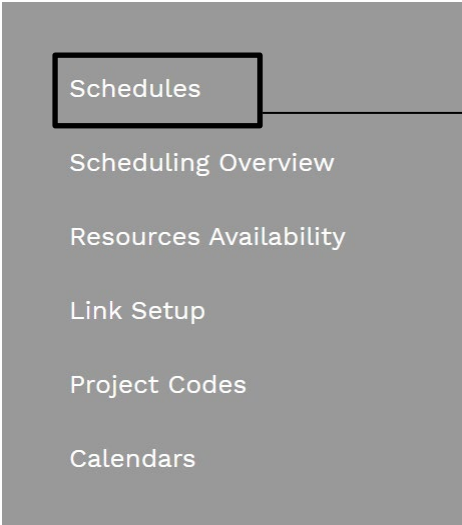FACILITIES SERVICES

PMWeb

Planning Schedule Steps

1- Click on **Scheduling** on the left.

2- Select **Schedules.**

3- Click on the ➕ icon or select the desired project.

4- Description field – Type in the description for the schedule.

5- Type Field – Select the type of schedule.

6- Category Field – Select the Category of the schedule.

7- Calendar Field – Select the type of Calendar.

8- Set as Project Schedule – If you have multiple schedules, check this to tie the current schedule to the project.

Project*	1000263-Interim - Nick Merry Test ▼
Description	Copy (1) of Initial **4**
Type	**5** ▼
Category	**6** ▼
Reference	
Status / Revision	Draft ▼ 0
Calendar	**7** ▼
Set As Project Schedule	**8** ☐
Link % Complete to Actual Costs	☐
Link % Complete to Remaining Duration	☐
Schedule Tasks	Manually ▼
Status Date	03-02-2022 📅

9- In the **bottom tab, start and finish fields** can be changed as desired.

10- Click on the **Checkmark** and **Save** icon.

11- Display Menu Button – You can click on the display menu button to chose which columns are visible.

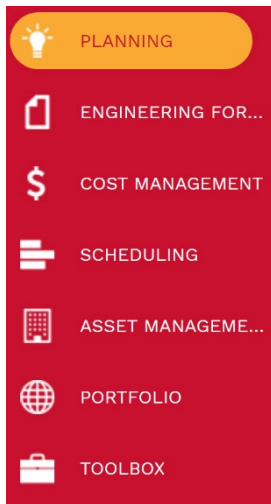**12-** You can change the completion of different items and the overall schedule will be updated.
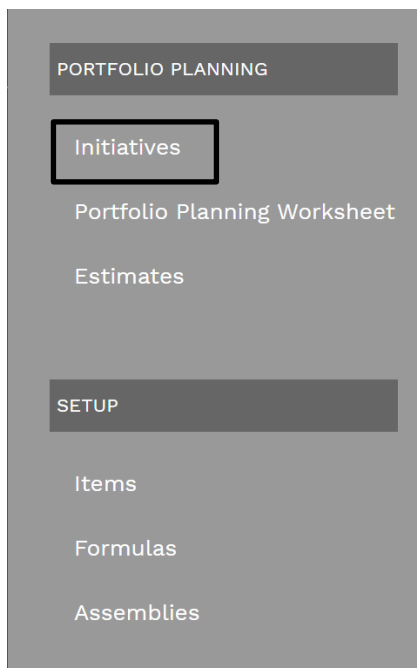

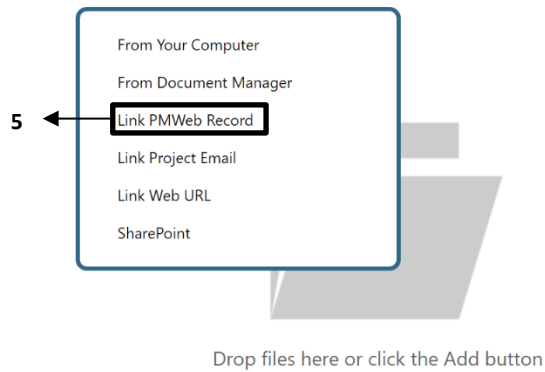**13-** Click on the 💾 icon in the top header.

Link to Initiative

1- Click on **Planning**.

2- Select **Initiatives** under **Portfolio Planning.**

1- Select the Desired Project to link the estimate.
2- In the **Top Navigation bar** select **Attachments.**
3- Click on the **+ Icon** and select **Link PMWeb Record.**

MAIN	NOTES	ATTACHMENTS

+ Add

5

From Your Computer

From Document Manager

Link PMWeb Record ← 5

Link Project Email

Link Web URL

SharePoint

Drop files here or click the Add button

4- Expand **Scheduling.**
5- Expand **Schedules.**
6- Drag the desired schedule to the right.
7- Click the **Save and exit icon.**

LINK RECORDS   ✕

💾 📄 ⊗ → 7

🔍

		Delete	🔄 Refresh				
		RECORD TYPE	RECORD #	DATE	REVISION	STATUS	DESCRIPTION

▲ T 1000263-Interim - Nick Merry Test   No records to display.
  ▸ 📁 Planning
  ▸ 📁 Forms
  ▸ 📁 Cost Management
  ▲ 📁 Scheduling   → 4
    ▲ 📁 Schedules
      ☐ 10495 - Initial Schedule
      ☐ 10576 - Copy (1) of Initial Schedule   → 6 (Drag and drop here)
      ☐ 10577 -
      ☐ 30676 -
    ▸ 📁 Custom Forms
  ▸ 📁 Portfolio
  ▸ 📁 Toolbox
  ☐ 📌 UHCL - UH Clear Lake Campus