

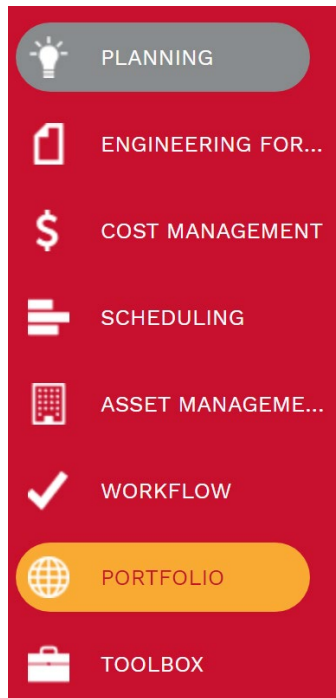


PMWeb Quick Reference

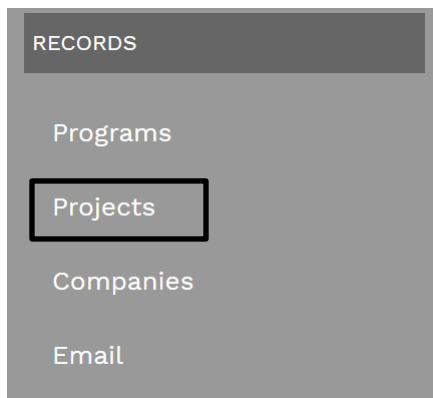
PM ROLE

Setting up a Project as a Project Manager

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



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

<u>PERSONNEL</u>	
<u>Client</u>	
<u>GC</u>	
<u>Architect</u>	
<u>Commitment Company</u>	

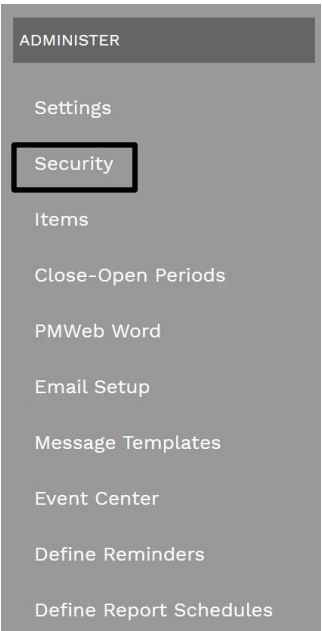
5. Select the **UH Fields** tab & review the information listed in each section to insure it's complete.

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								

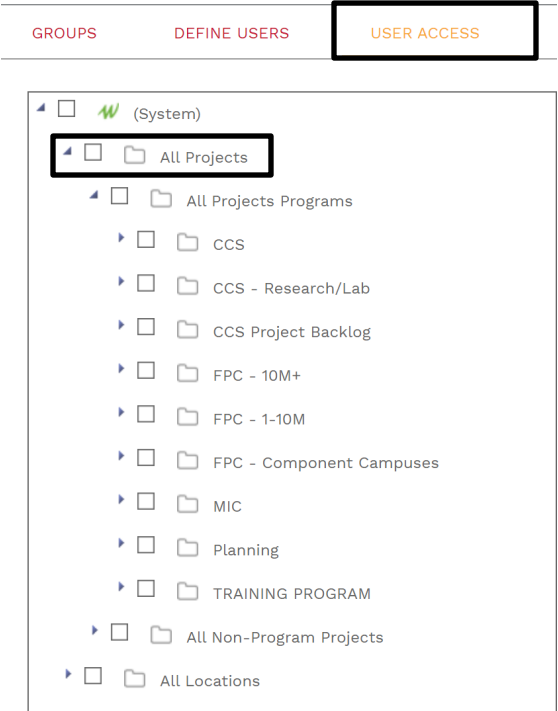
6. Select the **Users** tab and expand the page size to 250. Make sure the workflow is completely assigned with no roles assigned to the admin.

LOCKED	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/	Tocara Randle(TocaraR)
<input type="checkbox"/>	System	Business Services - Invoice/	Darron Johnson(dmjohns7)
<input type="checkbox"/>	System	Chancellor	Renu Khator(rkhatior)
<input type="checkbox"/>	System	Civil 1	David Geis(dsgeis)
<input type="checkbox"/>	System	Client	admin (admin)
<input type="checkbox"/>	System	Client DBA	admin (admin)

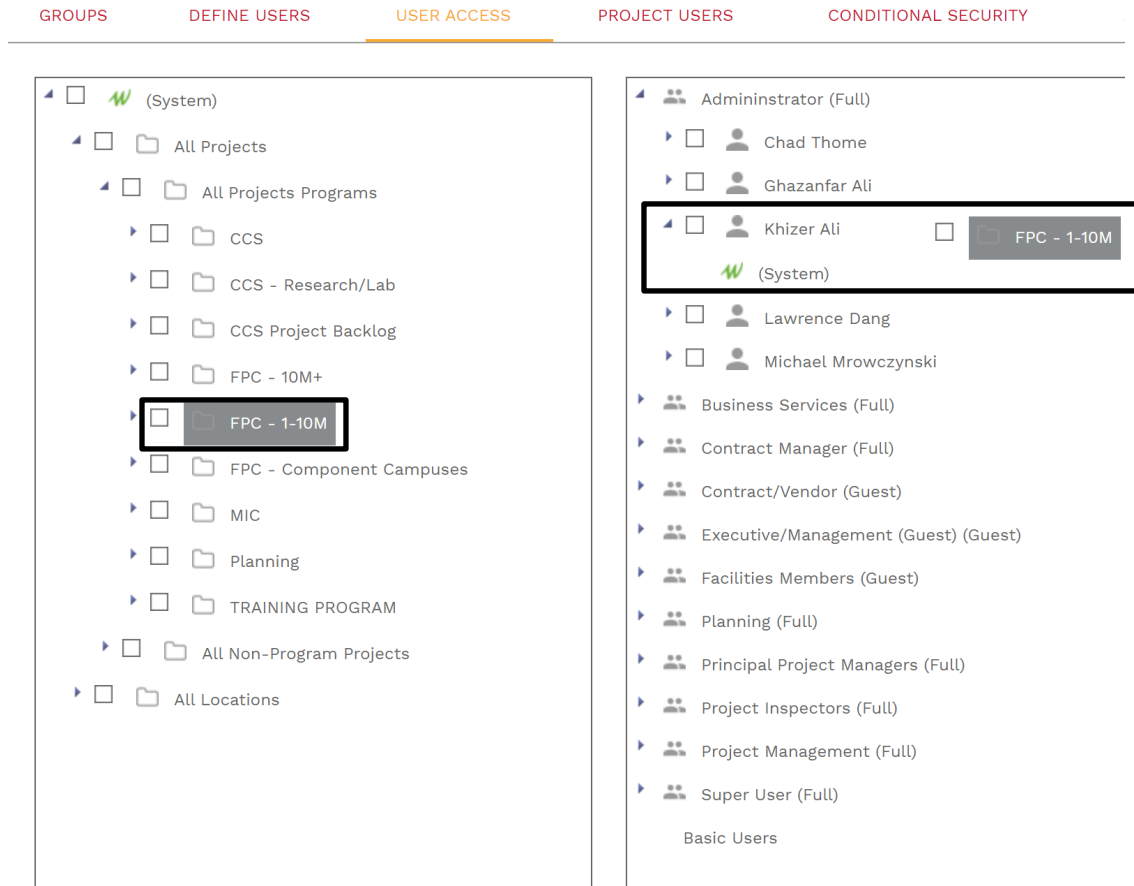
7. Select **Portfolio** then select Security from the **Administer** tab.



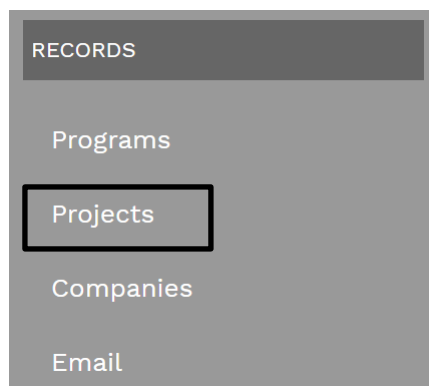
8. Click on the **User Access** tab and expand **All Projects** and select the desired project.



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



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.

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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<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)**

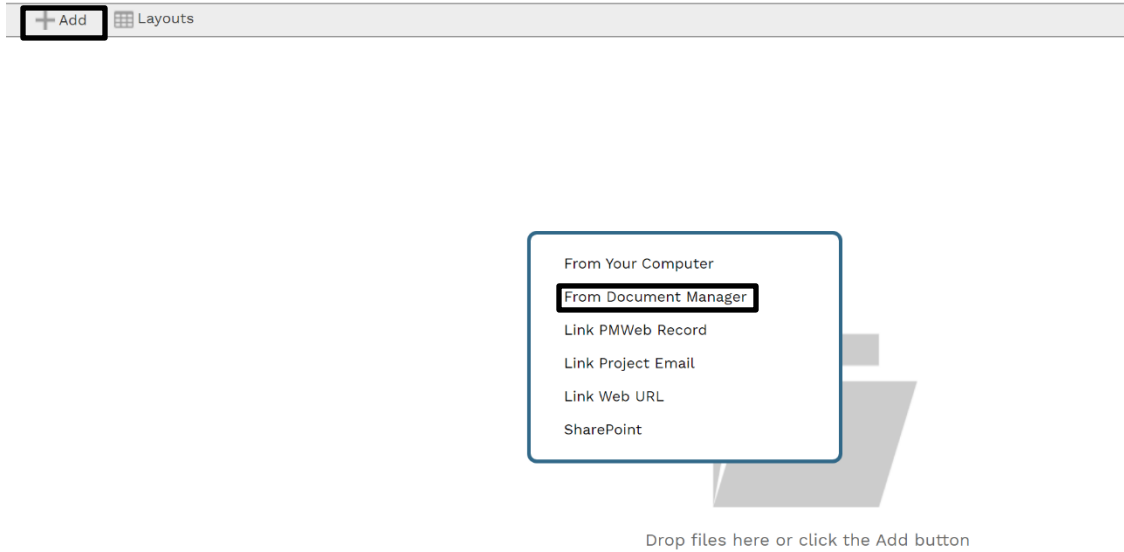
Drag a column header and drop it here to group by that column

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.**



15. Process Complete