Rev October 2024

# UNIVERSITY of HOUSTON FACILITIES SERVICES

### **PMWeb**

## **Planning Initiative Steps**

**Overview:** This guide explains how a project initiative is entered into PM Web for project execution once a project is transitioned to a Project Manager. This process is a step-by-step guide to be followed by the assigned Project Planner.

Reference: N/A



- 3- Click on the drop-down arrow next to the ADD button.
- 4- Select Add from Template and select TEMP\_PROJ\_01.



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38- Process complete.

#### **PM & Planner**

#### **Add-Delete Project Permissions**

Overview: This process is for a Project Manager or Planner to access rights to assign vendor users for their projects. This should be done promptly once a vendor is and their team members identified. PMs or Planners can also delete user access when an individual leaves a project.

Reference: N/A

1- Click on **PORTFOLIO** from the buttons on the left.



2- ADMINISTER, select Security.

ADMINISTER
Settings
Security
Items
Close-Open Periods
PMWeb Word
Email Setup
Message Templates
Generating
Event Center
Define Reminders
Define Report Schedules

- **3-** Click on the **User Access** tab.
- **4-** Select the needed Permission Group (such as **Contractor/Vendor**) from the list on the right hand side of the screen.
- 5- Select the individual needing a project added or removed from their permissions.

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All Projects	3	Business Services (Full)
All Locations		Contract Manager (Full)
		<ul> <li>Contract/Vendor (Guest)</li> </ul>
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