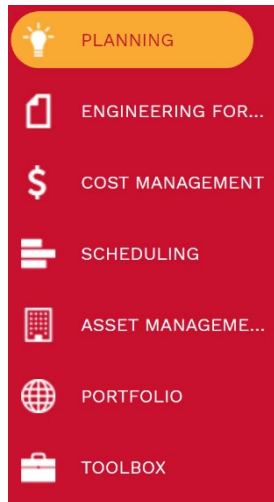




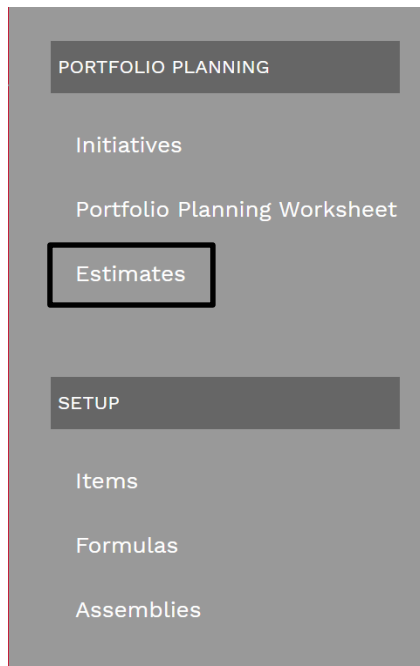
## **PMWeb**


### **Planning Estimating Steps**

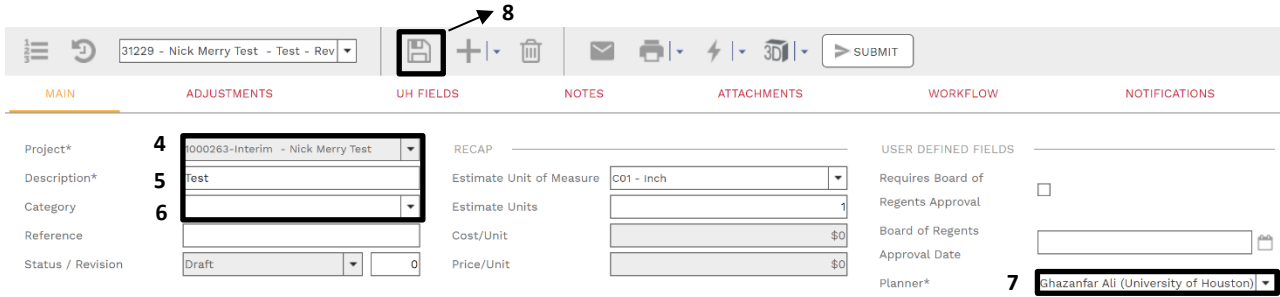
1- Click on **Planning** on the left panel.



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



- 3- Click on the  icon.
- 4- **Project Field** – Select the desired project.
- 5- **Description Field** – Type the description for the estimate.
- 6- **Category Field** – Select the desired Category.
- 7- **Planner Field** – Type the name of the Planner.
- 8- Click the **Save Button**.



31229 - Nick Merry Test - Test - Rev

MAIN ADJUSTMENTS UH FIELDS NOTES ATTACHMENTS WORKFLOW NOTIFICATIONS

Project\* 4 000263-Interim - Nick Merry Test

Description\* 5 Test

Category 6

Reference

Status / Revision Draft 0

RECAP

Estimate Unit of Measure CO1 - Inch

Estimate Units 1

Cost/Unit \$0



Price/Unit \$0

USER DEFINED FIELDS



Requires Board of Regents Approval

Board of Regents Approval Date

Planner\* 7 Shazanfar Ali (University of Houston)

- 9- In The Lower Tab click on the  button to add lines or the  button to edit.
- 10- **Description Field** – Type the description.
- 11- **Cost Code Field** – Type the Cost Code.
- 12- **Unit Cost Field** – Enter the Unit Cost.
- 13- **Ext Cost Field** – Auto Populates.
- 14- Click the **Save** button to update changes.

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

 Save  Cancel → 14

LINE #	ATTACHMEN	DESCRIPTION	COST CODE	COST CENTER 01	COST CENTER 02	UNIT COST	QUANTITY	EXT. COST
		10	11		12	\$0.00	1.00	13 \$0.00

15- In the top **Navigation Bar** click on the **Workflow tab**.

16- Click on the **Submit Button**.

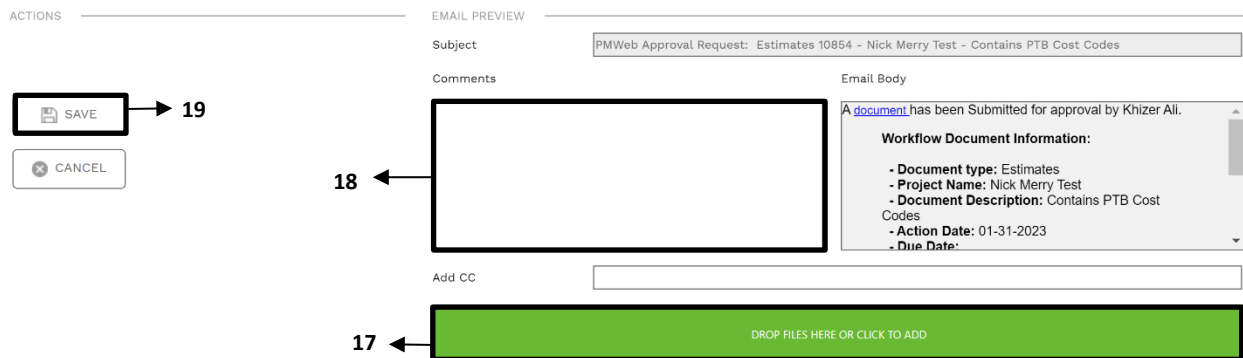


17- Drag and drop any documents for Approval.

18- In the **Comments box** type any comments related to the Attachment.

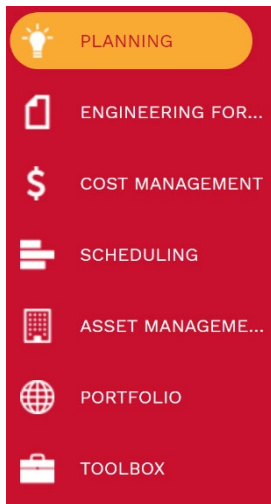
19- Click the **Save button**.

20- An **Estimator** review the attachment.

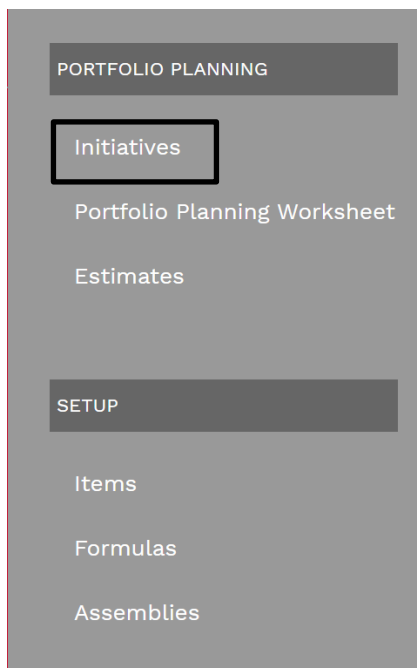


# Link to Initiative

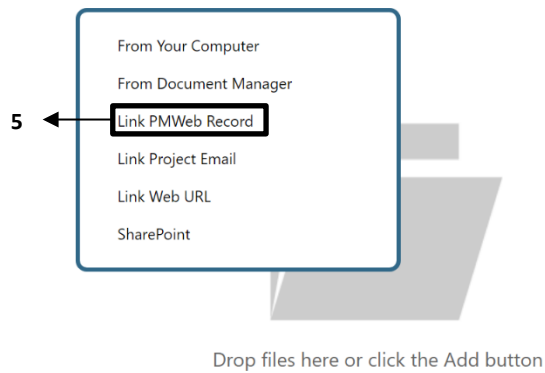
1- Click on **Planning**.



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



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



- 6- Expand **Planning**.
- 7- Expand **Estimate**.
- 8- Drag the desired estimate to the right.
- 9- Click the **Save and exit icon**.

