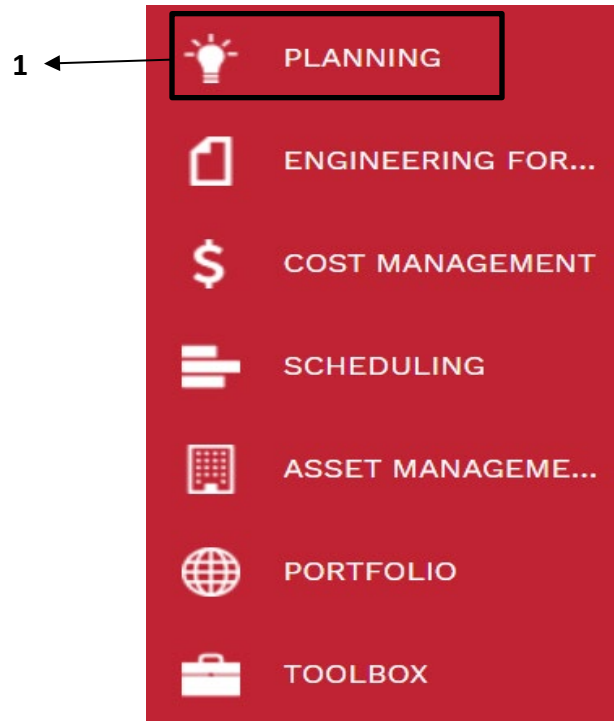




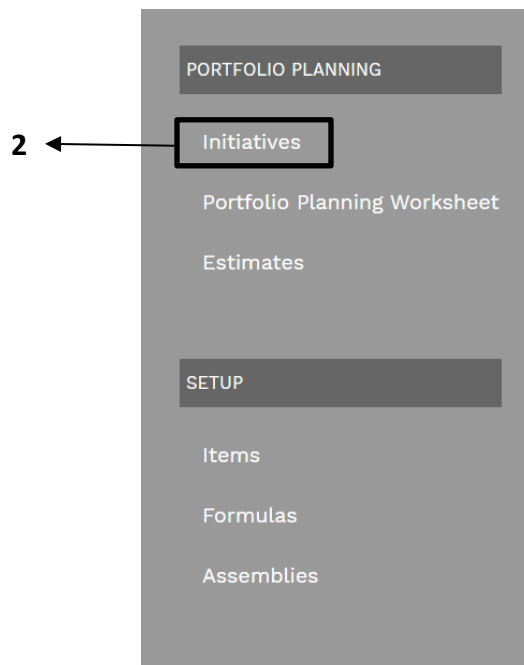
## **PMWeb**

### **Planning Initiative Steps**

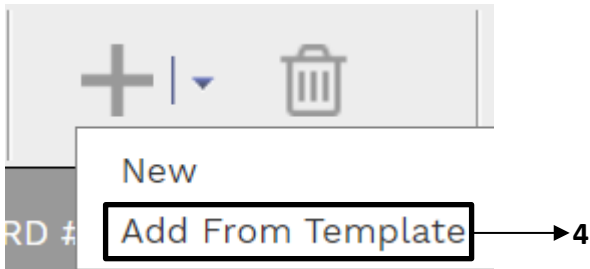
1- Click on the **Planning** on the left panel.



2- Click on **Initiatives**.



- 3- Click on the drop-down arrow next to the **ADD** button.
- 4- Select **Add from Template** and pick a template.



- 5- **Initiative ID field** – Auto populates.
- 6- **Planning Start field** – Insert the start date.
- 7- **Planner field** – Type the planner’s name.
- 8- Populate remaining fields in the header.
- 9- Click on the **Save Button**.
- 10- **Review All Field.**

**9**

The screenshot shows the software interface with the 'ADD' button highlighted by a red box and an arrow labeled '9'. Below the button is a form with various fields. The 'Initiative ID\*' field contains '000005' and is annotated with a red '5'. The 'Planning Start' field contains a date and is annotated with a red '6'. The 'Planner\*' field contains a name and is annotated with a red '7'. The 'Save' button is also visible in the top toolbar.

Field	Value	Annotation
Initiative ID*	000005	5
Name*	UHD Wellness & Success Center(1)	
Program	003 - FPC - Component Campuses	
Facility Type		
Project Type		
Reference		
Plan		
Status/Revision	Draft 0	
Location		
Request ID		
Currency	USD - Dollars (USA)	
Funding Year		
Priority		
Planning Start		6
Planning Finish		
Project Manager		
TOTALS		
Ext. Cost	\$0.00	
Adjustments	\$0.00	
Total Cost	\$0.00	
Weighted Score	0	
USER DEFINED FIELDS		
Work Order		
Requires Board of Regents Approval	<input type="checkbox"/>	
Board of Regents Approval Date		
Planner*		7
Project Customer		
Division or College		
Client DBA		
FPC Inspector		
Executive Director		

11- In the lower bar click on **+Add**.





12- **Cost Code field** – Select a cost code.

13- **Unit Cost** – Type in the Unit Cost.

14- **EXT. Cost field** – Auto populates, add period, description as needed.

15- Click on the **Save icon**.

15 ←  

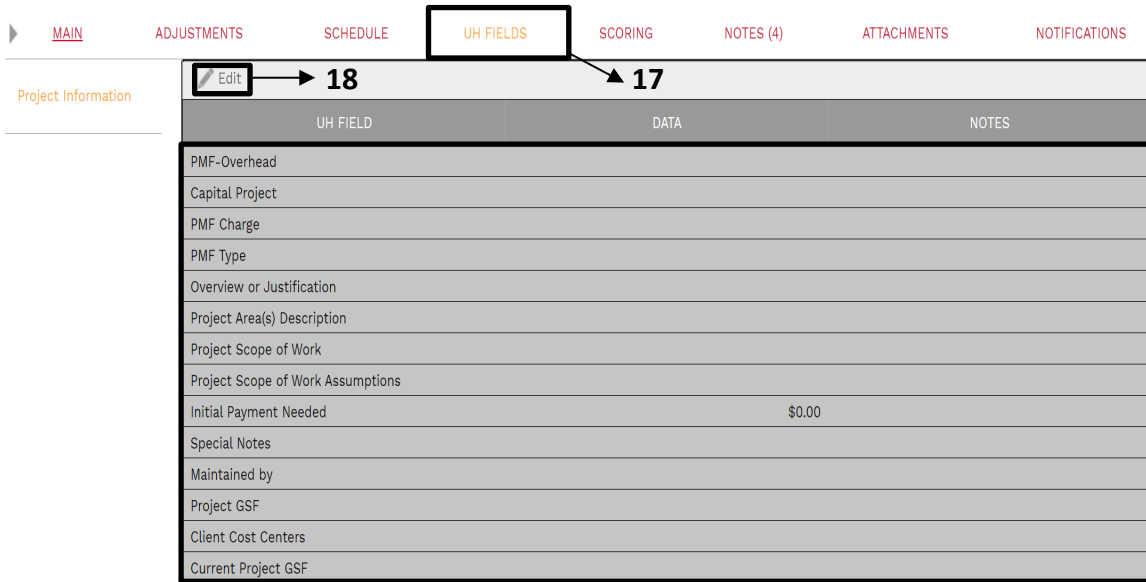
Drag a column header and drop it here to group by that column

LINE #	ATTACHMEN	YEAR	COST CODE	UNIT COST	EXT. COST	PERIOD	DESCRIPTION	QUANTITY	EX
				\$0.00	\$0.00			1.00	

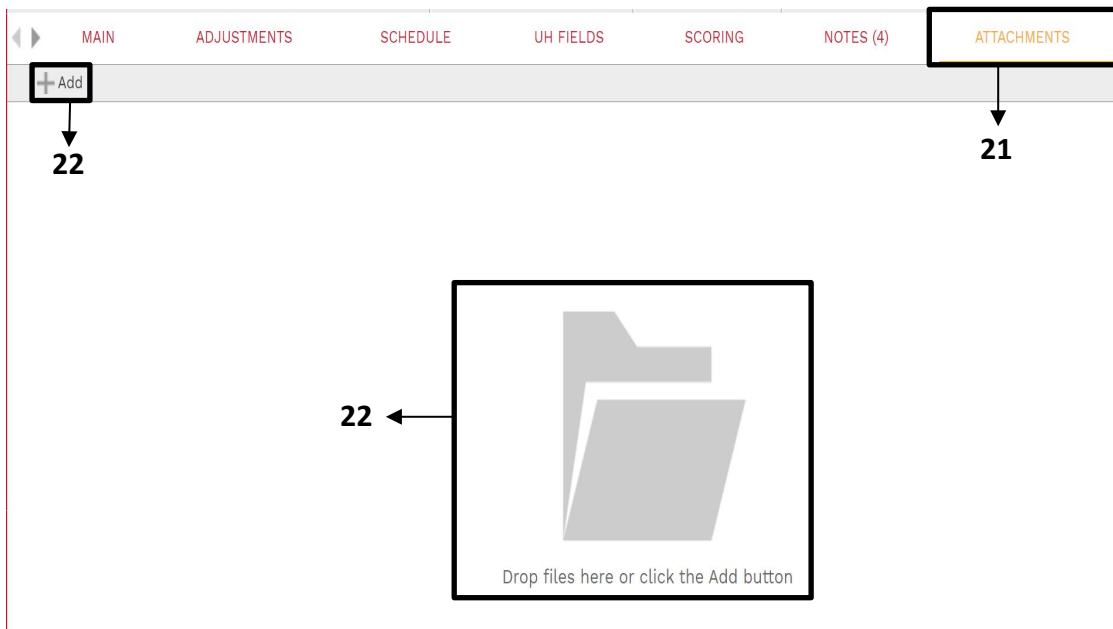
No records to display.

12                      13                      14

- 16- Note:** If your customer is not listed email Ali, Ghazanfar.
- 17- Click on the UH Fields tab** on the top navigation bar.
- 18- Highlight all the fields holding shift** and click on **the Edit button**.
- 19- Add project information** accordingly.
- 20- Note:** The information in these fields will be used for PFA Generation.

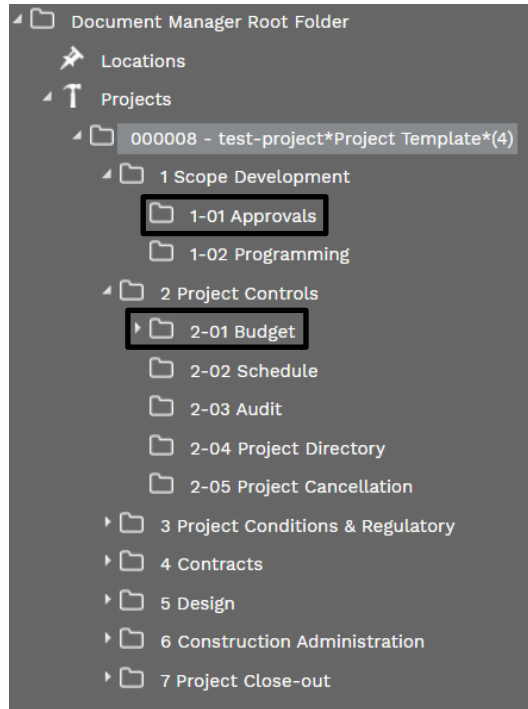


- 21- Click on the Attachments tab** at the top navigation bar.
- 22- Drag and drop the file you want to upload** or click the **+Add button**.

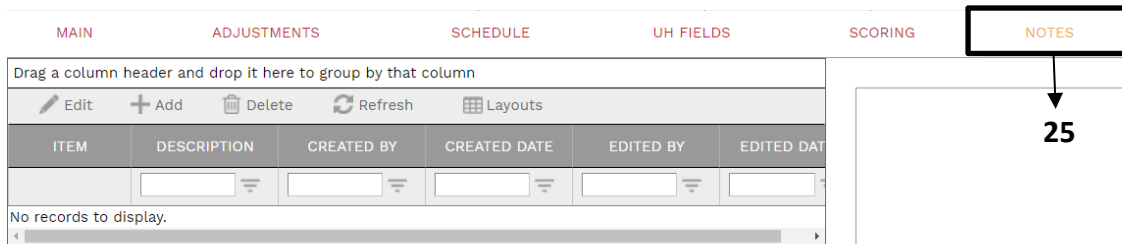


**23-** After clicking on **+Add** select **Document Manager**.

**24-** Navigate to **1-01 Approvals** and **2-01 Budget** to upload the files.



**25-** Select the **Notes tab** in the top navigation bar to add any notes.



**26-** Click on the **Main** tab in the top navigation bar.

**27- Status/Revision field** – Change from **draft** to **Approved**.

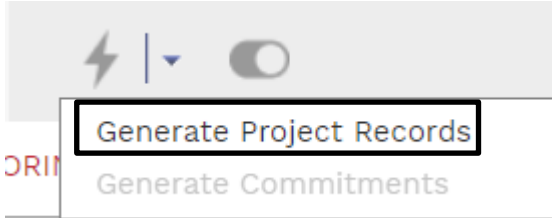
**28-** Click the **Save Icon** in the top bar.



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Initiative ID*	<input type="text" value="000011"/>
Name*	<input type="text"/>
<u>Program</u>	<input type="text"/> ▼
Facility Type	<input type="text"/> ▼
Project Type	<input type="text"/> ▼
Reference	<input type="text"/>
<u>Plan</u>	<input type="text"/>
Status/Revision	<input type="text" value="Draft"/> ▼ <input type="text" value="0"/> → <b>27</b>
<u>Location</u>	<input type="text"/> ▼
<u>Request ID</u>	<input type="text"/>
Currency	⋮ <input type="text" value="USD - Dollars (USA)"/> ▼
Funding Year	<input type="text" value="2023"/> ▼
Priority	<input type="text" value="01 - Emergency"/> ▼

29- In the top bar click on the **generate button** drop down, and select **Generate Project Records**.



30- On the pop-up screen make sure **Fund the budget** and **Budget** boxes are checked.  
31- Click on the **Check mark** on the top left.

GENERATE PROJECT RECORDS

31

Initiative ID	<input type="text" value="000009"/>	GENERATE	<input type="text"/>
Name	<input type="text" value="ZZ_*Project Template*(4)"/>	Project	<input checked="" type="checkbox"/>
Funding Year	<input type="text" value="2022"/>	Funding	<input type="checkbox"/>
Funding Source	<input type="text"/>	Fund Portfolio, Not the Project	<input type="checkbox"/>
Initiative Total	<input type="text" value="\$5,000.00"/>	Fund the Budget	<input checked="" type="checkbox"/>
		Budget	<input checked="" type="checkbox"/>

↓  
30

32- Proceed to Project Records for next steps.