

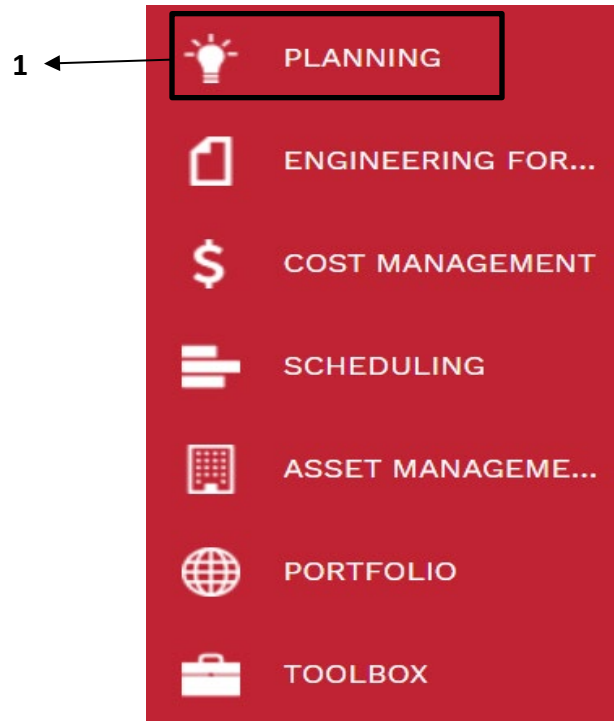


PMWeb

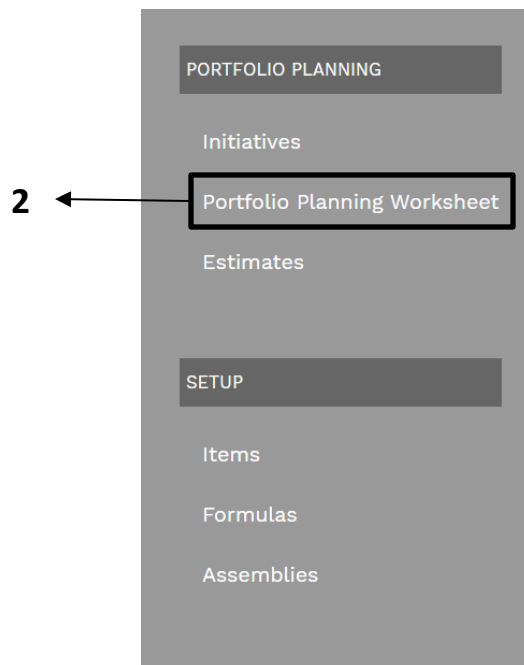
Portfolio Planning Worksheet

Steps

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



2- Click on **Portfolio Planning Worksheet** under **Portfolio Planning**.



3- Click on the **+Add** button in the top bar.



4- **Plan Year field** – Type in the plan fiscal year.

5- **Program field** – Select Portfolio.

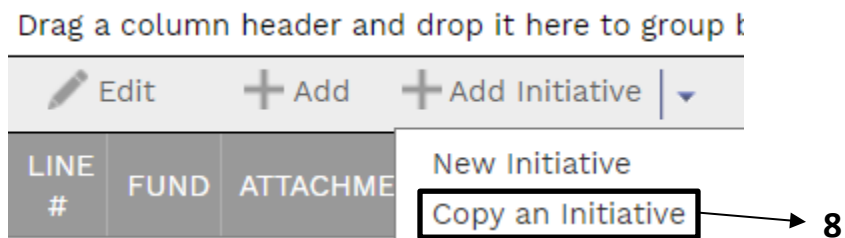
6- **Portfolio Name field**- Type in the Portfolio name, example FY24 MPEC Project List.

7- Click on the **Save** icon in the top bar.



Plan Year*	<input type="text" value="4"/> 2022
Program*	<input type="text" value="(Portfolio)"/> 5
Portfolio Name	<input type="text" value="6"/>
Currency	<input type="text" value="USD - Dollars (USA)"/>
Status / Revision	<input type="text" value="Draft"/> <input type="text" value="0"/>

8- In the lower bar, click on **Add Initiative drop-down** and select **Copy an Initiative**.



9- From the pop menu select an **Initiative**. For new initiatives, select (ZZ_*Project Template)

10- Click on the **Checkmark** on the top left.

11- Repeat as needed.

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RECORD #	PROJECT STATUS	WORKFLOW STATUS	PROGRAM	TYPE	CATEGORY	WBS	PBS	LOCATION	ADDRESS1	ADDRESS2	CLIENT
TEMP_PROJ_01		Draft									
CE-003	01 - Planning	Approved	FPC - 10M+	Athletic	Athletics			Athletics/Pci			University of Hou
S000056	02 - Design & Con	Approved	FPC - 10M+	Classroom, Medic	01 - New Constru			College of Medic			University of Hou
M001002	03 - Closeout	Approved	FPC - 1-10M		03 - Renovation			Campus Recreati			
M001197	04 - Closed	Approved	CCS	Laboratory, Gene	03 - Renovation			Coastal Center R			
M001156	02 - Design & Con	Draft	CCS	Other	03 - Renovation			C. Hilton College			
S000058	02 - Design & Con	Approved	FPC - 10M+	Classroom, Gene	03 - Renovation			Roy G. Cullen			
S000060	02 - Design & Con	Approved	FPC - 10M+	Classroom, Gene	03 - Renovation			Charles F. McElhi			
S000062	02 - Design & Con	Approved	FPC - 10M+	Laboratory, Medic	03 - Renovation			College of Pharm			
P001760	02 - Design & Con	Draft	FPC - Componen	Student Center	01 - New Constru			UH-Downtown			

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12- Linking existing Initiatives, select **Link Initiatives**. Select appropriate initiatives from the pop-up menu.

13- Click on the **Checkmark** on the top left.

14- **Process Complete.**