# 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.
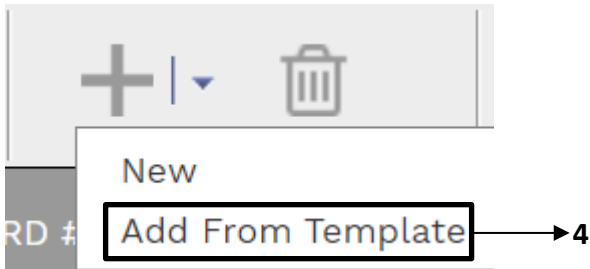
Reference: N/A

1- Click on the **Planning** on the left panel.
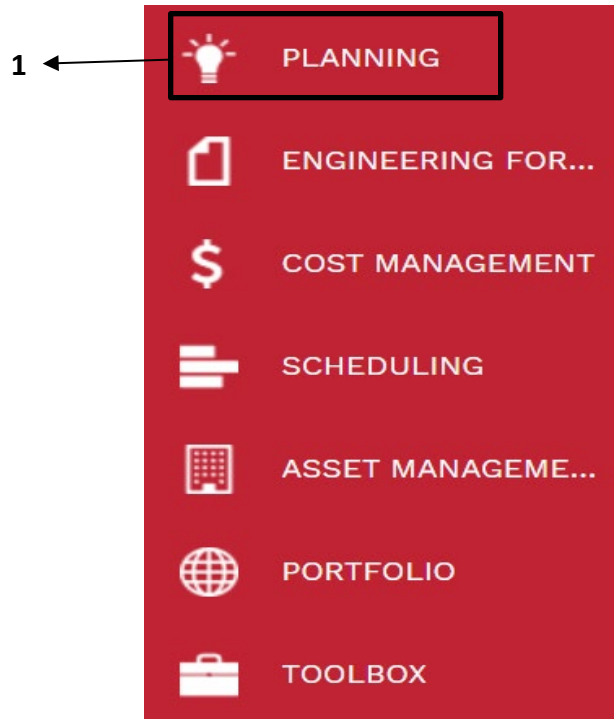
2- Click on **Initiatives.**
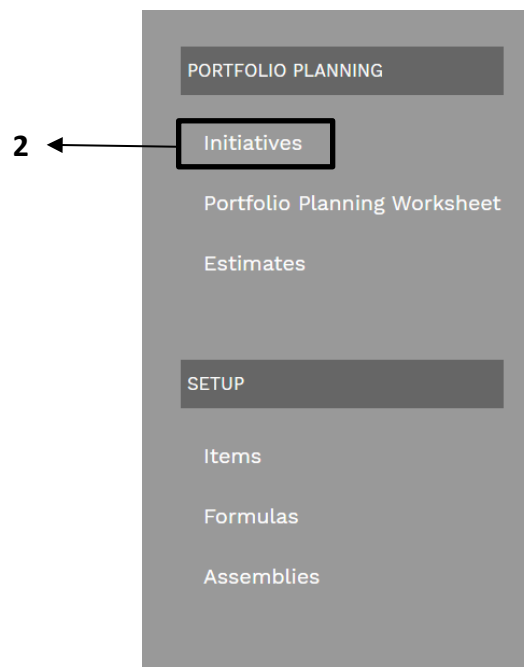
3- Click on the drop-down arrow next to the **ADD** button.

4- Select **Add from Template** and select **TEMP_PROJ_01**.

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.

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

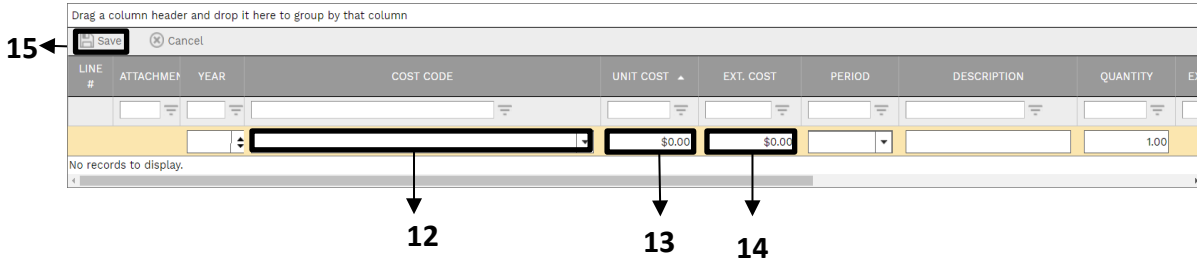**12- Cost Code field –** Select a cost code.
13- Unit Cost – Type in the Unit Cost.
14- EXT. Cost field – Auto populates, add period, description as needed.
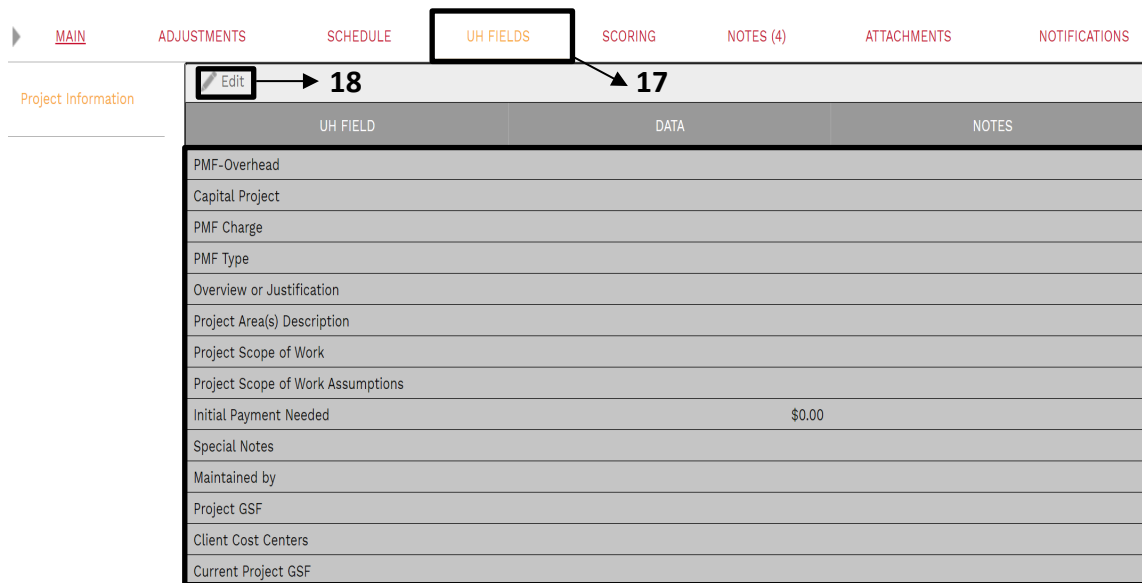**15-** Click on the **Save icon.**

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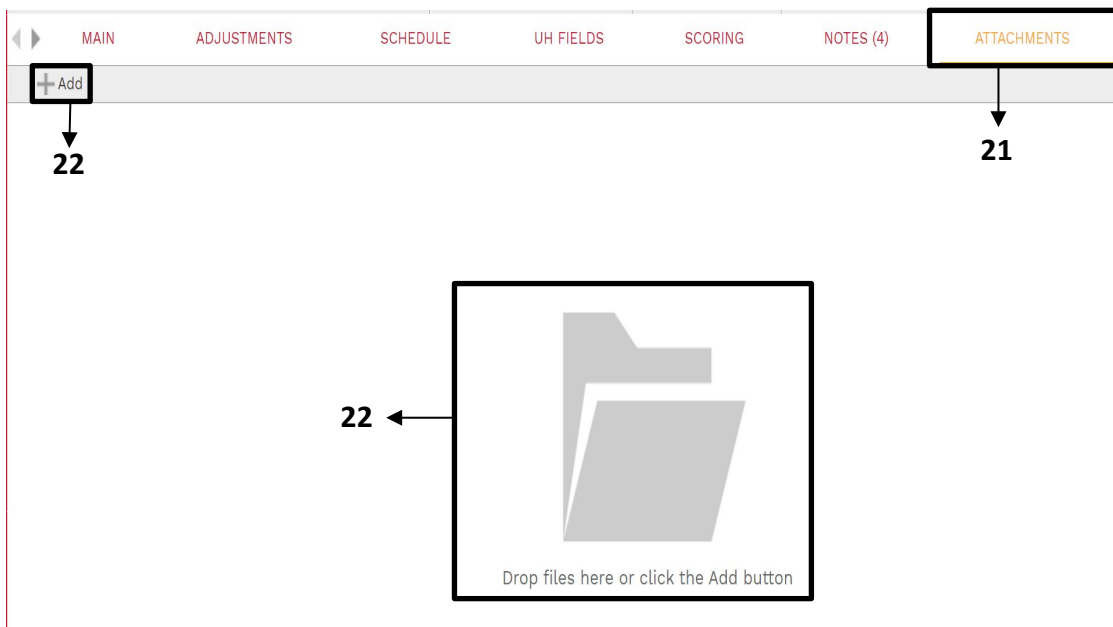**18-** Highlight all the fields holding shift and click on **the Edit button**.
19- Add project information accordingly.
20- Note: The information in these fields will be used for PFA Generation.

MAIN	ADJUSTMENTS	SCHEDULE	UH FIELDS	SCORING	NOTES (4)	ATTACHMENTS	NOTIFICATIONS

Project Information

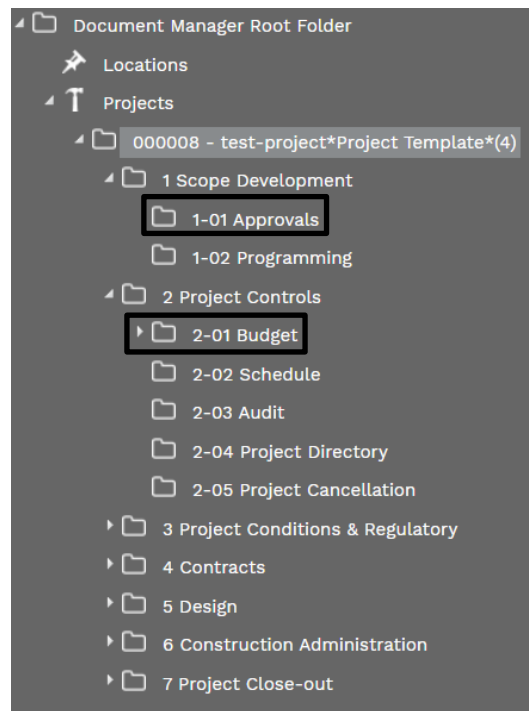| UH FIELD	DATA	NOTES
PMF-Overhead		
Capital Project		
PMF Charge		
PMF Type		
Overview or Justification		
Project Area(s) Description		
Project Scope of Work		
Project Scope of Work Assumptions		
Initial Payment Needed	$0.00	
Special Notes		
Maintained by		
Project GSF		
Client Cost Centers		
Current Project GSF		

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**.

| MAIN | ADJUSTMENTS | SCHEDULE | UH FIELDS | SCORING | NOTES (4) | ATTACHMENTS |

+Add

22

21

22 ←

Drop files here 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.

Document Manager Root Folder
- Locations
- Projects
  - 000008 - test-project*Project Template*(4)
    - 1 Scope Development
      - 1-01 Approvals
      - 1-02 Programming
    - 2 Project Controls
      - 2-01 Budget
      - 2-02 Schedule
      - 2-03 Audit
      - 2-04 Project Directory
      - 2-05 Project Cancellation
    - 3 Project Conditions & Regulatory
    - 4 Contracts
    - 5 Design
    - 6 Construction Administration
    - 7 Project Close-out

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

MAIN	ADJUSTMENTS	SCHEDULE	UH FIELDS	SCORING	NOTES

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 DAT

No records to display.

25

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.

➡ **28**

Initiative ID*	000011
Name*	
Program	▼
Facility Type	▼
Project Type	▼
Reference	
Plan	
Status/Revision	Draft ▼ 0
Location	▼
Request ID	
Currency	⋯ USD – Dollars (USA) ▼
Funding Year	2023 ▲▼
Priority	01 – Emergency ▼

➡ **27**

29- In the top bar click on the **generate button** drop down and select **Generate Project Records.**
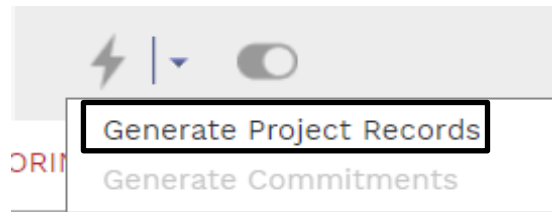
30- On the pop-up screen make sure **Fund the budget** and **Budget** boxes are checked.
31- Click on the **Check mark** on the top left.

GENERATE PROJECT RECORDS

31 ✔ ⊗

Initiative ID	000009	GENERATE	
Name	ZZ_*Project Template*(4)	Project	☑
Funding Year	2022	Funding	☐
Funding Source		Fund Portfolio, Not the Project	☐
Initiative Total	$5,000.00	Fund the Budget	☑
		Budget	☑

30

32- On the **Main** tab Click on **Project** under the Weighted Score under Totals.

32 TOTALS

Ext. Cost	$0.00
Adjustments	$0.00
Total Cost	$0.00
Weighted Score	0
Project	1000688 - TESTba

33- Populate all drop-down fields on the **Main** Tab, if applicable.
34- Status field – Change from **draft** to **Approved.**
35- Project Start field – Insert the start date.
36- Project Finish field – Insert the finish date.
37- Click on the **Save Button**.

38- Process complete.