

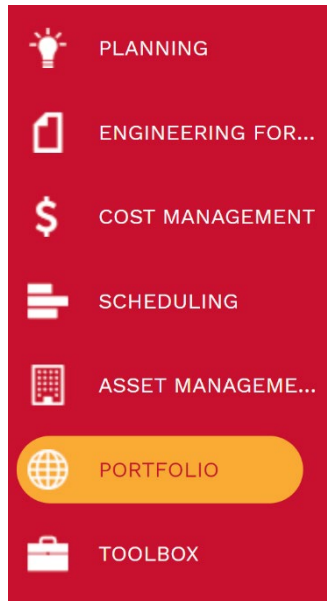
# PM

## Assigning Roles

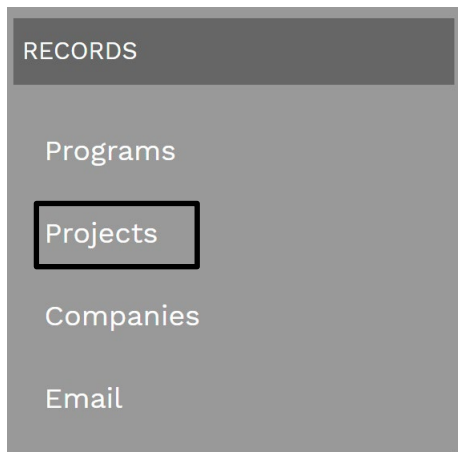
**Overview:** Many roles within PM Web have default users assigned as the same individual is int that role regardless of project. However, there are several that vary per project such as PM, Inspector, contractor, and others. The PM is responsible for assigning the project specific roles and keeping them updated.

**Reference:** n/a

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



2- Under **Records**, select **Projects**



- 3- Select the **project** from the list provided.
- 4- Click on **“USERS”** tab at the top navigation bar.
- 5- Under **‘WORKFLOW ROLES’**, select the user from the list provided and drag name over to specific named role in the Role Box directly to the right of **‘WORKFLOW ROLES’**.
- 6- Repeat for additional users.
- 7- Click on **“Save”** icon in the top bar of window.

The screenshot shows a software interface with a top navigation bar containing tabs for 'USERS', 'COMPANIES', 'CONTACTS', 'NOTES (5)', and 'ATTACHMENTS'. The 'USERS' tab is active. Below the navigation bar, there is a section titled 'WORKFLOW ROLES'. On the left side of this section, there is a list of users with 'Nick Merry (NickM)' highlighted in yellow. On the right side, there is a table with columns 'LOCKE', 'LEVEL', 'ROLE\*', and 'USER\*'. The 'Project Manager' role is highlighted in yellow in the table, and 'Nick Merry(NickM)' is listed as the user for that role. There are also two checkboxes: 'View Unlocked Roles Only' and 'View Roles in Use Only', both of which are unchecked.

LOCKE	LEVEL	ROLE*	USER*
<input type="checkbox"/>	System	Planning - Engineering 1	Jai Ranganath(jrangana)
<input type="checkbox"/>	System	Planning - Engineering 2	Andrew Nguyen(hvnguy37)
<input type="checkbox"/>	System	Planning - Engineering 3	admin (admin)
<input type="checkbox"/>	System	Planning - FF&E	Connie Hammack(chammack)
<input type="checkbox"/>	System	Planning - FF&E Review	admin (admin)
<input type="checkbox"/>	System	Planning - Project Planner	Jennifer McPhail(jmcphail)
<input type="checkbox"/>	System	Planning - Space Manager	Woody Sutton(WoodyS)
<input type="checkbox"/>	System	Planning - Sr. Planner for PFA	Brittanee Adams(BrittaneeA)
<input type="checkbox"/>	System	Plumbing	Esteban Mendoza(emendoz4)
<input type="checkbox"/>	System	PPM or Director	Nick Merry(NickM)
<input type="checkbox"/>	System	Project Manager	Nick Merry(NickM)
<input type="checkbox"/>	System	Provost	admin (admin)
<input type="checkbox"/>	System	Security 1	Charles Way(cway)
<input type="checkbox"/>	System	Solid Waste	Deborah Thoms(dthoms2)

8- Process Complete.