PMWeb User Guide (DRAFT)

Working Draft (January 2019)
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PMWeb Login and Landing Page

PMWeb Login Page

For Boston University (BU) employees, you will need to log into PMWeb using your Kerberos username and password.

1. Navigate to the URL: https://bu.pmweb.com/PMWeb
2. You will see a standard Boston University login screen

![BU Login](image)

3. Enter your BU username and password
4. Click the “Continue” button.

**Note:** PMWeb has a timeout feature on the site. If you have not SAVED any information on PMWeb in for two (2) hours, the system will automatically log you out, though you will not notice this until you try and click on something. Any changes made since the last save will be lost.

**Note:** Once you have been auto-logged out you will be returned to the default PMWeb login page, to return to the Kerberos page, simply refresh your browser window.

5. You will arrive at the Project Request Dashboard view.
Note: From this page you can see all of the Project Requests that you have entered, as well as their Status in the system. You can also enter a new Project Request by clicking the “Create Project Request” link.
PMWeb Basics

PMWeb is made up of multiple modules, each with individual tools that will be explained in the sections of the User Guide. The basic instructions below apply to all of the modules, and will help you with general navigation of the site.

Selecting and Editing Fields

In order to modify any of the lists of fields in the various modules throughout PMWeb, you must first select the lines that you wish to modify. Selecting these lines can be done in several ways.

Clicking and Editing
(Recommended for editing individual fields)

1. Click the line that you wish to edit.

2. Click the Edit button at the top of the list to begin editing the line.

3. The line will turn orange and the data fields can now be edited.

4. Enter your changes into the line.

5. Click the Update Records button once you are complete.

Double-Clicking
(Recommended for editing Individual Fields)
1. Double click the line that you wish to edit.
2. Enter your changes into the line.
3. Click the Update Records button once you are complete.

**Shift/Control-Clicking**
(Recommended for editing multiple fields at once)
1. Click the first line that you want to edit.
2. Either:
   a. Hold shift and click the last in the set of lines that you want to edit.
   b. Hold control and click each line that you want to edit.
3. Click the Edit button, and enter your changes into the line.
4. Click the Update Records button once you are complete.

**Drag-Selecting**
(Recommended for editing multiple fields at once)
1. Left click and drag your mouse over the whole section of lines that you wish to select, and then release the mouse button. (You will see a grey box over the lines you have selected)
2. Click the Edit button, and enter your changes into the line.
3. Enter your changes into the line.

Click the Update Records button once you are complete.

**Sorting, Filtering and Grouping Tables**
Every Table and List in PMWeb can be easily sorted, filtered and grouped by any of the columns of that table.

**Sorting/Filtering Tables**

**Sorting** – To sort by any column in PMWeb click the name at the top of the column, and the column will sort alphabetically. To sort by reverse alphabetical order, click the name again and the order will reverse.

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Record #</th>
<th>Project Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amedio Training</td>
<td>10000024</td>
<td></td>
</tr>
<tr>
<td>Ashford Office</td>
<td>10000031</td>
<td></td>
</tr>
<tr>
<td>Barton Training</td>
<td>10000014</td>
<td></td>
</tr>
<tr>
<td>Broderick Training</td>
<td>10000023</td>
<td></td>
</tr>
<tr>
<td>Facilities Test</td>
<td>10000016</td>
<td>Active</td>
</tr>
<tr>
<td>Fans Training</td>
<td>10000012</td>
<td></td>
</tr>
<tr>
<td>Gaudet Training</td>
<td>10000013</td>
<td></td>
</tr>
</tbody>
</table>

*Projects sorted alphabetically by column name.*
**Filtering** – You can filter by any column in PMWeb by first clicking the icon just below the name of any column, and then clicking your filtering method, for example Contains, Does Not Contain, or Equal To.

Once the filtering method has been selected, enter the criteria you want to filter on into the box, and press enter. The List will then update filtered by the criteria you chose.

**Grouping Tables in PMWeb**

1. Follow these steps to Group the Tables in PMWeb.
2. Click and drag the header of the column, the name at the top, which you want to group your table by up to the white bar at the top of the table, where it says “Drag a column header and drop it here to group by that column.”
3. Once you have dragged the header to the bar, the system will automatically group the table by that column. If you want to undo the grouping you can then drag the column name back off the grouping bar and it will reset.

**Note:** You can group by multiple columns at once, and they will be grouped in the order of columns that you chose.

![List of Estimates in PMWeb grouped by Estimate Status.](image)

**Creating and Saving a Custom Table Layout in PMWeb**

Once you have sorted and filtered a table, you can then save that setup as a Layout in PMWeb, by clicking the “Layouts” button on the top of the table.

![Creating and Saving a Custom Table Layout in PMWeb](image)

**Using the Document Manager and Attaching to Records in PMWeb**

PMWeb’s Document Manager tool acts as a central repository for all non-CAD Documents for each Project. The Document Manager allows easy sharing of documents amongst the entire Project Team.

The template Projects in PMWeb have a folder structure that is passed down to all Projects created using those templates. This allows for a consistent folder structure and ease of locating any Documents.
While it is possible to attach documents directly to records in PMWeb, it is recommended to instead upload documents to the Document Manager. This allows for ease of searching and accessing of all documents attached during the Project Lifecycle.

**Uploading to the Document Manager**

1. In the Main Menu navigate to Engineering Forms/Document Manager. Scroll through the list of Projects to locate the Project you are working on.
2. Click the Plus Icon next to the Project to expand the folder.
3. In the main folder view you will see a folder for the level of your Project. This folder holds the default folders for that particular project level.
4. Click on the Plus Icon next to the level folder.
5. In the folder structure that opens, click the plus icon next to the correct folder for your document.
6. Click the folder where you want to upload your document.
7. Once you have selected a folder that you want to upload your document to, there are two ways of uploading the document.
   a. **Drag-and-Drop**
      1) Locate the file on your computer.
      2) Click-and-drag the file to the “Drop Files Here to Upload” green box.
      Note: You will know you have dragged correctly when your cursor turns into an expanded version of the file icon.
   b. **Browse and Upload**
      1) Click the “Or Browse to Upload” button.
      2) In the window that opens navigate to your file and click “Open”
8. Once a file has been uploaded to PMWeb it will appear in the list above the green upload box.
9. There are several options available for files that have been uploaded to PMWeb, accessible by clicking on the file you wish to modify, and the “File Actions” button.
   a. **Copy** – You can copy the file and paste it into a new folder in PMWeb.
   b. **Check Out/In** – Files can be checked out, indicated by a green checkmark to the left of the document number. This means that the document is being edited by someone, and no one else should modify that document until it is checked back in.
   c. **PMWeb Viewer** – If the folder is a type that PMWeb can read, it can be opened in PMWeb viewer to read or modify.
   d. **Delete** – Delete the file that you have currently selected.
10. Once a document has been uploaded to the Document Manager it can then be attached to any record within PMWeb.
11. **Note:** By default users can see all Document Folders for the Projects that they have access to. To select certain projects:
   a. Click on the “Configure Tree” button at the top of the folder list.
   b. Uncheck the box next to All.
   c. Click the Plus Icon next to “All Projects”.
   d. Click the Plus Icon next your Org Unit.
   e. Click the Check Box next to the Project you wish to view.
   f. Once you have selected all the Projects you wish to view, click the “Save” button at the top to save your view.

**Note:** To undo this selection, click on the “Configure Tree” button again, then click the check-box next to “All,” and Save. This will revert your view back to all Org Units, Projects, and Locations that you have access.

**Workflow Inbox and Actions**

Project Requests and Budget Requests are both approved through Workflow processes in PMWeb. Project Requests are submitted by anyone with the appropriate access to PMWeb, while Budget Requests are only submitted by the Project Manager on the Project. The actions for approving, rejecting or requesting more information on either type of request have similar configurations in PMWeb.

**Completing a Workflow Action**

1. The workflow inbox can be found on the Home Page’s Controls Tab. To see a list of all workflow requests click this link.
12. Click on the blue Document ID link to open the Workflow functionality.

13. The record will open with the Workflow tab selected.

Note: To review the information being submitted click on the “Details” tab.

14. On the left side of the tab you will see a list of options.

   a. **Approve Request** – Approve the workflow and send it to the next step.

   b. **Return Request** – Return the workflow for comment.

   Note: This does not stop the workflow progress, but simply returns it back to the previous approver or submitter.

   c. **Reject** – Reject the request completely.
**Note:** This option completely closes out the Workflow, and locks the record for editing. In order for a Rejected request to be re-submitted a new, duplicate, record must be created and re-submitted.

d. **Withdraw** – Back the record out of Workflow. The submitter can edit and re-submit the record for approval.

e. **Final Approval** – This option is only available if you are the last step in the Workflow. This option closes out the entire Workflow and sets the status of the record to “Approved.”

f. **Comment** – Add a comment to the record.

g. **Team Input** – The blue team input link will allow you to send the request to another member of the project team for their input.

**Note:** Team input does not allow the person to approve the workflow, only comment on it, and send it back to you for approval/rejection.

15. Once you have selected an option a preview of the email that PMWeb will send to the next person in the Workflow will be visible. Next to this is a comments section where you can enter any comments for the next approver to read.

**Note:** You can see where the Workflow is in the process in the “Business Process” and “Workflow Log” tables below the Workflow actions.

16. The “Business Process” table shows you the full workflow, including who the Users are at each step and what their role in the Workflow is.

The “Workflow Log” table shows you what Users have acted on the Workflow up until that point, as well as what their Actions on the Workflows were.
17. Once you have made your selection and entered any comments hit the Save button at the bottom of the selection to execute your action on the workflow process.
Creating Project Requests and Submitting to Workflow

The Project Requests interface in PMWeb is how you submit potential projects for review by the appropriate entities and obtain assignment of team resources. Project Requests can be entered by anyone in the system, but must go through workflow before they can be assigned and activated as a Project. This section of the guide will show you the process for creating a Project Request, and submitting it for review.

Steps

1. In the Main Menu click on the Portfolio Module.

2. Click on Project Requests.

3. The Project Requests Manager page opens.

4. In the toolbar click the Add button.

5. An empty Project Requests record opens. The Contact information displayed is based on your login information (phone numbers will be added in a subsequent phase).
6. In the Scope section enter a general overview of the work that you wish to have done, and the areas that will be impacted to provide context of the request and why it is needed.

7. In the Location drop down select the street address of the building that you would like the work to be done in. This list contains every building on campus and can be searched by entering either the street name, number or building number by starting to type in the field. (If you don’t know the address or the project will occur at multiple buildings, select 0 Charles River Campus, 0 Medical Campus, or 0 Fenway Campus.)

8. The Record # field is greyed out and will be auto-populated by the system.

9. In the Category List select the Level of the Project.

   **Note:** This field is not visible to individuals in the End User System Role.

   **Note:** Emergency projects should only be selected by Facilities Staff.

10. In the Type field select the type of project. (Academic, Non-Academic or Infrastructure.)

11. In the Description field type a brief, informative description for the project, ex: “Office paint and carpet”.

   **Note:** Once assigned to a PM, the project name will be updated to fit a specific naming convention with the following components:

   a. 6-Character Street Location
   b. Three-Word Description
   c. For Example a Project Happening in 2019 at 120 Ashford would appear as:

      “120ASH Conference Room Update – 2019”

12. In the toolbar click the Save button.

   **Note:** The header must be filled out and saved in order for the Required Fields to be editable.
Note: If you are going through the Project Request Dashboard the Save button submits the Project Request to Workflow, so all Required Fields must be filled out.

13. In the tabs below the header you will find a tab that says Required Fields. These fields provide additional information to requested scope and requirements. To edit these fields:
   a. Click the first line.
   b. Hold Shift and click the last line
   c. Click the “Edit” button.

<table>
<thead>
<tr>
<th>Required Fields</th>
<th>Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>spec</td>
<td></td>
</tr>
<tr>
<td>What would be the ideal construction start date</td>
<td></td>
</tr>
<tr>
<td>What is your anticipated funding source</td>
<td></td>
</tr>
<tr>
<td>What is your anticipated cost object</td>
<td></td>
</tr>
<tr>
<td>Is this related to a faculty new hire</td>
<td></td>
</tr>
<tr>
<td>If yes, what is the position number</td>
<td></td>
</tr>
<tr>
<td>What is the requesting unit</td>
<td></td>
</tr>
<tr>
<td>Are you looking for additional space or square feet</td>
<td></td>
</tr>
<tr>
<td>If yes, how much additional space are you asking for</td>
<td></td>
</tr>
<tr>
<td>Will you require Design Assistance</td>
<td></td>
</tr>
<tr>
<td>Do you plan to implement this project once approved</td>
<td></td>
</tr>
<tr>
<td>Does the Scope of the renovation include any of the following</td>
<td></td>
</tr>
<tr>
<td>Demolition</td>
<td></td>
</tr>
<tr>
<td>Systems furniture or work station</td>
<td></td>
</tr>
<tr>
<td>Heating Ventilation &amp; C.</td>
<td></td>
</tr>
<tr>
<td>Noise or building code</td>
<td></td>
</tr>
</tbody>
</table>

14. In the Data column enter in the requested information.
   a. **What would be the ideal construction start date** – The date the space(s) is available for construction to commence
   b. **What is your anticipated funding source** – The cost object for project funding
   c. **What is your anticipated cost object** – the cost object of the anticipated funding source.
   d. **Is this related to a faculty new hire (yes or no)** – If this is a new hire project click yes, else no.
   e. **If yes, what is the position number** – If this is a faculty new hire project, enter the position number
   f. **What is the requested unit** – Select your department/unit
   g. **Are you looking for additional space or square feet** – If you are seeking to expand the size of your space click yes, else no.
   h. **If yes, how much additional space are you looking for** – If you answered yes to the above question, give an estimate of the number of square feet you wish to add, if known.
   i. **Will you require design assistance** – Will you need support (internal or external) such as an interior designer or architect?
j. Do you plan to implement this Project once it is approved –

k. Will you require any of the following

1) Demolition – Will your project require the removal of walls, ceilings, floors, etc.

2) Systems Furniture or Work Stations – Will you need any new cubicles or work stations?

3) Heating, ventilation, AC – Will your project modify any heating, ventilation or air conditioning equipment?

4) Walls to be moved or built? – Will your project require any walls to be either moved or created?

15. Click the “Update Records” button.

16. Click on the “Scope” tab.

17. Open the fields for editing and click the check-box next to any types of work that you believe your project will require.

18. Click the Update Records button

19. Click the Submit button in the upper right of the page.

20. The Project Request is submitted to Workflow.

21. Note: The fields in the Project Request will be locked once the request has been submitted unless you withdraw it.

Navigating the Project Lifecycle

Once a Project Request or Initiative has been assigned for Planning, Design and Estimating it is assigned to a Project Manager to begin the Project Lifecycle. PMWeb will store the estimates, budget, designs and documents for all projects.
Reviewing a Project

1. Use the menu to navigate to Portfolio > Lists > Projects.

![Figure 1 - Portfolio > Lists > Projects](image)

22. The Projects Manager page opens.

23. Click on the blue record number to open the Project Record.

24. The Program is the University academic or business unit of the project client. This also controls security access and workflows for the project.
25. The **Project ID** field auto-populates with the next ascending value, and cannot be modified by the user.

26. The **Project Name** conforms to a specific standard to make searching and identifying specific projects much easier for the whole team.

   The project name consists of several pieces of information separated by underscores:
   
   a. 6-Character Street Location
   b. Three-Word Description
   c. For Example a Project Happening in 2019 at 120 Ashford would appear as:
      
      “120ASH Conference Room Update – 2019”

27. The **Project Status** has one of three options
   
   a. Active – Project is being actively worked on.
   b. Closed – Project has been completed and closed.
   c. Hold – Project is on hold.

28. The **Project Type** and **Category** fields help structure PMWeb views and reports so that similar projects can be grouped together.

29. **PBS** holds the name of the Project Manager for Reporting and Sorting Purposes

30. The **Placeholder Budget** field holds the estimated from the University Capital Plan or other source.

31. **Target Duration and UOM (Unit of Measure)** shows the approximate time the project should take based on Scope and Level.

32. **Target Start**, is the commence date of the project beginning with planning then design then implementation.

33. **Target Finish**, is the targeted completion date of the project.

34. The **Original Scope** field holds the initial scope of the project. This scope remains the same throughout the project lifecycle. Current Scope is documented under the Specification tab in the Current Scope tab.

35. The **Request ID** field will be auto-populated if the project was created through a Project Request or Initiative.

36. The **Project Phase** dropdown shows the current phase that the project is in.

37. Once any changes have been made in the toolbar click the Save button.
Projects Record

38. The Details tab shows the SAP Account number for the Project.

39. Click on the Specifications tab.

These values can be changed by anyone with the correct security access by highlighting the line or lines that you want to change and clicking the Edit button.

a. The Core Team tab holds the names of the BU employees in the core roles of the project.

b. The Internal Stakeholders are BU employees who are outside the core team but still involved with the project.

c. The External Stakeholders are people or organizations outside of BU that are involved with the project.

d. The Project Level tab holds the level of the project.

e. The Current Scope tab holds the updated scope of the project, for the SPACE form and to be compared to the Original Scope.

f. In the SPACE Fields tab the checkmark on the SPACE row specifies if a project is to be included on the SPACE report.

40. The Users tab gives the Project Manager the ability to add specific users to the project who do not already have access.

Note: By default users can only view those projects that are in their Academic or Business unit.

41. The Notes tab allows users to add project notes. These can be ordered and filtered by Creator, Creation Date, Description or Edit Date.

42. The Attachments tab allows users to attach specific documents to a Project. While documents can be attached directly to a Project, it is recommended that you add the documents to the Document Manager folder for the project, then link them to here.
PMWeb Scheduling

PMWeb Scheduling allows you to track the project schedule including milestones and critical path items. Schedules can be rolled up over all your Portfolios, Programs or Projects to see all your schedules from start to finish.

Accessing the Schedule Module

1. Navigate to Scheduling/Scheduling/Schedules on the Main Menu.
2. The Schedule List will Open

   **Full Schedule List in PMWeb**

3. Click on the blue record link to open the schedule for your Project.

   **Schedule Module in PMWeb**
Reading the Gantt Chart

The visual format of an element in the PMWeb Gantt chart signifies the type and/or status of the element. It is important to understand what each format means to correctly interpret the schedule.

Task Bars

- A task not on the critical path which is 0% complete
- A task not on the critical path which is 30% complete
- A task which is 100% complete
- A task on the critical path which is 0% complete
- A task on the critical path which is 80% complete
- A locked task. Notice the heavy left and right edge borders.
- A disabled task. External tasks - those from other PMWeb schedules - are always disabled.

Milestones

A milestone has a date but no duration. Milestones can be created two ways:

By right clicking on the Gantt chart and adding a milestone to an existing task line.

Milestones created using this method are referred to as "regular" milestones. One task line can contain many regular milestones. When you save, the Gantt chart a flag is automatically added to each regular milestone. Regular milestones can be dragged left or right in the chart to change their date but they cannot have or be dependencies. Regular milestones have no effect on schedule calculations.

By changing the duration of a task line to "0". These are referred to as "task" milestones.

- A regular milestone
- A regular ending milestone
- A task milestone

- A task ending milestone

**Dependency Connectors**

This is a **Start-To-Start(SS)** dependency:

The arrowhead indicates that it is a successor for Task 1 and a predecessor for Task 2

This is a **Start-To-Finish(SF)** dependency:

The arrowhead indicates that it is a successor for Task 1 and a predecessor for Task 2

This is a **Finish-To-Start(FS)** dependency:

The arrowhead indicates that it is a successor for Task 1 and a predecessor for Task 2

This is a **Finish-To-Finish(FF)** dependency:

The arrowhead indicates that it is a successor for Task 1 and a predecessor for Task 2

**Red dependency connectors** indicate that the schedule needs to be recalculated:
The **dashed line segment** of a connector indicates a lag, in this example a lag of +2 days:

The **dashed line segment** of a connector indicates a lag, in this example the lag is -2 days:

**Constraints**

This example shows a task with no constraints:

**Constraint - None**

The following screen shots show various constraints and their constraint dates. Notice how each constraint is displayed in the Gantt chart:

**Constraint - Finish No Later Than**
### Constraint - Must Finish On

![Image of Constraint - Must Finish On]

### Constraint - Must Start On

![Image of Constraint - Must Start On]

### Constraint - Start No Earlier Than

![Image of Constraint - Start No Earlier Than]
Cost Worksheets

Once a Budget Request has been approved, you can view the Budget in the Cost Worksheets section of PMWeb. Currently this allows you to view all the Budgeted Costs for the Project, as well as the origin of those Costs within the system.

Once Phase 2 of the Implementation Project has been completed you will also be able to use Cost Worksheets to compare the Current Budget vs any Change Orders or Costs booked against the project.

Running a Cost Worksheet

1. Open the Cost Worksheet list by navigating to Cost Management/Budgets/Cost Worksheets.

2. In the Project Dropdown select the name of your Project.

3. In the Worksheet Dropdown select the type of Cost Worksheet that you wish to view. Currently only “Budget Worksheet” is available but more may be added at a later date.

4. The Budget Worksheet is divided into several standard Columns, these are:
   a. Cost Code – The Cost Code that ties to that line item. (Construction divisional code)
   b. Budget Description – The Description of Cost Code. (Field text of construction or owner controlled costs)
   c. Original Project Budget – The Approved Budget for that Cost Code.
Note: If you have any Unapproved Budget Requests or Estimates they will not appear here until they have been approved through Workflow.

5. Approved Budget Changes – Any Change Orders that have been approved for this Budget Line.
6. Committed – The total of approved Commitments against the Line Item.
7. Commitments Pending – The total amount of anticipated Commitments against the line.
8. Budget Remaining – The total budget minus the total amount of approved Commitments
9. Division – The Number from the Cost Code
10. Phase – The Project Phase from the Cost Code (if a phased project).
11. Any line on the Worksheet can be expanded by clicking on either the arrow icon to the left of the Cost Codes or the blue values on the line.

12. The expanded view show the source of the value that you clicked on, for now this is just the Budget, but in the future both Commitments and Change Orders will be linked here.