PMWeb User Guide (DRAFT)

Contents

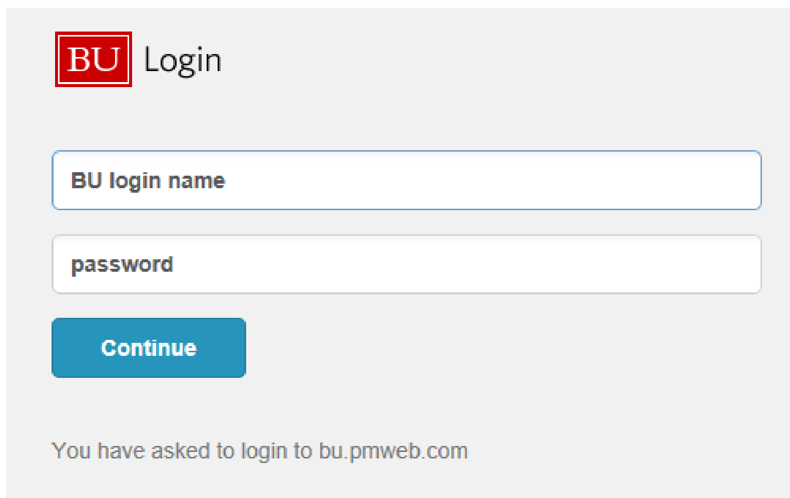
PMWeb Login and Control Panel

PMWeb Login Page (Internal Users Only)

For Boston University 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. Click on the link stating, “If you are a member of the BU Community click here to use your BU login credentials (Kerberos).

3. You will see a standard Boston University Login Screen



4. Enter your BU Username and Password
5. Click the “Continue” button.

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

   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.

PMWeb Home Bar

The Home bar is visible wherever you navigate to in PMWeb; it acts as a Home button. Simply click the **PMWeb Logo** and you will be brought back to the **Controls** or last visited **Tab**. This bar also contains the **Event Center Notification**, **Settings**, **Search PMWeb…**, and **Log Off** buttons.

Figure 1 - PMWeb Home Bar

Settings, pop up menu allows quick access to **Create Reminder**, **Receive Emails**, **Event Center**, **Home** and **My Settings**.

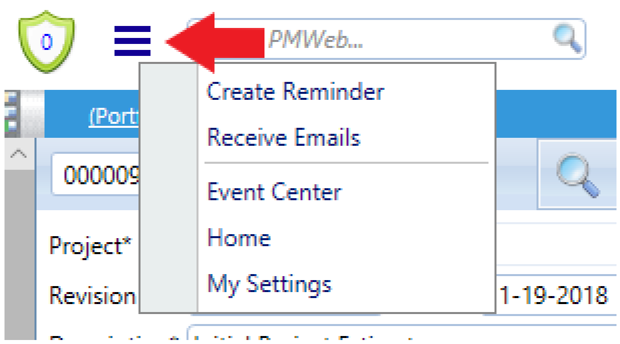


Figure 2 - PMWeb Settings

Controls Tab

Upon **Login**, the **Controls** tab is the first you see. It contains a list of ***Workflow***, ***Collaborate***, ***Notification***, ***My Assignments***, and ***Events*** that need your attention.

Figure 3 - Controls Tab and other Home Tabs

Workflow Inbox

The **Workflow Inbox** contains records that are waiting for your review or approval. To immediately access the record, click the blue hyperlink in the Record field.

Did you Know?

Approves

Returns

Rejects

To Approve, Return or Reject a Workflow in the Workflow Inbox just click the buttons, if you have comments to

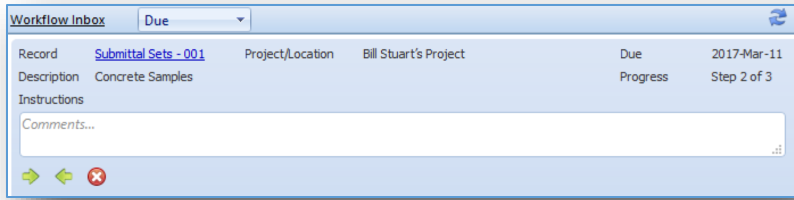


Figure 4 - Workflow Inbox

General Terms and Navigation

General Terms

This guide makes use of several terms that are defined here to help with understanding the processes that follow.

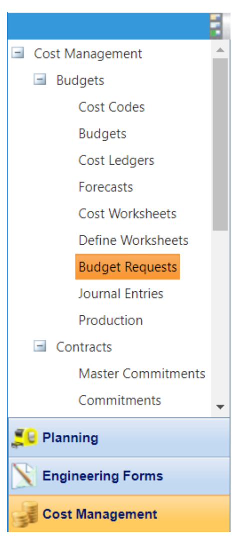
Term	Definition
Module	Modules are the major sections in PMWeb, listed as the blue boxes in the main menu on the left hand side. For example Planning, Engineering Forms, and Portfolio are all Modules in PMWeb.
Record Type	A Record Type is a section of one of the modules. For instance in the Planning Module, Initiatives and Estimates are both Record Types
Record	A record is a single instance of a record type within PMWeb. For instance in the Planning Module, a record would be an individual Estimate.

General System Elements

PMWeb's page design incorporates several common elements. This guide referrers to them to help Users navigate through the various tasks and pages in the system.

Main Menu

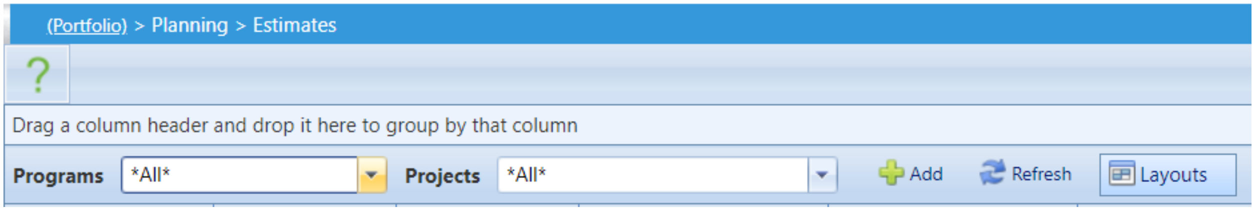
The Main Menu is on the left of every page in PMWeb, it is divided into the Module Boxes, and the Record Type List. When you click on a Module, the list of Record types changes to the list of Record Types in that Module.



Main Menu

Header Bar

The Header bar is at the top of every Record Type or Record page. The buttons available change depending on if you are on a Record Type of individual Record page.



Header for the Estimate record lists.

The list header contains several common features:

a) Program – This is a drop down list of all the Programs (Academic or Business Units) and selecting one filters the list of Records by that Program.

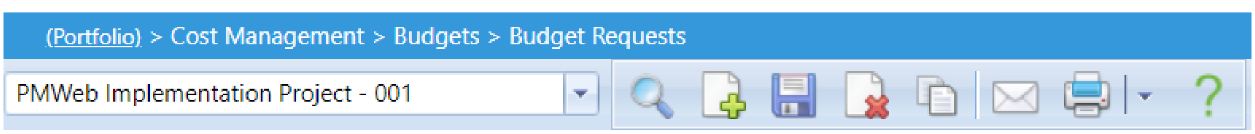
b) Project – This is a dropdown of all Projects in PMWeb that you have access to. Selecting a Project in this list filters the list by that Project.

c) Add – Click this button to add a new instance of that record (Estimate, Schedule, Project Request)

d) Refresh – Click this button to refresh the list of Records, and display newly created records in the list.

e) Layouts – See the “Sorting and Filtering” section of the Guide for a description of the use of this button. (add link to section)

Record Header Bar



Example Record Header bar from the Budget Request Module

The Record header bars have several common features.

a) Record selector – This is a list of all Records of this type that you have access to. You can quickly select a record from this list.

b) Magnifying Glass – Clicking this icon returns you to the list view of the Record Type.

c) New – Click this icon to create a new record.

d) Save – Click this icon to save the current record.

e) Delete – Click this icon to delete the record.

f) Copy – Click this icon to create a copy of the record.

g) Notification – Click this icon to send a notification to another user to look at the record.

h) Print – Run a report based on this Record. You can then choose to print the report.

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 instructions below apply to all modules, and will help you with general navigation of the site.

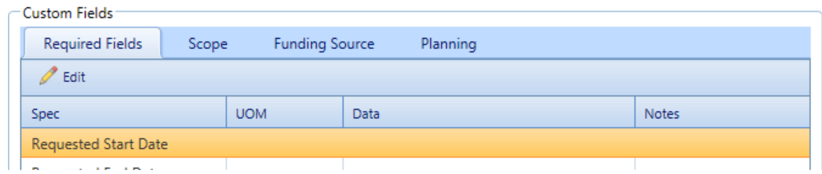
Selecting and Editing Fields

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.

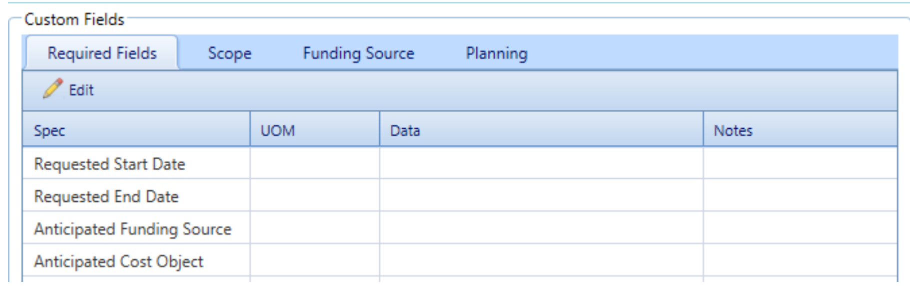
- Clicking and Editing

  (Recommended for editing Individual Fields)

  1. Click the line that you wish to edit.

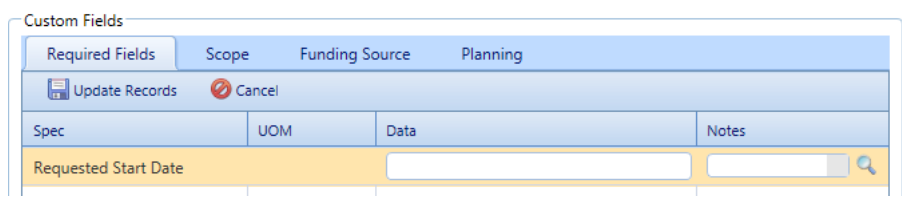
  

  2. Click the **Edit** button at the top of the list to begin editing the line.

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

  3. Enter your changes into the line.

  4. 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:
     - Hold shift and click the last in the set of lines that you want to edit.
     - 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)

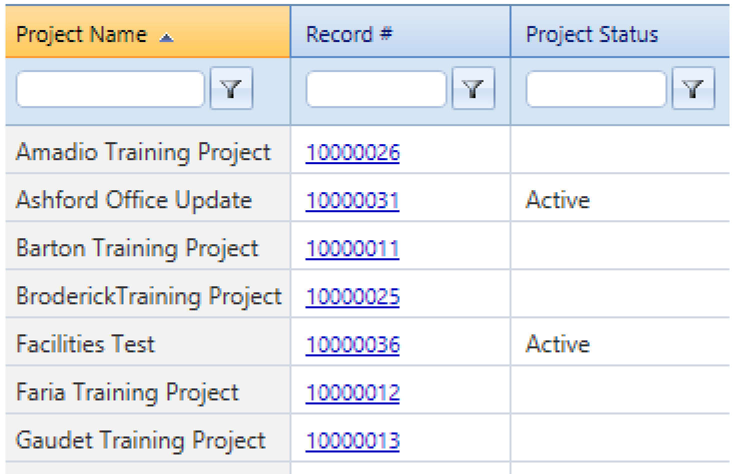
  1. Left-click and drag your mouse over the whole section of lines that you wish to select, and then release the mouse button. (The lines you have selected will be highlighted in orange)
  2. Click the **Edit** button, and enter your changes into the line.
  3. Enter your changes into the line.
  4. Click the **Update Records** button once you are complete.

Sorting and Filtering Tables in PMWeb

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

Sorting/Filtering Tables in PMWeb

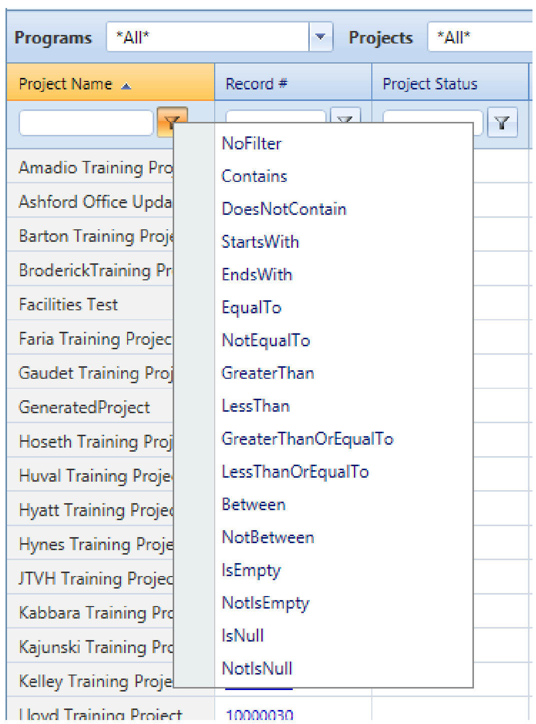
Sorting – To sort by any Column in PMWeb click the name at the top of the Column, and the column will sort alphabetically. To sort by reverse alphabetical order, click the name again and the order will reverse.



Project Name	Record #	Project Status
Amadio Training Project	10000026	
Ashford Office Update	10000031	Active
Barton Training Project	10000011	
BroderickTraining Project	10000025	
Facilities Test	10000036	Active
Faria Training Project	10000012	
Gaudet Training Project	10000013	

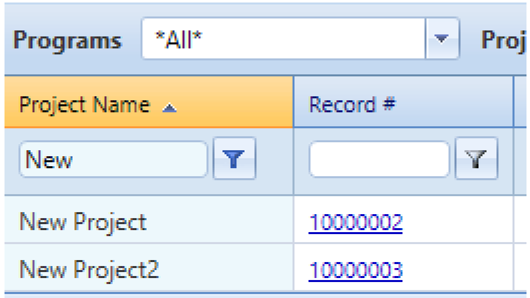
Projects sorted alphabetically by Column Name.

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.



Filtering method

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.



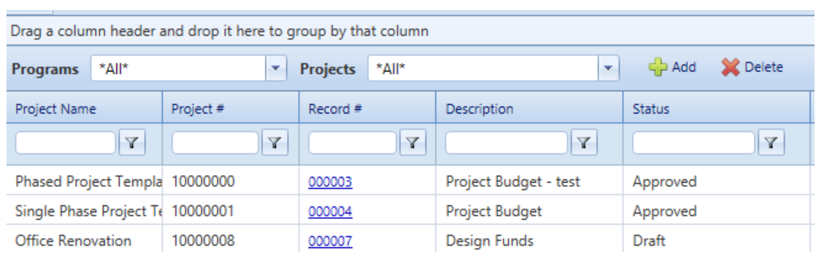
Project Name	Record #
New	
New Project	10000002
New Project2	10000003

Projects filtered by names that Contain the word "New".

Grouping Tables in PMWeb

Follow these steps to Group the Tables in PMWeb.

1. 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."



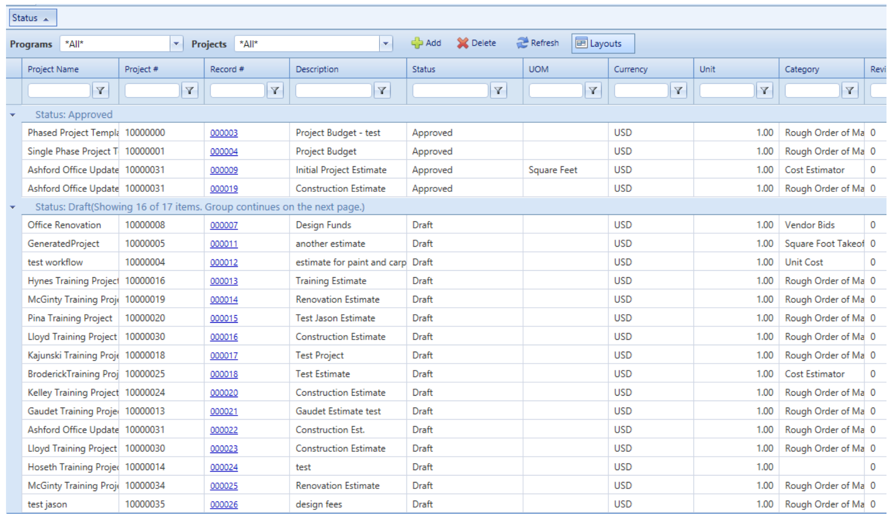
Drag a column header and drop it here to group by that column

Project Name	Project #	Record #	Description	Status
Phased Project Templa	10000000	000003	Project Budget - test	Approved
Single Phase Project Te	10000001	000004	Project Budget	Approved
Office Renovation	10000008	000007	Design Funds	Draft

Table view showing the grouping bar at the top.

2. 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.



Status ▲

Programs *All* Projects *All* Add Delete Refresh Layouts

Project Name	Project #	Record #	Description	Status	UOM	Currency	Unit	Category	Revi
Status: Approved									
Phased Project Templa	10000000	000003	Project Budget - test	Approved		USD	1.00	Rough Order of Ma	0
Single Phase Project T	10000001	000004	Project Budget	Approved		USD	1.00	Rough Order of Ma	0
Ashford Office Update	10000031	000009	Initial Project Estimate	Approved	Square Feet	USD	1.00	Cost Estimator	0
Ashford Office Update	10000031	000019	Construction Estimate	Approved		USD	1.00	Rough Order of Ma	0
Status: Draft(Showing 16 of 17 items. Group continues on the next page.)									
Office Renovation	10000008	000007	Design Funds	Draft		USD	1.00	Vendor Bids	0
GeneratedProject	10000005	000011	another estimate	Draft		USD	1.00	Square Foot Takeof	0
test workflow	10000004	000012	estimate for paint and carp	Draft		USD	1.00	Unit Cost	0
Hynes Training Project	10000016	000013	Training Estimate	Draft		USD	1.00	Rough Order of Ma	0
McGinty Training Proje	10000019	000014	Renovation Estimate	Draft		USD	1.00	Rough Order of Ma	0
Pina Training Project	10000020	000015	Test Jason Estimate	Draft		USD	1.00	Rough Order of Ma	0
Lloyd Training Project	10000030	000016	Construction Estimate	Draft		USD	1.00	Rough Order of Ma	0
Kajunski Training Proje	10000018	000017	Test Project	Draft		USD	1.00	Rough Order of Ma	0
BroderickTraining Proj	10000025	000018	Test Estimate	Draft		USD	1.00	Cost Estimator	0
Kelley Training Project	10000024	000020	Construction Estimate	Draft		USD	1.00	Rough Order of Ma	0
Gaudet Training Proje	10000013	000021	Gaudet Estimate test	Draft		USD	1.00	Rough Order of Ma	0
Ashford Office Update	10000031	000022	Construction Est.	Draft		USD	1.00	Rough Order of Ma	0
Lloyd Training Project	10000030	000023	Construction Estimate	Draft		USD	1.00	Rough Order of Ma	0
Hoseth Training Projec	10000014	000024	test	Draft		USD	1.00		0
McGinty Training Proje	10000034	000025	Renovation Estimate	Draft		USD	1.00	Rough Order of Ma	0
test jason	10000035	000026	design fees	Draft		USD	1.00	Rough Order of Ma	0

List of Estimates in PMWeb grouped by Estimate Status.

Creating and saving a Custom Table Layout in PMWeb

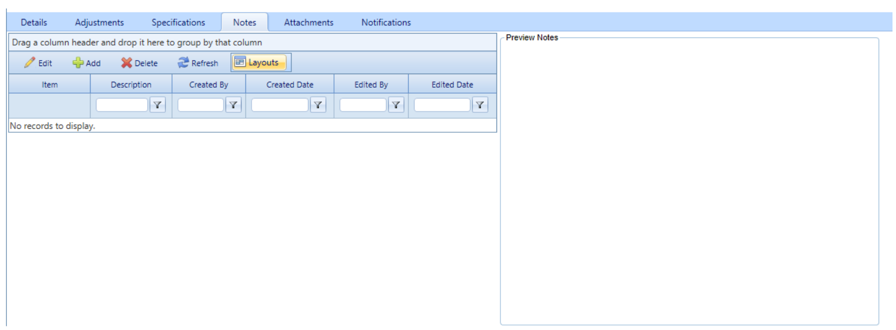
Once you have sorted and filtered a table, you can then save that setup as a Layout in PMWeb, by clicking the "Layouts" button on the top of the table.

Creating Notes on Records in PMWeb

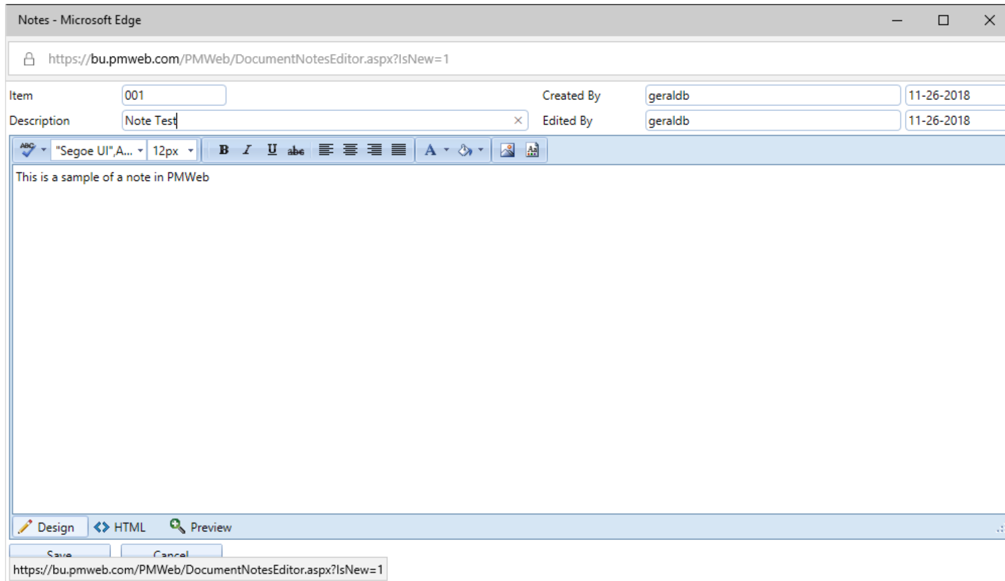
All records in PMWeb have a Notes tab that allow users in the system to attach notes.

Creating a Note

1. From any record in PMWeb click the **Notes** tab.

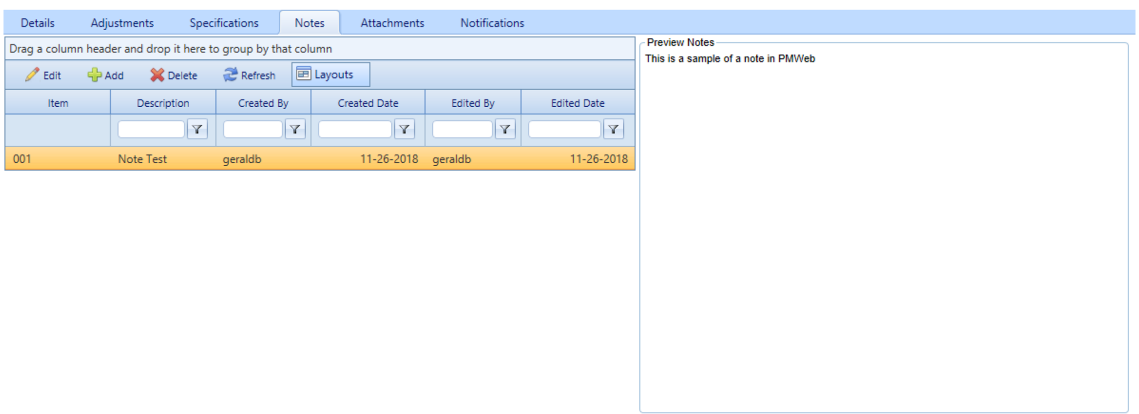


2. Click the "Add" button at the top of the table.
3. A box will open with the current date and your user name automatically populated.
4. In the **Description** field enter a title for your note.
5. Type your note into the word box below.



6. Click the **Save** button at the bottom of the window.

To preview a Note that was already created click on the note in the list, and a preview of the note will appear in the box to the right.



Previously created note with preview

Using the Document Manager and Attaching Files to Records

PMWeb's **Document Manager** tool acts as a central repository for all Documents for each **Project**. The **Document Manager** allows easy sharing of documents amongst the entire Project Team. (Note: Larger CAD files cannot be uploaded to the Document Manager.)

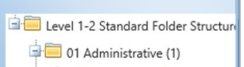
The template Projects in PMWeb have a folder structure that is passed down to all **Projects** created using those templates. This allows for a consistent folder structure and ease of locating any Documents.

All project documents should be loaded/saved into the document manager, and then attached to the record. This allows for ease of searching, visibility, and reporting. Attaching a document directly to a record does not meet this need.

Uploading to the Document Manager

Power Feature

The number in parenthesis next to the name of the folder shows the number of documents uploaded to the child folders within.



1. In the Main Menu navigate to *Engineering Forms/Document Manager*. Scroll through the list of **Projects** to find 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 two general folders, “Level 1-2” and “Level 3-4- 5”. These folders contain the default folder structure for the Level 1 and 2 Projects vs Level 3-5 Projects.

   Note: This folder structure was copied from the template for your project.
4. Click on the Plus Icon next to the correct Level range for your project.
5. In the folder structure that opens, click the plus icon to navigate to the desired 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
      i. Locate the file on your computer.
      ii. 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
      i. Click the “Or Browse to Upload” button.
      ii. 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

10. Once a document has been uploaded to the **Document Manager** it can then be attached to any record within PMWeb.

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 to the Org unit that is the project is for.

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.

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 projects and locations that you have access to.

Linking Documents from the Document Manager to a PMWeb Record

1. On the record you wish to attach the document to, click on the "Attachments" tab.
2. In the top bar, click "Document Manager"
3. The window that opens will only have the folder for the specific Project your record is for, and the Shared Folders. This means that any files you wish to attach to a record must be in the folder for that record in the **Document Manager**.
4. Navigate through the **Document Manager** folder structure to your file.
5. Click on the file in the list.
6. Click "Save and Exit"
7. The file you chose will appear as an attachment to the record.

Workflow Inbox and Actions

The Workflow Inbox contains records that are waiting for your review or approval.

Completing a Workflow Action

Follow these instructions to complete the step of the workflow(s) that you have been assigned.

1. In the Workflow Inbox on the home page Controls Tab click on the Workflow Inbox link to open the whole list of Workflow steps you have been assigned.

2. Click on the blue Document ID link to open the Workflow.
3. The record will open with the *Workflow* tab selected.
4. On the left side of the tab you will see a list of options.
    a. Approve – Approve the workflow and send it to the next step.
    b. Return – 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.

5. 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.
6. Once you have made your selection and entered any comments hit the *Save* button at the bottom of the selection to send the Workflow to the next person in the chain.

Mass Updating Information in PMWeb

PMWeb allows you to export, import, and paste information directly from Microsoft Excel into PMWeb for some of the record types, currently Estimates, Initiatives, and Budgets.

Note: If you chose to edit outside of PMWeb, you can only import values. Any formulas that you import will cause an error.

Exporting from PMWeb

Follow these steps to Export records from PMWeb into Excel.

1. Click the "Export to Excel" button at the top of the list that you want to Export.

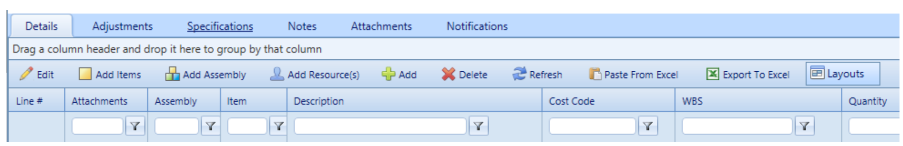


Table showing the Export to Excel button.

2. Choose the location where you want to save the file.
3. Open the file in Excel to edit.

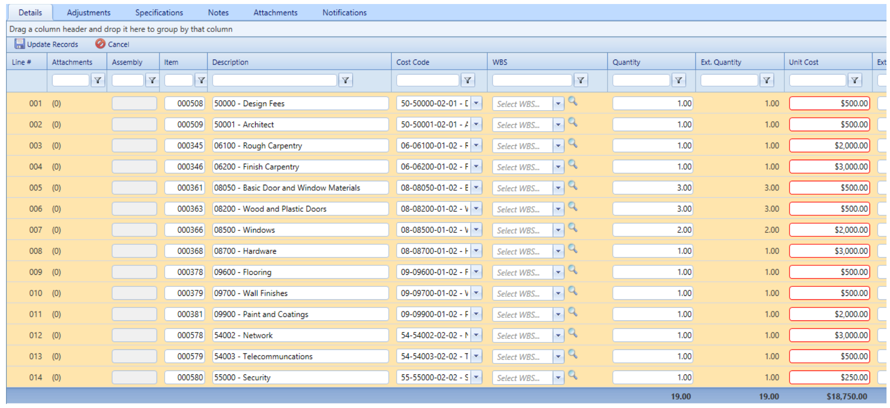
Copying from Excel into PMWeb

Once you have completed editing the file in Excel, you can now copy individual columns directly from Excel into PMWeb.

Note: These columns must be the proper data type for the paste to work, and must not have any formulas.

4. Open the set of rows in PMWeb that you want to update.

5. Click the name at the top of the Column you want to insert the data in, the values in the Column will now have a red box around them indicating where the pasted values will be entered.



Estimate record showing the Unit Cost Column selected to have new values pasted in from Excel.

6. Copy the single column of values from Excel, but do not copy the header name.
7. Paste the values back into PMWeb by selecting the window and then pressing CRTL-V on your keyboard.
8. The values in the rows/column that you selected will update and any derived values, for instance Total Cost, will also be updated to reflect the new data points.
9. Click the "Update Records" button.

PMWeb Portfolio

A **PMWeb Portfolio** is defined as the database that contains it. Each portfolio can contain many programs and each program can contain many projects and or initiatives. A powerful and unique feature of PMWeb is that you can view and input data at all three of these levels.

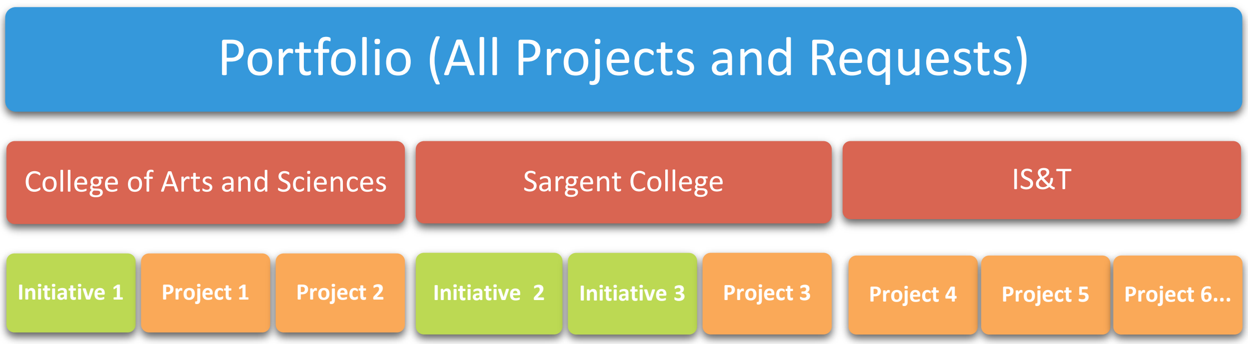


Figure 5 - Each Portfolio can contain Many Programs and Each Program can contain Many Projects

The **PMWeb Portfolio** module serves multiple functions for setting and managing information in PMWeb:

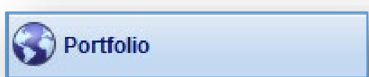
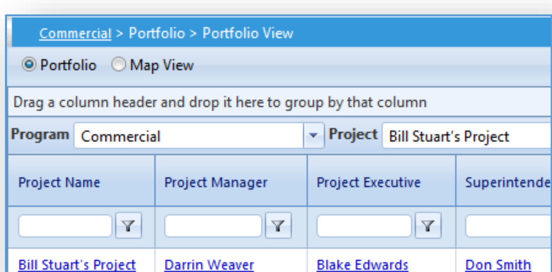


Figure 6 - Portfolio on the Navigation Pane

- Viewing data across the portfolio and drilling down to underlying information utilizing PMWeb Reports, BI Reports and Portfolio View
    - **Portfolio View** - Manager Page View of all projects in the portfolio. Summary view of all projects in terms of cost, schedule and percent complete



Creating Project Requests, and Submitting to Workflow.

Creating a Project Request and Submitting to Workflow

Project Requests are submitted in PMWeb for review and approval by the appropriate entities. These Project Requests can be entered by anyone in the system, but must go through workflow before they can be approved and turned into active projects. This section of the guide will show you the process for creating a Project Request, and submitting it for review by the Approvals Group.

Steps

1. In the Main Menu click on the Portfolio Module..
2. Click on Project Requests.

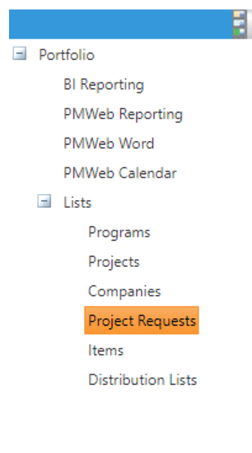
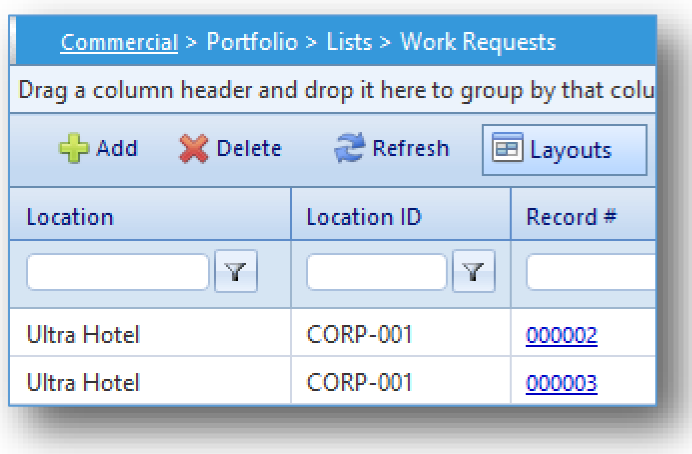


Figure 7 - Portfolio > Lists > Project Requests

The **Project Requests Manager** page opens.



3. In the toolbar click the ***Add*** button. 

4. An empty **Project Requests** record opens. The Contact information is auto-populated based on your login information.

5. In the toolbar click the ***Save*** button. 

   Note: If you do not save at this point, your project request number could be duplicated by a different user, requiring you to restart the request process.

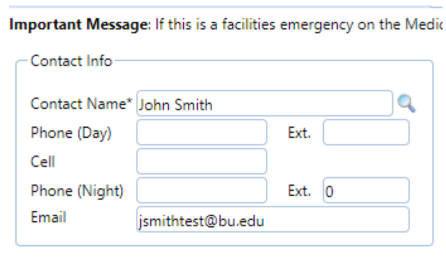


Figure 8 - Login - Contact Information

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.

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.

   Note: The number in parenthesis before the street address is the building code.

8. The **Record #** field is a greyed out and will be auto-populated by the system. This number is to identity your project request throughout it's lifecycle.

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.

   Note: Select "Space Request Only" if this is a request without any construction work desired.

10. In the **Type** field select the type of project.

    a. Academic (Unit Reports to Provost)

    b. Non-Academic (Unit Reports to Administration)

    c. Infrastructure (Building Renewal)

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

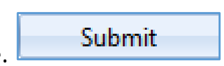
12. In the toolbar click the ***Save*** button. 

    Note: The header must be filled out and saved in order for the Required Fields to be editable.

13. In the tabs below the header of the project request find the tab that says Required Fields.
14. Open the fields for editing and in the **Data** column enter in the requested information.
    a. Requested Start Date – The date you would like construction to begin in an ideal situation.
    b. Requested End Date – The date you would like the construction to conclude in an ideal situation.
    c. Anticipated Funding Source – The Funding source you think the project will be funded by.
    d. Anticipated Cost Object – The Cost Object you think this project will be applied to.
    e. Is this related to a faculty new hire (yes or no) – If this is a new hire project click yes, else no.
    f. New Employee Number – if this is a new hire project, enter the ID of the new hire, else leave blank.
    g. Requesting Department – Select your department.
    h. Are you looking for additional space or square feet? (yes or no) – If you are looking to expand the size of your space click yes, and fill in the amount of additional square footage you would like to add.
    i. Estimated Square feet - If you answered yes to the above question, give an estimate of the number of square feet you wish to add, if known.
    j. Demolition – Will your project require the removal of walls or redo of ceilings or floors?
    k. Systems Furniture or Work Stations – Will you need any new cubicles or work stations?
    l. Heating, ventilation, AC - will your project modify any heating, ventilation or AC?

       Note: If ceilings are being impacted, click "Yes"

    m. Walls to be moved or built? – Will your project require any walls to be either moved or created?
    n. Design Assistance Required? – Will you need design help with your project? Such as assistance from an architect or designer?
    o. Do you plan on implementing this Project once it is Approved?
        - Yes: The request is for a Project that will be approved and implemented upon acceptable scope of work and estimate.
        - No: The request is to try and define a scope of work and get an estimate for a project that may be pursued at a future date.
        - Maybe: Unsure if Project will be directly implemented or just looking for an estimate. Please provide further information in the “Notes” section.

3. Click the “Update Records” button at the top of the list of Specification Fields.
4. Click on the “Scope” tab.
5. Open the fields for editing and click the check-box next to any types of work that you believe your project will require.
6. Click the Update Records button
7. Click on the “Funding Source” tab and modify/check off the source you anticipate the funds for your Project to come from.
8. Click the ***Submit*** button in the upper right of the page. 

   The **Project Request** is submitted to Workflow.

   Note: The fields in the Project Request will be locked once the request has been submitted.

Managing a Project Lifecycle

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

Updating and Reviewing a Project

A project should only be created manually if an exception has been made to the Project Request workflow. Usually these project requests come from University Leadership.

All other Projects must go through the Project Request or Initiative Workflow, including emergency maintenance projects, to ensure proper approvals have been made.

> **Did you Know?**
>
> *Once you have created and saved one project ID in your portfolio, PMWeb will automatically suggest the next sequential ID when creating projects. You may override the default if you wish.*

Steps

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

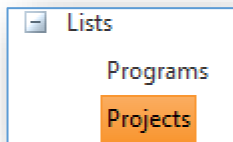
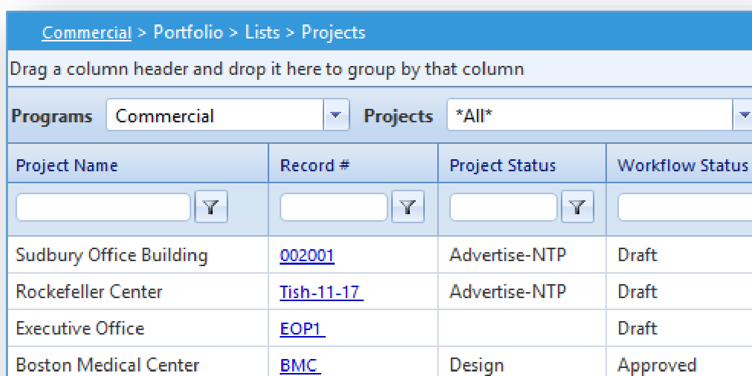


Figure 9 - Portfolio > Lists > Projects

The **Projects Manager** page opens.


Commercial > Portfolio > Lists > Projects

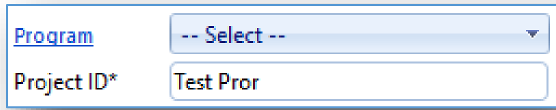
Drag a column header and drop it here to group by that column

Programs: Commercial | Projects: *All*

Project Name	Record #	Project Status	Workflow Status
Sudbury Office Building	002001	Advertise-NTP	Draft
Rockefeller Center	Tish-11-17	Advertise-NTP	Draft
Executive Office	EOP1		Draft
Boston Medical Center	BMC	Design	Approved

2. In the toolbar click the ***Add*** button. 

   An empty **Projects** record opens.



3. The **Program** is the University academic or business unit of the project client. This also controls security access and workflows for the project.
4. The **Project ID** field auto-populates with the next ascending value, and cannot be modified by the user.
5. The Project **Name** conforms to a specific standard to make searching an identifying specific projects much easier for the whole team.
    a. The project name consists of several pieces of information separated by underscores:

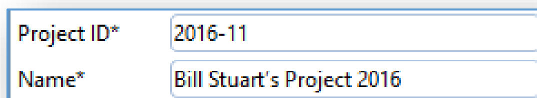


Figure 10 – Use First and Last Name's + Project + Year for the Project Name

6. The **Project Status** has one of three options
    b. Active – Project is being actively worked on.
    c. Closed – Project has been completed and closed.
    d. Hold – Project is on hold.
7. The **Project Type** and **Category** fields help structure PMWeb views and reports so that similar Projects can be grouped together.
8. **PBS** holds the name of the Project Manager for Reporting and Sorting Purposes
9. The **Placeholder Budget** field holds the estimated budget of the project prior to any Scoping, Planning or Design work has been completed, the actual budget of the project will be entered in the **Budget** module at a later point.
10. **Target Duration** and **UOM (Unit of Measure)** Select the target unit of measure, Days, Months, Years, and estimate the d length of the project.
11. **Target Start**, is the start date of work on the project.
12. **Target Finish**, is the targeted completion date of the project.

13. The **Original Scope** field holds the starting scope of the project. This field remains the same throughout the project lifecycle. Current Scope is documented under the Specifications tab in the **Current Scope** tab.
14. The **Request ID** field will be auto populated if the project was created through a **Project Request** or **Initiative**.
15. The **Project Phase** dropdown shows the current phase that the project is in.
16. Once any changes have been made in the toolbar click the ***Save*** button.

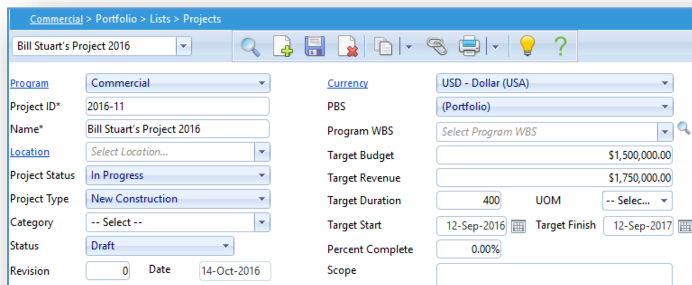
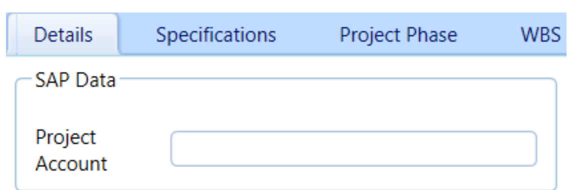


Figure 11 - Projects Record

The **Details** tab displays

17. The **SAP Data** section holds the SAP account code for the project, which is entered by business affairs.



18. Once any changes have been made in the toolbar click the ***Save*** button.

19. Click on the **Specifications** tab.

These values can be changed by anyone with write access to Projects (Project Managers and Executives) by highlighting the line or lines that you want to change and clicking the **Edit** button.

Note: Core Team, Internal Stakeholders, and External Stakeholders tabs do **not** control access to the project. They are used for Reporting and as a Quick Reference. Access to the Project is granted through the "Users" tab.

   e. The **Core Team** tab tracks who are in the main roles for the Project Team.

      The **Internal Stakeholders** are BU employees who are outside the core team but still involved with the project. (For example: BUPD, EH&S, and IS&T)

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

   g. The **Project Level** tab holds the level of the project.

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

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

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

    By default users can only view those projects that are assigned to their Academic or Business unit.

    Note: To request a user to be added to PMWeb, first add them as a contact to their Company (see Company Section), and then submit a Ticket to the helpdesk for the User to be granted access to PMWeb.

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

    Note: See the "Note" section under PMWeb Basics for instructions on adding a note to Record in PMWeb.

22. The **Attachments** tab allows you to attach specific documents to a project.

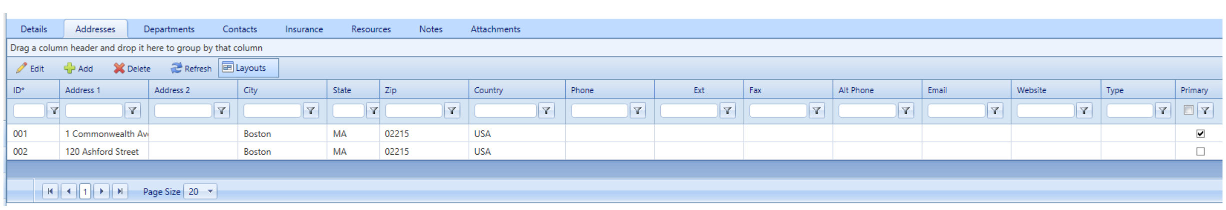
    Note: See the "Document Manager" section under PMWeb basics for instructions on how to load documents into PMWeb and then link them to a record.

Companies

Companies in PMWeb are created by the System Administrators, and must first be verified as Suppliers through Boston University's Procurement Department as well as SAP. Once a Company is created any Project Manager can add contacts to that Company, and then request that those Contacts be created as Users.

General Navigation

1. Use the menu to navigate to *Portfolio/Lists/Companies*.
2. Click the blue Record # link to access the Company record.
3. In the Header of the Record you will see several fields.
   a. **Company ID** – This is the Company's Account Number from SAP.
   b. **Name –** The full name of the Company, and the primary way you will search for the company in any lists.
   c. **Type –** The type of work that the Company Performs, for example Architect, Contractor, Life Safety
   d. **Abbreviation** – A shortened version of the Company's name, this can be used in either Reports or Forms in PMWeb to save space on longer company names.
4. Under the header there are several tabs with more detailed information on the Company
   a. **Details** – This tab holds the Primary Mailing Address of the Company, which is indicated on the **Addresses** Tab.
   This tab also holds all the **Specification** (BU – Configured) tabs about the Company to better help sort and identify the Companies in PMWeb
   b. **Addresses** – This is a list of all the physical and mailing addresses for the Company. One of these addresses is selected as Primary and is the address displayed on the **Details** tab.
   Note: The ID column at the left of the address fields is very important as it is what identifies the mailing address for each **Company Contact** in PMWeb.



Completed Address Record in PMWeb, with Primary Address Checked

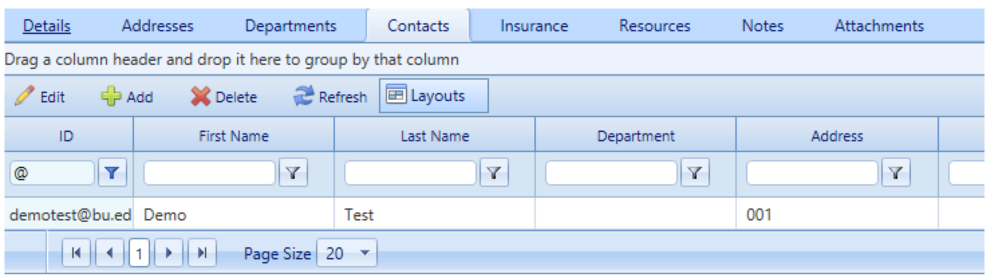
c. **Departments –** Though largely unused, if there is specific contact information for a department within a Company, that information is listed here.

d. **Contacts –** These are the names, phone numbers, and email addresses of BU's contacts at the various companies.

Please Note:

i. Any individual who needs to be a user in PMWeb must first be set up as a contact. Once they are a contact in PMWeb a ticked must be submitted to the helpdesk (ithelp@bu.edu), for them to become a user

ii. Since the list of users in PMWeb is created from the contacts, the ID field in the Contacts list will also be their User ID in PMWeb, which, for any users outside of BU, is their Email Address.



Completed Contact Record with Email Address as User ID

e. **Insurance**

f. **Notes**

g. **Attachments**

5. **Specification Fields** – The Specification Fields section, under the *Details Tab*, holds a large array of information about the **Company** that helps with both reporting and general sorting of Companies. The Specifications themselves are divided into several tabs.

a. **Specialties**

b. **Scope Area**

c. **Professional Service**

d. **Certifications**

e. **Municipality**

f. **Labor Type**

g. **Project Size**

Creating a Contact

Follow these steps to create a new Contact for a Company in PMWeb.

1. Use the menu to navigate to *Portfolio/Lists/Companies*
2. In the white box below the title of the Company tab, type in the name of the Company you wish to add a Contact to and hit Enter.
3. Click on the blue Record Number link to enter the Company Record.
4. In the list of tabs below the Header click the “Contacts” tab.
5. Click the “Add” button at the top of the list.
6. In the **ID** field enter the email address of the Contact
7. Enter the **First Name** and **Last Name** in the appropriate fields.
8. Select an **Address ID** from the drop down list that corresponds with the correct **Address** for the Contact. Click the “Save” button at the top of the list to add the Contact to the Company.

PMWeb Scheduling

PMWeb Scheduling allows you to track any project schedule, milestones, and critical path method appropriate to your needs. Schedules in PMWeb can be linked to most forms in the application and produce Scheduling Dashboards associating schedule cash flow, earned value and comparative schedules over the course of your project. Schedules can be rolled up over all your Portfolios, Programs or Projects to see all your schedules from start to finish.

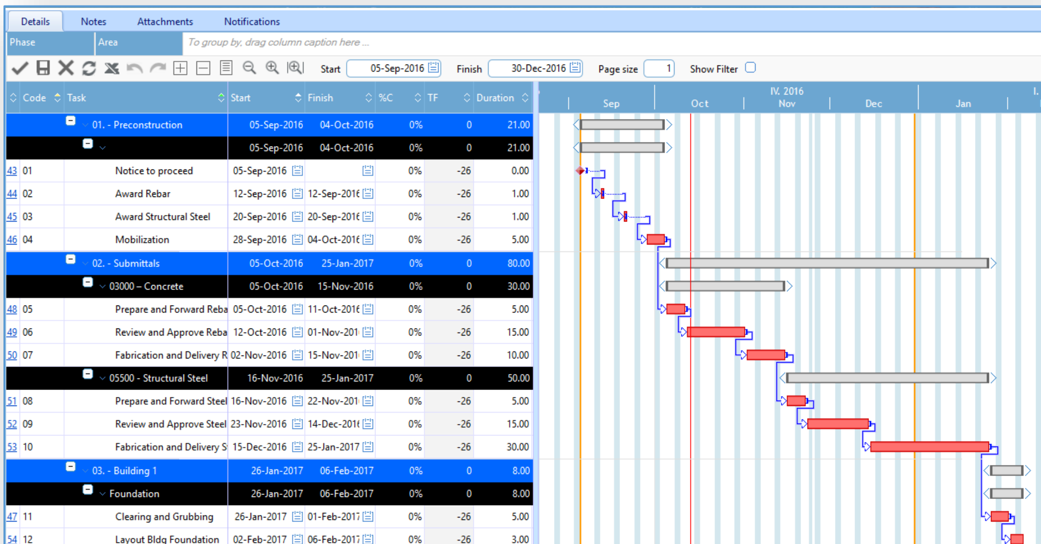


Figure 12 – Schedule in PMWeb

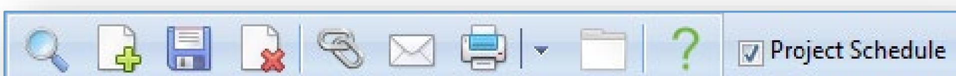


Figure 13 - PMWeb Header Schedule Toolbar

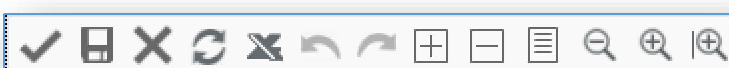


Figure 14 - Scheduling Toolbar

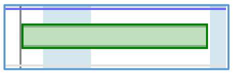
Reading the Gantt Chart

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.

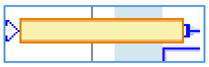
Task Bars

- A task not on the critical path which is 0% complete

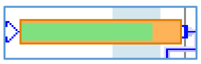
- A task not on the critical path which is 30% complete



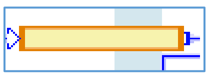
- A task which is 100% complete



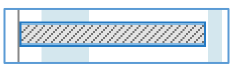
- A task on the critical path which is 0% complete



- 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

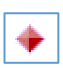
A milestone has a date but no duration. Milestones can be created two ways:

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

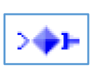
  Milestones created using this method are referred to as "regular" milestones. One task line can contain many regular milestones. When you save, the Gantt chart a flag is automatically added to each regular milestone. Regular milestones can be dragged left or right in the chart to change their date but 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.

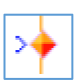
- A regular milestone



- A regular ending milestone



- A task milestone

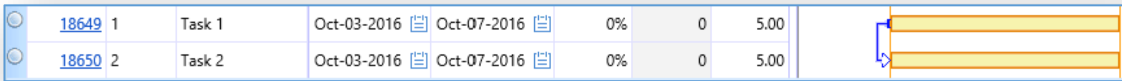


- A task ending milestone

Dependency Connectors

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

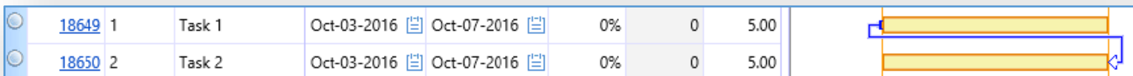
The arrowhead indicates that it is a successor for Task 1 and a predecessor for Task 2



18649	1	Task 1	Oct-03-2016	Oct-07-2016	0%	0	5.00
18650	2	Task 2	Oct-03-2016	Oct-07-2016	0%	0	5.00

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

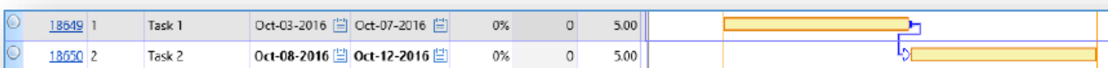
The arrowhead indicates that it is a successor for Task 1 and a predecessor for Task 2



18649	1	Task 1	Oct-03-2016	Oct-07-2016	0%	0	5.00
18650	2	Task 2	Oct-03-2016	Oct-07-2016	0%	0	5.00

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

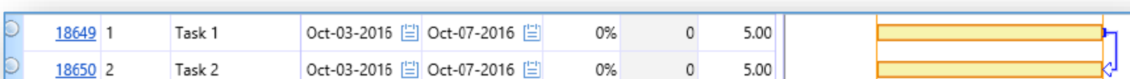
The arrowhead indicates that it is a successor for Task 1 and a predecessor for Task 2



18649	1	Task 1	Oct-03-2016	Oct-07-2016	0%	0	5.00
18650	2	Task 2	**Oct-08-2016**	**Oct-12-2016**	0%	0	5.00

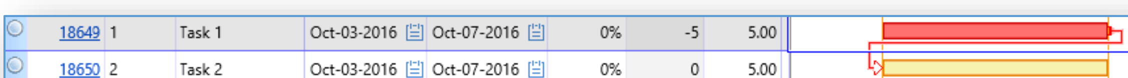
This is a **Finish-To-Finish(FF)** dependency:

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



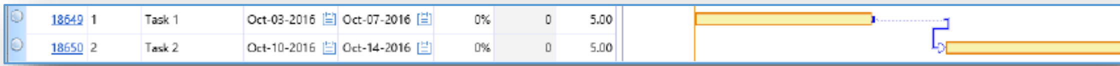
18649	1	Task 1	Oct-03-2016	Oct-07-2016	0%	0	5.00
18650	2	Task 2	Oct-03-2016	Oct-07-2016	0%	0	5.00

Red dependency connectors indicate that the schedule needs to be recalculated:

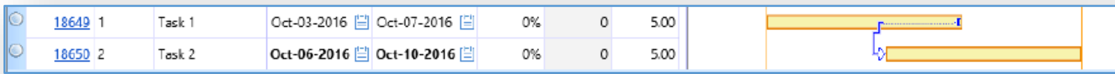


18649	1	Task 1	Oct-03-2016	Oct-07-2016	0%	-5	5.00
18650	2	Task 2	Oct-03-2016	Oct-07-2016	0%	0	5.00

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:

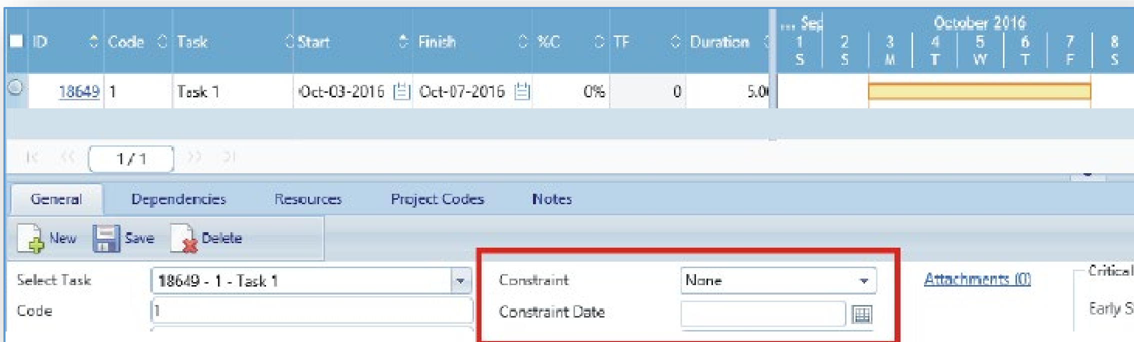


Figure 15 - Constraint - None

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

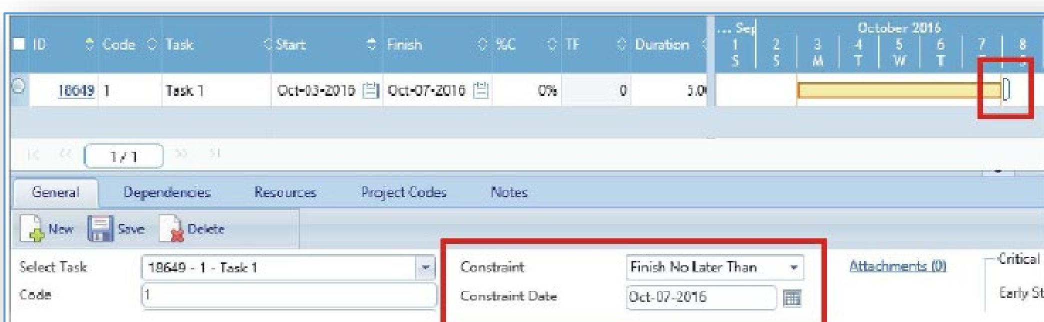


Figure 16 - Constraint - Finish No Later Than

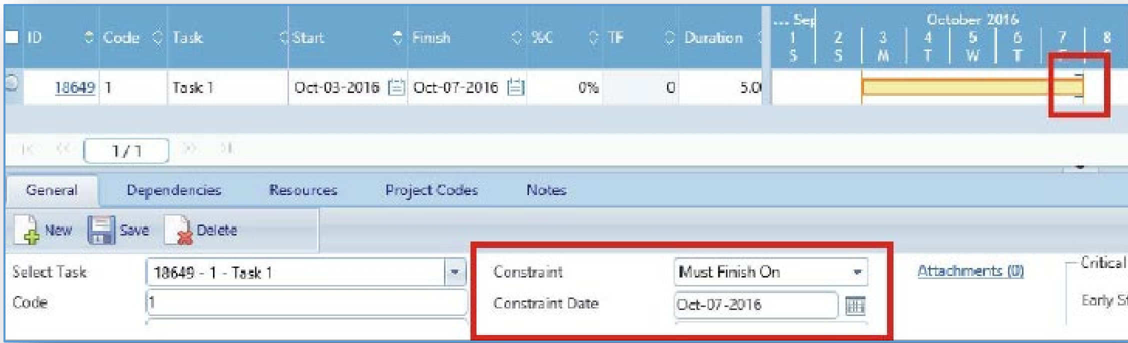


Figure 17 - Constraint - Must Finish On

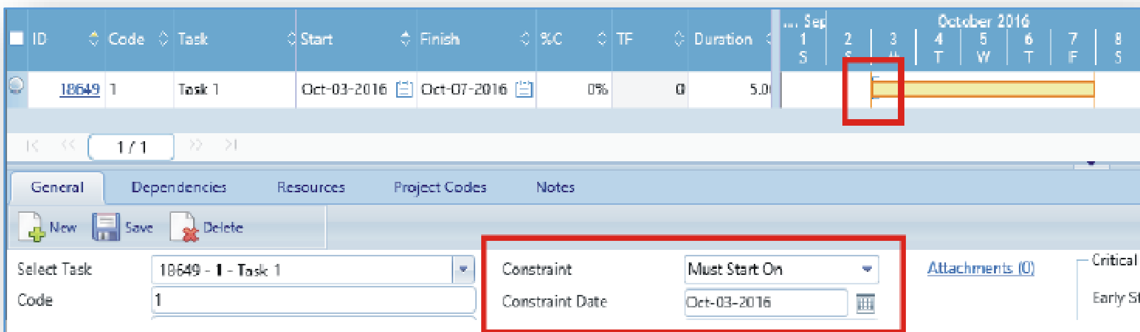


Figure 18 - Constraint - Must Start On

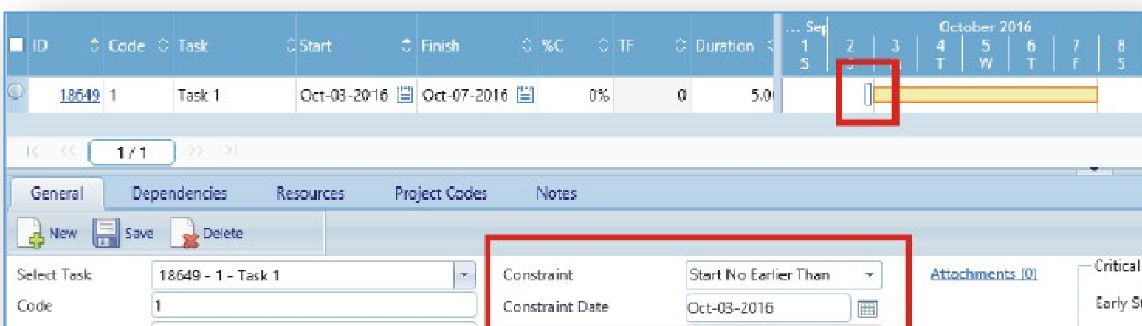


Figure 19 - Constraint - Start No Earlier Than

Copying a Template Schedule and Updating Tasks

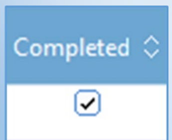
Creating a **Project Schedule** from a *Template* allows for accurate reporting of all projects, including the SPACE Report for Level 3 – 5 projects.

In this lesson, you will copy a template schedule and then modify it to include % Completes, Remaining Durations, Actual Starts and Finishes.

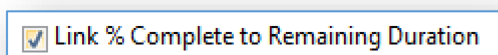
Steps

Did you Know?

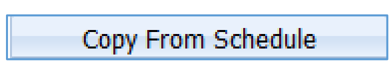
You can also use the Completed Checkbox to mark a task 100% Complete.



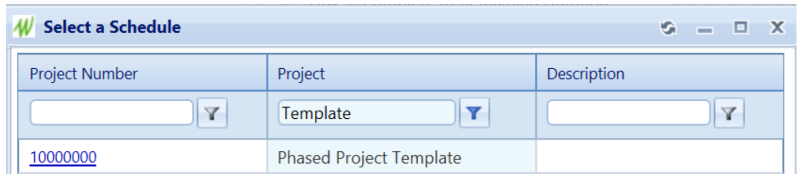
1. Use the menu to navigate to *Scheduling/ Scheduling/Schedules.*
2. Click the **Add** button.
3. In the **Project** field select your project.
4. In the **Status Date** field select the start date of your project
5. In the **Description** field enter a description of the schedule you are creating.
6. In the calendar field select "001 – Standard." This calendar pre-populates all the days in the Calendar year that work is not able to be done at BU. In the Settings section, check the box next to Link % Complete to Remaining Duration. This indicates that when the **Remaining Duration** is updated the **% Complete** will be updated as well.



7. In the "Settings" section select Auto in the **Schedule Tasks.** This selection means that PMWeb updates the schedule dependencies based on the template selected. Click the **Save** button to create a blank schedule to load the template into.
   Note: This step is essential. Loading a template onto a unsaved schedule will overwrite both the Project Name and Schedule Description fields with the name and description from the template schedule.
8. In the **Actions** section, click the ***Copy From Schedule*** button.



The **Select a Schedule** dialog opens.

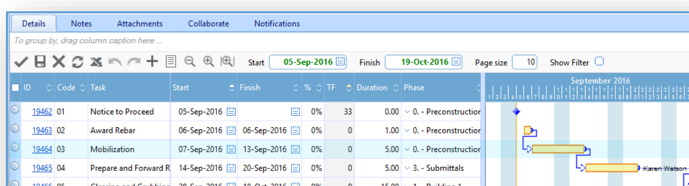


9. ***Select*** the hyperlink of either the “Single Phase” or “Phased Project” template.

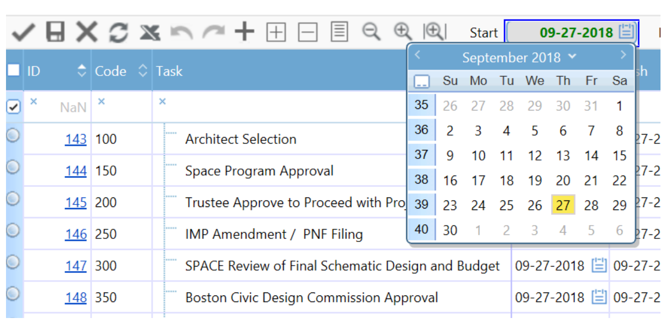
   PMWeb will load the template schedule into the *Details* tab of the new project, with all tasks having the base start and end date populated from the template you chose.

   Note: If you want to remove any of the lines from the template schedule, click the circle/radio button to the left of the schedule item (the item will be highlighted in orange to show it is selected) and then click the black “X” at the top of the schedule.

   Note: By right clicking on the Gant schedule you will see several zoom options available.



10. In the header bar of the schedule enter the current start and end date of the project by clicking on each date and selecting the day in the calendar that opens.



11. Click the Save icon on the details bar to update the schedule with your new start date.
12. Click on the ID of a task in the list, and the "General" tab below will display details for that specific task.

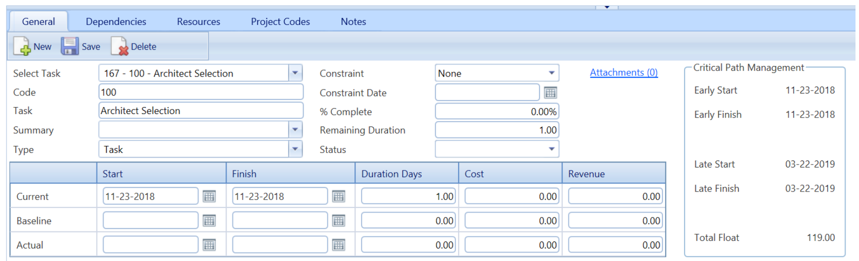


Figure 119 – Task Details section, General Tab

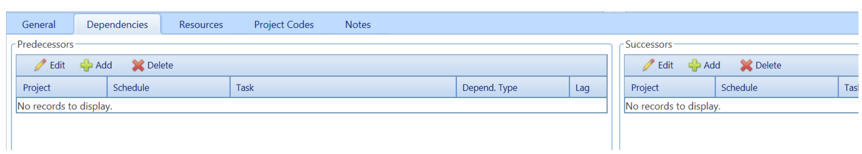
13. In the *General* tab you will see fields for a set of Dates.

    In both the Current and Baseline rows, enter the start and finish date for the task.

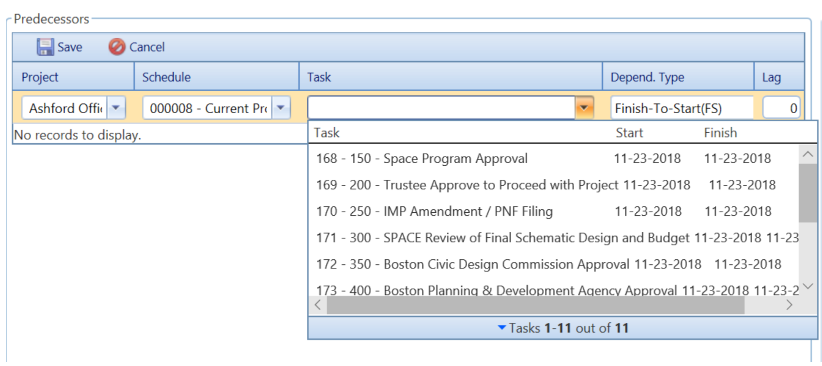
    Note: You can also just enter the Start date and duration, and the end date will auto-populate.

    Note: If these dates change, you can enter the new dates in the Current row and the *Critical Path Management* section will update with the appropriate information.

14. Click the **Save** button in the General tab to save your changes.
15. On the tab-bar of the task Details section click the *Dependencies* tab.

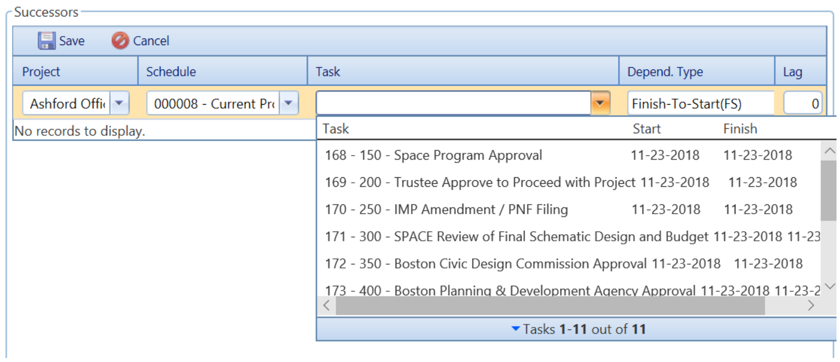


16. In the **Predecessors** section click the *Add* button, a new line appears with five columns, Project, Schedule, Task, Depend Type, and Lag.



Predecessor task list

17. Click the down arrow on the “Task” column, and select the Predecessor task.
18. Click the save button to save the Predecessor task.
19. In the **Successors** section click the *Add* button, a new line appears with five columns, Project, Schedule, Task, Depend Type, and Lag.



Successor task selection list.

20. Click the down arrow on the “Task” Column, and select the Successor Task.
21. Click the save button to save the Successor Task
22. Repeat step 40 through 45 for any other Predecessor and Successor tasks.

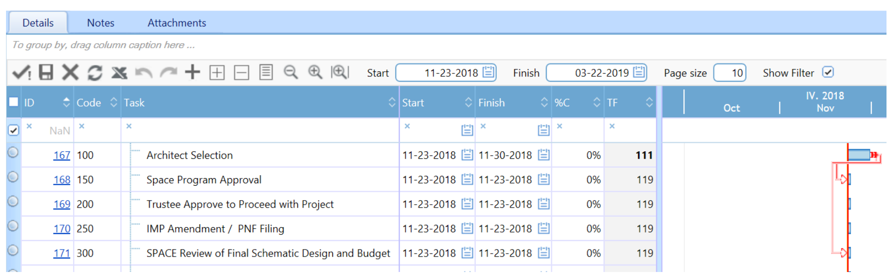


Figure 20 – Updated Task bar with Actual Start and End Dates, and Successor lines.

23. Click the **Save**  to Submit changes to server.
24. Repeat Steps 12 through 23 for all tasks on the list.

Estimates and Budget Requests

The estimates module gives Project Managers a tool to either create a proposed budget, or to request pre-budgeting funds, such as site surveys or Architecture and Engineering. A Budget Request can be generated from an individual line item or the entire Estimate.

The Budget Request is then submitted to Workflow for approvals. Once the submission is approved the requested lines become the original budget.

Creating an Estimate

Follow these steps to create an Estimate in PMWeb.

Steps

1. Use the main menu to navigate to *Planning/Estimates*.

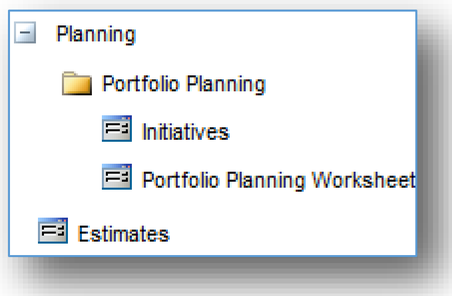
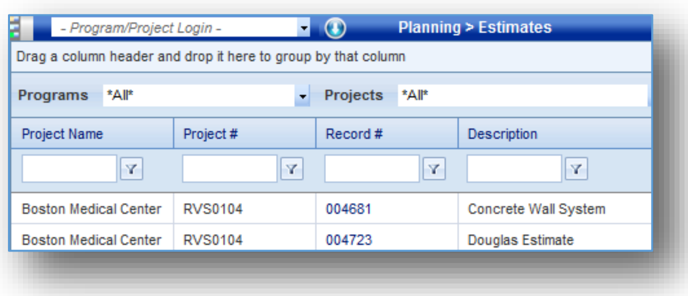


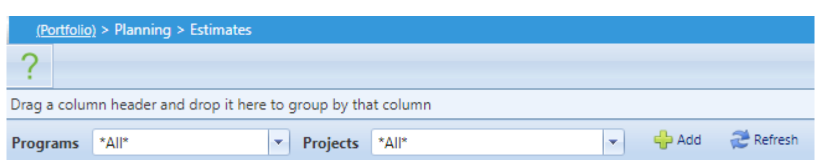
Figure 21 - Planning / Estimates

The **Estimates** page opens.



2. In the menu at the top of the list click the ***Add*** button.

   A blank **Estimate** record opens.



3. In the **Project** field select the Project you wish to create an estimate for.

Power Feature

You can change the **Estimate unit of measure** *and* **Estimate Units** *any time you'd like.*

4. In the **Description** field describe the Estimate.
5. In the **Estimate Unit of Measure** select the Unit of Measure used for the Estimate.
6. In **Category** drop-down select the basis of the estimate, for example “Rough Order of Magnitude (WAG)”
7. In the toolbar click the ***Save*** button. 

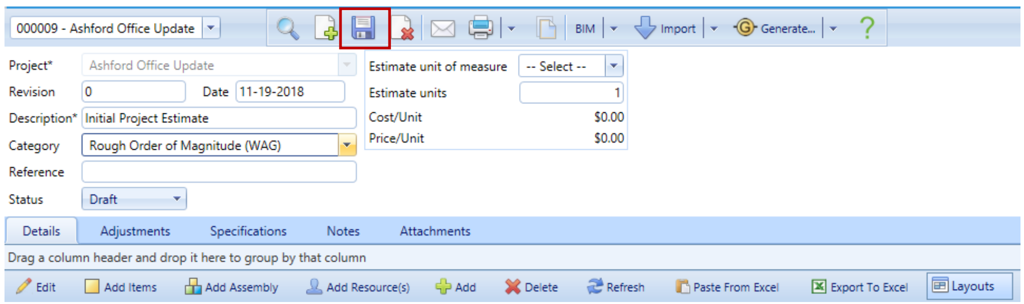


Figure 22 – Completed Boston University PMWeb Estimate screen.

Add Items to an Estimate

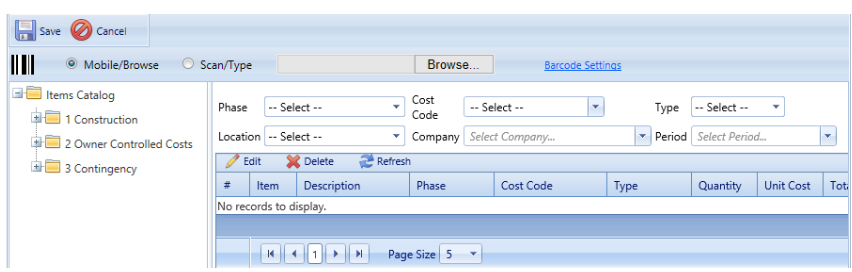
The **Estimate** is made up of **Items** and can either be approved as a whole, or on a per-item basis. PMWeb has an extensive catalog of **Items** representing the *CSI Cost Codes*. The instructions below show how to add those line items to an **Estimate**.

Steps

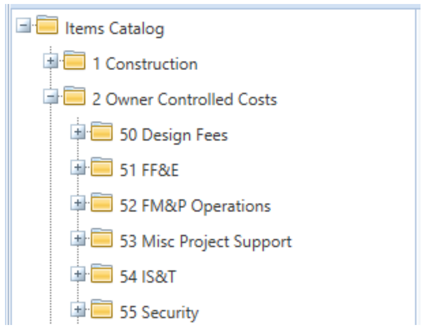
7. In the toolbar of the **Details** tab click the ***Add Items*** button. 

   The **Items** dialog opens.

   Expanding the **Items Catalog** folder shows the general categories that Items are broken into by the type of *Costs* they represent, either Construction, Owner Controlled or Contingency.



8. Expanding, for example, the **Owner Controlled Costs** folder by clicking the plus sign next to it, shows sub-folders that contain all the Owner Controlled Cost Groups, including Design Fees, FF&E, Security, and Insurance.



9. ***Expanding***, for example, the *sub-folder* **50 Design Fees** shows the Design-related cost centers.

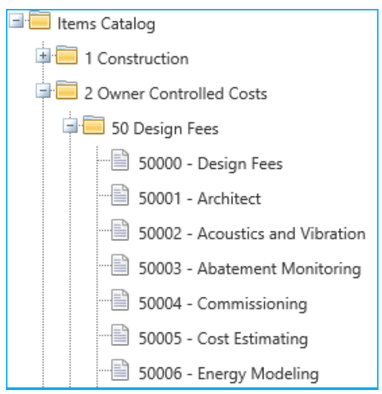


Figure 23 - Expanding the 05 Design Fees Folder

10. Click the appropriate cost item(s) and drag them from the Catalog on the left to the table on the right.

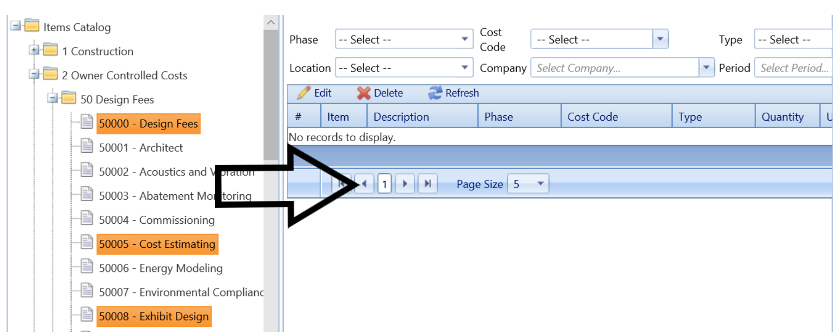


Figure 79 - Drag the Cost Codes you have selected on the left to the table on the right.

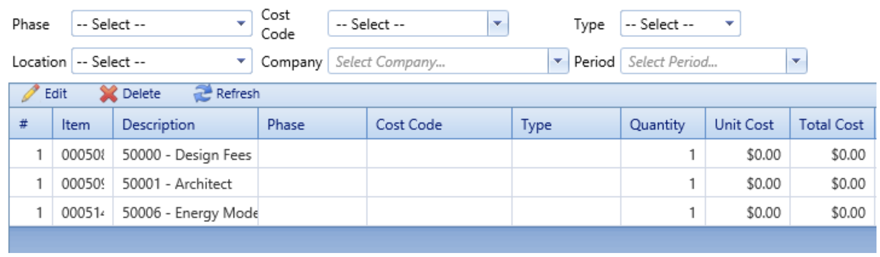
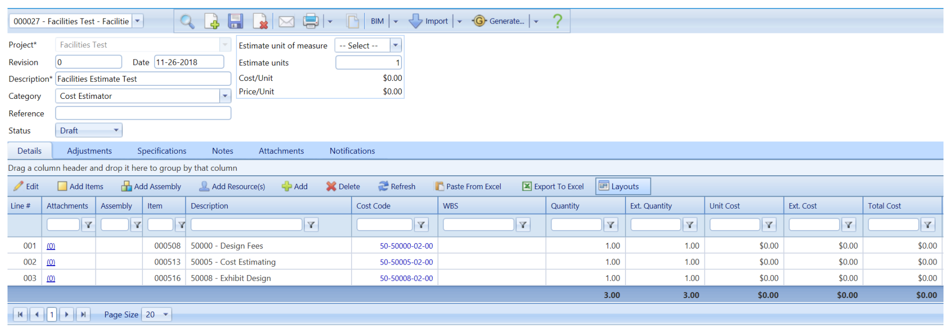


Figure 24 – The Cost codes now appear in the table.

11. Click the ***Save*** button in the Items dialog box. 

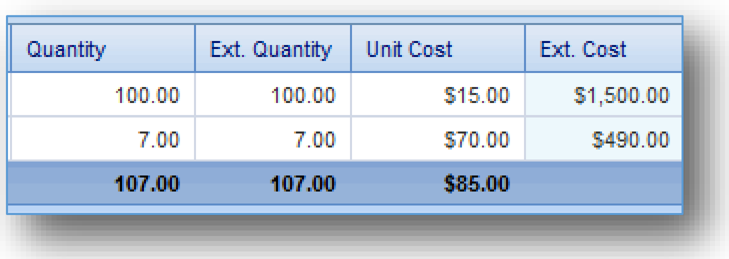
    The **Items** dialog closes and the new items appear in the **Details** grid on the **Estimate**.



Note: If the Cost Codes do not auto populate, open the line for editing, and then click the Cost Code field and search for the appropriate code.

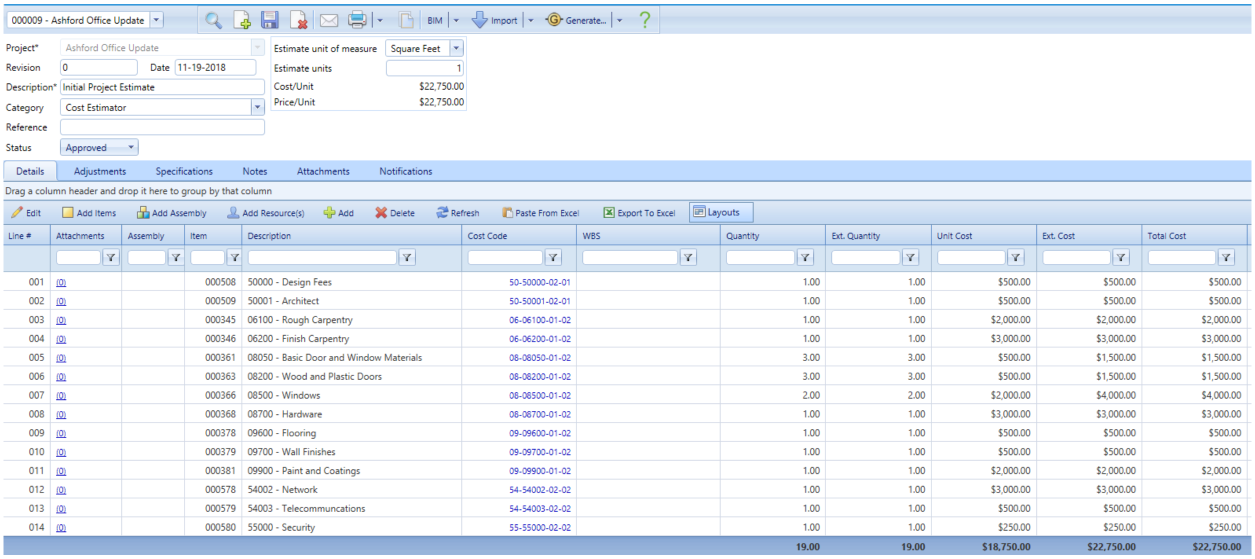
12. Select the items you need to modify and click the *Edit* button.
13. Type the **Quantity** of services or materials you need for the **Estimate**.
14. Type the **Unit Cost** of the Service or material

    Note: When you enter a **Unit Cost** and **Quantity** the system generates an **Ext. Cost**, for instance a **Quantity** of 7 times a **Unit Cost** of $70.00, generates an **Ext. Cost** of $490.00.



Quantity	Ext. Quantity	Unit Cost	Ext. Cost
100.00	100.00	$15.00	$1,500.00
7.00	7.00	$70.00	$490.00
107.00	**107.00**	**$85.00**	

15. In the toolbar of the **Details** grid click the ***Update Records*** button.



Line #	Attachments	Assembly	Item	Description	Cost Code	WBS	Quantity	Ext. Quantity	Unit Cost	Ext. Cost	Total Cost
001	(0)		000508	50000 - Design Fees	50-50000-02-01		1.00	1.00	$500.00	$500.00	$500.00
002	(0)		000509	50001 - Architect	50-50001-02-01		1.00	1.00	$500.00	$500.00	$500.00
003	(0)		000345	06100 - Rough Carpentry	06-06100-01-02		1.00	1.00	$2,000.00	$2,000.00	$2,000.00
004	(0)		000346	06200 - Finish Carpentry	06-06200-01-02		1.00	1.00	$3,000.00	$3,000.00	$3,000.00
005	(0)		000361	08050 - Basic Door and Window Materials	08-08050-01-02		3.00	3.00	$500.00	$1,500.00	$1,500.00
006	(0)		000363	08200 - Wood and Plastic Doors	08-08200-01-02		3.00	3.00	$500.00	$1,500.00	$1,500.00
007	(0)		000366	08500 - Windows	08-08500-01-02		2.00	2.00	$2,000.00	$4,000.00	$4,000.00
008	(0)		000368	08700 - Hardware	08-08700-01-02		1.00	1.00	$3,000.00	$3,000.00	$3,000.00
009	(0)		000378	09600 - Flooring	09-09600-01-02		1.00	1.00	$500.00	$500.00	$500.00
010	(0)		000379	09700 - Wall Finishes	09-09700-01-02		1.00	1.00	$500.00	$500.00	$500.00
011	(0)		000381	09900 - Paint and Coatings	09-09900-01-02		1.00	1.00	$2,000.00	$2,000.00	$2,000.00
012	(0)		000578	54002 - Network	54-54002-02-02		1.00	1.00	$3,000.00	$3,000.00	$3,000.00
013	(0)		000579	54003 - Telecommuncations	54-54003-02-02		1.00	1.00	$500.00	$500.00	$500.00
014	(0)		000580	55000 - Security	55-55000-02-02		1.00	1.00	$250.00	$250.00	$250.00
							19.00	**19.00**	**$18,750.00**	**$22,750.00**	**$22,750.00**

Figure 25 – Estimate Record with all required Fields filled out

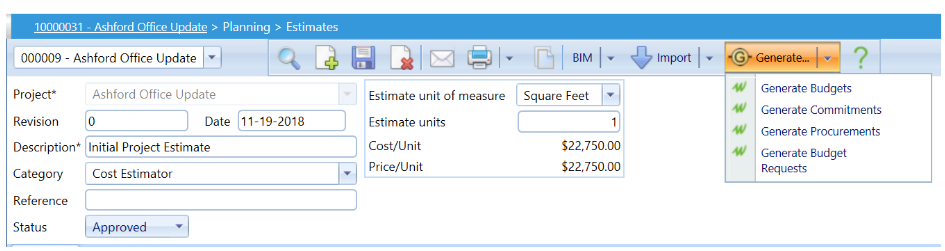
Submitting all or Part of an Estimate for Approval Workflow

Once **Items** have been added to an **Estimate** either the entire **Estimate** or specific Items can be used to generate a **Budget Request** record, which is then submitted to Workflow for Approval. The following steps show you how to generate a **Budget Request**.

Note: Only Items with associated **Cost Codes** can be submitted to Workflow. If you do not have **Cost Codes** associated with the Items in your **Estimate**, you must manually add them prior to generating a budget request.

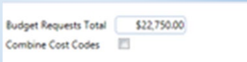
Steps

a. Change the status of the Estimate in the header from "Draft" to "Approved", and then save the Estimate.In the toolbar of the **Estimate** header click on the down-arrow next to the **Generate** button to bring up the options. Select the ***Generate Budget Requests*** option.

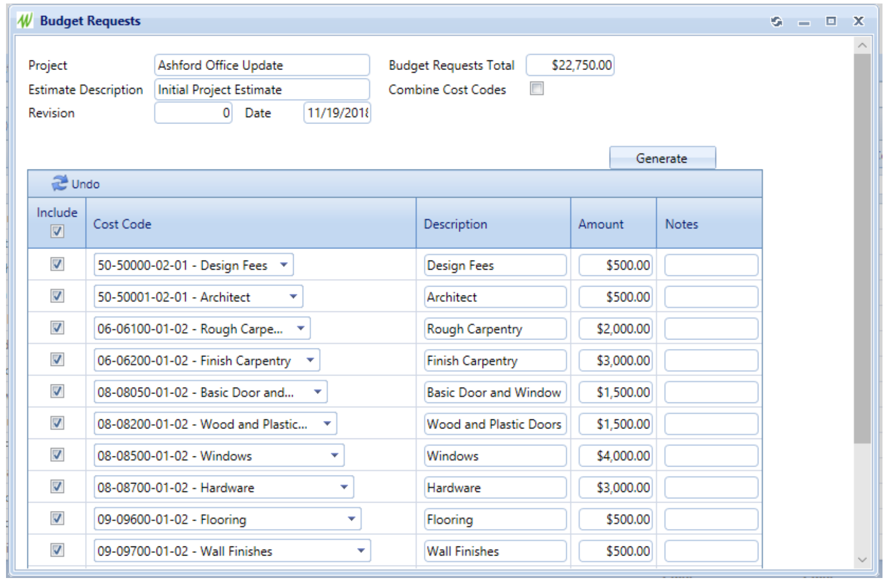


2. The **Budget Request** window will open.

Power Feature



If you click the "Combine Cost Codes" button, any separate lines in your Estimate will be merged into one line for Approval.



3. If you wish to submit all of you Estimate to Workflow, then click the "Generate" button at the top of the list to submit the whole Estimate to Workflow.
    a. If you wish to submit individual lines to workflow, either unclick the check-boxes next to the lines you do not wish to submit, or click the check-box at the top of the list to unclick <u>all</u> the lines, and then click the check boxes next to the lines you wish to submit only.

       Note: You will know that the lines were properly submitted when the green "The action has been successfully completed" message appears.
4. Close the window by clicking the "X" in the upper-right corner.

Budget Requests – Submitting to Workflow

5. Once you have generated your **Budget Request** use the menu to navigate to *Cost Management/Budgets/Budget Requests.*
6. In the list that appears, open the **Budget Request** that you just created.
7. Link the Estimate to the Budget request for easy reference.
    a. Click the "Attachments" tab.
    b. Click the "Link PMWeb Record(s)" button above the attachment list.
    c. Expand the "Planning" folder.
    d. Expand the "Estimates" folder.

e. Locate your **Estimate** and click-and-drag it to the list on the right.

f. Click the blue Save on the bottom of the Page.

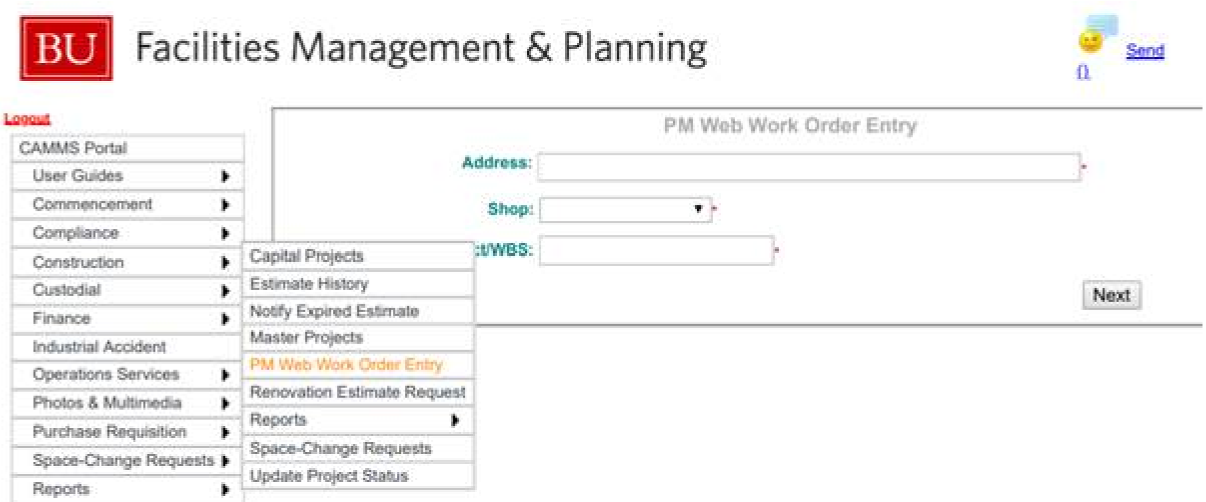
8. Click the “Workflow” tab.
9. Click the “Submit” button.
10. In the “Comments” section type any Comments or notes that you would like to provide to the next Approver in the Workflow.
11. Click the “Save” button to submit the Request to Workflow.

    Note: Once the Budget Request has been submitted to Workflow it cannot be modified unless it is sent back for revision by one of the Approvers in the Workflow.

    Note: You can check the status of the Approval Request by viewing the list in the “Business Process” section in the Workflow tab.

Work Order (FSR) Entry

Work Orders for PMWeb-based Projects are still being processed through CAAMS. Follow the screenshot below to find the **PMWeb Work Order Entry** link.



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 Budget as they are submitted by the vendors.

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.
   b. **Budget Description** – The Description of Cost Code.
   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.
   d. **Approved Budget Changes –** Any Change Orders that have been approved for this Budget Line.
      Note: Change Orders are being implemented in Phase 2 of the PMWeb Project and will not be available in the current release.
   e. **Current Budget** – The Approved Original Budget Plus the Current Budget

   Note: The remainder of the Dollar value fields on this Worksheet will not be used until after Phase 2 of the PMWeb Implementation process.

   f. **Committed** - The total of Approved Commitments against the Line Item.
   g. **Commitments Pending** – The total amount of unapproved Commitments against the line.

h. **Budget Remaining** – The total budget minus the total amount of Approved Commitments
i. **Division –** The Number from the Cost Code
j. **Phase –** The Project Phase from the Cost Code.

5. 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.
6. 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.