DEPARTMENT OF ADMINISTRATIVE SERVICES,
DIVISION OF CONSTRUCTION SERVICES

PMWeb Quick Start Guide Contractor Edition

Revision 2

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CONNECTICUT DEPARTMENT OF ADMINISTRATIVE SERVICES

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PMWeb Overview

Logging In

Overview:

PMWeb is a fully web based application and can be opened from any computer with internet access. It designed to run on most internet browsers, but we recommend Chrome or Firefox.

DCS URL http://dpwpmweb.com/PMWeb

- Enter you User ID and password **(1)** [There is only one database for DCS = CTDPW]

Golden Rule with PMWeb: *Save Early, Save Often.*

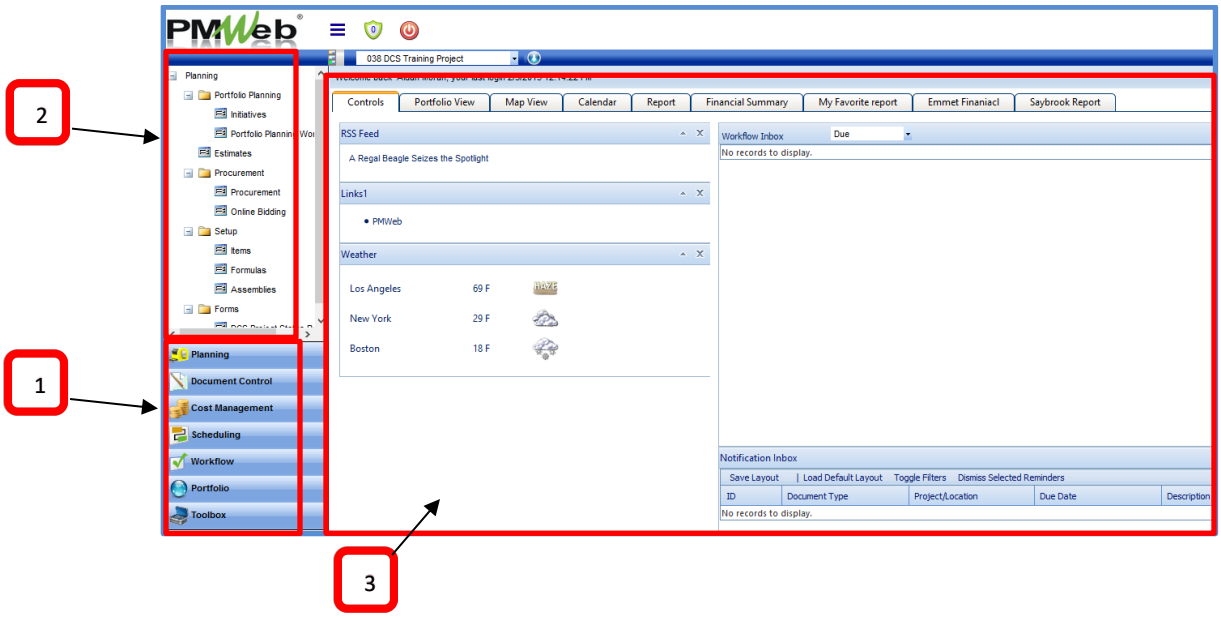
A lot of data being entered is being lost simply because people move onto another screen without first saving their work. So please make sure you save your work as often as you can.

PMWeb Overview

Basic Navigation

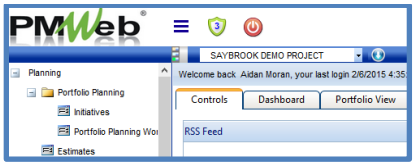
Overview:

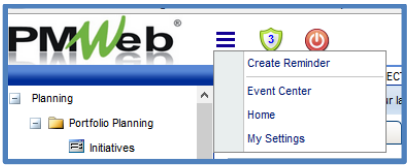
On the lower left hand side of the screen you will see the various PMWeb Modules you have access to **(1)**. When you select a Module you will then see a breakdown of all the elements within that module on the top left hand side of the screen **(2)**. The main portion of the screen is a customizable User defined Dashboard **(3)**.



PMWeb Overview

New Navigation Buttons





Under this button there are 4 options:

- Create a reminder
- Event calendar
- Home (i.e. Dashboard View)
- My settings

This button allows you to view your reminders. When there is a notification the 0 will turn into the number of notifications. How to create a reminder will be described on the next page.

Log out button

This button displays or hides the navigation column on the left hand side of the screen

PMWeb Overview

Standard PMWeb Icons

Across the top of each Form you will several standard icons that can help you quickly preform a task or navigate through the software.

Toggles back to the list form

To add a new record

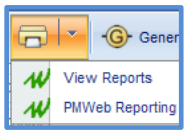
Save data in the Header only

Delete a record

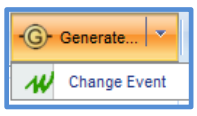
Copy a record

Email or notify someone about a particular record

Export to MS Word



Print Icon – select the down arrow next to the Printer Icon to View Reports. Note: You cannot print directly from PMWeb you have to first save the document as a PDF and then print it.



Some modules allow you to automatically generate another document from another one. In this case you can generate a Change Event (or Proposed Change Order) from an RFI.

PMWeb Overview

Standard Form Tabs

In the detailed section of nearly every form you will see several standard tabs.

Details: – This is where you will edit specific information about the record (e.g. costs details)

Specifications: This is where you can enter custom data items, fields that are specific to the project or your organization (e.g. Project justification). These fields can then be used to populate custom reports.

Notes: This section is where you add specific notes

Attachments: Where you can attach or link to specific documents.

Workflow: If the document has to be submitted into workflow then this tab will appear. This is where the submitter enters the document into workflow.

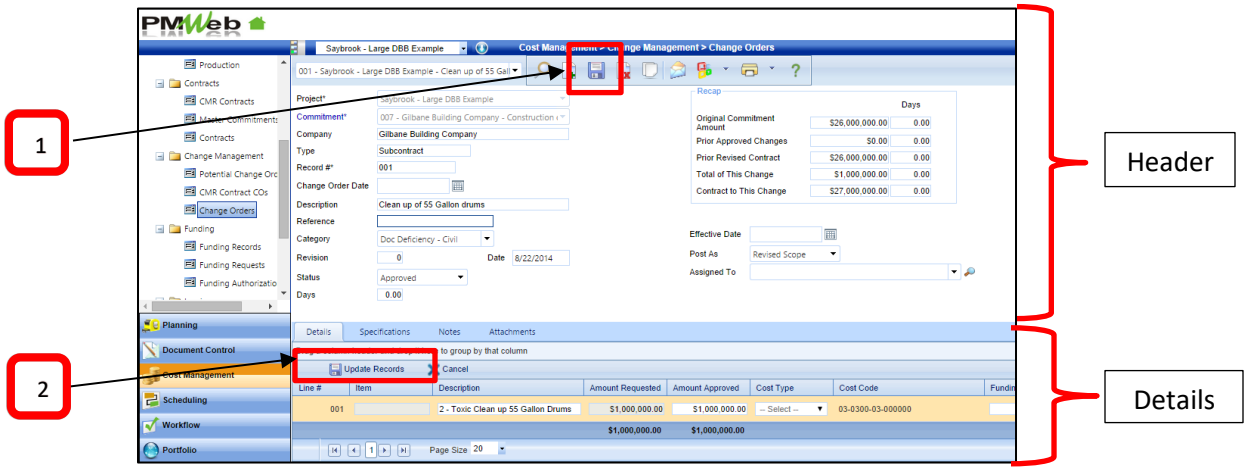
Notifications: This shows a list of all the people who have been notified about the document

Note: If a record is added to any of these tabs a number in brackets will appear against the name of the tab showing how many records there are.

PMWeb Overview

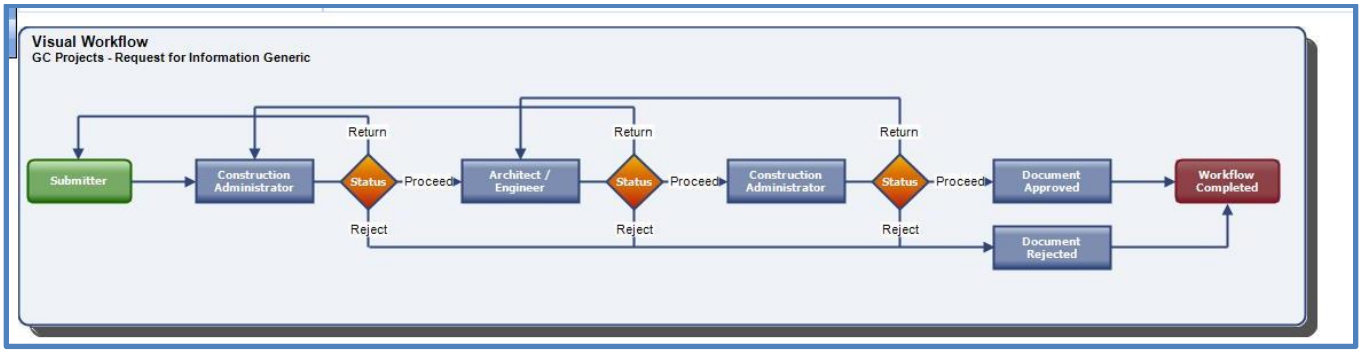
Standard Screens and Workflows

One of the key things to remember about PMWeb is that once you select one of Modules you'll notice that it is in fact split into two sections, a Header on top and a more Detailed view on the bottom. For the most part these screens while they appear to be related are in fact separate forms. So if you modify something in the Header you have to save that data in the Header form **(1)**. Similarly if you modify something in the Detailed section/form you have to save your changes within that form **(2)**. In other words depending in which module your are saving data using the Header Save icon **(1)** may not save your changes in the Detailed section.



PMWeb Workflow:

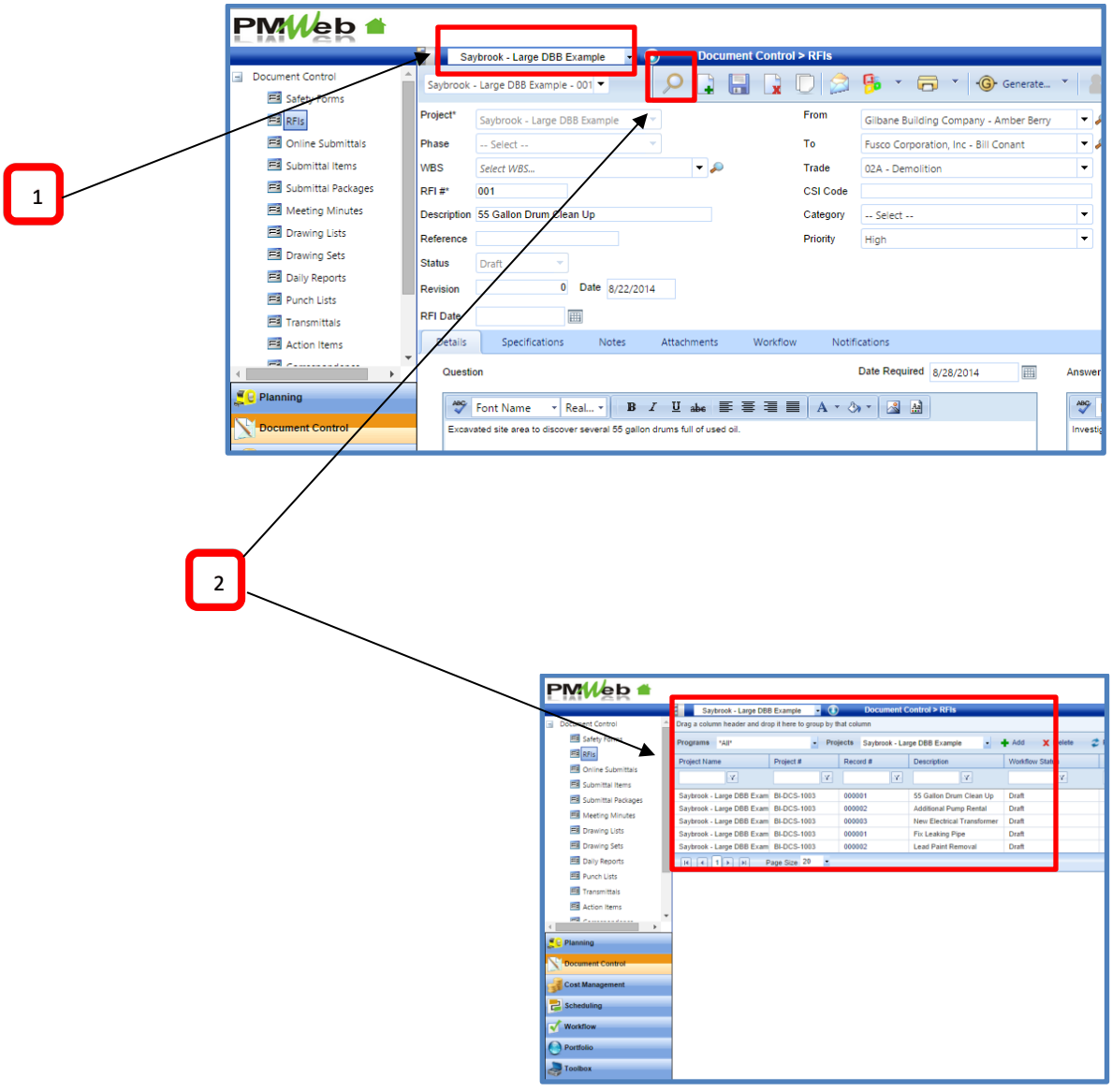
One of the features of PMWeb is the ability to establish dynamic flow charts for electronically routing documents for review or approval to key people on the project. These are called ***Workflows***. Most of these are established by the PMWeb administrator(s) and the Project Team at the beginning of a project. Workflows are mainly used for RFI's and Submittals.



PMWeb Overview

List or Management Screens

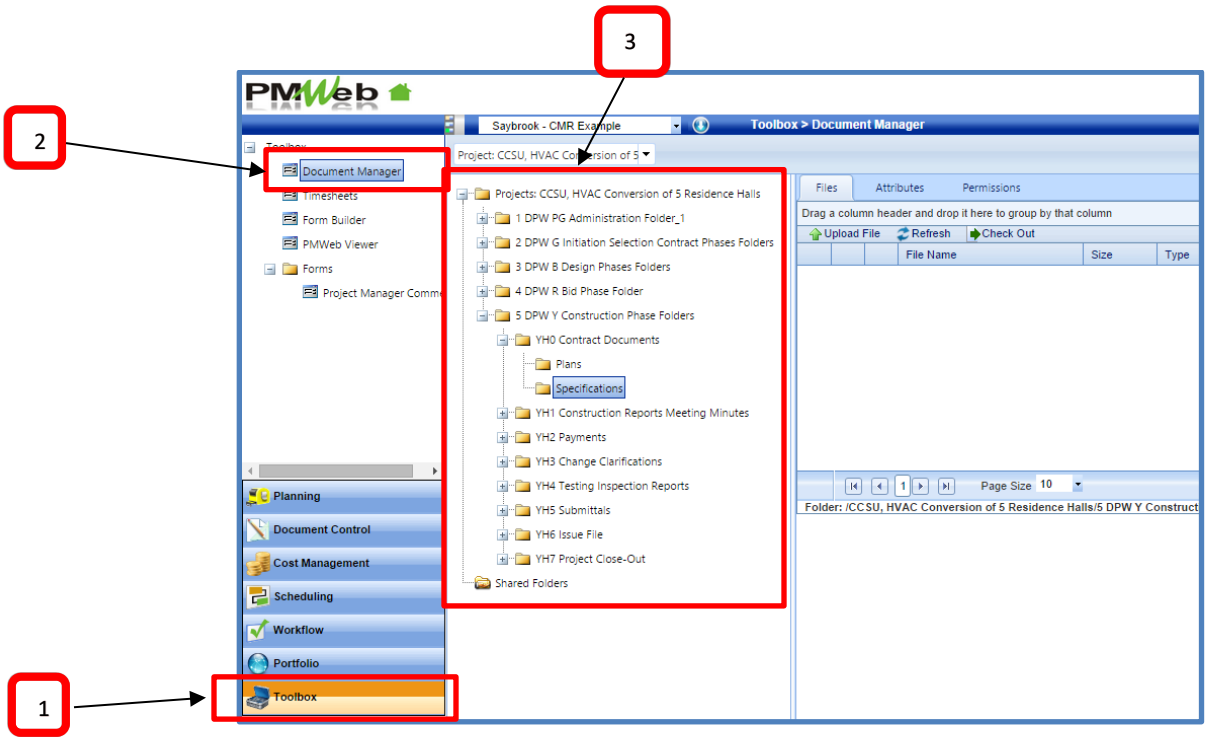
In general if you just want to see data related to one single project then you should enter the name of your project at the top of the screen **(1)**. If you wish to switch to another project then you will have to delete out this entry completely (using the delete or back space keys) and enter the name of the new project. If you are on one particular record in this case a specific RFI and then you wish to see all the RFI's for this project then click on the Magnifying Glass Icon **(2)**.

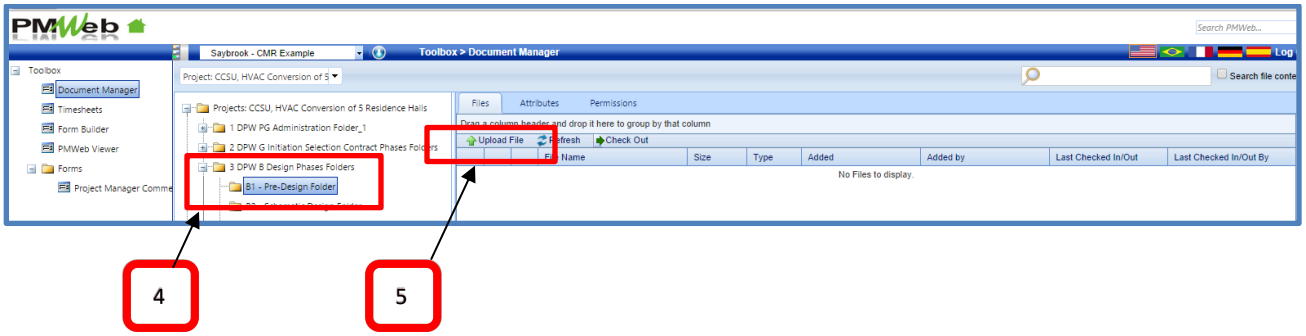


PMWeb Overview

Document Manager

PMWeb is designed to store all the documents associated with a project in one central location. If you select the ToolBox Module **(1)** and then Document Manager **(2)** at the top left hand corner, you will then see the standard folder structure for storing any documents related to the project in the center section of the screen **(3)**.





To upload a file into a folder, just highlight the folder you want to upload into **(4)** and then select Upload File **(5)**

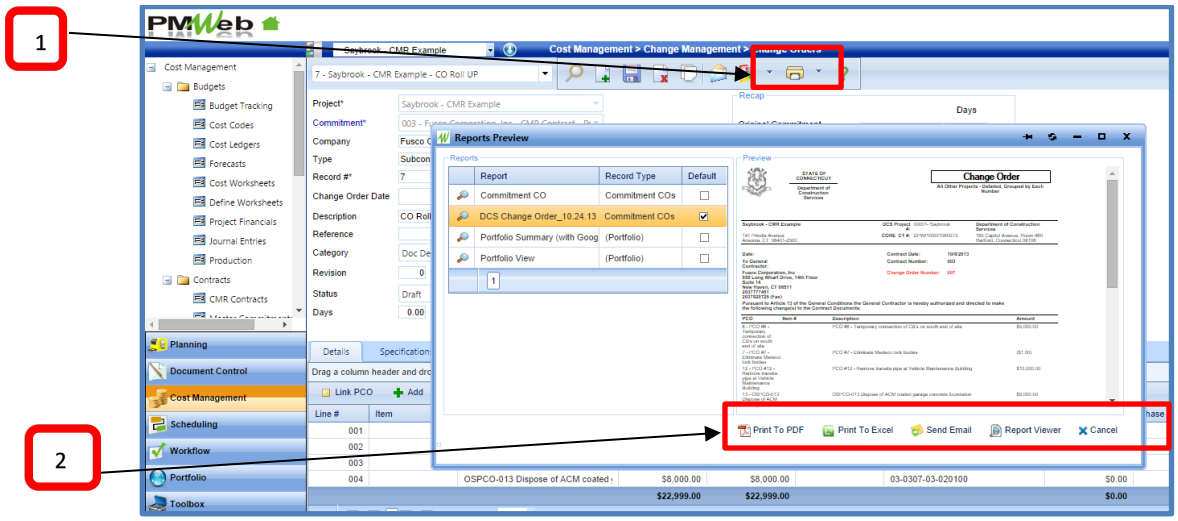
Note: You have the ability to add additional folders by selecting any existing folder, then simply Right Clicking on the Mouse and select New Folder

PMWeb Overview

Printing Reports

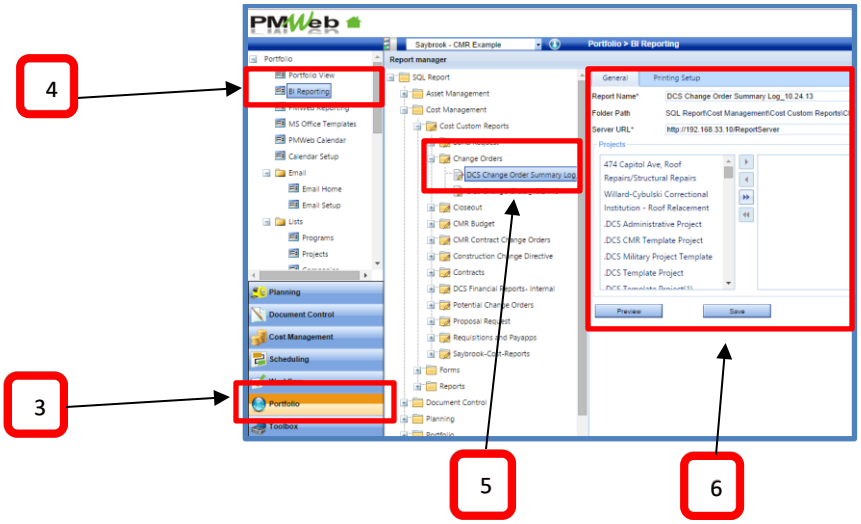
Option #1:

Once you are in a Module you can go directly to the reports for that particular module by simply clicking on the Printer Icon **(1)** and selecting View Reports. A pop-up widow will appear with all the reports for that particular module. You can then decide in what format to print it to **(2)**.



Option #2:

From the Portfolio Module **(3)** select BI Reporting **(4)**. Then all the report folders and reports will appear **(5)**. After you select and double click on the report you want the report selection criteria will appear **(6)**. Once you select a project or group of projects just click on the preview button.

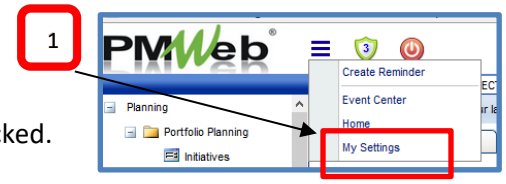


PMWeb Overview

Printing Reports - continued

Option #3:

You can configure a tab to run a report. If for example you have to run a few reports every week or month you may want to decide to set them up here for convenience.



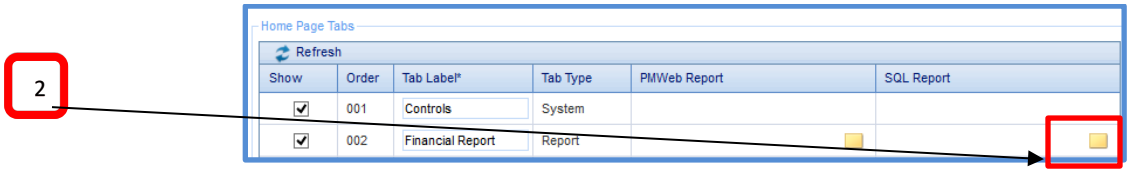
Step #1: Click the ☰ icon and then click on My Settings **(1)**.

Step #2: Under the Home Page Tabs. Make sure the tick box is checked.

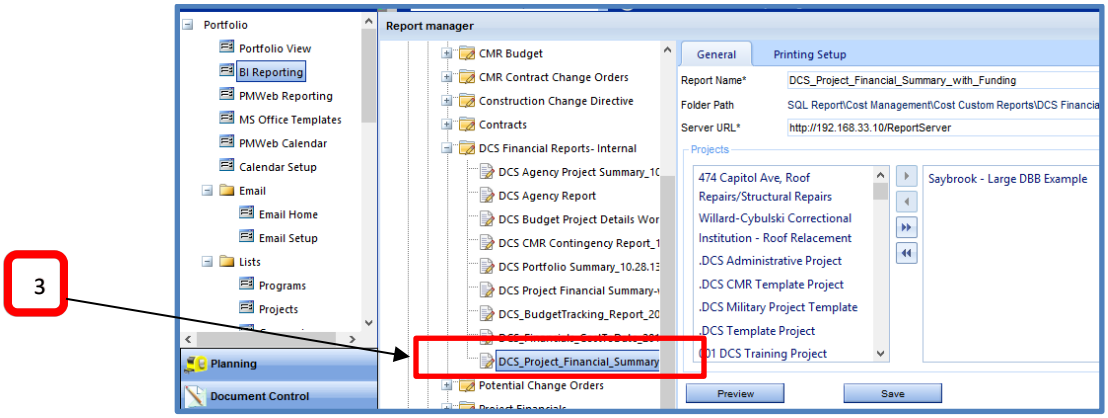
Step #2: Under description type in the name of the report

Step #3: Select tab type as Report

Step #4: Click on the yellow square under SQL **(2)**.



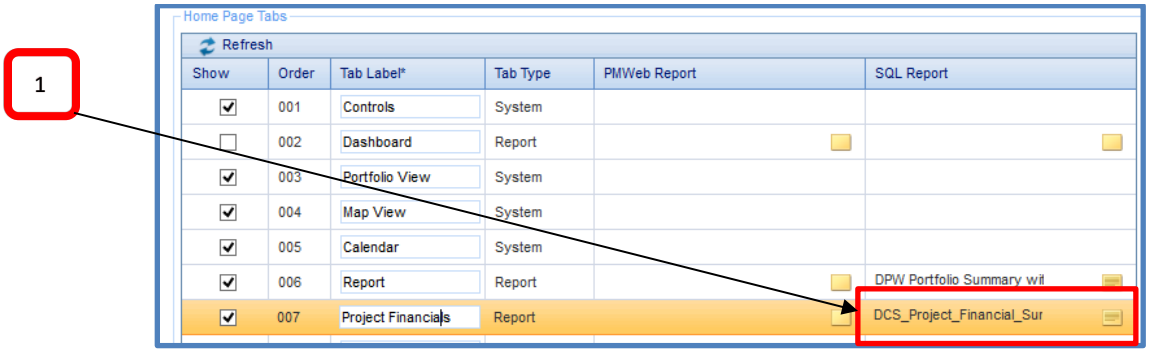
Step #5: Under Portfolio -> BI Reporting select the report you want and also define what project(s) you want to run the report for. Save & close. **(3)**.



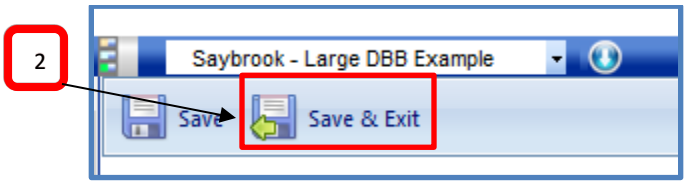
PMWeb Overview

Printing Reports - continued

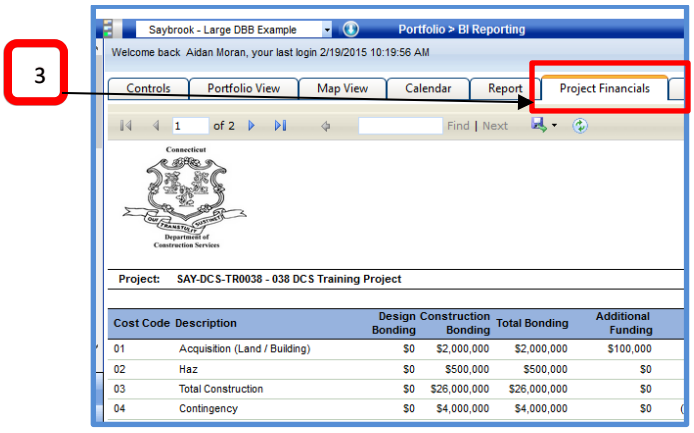
Note: that once you add the report, the name of the report will show up next to the yellow square **(1)**.



Step #6: To save your dashboard and view it don't forget to save & exit **(2)**.



Step #7: Now at the top of the page a new tab will appear (in the example called dashboard) when you click on the Project Financials tab the report will run automatically **(3)**.

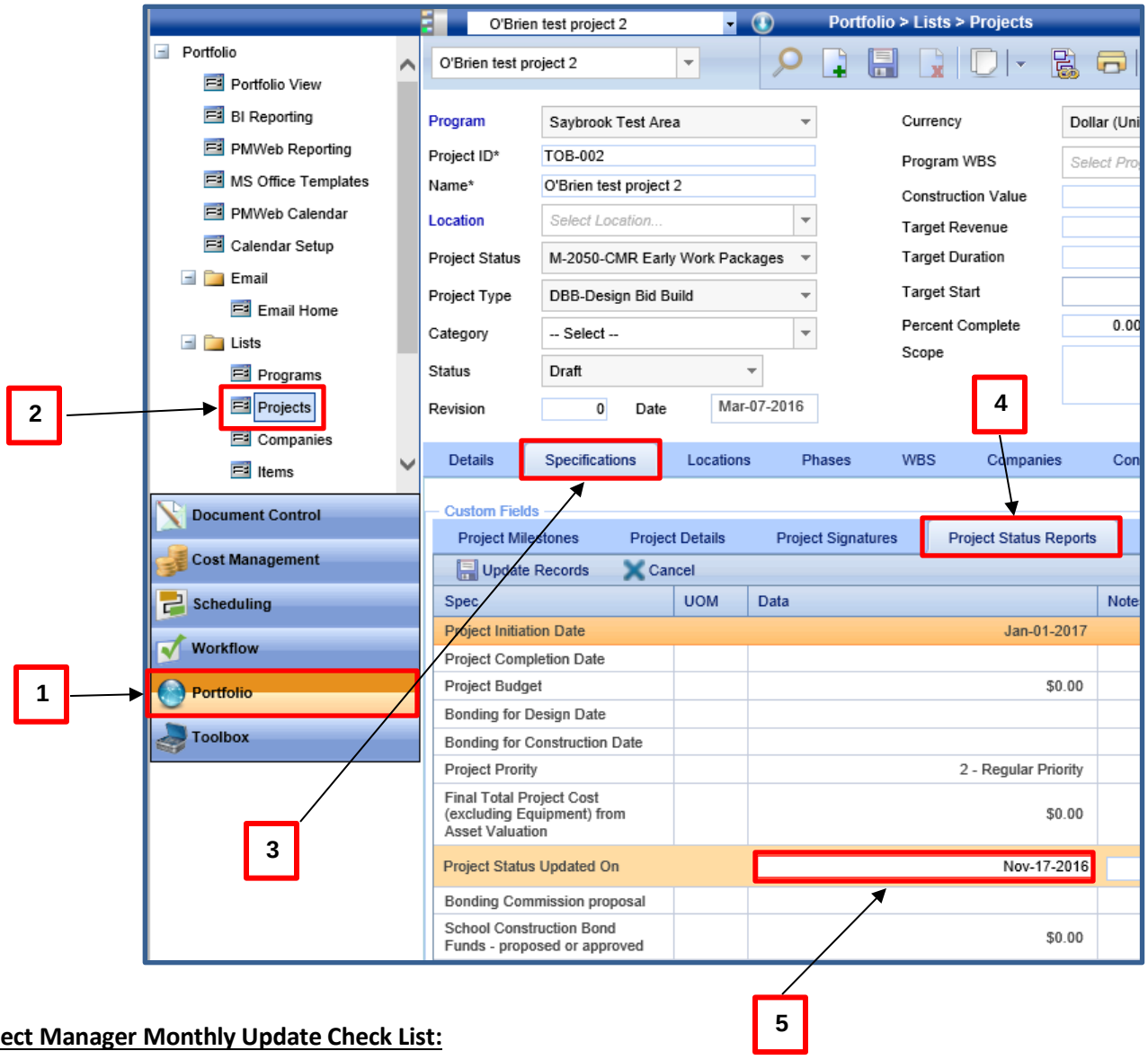


PMWeb Overview

Monthly Update Cycle

It is expected that each project is fully updated and current by the last Friday of each month. This includes all cost data, schedule updates and the addition of any PM comments. After the Project Manager (PM) has reviewed their project in PMWeb, they need to update the date in ***Project Status Updated On*** Field **(5)**.

This field is found under the Portfolio Module **(1)** -> Projects **(2)** -> Specifications Tab **(3)** ->Project Status Tab **(4)**



Project Manager Monthly Update Check List:

a) Review and Update the Project Milestones Form
b) Review Costs and complete any Contingency Transfers.
c) Update Overall Project Status
d) Update Project Comments
e) Updated On" Field

PMWeb Overview

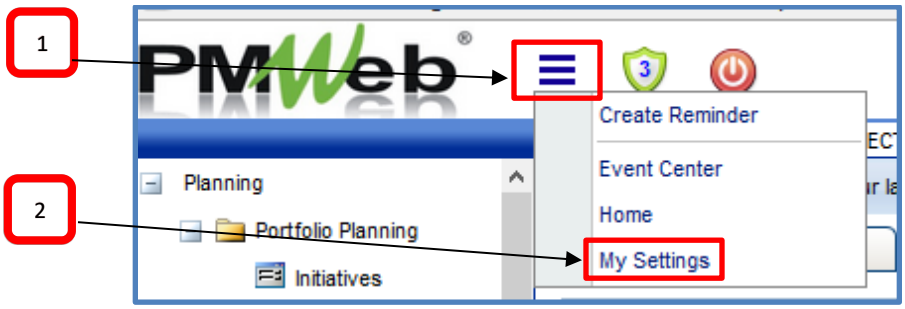
Recommended User Settings

To personalize your settings:

If you need to personalize your settings or to modify your password, you can do this:

Step #1: Click the ☰ icon **(1)**

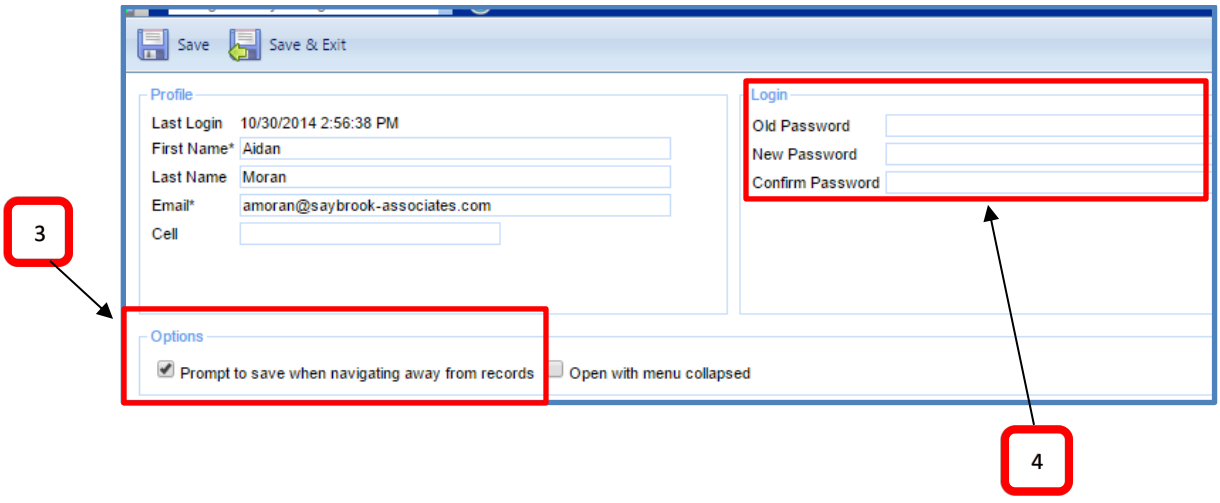
Step #2: select My Settings **(2)**



Prompt Save and Password Modification:

It is strongly recommended that Users select the option listed below to have PMWeb automatically prompt you to save your updates/changes before you leave a particular form or screen **(3)**.

If you want to update or modify your password you can do so from the same screen **(4)**



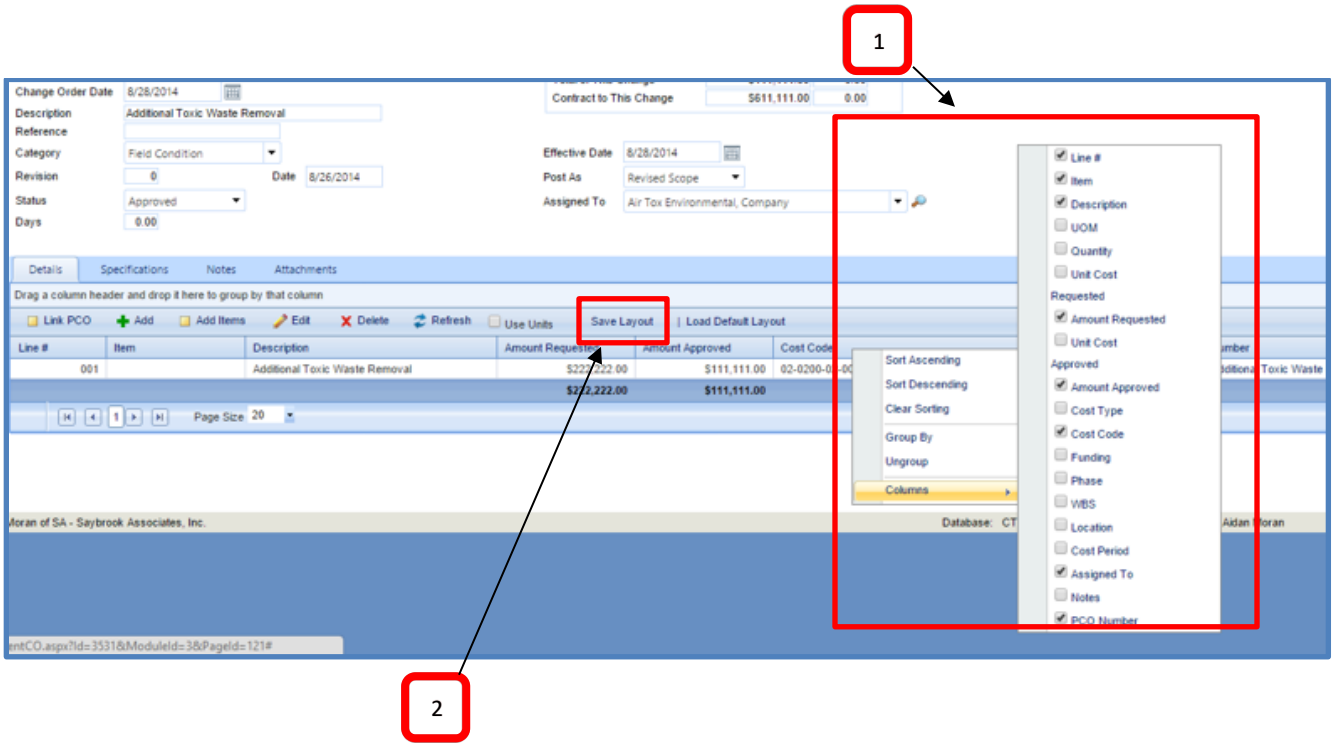
PMWeb Overview

Customizing Layouts

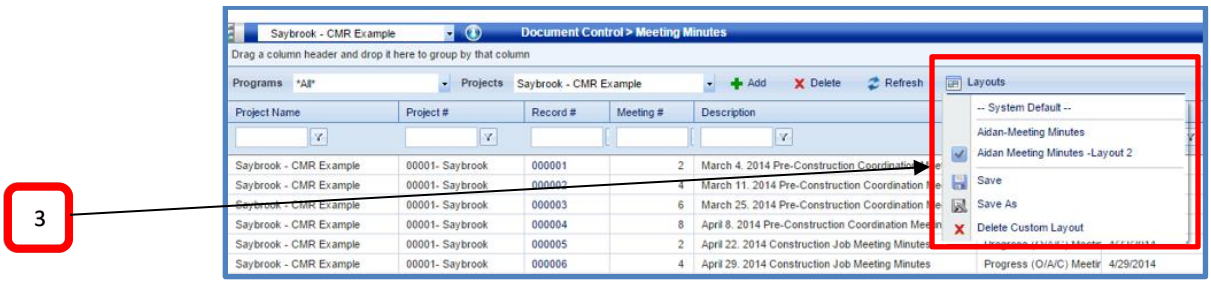
To customize a layout:

PMWeb allows each user to hide any data fields that they do not use or that not required. If you right click the mouse on the column header and select Columns -> you can then turn on or off which columns you want to display **(1)**. Once you are satisfied with your selection make sure to Save Layout **(2)**. This way PMWeb will remember the columns you have selected the next time you return to that screen.

Note: If at some point you select the Load Default Layout, PMWeb will delete your customized layout so you will have to manually reset it.



In the Headers you can create multiple layouts for the same form /module which you can switch back and forth on **(3)**.

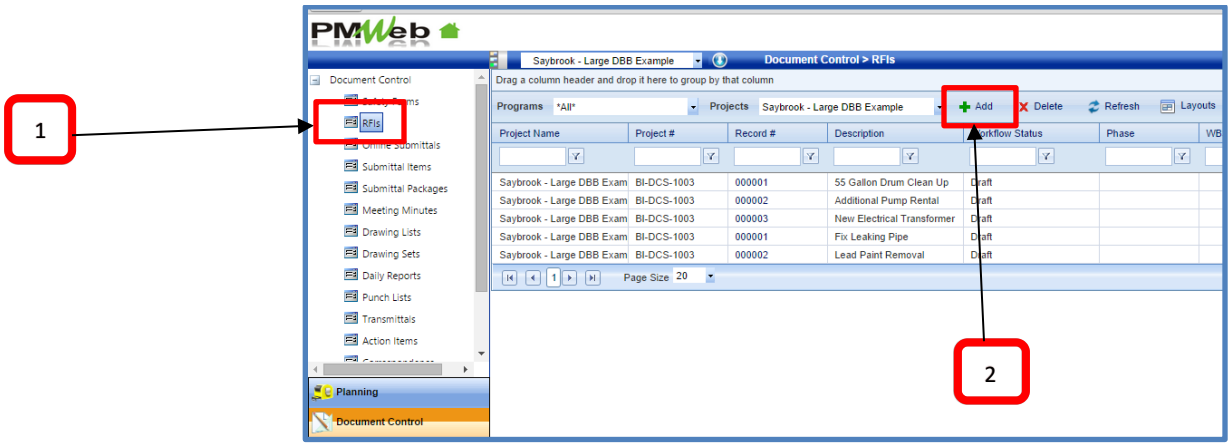


Document Control Module

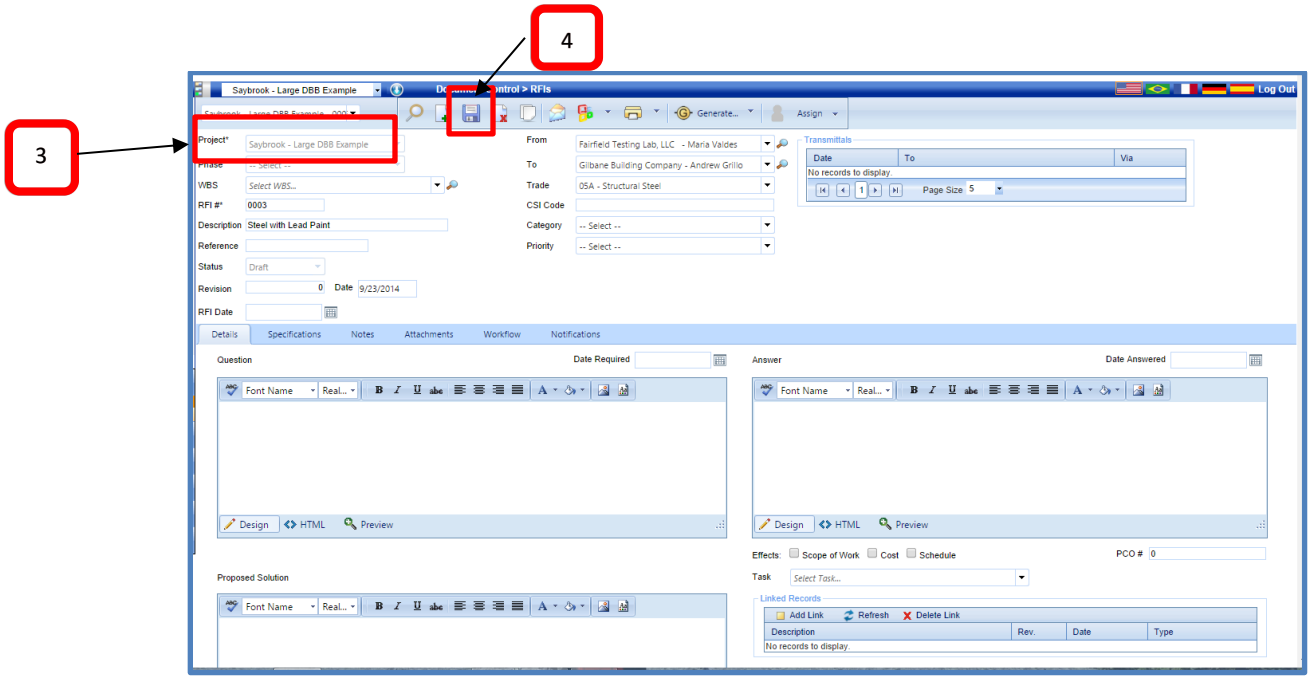
Creating a Request for Information (RFI)

Overview:

In Document Control, Select RFI's in the Top left hand section **(1)**. Then click on the Add button **(2)**.



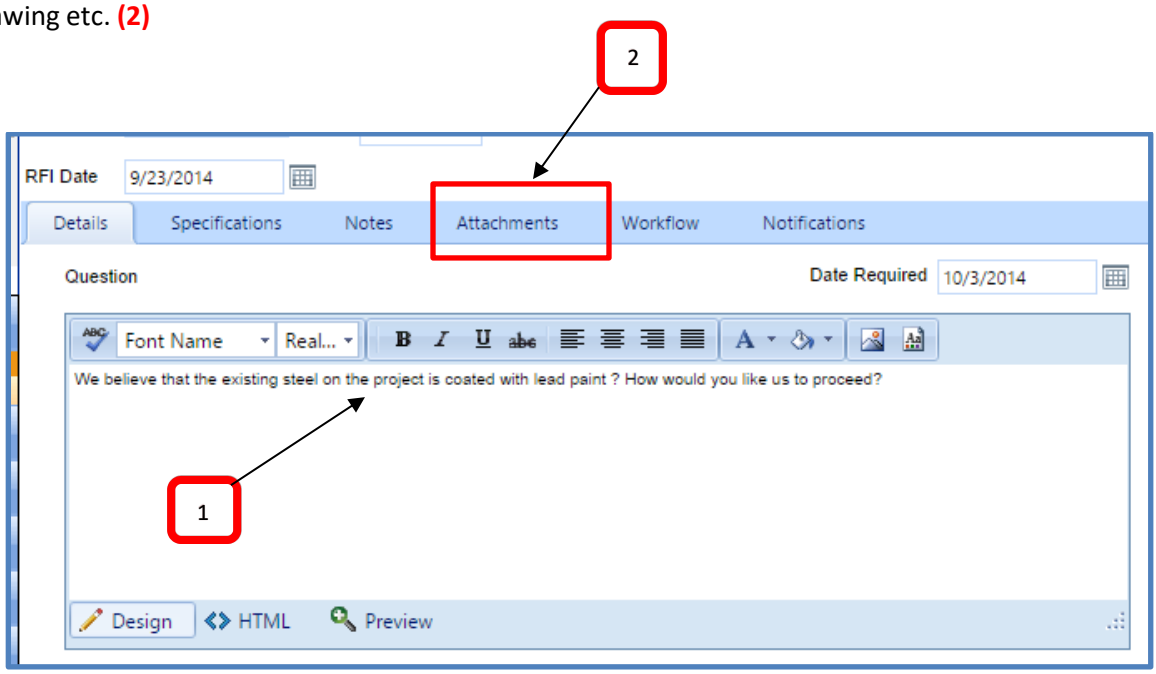
You have to Select the Project first **(3)** and then you can fill out the other details. Save the RFI **(4)**



Document Control Module

Creating an RFI- continued

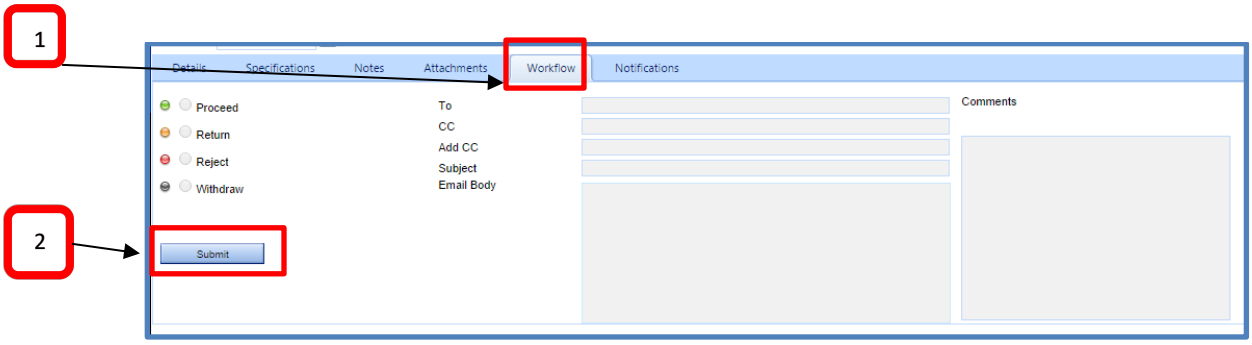
In addition to asking a question **(1)**, you also have the option of adding additional information such as attaching a marked up drawing etc. **(2)**

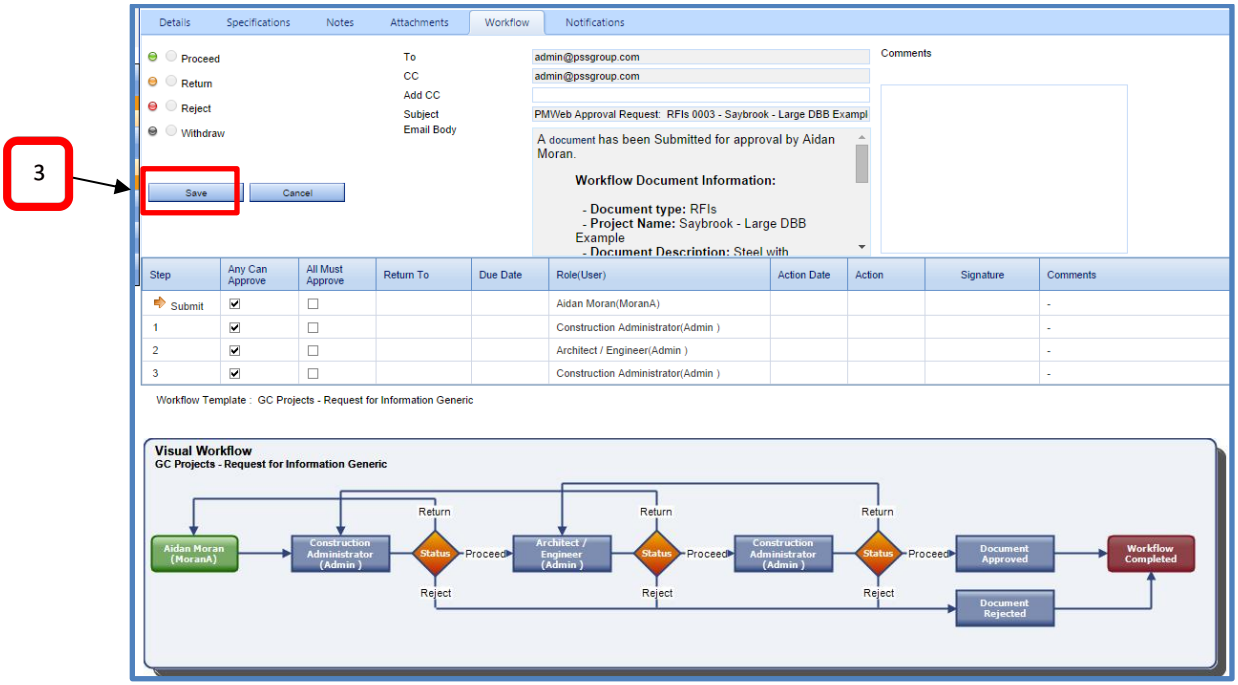


Document Control Module

Submitting an RFI into Workflow

Once you have completed the RFI you have to save it in order to see the Workflow tab. Select the Workflow Tab **(1)** and then click the Submit button **(2)**. This will expand the Workflow screen and included the Workflow graphic. To start routing the RFI just click on the Save button **(3)**.

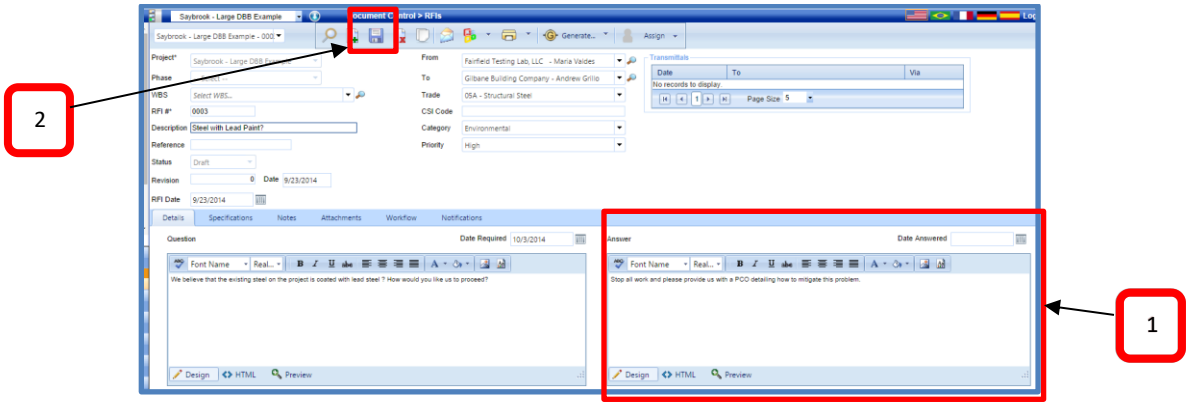




Document Control Module

Routing an RFI through Workflow- Continued

The next person in the RFI Workflow process will be automatically notified and they are expected to review the RFI and to respond to the issue in the Answer section **(1)** and then SAVE the RFI **(2)**



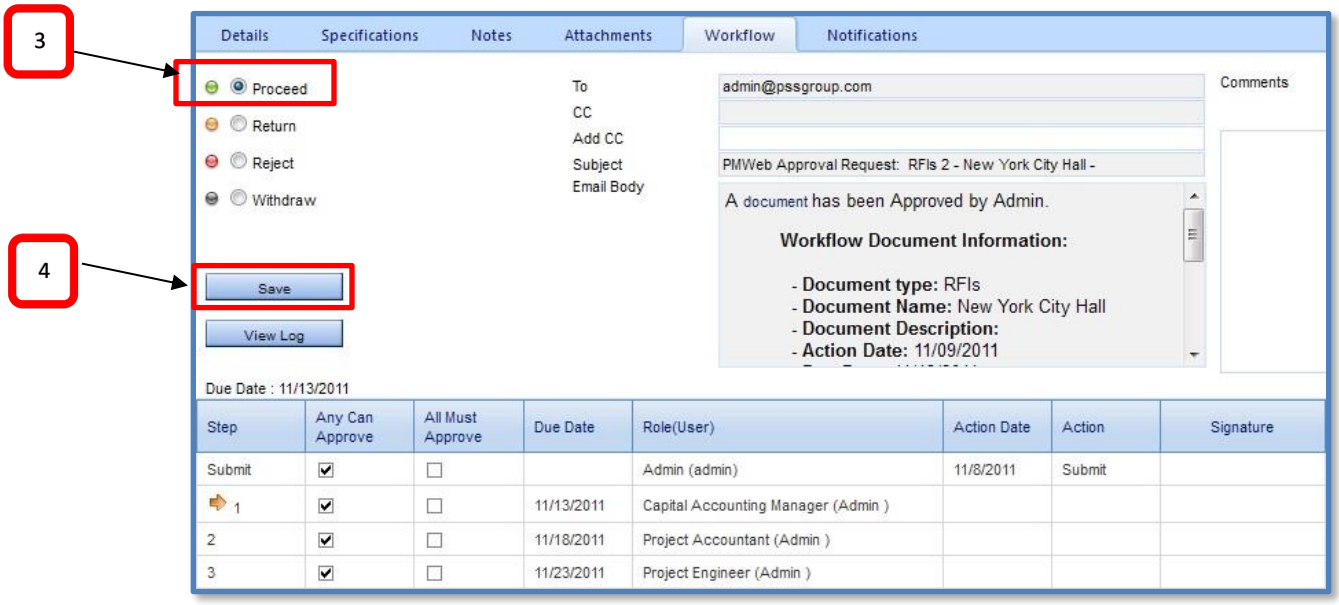
From the Workflow Tab the User has several choices:

a) Proceed **(3)** + SAVE **(4)** – this routes it to the next person in the process

b) Return + SAVE – this sends the RFI back to the last person in the process

c) Reject + SAVE – Try not use this as this will basically "kill" the RFI, locking the record so no one can edit or modify it.

d) Withdrawal + SAVE – Again try and use this as little as possible as this too will "kill" the RFI record.



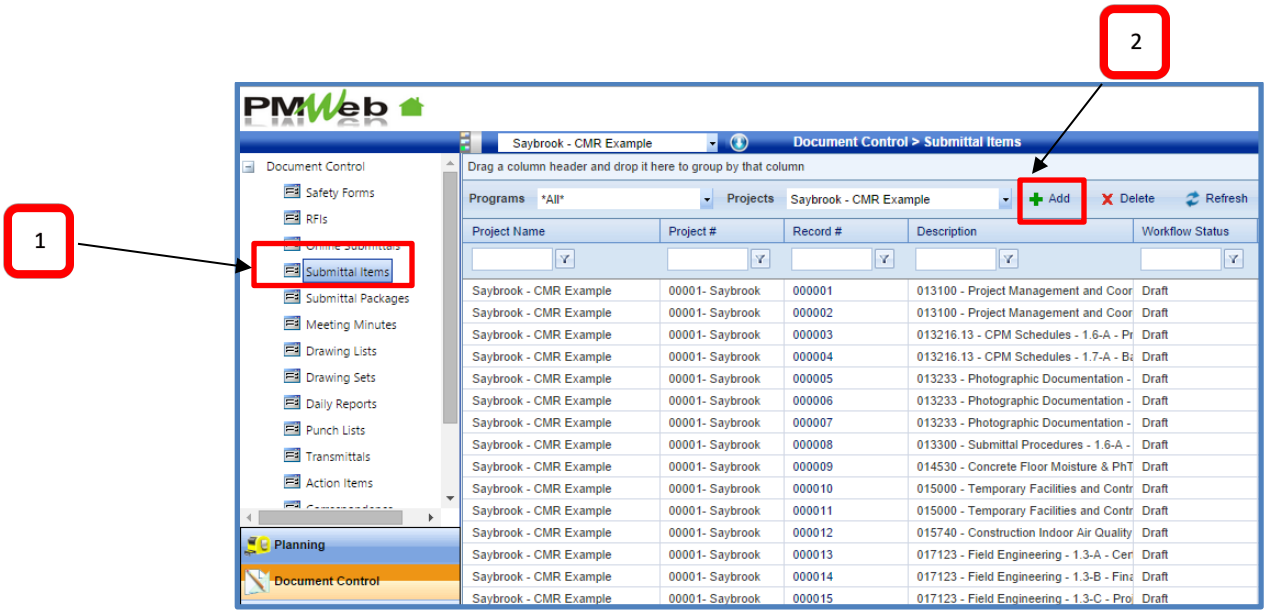
Document Control Module

Submittal Items

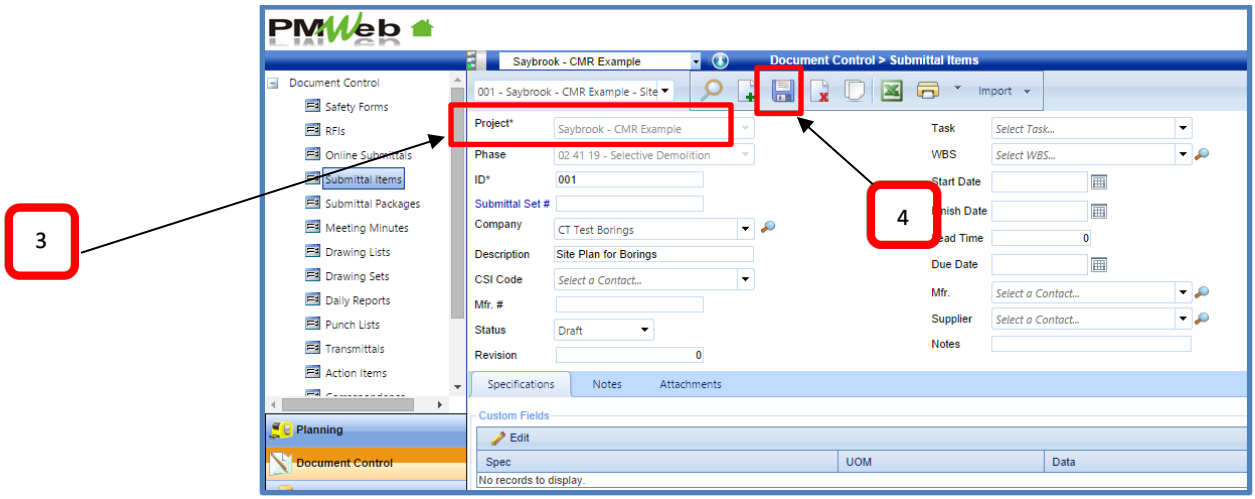
Submittal Items: This should be used simply as a check list of all the required submittals for the project. This list should be created at the start of a project and can be used to compare what has been actually submitted in the Submittal Package module to ensure that everything has been submitted. These can be entered using two different options:

Option #1: Enter Submittal Items individually.

In Document Control, Select Submittal Items in the Top left hand section **(1)**. Then click on the Add button **(2)**.



You have to select the Project first **(3)** and then you can fill out the other details. Save the Submittal **(4)**

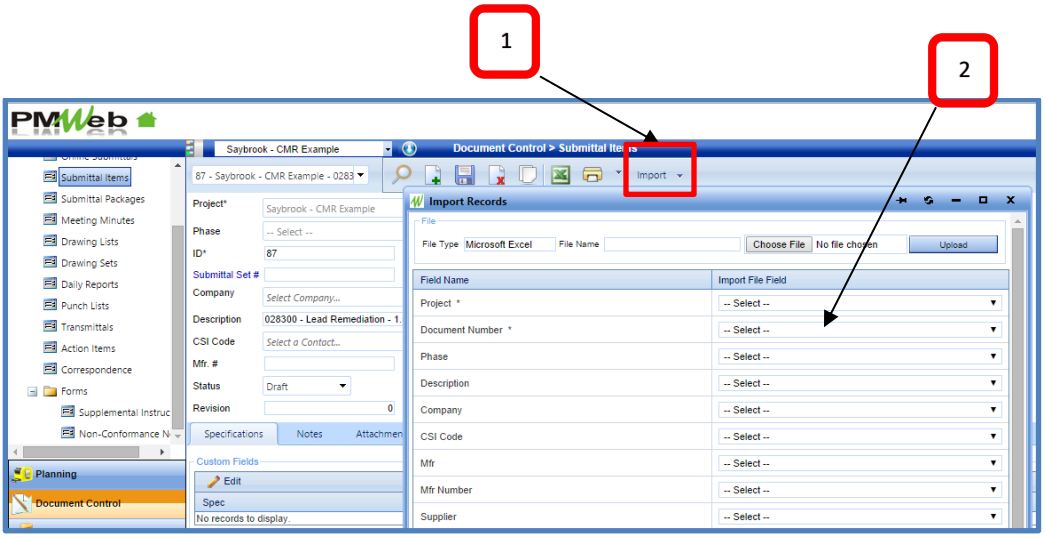


Document Control Module

Submittal Item (continued)

Option #2: Import list of submittals from Excel.

PMWeb allows you to import the list fo submittals directly from Excel. First choose the Import option at the top of the screen **(1)**. This will open a pop up menu asking for the Excel file location and most importantly the mapping of the fields in your Excel spread sheet to the fields in PMWeb **(2)**.

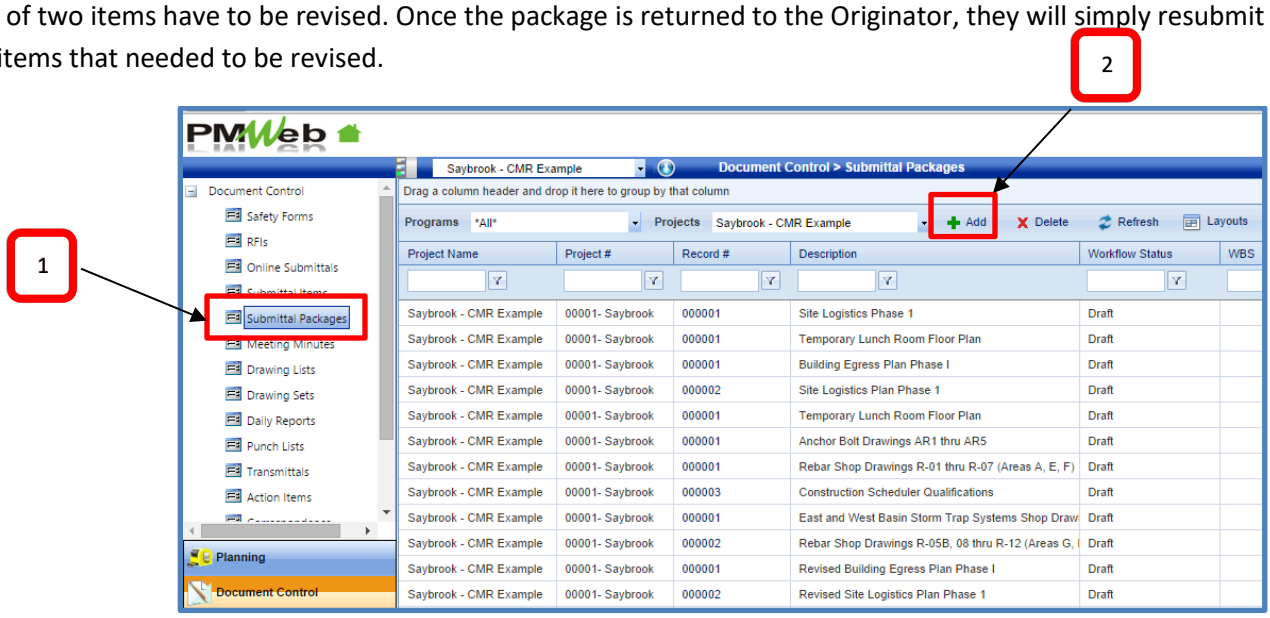


Document Control Module

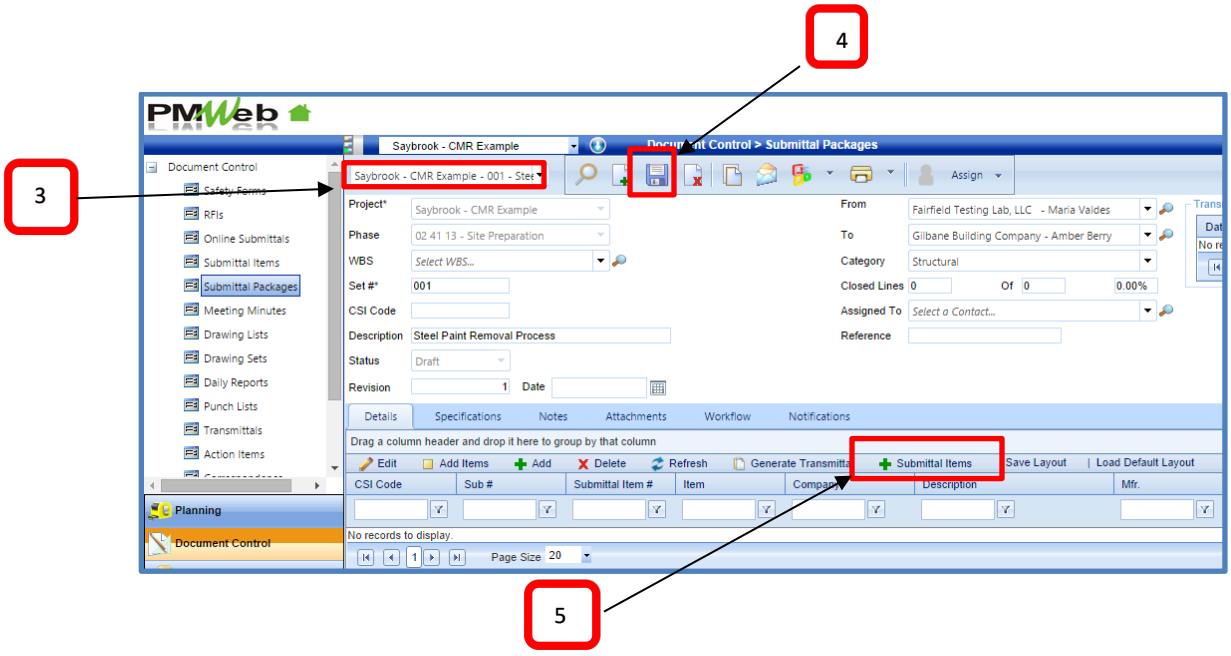
Submittal Packages

All submittals should be entered as a Submittal package.

Golden Rule: Most submittal packages will probably contain more than one item. There may be instances where some of the items contained in the package will have to be revised. In these cases the package should still continue to move forward through the workflow process. We do not want to hold up an entire package because of one of two items have to be revised. Once the package is returned to the Originator, they will simply resubmit those items that needed to be revised.



You have to select the Project first **(3)** and then you can fill out the other details. Save the Submittal **(4).** If you want to "bundle" individual Submittal Items into this Submittal package then select Submittal Items **(5)**

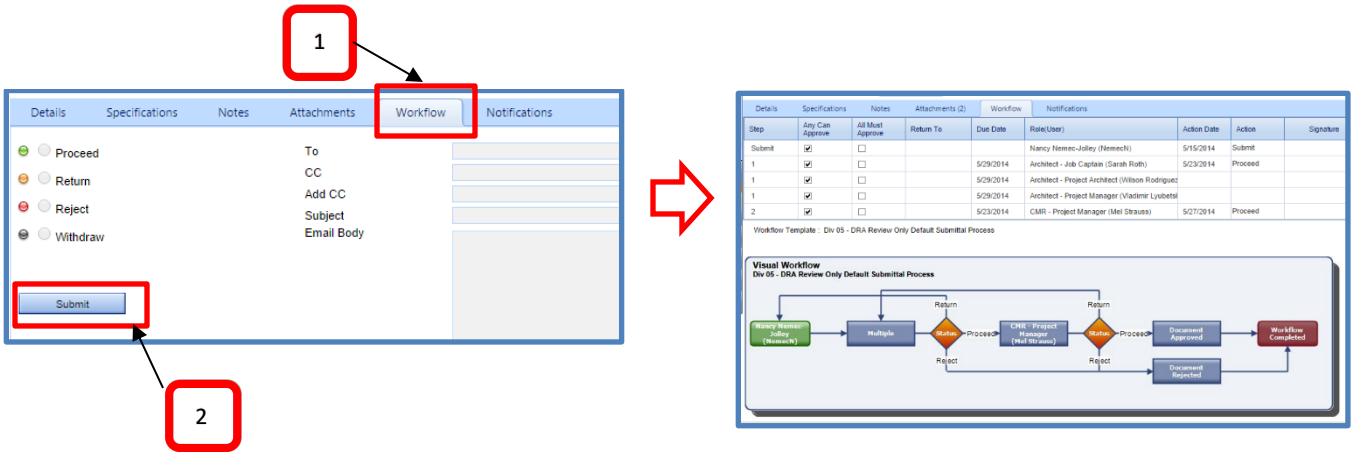


Document Control Module

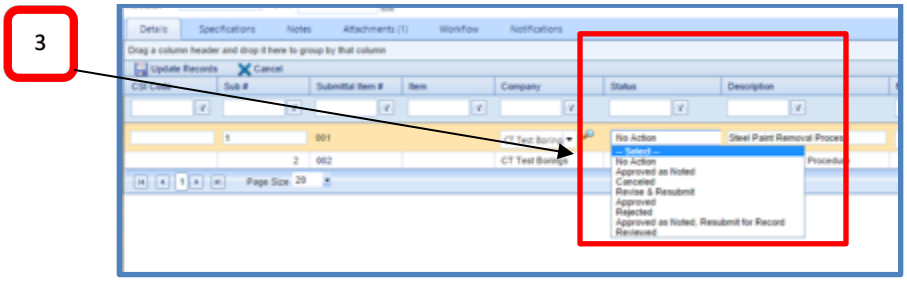
Routing the Submittal Package through Workflow

Overview:

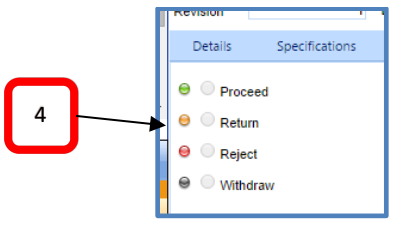
Once you are ready to submit your Submittal Package for review you will click on the Workflow Tab **(1)** and then select Submit **(2)**. Again somewhat similar to the RFI Workflow Process the Submittal Package gets automatically routed to the correct people for review.



If you are someone that has to review a submittal then after you reviewed it you must update the status **(3)** of each submittal line item



As with the RFI workflow process you then have to select one of the flowing options to either send the submittal package back or move it forward **(4)**

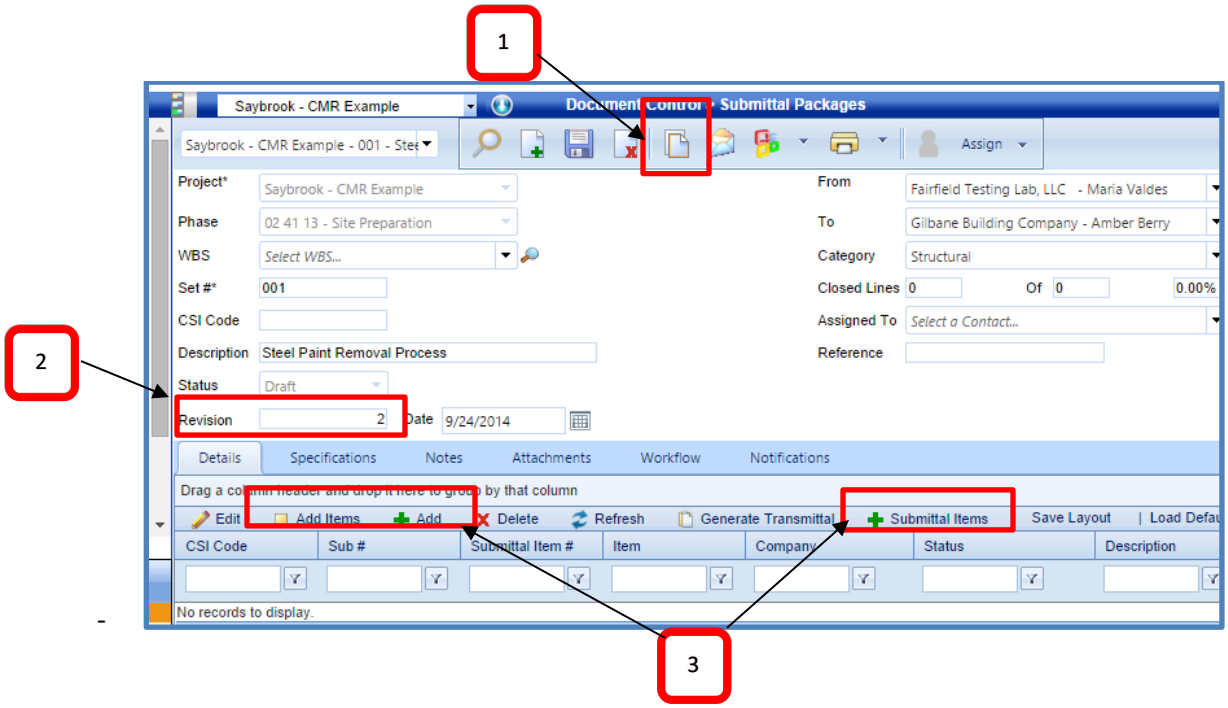


Document Control Module

Routing a Submittal Package through Workflow- continued

What happens if a few Submittal line items are rejected or have to be revised?

- Even if a few of submittal line items within a schedule package are rejected or need to be revised you should not send the Submittal Package back to the original person that generated the submittal package. The best way is to continue getting the submittal package through the entire process. Eventually the package will come back to the person that created it. Once they have made the necessary corrections they can create a Revision **(1)** of the Submittal package just to include those line items that were rejected. Then this will automatically generate a new revision of the submittal package in this example (Rev2) **(2)**. Finally you would upload the corrected submittal items into the revised submittal **(3)** and entered it back into the Workflow.

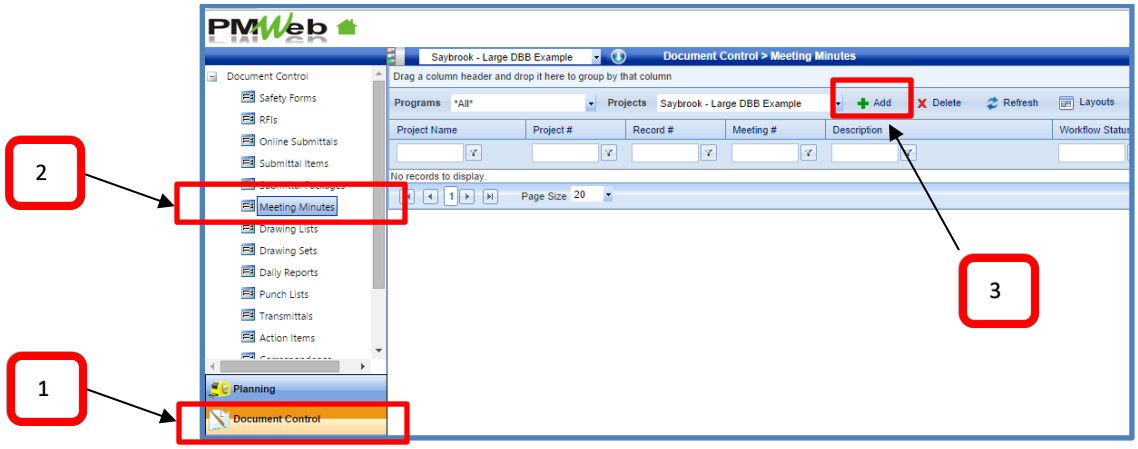


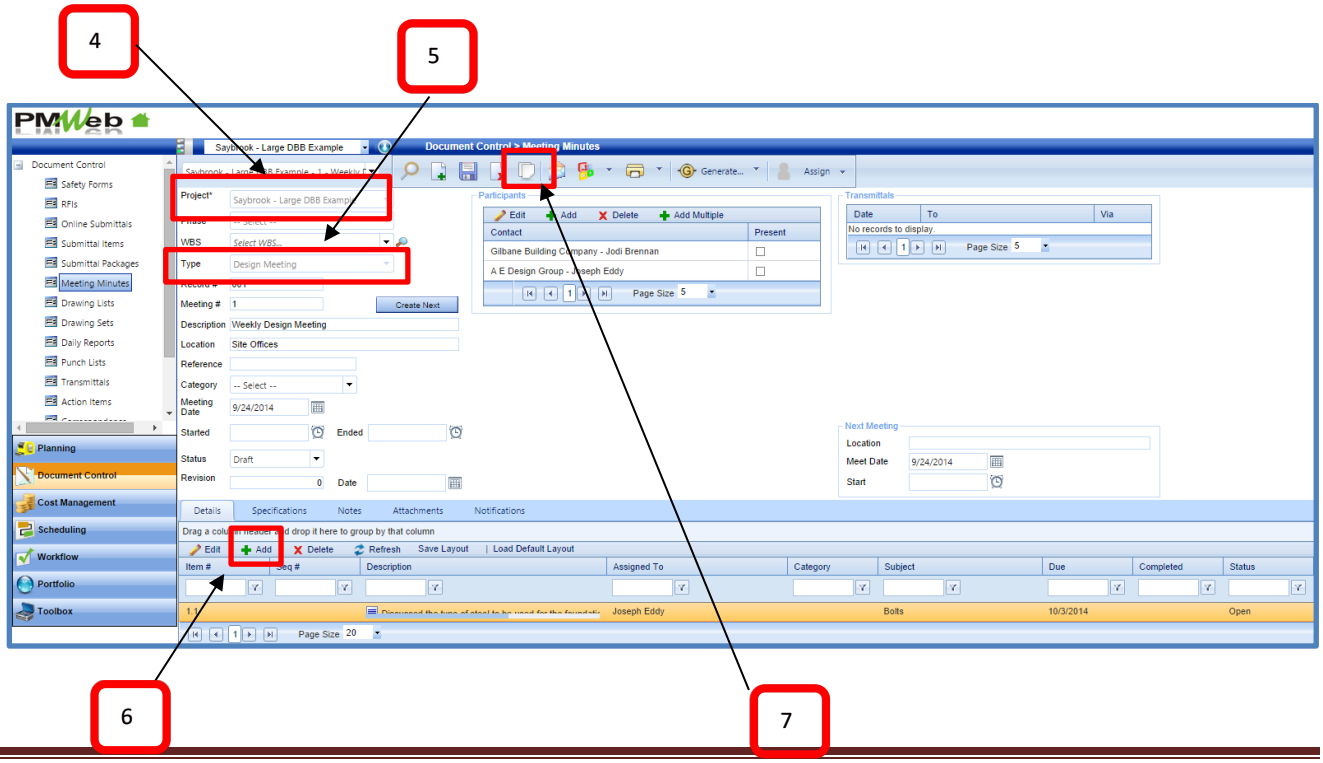
Document Control Module

Meeting Minutes

To create Meeting Minutes within PMWeb select Document Control **(1)** and then Meeting Minutes in the top left hand section **(2)**. To add a New Meeting Minutes select Add **(3)**

You have to enter the project again **(4)** and the Type of meeting **(5)** then make sure to save. Then you can enter the meeting minutes in the detailed section **(6)**. To create the meeting minutes from the last meeting just copy the old minutes **(7)**



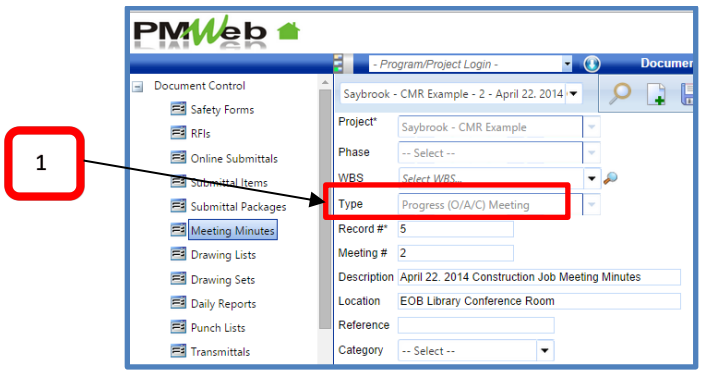


Document Control Module

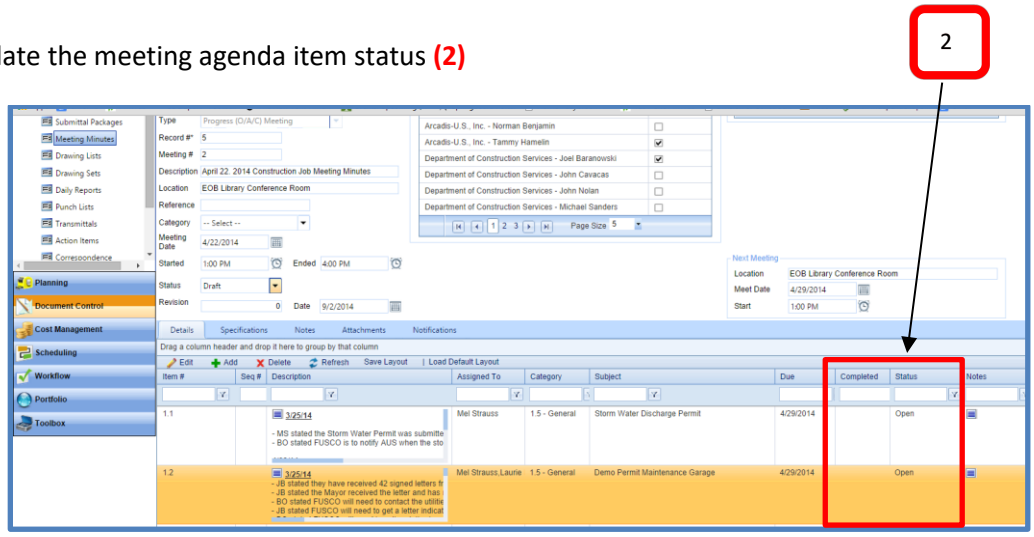
Creating Meeting Minutes - continued

The Importance of Selecting Meeting Type:

The Type of meeting must be selected **(1)** and this will then start the sequential numbering system of each type of meeting. Therefore it is important to select a unique meeting type for each different type of meeting otherwise the numbering system for the meetings will get mixed up. So for example you may have two site meetings each week. One is with the Construction manager to discuss progress and issues. The other site meeting might be for safety issues only. Therefore you should define two different meeting types, like Weekly Progress Review Meeting and Site Safety Meeting.



Always make sure you update the meeting agenda item status **(2)**

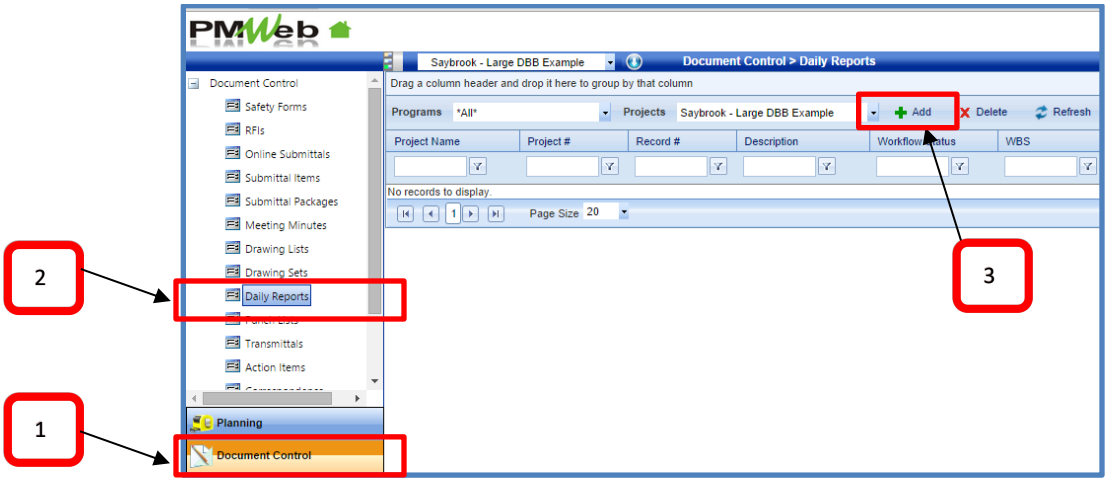


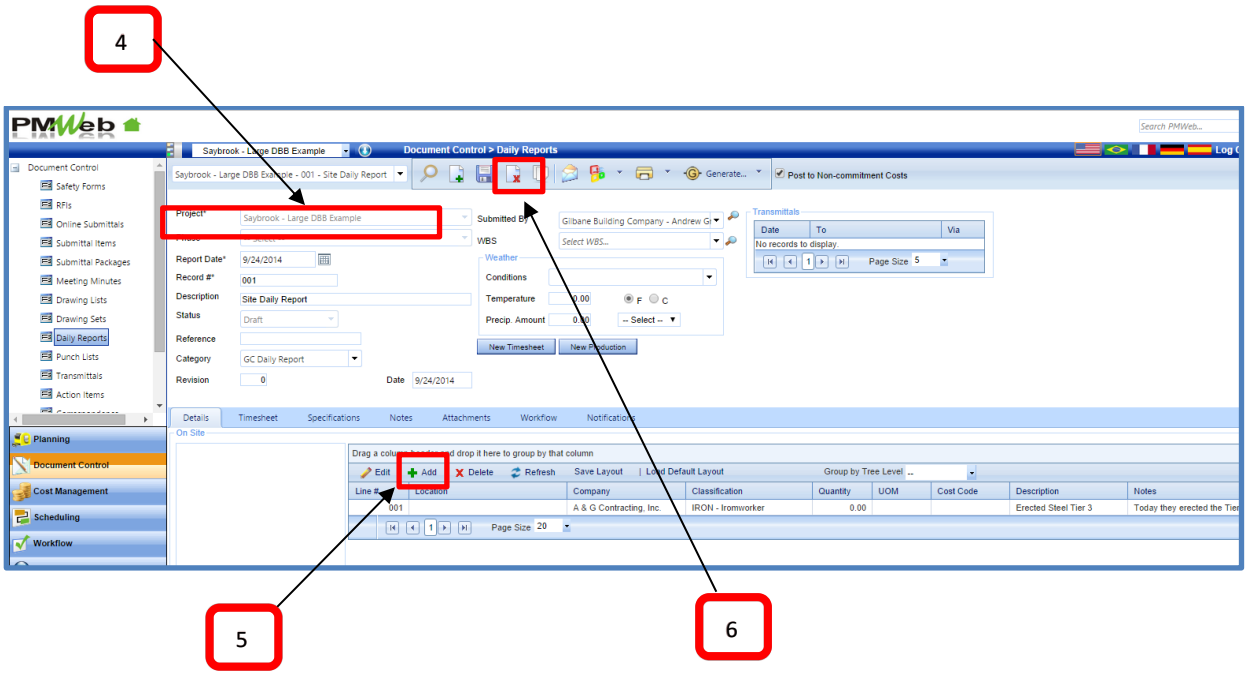
Document Control Module

Daily Reports

To create Meeting Minutes within PMWeb select Document Control **(1)** and then Meeting Minutes in the top left hand section **(2)**. To add a New Daily Report select Add **(3)**

You have to enter the project again **(4)** and then make sure to save. Then you can enter the Daily Report Items in the detailed section **(5)**. To create the daily report for the following day just Copy the last report **(6)**





Cost Module

Overview

This Cost Training package is designed to standardize the way in which costs are entered into PMWeb so that the cost information for each project will be consistent for reporting purposes.

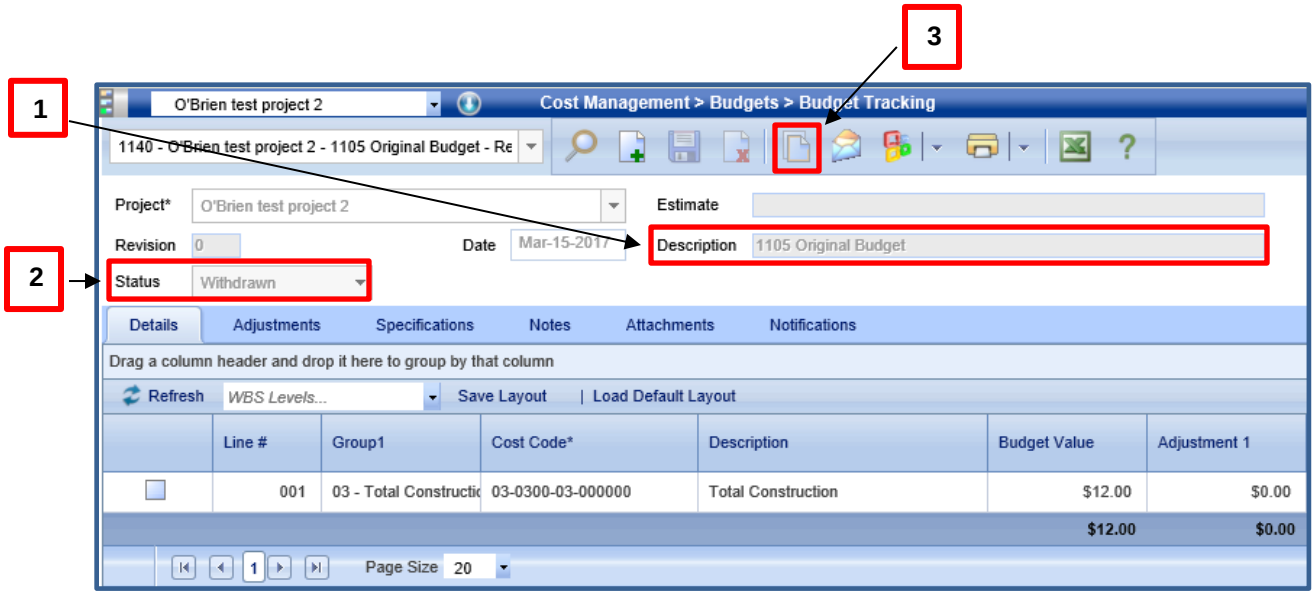
General Cost Entry Rules:

1) Contingency is transferred using Line Item Transfers in the Project Financials Module
2) Contingency is Not a Commitment. (Should not invoice, write a PCO or CO against it)
3) Make sure to link your Change Order (CO) back to the original PCO (s)
4) All cost transactions should include the following fields:
    a. Cost Code (mandatory) value
    b. "Commitment" value
    c. "Assigned To" value
5) In the Cost Management module it is important to remember to change the Status of Change Orders, Budgets etc. to APPROVED otherwise they will not appear on the reports. The only exception is Potential Change Orders (PCO's) whose status will be automatically updated to approved once the change order it is linked to is approved.

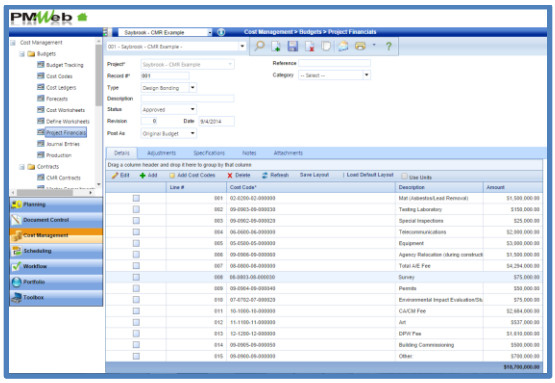
Cost Module

Budget Tracking

1) **Step #1: Budget Tracking Module:**
   a. This is where you set up your high level budgets starting with the 1105 budget and any additional bonding changes as you progress through the project. You should give each budget a unique description **(1)**
   b. In order to create a new Budget (e.g. Construction Budget) you need to change the status of the existing budget to "Withdrawn" **(2)**. This will then allow you to copy over the existing budget in order to update the new one **(3)**.
   c. Keep in mind that the budget numbers entered here are only used to track the history of the overall budget throughout the life of the project.



2) Step #2: Project Financials :

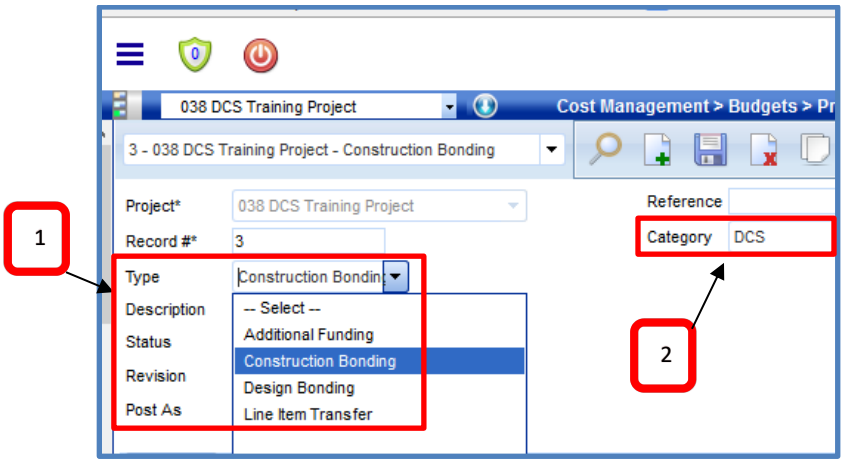


Under Type **(1)** you can create and manage the following:

a) Design (Bonding) budget
b) Construction (Bonding) budget.
c) Line Item Transfers of Contingency
d) Line item transfers of one budget item to another
e) Add any additional Funding a project may receive.

Category **(2)** is a required field

a) CMR = Construction Budget managed in PMWeb by the CMR
b) DCS = Budget being managed in PMWeb by DCS PM

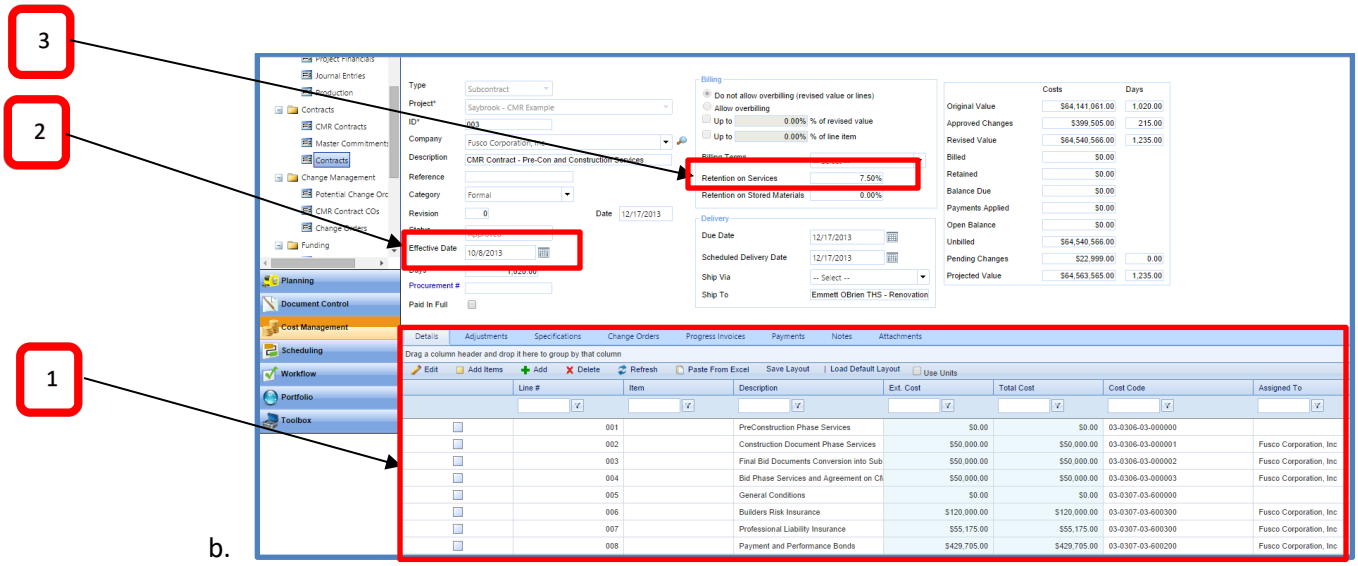


3) Step #3: Contracts Module:

a. These is where you will set up all your contracts and detailed schedule of values **(1)**

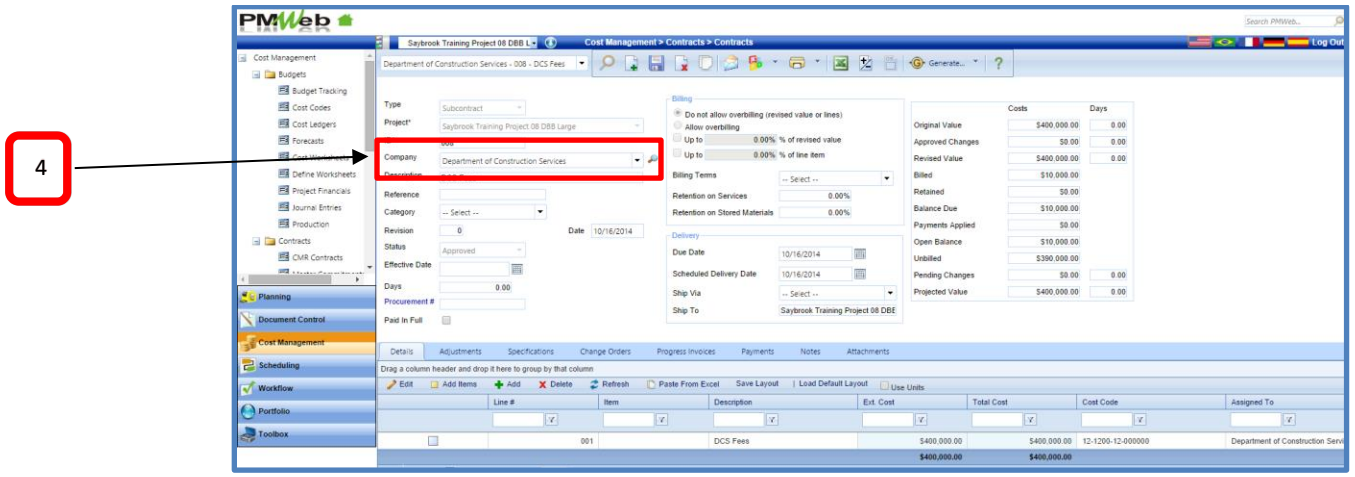
i. Make sure you fill in the Effective Date correctly as you will not be able to process any invoices that are dated before this effective date **(2)**

ii. Also remember to fill in the retainage % value **(3)**



<u>DCS Fees Set Up:</u> This is also the module where you will set up a contract with the Department of Construction Services (in the Company Field **(4)**) to cover the DCS fees on a project.

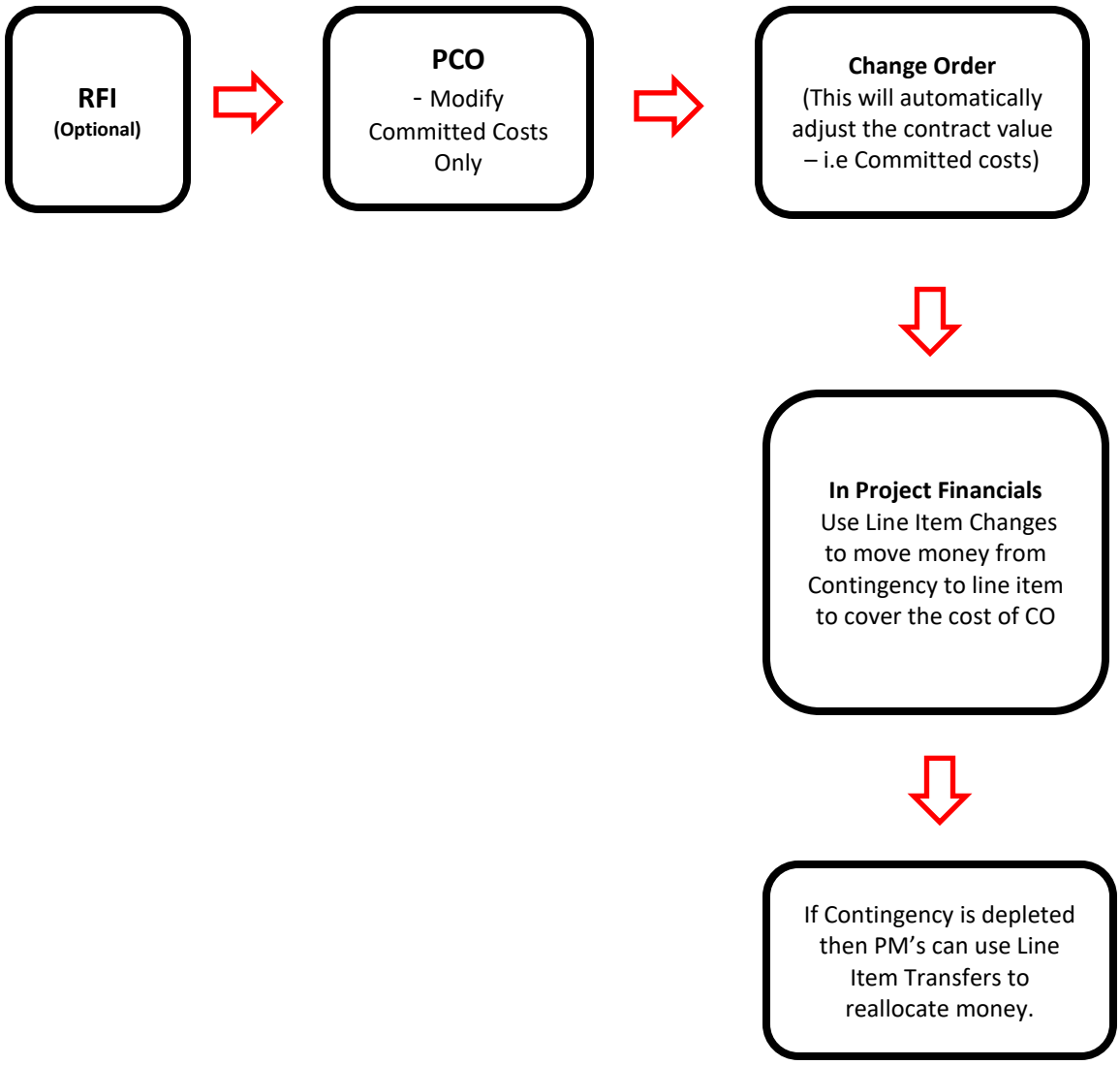
4)



RFI -> PCO -> CO Process

How to generate an RFI -> PCO -> CO (+ Adjust Contingency)

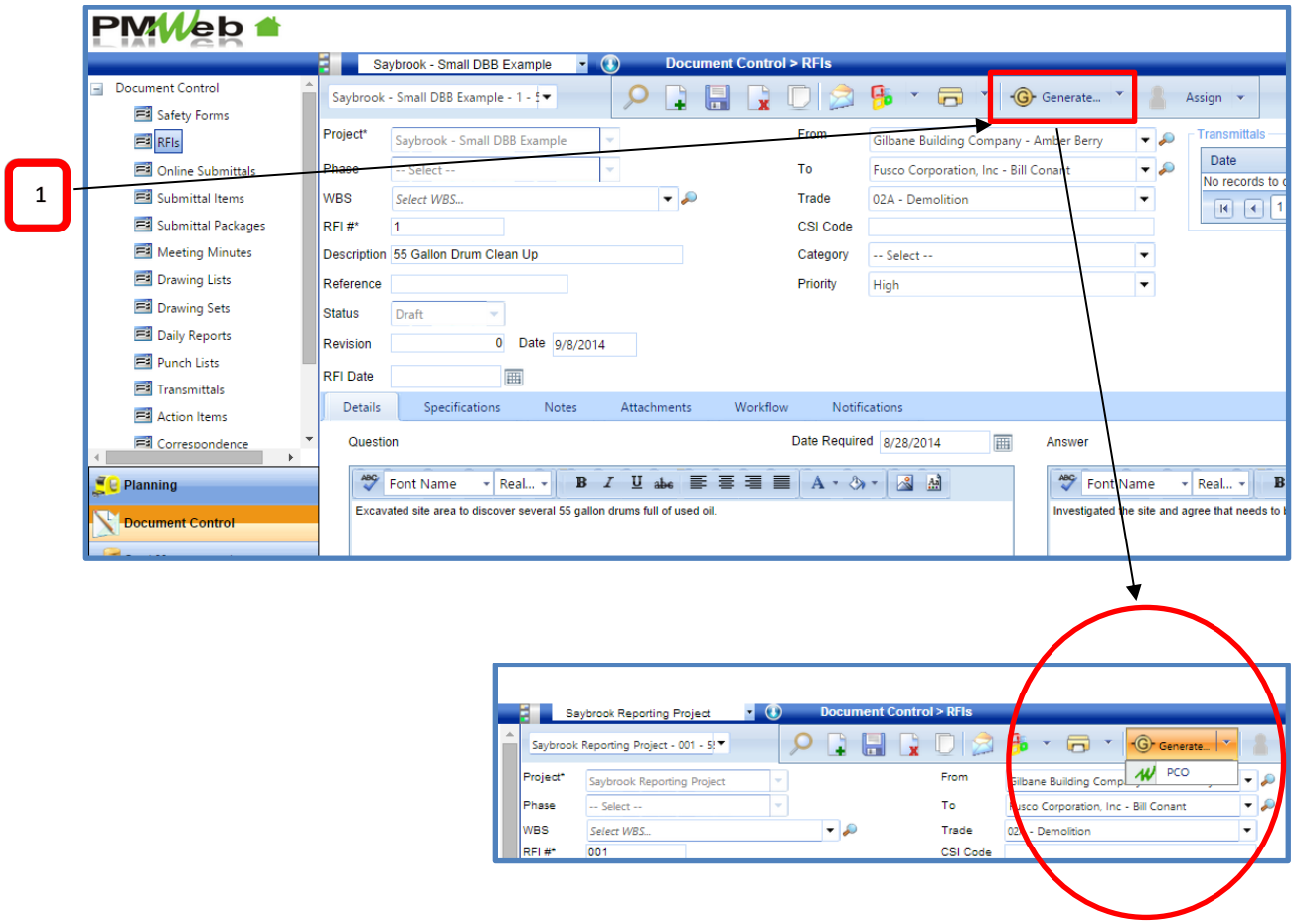
Note: You do not have to generate an RFI prior to creating a PCO. You can create a PCO directly. ***But you must have a PCO generated prior to creating a CO.***



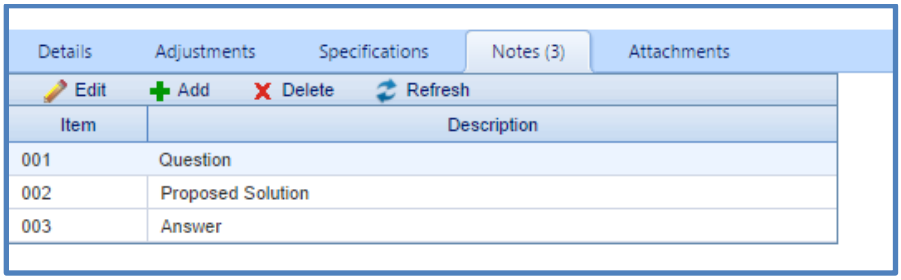
Cost Module

Proposed Change Order (PCO)

- After an RFI has been created it is possible to automatically generate a PCO directly from it by clicking on the Generate Icon **(1)**



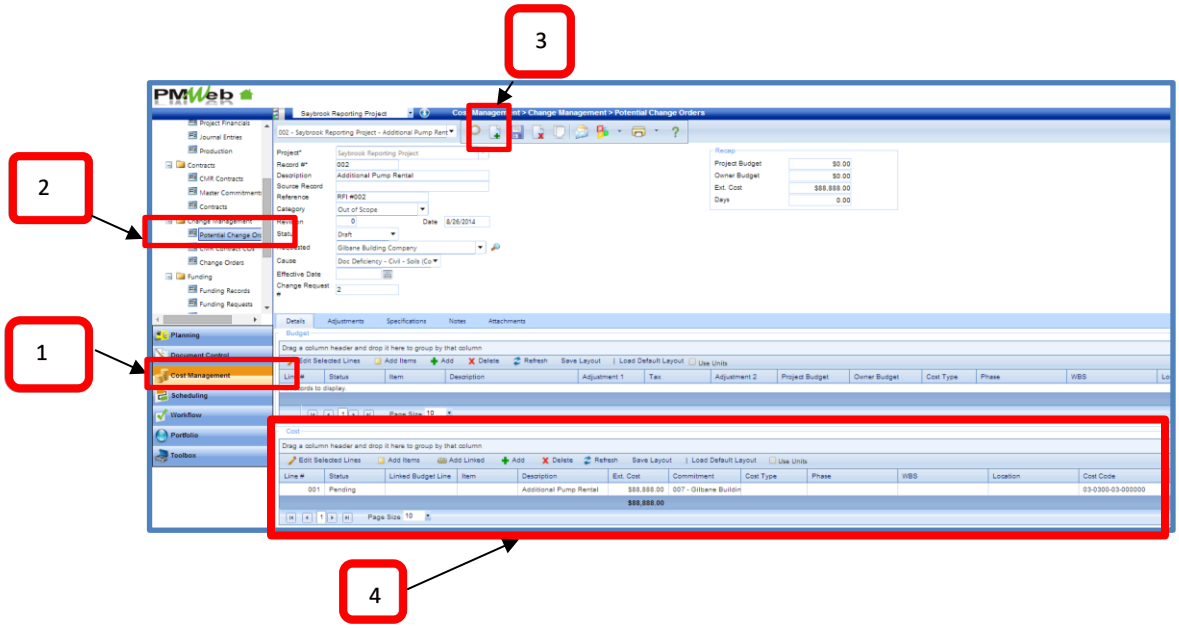
- By linking an RFI to a PCO will automatically bring over the question and answers of the RFI into the Notes tab of the PCO.



Cost Module

Creating a Proposed Change Order (PCO)

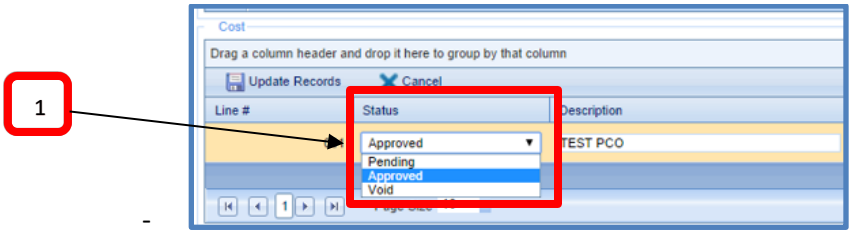
- Under Cost Management **(1)** -> Proposed Change Orders **(2)** -> Add **(3)**
- Do **NOT** use the Budget Section.
- In the Cost Section Only – add the estimated cost of the PCO and assign to the correct Cost Code (Not Contingency), the correct commitment and complete the assigned To. **(4)**



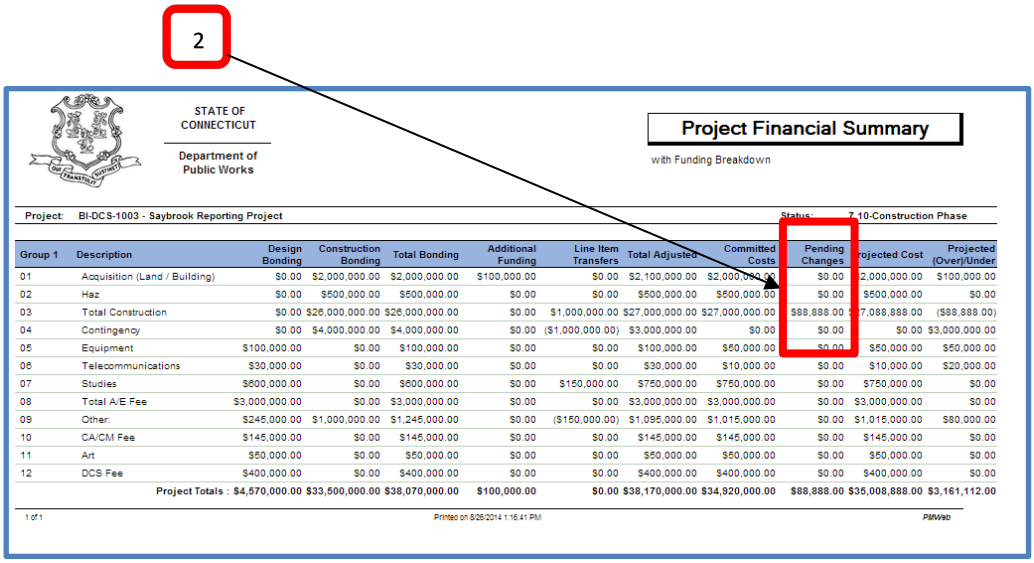
Cost Module

Creating a Proposed Change Order (PCO) Continued

IMPORTANT: The status options **(1)** of a PCO are very important as they will determine if the value of the PCO will show up on the financial reports or not.



- ***Pending:*** If the status of a PCO is set to Pending then it will show up on the financial report as a Pending change **(2)**.



Group 1	Description	Design Bonding	Construction Bonding	Total Bonding	Additional Funding	Line Item Transfers	Total Adjusted	Committed Costs	Pending Changes	Projected Cost	Projected (Over)/Under
01	Acquisition (Land / Building)	$0.00	$2,000,000.00	$2,000,000.00	$100,000.00	$0.00	$2,100,000.00	$2,000,000.00	$0.00	$2,000,000.00	$100,000.00
02	Haz	$0.00	$500,000.00	$500,000.00	$0.00	$0.00	$500,000.00	$500,000.00	$0.00	$500,000.00	$0.00
03	Total Construction	$0.00	$26,000,000.00	$26,000,000.00	$0.00	$1,000,000.00	$27,000,000.00	$27,000,000.00	$88,888.00	$27,088,888.00	($88,888.00)
04	Contingency	$0.00	$4,000,000.00	$4,000,000.00	$0.00	($1,000,000.00)	$3,000,000.00	$0.00	$0.00	$0.00	$3,000,000.00
05	Equipment	$100,000.00	$0.00	$100,000.00	$0.00	$0.00	$100,000.00	$50,000.00	$0.00	$50,000.00	$50,000.00
06	Telecommunications	$30,000.00	$0.00	$30,000.00	$0.00	$0.00	$30,000.00	$10,000.00	$0.00	$10,000.00	$20,000.00
07	Studies	$600,000.00	$0.00	$600,000.00	$0.00	$150,000.00	$750,000.00	$750,000.00	$0.00	$750,000.00	$0.00
08	Total A/E Fee	$3,000,000.00	$0.00	$3,000,000.00	$0.00	$0.00	$3,000,000.00	$3,000,000.00	$0.00	$3,000,000.00	$0.00
09	Other:	$245,000.00	$1,000,000.00	$1,245,000.00	$0.00	($150,000.00)	$1,095,000.00	$1,015,000.00	$0.00	$1,015,000.00	$80,000.00
10	CA/CM Fee	$145,000.00	$0.00	$145,000.00	$0.00	$0.00	$145,000.00	$145,000.00	$0.00	$145,000.00	$0.00
11	Art	$50,000.00	$0.00	$50,000.00	$0.00	$0.00	$50,000.00	$50,000.00	$0.00	$50,000.00	$0.00
12	DCS Fee	$400,000.00	$0.00	$400,000.00	$0.00	$0.00	$400,000.00	$400,000.00	$0.00	$400,000.00	$0.00
	Project Totals :	$4,570,000.00	$33,500,000.00	$38,070,000.00	$100,000.00	$0.00	$38,170,000.00	$34,920,000.00	$88,888.00	$35,008,888.00	$3,161,112.00

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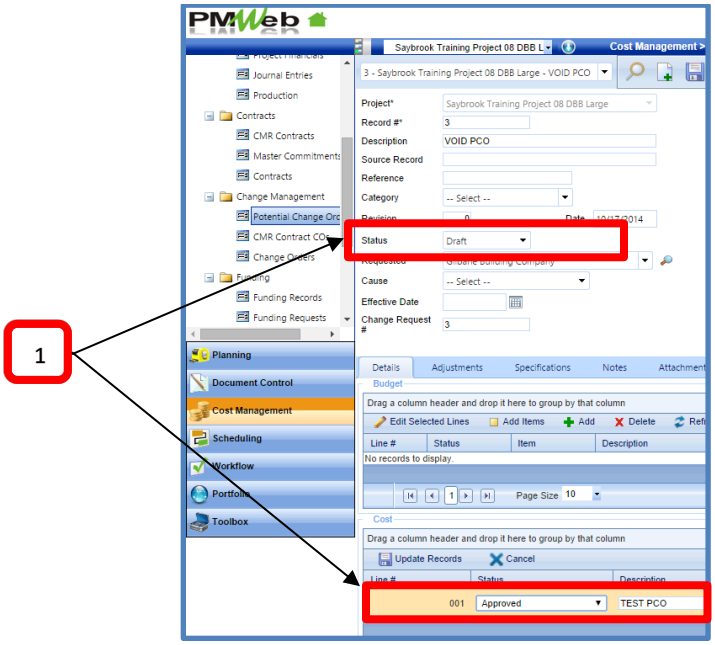
- ***Void*** – If the status of a PCO is set to Void then it will **NOT** show up on the financial report.

- ***Approved*** – You should NOT select this option. This will be automatically set to "Approved" once the Change Order has been approved provided you have linked the PCO to the CO.

Cost Module

Creating a Proposed Change Order (PCO) Continued

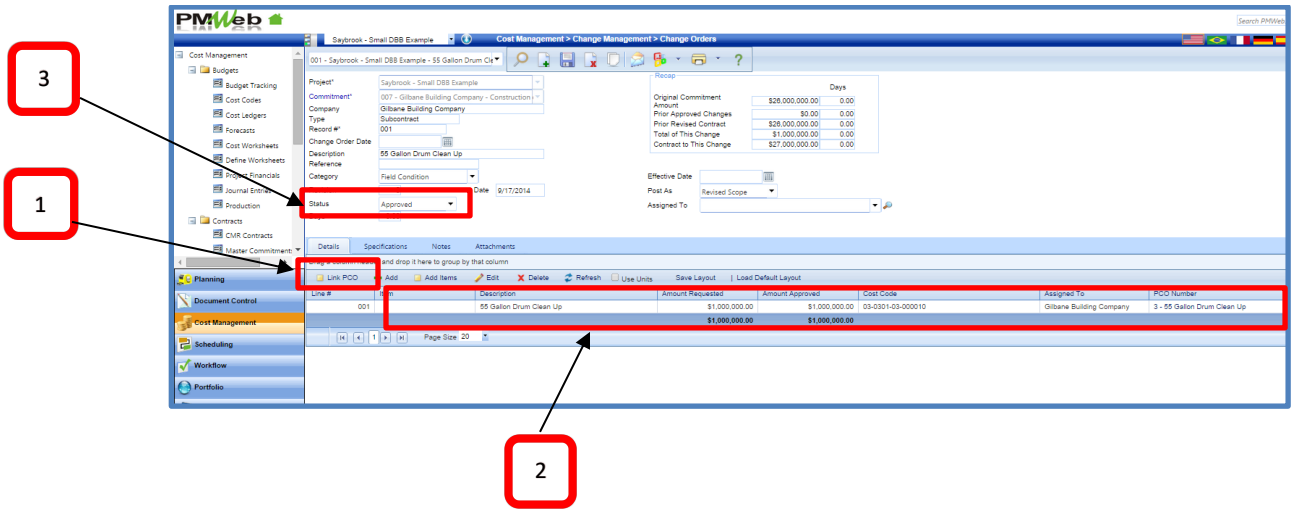
Note: The status of the PCO in the Header maybe different than that of the Status of the PCO line item in the Cost section **(1)**. The Status in the Header refers to a PCO that goes through Workflow which we are currently not using. The most important thing is the status of the PCO line item in the Cost section.



Cost Module

Change Order

- Under Cost Management -> Change Orders -> Add
- Once you add a new CO you can then go back and link it to the original PCO **(1)**
- Enter the final CO Approve Amount and assign it to the correct cost code (Not Contingency) **(2)**
- Change Status of CO to "Approved" and Save **(3)**



Note: Once you approve the Change Order it will automatically the status of the PCO to "approved".

In this example the approved CO has increase the Construction Commitment by $1M so now we need to move money from Contingency to Construction to cover the cost of the CO.

STATE OF CONNECTICUT

Department of Public Works

Project Financial Summary

with Funding Breakdown

Project: BI-DCS-1007 - Saybrook - Small DBB Example **Status:** 7.10-Construction Phase

Group 1	Description	Design Bonding	Construction Bonding	Total Bonding	Additional Funding	Line Item Transfers	Total Adjusted	Committed Costs	Pending Changes	Projected Cost	Projected (Over)/Under
01	Acquisition (Land / Building)	$0.00	$2,000,000.00	$2,000,000.00	$100,000.00	$0.00	$2,100,000.00	$0.00	$0.00	$0.00	$2,100,000.00
02	Haz	$0.00	$500,000.00	$500,000.00	$0.00	$111,111.00	$611,111.00	$500,000.00	$0.00	$500,000.00	$111,111.00
03	Total Construction	$0.00	$26,000,000.00	$26,000,000.00	$0.00	$1,044,444.00	$27,044,444.00	$27,000,000.00	$0.00	$27,000,000.00	$44,444.00
04	Contingency	$0.00	$4,000,000.00	$4,000,000.00	$0.00	($1,175,554.00)	$2,824,446.00	$0.00	$0.00	$0.00	$2,824,446.00
05	Equipment	$100,000.00	$0.00	$100,000.00	$0.00	$0.00	$100,000.00	$0.00	$0.00	$0.00	$100,000.00
06	Telecommunications	$30,000.00	$0.00	$30,000.00	$0.00	$0.00	$30,000.00	$0.00	$0.00	$0.00	$30,000.00
07	Studies	$600,000.00	$0.00	$600,000.00	$0.00	$150,000.00	$750,000.00	$750,000.00	$0.00	$750,000.00	$0.00
08	Total A/E Fee	$3,000,000.00	$0.00	$3,000,000.00	$0.00	$0.00	$3,000,000.00	$0.00	$0.00	$0.00	$3,000,000.00
09	Other:	$245,000.00	$1,000,000.00	$1,245,000.00	$0.00	($130,001.00)	$1,114,999.00	$15,000.00	$0.00	$15,000.00	$1,099,999.00
10	CA/CM Fee	$145,000.00	$0.00	$145,000.00	$0.00	$0.00	$145,000.00	$0.00	$0.00	$0.00	$145,000.00
11	Art	$50,000.00	$0.00	$50,000.00	$0.00	$0.00	$50,000.00	$0.00	$0.00	$0.00	$50,000.00
12	DCS Fee	$400,000.00	$0.00	$400,000.00	$0.00	$0.00	$400,000.00	$0.00	$0.00	$0.00	$400,000.00
	Project Totals :	**$4,570,000.00**	**$33,500,000.00**	**$38,070,000.00**	**$100,000.00**	**$0.00**	**$38,170,000.00**	**$28,265,000.00**	**$0.00**	**$28,265,000.00**	**$9,905,000.00**

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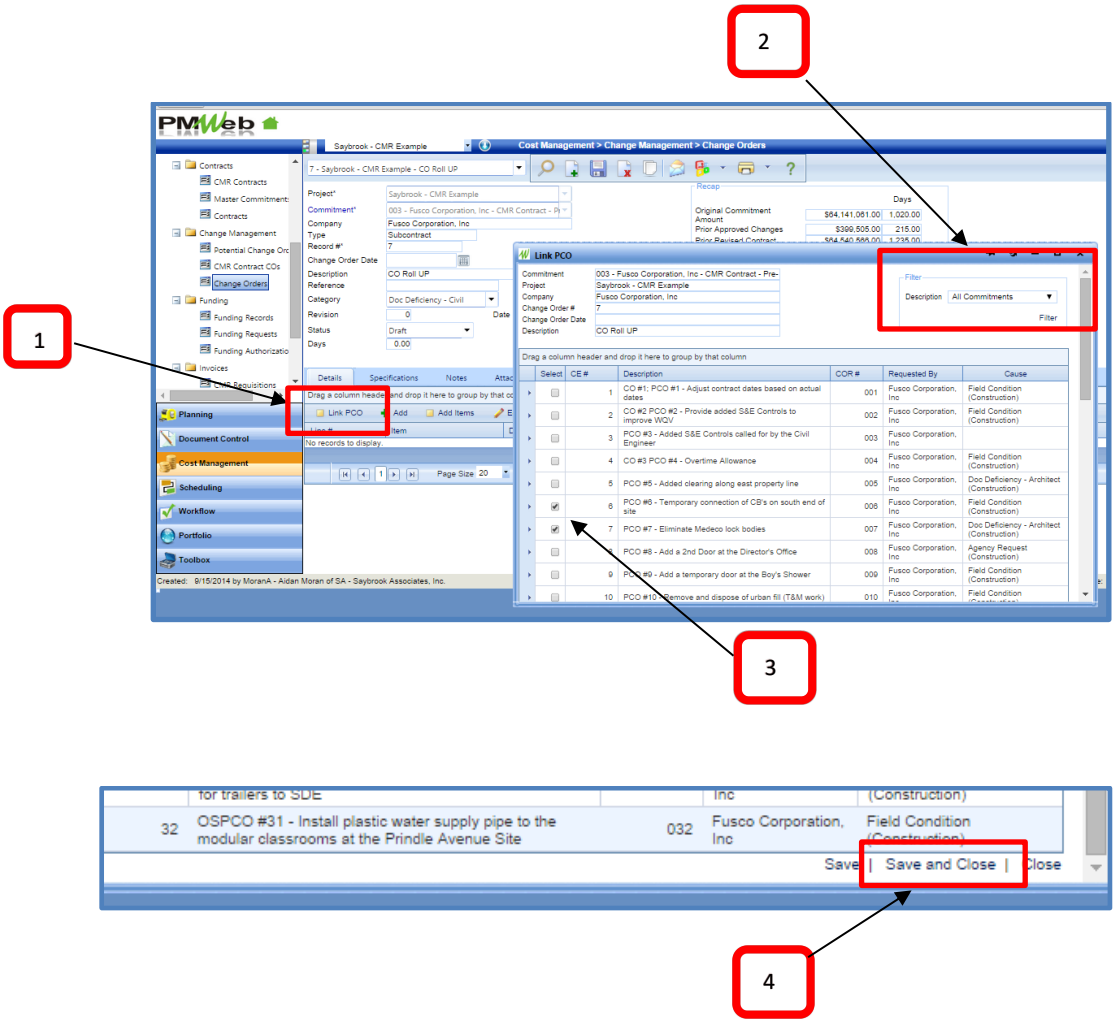
Cost Module

Creating a CO from multiple PCO's

- After you have created the Change Order (CO) then you can select the Link PCO Icon **(1)**
- Optional: If you do not see any PCO's then Select "All Commitments" as your Filter **(2)**
- Select the PCO's that are going to be rolled up into this CO **(3)**
- Make sure you click Save and Close which is located at the bottom of the PCO pop-up window **(4)**

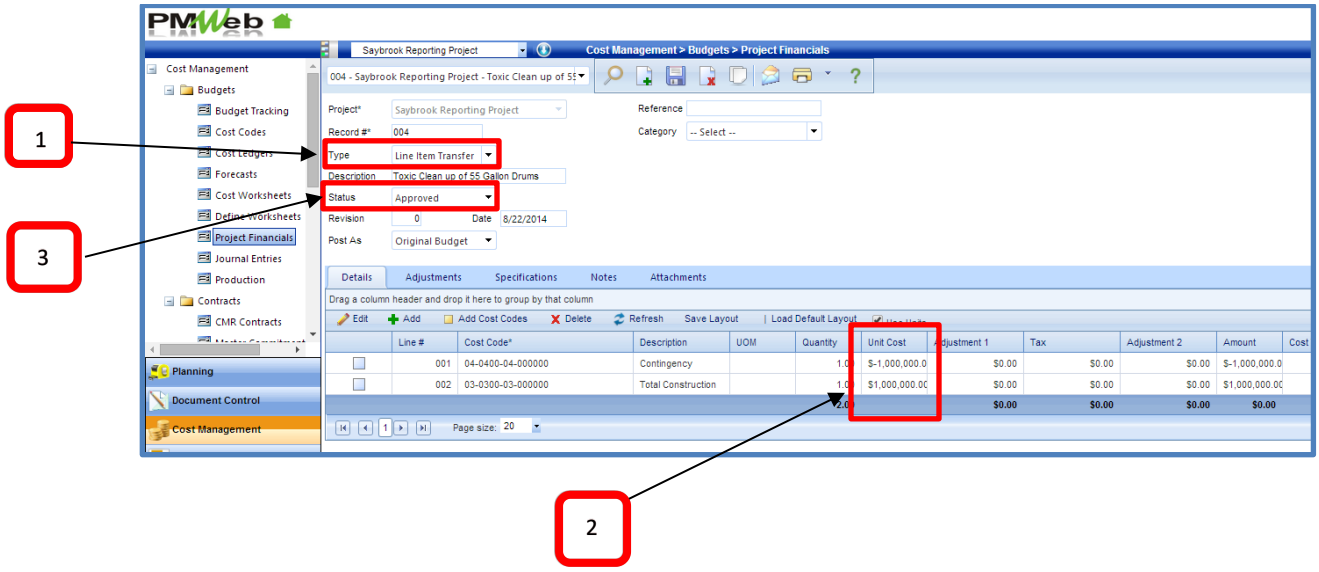


NOTE: In general you have to link a CO to a PCO otherwise if the CO is not approved both the pending costs from the PCO and the CO will double up on the summary cost reports.

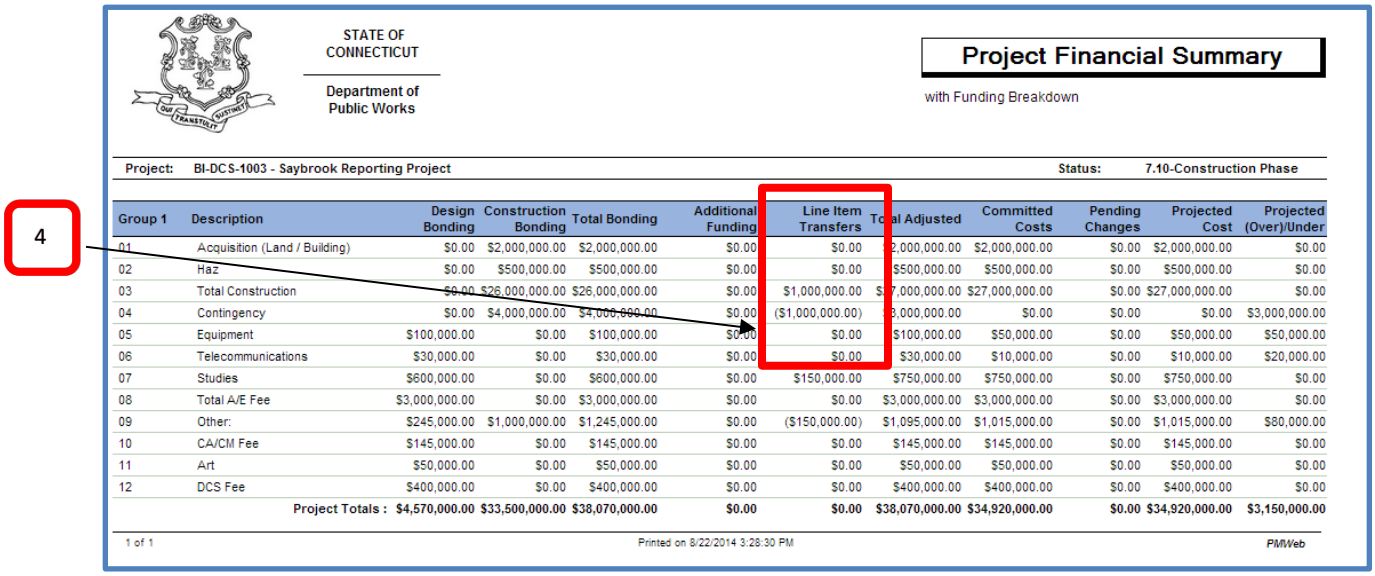
Cost Module

Contingency Management

- Under Cost Management -> Project Financials -> Add
- Select Type = Line Item Transfer **(1)**
- You will transfer money from Contingency (a negative dollar entry) and another entry (in this case to Construction) with a positive dollar value – **(2)**
- Change Status of Line Item Transfer to "Approved" and Save **(3)**



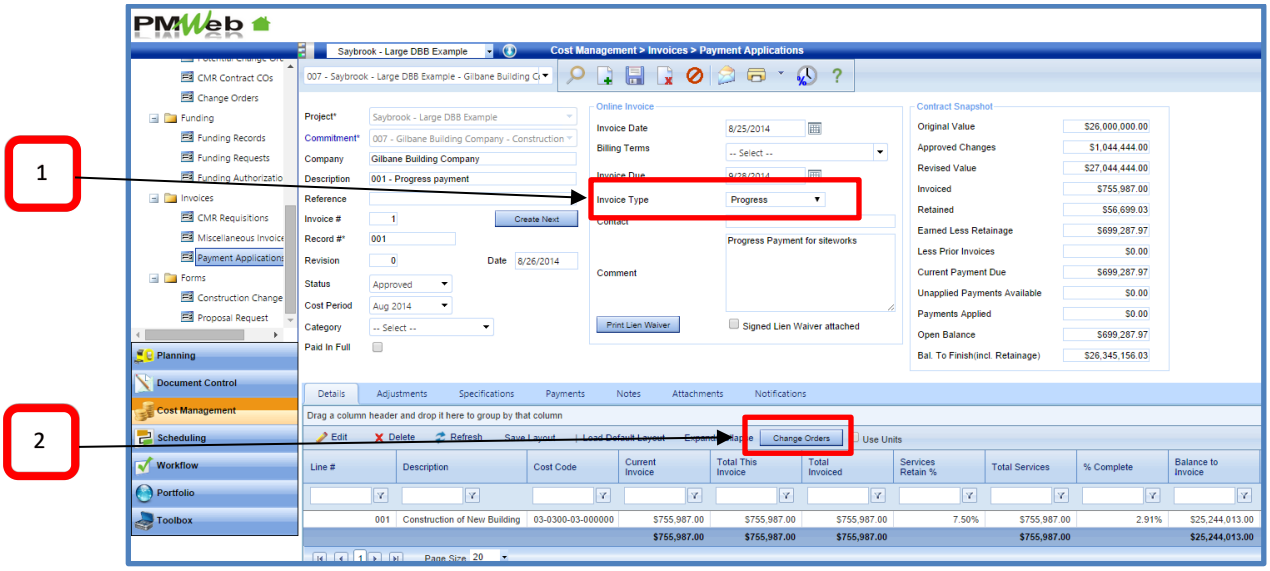
Now on the worksheet you can see the transfer of funds from Contingency to Construction **(4)**

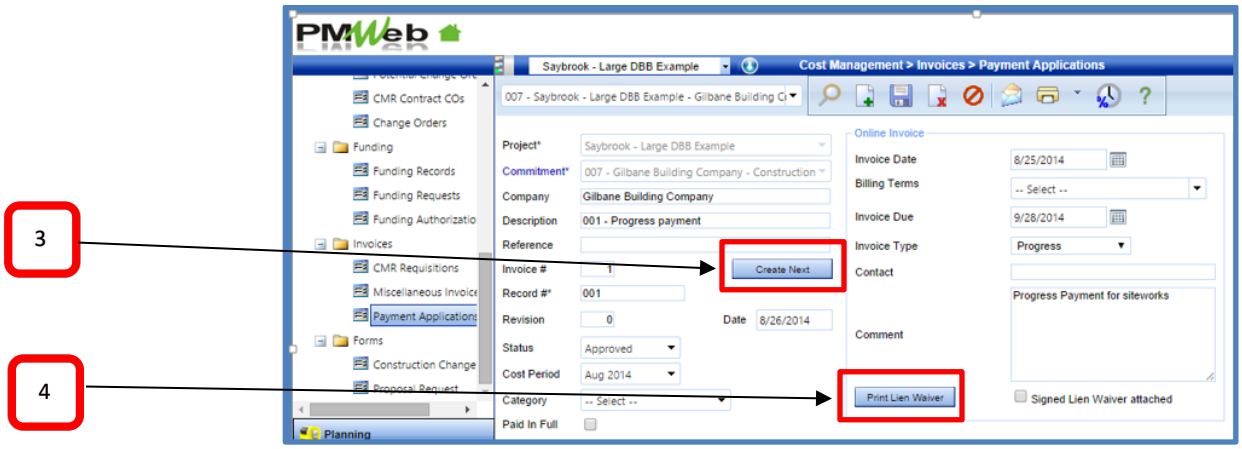


Cost Module

Payment Applications

- Cost Management -> Payment Applications -> Add
- One field you need to fill out is the Invoice Type Field. For all invoices it should be set to “Progress” except for the last invoice which can be set to “Final” **(1).** All invoices are processed in the payment application module. If you need to adjust the schedule of values based on any Change Orders that may have been approved you can select the Change Order Button **(2)**
- To generate the next invoice you simply select the Create Next Button and this will automatically roll over all the data from the last invoice **(3)**
- If there are any Lien Waivers required again you can generate these by selecting the Lien Waiver Button **(4)**

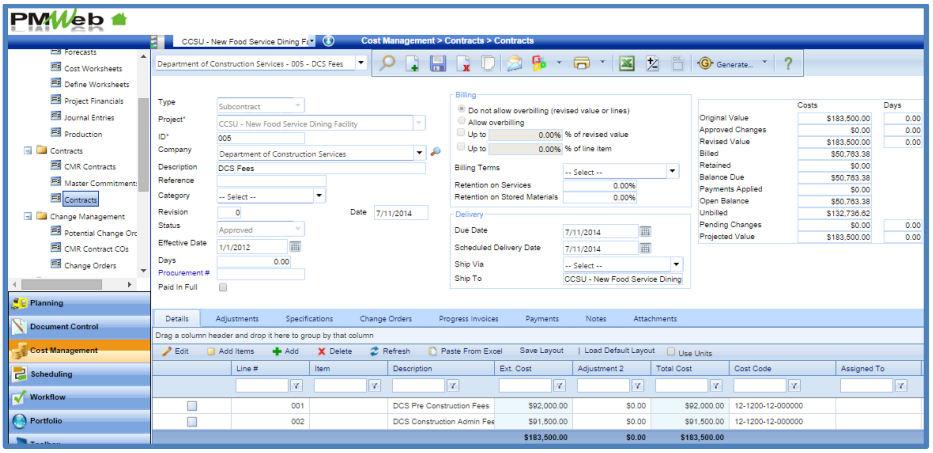




Cost Module

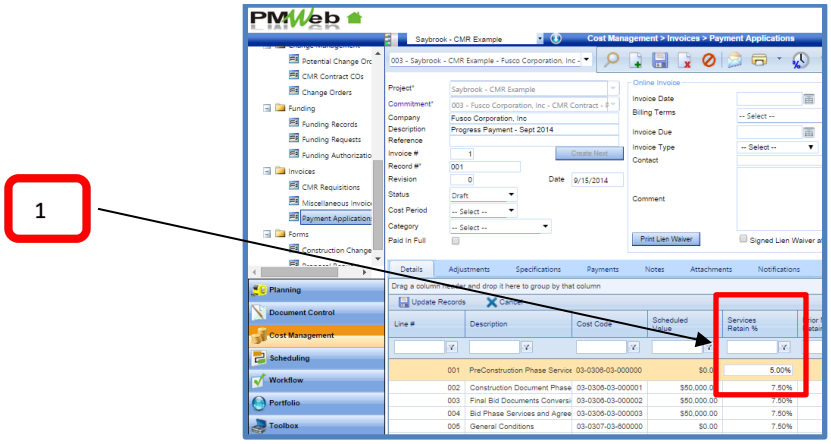
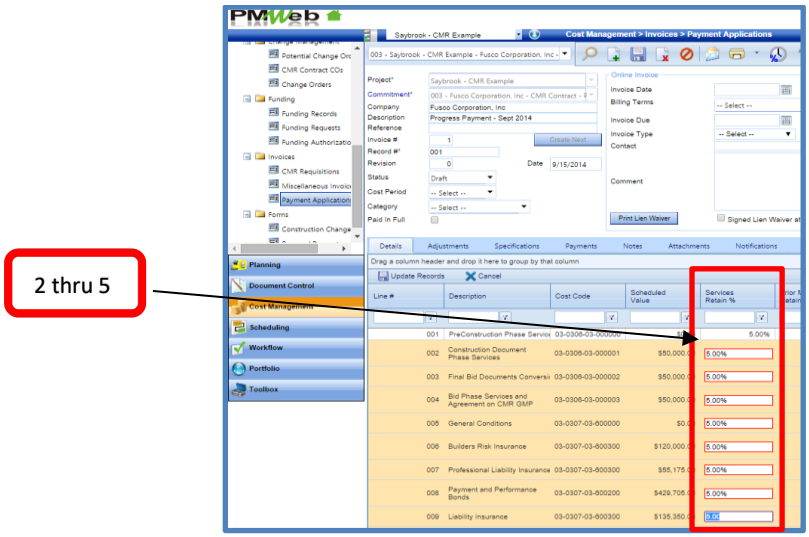
DCS Fees

- The tracking of all DCS Fees can be done by establishing an Internal Contract (or Commitment) for the total of the estimated DCS Fee amount and all fees can simply be invoiced against this.



Cost Module

Retainage Reduction

As a project progresses the amount of retainage is normally reduced. This % reduction is done in the Payment Application module.

- In the Payment Module select any record and in the Services Retain change the value to the new retainage rate (e.g. 5% from 7.5%) copy the new % retainage rate (CTRL-C) + Update Records **(1)**
- Then Highlight all the rows you want to modify (Select holding down either the CTRL or SHIFT key) **(2)**
- Then click on the Edit icon **(3)**
- Place mouse on the Column Header for Services Retain % - when a ***Double Cross*** icon appears double click the mouse and a red box will appear in the % fields **(4)**
- Then just paste (CTRL + V) and it will automatically populate all the boxes. Then hit Update Records **(5)**