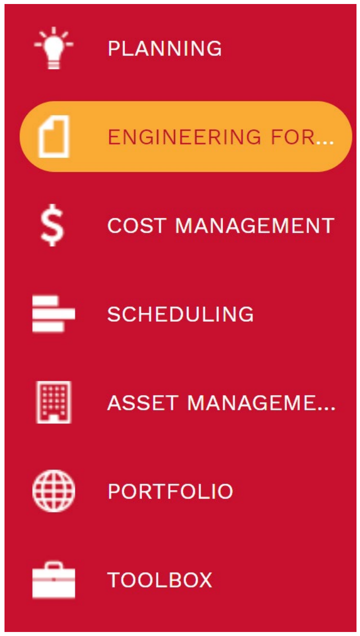
UNIVERSITY of HOUSTON
FACILITIES SERVICES

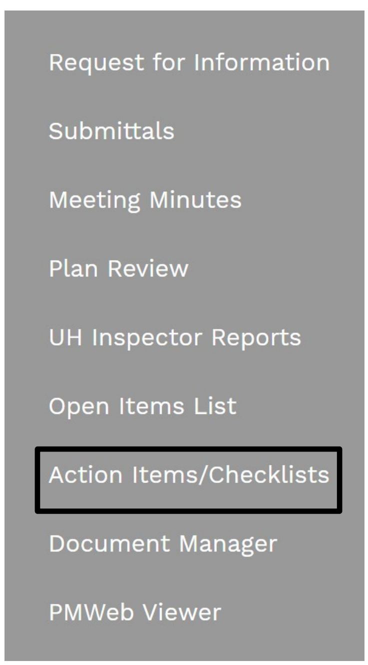
PMWeb Quick Reference

Red Zone Process

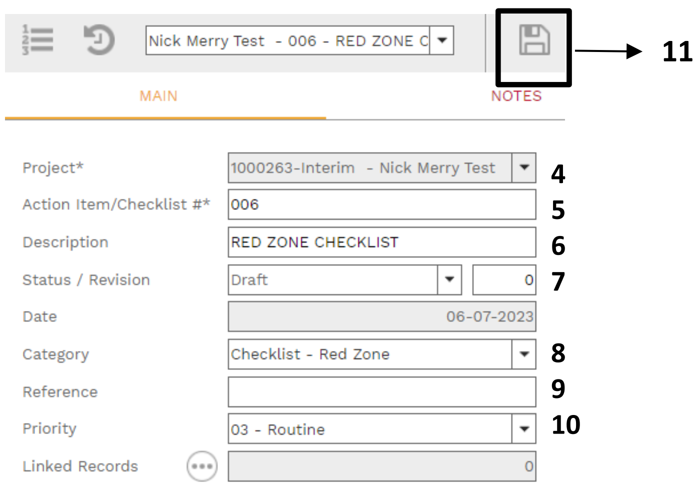
1- Click on **Engineering Forms** from the button on the left menu.



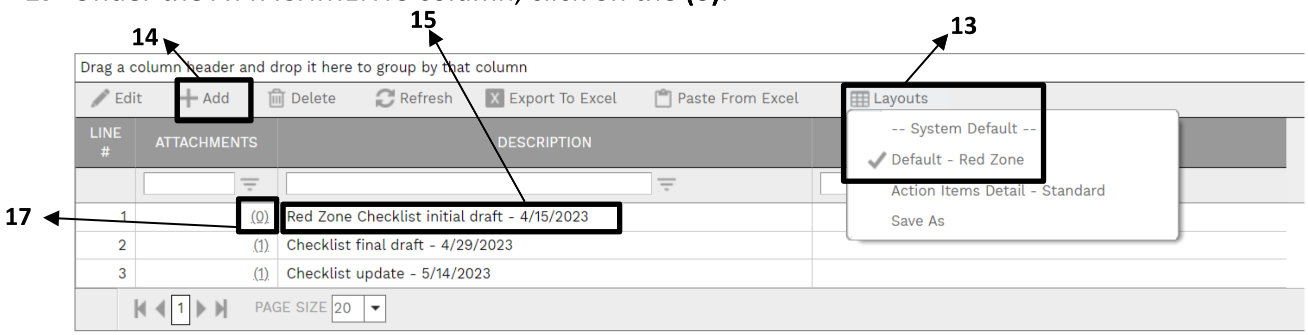
2- Under the Engineering forms tab, click on the **Action Items/Checklist** record.



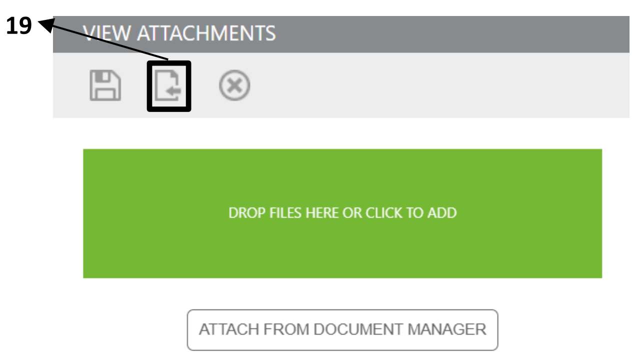
3- Click on **+ Add.**
4- Project field - Select the project from the dropdown menu.
5- Action Item/Checklist # field – auto populates with next sequential number
6- Description field - Enter ‘RED ZONE CHECKLIST’
7- Status field - Leave in draft.
8- Category field - Select ‘**Checklist – Red Zone**’ from the dropdown menu.
9- Reference field – Optional field.
10- Priority field – Leave as ‘Routine’.
11- From the top bar, click on the icon to save the header.



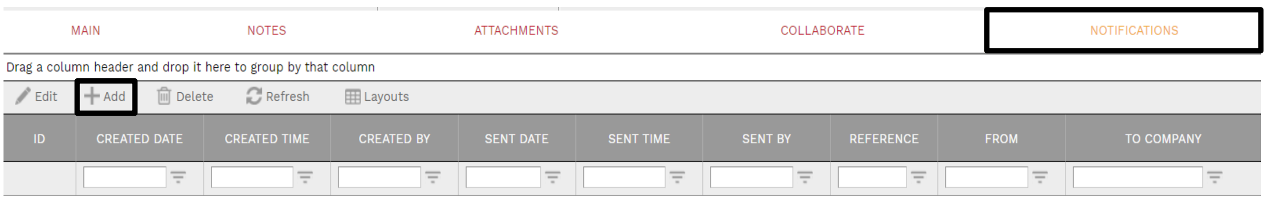
12- The details section will be used to post updated Red Zone checklists.
13- Under **Layouts**, select the ‘Default – Red Zone’ layout.
14- Select **+Add** to add a row.
15- Enter an appropriate description and a date i.e. ‘Red Zone Checklist initial draft - 4/15/2023’.
16- Click on the Save button.
17- Under the ATTACHMENTS column, click on the **(0)**.



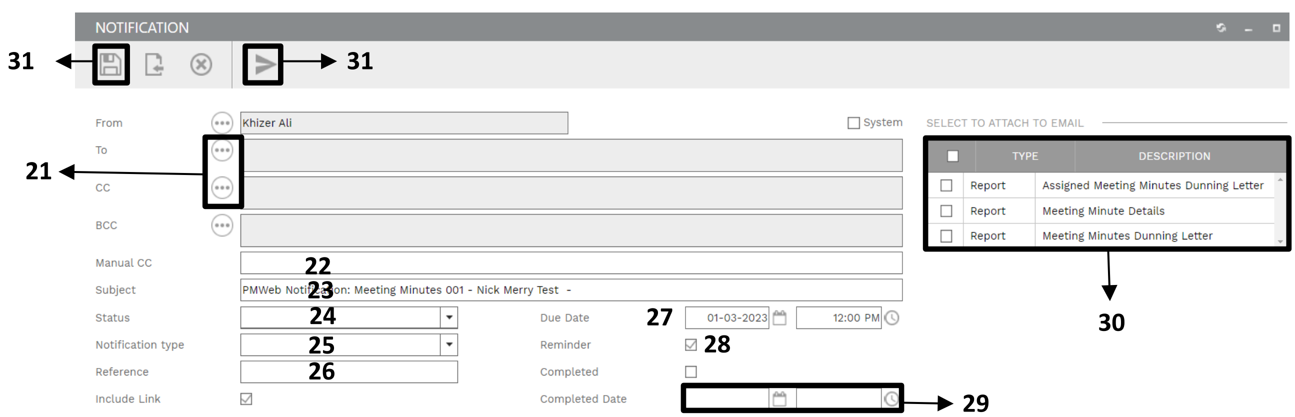
18- In the VIEW ATTACHMENTS pop up menu, drag the Checklist to the green DROP FILES HERE box.
19- Click on the Save & Exit button.



20- To distribute the Red Zone Checklist, under **"NOTIFICATIONS"** tab, click **+Add**.



21- In the pop up box, click on the icons to select **To** and **CC** addressees.
22- Manual CC field – utilize to add e-mail addresses for non-PM Web users.
23- Subject field – Add a relevant subject line for the e-mail.
24- Status field – Leave blank.
25- Notification type field – Select from drop down menu if applicable.
26- Reference field – Optional field.
27- Due Date – Optional field. Enter desired date and time.
28- Reminder Completed – Optional field. Click.
29- Completed Date – Optional field. Select desired date and time.
30- Within the **"SELECT TO ATTACH TO EMAIL"** box, click on the desired file(s) to include in the email notification.
31- Click on "**Save"** icon then the **"Send"** icon.



32- Process Complete