# UNIVERSITY of HOUSTON
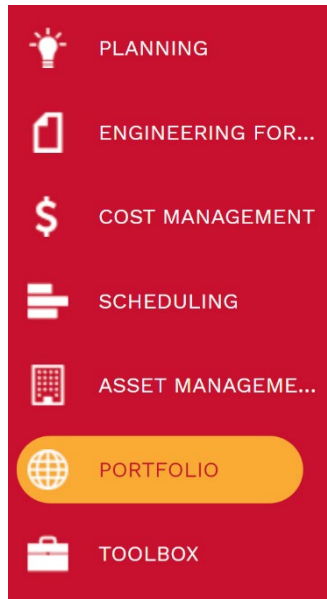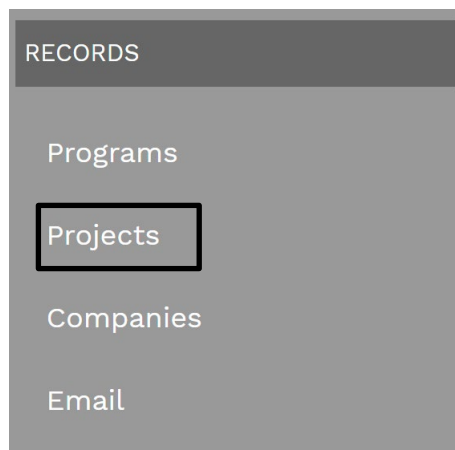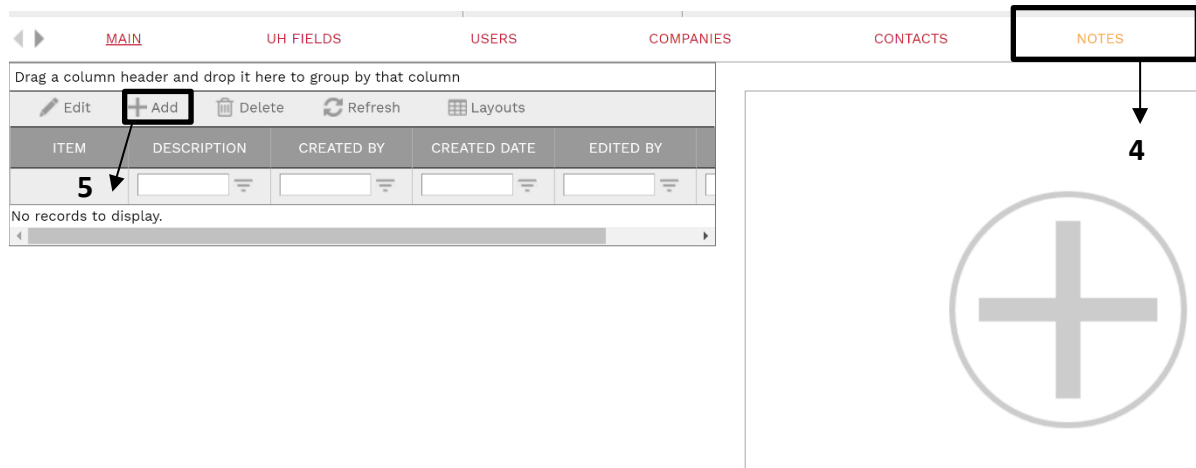## FACILITIES SERVICES

**PM**

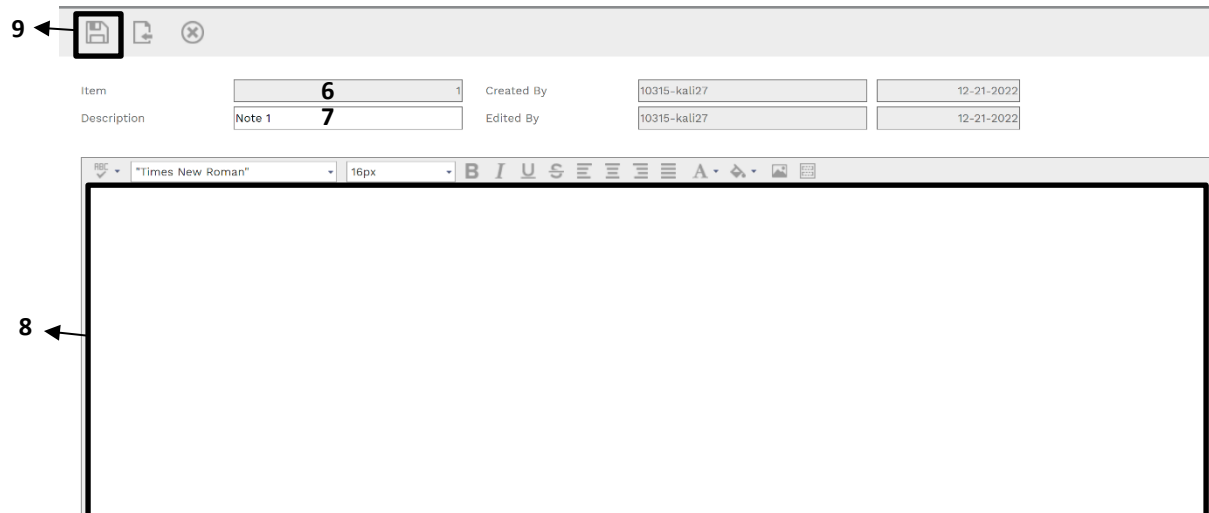**Generating Project Notes**

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



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

**3-** Select the desired Project.

**4-** Select the **Notes** tab in the top navigation bar.

**5-** Click on **+ Add** button under the tab which will open up a notes box



**6-** **Item** field – Will auto populate with next sequential number. Edit if desired

**7-** **Description** field - Enter an appropriate description. For example, for July's end of month report, an appropriate description would be 'July 2021 Project Update'

**8-** In the **text box**, provide an update of the project status. It is important to ensure the update is objective and suitable for sharing with all stakeholders including the client and internal F/CM stakeholders.

**9-** Click on the **save button** at the top left.

**10-** For subsequent monthly updates, click ➕ Add button which will again open up a notes box.

**11-** Repeat steps 6 and 7.

**12-** In the text box, you can use the prior month's notes as a starting point, or start from scratch.

**13-** If using the prior month's notes, select that note prior to clicking the add button.  Click on the **Edit** button.  Highlight and copy the notes.

| ✏ Edit | ➕ Add | 🗑 Delete | 🔁 Refresh | ▦ Layouts | |
|---|---|---|---|---|---|
| ITEM | DESCRIPTION | CREATED BY | CREATED DATE | EDITED BY | |
| | | | | | |
| 1 | Note 1 | 10315 - kali27 | 12-21-2022 | 10315 - kali27 | |

**14**- Click on the ➕ Add button after copying the notes.

**15-** .  For adding the notes, click on the text box then then use **Ctrl V** to paste in the prior notes.  Edit the notes to reflect the current status.

**16**- **Process Complete.**