Course 1

Project Management and Planning in Facilities Connect

In today's course, we will explore the following:

- Facilities Connect Overview
- Project Management / Planning Process
- Training Look Ahead

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Section 1 | **Facilities Connect Overview**

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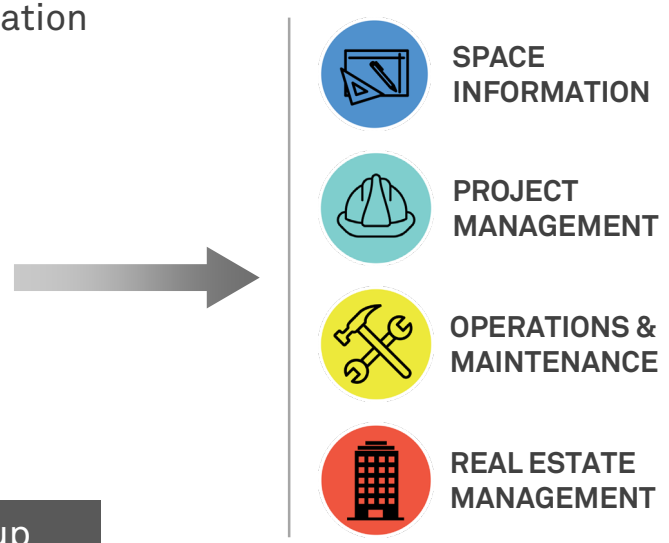
I've heard that NU Facilities is implementing Facilities Connect, but what is it exactly?

In the marketplace, **Facilities Connect** is a type of enterprise system known as an **Integrated Workplace Management System (IWMS)**

- Industry leading building and facilities management tool designed and developed by IBM (incl. 33 higher education organizations)
- Cloud-based, software-as-a-service (SaaS)
- Comprised of several modules governing separate and interrelated business processes
- Able to utilize emerging Internet of Things (IoT) technologies to gather data from connected assets
- Configurable, role-based system delivering user group specific workspaces and experiences



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Why has NU Facilities chosen Facilities Connect? Why now?

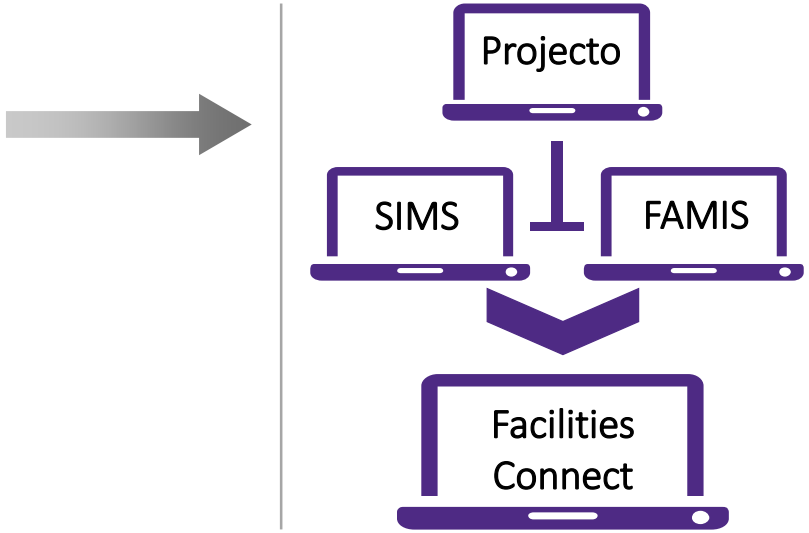
In short, for a variety of reasons…

1. Replace three legacy tools with one platform, seamlessly integrated with other University enterprise systems for real-time information sharing

2. Legacy tools are reaching end of life; do not support new, mainstream features; and cannot be integrated with one another

3. Provides alignment and support for NU Facilities strategic objective of Operational Excellence

4. Large-scale, enterprise system implementations require considerable lead time to accomplish the planning, design, development, testing, and training necessary to launch a new system



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What are the immediate benefits that Facilities Connect will provide for NU Facilities?

Enhance Service Delivery

Integrated platform streamlines and centralizes Facilities Management processes

Clarify Processes

Refined processes offer more clarity in roles and responsibilities

Increase Transparency

Real-time metrics and reporting encourage responsiveness and accountability

Improve Access

Customer portal provides easier access to services and better information

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What will Facilities Connect provide for Capital Programs?

OVERALL

- Improved Transparency and Collaboration
- Project Visibility and Reporting (organization-wide)
- Process Standardization and Data Consistency
- Integrated, real-time facilities data
- Cumulative facility histories including space, project, and maintenance data

PROJECT INFORMATION

- Structured Project Scope creation leveraging embedded Space Information data
- Assignable internal / external project contacts
- Access and reporting across NU Facilities portfolio of projects
- Organized data repository for key project documents such as RFIs, Permits, Potential Change Orders, etc.

WORKFLOW

- Consistent project phases and phase task organization
- Pre-configured, editable project schedule templates
- Ability to create, attach, and store weekly project reports meeting minutes, and correspondence within each project

FINANCIAL MANAGEMENT

- Integrated Budgets, Purchase Orders, and Invoices (NU Financials) for capitalized projects
- Straightforward, centralized original budget creation and management for non-capitalized projects

HISTORICAL PROJECT DATA / METRICS

- Calculated metrics (e.g. cost/sq. ft.)
- Vendors used and associated services, products, and materials
- Building history - visibility of historic and concurrent projects

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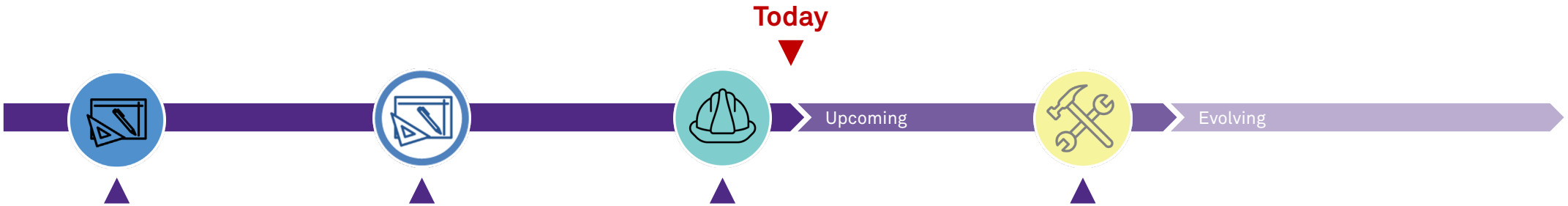
Today, we kickoff training for the Facilities Connect Project Management module

Where are we on the Facilities Connect journey?



Notes:
[1]PM customer access to rollout with Operations & Maintenance (Summer / Fall 2019)

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Section 2 | **Project Management and Planning Process**

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Project Management and Planning Process

Lifecycle

FACILITIES CONNECT PROJECT LIFECYCLE

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Project Management and Planning Process

Lifecycle

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Project Management and Planning Process

Major Process Steps

Initiate | **Setup** | **Execute** | **Manage** | **Closeout**

2

▼ Step	▼ Where	▼ Requirement
Request Capital Chartstring (If applicable)	CURRENT	When applicable
Create Project	FACILITIES CONNECT	Always
Add NU Facilities Project Contacts	FACILITIES CONNECT	Always
Apply Large / Small Project Template NEW	FACILITIES CONNECT	Always
Create Draft / Save Project NEW	FACILITIES CONNECT	Always

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Project Management and Planning Process

Major Process Steps

Initiate | **Setup** | Execute | Manage | Closeout

	▼ Step	▼ Where	▼ Requirement	▼ Frequency
	Add Primary Customer Contact	FACILITIES CONNECT	When applicable	Project Initiation
	Add Supplemental Project Information	FACILITIES CONNECT	Always	Project Initiation (update as necessary)
	Add Project Scope	FACILITIES CONNECT	Always	Project Initiation (update as necessary)
3	**Create Project Schedule**	FACILITIES CONNECT	Always	Project Initiation
4	**Establish Project Budget**	FACILITIES CONNECT	Always	Project Initiation

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Project Management and Planning Process

Major Process Steps

Initiate | Setup | Execute | Manage | Closeout

	▼ Step	▼ Where	▼ Requirement	▼ Frequency
3	**Apply and Complete Project Phase Checklists** NEW	FACILITIES CONNECT	Always	As Necessary

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Project Management and Planning Process

Major Process Steps

Initiate | Setup | Execute | Manage | Closeout

	▼ Step	▼ Where	▼ Requirement	▼ Frequency
	Update Internal / External Project Contacts NEW	FACILITIES CONNECT	When applicable	As Necessary
3	**Create Project Reports**	FACILITIES CONNECT	Always	Weekly NEW
	Add Permit Record(s)	FACILITIES CONNECT	When applicable	As Necessary
3	**Maintain Project Schedule**	FACILITIES CONNECT	Always	As Necessary
4	**Manage Project Budget**	FACILITIES CONNECT	Always	As Necessary
	Update and Load Supporting Project Documentation • Request for Information (RFI) • Punch List(s) • Issue Item(s) • Risk Item(s) • Potential Change Order(s)	CURRENT (CREATED) → FACILITIES CONNECT (RESIDES)	Optional	As Necessary

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Project Management and Planning Process

Major Process Steps

Initiate | Setup | Execute | Manage | Closeout

▼ Step	▼ Where	▼ Requirement	▼ Frequency
Closeout Project Phase Checklist NEW	FACILITIES CONNECT	Always	At Project End
Transition Project Ownership	FACILITIES CONNECT	Always	At Project End

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Section 3 | **Training Look Ahead**

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Facilities Connect Project Management Training

What to expect

COURSES

Beginning 12/3

1 Project Management and Planning in Facilities Connect

- Why Facilities Connect?
- Understanding Processes
- Training Look Ahead

2 Intro to Facilities Connect and Creating a Project

- System Orientation
- Project Creation

3 Updating and Managing a Project in Facilities Connect

- Updating Project Information
- Project Phase Checklists
- Working with Schedules

4 Project Financial Management in Facilities Connect

- Financial Management
- Budget Creation (Non-Cap)
- Budget Revision (Non-Cap)

TRAINING PROJECT

User-Developed Project (in Facilities Connect)

SUPPORT

TRAINING DOCUMENTS

OPEN LABS (1:1)

JOB AID DOCUMENTS

FAQS / SUPPORT

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Facilities Connect Project Management Training

Course Calendar

DECEMBER 2018

WK	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
1	3 1 Project Management and Planning in Facilities Connect 1-2pm (EV – 2020 Ridge)	4 1 Project Management and Planning in Facilities Connect 10-11am (EV – 2020 Ridge)	5 2 Intro to Facilities Connect and Creating a Project 10-11:30am (Norris – 205A Louis North)	6 2 Intro to Facilities Connect and Creating a Project 2-3:30pm (Norris – 102 Evans)	7 3 Updating and Managing a Project in Facilities Connect 10-11:30am (Norris – 208 Armadillo)
2	10 3 Updating and Managing a Project in Facilities Connect 2-3:30pm (Norris – 208 Armadillo)	11 4 Project Financial Management in Facilities Connect 10-11:30am (Norris – 208 Armadillo)	12 4 Project Financial Management in Facilities Connect 2-3:30pm (Norris – 208 Armadillo)	13	14
3	17	18	19	20	21

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Facilities Connect Project Management Training

Support Calendar

DECEMBER 2018

WK	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
1	3	4	5 **Open Lab** 2-4pm (EV – 2020 Ridge)	6 **Open Lab** 9-11am (EV – 2020 Ridge)	7 **Open Lab** 2-4pm (EV – 2020 Ridge)
2	10 **Open Lab** 9-11am (EV – 2020 Ridge)	11 **Open Lab** 2-4pm (EV – 2020 Ridge)	12 **Open Lab** 9-11am (EV – 2020 Ridge)	13 **Open Lab** 9-11am (EV – 2020 Ridge)	14 **Open Lab** 2-4pm (EV – 2020 Ridge)
3	17 **Open Lab** 2-4pm (EV – 2020 Ridge)	18 **Open Lab** 2-4pm (EV – 2020 Ridge)	19 **Open Lab** 2-4pm (EV – 2020 Ridge)	20 **Open Lab** 2-4pm (EV – 2020 Ridge)	21

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Facilities Connect Project Management Training

Courses + Support Calendar

DECEMBER 2018

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Conclusion

Wrap Up

A few important reminders…

1. **Courses #2-4 require your laptop;** if you need a loaner, and have not already made arrangements, please email Scott Reiter (scott.reiter@northwestern.edu)
2. **Test your Wi-Fi connectivity.** If you encounter any issues, please stop by FMIT for assistance.
3. **Test your internet browser (Chrome and Firefox are preferred).** Make sure you are able to access the Facilities Connect training page (link below) and login with your NetID.

   https://northwestern-qa.tririga.com

   Please see FMIT if you have any access / login issues.
4. **Be sure your laptop is fully charged prior to arrival for courses #2-4!**

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Conclusion

Feedback and Questions

FEEDBACK / Q&A	**We would like to hear your feedback on today's course and your questions regarding Facilities Connect** Your input will help guide our ongoing Facilities Connect training and support efforts Please send your feedback and questions to **FPMFeedback@northwestern.edu**

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