

FACILITIES CONNECT: Advisory Group Meeting #7

OCTOBER 1, 2019

TODAY'S AGENDA

#	ITEM	TIME	SPEAKER
1	Facilities Connect and Facilities	10	Alex Darragh
2	Facilities Connect Release Schedule	5	Scott Reiter
3	Module Updates and Sneak Peek of O&M Features	30	Scott Reiter, Jim McKinney, Matthew Ridge
4	Approvals	20	Scott Reiter
5	Training & Support Plan	10	Matthew Ridge
6	Q&A	15	

FACILITIES CONNECT OVERVIEW

Facilities Connect contributes to the delivery of a safe, sustainable, and reliable operating environment. Facilities Connect supports Facilities' operating tenets:

Be One Team

Centralized and integrated platform that tracks and manages workplace information at every stage of the facilities lifecycle



Focus on Customers

Single desktop to view facilities information, perform self-service and validation activities, and access revamped, customer-centric Facilities services for request



Always Improve

Highly-scalable platform that allows for expanded use of capabilities and future integrations with more data sources



Know The Business

Real-time metrics and data updates through integrations with NU Enterprise systems



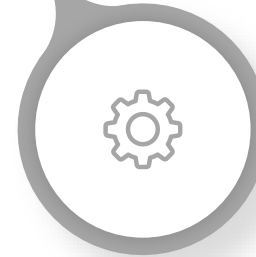
Be Transparent and Open

Up-to-date financial information for projects and work tasks and direct ownership of non-building charge approvals



Meet Commitments

More reliable and timely services to maintain University assets with improved data capture to perform analysis of metrics and business operations.






Facilities
Operating
Tenets


FACILITIES CONNECT RELEASE PLAN


Facilities Connect will launch new Operations & Maintenance (O&M) functionality to replace the existing FAMIS work order management system.

2018

- ✓  Space Information
- ✓  Space Validation
- ✓  Project Management (Facilities Only)

2019

- ✓  **Operations & Maintenance (Building Blocks)**
 - Building Assets
 - Vehicles, Tools, Test Equipment
 - Lock Out Tag Out Procedures

-  **Operations & Maintenance (Core)**
 - Corrective Maintenance
 - Preventive Maintenance
 - Inventory Management
 - Key Requests
 - Time Tracking
 - Job Costing
 - Mobile Tools

Expected
Dec
2019

✓ = Released



SPACE MODULE UPDATE

- **2019 Space Validation** closed on 9/20. Approximately, 90% was complete.
- Following up with the remaining open areas and cleansing the data.
 - Crucial to quickly complete these open areas
- Goal is to reopen for FY20 by mid November
- Improvements to the Campus Mapping Tool are currently in testing (planned to release with the FY20 launch)
 - View aerial photos for previous years
 - Additional tools and data layers
 - Simplification of maps – combining campuses
 - And more



FACILITIES CONNECT O&M CUSTOMER FEATURES

Facilities Connect O&M module will deliver impactful improvements to the NU Facilities customer experience, including:



A centralized, one-stop shop to access and interact with NU Facilities services and information



Improved service request management with new progress-based notifications and integrated service request history



Automated dispatch of service request types that do not require approvals, allowing customer approvals to focus where controls are needed



Automated prioritization of work tasks for greater consistency in service delivery, governed by new, transparent service level expectations



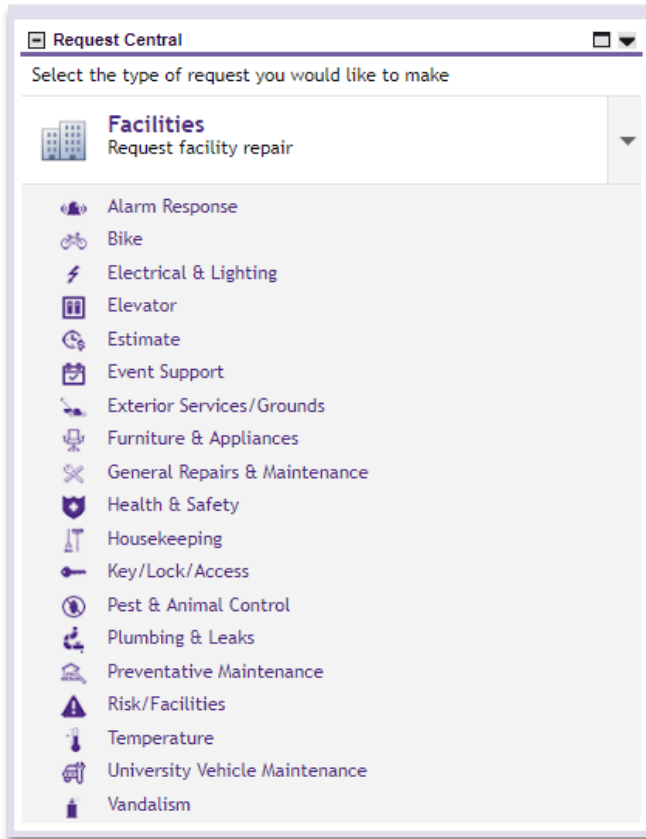
Allow for multiple requestors within each department / unit with accurate request routing for any required service approvals



Track and trace service requests, encouraging responsiveness and accountability



REQUESTER EXPERIENCE



Revamped Request Classes,
Improved Terminology, More
Intuitive

My Active Requests

Request ID	Request Classification	Description	Created Date/Time	Requested For	Requester
SR-1000837	Estimate Request	178:Create an Estimate for a Work Task	08/22/2019 15:47:24	cstGeneralRequestor,cstGeneralRequestor	cstGer
SR-1000833	Fix/Replace Window Blinds	12:Work Task Rejected	08/22/2019 11:16:55	cstGeneralRequestor,cstGeneralRequestor	cstGer
SR-1000829	Furniture & Appliances Other	test	08/21/2019 17:50:34	cstGeneralRequestor,cstGeneralRequestor	cstGer
SR-1000828	Recycling Bin	test	08/21/2019 17:45:46	cstGeneralRequestor,cstGeneralRequestor	cstGer
SR-1000827	Fix/Replace Window Blinds	75:Completes Work (Work Task has multiple Workgroups)	08/21/2019 13:26:14	cstGeneralRequestor,cstGeneralRequestor	cstGer
SR-1000826	Fix/Replace Window Blinds	10: Add Resources (in same workgroup)	08/21/2019 11:49:24	cstGeneralRequestor,cstGeneralRequestor	cstGer
SR-1000825	Fix/Replace Window Blinds	178: Create an Estimate for a Work Task	08/21/2019 10:12:28	cstGeneralRequestor,cstGeneralRequestor	cstGer
SR-1000824	Fix/Replace Window Blinds	178: Create an Estimate for a Work Task	08/21/2019 10:04:30	cstGeneralRequestor,cstGeneralRequestor	cstGer
SR-1000821	Fix/Replace Window Blinds	15: Add Comment/Photo/Document	08/16/2019 11:38:18	cstGeneralRequestor,cstGeneralRequestor	cstGer
SR-1000818	Room Lockout	The door is locked to my office and I do not have a key	08/16/2019 09:56:53	cstGeneralRequestor,cstGeneralRequestor	cstGer

Requests For Someone Else

My Request History

Summary views with up to date status and
important notifications.



APPROVER EXPERIENCE

Reminders - Request Central

- 1 - Action Items
- 10 - Notifications
- 0 - My Pending Surveys

Dashboard of 'Action Items' awaiting approval.

Home > Requests > Action Items
[Open In New Window](#)
[Add to Bookmarks](#)
[My Bookmarks](#)

Action Items Accept

Action	Record Name	Type	Due	Status	From
<input type="checkbox"/> Required Review	1295816 - Service Request-SR-1000615-0-1295816	Approval	09/25/2019 15:45:18	ASSIGNED	GeneralRequestor, Training - 5004520

From: wasadmin@x00192.cds.tririga.com <wasadmin@x00192.cds.tririga.com>
Sent: Wednesday, September 25, 2019 3:45 PM
To: Gail R L Renfrow <g-renfrow@northwestern.edu>
Subject: Facilities Connect Action Item - Required Review (1295816 - Service Request-SR-1000615-0-1295816)

You have been assigned an Action Item in Facilities Connect.

Action Item: Required Review
 Record: 1295816 - Service Request-SR-1000615-0-1295816 (triApproval)
 Assigned at: 09/25/2019 15:45:18
 Assigned By: GeneralRequestor, Training - 5004520

[Approve](#) [Return](#)

Links

- [Record for Approval](#)

eMail Push Notification for Items Awaiting Approval



APPROVALS

What needs approving?

- Requests for discretionary services funded by customers/departments
 - 💡 *Facilities Connect calls these 'Non Building Charges'*
- Facilities Connect automatically knows which charges are Non Building based on the request type.
- Non Building charges will require a chart string to be entered.

Why are there approvals?

- Facilities Connect enables any staff/ faculty to directly submit Facilities requests
- Provides departments the ability to self-control discretionary spending

What is the role of an approver?

- To approve or deny the work/ expenditure
- All non building work must be approved before the system sends it to Facilities
- Single-step approval only (no multiple-step approval steps)



Examples of Items Requiring Approval

Requests for Furniture & Appliances
Hanging Bulletins/ Whiteboards/ TVs
Painting
Shelving & Pictures Hanging
Additional Housekeeping Services
Flooring Replacement
Interior Signage
Portable Lamp Maintenance
Key Requests
Bike Removal/ Bike Lock Cutting
Bike Repair Station Maintenance
Etc.



APPROVALS

Who is the approver?

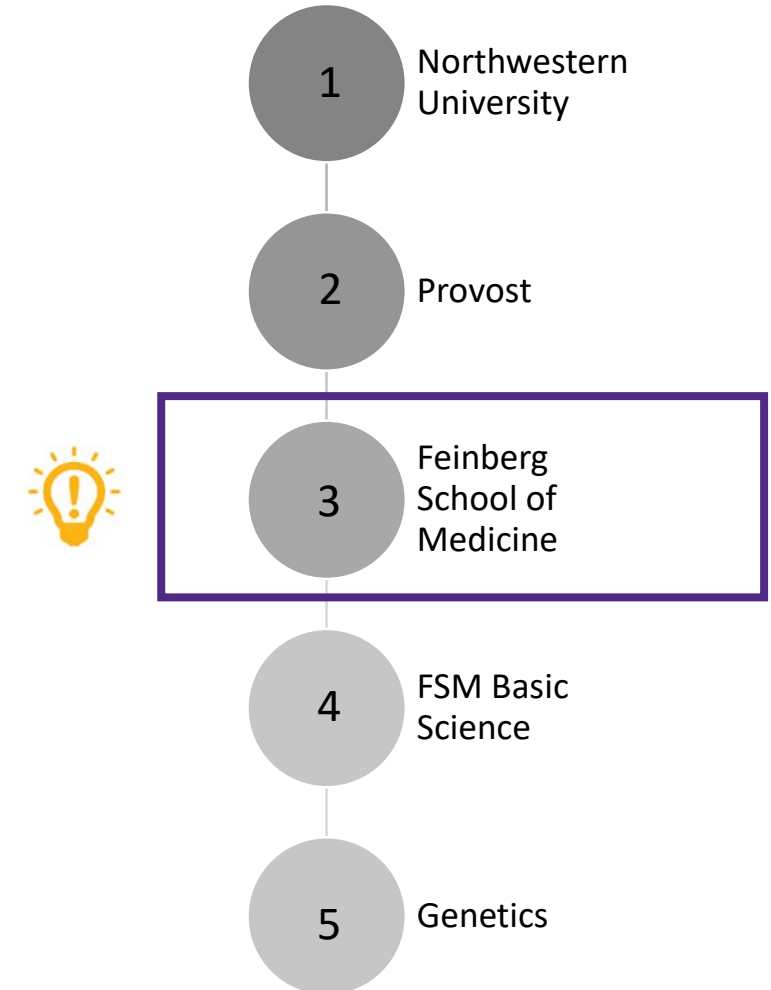
- Approver is derived from the chart string entered in the service request
- Departments determine (ahead of time) which level in their chart string department hierarchy to use for approvals for service requests (school, department, etc)
 -  *To reduce the amount of maintenance, Facilities recommends the highest level of the hierarchy (least granular) that is appropriate (e.g. school level)*
- Departments (ahead of time) identify people to be the approvers for the selected level
 -  *To cover absences, multiple people should be identified; first to take action will move the request thru the process*

TO DO: Verify/name your approvers for each area

SEND TO: FacilitiesConnect@northwestern.edu

DUE BY: 10/18

Sample Chart String Hierarchy





TRAINING RESOURCES



Will I need to attend Facilities Connect training?

- No, you will not have classroom training for the upcoming release of Facilities Connect

What training resources will be available?

- Training materials for the Service Request and Approvals process will be available in the form of detailed job aids (see example from Space on the right)
- Facilities Connect job aids will be organized in collections by FC user group; these materials will provide versatility for both on-demand user training and desktop quick reference
- Training topics will include:
 - Create a New Service Request
 - View an Existing Service Request and Service Request History
 - Cancel an Existing Service Request
 - Review and Approve Service Requests (for Non-Building Charges)

When will I be able to access training resources?

- Training resources will be available **approximately 1-2 weeks prior to Facilities Connect O&M module release**
- The FC team will send a communication (with link) indicating training resources have been released

ILLUSTRATIVE: Detailed Job Aid - 1 Page Layout (Front and Back)

Clearly displayed topic / process and applicable user group information

Highly visible, numbered layout provides sequential reference to major steps and associated user actions

FRONT ▲

Straightforward and easy to follow step-by-step instructions and corresponding screenshots

BACK ▼

Supporting information, terminology, side-by-side comparisons, and additional details where necessary



TRAINING RESOURCES



Where do I go to access Facilities Connect training resources?

- All training resources will be available on the **Facilities Connect website** (www.northwestern.edu/fm/connect)
- The **Training** page (shown on the right) contains a directory of training resources by Facilities Connect module and user group
- Training resources for the upcoming release will be available in the **Operations & Maintenance** section of the Training page

SERVICES PROJECTS ON CAMPUS ABOUT US FOR CONTRACTORS FOR STAFF FACILITIES CONNECT PORTAL

Northwestern | FACILITIES

SEARCH

Home > Facilities Connect > Training

Facilities Connect

- News
- Modules
- Meet the Team
- Training**
- Videos
- Resources
- FAQ
- Login

Training

Northwestern | FACILITIES CONNECT

We are glad you joined us to learn about Facilities Connect! Below is a summary of the available training curriculum and courses for Facilities Connect and each of the modules. Training includes an overview video, eLearning, and supplemental job aids which are all available in myHR Learn.

- > Facilities Connect Overview
- > **Operations & Maintenance**
 - > Asset Managers
 - > Service Technicians
 - > Supervisors
 - > Customer Service
 - > Service Requester

Northwestern University

Facilities 2020 Ridge Avenue, Evanston, IL 60208
Evanston Campus - Phone: 847.491.5201
Chicago Campus - Phone: 312.503.8000 Fax: 312.503.4106
Email: facilities@northwestern.edu

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SUPPORT PLAN



Who should I contact for ongoing Facilities Connect support?

- Northwestern Information Technology (NUIT) will provide user support for Facilities Connect on an ongoing basis
- Visit the **NUIT Support Center** (it.northwestern.edu/supportcenter) for a variety of contact options, IT service alerts, walk-up locations, and more.
- You can always contact NUIT Support directly
 - **By Phone:** (847) 491-4357 (1-Help)
 - **By Email:** consultant@northwestern.edu

The screenshot shows the Northwestern Information Technology website's 'Get Help' page. The page is organized into a grid of eight service tiles, each with a distinct icon and a call-to-action button at the bottom.

Service Category	Icon	Text	Call to Action
Knowledge Base	Question mark	Self-help for answers to common questions	SEARCH THE KNOWLEDGE BASE
NetID and Password	Lock	Instructions for managing your NetID	UPDATE YOUR INFORMATION
Trouble Logging In?	Laptop	Self-help instructions for common log in issues	GET INSTRUCTIONS
IT Service Alerts	Warning sign	View all scheduled maintenance and service alerts	STATUS OF UNIVERSITY IT SERVICES
Call	Headset	Call the Technology Support Center for assistance	847-491-4357 (1-HELP)
Email	Envelope	Send us information about your issue along with your NetID	CONSULTANT@NORTHWESTERN.EDU
Chat	Chat bubbles	Chat with the Technology Support Center	CHAT LIVE WITH AN IT CONSULTANT
Walk-in Help	Location pin	Stop by our University Library location in Evanston for assistance	HOURS AND LOCATION

Q&A



Questions or Feedback? Please email the Facilities Connect team at:

FacilitiesConnect@northwestern.edu

For the latest information, visit the Facilities Connect website (news, training, FAQ, Team List):

www.northwestern.edu/fm/connect