PROJECT MANAGEMENT



PROJECT MANAGER

LOCATE CAPITAL PROJECT WORK TASKS

Provides guidance for locating Capital Project Work Tasks in Facilities Connect.

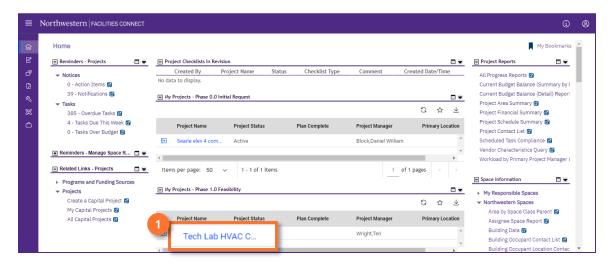
▼ GETTING STARTED

There are two main ways to access the Project Record. For more information on **FC Desktop** access and navigation, please refer to **the Project Manager: Basic Navigation** job aid.

DIRECTIONS:

Option one: from the FC Home Screen,

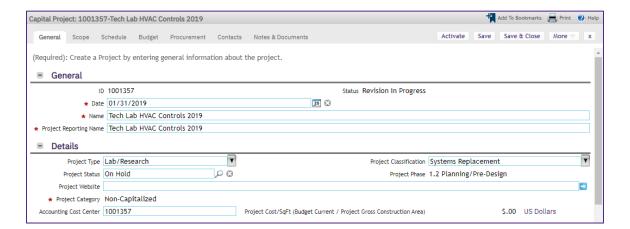
1 Click on the **Project Name** from the Phase section.



▼ INFORMATION

When you are on the on the Projects tab, in Company Focus, the **center column** shows you all the projects you are assigned to by phase in descending order.

Upon clicking, the **Capital Project record** will open in a new window.



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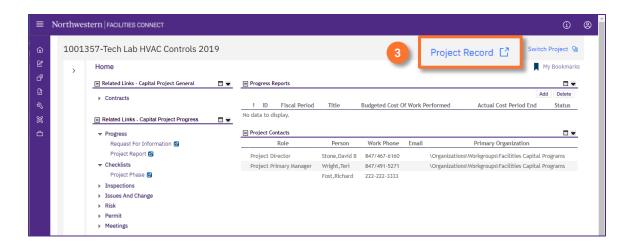
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DIRECTIONS:

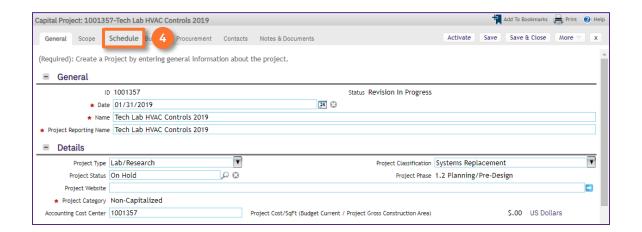
Option two: from the **Project Focus** screen,

On the Projects tab, click on the Project Record button.



Upon clicking, the **Capital Project record** will open in a new window.

4 Click on the Schedule tab.



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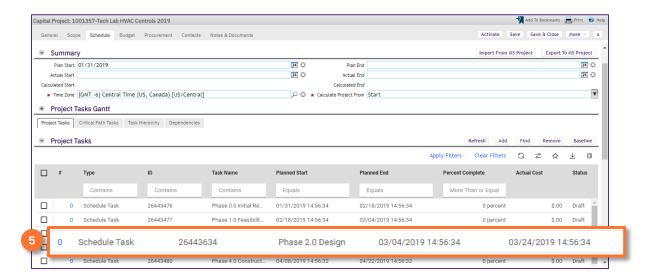
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DIRECTIONS:

On Schedule Tab, scroll down to the Project Tasks section, locate the Work Task you wish to view.

5 Click on the Work Task link.



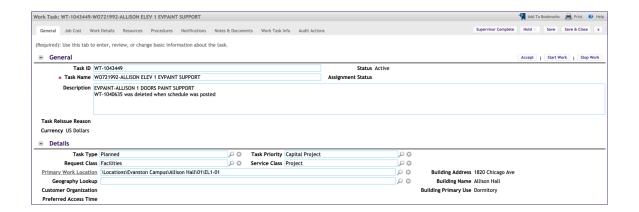
▼ INFORMATION

The tasks listed in the Project Task section include both Schedule Tasks and Work Tasks. Schedule Tasks are tasks to indicate the phase of the Project. The Work Tasks are the tasks created to complete the actual work for the Project.

When looking at the Type column, remember that it is in alphabetical order. Therefore, all Work Tasks related to the Project will be at the bottom of the list.

6 Upon clicking

Upon clicking, the Work Task will open.



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DIRECTIONS:



Continued. Across the top of the Work Task are tabs which take you to different sections where you can view information and perform various transactions.



- General: the General tab contains all the general information on the Work Task. Information including: the location, description of the work, link to the associated Service Request, the Responsible Organization, the Planned Start and Planned End, etc.
- Work Task Info: the Work Task Info tab shows a view containing information from several tabs. There is a combined view of general information, Resources, Time Log, Material, Parts, Equipment, and the linked Service Request.
- Job Cost: the Job Cost tab contains all the financial details related to the Work Task. Some of the information includes: Cost Summary, Billing Allocation, Billing Type, etc.
- Work Details: the Work Details tab contains several sub-tabs, most of which are duplicate information found elsewhere on the Work Task. Some important sub-tabs to note are: Assets, Work Analysis (Resolution), Hold Log, etc.
- Resources: The Resources tab contains information on Resources, Materials, Parts, and Equipment. From this tab you can add and remove Resources, view and add Time Entries, and view the Materials, Parts, and Equipment associated with the Work Task.
- **Procedures**: the **Procedures** tab lists the **Safety Procedures** associated with the **Work Task**. In this tab you have the ability to add and remove **Safety Procedures**.
- Notifications: the Notifications tab will have all the Notification Records associated with the Work Task. Also included: the list of Approvers (if applicable), a link to the Approval Record, and any Status Change Notifications (if applicable).
- Notes & Documents: The Notes & Documents tab contains all the Comments and Documents added to the Work Task.