PROJECT MANAGEMENT



# **Creating a New Project**



## CREATING A NEW PROJECT

## **DOCUMENT SUMMARY**

This job guide provides step-by-step instruction for creating a new project in Facilities Connect. The Financial administrator will create the new project record, then send it to the Project Manger to complete the details.

The purpose of this document is to serve as guided reference and/or new hire training on creating a new project, available to all applicable users in Facilities Connect.

## **VERSION INFORMATION (THIS DOCUMENT)**

Version 1.2 Release Date 07/15/2022

Owner **NU Facilities** 

Version The updated version of the document reflects the changes made to the Project Creation process in conjunction with Capital Projects and Finance

departments.

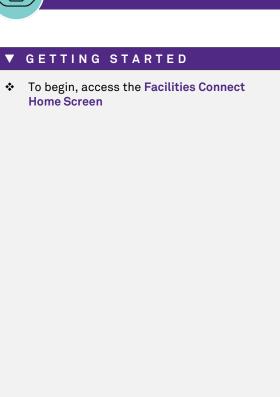
## **REVISION HISTORY**

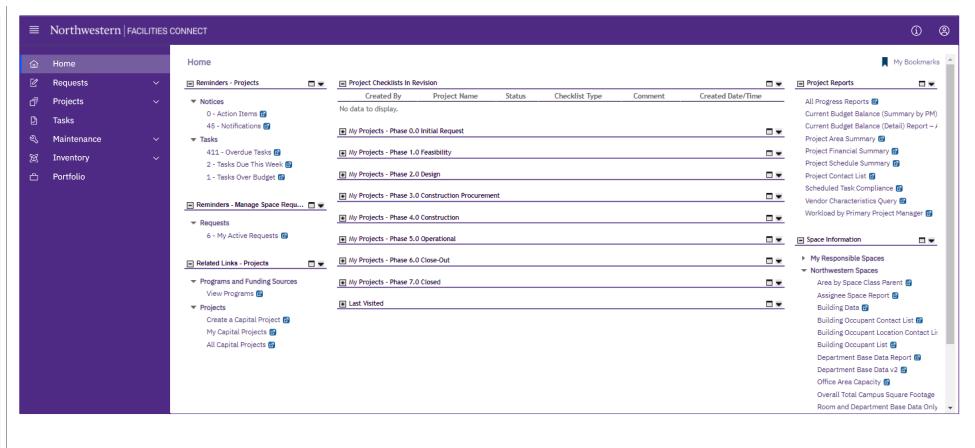
Most Recent →

Version	Release Date	Action	Owner
1.2	07/15/2022	Updated	NU Facilities
1.1	03/04/2022	Updated	NU Facilities
1.0	02/13/2019	Created	NU Facilities



HOME SCREEN (COMPANY FOCUS)





▶ PROCESS

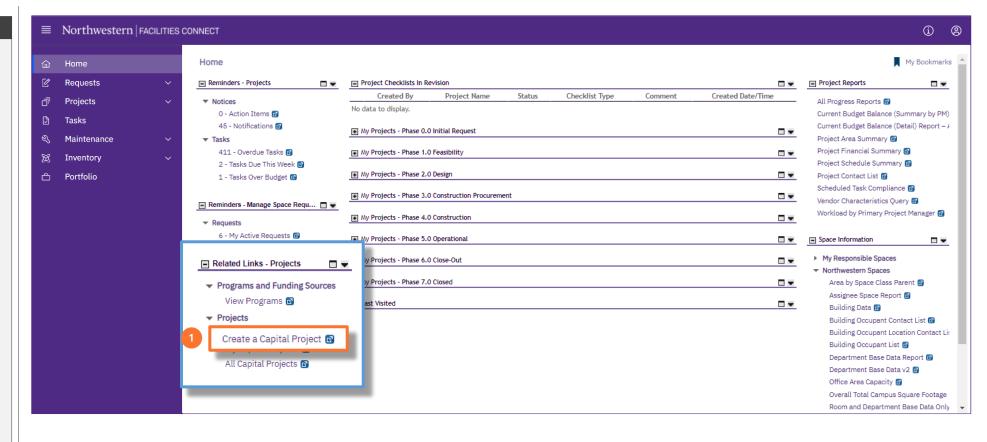


HOME SCREEN (COMPANY FOCUS)

#### **▼** PROCESS

 To begin a new project, locate the Related Links – Projects portlet (left side of screen) and click on Create a Capital Project

<<Upon clicking, the Capital Project Form will
open in a new window>>





#### **▼** PROCESS

- 2) Begin on the General tab of the Capital Project Form
  - Create a project name by completing the Name field; the Project Reporting Name field (also a required field) will auto-populate with your Name field entry

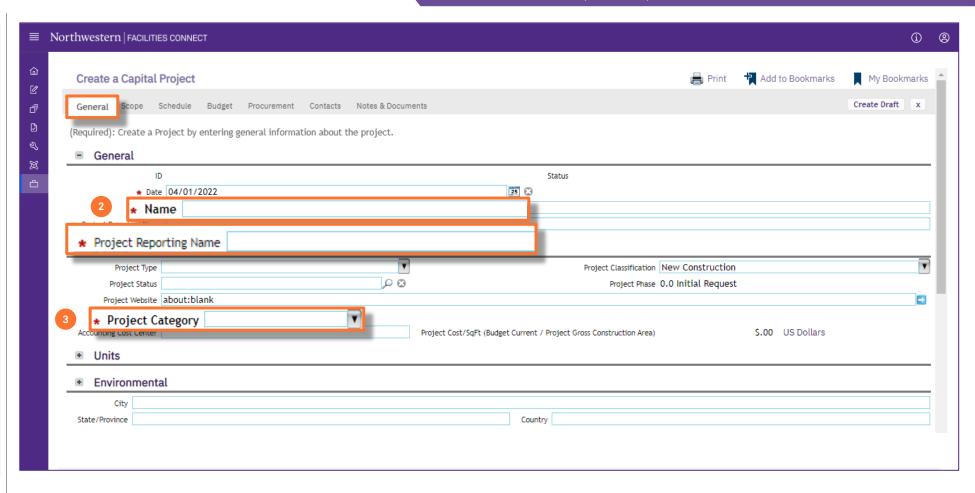
Note: All projects <u>must</u> be named using proper project naming conventions. Please refer to the **Project Naming Conventions** guide on the Facilities Connect website for guidance and more details

<u>Tip:</u> The <u>Date</u> field will pre-populate with the current date, but can be changed by directly editing the date in the associated content box or by clicking on the calendar icon (immediately to the right)

 Select the appropriate Project Category; use the dropdown arrow to select either Capitalized or Non-Capitalized

## **▼** IMPORTANT

The **Project Reporting Name** must match the name in the **Chartstring confirmation email** from the Budget office. If these names do not match, the financials will not match.





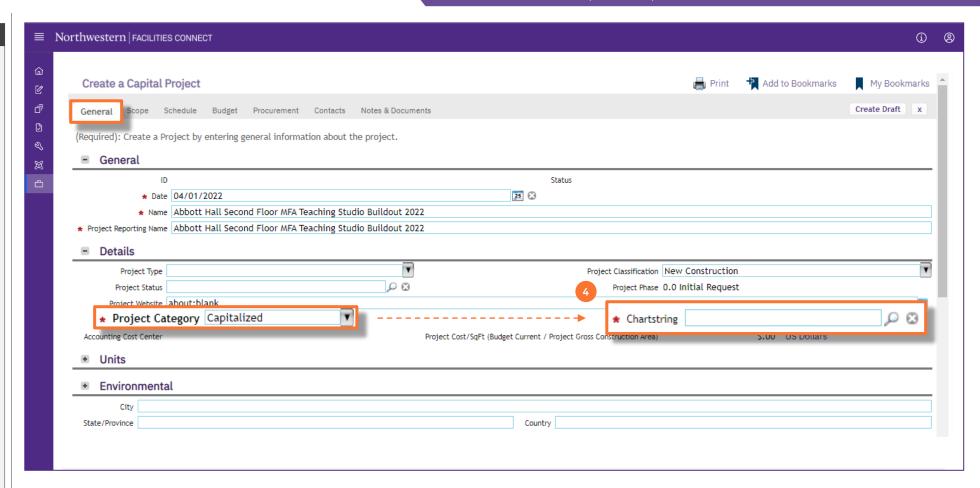
#### **▼** PROCESS

4) If Capitalized is selected for Project
Category, the Chartstring field will appear
on the right side of the screen

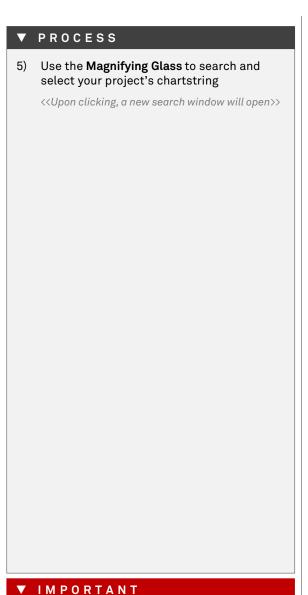
Note: All Capitalized projects require entry of a project chartstring in order to setup a new project. If you do not have a project chartstring at this time, consult with a Project Director on appropriate next steps.

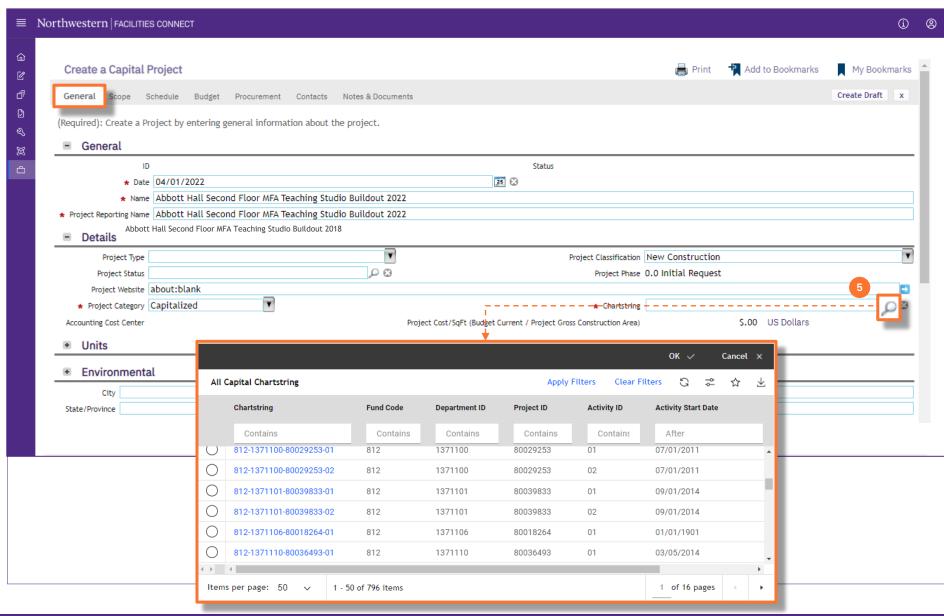
#### **▼** IMPORTANT

All projects must comply with <u>approved</u>
 <u>Naming Conventions</u>; please refer to the <u>Project Naming Conventions</u> guide on the Facilities Connect website for more details

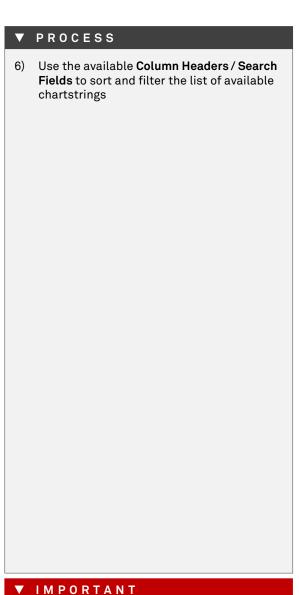


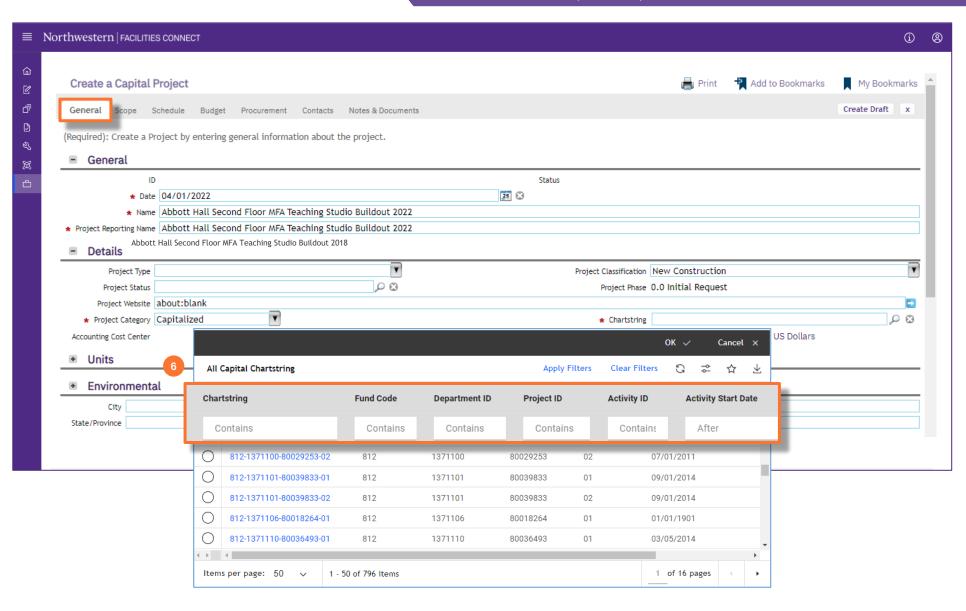




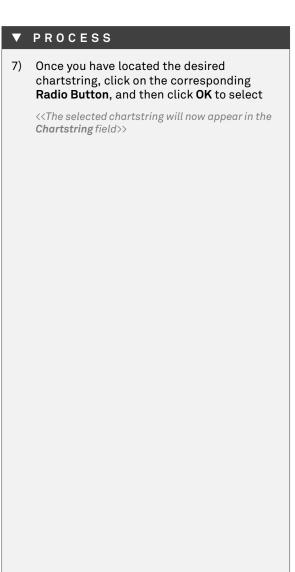


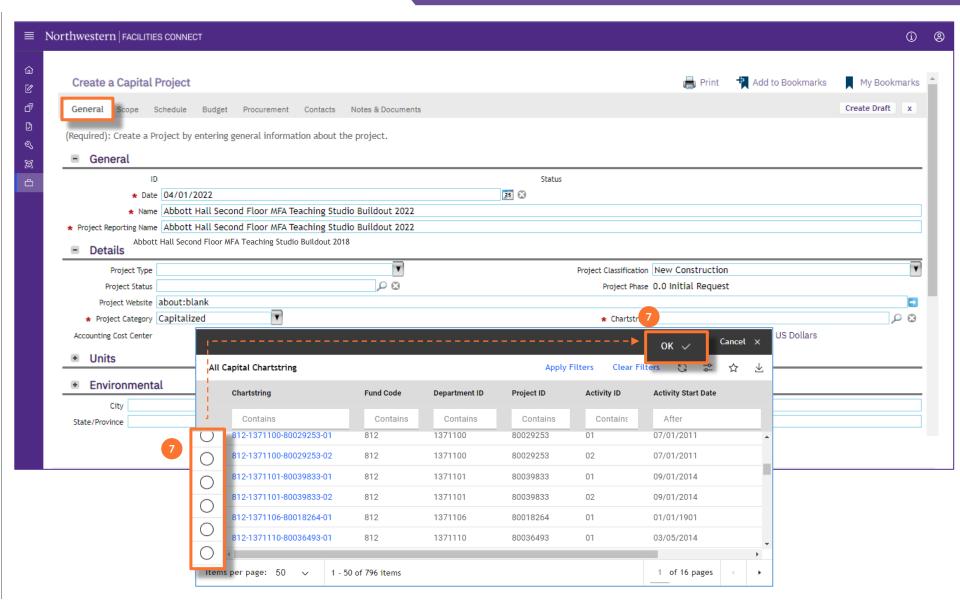




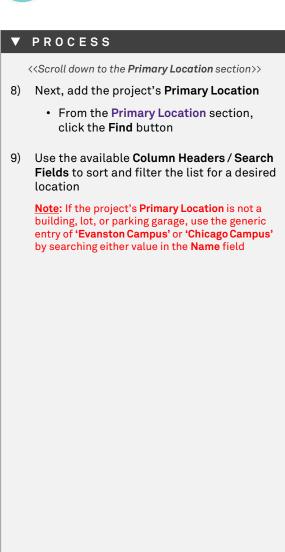


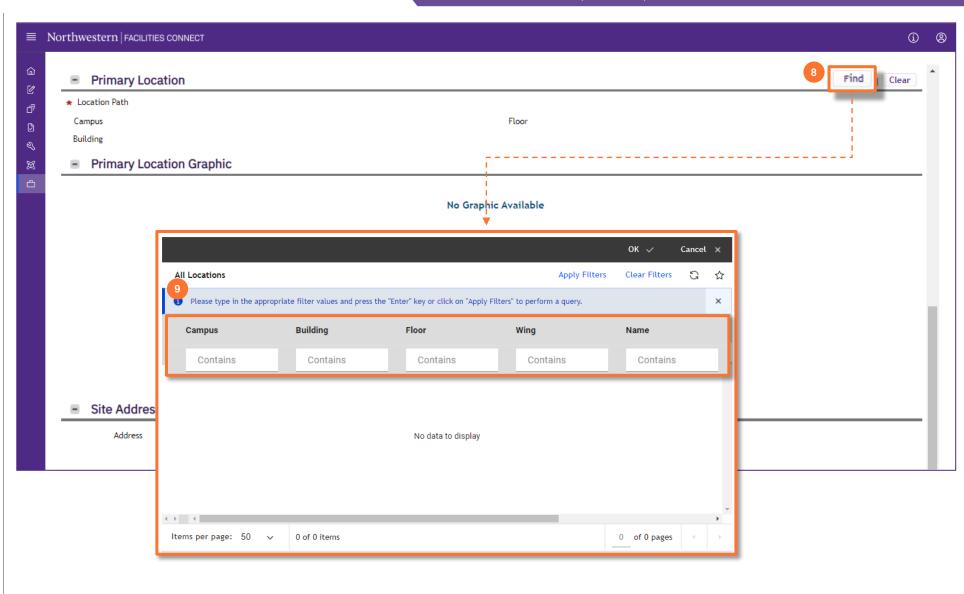










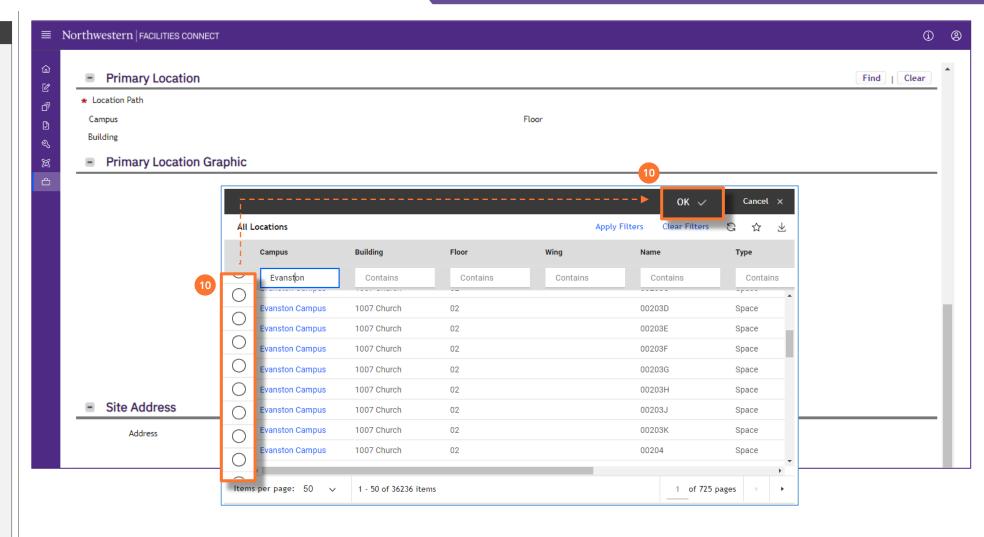




## ▼ PROCESS

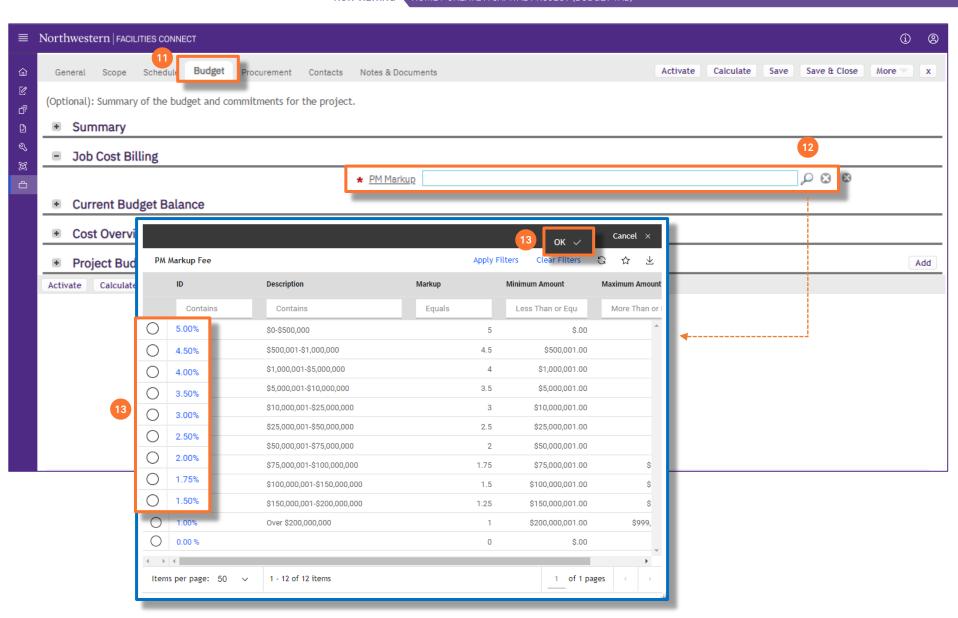
10) Once you have located the desired location, click on the corresponding **Radio Button**, and then click **OK** to select

Note: Once the Primary Location has been selected, the Site Address and Project Address sections will populate automatically





# **▼** PROCESS 11) Next, add the PM Mark Up Fee • To locate this portion of the form, click on the **Budget** tab 12) In the **Job Cost Billing** section, locate the PM Markup field. • Click on the magnifying glass <<Upon clicking, the PM Markup Fee options will open in a sub-window>> 13) In the PM Markup window, click the radio **button** that matches your budget • Click on OK to save your selection





#### **▼** PROCESS

- 14) Next, add the **Project Primary Manager** and **Project Director** responsible for the project
  - To locate this portion of the form, click on the Contacts tab
- 15) In the **Contacts** section under **Role**, click on **Project Primary Manager**

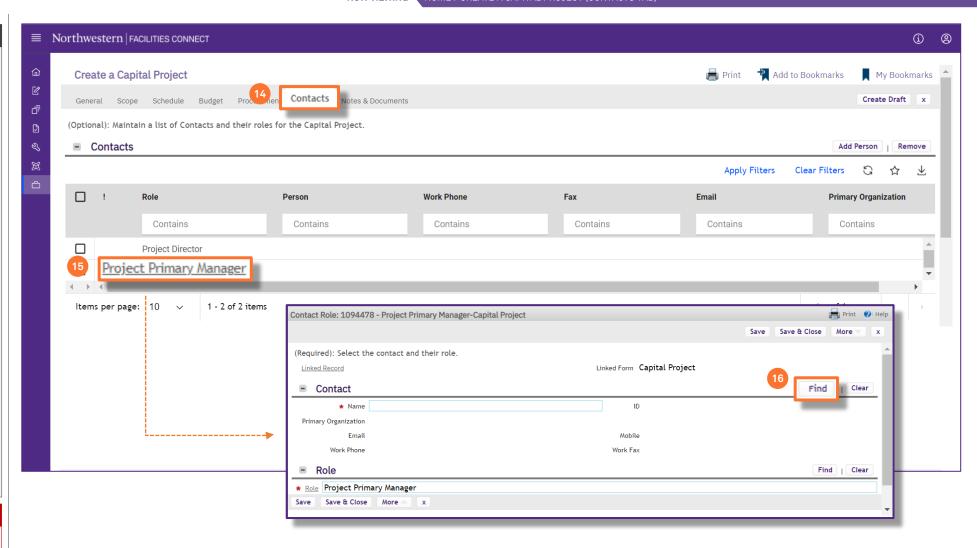
<<Upon clicking, the Contact Role Detail for the Project Primary Manager will open as a new window>>

16) In the Contact Role Detail window, click the Find button

<<Upon clicking, a new search window will open>>

## **▼** IMPORTANT

For additional information about adding contacts to projects, please refer to the Manage External Contacts OR Contacts Quick Add job guides.



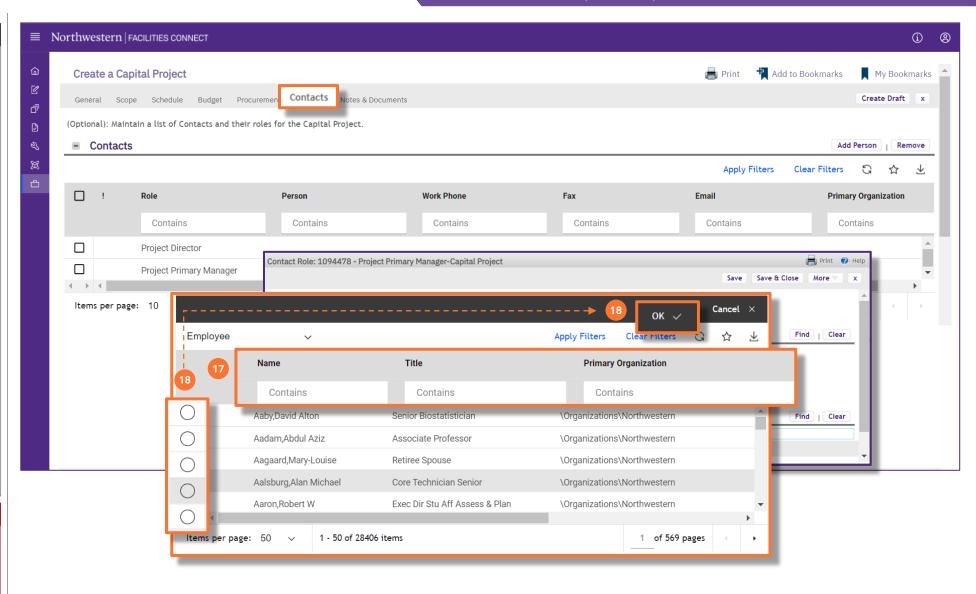


#### ▼ PROCESS

- 17) Use the available Column Headers / Search Fields to sort and filter the list of contacts to locate the desired project manager
- 18) Once you have located the desired project manager, click on the corresponding **Radio Button**, and then click **OK** to select

## **▼** IMPORTANT

For additional information about adding contacts to projects, please refer to the Manage External Contacts OR Contacts Quick Add job guides.



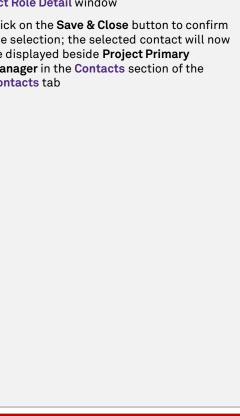


NOW VIEWING HOME > CREATE A CAPITAL PROJECT (CONTACTS TAB)

#### **▼** PROCESS

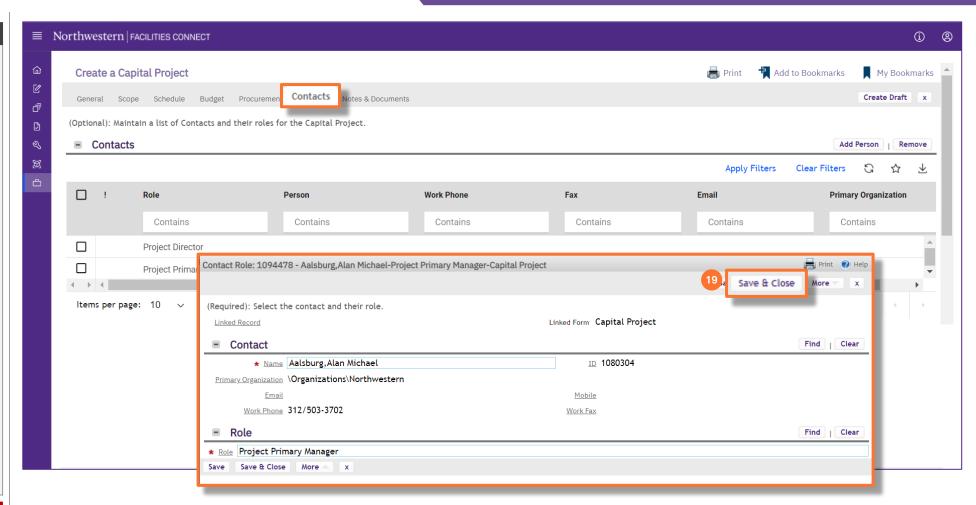
The selected contact and his/her information will now appear in the Contact section of the **Contact Role Detail window** 

19) Click on the Save & Close button to confirm the selection; the selected contact will now be displayed beside Project Primary Manager in the Contacts section of the Contacts tab



## **▼** IMPORTANT

For additional information about adding contacts to projects, please refer to the Manage External Contacts OR Contacts Quick Add job guides.





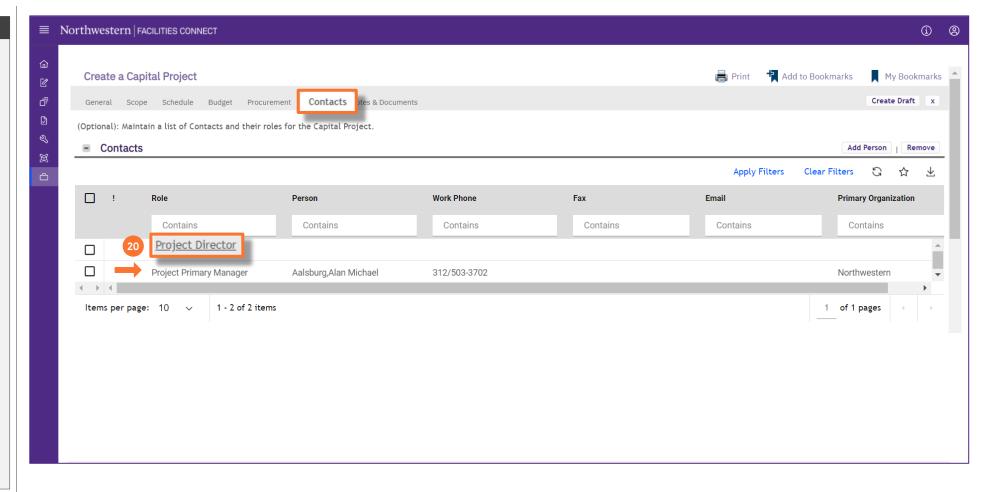
NOW VIEWING HOM

HOME > CREATE A CAPITAL PROJECT (CONTACTS TAB)

## **▼** PROCESS

The selected **Project Primary Manager** is now displayed for that role in the **Contacts** section of the **Contacts** tab

20) Next, repeat steps #12-16 to add a contact to the **Project Director** role



### **▼** IMPORTANT

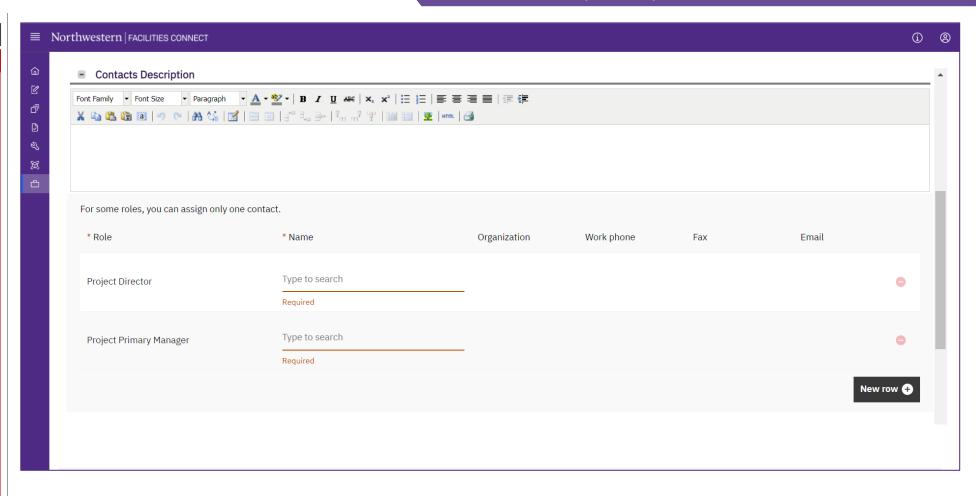
For additional information about adding contacts to projects, please refer to the Manage External Contacts OR Contacts Quick Add job guides.



## **▼** PROCESS

#### **▼** IMPORTANT

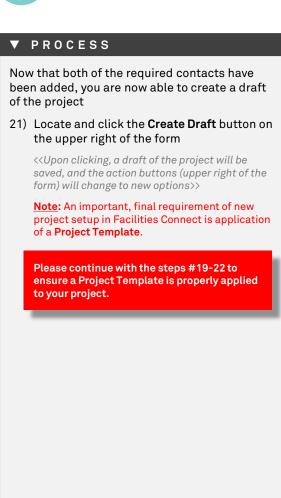
For additional information about adding contacts to projects using the Contacts Quick Add function, please refer to the Contacts Quick Add job guides.

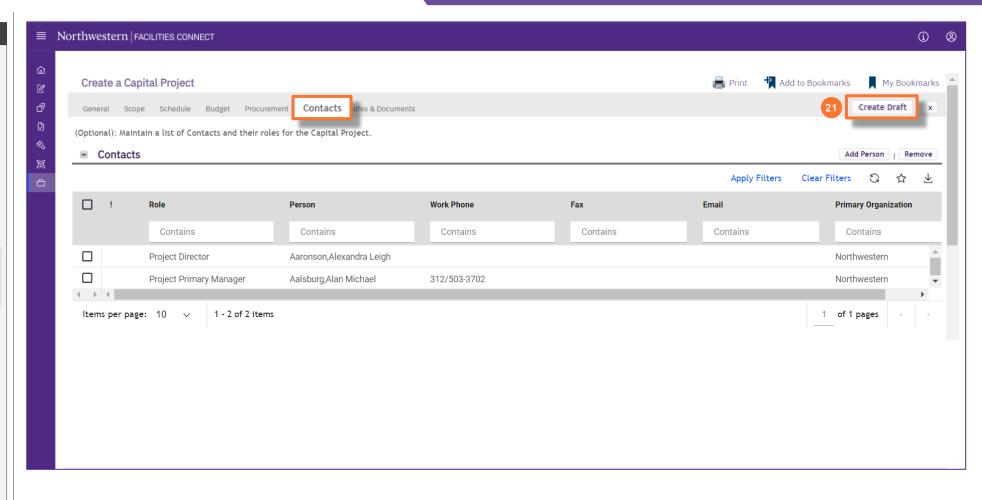




NOW VIEWING HOME > CF

HOME > CREATE A CAPITAL PROJECT (CONTACTS TAB)







#### **▼** PROCESS

## To apply a **Project Template:**

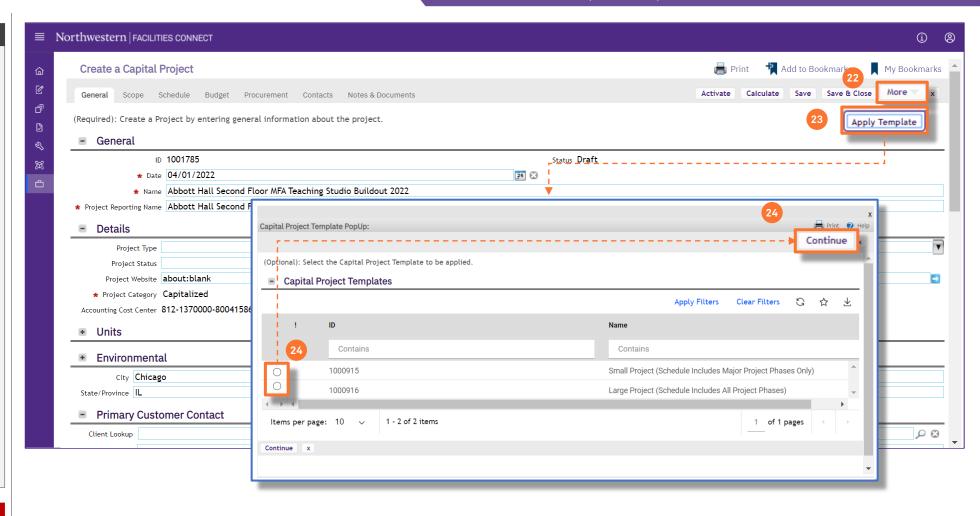
- 22) From the action buttons (upper right of the form), click on the **More** button
- 23) Next, click on the **Apply Template** option (will appear beneath the **More** button)

<<Upon clicking, a new search window will open>>

- 24) Select either the **Small** or **Large Project Template** 
  - Click on the **Radio Button** for the chosen template
  - Click the **Continue** button to confirm the selection

## , IMPORTANT

• It is important to save the project as you make any changes using the **Save** button.





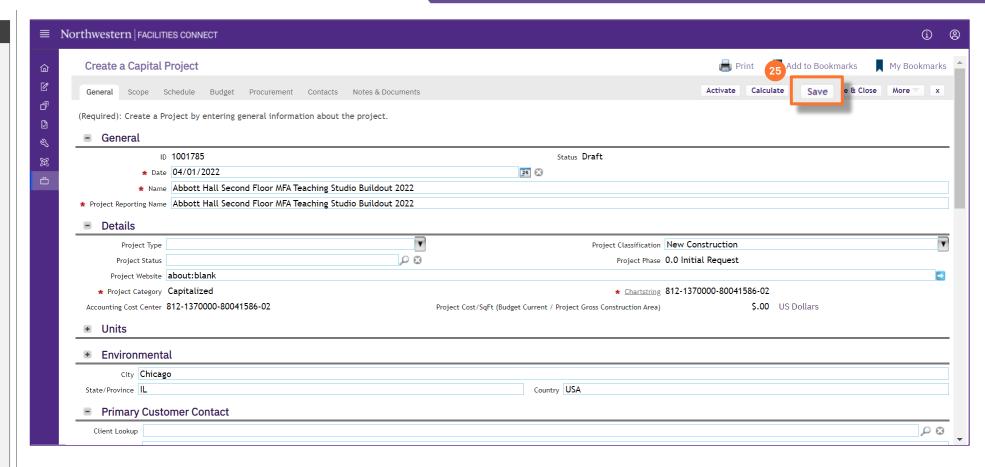
HOME > CREATE A CAPITAL PROJECT (CONTACTS TAB)

## ▼ PROCESS

25) Click on the **Save** button to save your project with the applied project template

#### **▼** IMPORTANT

 DO NOT Activate the Project. The Project Manger must add their information to the project record before it can be activated.

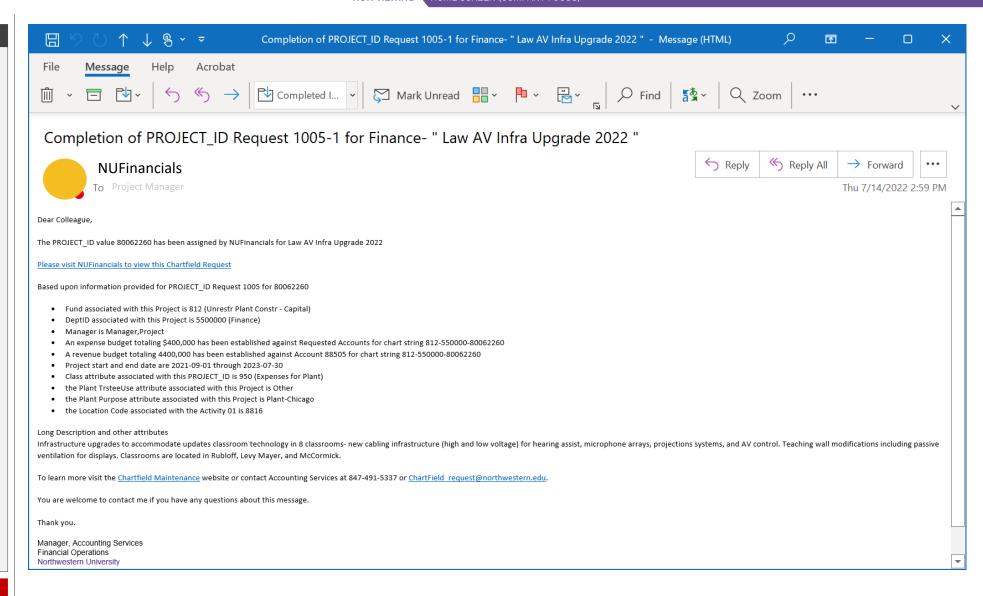




HOME SCREEN (COMPANY FOCUS)

#### **▼** PROCESS

26) Finally, send the Project Manger an email with the Project ID number and instructions on what information they need to enter.





HOME SCREEN (COMPANY FOCUS)

#### **▼** PROCESS

The saved project is accessible to the PM directly from the Facilities Connect Home Screen via:

- The 'My Projects' Phase portlets (located at the center of the screen), or
- The My Capital Projects menu (located on the left side of screen)

