Northwestern | FACILITIES CONNECT

PROJECT MANAGEMENT



Job Guide #1

PM Module Basic Navigation / Project Walkthrough



PM MODULE BASIC NAVIGATION / PROJECT WALKTHROUGH

DOCUMENT SUMMARY

This job guide provides an overview for basic navigation of the Facilities Connect Project Management module (PM Module), as well as project information accessible to all PM Module user groups.

The purpose of this document is to serve as guided reference and/or new hire training for navigating the Facilities Connect PM Module and viewing individual project information.

Note: The Facilities Connect screen shots in this guide were taken as the Project Manager role. Exact screen views and options may differ slightly depending on your individual user role.

VERSION INFORMATION (THIS DOCUMENT)

Version 1.0 Release Date 3/14/2019

Owner **NU Facilities**

Version This is the original version of the document; content within represents delivered system functionality at PM Module go-live (11/27/2018), and

has been verified as up-to-date of this document's release (3/14/19)

REVISION HISTORY

Most Recent →

| Version | Release Date | Action | Owner |
|---------|--------------|---------|---------------|
| 1.0 | 3/14/2019 | Created | NU Facilities |
| | | | |
| | | | |
| | | | |
| | | | |

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Part 1

Basic Navigation

This section will highlight the primary screens of the Facilities Connect PM Module, and the information, options, and functionality accessible on each screen

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NOW VIEWING

HOME SCREEN (COMPANY FOCUS)

▼ GENERAL NAVIGATION

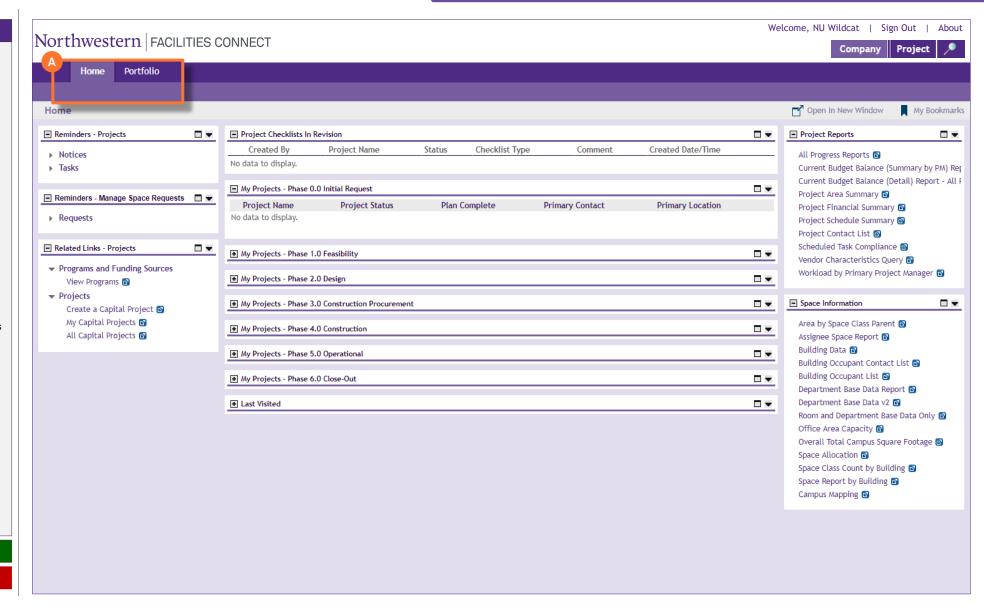
To begin, access Facilities Connect and arrive on the Facilities Connect Home Screen

- A. The **Portal Tabs** provide general navigation across Facilities Connect; the selected tab will be highlighted in light purple
 - **Home Tab (selected)** Provides general access in which the user may:
 - Create a New Project

<u>Note</u>: This option is not available for the Support Team Member user role

- Access and modify his/her existing projects
- Access and view all existing NU projects
- View the 'My Projects' queue and directly access his/her existing projects by current phase
- Access pre-configured Project Reports
- Portfolio Tab Provides additional access in which the user may:
 - View external companies (e.g. vendors)
 - Add and manage external contacts (e.g. vendor contacts)

- ► PROJECT INFORMATION
- **▶** IMPORTANT



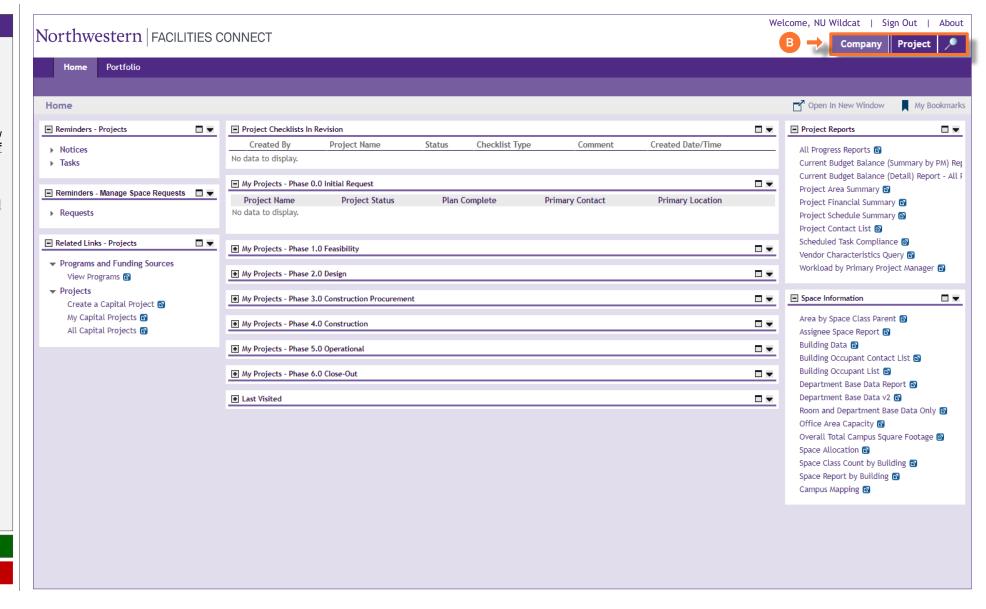
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NOW VIEWING

HOME SCREEN (COMPANY FOCUS)

▼ GENERAL NAVIGATION

- B. The Focus Bar allows the user to toggle the screen view / available options, and provides a quick link for project search functionality (the selected focus will be highlighted in light purple)
 - Company Focus (selected) Provides a view and functionality <u>across a user's portfolio of</u> <u>projects</u>
 - Project Focus Provides a view and functionality for managing within a selected project
 - Magnifying Glass (Search) Allows the user to search and select a project for <u>Project</u> <u>Focus</u>



► PROJECT INFORMATION

NOW VIEWING HOME SCREEN (COMPANY FOCUS)

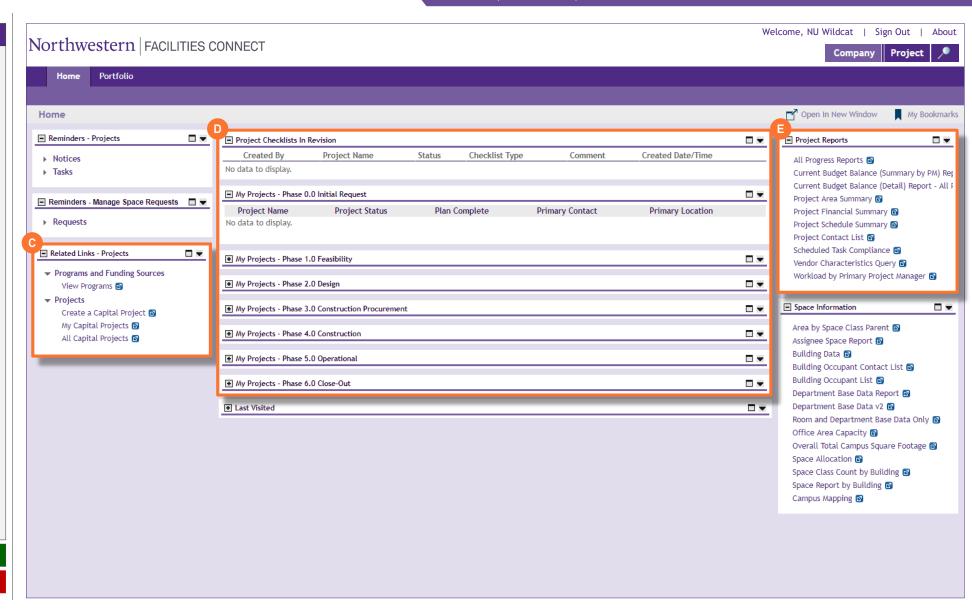
GENERAL NAVIGATION

- C. The Related Links Projects portlet contains links to the following:
 - Create a Capital Project -Launches the form to initiate a new project

<u>Note</u>: This option is not available for the Support Team Member user role

- My Capital Projects Provides a clickable list of all projects associated with the current user
- All Capital Projects Provides a clickable list of all NU Facilities projects (read only access for those projects which the user is not associated)
- D. The 'My Projects' portlets provide clickable access to the user's associated projects, grouped by the current project phase (each portlet can be either expanded or collapsed)
- E. The Project Reports portlet provides a collection of pre-configured, sortable and filterable project management module reports

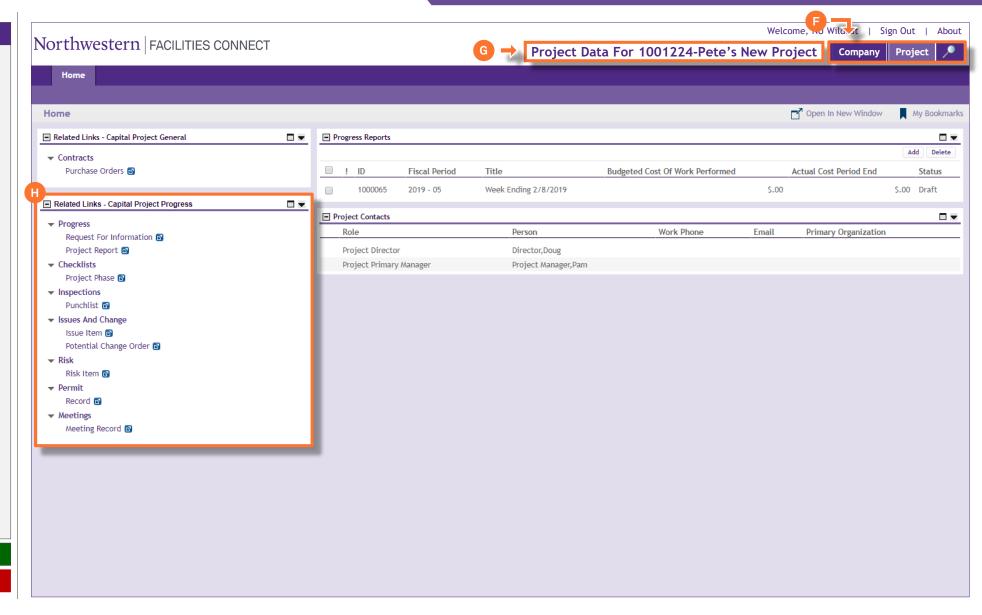
► PROJECT INFORMATION



NOW VIEWING HOME SCREEN (PROJECT FOCUS)

GENERAL NAVIGATION

- F. When a project is viewed in **Project Focus**, new options / actions will become available
- G. The Project Name will appear in the space immediately to the left of the Focus Bar, indicating that available options / actions are applicable to the selected project
- H. The Related Links Capital Project Progress portlet provides several clickable options for managing the selected project, including:
 - Request For Information Add and attach an RFI to the project
 - **Project Report** Create an interim (e.g. weekly) project report
 - **Project Phase Checklist** Apply or update a project phase checklist
 - Punchlist Add a punch list to the project
 - Issue Item Document an issue associated with the project
 - Potential Change Order Develop a potential change order for the project
 - Risk Item Document a risk associated with the project
 - Permit Record Add a permit to the project
 - Meeting Record Document a project meeting (e.g. weekly status report) and upload supporting documents
- ► PROJECT INFORMATION
- **▶** IMPORTANT

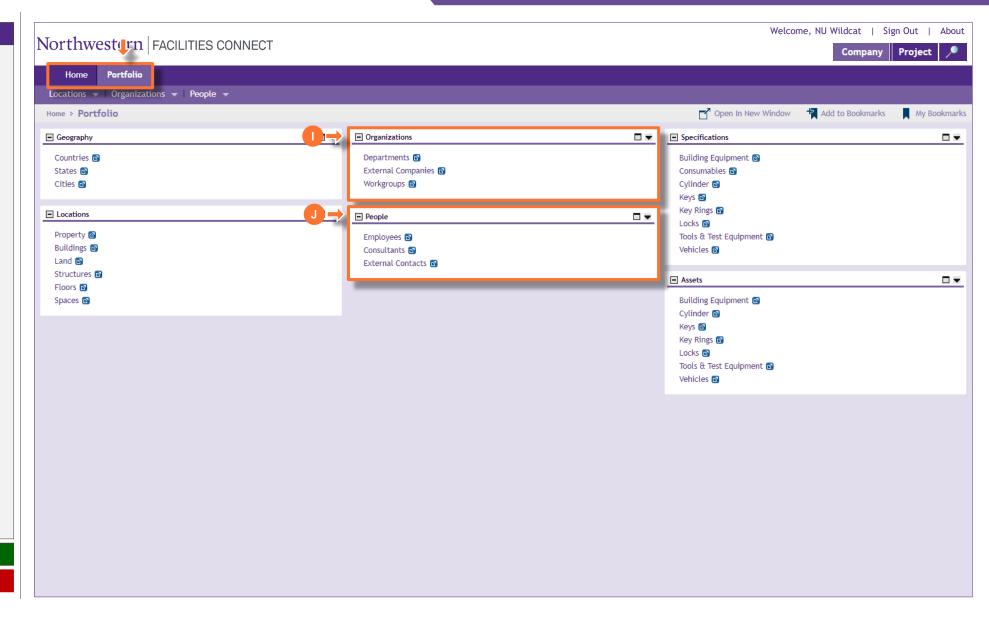


NOW VIEWING PORTFOLIO SCREEN

▼ GENERAL NAVIGATION

The Portfolio Portal Tab provides new options including the ability to search External Companies and update External Contacts

- The Organizations portlet contains a clickable link to search and view External Companies (e.g. vendors)
- J. The People portlet contains a clickable link to view and update External Contacts (e.g. vendor contacts)
 - Once an External Contact has been added and associated with an External Company, he/she can be added to a project (via the project's Contacts tab), and classified in a specific role (e.g. General Contractor)



► PROJECT INFORMATION



Part 2

Project Walkthrough

This section will walkthrough the information available within a selected project, including how information is organized and where it is located

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NOW VIEWING CAPITAL PROJECT FORM > GENERAL TAB

▼ PROJECT INFORMATION

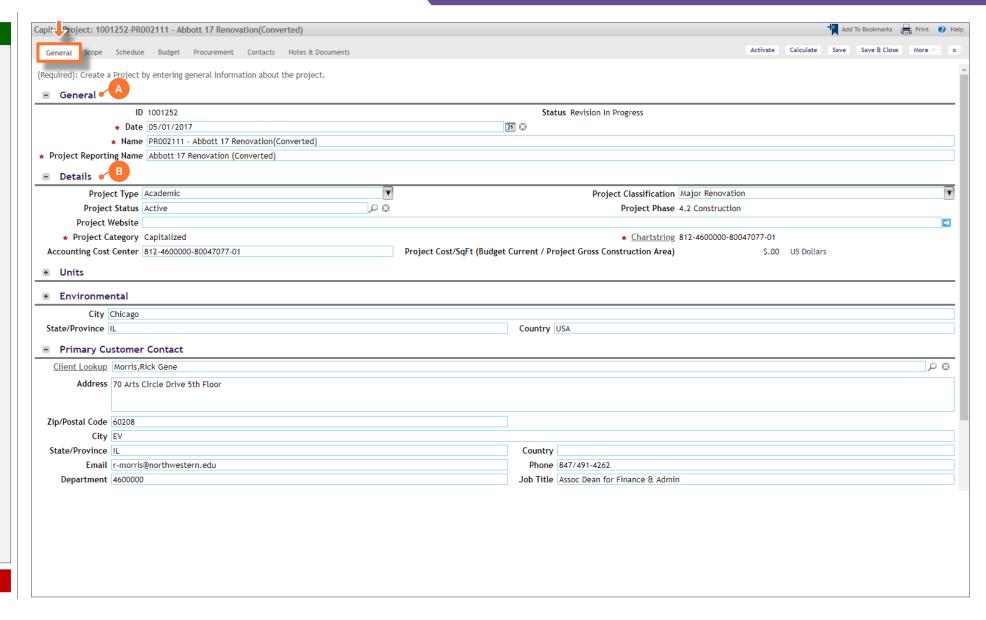
Within a project, the **General** tab organizes basic project information and details in the following sections:

A. General

- Date is the project creation date
- Name contains the project name
- Project Reporting Name defaults to project name in the Name field, but can be changed to an alternate project name (e.g. a sponsor / donor naming rights)

B. Details

- Project Type identifies the university function served by the project (e.g. academic, athletic, administrative)
- Project Classification identifies the work classification of the project (e.g. renovation, new construction, systems replacement)
- Project Status indicates the current status of the project (e.g. active, future, on-hold)
- Project Phase displays the current phase of the project (e.g. design, construction, closeout)
- Project Category identifies if the project is Capitalized (i.e. has a capital project chartsting) or Non-Capitalized (i.e. does not have a capital project chartstring)
- Chartstring (if applicable) contains the capital chartstring for the project



NOW VIEWING CAPITAL PROJECT FORM > GENERAL TAB

▼ PROJECT INFORMATION

<<Scroll down to **Primary Customer Contact**>>

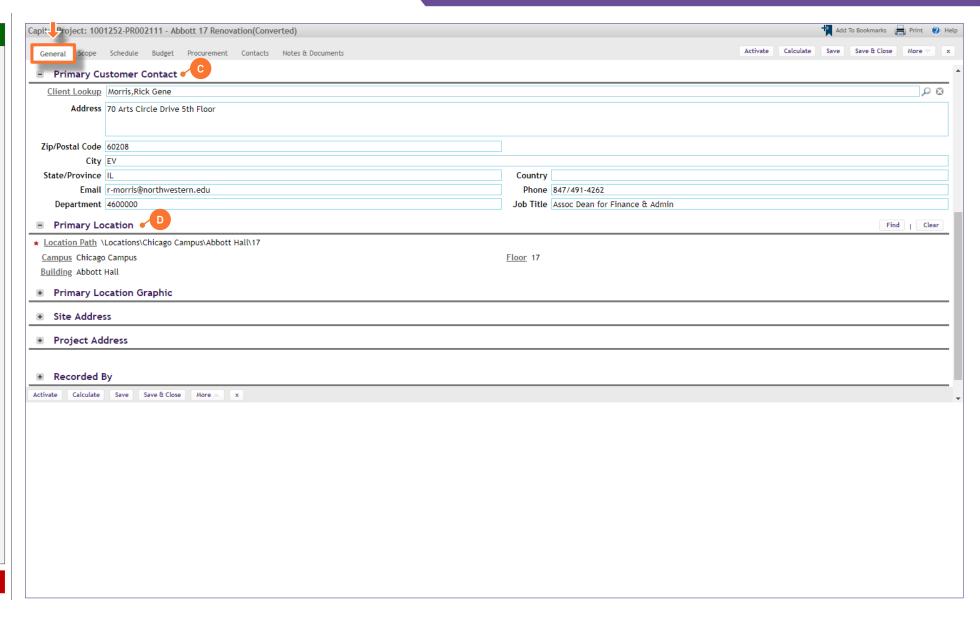
C. Primary Customer Contact

 Primary Customer Contact displays the primary NU customer contact for the project (as designated by the Project Manager) with the individual's contact information

D. Primary Location

 Primary Location displays the primary project location on campus for the project (e.g. building, floor, lot).

Note: In cases such as a new construction or campus infrastructure project, where the location is not clearly defined in Facilities Connect, a generic location such as Evanston Campus or Chicago Campus may be used in to represent the project's Primary Location



NOW VIEWING CAPITAL PROJECT FORM > SCOPE TAB

▼ PROJECT INFORMATION

The Scope tab organizes details about project scope, site information, impacted area(s), and parking buildout information (if applicable)

E. Scope

 Scope Description is a free text field for the Project Manager to summarize project scope, assumptions, and other important notations

F. Site Information

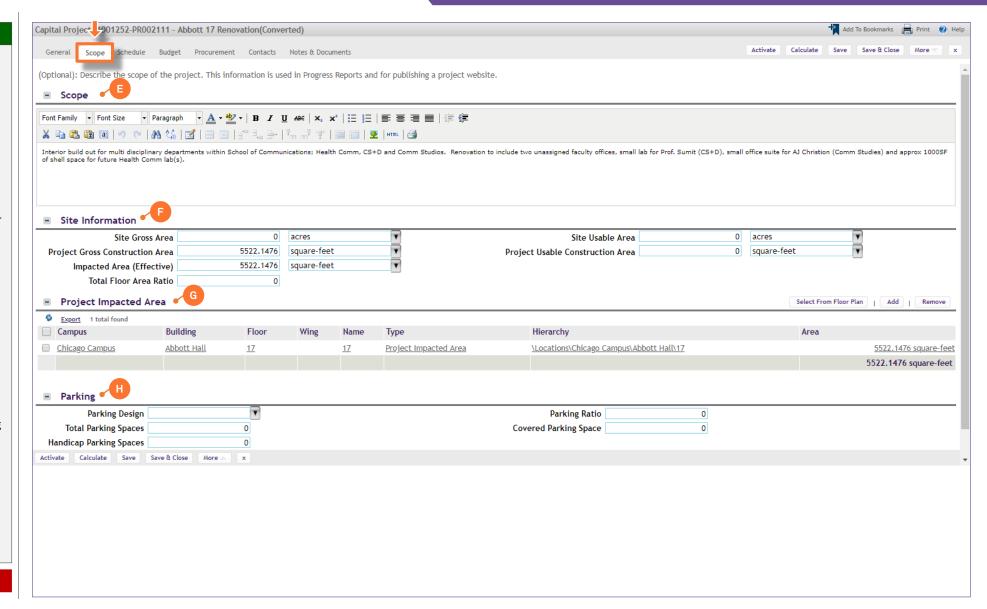
 Site Information Fields display area metrics for the project site and impacted areas; these values auto-populate in Facilities Connect based on project inputs, and can be adjusted by the Project Manager to reflect actuals

G. Project Impacted Area

 Project Impacted Area(s) List outlines the physical space(s) designated by the Project Manager as 'Impacted' by work occurring on the selected project

H. Parking

 Parking Information Fields display design information and volume metrics for the parking component of a project (if applicable)



► IMPORTANT

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NOW VIEWING

CAPITAL PROJECT FORM > SCHEDULE TAB

▼ PROJECT INFORMATION

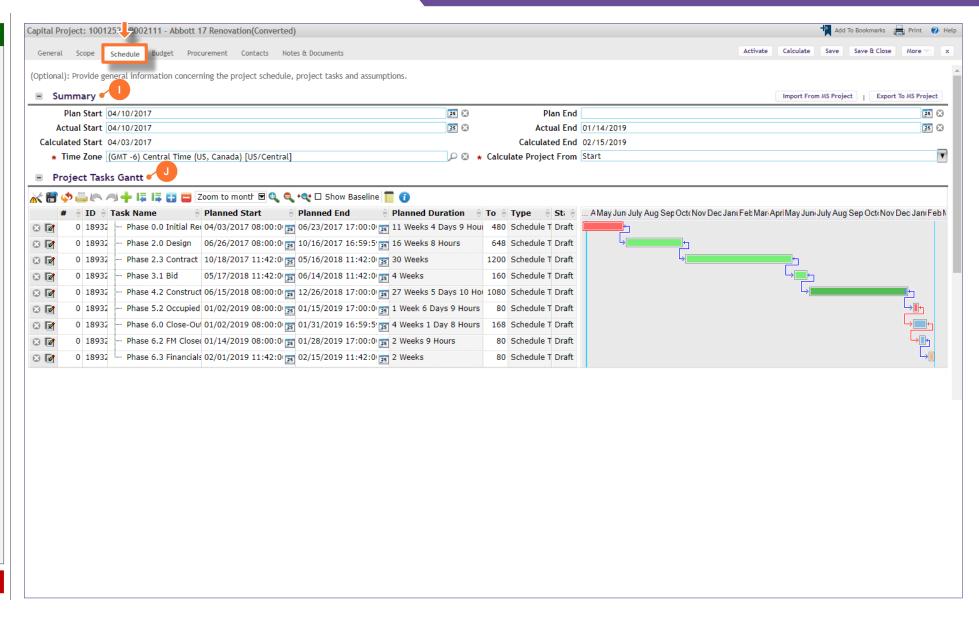
The **Schedule** tab organizes project schedule details in terms of both individual project phases and overall project duration

I. Summary

 Summary contains the project's planned and actual start/end dates, as well as calculated start/end dates based on individual project phases and dependencies outlined below

J. Project Tasks Gantt

 Project Tasks Gantt provides a visual representation of the project calendar (in the form of a Gantt chart), showing individual project phase durations and dependencies



NOW VIEWING CAPITAL PROJECT FORM > SCHEDULE TAB

▼ PROJECT INFORMATION

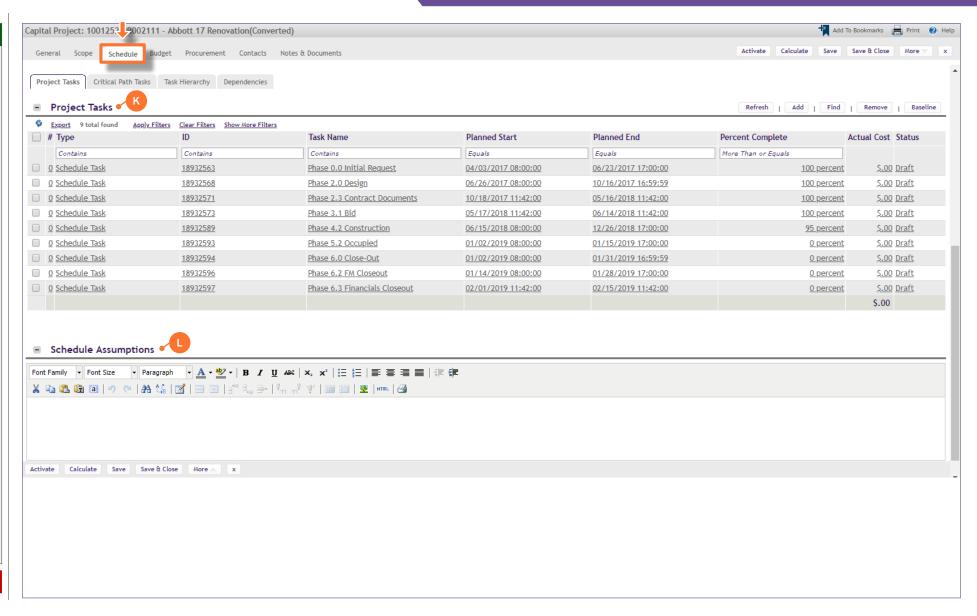
<<Scroll down to **Project Tasks**>>

K. Project Tasks

 Project Tasks provides a tabular view of project phases, highlighting phase start/end dates and percent complete information

L. Schedule Assumptions

 Schedule Assumptions is a free text field for the Project Manager to summarize any assumptions (e.g. deadlines, risks / delays, considerations, etc.) which may be either incorporated or impactful to the project schedule



NOW VIEWING CAPITAL PROJECT FORM > BUDGET TAB

PROJECT INFORMATION

On the **Budget** tab, you are able to view detailed project financial information, organized across several sections of the **Capital Project Form**

For Capitalized projects, financial information displayed in Facilities Connect is automatically received and refreshed via daily updates from NU Financials (system of record)

The **Summary** section provides a high-level project financial snapshot, including:

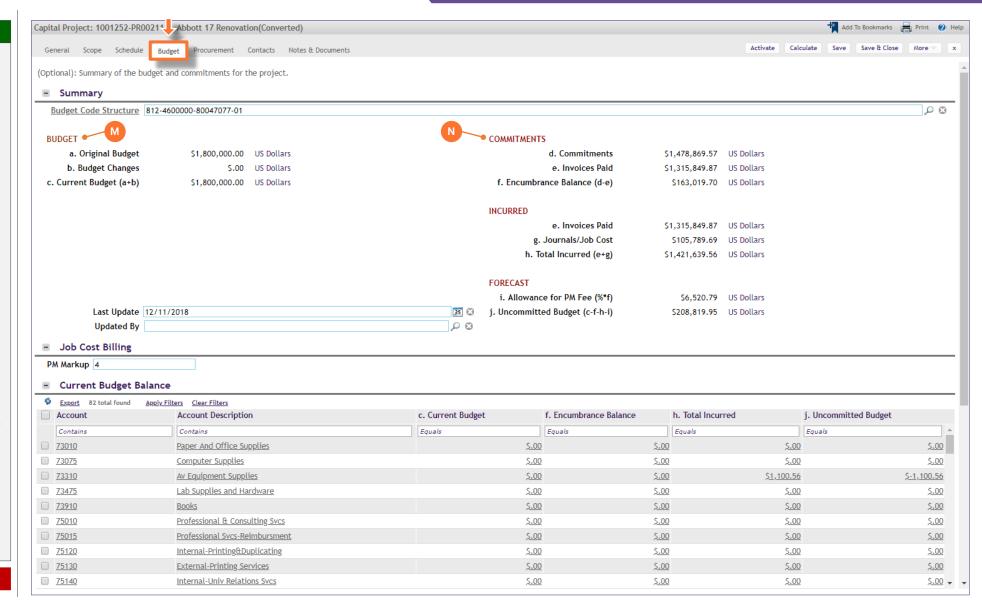
M. Budget group

- Original Budget is the original budgeted amount for the project, established during the creation of the project's capital chartstring
- Budget Changes represents the net change to project budget (i.e. sum of budget increases and decreases) following the creation of the original project budget
- Current Budget (a+b) is the project's current budget; it represents the sum of the Original Budget and Budget Changes line items

N. Commitments group

- Commitments represents the sum of all vendor purchase orders that have been created for the project
- Invoices Paid represents the sum of all vendor invoice payments that have been released for the project
- Encumbrance Balance (d-e) is the current balance of encumbrances (i.e. Commitments less Invoice Payments) for the project





NOW VIEWING CAPITAL PROJECT FORM > BUDGET TAB

PROJECT INFORMATION

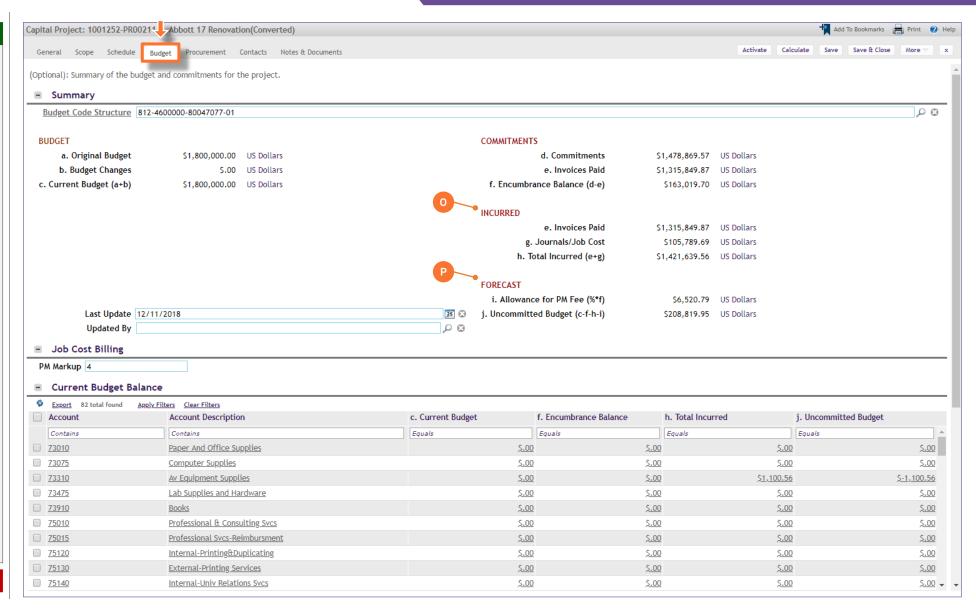
The **Summary** section provides a high-level project financial snapshot, including:

O. Incurred group

- Invoices Paid represents the sum of all vendor invoice payments that have been processed and released for the project
- Journals / Job Cost represents the sum of all NU Facilities internal costs (e.g. shop time, PM Fees, etc.) billed to the project
- Total Incurred (e+g) represents the combined total of internal and external costs that has been spent on the project

P. Forecast group

- Allowance for PM Fee (%*f) captures the project's currently unrealized, but expected project management fees, based on project Encumbrance Balance and user-entered project management fee percentage
- Uncommitted Budget (c-f-h-i) represents the portion of the project's Current Budget that is not committed as a current or expected project cost



NOW VIEWING CAPITAL PROJECT FORM > BUDGET TAB

▼ PROJECT INFORMATION

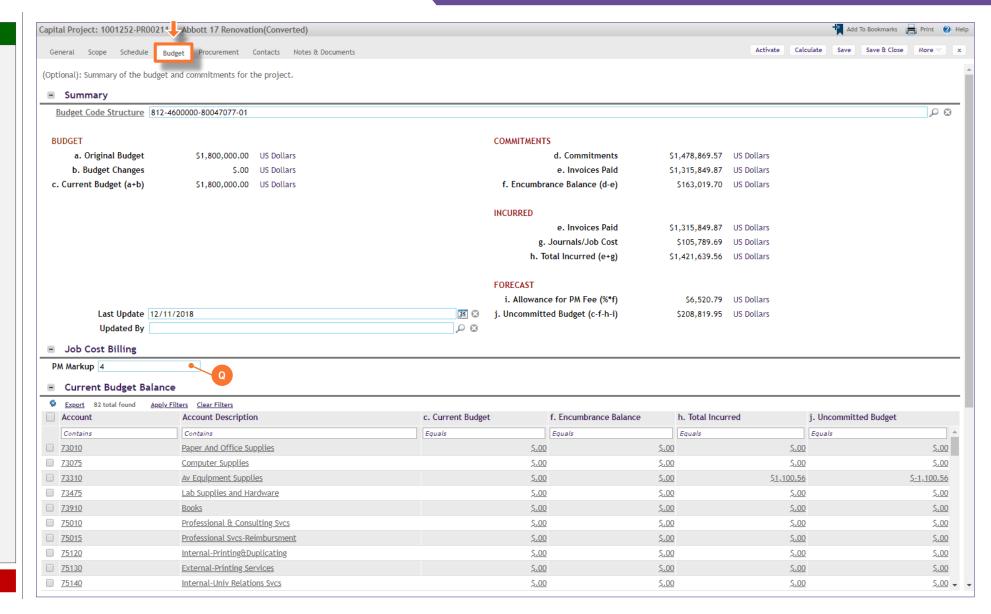
The Job Cost Billing section allows applicable users to enter the project management fee (PM Fee) for the project

Q. PM Markup is the PM Fee for the project, entered as a percentage

Note: When entering the PM Fee percentage, do not include a percent sign in your entry.

Here are some examples of how to enter the PM Fee:

- Enter "4" for a 4% PM Fee
- Enter "3.5" for a 3.5% PM Fee



NOW VIEWING CAPITAL PROJECT FORM > BUDGET TAB

▼ PROJECT INFORMATION

<<Scroll down to the **Current Budget Balance** section>>

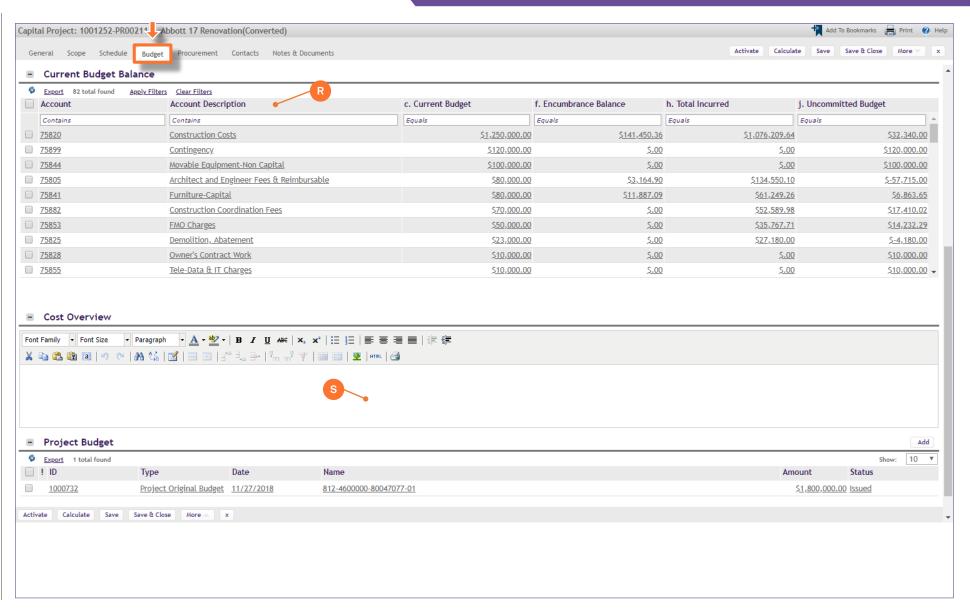
The Current Budget Balance section provides project budget and cost information at the account code level

R. Current Budget Balance is a sortable and filterable table containing budget and cost details for each project account code

<u>Note:</u> You may click on any account code line item in the table to view additional details

The Cost Overview section provides a space to capture any notes or assumptions regarding project financial information

S. Cost Overview is a free text field, allowing the Project Manager to record any notes or assumptions regarding project financial information





NOW VIEWING CAPITAL PROJECT FORM > BUDGET TAB

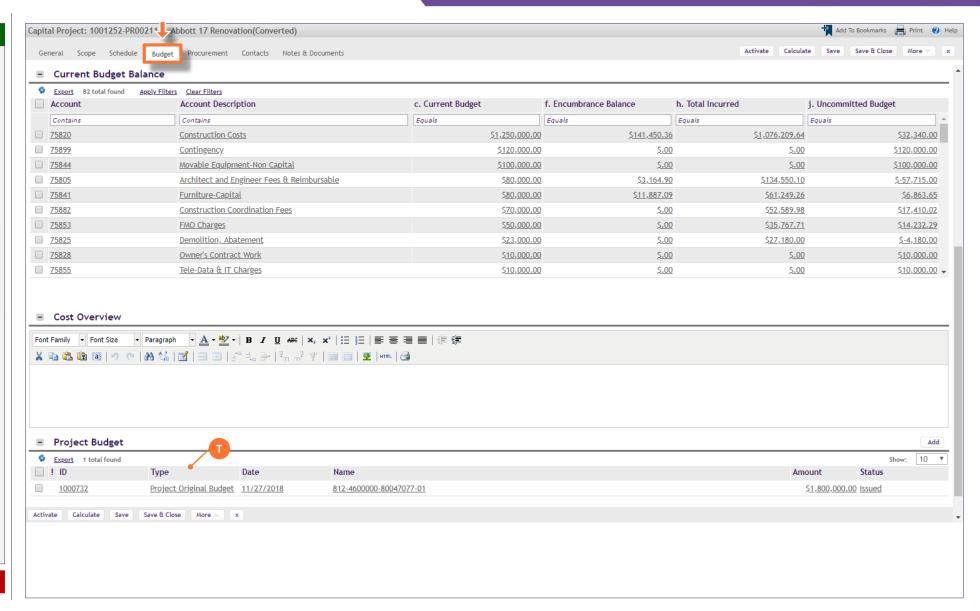
▼ PROJECT INFORMATION

The **Project Budget** section provides a record of project budget updates; this includes the creation of the original project budget as well as budget changes

T. Project Budget is a log of project budget updates, including the date of each update

<u>Note</u>: You may click on any line item in this section to view additional details, including amounts by project account code

Important: For Capital projects, <u>do not</u> use the Add button in this section. All updates to Project Budget are automatically received and refreshed via daily updates from NU Financials



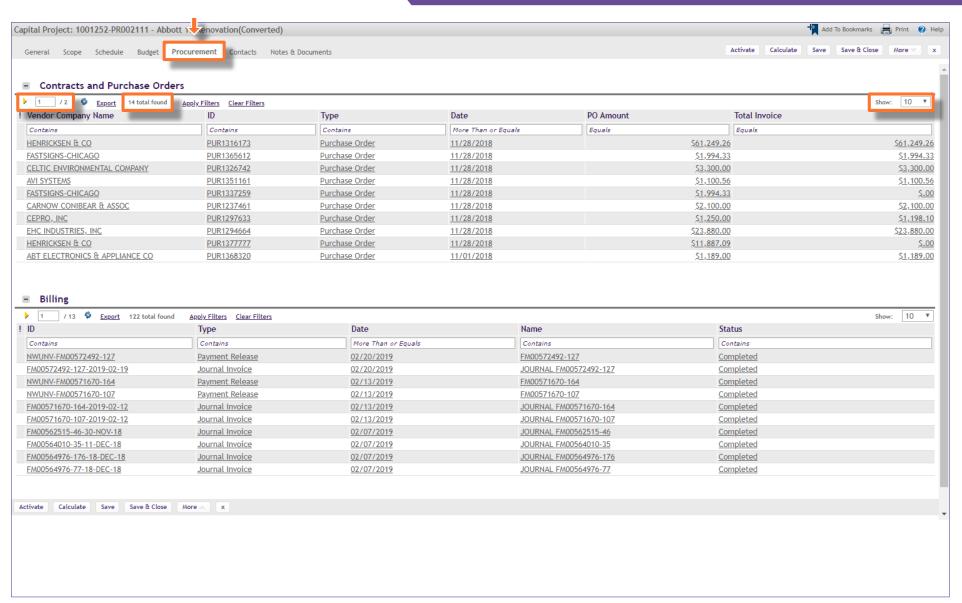
NOW VIEWING CAPITAL PROJECT FORM > PROCUREMENT TAB

▼ PROJECT INFORMATION

On the **Procurement** tab, you are able to view project purchase order, invoice, and payment release information, organized in two (2) sections of the **Capital Project Form**

Note: On this tab, always be aware of the number of items present within each section (shown on the Information Bar)

As a default, Facilities Connect will display the first ten (10) items in each section. This can be adjusted by changing the number of visible records via the **Show** dropdown on the right side of each section



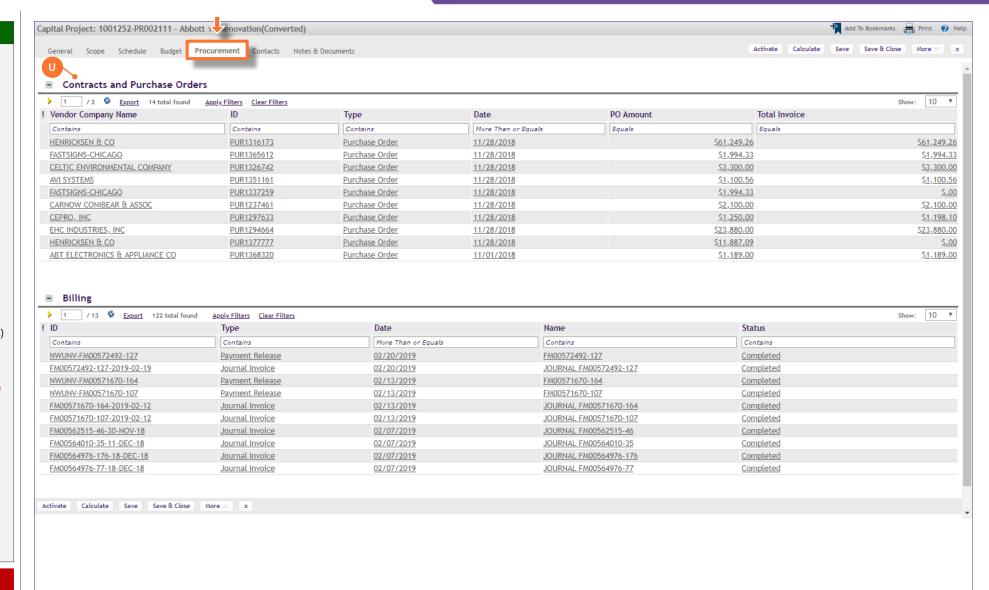
NOW VIEWING CAPITAL PROJECT FORM > PROCUREMENT TAB

PROJECT INFORMATION

The Contract and Purchase Orders section provides a list of project purchase orders, organized by vendor name and purchase order ID number

- U. Contracts and Purchase Orders is a sortable and filterable table containing budget and cost details for each project account code
 - Vendor Company Name name of the vendor as indicated on the new purchase order form
 - ID purchase order ID number
 - Type indicates the record type of the individual line item
 - Date date of purchase order creation (or last update to PO amount)
 - PO Amount total amount of the purchase order (includes initial amount and any changes)
 - Total Invoice total of NU invoice payments applied to the purchase order

Note: You may click on any purchase order line item in the table to view additional details



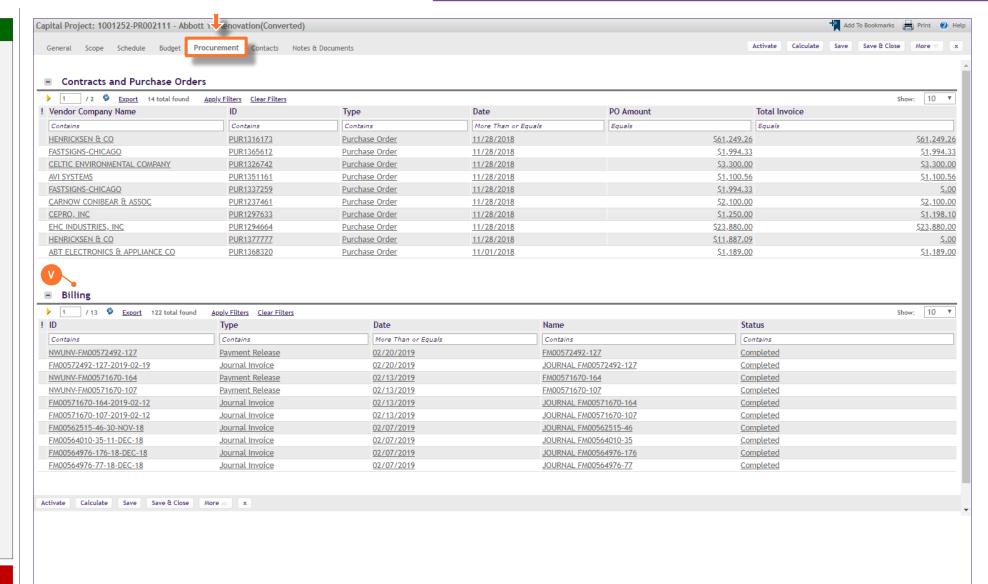
NOW VIEWING CAPITAL PROJECT FORM > PROCUREMENT TAB

PROJECT INFORMATION

The **Billing** section provides a list of project invoices and payment release information

- V. Billing is a sortable and filterable table containing invoice (PO and journal) and payment information
 - ID ID number for the invoice or payment release
 - Type indicates the record type of the individual line item
 - PO Invoice represents an invoice of charges corresponding to a vendor PO
 - Journal Invoice represents an invoice of charges which is internal in nature (e.g. NU Facilities shop time, PM Fees, etc.)
 - Payment Release a record indicating that a payment has been released for a corresponding PO or Journal invoice
 - Date date of the invoice or payment release
 - Name the system-created name for the invoice or payment release record
 - Status indicates the status of the invoice or payment release

<u>Note</u>: You may click on any invoice or payment release line item in the table to view additional details



NOW VIEWING CAPITAL PROJECT FORM > CONTACTS TAB

▼ PROJECT INFORMATION

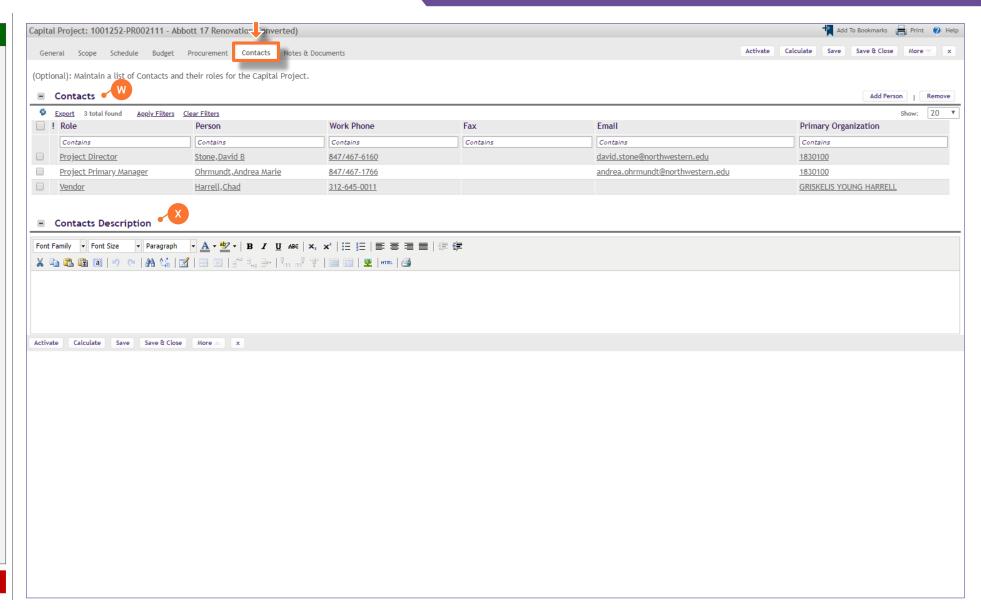
The **Contacts** tab organizes internal and external project contacts, including project roles and contact information

W. Contacts

 Contacts is a listing of internal and external project contacts, maintained by the Project Manager, and includes each individual's project role and contact information

X. Contacts Description

 Contacts Description is a free text field for the Project Manager to summarize any important information or notations regarding project contacts



Add To Bookmarks 📙 Print 🕡 Help

Add

Find |

Show:

Show:

Remove

20 ▼

Upload

20 ▼

Remove

10 ▼

Save Save & Close More

Activate

Calculate

NOW VIEWING CAPITAL PROJECT FORM > NOTES & DOCUMENTS TAB

▼ PROJECT INFORMATION

The Notes & Documents tab is a centralized repository for important project notes and documentation

Y. Comments

 Comments is a rolling list of date-stamped notations, editable by <u>all user roles</u> able to access the project. Use of the field is at the user's discretion, but it can be used for memorialization of important project events such as milestones, key decisions, project risks, etc.

Z. Related Documents

 Related Documents is a file repository for the storage of important project documentation and / or media files (e.g. contracts, drawings, designs, photos). This section includes an upload utility (via the 'Upload' button) for searching and selecting files for upload.

! Comment Type Created By Reference Date Comment No data to display Related Documents O total found ! Document Name **Document Description** No data to display Progress Reports 0 total found □ ! ID Date Title Status No data to display Activate Calculate Save Save & Close More x

▶ IMPORTANT

Capital Project: 1001252-PR002111 - Abbott 17 Renovation(Converted)

(Optional): Reference related documents or review comments to the record.

■ Comments

O total found

General Scope Schedule Budget Procurement Contacts Notes & Documents