



Complete a New Project Record



COMPLETE A NEW PROJECT RECORD

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for completing a new project record in Facilities Connect. The Project Manger will take over this process from the Financial administrator who creates the new project record.

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 Notes **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

	Version	Release Date	Action	Owner
Most Recent →	1.2	0715/2022	Updated	NU Facilities
	1.1	03/04/2022	Updated	NU Facilities
	1.0	02/13/2019	Created	NU Facilities
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GETTING STARTED

- ❖ Creating a new Capital Project is a joint effort with the Facilities Finance group.
- ❖ The process starts once you receive an email confirmation from NUFinancials that the project has been created with a Chartstring.
- ❖ This will trigger Facilities Finance to create the project and apply the necessary Template.

▶ PROCESS

▶ IMPORTANT

Completion of PROJECT_ID Request 1005-1 for Finance- " Law AV Infra Upgrade 2022 " - Message (HTML)

File Message Help Acrobat

Completed I... Mark Unread Find Zoom

Completion of PROJECT_ID Request 1005-1 for Finance- " Law AV Infra Upgrade 2022 "

 **NUFinancials**
To Project Manager

Reply Reply All Forward Thu 7/14/2022 2:59 PM

Dear Colleague,

The PROJECT_ID value 80062260 has been assigned by NUFinancials for Law AV Infra Upgrade 2022

[Please visit NUFinancials to view this Chartfield Request](#)

Based upon information provided for PROJECT_ID Request 1005 for 80062260

- Fund associated with this Project is 812 (Unrestr Plant Constr - Capital)
- DeptID associated with this Project is 5500000 (Finance)
- Manager is Manager,Project
- An expense budget totaling \$400,000 has been established against Requested Accounts for chart string 812-550000-80062260
- A revenue budget totaling 4400,000 has been established against Account 88505 for chart string 812-550000-80062260
- Project start and end date are 2021-09-01 through 2023-07-30
- Class attribute associated with this PROJECT_ID is 950 (Expenses for Plant)
- the Plant TrsteeUse attribute associated with this Project is Other
- the Plant Purpose attribute associated with this Project is Plant-Chicago
- the Location Code associated with the Activity 01 is 8816

Long Description and other attributes
Infrastructure upgrades to accommodate updates classroom technology in 8 classrooms- new cabling infrastructure (high and low voltage) for hearing assist, microphone arrays, projections systems, and AV control. Teaching wall modifications including passive ventilation for displays. Classrooms are located in Rubloff, Levy Mayer, and McCormick.

To learn more visit the [Chartfield Maintenance](#) website or contact Accounting Services at 847-491-5337 or ChartField_request@northwestern.edu.

You are welcome to contact me if you have any questions about this message.

Thank you.

Manager, Accounting Services
Financial Operations
Northwestern University



PROCESS

- 1) Once a Capital Project has been created in **Facilities Connect**,
 - Finance will send you a confirmation email with the new **Project ID number**.

- 2) Project managers are responsible for completing the following information in Facilities Connect,
 - Project Type and Project Classification
 - Contacts other than the Primary PM
 - Completing the Project Description on the Scope tab
 - Identifying the impacted area
 - Adding Schedule dates (start, end, etc.)
 - Subsequent info such as checklists, status reports, etc.

IMPORTANT

- All projects must comply with **approved Naming Conventions**; please refer to the **Project Naming Conventions** guide on the Facilities Connect website for more details

FW: Completion of PROJECT_ID Request 1005-1 for Finance- " Law AV Infra Upgrade 2022 " - Message (HTML)

File Message Help Acrobat

Reply Reply All Forward Completed I... Mark Unread Find Zoom

FW: Completion of PROJECT_ID Request 1005-1 for Finance- " Law AV Infra Upgrade 2022 "

Facilities Finance
To Project Manager

Capital Project - WT and PO request procedure 07-01-20.docx
22 KB

Hi Project Manager,

Facilities Connect (FC) **ID 1001814** has been created for the below Capital project.

- 1) Please review and update project information in FC as necessary.
- 2) Project Managers are responsible for adding the following information in FC:
 - Project Type and Project Classification
 - Contacts other than the Primary PM
 - Completing the Project Description on the Scope tab
 - Identifying the impacted area
 - Adding Schedule dates (start, end, etc.)
 - Subsequent info such as checklists, status reports, etc.
- 3) Attached are instructions on how to request WTs and POs for a Capital Project.

Please let me know if you have any questions.

Manager, Financial Administration
Facilities | Finance & Administration
Northwestern University

Thu 7/14/2022 3:33 PM



PROCESS

To complete the Project Record, log into Facilities Connect,

3) Click the Project Name link in the Phase 0.0 section

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

IMPORTANT

Do not click the Project View option, as you need to make edits to the Project Record.

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Home

Reminders - Projects

Project Checklists In Revision

Project Reports

My Projects - Phase 0.0 Initial Request

Project Name	Project Status	Plan Complete	
Law AV Infra Upgrade 2022			

My Projects - Phase 1.0 Feasibility

Project Name	Project Status	Plan Complete	Project Manager	Primary Location
Tech Lab HVAC C...	On Hold		Wright,Teri	

My Responsible Spaces

Northwestern Spaces

- Area by Space Class Parent
- Assignee Space Report
- Building Data
- Building Occupant Contact List
- Building Occupant Location Contac
- Building Occupant List
- Department Base Data Report



PROCESS

From the **Project Record** screen,

- 4) Click the **Project Type** drop down arrow
- 5) Select the **Type**

IMPORTANT

Capital Project: 1001814-Law AV Infra Upgrade 2022

General Scope Schedule Budget Procurement Cash Flow Contacts Closeout Security Notifications Notes & Documents Calendar Details Calendar

Activate Calculate Save Save & Close More

(Required): Create a Project by entering general information about the project.

General

ID 1001814 Status Draft

Date 07/08/2022

Name Law AV Infra Upgrade 2022

Project Reporting Name Law AV Infra Upgrade 2022

Details

Project Type [dropdown] Project Classification [dropdown]

Project Phase 0.0 Initial Request

Project Category Academic

Chartstring 812-5500000-80062260-01

Units Administrative

Environment Housing

City Chicago

State/Province IL Country USA

Primary Customer Contact

Client Lookup [input]

Address [input]

Zip/Postal Code [input]

City [input]



PROCESS

- 6) Click the **Project Classification** drop down arrow
- 7) Select the **Classification**

Capital Project: 1001814-Law AV Infra Upgrade 2022

General Scope Schedule Budget Procurement Cash Flow Contacts Closeout Security Notifications Notes & Documents Calendar Details Calendar

Activate Calculate Save Save & Close More x

(Required): Create a Project by entering general information about the project.

General

ID 1001814 Status Draft

* Date 07/08/2022

* Name Law AV Infra Upgrade 2022

* Project Reporting Name Law AV Infra Upgrade 2022

Details

Project Type Academic

Project Status Active

Project Website Abbott Hall Second Floor MFA Teaching Studio Buildout 2018

* Project Category Capitalized

Accounting Cost Center 812-5500000-80062260-01 Project Cost/SqFt (Budget Current / Project Gross

Units

Environmental

City Chicago

State/Province IL Country USA

Primary Customer Contact

Client Lookup

Address

Zip/Postal Code

City

Project Classification dropdown menu:

- New Construction
- Major Renovation
- Minor Renovation
- Systems Replacement

IMPORTANT



PROCESS

8) Once the Type and Classification have been entered, add any additional **Contacts**.

- Click the **Contact** tab

<<Upon clicking, the Contacts tab will open in the same screen>>

IMPORTANT

Capital Project: 1001814-Law AV Infra Upgrade 2022

8 **Contacts**

General Scope Schedule Budget Procurement Cash Flow **Contacts** Outlook Security Notifications Notes & Documents Calendar Details Calendar

Activate Calculate Save Save & Close More x

(Required): Create a Project by entering general information about the project.

General

ID 1001814 Status Draft

* Date 07/08/2022

* Name Law AV Infra Upgrade 2022

* Project Reporting Name Law AV Infra Upgrade 2022

Details

Project Type Academic Project Classification Systems Replacement

Project Status Active Project Phase 0.0 Initial Request

Project Website

* Project Category Capitalized * Chartstring 812-5500000-80062260-01

Accounting Cost Center 812-5500000-80062260-01 Project Cost/SqFt (Budget Current / Project Gross Construction Area) \$.00 US Dollars

Units

Environmental

City Chicago

State/Province IL Country USA

Primary Customer Contact

Client Lookup

Address

Zip/Postal Code

City



PROCESS

9) Click the **Add Person** button

<<Upon clicking, the **Contact Search** pop-up will open>>

10) Use the drop-down menu to select the **External Contacts**

11) Use the available **Column Headers / Search Fields** to sort and filter the list of contacts to locate the desired contact

12) Once you have located the desired contact, click on the corresponding **check boxes**

13) 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.

Capital Project: 1001814-Law AV Infra Upgrade 2022

General Scope Schedule Budget Procurement Cash Flow **Contacts** Closeout Security Notifications Notes & Documents

(Optional): Maintain a list of Contacts and their roles for the Capital Project.

Contacts **Add Person** Remove

Apply Filters Clear Filters

Role Contains

Manager

Project Director

Project Primary Manager

Items per page: 10 1 - 3

Contacts Description

Font Family Font Size Paragraph

External Contact

OK Cancel

	Name	Title	Primary Organization	Work Phone
<input type="checkbox"/>	Abney, Kim	Project Executive	\Organizations\Vendors\MECCOR INDUSTRIES	847-676
<input type="checkbox"/>	Armbrust, Alan	Architect	\Organizations\Vendors\STR PARTNERS LLC	312-464
<input type="checkbox"/>	Baade, Tom	Construction Mana...	\Organizations\Vendors\M A MORTENSON COMPANY	847-472
<input type="checkbox"/>	Bedore, Chris	Project Engineer	\Organizations\Vendors\KELSO-BURNETT CO	224-201
<input type="checkbox"/>	Behles, Joe	Principial	\Organizations\Vendors\BEHLES & BEHLES	847-624
<input type="checkbox"/>	Behounek, Jan	Architect	\Organizations\Vendors\HOLABIRD & ROOT LLC	312-357
<input type="checkbox"/>	Blair, Donald	Architect		212-941

Items per page: 50 1 - 50 of 109 items 1 of 3 pages



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.

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Contacts Description

Font Family Font Size Paragraph

For some roles, you can assign only one contact.

* Role	* Name	Organization	Work phone	Fax	Email
Project Director	Type to search Required				
Project Primary Manager	Type to search Required				

New row +



PROCESS

14) Once all the necessary Contacts have been added, update the information on the Scope tab

- Click the **Scope** tab

<<Upon clicking, the Scope tab will open in the same screen>>

IMPORTANT

Capital Project: 1001814-Law AV Infra Upgrade 2022

General **Scope** 14 Budget Procurement Cash Flow **Contacts** Closeout Security Notifications Notes & Documents

(Optional): Maintain a list of Contacts and their roles for the Capital Project.

Contacts Add Person Remove

Apply Filters Clear Filters

<input type="checkbox"/>	!	Role	Person	Work Phone	Fax	Email	Primary On
		Contains	Contains	Contains	Contains	Contains	Contain
<input type="checkbox"/>		Manager	Humphrey,Bonnie Lee	847/467-7864		b-humphrey@northwestern.edu	Facilitie
<input type="checkbox"/>		Project Director	Stone,David B	847/467-6160		david.stone@northwestern.edu	Facilitie
<input type="checkbox"/>		Project Primary Manager	Beall,Michelle Lagdan	847/467-4505		m-beall@northwestern.edu	Facilitie

Items per page: 10 1 - 3 of 3 items 1 of 1 pages

Contacts Description

Font Family Font Size Paragraph



PROCESS

15) Enter the **Project Description** in the **text box** of the **Scope** section

IMPORTANT

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

Capital Project: 1001814-Law AV Infra Upgrade 2022

General Scope Schedule Budget Procurement Cash Flow Contacts Closeout Security Notifications Notes & Documents

15 (Optional): Describe the scope of the project. This information is used in Progress Reports and for publishing a project website.

Scope

Font Family Font Size Paragraph **A** **B** *I* U ABC X₁ X₂ [List Icons]

Infrastructure upgrades to accommodate updates classroom technology in 8 classrooms- new cabling infrastructure (high and low voltage) for hearing assist, microphone arrays, projections systems, and AV control. Teaching wall modifications including passive ventilation for displays. Classrooms are located in Rubloff, Levy Mayer, and McCormick.

Site Gross Area 0 acres Site Usable Area 0 acres
 Project Gross Construction Area 0 square-feet Project Usable Construction Area 0 square-feet
 Impacted Area (Effective) 0 square-feet
 Total Floor Area Ratio 0

Project Impacted Area Select From Floor Plan | Add | Remove

Apply Filters Clear Filters

Campus	Building	Floor	Wing	Name	Type	Hierarchy	Area
No data to display							



PROCESS

16) Scroll down to the **Project Impacted Area** section

- Click the **Add** button

<<Upon clicking, the **All Locations** search pop-up will open>>

17) Use the available **Column Headers / Search Fields** to sort and filter the list of locations to find the desired Building, Floor(s), or Space(s)

18) Once you have found the desired locations, click on the corresponding **check boxes**

19) Click **OK** to select

<<Repeat for **all** impacted spaces or floors>>

IMPORTANT

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

Capital Project: 1001814-Law AV Infra Upgrade 2022

General Scope Schedule Budget Procurement Cash Flow Contacts Closeout Security Notifications Notes & Documents

Activate Calculate Save Save & Close More

Site Information

Site Gross Area 0 acres
 Project Gross Construction Area 0 square-feet
 Impacted Area (Effective) 0 square-feet
 Total Floor Area Ratio 0

Site Usable Area 0 acres
 Project Usable Construction Area 0 square-feet

Project Impacted Area Select From Floor Plan Add Remove

Apply Filters Clear Filters

OK Cancel

All Locations Apply Filters Clear Filters

<input type="checkbox"/>	Campus	Building	Floor	Wing	Name	Type
<input type="checkbox"/>	Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	Chicago Campus	Gary Law Library			Gary Law Library	Building
<input type="checkbox"/>	Chicago Campus	Gary Law Library	01		01	Floor
<input type="checkbox"/>	Chicago Campus	Gary Law Library	01		00119	Space
<input type="checkbox"/>	Chicago Campus	Gary Law Library	01		00120	Space
<input type="checkbox"/>	Chicago Campus	Gary Law Library	01		00120A	Space
<input type="checkbox"/>	Chicago Campus	Gary Law Library	01		00120B	Space
<input type="checkbox"/>	Chicago Campus	Gary Law Library	01		00121	Space

Items per page: 50 1 - 50 of 128 items 1 of 3 pages



PROCESS

20) Once you add the add the Impacted Area(s), the square-footage information is automatically calculated under the Site Information section

Capital Project: 1001814-Law AV Infra Upgrade 2022

General Scope Schedule Budget Procurement Cash Flow Contacts Closeout Security Notifications Notes & Documents

Activate Calculate Save Save & Close More x

Site Information

Site Gross Area acres

Site Usable Area acres

Project Gross Construction Area square-feet

Project Usable Construction Area square-feet

20 Impacted Area (Effective) square-feet

Project Impacted Area Select From Floor Plan | Add | Remove

[Apply Filters](#) [Clear Filters](#) [Refresh](#) [Star](#) [Download](#) [List](#)

<input type="checkbox"/>	Campus	Building	Floor	Wing	Name	Type	Hierarchy
<input type="checkbox"/>	Chicago Campus	Gary Law Library			Gary Law Library	Project Impacted Area	\Locations\Chicago Camp...

1 - 1 of 1 items

Parking

Parking Design

Parking Ratio

Total Parking Spaces

Covered Parking Space

Handicap Parking Spaces

Activate Calculate Save Save & Close More x

IMPORTANT

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



PROCESS

22) Adjust the Schedule dates as needed,

- i.e., Plan Start, Plan End or Phase dates

IMPORTANT

- For additional information about the Gantt Chart, please refer to the [Gantt Chart Functionality](#) job guide.
- For additional information about how to request Work Tasks and POs, please refer to the [Request Procedures](#) job guide attached to the Facilities Finance email.

Capital Project: 1001814-Law AV Infra Upgrade 2022

General Scope **Schedule** Budget Procurement Cash Flow Contacts Closeout Security Notifications Notes

(Optional): Provide general information concerning the project schedule, project tasks and assumptions.

Summary

Plan Start: 07/08/2022 Plan End: []
 Actual Start: [] Actual End: []
 Calculated Start: 07/08/2022 Calculated End: 10/25/2022
 Time Zone: (GMT -6) Central Time (US, Canada) [US/Central] Calculate Project From: Start

Project Tasks Gantt

Zoom to mont Show Baseline

#	ID	Task Name	Planned Start	Planned End	Planned Duration	To
0	85470	Phase 0.0 Initial Rec	07/08/2022 14:56:3	07/26/2022 14:56:3	2 Weeks 3 Days 23 Hour	80
0	85470	Phase 1.0 Feasibility	07/26/2022 14:56:3	08/09/2022 14:56:3	2 Weeks	80
0	85470	Phase 2.0 Design	08/09/2022 14:56:3	08/29/2022 14:56:3	2 Weeks 6 Days	80
0	85470	Phase 3.0 Construct	08/29/2022 14:56:3	09/13/2022 14:56:3	2 Weeks 23 Hours	80
0	85470	Phase 4.0 Construct	09/13/2022 14:56:3	09/27/2022 14:56:3	1 Week 6 Days 23 Hours	80
0	85470	Phase 5.0 Operation	09/27/2022 14:56:3	10/11/2022 14:56:3	1 Week 6 Days 23 Hours	80
0	85470	Phase 6.0 Close-Ou	10/11/2022 14:56:3	10/25/2022 14:56:3	1 Week 6 Days 23 Hours	80



PROCESS

Once you add all necessary updates to the Project Record,

23) Click the **Save** button

24) Click the **Activate** button

Capital Project: 1001814-Law AV Infra Upgrade 2022

General Scope **Schedule** Budget Procurement Cash Flow Contacts Closeout Security Notifications Notes 24 **Activate** Calculate 23 **Save** Save & Close More x

(Optional): Provide general information concerning the project schedule, project tasks and assumptions.

Summary

Plan Start: 07/08/2022 Plan End: Actual Start: Actual End: Calculated Start: 07/08/2022 Calculated End: 10/25/2022
 * Time Zone: (GMT -6) Central Time (US, Canada) [US/Central] * Calculate Project From: Start

Project Tasks Gantt

Zoom to mont Show Baseline

#	ID	Task Name	Planned Start	Planned End	Planned Duration	To
0	85470	Phase 0.0 Initial Rec	07/08/2022 14:56:3	07/26/2022 14:56:3	2 Weeks 3 Days 23 Hour	80
0	85470	Phase 1.0 Feasibility	07/26/2022 14:56:3	08/09/2022 14:56:3	2 Weeks	80
0	85470	Phase 2.0 Design	08/09/2022 14:56:3	08/29/2022 14:56:3	2 Weeks 6 Days	80
0	85470	Phase 3.0 Construct	08/29/2022 14:56:3	09/13/2022 14:56:3	2 Weeks 23 Hours	80
0	85470	Phase 4.0 Construct	09/13/2022 14:56:3	09/27/2022 14:56:3	1 Week 6 Days 23 Hours	80
0	85470	Phase 5.0 Operation	09/27/2022 14:56:3	10/11/2022 14:56:3	1 Week 6 Days 23 Hours	80
0	85470	Phase 6.0 Close-Ou	10/11/2022 14:56:3	10/25/2022 14:56:3	1 Week 6 Days 23 Hours	80

... July 2022 August 2022 September 2022

IMPORTANT



PROCESS

The saved project is now accessible 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)

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Home

Reminders - Projects

Project Checklists In Revision

My Projects - Phase 0.0 Initial Request

Project Name	Project Status	Plan Complete	P
_Law AV Infra Upgrade 2022			

My Projects - Phase 1.0 Feasibility

Project Name	Project Status	Plan Complete	Project Manager	Primary Location
Tech Lab HVAC C...	On Hold		Wright,Teri	

My Capital Projects

Project Reports

Space Information

My Responsible Spaces

Northwestern Spaces

IMPORTANT