



# Managing Project Phase Checklists



# MANAGING PROJECT PHASE CHECKLISTS

## DOCUMENT SUMMARY

This job guide provides step-by-step instruction for locating, creating, and completing project phase checklists.

The purpose of this document is to serve as guided reference and/or new hire training on project task management and workflow functionality available to applicable users in Facilities Connect.

## VERSION INFORMATION (THIS DOCUMENT)

Version **1.1** Release Date **03/04/2022**

Owner **NU Facilities**

Version Notes **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 (2/18/19)**

## REVISION HISTORY

	Version	Release Date	Action	Owner
Most Recent →	1.1	03/04/2022	Updated	NU Facilities
	1.0	02/18/2019	Created	NU Facilities
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	--	--	--	--
	--	--	--	--



## GETTING STARTED

- To begin, access the **Facilities Connect Home Screen**
- In order to create a **Project Phase Checklist**, the project (for which you are creating the report) **must**:
  - Have already been created in Facilities Connect
  - Have a **Project Template** (Large or Small) applied.

**Note:** The Project Template only needs to be applied once; if it was already applied at project creation, do not reapply at this stage

▶ PROCESS

▶ IMPORTANT

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Home

**Reminders - Projects**

**Notices**

- 0 - Action Items
- 45 - Notifications

**Tasks**

- 411 - Overdue Tasks
- 2 - Tasks Due This Week
- 1 - Tasks Over Budget

**Reminders - Manage Space R...**

**Requests**

- 6 - My Active Requests

**Related Links - Projects**

**Programs and Funding Sources**

- View Programs

**Projects**

- Create a Capital Project
- My Capital Projects
- All Capital Projects

**Project Checklists In Revision**

Created By	Project Name	Status	Checklist Type	Comment	Created Date/Time
No data to display.					

**My Projects - Phase 0.0 Initial Request**

Project Name	Project Status	Plan Complete
Abbott Hall Second Floor MFA Teaching Studio Buildout 2022		

Items per page: 50 | 1 - 1 of 1 items | 1 of 1 pages

**My Projects - Phase 1.0 Feasibility**

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

Items per page: 50 | 1 - 1 of 1 items | 1 of 1 pages

**Project Reports**

- All Progress Reports
- Current Budget Balance (Summary by I
- Current Budget Balance (Detail) Report
- Project Area Summary
- Project Financial Summary
- Project Schedule Summary
- Project Contact List
- Scheduled Task Compliance
- Vendor Characteristics Query
- Workload by Primary Project Manager I

**Space Information**

**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



## GETTING STARTED

❖ Locate your desired project, contained within the 'My Projects' Phase portlets (center of Facilities Connect Home Screen)

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- 0 - Action Items
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▼ Tasks

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**Reminders - Manage Space R...**

▼ Requests

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▼ Programs and Funding Sources

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▼ Projects

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No data to display.					

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Project Name	Project Status	Plan Complete	P
<a href="#">Abbott Hall Second Floor MFA Teaching Studio Buildout 2022</a>			

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▶ My Responsible Spaces

▼ Northwestern Spaces

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My Bookmarks



## PROCESS

- 1) Select your desired project to open in **Project Focus** by clicking on the **Project Focus Icon** immediately to the left of the project name

<<Upon clicking, the **Project Focus** for the selected project will appear>>

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**Reminders - Projects**

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    - Building Occupant List
    - Department Base Data Report



## PROCESS

- From the **Related Links – Capital Project Progress** portlet, under the **Checklists** group, click on the option for **Project Phase**

<<Upon clicking, the *Project Phase Checklist Menu* for the selected project will appear>>

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1001785-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022 Project Record Switch Project My Bookmarks

Home

Related Links - Capital Project General Progress Reports

Contracts

ID	Fiscal Period	Title	Budgeted Cost Of Work Performed	Actual Cost Period End	Status
to display.					

Project Contacts

Role	Person	Work Phone	Email	Primary Organization
Project Director	Aaronson, Alexandra Leigh			\Organizations\Northwestern
Project Manager	Wright, Teri	847/491-5271		\Organizations\Workgroups\Facilities Capital Programs
Project Primary Manager	Aalsburg, Alan Michael	312/503-3702		\Organizations\Northwestern

Related Links - Capital Project Progress

- Progress
  - Request For Information
  - Project Report
- Checklists
  - Project Phase**
- Inspections
  - Punchlist
- Issues And Change
  - Issue Item
  - Potential Change Order
- Risk
  - Risk Item
- Permit
  - Record
- Meetings
  - Meeting Record



## PROCESS

- From the **Project Phase Checklist Menu**, click on the **Add** button to create a new phase checklist

<<Upon clicking, the *Project Phase Checklist Form* will open as a new window>>

▶ IMPORTANT

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1001785-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022

Project Record [Switch Project](#)

**Project Phase**

Add to Bookmarks My Bookmarks

3 **Add** Delete

Apply Filters Clear Filters

Phase Checklists	
<input type="checkbox"/> ! ID Revision Date Name	
No data to display	

Items per page: 50 0 of 0 items 1 of 1 pages



## PROCESS

On the **General** tab of the **Project Phase Checklist Form**:

- 4) Begin by adding the **Checklist Type**; click on the **Magnifying Glass** icon (right of the field)
- 5) The **Checklist Type** menu will now appear directly below; click the option labeled **Project Phase**

Phase Checklist: Add To Bookmarks Print Help

**General** Edit Actions Create Draft x

(Required): The Phase Checklist provides a project view of open or outstanding items that are to be addressed prior to ending the current Project Phase. When all items are complete or determined to be not applicable to the current Project Phase, Issue the Checklist record.

**General**

ID  Revision 0 Status

\* Date 04/01/2022

\* Name

\* Checklist Type

Project Phase

**5**  Capital Project (Checklist Type)

Project Phase

**Associated Projects**

Name	Current Project Phase	ID
<a href="#">Abbott Hall Second Floor MFA Teaching Studio Buildout 2022</a>	0.0 Initial Request	1001785

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

**Project Checklist Items**

0 total found Show: 10

<input type="checkbox"/>	Sort	Checklist Category	Checklist Item	Complete?	Completed On	Project Manager Comments
No data to display						

**Recorded By**

Name

Create Draft

▶ IMPORTANT



## PROCESS

6) Next, select the **Project Phase**; click on the **Magnifying Glass** icon (right of the field)

7) The **Project Phase** menu will now appear directly below; select the appropriate **Project Phase** from the menu

**Note:** Select the **Project Phase** that matches the **Current Project Phase** shown on the form. As a Project Manager, you will mark completion status in the checklist for the project's current phase, not for the phase in which you are requesting advancement

**Note:** To access project subphases (i.e. large template phases) on the **Project Phase** menu, click on the expand icon (⊕) beside each major project phase

## IMPORTANT

Phase Checklist: Add To Bookmarks Print Help

**General** Audit Actions Create Draft x

(Required): The Phase Checklist provides a project view of open or outstanding items that are to be addressed prior to ending the current Project Phase. When all items are complete or determined to be not applicable to the current Project Phase, Issue the Checklist record.

**General**

ID:  Revision: 0 Status:

Date: 04/01/2022

Name:  **6** Project Phase

Checklist Type: Project Phase

Comment:

**Associated Project**

Name	Current Project Phase
Abbott Hall Second Floor MFA Teaching Studio Buildout 2022	0.0 Initial Request <b>7</b> <span style="border: 1px solid orange; padding: 2px;">Current Project Phase</span>

Items per page: 10 1 - 1 of 1 items

**Project Checklist Items**

0 total found

Sort	Checklist Category	Checklist Item	Complete?	Completed On	Project Manager Comments
No data to display					

**Recorded By**

Name: Wright, Teri

Create Draft x

⊖ NU Project Phase (Project Phase)

- 0.0 Initial Request
- 1.0 Feasibility & Pre-Design
- 2.0 Design
- 3.0 Construction Procurement
- 4.0 Construction Delivery
- 5.0 Operational
- 6.0 Close-Out
- 7.0 Closed



## PROCESS

8) Next, update the checklist **Name** field; copy and paste the contents of the **Project Phase** field into the **Name** field

**Note:** These two (2) fields should match exactly before proceeding to the next step

9) Next, create a draft of your **Project Phase Checklist**; click on the **Create Draft** button (upper right of the form)

<<Upon clicking, the *Project Phase Checklist* draft is saved, and new action buttons will appear at the upper right of the form>>

▶ IMPORTANT

Phase Checklist: Add To Bookmarks Print Help

**General** 9 **Create Draft**

(Required): The Phase Checklist provides a project view of open or outstanding items that are to be addressed prior to ending the current Project Phase. When all items are complete or determined to be not applicable to the current Project Phase, Issue the Checklist record.

**8 General**

ID:  Revision: 0 Status:

\* Name:

\* Checklist Type:

Comment:

**Associated Project**

Name	Current Project Phase	ID
<a href="#">Abbott Hall Second Floor MFA Teaching Studio Buildout 2022</a>	0.0 Initial Request	1001785

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

**Project Checklist Items**

0 total found

Sort	Checklist Category	Checklist Item	Complete?	Completed On	Project Manager Comments
No data to display					

**Recorded By**

Name:

**Create Draft** x



## PROCESS

10) Now that the checklist draft has been created, populate **Project Checklist Items** by clicking the **More** button (upper right of the form)

11) Next, click on the **Apply Template** option (will appear beneath the **More** button)

<<Upon clicking, a new search window will open for selection of **Project Checklist Items**>>

Phase Checklist: Add To Bookmarks **10** Print Help

**General** Edit Actions Create **More**

(Required): The Phase Checklist provides a project view of open or outstanding items that are to be addressed prior to ending the current Project Phase. When all items are complete or determined to be not applicable to the Phase, Issue the Checklist record. **11** **Apply Template**

**General**

ID:  Revision: 0 Status:

\* Date: 04/01/2022

\* Name: 0.0 Initial Request

\* Checklist Type: Project Phase

Comment:

**Associated Project**

Name	Current Project
<a href="#">Abbott Hall Second Floor MFA Teaching Studio Buildout 2022</a>	0.0 Initial Request

Items per page: 10 1 - 1 of 1 items

**Project Checklist Items**

0 total found

Sort Checklist Category Checklist Item

No data to display

**Recorded By**

Name:

Create Draft

Checklists Template PopUp: Print Help

**Closeout Checklist Templates** Apply Filters Clear Filters

Closeout Checklist ID	Checklist Type	Checklist Name
<input type="radio"/> 1000026	Project Phase	0.0 Initial Request
<input type="radio"/> 1000027	Project Phase	1.0 Feasibility & Pre-Design
<input type="radio"/> 1000028	Project Phase	1.1 Feasibility
<input type="radio"/> 1000029	Project Phase	1.2 Planning/Pre-Design
<input type="radio"/> 1000030	Project Phase	1.3 Estimate
<input type="radio"/> 1000031	Project Phase	2.0 Design
<input type="radio"/> 1000032	Project Phase	2.1 Schematic Design
<input type="radio"/> 1000033	Project Phase	2.2 Design Development
<input type="radio"/> 1000034	Project Phase	2.3 Contract Documents
<input type="radio"/> 1000035	Project Phase	3.0 Construction Procurement
<input type="radio"/> 1000036	Project Phase	3.1 Bid
<input type="radio"/> 1000037	Project Phase	3.2 Award
<input type="radio"/> 1000038	Project Phase	4.0 Construction Delivery
<input type="radio"/> 1000039	Project Phase	4.1 Mobilization
<input type="radio"/> 1000040	Project Phase	4.2 Construction

**IMPORTANT**



## PROCESS

12) Click the **Radio Button** for the current **Project Phase**; this will select the pre-defined list of **Project Checklist Items** aligned with that phase

13) Next, click the **Continue** button to confirm the selection

<<Upon clicking, the search window will close, and the **Project Checklist Items** will be populated in the corresponding section of the form>>

Phase Checklist: Add To Bookmarks Print Help Create Draft x

**General** Print Actions

(Required): The Phase Checklist provides a project view of open or outstanding items that are to be addressed prior to ending the current Project Phase. When all items are complete or determined to be not applicable to the current Project Phase, Issue the Checklist record.

**General**

ID:

Revision: 0 Status:

Date: 04/01/2022

Name: 0.0 Initial Request

Checklist Type: Project Phase

Comment:

**Associated Project**

Name	Current Project Phase
Abbott Hall Second Floor MFA Teaching Studio Buildout 2022	0.0 Initial Request

Items per page: 10 1 - 1 of 1 items

**Project Checklist Items**

0 total found

Sort Checklist Category Checklist ID

No data to display

**Recorded By**

Name: Wright, Teri

Create Draft x

**Project Phase** 0.0 Initial Request

**Checklists Template PopUp:** 13 Continue

**Closeout Checklist Templates**

Closeout Checklist ID	Checklist Type	Checklist Name
Contains	Contains	Contains
<input type="radio"/>	Project Phase	0.0 Initial Request
<input type="radio"/>	Project Phase	1.0 Feasibility & Pre-Design
<input type="radio"/>	Project Phase	1.1 Feasibility
<input type="radio"/>	Project Phase	1.2 Planning/Pre-Design
<input type="radio"/>	Project Phase	1.3 Estimate
<input type="radio"/>	Project Phase	2.0 Design
<input type="radio"/>	Project Phase	2.1 Schematic Design
<input type="radio"/>	Project Phase	2.2 Design Development
<input type="radio"/>	Project Phase	2.3 Contract Documents
<input type="radio"/>	Project Phase	3.0 Construction Procurement
<input type="radio"/>	Project Phase	3.1 Bid
<input type="radio"/>	Project Phase	3.2 Award
<input type="radio"/>	Project Phase	4.0 Construction Delivery
<input type="radio"/>	Project Phase	4.1 Mobilization
<input type="radio"/>	Project Phase	4.2 Construction

▶ IMPORTANT



## PROCESS

The **Project Checklist Items** are now populated as a numbered list, representing the typical sequence of activities to occur in the given **Project Phase**

**Note:** Always be aware of the number of **Project Checklist Items** belonging to the given project phase. This is indicated by the **Number of Records Found** located immediately below the section header. In order to view the full list of **Project Checklist Items**, you may need to adjust the number of records (i.e. checklist items) displayed using the **Show** dropdown box on the right side of this section

## IMPORTANT

Phase Checklist: 1001554 - 0 - 0.0 Initial Request

General

(Required): The Phase Checklist provides a project view of open or outstanding items that are to be addressed prior to ending the current Project Phase. When all items are complete or determined to be not applicable to the current Project Phase, Issue the Checklist record.

General

ID: 1001554 Revision: 0 Status: Draft

Date: 04/01/2022

Name: 0.0 Initial Request

Checklist Type: Project Phase Project Phase: 0.0 Initial Request

Comment:

Associated Project

Name	Current Project Phase	ID
Abbott Hall Second Floor MFA Teaching Studio Buildout 2022	0.0 Initial Request	1001785

Project Checklist Items

Export 1 total found

Sort	Checklist Category	Checklist Item	Complete?	Completed On	Project Manager Comments
<input type="checkbox"/>		1 Approvals			1. Initial Request activities and deliverables for this phase have been completed

Show: 10

Recorded By

Name: Wright, Teri

Save Save & Close Issue More x



## PROCESS

To complete the **Project Phase Checklist**, perform the following steps for **each** of the **Project Checklist Items**:

- 14) In the **Complete** column, use the dropdown box to select the **Completion Status** of the item. The available options are:
  - **Yes** – indicates the specific Project Checklist Item has been completed
  - **N/A** – indicates the specific Project Checklist Item is not applicable to the current project (PM Comment required)
- 15) In the **Completed On** column, enter the **Completion Date** of the item by using the calendar icon to select the date (or enter it directly into the content box in the date format **MM/DD/YYYY**)
- 16) In the **Project Manager Comments** column, enter any brief comments of notations pertaining to the **Project Checklist Item**.

**Note:** A comment is **required** for any items you indicated as **N/A** in the **Complete** column; any other comments for checklist items are optional and at the Project Manager's discretion

## IMPORTANT

Phase Checklist: 1001554 - 0 - 0.0 Initial Request

General

(Required): The Phase Checklist provides a project view of open or outstanding items that are to be addressed prior to ending the current Project Phase. When all items are complete or determined to be not applicable to the current Project Phase, Issue the Checklist record.

General

ID: 1001554 Revision: 0 Status: Draft

Date: 04/01/2022

Name: 0.0 Initial Request

Checklist Type: Project Phase Project Phase: 0.0 Initial Request

Comment:

Associated Project

Name	Current Project Phase	ID
Abbott Hall Second Floor MFA Teaching Studio Buildout 2022	0.0 Initial Request	1001785

Project Checklist Items

Export 1 total found

Sort	Checklist Category	Checklist Item	Complete?	Completed On	Project Manager Comments
<input type="checkbox"/>	1 Approvals	1. Initial Request activities and deliverables for this p	<input type="text"/>	<input type="text"/>	<input type="text"/>

Recorded By

Name: Wright, Teri

Save Save & Close Issue More x



## PROCESS

17) As you complete a **Project Phase Checklist**, use the **Save** and **Save & Close** buttons to save your progress

**Tip:** Depending on individual phase length and project dynamics, you may need to update a **Project Phase Checklist** over multiple sessions. Use the **Save** and/or **Save & Close** buttons to save your progress until you are ready to submit the completed checklist to your **Project Director**

Please continue to steps #18-19 once you are ready to submit your completed Project Phase Checklist for Project Director review and approval

## IMPORTANT

Phase Checklist: 1001554 - 0 - 0.0 Initial Request

General Edit Actions 17 **Save** **Save & Close** Issue More x

(Required): The Phase Checklist provides a project view of open or outstanding items that are to be addressed prior to ending the current Project Phase. When all items are complete or determined to be not applicable to the current Project Phase, Issue the Checklist record.

**General**

ID: 1001554 Revision: 0 Status: Draft

Date: 04/01/2022

Name: 0.0 Initial Request

Checklist Type: Project Phase Project Phase: 0.0 Initial Request

Comment:

**Associated Project**

Name	Current Project Phase	ID
Abbott Hall Second Floor MFA Teaching Studio Buildout 2022	0.0 Initial Request	1001785

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

**Project Checklist Items**

Export 1 total found Show: 10

Sort	Checklist Category	Checklist Item	Complete?	Completed On	Project Manager Comments
<input type="checkbox"/>	1 Approvals	1. Initial Request activities and deliverables for this phase have been completed	Yes	04/08/2022	

**Recorded By**

Name: Wright, Teri

Save Save & Close Issue More x



## PROCESS

18) As you complete the **Project Phase Checklist** and prepare for submission, update the **Comment** field with a brief message to your **Project Director**. In this message, be sure to include the following:

- **Callouts** – indicate any key / pertinent information that the Project Director should know regarding this phase of the project; this **Comment Box** will be the first thing he/she reviews upon receipt of your checklist
- **Desired Next Project Phase** – indicate a requested next phase for the project. As not all projects are alike in scope and/or process, some phases may not be applicable. Be sure to clearly state the phase for which you believe the project should be assigned next

19) To submit your completed **Project Phase Checklist** to the **Project Director**, click on the **Issue** button.

The Project Phase Checklist has now been issued to the Project Director for his/her review and approval

## IMPORTANT

Phase Checklist: 1001554 - 0 - 0.0 Initial Request

General Edit Actions Save Save **19** **Issue** Help

(Required): The Phase Checklist provides a project view of open or outstanding items that are to be addressed prior to ending the current Project Phase. When all items are complete or determined to be not applicable to the current Project Phase, Issue the Checklist record.

**18** General

ID: 1001554 Revision: 0 Status: Draft

Date: 04/01/2022

Name: 0.0 Initial Request

Checklist Type: Project Phase Project Phase: 0.0 Initial Request

**Comment** All project setup activities have been completed. Please move this project to Phase 1.0 - Feasibility & Pre-Design.

Associated Project

Name	Current Project Phase	ID
Abbott Hall Second Floor MFA Teaching Studio Buildout 2022	0.0 Initial Request	1001785

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

Project Checklist Items

Export 1 total found

Sort	Checklist Category	Checklist Item	Complete?	Completed On	Project Manager Comments
<input type="checkbox"/>	1 Approvals	1. Initial Request activities and deliverables for this phase have been completed	Yes	04/08/2022	

Recorded By

Name: Wright, Teri

Save Save & Close Issue More x



## PROCESS

Once the **Project Director** has reviewed your **Project Phase Checklist**, they will take one of two (2) available actions:

- Approval** - the checklist is advanced to the requested project phase, and will move between your **'My Projects' Phase** portlets, indicating the change in status and advancement of project phase

**▶ IMPORTANT**

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Reminders - Projects

Project Checklists In Revision

Created By	Project Name	Status	Checklist Type	Comment	Created Date/Time
No data to display.					

My Projects - Phase 0.0 Initial Request

Project Name	Project Status	Plan Complete	Project Manager	Primary Location
No data to display				

Reminders - Manage Space Requests

Requests

6 - My Active Requests

Related Links - Projects

Programs and Funding Sources

View Programs

Projects

Create a Capital Project

My Capital Projects

All Capital Projects

My Projects - Phase 1.0 Feasibility

Project Name	Project Status	Plan Complete	Project Manager	Primary Location
<a href="#">Abbott Hall Second Floor...</a>			Aalsburg, Alan Michael	

My Projects - Phase 2.0 Design

Project Name	Project Status	Plan Complete	Project Manager	Primary Location
No data to display				

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- Workload by Primary Project Manager

Space Information

- Available Spaces
- Open Spaces
- Space Class Parent
- Space Report
- Occupant Contact List
- Occupant Location Contact List
- Building Occupant List
- Department Base Data Report
- Department Base Data v2
- Office Area Capacity
- Overall Total Campus Square Footage
- Room and Department Base Data Only
- Space Allocation
- Space Class Count by Building



## PROCESS

Once the **Project Director** has reviewed your **Project Phase Checklist**, he/she will take one of two (2) available actions:

2. **Return for Revision** - the checklist appears in your **Project Checklists In Revision** portlet, indicating that the **Project Director** has a follow-up question and/or revision request for your checklist

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Created By	Project Name	Status	Checklist Type	Comment	Created Date/Time
Doug Director	1001224-Pete's New Project	Revision In Progress	Project Phase	Director, Doug (2/18): Please change the Completed On date for checklist item #1...	02/19/2019 07:52:29

Project Name | Project Status | Plan Complete

Abbott Hall Second Floor MFA Teaching Studio Buildout 2022

Items per page: 50 | 1 - 1 of 1 items | 1 of 1 pages

My Projects - Phase 1.0 Feasibility

Project Name	Project Status	Plan Complete	Project Manager	Primary Location
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▶ IMPORTANT



## PROCESS

To revise the **Project Phase Checklist**,

20) Click on the revision item in the **Project Checklists In Revision** portlet

<<Upon clicking, the **Project Phase Checklist** will in a new window>>

▶ IMPORTANT

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Reminders - Projects

Project Checklists In Revision

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Reminders - Manage Space R...

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- 6 - My Active Requests

Related Links - Projects

- Programs and Funding Sources
  - View Programs
- Projects
  - Create a Capital Project
  - My Capital Projects
  - All Capital Projects

Project Reports

- Progress Reports
- Current Budget Balance (Summary by I
- Current Budget Balance (Detail) Report
- Project Area Summary
- Project Financial Summary
- Project Schedule Summary
- Project Contact List
- Scheduled Task Compliance
- Vendor Characteristics Query
- Workload by Primary Project Manager I

Space Information

- 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

My Projects - Phase 1.0 Feasibility

Project Name	Project Status	Plan Complete	Project Manager	Primary Location
Abbott Hall Second Floor MFA Teaching Studio Buildout 2022				
Tech Lab HVAC C...	On Hold		Wright,Teri	

Items per page: 50 | 1 - 1 of 1 items | 1 of 1 pages



## PROCESS

21) Review the comments and/or revision request(s) from the **Project Director** that he/she has added in the **Comment** field

22) Based on the feedback, make any necessary modifications to the **Project Checklist / Checklist Items**

**Tip:** Use the **Save** and/or **Save & Close** buttons to save your progress until you are ready to re-submit the checklist to your **Project Director**

23) When you are ready submit the revised checklist to the **Project Director**, click on the **Issue** button

Phase Checklist: 1001554 - 0 - 0.0 Initial Request

General Audit Actions 23 Id To Bookmarks Print Help Save Save & Close Issue More x

(Required): The Phase Checklist provides a project view of open or outstanding items that are to be addressed prior to ending the current Project Phase. When all items are complete or determined to be not applicable to the current Project Phase, Issue the Checklist record.

**General**

ID: 1001554 Revision: 0 Status: Draft

\* Date: 04/01/2022

\* Name: 0.0 Initial Request 21

\* Checklist Type: Project Phase Project Phase: 0.0 Initial Request

Comment: Director, Doug (2/18): Please change the Completed On date for checklist item #1 to 2/15/19 and re-submit.  
All project setup activities have been completed. Please move this project to Phase 1.0 - Feasibility & Pre-Design.

**Associated Project**

Name	Current Project Phase	ID
Abbott Hall Second Floor MFA Teaching Studio Buildout 2022	0.0 Initial Request	1001785

22 items per page: 10 1 - 1 of 1 items 1 of 1 pages

**Project Checklist Items**

Export 1 total found Show: 10

Sort	Checklist Category	Checklist Item	Complete?	Completed On	Project Manager Comments
<input type="checkbox"/>	1 Approvals	1. Initial Request activities and deliverables for this phase have been completed	Yes	04/08/2022	

**Recorded by**

Name: Wright, Teri

Save Save & Close Issue More x

▶ IMPORTANT