



Course 2

# Introduction to Facilities Connect and Creating a Project



## In today's course, we will explore the following:

- System Orientation / Navigation
- Useful Tips
- Creating a New Project



# Section 1 | **System Orientation and Navigation**



# FACILITIES CONNECT HOME SCREEN

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** | **Project**

**Home** | Portfolio

---

**Home**  Open In New Window My Bookmarks

**Reminders - Projects**

- Notices
- Tasks

**Reminders - Manage Space 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	Primary Contact	Primary Location
No data to display.				

**My Projects - Phase 1.0 Feasibility**

Project Name	Project Status	Plan Complete	Primary Contact	Primary Location
No data to display.				

**My Projects - Phase 2.0 Design**

Project Name	Project Status	Plan Complete	Primary Contact	Primary Location
No data to display.				

**My Projects - Phase 3.0 Construction Procurement**

**My Projects - Phase 4.0 Construction**

**My Projects - Phase 5.0 Operational**

**My Projects - Phase 6.0 Close-Out**

**Last Visited**

**Project Reports**

- [All Progress Reports](#)
- [Current Budget Balance \(Summary by PM\) Req](#)
- [Current Budget Balance \(Detail\) Report - All f](#)
- [Project Area Summary](#)
- [Project Financial Summary](#)
- [Project Schedule Summary](#)
- [Project Contact List](#)
- [Scheduled Task Compliance](#)
- [Vendor Characteristics Query](#)
- [Workload by Primary Project Manager](#)

**Space Information**

- [Area by Space Class Parent](#)
- [Assignee Space Report](#)
- [Building Data](#)
- [Building Occupant Contact List](#)
- [Building Occupant List](#)
- [Department Base Data Report](#)
- [Department Base Data v2](#)
- [Office Area Capacity](#)
- [Overall Total Campus Square Footage](#)
- [Space Allocation](#)
- [Space Class Count by Building](#)
- [Space Report by Building](#)
- [Campus Mapping](#)



## FACILITIES CONNECT HOME SCREEN

### GETTING STARTED

A. The **Portal Tabs** provide general navigation across Facilities Connect; the selected tab will be highlighted in light purple

- [Home Tab](#)
- [Portfolio Tab](#)

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Home | Portfolio

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## FACILITIES CONNECT HOME SCREEN

### GETTING STARTED

B. The **Focus Bar** provides project search functionality and changes the orientation of the

- [Company](#)
- [Project](#)
- [Magnifying Glass \(Search\)](#)

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**Company** **Project**

Home Portfolio

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## FACILITIES CONNECT HOME SCREEN

### GETTING STARTED

- C. The **Related Links - Projects** portlet contains the following links
- **Create a Capital Project** – Launches the form to initiate a new project
  - **My Capital Projects** – Provides a clickable list of all projects for which the user is associated (access / edit rights)
  - **All Capital Projects** – Provides a clickable list of all NU Facilities projects (read only access for those projects which the user is not associated)

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Home Portfolio

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## FACILITIES CONNECT HOME SCREEN

### GETTING STARTED

D. The 'My Projects' portlets provide a clickable queue of the user's associated projects, grouped by the current project phase (each portlets can be expanded or collapsed)

- [Project Checklists in Revision](#)
- [Phase 0.0 – Initial Request](#)
- [Phase 1.0 – Feasibility](#)
- [Phase 2.0 – Design](#)
- [Phase 3.0 – Construction Procurement](#)
- [Phase 4.0 – Construction](#)
- [Phase 5.0 – Operational](#)
- [Phase 6.0 – Close-Out](#)

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Company Project

Home Portfolio

Home

Open In New Window My Bookmarks

Reminders - Projects

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Reminders - Manage Space Requests

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Related Links - Projects

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Programs and Funding Sources

View Programs

Projects

Create a Capital Project

My Capital Projects

All Capital Projects

My Projects - Phase 2.0 Design

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## FACILITIES CONNECT HOME SCREEN

### GETTING STARTED

E. The **Project Reports portlet** provides a clickable list of available project management module reports

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Home Portfolio

Home

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- Notices
- Tasks

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## FACILITIES CONNECT HOME SCREEN

### GETTING STARTED

F. **Project Focus** is an available option on the **Focus Bar** for viewing project management options **within** a selected project.

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[Company](#) [Project](#)

Home

Home [Open In New Window](#) [My Bookmarks](#)

**Related Links - Capital Project General**

- Contracts
  - Purchase Orders

**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

**Progress Reports**

[Add](#) [Delete](#)

ID	Fiscal Period	Title	Budgeted Cost Of Work Performed	Actual Cost Period End	Status
No data to display.					

**Project Contacts**

Role	Person	Work Phone	Email	Primary Organization
Project Director	Director,Diane			
Project Primary Manager	Project Manager,Pete			



## FACILITIES CONNECT HOME SCREEN

### GETTING STARTED

- G. To search and select a specific project for modification, click the **Magnifying Glass (Search)** on the **Focus Bar**
- H. Once a project is selected, the **Project Name** will appear in the space immediately to the left of the **Focus Bar**. The **Project Focus** will now be highlighted in light purple, indicating that it is being displayed.

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Project Data For 1001090-Abbott Hall Second Floor MFA Teaching Studio Buildout 2018
Company
Project

**Home** Open In New Window | My Bookmarks

**Related Links - Capital Project General**

- Contracts
  - Purchase Orders

**Progress Reports**

ID	Fiscal Period	Title	Budgeted Cost Of Work Performed	Actual Cost Period End	Status
No data to display.					

**Related Links - Capital Project Progress**

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  - Project Report
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**Project Contacts**

Role	Person	Work Phone	Email	Primary Organization
Project Director	Director,Diane			
Project Primary Manager	Project Manager,Pete			



## FACILITIES CONNECT HOME SCREEN

### GETTING STARTED

I. The **Related Links – Capital Project Progress** portlet will also be displayed, providing several clickable link options available to the user in managing his/her 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 punchlist 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

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Project Data For 1001090-Abbott Hall Second Floor MFA Teaching Studio Buildout 2018 Company Project

**Home** Open In New Window | My Bookmarks

**Related Links - Capital Project General**

- Contracts
  - Purchase Orders

**Progress Reports**

ID	Fiscal Period	Title	Budgeted Cost Of Work Performed	Actual Cost Period End	Status
No data to display.					

**Related Links - Capital Project Progress**

- Progress
  - Request For Information
  - Project Report
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  - Potential Change Order
- Risk
  - Risk Item
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**Project Contacts**

Role	Person	Work Phone	Email	Primary Organization
Project Director	Director,Diane			
Project Primary Manager	Project Manager,Pete			



## FACILITIES CONNECT HOME SCREEN

### GETTING STARTED

J. The **Portfolio Portal Tab** provides new options including the ability to search and update external companies and external contacts in Facilities Connect

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Company Project

Home Portfolio

Home > Portfolio

Open In New Window Add to Bookmarks My Bookmarks

**Geography**

- Countries
- States
- Cities

**Locations**

- Property
- Buildings
- Land
- Structures
- Floors
- Spaces

**Organizations**

- Departments
- External Companies
- Workgroups

**People**

- Employees
- Consultants
- External Contacts

**Specifications**

- Building Equipment
- Consumables
- Core
- Keys
- Key Rings
- Locks
- Tools & Test Equipment
- Vehicles

**Assets**

- Building Equipment
- Core
- Keys
- Key Rings
- Locks
- Tools & Test Equipment
- Vehicles



## FACILITIES CONNECT HOME SCREEN

### GETTING STARTED

- K. The **Organizations** portlet contains a clickable link to view available External Companies (e.g. vendors)
- L. The **People** portlet contains a clickable link to view and update External Contacts (e.g. vendors).
  - Once an **External Contact** has been added and associated with an **External Company**, they may be classified in a specific role (e.g. General Contractor) and associated with a project

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## Section 2 | **Useful Tips for Facilities Connect**



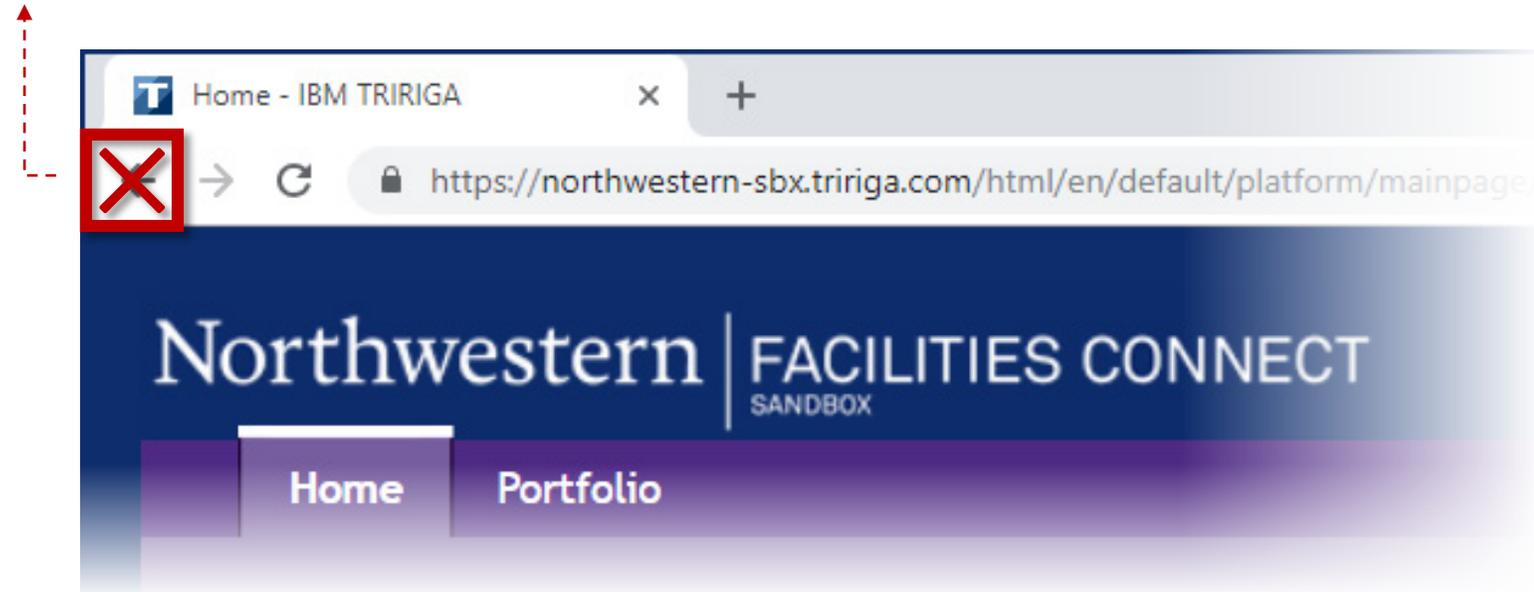
## FACILITIES CONNECT - USEFUL TIPS

## ▼ GETTING STARTED

- The browser **Back** button is not supported in Facilities Connect.

Use of the browser **Back** button may log you out of Facilities Connect inadvertently, and create loss of unsaved work

**⚠ Do Not** click the browser **Back** button. Use available Facilities Connect action buttons and links throughout the system for navigation





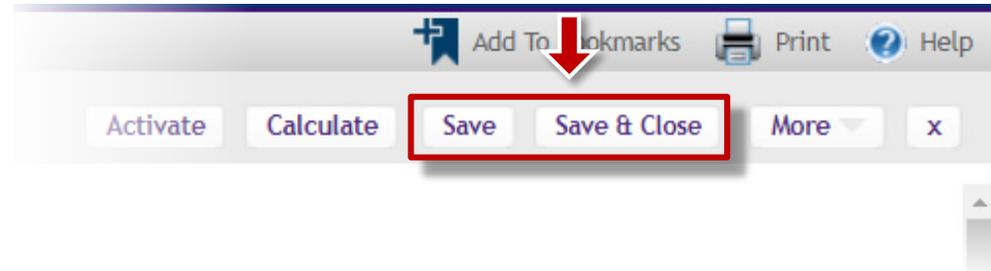
## FACILITIES CONNECT - USEFUL TIPS

### ▼ GETTING STARTED

- Save work often; unsaved changes can easily be lost in Facilities Connect.

The **Save** and **Save & Close** buttons are located in the top right corner of most screens and forms in Facilities Connect

**!** Save your work often using the **Save** and **Save & Close** buttons





## FACILITIES CONNECT - USEFUL TIPS

## ▼ GETTING STARTED

- Be mindful of the **Focus Bar**. These buttons allow you to toggle between a **Company Focus** and a **Project Focus** in Facilities Connect

**Company Focus (default)**– user view and functionality oriented for initiating, accessing, or working **across** projects

**Project Focus** – user view and functionality oriented for working **within** an existing project;

Additionally, the **Magnifying Glass** button allows you to quickly search and select a project for viewing or modification.

**⚠ Be mindful of the Focus Bar.** These buttons allow you to switch between the **Company** and **Project** focus, or use the Magnifying Glass button to search and select available projects.





### FACILITIES CONNECT - USEFUL TIPS

#### ▼ GETTING STARTED

- **Radio buttons** – allow the user to select only one (1) option
- **Checkboxes** – allow the user to select multiple options

**⚠ Radio buttons** allow you to choose one (1) option; **Checkboxes** allow you to choose multiple options

Radio buttons | Circular; allows for only one (1) option to be selected

<input checked="" type="radio"/>	Evanston Campus		
<input type="radio"/>	Evanston Campus	1007 Church	
<input type="radio"/>	Evanston Campus	1007 Church	02

Checkboxes | Rounded Squares; allows for multiple options to be selected

<input checked="" type="checkbox"/>	Evanston Campus	1007 Church	02
<input checked="" type="checkbox"/>	Evanston Campus	1007 Church	02
<input checked="" type="checkbox"/>	Evanston Campus	1007 Church	02



## FACILITIES CONNECT - USEFUL TIPS

## ▼ GETTING STARTED

- **Project Record Status** controls the project record's behavior and available options

**⚠ Be aware of the current **Project Record Status**; it controls the project record's behavior and available options**

General

ID 1001090

\* Date 11/25/2018

\* Name Abbott Hall Second Floor MFA Teaching Studio Buildout 2018

\* Project Reporting Name Abbott Hall Second Floor MFA Teaching Studio Buildout 2018

Status

**Status Active**

- Record is **Active**
- Record behaves as **Read-Only**
- Record must be placed into **Revision** in order to edit the project's fields and attributes

**Status Revision In Progress**

- Record is in **Revision**
- Record is **Editable**
- Record should be returned to **Active** status when changes are not actively being performed



## Section 3 | **Creating a Project**



# Creating a New Project

## What will we review?

Initiate	Setup	Execute	Manage	Closeout
▼ Step	▼ Where	▼ Requirement		
Request Capital Chartstring (If applicable)	CURRENT	When applicable		
<b>Create Project</b> <span>NEW</span> <ul style="list-style-type: none"> <li>Apply Naming Conventions</li> <li>Select between Capitalized or Non-Capitalized</li> <li>Apply Project Chartstring (if applicable)</li> <li>Add Location Information</li> </ul>	FACILITIES CONNECT	Always		
<b>Add NU Facilities Project Contacts</b>	FACILITIES CONNECT	Always		
<b>Apply Large / Small Project Template</b> <span>NEW</span>	FACILITIES CONNECT	Always		
<b>Create Draft / Save Project</b> <span>NEW</span>	FACILITIES CONNECT	Always		

2



# Creating a New Project

What will we review?

Initiate				Setup				Execute				Manage				Closeout			
▼ Step	▼ Where			▼ Requirement			▼ Frequency												
<b>Add Primary Customer Contact</b>	FACILITIES CONNECT			When applicable			Project Initiation												
<b>Add Supplemental Project Information</b>	FACILITIES CONNECT			Always			Project Initiation (update as necessary)												
<ul style="list-style-type: none"> <li>Select Project Type</li> <li>Select Project Classification</li> <li>Select Project Status</li> </ul>																			
<b>Add Project Scope</b>	FACILITIES CONNECT			Always			Project Initiation (update as necessary)												
<ul style="list-style-type: none"> <li>Add Scope Description</li> <li>Enter Site Information</li> <li>Select Project Impacted Area</li> </ul>																			



# Step 1

## Access the Create a New Capital Project Form

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**Company** **Project**

**Home** Portfolio

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**Home** Open In New Window | My Bookmarks

**Reminders - Projects**

- Notices
- Tasks

**Reminders - Manage Space Requests**

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**Company** | **Project**

**Home** | Portfolio

**Home** > **Create a Capital Project** Print | Open In New Window | Add to Bookmarks | My Bookmarks

**General** | Scope | Schedule | Budget | Procurement | Contacts | Notes & Documents Create Draft | x

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

**General**

ID Status

\* Date 11/24/2018 25 x

\* Name

\* Project Reporting Name

**Details**

Project Type  Project Classification New Construction

Project Status  Project Phase 0.0 Initial Request

Project Website about:blank =>

\* Project Category

Accounting Cost Center  Project Cost/SqFt (Budget Current / Project Gross Construction Area) 5.00 US Dollars

**Units**

**Environmental**



Step 2

# Apply Project Name and Date Information

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** | **Project**

**Home** | Portfolio

Home > **Create a Capital Project** Print | Open In New Window | Add to Bookmarks | My Bookmarks

General | Scope | Schedule | Budget | Procurement | Contacts | Notes & Documents Create Draft | x

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

**General**

ID	Status
* Date 11/24/2018 <input type="text"/> <input type="button" value="25"/> <input type="button" value="x"/> * Name <input type="text"/> * Project Reporting Name <input type="text"/>	

**Details**

Project Type <input type="text"/>	Project Classification <input type="text" value="New Construction"/>
Project Status <input type="text"/>	Project Phase 0.0 Initial Request
Project Website about:blank	
* Project Category <input type="text"/>	
Accounting Cost Center <input type="text"/>	Project Cost/SqFt (Budget Current / Project Gross Construction Area) 5.00 US Dollars

**Units**

**Environmental**





## Step 2

## Apply Project Name and Date Information

IMPORTANT  
CONCEPT

### Naming a Project

The name of project in Facilities Connect must adhere to the following convention:

Building / Area  
Name

+

Sub-Location

+

Description

+

Effort

+

Year



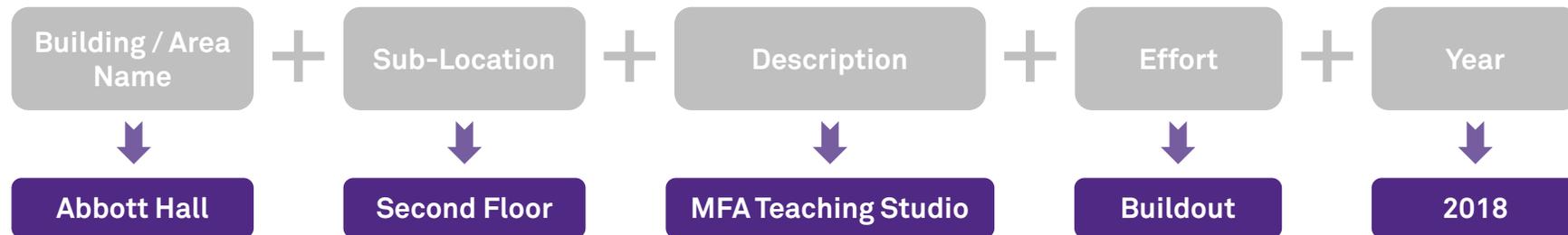
## Step 2

## Apply Project Name and Date Information

EXAMPLE

### Naming a Project

The name of project in Facilities Connect must adhere to the following convention:





## Step 2

## Apply Project Name and Date Information

EXAMPLE

### Naming a Project

Resulting Project Name / Project Reporting Name:

Abbott Hall



Second Floor



MFA Teaching Studio



Buildout



2018



**Abbott Hall Second Floor MFA Teaching Studio Buildout 2018**



Step 3

# Select Project Category

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** | **Project**

**Home** | Portfolio

Home > **Create a Capital Project** Print | Open In New Window | Add to Bookmarks | My Bookmarks

General | Scope | Schedule | Budget | Procurement | Contacts | Notes & Documents Create Draft | x

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

**General**

ID Status

\* Date 11/24/2018 25 x

\* Name Abbott Hall Second Floor MFA Teaching Studio Buildout 2018

\* Project Reporting Name Abbott Hall Second Floor MFA Teaching Studio Buildout 2018

**Details**

Project Type Project Classification New Construction

Project Status Project Phase 0.0 Initial Request

Project Website about:blank

→ \* Project Category Accounting Cost Center Project Cost/SqFt (Budget Current / Project Gross Construction Area) 5.00 US Dollars

**Units**

**Environmental**



Step 3

# Select Project Category

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** | **Project**

**Home** | **Portfolio**

Home > **Create a Capital Project** Print | Open In New Window | Add to Bookmarks | My Bookmarks

General | Scope | Schedule | Budget | Procurement | Contacts | Notes & Documents Create Draft | x

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

**General**

ID	Status
* Date: 11/24/2018	
* Name: Abbott Hall Second Floor MFA Teaching Studio Buildout 2018	
* Project Reporting Name: Abbott Hall Second Floor MFA Teaching Studio Buildout 2018	

**Details**

Project Type	Project Classification: New Construction
Project Status	Project Phase: 0.0 Initial Request
Project Website: about:blank	
* Project Category	
Accounting Cost Center	Project Cost/SqFt (Budget Current / Project Gross Construction Area): 5.00 US Dollars

**Units**

- Capitalized
- Non-Capitalized

**Environmental**



Step 4

# Add Project Chartstring (Capitalized Only)

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** | **Project**

**Home** | Portfolio

Home > **Create a Capital Project** Print | Open In New Window | Add to Bookmarks | My Bookmarks

General | Scope | Schedule | Budget | Procurement | Contacts | Notes & Documents Create Draft | x

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

**General**

ID	Status
* Date: 11/24/2018	
* Name: Abbott Hall Second Floor MFA Teaching Studio Buildout 2018	
* Project Reporting Name: Abbott Hall Second Floor MFA Teaching Studio Buildout 2018	

**Details**

Project Type	Project Classification: New Construction
Project Status	Project Phase: 0.0 Initial Request
Project Website: about:blank	
* Project Category: Capitalized	* Chartstring
Accounting Cost Center	Project Cost/SqFt (Budget Current / Project Gross Construction Area): 5.00 US Dollars

**Units**

**Environmental**



# Step 5

## Add Project Primary Location

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** | **Project**

**Home** | Portfolio

Home > **Create a Capital Project** Print | Open In New Window | Add to Bookmarks | My Bookmarks

General | Scope | Schedule | Budget | Procurement | Contacts | Notes & Documents Create Draft | x

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

**General**

ID Status

\* Date 11/25/2018 25 x

\* Name Abbott Hall Second Floor MFA Teaching Studio Buildout 2018

\* Project Reporting Name Abbott Hall Second Floor MFA Teaching Studio Buildout 2018

**Details**

Project Type Project Classification New Construction

Project Status Project Phase 0.0 Initial Request

Project Website about:blank

\* Project Category Capitalized \* Chartstring 812-1830000-80039341-01

Accounting Cost Center 812-1830000-80039341-01 Project Cost/SqFt (Budget Current / Project Gross Construction Area) 5.00 US Dollars

\* Primary Customer Contact

**Primary Location** ➔ Find | Clear

\* Location Path



# Step 5

## Add Project Primary Location

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** | **Project**

**Home** | Portfolio

Home > Create a Capital Project Print | Open In New Window | Add to Bookmarks | My Bookmarks

General | Scope | Schedule | Budget | Procurement | Contacts | Notes & Documents Create Draft x

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

**General**

ID

\* Date

\* Name

\* Project Reporting Name

**Details**

Project Type

Project Status

Project Website

\* Project Category

Accounting Cost Center

\* Primary Customer

**Primary Location**

\* Location Path

OK | Export | Cancel

1500 / 4852 [Export](#) 48520 total found [Apply Filters](#) [Clear Filters](#) Show: 10

Campus	Building	Floor	Wing	Name	Type	Hierarchy	Status
<input type="radio"/> Contains	<input type="radio"/> Contains	<input type="radio"/> Contains	<input type="radio"/> Contains	<input type="radio"/> Contains	<input type="radio"/> Contains	<input type="radio"/> Contains	<input type="radio"/> Contains
<input type="radio"/> Evanston Campus	1800 Sherman	06		00607	Space	\\Locations\Evanston Campus\1800 Sherman\06\00607	Active
<input type="radio"/> Evanston Campus	1800 Sherman	06		00608	Space	\\Locations\Evanston Campus\1800 Sherman\06\00608	Active
<input type="radio"/> Evanston Campus	1800 Sherman	06		00609A	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609A	Active
<input type="radio"/> Evanston Campus	1800 Sherman	06		00609B	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609B	Active
<input type="radio"/> Evanston Campus	1800 Sherman	06		00609C	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609C	Active
<input type="radio"/> Evanston Campus	1800 Sherman	06		00609D	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609D	Active
<input type="radio"/> Evanston Campus	1800 Sherman	06		00609E	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609E	Active
<input type="radio"/> Evanston Campus	1800 Sherman	06		00609F	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609F	Active
<input type="radio"/> Evanston Campus	1800 Sherman	06		00610A	Space	\\Locations\Evanston Campus\1800 Sherman\06\00610A	Active
<input type="radio"/> Evanston Campus	1800 Sherman	06		00610B	Space	\\Locations\Evanston Campus\1800 Sherman\06\00610B	Active

Find | Clear



# Step 5

## Add Project Primary Location

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** **Project**

Home Portfolio

Home > Create a Capital Project Print Open In New Window Add to Bookmarks My Bookmarks

General Scope Schedule Budget Procurement Contacts Notes & Documents Create Draft x

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

**General**

ID

\* Date

\* Name

\* Project Reporting Name

1500 / 4852 Export 48520 total found Show: 10

Campus	Building	Floor	Wing	Name	Type	Hierarchy	Status
Contains	Contains	Contains	Contains	Contains	Contains	Contains	Contains
<a href="#">Evanston Campus</a>	1800 Sherman	06		00607	Space	\\Locations\Evanston Campus\1800 Sherman\06\00607	Active
<a href="#">Evanston Campus</a>	1800 Sherman	06		00608	Space	\\Locations\Evanston Campus\1800 Sherman\06\00608	Active
<a href="#">Evanston Campus</a>	1800 Sherman	06		00609A	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609A	Active
<a href="#">Evanston Campus</a>	1800 Sherman	06		00609B	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609B	Active
<a href="#">Evanston Campus</a>	1800 Sherman	06		00609C	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609C	Active
<a href="#">Evanston Campus</a>	1800 Sherman	06		00609D	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609D	Active
<a href="#">Evanston Campus</a>	1800 Sherman	06		00609E	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609E	Active
<a href="#">Evanston Campus</a>	1800 Sherman	06		00609F	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609F	Active
<a href="#">Evanston Campus</a>	1800 Sherman	06		00610A	Space	\\Locations\Evanston Campus\1800 Sherman\06\00610A	Active
<a href="#">Evanston Campus</a>	1800 Sherman	06		00610B	Space	\\Locations\Evanston Campus\1800 Sherman\06\00610B	Active

Details

- Project Type
- Project Status
- Project Website
- \* Project Category
- Accounting Cost Center
- \* Primary Customer
- \* Primary Location
- \* Location Path

Find | Clear



# Step 5

## Add Project Primary Location

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** **Project**

Home Portfolio

Home > Create a Capital Project Print Open In New Window Add to Bookmarks My Bookmarks

General Scope Schedule Budget Procurement Contacts Notes & Documents Create Draft x

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

**General**

ID

\* Date

\* Name

\* Project Reporting Name

**Details**

Project Type

Project Status

Project Website

\* Project Category

Accounting Cost Center

\* Primary Customer

**Primary Location**

\* Location Path

1500 / 4852 Export 48520 total found Apply Filters Clear Filters

Campus	Building	Floor	Wing	Name	Type	Hierarchy	Status
Contains	Contains	Contains	Contains	Contains	Contains	Contains	Contains
<input checked="" type="radio"/>	Evanston Campus	1800 Sherman	06	00607	Space	\\Locations\Evanston Campus\1800 Sherman\06\00607	Active
<input type="radio"/>	Evanston Campus	1800 Sherman	06	00608	Space	\\Locations\Evanston Campus\1800 Sherman\06\00608	Active
<input type="radio"/>	Evanston Campus	1800 Sherman	06	00609A	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609A	Active
<input type="radio"/>	Evanston Campus	1800 Sherman	06	00609B	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609B	Active
<input type="radio"/>	Evanston Campus	1800 Sherman	06	00609C	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609C	Active
<input type="radio"/>	Evanston Campus	1800 Sherman	06	00609D	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609D	Active
<input type="radio"/>	Evanston Campus	1800 Sherman	06	00609E	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609E	Active
<input type="radio"/>	Evanston Campus	1800 Sherman	06	00609F	Space	\\Locations\Evanston Campus\1800 Sherman\06\00609F	Active
<input type="radio"/>	Evanston Campus	1800 Sherman	06	00610A	Space	\\Locations\Evanston Campus\1800 Sherman\06\00610A	Active
<input type="radio"/>	Evanston Campus	1800 Sherman	06	00610B	Space	\\Locations\Evanston Campus\1800 Sherman\06\00610B	Active

OK Export Cancel





# Step 6

## Add Project Primary Manager

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** | **Project**

**Home** | Portfolio

Home > Create a Capital Project Print | Open In New Window | Add to Bookmarks | My Bookmarks

General | Scope | Schedule | Budget | Procurement | **Contacts** | Notes & Documents Create Draft x

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

**Contacts** Add Person | Remove

Export 2 total found Apply Filters Clear Filters Show: 20

Role	Person	Work Phone	Fax	Email	Primary Organization
<input type="checkbox"/> Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/> Project Director					
<input type="checkbox"/> Project Primary Manager					

**Contacts Description**

Font Family | Font Size | Paragraph

Create Draft x

Contact Role: 1025610 - Project Primary Manager-Capital Project Print Help

Save Save & Close More x

(Required): Select the contact and their role.

Linked Form Capital Project Linked Record

**Contact** Find Clear

\* Name  ID

Primary Organization

Email Mobile

Work Phone Work Fax

**Role** Find Clear

\* Role Project Primary Manager

Save Save & Close More x



# Step 6

## Add Project Primary Manager

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** | **Project**

**Home** | Portfolio

Home > **Create a Capital Project** Print | Open In New Window | Add to Bookmarks | My Bookmarks

General | Scope | Schedule | Budget | Procurement | **Contacts** | Notes & Documents Create Draft x

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

**Contacts** Add Person | Remove

Export 2 total found Apply Filters Clear Filters Show: 20

Role	Person	Work Phone	Fax	Email	Primary Organization
<input type="checkbox"/> Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/> Project Director					
<input type="checkbox"/> Project Primary Manager					

**Contacts Description**

Font Family | Font Size | Paragraph

Create Draft x

Contact Role: 1025610 - Project Primary Manager-Capital Project Print Help

Save **Save & Close** More x

(Required): Select the contact and their role.

**Linked Form** Capital Project Linked Record

**Contact** Find | Clear

\* Name  ID

Primary Organization

Email Mobile

Work Phone Work Fax

**Role** Find | Clear

\* Role

Save Save & Close More x



# Step 7

## Add Project Director

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** | **Project**

**Home** | Portfolio

Home > Create a Capital Project Print | Open In New Window | Add to Bookmarks | My Bookmarks

General | Scope | Schedule | Budget | Procurement | **Contacts** | Notes & Documents Create Draft x

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

**Contacts** Add Person | Remove

[Export](#) 2 total found [Apply Filters](#) [Clear Filters](#) Show: 20

<input type="checkbox"/>	! Role	Person	Work Phone	Fax	Email	Primary Organization
<input type="checkbox"/>	Contains	Contains	Contains	Contains	Contains	Contains
	<b>Project Director</b>					
<input type="checkbox"/>	Project Primary Manager	Project Manager,Pete				

**Contacts Description**

Font Family | Font Size | Paragraph |

Create Draft x



Step 8

# Create Draft

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** | **Project**

**Home** | Portfolio

Home > **Create a Capital Project** Print | Open In New Window | Add to Bookmarks | Bookmarks

General | Scope | Schedule | Budget | Procurement | **Contacts** | Notes & Documents **Create Draft** x

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

**Contacts** Add Person | Remove

Export 2 total found Apply Filters Clear Filters Show: 20

Role	Person	Work Phone	Fax	Email	Primary Organization
Contains	Contains	Contains	Contains	Contains	Contains
Project Director	Director, Diane				
Project Primary Manager	Project Manager, Pete				

**Contacts Description**

Font Family | Font Size | Paragraph |

Create Draft x



Step 9

# Apply Project Template

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** | **Project**

**Home** | Portfolio

Home > **Create a Capital Project** Print | Open In New Window | Add to Bookmarks | My Bookmarks

General | Scope | Schedule | Budget | Procurement | **Contacts** | Notes & Documents Activate | Calculate | Save | Save & Close | **More**

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

**Contacts** Add Person | Remove

[Export](#) 2 total found [Apply Filters](#) [Clear Filters](#) Show: 20

<input type="checkbox"/>	Role	Person	Work Phone	Fax	Email	Primary Organization
<input type="checkbox"/>	Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	Project Director	Director,Diane				
<input type="checkbox"/>	Project Primary Manager	Project Manager,Pete				

**Contacts Description**

Font Family | Font Size | Paragraph |

Activate | Calculate | Save | Save & Close | More | x



Step 9

# Apply Project Template

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** | **Project**

**Home** | Portfolio

Home > **Create a Capital Project** Print | Open In New Window | Add to Bookmarks | My Bookmarks

General | Scope | Schedule | Budget | Procurement | **Contacts** | Notes & Documents Activate | Calculate | Save | Save & Close | More | x

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

**Contacts** Add Person | Remove

[Export](#) 2 total found [Apply Filters](#) [Clear Filters](#) Show: 20

<input type="checkbox"/>	Role	Person	Work Phone	Fax	Email	Primary Organization
<input type="checkbox"/>	Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	Project Director	Director,Diane				
<input type="checkbox"/>	Project Primary Manager	Project Manager,Pete				

**Contacts Description**

Font Family | Font Size | Paragraph |

Activate | Calculate | Save | Save & Close | More | x

Apply Template



Step 9

# Apply Project Template

Northwestern | FACILITIES CONNECT

Welcome, NU Wildcat | Sign Out | About

Company Project

Home Portfolio

Home > Create a Capital Project

Print Open In New Window Add to Bookmarks My Bookmarks

General Scope Schedule Budget Procurement **Contacts** Notes & Documents

Activate Calculate Save Save & Close More x

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

**Contacts**

Export 2 total found Apply Filters Clear Filters

! Role

- Contains
- Project Director
- Project Primary Manager

**Contacts Description**

Font Family Font Size Paragraph

✂️ 📄 📁 📧 📎 🔄 🔄 🔄 🔄 🔄

**Capital Project Template PopUp:**

(Optional): Select the Capital Project Template to be applied.

**Capital Project Templates**

Export 2 total found Apply Filters Clear Filters Show: 20

ID	Name
Contains	Contains
1000915	Small Project (Schedule Includes Major Project Phases Only)
1000916	Large Project (Schedule Includes All Project Phases)

Continue x

Continue x

Activate Calculate Save Save & Close More x



Step 10

# Save Project

Northwestern | FACILITIES CONNECT Welcome, NU Wildcat | Sign Out | About

**Company** | **Project**

**Home** | Portfolio

Home > **Create a Capital Project** Print | Open In New Window | Add Bookmarks | My Bookmarks

General | Scope | Schedule | Budget | Procurement | **Contacts** | Notes & Documents Activate | Calculate | **Save** | Save & Close | More | x

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

**Contacts** Add Person | Remove

Export 2 total found Apply Filters Clear Filters Show: 20

<input type="checkbox"/>	! Role	Person	Work Phone	Fax	Email	Primary Organization
<input type="checkbox"/>	Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	Project Director	Director,Diane				
<input type="checkbox"/>	Project Primary Manager	Project Manager,Pete				

**Contacts Description**

Font Family | Font Size | Paragraph |

Activate | Calculate | Save | Save & Close | More | x



# Create a New Project

## Exercise

Now that we have seen the process of **Creating a New Project**, let's practice together in Facilities Connect.

Open your laptop and enter the following address in your browser:

<https://northwestern-qa.tririga.com>



# Conclusion

## Wrap Up

This concludes Course 2: Introduction to Facilities Connect and Creating a Project

**Thank you for your participation!**

The next course in the Facilities Connect – Project Management series is:

**Course 3: Updating and Managing Projects in Facilities Connect**



# Conclusion

## Upcoming Courses + Support Calendar

WK	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
DECEMBER 2018	3	4	5	6	7	
	1		<p><b>2</b></p> <p><b>Intro to Facilities Connect and Creating a Project</b> 10-11:30am (Norris – 205A Louis North)</p> <p><b>Open Lab</b> 2-4pm (EV – 2020 Ridge)</p>	<p><b>Open Lab</b> 9-11am (EV – 2020 Ridge)</p> <p><b>2</b></p> <p><b>Intro to Facilities Connect and Creating a Project</b> 2-3:30pm (Norris – 102 Evans)</p>	<p><b>3</b></p> <p><b>Updating and Managing a Project in Facilities Connect</b> 10-11:30am (Norris – 208 Armadillo)</p> <p><b>Open Lab</b> 2-4pm (EV – 2020 Ridge)</p>	
	10	11	12	13	14	
	2	<p><b>Open Lab</b> 9-11am (EV – 2020 Ridge)</p> <p><b>3</b></p> <p><b>Updating and Managing a Project in Facilities Connect</b> 2-3:30pm (Norris – 208 Armadillo)</p>	<p><b>4</b></p> <p><b>Project Financial Management in Facilities Connect</b> 10-11:30am (Norris – 208 Armadillo)</p> <p><b>Open Lab</b> 2-4pm (EV – 2020 Ridge)</p>	<p><b>Open Lab</b> 9-11am (EV – 2020 Ridge)</p> <p><b>4</b></p> <p><b>Project Financial Management in Facilities Connect</b> 2-3:30pm (Norris – 208 Armadillo)</p>	<p><b>Open Lab</b> 2-4pm (EV – 2020 Ridge)</p>	
	17	18	19	20	21	
	3	<p><b>Open Lab</b> 2-4pm (EV – 2020 Ridge)</p>	<p><b>Open Lab</b> 2-4pm (EV – 2020 Ridge)</p>	<p><b>Open Lab</b> 2-4pm (EV – 2020 Ridge)</p>	<p><b>Open Lab</b> 2-4pm (EV – 2020 Ridge)</p>	



# Conclusion

## Feedback and Questions

### FEEDBACK / Q&A

**We would like to hear your feedback on today's course and your questions regarding Facilities Connect**

Your input will help guide our ongoing Facilities Connect training and support efforts

Please send your feedback and questions to [FPMFeedback@northwestern.edu](mailto:FPMFeedback@northwestern.edu)