



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	<b>1.0</b>	Release Date	<b>3/14/2019</b>
Owner	<b>NU Facilities</b>		
Version Notes	<b>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)</b>		

### REVISION HISTORY

	Version	Release Date	Action	Owner
Most Recent →	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



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
    - Note:** 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

Northwestern | FACILITIES CONNECT

Welcome, NU Wildcat | Sign Out | About

Company Project

Home Portfolio

Home

Reminders - Projects

- Notices
- Tasks

Reminders - Manage Space Requests

- 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

My Projects - Phase 2.0 Design

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) Ref
- 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
- Room and Department Base Data Only
- Office Area Capacity
- Overall Total Campus Square Footage
- Space Allocation
- Space Class Count by Building
- Space Report by Building
- Campus Mapping



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 across a user's portfolio of projects
- **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 Project Focus

PROJECT INFORMATION

IMPORTANT

Northwestern | FACILITIES CONNECT

Welcome, NU Wildcat | Sign Out | About

**B** → **Company** **Project**

Home Portfolio

Home

Open In New Window My Bookmarks

Reminders - Projects

- Notices
- Tasks

Reminders - Manage Space Requests

- 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

My Projects - Phase 2.0 Design

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) Ref
- 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
- Room and Department Base Data Only
- Office Area Capacity
- Overall Total Campus Square Footage
- Space Allocation
- Space Class Count by Building
- Space Report by Building
- Campus Mapping



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

**Note:** 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

The screenshot shows the 'Home' screen of the Northwestern Facilities Connect system. The page title is 'Northwestern | FACILITIES CONNECT'. The user is logged in as 'Welcome, NU Wildcat'. There are navigation tabs for 'Home' and 'Portfolio'. The main content area is divided into several portlets:

- Reminders - Projects**: Contains 'Notices' and 'Tasks'.
- Reminders - Manage Space Requests**: Contains 'Requests'.
- Related Links - Projects** (Callout C): A dropdown menu with 'Programs and Funding Sources' (View Programs) and 'Projects' (Create a Capital Project, My Capital Projects, All Capital Projects).
- Project Checklists In Revision** (Callout D): A table with columns: Created By, Project Name, Status, Checklist Type, Comment, Created Date/Time. It shows 'No data to display.'
- My Projects - Phase 0.0 Initial Request** (Callout D): A table with columns: Project Name, Project Status, Plan Complete, Primary Contact, Primary Location. It shows 'No data to display.'
- My Projects - Phase 1.0 Feasibility** (Callout D)
- My Projects - Phase 2.0 Design** (Callout D)
- My Projects - Phase 3.0 Construction Procurement** (Callout D)
- My Projects - Phase 4.0 Construction** (Callout D)
- My Projects - Phase 5.0 Operational** (Callout D)
- My Projects - Phase 6.0 Close-Out** (Callout D)
- Last Visited** (Callout D)
- Project Reports** (Callout E): A list of reports including: 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**: A list of reports including: 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, Room and Department Base Data Only, Office Area Capacity, Overall Total Campus Square Footage, Space Allocation, Space Class Count by Building, Space Report by Building, Campus Mapping.

PROJECT INFORMATION

IMPORTANT



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

Northwestern | FACILITIES CONNECT

Welcome, No Wilco | Sign Out | About

**G** → **Project Data For 1001224-Pete's New Project** **F** **Company** **Project**

**H**

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
1000065	2019 - 05	Week Ending 2/8/2019		\$ .00	\$ .00 Draft

Project Contacts

Role	Person	Work Phone	Email	Primary Organization
Project Director	Director,Doug			
Project Primary Manager	Project Manager,Pam			

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



## GENERAL NAVIGATION

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

- I. 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

## IMPORTANT

Northwestern | FACILITIES CONNECT

Welcome, NU Wildcat | Sign Out | About

Company Project

Home Portfolio

Locations Organizations People

Home > Portfolio

Geography

- Countries
- States
- Cities

Organizations

- Departments
- External Companies
- Workgroups

Specifications

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

Locations

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

People

- Employees
- Consultants
- External Contacts

Assets

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

Open In New Window Add to Bookmarks My Bookmarks



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

**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 chartstring) or Non-Capitalized (i.e. does not have a capital project chartstring)
- **Chartstring (if applicable)** contains the capital chartstring for the project

**IMPORTANT**

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

General Scope Schedule Budget Procurement Contacts Notes & Documents

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

**General** **A**

ID 1001252 Status Revision In Progress

\* Date 05/01/2017

\* Name PR002111 - Abbott 17 Renovation(Converted)

\* Project Reporting Name Abbott 17 Renovation (Converted)

**Details** **B**

Project Type Academic Project Classification Major Renovation

Project Status Active Project Phase 4.2 Construction

Project Website

\* Project Category Capitalized \* Chartstring 812-4600000-80047077-01

Accounting Cost Center 812-4600000-80047077-01 Project Cost/SqFt (Budget Current / Project Gross Construction Area) 5.00 US Dollars

**Units**

**Environmental**

City Chicago

State/Province IL Country USA

**Primary Customer Contact**

Client Lookup Morris,Rick Gene

Address 70 Arts Circle Drive 5th Floor

Zip/Postal Code 60208

City EV

State/Province IL Country

Email r-morris@northwestern.edu Phone 847/491-4262

Department 4600000 Job Title Assoc Dean for Finance & Admin

**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

**▶ IMPORTANT**

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

General Scope Schedule Budget Procurement Contacts Notes & Documents

Activate Calculate Save Save & Close More x

**Primary Customer Contact** C

Client Lookup Morris,Rick Gene

Address 70 Arts Circle Drive 5th Floor

Zip/Postal Code 60208

City EV

State/Province IL Country

Email r-morris@northwestern.edu Phone 847/491-4262

Department 4600000 Job Title Assoc Dean for Finance & Admin

**Primary Location** D

\* Location Path \Locations\Chicago Campus\Abbott Hall\17

Campus Chicago Campus Floor 17

Building Abbott Hall

Primary Location Graphic

Site Address

Project Address

Recorded By

Activate Calculate Save Save & Close More x

**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)

Capital Project: 201252-PR002111 - Abbott 17 Renovation(Converted)

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

(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** **X** **X<sup>2</sup>** **☰** **☷** **☹** **☺** **☻** **☼** **☽** **☾** **☿** **♁** **♂** **♀** **♆** **♇** **♈** **♉** **♊** **♋** **♌** **♍** **♎** **♏** **♐** **♑** **♒** **♓** **♈** **♉** **♊** **♋** **♌** **♍** **♎** **♏** **♐** **♑** **♒** **♓** **HTML** **☰**

Interior build out for multi disciplinary departments within School of Communications; Health Comm, CS+D and Comm Studios. Renovation to include two unassigned faculty offices, small lab for Prof. Sumit (CS+D), small office suite for AJ Christian (Comm Studies) and approx 1000SF of shell space for future Health Comm lab(s).

**Site Information**

Site Gross Area	<input type="text" value="0"/>	acres	Site Usable Area	<input type="text" value="0"/>	acres
Project Gross Construction Area	<input type="text" value="5522.1476"/>	square-feet	Project Usable Construction Area	<input type="text" value="0"/>	square-feet
Impacted Area (Effective)	<input type="text" value="5522.1476"/>	square-feet			
Total Floor Area Ratio	<input type="text" value="0"/>				

**Project Impacted Area**

Select From Floor Plan | Add | Remove

Campus	Building	Floor	Wing	Name	Type	Hierarchy	Area
<input type="checkbox"/>	Chicago Campus	Abbott Hall	17	17	Project Impacted Area	\\Locations\Chicago Campus\Abbott Hall\17	5522.1476 square-feet
							5522.1476 square-feet

**Parking**

Parking Design	<input type="text" value=""/>	Parking Ratio	<input type="text" value="0"/>
Total Parking Spaces	<input type="text" value="0"/>	Covered Parking Space	<input type="text" value="0"/>
Handicap Parking Spaces	<input type="text" value="0"/>		

Activate Calculate Save Save & Close More x

**▶ IMPORTANT**

**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

**▶ IMPORTANT**

Capital Project: 1001252 - 002111 - Abbott 17 Renovation(Converted)

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

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

**Summary** I

Plan Start 04/10/2017 Plan End

Actual Start 04/10/2017 Actual End 01/14/2019

Calculated Start 04/03/2017 Calculated End 02/15/2019

\* Time Zone (GMT -6) Central Time (US, Canada) [US/Central] \* Calculate Project From Start

**Project Tasks Gantt** J

#	ID	Task Name	Planned Start	Planned End	Planned Duration	To	Type	St
0	18932	Phase 0.0 Initial Re	04/03/2017 08:00:00	06/23/2017 17:00:00	11 Weeks 4 Days 9 Hours	480	Schedule T	Draft
0	18932	Phase 2.0 Design	06/26/2017 08:00:00	10/16/2017 16:59:55	16 Weeks 8 Hours	648	Schedule T	Draft
0	18932	Phase 2.3 Contract	10/18/2017 11:42:00	05/16/2018 11:42:00	30 Weeks	1200	Schedule T	Draft
0	18932	Phase 3.1 Bid	05/17/2018 11:42:00	06/14/2018 11:42:00	4 Weeks	160	Schedule T	Draft
0	18932	Phase 4.2 Construct	06/15/2018 08:00:00	12/26/2018 17:00:00	27 Weeks 5 Days 10 Hours	1080	Schedule T	Draft
0	18932	Phase 5.2 Occupied	01/02/2019 08:00:00	01/15/2019 17:00:00	1 Week 6 Days 9 Hours	80	Schedule T	Draft
0	18932	Phase 6.0 Close-Out	01/02/2019 08:00:00	01/31/2019 16:59:55	4 Weeks 1 Day 8 Hours	168	Schedule T	Draft
0	18932	Phase 6.2 FM Close	01/14/2019 08:00:00	01/28/2019 17:00:00	2 Weeks 9 Hours	80	Schedule T	Draft
0	18932	Phase 6.3 Financials	02/01/2019 11:42:00	02/15/2019 11:42:00	2 Weeks	80	Schedule T	Draft

Zoom to month Show Baseline





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

IMPORTANT

Capital Project: 1001252-PR0021\* - Abbott 17 Renovation(Converted)

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

(Optional): Summary of the budget and commitments for the project.

**Summary**

Budget Code Structure: 812-4600000-80047077-01

BUDGET			COMMITMENTS		
a. Original Budget	\$1,800,000.00	US Dollars	d. Commitments	\$1,478,869.57	US Dollars
b. Budget Changes	5.00	US Dollars	e. Invoices Paid	\$1,315,849.87	US Dollars
c. Current Budget (a+b)	\$1,800,000.00	US Dollars	f. Encumbrance Balance (d-e)	\$163,019.70	US Dollars

Last Update: 12/11/2018  
Updated By:

**INCURRED**

e. Invoices Paid	\$1,315,849.87	US Dollars
g. Journals/Job Cost	\$105,789.69	US Dollars
h. Total Incurred (e+g)	\$1,421,639.56	US Dollars

**FORECAST**

i. Allowance for PM Fee (%*f)	\$6,520.79	US Dollars
j. Uncommitted Budget (c-f-h-i)	\$208,819.95	US Dollars

**Job Cost Billing**

PM Markup: 4

**Current Budget Balance**

Account	Account Description	c. Current Budget	f. Encumbrance Balance	h. Total Incurred	j. Uncommitted Budget
73010	Paper And Office Supplies	\$0.00	\$0.00	\$0.00	\$0.00
73075	Computer Supplies	\$0.00	\$0.00	\$0.00	\$0.00
73310	Av Equipment Supplies	\$0.00	\$0.00	\$1,100.56	\$-1,100.56
73475	Lab Supplies and Hardware	\$0.00	\$0.00	\$0.00	\$0.00
73910	Books	\$0.00	\$0.00	\$0.00	\$0.00
75010	Professional & Consulting Svcs	\$0.00	\$0.00	\$0.00	\$0.00
75015	Professional Svcs-Reimbursement	\$0.00	\$0.00	\$0.00	\$0.00
75120	Internal-Printing&Duplicating	\$0.00	\$0.00	\$0.00	\$0.00
75130	External-Printing Services	\$0.00	\$0.00	\$0.00	\$0.00
75140	Internal-Univ Relations Svcs	\$0.00	\$0.00	\$0.00	\$0.00



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

IMPORTANT

Capital Project: 1001252-PR0021\* Abbott 17 Renovation(Converted)

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

(Optional): Summary of the budget and commitments for the project.

**Summary**

Budget Code Structure: 812-4600000-80047077-01

BUDGET			COMMITMENTS		
a. Original Budget	\$1,800,000.00	US Dollars	d. Commitments	\$1,478,869.57	US Dollars
b. Budget Changes	5.00	US Dollars	e. Invoices Paid	\$1,315,849.87	US Dollars
c. Current Budget (a+b)	\$1,800,000.00	US Dollars	f. Encumbrance Balance (d-e)	\$163,019.70	US Dollars
			e. Invoices Paid	\$1,315,849.87	US Dollars
			g. Journals/Job Cost	\$105,789.69	US Dollars
			h. Total Incurred (e+g)	\$1,421,639.56	US Dollars
			i. Allowance for PM Fee (%*f)	\$6,520.79	US Dollars
			j. Uncommitted Budget (c-f-h-i)	\$208,819.95	US Dollars

INCURRED

FORECAST

Last Update: 12/11/2018

Updated By:

**Job Cost Billing**

PM Markup: 4

**Current Budget Balance**

Account	Account Description	c. Current Budget	f. Encumbrance Balance	h. Total Incurred	j. Uncommitted Budget
73010	Paper And Office Supplies	\$0.00	\$0.00	\$0.00	\$0.00
73075	Computer Supplies	\$0.00	\$0.00	\$0.00	\$0.00
73310	Av Equipment Supplies	\$0.00	\$0.00	\$1,100.56	\$-1,100.56
73475	Lab Supplies and Hardware	\$0.00	\$0.00	\$0.00	\$0.00
73910	Books	\$0.00	\$0.00	\$0.00	\$0.00
75010	Professional & Consulting Svcs	\$0.00	\$0.00	\$0.00	\$0.00
75015	Professional Svcs-Reimbursement	\$0.00	\$0.00	\$0.00	\$0.00
75120	Internal-Printing&Duplicating	\$0.00	\$0.00	\$0.00	\$0.00
75130	External-Printing Services	\$0.00	\$0.00	\$0.00	\$0.00
75140	Internal-Univ Relations Svcs	\$0.00	\$0.00	\$0.00	\$0.00

**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

**IMPORTANT**

Capital Project: 1001252-PR0021\* Abbott 17 Renovation(Converted)

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

(Optional): Summary of the budget and commitments for the project.

**Summary**

Budget Code Structure: 812-4600000-80047077-01

BUDGET			COMMITMENTS		
a. Original Budget	\$1,800,000.00	US Dollars	d. Commitments	\$1,478,869.57	US Dollars
b. Budget Changes	5.00	US Dollars	e. Invoices Paid	\$1,315,849.87	US Dollars
c. Current Budget (a+b)	\$1,800,000.00	US Dollars	f. Encumbrance Balance (d-e)	\$163,019.70	US Dollars

  

INCURRED			FORECAST		
e. Invoices Paid	\$1,315,849.87	US Dollars	i. Allowance for PM Fee (%*f)	\$6,520.79	US Dollars
g. Journals/Job Cost	\$105,789.69	US Dollars	j. Uncommitted Budget (c-f-h-i)	\$208,819.95	US Dollars
h. Total Incurred (e+g)	\$1,421,639.56	US Dollars			

Last Update: 12/11/2018  
Updated By:

**Job Cost Billing**

PM Markup: 4

**Current Budget Balance**

Export 82 total found Apply Filters Clear Filters

Account	Account Description	c. Current Budget	f. Encumbrance Balance	h. Total Incurred	j. Uncommitted Budget
73010	Paper And Office Supplies	\$0.00	\$0.00	\$0.00	\$0.00
73075	Computer Supplies	\$0.00	\$0.00	\$0.00	\$0.00
73310	Av Equipment Supplies	\$0.00	\$0.00	\$1,100.56	\$-1,100.56
73475	Lab Supplies and Hardware	\$0.00	\$0.00	\$0.00	\$0.00
73910	Books	\$0.00	\$0.00	\$0.00	\$0.00
75010	Professional & Consulting Svcs	\$0.00	\$0.00	\$0.00	\$0.00
75015	Professional Svcs-Reimbursement	\$0.00	\$0.00	\$0.00	\$0.00
75120	Internal-Printing&Duplicating	\$0.00	\$0.00	\$0.00	\$0.00
75130	External-Printing Services	\$0.00	\$0.00	\$0.00	\$0.00
75140	Internal-Univ Relations Svcs	\$0.00	\$0.00	\$0.00	\$0.00



**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

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

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

**IMPORTANT**

Capital Project: 1001252-PR00214 - Abbott 17 Renovation(Converted)

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

Activate Calculate Save Save & Close More x

### Current Budget Balance

Export 82 total found Apply Filters Clear Filters

Account	Account Description	c. Current Budget	f. Encumbrance Balance	h. Total Incurred	j. Uncommitted Budget
75820	Construction Costs	\$1,250,000.00	\$141,450.36	\$1,076,209.64	\$32,340.00
75899	Contingency	\$120,000.00	\$0.00	\$0.00	\$120,000.00
75844	Movable Equipment-Non Capital	\$100,000.00	\$0.00	\$0.00	\$100,000.00
75805	Architect and Engineer Fees & Reimbursable	\$80,000.00	\$3,164.90	\$134,550.10	\$-57,715.00
75841	Furniture-Capital	\$80,000.00	\$11,887.09	\$61,249.26	\$6,863.65
75882	Construction Coordination Fees	\$70,000.00	\$0.00	\$52,589.98	\$17,410.02
75853	FMO Charges	\$50,000.00	\$0.00	\$35,767.71	\$14,232.29
75825	Demolition, Abatement	\$23,000.00	\$0.00	\$27,180.00	\$-4,180.00
75828	Owner's Contract Work	\$10,000.00	\$0.00	\$0.00	\$10,000.00
75855	Tele-Data & IT Charges	\$10,000.00	\$0.00	\$0.00	\$10,000.00

### Cost Overview

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### Project Budget

Export 1 total found Show: 10

ID	Type	Date	Name	Amount	Status
1000732	Project Original Budget	11/27/2018	812-4600000-80047077-01	\$1,800,000.00	Issued

Activate Calculate Save Save & Close More x

**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

**IMPORTANT**

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

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

Contracts and Purchase Orders

1 / 2 14 total found Show: 10

Vendor Company Name	ID	Type	Date	PO Amount	Total Invoice
HENRICKSEN & CO	PUR1316173	Purchase Order	11/28/2018	\$61,249.26	\$61,249.26
FASTSIGNS-CHICAGO	PUR1365612	Purchase Order	11/28/2018	\$1,994.33	\$1,994.33
CELTIC ENVIRONMENTAL COMPANY	PUR1326742	Purchase Order	11/28/2018	\$3,300.00	\$3,300.00
AVI SYSTEMS	PUR1351161	Purchase Order	11/28/2018	\$1,100.56	\$1,100.56
FASTSIGNS-CHICAGO	PUR1337259	Purchase Order	11/28/2018	\$1,994.33	\$5.00
CARNOW CONIBEAR & ASSOC	PUR1237461	Purchase Order	11/28/2018	\$2,100.00	\$2,100.00
CEPRO, INC	PUR1297633	Purchase Order	11/28/2018	\$1,250.00	\$1,198.10
EHC INDUSTRIES, INC	PUR1294664	Purchase Order	11/28/2018	\$23,880.00	\$23,880.00
HENRICKSEN & CO	PUR1377777	Purchase Order	11/28/2018	\$11,887.09	\$5.00
ABT ELECTRONICS & APPLIANCE CO	PUR1368320	Purchase Order	11/01/2018	\$1,189.00	\$1,189.00

Billing

1 / 13 122 total found Show: 10

ID	Type	Date	Name	Status
NWUNV-FM00572492-127	Payment Release	02/20/2019	FM00572492-127	Completed
FM00572492-127-2019-02-19	Journal Invoice	02/20/2019	JOURNAL FM00572492-127	Completed
NWUNV-FM00571670-164	Payment Release	02/13/2019	FM00571670-164	Completed
NWUNV-FM00571670-107	Payment Release	02/13/2019	FM00571670-107	Completed
FM00571670-164-2019-02-12	Journal Invoice	02/13/2019	JOURNAL FM00571670-164	Completed
FM00571670-107-2019-02-12	Journal Invoice	02/13/2019	JOURNAL FM00571670-107	Completed
FM00562515-46-30-NOV-18	Journal Invoice	02/07/2019	JOURNAL FM00562515-46	Completed
FM00564010-35-11-DEC-18	Journal Invoice	02/07/2019	JOURNAL FM00564010-35	Completed
FM00564976-176-18-DEC-18	Journal Invoice	02/07/2019	JOURNAL FM00564976-176	Completed
FM00564976-77-18-DEC-18	Journal Invoice	02/07/2019	JOURNAL FM00564976-77	Completed

**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

**IMPORTANT**

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

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

Contracts and Purchase Orders

1 / 2 Export 14 total found Apply Filters Clear Filters Show: 10

Vendor Company Name	ID	Type	Date	PO Amount	Total Invoice
HENRICKSEN & CO	PUR1316173	Purchase Order	11/28/2018	\$61,249.26	\$61,249.26
FASTSIGNS-CHICAGO	PUR1365612	Purchase Order	11/28/2018	\$1,994.33	\$1,994.33
CELTIC ENVIRONMENTAL COMPANY	PUR1326742	Purchase Order	11/28/2018	\$3,300.00	\$3,300.00
AVI SYSTEMS	PUR1351161	Purchase Order	11/28/2018	\$1,100.56	\$1,100.56
FASTSIGNS-CHICAGO	PUR1337259	Purchase Order	11/28/2018	\$1,994.33	\$5.00
CARNOW CONIBEAR & ASSOC	PUR1237461	Purchase Order	11/28/2018	\$2,100.00	\$2,100.00
CEPRO, INC	PUR1297633	Purchase Order	11/28/2018	\$1,250.00	\$1,198.10
EHC INDUSTRIES, INC	PUR1294664	Purchase Order	11/28/2018	\$23,880.00	\$23,880.00
HENRICKSEN & CO	PUR1377777	Purchase Order	11/28/2018	\$11,887.09	\$5.00
ABT ELECTRONICS & APPLIANCE CO	PUR1368320	Purchase Order	11/01/2018	\$1,189.00	\$1,189.00

Billing

1 / 13 Export 122 total found Apply Filters Clear Filters Show: 10

ID	Type	Date	Name	Status
NWUNV-FM00572492-127	Payment Release	02/20/2019	FM00572492-127	Completed
FM00572492-127-2019-02-19	Journal Invoice	02/20/2019	JOURNAL FM00572492-127	Completed
NWUNV-FM00571670-164	Payment Release	02/13/2019	FM00571670-164	Completed
NWUNV-FM00571670-107	Payment Release	02/13/2019	FM00571670-107	Completed
FM00571670-164-2019-02-12	Journal Invoice	02/13/2019	JOURNAL FM00571670-164	Completed
FM00571670-107-2019-02-12	Journal Invoice	02/13/2019	JOURNAL FM00571670-107	Completed
FM00562515-46-30-NOV-18	Journal Invoice	02/07/2019	JOURNAL FM00562515-46	Completed
FM00564010-35-11-DEC-18	Journal Invoice	02/07/2019	JOURNAL FM00564010-35	Completed
FM00564976-176-18-DEC-18	Journal Invoice	02/07/2019	JOURNAL FM00564976-176	Completed
FM00564976-77-18-DEC-18	Journal Invoice	02/07/2019	JOURNAL FM00564976-77	Completed

Activate Calculate Save Save & Close More x

**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
- Note:** You may click on any invoice or payment release line item in the table to view additional details

**IMPORTANT**

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

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

Contracts and Purchase Orders

1 / 2 Export 14 total found Apply Filters Clear Filters Show: 10

Vendor Company Name	ID	Type	Date	PO Amount	Total Invoice
<a href="#">Contains</a>	<a href="#">Contains</a>	<a href="#">Contains</a>	<a href="#">More Than or Equals</a>	<a href="#">Equals</a>	<a href="#">Equals</a>
HENRICKSEN & CO	PUR1316173	Purchase Order	11/28/2018	\$61,249.26	\$61,249.26
FASTSIGNS-CHICAGO	PUR1365612	Purchase Order	11/28/2018	\$1,994.33	\$1,994.33
CELTIC ENVIRONMENTAL COMPANY	PUR1326742	Purchase Order	11/28/2018	\$3,300.00	\$3,300.00
AVI SYSTEMS	PUR1351161	Purchase Order	11/28/2018	\$1,100.56	\$1,100.56
FASTSIGNS-CHICAGO	PUR1337259	Purchase Order	11/28/2018	\$1,994.33	\$5.00
CARNOW CONIBEAR & ASSOC	PUR1237461	Purchase Order	11/28/2018	\$2,100.00	\$2,100.00
CEPRO, INC	PUR1297633	Purchase Order	11/28/2018	\$1,250.00	\$1,198.10
EHC INDUSTRIES, INC	PUR1294664	Purchase Order	11/28/2018	\$23,880.00	\$23,880.00
HENRICKSEN & CO	PUR1377777	Purchase Order	11/28/2018	\$11,887.09	\$5.00
ABT ELECTRONICS & APPLIANCE CO	PUR1368320	Purchase Order	11/01/2018	\$1,189.00	\$1,189.00

Billing

1 / 13 Export 122 total found Apply Filters Clear Filters Show: 10

ID	Type	Date	Name	Status
<a href="#">Contains</a>	<a href="#">Contains</a>	<a href="#">More Than or Equals</a>	<a href="#">Contains</a>	<a href="#">Contains</a>
NWUNV-FM00572492-127	Payment Release	02/20/2019	FM00572492-127	Completed
FM00572492-127-2019-02-19	Journal Invoice	02/20/2019	JOURNAL FM00572492-127	Completed
NWUNV-FM00571670-164	Payment Release	02/13/2019	FM00571670-164	Completed
NWUNV-FM00571670-107	Payment Release	02/13/2019	FM00571670-107	Completed
FM00571670-164-2019-02-12	Journal Invoice	02/13/2019	JOURNAL FM00571670-164	Completed
FM00571670-107-2019-02-12	Journal Invoice	02/13/2019	JOURNAL FM00571670-107	Completed
FM00562515-46-30-NOV-18	Journal Invoice	02/07/2019	JOURNAL FM00562515-46	Completed
FM00564010-35-11-DEC-18	Journal Invoice	02/07/2019	JOURNAL FM00564010-35	Completed
FM00564976-176-18-DEC-18	Journal Invoice	02/07/2019	JOURNAL FM00564976-176	Completed
FM00564976-77-18-DEC-18	Journal Invoice	02/07/2019	JOURNAL FM00564976-77	Completed

Activate Calculate Save Save & Close More x

**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

**▶ IMPORTANT**

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

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

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

**Contacts** W Add Person Remove

Export 3 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	Stone, David B	847/467-6160		david.stone@northwestern.edu	1830100
<input type="checkbox"/>	Project Primary Manager	Ohrmundt, Andrea Marie	847/467-1766		andrea.ohrmundt@northwestern.edu	1830100
<input type="checkbox"/>	Vendor	Harrell, Chad	312-645-0011			GRISKELIS YOUNG HARRELL

**Contacts Description** X

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**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 all user roles 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.

**▶ IMPORTANT**

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

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

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

**Comments** Add Remove

0 total found Show: 20

<input type="checkbox"/>	! Comment Type	Created By	Reference Date	Comment
No data to display				

**Related Documents** Find Remove Upload

0 total found Show: 20

<input type="checkbox"/>	! Document Name	Document Description
No data to display		

**Progress Reports** Find Remove

0 total found Show: 10

<input type="checkbox"/>	! ID	Date	Title	Status
No data to display				

Activate Calculate Save Save & Close More x