PROJECT MANAGEMENT



# **Creating a New Project**



# CREATING A NEW PROJECT

# **DOCUMENT SUMMARY**

This job guide provides step-by-step instruction for creating a new project in Facilities Connect. The Financial administrator will create the new project record, then send it to the Project Manger to complete the details.

The purpose of this document is to serve as guided reference and/or new hire training on creating a new project, available to all applicable users in Facilities Connect.

# **VERSION INFORMATION (THIS DOCUMENT)**

Version 1.4 Release Date 12/03/2024

Owner **NU Facilities** 

Version The updated version of the document reflects the changes made to the Project Creation process in conjunction with Capital Projects and Finance

departments.

# **REVISION HISTORY**

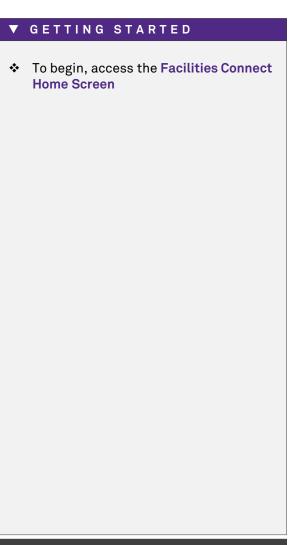
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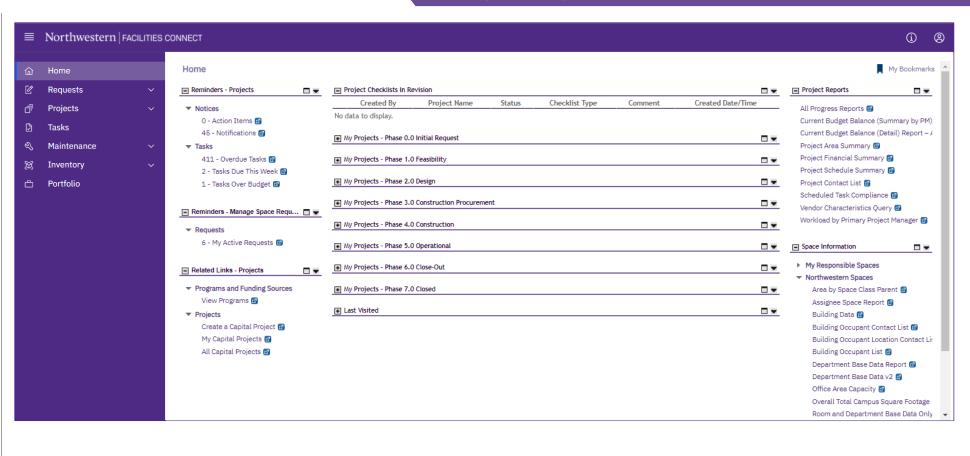
| Version | Release Date | Action  | Owner         |
|---------|--------------|---------|---------------|
| 1.4     | 12/03/2024   | Updated | NU Facilities |
| 1.3     | 09/18/2024   | Updated | NU Facilities |
| 1.2     | 07/15/2022   | Updated | NU Facilities |
| 1.1     | 03/04/2022   | Updated | NU Facilities |
| 1.0     | 02/13/2019   | Created | NU Facilities |



NOW VIEWING

HOME SCREEN (COMPANY FOCUS)





▶ PROCESS



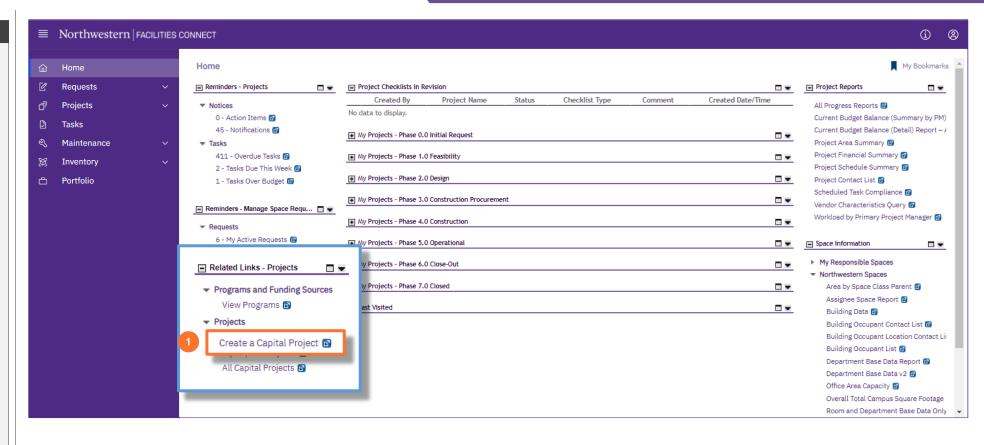
NOW VIEWING

HOME SCREEN (COMPANY FOCUS)

# **▼** PROCESS

 To begin a new project, locate the Related Links - Projects portlet (left side of screen) and click on Create a Capital Project.

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





# **▼** PROCESS

- Begin on the General tab of the Capital Project Form.
  - Create a project name by completing the Name field; the Project Reporting Name field (also a required field) will auto-populate with your Name field entry

Note: All projects must be named using proper project naming conventions. Please refer to the Project Naming Conventions guide on the Facilities Connect website for guidance and more details.

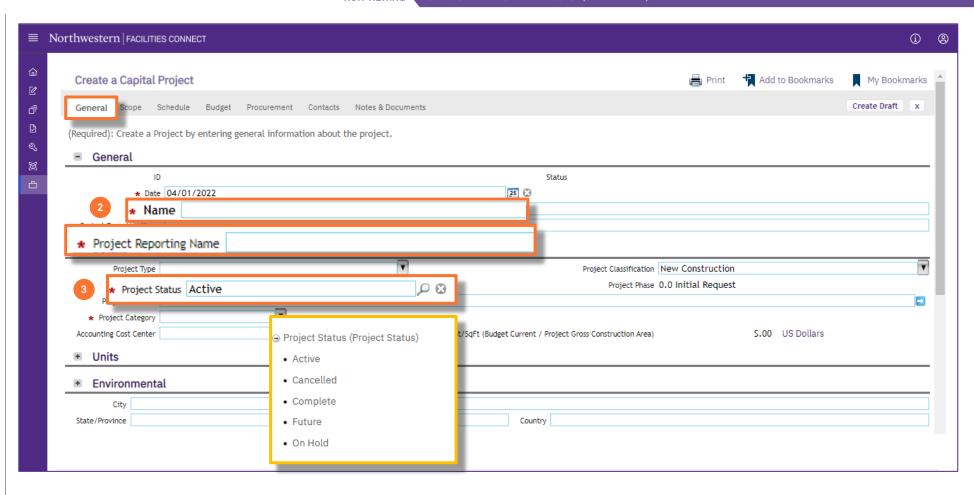
 Select the appropriate Project Status; use the magnifying glass to select Active.

# ► TIPS + TRICKS

The **Date** field will pre-populate with the current date but can be changed by directly editing the date in the associated content box or by clicking on the calendar icon (immediately to the right).

# **▼** IMPORTANT

The **Project Reporting Name** must match the name in the **Chartstring confirmation email** from the Budget office. If these names do not match, the financials will not match.





# ▼ PROCESS

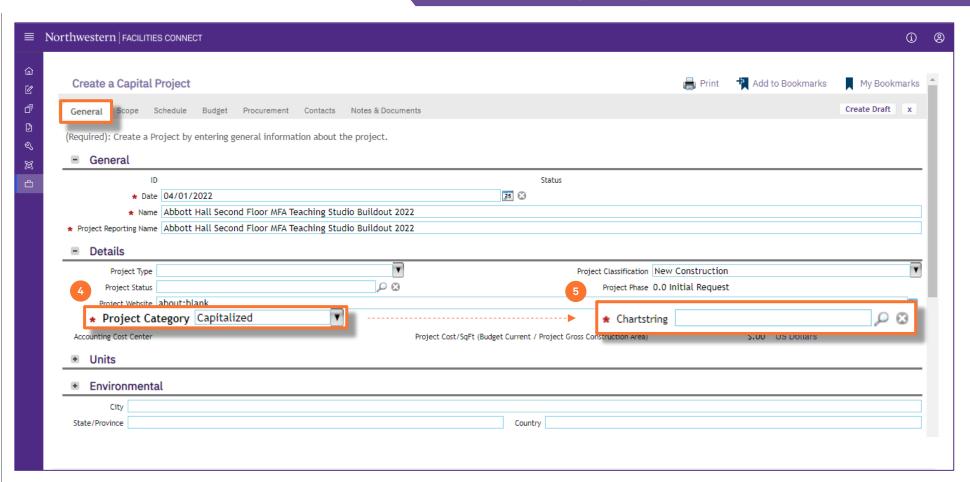
- 4) Select the appropriate **Project**Category; use the dropdown arrow to select either Capitalized or Non-Capitalized.
- 5) If Capitalized is selected for Project Category, the Chartstring field will appear on the right side of the screen.

<u>Note</u>: All Capitalized projects require entry of a project chartstring in order to setup a new project. If you do not have a project chartstring at this time, consult with a **Project Director** on appropriate next steps.

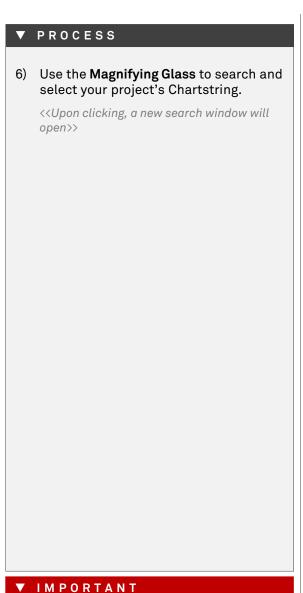
# **▼** IMPORTANT

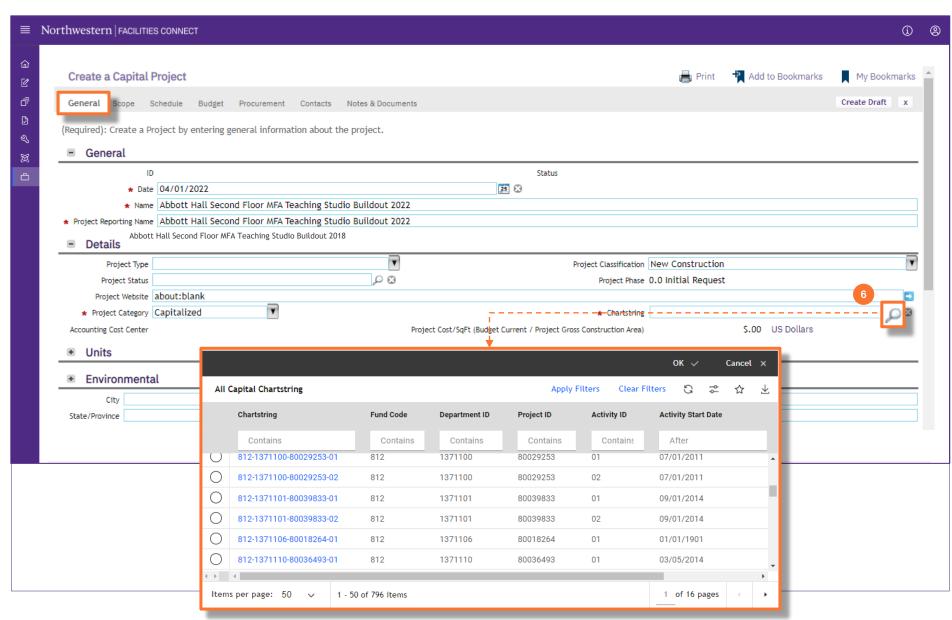
All projects must comply with <u>approved</u>
 <u>Naming Conventions</u>; please refer to the

 <u>Project Naming Conventions</u> guide on the
 Facilities Connect website for more details

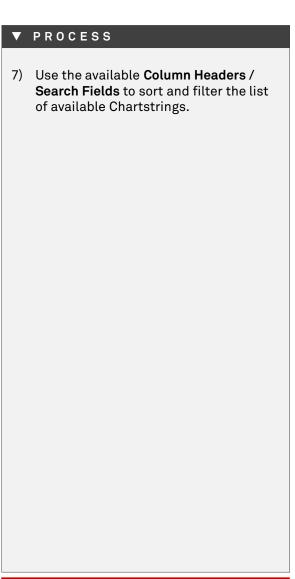


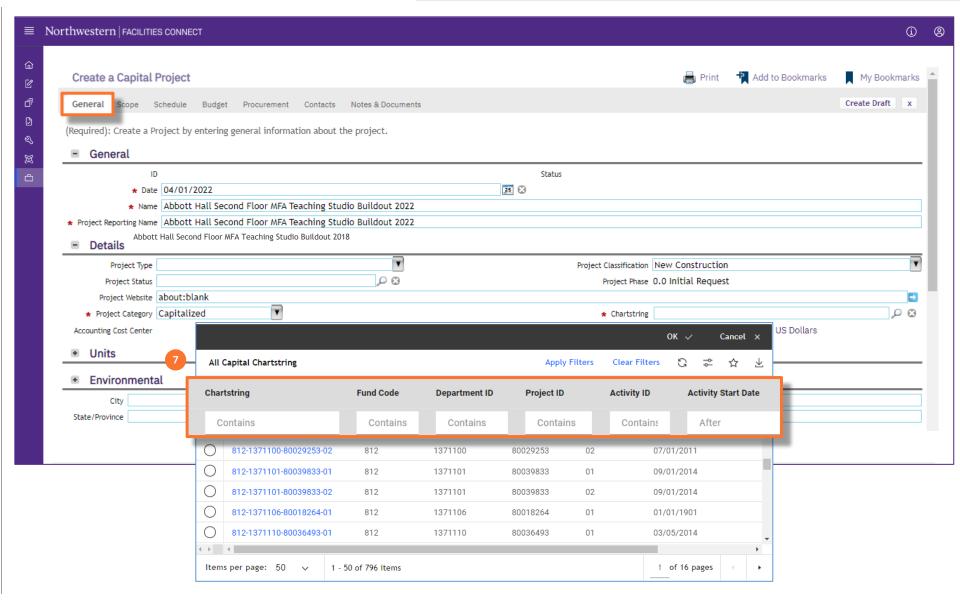








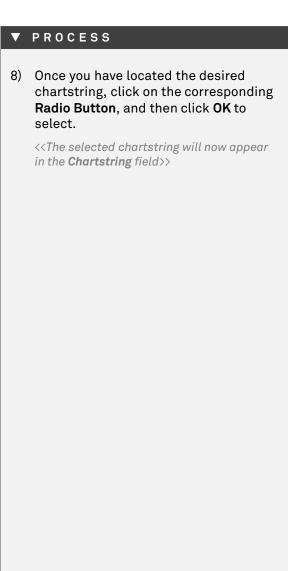


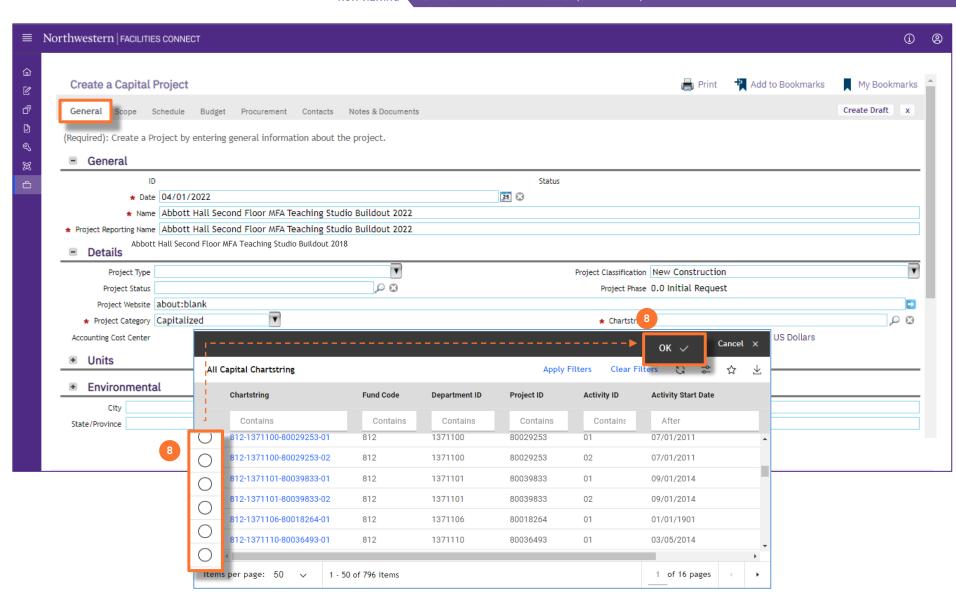




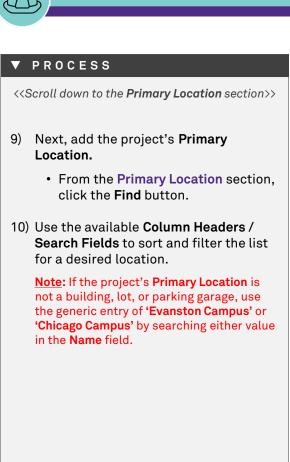
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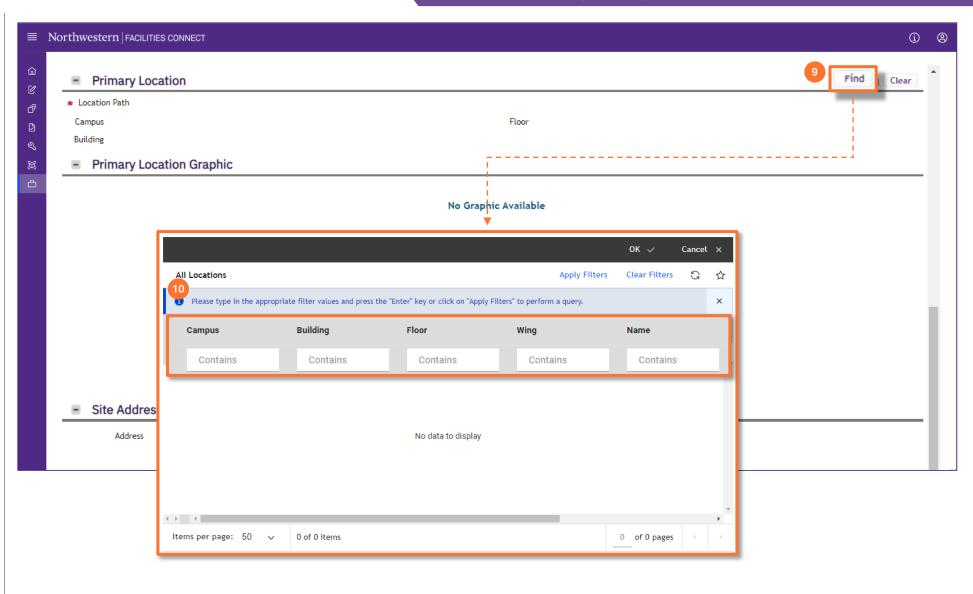
HOME > CREATE A CAPITAL PROJECT (GENERAL TAB)









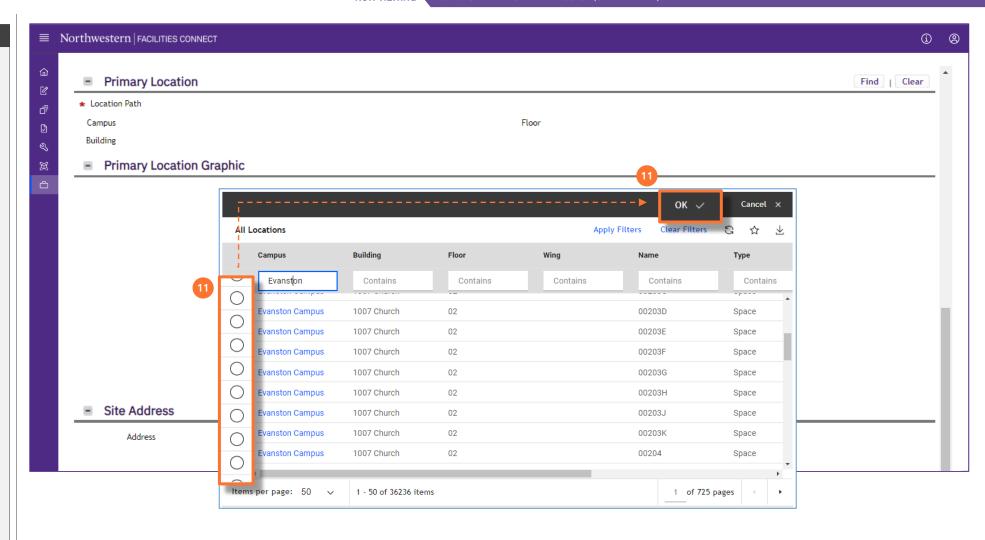




# ▼ PROCESS

11) Once you have located the desired location, click on the corresponding **Radio Button**, and then click **OK** to select.

Note: Once the Primary Location has been selected, the Site Address and Project Address sections will populate automatically.

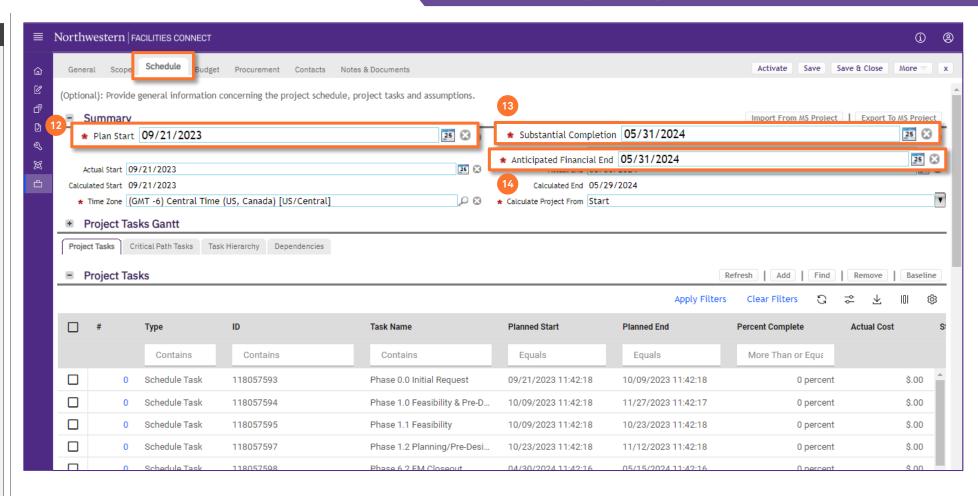




# **▼** PROCESS

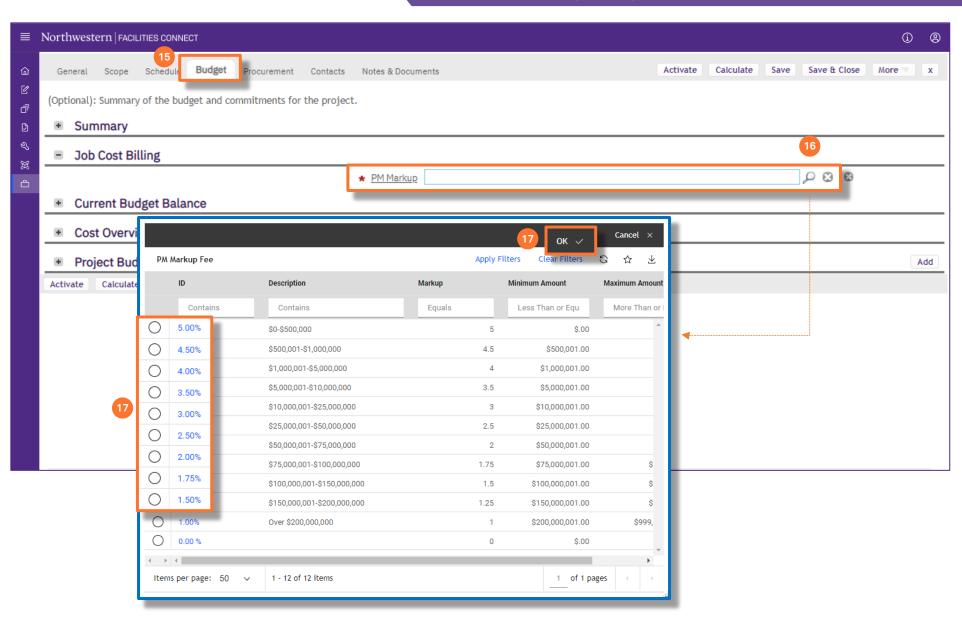
From the **Schedule** tab, use the calendar icon to enter the following dates,

- 12) Edit the **Plan Start** date, which represents the initiation of the project.
- 13) Edit the **Substantial Completion** date, which represents the date construction is to be completed.
- 14) Edit the Anticipated Financial End date, which represents the when all financial transactions should be completed and processed for the project.





# **▼** PROCESS 15) Next, add the PM Mark Up Fee. • To locate this portion of the form, click on the Budget tab. 16) In the Job Cost Billing section, locate the PM Markup field. · Click on the magnifying glass. <<Upon clicking, the PM Markup Fee options will open in a sub-window>> 17) In the **PM Markup** window, click the radio button that matches your budget. • Click on OK to save your selection.





# **▼** PROCESS

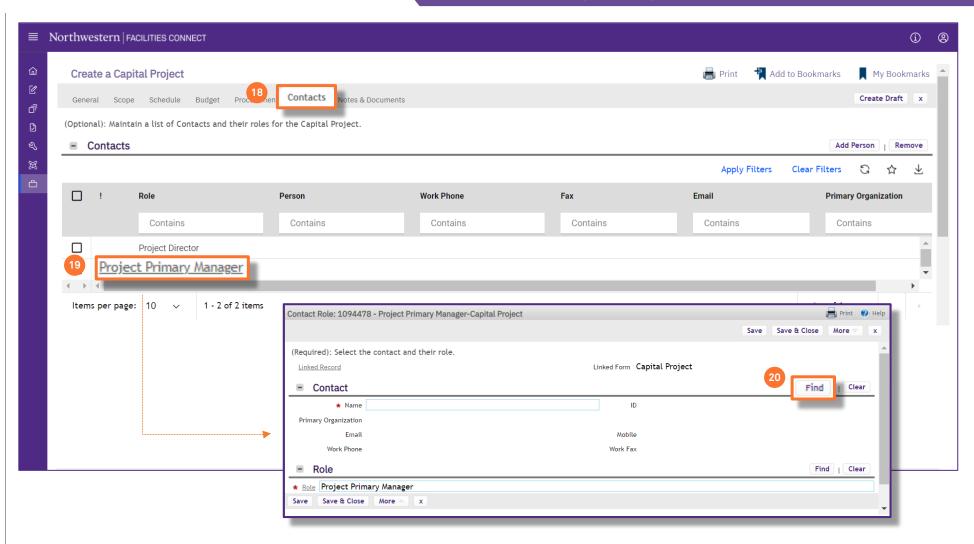
- 18) Next, add the **Project Primary Manager** and **Project Director** responsible for the project.
  - To locate this portion of the form, click on the Contacts tab.
- 19) In the **Contacts** section under **Role**, click on **Project Primary Manager**.

<<Upon clicking, the Contact Role Detail for
the Project Primary Manager will open as a
new window>>

20) In the Contact Role Detail window, click the Find button.

<<Upon clicking, a new search window will open>>

# **▼** IMPORTANT

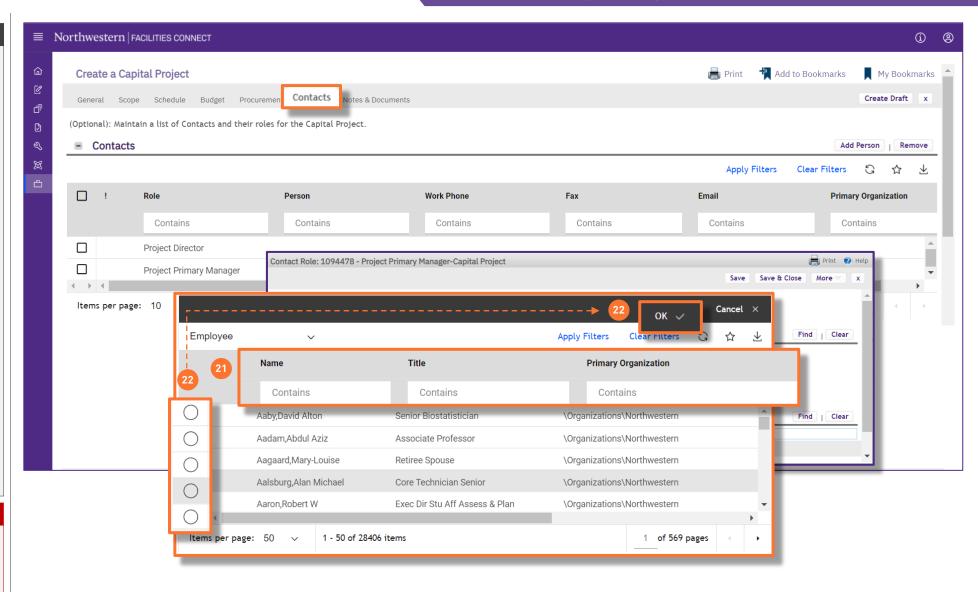




# **▼** PROCESS

- 21) Use the available Column Headers /
  Search Fields to sort and filter the list
  of contacts to locate the desired
  project manager
- 22) Once you have located the desired project manager, click on the corresponding **Radio Button**, and then click **OK** to select

# **▼** IMPORTANT

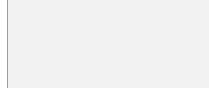




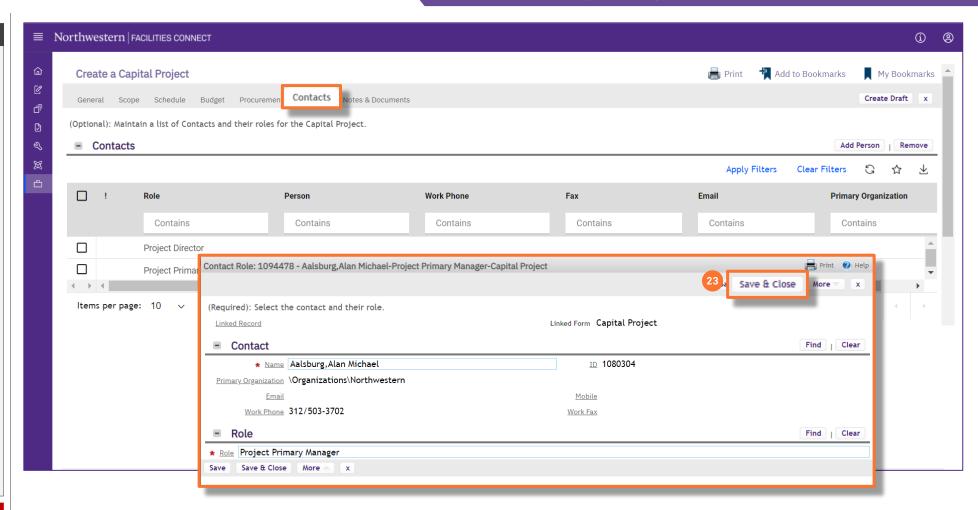
# **▼** PROCESS

The selected contact and his/her information will now appear in the **Contact** section of the **Contact Role Detail** window,

23) Click on the Save & Close button to confirm the selection; the selected contact will now be displayed beside Project Primary Manager in the Contacts section of the Contacts tab.



# **▼** IMPORTANT

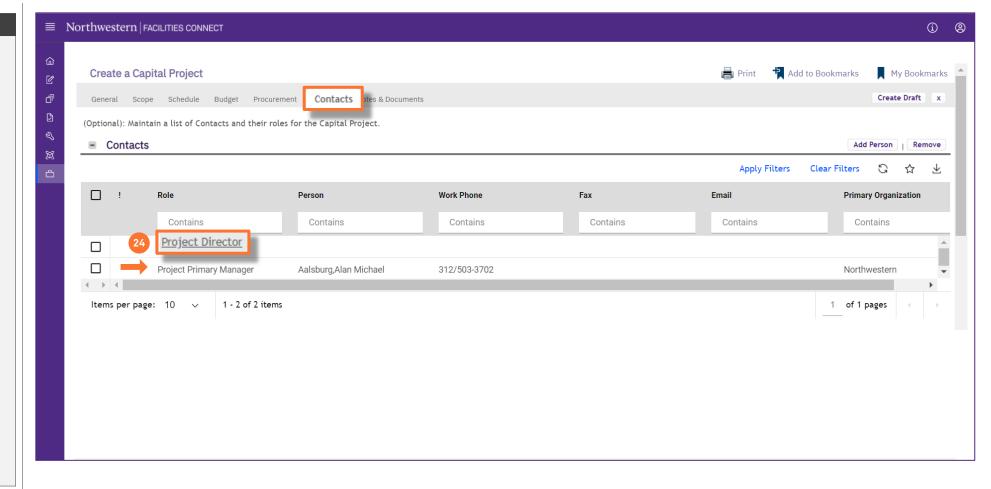




# **▼** PROCESS

The selected **Project Primary Manager** is now displayed for that role in the **Contacts** section of the **Contacts** tab,

24) Next, repeat steps #12-16 to add a contact to the **Project Director** role.



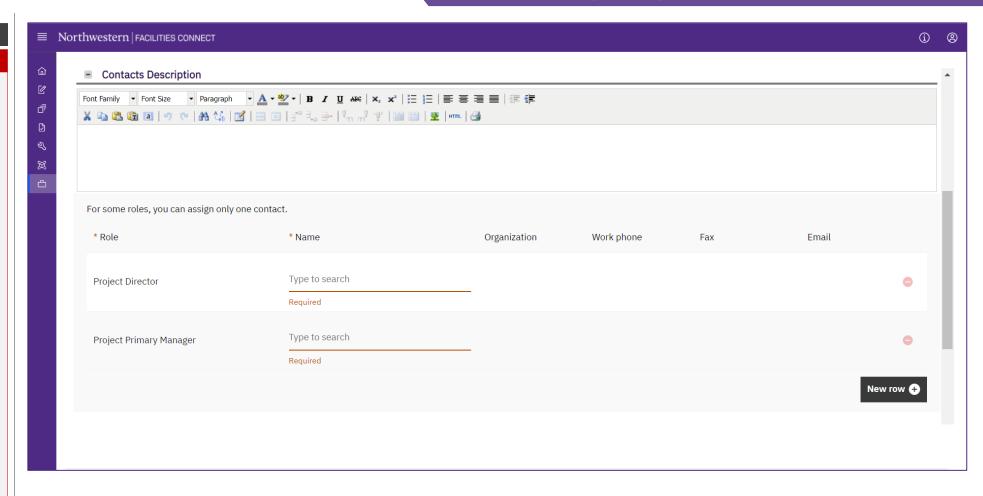
# **▼** IMPORTANT



▼ PROCESS

# **▼** IMPORTANT

For additional information about adding contacts to projects using the Contacts Quick Add function, please refer to the Contacts Quick Add job guides.





# ▼ PROCESS

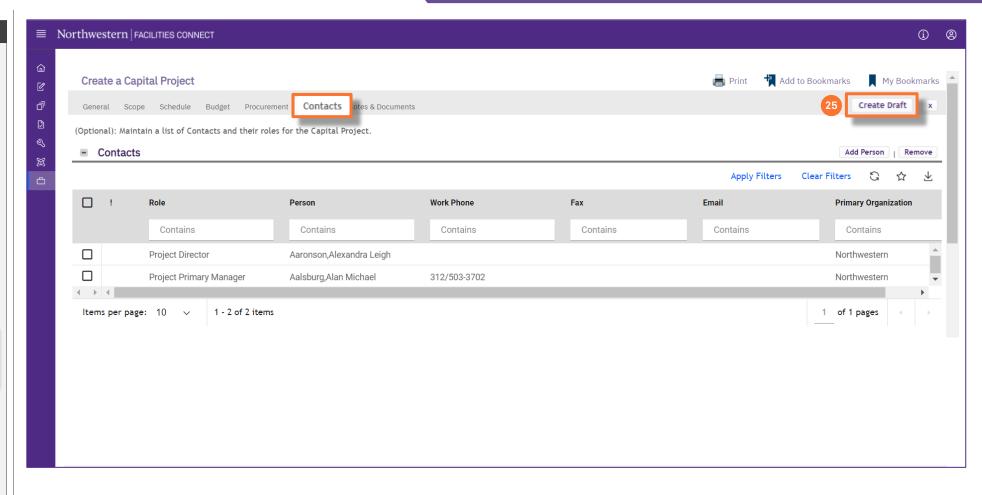
Now that both of the required contacts have been added, you are now able to create a draft of the project,

25) Locate and click the **Create Draft** button on the upper right of the form.

<<Upon clicking, a draft of the project will be
saved, and the action buttons (upper right of
the form) will change to new options>>

<u>Note</u>: An important, final requirement of new project setup in Facilities Connect is application of a **Project Template**.

Please continue with the steps #19-22 to ensure a Project Template is properly applied to your project.





NOW VIEWING HOME > CREATE A CAPITAL PROJECT

# **▼** PROCESS

To apply a **Project Template:** 

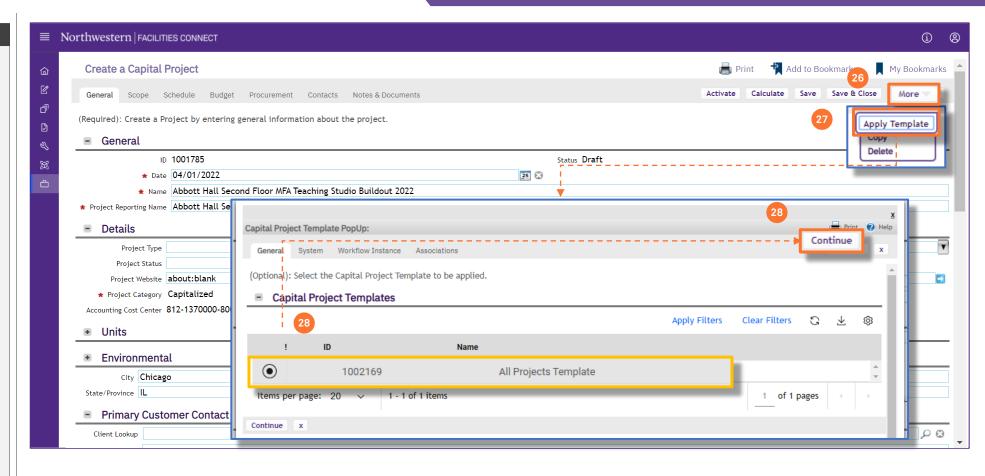
- 26) From the action buttons (upper right of the form), click on the **More** button.
- 27) Next, click on the **Apply Template** option (will appear beneath the **More** button).

<<Upon clicking, a new search window will open>>

- 28) Select All Project Templates,
  - Click on the Radio Button for the template.
  - Click the **Continue** button to confirm the selection.

# IMPORTANT

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





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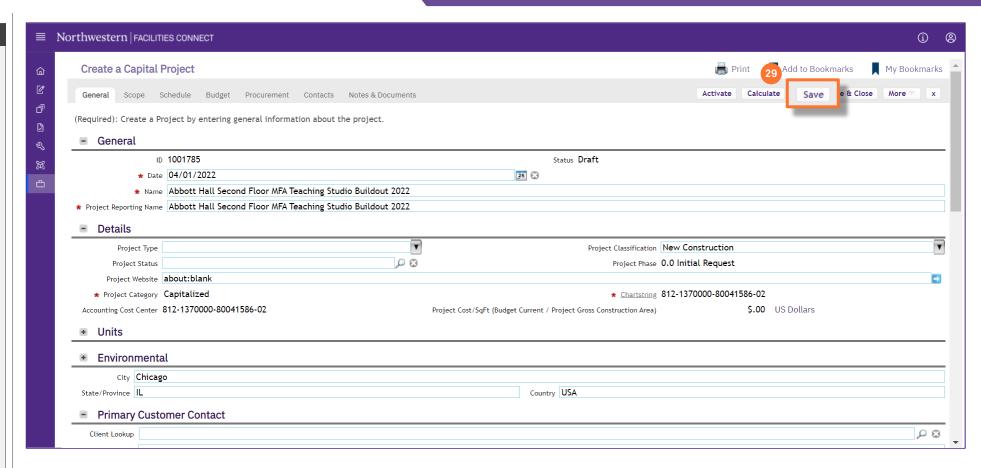
HOME > CREATE A CAPITAL PROJECT

# **▼** PROCESS

29) Click on the **Save** button to save your project with the applied project template.



**DO NOT** Activate the Project. The Project Manger must add their information to the project record before it can be activated.



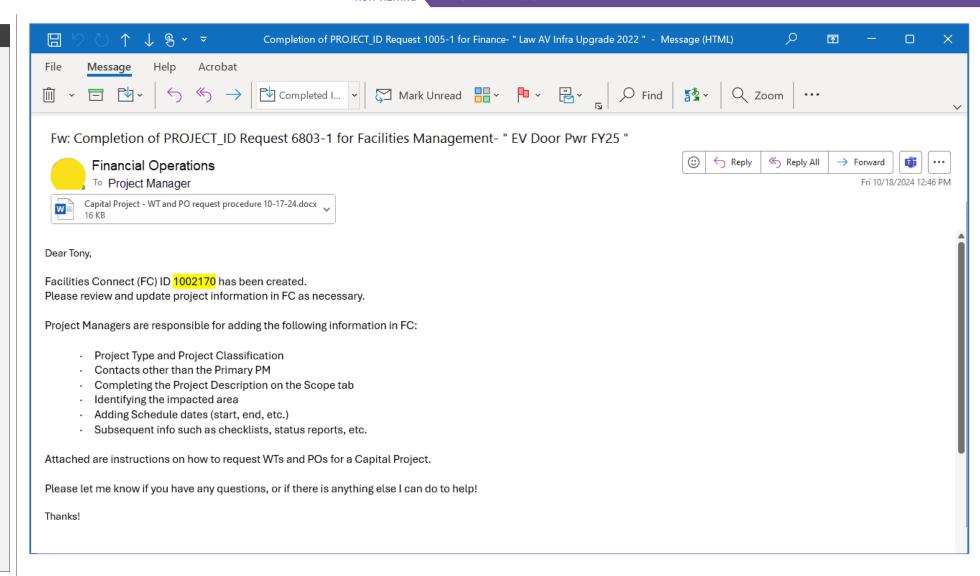


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FINANCIAL OPERATIONS EMAIL

#### ▼ PROCESS

30) Finally, send the Project Manger an email with the **Project ID** number and instructions on what information they need to enter.





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HOME SCREEN (COMPANY FOCUS)

# **▼** PROCESS

The saved project is accessible to the PM directly from the Facilities Connect Home Screen via:

- The 'My Projects' Phase portlets (located at the center of the screen), or
- The My Capital Projects menu (located on the left side of screen).

