



# Complete a New Project Record



# COMPLETE A NEW PROJECT RECORD

## DOCUMENT SUMMARY

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

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

## VERSION INFORMATION (THIS DOCUMENT)

Version **1.3** Release Date **09/18/2024**

Owner **NU Facilities**

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

## REVISION HISTORY

	Version	Release Date	Action	Owner
Most Recent →	1.3	09/18/2024	Updated	NU Facilities
	1.2	0715/2022	Updated	NU Facilities
	1.1	03/04/2022	Updated	NU Facilities
	1.0	02/13/2019	Created	NU Facilities
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GETTING STARTED

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

PROCESS

IMPORTANT

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

File Message Help Acrobat

Completed I... Mark Unread Find Zoom

### Completion of PROJECT\_ID Request 1005-1 for Finance- " Law AV Infra Upgrade 2022 "

**NUFinancials**  
To Project Manager

Thu 7/14/2022 2:59 PM

Dear Colleague,

The PROJECT\_ID value 80062260 has been assigned by NUFinancials for Law AV Infra Upgrade 2022

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

Based upon information provided for PROJECT\_ID Request 1005 for 80062260

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

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

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

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

Thank you.

Manager, Accounting Services  
Financial Operations  
Northwestern University



PROCESS

- 1) Once a Capital Project has been created in **Facilities Connect**,
  - Finance will send you a confirmation email with the new **Project ID number**.
- 2) Project managers are responsible for completing the following information in Facilities Connect,
  - Project Type and Project Classification
  - Contacts other than the Primary PM
  - Completing the Project Description on the Scope tab
  - Identifying the impacted area
  - Adding Schedule dates (start, end, etc.)
  - Subsequent info such as checklists, status reports, etc.

IMPORTANT

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

The screenshot shows an Outlook email window with the following content:

- Subject:** FW: Completion of PROJECT\_ID Request 1005-1 for Finance- " Law AV Infra Upgrade 2022 " - Message (HTML)
- From:** Facilities Finance (Project Manager)
- Date:** Thu 7/14/2022 3:33 PM
- Attachment:** Capital Project - WT and PO request procedure 07-01-20.docx (22 KB)
- Body:**

Hi Project Manager,

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

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

Please let me know if you have any questions.

Manager, Financial Administration  
Facilities | Finance & Administration  
Northwestern University



## PROCESS

To complete the Project Record, log into **Facilities Connect**,

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

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

## IMPORTANT

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

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Home

Reminders - Projects

Project Checklists In Revision

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	P
Law AV Infra Upgrade 2022			

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

My Projects - Phase 1.0 Feasibility

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

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

Project Reports

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

Space Information

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



PROCESS

From the **Project Record** screen,

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

Capital Project: 1001814-Law AV Infra Upgrade 2022

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

Activate Calculate Save Save & Close More x

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

**General**

ID 1001814 Status Draft

Date 07/08/2022

Name Law AV Infra Upgrade 2022

Project Reporting Name Law AV Infra Upgrade 2022

**Details**

4 Project Type [dropdown arrow]

Project Classification [dropdown arrow]

Project Phase 0.0 Initial Request

Project Category Academic

Chartstring 812-5500000-80062260-01

5 [dropdown menu with options: Administrative, Athletics/Recreation, Housing]

City Chicago

State/Province IL Country USA

**Primary Customer Contact**

Client Lookup [input field]

Address [input field]

Zip/Postal Code [input field]

City [input field]

IMPORTANT



PROCESS

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

Capital Project: 1001814-Law AV Infra Upgrade 2022

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

Activate Calculate Save Save & Close More x

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

**General**

ID 1001814 Status Draft

\* Date 07/08/2022

\* Name Law AV Infra Upgrade 2022

\* Project Reporting Name Law AV Infra Upgrade 2022

**Details**

Project Type Academic

Project Status Active

Project Website Abbott Hall Second Floor MFA Teaching Studio Buildout 2018

\* Project Category Capitalized

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

**Units**

**Environmental**

City Chicago

State/Province IL Country USA

**Primary Customer Contact**

Client Lookup

Address

Zip/Postal Code

City

Project Classification dropdown menu:

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

IMPORTANT



PROCESS

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

- Click the **Contact** tab

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

IMPORTANT

Capital Project: 1001814-Law AV Infra Upgrade 2022

8 **Contacts**

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

Activate Calculate Save Save & Close More

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

**General**

ID 1001814 Status Draft

\* Date 07/08/2022

\* Name Law AV Infra Upgrade 2022

\* Project Reporting Name Law AV Infra Upgrade 2022

**Details**

Project Type Academic Project Classification Systems Replacement

Project Status Active Project Phase 0.0 Initial Request

Project Website

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

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

**Units**

**Environmental**

City Chicago

State/Province IL Country USA

**Primary Customer Contact**

Client Lookup

Address

Zip/Postal Code

City



**PROCESS**

- Click the **Add Person** button  
 <<Upon clicking, the **Contact Search** pop-up will open>>
- Use the drop-down menu to select the **External Contacts**
- Use the available **Column Headers / Search Fields** to sort and filter the list of contacts to locate the desired contact
- Once you have located the desired contact, click on the corresponding **check boxes**
- Click **OK** to select

**IMPORTANT**

For additional information about adding contacts to projects, please refer to the [Manage External Contacts](#) OR [Contacts Quick Add](#) job guides.

Capital Project: 1001814-Law AV Infra Upgrade 2022

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

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

**Contacts** **Add Person** Remove

Apply Filters Clear Filters

**Role** Contains

**External Contact** OK Cancel

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

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PROCESS

IMPORTANT

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

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### Contacts Description

Rich text editor toolbar with options for font family, size, paragraph, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, undo, redo, and HTML export.

For some roles, you can assign only one contact.

* Role	* Name	Organization	Work phone	Fax	Email
Project Director	<input type="text" value="Type to search"/>				
	Required				-
Project Primary Manager	<input type="text" value="Type to search"/>				
	Required				-

New row +





PROCESS

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

IMPORTANT

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

Capital Project: 1001814-Law AV Infra Upgrade 2022

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

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

**Scope**

Font Family Font Size Paragraph **A** **B** *I* U ABC X<sub>1</sub> X<sub>2</sub> [List Icons] [Align Icons] [Indent Icons]

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

Site Gross Area  acres

Project Gross Construction Area  square-feet

Impacted Area (Effective)  square-feet

Total Floor Area Ratio

Site Usable Area  acres

Project Usable Construction Area  square-feet

**Project Impacted Area** Select From Floor Plan | Add | Remove

Apply Filters Clear Filters

<input type="checkbox"/>	Campus	Building	Floor	Wing	Name	Type	Hierarchy	Area
No data to display								



## PROCESS

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

- Click the **Add** button

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

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

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

19) Click **OK** to select

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

## IMPORTANT

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

Capital Project: 1001814-Law AV Infra Upgrade 2022

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

Activate Calculate Save Save & Close More

**Site Information**

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

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

**Project Impacted Area** Select From Floor Plan Add Remove

Apply Filters Clear Filters

OK Cancel

**All Locations** Apply Filters Clear Filters

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

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



PROCESS

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

Capital Project: 1001814-Law AV Infra Upgrade 2022

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

**Site Information**

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

**20**  square-feet

**Project Impacted Area** Select From Floor Plan Add Remove

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

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

1 - 1 of 1 items

**Parking**

Parking Design  Parking Ratio   
 Total Parking Spaces  Covered Parking Space   
 Handicap Parking Spaces

Activate Calculate Save Save & Close More x

IMPORTANT

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





PROCESS

From the Schedule tab,

- 22) Adjust the **Plan Start** date, which represents the initiation of the project.
- 23) Adjust the **Substantial Completion** date, which represents the date the construction is to be completed.
- 24) Adjust the **Anticipated Financial End** date, which represents the date when all financial transactions should be completed and processed.

IMPORTANT

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

Capital Project: 1001814-Law AV Infra Upgrade 2022

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

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

**Summary**

22 \* Plan Start **09/21/2023**

23 \* Substantial Completion **05/31/2024**

\* Anticipated Financial End **05/31/2024**

24 \* Calculate Project From **Start**

Actual Start  
Calculated Start 07/08/2022  
Time Zone (GMT -6) Central Time (US, Canada) [US/Central]

**Project Tasks Gantt**

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



PROCESS

Once you add all necessary updates to the Project Record,

25) Click the **Save** button

26) Click the **Activate** button

Capital Project: 1001814-Law AV Infra Upgrade 2022

General Scope **Schedule** Budget Procurement Cash Flow Contacts Closeout Security Notifications Notes 25 **Activate** Calculate 26 **Save** Save & Close More x

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

**Summary**

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

**Project Tasks Gantt**

Zoom to mont Show Baseline

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

... July 2022 August 2022 September 2022

IMPORTANT



PROCESS

The saved project is now accessible directly from the **Facilities Connect Home Screen** via:

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

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Home

Reminders - Projects

Project Checklists In Revision

My Projects - Phase 0.0 Initial Request

Project Name	Project Status	Plan Complete	P
<a href="#">Law AV Infra Upgrade 2022</a>			

My Projects - Phase 1.0 Feasibility

Project Name	Project Status	Plan Complete	Project Manager	Primary Location
<a href="#">Tech Lab HVAC C...</a>	On Hold		Wright,Teri	

My Capital Projects

Project Reports

Space Information

My Responsible Spaces

Northwestern Spaces

IMPORTANT