PROJECT MANAGEMENT



Creating Project Reports



CREATING PROJECT REPORTS

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for locating, creating, and completing weekly project status reports, known in Facilities Connect as Project Reports.

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

A project health check gives insight into projected performance by measuring key data critical to success across project. Just like a regular check-up, you can identify risks and eliminate issues on an ongoing basis before they become costly errors.

<u>Note</u>: Project Reports is not to be confused with management reporting (i.e. filterable reports) also available in the Facilities Connect Project Management module.

VERSION INFORMATION (THIS DOCUMENT)

Version 1.2 Release Date 09/18/2024

Owner **NU Facilities**

Version 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.

REVISION HISTORY

Most Recent →

| Version | Release Date | Action | Owner |
|---------|--------------|---------|---------------|
| 1.2 | 09/18/2024 | Updated | NU Facilities |
| 1.1 | 03/04/2022 | Updated | NU Facilities |
| 1.0 | 02/08/2019 | Created | NU Facilities |
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HOME SCREEN (COMPANY FOCUS)

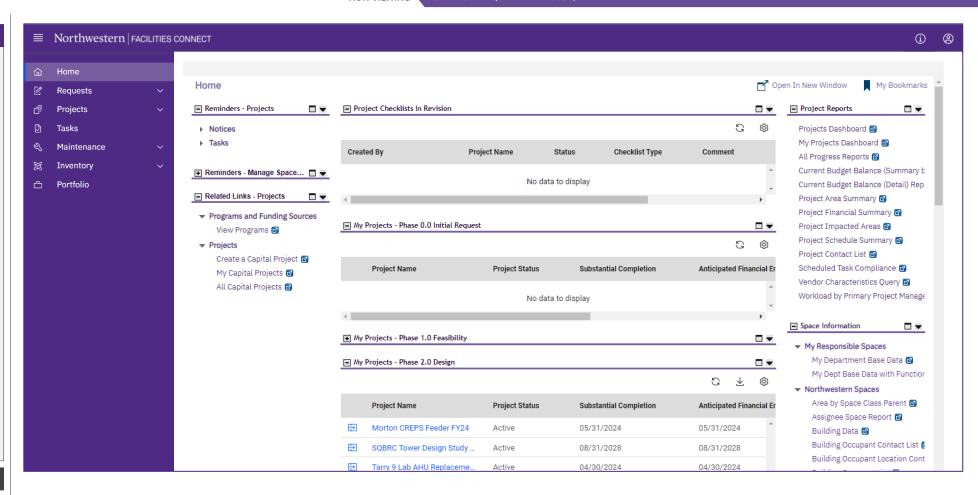
▼ GETTING STARTED

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

▶ PROCESS

▶ IMPORTANT

The Project Template only needs to be applied once; if it was already applied at project creation, <u>do not</u> reapply at this stage.

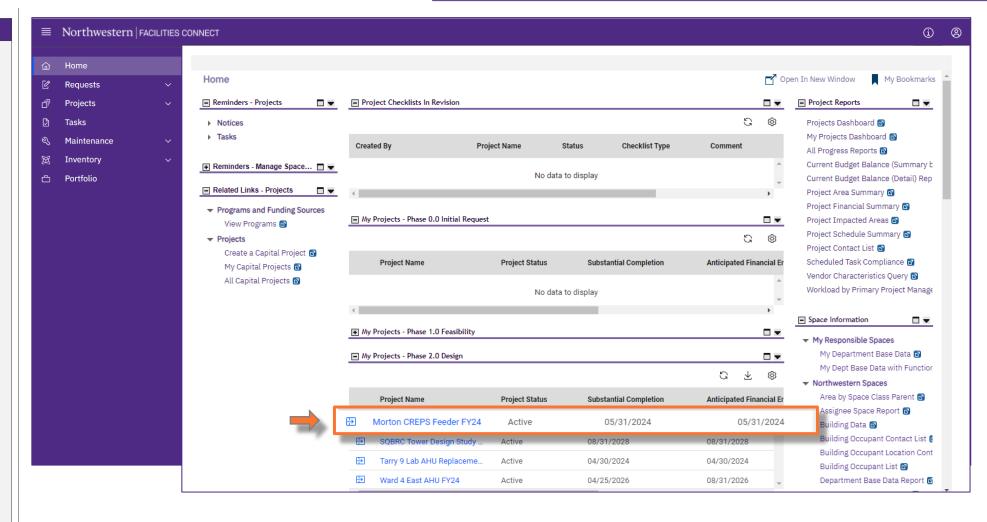




HOME SCREEN (COMPANY FOCUS)

▼ GETTING STARTED

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



▶ PROCESS

▶ IMPORTANT

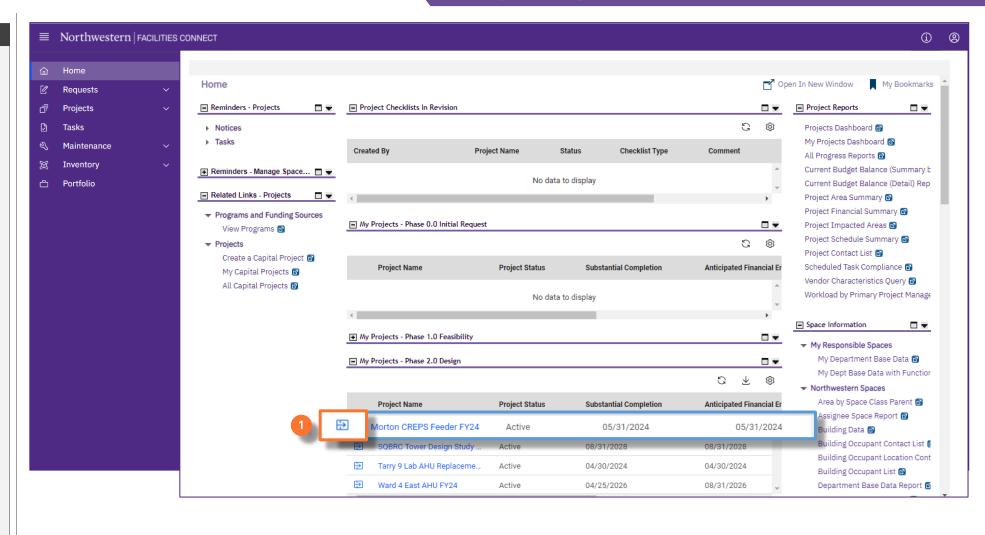


HOME SCREEN (COMPANY FOCUS)

▼ PROCESS

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

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



► IMPORTANT



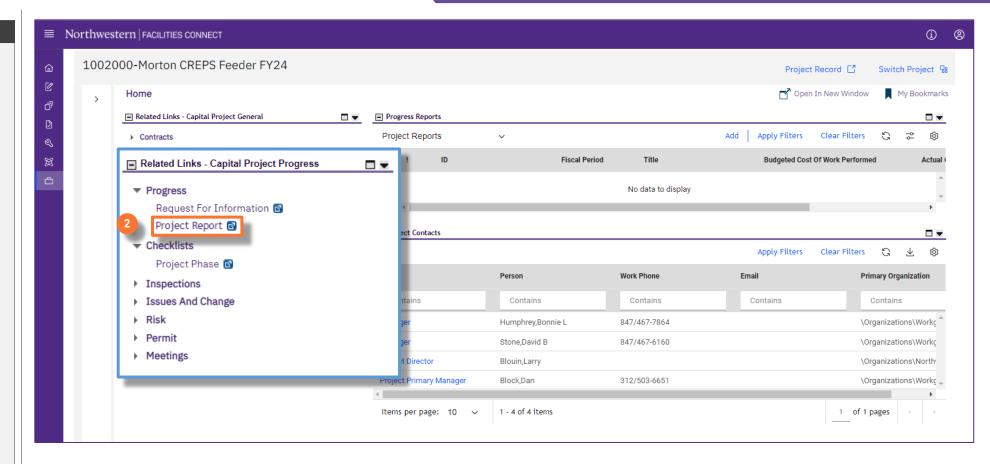
NOW VIEWING PROJECT

PROJECT INFORMATION (PROJECT FOCUS)

▼ PROCESS

 From the Related Links – Capital Project Progress portlet, click on the option for Project Report

<<Upon clicking, the Project Report
Menu for the selected project will
appear>>



► IMPORTANT



PROJECT REPORT MENU

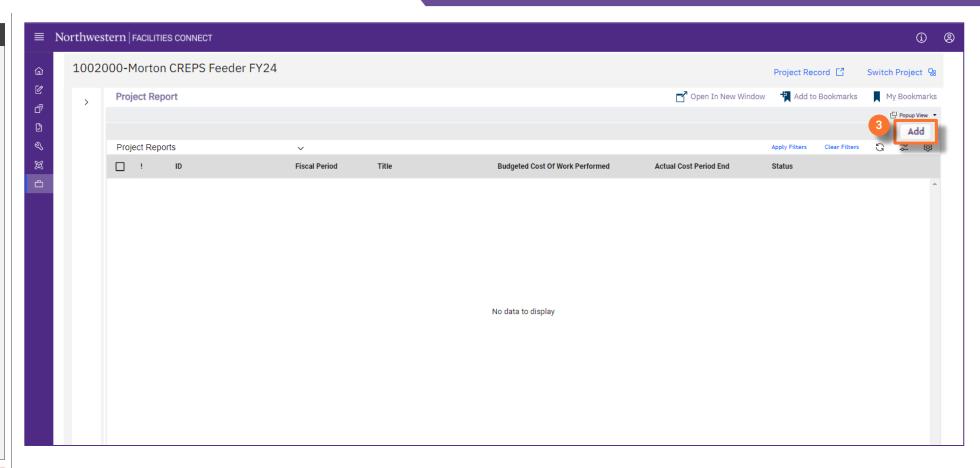
▼ PROCESS

3) From the **Project Report Menu**, click on the **Add** button to create a new project report

<<Upon clicking, the Project Report
Form will open as a new window>>

▼ IMPORTANT

As **Project Reports** are completed on a project, a chronological list of report records will be displayed on this screen





▼ PROCESS

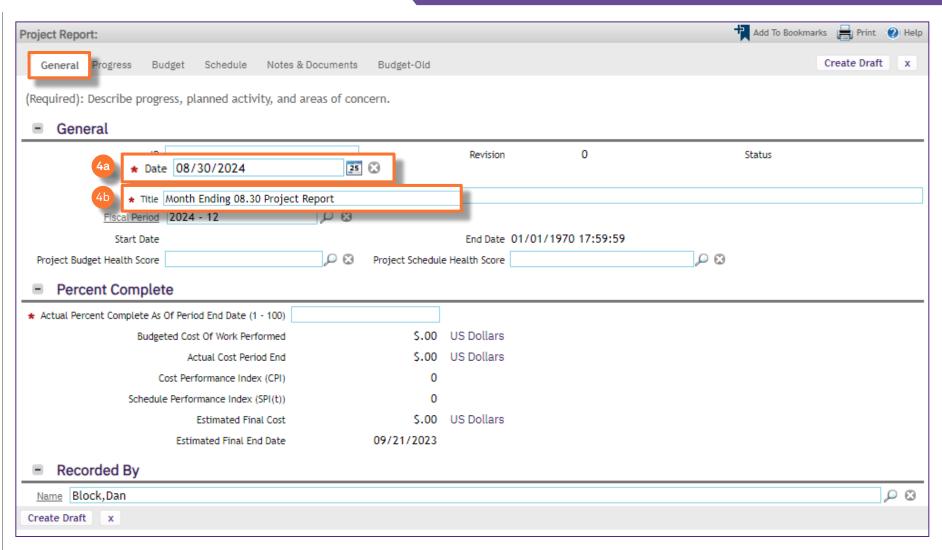
- 4) Begin on the General tab of the Project Report Form
 - a) Add a **Date** for the report; the date field will auto-populate with the current date

<u>Note</u>: You may change the Date by typing directly into the field, or by using the calendar icon (right of the field) to find and select

b) Add a Title for the report

<u>Tip:</u> It is helpful to use "Week of..." or "Week Ending..." as a common convention for titling your project reports. This will make it easier to locate and distinguish previous reports on the prior menu screen

▼ IMPORTANT





▼ PROCESS

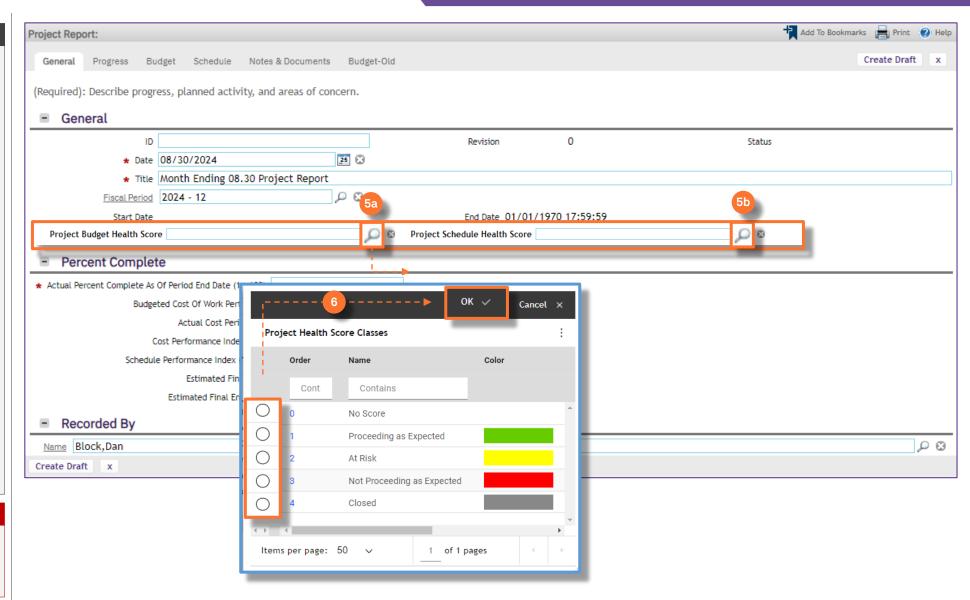
- 5) Next, select the appropriate Health Score for Project Budget and Project Schedule
 - To view available options, click on the Magnifying Glass icon

<<Available options will open in a new window>>

6) Select the desired **Health Score** by clicking the corresponding **Radio Button**. Then click **OK** to confirm the selection

Note: The Health Scores are self-selected by the Project Manager based on their knowledge of the project.

▼ IMPORTANT





PROJECT REPORT FORM

▼ PROCESS

7) Update the Actual Percent Complete As Of Period End Date (0-100) field by typing a numerical value of 1-100

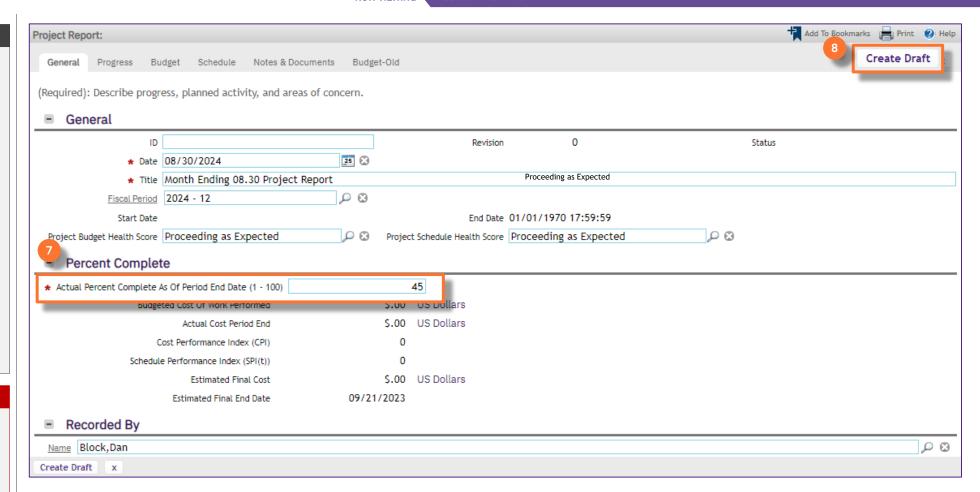
<u>Note</u>: The Actual Percent Completed is self-selected by the Project Manager based on their knowledge of the project.

8) Now that initial required fields are completed, click **Create Draft** to save a draft of the **Project Report**

▼ IMPORTANT

When determining the Actual Percent Completed:

- Prioritize schedule over billing
- Focus on the design or construction work complete
- Utilize Comments for context, found on the Notes & Documents tab



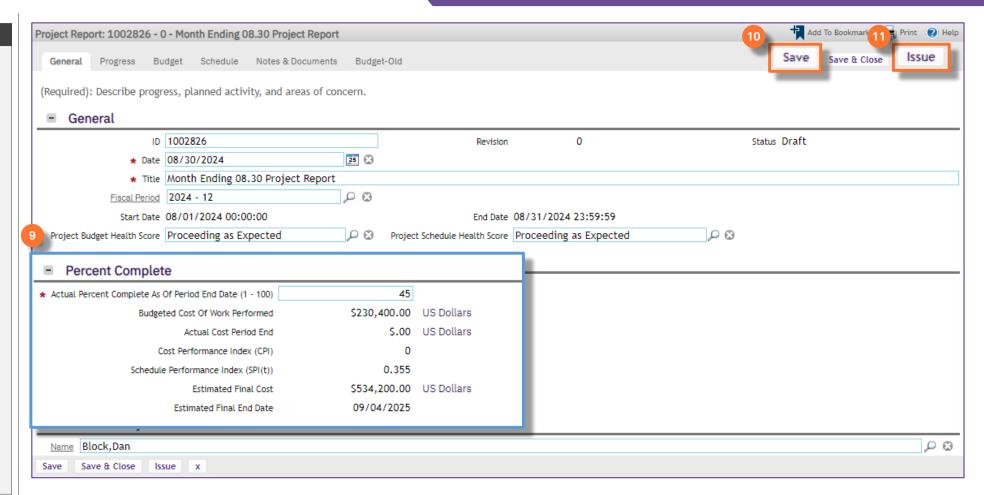


▼ PROCESS

Once the Draft has been created, the following fields will auto populate,

- 9) Percent Complete Section
 - Budgeted Cost of Work Performed represents Baseline Budget * % Complete
 - Actual Cost Period End represents Invoices Paid as of Report End Date
 - Cost Performance Index (CPI)
 represents Budgeted Cost of Work
 Performed / Actual Cost Period End
 - Schedule Performance Index (SPI)
 represents Earned Schedule Duration
 / Planned Days
 - Estimated Final Cost represents (Forecast Final – Paid Invoices)/CPI + Paid Invoices
 - Estimated Final End Date represents
 Project Plan Start + Estimated Final
 Duration
- 10) To complete the report, Click Save
- 11) Click Issue

▼ IMPORTANT

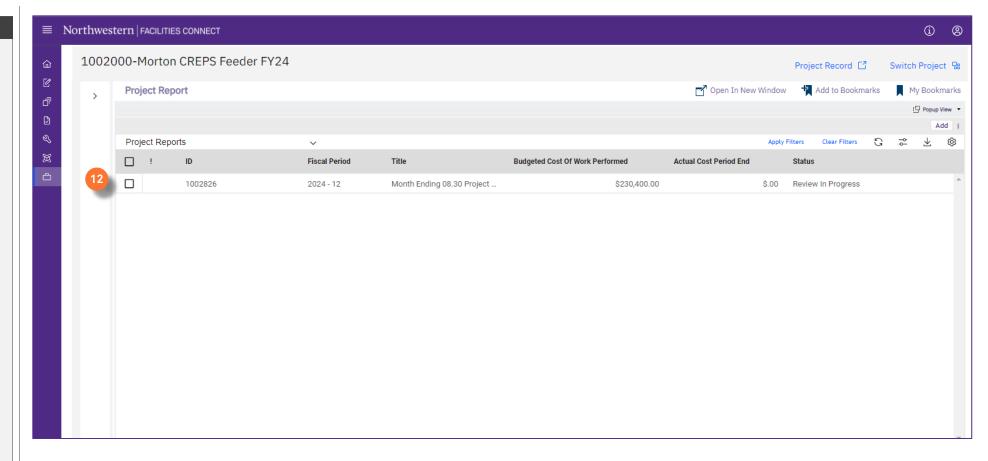




▼ PROCESS

12) Once Issued, the **Project Report** will appear as a new record on the **Project Report Menu** and can be accessed at any time

Note: BOTH a Project Report AND a Budget Forecast need to be created for the project to appear on the Health Dashboard.



▼ IMPORTANT

▼ PROCESS

▼ INFORMATION

Glossary of Terms

| Field | Description | |
|--|--|--|
| Actual Percent Complete As of Period End Date | Manual entry by PM, with estimated completion percentage | |
| Budgeted Cost of Work Performed | Baseline Budget * % Complete | |
| Actual Cost Period End | Invoices Paid as of Report End Date | |
| Cost Performance Index (CPI) | Budgeted Cost of Work Performed / Actual Cost Period End | |
| Schedule Performance Index (SPI(t)) | Earned Schedule Duration / Planned Days | |
| Estimated Final Duration | Utilizes: Planned Duration, Budgeted Cost of Work Performed, <u>Baseline Budget</u> <u>Spend Plan Curve</u> , <u>Baseline Budget</u> | |
| Estimated Final Cost | (Forecast Final – Paid Invoices)/CPI + Paid Invoices ELSE Forecast Final/CPI | |
| Forecast Final | Current Commitment + Potential Change Orders + Forecast to Complete | |
| Estimated Final End Date | <u>Project Plan Start</u> + Estimated Final Duration | |
| Estimated Final Duration | Planned Duration / SPI | |
| Planned Duration | Duration of Project Plan Start to Project Anticipated Financial End | |