



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.

Note: 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 Notes	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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▼ 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, do not reapply at this stage.

Northwestern | FACILITIES CONNECT

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My Dept Base Data with Functio

Northwestern Spaces

Area by Space Class Parent

Assignee Space Report

Building Data

Building Occupant Contact List

Building Occupant Location Cont

Created By

Project Name

Status

Checklist Type

Comment

No data to display

My Projects - Phase 0.0 Initial Request

Project Name

Project Status

Substantial Completion

Anticipated Financial Er

No data to display

My Projects - Phase 1.0 Feasibility

My Projects - Phase 2.0 Design

Project Name

Project Status

Substantial Completion

Anticipated Financial Er

Morton CREPS Feeder FY24

Active

05/31/2024

05/31/2024

SQBRC Tower Design Study ...

Active

08/31/2028

08/31/2028

Tarry 9 Lab AHU Replaceme...

Active

04/30/2024

04/30/2024



▼ GETTING STARTED

- ❖ Locate your desired project, contained within the **‘My Projects’ Phase** portlets (center of **Facilities Connect Home Screen**)

► PROCESS

► **IMPORTANT**

Northwestern | FACILITIES CONNECT

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Open In New Window My Bookmarks

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- Notices
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Reminders - Manage Space...

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
No data to display				

Project Reports

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- Project Financial Summary
- Project Impacted Areas
- Project Schedule Summary
- Project Contact List
- Scheduled Task Compliance
- Vendor Characteristics Query
- Workload by Primary Project Manager

My Projects - Phase 0.0 Initial Request

Project Name	Project Status	Substantial Completion	Anticipated Financial End Date
No data to display			

My Projects - Phase 1.0 Feasibility

My Projects - Phase 2.0 Design

Project Name	Project Status	Substantial Completion	Anticipated Financial End Date
Morton CREPS Feeder FY24	Active	05/31/2024	05/31/2024
SQBRC Tower Design Study ...	Active	08/31/2028	08/31/2028
Tarry 9 Lab AHU Replaceme...	Active	04/30/2024	04/30/2024
Ward 4 East AHU FY24	Active	04/25/2026	08/31/2026

Space Information

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



PROCESS

- 1) 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>>

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Project Reports

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Assignee Space Report

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Building Occupant Contact List

Building Occupant Location Cont

Building Occupant List

Department Base Data Report

Created By

Project Name

Status

Checklist Type

Comment

No data to display

Reminders - Manage Space...

Related Links - Projects

Programs and Funding Sources

View Programs

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Create a Capital Project

My Capital Projects

All Capital Projects

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Project Name

Project Status

Substantial Completion

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No data to display

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Project Name

Project Status

Substantial Completion

Anticipated Financial Er

Morton CREPS Feeder FY24

Active

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Active

04/30/2024

04/30/2024

Ward 4 East AHU FY24

Active

04/25/2026

08/31/2026

1

► IMPORTANT



▼ PROCESS

- 2) 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

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1002000-Morton CREPS Feeder FY24

Project Record [Open In New Window](#) [Switch Project](#) [My Bookmarks](#)

Home

Related Links - Capital Project General Progress Reports

Contracts Project Reports

Related Links - Capital Project Progress

Progress

Request For Information

2 Project Report

Checklists

Project Phase

Inspections

Issues And Change

Risk

Permit

Meetings

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

Project Contacts

Person	Work Phone	Email	Primary Organization
Contains	Contains	Contains	Contains
ger	Humphrey,Bonnie L	847/467-7864	\Organizations\Workc
ger	Stone,David B	847/467-6160	\Organizations\Workc
t Director	Blouin,Larry		\Organizations\North
Project Primary Manager	Block,Dan	312/503-6651	\Organizations\Workc

Items per page: 10 1 - 4 of 4 items 1 of 1 pages



▼ 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

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1002000-Morton CREPS Feeder FY24

Project Report

Project Reports

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



▼ 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

Note: 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

Tip: 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

Project Reports should be completed monthly (by COB on the last business day of each month)

Project Report:

General

Progress

Budget

Schedule

Notes & Documents

Budget-Old

Create Draft

x

(Required): Describe progress, planned activity, and areas of concern.

- General

4a

* Date

08/30/2024

25

x

4b

* Title

Month Ending 08.30 Project Report

Fiscal Period

2024 - 12

x

Start Date

End Date

01/01/1970 17:59:59

Project Budget Health Score

x

Project Schedule Health Score

x

- Percent Complete

* Actual Percent Complete As Of Period End Date (1 - 100)

Budgeted Cost Of Work Performed

\$.00

US Dollars

Actual Cost Period End

\$.00

US Dollars

Cost Performance Index (CPI)

0

Schedule Performance Index (SPI(t))

0

Estimated Final Cost

\$.00

US Dollars

Estimated Final End Date

09/21/2023

- Recorded By

Name

Block, Dan

x

Create Draft

x



▼ 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 Reports should be completed monthly (by COB on the last business day of each month)

Project Report:

Add To Bookmarks

Print

Help

General

Progress

Budget

Schedule

Notes & Documents

Budget-Old

Create Draft

x

(Required): Describe progress, planned activity, and areas of concern.

General

ID

Revision

0

Status

Date

08/30/2024

Title

Month Ending 08.30 Project Report

Fiscal Period

2024 - 12

Start Date

End Date

01/01/1970 17:59:59

Project Budget Health Score

Project Schedule Health Score

Percent Complete

Actual Percent Complete As Of Period End Date (1

Budgeted Cost Of Work Per

Actual Cost Per

Cost Performance Inde

Schedule Performance Index

Estimated Fin

Estimated Final En

Recorded By

Name

Block, Dan

Create Draft

x

5a

5b

6

OK

Cancel

Project Health Score Classes

Order	Name	Color
0	No Score	
1	Proceeding as Expected	
2	At Risk	
3	Not Proceeding as Expected	
4	Closed	

Items per page:

50

1 of 1 pages



▼ PROCESS

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

Note: 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

Project Report: Add To Bookmarks Print Help

General Progress Budget Schedule Notes & Documents Budget-Old

(Required): Describe progress, planned activity, and areas of concern.

General

ID Revision 0 Status

* Date 25 ×

* Title Proceeding as Expected

Fiscal Period 🔍 ×

Start Date End Date

Project Budget Health Score 🔍 × Project Schedule Health Score 🔍 ×

Percent Complete

* Actual Percent Complete As Of Period End Date (1 - 100)

Budgeted Cost Or Work Performed \$.00 US Dollars

Actual Cost Period End \$.00 US Dollars

Cost Performance Index (CPI) 0

Schedule Performance Index (SPI(t)) 0

Estimated Final Cost \$.00 US Dollars

Estimated Final End Date 09/21/2023

Recorded By

Name 🔍 ×

Create Draft x



▼ 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

Project Reports should be completed monthly (by COB on the last business day of each month)

Project Report: 1002826 - 0 - Month Ending 08.30 Project Report

10

Add To Bookmark

11

Print

Help

General

Progress

Budget

Schedule

Notes & Documents

Budget-Old

(Required): Describe progress, planned activity, and areas of concern.

-

General

ID

1002826

Revision

0

Status

Draft

* Date

08/30/2024

25

x

* Title

Month Ending 08.30 Project Report

Fiscal Period

2024 - 12

🔍

x

Start Date

08/01/2024 00:00:00

End Date

08/31/2024 23:59:59

9

Project Budget Health Score

Proceeding as Expected

🔍

x

Project Schedule Health Score

Proceeding as Expected

🔍

x

-

Percent Complete

* Actual Percent Complete As Of Period End Date (1 - 100)

45

Budgeted Cost Of Work Performed

\$230,400.00

US Dollars

Actual Cost Period End

\$.00

US Dollars

Cost Performance Index (CPI)

0

Schedule Performance Index (SPI(t))

0.355

Estimated Final Cost

\$534,200.00

US Dollars

Estimated Final End Date

09/04/2025

Name

Block, Dan

🔍

x

Save

Save & Close

Issue

x



▼ 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

Project Reports should be completed monthly (by COB on the last business day of each month)

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1002000-Morton CREPS Feeder FY24

Project Report

Project Reports							
	ID	Fiscal Period	Title	Budgeted Cost Of Work Performed	Actual Cost Period End	Status	
12	1002826	2024 - 12	Month Ending 08.30 Project ...	\$230,400.00	\$0.00	Review In Progress	



▼ 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	<u>Baseline Budget</u> * % 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 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 + <u>Forecast to Complete</u>
Estimated Final End Date	<u>Project Plan Start</u> + Estimated Final Duration
Estimated Final Duration	Planned Duration / SPI
Planned Duration	Duration of <u>Project Plan Start</u> to <u>Project Anticipated Financial End</u>