



## PROJECT MANAGER

## LOCATE CAPITAL PROJECT WORK TASKS

Provides guidance for locating Capital Project Work Tasks in Facilities Connect.

### ▼ GETTING STARTED

There are two main ways to access the Project Record. For more information on **FC Desktop** access and navigation, please refer to **the Project Manager: Basic Navigation** job aid.

### DIRECTIONS:

- Option one: from the **FC Home Screen**,
- Click on the **Project Name** from the Phase section.

The screenshot shows the 'Home' dashboard in Facilities Connect. The 'My Projects - Phase 1.0 Feasibility' table is visible, with the following columns: Project Name, Project Status, Plan Complete, Project Manager, and Primary Location. The first row shows 'Tech Lab HVAC C...' with a status of 'Active' and Project Manager 'Wright,Teri'. A red box highlights the 'Project Name' column, and a red circle with the number '1' is placed over the project name.

### ▼ INFORMATION

When you are on the on the Projects tab, in Company Focus, the **center column** shows you all the projects you are assigned to by phase in descending order.

- Upon clicking, the **Capital Project record** will open in a new window.

The screenshot shows the 'Capital Project: 1001357-Tech Lab HVAC Controls 2019' record. The 'General' tab is active, displaying the following information:

- General**
  - ID: 1001357
  - Date: 01/31/2019
  - Name: Tech Lab HVAC Controls 2019
  - Project Reporting Name: Tech Lab HVAC Controls 2019
- Details**
  - Project Type: Lab/Research
  - Project Status: On Hold
  - Project Website: [Empty]
  - Project Classification: Systems Replacement
  - Project Phase: 1.2 Planning/Pre-Design
  - Project Category: Non-Capitalized
  - Accounting Cost Center: 1001357
  - Project Cost/SqFt (Budget Current / Project Gross Construction Area): \$5.00 US Dollars



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## DIRECTIONS:

3 Option two: from the **Project Focus** screen,

3 On the **Projects** tab, click on the **Project Record** button.

Role	Person	Work Phone	Email	Primary Organization
Project Director	Stone, David B	847/467-6160		\Organizations\Workgroups\Facilities Capital Programs
Project Primary Manager	Wright, Teri	847/491-5271		\Organizations\Workgroups\Facilities Capital Programs
	Fost, Richard	222-222-3333		

4 Upon clicking, the **Capital Project record** will open in a new window.

4 Click on the **Schedule** tab.

**General**

ID: 1001357      Status: Revision In Progress

\* Date: 01/31/2019

\* Name: Tech Lab HVAC Controls 2019

\* Project Reporting Name: Tech Lab HVAC Controls 2019

**Details**

Project Type: Lab/Research      Project Classification: Systems Replacement

Project Status: On Hold      Project Phase: 1.2 Planning/Pre-Design

Project Category: Non-Capitalized

Accounting Cost Center: 1001357      Project Cost/SqFt (Budget Current / Project Gross Construction Area): \$ .00 US Dollars



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## DIRECTIONS:

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On **Schedule** Tab, scroll down to the **Project Tasks** section, locate the **Work Task** you wish to view.

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Click on the **Work Task** link.

Capital Project: 1001357-Tech Lab HVAC Controls 2019

General Scope Schedule Budget Procurement Contacts Notes & Documents

Summary

Plan Start: 01/31/2019 Plan End: Actual Start: Actual End: Calculated Start: Calculated End: Time Zone: (GMT -6) Central Time (US, Canada) [US/Central] Calculate Project From: Start

Project Tasks Gantt

Project Tasks Critical Path Tasks Task Hierarchy Dependencies

Project Tasks

#	Type	ID	Task Name	Planned Start	Planned End	Percent Complete	Actual Cost	Status
0	Schedule Task	26443476	Phase 0.0 Initial Re...	01/31/2019 14:56:34	02/18/2019 14:56:34	0 percent	\$ .00	Draft
0	Schedule Task	26443477	Phase 1.0 Feasibilit...	02/18/2019 14:56:34	03/04/2019 14:56:34	0 percent	\$ .00	Draft
0	Schedule Task	26443634	Phase 2.0 Design	03/04/2019 14:56:34	03/24/2019 14:56:34	0 percent	\$ .00	Draft
0	Schedule Task	26443480	Phase 4.0 Construct...	04/08/2019 14:56:32	04/22/2019 14:56:32	0 percent	\$ .00	Draft

## ▼ INFORMATION

The tasks listed in the **Project Task** section include both **Schedule Tasks** and **Work Tasks**. **Schedule Tasks** are tasks to indicate the phase of the **Project**. The **Work Tasks** are the tasks created to complete the actual work for the **Project**.

When looking at the **Type** column, remember that it is in alphabetical order. Therefore, all **Work Tasks** related to the **Project** will be at the bottom of the list.

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Upon clicking, the **Work Task** will open.

Work Task: WT-1043449-W0721992-ALLISON ELEV 1 EVPAINT SUPPORT

General Job Cost Work Details Resources Procedures Notifications Notes & Documents Work Task Info Audit Actions

(Required): Use this tab to enter, review, or change basic information about the task.

General

Task ID: WT-1043449 Status: Active

Task Name: W0721992-ALLISON ELEV 1 EVPAINT SUPPORT Assignment Status

Description: EVPAINT-ALLISON 1 DOORS PAINT SUPPORT  
WT-1040635 was deleted when schedule was posted

Task Reissue Reason: Currency: US Dollars

Details

Task Type: Planned Task Priority: Capital Project

Request Class: Facilities Service Class: Project

Primary Work Location: Locations\Evanston Campus\Allison Hall\01\EL1-01 Building Address: 1820 Chicago Ave

Geography Lookup: Building Name: Allison Hall

Customer Organization: Building Primary Use: Dormitory

Preferred Access Time:



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## DIRECTIONS:

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*Continued.* Across the top of the **Work Task** are tabs which take you to different sections where you can view information and perform various transactions.



- 6a **General:** the **General** tab contains all the general information on the **Work Task**. Information including: the location, description of the work, link to the associated **Service Request**, the **Responsible Organization**, the **Planned Start** and **Planned End**, etc.
- 6b **Work Task Info:** the **Work Task Info** tab shows a view containing information from several tabs. There is a combined view of general information, **Resources**, **Time Log**, **Material**, **Parts**, **Equipment**, and the linked **Service Request**.
- 6c **Job Cost:** the **Job Cost** tab contains all the financial details related to the **Work Task**. Some of the information includes: **Cost Summary**, **Billing Allocation**, **Billing Type**, etc.
- 6d **Work Details:** the **Work Details** tab contains several sub-tabs, most of which are duplicate information found elsewhere on the **Work Task**. Some important sub-tabs to note are: **Assets**, **Work Analysis (Resolution)**, **Hold Log**, etc.
- 6e **Resources:** The **Resources** tab contains information on **Resources**, **Materials**, **Parts**, and **Equipment**. From this tab you can add and remove **Resources**, view and add **Time Entries**, and view the **Materials**, **Parts**, and **Equipment** associated with the **Work Task**.
- 6f **Procedures:** the **Procedures** tab lists the **Safety Procedures** associated with the **Work Task**. In this tab you have the ability to add and remove **Safety Procedures**.
- 6g **Notifications:** the **Notifications** tab will have all the **Notification Records** associated with the **Work Task**. Also included: the list of **Approvers** (if applicable), a link to the **Approval Record**, and any **Status Change Notifications** (if applicable).
- 6h **Notes & Documents:** The **Notes & Documents** tab contains all the **Comments** and **Documents** added to the **Work Task**.