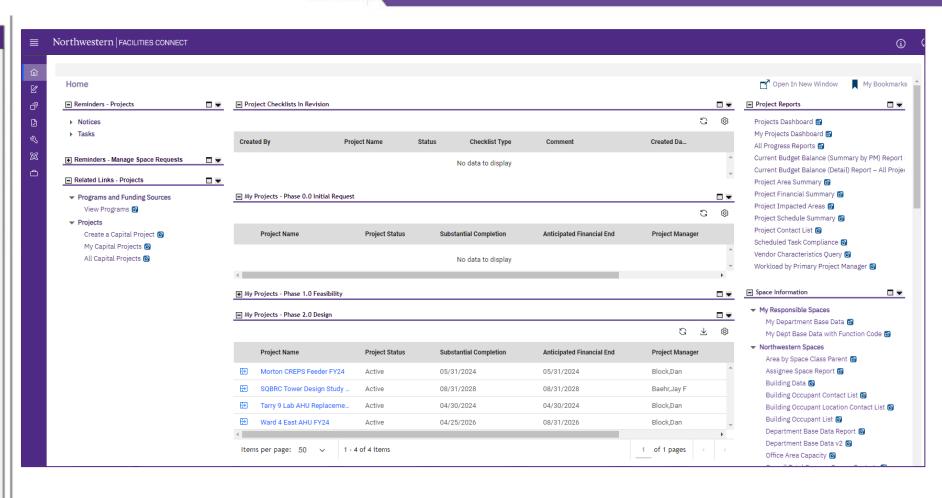# Adjusting Schedule Dates

NOW VIEWING

▼ GETTING STARTED

❖ These dates should be included in the initial project record set up. But it is best practice for the **Project Manger** to confirm the dates during your **project record set up completion process**.

❖ To begin, access the **Facilities Connect Home Screen**

❖ In order to review **Project Financials** as outlined in this job guide, the project **must:**
   a. Be an existing project, already created in Facilities Connect.
   b. Have its Project Category selected as **Capitalized** and include a capital chartstring.

▶ PROCESS

▶ IMPORTANT

Northwestern | FACILITIES CONNECT

Home

Open In New Window   My Bookmarks

Reminders - Projects
- ▶ Notices
- ▶ Tasks

Project Checklists In Revision

Created By	Project Name	Status	Checklist Type	Comment	Created Da...

No data to display

Reminders - Manage Space Requests

Related Links - Projects
- ▼ Programs and Funding Sources
  - View Programs
- ▼ Projects
  - Create a Capital Project
  - My Capital Projects
  - All Capital Projects

My Projects - Phase 0.0 Initial Request

Project Name	Project Status	Substantial Completion	Anticipated Financial End	Project Manager

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	Project Manager
Morton CREPS Feeder FY24	Active	05/31/2024	05/31/2024	Block,Dan
SQBRC Tower Design Study ...	Active	08/31/2028	08/31/2028	Baehr,Jay F
Tarry 9 Lab AHU Replaceme...	Active	04/30/2024	04/30/2024	Block,Dan
Ward 4 East AHU FY24	Active	04/25/2026	08/31/2026	Block,Dan

Items per page: 50   1 - 4 of 4 items   1 of 1 pages

Project Reports
- Projects Dashboard
- My Projects Dashboard
- All Progress Reports
- Current Budget Balance (Summary by PM) Report
- Current Budget Balance (Detail) Report – All Proje
- Project Area Summary
- Project Financial Summary
- Project Impacted Areas
- Project Schedule Summary
- Project Contact List
- Scheduled Task Compliance
- Vendor Characteristics Query
- Workload by Primary Project Manager

Space Information
- ▼ My Responsible Spaces
  - My Department Base Data
  - My Dept Base Data with Function Code
- ▼ Northwestern Spaces
  - Area by Space Class Parent
  - Assignee Space Report
  - Building Data
  - Building Occupant Contact List
  - Building Occupant Location Contact List
  - Building Occupant List
  - Department Base Data Report
  - Department Base Data v2
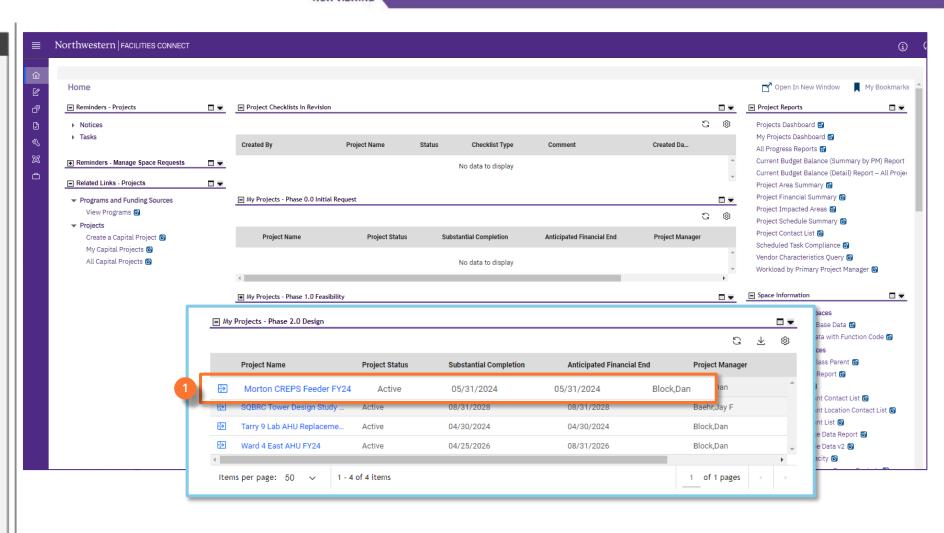 - Office Area Capacity

NOW VIEWING

▼ PROCESS

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

1) Click on the **Project Name** to open project details.

<<Upon clicking, the **Capital Project Record** will open as a new window displaying project details>>

▶ IMPORTANT

Northwestern | FACILITIES CONNECT

Home

Reminders - Projects
- ▸ Notices
- ▸ Tasks

Project Checklists In Revision

Created By	Project Name	Status	Checklist Type	Comment	Created Da...

No data to display

Related Links - Projects
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- ▾ Projects
  - Create a Capital Project
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My Projects - Phase 0.0 Initial Request

Project Name	Project Status	Substantial Completion	Anticipated Financial End	Project Manager

No data to display

My Projects - Phase 1.0 Feasibility

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Project Reports
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- Workload by Primary Project Manager

Space Information

Open In New Window   My Bookmarks

NOW VIEWING

▼ PROCESS

2) Click **Revise** to make changes to the Project Record.

▶ IMPORTANT

Capital Project: 1002000-Morton CREPS Feeder FY24

Add To Bookmarks   Print   ?

General   Scope   Schedule   Budget   Procurement   Contacts   Notes & Documents

②   lete   Revise

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

— **General**

ID	1002000	Status	Active
★ Date	09/21/2023		
★ Name	Morton CREPS Feeder FY24		
★ Project Reporting Name	Morton CREPS Feeder FY24		

— **Details**

Project Type	Repair/Restoration	Project Classification	Systems Replacement
★ Project Status	Active	Project Phase	2.0 Design
Laser Fiche	https://fmlaserfiche01.ads.northwestern.edu/laserfiche/Browse.aspx?repo=NUFM#?id=110338		
★ Project Category	Capitalized	★ Chartstring	812-1800100-80066377-01
Accounting Cost Center	812-1800100-80066377-01	Project Cost/SqFt (Budget Current / Project Gross Construction Area)	$.00 US Dollars

⊞ **Units**

⊞ **Environmental**

— **Primary Customer Contact**

Client Lookup

Address

Zip/Postal Code

City

State/Province   Country

Email   Phone

Department   Job Title

— **Primary Location**

★ Location Path   \Locations\Chicago Campus\Morton Medical Research

Campus   Chicago Campus   Floor

Building   Morton Medical Research

NOW VIEWING

PROCESS

Once the record is in Revise status,

3) Click on the **Schedule** tab.

IMPORTANT

Capital Project: 1002000-Morton CREPS Feeder FY24

Add To Bookmarks | Print | Help

General | Scope | Schedule | Budget | Procurement | Contacts | Notes & Documents

Activate | Save | Save & Close | More | x

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

General

ID 1002000   Status Revision In Progress
★ Date 09/21/2023
★ Name Morton CREPS Feeder FY24
★ Project Reporting Name Morton CREPS Feeder FY24

Details

Project Type Repair/Restoration   Project Classification Systems Replacement
★ Project Status Active   Project Phase 2.0 Design
Laser Fiche https://fmlaserfiche01.ads.northwestern.edu/laserfiche/Browse.aspx?repo=NUFM#?id=110338
★ Project Category Capitalized   ★ Chartstring 812-1800100-80066377-01
Accounting Cost Center 812-1800100-80066377-01   Project Cost/SqFt (Budget Current / Project Gross Construction Area) $.00   US Dollars

Units

Environmental

Primary Customer Contact
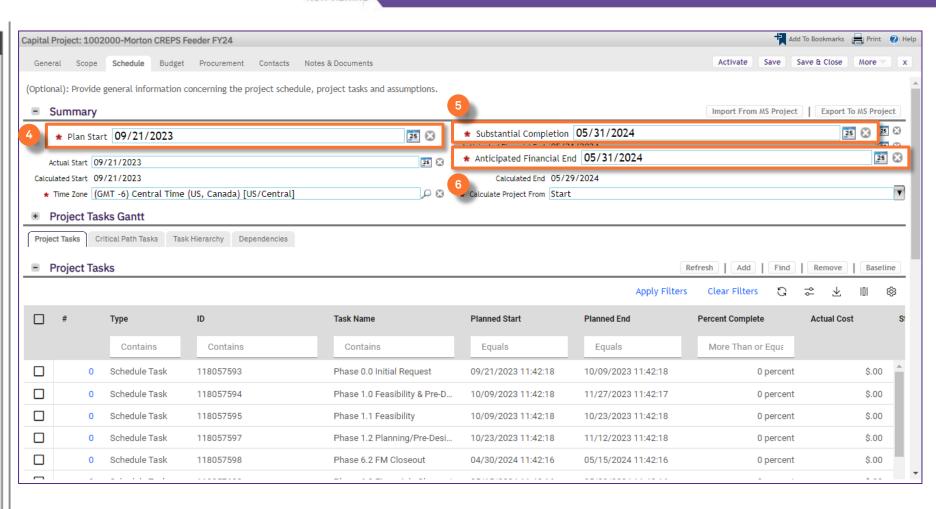
Client Lookup
Address
Zip/Postal Code
City

NOW VIEWING

PROCESS

From the Schedule tab,

4) Edit the **Plan Start** date, which represents the initiation of the project.

5) Edit the **Substantial Completion** date, which represents the date construction is to be completed.

6) Edit the **Anticipated Financial End** date, which represents the when all financial transactions should be completed and processed for the project.

▶ IMPORTANT

Capital Project: 1002000-Morton CREPS Feeder FY24

Add To Bookmarks   Print   Help

General | Scope | **Schedule** | Budget | Procurement | Contacts | Notes & Documents

Activate | Save | Save & Close | More ▾ | x

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

⊟ Summary

Import From MS Project | Export To MS Project

4 ★ Plan Start 09/21/2023

5 ★ Substantial Completion 05/31/2024

Actual Start 09/21/2023

★ Anticipated Financial End 05/31/2024

Calculated Start 09/21/2023

Calculated End 05/29/2024

★ Time Zone (GMT -6) Central Time (US, Canada) [US/Central]

6 Calculate Project From Start

⊞ Project Tasks Gantt

Project Tasks | Critical Path Tasks | Task Hierarchy | Dependencies

⊟ Project Tasks

Refresh | Add | Find | Remove | Baseline

Apply Filters | Clear Filters

☐	#	Type	ID	Task Name	Planned Start	Planned End	Percent Complete	Actual Cost	S
		Contains	Contains	Contains	Equals	Equals	More Than or Equa		
☐	0	Schedule Task	118057593	Phase 0.0 Initial Request	09/21/2023 11:42:18	10/09/2023 11:42:18	0 percent	$.00	
☐	0	Schedule Task	118057594	Phase 1.0 Feasibility & Pre-D...	10/09/2023 11:42:18	11/27/2023 11:42:17	0 percent	$.00	
☐	0	Schedule Task	118057595	Phase 1.1 Feasibility	10/09/2023 11:42:18	10/23/2023 11:42:18	0 percent	$.00	
☐	0	Schedule Task	118057597	Phase 1.2 Planning/Pre-Desi...	10/23/2023 11:42:18	11/12/2023 11:42:18	0 percent	$.00	
☐	0	Schedule Task	118057598	Phase 6.2 FM Closeout	04/30/2024 11:42:16	05/15/2024 11:42:16	0 percent	$.00	

NOW VIEWING

PROCESS

Once the required fields have been updated,

7) Click **Save** to keep all date changes.

8) Click **Activate** to put the project record back into the Active status.

<<Upon clicking **Activate**, the Project Record window will close. >>

▶ IMPORTANT

Capital Project: 1002000-Morton CREPS Feeder FY24

Add To Bookmarks   Print   Help

General | Scope | Schedule | Budget | Procurement | Contacts | Notes & Documents

Activate   **Save**   e & Close   More   x

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

Summary

Import From MS Project | Export To MS Project

★ Plan Start 09/21/2023	★ Substantial Completion 05/31/2024
	★ Anticipated Financial End 05/31/2024
Actual Start 09/21/2023	Actual End 08/30/2024
Calculated Start 09/21/2023	Calculated End 05/29/2024
★ 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

Refresh | Add | Find | Remove | Baseline

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☐	#	Type	ID	Task Name	Planned Start	Planned End	Percent Complete	Actual Cost	S
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