



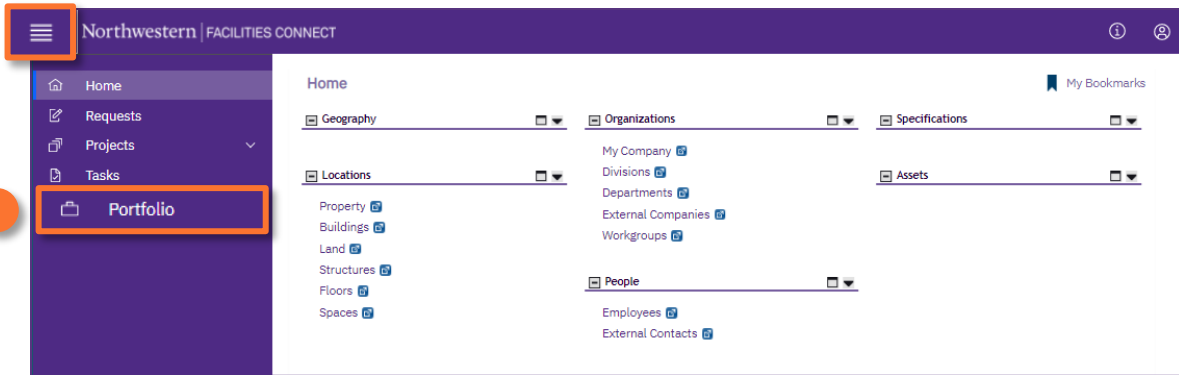
# UPDATE BUILDING BILLING ALLOCATION

Provides guidance for updating the chartstring information on a building record. The building billing information would only need to be changed at the request of a school or department.

## DIRECTIONS:

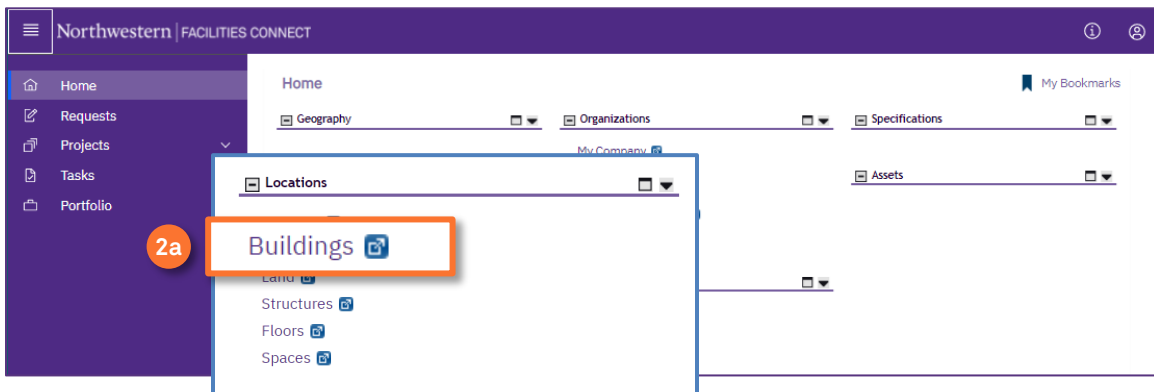
1 From the **Facilities Connect Home Screen**,

1 Click on the **Portfolio** section.



2 Locate the **Locations** section,

2 Click on the **Buildings** option.



# UPDATE BUILDING BILLING ALLOCATION

## DIRECTIONS:

- 3 From the **Buildings** list,
- 3 Use the **columns** to search for the desired location.

ID	Building	Property	Primary Use	Maintenance Zone	
Contains	Schapiro hall	Contains	Contains	Contains	
R129	1007 Orchard	Evanston Campus	Leased	0	Core (on campus)
R151	1033 University Pl	Evanston Campus	Leased	0	NA
R141	105 W. Adams	Chicago Campus	Leased	0	Non-Campus Property
8864	1201 Davis	Evanston Campus	Administration	5	Core (on campus)
R178	1270 Avenue of the ...	Off-Site	Leased		NA
R177	1475 Belvidere Road	Off-Site			
R124	1603 Orrington	Evanston Campus	Leased	0	Core (on campus)
8854	1800 Sherman	Evanston Campus	Administration	5	Core (on campus)

Items per page: 50 | 1 - 50 of 292 items | 1 of 6 pages

- 4 Once you have located the correct **Building**,

- 4a Click on the **Building Record** line.

ID	Building	Property	Primary Use	Maintenance Zone	Clery Class	Building Class
Contains	Schapiro hall	Contains	Contains	Contains	Contains	Contains
8665	Schapiro Hall	Evanston Campus	Dormitory	1	Core (on campus)	

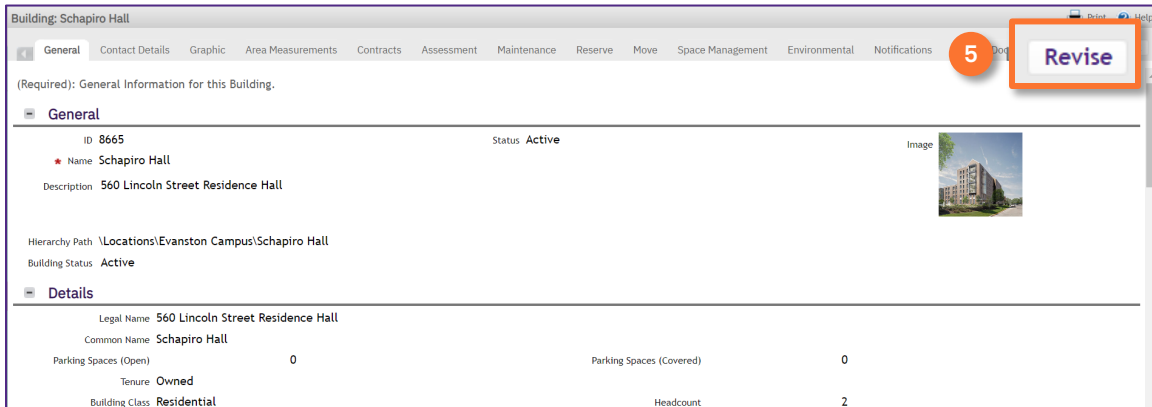
Items per page: 50 | 1 - 1 of 1 items | 1 of 1 pages

# UPDATE BUILDING BILLING ALLOCATION

## DIRECTIONS:

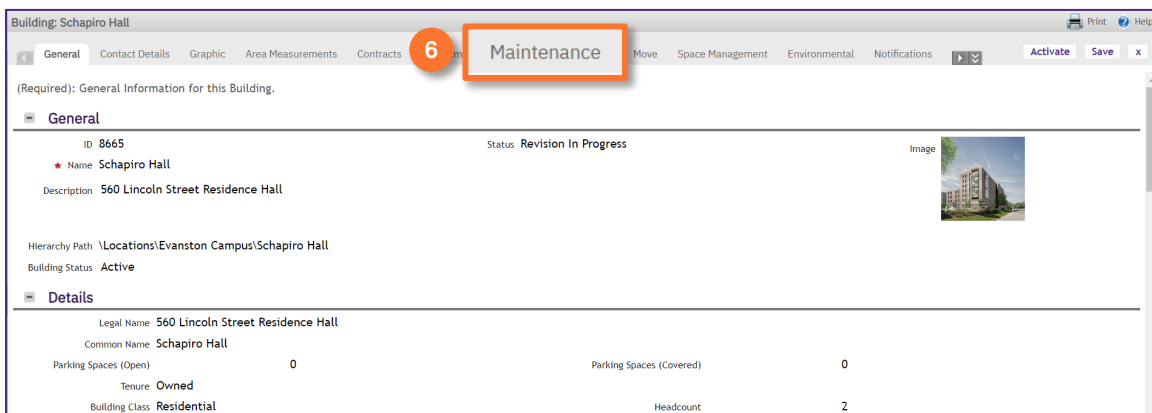
5 Upon clicking, the **Building Record** will open in a new window.

5 Click on the **Revise** button.



6 Once the record is in Revision in Progress mode,

6 Click on the **Maintenance** tab.



# UPDATE BUILDING BILLING ALLOCATION

## DIRECTIONS:

- 7 On the **Maintenance** tab,
  - 7 Locate the **Building Billing Allocation** section.

Building: Schapiro Hall

General Contact Details Graphic Area Measurements Contracts Assessment **Maintenance** Reserve Move Space Management Environmental Notifications

**Building Billing Allocation** Add Remove

Apply Filters Clear Filters

ID	Name	Description	Building Chart String	Account Code	Chart String Status	Allocated Percent
<input type="checkbox"/> 1000070	560 Lincoln Street		156-2224700	53515	Active	100

1 - 1 of 1 items

Service Matrix Records

Apply Filters Clear Filters

Request Class	Contract Name	Service Provider	Customer Organization	Location	Geography	Service Class
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- 8 To **remove** the existing Chartstring,
  - 8a Click on the **checkbox** in front of the existing Chartstring.
  - 8b Click the **Remove** button.

Building: Schapiro Hall

General Contact Details Graphic Area Measurements Contracts Assessment **Maintenance** Reserve Move Space Management Environmental Notifications

**Building Billing Allocation** Add Remove

Apply Filters Clear Filters

ID	Name	Description	Building Chart String	Account Code	Chart String Status	Allocated Percent
<input checked="" type="checkbox"/> 1000070	560 Lincoln Street		156-2224700	53515	Active	100

1 - 1 of 1 items

Service Matrix Records

Apply Filters Clear Filters

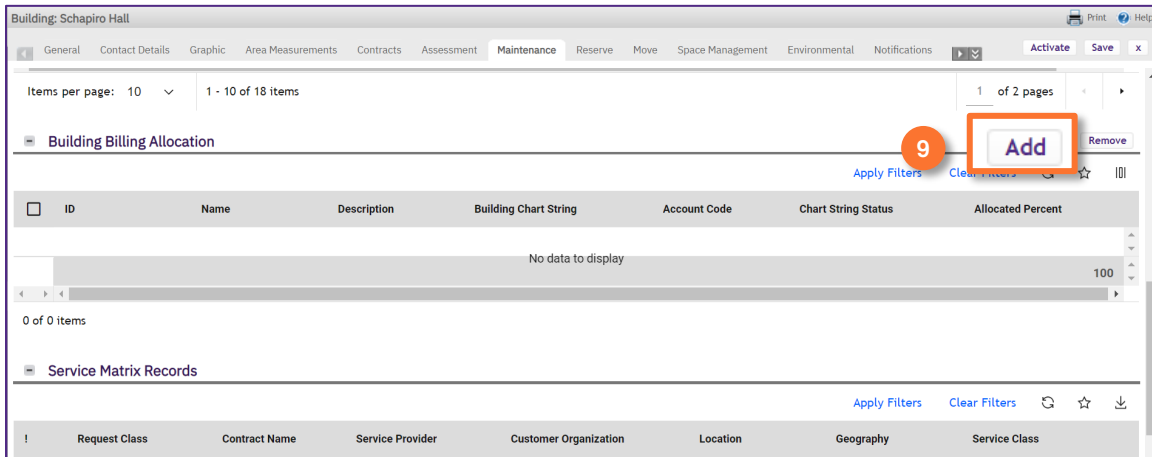
Request Class	Contract Name	Service Provider	Customer Organization	Location	Geography	Service Class
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# UPDATE BUILDING BILLING ALLOCATION

## DIRECTIONS:

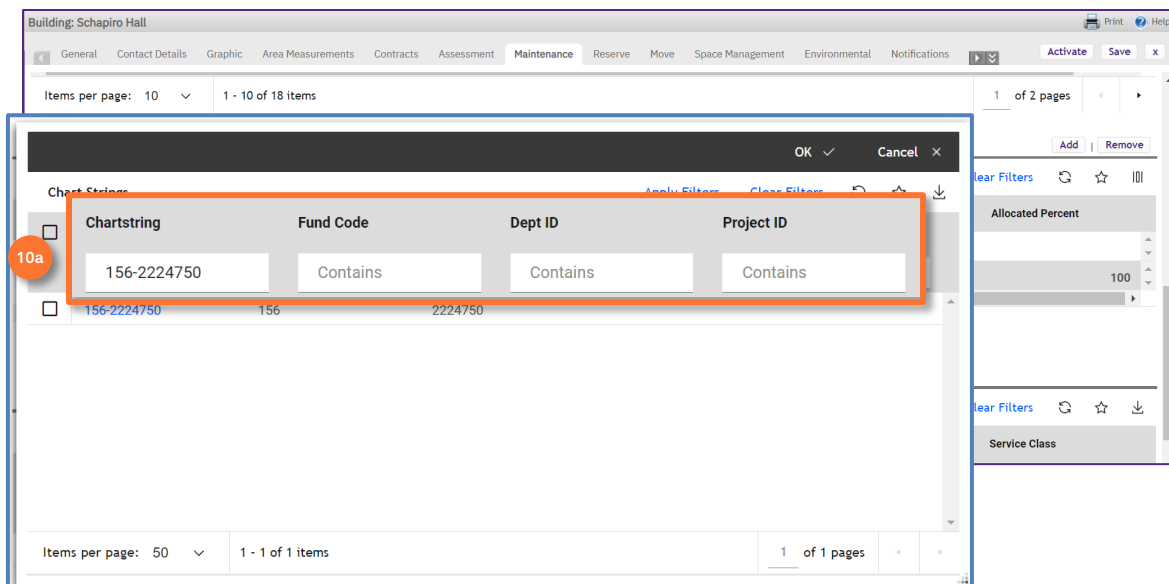
9 To **add** the new Chartstring,

9 Click on the **Add** button.



10 Upon clicking, the Chartstring search box will open.

10a Use the **columns** to search for the desired Chartstring.



# UPDATE BUILDING BILLING ALLOCATION

## DIRECTIONS:

**11** Once you have located the new Chartstring,

**11a** Click the **checkbox** to the left of the desired new Chartstring.

**11b** Click **OK** to save.

Building: Schapiro Hall

Items per page: 10 | 1 - 10 of 18 items

Chart Strings

Chartstring	Fund Code	Dept ID	Project ID	Activity ID
<input type="checkbox"/> 156-2224750	Contains	Contains	Contains	Contains
<input checked="" type="checkbox"/> 156-2224750	156	2224750		

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

**12** The new chartstring will now appear in the Building Billing Allocation section:

Building: Schapiro Hall

Items per page: 10 | 1 - 10 of 18 items

Building Billing Allocation

ID	Name	Description	Building Chart String	Account Code	Chart String Status	Allocated Percent
<input checked="" type="checkbox"/> 1000253	156-2224750		156-2224750	53515	Active	

1 - 1 of 1 items

Service Matrix Records

Request Class	Contract Name	Service Provider	Customer Organization	Location	Geography	Service Class
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# UPDATE BUILDING BILLING ALLOCATION

## DIRECTIONS:

**13** To save the changes to the Building Record,

**13a** Click the **Save** button.

**13b** Click the **Activate** button.

Building: Schapiro Hall

General Contact Details Graphic Area Measurements Contracts Assessment Maintenance Reserve Move Space Management Environmental

Items per page: 10 1 - 10 of 18 items

Building Billing Allocation Add Remove

ID	Name	Description	Building Chart String	Account Code	Chart String Status	Allocated Percent
<input type="checkbox"/>	1000253	156-2224750	156-2224750	53515	Active	0
						0

1 - 1 of 1 items

Service Matrix Records

Request Class	Contract Name	Service Provider	Customer Organization	Location	Geography	Service Class
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### IMPORTANT

Only once the Building Record has been Activated, will the new Account Codes be added to the Chartstring. If you are trying to update or run a Job Cost report and are not seeing the new Account Codes, please confirm that you have Activated the Building Record.

### INFORMATION

The building charges can be split between multiple Building Billing Allocations and the total **Allocated Percent** needs to sum to be 100%.

The most efficient way to achieve this, is to reduce the percentage on the first chartstring added and click save before adding a 2nd billing allocation chartstring.

Building Billing Allocation

Apply Filters Clear Filters

ID	Name	Description	Building Chart String	Account Code	Chart String Status	Allocated Percent
<input type="checkbox"/>	Contains	Contains	Contains	Contains	Contains	Equals
1000224	110-1851050	110-1851050	110-1851050	53502	Active	18.3
1000225	110-5011707	110-5011707	110-5011707	53502	Active	32.55
1000226	110-5502400	110-5502400	110-5502400	53502	Active	49.15
						100

1 - 3 of 3 items