Complete a New Project Record
COMPLETE A NEW PROJECT RECORD

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for completing a new project record in Facilities Connect. The Project Manager will take over this process from the Financial administrator who creates the new project record.

The purpose of this document is to serve as guided reference and/or new hire training on creating a new project, available to all applicable users in Facilities Connect.

VERSION INFORMATION (THIS DOCUMENT)

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<th>Release Date</th>
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<td>1.2</td>
<td>07/15/2022</td>
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<td>NU Facilities</td>
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The updated version of the document reflects the changes made to the Project Creation process in conjunction with Capital Projects and Finance departments.

REVISION HISTORY
Creating a new Capital Project is a joint effort with the Facilities Finance group.

The process starts once you receive an email confirmation from NUFinancials that the project has been created with a Chartstring.

This will trigger Facilities Finance to create the project and apply the necessary Template.

Dear Colleague,

The PROJECT_ID value 80062560 has been assigned by NUFinancials for Law AV Infra Upgrade 2022.

Please visit NUFinancials to view this Chartfield Request.

Based upon information provided for PROJECT_ID Request 1005 for 80062560:

- Fund associated with this Project is 812 (Unrestricted Plant Constr - Capital)
- DeptID associated with this Project is 550000 (Finance)
- Manager is Manager Project
- An expense budget totaling $480,000 has been established against requested accounts for chart string 812-550000-80062560
- A revenue budget totaling $480,000 has been established against Account 88505 for chart string 812-550000-80062560
- Project start and end date are 2023-01-01 through 2023-07-30
- Class attribute associated with this PROJECT_ID is 10 (Expenses for Plant)
- the Plant TiersUp attribute associated with this Project is Other
- the Plant Purpose attribute associated with this Project is Plant Chicago
- the Location Code associated with the Activity ID is 8115

Long Description and other attributes:
Infra structure upgrades to accommodate updates classroom technology in B classrooms: new cabling infrastructure (high and low voltage) for hearing assist, microphone arrays, projections systems, and AV control. Teaching wall modifications including passive ventilation for displays. Classrooms are located in Rubloff, Levy Mayer, and McCormick.

To learn more visit the ChartField Maintenance website or contact Accounting Services at 847-491-5337 or Chartfield_request@northwestern.edu.

You are welcome to contact me if you have any questions about this message.

Thank you,

Manager, Accounting Services
Financial Operations
Northwestern University
1) Once a Capital Project has been created in Facilities Connect,
   • Finance will send you a confirmation email with the new Project ID number.

2) Project managers are responsible for completing the following information in Facilities Connect,
   • Project Type and Project Classification
   • Contacts other than the Primary PM
   • Completing the Project Description on the Scope tab
   • Identifying the impacted area
   • Adding Schedule dates (start, end, etc.)
   • Subsequent info such as checklists, status reports, etc.

IMPORTANT

• All projects must comply with approved Naming Conventions; please refer to the Project Naming Conventions guide on the Facilities Connect website for more details.
To complete the Project Record, log into Facilities Connect.

3) Click the **Project Name** link in the Phase 0.0 section

<<Upon clicking, the Project Record will open in a new window>>

Do not click the Project View option, as you need to make edits to the Project Record.
Complete a new project record

From the Project Record screen,

4) Click the Project Type drop down arrow

5) Select the Type

### IMPORTANT

Abbott Hall Second Floor MFA Teaching Studio Buildout 2018
6) Click the Project Classification drop down arrow

7) Select the Classification

**Process**

- Abbott Hall Second Floor MFA Teaching Studio Buildout 2018
8) Once the Type and Classification have been entered, add any additional Contacts.
   - Click the Contact tab

<<Upon clicking, the Contacts tab will open in the same screen>>
9) Click the **Add Person** button

<<Upon clicking, the Contact Search pop-up will open>>

10) Use the drop-down menu to select the **External Contacts**

11) Use the available **Column Headers / Search Fields** to sort and filter the list of contacts to locate the desired contact

12) Once you have located the desired contact, click on the corresponding check boxes

13) Click **OK** to select

**IMPORTANT**

For additional information about adding contacts to projects, please refer to the Manage External Contacts OR Contacts Quick Add job guides.
For additional information about adding contacts to projects using the Contacts Quick Add function, please refer to the Contacts Quick Add job guides.
14) Once all the necessary Contacts have been added, update the information on the Scope tab
   • Click the Scope tab
   <<Upon clicking, the Scope tab will open in the same screen>>
15) Enter the **Project Description** in the text box of the Scope section.

**IMPORTANT**
- It is important to save the project as you make any changes using the **Save** button.
16) Scroll down to the Project Impacted Area section
   - Click the Add button
   <<Upon clicking, the All Locations search pop-up will open>>

17) Use the available Column Headers / Search Fields to sort and filter the list of locations to find the desired Building, Floor(s), or Space(s)

18) Once you have found the desired locations, click on the corresponding check boxes

19) Click OK to select
<<Repeat for all impacted spaces or floors>>

▼ IMPORTANT
- It is important to save the project as you make any changes using the Save button.
20) Once you add the add the Impacted Area(s), the square-footage information is automatically calculated under the Site Information section.

**IMPORTANT**

- It is important to save the project as you make any changes using the Save button.
21) Once all the Scope information has been added, click on the Schedule tab.

- It is important to save the project as you make any changes using the Save button.
22) Adjust the Schedule dates as needed,
   • i.e., Plan Start, Plan End or Phase dates

▼ IMPORTANT
   • For additional information about the Gantt Chart, please refer to the Gantt Chart Functionality job guide.
   • For additional information about how to request Work Tasks and POs, please refer to the Request Procedures job guide attached to the Facilities Finance email.
Once you add all necessary updates to the Project Record,

23) Click the **Save** button

24) Click the **Activate** button
The saved project is now accessible directly from the Facilities Connect Home Screen via:

- The ‘My Projects’ Phase portlets (located at the center of the screen), or
- The My Capital Projects menu (located on the left side of screen)