Course 2
Introduction to Facilities Connect and Creating a Project
In today’s course, we will explore the following:

- System Orientation / Navigation
- Useful Tips
- Creating a New Project
Section 1 | **System Orientation and Navigation**
INTRODUCTION TO FACILITIES CONNECT AND CREATING A PROJECT

FACILITIES CONNECT HOME SCREEN

Northwestern FACILITIES CONNECT

Home
- Project Checklists In Revision
  - Created By
  - Project Name
  - Status
  - Checklist Type
  - Comment
  - Created Date/Time
  No data to display.

- My Projects - 0.0 Initial Request
  - Project Name
  - Project Status
  - Plan Complete
  - Primary Contact
  - Primary Location
  No data to display.

- My Projects - 1.0 Feasibility
  - Project Name
  - Project Status
  - Plan Complete
  - Primary Contact
  - Primary Location
  No data to display.

- My Projects - 2.0 Design
  - Project Name
  - Project Status
  - Plan Complete
  - Primary Contact
  - Primary Location
  No data to display.

- My Projects - 3.0 Construction Procurement

- My Projects - 4.0 Construction

- My Projects - 5.0 Operational

- My Projects - 6.0 Close-Out

Last Visited

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

Space Information
- Area by Space Class Parent
- Assign Free Space Report
- Building Data
- Building Occupant Contact List
- Building Occupant List
- Department Base Data Report
- Department Base Data v2
- Office Area Capacity
- Overall Total Campus Square Footage
- Space Allocation
- Space Class Count by Building
- Space Report by Building
- Campus Mapping

Welcome, NU Wildcat | Sign Out | About
GETTING STARTED

A. The Portal Tabs provide general navigation across Facilities Connect; the selected tab will be highlighted in light purple

• Home Tab
• Portfolio Tab
B. The Focus Bar provides project search functionality and changes the orientation of the

- Company
- Project
- Magnifying Glass (Search)
C. The Related Links - Projects portlet contains the following links:

- **Create a Capital Project** – Launches the form to initiate a new project
- **My Capital Projects** – Provides a clickable list of all projects for which the user is associated (access/edit rights)
- **All Capital Projects** – Provides a clickable list of all NU Facilities projects (read only access for those projects which the user is not associated)
### GETTING STARTED

D. The ‘My Projects’ portlets provide a clickable queue of the user’s associated projects, grouped by the current project phase (each portlets can be expanded or collapsed)

- Project Checklists in Revision
- Phase 0.0 – Initial Request
- Phase 1.0 – Feasibility
- Phase 2.0 – Design
- Phase 3.0 – Construction Procurement
- Phase 4.0 – Construction
- Phase 5.0 – Operational
- Phase 6.0 – Close-Out
GETTING STARTED

E. The Project Reports portlet provides a clickable list of available project management module reports.
F. Project Focus is an available option on the Focus Bar for viewing project management options within a selected project.
GETTING STARTED

G. To search and select a specific project for modification, click the Magnifying Glass (Search) on the Focus Bar.

H. Once a project is selected, the Project Name will appear in the space immediately to the left of the Focus Bar. The Project Focus will now be highlighted in light purple, indicating that it is being displayed.
I. The Related Links – Capital Project Progress portlet will also be displayed, providing several clickable link options available to the user in managing his/her project, including:

- Request For Information – Add and attach an RFI to the project
- Project Report – Create an interim (e.g. weekly) project report
- Project Phase Checklist – Apply or update a project phase checklist
- Punchlist – Add a punchlist to the project
- Issue Item – Document an issue associated with the project
- Potential Change Order – Develop a potential change order for the project
- Risk Item – Document a risk associated with the project
- Permit Record – Add a permit to the project
- Meeting Record – Document a project meeting (e.g. weekly status report) and upload supporting documents
J. The Portfolio Portal Tab provides new options including the ability to search and update external companies and external contacts in Facilities Connect.
FACILITIES CONNECT HOME SCREEN

GETTING STARTED

K. The Organizations portlet contains a clickable link to view available External Companies (e.g. vendors)

L. The People portlet contains a clickable link to view and update External Contacts (e.g. vendors).

• Once an External Contact has been added and associated with an External Company, they may be classified in a specific role (e.g. General Contractor) and associated with a project
Section 2 | **Useful Tips for Facilities Connect**
The browser Back button is not supported in Facilities Connect.

Use of the browser Back button may log you out of Facilities Connect inadvertently, and create loss of unsaved work.

⚠️ **Do Not** click the browser Back button. Use available Facilities Connect action buttons and links throughout the system for navigation.
FACILITIES CONNECT - USEFUL TIPS

GETTING STARTED

- Save work often; unsaved changes can easily be lost in Facilities Connect.

The Save and Save & Close buttons are located in the top right corner of most screens and forms in Facilities Connect.

⚠️ Save your work often using the Save and Save & Close buttons.
Be mindful of the **Focus Bar**. These buttons allow you to switch between the **Company** and **Project** focus, or use the Magnifying Glass button to search and select available projects.
Radio buttons allow you to choose one (1) option; Checkboxes allow you to choose multiple options.

- **Radio buttons** | Circular; allows for only one (1) option to be selected

- **Checkboxes** | Rounded Squares; allows for multiple options to be selected
Be aware of the current **Project Record Status**; it controls the project record’s behavior and available options.

- **Record is Active**
  - Record behaves as **Read-Only**
  - Record must be placed into **Revision** in order to edit the project's fields and attributes

- **Record is in Revision**
  - Record is **Editable**
  - Record should be returned to **Active** status when changes are not actively being performed
Section 3 | Creating a Project
# Creating a New Project

What will we review?

<table>
<thead>
<tr>
<th>Initiate</th>
<th>Setup</th>
<th>Execute</th>
<th>Manage</th>
<th>Closeout</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Capital Chartstring (if applicable)</td>
<td>CURRENT</td>
<td>When applicable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Project <strong>NEW</strong></td>
<td>FACILITIES CONNECT</td>
<td>Always</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Apply Naming Conventions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Select between Capitalized or Non-Capitalized</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Apply Project Chartstring (if applicable)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Add Location Information</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add NU Facilities Project Contacts</td>
<td>FACILITIES CONNECT</td>
<td>Always</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apply Large / Small Project Template <strong>NEW</strong></td>
<td>FACILITIES CONNECT</td>
<td>Always</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Draft / Save Project <strong>NEW</strong></td>
<td>FACILITIES CONNECT</td>
<td>Always</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Creating a New Project

## What will we review?

<table>
<thead>
<tr>
<th>Step</th>
<th>Where</th>
<th>Requirement</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Primary Customer Contact</td>
<td>FACILITIES CONNECT</td>
<td>When applicable</td>
<td>Project Initiation</td>
</tr>
<tr>
<td>Add Supplemental Project Information</td>
<td>FACILITIES CONNECT</td>
<td>Always</td>
<td>Project Initiation (update as necessary)</td>
</tr>
<tr>
<td>• Select Project Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Select Project Classification</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Select Project Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add Project Scope</td>
<td>FACILITIES CONNECT</td>
<td>Always</td>
<td>Project Initiation (update as necessary)</td>
</tr>
<tr>
<td>• Add Scope Description</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Enter Site Information</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Select Project Impacted Area</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Step 1

Access the **Create a New Capital Project Form**
Step 1

Access the Create a New Capital Project Form
Access the **Create a New Capital Project Form**

![Create a Capital Project Form](image-url)
Apply **Project Name** and **Date Information**

![Screenshot of a project creation form](image_url)
### Apply **Project Name** and **Date Information**

<table>
<thead>
<tr>
<th>IMPORTANT CONCEPT</th>
</tr>
</thead>
</table>

**Naming a Project**

The name of project in Facilities Connect must adhere to the following convention:

- Building/Area Name + Sub-Location + Description + Effort + Year
Apply **Project Name** and **Date Information**

### Naming a Project

The name of project in Facilities Connect must adhere to the following convention:

- **Building / Area Name**
- **Sub-Location**
- **Description**
- **Effort**
- **Year**

**EXAMPLE**

- **Abbott Hall**
- **Second Floor**
- **MFA Teaching Studio**
- **Buildout**
- **2018**
Apply **Project Name** and **Date Information**

**EXAMPLE**

<table>
<thead>
<tr>
<th>Naming a Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resulting Project Name / Project Reporting Name:</td>
</tr>
</tbody>
</table>

Abbott Hall Second Floor MFA Teaching Studio Buildout 2018
Step 3

Select Project Category
Step 3

Select Project Category

[Image of the Northwestern FACILITIES CONNECT interface showing the Create a Capital Project section with details on selecting the Project Category. The selected category is highlighted with a capitalized option.]
Add Project **Chartstring** (Capitalized Only)
Add Project Primary Location
### Step 5

**Add Project Primary Location**

#### Northwestern FACILITIES CONNECT

- **Home**
- **Portfolio**

#### Create a Capital Project

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

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

#### Details

- Project Type
- Project Status
- Project Website
- Project Category
- Accounting Cost Center
- Primary Customer
- Primary Location
- Location Path

<table>
<thead>
<tr>
<th>Campus</th>
<th>Building</th>
<th>Floor</th>
<th>Wing</th>
<th>Name</th>
<th>Type</th>
<th>Hierarchy</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evanston Campus</td>
<td>1800 Sherman</td>
<td>06</td>
<td>Containe</td>
<td>Containe</td>
<td>Containe</td>
<td>Location/Evanston Campus 1800 Sherman/06/950</td>
<td>Active</td>
</tr>
<tr>
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<td>06</td>
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Step 5

Add Project Primary Location

INTRODUCTION TO FACILITIES CONNECT AND CREATING A PROJECT

Section 3 | Creating a New Project
Step 5

Add Project Primary Location
Add Project Primary Manager
Add Project Primary Manager
Step 6

Add Project Primary Manager

### Northwestern | FACILITIES CONNECT

**INTRODUCTION TO FACILITIES CONNECT AND CREATING A PROJECT**
Step 7

Add Project Director

![Image of Northwestern Facilities Connect interface showing the creation of a new project and adding a project director]
Step 8

Create Draft
Step 9

Apply Project Template

INTRODUCTION TO FACILITIES CONNECT AND CREATING A PROJECT
Step 9
Apply **Project Template**

---

**Northwestern | FACILITIES CONNECT**

**INTRODUCTION TO FACILITIES CONNECT AND CREATING A PROJECT**

### Step 9: Apply Project Template

#### Section 3: Creating a New Project
Step 9

Apply Project Template
Save Project
Create a New Project

Exercise

Now that we have seen the process of Creating a New Project, let’s practice together in Facilities Connect.

Open your laptop and enter the following address in your browser:
https://northwestern-qa.tririga.com
Conclusion

Wrap Up

This concludes Course 2: Introduction to Facilities Connect and Creating a Project

Thank you for your participation!

The next course in the Facilities Connect – Project Management series is:

Course 3: Updating and Managing Projects in Facilities Connect
## Conclusion

### Upcoming Courses + Support Calendar

<table>
<thead>
<tr>
<th>WK</th>
<th>MONDAY</th>
<th>TUESDAY</th>
<th>WEDNESDAY</th>
<th>THURSDAY</th>
<th>FRIDAY</th>
</tr>
</thead>
</table>
| 1  |        |         | **2** Intro to Facilities Connect and Creating a Project  
10-11:30am (Norris – 205A Louis North) | Open Lab  
2-4pm (EV – 2020 Ridge) | **3** Updating and Managing a Project in Facilities Connect  
10-11:30am (Norris – 208 Armadillo) |
| 2  |        | Open Lab  
9-11am (EV – 2020 Ridge) | **4** Project Financial Management in Facilities Connect  
10-11:30am (Norris – 208 Armadillo) | Open Lab  
9-11am (EV – 2020 Ridge) | Open Lab  
2-4pm (EV – 2020 Ridge) |
| 3  | Open Lab  
2-4pm (EV – 2020 Ridge) | Open Lab  
2-4pm (EV – 2020 Ridge) | Open Lab  
2-4pm (EV – 2020 Ridge) | Open Lab  
2-4pm (EV – 2020 Ridge) | Open Lab  
2-4pm (EV – 2020 Ridge) |

*Note: Days and times are subject to change.*
## Conclusion

### Feedback and Questions

<table>
<thead>
<tr>
<th>FEEDBACK / Q&amp;A</th>
</tr>
</thead>
<tbody>
<tr>
<td>We would like to hear your feedback on today's course and your questions regarding Facilities Connect. Your input will help guide our ongoing Facilities Connect training and support efforts.</td>
</tr>
<tr>
<td>Please send your feedback and questions to <a href="mailto:FPMFeedback@northwestern.edu">FPMFeedback@northwestern.edu</a></td>
</tr>
</tbody>
</table>