Job Guide #1

PM Module Basic Navigation / Project Walkthrough
DOCUMENT SUMMARY

This job guide provides an overview for basic navigation of the Facilities Connect Project Management module (PM Module), as well as project information accessible to all PM Module user groups.

The purpose of this document is to serve as guided reference and/or new hire training for navigating the Facilities Connect PM Module and viewing individual project information.

Note: The Facilities Connect screen shots in this guide were taken as the Project Manager role. Exact screen views and options may differ slightly depending on your individual user role.

VERSION INFORMATION (THIS DOCUMENT)

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<th>Version</th>
<th>Release Date</th>
<th>Action</th>
<th>Owner</th>
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<td>1.0</td>
<td>3/14/2019</td>
<td>Created</td>
<td>NU Facilities</td>
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Note: This is the original version of the document; content within represents delivered system functionality at PM Module go-live (11/27/2018), and has been verified as up-to-date of this document's release (3/14/19)

REVISION HISTORY

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Most Recent → 1.0 3/14/2019 Created NU Facilities
Part 1

Basic Navigation

This section will highlight the primary screens of the Facilities Connect PM Module, and the information, options, and functionality accessible on each screen.
To begin, access Facilities Connect and arrive on the Facilities Connect Home Screen

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

- **Home Tab (selected)** – Provides general access in which the user may:
  - Create a New Project
  - Access and modify his/her existing projects
  - Access and view all existing NU projects
  - View the ‘My Projects’ queue and directly access his/her existing projects by current phase
  - Access pre-configured Project Reports

- **Portfolio Tab** – Provides additional access in which the user may:
  - View external companies (e.g. vendors)
  - Add and manage external contacts (e.g. vendor contacts)
B. The Focus Bar allows the user to toggle the screen view / available options, and provides a quick link for project search functionality (the selected focus will be highlighted in light purple)

- **Company Focus (selected)** – Provides a view and functionality across a user’s portfolio of projects
- **Project Focus** – Provides a view and functionality for managing within a selected project
- **Magnifying Glass (Search)** – Allows the user to search and select a project for Project Focus
C. The Related Links - Projects portlet contains links to the following:

- **Create a Capital Project** – Launches the form to initiate a new project
  
  *Note:* This option is not available for the Support Team Member user role

- **My Capital Projects** – Provides a clickable list of all projects associated with the current user

- **All Capital Projects** – Provides a clickable list of all NU Facilities projects (read-only access for those projects which the user is not associated)

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

E. The Project Reports portlet provides a collection of pre-configured, sortable and filterable project management module reports
F. When a project is viewed in **Project Focus**, new options / actions will become available.

G. The **Project Name** will appear in the space immediately to the left of the Focus Bar, indicating that available options / actions are applicable to the selected project.

H. The **Related Links – Capital Project Progress** portlet provides several clickable options for managing the selected 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 punch list 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
The Portfolio Portal Tab provides new options including the ability to search External Companies and update External Contacts.

I. The Organizations portlet contains a clickable link to search and view External Companies (e.g. vendors).

J. The People portlet contains a clickable link to view and update External Contacts (e.g. vendor contacts).

- Once an External Contact has been added and associated with an External Company, he/she can be added to a project (via the project’s Contacts tab), and classified in a specific role (e.g. General Contractor).
Part 2

Project Walkthrough

This section will walkthrough the information available within a selected project, including how information is organized and where it is located.
Within a project, the **General** tab organizes basic project information and details in the following sections:

**A. General**
- **Date** is the project creation date
- **Name** contains the project name
- **Project Reporting Name** defaults to project name in the **Name** field, but can be changed to an alternate project name (e.g. a sponsor / donor naming rights)

**B. Details**
- **Project Type** identifies the university function served by the project (e.g. academic, athletic, administrative)
- **Project Classification** identifies the work classification of the project (e.g. renovation, new construction, systems replacement)
- **Project Status** indicates the current status of the project (e.g. active, future, on-hold)
- **Project Phase** displays the current phase of the project (e.g. design, construction, closeout)
- **Project Category** identifies if the project is Capitalized (i.e. has a capital project chartstring) or Non-Capitalized (i.e. does not have a capital project chartstring)
- **Chartstring (if applicable)** contains the capital chartstring for the project

**IMPORTANT**
C. Primary Customer Contact
- **Primary Customer Contact** displays the primary NU customer contact for the project (as designated by the Project Manager) with the individual’s contact information.

D. Primary Location
- **Primary Location** displays the primary project location on campus for the project (e.g., building, floor, lot).

**Note:** In cases such as a new construction or campus infrastructure project, where the location is not clearly defined in Facilities Connect, a generic location such as Evanston Campus or Chicago Campus may be used in to represent the project’s Primary Location.
The Scope tab organizes details about project scope, site information, impacted area(s), and parking buildout information (if applicable).

E. Scope
- **Scope Description** is a free text field for the Project Manager to summarize project scope, assumptions, and other important notations.

F. Site Information
- **Site Information Fields** display area metrics for the project site and impacted areas; these values auto-populate in Facilities Connect based on project inputs, and can be adjusted by the Project Manager to reflect actuals.

G. Project Impacted Area
- **Project Impacted Area(s) List** outlines the physical space(s) designated by the Project Manager as ‘Impacted’ by work occurring on the selected project.

H. Parking
- **Parking Information Fields** display design information and volume metrics for the parking component of a project (if applicable).
The Schedule tab organizes project schedule details in terms of both individual project phases and overall project duration.

I. Summary
- Summary contains the project's planned and actual start/end dates, as well as calculated start/end dates based on individual project phases and dependencies outlined below.

J. Project Tasks Gantt
- Project Tasks Gantt provides a visual representation of the project calendar (in the form of a Gantt chart), showing individual project phase durations and dependencies.

IMPORTANT

SCHEDULE TAB
K. Project Tasks
- Project Tasks provides a tabular view of project phases, highlighting phase start/end dates and percent complete information.

L. Schedule Assumptions
- Schedule Assumptions is a free text field for the Project Manager to summarize any assumptions (e.g. deadlines, risks / delays, considerations, etc.) which may be either incorporated or impactful to the project schedule.
On the Budget tab, you are able to view detailed project financial information, organized across several sections of the Capital Project Form.

For Capitalized projects, financial information displayed in Facilities Connect is automatically received and refreshed via daily updates from NU Financials (system of record).

The Summary section provides a high-level project financial snapshot, including:

**M. Budget group**
- **Original Budget** is the original budgeted amount for the project, established during the creation of the project’s capital chartstring.
- **Budget Changes** represents the net change to project budget (i.e., sum of budget increases and decreases) following the creation of the original project budget.
- **Current Budget (a+b)** is the project’s current budget; it represents the sum of the Original Budget and Budget Changes line items.

**N. Commitments group**
- **Commitments** represents the sum of all vendor purchase orders that have been created for the project.
- **Invoices Paid** represents the sum of all vendor invoice payments that have been released for the project.
- **Encumbrance Balance (d-e)** is the current balance of encumbrances (i.e., Commitments less Invoice Payments) for the project.

**IMPORTANT**
The Summary section provides a high-level project financial snapshot, including:

**O. Incurred group**
- Invoices Paid represents the sum of all vendor invoice payments that have been processed and released for the project
- Journals / Job Cost represents the sum of all NU Facilities internal costs (e.g. shop time, PM Fees, etc.) billed to the project
- Total Incurred (e+g) represents the combined total of internal and external costs that has been spent on the project

**P. Forecast group**
- Allowance for PM Fee (%f) captures the project’s currently unrealized, but expected project management fees, based on project Encumbrance Balance and user-entered project management fee percentage
- Uncommitted Budget (c-f-h-i) represents the portion of the project’s Current Budget that is not committed as a current or expected project cost

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**IMPORTANT**

- **Budget Code Structure**
  - **Budget**
    - **a. Original Budget**
      - $1,800,000.00 US Dollars
    - **b. Budget Changes**
      - $5.00 US Dollars
    - **c. Current Budget (e+g)**
      - $1,800,000.00 US Dollars

- **COMMITMENTS**
  - **d. Commitments**
    - $1,478,869.57 US Dollars
  - **e. Invoices Paid**
    - $1,315,849.87 US Dollars
  - **f. Encumbrance Balance (d-e)**
    - $163,019.70 US Dollars
  - **g. Journals / Job Cost**
    - $505,789.69 US Dollars
  - **h. Total Incurred (e+g)**
    - $1,421,639.56 US Dollars

- **FORECAST**
  - **i. Allowance for PM Fee (%f)**
    - $6,520.79 US Dollars
  - **j. Uncommitted Budget (c-f-h-i)**
    - $208,819.95 US Dollars
The **Job Cost Billing** section allows applicable users to enter the project management fee (PM Fee) for the project.

**Q. PM Markup** is the PM Fee for the project, entered as a percentage.

**Note:** When entering the PM Fee percentage, do not include a percent sign in your entry.

Here are some examples of how to enter the PM Fee:

- Enter "4" for a 4% PM Fee
- Enter "3.5" for a 3.5% PM Fee

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### IMPORTANT

**CAPITAL PROJECT FORM > BUDGET TAB**

![Image of Budget Tab](image-url)

**Budget Code Structure:** 812-4600000-80047077-01

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<thead>
<tr>
<th>Budget</th>
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<td>Budget Changes</td>
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<tr>
<td>Current Budget</td>
<td>$1,800,000.00</td>
<td>US Dollars</td>
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</tbody>
</table>

**COMMITMENTS**

- **a. Invoices Paid**
  - $1,478,869.57 USD
- **b. Encumbrance Balance (d-e)**
  - $163,019.70 USD

**INCIRED**

- **a. Invoices Paid**
  - $1,315,849.87 USD
- **g. Journals/Job Cost**
  - $105,789.69 USD
- **h. Total Incurred (e+g)**
  - $1,421,639.56 USD

**FORECAST**

- **i. Allowance for PM Fee (%)**
  - $6,520.79 USD
- **j. Uncommitted Budget (c-h-i)**
  - $208,819.95 USD
The **Current Budget Balance** section provides project budget and cost information at the account code level.

R. **Current Budget Balance** is a sortable and filterable table containing budget and cost details for each project account code. **Note:** You may click on any account code line item in the table to view additional details.

The **Cost Overview** section provides a space to capture any notes or assumptions regarding project financial information.

S. **Cost Overview** is a free text field, allowing the Project Manager to record any notes or assumptions regarding project financial information.
The Project Budget section provides a record of project budget updates; this includes the creation of the original project budget as well as budget changes.

**T. Project Budget** is a log of project budget updates, including the date of each update.

**Note:** You may click on any line item in this section to view additional details, including amounts by project account code.

**Important:** For Capital projects, do not use the Add button in this section. All updates to Project Budget are automatically received and refreshed via daily updates from NU Financials.
On the Procurement tab, you are able to view project purchase order, invoice, and payment release information, organized in two (2) sections of the Capital Project Form.

**Note:** On this tab, always be aware of the number of items present within each section (shown on the Information Bar).

As a default, Facilities Connect will display the first ten (10) items in each section. This can be adjusted by changing the number of visible records via the Show dropdown on the right side of each section.
The Contract and Purchase Orders section provides a list of project purchase orders, organized by vendor name and purchase order ID number.

**U. Contracts and Purchase Orders** is a sortable and filterable table containing budget and cost details for each project account code:
- **Vendor Company Name** – name of the vendor as indicated on the new purchase order form
- **ID** - purchase order ID number
- **Type** - indicates the record type of the individual line item
- **Date** – date of purchase order creation (or last update to PO amount)
- **PO Amount** – total amount of the purchase order (includes initial amount and any changes)
- **Total Invoice** – total of NU invoice payments applied to the purchase order

**Note:** You may click on any purchase order line item in the table to view additional details.
The Billing section provides a list of project invoices and payment release information.

V. Billing is a sortable and filterable table containing invoice (PO and journal) and payment information:
- **ID** – ID number for the invoice or payment release
- **Type** – indicates the record type of the individual line item
  - PO Invoice – represents an invoice of charges corresponding to a vendor PO
  - Journal Invoice – represents an invoice of charges which is internal in nature (e.g. NU Facilities shop time, PM Fees, etc.)
  - Payment Release – a record indicating that a payment has been released for a corresponding PO or Journal invoice
- **Date** – date of the invoice or payment release
- **Name** – the system-created name for the invoice or payment release record
- **Status** – indicates the status of the invoice or payment release

**Note:** You may click on any invoice or payment release line item in the table to view additional details.
The **Contacts** tab organizes internal and external project contacts, including project roles and contact information.

**W. Contacts**
- **Contacts** is a listing of internal and external project contacts, maintained by the Project Manager, and includes each individual's project role and contact information.

**X. Contacts Description**
- **Contacts Description** is a free text field for the Project Manager to summarize any important information or notations regarding project contacts.
The Notes & Documents tab is a centralized repository for important project notes and documentation.

Y. Comments
- Comments is a rolling list of date-stamped notations, editable by all user roles able to access the project. Use of the field is at the user's discretion, but it can be used for memorialization of important project events such as milestones, key decisions, project risks, etc.

Z. Related Documents
- Related Documents is a file repository for the storage of important project documentation and/or media files (e.g. contracts, drawings, designs, photos). This section includes an upload utility (via the “Upload” button) for searching and selecting files for upload.