Job Guide #2

Creating a New Project
CREATING A NEW PROJECT

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for creating a new project in Facilities Connect.

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)

<table>
<thead>
<tr>
<th>Version</th>
<th>Release Date</th>
<th>Action</th>
<th>Owner</th>
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<tr>
<td>1.0</td>
<td>2/13/2019</td>
<td>Created</td>
<td>NU Facilities</td>
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Notes

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 (2/13/19)

REVISION HISTORY

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Most Recent →
To begin, access the Facilities Connect Home Screen.

**GETTING STARTED**

- **Process**
  - **Important**

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**HOME SCREEN (COMPANY FOCUS)**

**Northwestern | FACILITIES CONNECT**

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

**Project Checklists in Revision**

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<tr>
<th>Created By</th>
<th>Project Name</th>
<th>Status</th>
<th>Checklist Type</th>
<th>Comment</th>
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- **Reminders - Projects**
  - Notices
  - Tasks

- **Reminders - Manage Space Requests**
  - Requests

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

**Process**

- **Welcome, NU Wildcat | Sign Out | About**

**Important**

- **Open in New Window | My Bookmarks**

- **Project Reports**
  - All Progress Reports
  - Current Budget Balance (Summary by PH) Raw
  - Current Budget Balance (Details) Report - All I
  - Project Area Summary
  - Project Financial Summary
  - Project Schedule Summary
  - Project Contact List
  - Scheduled Task Compliance
  - Vendor Characteristics Query
  - Worklist by Primary Project Manager

**Space Information**

- Area by Space Class Parent
- Assigee Space Report
- Building Data
- Building Occupant Contact List
- Building Occupant List
- Department Base Data Report
- Department Base Data Raw
- Room and Department Base Data Only
- Office Area Capacity
- Overall: Total Campus Square Footage
- Space Allocation
- Space Class Count by Building
- Space Report by Building
- Campus Mapping
1) To begin a new project, locate the Related Links – Projects portlet (left side of screen) and click on Create a Capital Project. <<Upon clicking, the Capital Project Form will open in a new window>>
2) Begin on the General tab of the Capital Project Form
   - Create a project name by completing the Name field; the Project Reporting Name field (also a required field) will auto-populate with your Name field entry
     **Note:** All projects must be named using proper project naming conventions. Please refer to the Project Naming Conventions guide on the Facilities Connect website for guidance and more details
     **Tip:** The Date field will pre-populate with the current date, but can be changed by directly editing the date in the associated content box or by clicking on the calendar icon (immediately to the right)

3) Select the appropriate Project Category; use the dropdown arrow to select either Capitalized or Non-Capitalized

**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
4) If **Capitalized** is selected for **Project Category**, the **Chartstring** field will appear on the right side of the screen.

**Note:** All **Capitalized** projects require entry of a project chartstring in order to setup a new project. If you do not have a project chartstring at this time, consult with a **Project Director** on appropriate next steps.

**▼ 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.
5) Use the Magnifying Glass to search and select your project’s chartstring

<<Upon clicking, a new search window will open>>

- All projects must comply with approved Naming Conventions; please refer to the Project Naming Conventions guide on the Facilities Connect website for more details.
6) Use the available Column Headers / Search Fields to sort and filter the list of available chartstrings.

**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.
7) Once you have located the desired chartstring, click on the corresponding Radio Button, and then click OK to select

<<The selected chartstring will now appear in the Chartstring field>>

▼ PROCESS

▼ 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
8) Next, add the project’s Primary Location
   • From the Primary Location section, click the Find button

9) Use the available Column Headers / Search Fields to sort and filter the list for a desired location
   **Note:** If the project’s Primary Location is not a building, lot, or parking garage, use the generic entry of ‘Evanston Campus’ or ‘Chicago Campus’ by searching either value in the Name field

10) Once you have located the desired location, click on the corresponding Radio Button, and then click OK to select
   **Note:** Once the Primary Location has been selected, the Site Address and Project Address sections will populate automatically

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**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
11) Next, add the **Project Primary Manager** and **Project Director** responsible for the project
   - To locate this portion of the form, click on the **Contacts** tab

12) In the **Contacts** section under **Role**, click on **Project Primary Manager**
   <<Upon clicking, the Contact Role Detail for the Project Primary Manager will open as a new window>>

13) In the **Contact Role Detail** window, click the **Find** button
   <<Upon clicking, a new search window will open>>

**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
14) Use the available Column Headers / Search Fields to sort and filter the list of contacts to locate the desired project manager.

15) Once you have located the desired project manager, click on the corresponding Radio Button, and then click OK to select.

▼ 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.
The selected contact and his/her information will now appear in the Contact section of the Contact Role Detail window.

16) Click on the Save & Close button to confirm the selection; the selected contact will now be displayed beside Project Primary Manager in the Contacts section of the Contacts tab.

▼ 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.
The selected Project Primary Manager is now displayed for that role in the Contacts section of the Contacts tab.

17) Next, repeat steps #12-16 to add a contact to the Project Director role.

**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.
Now that both of the required contacts have been added, you are now able to create a draft of the project.

18) Locate and click the Create Draft button on the upper right of the form.

<<Upon clicking, a draft of the project will be saved, and the action buttons (upper right of the form) will change to new options>>

Note: An important, final requirement of new project setup in Facilities Connect is application of a Project Template.

Please continue with the steps #19-22 to ensure a Project Template is properly applied to your project.

**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 apply a Project Template:

19) From the action buttons (upper right of the form), click on the More button

20) Next, click on the Apply Template option (will appear beneath the More button)

<<Upon clicking, a new search window will open>>

21) Select either the Small or Large Project Template
   - Click on the Radio Button for the chosen template
   - Click the Continue button to confirm the selection

22) Now, click on either the Save or Save & Close button to save your project with the applied project template

▼ 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
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)

**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