Job Guide #4

Creating Project Reports

VERSION 1.0
UPDATED 2/8/19

CREATING PROJECT REPORTS

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for locating, creating, and completing weekly project status reports, known in Facilities Connect as Project Reports.

The purpose of this document is to serve as guided reference and/or new hire training on project status reporting functionality available to applicable users in Facilities Connect.

Note: Project Reports is not to be confused with management reporting (i.e. filterable reports) also available in the Facilities Connect Project Management module.

VERSION INFORMATION (THIS DOCUMENT)

Version	**1.0**	Release Date	**2/8/2019**
Owner	**NU Facilities**		
Version 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 (2/8/19)**		

REVISION HISTORY

	Version	Release Date	Action	Owner
Most Recent →	1.0	2/8/2019	Created	NU Facilities
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NOW VIEWING HOME SCREEN (COMPANY FOCUS)

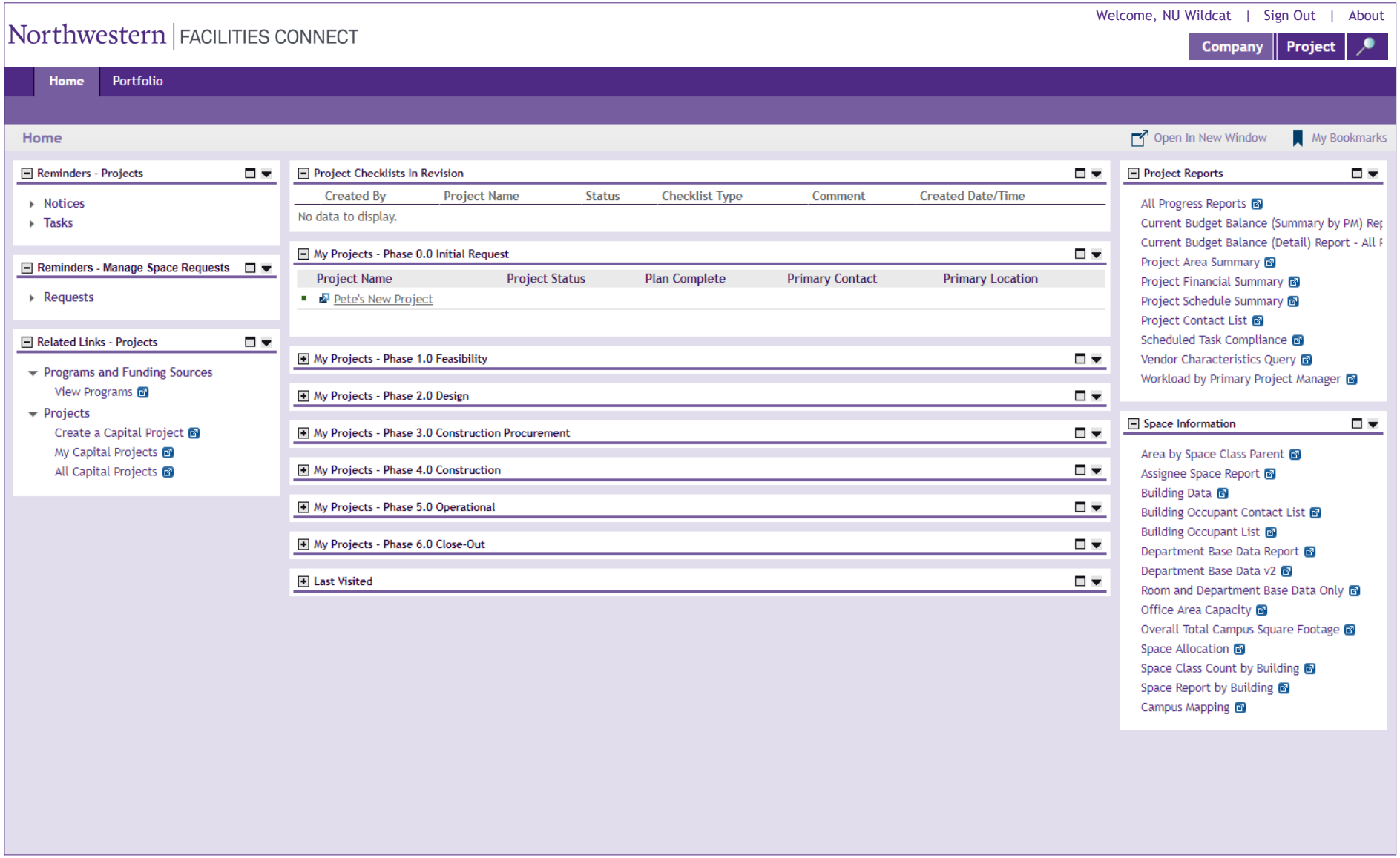
▼ GETTING STARTED

- To begin, access the **Facilities Connect Home Screen**
- In order to create a **Project Report**, the project (for which you are creating the report) **must**:
  a) Have already been created in Facilities Connect
  b) Have a **Project Template** (Large or Small) applied.

  Note: The Project Template only needs to be applied once; if it was already applied at project creation, do not reapply at this stage

▶ PROCESS

▶ IMPORTANT



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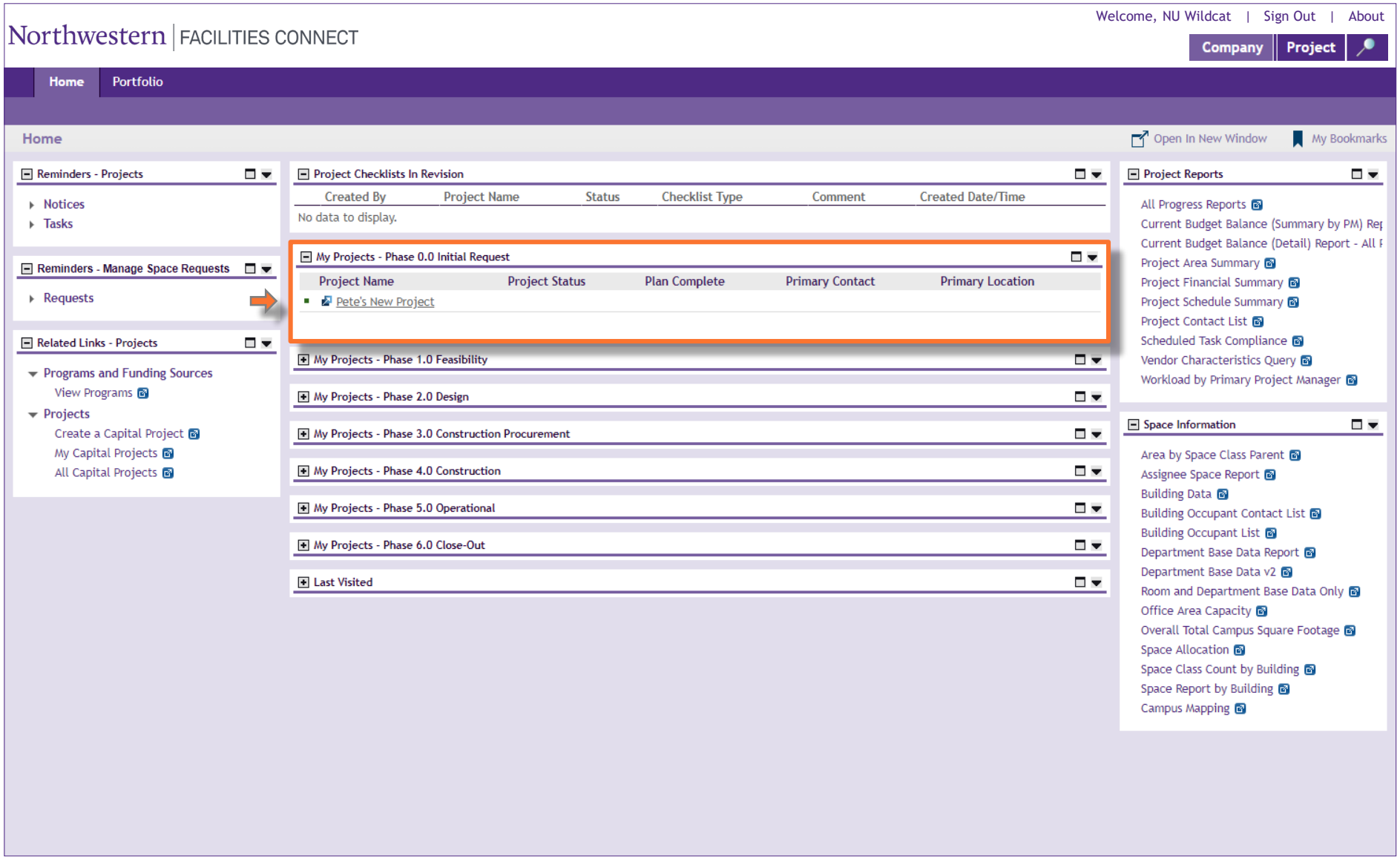
NOW VIEWING HOME SCREEN (COMPANY FOCUS)

▼ GETTING STARTED

- Locate your desired project, contained within the **'My Projects' Phase** portlets (center of **Facilities Connect Home Screen**)

▶ PROCESS

▶ IMPORTANT



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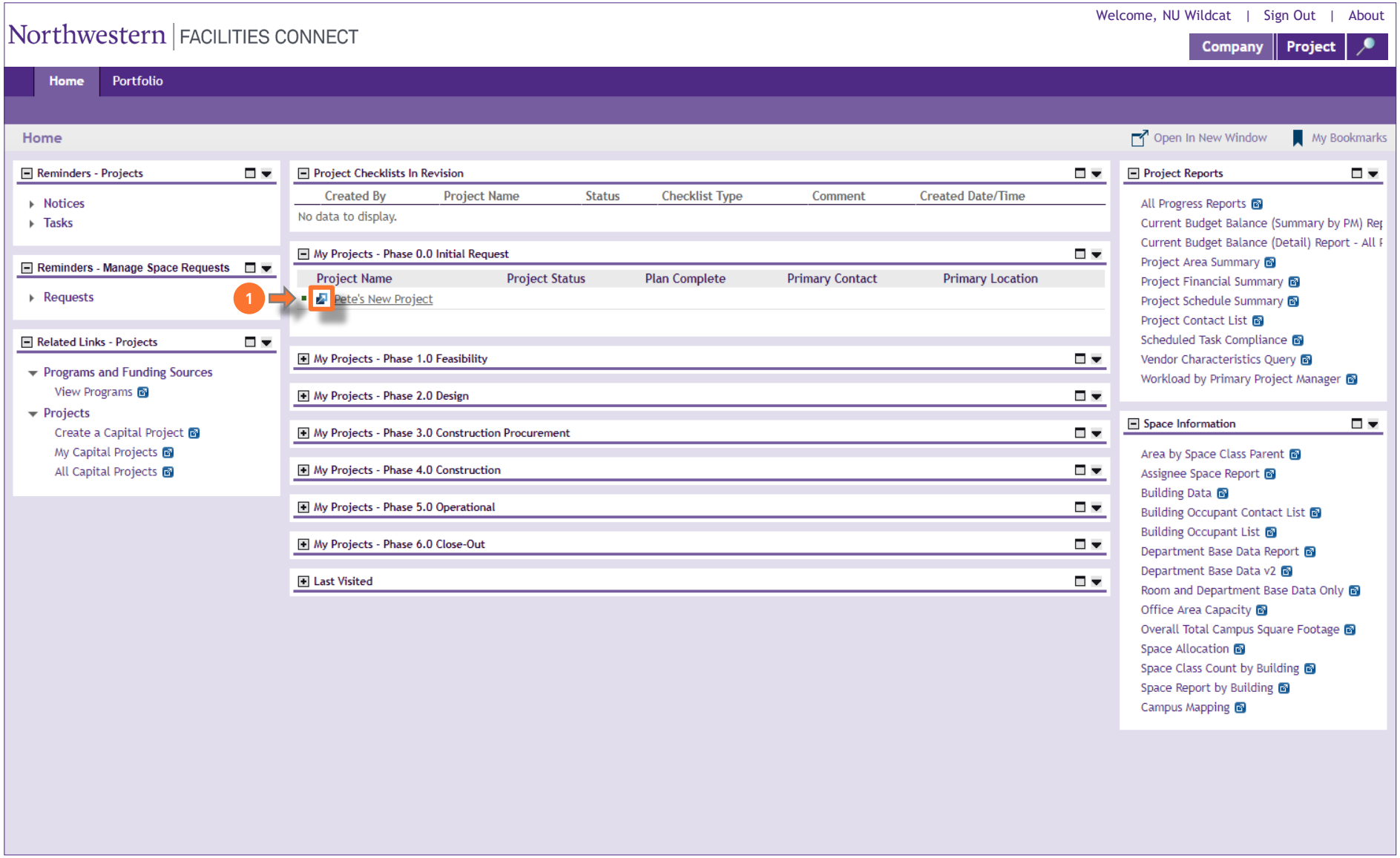
NOW VIEWING HOME SCREEN (COMPANY FOCUS)

▼ PROCESS

1) Select your desired project to open in **Project Focus** by clicking on the **Project Focus Icon** immediately to the left of the project name

*<<Upon clicking, the **Project Focus** for the selected project will appear>>*

▶ IMPORTANT



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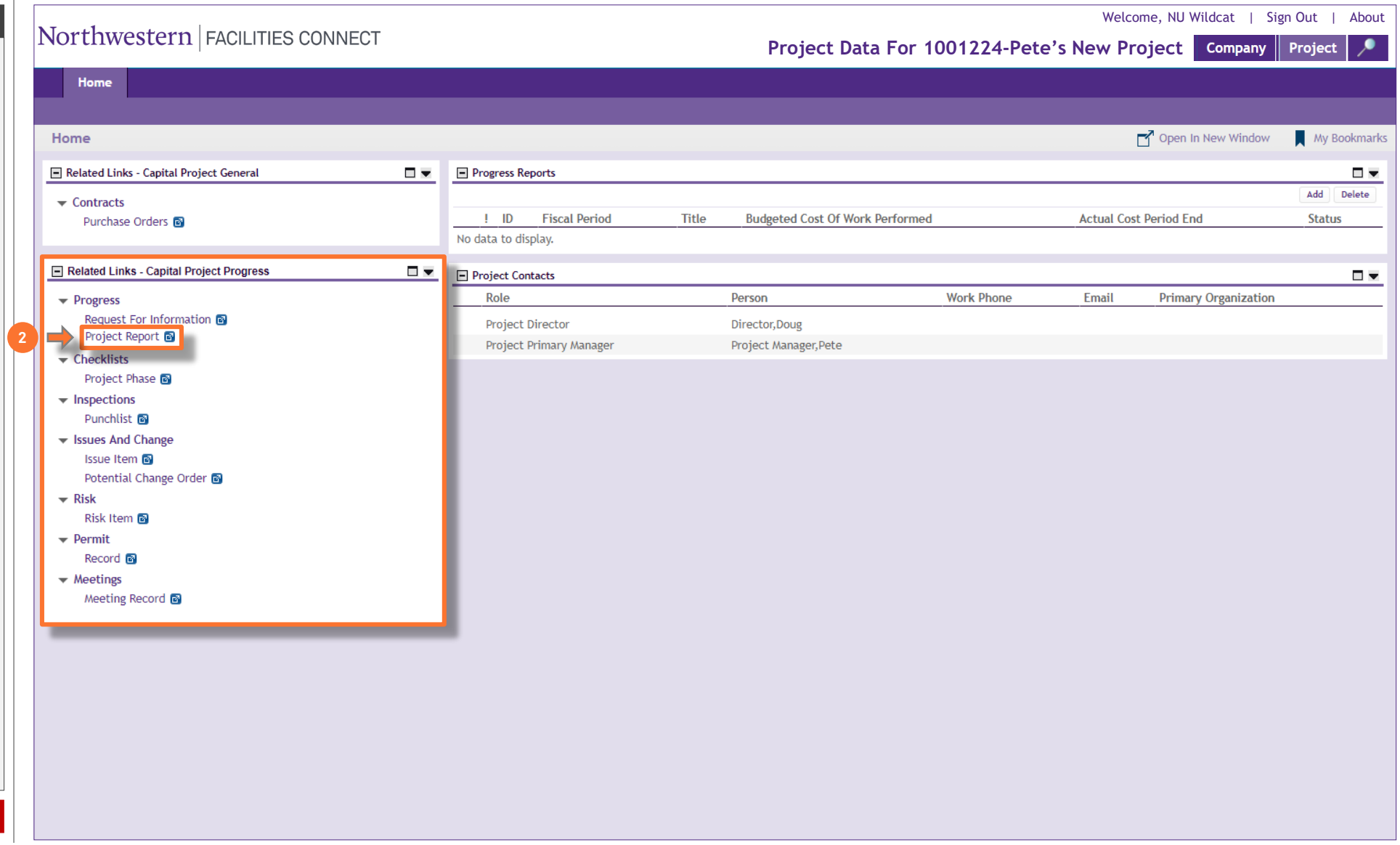
▼ PROCESS

2) From the **Related Links – Capital Project Progress** portlet, click on the option for **Project Report**

*<<Upon clicking, the **Project Report Menu** for the selected project will appear>>*

▶ IMPORTANT



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NOW VIEWING PROJECT REPORT MENU

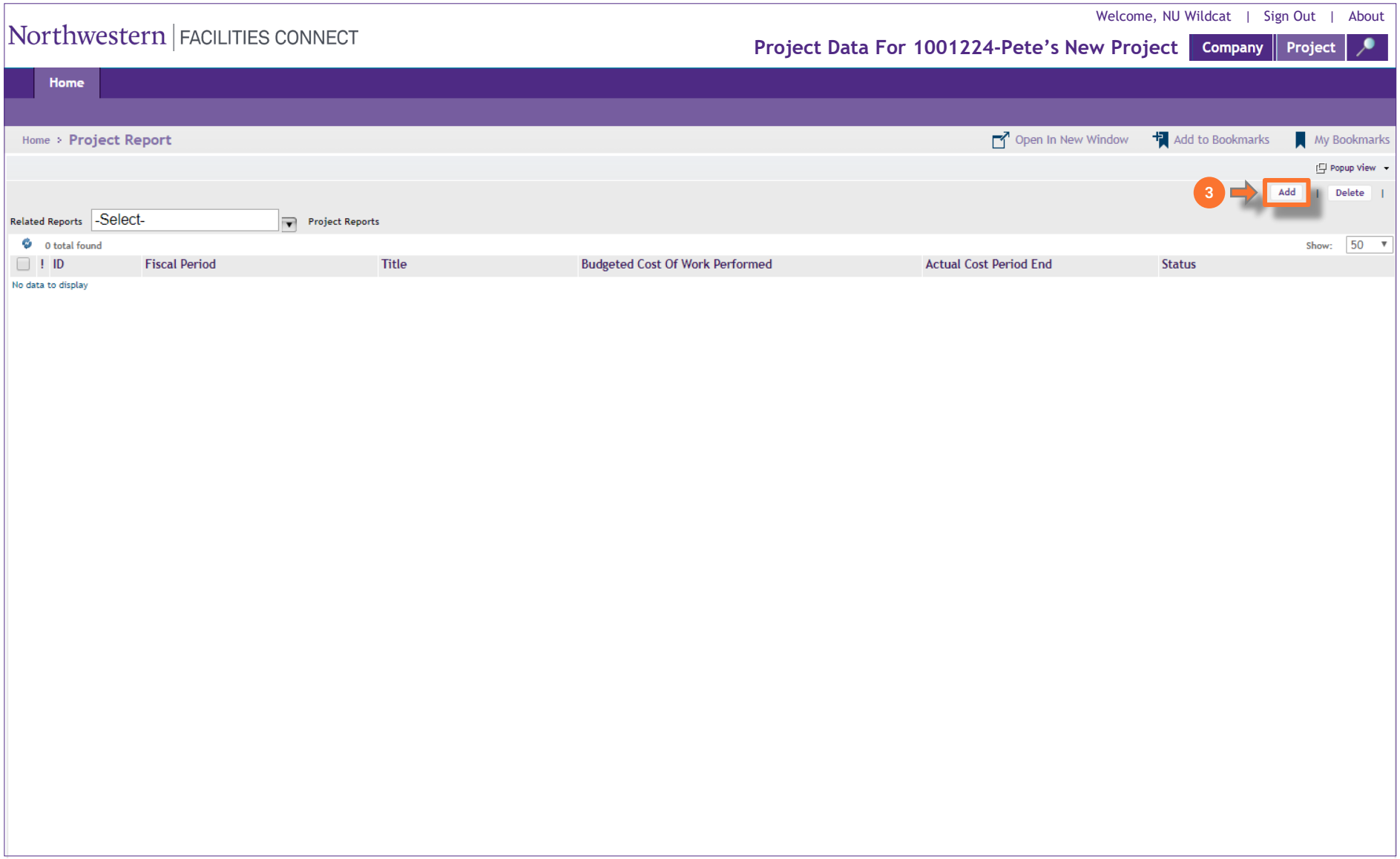
▼ PROCESS

3) From the **Project Report Menu**, click on the **Add** button to create a new project report

*<<Upon clicking, the **Project Report Form** will open as a new window>>*

▼ IMPORTANT

- **Project Reports** should be completed weekly (by COB each Thursday)
- As **Project Reports** are completed on a project, a chronological list of report records will be displayed on this screen



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NOW VIEWING PROJECT REPORT FORM

▼ PROCESS

4) Begin on the **General** tab of the **Project Report Form**

- Add a **Date** for the report; the date field will auto-populate with the current date

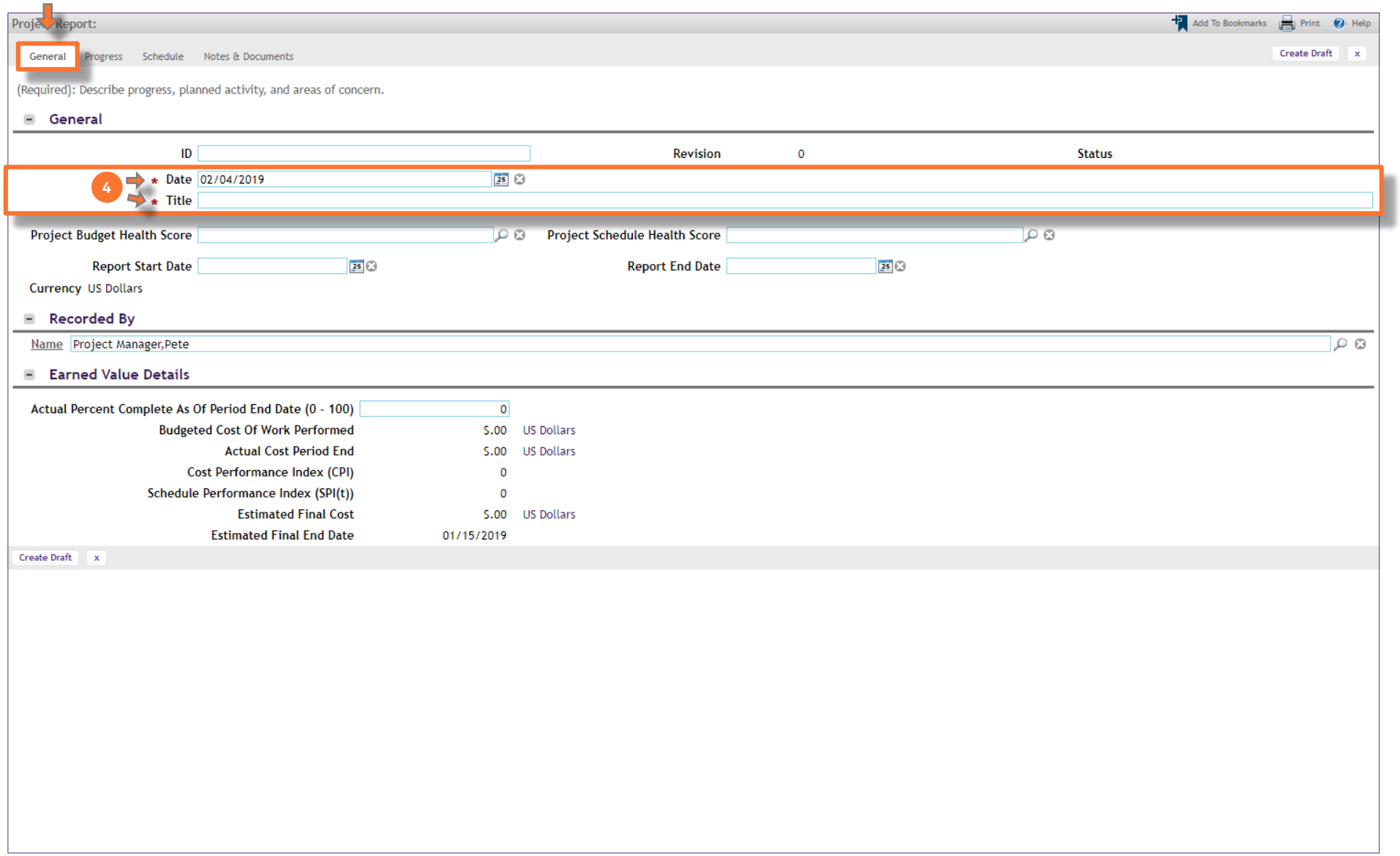
  Note: You may change the Date by typing directly into the field, or by using the calendar icon (right of the field) to find and select

- Add a **Title** for the report

  Tip: It is helpful to use "Week of…" or "Week Ending…" as a common convention for titling your project reports. This will make it easier to locate and distinguish previous reports on the prior menu screen

▼ IMPORTANT

- **Project Reports** should be completed weekly (by COB each Thursday)



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NOW VIEWING PROJECT REPORT FORM

▼ PROCESS

5) Next, select the appropriate **Health Score** for **Project Budget** and **Project Schedule**

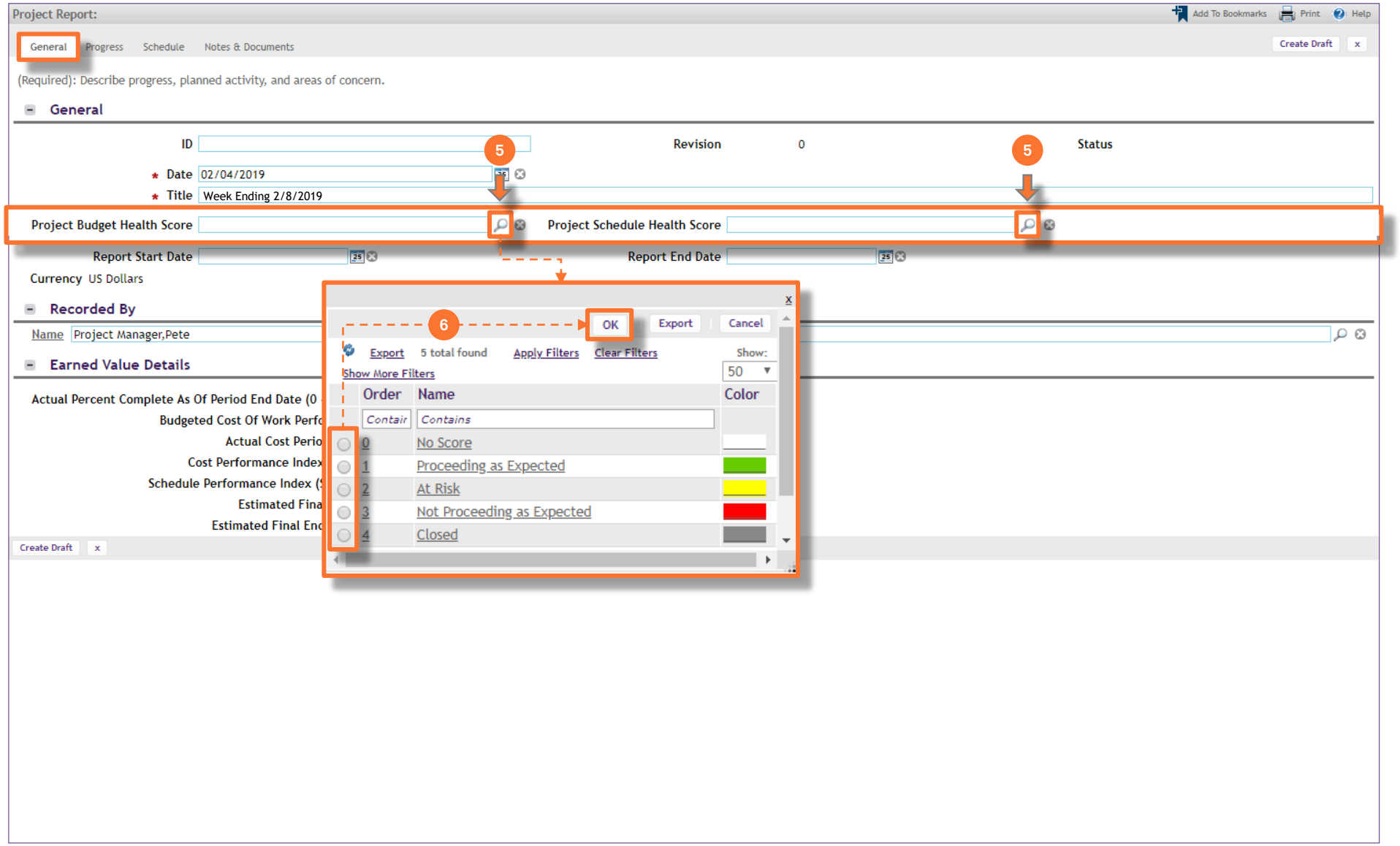
- To view available options, click on the **Magnifying Glass** icon

<<Available options will open in a new window>>

6) Select the desired **Health Score** by clicking the corresponding **Radio Button**. Then click **OK** to confirm the selection

▼ IMPORTANT

- **Project Reports** should be completed weekly (by COB each Thursday)



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NOW VIEWING PROJECT REPORT FORM

PROCESS

7) Update **Report Start and End Dates** by entering the appropriate date(s) or by using the calendar icon (right of each field) to find and select

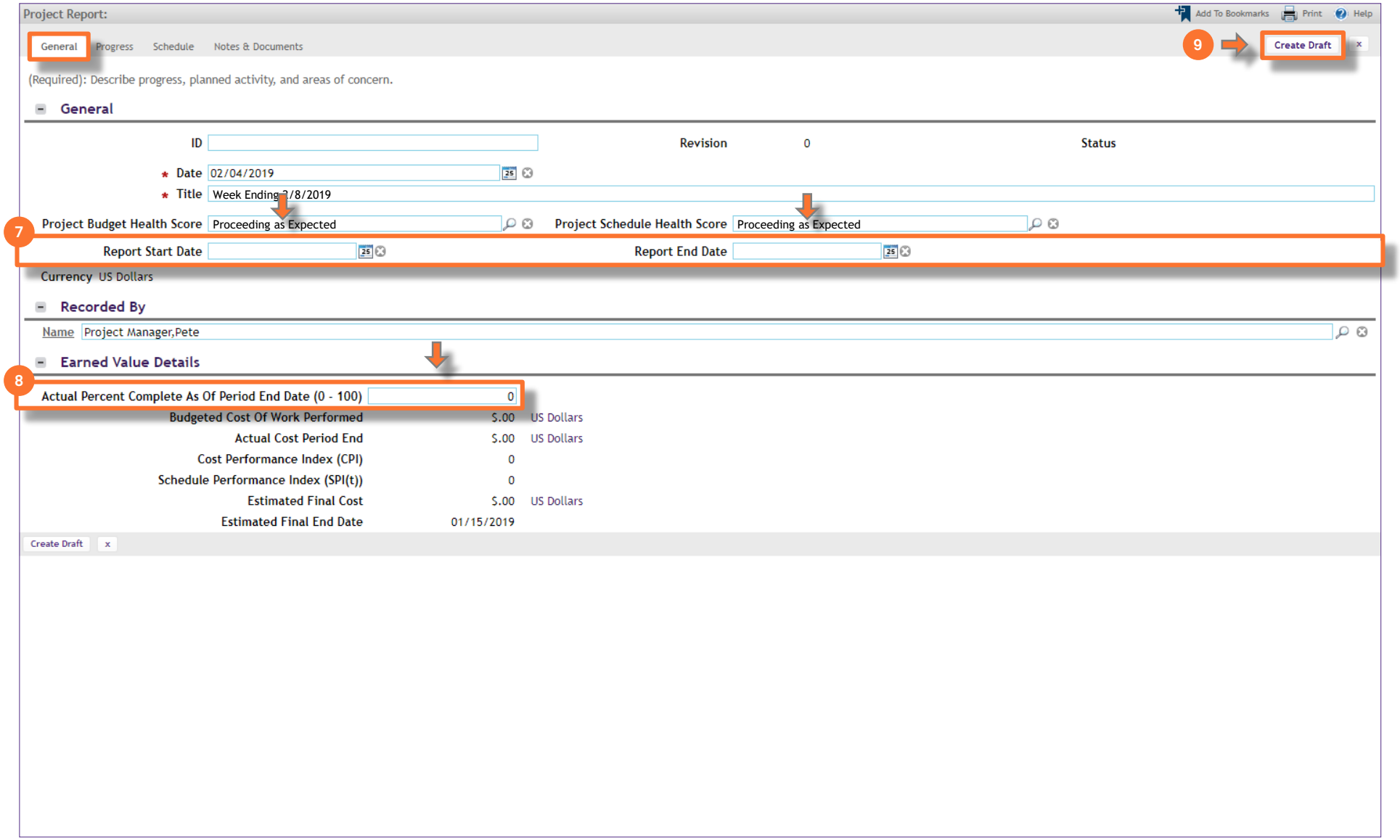
8) Update the **Actual Percent Complete As Of Period End Date (0-100)** field by typing a numerical value of 1-100

   Note: This is a required field; enter your best estimate of the project's overall % complete as a numerical value of 1-100

9) Now that initial required fields are completed, click **Create Draft** to save a draft of the **Project Report**

IMPORTANT

- **Project Reports** should be completed weekly (by COB each Thursday)



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NOW VIEWING PROJECT REPORT FORM

▼ PROCESS

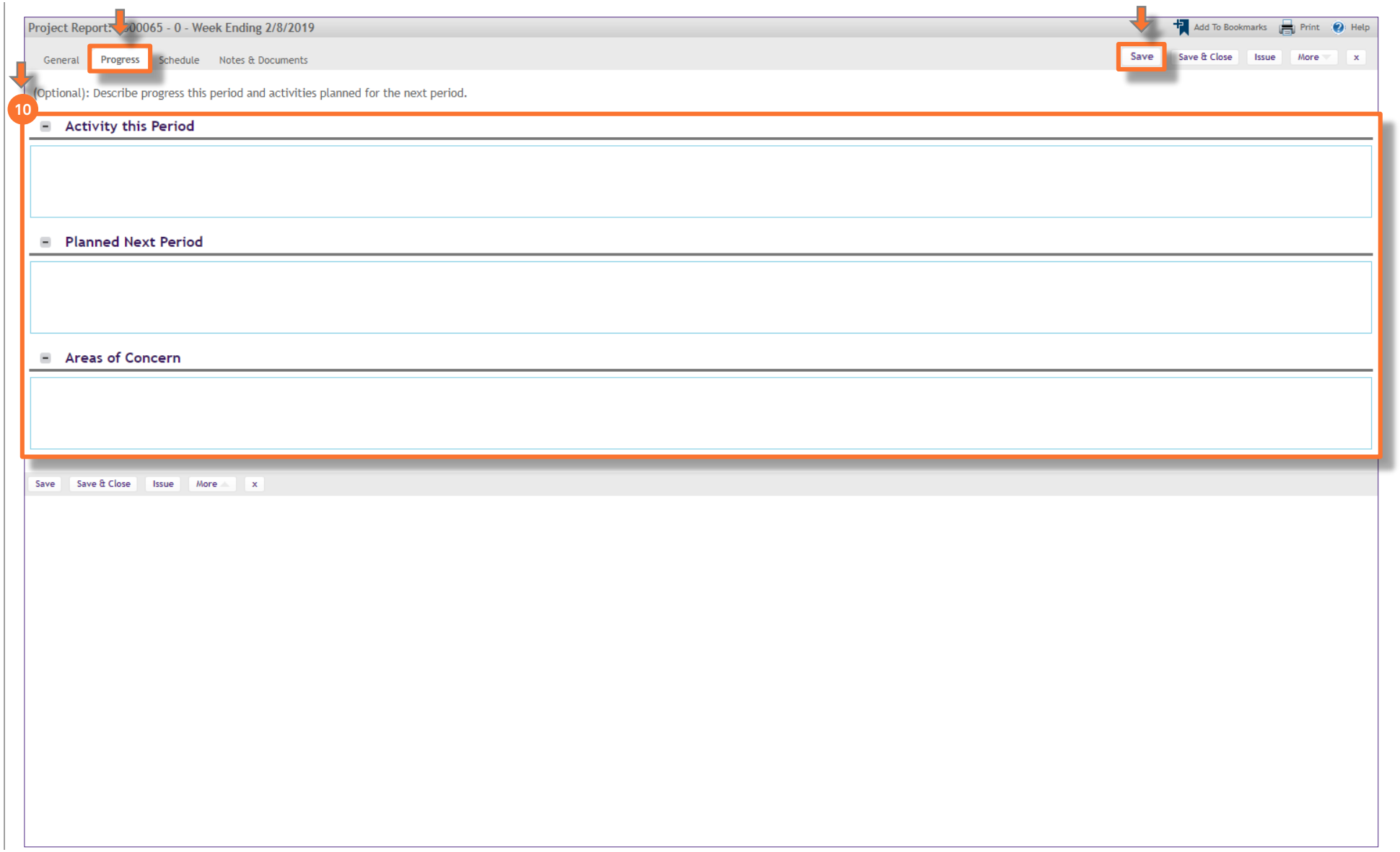
10) Next, move to the **Progress** tab of the **Project Report Form**

- Here, **add project update summaries** for the following dimensions of the project (as they relate to the project report period)
  - **Activity this Period**
  - **Planned Next Period**
  - **Areas of Concern**

Tip: As you summarize your project, use the **Save button** (upper right) to save your work both intermittently and before leaving the **Progress** tab

▼ IMPORTANT

- **Project Reports** should be completed weekly (by COB each Thursday)



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NOW VIEWING PROJECT REPORT FORM

▼ PROCESS

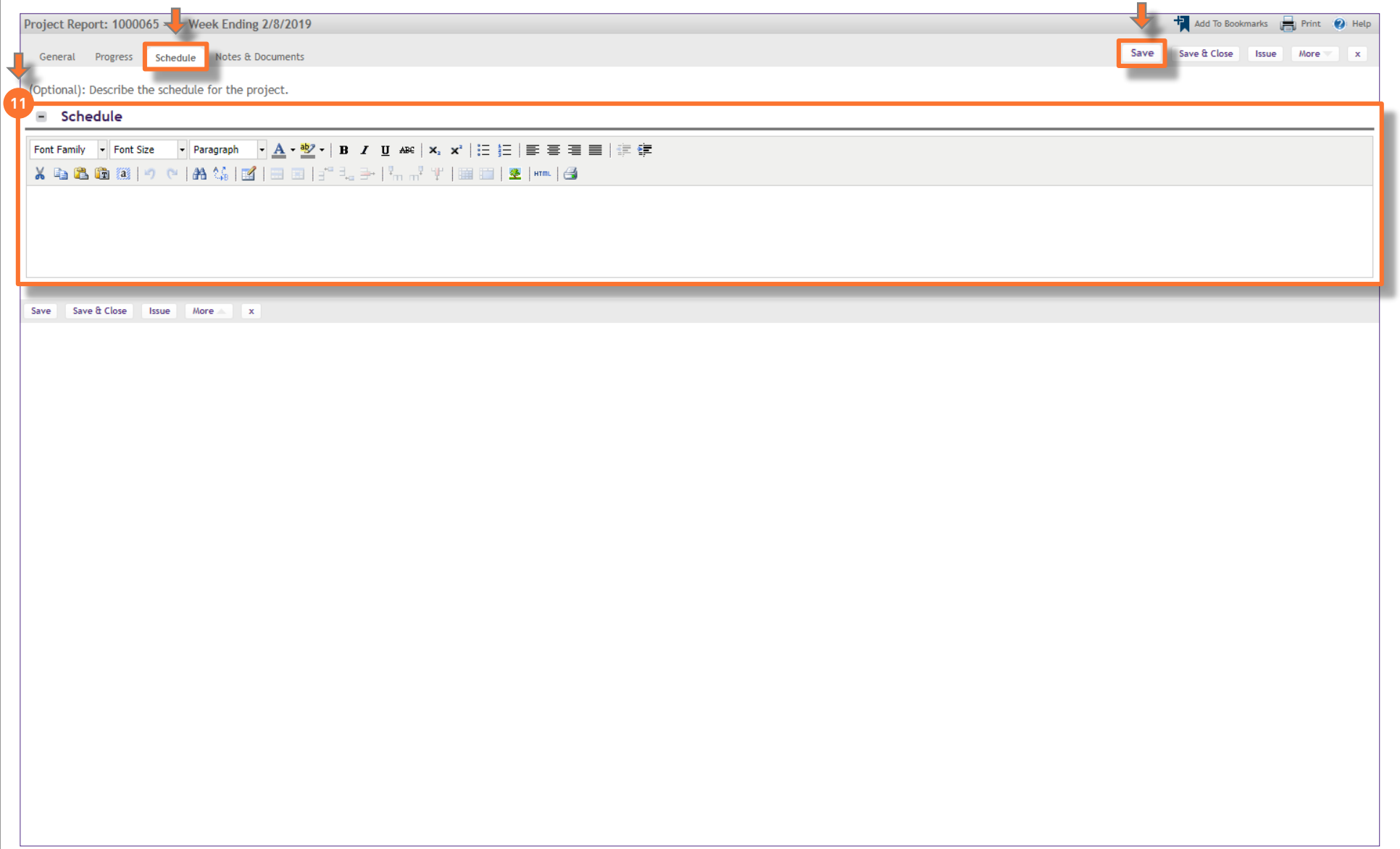
11) Next, move to the **Schedule** tab of the **Project Report Form**

- Here, **add a project update summary** for **Project Schedule** (as it relates to the project report period)

  Tip: As you update your project report, use the **Save button** (upper right) to save your work

▼ IMPORTANT

- **Project Reports** should be completed weekly (by COB each Thursday)



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NOW VIEWING PROJECT REPORT FORM

▼ PROCESS

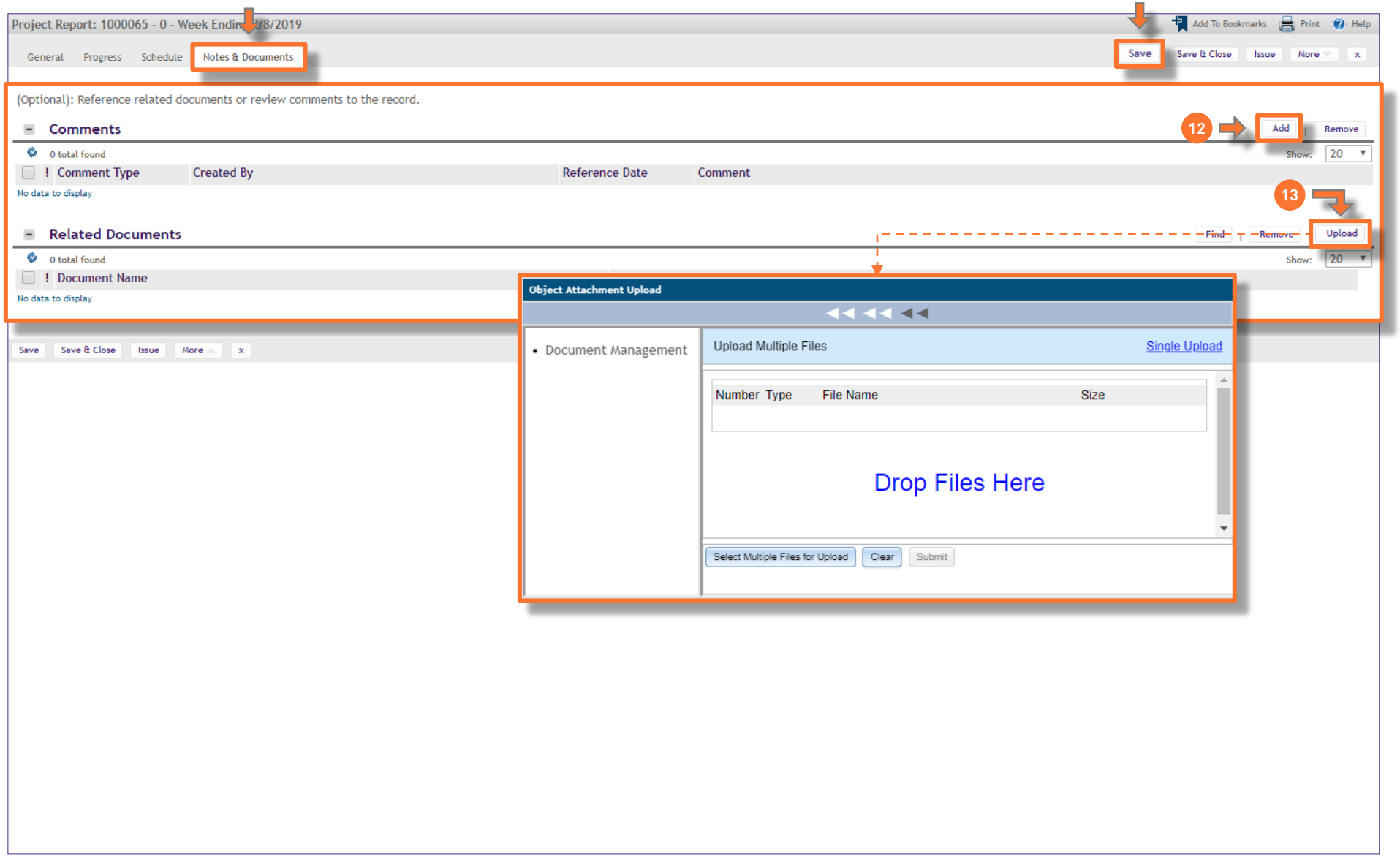
12) Next, move to the **Notes & Documents** tab of the **Project Report form**.
    - *(Optional)* To add any additional project comments, use the **Add** button in the **Comments** section and and complete the **Comment form**

13) To attach any supporting files to the **Project Report**, use the **Upload** button in the **Related Documents** section
    - A file upload utility will open as a new window, and you can use the following to complete the file upload process
        - **Drop Files Here –** Drag and drop files from Windows folders (does not allow direct drop of email attachments)
        - **Select Multiple Files for Upload –** Allows you to browse and select files from Windows folders
        - **Submit –** Completes upload of selected file(s)

    Tip: As you update your project report, use the **Save button** (upper right) to save your work

▼ IMPORTANT

- **Project Reports** should be completed weekly (by COB each Thursday)



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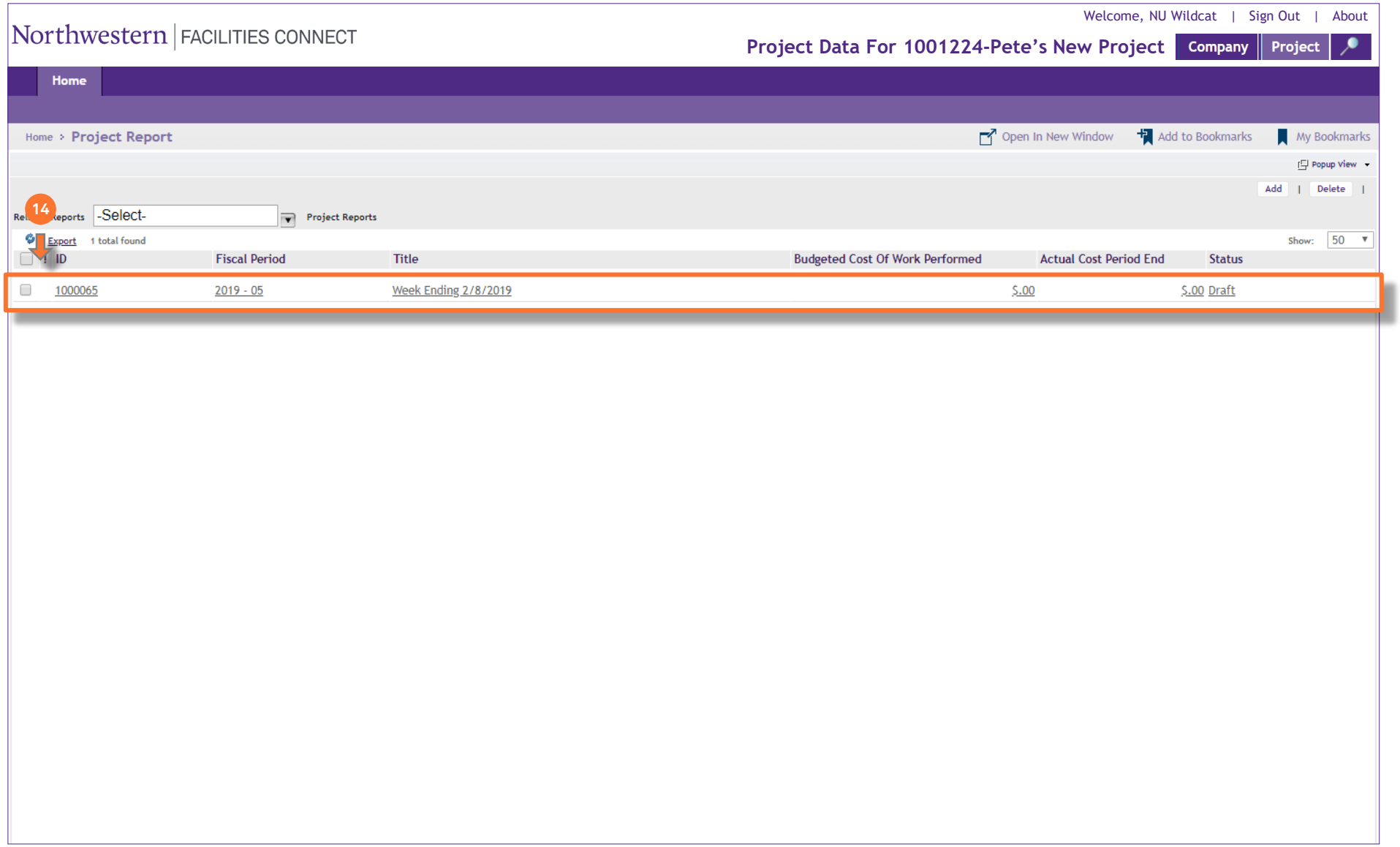
NOW VIEWING PROJECT REPORT MENU

PROCESS

14) Once saved, the **Project Report** will appear as a new record on the **Project Report Menu** and can be accessed at any time

IMPORTANT

- **Project Reports** should be completed weekly (by COB each Thursday)



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