Job Guide #4

Creating Project Reports
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)

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<tr>
<th>Version</th>
<th>Release Date</th>
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<tr>
<td>1.0</td>
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REVISION HISTORY

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)
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:
  - Have already been created in Facilities Connect
  - 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
**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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Welcome, NU Wildcat | Sign Out | About
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>>
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>>
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
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)
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).
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).
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)
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)
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 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)
14) Once saved, the Project Report will appear as a new record on the Project Report Menu and can be accessed at any time.

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