Job Guide #5

Managing Project Phase Checklists

VERSION 1.0
UPDATED 2/18/19

MANAGING PROJECT PHASE CHECKLISTS

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for locating, creating, and completing project phase checklists.

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

VERSION INFORMATION (THIS DOCUMENT)

Version **1.0** Release Date **2/18/2019**

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 (2/18/19)**

REVISION HISTORY

	Version	Release Date	Action	Owner
Most Recent →	1.0	2/18/2019	Created	NU Facilities
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NOW VIEWING HOME SCREEN (COMPANY FOCUS)

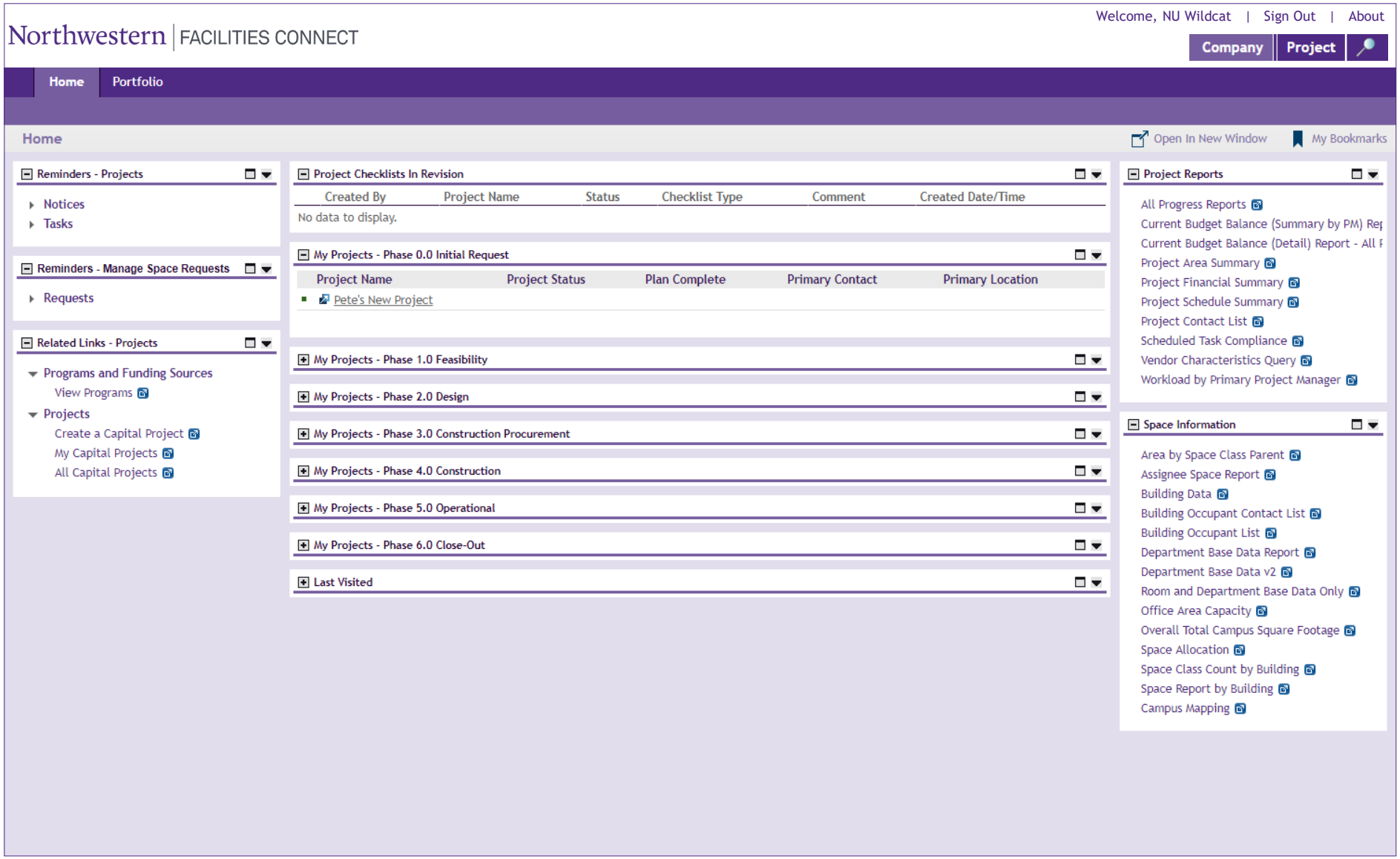
▼ GETTING STARTED

- To begin, access the **Facilities Connect Home Screen**
- In order to create a **Project Phase Checklist**, 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



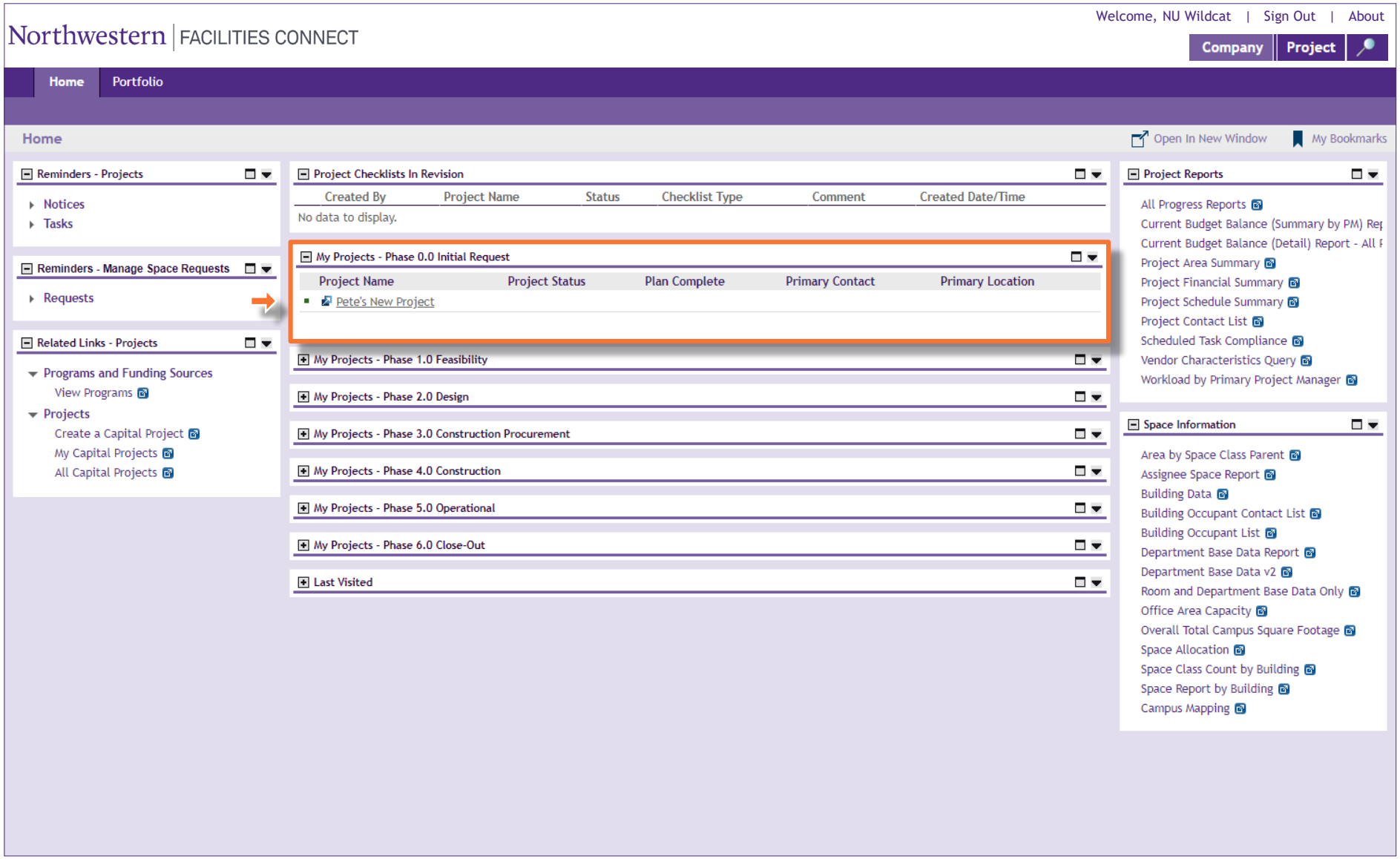
NOW VIEWING HOME SCREEN (COMPANY FOCUS)

▼ GETTING STARTED

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

▶ PROCESS

▶ IMPORTANT



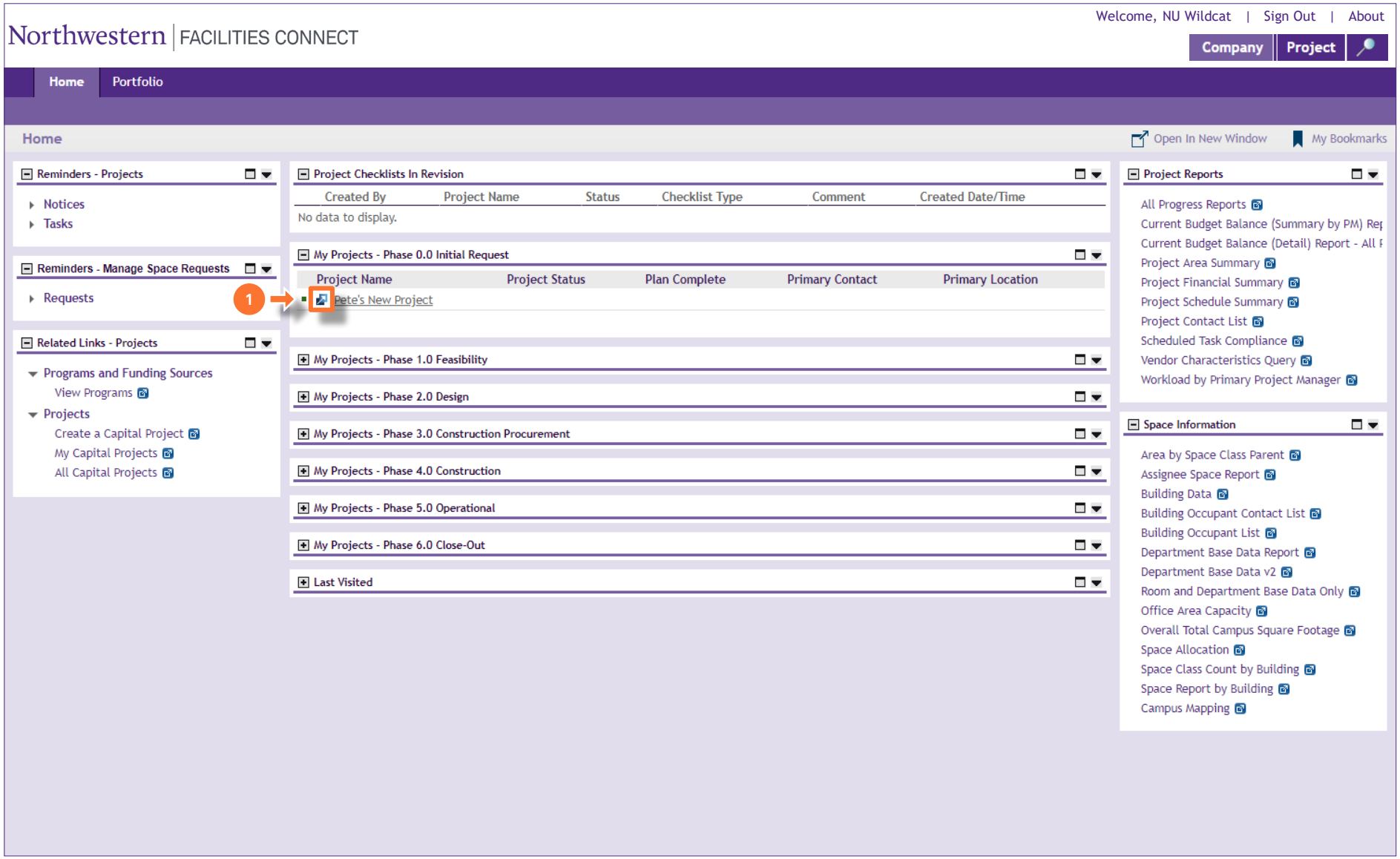
NOW VIEWING HOME SCREEN (COMPANY FOCUS)

▼ 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

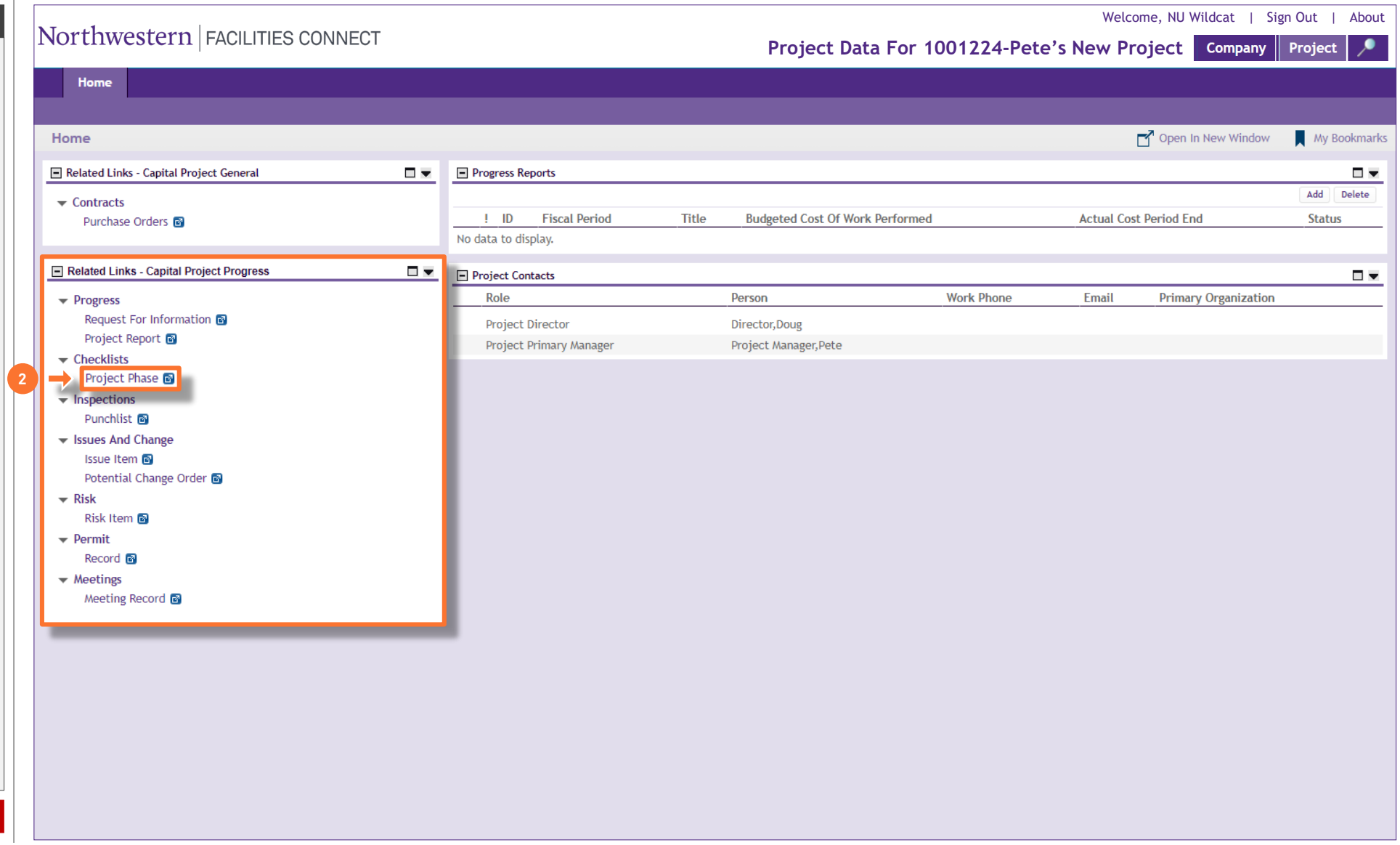


NOW VIEWING PROJECT INFORMATION (PROJECT FOCUS)

PROCESS

2) From the **Related Links – Capital Project Progress** portlet, under the **Checklists** group, click on the option for **Project Phase**

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



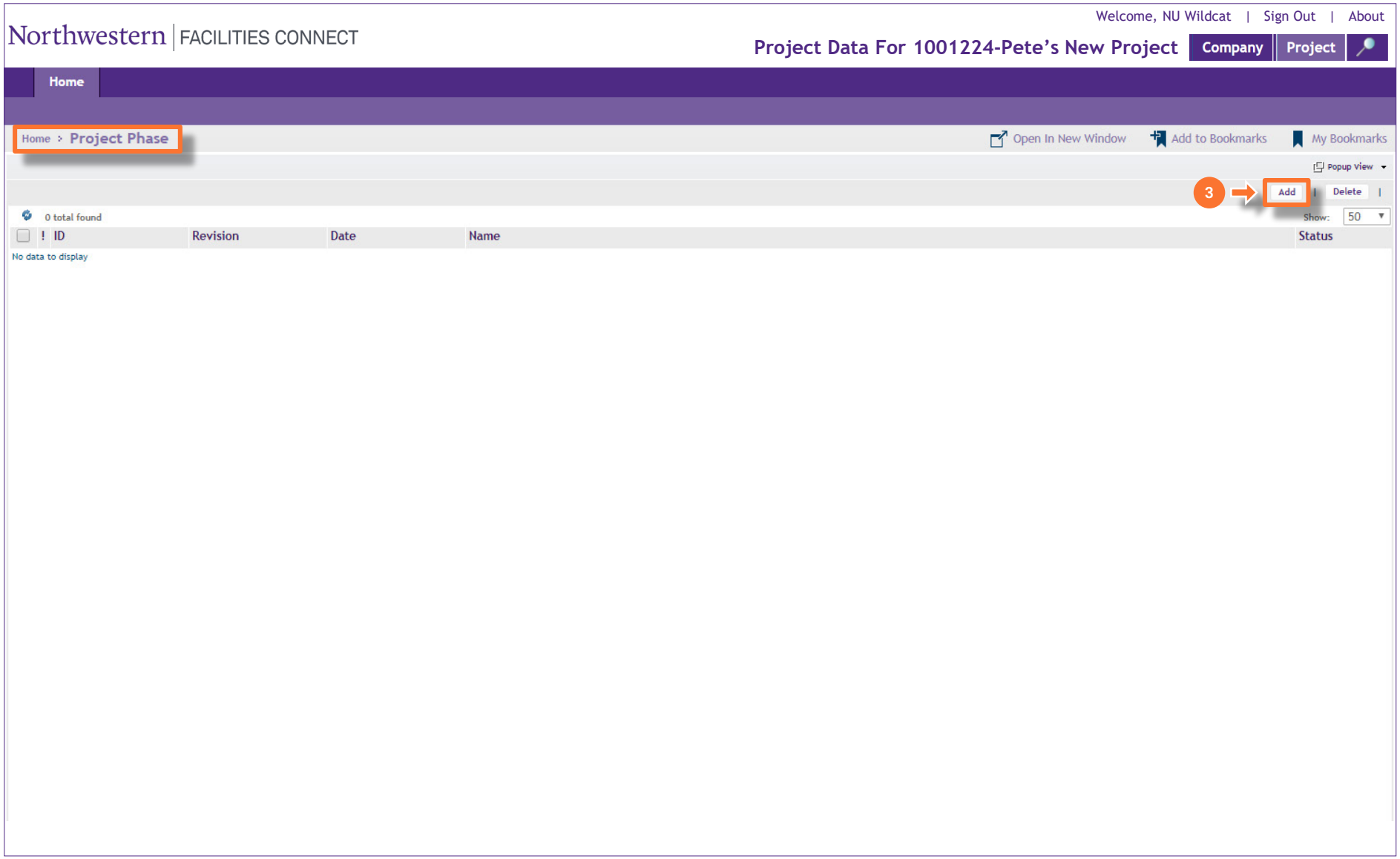
IMPORTANT

▼ PROCESS

3) From the **Project Phase Checklist Menu**, click on the **Add** button to create a new phase checklist

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

▶ IMPORTANT



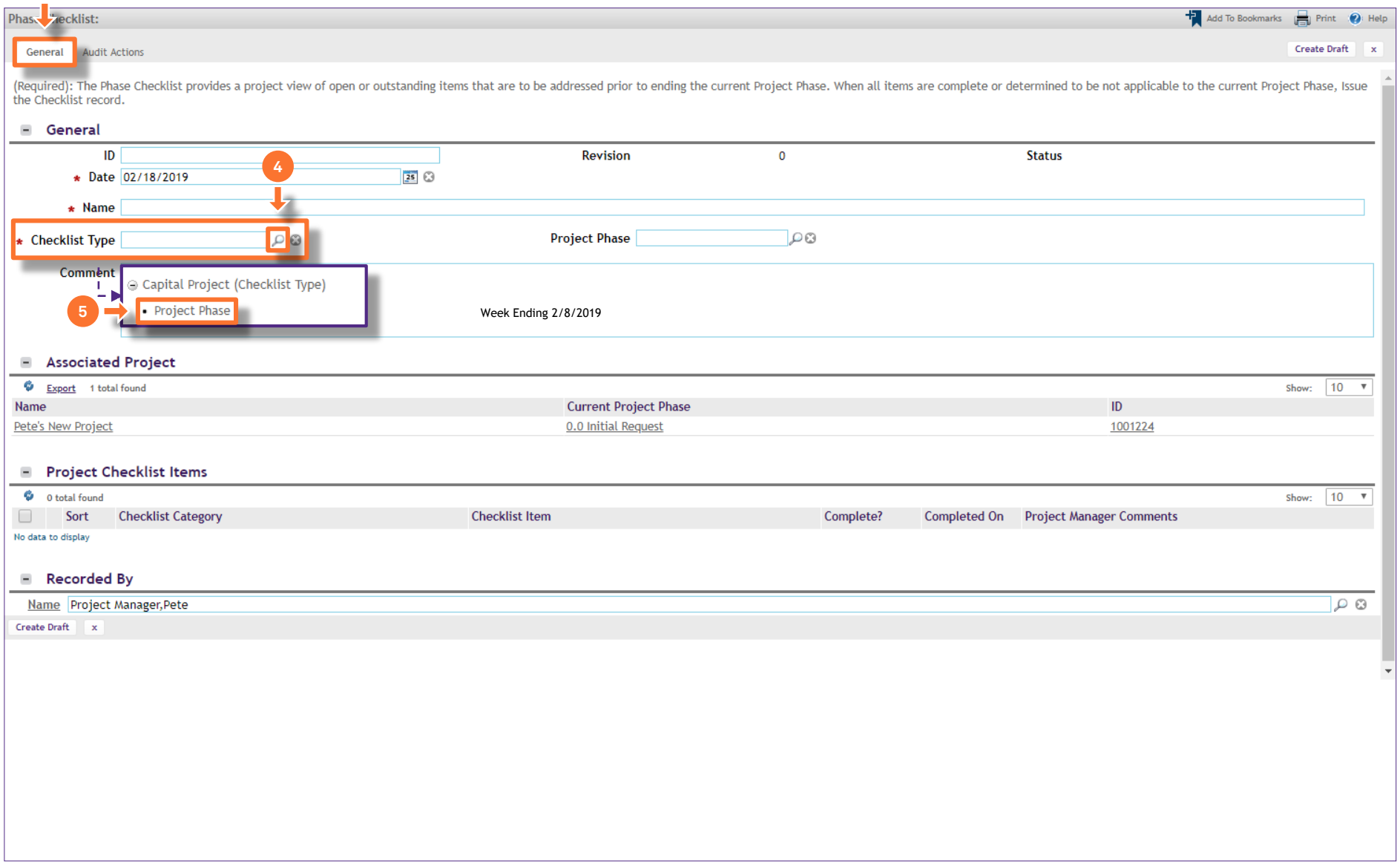
NOW VIEWING PROJECT PHASE CHECKLIST FORM

▼ PROCESS

On the **General** tab of the **Project Phase Checklist Form**:

4) Begin by adding the **Checklist Type**; click on the **Magnifying Glass** icon (right of the field)

5) The **Checklist Type** menu will now appear directly below; click the option labeled **Project Phase**



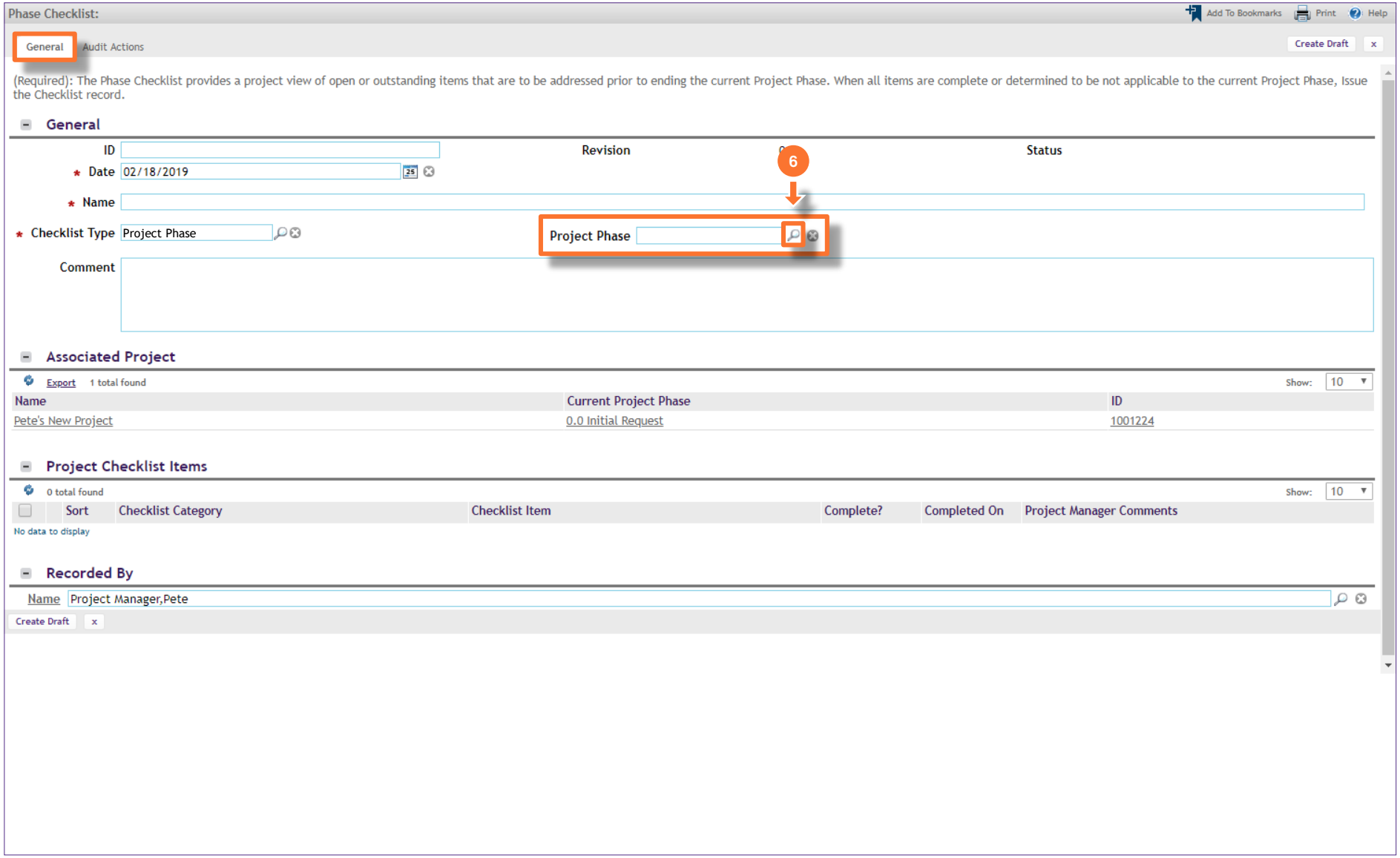
▶ IMPORTANT

NOW VIEWING PROJECT PHASE CHECKLIST FORM

▼ PROCESS

6) Next, select the **Project Phase**; click on the **Magnifying Glass** icon (right of the field)

▶ IMPORTANT



NOW VIEWING PROJECT PHASE CHECKLIST FORM

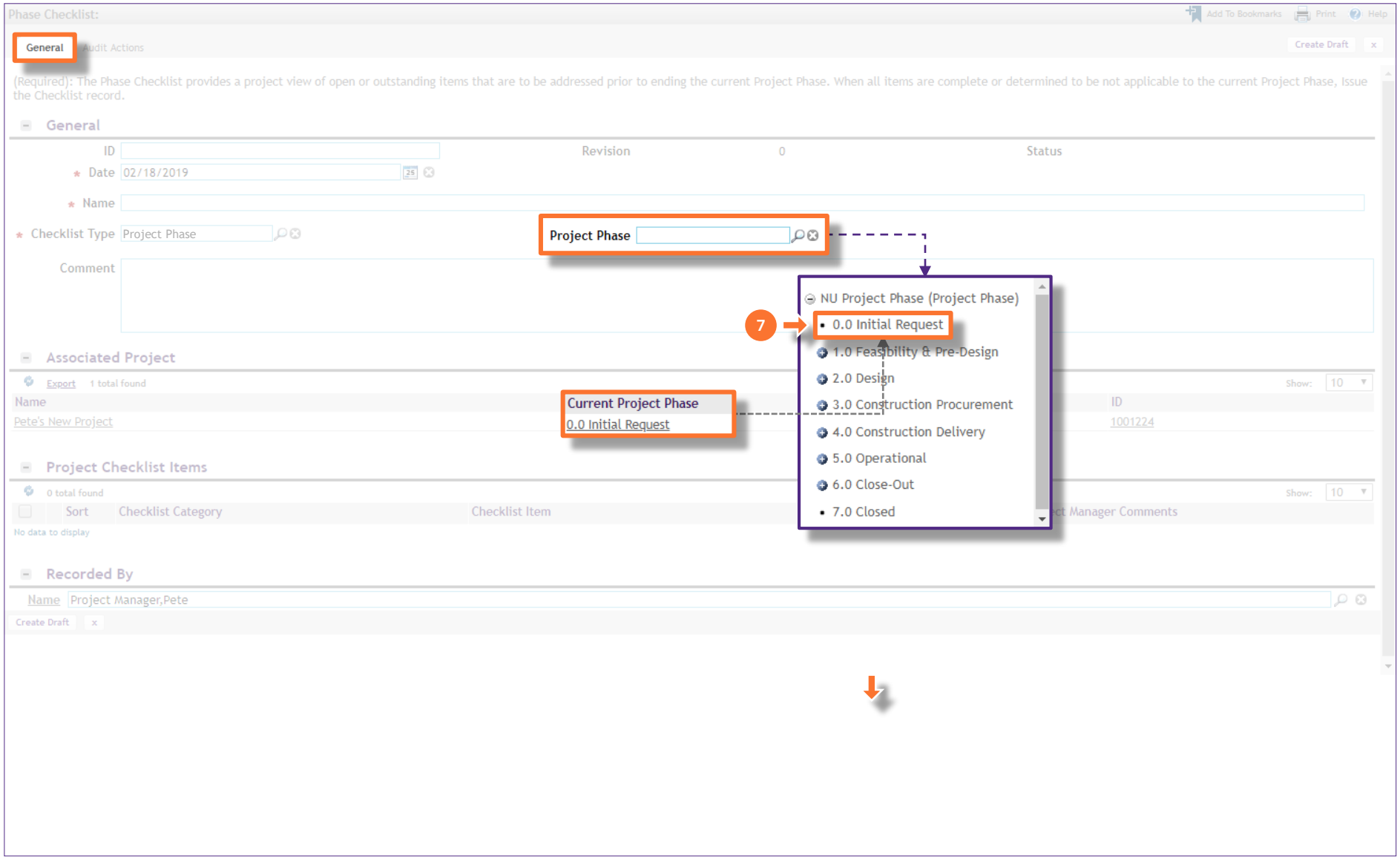
▼ PROCESS

7) The **Project Phase** menu will now appear directly below; select the appropriate **Project Phase** from the menu

Note: Select the **Project Phase** that matches the **Current Project Phase** shown on the form. As a Project Manager, you will mark completion status in the checklist for the project's current phase, not for the phase in which you are requesting advancement

Note: To access project subphases (i.e. large template phases) on the **Project Phase** menu, click on the expand icon (⊕) beside each major project phase

▶ IMPORTANT



NOW VIEWING PROJECT PHASE CHECKLIST FORM

▼ PROCESS

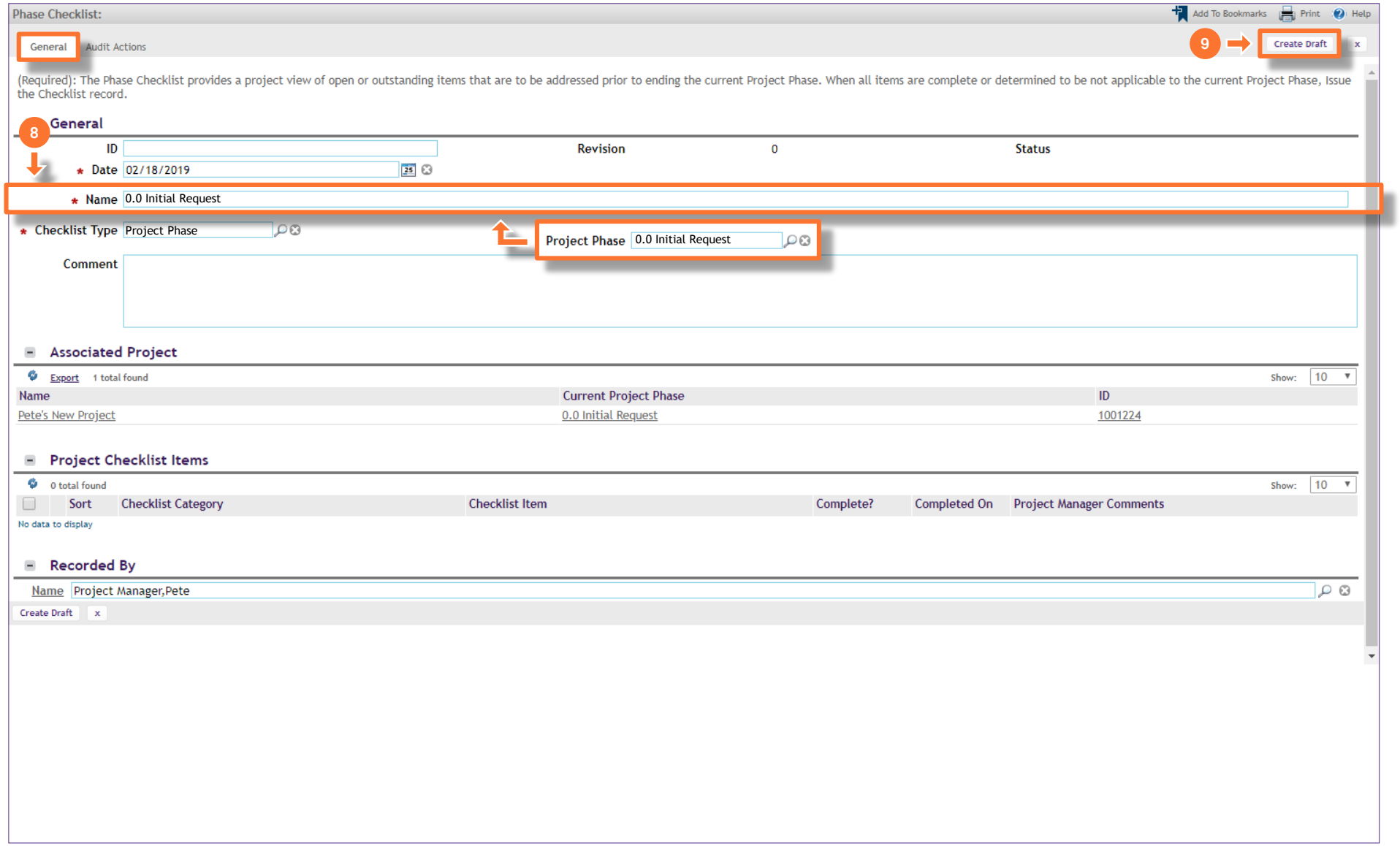
8) Next, update the checklist **Name** field; copy and paste the contents of the **Project Phase** field into the **Name** field

Note: These two (2) fields should match exactly before proceeding to the next step

9) Next, create a draft of your **Project Phase Checklist**; click on the **Create Draft** button (upper right of the form)

*<<Upon clicking, the **Project Phase Checklist** draft is saved, and new action buttons will appear at the upper right of the form>>*

▶ IMPORTANT



NOW VIEWING PROJECT PHASE CHECKLIST FORM

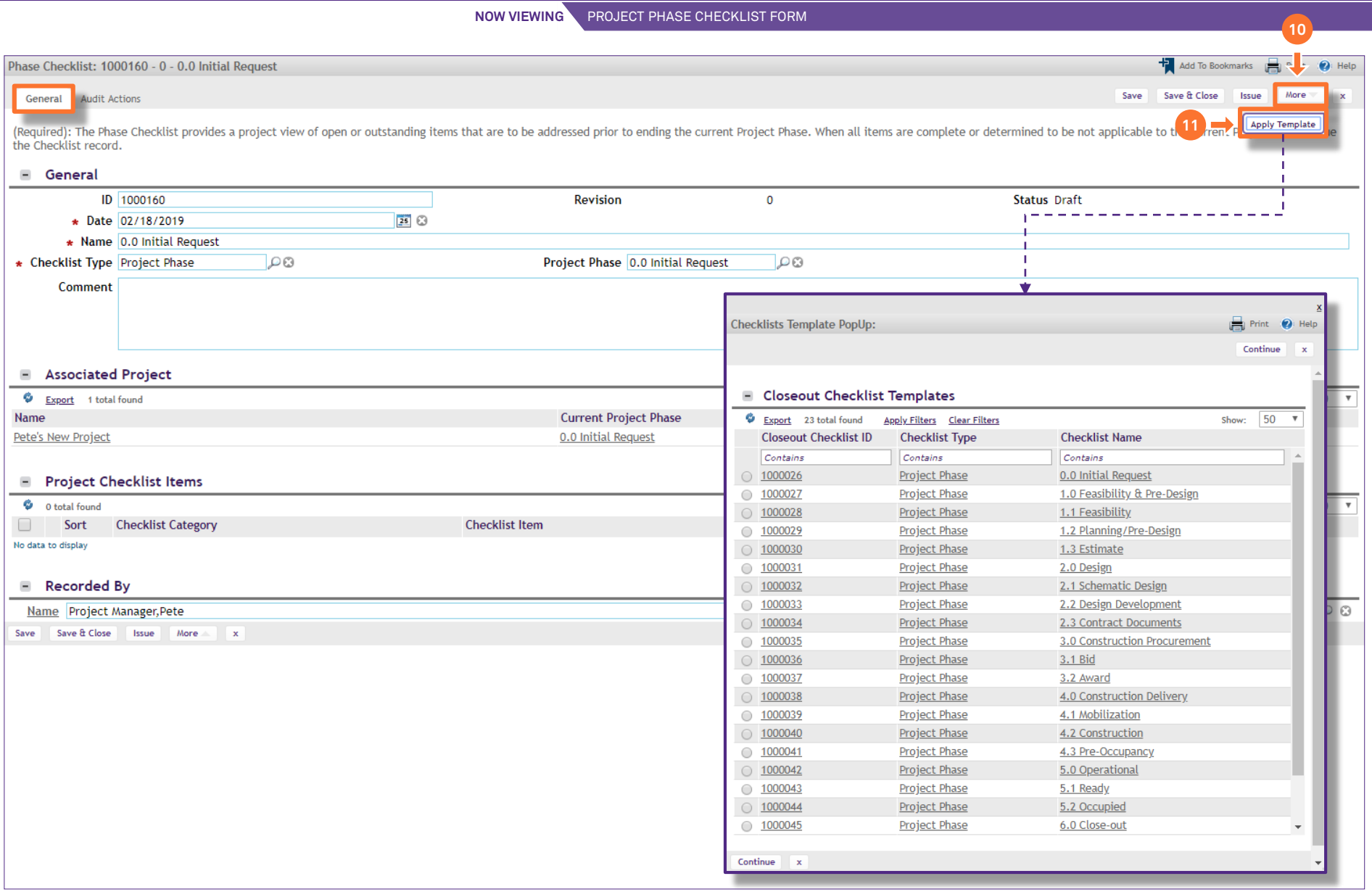
▼ PROCESS

10) Now that the checklist draft has been created, populate **Project Checklist Items** by clicking the **More** button (upper right of the form)

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

*<<Upon clicking, a new search window will open for selection of **Project Checklist Items**>>*

▶ IMPORTANT



NOW VIEWING PROJECT PHASE CHECKLIST FORM

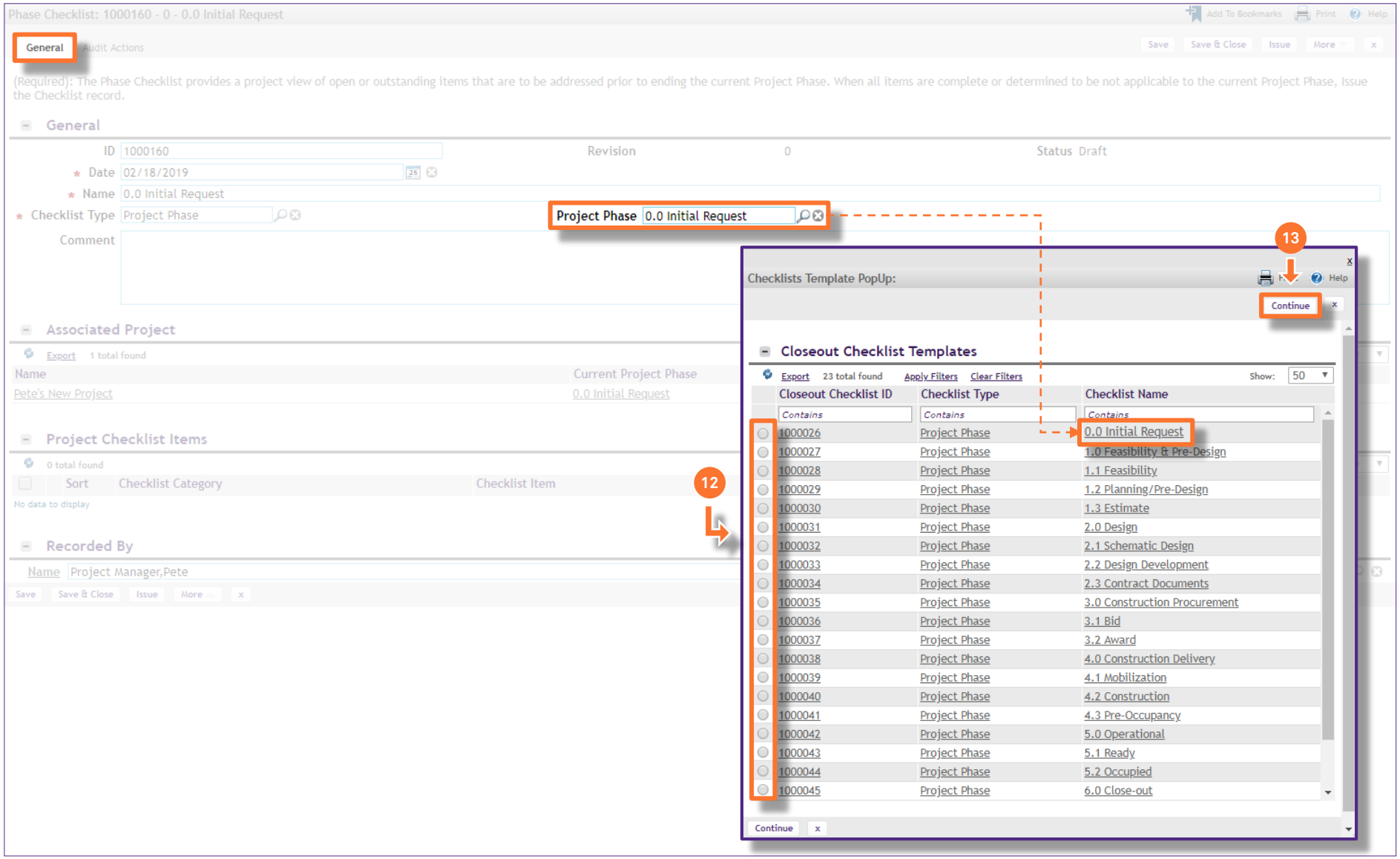
▼ PROCESS

12) Click the **Radio Button** for the current **Project Phase**; this will select the pre-defined list of **Project Checklist Items** aligned with that phase

13) Next, click the **Continue** button to confirm the selection

*<<Upon clicking, the search window will close, and the **Project Checklist Items** will be populated in the corresponding section of the form>>*

▶ IMPORTANT



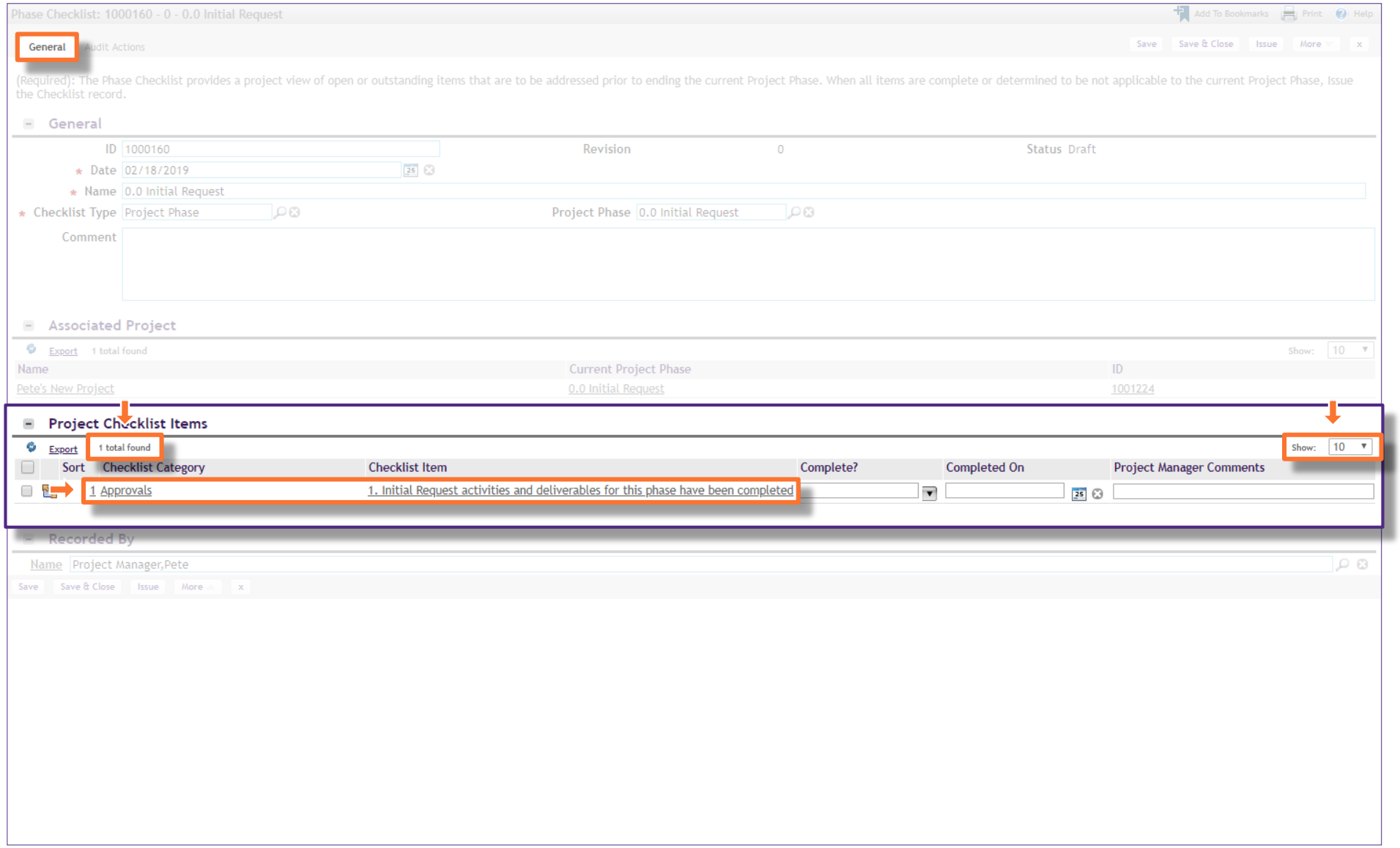
NOW VIEWING PROJECT PHASE CHECKLIST FORM

▼ PROCESS

The **Project Checklist Items** are now populated as a numbered list, representing the typical sequence of activities to occur in the given **Project Phase**

Note: Always be aware of the number of **Project Checklist Items** belonging to the given project phase. This is indicated by the **Number of Records Found** located immediately below the section header. In order to view the full list of **Project Checklist Items**, you may need to adjust the number of records (i.e. checklist items) displayed using the **Show** dropdown box on the right side of this section

▶ IMPORTANT



NOW VIEWING PROJECT PHASE CHECKLIST FORM

▼ PROCESS

To complete the **Project Phase Checklist**, perform the following steps for **each** of the **Project Checklist Items**:

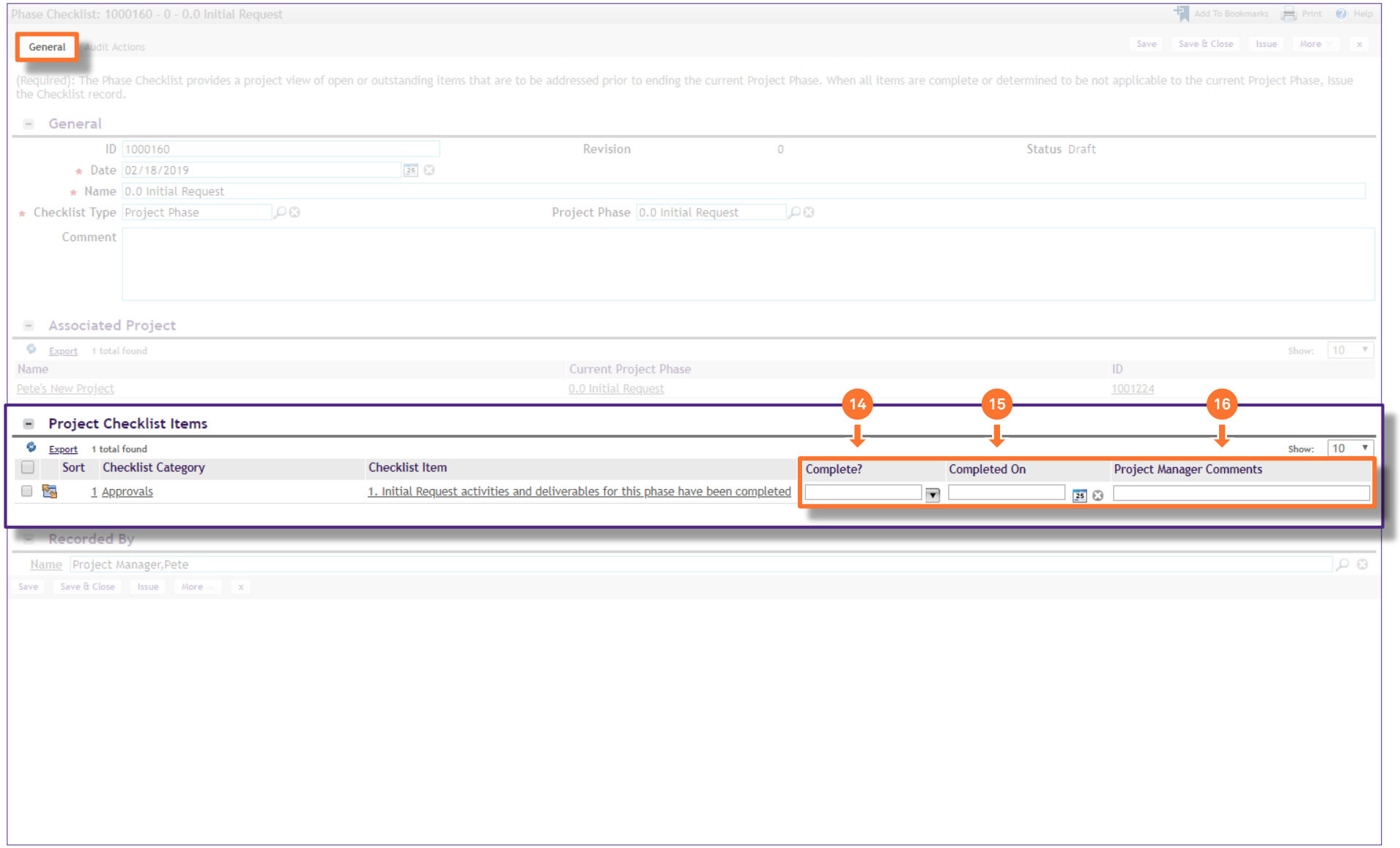
14) In the **Complete** column, use the dropdown box to select the **Completion Status** of the item. The available options are:
    - **Yes** – indicates the specific Project Checklist Item has been completed
    - **N/A** – indicates the specific Project Checklist Item is not applicable to the current project (PM Comment required)

15) In the **Completed On** column, enter the **Completion Date** of the item by using the calendar icon to select the date (or enter it directly into the content box in the date format **MM/DD/YYYY**)

16) In the **Project Manager Comments** column, enter any brief comments of notations pertaining to the **Project Checklist Item**.

Note: A comment is **required** for any items you indicated as **N/A** in the **Complete** column; any other comments for checklist items are optional and at the Project Manager's discretion

▶ IMPORTANT



NOW VIEWING PROJECT PHASE CHECKLIST FORM

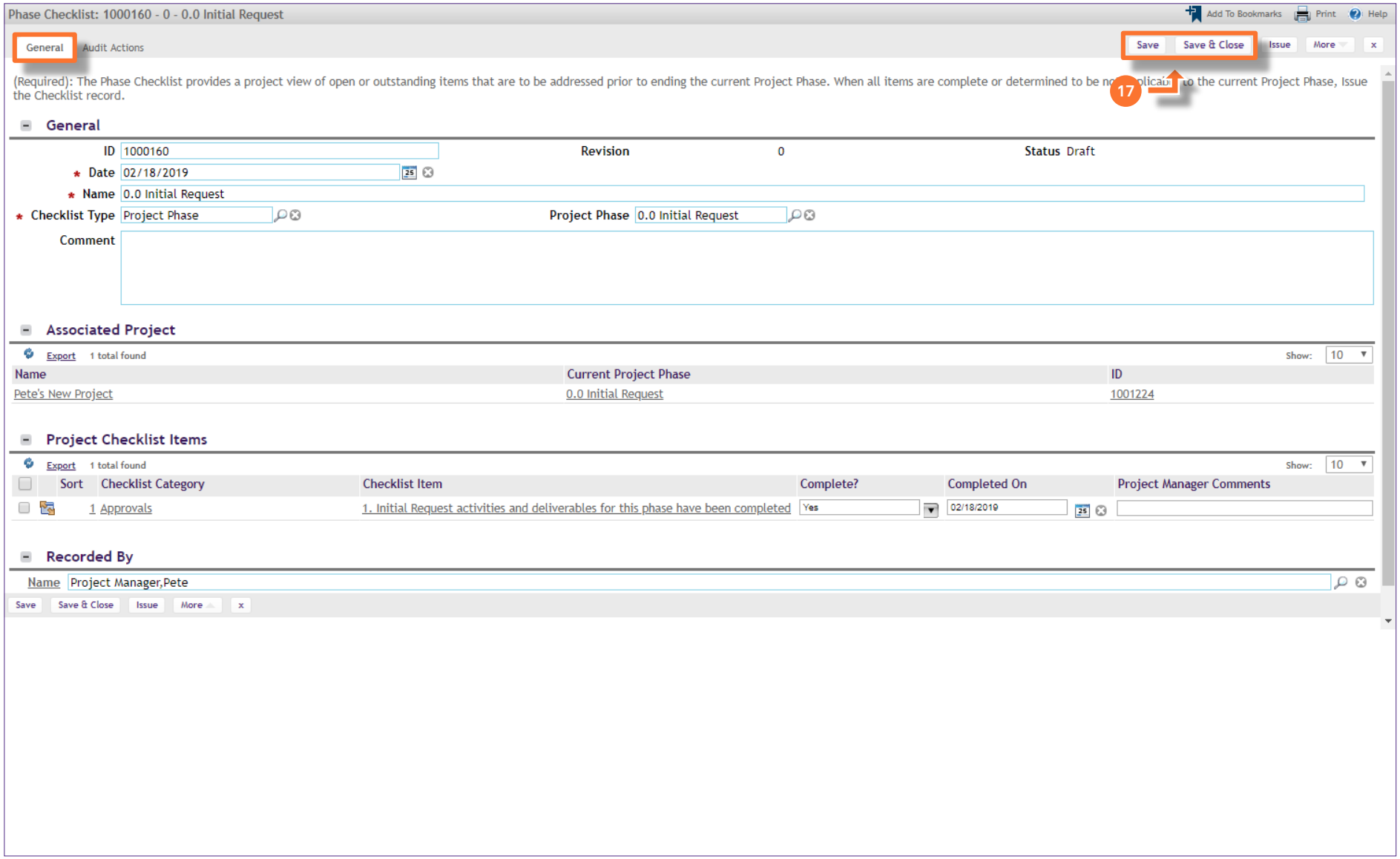
▼ PROCESS

17) As you complete a **Project Phase Checklist**, use the **Save** and **Save & Close** buttons to save your progress

Tip: Depending on individual phase length and project dynamics, you may need to update a **Project Phase Checklist** over multiple sessions. Use the **Save** and/or **Save & Close** buttons to save your progress until your are ready to submit the completed checklist to your **Project Director**

Please continue to steps #18-19 once you are ready to submit your completed Project Phase Checklist for Project Director review and approval

▶ IMPORTANT



NOW VIEWING PROJECT PHASE CHECKLIST FORM

▼ PROCESS

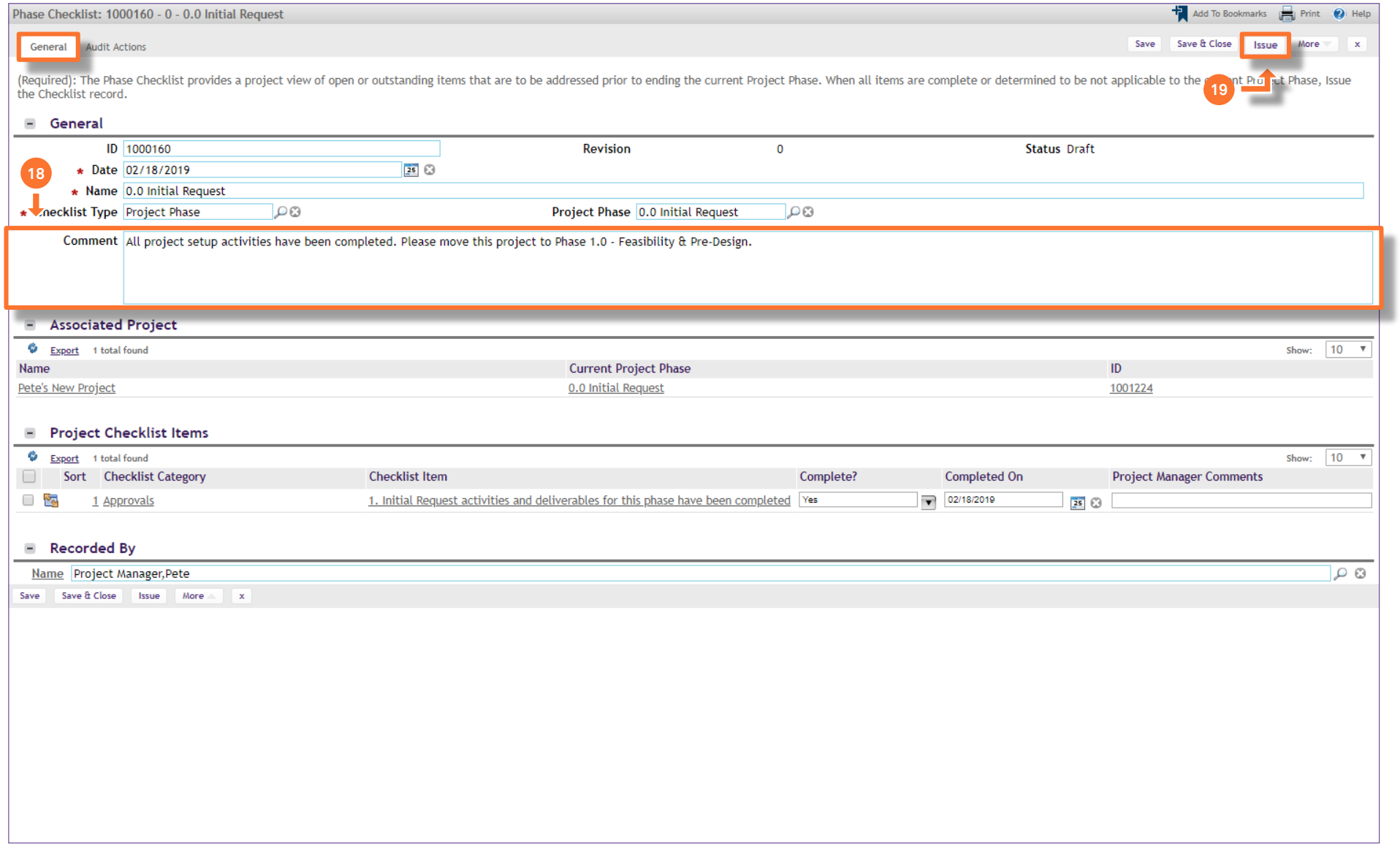
18) As you complete the **Project Phase Checklist** and prepare for submission, update the **Comment** field with a brief message to your **Project Director**. In this message, be sure to include the following:

- **Callouts** – indicate any key / pertinent information that the Project Director should know regarding this phase of the project; this **Comment Box** will be the first thing he/she reviews upon receipt of your checklist
- **Desired Next Project Phase** – indicate a requested next phase for the project. As not all projects are alike in scope and/or process, some phases may not be applicable. Be sure to clearly state the phase for which you believe the project should be assigned next

19) To submit your completed **Project Phase Checklist** to the **Project Director**, click on the **Issue** button.

The Project Phase Checklist has now been issued to the Project Director for his/her review and approval

▶ IMPORTANT



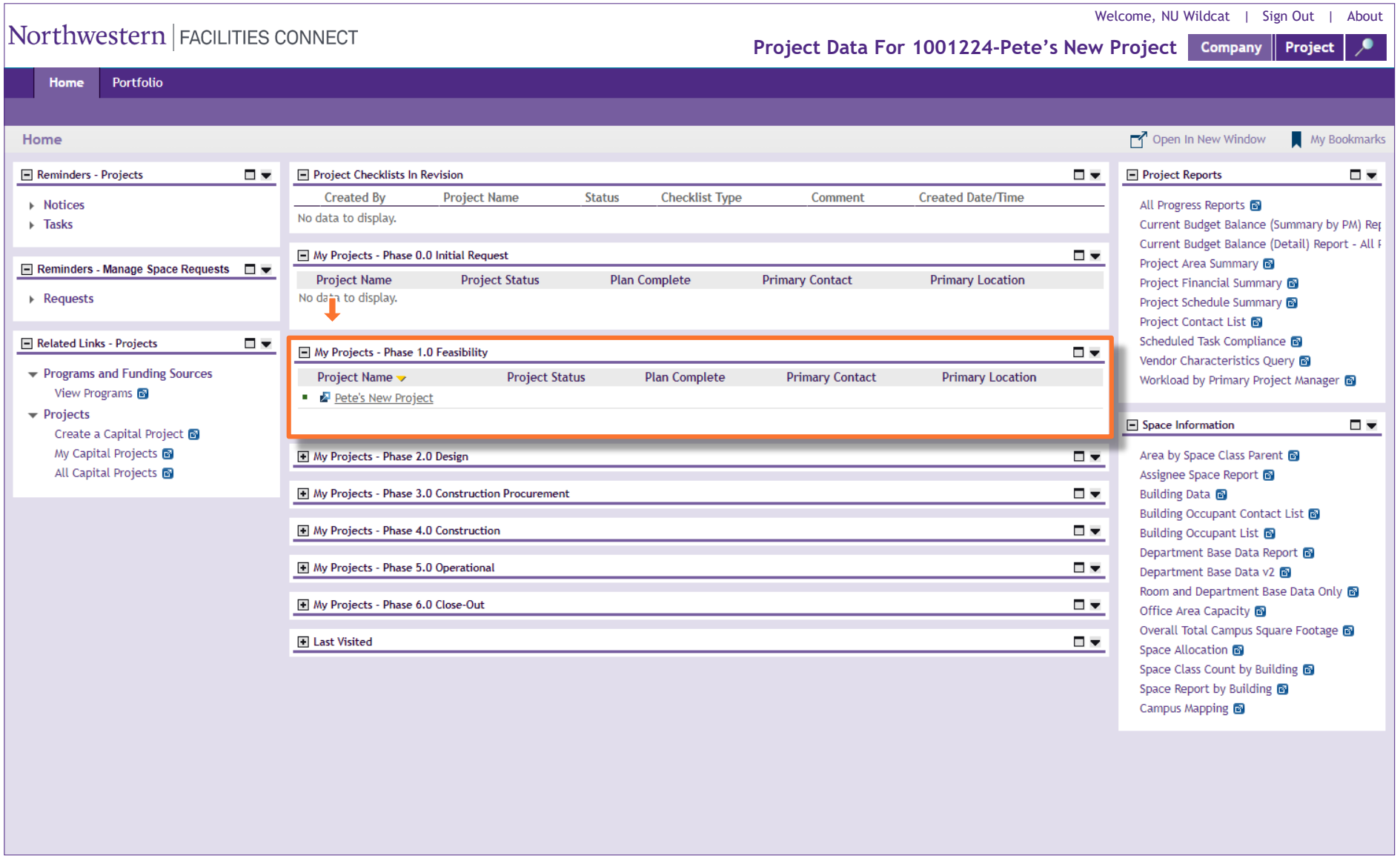
NOW VIEWING HOME SCREEN (COMPANY FOCUS)

▼ PROCESS

Once the **Project Director** has reviewed your **Project Phase Checklist**, he/she will take one of two (2) available actions:

1. **Approval** - the checklist is advanced to the requested project phase, and will move between your **'My Projects' Phase** portlets, indicating the change in status and advancement of project phase

▶ IMPORTANT



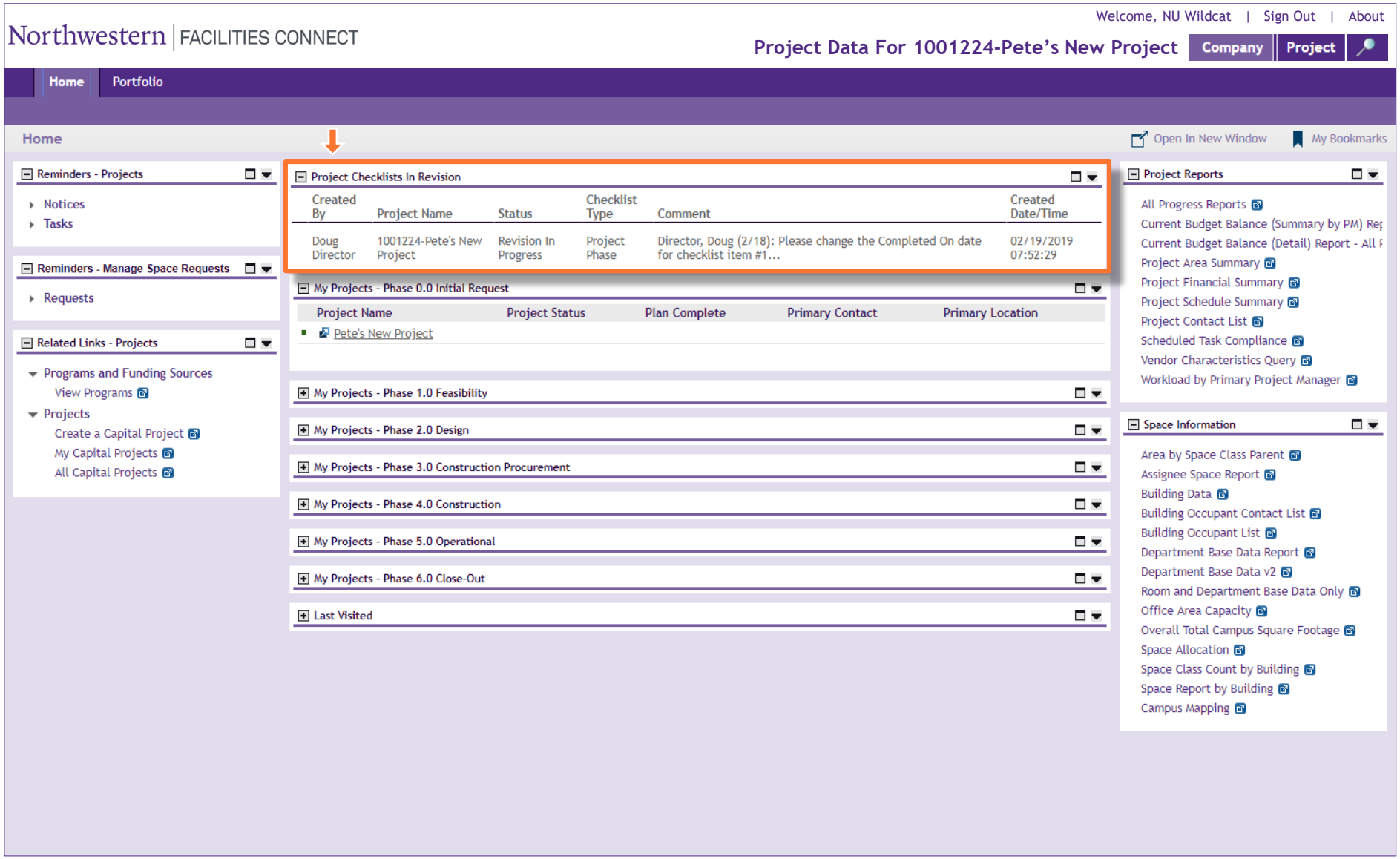
NOW VIEWING HOME SCREEN (COMPANY FOCUS)

▼ PROCESS

Once the **Project Director** has reviewed your **Project Phase Checklist**, he/she will take one of two (2) available actions:

2. **Return for Revision** - the checklist appears in your **Project Checklists In Revision** portlet, indicating that the **Project Director** has a follow-up question and/or revision request for your checklist

▶ IMPORTANT



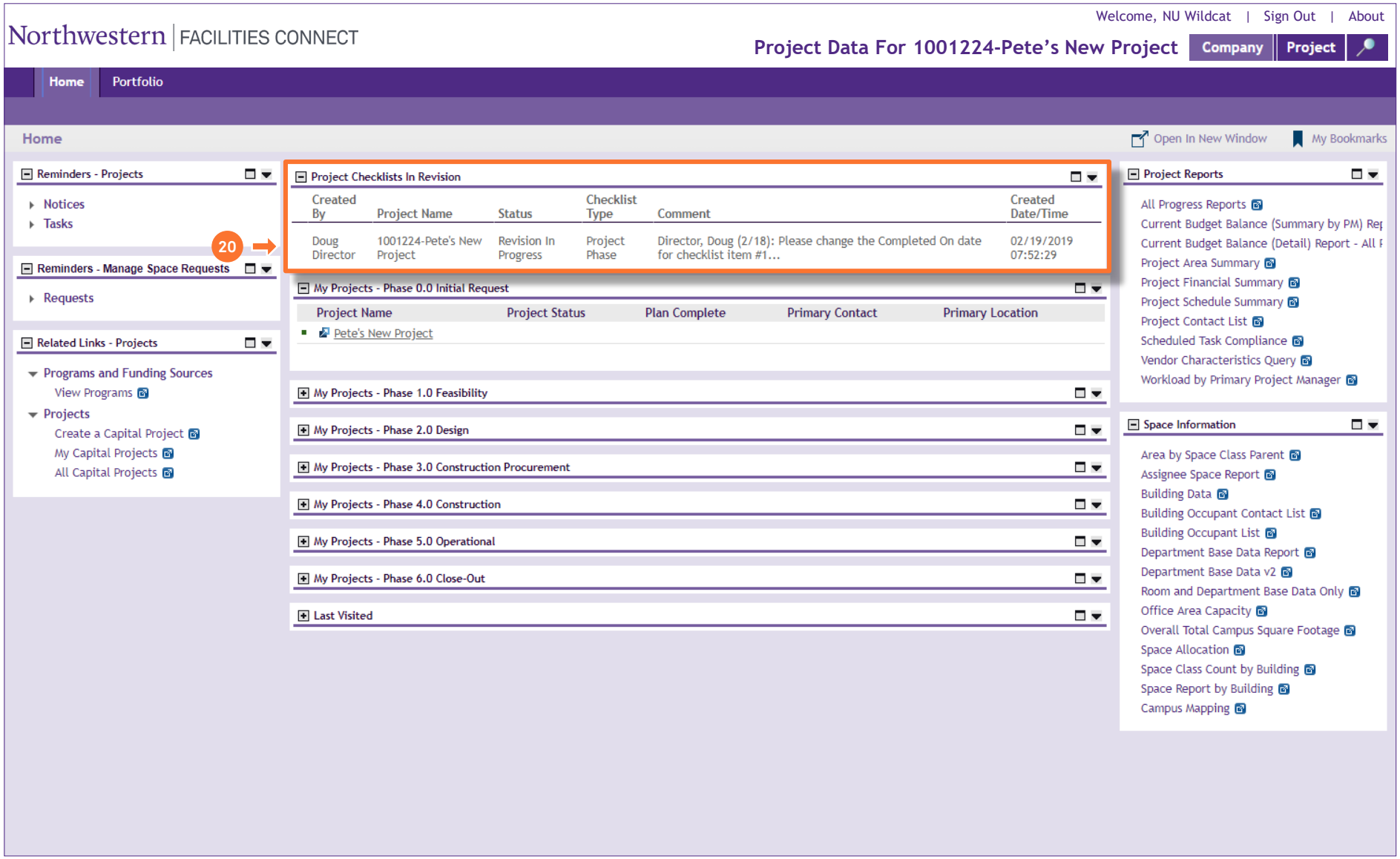
NOW VIEWING HOME SCREEN (COMPANY FOCUS)

▼ PROCESS

To revise the **Project Phase Checklist**,

20) Click on the revision item in the **Project Checklists In Revision** portlet

*<<Upon clicking, the **Project Phase Checklist** will in a new window>>*



▶ IMPORTANT

NOW VIEWING PROJECT PHASE CHECKLIST FORM

▼ PROCESS

21) Review the comments and/or revision request(s) from the **Project Director** that he/she has added in the **Comment** field

22) Based on the feedback, make any necessary modifications to the **Project Checklist / Checklist Items**

    Tip: Use the **Save** and/or **Save & Close** buttons to save your progress until your are ready to re-submit the checklist to your **Project Director**

23) When you are ready submit the revised checklist to the **Project Director**, click on the **Issue** button

▶ IMPORTANT