Job Guide #5

Managing Project Phase Checklists
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)

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<th>Version</th>
<th>Release Date</th>
<th>Action</th>
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<td>1.0</td>
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Version Release Date Action Owner

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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 (2/18/19)
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:

- 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.
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**

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**Important**

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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, under the Checklists group, click on the option for Project Phase. (Upon clicking, the Project Phase Checklist Menu for the selected project will appear.)
3) From the Project Phase Checklist Menu, click on the Add button to create a new phase checklist.

<i>Upon clicking, the Project Phase Checklist Form will open as a new window.</i>
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
6) Next, select the Project Phase; click on the Magnifying Glass icon (right of the field)

**IMPORTANT**
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 (expand icon) beside each major project phase.
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>>
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>>
12) Click the Radio Button for the current Project Phase; this will select the predefined 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>>
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.
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 or 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.
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 you 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.
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.
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.
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.
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 open in a new window>>
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 you 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.