



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 Financial administrator will create the new project record, then send it to the Project Manger to complete the details.

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)

Version	1.4	Release Date	12/03/2024
Owner	NU Facilities		
Version Notes	The updated version of the document reflects the changes made to the Project Creation process in conjunction with Capital Projects and Finance departments.		

REVISION HISTORY

Most Recent →	Version	Release Date	Action	Owner
	1.4	12/03/2024	Updated	NU Facilities
	1.3	09/18/2024	Updated	NU Facilities
	1.2	07/15/2022	Updated	NU Facilities
	1.1	03/04/2022	Updated	NU Facilities
	1.0	02/13/2019	Created	NU Facilities



▼ GETTING STARTED

❖ To begin, access the Facilities Connect Home Screen

▶ PROCESS

▶ IMPORTANT

Northwestern | FACILITIES CONNECT

Home

Requests

Projects

Tasks

Maintenance

Inventory

Portfolio

Home

Reminders - Projects

Notices

Tasks

Reminders - Manage Space Requ...

Requests

Related Links - Projects

Programs and Funding Sources

Projects

Project Checklists In Revision

Created By	Project Name	Status	Checklist Type	Comment	Created Date/Time
No data to display.					
My Projects - Phase 0.0 Initial Request					
My Projects - Phase 1.0 Feasibility					
My Projects - Phase 2.0 Design					
My Projects - Phase 3.0 Construction Procurement					
My Projects - Phase 4.0 Construction					
My Projects - Phase 5.0 Operational					
My Projects - Phase 6.0 Close-Out					
My Projects - Phase 7.0 Closed					
Last Visited					

Project Reports

All Progress Reports

Current Budget Balance (Summary by PM)

Current Budget Balance (Detail) Report - /

Project Area Summary

Project Financial Summary

Project Schedule Summary

Project Contact List

Scheduled Task Compliance

Vendor Characteristics Query

Workload by Primary Project Manager

Space Information

My Responsible Spaces

Northwestern Spaces

Area by Space Class Parent

Assignee Space Report

Building Data

Building Occupant Contact List

Building Occupant Location Contact Li

Building Occupant List

Department Base Data Report

Department Base Data v2

Office Area Capacity

Overall Total Campus Square Footage

Room and Department Base Data Only



▼ PROCESS

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>>

► IMPORTANT

Northwestern | FACILITIES CONNECT

Home

Requests

Projects

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Home

Reminders - Projects

Project Checklists In Revision

Project Reports

Space Information

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▼ Tasks

▼ Reminders - Manage Space Requ...

▼ Requests

▼ Related Links - Projects

▼ Programs and Funding Sources

▼ Projects

0 - Action Items

45 - Notifications

411 - Overdue Tasks

2 - Tasks Due This Week

1 - Tasks Over Budget

6 - My Active Requests

View Programs

Create a Capital Project

All Capital Projects

My Projects - Phase 0.0 Initial Request

My Projects - Phase 1.0 Feasibility

My Projects - Phase 2.0 Design

My Projects - Phase 3.0 Construction Procurement

My Projects - Phase 4.0 Construction

My Projects - Phase 5.0 Operational

My Projects - Phase 6.0 Close-Out

My Projects - Phase 7.0 Closed

ast Visited

All Progress Reports

Current Budget Balance (Summary by PM)

Current Budget Balance (Detail) Report - /

Project Area Summary

Project Financial Summary

Project Schedule Summary

Project Contact List

Scheduled Task Compliance

Vendor Characteristics Query

Workload by Primary Project Manager

Area by Space Class Parent

Assignee Space Report

Building Data

Building Occupant Contact List

Building Occupant Location Contact Li

Building Occupant List

Department Base Data Report

Department Base Data v2

Office Area Capacity

Overall Total Campus Square Footage

Room and Department Base Data Only



PROCESS

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.

3) Select the appropriate **Project Status**; use the magnifying glass to select **Active**.

TIPS + TRICKS

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).

IMPORTANT

The **Project Reporting Name** must match the name in the **Chartstring confirmation email** from the Budget office. If these names do not match, the financials will not match.

Northwestern | FACILITIES CONNECT

Create a Capital Project

General Scope Schedule Budget Procurement Contacts Notes & Documents

(Required): Create a Project by entering general information about the project.

General

ID: [] Status: []

* Date: 04/01/2022 [25] [X]

2 * Name: []

* Project Reporting Name: []

Project Type: [] Project Classification: New Construction []

3 * Project Status: Active [] Project Phase: 0.0 Initial Request []

* Project Category: []

Accounting Cost Center: []

Project Status (Project Status)

- Active
- Cancelled
- Complete
- Future
- On Hold

Units

Environmental

City: [] State/Province: [] Country: []

t/SqFt (Budget Current / Project Gross Construction Area) \$.00 US Dollars



PROCESS

- 4) Select the appropriate **Project Category**; use the dropdown arrow to select either **Capitalized** or **Non-Capitalized**.
- 5) 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

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Create a Capital Project

General Scope Schedule Budget Procurement Contacts Notes & Documents

(Required): Create a Project by entering general information about the project.

General

ID Status

* Date 04/01/2022

* Name Abbott Hall Second Floor MFA Teaching Studio Buildout 2022

* Project Reporting Name Abbott Hall Second Floor MFA Teaching Studio Buildout 2022

Details

Project Type Project Classification New Construction

Project Status Project Phase 0.0 Initial Request

Project Website about:blank

* Project Category Capitalized

* Chartstring

Accounting Cost Center Project Cost/SqFt (Budget Current / Project Gross Construction Area) 5.00 US Dollars

Units

Environmental

City

State/Province Country



PROCESS

6) Use the **Magnifying Glass** to search and select your project's Chartstring.

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

IMPORTANT

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Create a Capital Project

PrintAdd to BookmarksMy Bookmarks

Create Draft x

GeneralScopeScheduleBudgetProcurementContactsNotes & Documents

(Required): Create a Project by entering general information about the project.

General

IDStatus

Date04/01/2022

NameAbbott Hall Second Floor MFA Teaching Studio Buildout 2022

Project Reporting NameAbbott Hall Second Floor MFA Teaching Studio Buildout 2022

Abbott Hall Second Floor MFA Teaching Studio Buildout 2018

Details

Project TypeProject ClassificationNew Construction

Project StatusProject Phase0.0 Initial Request

Project Websiteabout:blank

Project CategoryCapitalized

Accounting Cost Center

Project Cost/SqFt (Budget Current / Project Gross Construction Area)\$0.00 US Dollars

Chartstring

Units

Environmental

City

State/Province

All Capital Chartstring

Apply FiltersClear Filters

	Chartstring	Fund Code	Department ID	Project ID	Activity ID	Activity Start Date
	Contains	Contains	Contains	Contains	Contains	After
<input type="radio"/>	812-1371100-80029253-01	812	1371100	80029253	01	07/01/2011
<input type="radio"/>	812-1371100-80029253-02	812	1371100	80029253	02	07/01/2011
<input type="radio"/>	812-1371101-80039833-01	812	1371101	80039833	01	09/01/2014
<input type="radio"/>	812-1371101-80039833-02	812	1371101	80039833	02	09/01/2014
<input type="radio"/>	812-1371106-80018264-01	812	1371106	80018264	01	01/01/1901
<input type="radio"/>	812-1371110-80036493-01	812	1371110	80036493	01	03/05/2014

Items per page: 501 - 50 of 796 items1 of 16 pages



▼ PROCESS

7) Use the available **Column Headers / Search Fields** to sort and filter the list of available Chartstrings.

▼ IMPORTANT

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Create a Capital Project

PrintAdd to BookmarksMy Bookmarks

GeneralScopeScheduleBudgetProcurementContactsNotes & Documents

Create Draft x

(Required): Create a Project by entering general information about the project.

General

IDStatus

Date04/01/2022

NameAbbott Hall Second Floor MFA Teaching Studio Buildout 2022

Project Reporting NameAbbott Hall Second Floor MFA Teaching Studio Buildout 2022

Abbott Hall Second Floor MFA Teaching Studio Buildout 2018

Details

Project TypeProject ClassificationNew Construction

Project StatusProject Phase0.0 Initial Request

Project Websiteabout:blank

Project CategoryCapitalizedChartstring

Accounting Cost Center

Units

Environmental

City

State/Province

All Capital Chartstring

Apply FiltersClear Filters

Chartstring	Fund Code	Department ID	Project ID	Activity ID	Activity Start Date	
Contains	Contains	Contains	Contains	Contains	After	
<input type="radio"/>	812-1371100-80029253-02	812	1371100	80029253	02	07/01/2011
<input type="radio"/>	812-1371101-80039833-01	812	1371101	80039833	01	09/01/2014
<input type="radio"/>	812-1371101-80039833-02	812	1371101	80039833	02	09/01/2014
<input type="radio"/>	812-1371106-80018264-01	812	1371106	80018264	01	01/01/1901
<input type="radio"/>	812-1371110-80036493-01	812	1371110	80036493	01	03/05/2014

Items per page: 501 - 50 of 796 items1 of 16 pages



▼ PROCESS

8) 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>>

▼ IMPORTANT

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Create a Capital Project

PrintAdd to BookmarksMy Bookmarks

Create Draft x

GeneralScopeScheduleBudgetProcurementContactsNotes & Documents

(Required): Create a Project by entering general information about the project.

General

IDStatus

Date04/01/2022

NameAbbott Hall Second Floor MFA Teaching Studio Buildout 2022

Project Reporting NameAbbott Hall Second Floor MFA Teaching Studio Buildout 2022

Abbott Hall Second Floor MFA Teaching Studio Buildout 2018

Details

Project TypeProject ClassificationNew Construction

Project StatusProject Phase0.0 Initial Request

Project Websiteabout:blank

Project CategoryCapitalizedChartstring

Accounting Cost Center

Units

Environmental

City

State/Province

All Capital Chartstring

Apply FiltersClear Filters

Chartstring	Fund Code	Department ID	Project ID	Activity ID	Activity Start Date
Contains	Contains	Contains	Contains	Contains	After
<input type="radio"/> 812-1371100-80029253-01	812	1371100	80029253	01	07/01/2011
<input type="radio"/> 812-1371100-80029253-02	812	1371100	80029253	02	07/01/2011
<input type="radio"/> 812-1371101-80039833-01	812	1371101	80039833	01	09/01/2014
<input type="radio"/> 812-1371101-80039833-02	812	1371101	80039833	02	09/01/2014
<input type="radio"/> 812-1371106-80018264-01	812	1371106	80018264	01	01/01/1901
<input type="radio"/> 812-1371110-80036493-01	812	1371110	80036493	01	03/05/2014

Items per page: 501 - 50 of 796 items1 of 16 pages



▼ PROCESS

<<Scroll down to the **Primary Location** section>>

9) Next, add the project’s **Primary Location**.

• From the **Primary Location** section, click the **Find** button.

10) 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.

▼ IMPORTANT

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Primary Location

★ Location Path

Campus

Floor

Building

Primary Location Graphic

No Graphic Available

Site Address

Address

No data to display

Find

Clear

All Locations

Apply Filters

Clear Filters

10

Please type in the appropriate filter values and press the "Enter" key or click on "Apply Filters" to perform a query.

Campus

Building

Floor

Wing

Name

Contains

Contains

Contains

Contains

Contains

Items per page: 50

0 of 0 items

0 of 0 pages

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▼ PROCESS

11) 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.

▼ IMPORTANT

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Primary Location

Find Clear

★ Location Path

Campus

Floor

Building

Primary Location Graphic

OK ✓ Cancel ×

All Locations

Apply Filters Clear Filters

Campus	Building	Floor	Wing	Name	Type
<div>11</div> <div><div><div></div><div>Evanston</div></div><div><div></div><div>Evanston Campus</div></div><div><div></div><div>Evanston Campus</div></div><div><div></div><div>Evanston Campus</div></div><div><div></div><div>Evanston Campus</div></div><div><div></div><div>Evanston Campus</div></div><div><div></div><div>Evanston Campus</div></div><div><div></div><div>Evanston Campus</div></div><div><div></div><div>Evanston Campus</div></div><div><div></div><div>Evanston Campus</div></div></div>	Contains	Contains	Contains	Contains	Contains
	Evanston Campus	1007 Church	02	00203D	Space
	Evanston Campus	1007 Church	02	00203E	Space
	Evanston Campus	1007 Church	02	00203F	Space
	Evanston Campus	1007 Church	02	00203G	Space
	Evanston Campus	1007 Church	02	00203H	Space
	Evanston Campus	1007 Church	02	00203J	Space
	Evanston Campus	1007 Church	02	00203K	Space
	Evanston Campus	1007 Church	02	00204	Space

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▼ PROCESS

From the **Schedule** tab, use the calendar icon to enter the following dates,

12) Edit the **Plan Start** date, which represents the initiation of the project.

13) Edit the **Substantial Completion** date, which represents the date construction is to be completed.

14) Edit the **Anticipated Financial End** date, which represents the when all financial transactions should be completed and processed for the project.

▼ IMPORTANT

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General

Schedule

Budget

Procurement

Contacts

Notes & Documents

Activate Save Save & Close More x

(Optional): Provide general information concerning the project schedule, project tasks and assumptions.

12

Summary

Import From MS Project Export To MS Project

★ Plan Start

09/21/2023

25

×

★ Substantial Completion

05/31/2024

25

×

★ Anticipated Financial End

05/31/2024

25

×

Actual Start

09/21/2023

25

×

Calculated Start

09/21/2023

★ Time Zone

(GMT -6) Central Time (US, Canada) [US/Central]

×

14

Calculated End

05/29/2024

★ Calculate Project From

Start

▼

Project Tasks Gantt

Project Tasks Critical Path Tasks Task Hierarchy Dependencies

Project Tasks

Refresh Add Find Remove Baseline

Apply Filters Clear Filters ↺ ⚙️ ⚙️ ⚙️ ⚙️ ⚙️

<input type="checkbox"/>	#	Type	ID	Task Name	Planned Start	Planned End	Percent Complete	Actual Cost	\$
		Contains	Contains	Contains	Equals	Equals	More Than or Equa		
<input type="checkbox"/>	0	Schedule Task	118057593	Phase 0.0 Initial Request	09/21/2023 11:42:18	10/09/2023 11:42:18	0 percent	\$.00	
<input type="checkbox"/>	0	Schedule Task	118057594	Phase 1.0 Feasibility & Pre-D...	10/09/2023 11:42:18	11/27/2023 11:42:17	0 percent	\$.00	
<input type="checkbox"/>	0	Schedule Task	118057595	Phase 1.1 Feasibility	10/09/2023 11:42:18	10/23/2023 11:42:18	0 percent	\$.00	
<input type="checkbox"/>	0	Schedule Task	118057597	Phase 1.2 Planning/Pre-Desi...	10/23/2023 11:42:18	11/12/2023 11:42:18	0 percent	\$.00	
<input type="checkbox"/>	0	Schedule Task	118057598	Phase 6.2 EM Closeout	04/30/2024 11:42:16	05/15/2024 11:42:16	0 percent	\$.00	



PROCESS

15) Next, add the **PM Mark Up Fee**.

- To locate this portion of the form, click on the **Budget** tab.

16) In the **Job Cost Billing** section, locate the **PM Markup** field.

- Click on the **magnifying glass**.

<<Upon clicking, the **PM Markup Fee** options will open in a sub-window>>

17) In the **PM Markup** window, click the **radio button** that matches your budget.

- Click on **OK** to save your selection.

IMPORTANT

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General Scope Schedule **Budget** Procurement Contacts Notes & Documents

Activate Calculate Save Save & Close More x

(Optional): Summary of the budget and commitments for the project.

+ Summary

- Job Cost Billing

* PM Markup

+ Current Budget Balance

+ Cost Overview

+ Project Budget

PM Markup Fee

Apply Filters Clear Filters

ID	Description	Markup	Minimum Amount	Maximum Amount
Contains	Contains	Equals	Less Than or Equ	More Than or
<input type="radio"/> 5.00%	\$0-\$500,000	5	\$0.00	
<input type="radio"/> 4.50%	\$500,001-\$1,000,000	4.5	\$500,001.00	
<input type="radio"/> 4.00%	\$1,000,001-\$5,000,000	4	\$1,000,001.00	
<input type="radio"/> 3.50%	\$5,000,001-\$10,000,000	3.5	\$5,000,001.00	
<input type="radio"/> 3.00%	\$10,000,001-\$25,000,000	3	\$10,000,001.00	
<input type="radio"/> 2.50%	\$25,000,001-\$50,000,000	2.5	\$25,000,001.00	
<input type="radio"/> 2.00%	\$50,000,001-\$75,000,000	2	\$50,000,001.00	
<input type="radio"/> 1.75%	\$75,000,001-\$100,000,000	1.75	\$75,000,001.00	\$
<input type="radio"/> 1.50%	\$100,000,001-\$150,000,000	1.5	\$100,000,001.00	\$
<input type="radio"/> 1.25%	\$150,000,001-\$200,000,000	1.25	\$150,000,001.00	\$
<input type="radio"/> 1.00%	Over \$200,000,000	1	\$200,000,001.00	\$999,000,000.00
<input type="radio"/> 0.00%		0	\$0.00	

Items per page: 50 1 - 12 of 12 items 1 of 1 pages



▼ PROCESS

18) 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.

19) 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>>

20) In the **Contact Role Detail** window, click the **Find** button.

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

▼ IMPORTANT

For additional information about adding contacts to projects, please refer to the **Manage External Contacts** OR **Contacts Quick Add** job guides.

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Create a Capital Project

General Scope Schedule Budget Procurement **Contacts** Notes & Documents

(Optional): Maintain a list of Contacts and their roles for the Capital Project.

Contacts

Add Person Remove

Apply Filters Clear Filters

	Role	Person	Work Phone	Fax	Email	Primary Organization
<input type="checkbox"/>	Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	Project Director					
<input type="checkbox"/>	Project Primary Manager					

Items per page: 10 1 - 2 of 2 items

Contact Role: 1094478 - Project Primary Manager-Capital Project

Save Save & Close More x

(Required): Select the contact and their role.

Linked Record

Linked Form Capital Project

Contact

Name ID

Primary Organization

Email Mobile

Work Phone Work Fax

Find Clear

Role

Role Project Primary Manager

Find Clear

Save Save & Close More x



▼ PROCESS

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

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

▼ IMPORTANT

For additional information about adding contacts to projects, please refer to the **Manage External Contacts** OR **Contacts Quick Add** job guides.

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Create a Capital Project

General Scope Schedule Budget Procurement **Contacts** Notes & Documents

(Optional): Maintain a list of Contacts and their roles for the Capital Project.

Contacts

Add Person Remove

Apply Filters Clear Filters

<input type="checkbox"/>	Role	Person	Work Phone	Fax	Email	Primary Organization
	Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	Project Director					
<input type="checkbox"/>	Project Primary Manager					

Items per page: 10

Contact Role: 1094478 - Project Primary Manager-Capital Project

Save Save & Close More x

Employee

Apply Filters Clear Filters

22

21

	Name	Title	Primary Organization
<input type="radio"/>	Aaby,David Alton	Senior Biostatistician	\Organizations\Northwestern
<input type="radio"/>	Aadam,Abdul Aziz	Associate Professor	\Organizations\Northwestern
<input type="radio"/>	Aagaard,Mary-Louise	Retiree Spouse	\Organizations\Northwestern
<input type="radio"/>	Aalsburg,Alan Michael	Core Technician Senior	\Organizations\Northwestern
<input type="radio"/>	Aaron,Robert W	Exec Dir Stu Aff Assess & Plan	\Organizations\Northwestern

Items per page: 50 1 - 50 of 28406 items 1 of 569 pages

OK Cancel



▼ PROCESS

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

23) 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

For additional information about adding contacts to projects, please refer to the **Manage External Contacts** OR **Contacts Quick Add** job guides.

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Create a Capital Project

General Scope Schedule Budget Procurement **Contacts** Notes & Documents

(Optional): Maintain a list of Contacts and their roles for the Capital Project.

Contacts

Apply Filters Clear Filters

<input type="checkbox"/>	!	Role	Person	Work Phone	Fax	Email	Primary Organization
		Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>		Project Director					
<input type="checkbox"/>		Project Primary Manager					

Items per page: 10

23

Save & Close

More x

Contact Role: 1094478 - Aalsburg, Alan Michael - Project Primary Manager - Capital Project

(Required): Select the contact and their role.

Linked Record

Linked Form Capital Project

Contact

NameAalsburg, Alan MichaelID1080304

Primary Organization\Organizations\Northwestern

EmailMobile

Work Phone312/503-3702Work Fax

Role

RoleProject Primary Manager

Save Save & Close More x



▼ PROCESS

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

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

▼ IMPORTANT

For additional information about adding contacts to projects, please refer to the **Manage External Contacts** OR **Contacts Quick Add** job guides.

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Create a Capital Project

General Scope Schedule Budget Procurement **Contacts** Notes & Documents

(Optional): Maintain a list of Contacts and their roles for the Capital Project.

Contacts

Add Person Remove

Apply Filters Clear Filters

Refresh Star Download

<input type="checkbox"/>	!	Role	Person	Work Phone	Fax	Email	Primary Organization
		Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	24	Project Director					
<input type="checkbox"/>	→	Project Primary Manager	Aalsburg,Alan Michael	312/503-3702			Northwestern

Items per page: 10 1 - 2 of 2 items 1 of 1 pages



▼ PROCESS

▼ IMPORTANT

For additional information about adding contacts to projects using the **Contacts Quick Add** function, please refer to the **Contacts Quick Add** job guides.

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Contact Details

Contacts Description

Font Family Font Size Paragraph A ab B I U ABC X x | : : : : | : : : : | : : : : | : : : : |

X Paste Undo Redo Link Unlink Image Insert Table Template Code View Source

For some roles, you can assign only one contact.

* Role	* Name	Organization	Work phone	Fax	Email
Project Director	Type to search Required				
Project Primary Manager	Type to search Required				

New row +



▼ PROCESS

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

25) 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

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Create a Capital Project

General Scope Schedule Budget Procurement **Contacts** Notes & Documents

Print Add to Bookmarks My Bookmarks

25 Create Draft

(Optional): Maintain a list of Contacts and their roles for the Capital Project.

Contacts Add Person Remove

	Role	Person	Work Phone	Fax	Email	Primary Organization
	Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	Project Director	Aaronson,Alexandra Leigh				Northwestern
<input type="checkbox"/>	Project Primary Manager	Aalsburg,Alan Michael	312/503-3702			Northwestern

Items per page: 10 1 - 2 of 2 items 1 of 1 pages



▼ PROCESS

To apply a **Project Template**:

26) From the action buttons (upper right of the form), click on the **More** button.

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

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

28) Select **All Project Templates**,

- Click on the **Radio Button** for the template.
- Click the **Continue** button to confirm the selection.

▼ IMPORTANT

- It is important to save the project as you make any changes using the **Save** button.

Northwestern | FACILITIES CONNECT

Create a Capital Project

Print

Add to Bookmarks

My Bookmarks

General

Scope

Schedule

Budget

Procurement

Contacts

Notes & Documents

Activate

Calculate

Save

Save & Close

More

(Required): Create a Project by entering general information about the project.

General

Details

Units

Environmental

Primary Customer Contact

ID 1001785

Date 04/01/2022

Name Abbott Hall Second Floor MFA Teaching Studio Buildout 2022

Project Reporting Name Abbott Hall Se

Project Type

Project Status

Project Website about:blank

Project Category Capitalized

Accounting Cost Center 812-1370000-80

City Chicago

State/Province IL

Client Lookup

Status Draft

26

27

Apply Template

Copy

Delete

Capital Project Template PopUp:

General

System

Workflow Instance

Associations

(Optional): Select the Capital Project Template to be applied.

Capital Project Templates

28

Continue

Apply Filters

Clear Filters

Items per page: 20

1 - 1 of 1 items

1 of 1 pages

Continue

x

1002169

All Projects Template



▼ PROCESS

29) Click on the **Save** button to save your project with the applied project template.

▼ IMPORTANT

DO NOT Activate the Project. The Project Manger must add their information to the project record before it can be activated.

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Create a Capital Project

Print 29 Add to Bookmarks My Bookmarks

General Scope Schedule Budget Procurement Contacts Notes & Documents

Activate Calculate Save & Close More x

(Required): Create a Project by entering general information about the project.

General

ID 1001785 Status Draft

Date 04/01/2022

Name Abbott Hall Second Floor MFA Teaching Studio Buildout 2022

Project Reporting Name Abbott Hall Second Floor MFA Teaching Studio Buildout 2022

Details

Project Type Project Classification New Construction

Project Status Project Phase 0.0 Initial Request

Project Website about:blank

Project Category Capitalized Chartstring 812-1370000-80041586-02

Accounting Cost Center 812-1370000-80041586-02 Project Cost/SqFt (Budget Current / Project Gross Construction Area) \$.00 US Dollars

Units

Environmental

City Chicago

State/Province IL Country USA

Primary Customer Contact

Client Lookup



▼ PROCESS

30) Finally, send the Project Manger an email with the **Project ID** number and instructions on what information they need to enter.

▼ IMPORTANT

Completion of PROJECT_ID Request 1005-1 for Finance- " Law AV Infra Upgrade 2022 " - Message (HTML)

File Message Help Acrobat

Completed I... Mark Unread Find Zoom

Fw: Completion of PROJECT_ID Request 6803-1 for Facilities Management- " EV Door Pwr FY25 "

Financial Operations
To Project Manager

Capital Project - WT and PO request procedure 10-17-24.docx
16 KB

Dear Tony,

Facilities Connect (FC) ID 1002170 has been created.
Please review and update project information in FC as necessary.

Project Managers are responsible for adding the following information in FC:

- Project Type and Project Classification
- Contacts other than the Primary PM
- Completing the Project Description on the Scope tab
- Identifying the impacted area
- Adding Schedule dates (start, end, etc.)
- Subsequent info such as checklists, status reports, etc.

Attached are instructions on how to request WTs and POs for a Capital Project.

Please let me know if you have any questions, or if there is anything else I can do to help!

Thanks!



▼ PROCESS

The saved project is accessible to the PM 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

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Home

Reminders - Projects

▼ Notices

0 - Action Items

45 - Notifications

▼ Tasks

411 - Overdue Tasks

2 - Tasks Due This Week

1 - Tasks Over Budget

Reminders - Manage Space R...

▼ Requests

6 - My Active Requests

Related Links - Projects

▼ Programs and Funding Sources

View Programs

▼ Projects

Create a Capital Project

My Capital Projects

All Capital Projects

Project Checklists In Revision

Created By	Project Name	Status	Checklist Type	Comment	Created Date/Time
No data to display.					

My Projects - Phase 0.0 Initial Request

Project Name	Project Status	Plan Complete	P
Abbott Hall Second Floor MFA Teaching Studio Buildout 2022			

Items per page: 50 1 - 1 of 1 items 1 of 1 pages

My Projects - Phase 1.0 Feasibility

Project Name	Project Status	Plan Complete	Project Manager	Primary Location
Tech Lab HVAC C...	On Hold		Wright,Teri	

Items per page: 50 1 - 1 of 1 items 1 of 1 pages

My Bookmarks

Project Reports

All Progress Reports

Current Budget Balance (Summary by I

Current Budget Balance (Detail) Report

Project Area Summary

Project Financial Summary

Project Schedule Summary

Project Contact List

Scheduled Task Compliance

Vendor Characteristics Query

Workload by Primary Project Manager I

Space Information

My Responsible Spaces

Northwestern Spaces

Area by Space Class Parent

Assignee Space Report

Building Data

Building Occupant Contact List

Building Occupant Location Contac

Building Occupant List

Department Base Data Report

Version 1.4

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