



Complete a New Project Record



COMPLETE A NEW PROJECT RECORD

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for completing a new project record in Facilities Connect. The Project Manger will take over this process from the Financial administrator who creates the new project record.

The purpose of this document is to serve as guided reference and/or new hire training on completing a new project record, available to all applicable users in Facilities Connect.

VERSION INFORMATION (THIS DOCUMENT)

Version	1.3	Release Date	09/18/2024
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
	1.3	09/18/2024	Updated	NU Facilities
	1.2	0715/2022	Updated	NU Facilities
	1.1	03/04/2022	Updated	NU Facilities
	1.0	02/13/2019	Created	NU Facilities
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▼ GETTING STARTED

- ❖ Creating a new Capital Project is a joint effort with the Facilities Finance group.
- ❖ The process starts once you receive an email confirmation from NUFinancials that the project has been created with a Chartstring.
- ❖ This will trigger Facilities Finance to create the project and apply the necessary Template.

► PROCESS

► 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

Reply Reply All Forward

NUFinancials

To Project Manager

Thu 7/14/2022 2:59 PM

Dear Colleague,

The PROJECT_ID value 80062260 has been assigned by NUFinancials for Law AV Infra Upgrade 2022

Please visit NUFinancials to view this Chartfield Request

Based upon information provided for PROJECT_ID Request 1005 for 80062260

- Fund associated with this Project is 812 (Unrestr Plant Constr - Capital)
- DeptID associated with this Project is 5500000 (Finance)
- Manager is Manager,Project
- An expense budget totaling \$400,000 has been established against Requested Accounts for chart string 812-550000-80062260
- A revenue budget totaling 4400,000 has been established against Account 88505 for chart string 812-550000-80062260
- Project start and end date are 2021-09-01 through 2023-07-30
- Class attribute associated with this PROJECT_ID is 950 (Expenses for Plant)
- the Plant TrsteeUse attribute associated with this Project is Other
- the Plant Purpose attribute associated with this Project is Plant-Chicago
- the Location Code associated with the Activity 01 is 8816

Long Description and other attributes

Infrastructure upgrades to accommodate updates classroom technology in 8 classrooms- new cabling infrastructure (high and low voltage) for hearing assist, microphone arrays, projections systems, and AV control. Teaching wall modifications including passive ventilation for displays. Classrooms are located in Rubloff, Levy Mayer, and McCormick.

To learn more visit the Chartfield Maintenance website or contact Accounting Services at 847-491-5337 or ChartField_request@northwestern.edu.

You are welcome to contact me if you have any questions about this message.

Thank you.

Manager, Accounting Services
Financial Operations
Northwestern University



▼ PROCESS

1) Once a Capital Project has been created in Facilities Connect,

- Finance will send you a confirmation email with the new **Project ID number**.

2) Project managers are responsible for completing the following information in Facilities Connect,

- 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.

► 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

FW: 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 1005-1 for Finance- " Law AV Infra Upgrade 2022 "

Facilities Finance

To Project Manager

Capital Project - WT and PO request procedure 07-01-20.docx 22 KB

Reply

Reply All

Forward

Thu 7/14/2022 3:33 PM

Hi Project Manager,

Facilities Connect (FC) **ID 1001814** been created for the below Capital project.

1) Please review and update project information in FC as necessary.

2) 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.

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

Please let me know if you have any questions.

Manager, Financial Administration
Facilities | Finance & Administration
Northwestern University



▼ PROCESS

To complete the Project Record, log into **Facilities Connect**,

3) Click the **Project Name** link in the Phase 0.0 section

<<Upon clicking, the Project Record will open in a new window>>

▼ IMPORTANT

Do not click the Project View option, as you need to make edits to the Project Record.

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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

3

Project Name

Project Status

Plan Complete

P

Law AV Infra Upgrade 2022

Items per page: 501 - 1 of 1 items1 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: 501 - 1 of 1 items1 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

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▼ 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

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▼ PROCESS

From the **Project Record** screen,

4) Click the **Project Type** drop down arrow

5) Select the **Type**

▼ IMPORTANT

Capital Project: 1001814-Law AV Infra Upgrade 2022

Add To Bookmarks

Print

Help

General

Scope

Schedule

Budget

Procurement

Cash Flow

Contacts

Closeout

Security

Notifications

Notes & Documents

Calendar Details

Calendar

Activate

Calculate

Save

Save & Close

More

x

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

General

ID 1001814

Status Draft

Date 07/08/2022

Name Law AV Infra Upgrade 2022

Project Reporting Name Law AV Infra Upgrade 2022

Details

4 Project Type

Project Classification

Project Phase 0.0 Initial Request

Project Category Academic

Chartstring 812-5500000-80062260-01

5 Administrative

Athletics/Recreation

Housing

City Chicago

State/Province IL

Country USA

Primary Customer Contact

Client Lookup

Address

Zip/Postal Code

City



▼ PROCESS

6) Click the **Project Classification** drop down arrow

7) Select the **Classification**

▼ IMPORTANT

Capital Project: 1001814-Law AV Infra Upgrade 2022

Add To Bookmarks

Print

Help

General

Scope

Schedule

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Contacts

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Security

Notifications

Notes & Documents

Calendar Details

Calendar

Activate

Calculate

Save

Save & Close

More

x

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

General

ID 1001814

Status Draft

Date 07/08/2022

Name Law AV Infra Upgrade 2022

Project Reporting Name Law AV Infra Upgrade 2022

Details

Project Type Academic

Project Status Active

Project Website Abbott Hall Second Floor MFA Teaching Studio Buildout 2018

Project Category Capitalized

Accounting Cost Center 812-5500000-80062260-01

Project Cost/SqFt (Budget Current / Project Gross

Project Classification

New Construction

Major Renovation

Minor Renovation

Systems Replacement

Units

Environmental

City Chicago

State/Province IL

Country USA

Primary Customer Contact

Client Lookup

Address

Zip/Postal Code

City



▼ PROCESS

8) Once the Type and Classification have been entered, add any additional **Contacts**.

• Click the **Contact** tab

<<Upon clicking, the Contacts tab will open in the same screen>>

▼ IMPORTANT

Capital Project: 1001814-Law AV Infra Upgrade 2022

8

Contacts

General Scope Schedule Budget Procurement Cash Flow Security Notifications Notes & Documents Calendar Details Calculator

Activate Calculate Save Save & Close More

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

General

ID 1001814

Status Draft

★ Date 07/08/2022

★ Name Law AV Infra Upgrade 2022

★ Project Reporting Name Law AV Infra Upgrade 2022

Details

Project Type Academic

Project Classification Systems Replacement

Project Status Active

Project Phase 0.0 Initial Request

Project Website

★ Project Category Capitalized

★ Chartstring 812-5500000-80062260-01

Accounting Cost Center 812-5500000-80062260-01

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

Address

Zip/Postal Code

City

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- 13) 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.

The screenshot displays the 'Capital Project: 1001814-Law AV Infra Upgrade 2022' interface. At the top, there's a navigation bar with tabs: General, Scope, Schedule, Budget, Procurement, Cash Flow, **Contacts**, Closeout, Security, Notifications, Notes & Documents, Activate, Calculate, Save, Save & Close, More, and X. Below the navigation bar, a subtitle reads '(Optional): Maintain a list of Contacts and their roles for the Capital Project.'

The main content area is titled 'Contacts'. On the left, there's a sidebar with a 'Role' section containing checkboxes for 'Manager', 'Project Director', and 'Project Primary Manager'. Below this is a 'Contacts Description' section with a rich text editor.

The central part of the screen shows a list of contacts. A modal window is open for adding a new contact. In the modal, there's a dropdown menu set to 'External Contact'. Below it is a table with the following columns: Name, Title, Primary Organization, and Phone. The table lists several contacts, including Kim Abney (Project Executive at MECCOR INDUSTRIES), Alan Armbrust (Architect at STR PARTNERS LLC), Tom Baade (Construction Manager at MORTENSON COMPANY), Chris Bedore (Project Engineer at KELSO-BURNETT CO), Joe Behles (Principal at BEHLES & BEHLES), Jan Behounek (Architect at HOLABIRD & ROOT LLC), and Blair Donald (Architect).

At the bottom of the modal, there's a pagination control showing 'Items per page: 50' and '1 - 50 of 109 items'.



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



<<Upon clicking, the Scope tab will open in the same screen>>

▼ IMPORTANT

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▼ **IMPORTANT**

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

17



▼ PROCESS

16) Scroll down to the **Project Impacted Area** section

• Click the **Add** button

<<Upon clicking, the **All Locations** search pop-up will open>>

17) Use the available **Column Headers / Search Fields** to sort and filter the list of locations to find the desired Building, Floor(s), or Space(s)

18) Once you have found the desired locations, click on the corresponding **check boxes**

19) Click **OK** to select

<<Repeat for all impacted spaces or floors>>

▼ IMPORTANT

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

Capital Project: 1001814-Law AV Infra Upgrade 2022

General

Scope

Schedule

Budget

Procurement

Cash Flow

Contacts

Closeout

Security

Notifications

Notes & Documents

Activate

Calculate

Save

Save & Close

More

Site Information

Site Gross Area

0

acres

Project Gross Construction Area

0

square-feet

Impacted Area (Effective)

0

square-feet

Total Floor Area Ratio

0

Site Usable Area

0

acres

Project Usable Construction Area

0

square-feet

Project Impacted Area

Select From Floor Plan

Add

Remove

All Locations

Apply Filters

Clear Filters

	Campus	Building	Floor	Wing	Name	Type
☐	Contains	Contains	Contains	Contains	Contains	Contains
☐	Chicago Campus	Gary Law Library			Gary Law Library	Building
☐	Chicago Campus	Gary Law Library	01		01	Floor
☐	Chicago Campus	Gary Law Library	01		00119	Space
☐	Chicago Campus	Gary Law Library	01		00120	Space
☐	Chicago Campus	Gary Law Library	01		00120A	Space
☐	Chicago Campus	Gary Law Library	01		00120B	Space
☐	Chicago Campus	Gary Law Library	01		00121	Space

Items per page: 50

1 - 50 of 128 items

1 of 3 pages



▼ PROCESS

20) Once you add the add the Impacted Area(s), the **square-footage** information is automatically calculated under the **Site Information** section

▼ IMPORTANT

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

Capital Project: 1001814-Law AV Infra Upgrade 2022

Add To Bookmarks

Print

Help

General

Scope

Schedule

Budget

Procurement

Cash Flow

Contacts

Closeout

Security

Notifications

Notes & Document

Activate

Calculate

Save

Save & Close

More

x

Site Information

Site Gross Area

0

acres

Site Usable Area

0

acres

Project Gross Construction Area

40816.9909

square-feet

Project Usable Construction Area

0

square-feet

20

Impacted Area (Effective)

40816.9909

square-feet

Project Impacted Area

Select From Floor Plan

Add

Remove

Apply Filters

Clear Filters

Refresh

Star

Download

Print

☐	Campus	Building	Floor	Wing	Name	Type	Hierarchy
☐	Chicago Campus	Gary Law Library			Gary Law Library	Project Impacted Area	\Locations\Chicago Camp...

1 - 1 of 1 items

Parking

Parking Design

Parking Ratio

0

Total Parking Spaces

Covered Parking Space

0

Handicap Parking Spaces

0

Activate

Calculate

Save

Save & Close

More

x



▼ IMPORTANT

- Capital Project: 1001814-Law AV Infra Upgrade FY2022**

Add To Bookmarks Print Help

General Scope **Schedule** Budget Procurement Cash Flow Contacts Closeout Security Notifications Notes & Documents Activate Calculate Save Save & Close More x

(Optional): Describe the scope of the project. This information is used in Progress Reports and for publishing a project website.

Scope

Font Family Font Size Paragraph A ab B I U ABC X x² | List Bulleted Numbered Indented | Columns | Styles | Undo Redo | Paste | HTML | Print

Infrastructure upgrades to accommodate updates classroom technology in 8 classrooms- new cabling infrastructure (high and low voltage) for hearing assist, microphone arrays, projections systems, and AV control. Teaching wall modifications including passive ventilation for displays. Classrooms are located in Rubloff, Levy Mayer, and McCormick.

Site Information

Site Gross Area	0	acres		Site Usable Area	0	acres
Project Gross Construction Area	0	square-feet		Project Usable Construction Area	0	square-feet
Impacted Area (Effective)	0	square-feet				
Total Floor Area Ratio	0					

Project Impacted Area

Select From Floor Plan Add Remove

Apply Filters Clear Filters Refresh Star Filter Icon

Campus	Building	Floor	Wing	Name	Type	Hierarchy	Area
No data to display							



From the Schedule tab,

- ▼ IMPORTANT**

- For additional information about the Gantt Chart, please refer to the **Gantt Chart Functionality** job guide.
- For additional information about how to request Work Tasks and POs, please refer to the **Request Procedures** job guide attached to the Facilities Finance email.

NOW VIEWING PROJECT RECORD > SCHEDULE TAB

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▼ PROCESS

Once you add all necessary updates to the Project Record,

25) Click the **Save** button

26) Click the **Activate** button

▼ IMPORTANT

Capital Project: 1001814-Law AV Infra Upgrade 2022

General

Scope

Schedule

Budget

Procurement

Cash Flow

Contacts

Closeout

Security

Notifications

Notes

25

Activate

Calculate

26

Save

Save & Close

More

x

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

Summary

Plan Start07/08/202225xPlan EndActual StartActual EndCalculated Start07/08/2022Calculated End10/25/2022Time Zone(GMT -6) Central Time (US, Canada) [US/Central]xCalculate Project FromStart

Project Tasks Gantt

Zoom to month

Show Baseline

#	ID	Task Name	Planned Start	Planned End	Planned Duration	To
x	0 85470	Phase 0.0 Initial Rec	07/08/2022 14:56:3	07/26/2022 14:56:3	2 Weeks 3 Days 23 Hour	80
x	0 85470	Phase 1.0 Feasibility	07/26/2022 14:56:3	08/09/2022 14:56:3	2 Weeks	80
x	0 85470	Phase 2.0 Design	08/09/2022 14:56:3	08/29/2022 14:56:3	2 Weeks 6 Days	80
x	0 85470	Phase 3.0 Construct	08/29/2022 14:56:3	09/13/2022 14:56:3	2 Weeks 23 Hours	80
x	0 85470	Phase 4.0 Construct	09/13/2022 14:56:3	09/27/2022 14:56:3	1 Week 6 Days 23 Hours	80
x	0 85470	Phase 5.0 Operation	09/27/2022 14:56:3	10/11/2022 14:56:3	1 Week 6 Days 23 Hours	80
x	0 85470	Phase 6.0 Close-Ou	10/11/2022 14:56:3	10/25/2022 14:56:3	1 Week 6 Days 23 Hours	80

... July 2022

August 2022

September 2022

Version 1.3

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▼ PROCESS

The saved project is now accessible 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

Northwestern | FACILITIES CONNECT

Home

Reminders - Projects

Notices

Tasks

Reminders - Manage Space R...

Requests

Related Links - Projects

Programs and Funding Sources

Projects

Project Checklists In Revision

My Projects - Phase 0.0 Initial Request

My Projects - Phase 1.0 Feasibility

Project Reports

Space Information

Project Name

Project Status

Plan Complete

Law AV Infra Upgrade 2022

Items per page: 50

1 - 1 of 1 items

1 of 1 pages

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

All Progress Reports

Current Budget Balance (Summary by I

Current Budget Balance (Detail) Report

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Project Schedule Summary

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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