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)

Version	**1.1**	Release Date	**2/8/2019**
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 (2/8/19)**		

REVISION HISTORY

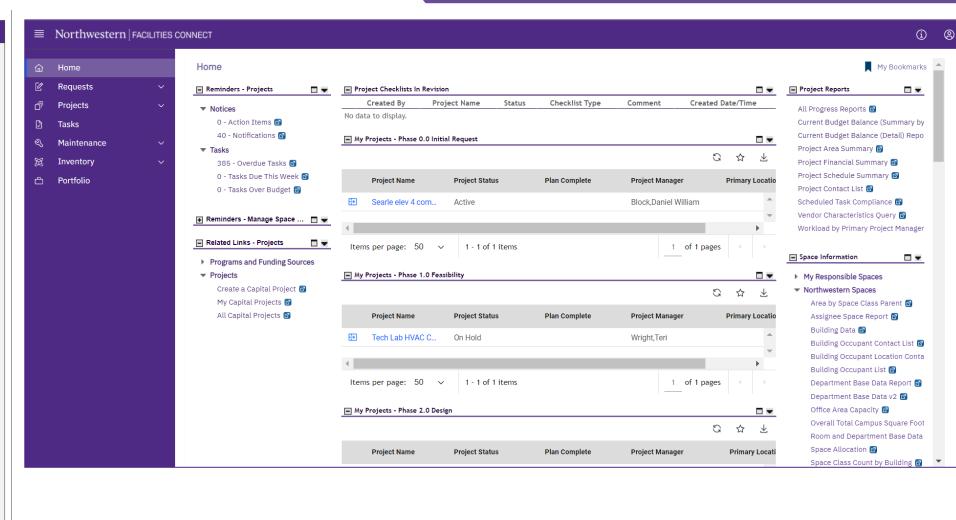|	Version	Release Date	Action	Owner
Most Recent →	1.1	03/04/2022	Updated	NU Facilities
	1.0	02/08/2019	Created	NU Facilities
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	--	--	--	--
	--	--	--	--

▼ 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**:

   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, <u>do not</u> reapply at this stage

▶ PROCESS

▶ IMPORTANT

Northwestern | FACILITIES CONNECT

Home

- 🏠 Home
- ✏️ Requests
- 🗐 Projects
- 📄 Tasks
- 🔧 Maintenance
- 🔲 Inventory
- 💼 Portfolio

Home

My Bookmarks

⊟ Reminders - Projects

▼ Notices
- 0 - Action Items
- 40 - Notifications

▼ Tasks
- 385 - Overdue Tasks
- 0 - Tasks Due This Week
- 0 - Tasks Over Budget

⊞ Reminders - Manage Space ...

⊟ Related Links - Projects

▸ Programs and Funding Sources
▼ 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	Project Manager	Primary Locatio
Searle elev 4 com...	Active		Block,Daniel William	

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 Locatio
Tech Lab HVAC C...	On Hold		Wright,Teri	

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

⊟ My Projects - Phase 2.0 Design

Project Name	Project Status	Plan Complete	Project Manager	Primary Locati

⊟ Project Reports

- All Progress Reports
- Current Budget Balance (Summary by
- Current Budget Balance (Detail) Repo
- 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 Conta
- Building Occupant List
- Department Base Data Report
- Department Base Data v2
- Office Area Capacity
- Overall Total Campus Square Foot
- Room and Department Base Data
- Space Allocation
- Space Class Count by Building

▼ GETTING STARTED

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

▶ **PROCESS**

▶ **IMPORTANT**

Northwestern | FACILITIES CONNECT

Home

- 🏠 Home
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- 🗐 Projects ∨
- 📄 Tasks
- 🔧 Maintenance ∨
- 🗓 Inventory ∨
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     Office Area Capacity
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     Room and Department Base Data
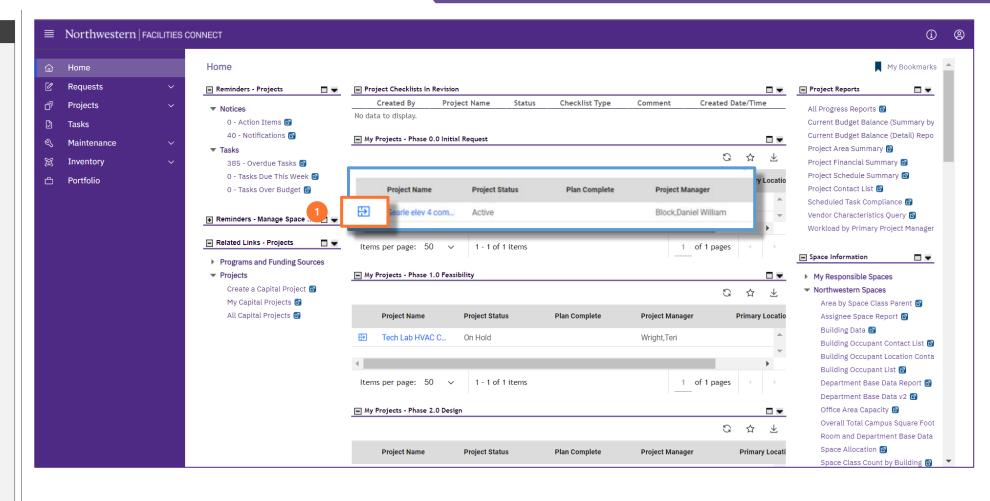   Space Allocation
     Space Class Count by Building

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

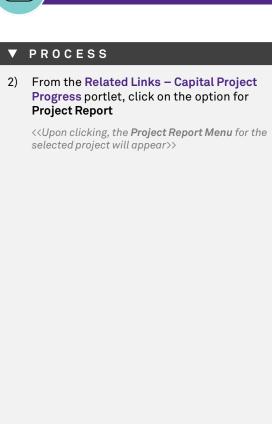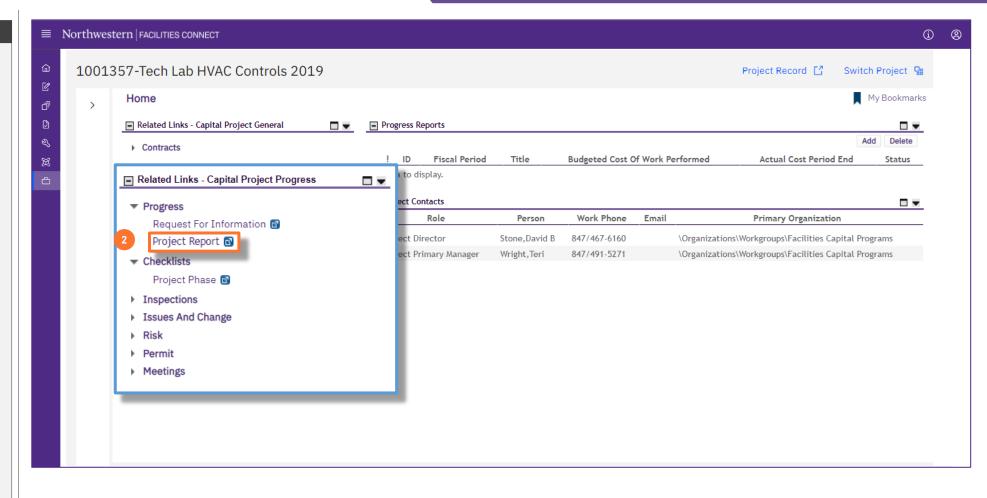   *<<Upon clicking, the **Project Focus** for the selected project will appear>>*
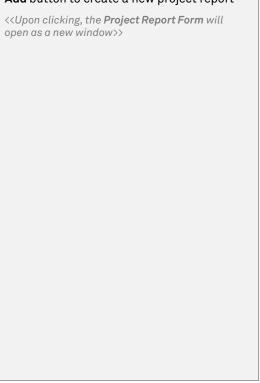
▶ IMPORTANT

Northwestern | FACILITIES CONNECT

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1 ⊞	Searle elev 4 com...	Active		Block,Daniel William	

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

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

My Projects - Phase 2.0 Design

Project Name	Project Status	Plan Complete	Project Manager	Primary Locati

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    - Overall Total Campus Square Foot
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    - Space Class Count by Building

NOW VIEWING | PROJECT INFORMATION (PROJECT FOCUS)

▼ **PROCESS**

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>>

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1001357-Tech Lab HVAC Controls 2019

Project Record 🔗   Switch Project 🔳

Home   🔖 My Bookmarks

⊟ Related Links - Capital Project General   ⊟ Progress Reports   🔳 ▼

▶ Contracts   Add   Delete

                                    !   ID   Fiscal Period   Title   Budgeted Cost Of Work Performed   Actual Cost Period End   Status

                                    to display.

⊟ Related Links - Capital Project Progress   🔳 ▼

                                    ct Contacts   🔳 ▼

▼ Progress   Role   Person   Work Phone   Email   Primary Organization

  Request For Information 🔲   ct Director   Stone,David B   847/467-6160   \Organizations\Workgroups\Facilities Capital Programs

② Project Report 🔲   ct Primary Manager   Wright,Teri   847/491-5271   \Organizations\Workgroups\Facilities Capital Programs

▼ Checklists

  Project Phase 🔲

▶ Inspections

▶ Issues And Change

▶ Risk

▶ Permit

▶ Meetings

▶ **IMPORTANT**

NOW VIEWING | PROJECT REPORT MENU

PROCESS

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
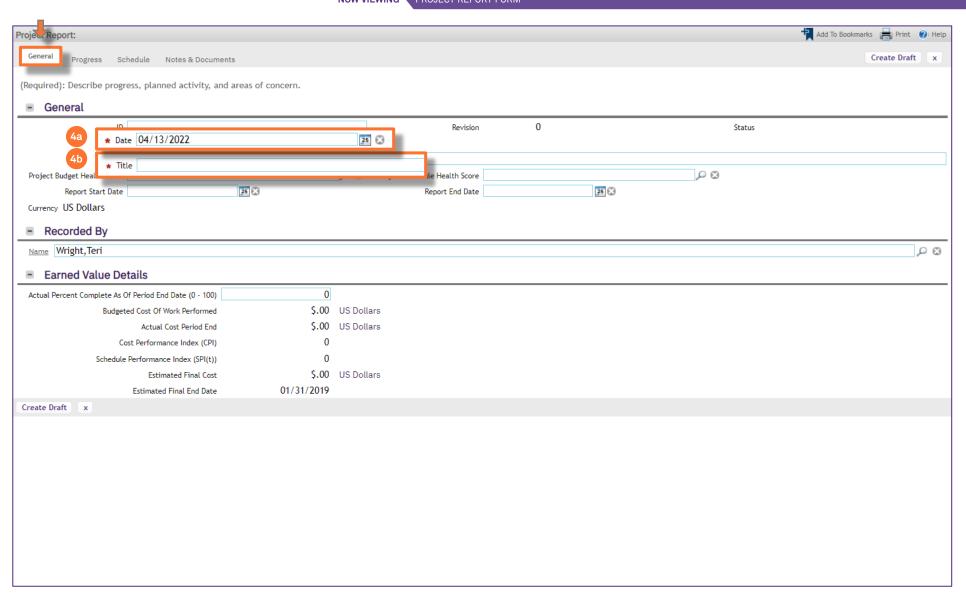
Northwestern | FACILITIES CONNECT

1001357-Tech Lab HVAC Controls 2019

Project Record   Switch Project

Project Report

Add to Bookmarks   My Bookmarks

Popup View

3   Add   Delete

Project Reports   Apply Filters   Clear Filters

	!	ID	Fiscal Period	Title	Budgeted Cost Of Work Performed	Actual Cost Period End	Status

No data to display

Items per page: 50   0 of 0 items   1   of 1 pages

NOW VIEWING   PROJECT REPORT FORM

PROCESS

4) Begin on the **General** tab of the **Project Report Form**

   a) 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

   b) 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

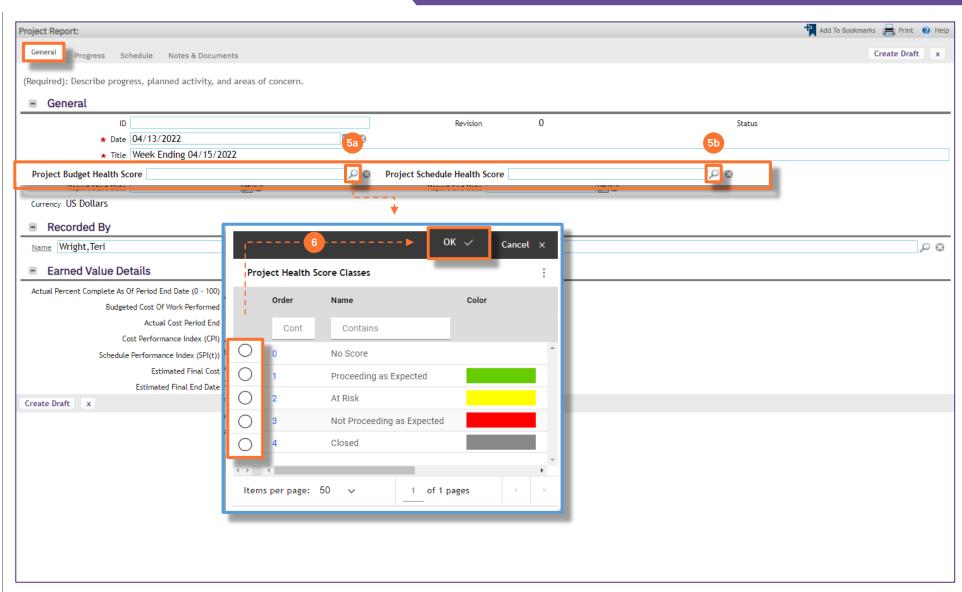- **Project Reports** should be completed weekly (by COB each Thursday)

Project Report:

Add To Bookmarks   Print   Help

| General | Progress | Schedule | Notes & Documents |

Create Draft   x

(Required): Describe progress, planned activity, and areas of concern.

General

ID

Revision   0   Status

4a ★ Date 04/13/2022   [25] ⊗

4b ★ Title

Project Budget Heal...   ...le Health Score

Report Start Date   [25] ⊗   Report End Date   [25] ⊗

Currency US Dollars

Recorded By

Name Wright, Teri

Earned Value Details

Actual Percent Complete As Of Period End Date (0 - 100)	0	
Budgeted Cost Of Work Performed	$.00	US Dollars
Actual Cost Period End	$.00	US Dollars
Cost Performance Index (CPI)	0	
Schedule Performance Index (SPI(t))	0	
Estimated Final Cost	$.00	US Dollars
Estimated Final End Date	01/31/2019	

Create Draft   x

NOW VIEWING PROJECT REPORT FORM

PROCESS

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
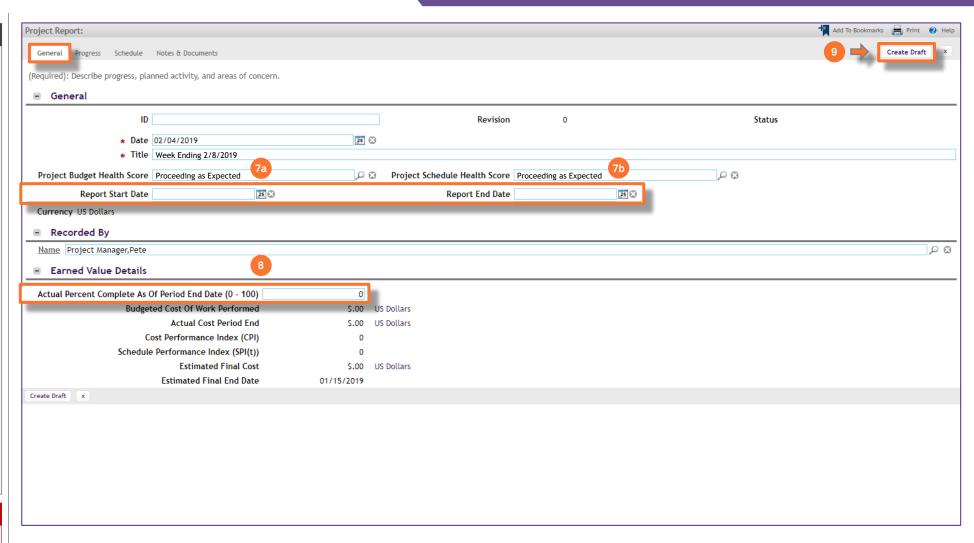
IMPORTANT

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

Project Report:

Add To Bookmarks | Print | Help

General | Progress | Schedule | Notes & Documents

Create Draft | x

(Required): Describe progress, planned activity, and areas of concern.

General

ID		Revision	0	Status
★ Date	04/13/2022			
★ Title	Week Ending 04/15/2022			

Project Budget Health Score [ ] 🔍 ✕   Project Schedule Health Score [ ] 🔍 ✕

Report Start Date   Report End Date

Currency US Dollars

Recorded By

Name | Wright,Teri

Earned Value Details

Actual Percent Complete As Of Period End Date (0 - 100)
Budgeted Cost Of Work Performed
Actual Cost Period End
Cost Performance Index (CPI)
Schedule Performance Index (SPI(t))
Estimated Final Cost
Estimated Final End Date

Create Draft | x

---

6 → **OK** ✓ Cancel ✕

Project Health Score Classes   ⋮

	Order	Name	Color
	Cont	Contains	
◯	0	No Score	
◯	1	Proceeding as Expected	🟩
◯	2	At Risk	🟨
◯	3	Not Proceeding as Expected	🟥
◯	4	Closed	⬛

Items per page: 50 ⌄   1 of 1 pages

NOW VIEWING — PROJECT REPORT FORM

PROCESS

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**
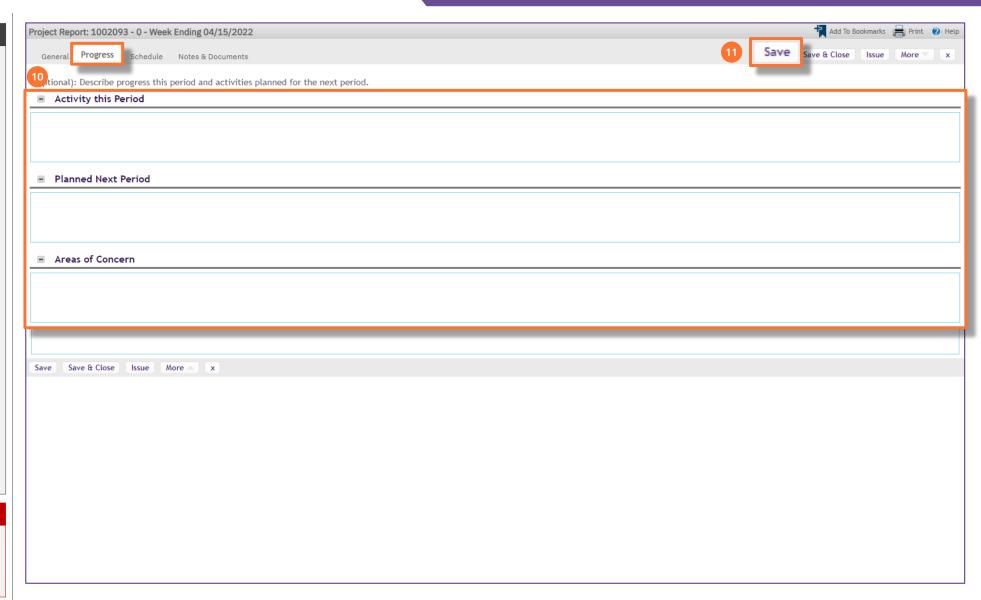
IMPORTANT

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

Project Report:

Add To Bookmarks   Print   Help

General   Progress   Schedule   Notes & Documents

9 → Create Draft   x

(Required): Describe progress, planned activity, and areas of concern.

General

ID		Revision 0 Status
★ Date	02/04/2019	
★ Title	Week Ending 2/8/2019	
Project Budget Health Score	Proceeding as Expected **7a**	Project Schedule Health Score Proceeding as Expected **7b**
Report Start Date		Report End Date
Currency	US Dollars	

Recorded By

Name   Project Manager,Pete

8

Earned Value Details

Actual Percent Complete As Of Period End Date (0 - 100)		0
Budgeted Cost Of Work Performed	$.00	US Dollars
Actual Cost Period End	$.00	US Dollars
Cost Performance Index (CPI)	0	
Schedule Performance Index (SPI(t))	0	
Estimated Final Cost	$.00	US Dollars
Estimated Final End Date	01/15/2019	

Create Draft   x

NOW VIEWING PROJECT REPORT FORM

▼ PROCESS

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**

11) As you summarize your project, use the **Save button** (upper right) to save your work both intermittently and before leaving the **Progress** tab
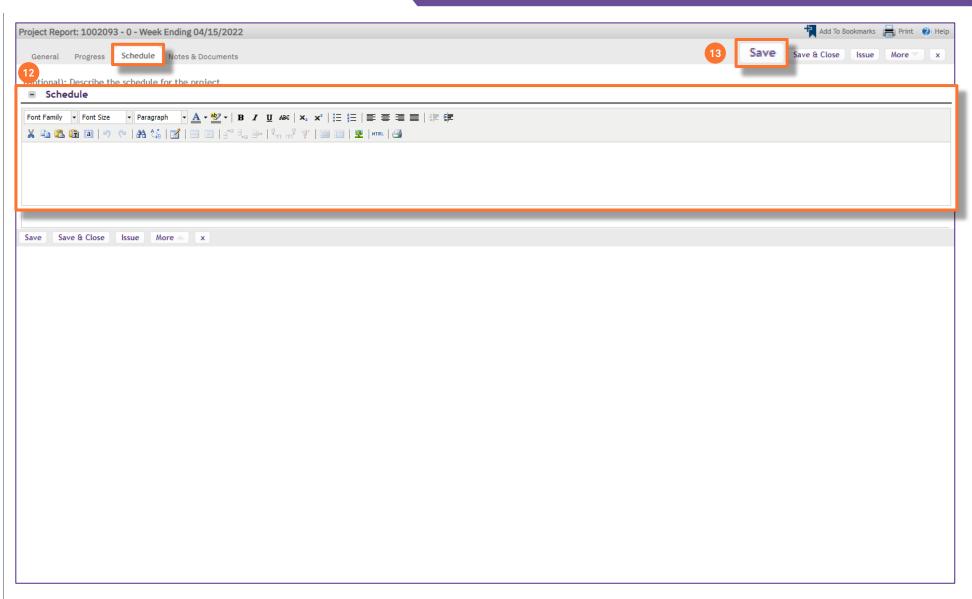
▼ IMPORTANT

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

Project Report: 1002093 - 0 - Week Ending 04/15/2022

Add To Bookmarks   Print   Help

General   **Progress**   Schedule   Notes & Documents

11 Save   Save & Close   Issue   More   x

10 (optional): Describe progress this period and activities planned for the next period.

− Activity this Period

− Planned Next Period

− Areas of Concern

Save   Save & Close   Issue   More ▲   x

NOW VIEWING   PROJECT REPORT FORM

▼ PROCESS

12) 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)

13) As you update your project report, use the **Save button** (upper right) to save your work before leaving the **Schedule** tab
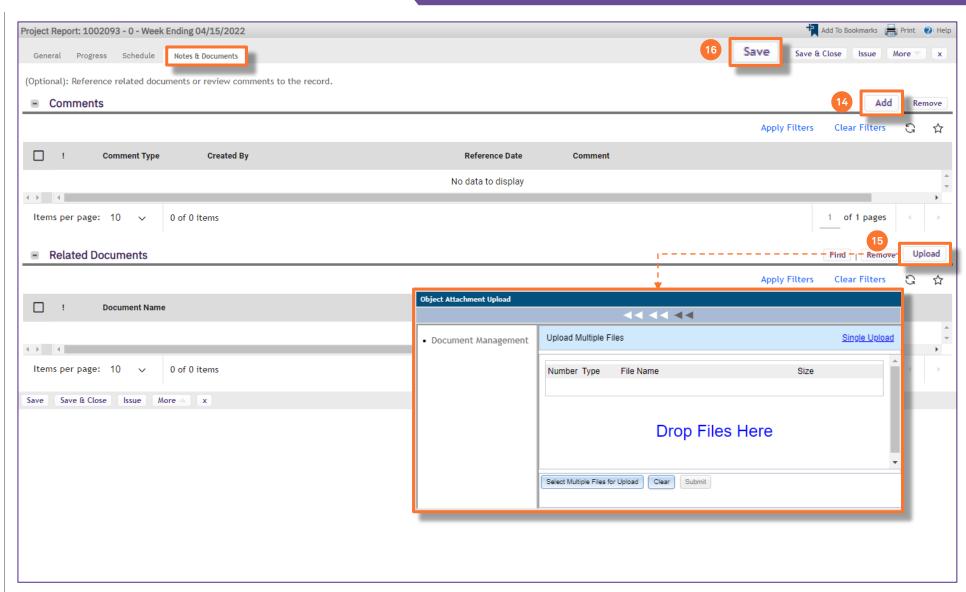
▼ IMPORTANT

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

Project Report: 1002093 - 0 - Week Ending 04/15/2022

Add To Bookmarks   Print   Help

General   Progress   **Schedule**   Notes & Documents

13   Save   Save & Close   Issue   More   x

12 (optional): Describe the schedule for the project

Schedule

Font Family | Font Size | Paragraph | A ▾ | ab ▾ | B I U ABC | x₂ x² | list | align | indent

Save   Save & Close   Issue   More   x

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PROCESS

14) 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 and complete the **Comment form**

15) 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 (<u>does not</u> 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)

16) As your project report, use the **Save** button (upper right) to save your work

IMPORTANT

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

Project Report: 1002093 - 0 - Week Ending 04/15/2022

Add To Bookmarks | Print | Help

General | Progress | Schedule | **Notes & Documents**   (16) **Save** | Save & Close | Issue | More | x

(Optional): Reference related documents or review comments to the record.

Comments

(14) **Add** | Remove

Apply Filters | Clear Filters

	!	Comment Type	Created By	Reference Date	Comment

No data to display

Items per page: 10   0 of 0 items   1 of 1 pages

Related Documents

(15) Find | Remove | **Upload**

Apply Filters | Clear Filters

	!	Document Name

Items per page: 10   0 of 0 items

Save | Save & Close | Issue | More | x

Object Attachment Upload

◄◄ ◄◄ ◄◄

- Document Management

Upload Multiple Files   Single Upload

Number	Type	File Name	Size

Drop Files Here

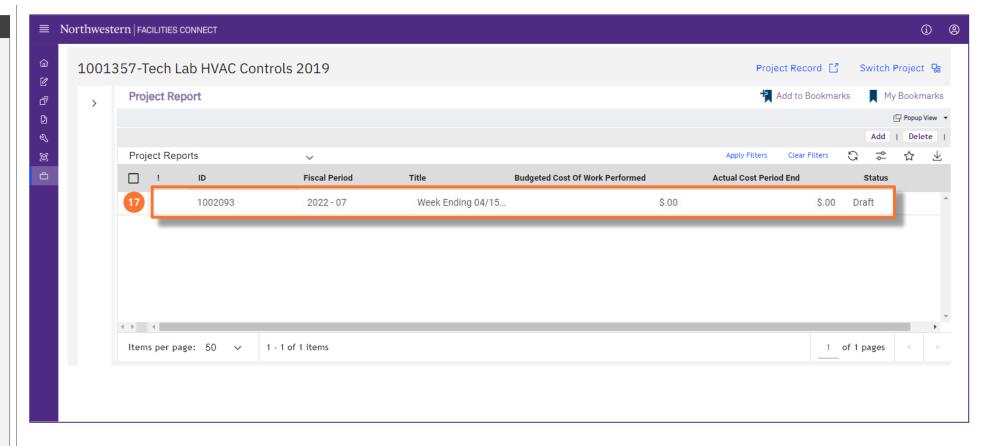Select Multiple Files for Upload | Clear | Submit

NOW VIEWING   PROJECT REPORT MENU

PROCESS

17) Once saved, the **Project Report** will appear as a new record on the **Project Report Menu** and can be accessed at any time

IMPORTANT

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

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1001357-Tech Lab HVAC Controls 2019

Project Record ⧉   Switch Project ⊞

Project Report   📌 Add to Bookmarks   🔖 My Bookmarks

⧉ Popup View ▾

Add | Delete |

Project Reports   ▾   Apply Filters   Clear Filters ↻ ⚙ ☆ ⤓

☐	!	ID	Fiscal Period	Title	Budgeted Cost Of Work Performed	Actual Cost Period End	Status
		1002093	2022 - 07	Week Ending 04/15...	$.00	$.00	Draft

Items per page: 50 ▾   1 - 1 of 1 items   1 of 1 pages   ◀ ▶