Basic Navigation / Project Walkthrough

PM MODULE BASIC NAVIGATION / PROJECT WALKTHROUGH

DOCUMENT SUMMARY

This job guide provides an overview for basic navigation of the Facilities Connect Project Management module (PM Module), as well as project information accessible to all PM Module user groups.

The purpose of this document is to serve as guided reference and/or new hire training for navigating the Facilities Connect PM Module and viewing individual project information.

Note: The Facilities Connect screen shots in this guide were taken as the Project Manager role. Exact screen views and options may differ slightly depending on your individual user role.

VERSION INFORMATION (THIS DOCUMENT)

Version	**1.1**	Release Date	**03/04/2022**
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 (3/14/19)**

REVISION HISTORY

	Version	Release Date	Action	Owner
Most Recent →	1.1	03/04/2022	Updated	NU Facilities
	1.0	03/14/2019	Created	NU Facilities
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Basic Navigation

This section will highlight the primary screens of the Facilities Connect PM Module, and the information, options, and functionality accessible on each screen

NOW VIEWING — HOME SCREEN (COMPANY FOCUS)

▼ GENERAL NAVIGATION

To begin, access Facilities Connect and arrive on the **Facilities Connect Home Screen**

A. The **Portal Sections** provide general navigation across Facilities Connect; the selected tab will be highlighted in light purple

- **Home Tab (selected)** – Provides general access in which the user may:

  - Create a New Project

    Note: This option is not available for the Support Team Member user role

  - Access and modify his/her existing projects

  - Access and view all existing NU projects

  - View the 'My Projects' queue and directly access his/her existing projects by current phase

  - Access pre-configured Project Reports

- **Portfolio Tab** – Provides additional access in which the user may:

  - View external companies (e.g. vendors)

  - Add and manage external contacts (e.g. vendor contacts)

▶ PROJECT INFORMATION

▶ IMPORTANT

NOW VIEWING HOME SCREEN (COMPANY FOCUS)

▼ G E N E R A L   N A V I G A T I O N

C. The **Related Links - Projects** portlet contains links to the following:

- **Create a Capital Project** –Launches the form to initiate a new project

  Note: This option is not available for the Support Team Member user role

- **My Capital Projects** –Provides a clickable list of all projects associated with the current user

- **All Capital Projects** –Provides a clickable list of all NU Facilities projects (read only access for those projects which the user is not associated)

D. The **'My Projects'** portlets provide clickable access to the user's associated projects, grouped by the current project phase (each portlet can be either expanded or collapsed)

E. The **Project Reports** portlet provides a collection of pre-configured, sortable and filterable project management module reports

▶ P R O J E C T   I N F O R M A T I O N

▶ I M P O R T A N T

Northwestern | FACILITIES CONNECT

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 Requests
- ▼ Requests
  - 6 - My Active Requests

C

Related Links - Projects
- ▼ Programs and Funding Sources
  - View Programs
- ▼ Projects
  - Create a Capital Project
  - My Capital Projects
  - All Capital Projects

D

My Bookmarks

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 Location

No data to display

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

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

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

My Projects - Phase 3.0 Construction Procurement

My Projects - Phase 4.0 Construction

E

Project Reports
- All Progress Reports
- Current Budget Balance (Summary by PM) Report
- Current Budget Balance (Detail) Report – All Proje
- Project Area Summary
- Project Financial Summary
- Project Schedule Summary
- Project Contact List
- Scheduled Task Compliance
- Vendor Characteristics Query
- Workload by Primary Project Manager

▶ My Responsible Spaces
▼ Northwestern Spaces
- Area by Space Class Parent
- Assignee Space Report
- Building Data
- Building Occupant Contact List
- Building Occupant Location Contact List
- 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
- Space Allocation
- Space Class Count by Building
- Space Report by Building
- Job Cost Summary and Detail Report - Summari
- Campus Mapping

NOW VIEWING   HOME SCREEN (COMPANY FOCUS)

▼ GENERAL NAVIGATION

B. The **Focus** option allows the user to toggle the screen view / available options, and provides a quick link for project search functionality (the selected focus will be highlighted in light purple)

- **Company Focus (default view)** – Provides a view and functionality <u>across a user's portfolio of projects</u>

- **Project Focus** – Provides a view and functionality for managing <u>within a selected project</u>. Access this by clicking on Project Focus button to the right of the project name.

▶ PROJECT INFORMATION

▶ IMPORTANT

Northwestern | FACILITIES CONNECT

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 Requests

▼ 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	Project Manager	Primary Location
		No data to display		

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

My Projects - Phase 1.0 Feasibility

			Project Manager	Primary Location
	Abbott Hall Second Floor ...		Aalsburg,Alan Michael	
	Tech Lab HVAC Controls ...	On Hold	Wright,Teri	

Items per page: 50   1 - 2 of 2 items   1 of 1 pages

My Projects - Phase 2.0 Design

Project Name	Project Status	Plan Complete	Project Manager	Primary Location
Mudd Hall 4 & 5 Buildout	Active		Wright,Teri	

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

My Projects - Phase 3.0 Construction Procurement

My Projects - Phase 4.0 Construction

My Bookmarks

Project Reports

All Progress Reports
Current Budget Balance (Summary by PM) Report
Current Budget Balance (Detail) Report – All Proje
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 List
  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
  Space Allocation
  Space Class Count by Building
  Space Report by Building
Job Cost Summary and Detail Report - Summari
Campus Mapping

NOW VIEWING HOME SCREEN (PROJECT FOCUS)

▼ GENERAL NAVIGATION

When a project is viewed in **Project Focus**, new options / actions will become available

F. Click on **Project Record** to quickly access the full Project Record window.

G. The **Switch Project** button allows the user to search and select a project for **Project Focus**

H. The **Related Links – Capital Project Progress** portlet provides several clickable options for managing the selected project, including:

- **Request For Information** – Add and attach an RFI to the project

- **Project Report** – Create an interim (e.g. weekly) project report

- **Project Phase Checklist**– Apply or update a project phase checklist

- **Punchlist** – Add a punch list to the project

- **Issue Item** – Document an issue associated with the project

- **Potential Change Order** – Develop a potential change order for the project

- **Risk Item** – Document a risk associated with the project

- **Permit Record** – Add a permit to the project

- **Meeting Record** – Document a project meeting (e.g. weekly status report) and upload supporting documents

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Northwestern | FACILITIES CONNECT

1001785-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022

F Project Record ⬈   **G** Switch Project ⊞

Home

Related Links - Capital Project General

▶ Contracts

H Related Links - Capital Project Progress

▼ Progress
   Request For Information 🔳
   Project Report 🔳
▼ Checklists
   Project Phase 🔳
▼ Inspections
   Punchlist 🔳
▼ Issues And Change
   Issue Item 🔳
   Potential Change Order 🔳
▼ Risk
   Risk Item 🔳
▼ Permit
   Record 🔳
▼ Meetings
   Meeting Record 🔳

Progress Reports

Add Delete

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

No data to display.

Project Contacts

Role	Person	Work Phone	Email	Primary Organization
Project Director	Stone,David B	847/467-6160		\Organizations\Workgroups\Facilities Capital Programs
Project Manager	Wright,Teri	847/491-5271		\Organizations\Workgroups\Facilities Capital Programs
Project Primary Manager	Aalsburg,Alan Michael	312/503-3702		\Organizations\Northwestern

NOW VIEWING | PORTFOLIO SCREEN

▼ GENERAL NAVIGATION

The **Portfolio Portal Tab** provides new options including the ability to search **External Companies** and update **External Contacts**

I. The **Organizations** portlet contains a clickable link to search and view **External Companies** (e.g. vendors)

J. The **People** portlet contains a clickable link to view and update **External Contacts** (e.g. vendor contacts)

  - Once an **External Contact** has been added and associated with an **External Company**, he/she can be added to a project (via the project's **Contacts** tab), and classified in a specific role (e.g. General Contractor)

▶ PROJECT INFORMATION

▶ IMPORTANT

Northwestern | FACILITIES CONNECT

- Home
- Requests
- Projects
- Tasks
- Maintenance
- Inventory
- Portfolio

Portfolio

Add to Bookmarks   My Bookmarks

Geography

Locations

Property
Buildings
Land
Structures
Floors
Spaces

Organizations

My Company
Divisions
Departments
External Companies
Workgroups

People

People

Employees
External Contacts

Specifications

Building Equipment
Consumables
Tools & Test Equipment
Vehicles

Assets

Building Equipment
Keys
Tools & Test Equipment
Vehicles

Project Walkthrough

This section will walkthrough the information available within a selected Project Record, including how information is organized and where it is located

▼ PROJECT INFORMATION

Within a **Project Record**, the **General** tab organizes basic project information and details in the following sections:

A. General

- **Date** is the project creation date

- **Name** contains the project name

- **Project Reporting Name** defaults to project name in the **Name** field, but can be changed to an alternate project name (e.g. a sponsor / donor naming rights)

B. Details

- **Project Type** identifies the university function served by the project (e.g. academic, athletic, administrative)

- **Project Classification** identifies the work classification of the project (e.g. renovation, new construction, systems replacement)

- **Project Status** indicates the current status of the project (e.g. active, future, on-hold)

- **Project Phase** displays the current phase of the project (e.g. design, construction, closeout)

- **Project Category** identifies if the project is Capitalized (i.e. has a capital project chartsting) or Non-Capitalized (i.e. does not have a capital project chartstring)

- **Chartstring (if applicable)** contains the capital chartstring for the project

▶ IMPORTANT

Capital Project: 1001785-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022

Add To Bookmarks | Print | Help

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

Activate | Save | Save & Close | More | x

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

─ General Ⓐ

ID 1001785   Status Revision In Progress

★ 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 Academic   Project Classification New Construction

Project Status Active   Project Phase 1.0 Feasibility & Pre-Design

Project Website

★ 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

+ Primary Customer Contact

+ Primary Location   Find | Clear

+ Primary Location Graphic

+ Site Address

+ Project Address

+ Recorded By

Activate | Save | Save & Close | More | x

NOW VIEWING   CAPITAL PROJECT FORM > GENERAL TAB

▼ PROJECT INFORMATION

*<<Scroll down to **Primary Customer Contact**>>*

C. Primary Customer Contact

- **Primary Customer Contact** displays the primary NU customer contact for the project (as designated by the Project Manager) with the individual's contact information

D. Primary Location

- **Primary Location** displays the primary project location on campus for the project (e.g. building, floor, lot).

  Note: In cases such as a new construction or campus infrastructure project, where the location is not clearly defined in Facilities Connect, a generic location such as **Evanston Campus** or **Chicago Campus** may be used in to represent the project's Primary Location

▶ IMPORTANT

Capital Project: 1001785-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022   Add To Bookmarks   Print   Help

General   Scope   Schedule   Budget   Procurement   Contacts   Notes & Documents   Activate Save Save & Close More x

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

⊕ **General**

⊕ **Details**

⊕ **Units**

⊕ **Environmental**

⊖ **Primary Customer Contact**   **C**

Client Lookup	Winters,Rita Buckman
Address	357 E Chicago Ave Levy Mayer Mezzanine 88
Zip/Postal Code	60611
City	CH
State/Province	IL
Email	
Department	Northwestern

Country | USA
Phone | 312/503-0588
Job Title | Associate Dean of Administration & Finance

⊖ **Primary Location**   **D**   Find | Clear

★ Location Path   \Locations\Chicago Campus\Abbott Hall\02

Campus   Chicago Campus   Floor   02

Building   Abbott Hall

⊕ **Primary Location Graphic**

⊕ **Site Address**

⊕ **Project Address**

⊕ **Recorded By**

Activate Save Save & Close More x

NOW VIEWING CAPITAL PROJECT FORM > SCOPE TAB

▼ PROJECT INFORMATION

The **Scope** tab organizes details about project scope, site information, impacted area(s), and parking buildout information (if applicable)

E. Scope

- **Scope Description** is a free text field for the Project Manager to summarize project scope, assumptions, and other important notations

F. Site Information

- **Site Information Fields** display area metrics for the project site and impacted areas; these values auto-populate in Facilities Connect based on project inputs, and can be adjusted by the Project Manager to reflect actuals

G. Project Impacted Area

- **Project Impacted Area(s) List** outlines the physical space(s) designated by the Project Manager as 'Impacted' by work occurring on the selected project

H. Parking

- **Parking Information Fields** display design information and volume metrics for the parking component of a project (if applicable)

▶ IMPORTANT

Capital Project: 1001785-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022

Add To Bookmarks   Print   Help

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

Activate 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 (E)

Font Family | Font Size | Paragraph | A | B I U ABC x² x² | lists | align |

Interior buildout for multi disciplinary departments within the School of Arts.

— Site Information (F)

Site Gross Area	0	acres	
Project Gross Construction Area	21377.6617	square-feet	
Impacted Area (Effective)	21377.6617	square-feet	
Total Floor Area Ratio	0		

Site Usable Area	0	acres
Project Usable Construction Area	0	square-feet

— Project Impacted Area (G)   Select From Floor Plan | Add | Remove

Apply Filters   Clear Filters

	Campus	Building	Floor	Wing	Name	Type	Hierarchy	Area
☐	Chicago Campus	Abbott Hall	02		02	Project Impacted Area	\Locations\Chicago Camp...	21377.6(
								21377.6(

1 - 1 of 1 items

— Parking (H)

Parking Design		
Total Parking Spaces	0	
Handicap Parking Spaces	0	

Parking Ratio	0
Covered Parking Space	0

Activate Save Save & Close More x

▼ PROJECT INFORMATION

The **Schedule** tab organizes project schedule details in terms of both individual project phases and overall project duration

I. **Summary**

- **Summary** contains the project's planned and actual start/end dates, as well as calculated start/end dates based on individual project phases and dependencies outlined below

J. **Project Tasks Gantt**

- **Project Tasks Gantt** provides a visual representation of the project calendar (in the form of a Gantt chart), showing individual project phase durations and dependencies

▶ IMPORTANT

Capital Project: 1001785-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022   Add To Bookmarks   Print

General   Scope   **Schedule**   Budget   Procurement   Contacts   Notes & Documents   Activate   Save   Save & Close   More

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

⊟ Summary   (I)   Import From MS Project | Export To MS Project

Plan Start 04/15/2022	Plan End
Actual Start	Actual End
Calculated Start 04/15/2022	Calculated End 12/22/2022
★ Time Zone (GMT -6) Central Time (US, Canada) [US/Central]	★ Calculate Project From Start

⊟ Project Tasks Gantt   (J)

Zoom to mont ▾   Show Baseline

	#	ID	Task Name	Planned Start	Planned End	Planned Duration	To
⊗ 📝	0	79214	Phase 0.0 Initial Rec	04/15/2022 11:42:1	05/03/2022 11:42:1	2 Weeks 3 Days 23 Hou	8
⊗ 📝	0	79214	Phase 1.0 Feasibility	05/03/2022 11:42:18	**06/21/2022 11:42:18**	1 Month 2 Weeks 4 Day:	28
⊗ 📝	0	79214	Phase 1.1 Feasib	05/03/2022 11:42:1	05/17/2022 11:42:1	2 Weeks	8
⊗ 📝	0	79214	Phase 1.2 Planni	05/17/2022 11:42:1	06/06/2022 11:42:1	2 Weeks 6 Days	8
⊗ 📝	0	79214	Phase 1.3 Estim;	06/06/2022 11:42:1	06/21/2022 11:42:1	2 Weeks 1 Day	8
⊗ 📝	0	79214	Phase 2.0 Design	06/21/2022 11:42:18	**08/02/2022 11:42:18**	1 Month 1 Week 5 Days	24
⊗ 📝	0	79214	Phase 2.1 Schen	06/21/2022 11:42:1	07/05/2022 11:42:1	2 Weeks	8
⊗ 📝	0	79214	Phase 2.2 Desig	07/05/2022 11:42:1	07/19/2022 11:42:1	2 Weeks	8
⊗ 📝	0	79214	Phase 2.3 Contr.	07/19/2022 11:42:1	08/02/2022 11:42:1	2 Weeks	8
⊗ 📝	0	79214	Phase 3.0 Construct	08/02/2022 11:42:18	**08/30/2022 11:42:18**	4 Weeks	16
⊗ 📝	0	79214	Phase 3.1 Bid	08/02/2022 11:42:1	08/16/2022 11:42:1	2 Weeks	8
⊗ 📝	0	79214	Phase 3.2 Award	08/16/2022 11:42:1	08/30/2022 11:42:1	2 Weeks	8
⊗ 📝	0	79214	Phase 4.0 Construct	08/30/2022 11:42:18	**10/11/2022 11:42:18**	1 Month 1 Week 4 Days	24

... April May 2022 June 202 July 2022 August 20 Septembe October 2 Novembe December J;

Activate   Save   Save & Close   More   x

NOW VIEWING   CAPITAL PROJECT FORM > SCHEDULE TAB

▼ PROJECT INFORMATION

*<<Scroll down to **Project Tasks**>>*

K. Project Tasks

- **Project Tasks** provides a tabular view of project phases, highlighting phase start/end dates and percent complete information

L. Schedule Assumptions

- **Schedule Assumptions** is a free text field for the Project Manager to summarize any assumptions (e.g. deadlines, risks / delays, considerations, etc.) which may be either incorporated or impactful to the project schedule

▶ **IMPORTANT**

Capital Project: 1001785-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022

🔖 Add To Bookmarks   🖨 Print   ❓ Help

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

Activate   Save   Save & Close   More   x

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

⊞ Summary

Import From MS Project | Export To MS Project

⊞ Project Tasks Gantt

| Project Tasks | Critical Path Tasks | Task Hierarchy | Dependencies |

⊟ Project Tasks **(K)**

Refresh | Add | Find | Remove | Baseline

Apply Filters   Clear Filters   🔄 ⚙ ⭐ ⬇ ⫴

☐	#	Type	ID	Task Name	Planned Start	Planned End	Percent Complete	Actual Cost	Status
		Contains	Contains	Contains	Equals	Equals	More Than or Equal		
☐	0	Schedule Task	79214538	Phase 0.0 Initial Request	04/15/2022 11:42:18	05/03/2022 11:42:18	0 percent	$.00	Draft
☐	0	Schedule Task	79214542	Phase 1.0 Feasibility & Pre-	05/03/2022 11:42:18	06/21/2022 11:42:17	0 percent	$.00	Draft
☐	0	Schedule Task	79214544	Phase 1.1 Feasibility	05/03/2022 11:42:18	05/17/2022 11:42:18	0 percent	$.00	Draft
☐	0	Schedule Task	79214545	Phase 1.2 Planning/Pre-Des...	05/17/2022 11:42:18	06/06/2022 11:42:18	0 percent	$.00	Draft
☐	0	Schedule Task	79214547	Phase 1.3 Estimate	06/06/2022 11:42:18	06/21/2022 11:42:18	0 percent	$.00	Draft
☐	0	Schedule Task	79214548	Phase 2.0 Design	06/21/2022 11:42:18	08/02/2022 11:42:17	0 percent	$.00	Draft
								$.00	

1 - 23 of 23 items

⊟ Schedule Assumptions **(L)**

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✂ 📋 📋 📋 📋 | ↶ ↷ | 🔍 🔍 | 📝 | ☐ ☐ ☐ | ☐ ☐ ☐ | ☐ ☐ | 😊 | HTML | 🖨

Activate   Save   Save & Close   More   x

▼ PROJECT INFORMATION

On the Budget tab, you are able to view detailed project financial information, organized across several sections of the Capital Project Form

For **Capitalized** projects, financial information displayed in Facilities Connect is automatically received and refreshed via daily updates from NU Financials (system of record)

The Summary section provides a high-level project financial snapshot, including:

M. Budget group

- **Original Budget** is the original budgeted amount for the project, established during the creation of the project's capital chartstring

- **Budget Changes** represents the net change to project budget (i.e. sum of budget increases and decreases) <u>following</u> the creation of the original project budget

- **Current Budget (a+b)** is the project's current budget; it represents the sum of the Original Budget and Budget Changes line items

N. Commitments group

- **Commitments** represents the sum of all vendor purchase orders that have been created for the project

- **Invoices Paid** represents the sum of all vendor invoice payments that have been released for the project

- **Encumbrance Balance (d-e)** is the current balance of encumbrances (i.e. Commitments less Invoice Payments) for the project

▶ IMPORTANT

Capital Project: 1001252-PR002111 - Abbott 17 Renovation(Converted)

Add To Bookmarks   Print   Help

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

Budget Code Structure   812-4600000-80047077-01

BUDGET (M)

a. Original Budget	$1,800,000.00	US Dollars
b. Budget Changes	$.00	US Dollars
c. Current Budget (a+b)	$1,800,000.00	US Dollars

COMMITMENTS (N)

d. Commitments	$1,478,869.57	US Dollars
e. Invoices Paid	$1,315,849.87	US Dollars
f. Encumbrance Balance (d-e)	$163,019.70	US Dollars

INCURRED

e. Invoices Paid	$1,315,849.87	US Dollars
g. Journals/Job Cost	$105,789.69	US Dollars
h. Total Incurred (e+g)	$1,421,639.56	US Dollars

FORECAST

i. Allowance for PM Fee (%*f)	$6,520.79	US Dollars
j. Uncommitted Budget (c-f-h-i)	$208,819.95	US Dollars

Last Update   12/11/2018

Updated By

– Job Cost Billing

PM Markup   4

– Current Budget Balance

Apply Filters   Clear Filters

☐	Account	Account Description	c. Current Budget ↓	f. Encumbrance Balance	h. Total Incurred	j. Uncommitted Budget
		Contains	Contains	Equals	Equals	Equals	Equals
☐	75820	Construction Costs	$1,250,000.00	$.00	$.00	$1,250,000
☐	75899	Contingency	$120,000.00	$.00	$.00	$120,000
☐	75844	Movable Equipment-Non Capital	$100,000.00	$.00	$.00	$100,000
☐	75805	Architect and Engineer Fees & Reimbursable	$80,000.00	$.00	$.00	$80,000
☐	75841	Furniture-Capital	$80,000.00	$.00	$.00	$80,000
☐	75882	Construction Coordination Fees	$70,000.00	$.00	$.00	$70,000
☐	75853	FMO Charges	$50,000.00	$.00	$.00	$50,000

NOW VIEWING   CAPITAL PROJECT FORM > BUDGET TAB

▼ PROJECT INFORMATION

The **Summary** section provides a high-level project financial snapshot, including:

O. **Incurred** group

- **Invoices Paid** represents the sum of all vendor invoice payments that have been processed and released for the project

- **Journals / Job Cost** represents the sum of all NU Facilities internal costs (e.g. shop time, PM Fees, etc.) billed to the project

- **Total Incurred (e+g)** represents the combined total of internal and external costs that has been spent on the project

P. **Forecast** group

- **Allowance for PM Fee (%*f)** captures the project's currently unrealized, but expected project management fees, based on project Encumbrance Balance and user-entered project management fee percentage

- **Uncommitted Budget (c-f-h-i)** represents the portion of the project's Current Budget that is not committed as a current or expected project cost

▶ IMPORTANT

Capital Project: 1001252-PR002111 - Abbott 17 Renovation(Converted)

Add To Bookmarks   Print   Help

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

Budget Code Structure   812-4600000-80047077-01

BUDGET

a. Original Budget	$1,800,000.00	US Dollars
b. Budget Changes	$.00	US Dollars
c. Current Budget (a+b)	$1,800,000.00	US Dollars

COMMITMENTS

d. Commitments	$1,478,869.57	US Dollars
e. Invoices Paid	$1,315,849.87	US Dollars
f. Encumbrance Balance (d-e)	$163,019.70	US Dollars

O

INCURRED

e. Invoices Paid	$1,315,849.87	US Dollars
g. Journals/Job Cost	$105,789.69	US Dollars
h. Total Incurred (e+g)	$1,421,639.56	US Dollars

P

FORECAST

i. Allowance for PM Fee (%*f)	$6,520.79	US Dollars
j. Uncommitted Budget (c-f-h-i)	$208,819.95	US Dollars

Last Update   12/11/2018

Updated By

─ Job Cost Billing

PM Markup   4

─ Current Budget Balance

Apply Filters   Clear Filters

☐	Account	Account Description	c. Current Budget ↓	f. Encumbrance Balance	h. Total Incurred	j. Uncommitted Budget
		Contains	Contains	Equals	Equals	Equals	Equals
☐	75820	Construction Costs	$1,250,000.00	$.00	$.00	$1,250,000
☐	75899	Contingency	$120,000.00	$.00	$.00	$120,000
☐	75844	Movable Equipment-Non Capital	$100,000.00	$.00	$.00	$100,000
☐	75805	Architect and Engineer Fees & Reimbursable	$80,000.00	$.00	$.00	$80,000
☐	75841	Furniture-Capital	$80,000.00	$.00	$.00	$80,000
☐	75882	Construction Coordination Fees	$70,000.00	$.00	$.00	$70,000
☐	75853	FMO Charges	$50,000.00	$.00	$.00	$50,000

NOW VIEWING CAPITAL PROJECT FORM > BUDGET TAB

▼ PROJECT INFORMATION

The **Job Cost Billing** section allows applicable users to enter the project management fee (PM Fee) for the project

Q. PM Markup is the PM Fee for the project, entered as a percentage

Note: When entering the PM Fee percentage, <u>do not</u> include a percent sign in your entry.

Here are some examples of how to enter the PM Fee:

- Enter "**4**" for a 4% PM Fee
- Enter "**3.5**" for a 3.5% PM Fee

▶ IMPORTANT

Capital Project: 1001252-PR002111 - Abbott 17 Renovation(Converted)

🔖 Add To Bookmarks 🖨 Print ❓ Help

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

Budget Code Structure   812-4600000-80047077-01   🔍 ⊗

BUDGET		
a. Original Budget	$1,800,000.00	US Dollars
b. Budget Changes	$.00	US Dollars
c. Current Budget (a+b)	$1,800,000.00	US Dollars

COMMITMENTS		
d. Commitments	$1,478,869.57	US Dollars
e. Invoices Paid	$1,315,849.87	US Dollars
f. Encumbrance Balance (d-e)	$163,019.70	US Dollars

INCURRED		
e. Invoices Paid	$1,315,849.87	US Dollars
g. Journals/Job Cost	$105,789.69	US Dollars
h. Total Incurred (e+g)	$1,421,639.56	US Dollars

FORECAST		
i. Allowance for PM Fee (%*f)	$6,520.79	US Dollars
j. Uncommitted Budget (c-f-h-i)	$208,819.95	US Dollars

Last Update   12/11/2018   📅 ⊗

Updated By   🔍 ⊗

⊟ Job Cost Billing

PM Markup   4   **Q**

⊟ Current Budget Balance

Apply Filters   Clear Filters   🔄 ⭐ ⬇ ▥

☐	Account	Account Description	c. Current Budget ↓	f. Encumbrance Balance	h. Total Incurred	j. Uncommitted Budget
	Contains	Contains	Equals	Equals	Equals	Equals
☐	75820	Construction Costs	$1,250,000.00	$.00	$.00	$1,250,000
☐	75899	Contingency	$120,000.00	$.00	$.00	$120,000
☐	75844	Movable Equipment-Non Capital	$100,000.00	$.00	$.00	$100,000
☐	75805	Architect and Engineer Fees & Reimbursable	$80,000.00	$.00	$.00	$80,000
☐	75841	Furniture-Capital	$80,000.00	$.00	$.00	$80,000
☐	75882	Construction Coordination Fees	$70,000.00	$.00	$.00	$70,000
☐	75853	FMO Charges	$50,000.00	$.00	$.00	$50,000

NOW VIEWING ▸ CAPITAL PROJECT FORM > BUDGET TAB

▼ PROJECT INFORMATION

<<Scroll down to the Current Budget Balance section>>

The **Current Budget Balance** section provides project budget and cost information at the account code level

R. **Current Budget Balance** is a sortable and filterable table containing budget and cost details for each project account code

Note: You may click on any account code line item in the table to view additional details

The **Cost Overview** section provides a space to capture any notes or assumptions regarding project financial information

S. **Cost Overview** is a free text field, allowing the Project Manager to record any notes or assumptions regarding project financial information

▶ IMPORTANT

Capital Project: 1001785-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022   Add To Bookmarks   Print   H

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

Activate   Calculate   Save   Save & Close   More   x

⊟ Current Budget Balance   (R)

Apply Filters   Clear Filters

☐	Account	Account Description	c. Current Budget ↓	f. Encumbrance Balance	h. Total Incurred	j. Uncommitted Budget
	Contains	Contains	Equals	Equals	Equals	Equals
☐	75820	Construction Costs	$1,250,000.00	$.00	$.00	$1,250
☐	75899	Contingency	$120,000.00	$.00	$.00	$120
☐	75844	Movable Equipment-Non Capital	$100,000.00	$.00	$.00	$100
☐	75805	Architect and Engineer Fees & Reimbursable	$80,000.00	$.00	$.00	$80
☐	75841	Furniture-Capital	$80,000.00	$.00	$.00	$80
☐	75882	Construction Coordination Fees	$70,000.00	$.00	$.00	$70
			$1,793,000.00	$.00	$.00	$1,793

1 - 82 of 82 items

⊟ Cost Overview

| Font Family | Font Size | Paragraph | A ▾ | ab ▾ | B | I | U | ABC | x₂ | x² | ☰ | ☰ | ☰ | ☰ | ☰ | ☰ |

(S)

⊟ Project Budget   Add

Apply Filters   Clear Filters

☐	!	ID	Type	Date	Name	Amount
☐		1001406	Project Original Budget	04/15/2022	812-1370000-80041586-02	$1,79

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

Activate   Calculate   Save   Save & Close   More ⌃   x

NOW VIEWING | CAPITAL PROJECT FORM > BUDGET TAB

PROJECT INFORMATION

The Project Budget section provides a record of project budget updates; this includes the creation of the original project budget as well as budget changes

T. **Project Budget** is a log of project budget updates, including the date of each update

Note: You may click on any line item in this section to view additional details, including amounts by project account code

Important: For Capital projects, do not use the Add button in this section. All updates to Project Budget are automatically received and refreshed via daily updates from NU Financials

▶ **IMPORTANT**

Capital Project: 1001785-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022

Add To Bookmarks   Print

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

Activate   Calculate   Save   Save & Close   More   x

Current Budget Balance

Apply Filters   Clear Filters

	Account	Account Description	c. Current Budget ↓	f. Encumbrance Balance	h. Total Incurred	j. Uncommitted Budget
	Contains	Contains	Equals	Equals	Equals	Equals
☐	75820	Construction Costs	$1,250,000.00	$.00	$.00	$1,250
☐	75899	Contingency	$120,000.00	$.00	$.00	$120
☐	75844	Movable Equipment-Non Capital	$100,000.00	$.00	$.00	$100
☐	75805	Architect and Engineer Fees & Reimbursable	$80,000.00	$.00	$.00	$80
☐	75841	Furniture-Capital	$80,000.00	$.00	$.00	$80
☐	75882	Construction Coordination Fees	$70,000.00	$.00	$.00	$70
			$1,793,000.00	$.00	$.00	$1,793

1 - 82 of 82 items

Cost Overview

| Font Family | Font Size | Paragraph | A | B I U ABC | | | | | | | | |

(T)

Project Budget

Add

Apply Filters   Clear Filters

	!	ID	Type	Date	Name	Amount
☐		1001406	Project Original Budget	04/15/2022	812-1370000-80041586-02	$1,79

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

Activate   Calculate   Save   Save & Close   More   x

NOW VIEWING CAPITAL PROJECT FORM > PROCUREMENT TAB

▼ PROJECT INFORMATION

On the **Procurement** tab, you are able to view project purchase order, invoice, and payment release information, organized in two (2) sections of the **Capital Project Form**

Note: On this tab, always be aware of the number of items present within each section (shown on the **Information Bar**)

As a default, Facilities Connect will display the first ten (10) items in each section. This can be adjusted by changing the number of visible records via the **Show** dropdown on the right side of each section

Capital Project: 1001252-PR002111 - Abbott 17 Renovation(Converted)

Add To Bookmarks   Print

General   Scope   Schedule   Budg   **Procurement**   ontacts   Notes & Documents

Complete   Revise

Contracts and Purchase Orders

Apply Filters   Clear Filters

!	Vendor Company Name	ID	Type	Date	PO Amount	Total Invoice
	Contains	Contains	Contains	More Than or Equals	Equals	Equals
	HENRICKSEN & CO	PUR1316173	Purchase Order	11/28/2018	$61,249.26	$6
	FASTSIGNS-CHICAGO	PUR1365612	Purchase Order	11/28/2018	$1,994.33	$
	CELTIC ENVIRONMENTAL COMPANY	PUR1326742	Purchase Order	11/28/2018	$3,300.00	$
	AVI SYSTEMS	PUR1351161	Purchase Order	11/28/2018	$1,100.56	$
	CARNOW CONIBEAR & ASSOC	PUR1237461	Purchase Order	11/28/2018	$2,100.00	$
	CEPRO, INC	PUR1297633	Purchase Order	11/28/2018	$1,250.00	$
	EHC INDUSTRIES, INC	PUR1294664	Purchase Order	11/28/2018	$23,880.00	$2
	HENRICKSEN	PUR1377777	Purchase Order	11/28/2018	$11,887.09	$1
	ABT ELECTRONICS & APPLIANCE CO	PUR1368320	Purchase Order	11/01/2018	$1,189.00	$
	FASTSIGNS-CHICAGO	PUR1337259	Purchase Order	08/17/2018	$1,994.33	

Items per page: 10   ▾ | 1 - 10 of 14 items | 1   of 2 pages   ◄   ►

⊞ **Billing - Payment Release**

⊞ **Billing - PO Invoices**

⊞ **Billing - Journal Invoices**

⊞ **Billing - Work Task Costs**

⊞ **Job Cost Billing**

⊞ **Job Cost Detail**

Complete   Revise   x

► IMPORTANT

NOW VIEWING | CAPITAL PROJECT FORM > PROCUREMENT TAB

▼ PROJECT INFORMATION

The Contract and Purchase Orders section provides a list of project purchase orders, organized by vendor name and purchase order ID number

U. **Contracts and Purchase Orders** is a sortable and filterable table containing budget and cost details for each project account code

- **Vendor Company Name** – name of the vendor as indicated on the new purchase order form

- **ID** - purchase order ID number

- **Type -** indicates the record type of the individual line item

- **Date** – date of purchase order creation (or last update to PO amount)

- **PO Amount** – total amount of the purchase order (includes initial amount and any changes)

- **Total Invoice** – total of NU invoice payments applied to the purchase order

    Note: You may click on any purchase order line item in the table to view additional details

▶ IMPORTANT

Capital Project: 1001252-PR002111 - Abbott 17 Renovation(Converted)

Add To Bookmarks | Print

General   Scope   Schedule   Budg...   **Procurement**   ...ontacts   Notes & Documents

Complete | Revise

U

□ Contracts and Purchase Orders

Apply Filters   Clear Filters

!	Vendor Company Name	ID	Type	Date	PO Amount	Total Invoice
	Contains	Contains	Contains	More Than or Equals	Equals	Equals
	HENRICKSEN & CO	PUR1316173	Purchase Order	11/28/2018	$61,249.26	$6
	FASTSIGNS-CHICAGO	PUR1365612	Purchase Order	11/28/2018	$1,994.33	$
	CELTIC ENVIRONMENTAL COMPANY	PUR1326742	Purchase Order	11/28/2018	$3,300.00	$
	AVI SYSTEMS	PUR1351161	Purchase Order	11/28/2018	$1,100.56	$
	CARNOW CONIBEAR & ASSOC	PUR1237461	Purchase Order	11/28/2018	$2,100.00	$

Items per page: 10   1 - 10 of 14 items   1 of 2 pages

□ Billing - Payment Release

Apply Filters   Clear Filters

Check Date	Vendor	Purchase Order	Invoice Number	Check Number	Check Amount
After	Contains	Contains	Contains	Contains	Equals
06/07/2019	HENRICKSEN	PUR1377777	671910	7241466	$8,937.3
04/30/2019	NORCON INCORPORATED	PUR1317498	2018072-007	7237074	$62,701.5
04/11/2019	GRISKELIS YOUNG HARRELL	PUR1203708	1904.001	7234837	$2,120.2
04/10/2019	NORCON INCORPORATED	PUR1317498	2018072-009	7234715	$71,241.4
03/25/2019	REEBIE STORAGE & MOVING COMPANY	PUR1298666	NU014902	7232964	$1,175.2

Items per page: 10   1 - 10 of 46 items   1 of 5 pages

⊞ Job Cost Detail

Complete | Revise | x

NOW VIEWING CAPITAL PROJECT FORM > PROCUREMENT TAB

▼ PROJECT INFORMATION

The **Billing** section provides a list of project invoices and payment release information

V. **Billing** is a sortable and filterable table containing invoice (PO and journal) and payment information

- **ID** – ID number for the invoice or payment release

- **Type -** indicates the record type of the individual line item

  • **PO Invoice** – represents an invoice of charges corresponding to a vendor PO

  • **Journal Invoice** – represents an invoice of charges which is internal in nature (e.g. NU Facilities shop time, PM Fees, etc.)

  • **Payment Release** – a record indicating that a payment has been released for a corresponding PO or Journal invoice

- **Date** – date of the invoice or payment release

- **Name** – the system-created name for the invoice or payment release record

- **Status** – indicates the status of the invoice or payment release

Note: You may click on any invoice or payment release line item in the table to view additional details

▶ IMPORTANT

Capital Project: 1001252-PR002111 - Abbott 17 Renovation(Converted)   Add To Bookmarks   Print

General   Scope   Schedule   Budg   **Procurement**   ontacts   Notes & Documents   Complete   Revise

☐ Contracts and Purchase Orders

Apply Filters   Clear Filters   ↻   ☆   ⤓

!	Vendor Company Name	ID	Type	Date	PO Amount	Total Invoice
	Contains	Contains	Contains	More Than or Equals	Equals	Equals
	HENRICKSEN & CO	PUR1316173	Purchase Order	11/28/2018	$61,249.26	$6
	FASTSIGNS-CHICAGO	PUR1365612	Purchase Order	11/28/2018	$1,994.33	$
	CELTIC ENVIRONMENTAL COMPANY	PUR1326742	Purchase Order	11/28/2018	$3,300.00	$
	AVI SYSTEMS	PUR1351161	Purchase Order	11/28/2018	$1,100.56	$
	CARNOW CONIBEAR & ASSOC	PUR1237461	Purchase Order	11/28/2018	$2,100.00	$

Items per page: 10 ▼   1 - 10 of 14 items   1 of 2 pages ◄ ►

☐ Billing - Payment Release

Apply Filters   Clear Filters   ↻   ☆   ⤓

Check Date	Vendor	Purchase Order	Invoice Number	Check Number	Check Amount
After	Contains	Contains	Contains	Contains	Equals
06/07/2019	HENRICKSEN	PUR1377777	671910	7241466	$8,937.3
04/30/2019	NORCON INCORPORATED	PUR1317498	2018072-007	7237074	$62,701.5
04/11/2019	GRISKELIS YOUNG HARRELL	PUR1203708	1904.001	7234837	$2,120.2
04/10/2019	NORCON INCORPORATED	PUR1317498	2018072-009	7234715	$71,241.4
03/25/2019	REEBIE STORAGE & MOVING COMPANY	PUR1298666	NU014902	7232964	$1,175.2

Items per page: 10 ▼   1 - 10 of 46 items   1 of 5 pages ◄ ►

⊞ Job Cost Detail

Complete   Revise   x

NOW VIEWING | CAPITAL PROJECT FORM > CONTACTS TAB

▼ PROJECT INFORMATION

The **Contacts** tab organizes internal and external project contacts, including project roles and contact information

W. Contacts

- **Contacts** is a listing of internal and external project contacts, maintained by the Project Manager, and includes each individual's project role and contact information

X. Contacts Description

- **Contacts Description** is a free text field for the Project Manager to summarize any important information or notations regarding project contacts

▶ IMPORTANT

Capital Project: 1001785-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022

Add To Bookmarks   Print

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

Activate   Calculate   Save   Save & Close   More

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

Contacts (W)

Add Person | Remove

Apply Filters   Clear Filters

	!	Role	Person	Work Phone	Fax	Email	Primary Organization
		Contains	Contains	Contains	Contains	Contains	Contains
☐		Project Director	Stone,David B	847/467-6160			Facilities Capital Programs
☐		Project Primary Manager	Wright,Teri	847/491-5271			Facilities Capital Programs
☐		Vendor	Vannatta,Tom	312-441-9610			E CUBE INC

Items per page: 10   1 - 3 of 3 items   1 of 1 pages

Contacts Description (X)

| Font Family | Font Size | Paragraph | A | B I U ABC | | | |

For some roles, you can assign only one contact. (W)

* Role	* Name	Organization	Work phone	Fax	Email
Project Director	Stone,David B ✕	Facilities Capital Programs	847/467-6160		⊖
Project Primary Manager	Wright,Teri ✕	Facilities Capital Programs	847/491-5271		⊖
Vendor	Vannatta,Tom ✕	E CUBE INC	312-441-9610		⊖

New row ⊕

Activate   Calculate   Save   Save & Close   More   x

NOW VIEWING | CAPITAL PROJECT FORM > NOTES & DOCUMENTS TAB

▼ PROJECT INFORMATION

The **Notes & Documents** tab is a centralized repository for important project notes and documentation

Y. Comments

- **Comments** is a rolling list of date-stamped notations, editable by all user roles able to access the project. Use of the field is at the user's discretion, but it can be used for memorialization of important project events such as milestones, key decisions, project risks, etc.

Z. Related Documents

- **Related Documents** is a file repository for the storage of important project documentation and / or media files (e.g. contracts, drawings, designs, photos). This section includes an upload utility (via the 'Upload' button) for searching and selecting files for upload.

▶ IMPORTANT

Capital Project: 1001785-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022

Add To Bookmarks   Print   Help

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

Activate   Calculate   Save   Save & Close   More   x

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

Comments   (Y)   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   (Z)   Find | Remove | Upload

Apply Filters   Clear Filters

☐	!	Document Name	Document Description
		No data to display	

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

Progress Reports   Find | Remove

Apply Filters   Clear Filters

☐	!	ID	Date	Title	Status
			No data to display		

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

Activate   Calculate   Save   Save & Close   More   x