



Course 2

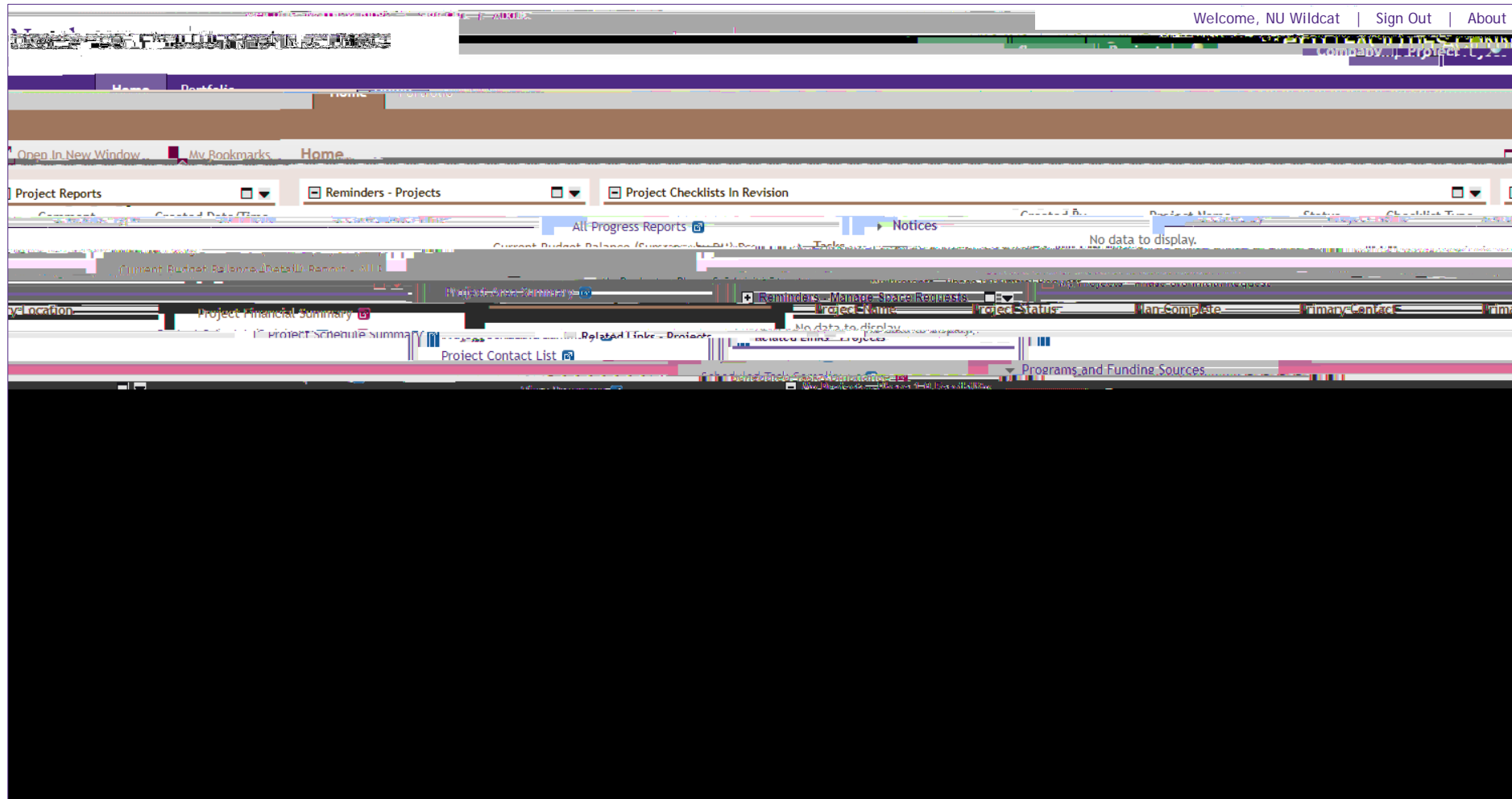
# Introduction to Facilities Connect and Creating a Project





# Section 1 | **System Orientation and Navigation**

# FACILITIES CONNECT HOME SCREEN

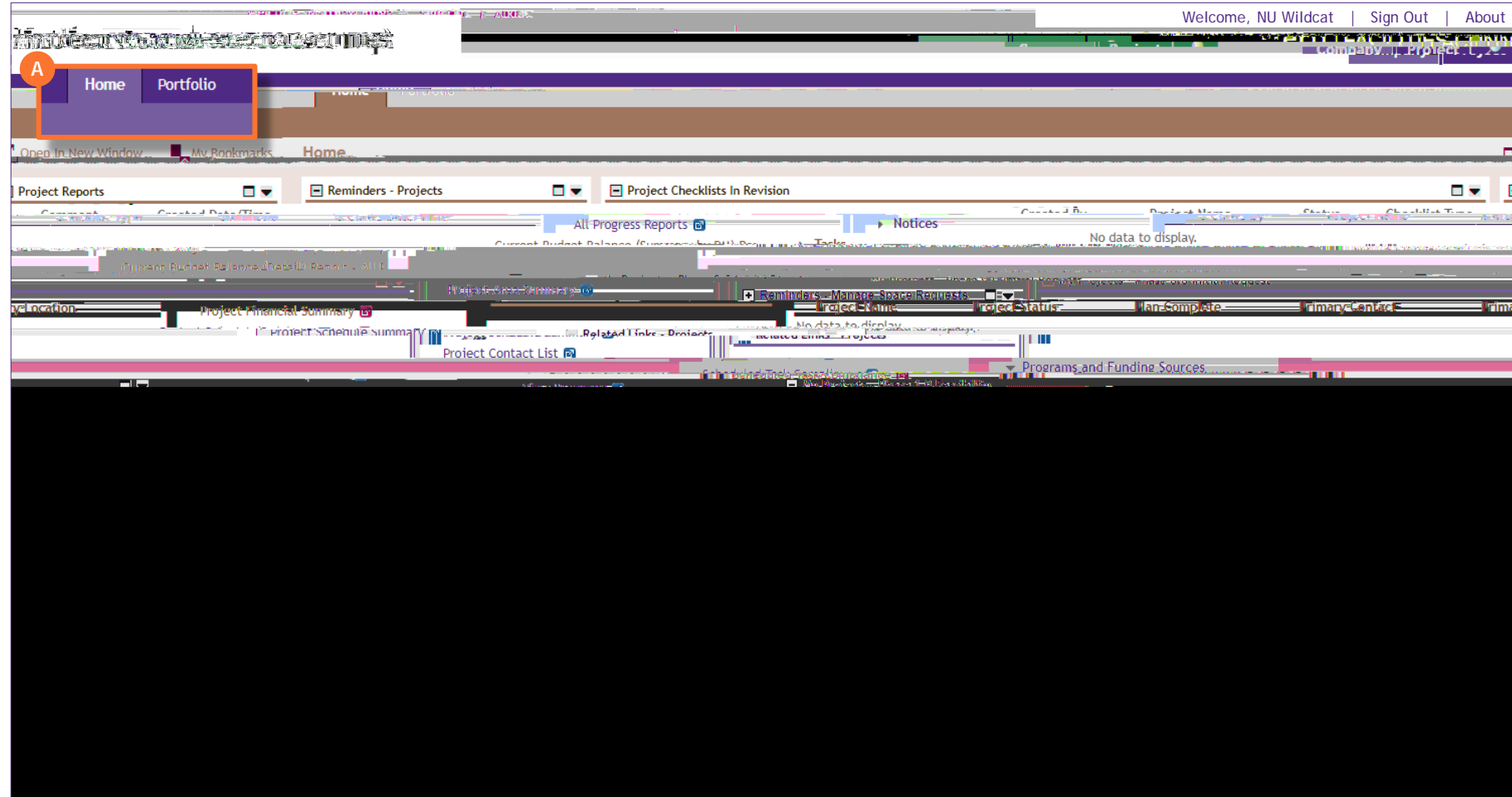


## FACILITIES CONNECT HOME SCREEN

### GETTING STARTED

#### A. Portal Tabs

- [Home Tab](#)
- [Portfolio Tab](#)

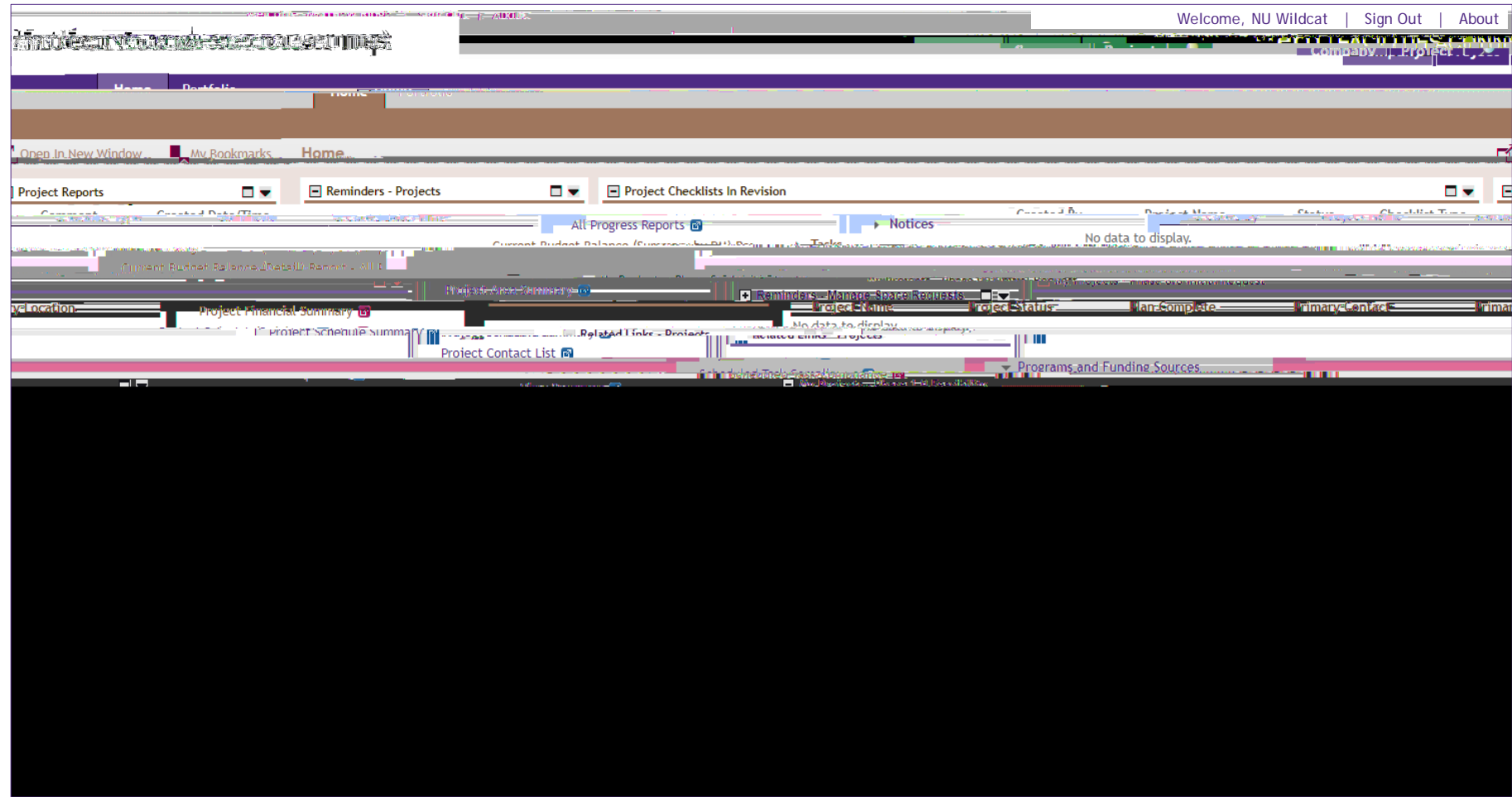






# FACILITIES CONNECT HOME SCREEN

- Related Links - Projects portlet
  - Create a Capital Project

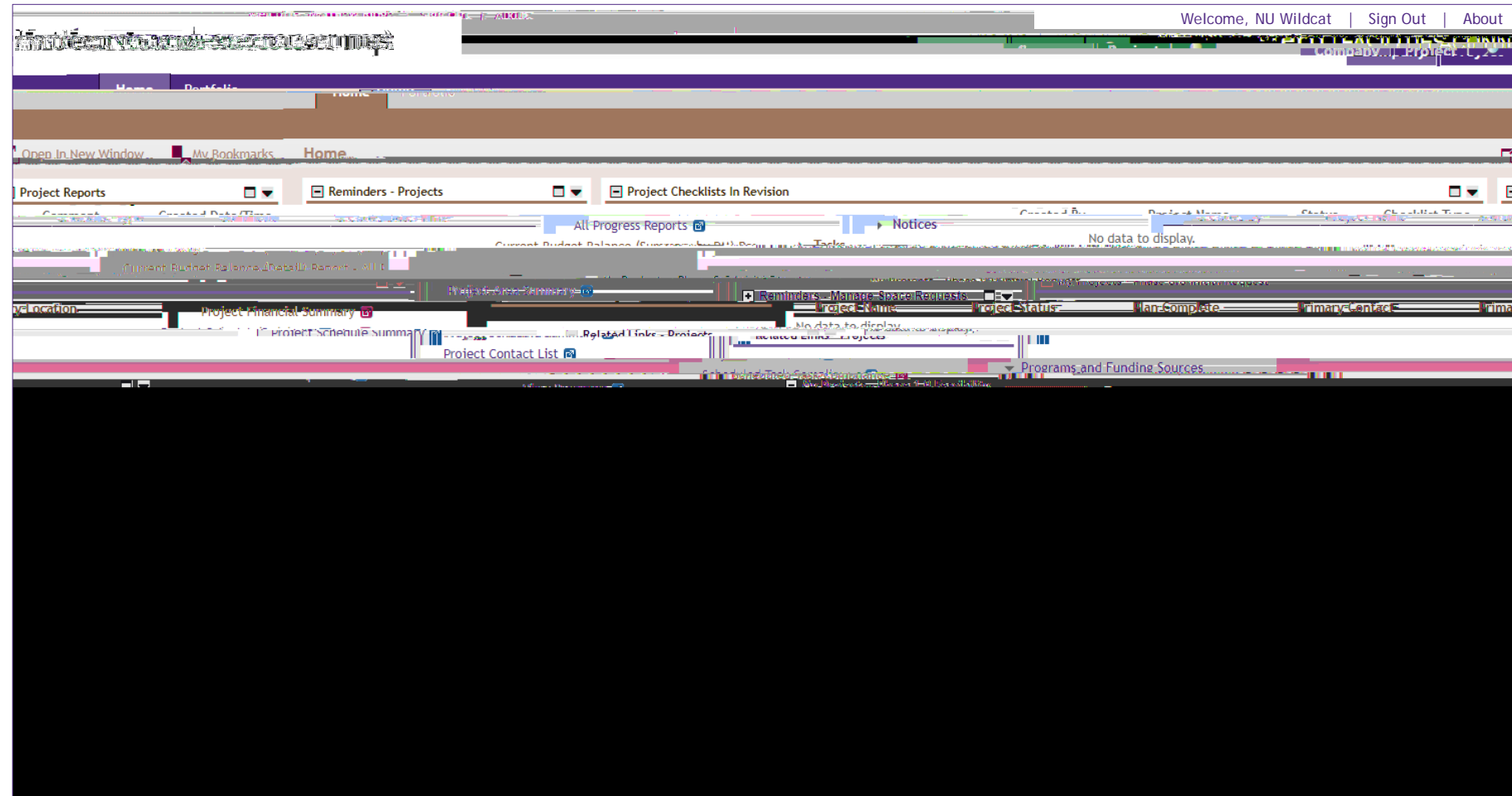




## FACILITIES CONNECT HOME SCREEN

### 'My Projects' portlets

- [Project Checklists in Revision](#)
- [Phase 0.0 – Initial Request](#)
- [Phase 1.0 – Feasibility](#)
- [Phase 2.0 – Design](#)
- [Phase 3.0 – Construction Procurement](#)
- [Phase 4.0 – Construction](#)
- [Phase 5.0 – Operational](#)







# FACILITIES CONNECT HOME SCREEN

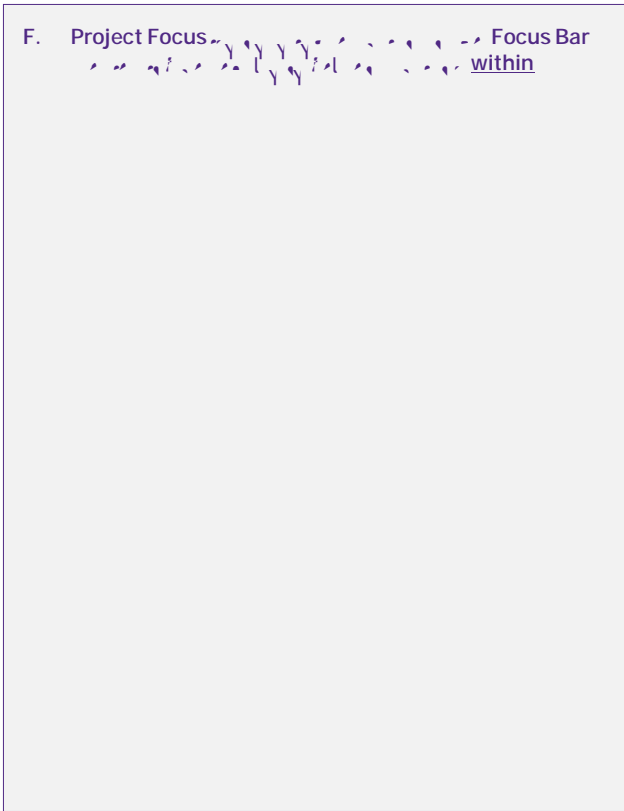
Project Reports portlet

The screenshot shows a web application interface with a top navigation bar containing 'Welcome, NU Wildcat', 'Sign Out', and 'About'. Below this is a main content area with several portlets. The 'Project Reports' portlet is highlighted with a red box. Other visible portlets include 'Reminders - Projects', 'Project Checklists In Revision', 'All Progress Reports', 'Notices', 'Current Budget Balance', 'Project Financial Summary', 'Project Schedule Summary', 'Project Contact List', 'Related Links - Donations', 'Reminders - Manage Special Requests', 'Project Status', 'Programs and Funding Sources', and 'No data to display'. The interface uses a color scheme of purple, brown, and white.



# FACILITIES CONNECT HOME SCREEN

F. Project Focus Focus Bar  
within



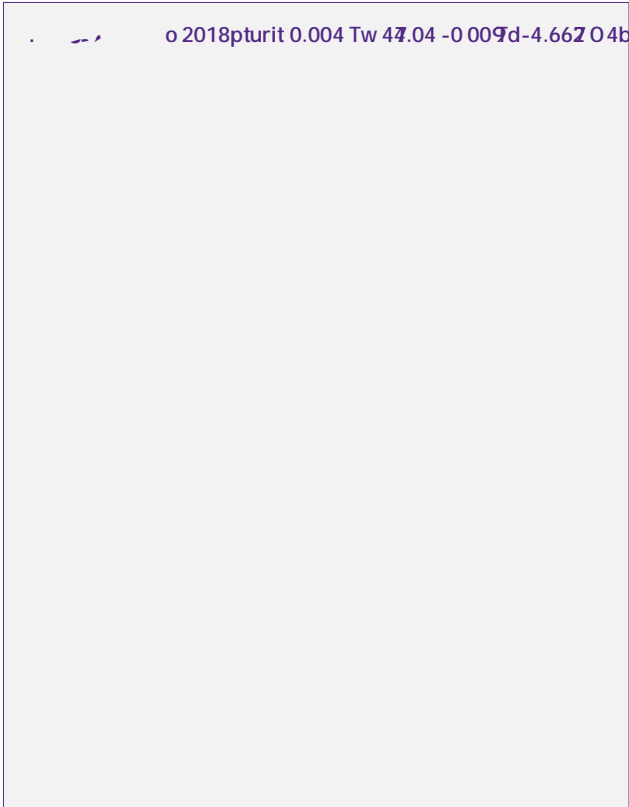
Facilities Connect Home Screen





# FACILITIES CONNECT HOME SCREEN

Facilities Connect Home Screen



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FACILITIES CONNECT HOME SCREEN

**GETTING STARTED**

- Organizations portlet
- People portlet
- External Contact
  - External Company

The screenshot shows the 'Facilities Connect' home screen. At the top, there is a navigation bar with 'Company' and 'Project' tabs. Below this is a header area with 'Welcome, NU Wildcat | Sign Out | About'. The main content area features several portlets. Two callouts are present: 'K' points to the 'Organizations' portlet, which lists 'Departments', 'External Companies', and 'Workgroups'; 'L' points to the 'People' portlet, which lists 'Employees', 'Consultants', and 'External Contacts'. Other visible portlets include 'Geography', 'Assets', 'Core', and 'Keys'.





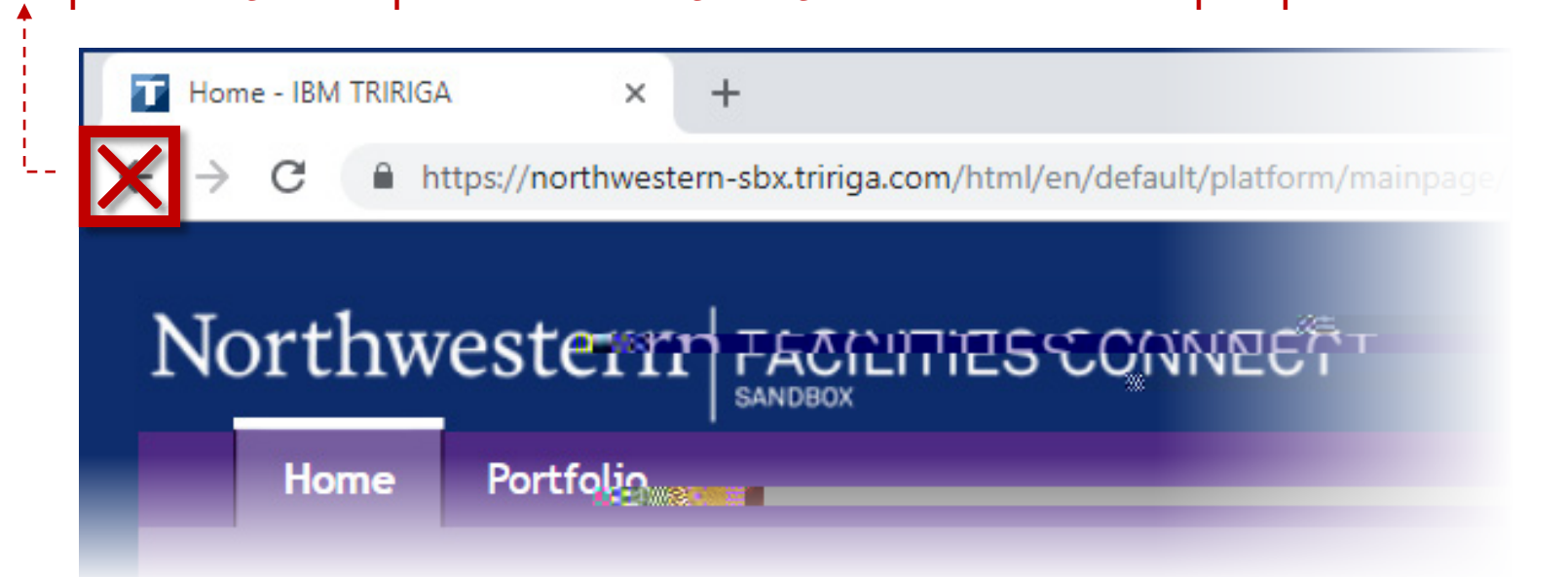
## FACILITIES CONNECT - USEFUL TIPS

### GETTING STARTED

- [Back.](#)
- [Back.](#)

**⚠ Do Not** [Back.](#) **Try**

[Try](#)







## GETTING STARTED

- ▶ You can save your work in a file.
- ▶ You can save your work in a file.
- ▶ Save
- ▶ Save & Close.
- ▶ You can save your work in a file.
- ▶ You can save your work in a file.

! Save Save & Close.







GETTING STARTED

➤ Project Record Status

**!** By default, Project Record Status is set to "Not Started".





# Creating a New Project

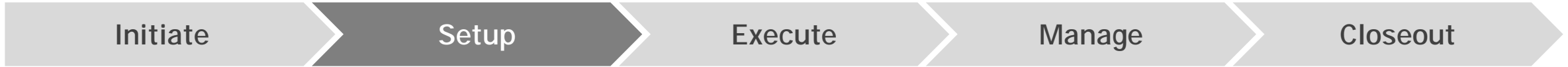
γ . " " ?

Step	Where	Requirement
<p>Handwritten notes in the Step column:</p> <ul style="list-style-type: none"> <li>• Add NU Facilities Pro</li> <li>• Add NU Facilities Pro</li> <li>• Add NU Facilities Pro</li> <li>• Add NU Facilities Pro</li> </ul>		<p>Handwritten notes in the Requirement column:</p> <p>A γ .</p>
<p>Create Project</p> <ul style="list-style-type: none"> <li>• Add NU Facilities Pro</li> <li>• Add NU Facilities Pro</li> <li>• Add NU Facilities Pro</li> <li>• Add NU Facilities Pro</li> </ul>		
<p>Add NU Facilities Pro</p>		



# Creating a New Project

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Step	Where	Requirement	Frequency
Add Primary Customer Contact	FACILITIES CONNECT	Handwritten notes	Handwritten notes
Add Supplemental Project Information <ul style="list-style-type: none"> <li>Handwritten bullet points</li> </ul>	FACILITIES CONNECT	A γ	Handwritten notes
Add Project Scope <ul style="list-style-type: none"> <li>Handwritten bullet points</li> </ul>	FACILITIES CONNECT	A γ	Handwritten notes

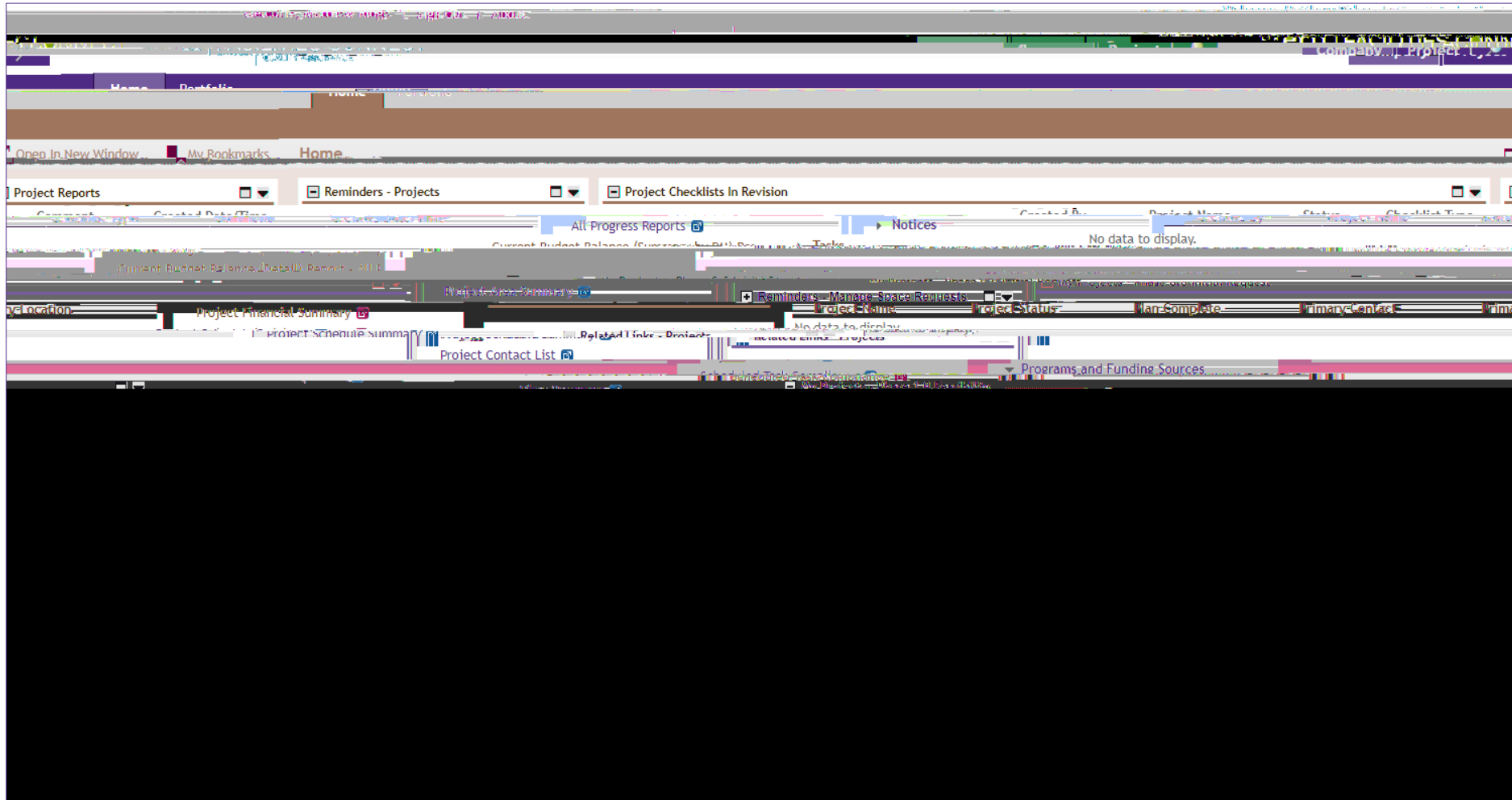






# Step 1

## Create a New Capital Project







Step 2

# A. Project Name, Date Information

The screenshot shows a web browser window with the following elements:

- Top right navigation: Welcome, NU Wildcat | Sign Out | About
- Page title: Northwestern FACILITIES CONNECT
- Form fields:
  - \* Date: 11/24/2018 (with a calendar icon)
  - \* Name: (empty text input field)

An orange arrow points to the form area from the left.



## Step 2

# Project Name, Date Information

IMPORTANT  
CONCEPT

## Naming a Project

The name of project in Facilities Connect must adhere to the following convention:

Building / Area  
Name

+

Sub-Location

+

Description

+

Effort

+

Year



## EXAMPLE

### Naming a Project

The name of project in Facilities Connect must adhere to the following convention:

Abbott Hall

Second Floor

MFA Teaching Studio

Buildout

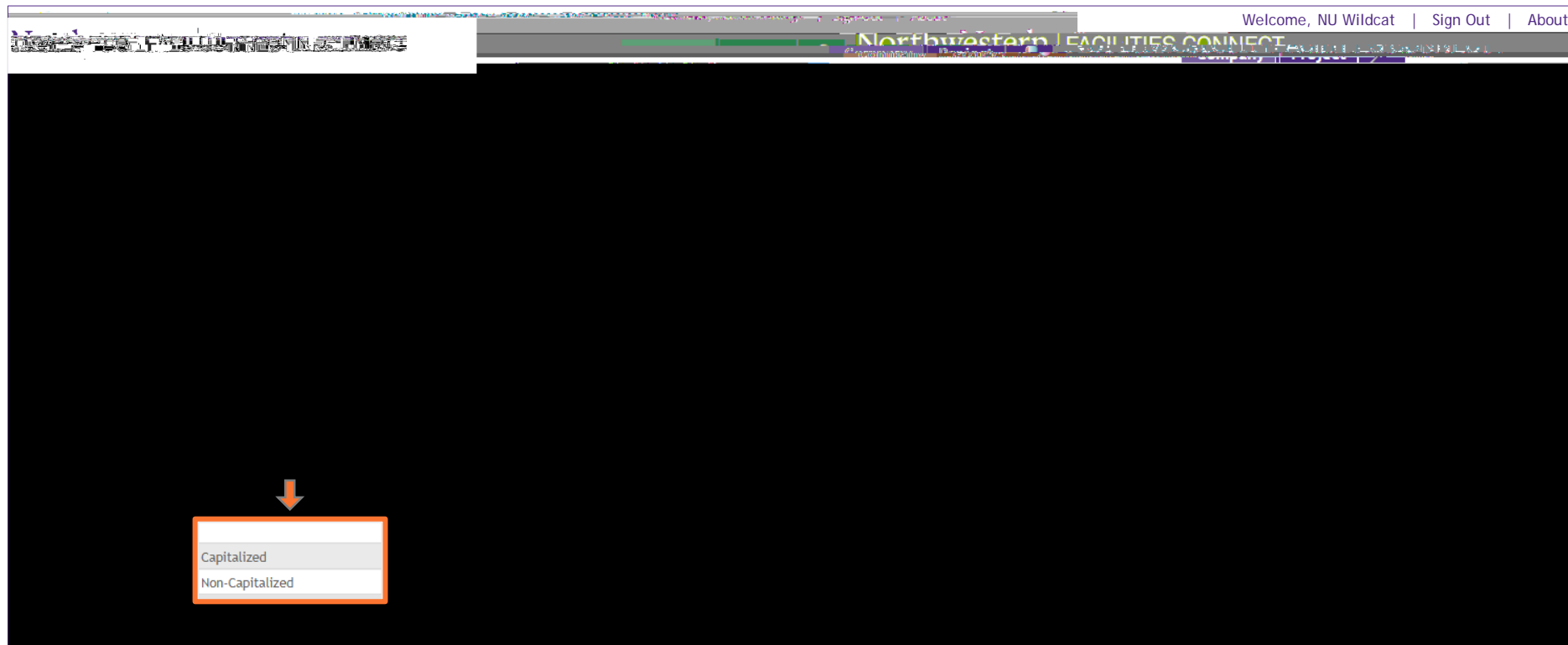






## Step 3

## Project Category





Step 4

# A Chartstring ( )



Step 5

A Primary Location







Project Company

Home Portfolio

Create Draft x General Scope Schedule Budget Procurement Contacts Notes & Documents

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

ID	Date	Project Name	Project Reporting Name	Project Classification	Project Phase	Project Type
1	11/25/2018	Wafa Bank Building Renovation and Clearing of the Old Building	Abbott Hall Second Floor MFA Teaching Studio Buildout 2018	New Construction	0.0 Initial Request	

Project Website: about:blank

Project Category: Initialized

Project Status:  Primary Location



# Step

# A



Welcome, NU Wildcat | Sign Out | About

Project ID: [Field] Date: 11/25/2018

Project Reporting Name: Abbott Hall Second Floor MFA Teaching Studio Buildout 2018

Project Classification: New Construction Project Phase: 0.0 Initial Request Project Type: [Field]

Project Website: about:blank

Primary Location: [Field]







# Step 6

## A Project Primary Manager

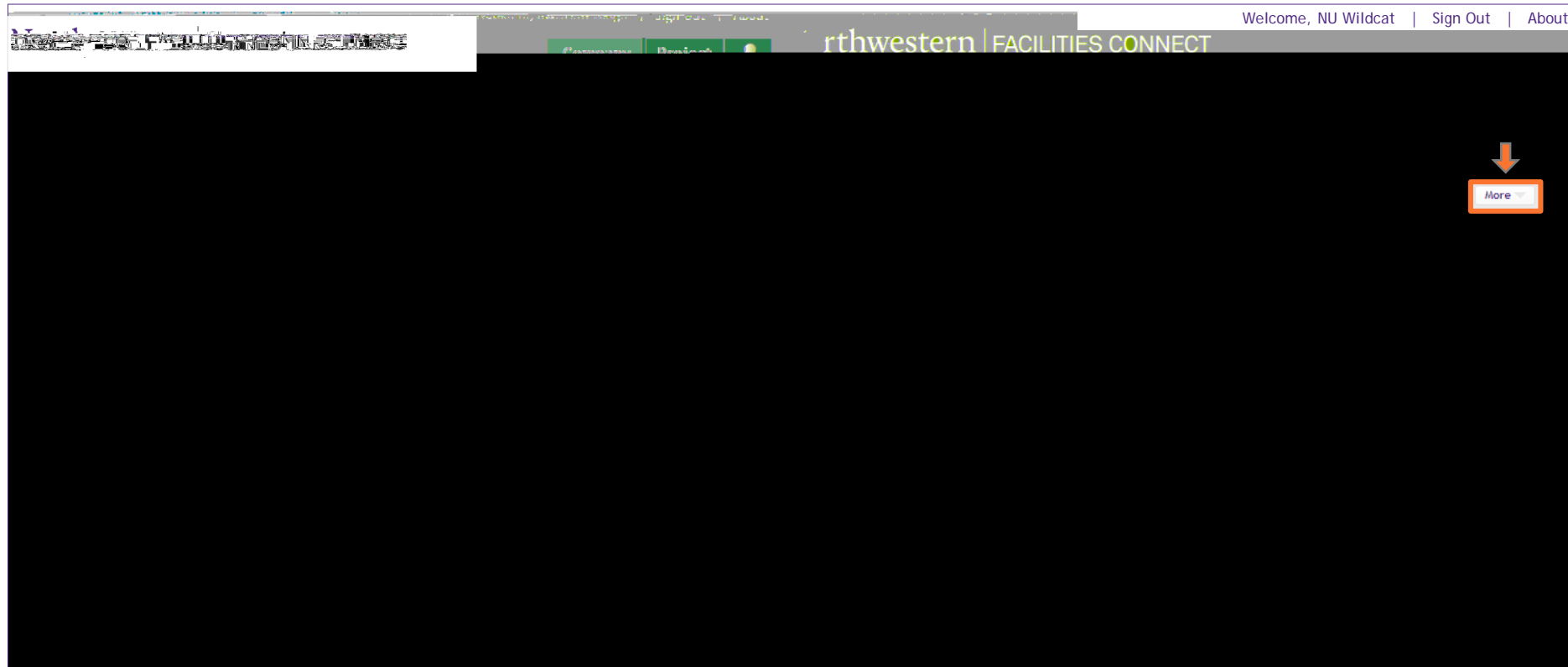






Step 9

# Assign Project Template

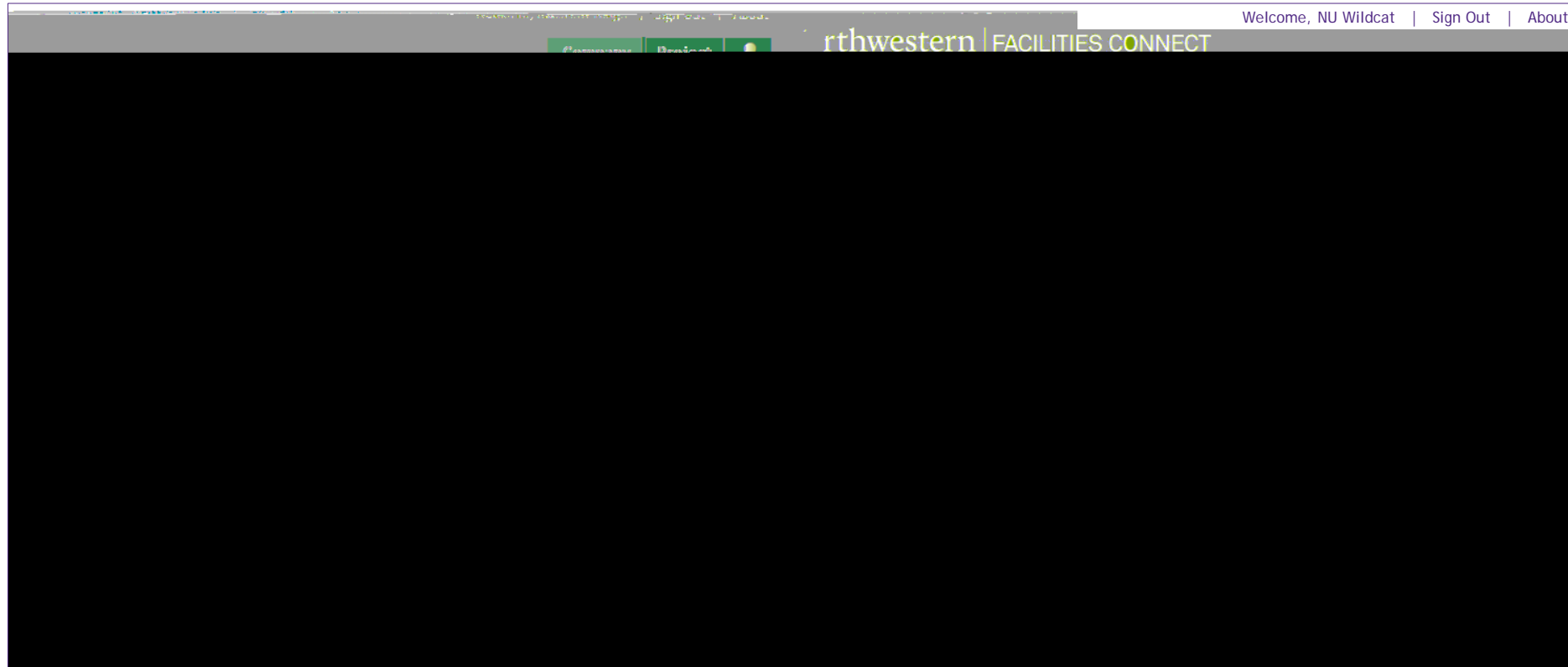


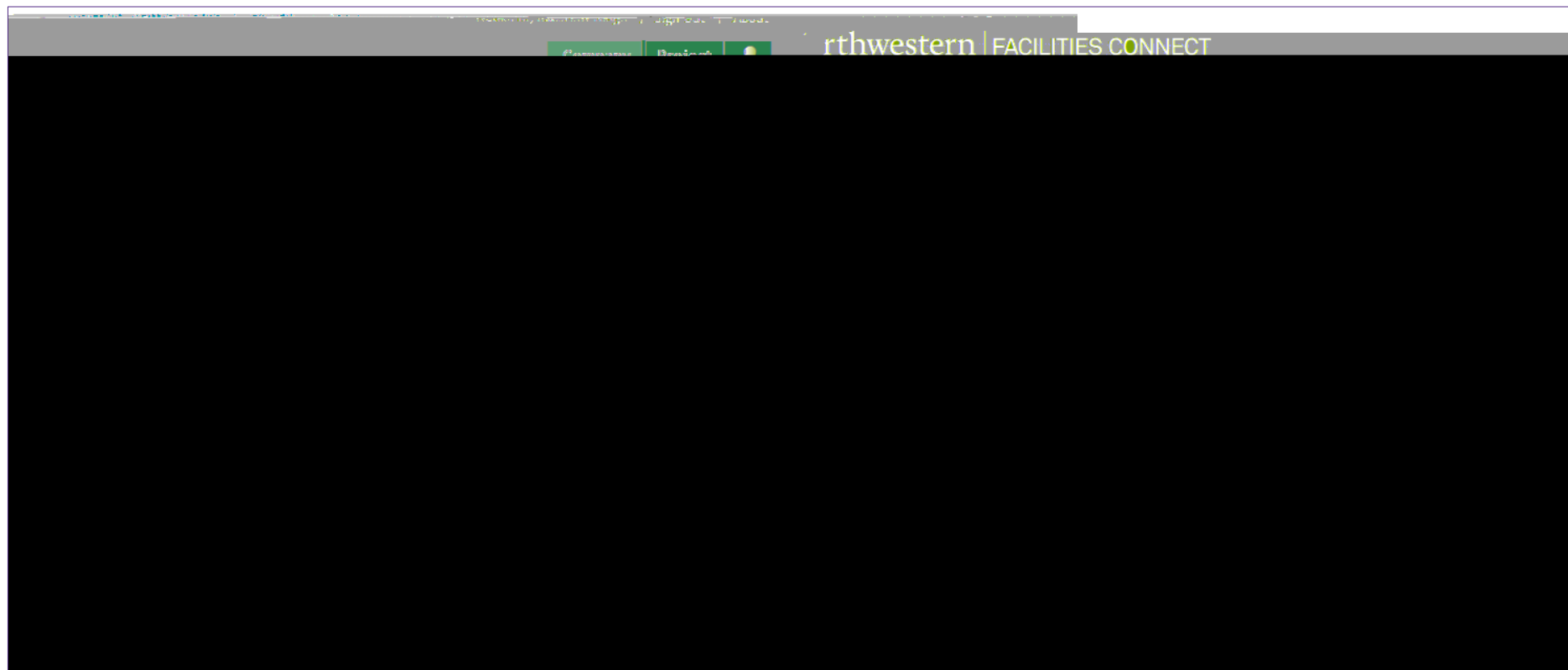




Step

# A. Project Template







# Create a New Project

.....

Creating a New Project, ...

Creating a New Project, ...

<https://northwestern-qa.tririga.com>

...



# Conclusion

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Thank you for your participation!

Course 3: Updating and Managing Projects in Facilities Connect





# Conclusion

Timeline of activities

WK	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
1	3	4	5 Intro to Facilities Connect and Creating a Project 10-11:30   (L 2020, - 1st) Open Lab 2-4,   (L 2020, - 1st)	6 Open Lab 9-1   (L 2020, - 1st) Intro to Facilities Connect and Creating a Project 2-3:30,   (L 2020, - 1st)	7 Open Lab 2-4,   (L 2020, - 1st)
2	10 Open Lab 9-1   (L 2020, - 1st)	11 Open Lab 2-4,   (L 2020, - 1st)	12 Open Lab 9-1   (L 2020, - 1st)	13 Open Lab 9-1   (L 2020, - 1st)	14 Open Lab 2-4,   (L 2020, - 1st)
3	17 Open Lab 2-4,   (L 2020, - 1st)	18 Open Lab 2-4,   (L 2020, - 1st)	19 Open Lab 2-4,   (L 2020, - 1st)	20 Open Lab 2-4,   (L 2020, - 1st)	21

DECEMBER 2018

