



# Managing Project Phase Checklists

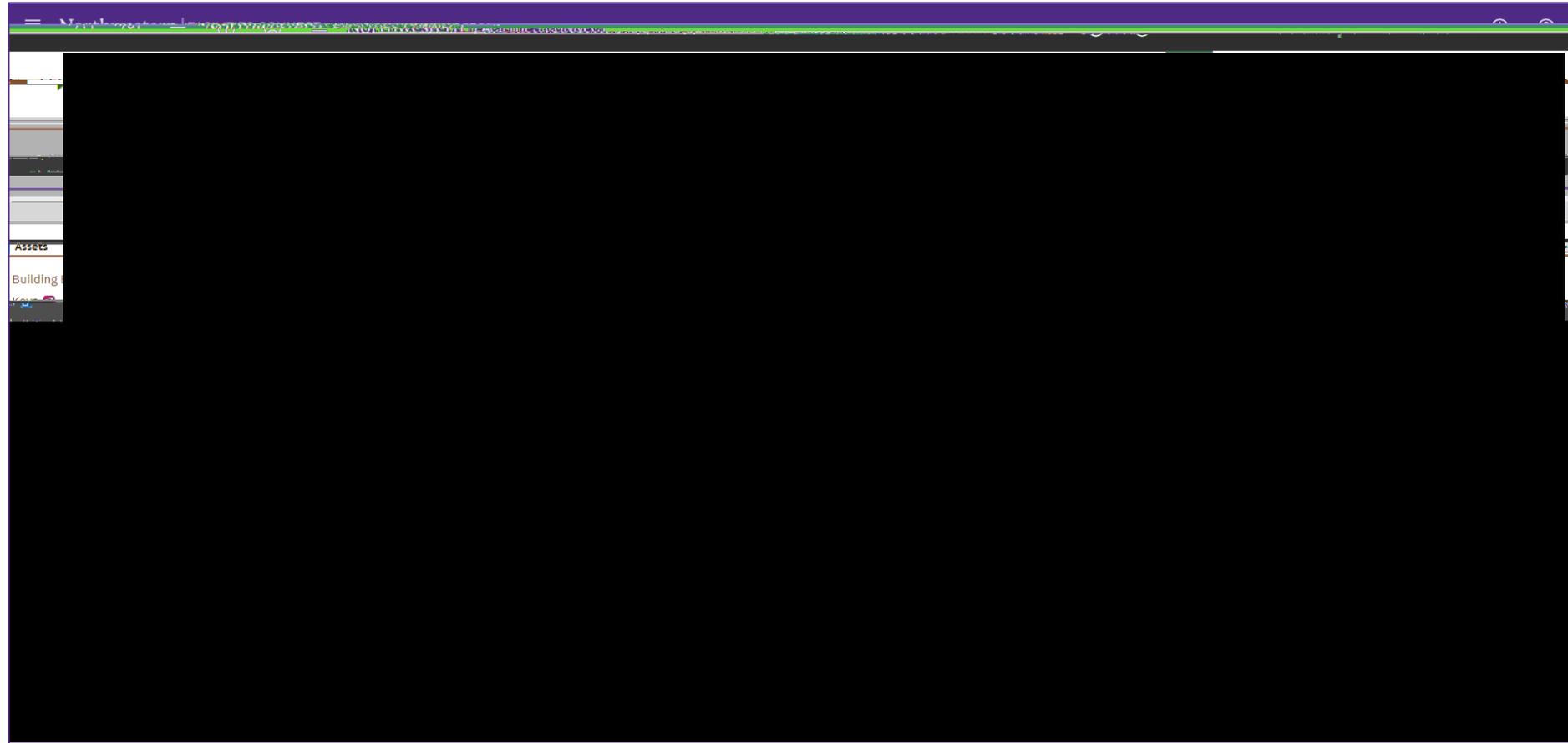


## DOCUMENT SUMMARY

---

## VERSION INFORMATION (THIS DOCUMENT)

TM

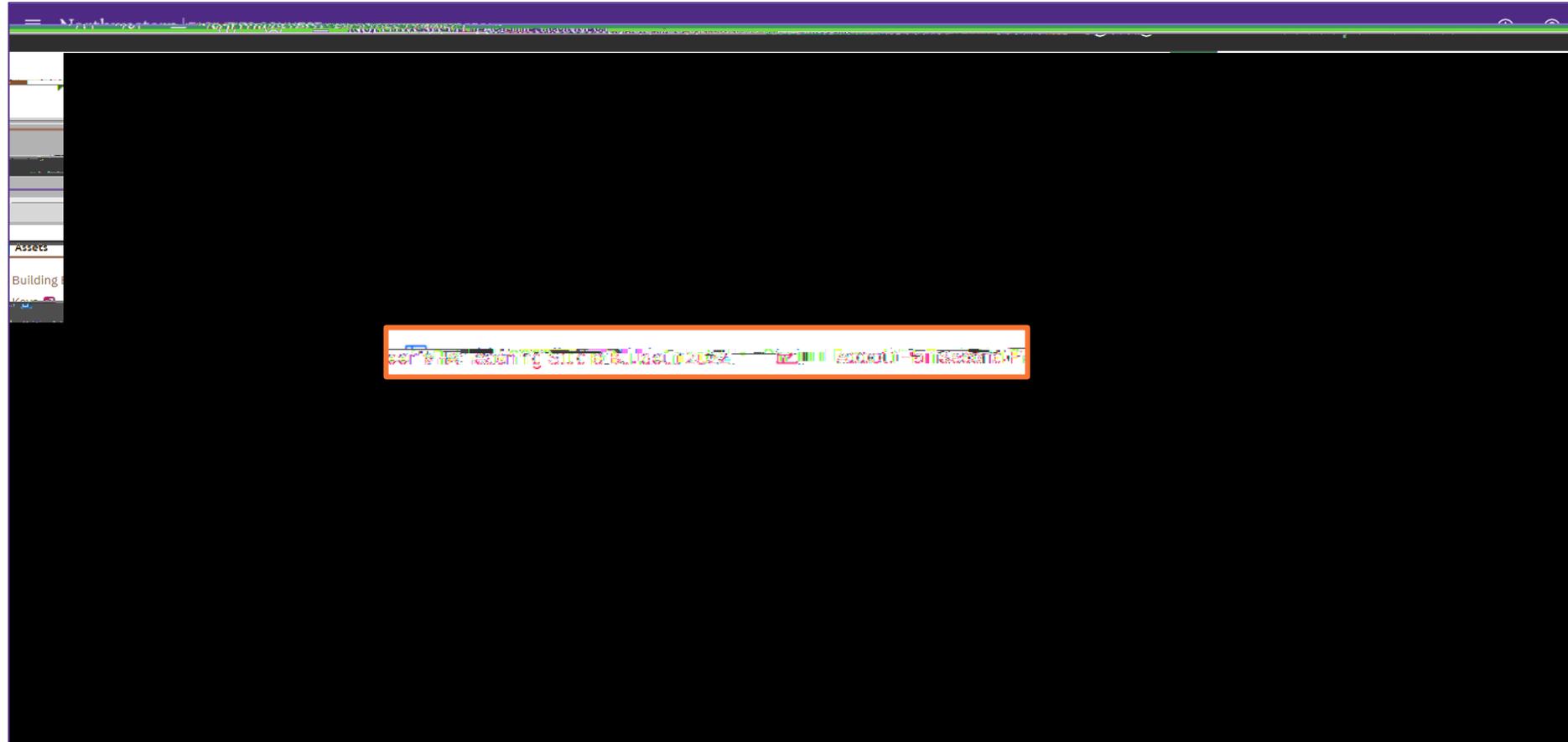


### 3 GETTING STARTED

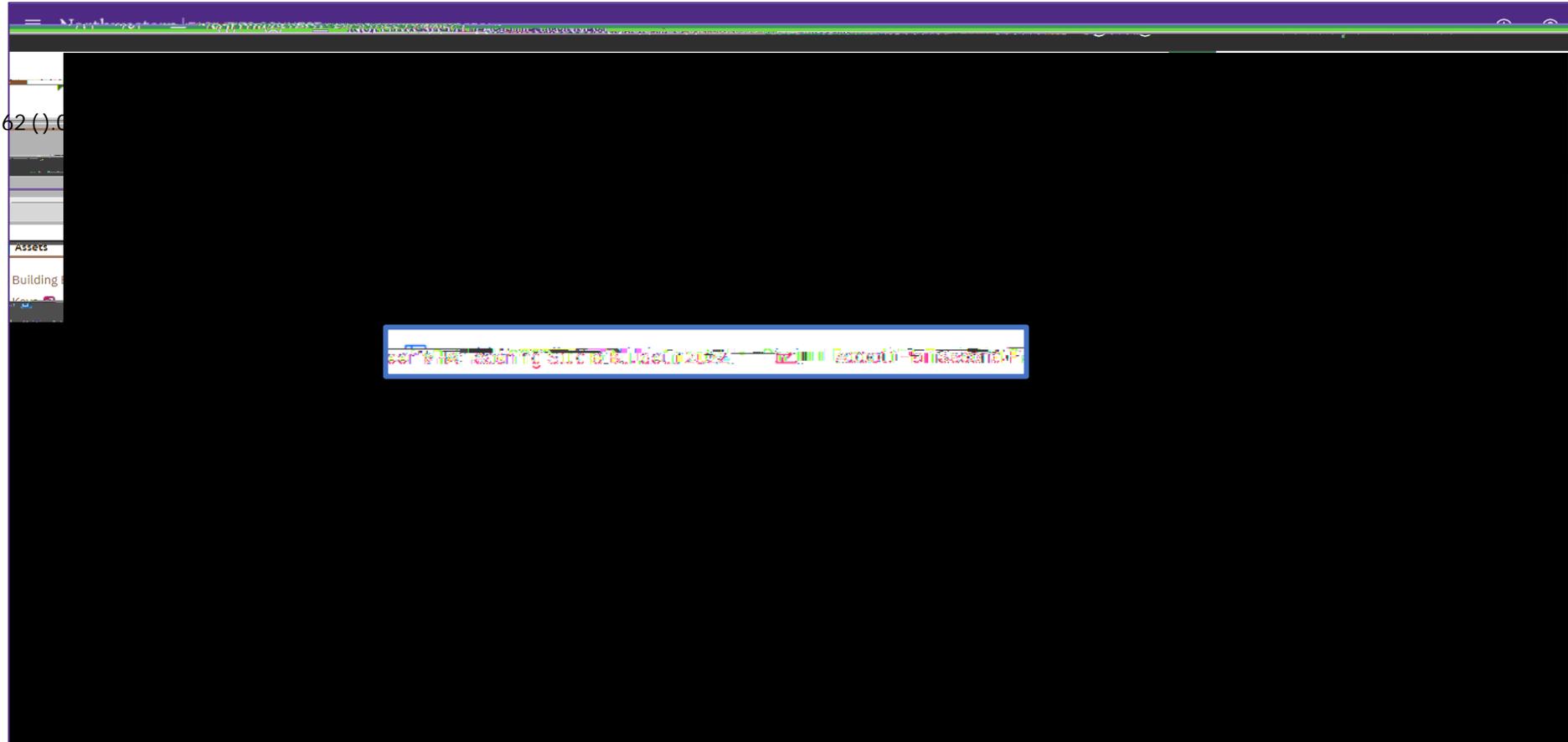
™ Locate your desired project, contained within the 'My Projects' Phase portlets (center of **Facilities Connect Home Screen**).

f PROCESS

f IMPORTANT



- 1) Select your desired project to open in **Project Focus** by clicking on the **Project Focus Icon** immediately (i)-0.004 T13041614 62 (.)0











## 3 PROCESS

- 7) Next, enter the **Checklist Name** in the **Name** field; copy and paste the contents of the **Project Phase** field into the **Name** field.

**Note:** These two (2) fields should match exactly before proceeding to the next step

- 8) Next, create a draft of your **Project Phase Checklist**; click on the **Create Draft** button (upper right of the form).

<<Upon clicking, the Project Phase Checklist draft is saved, and new action buttons will appear at the upper right of the form>>

The screenshot displays the 'Project Phase Checklist' form. At the top, there is a header bar with 'Audit Actions' on the left and 'Create Draft' and 'Cancel' buttons on the right. A red circle with the number '8' highlights the 'Create Draft' button. Below the header, there is a text area containing the instruction: 'The Phase Checklist provides a project view of open or outstanding items that are to be addressed prior to ending the current Project Phase. When all items are complete or determined to be not applicable to the current Project Phase, Issue the Checklist record.' A red circle with the number '7' highlights the 'Name' field, which is currently empty. Below the 'Name' field, there is a 'Revision' field with the value '0' and a 'Date' field with the value 'U4/U1/2022'. The form is set against a dark background.

## 3 PROCESS

9) Now that the checklist draft has been created, populate **Project Checklist Items** by clicking the **More** button (upper right of the form).

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

<<Upon clicking, a new search window will open for selection of Project Checklist Items >>

The screenshot displays the 'Project Phase Checklist Form' interface. At the top, there's a header with 'NOW VIEWING PROJECT PHASE CHECKLIST FORM'. Below the header, the form is divided into sections. The 'Audit Actions' section at the top right has a 'More' button highlighted with a red box and a circled '9'. Below this, the 'Project Checklist Items' section is visible, with another 'More' button highlighted with a red box and a circled '10'. A 'Checklists Template PopUp' window is overlaid on the bottom right, showing a table with columns for 'Checklist Name', 'Closeout Checklist ID', and 'Checklist Type'. The table contains three rows, each with a 'Contains' button. The background shows a form with fields for 'ID', 'Revision' (0), 'Date' (U4/01/2022), and 'Status'.



**3 PROCESS**

The **Project Checklist Items** are now populated as a numbered list, representing the typical sequence of activities to occur in the given **Project Phase**

You can view the full list of all e PI 2.4 3 (Id)77ca

**f IMPORTANT**

Always be aware of the number of **Project Checklist Items** belonging to the given project phase. This is indicated by the **Number of Records Found** located immediately below the section header. In order to view the full list of **Project Checklist Items**, you may need to adjust the number of records (i.e. checklist items) displayed using the **Show** dropdown box on the right side of this section.

The screenshot displays the 'Project Phase Checklist Form' interface. At the top, a 'Save' button is highlighted with an orange box. Below it, a table lists project phases, with '0.0 Initial Request' selected. The bottom section, titled 'Project Checklist Items', shows a summary '10 total found' highlighted with an orange box, and a table with columns for 'Complete?', 'Project Manager', and 'Show Checklist Item'. A 'Show' dropdown menu is also highlighted with an orange box.



NOW VIEWING

- 15) As you complete a **Project Phase Checklist**, use the

Phase Checklist: 1001554 - 0 - 0.0 Initial Request

Save Save & Close

Revision 0 Status Draft ID 1001554

Date 01/07/2022

Name 0.0 Initial Request

Checklist Type Project Phase Project Phase 0.0 Initial Request

Comment

Associated Project

Current Project Phase	ID	Name
0.0 Initial Request	1001705	0.0 Initial Request

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

Project Checklist Items

Sort by Checklist Category, Checklist Item

Depending on individual phase length and project dynamics, you may need to update a **Project Phase Checklist** over multiple sessions. Use the **Save** and/or **Save & Close** buttons to save your progress until you are ready to submit the completed checklist to your **Project Director**.

NOW VIEWING

- 16) As you complete the **Project Phase Checklist** and prepare for submission, update the **Comment** field with a brief message to your **Project Director**. In this message, be sure to include the following:

t14

Phase Checklist: 1001554 - 0 - 0.0 Initial Request

Revision: 0      Status: Draft      ID: 1001554

Name: 0.0 Initial Request

Checklist Time:      Project Phase: 0.0 Initial Request

Comment:

Associated Project

Current Project Phase	ID	Name
0.0 Initial Request	1001705	0.0 Initial Request

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

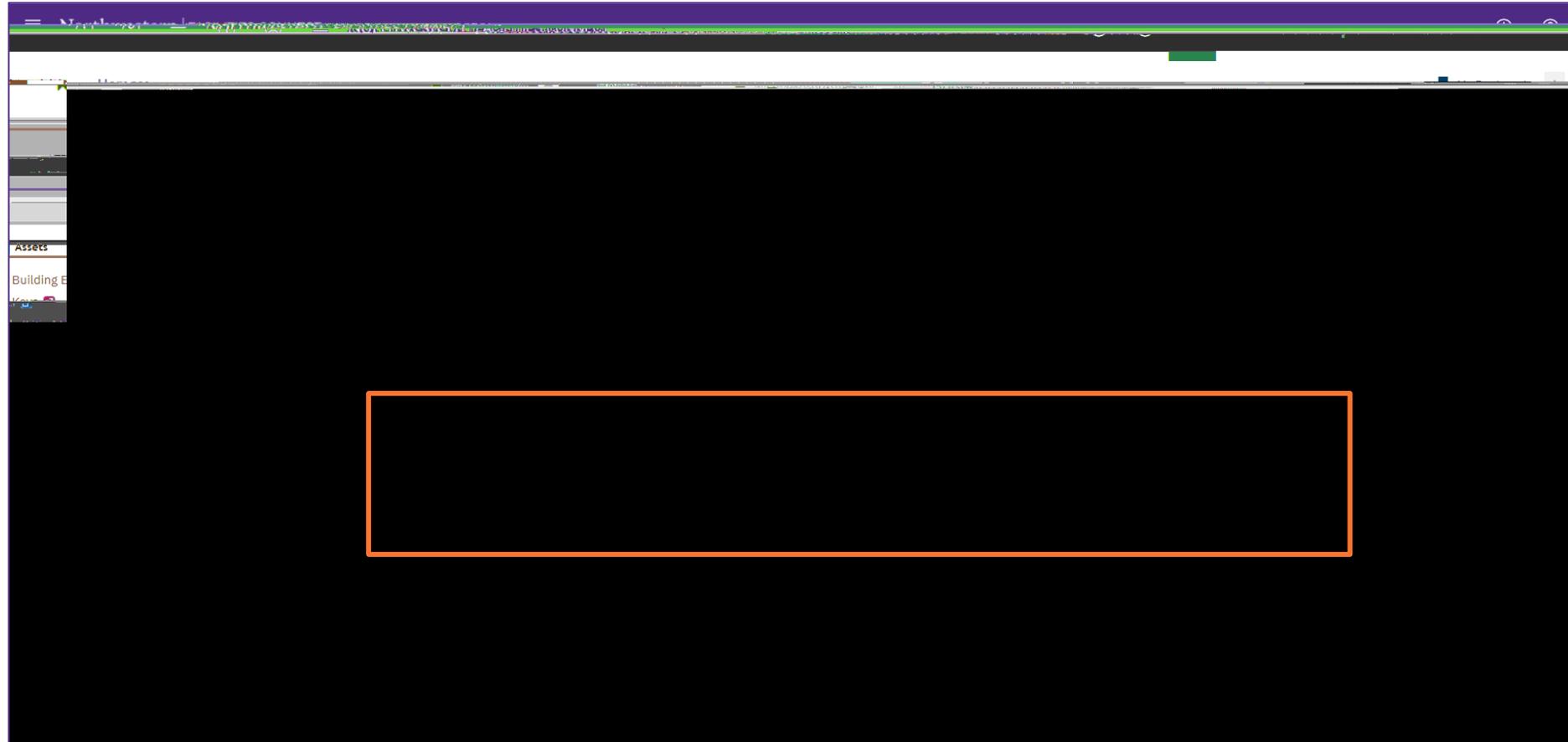
Project Checklist Items

Sort by Checklist Category	Checklist Item	Completed	Created By	Created Date	Updated By	Updated Date

### 3 PROCESS

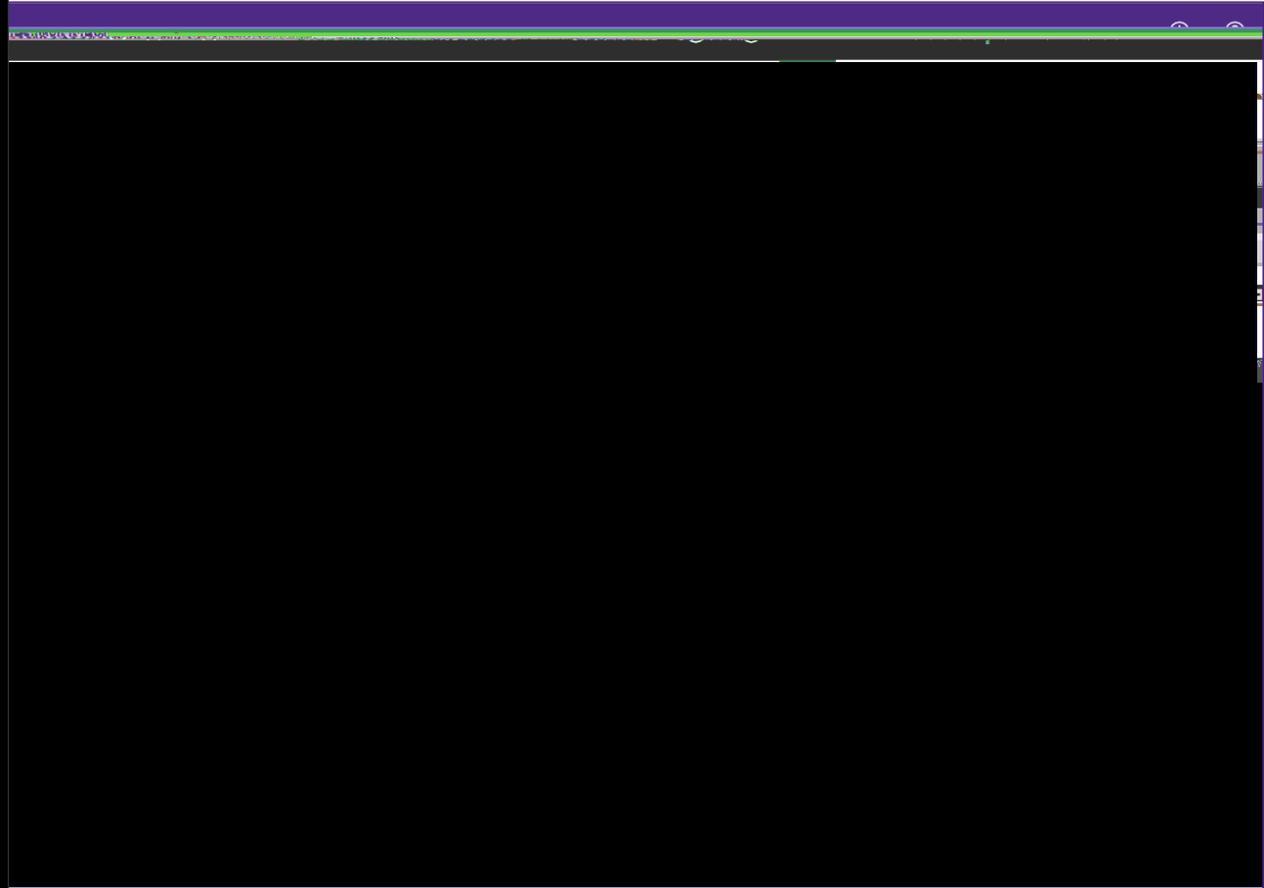
Once the **Project Director** has reviewed your **Project Phase Checklist**, they will take one of two (2) available actions:

1. **Approval** - the checklist is advanced to the requested project phase and will move between your **'My Projects' Phase** portlets, indicating the change in status and advancement of project phase.



**f** IMPORTANT

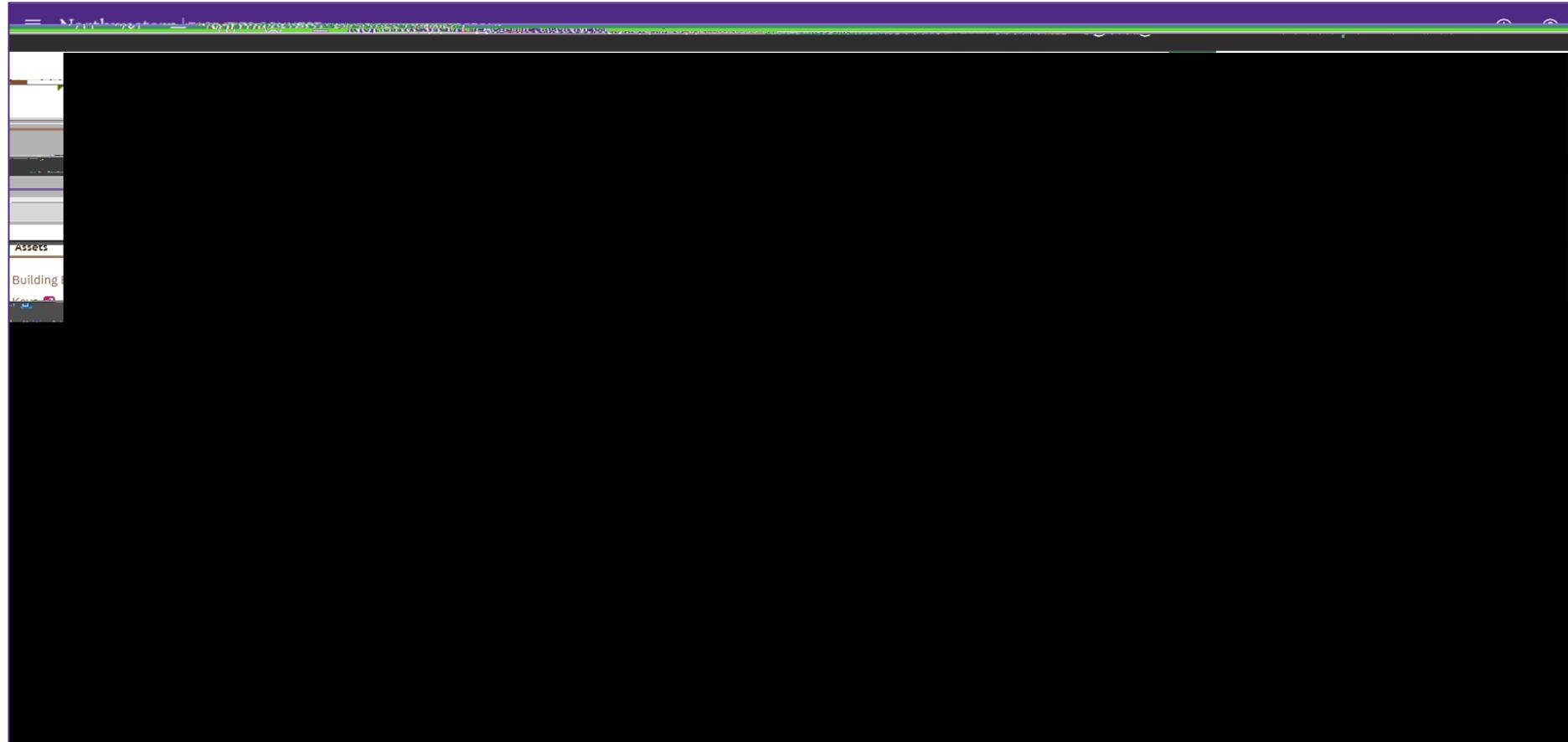
NOW VIEWING



To revise the **Project Phase Checklist**,

- 1) Click on the revision item in the **Project Checklists In Revision** portlet.

<<Upon clicking, the Project Phase Checklist will in a new window>>



## 3 PROCESS

- 2) Review the comments and/or revision request(s) the **Project Director** has added in the **Comment** field.
- 3) Based on the feedback, make any necessary modifications to the **Project Checklist / Checklist Items**.  
**Tip:** Use the **Save** and/or **Save & Close** buttons to save your progress until you are ready to re-submit the checklist to your **Project Director**.
- 4) When you are ready re-submit the revised checklist to the **Project Director**, click on the **Issue** button.

The screenshot shows the 'Project Phase Checklist Form' interface. At the top, the browser address bar displays 'Phase Checklist: 1001554 - 0 - 0.0 Initial Request'. The form includes a 'Revision' field set to '0' and a 'Status' field set to 'Draft'. The 'ID' field is '1001554'. A table lists the checklist items, with the first item being '0.0 Initial Request' under the 'Project Phase' category. A large text area for 'Comment' is visible below the table. At the bottom, there is a table for 'Current Project Phase' with columns for 'ID' and 'Name'. The page footer shows '1 of 1 pages' and 'Items per page: 10'.

Annotations on the screenshot include:

- A red circle with the number '2' highlights the 'Comment' field.
- A red circle with the number '3' highlights the 'Project Checklist Items' table.
- A red circle with the number '4' highlights the 'Save' and 'Save & Close' buttons at the top of the form.