



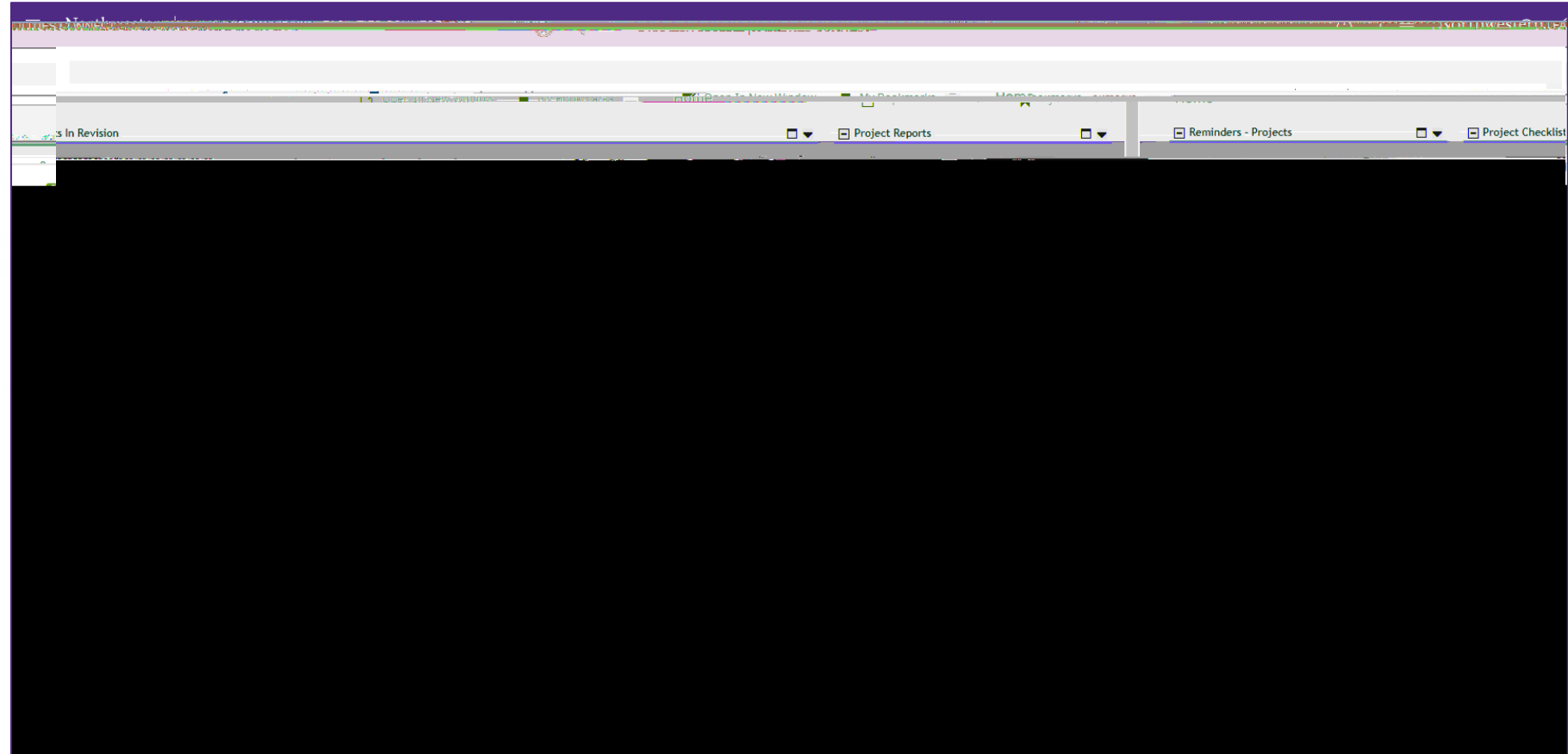
# A , , D ,

These dates should be included in the initial project record set up. But it is best practice for the **Project Manager** to confirm the dates during your project record set up completion process.

™ To begin, access the **Facilities Connect Home Screen**

™ In order to review **Project Financials** as outlined in this job guide, the project must:

- a. Be an existing project, already created in **Facilities Connect**.
- b. Have its **Project Category** selected as **Capitalized** and include a capital chartstring.



▶ PROCESS

▶ IMPORTANT



**▼ PROCESS**

Locate your desired project, contained within the list on the left side of the screen.

Click on the project name to the left of the project details.

Project Name	Project Focus	Project Status

**► IMPORTANT**



## PROCESS

2) Click **Revise** to make changes to the Project Record.

The screenshot shows a web-based project management interface. At the top, there are tabs for 'Complete', 'Revise', 'General', 'Scope', 'Schedule', 'Budget', 'Procurement', 'Contacts', and 'Notes & Documents'. The 'Revise' tab is selected. Below the tabs, there is a project record for ID 1002000, which is 'Active'. The record includes the following details:

- ID: 1002000
- Status: Active
- Date: 09/21/2023
- Name: Morton CREPS Feeder FY24
- Project Reporting Name: Morton CREPS Feeder FY24
- Project Classification: Systems Deployment
- Project Phase: 2.0 - Design
- Laser Fiche: <https://fmlaserfiche01.ads.northwestern.edu/laserfiche/Browse.aspx?repo=NUFM#?id=110338>
- Project Cost (SnE) (Budget Current / Project Gross Construction Area): \$ 0.00 / US Dollars
- Primary Customer Contact: [Redacted]

There are also sections for 'Environmental' and 'Primary Customer Contact' which are partially visible.

▶ IMPORTANT



PROCESS

Once the record is in Revise status,

click on the icon immediately to the left of the

3) Click on the **Schedule** tab.

Schedule

IMPORTANT

Árviðal Project: 1002000-Mórtón CREPS;æðar EYVA

Add 16 Bookmarks Print Help



## PROCESS

From the Schedule tab

Click the icon immediately to the left of the

4) Edit the **Plan Start** date, which represents the initiation of the project.

5) Edit the **Substantial Completion** date, which represents the date construction is to be completed.

6) Edit the **Anticipated Financial End** date, which represents the when all financial transactions should be completed and processed for the project.

Annual Project: 1002000-Morton CHEPS Bedier FY24

Import From Project | Export To MS Project | Summary

★ Plan Start	09/21/2023	25	×
★ Anticipated Financial End	05/31/2024	25	×
Calculated End	05/29/2024		
Actual Start	09/21/2023		
Calculated Start	09/21/2023		

Project Tasks Gantt

IMPORTANT



▼ PROCESS

Once the required fields have been updated,

7) Click **Save** to keep all date changes.

8) Click **Activate** to put the project record back into the Active status.

▶ IMPORTANT