

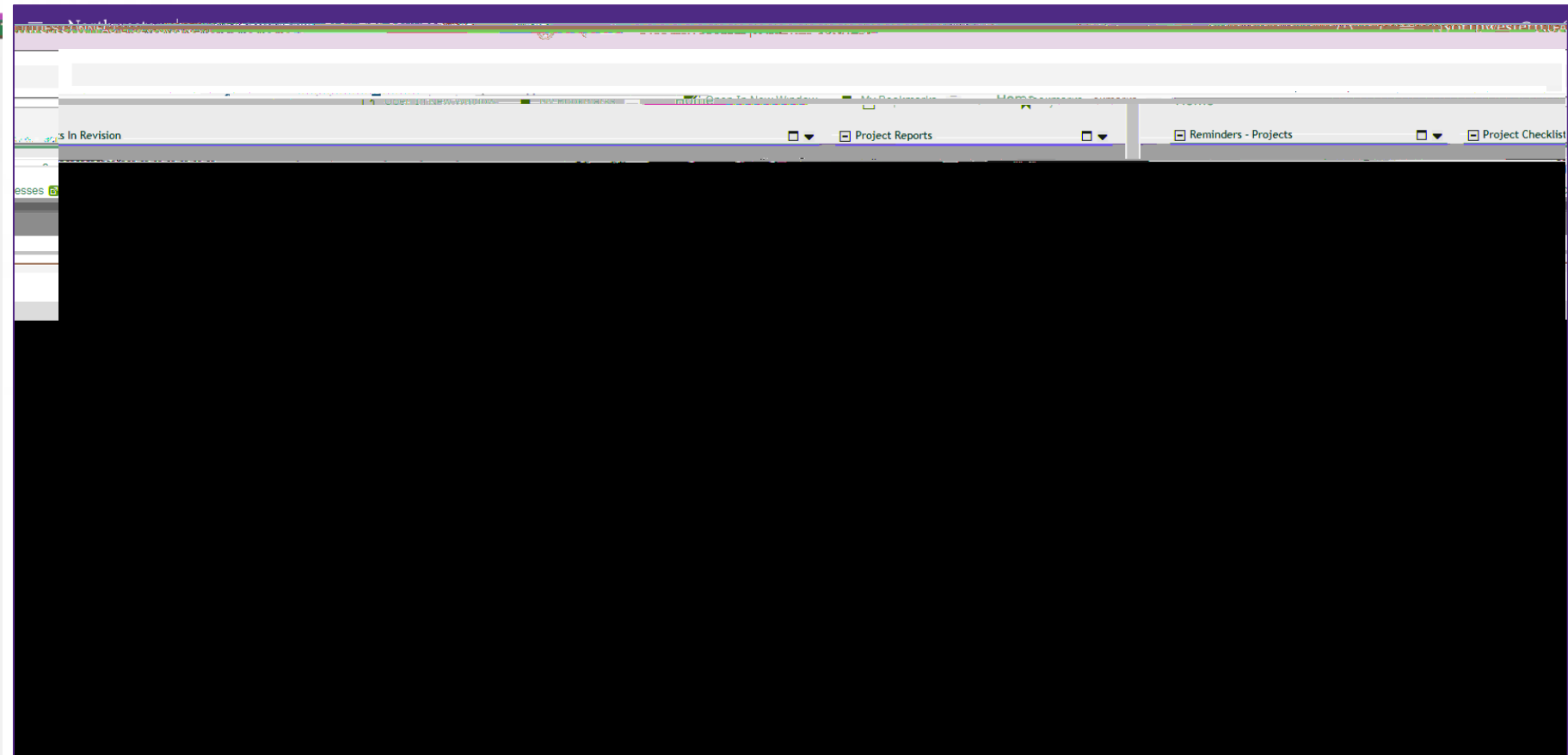
# A , , D ,

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

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

The screenshot displays a web-based project management interface. At the top, there are navigation tabs: Complete, Revise, General, Scope, Schedule, Budget, Procurement, Contacts, and Notes & Documents. The 'Revise' tab is currently selected. Below the tabs, the project details are shown for ID 1002000, which is in an 'Active' status. Key information includes the date 09/21/2023 and the project name 'Morton CREPS Feeder FY24'. The project reporting name is also 'Morton CREPS Feeder FY24'. The project classification is 'Systems Deployment' and the project phase is '2.0. Design'. A laser fiche link is provided: <https://fmlaserfiche01.ads.northwestern.edu/laserfiche/Browse.aspx?repo=NUFM#?id=110338>. The project cost is listed as \$ 0.00 in US Dollars. The interface also shows sections for 'Environmental' and 'Primary Customer Contact'.

▶ 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.

Project Focus

IMPORTANT

Árviðal Project: 1002000-Mórtón CREPS;æðar EYVA

Schedule



## 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.

Plan Start 09/21/2023

Anticipated Financial End 05/31/2024

Actual Start 09/21/2023

Calculated Start 09/21/2023



▼ PROCESS

Once the required fields have been updated, click **Save** to keep all date changes.

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

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

▶ IMPORTANT