Managing Project Phase Checklists

VERSION 1.2
UPDATED 11/15/2024

MANAGING PROJECT PHASE CHECKLISTS

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for locating, creating, and completing project phase checklists.

The purpose of this document is to serve as guided reference and/or new hire training on project task management and workflow functionality available to applicable users in Facilities Connect.

Note that as of November 2024, Capital Programs is only using one Phase Checklist template, regardless of project size.

VERSION INFORMATION (THIS DOCUMENT)

Version **1.2**   Release Date **11/15/2024**

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 (11/15/24)**

REVISION HISTORY

	Version	Release Date	Action	Owner
Most Recent →	1.2	11/15/2024	Updated	NU Facilities
	1.1	03/04/2022	Updated	NU Facilities
	1.0	02/18/2019	Created	NU Facilities
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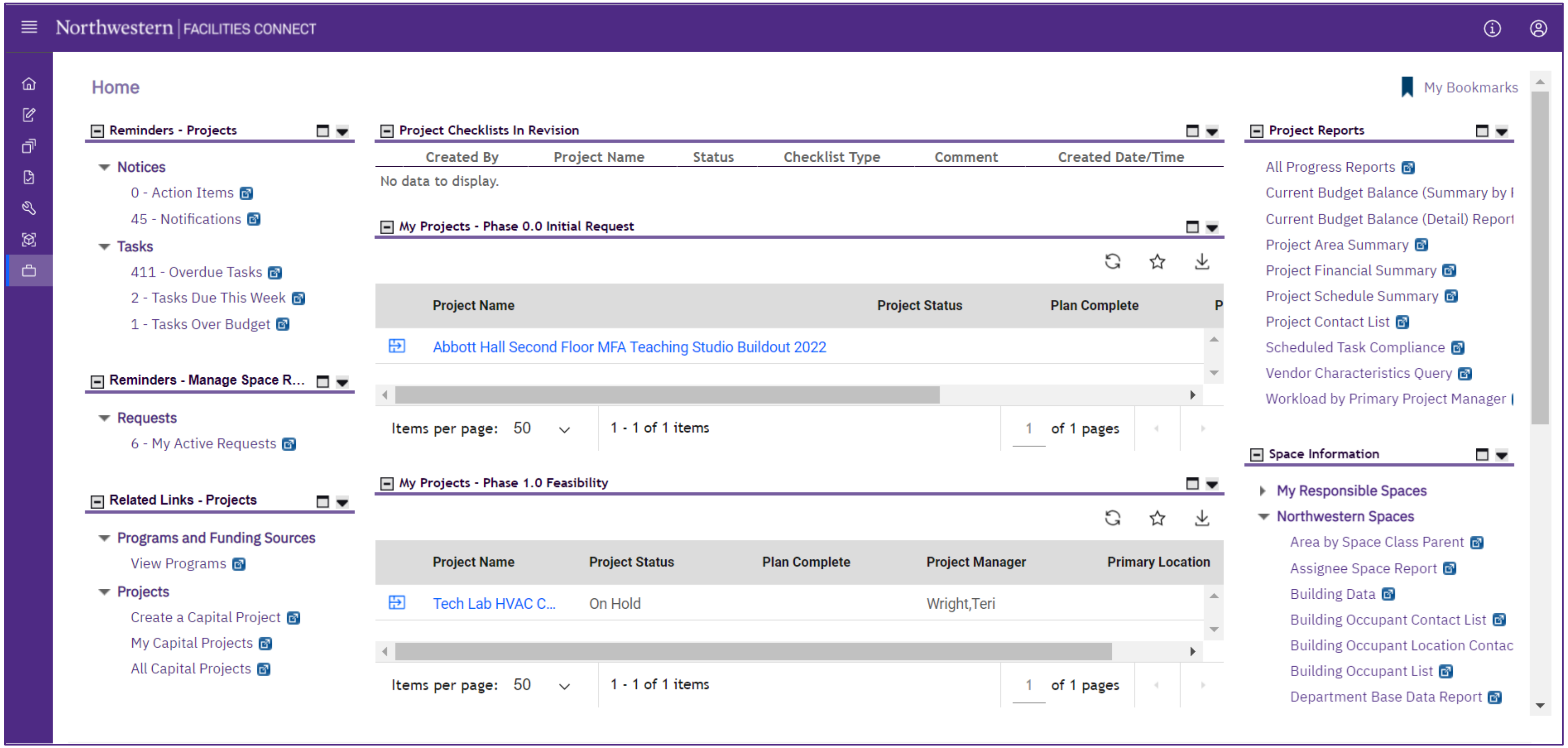
▼ GETTING STARTED

- To begin, access the **Facilities Connect Home Screen**
- In order to create a **Project Phase Checklist**, the project (for which you are creating the report) **must**:
    - a) Have already been created in Facilities Connect
    - b) Have a **Project Template** applied.

    Note: The Project Template only needs to be applied once; if it was already applied at project creation, do not reapply at this stage.

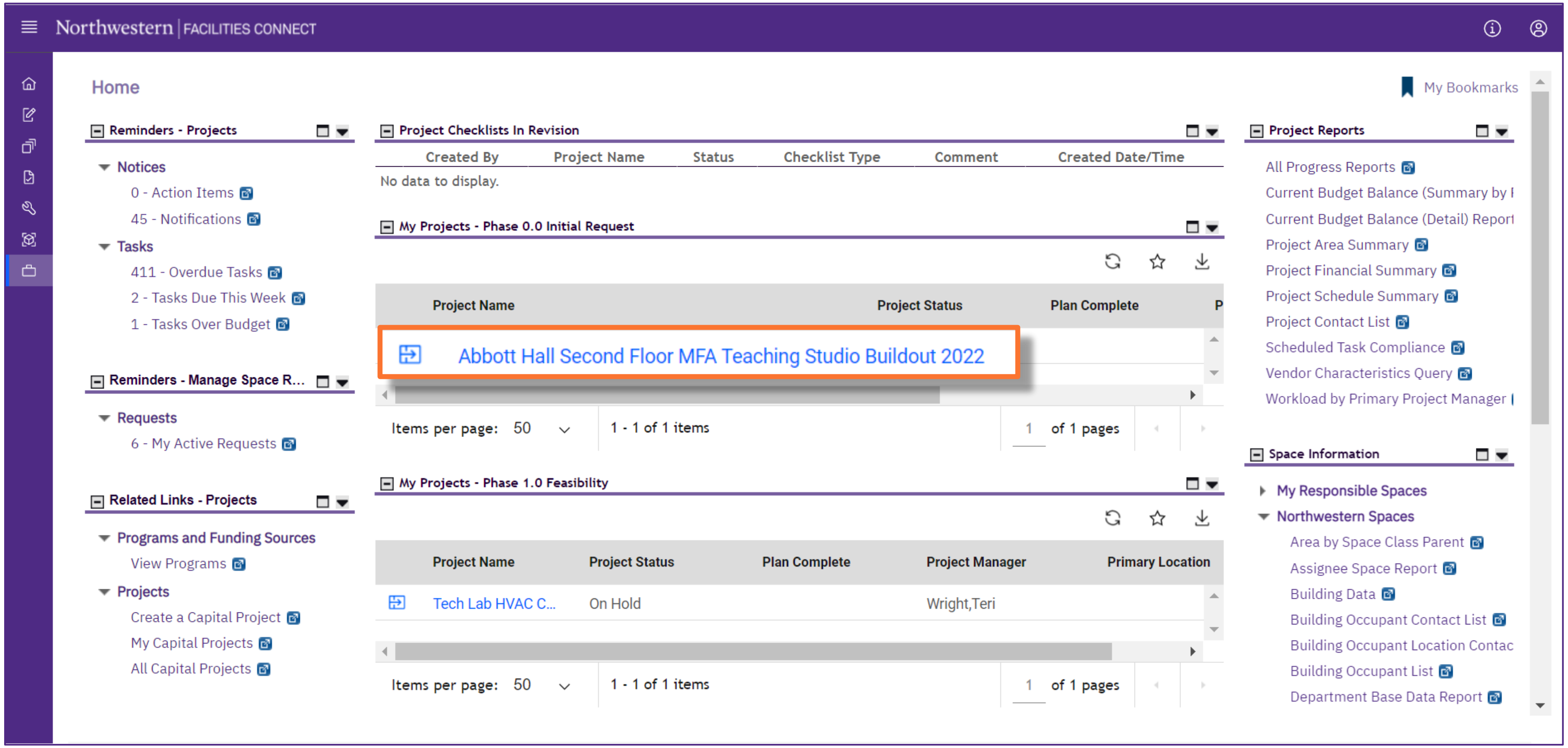


▶ PROCESS

▶ IMPORTANT

▼ GETTING STARTED

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



▶ PROCESS

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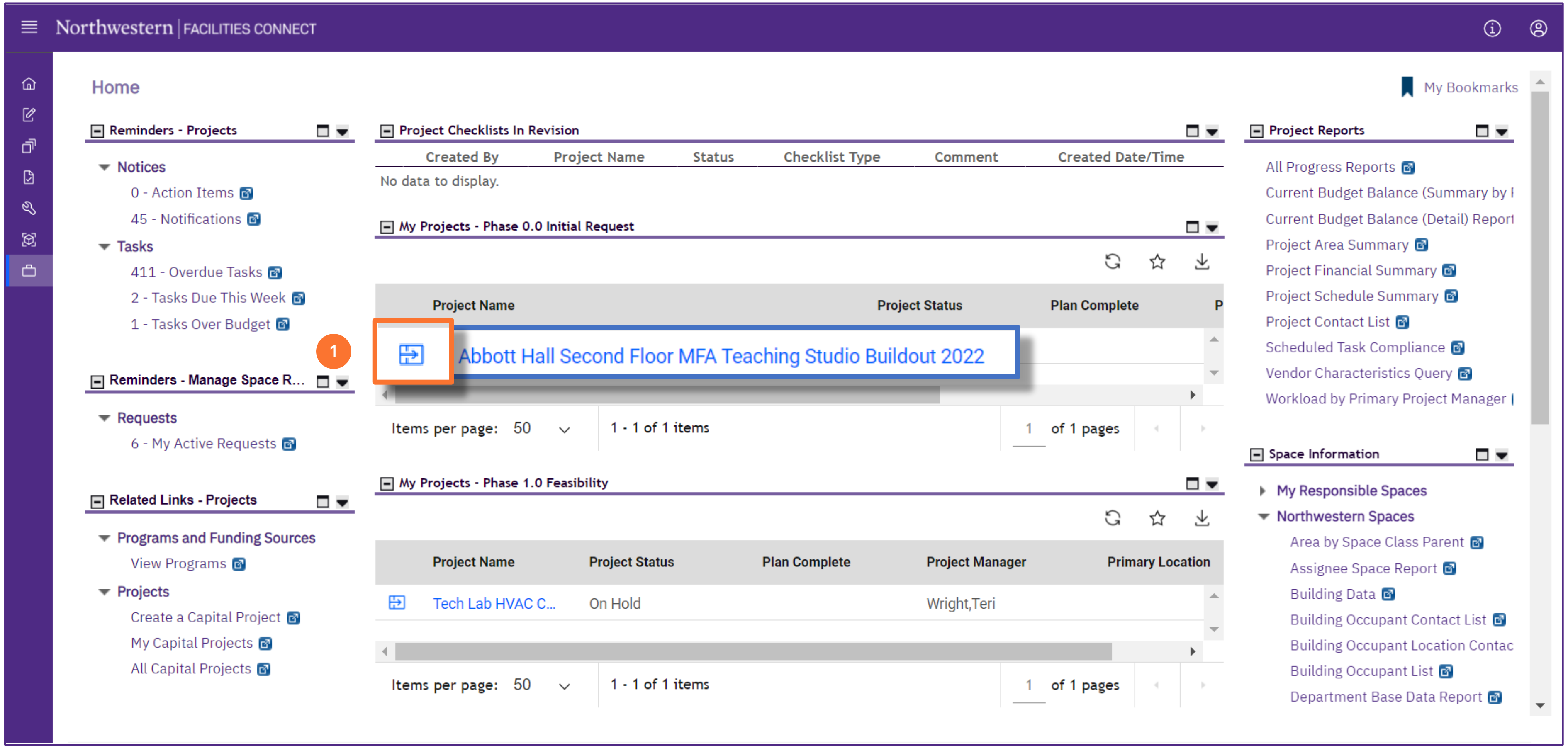
1) Select your desired project to open in **Project Focus** by clicking on the **Project Focus Icon** immediately to the left of the project name.

*<<Upon clicking, the **Project Focus** for the selected project will appear>>*

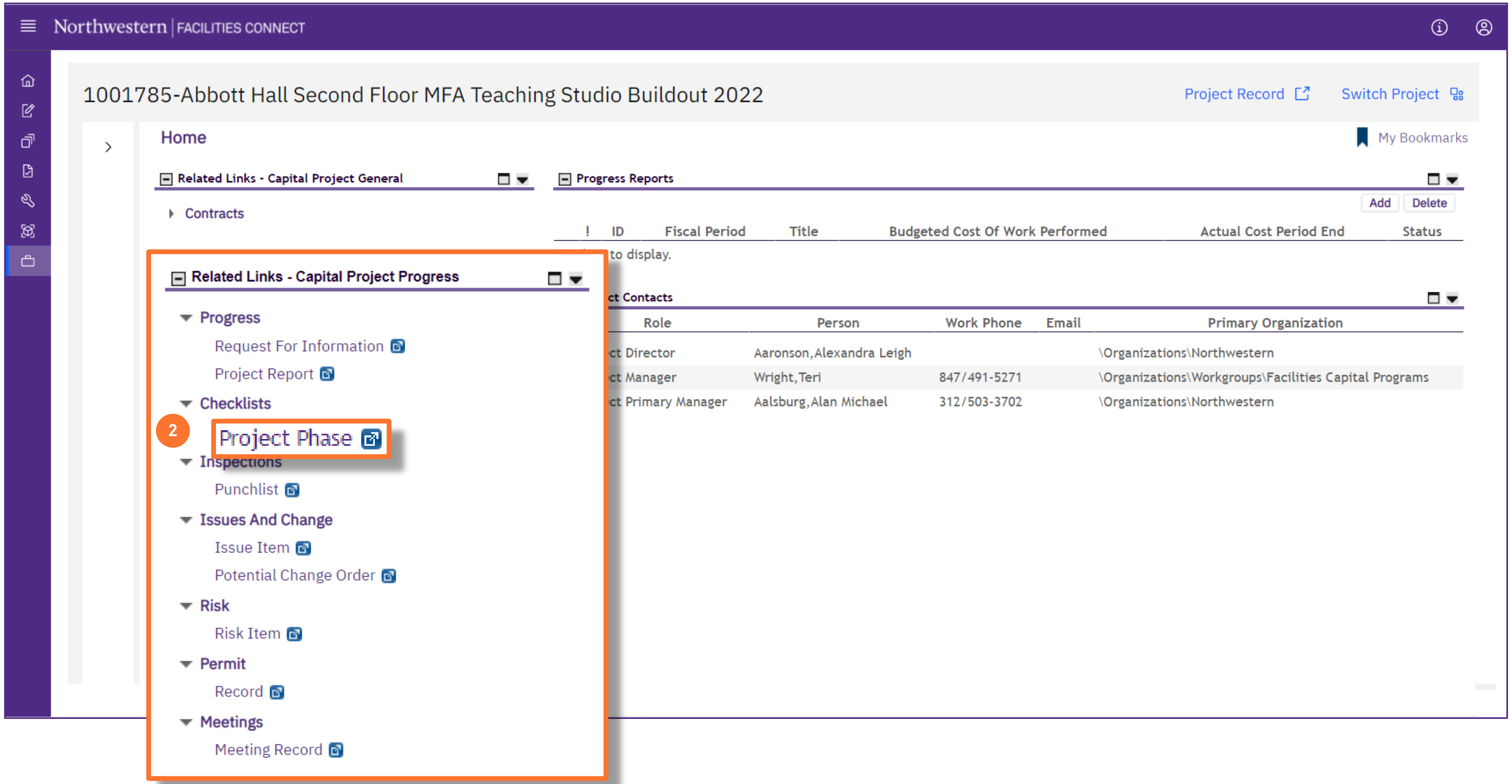


▶ IMPORTANT

▼ PROCESS

2) From the **Related Links – Capital Project Progress** portlet, under the **Checklists** group, click on the option for **Project Phase.**

*<<Upon clicking, the **Project Phase Checklist Menu** for the selected project will appear>>*

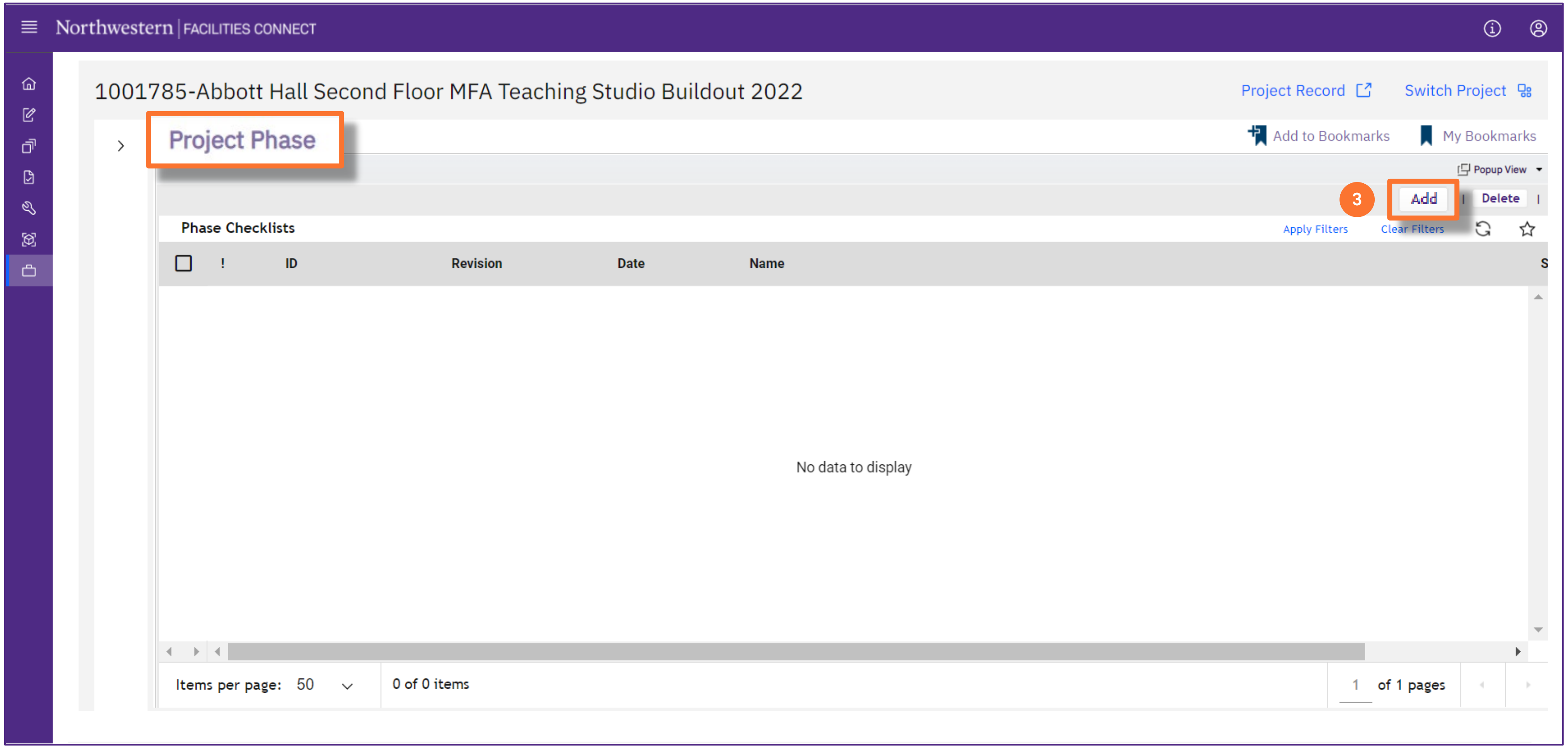


▶ IMPORTANT

▼ PROCESS

3) From the **Project Phase Checklist Menu**, click on the **Add** button to create a new phase checklist.

*<<Upon clicking, the **Project Phase Checklist Form** will open as a new window>>*

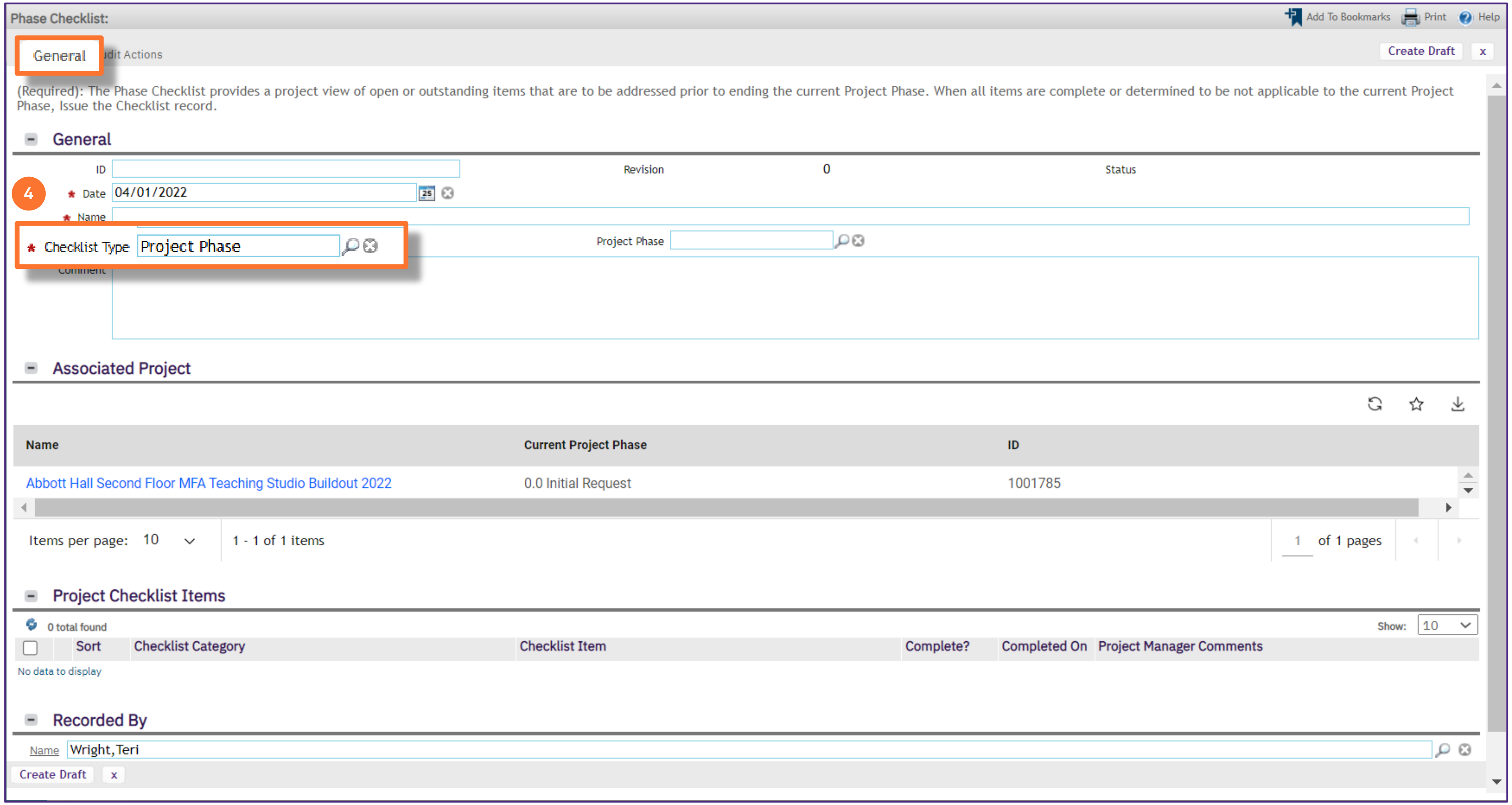


▶ IMPORTANT

▼ PROCESS

On the **General** tab of the **Project Phase Checklist Form**:

4) The **Checklist Type** option will auto-populate.



▶ IMPORTANT

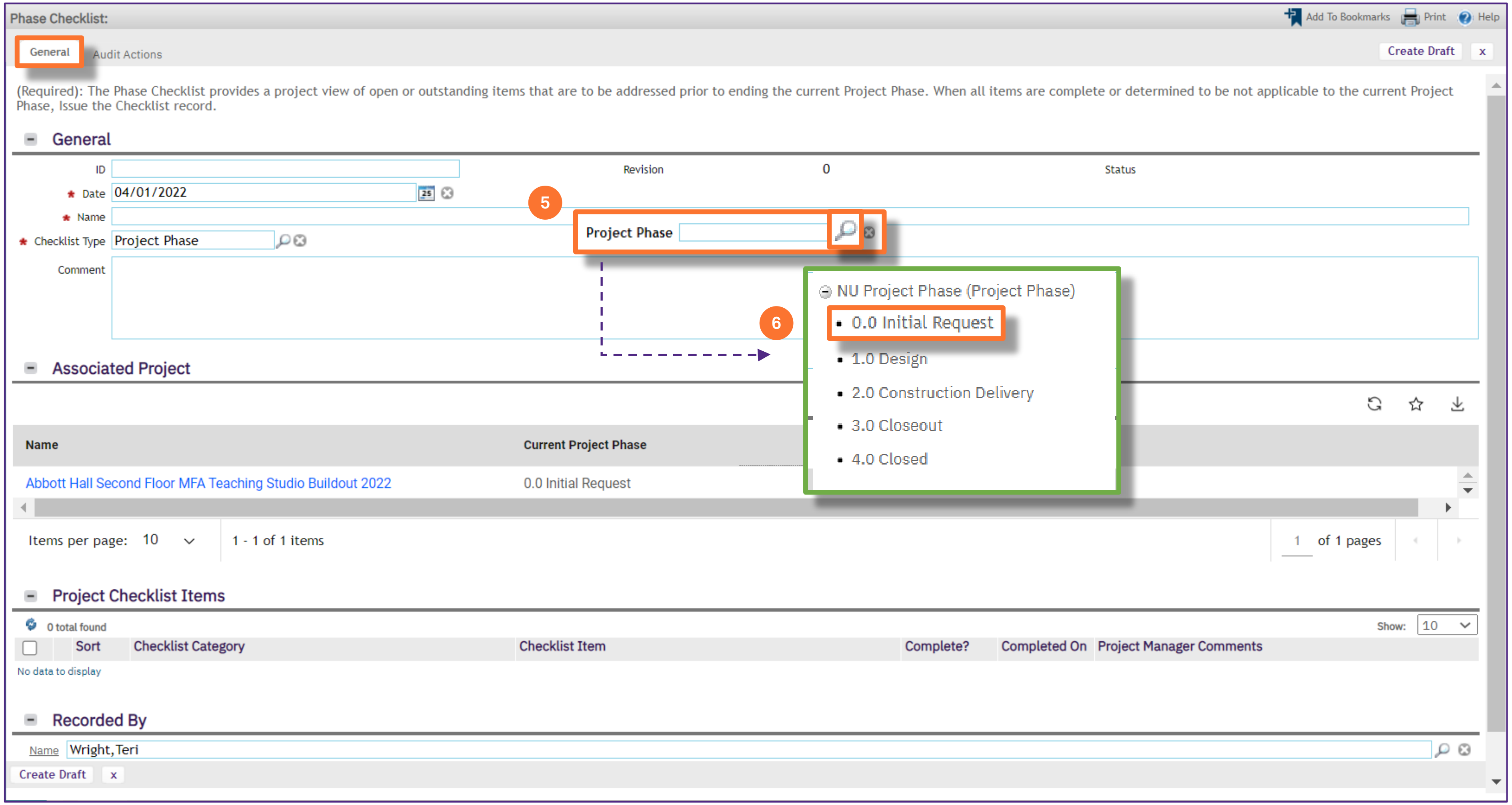
▼ PROCESS

5) Next, select the **Project Phase**; click on the **Magnifying Glass** icon (right of the field).

6) The **Project Phase** menu will now appear directly below; select the appropriate **Project Phase** from the menu.

▶ IMPORTANT

Select the Project Phase that matches the Current Project Phase shown on the form. As a Project Manager, you will mark completion status in the checklist for the project's current phase, not for the phase in which you are requesting advancement



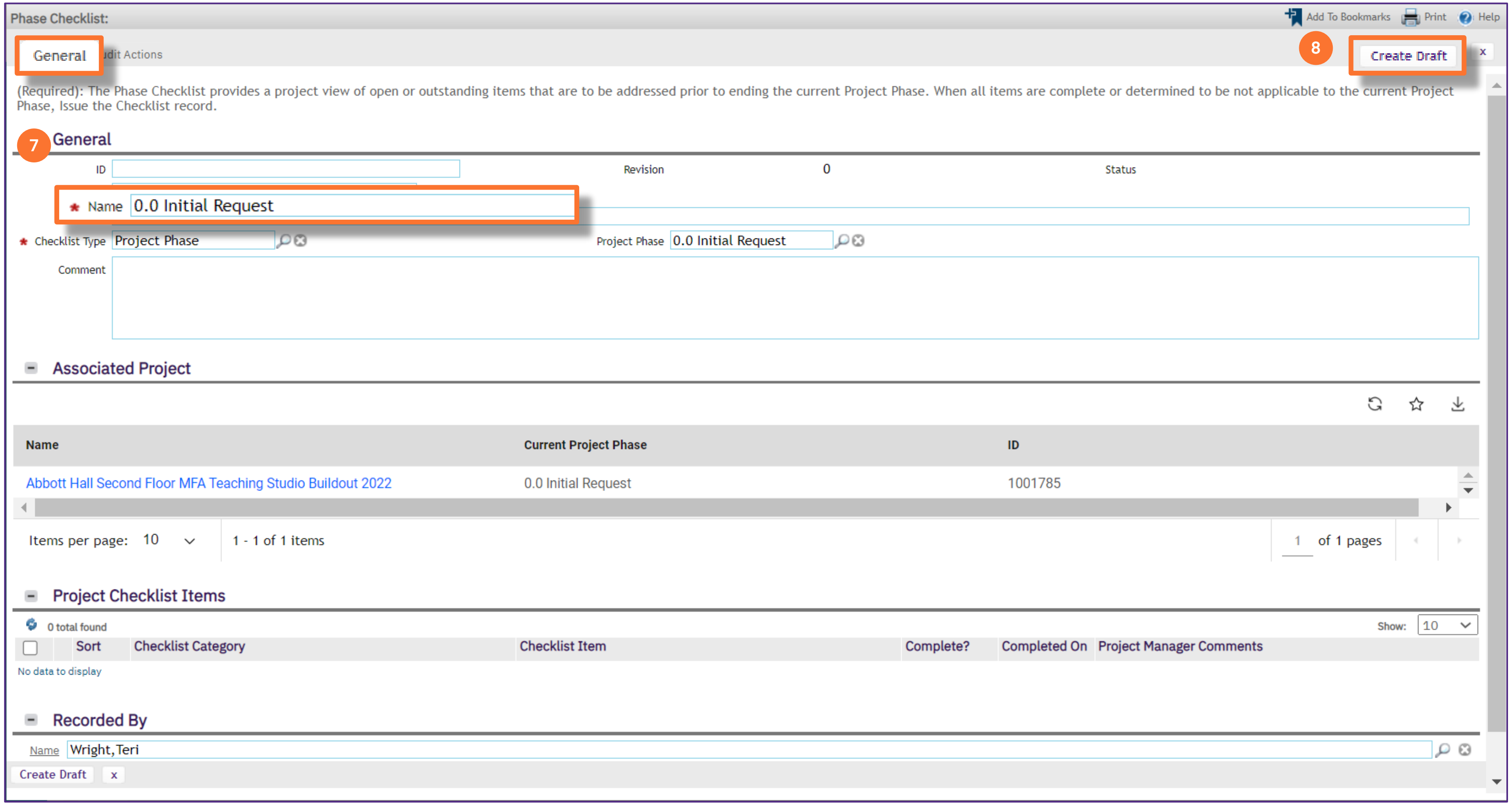
▼ PROCESS

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>>*



▶ IMPORTANT

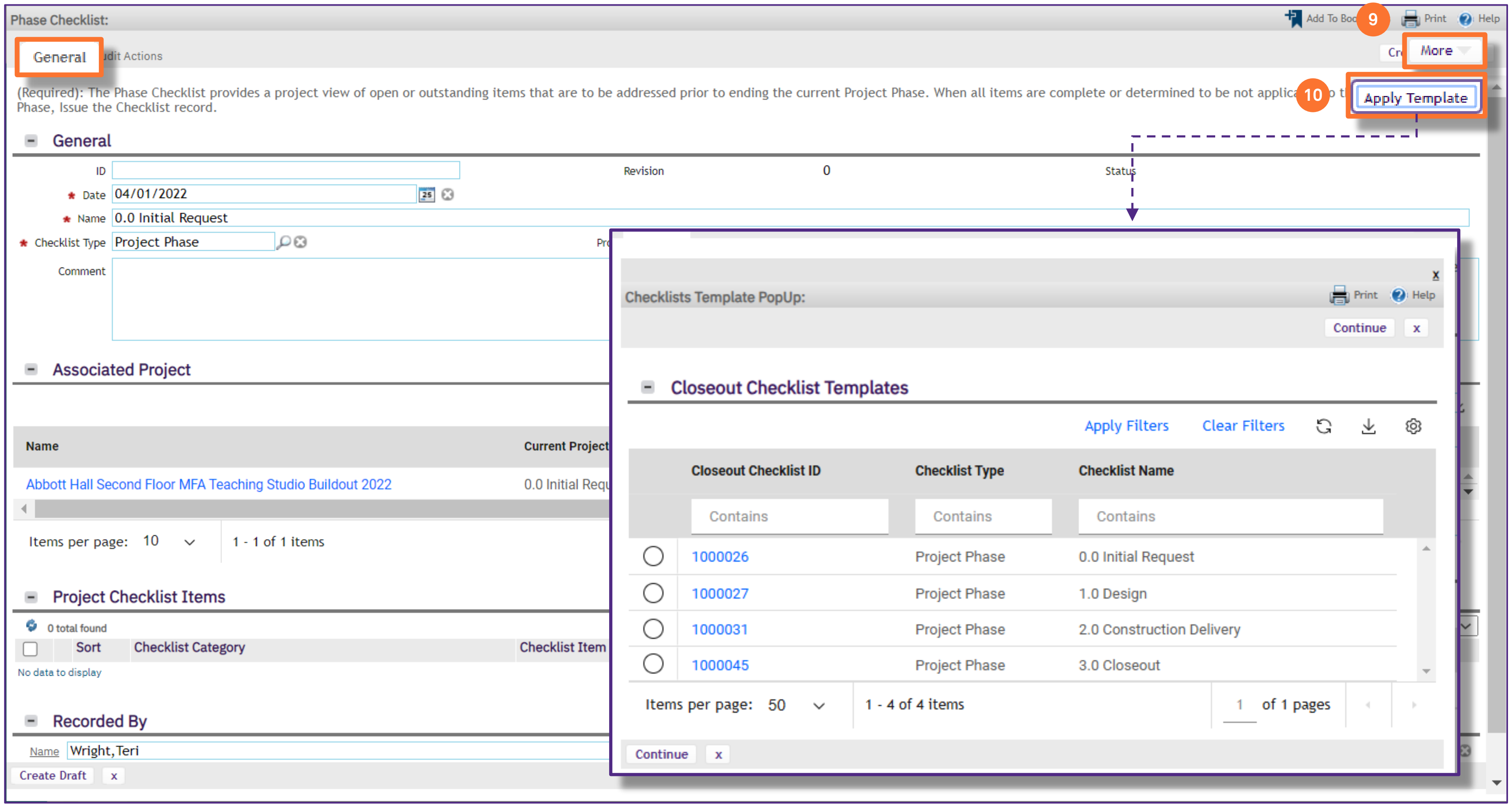
▼ PROCESS

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**>>*

▶ IMPORTANT



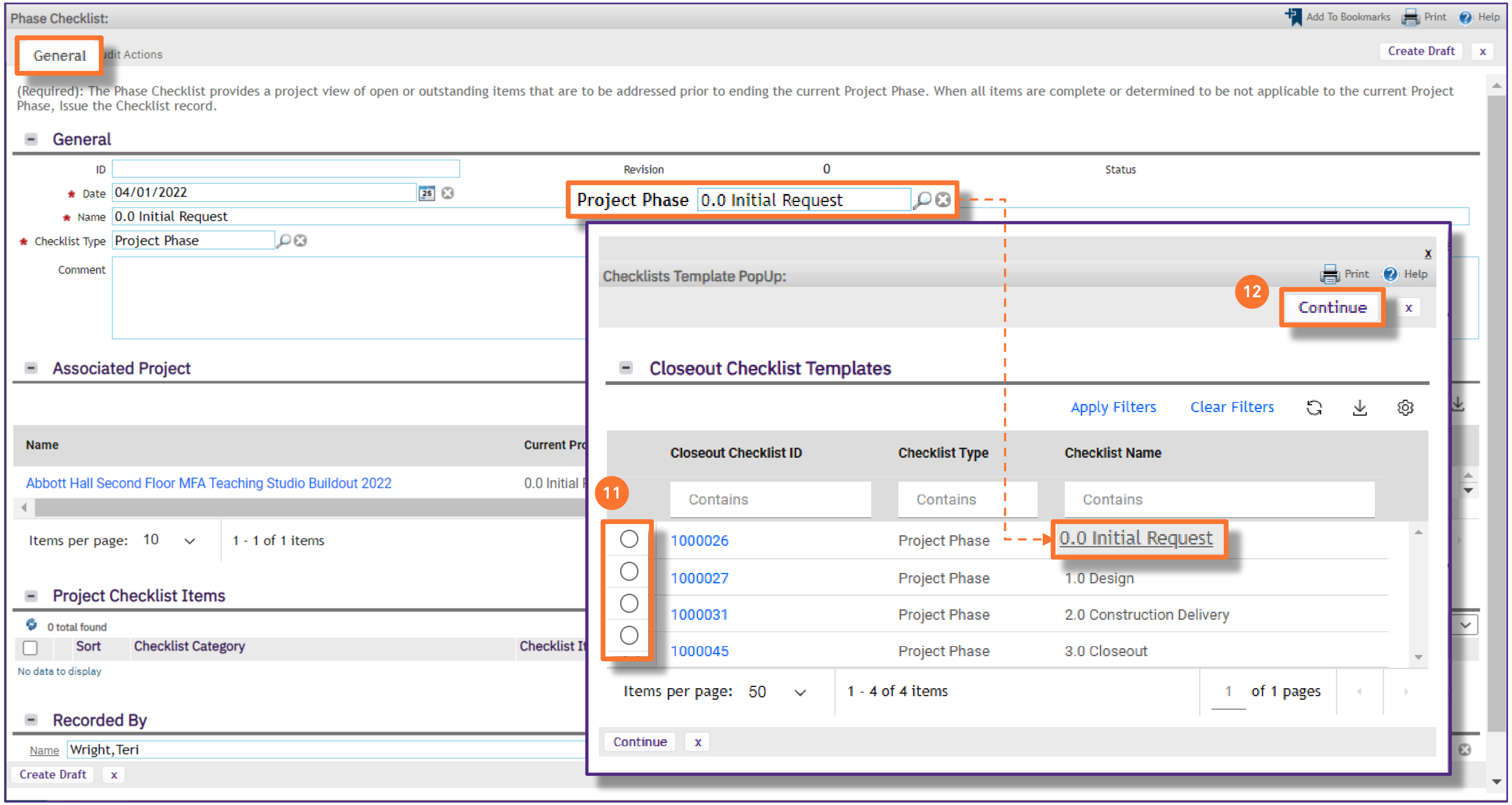
▼ PROCESS

11) Click the **Radio Button** for the current **Project Phase**; this will select the pre-defined list of **Project Checklist Items** aligned with that phase.

12) Next, click the **Continue** button to confirm the selection.

*<<Upon clicking, the search window will close, and the **Project Checklist Items** will be populated in the corresponding section of the form>>*

▶ IMPORTANT



▼ PROCESS

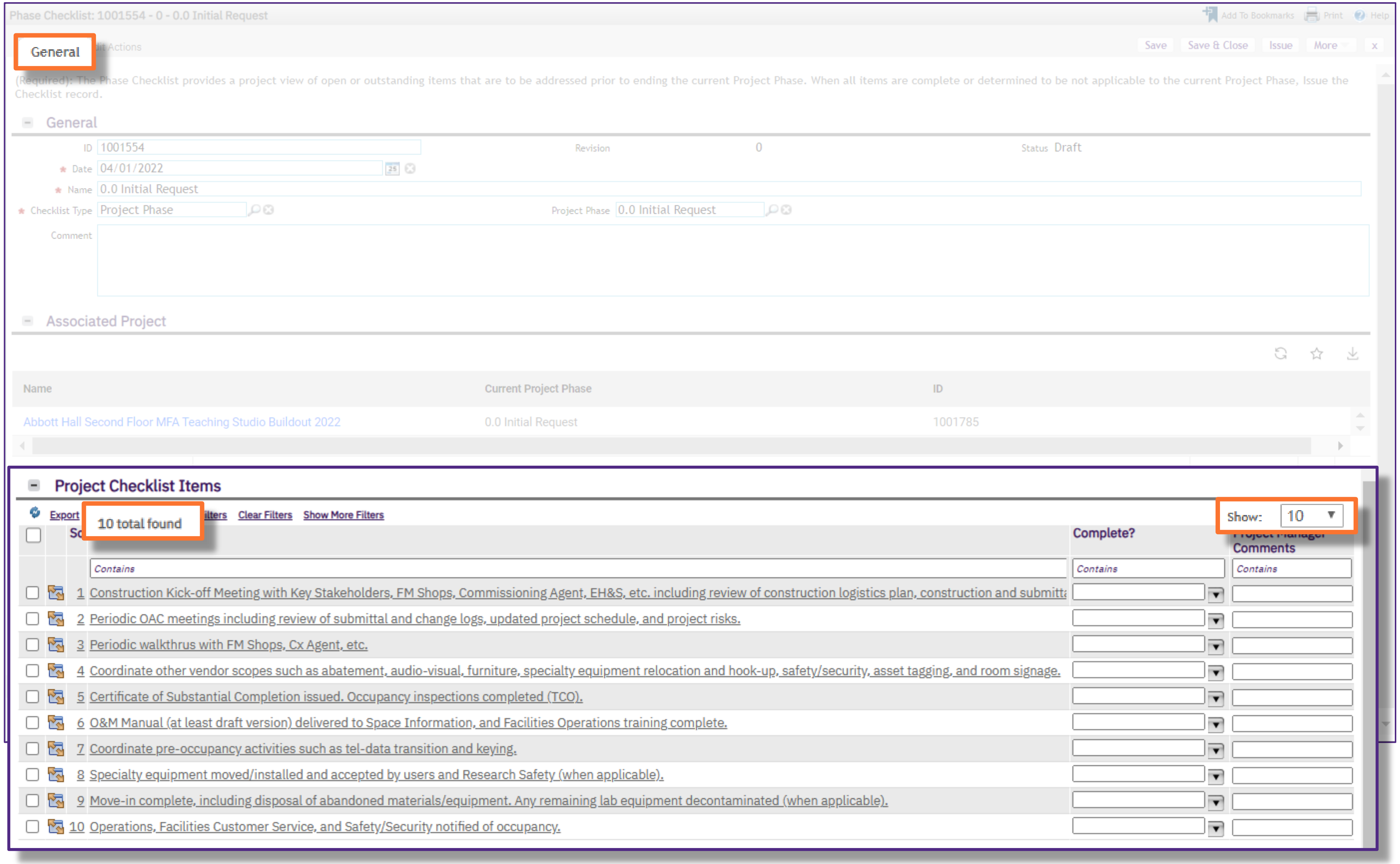
The **Project Checklist Items** are now populated as a numbered list, representing the typical sequence of activities to occur in the given **Project Phase**

▶ INFORMATION

You can view the full list of all **Project Checklist Items** related to all Phases on the **Project Phase Checklist Tasks** quick guide on the FC training site.

▶ 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.



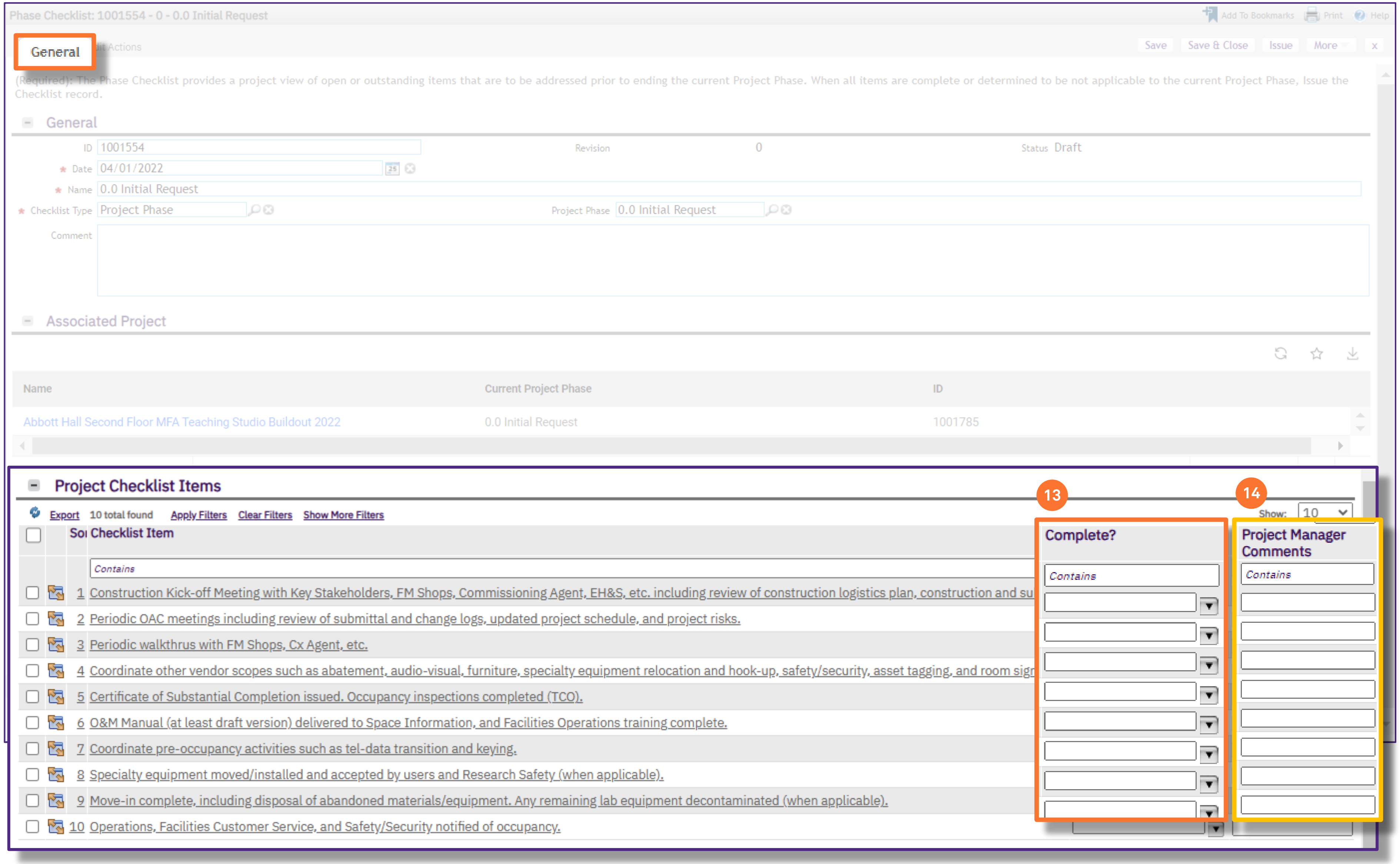
▼ PROCESS

To complete the **Project Phase Checklist**, perform the following steps for **each** of the **Project Checklist Items**:

13) In the **Complete** column, use the dropdown box to select the **Completion Status** of the item. The available options are:
    - **Yes** – indicates the specific Project Checklist Item has been completed
    - **N/A** – indicates the specific Project Checklist Item is not applicable to the current project (PM Comment required)

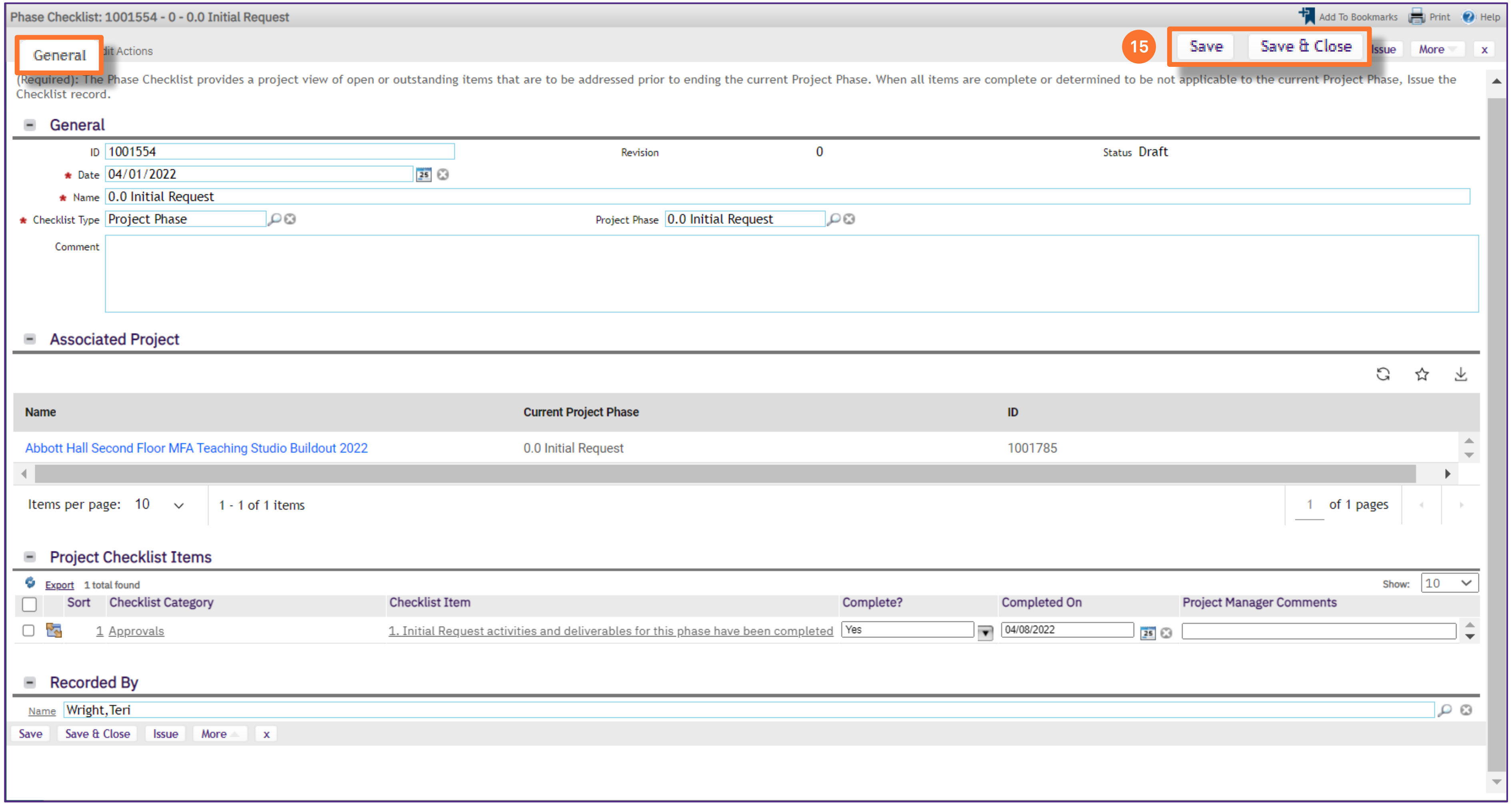
14) Optional: in the **Project Manager Comments** column, enter any brief comments of notations pertaining to the **Project Checklist Item**.

▶ IMPORTANT



▼ PROCESS

15) As you complete a **Project Phase Checklist**, use the **Save** and **Save & Close** buttons to save your progress.



▶ TIPS + TRICKS

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.**

▼ PROCESS

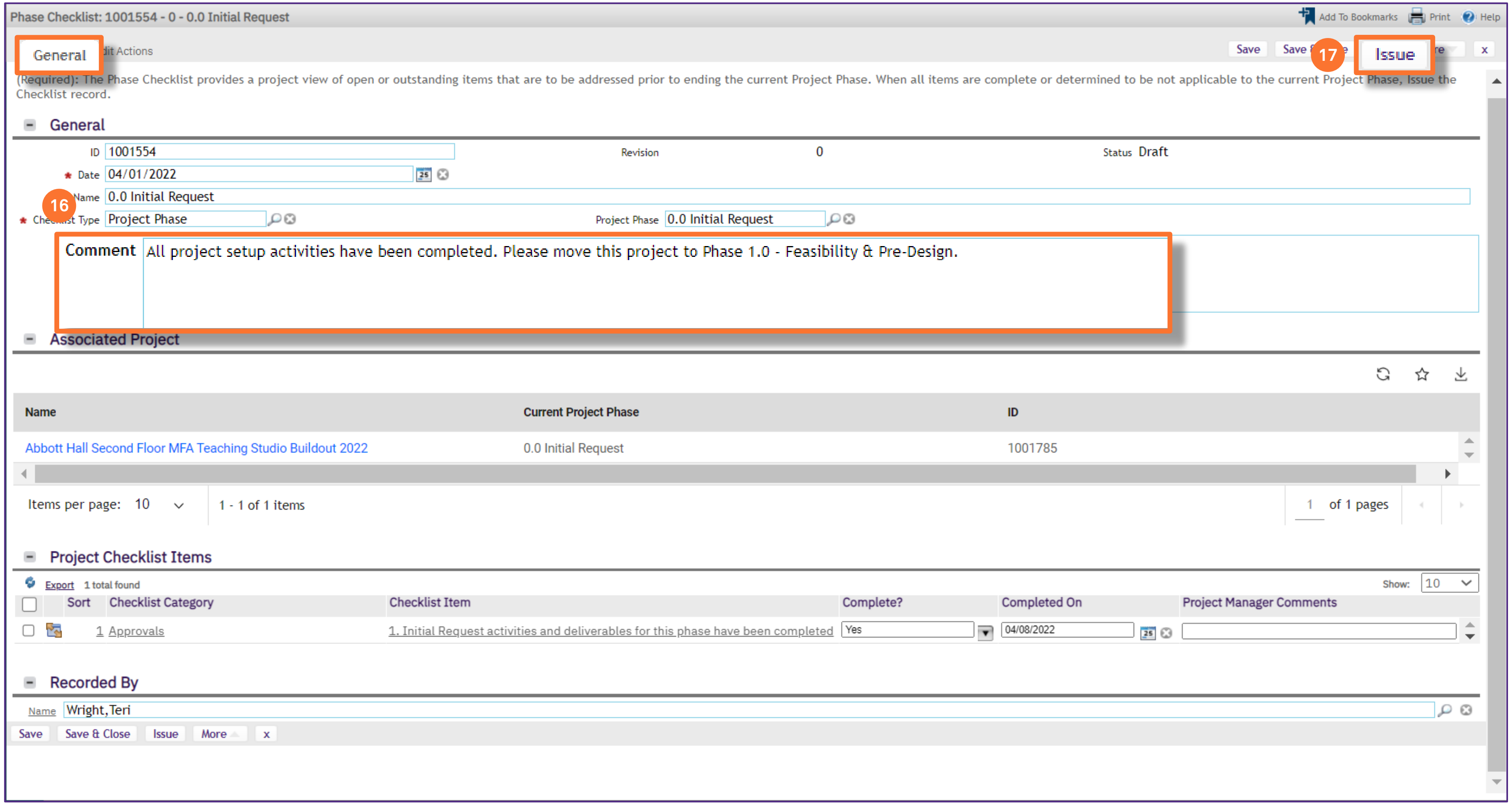
16) As you complete the **Project Phase Checklist** and prepare for submission, update the **Comment** field with a brief message to your **Project Director**. In this message, be sure to include the following:

   - **Callouts** – indicate any key / pertinent information that the Project Director should know regarding this phase of the project; this **Comment Box** will be the first thing he/she reviews upon receipt of your checklist.
   - **Desired Next Project Phase** – indicate a requested next phase for the project. As not all projects are alike in scope and/or process, some phases may not be applicable. Be sure to clearly state the phase for which you believe the project should be assigned next.

17) To submit your completed **Project Phase Checklist** to the **Project Director**, click on the **Issue** button.

The Project Phase Checklist has now been issued to the Project Director for their review and approval.

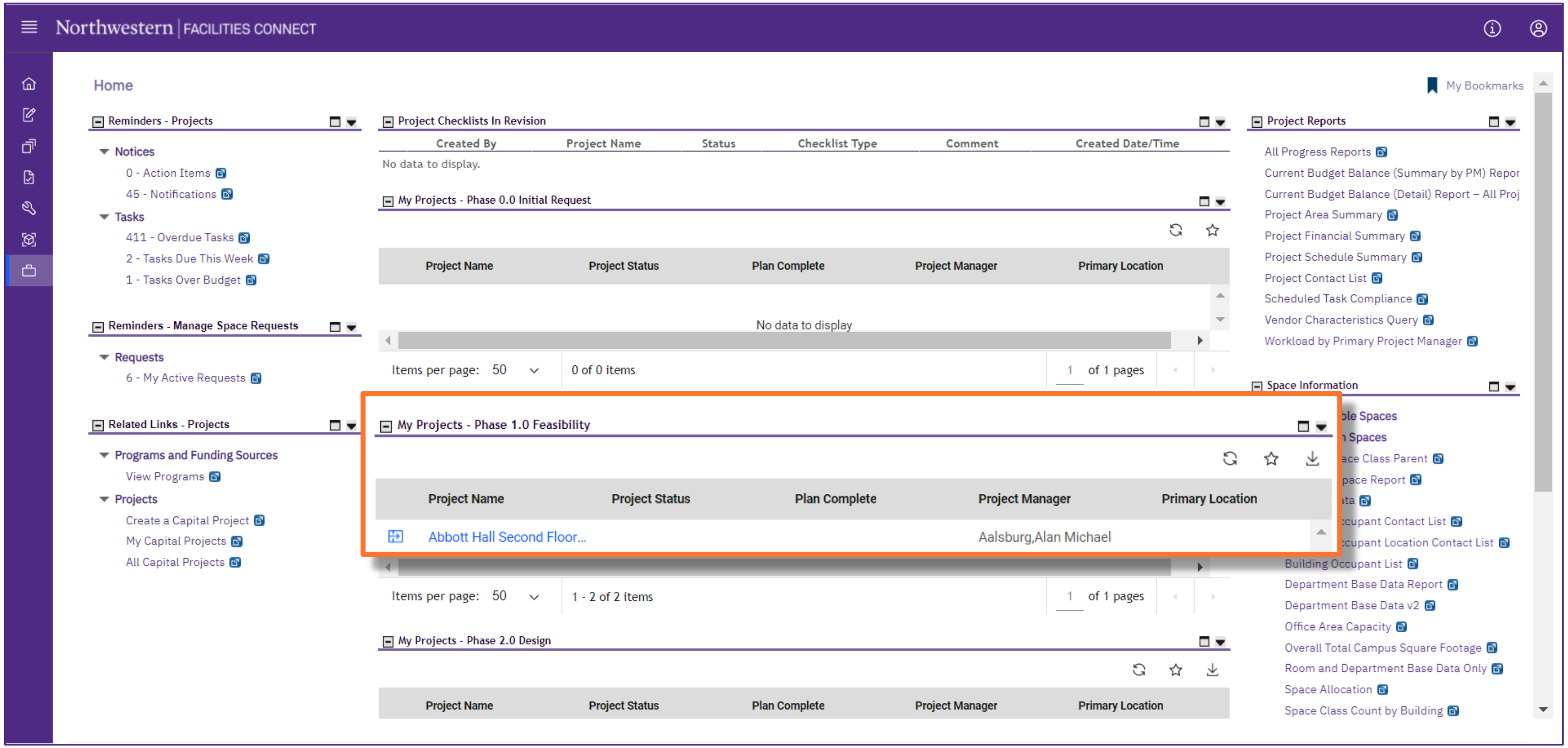
▶ IMPORTANT



▼ 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.

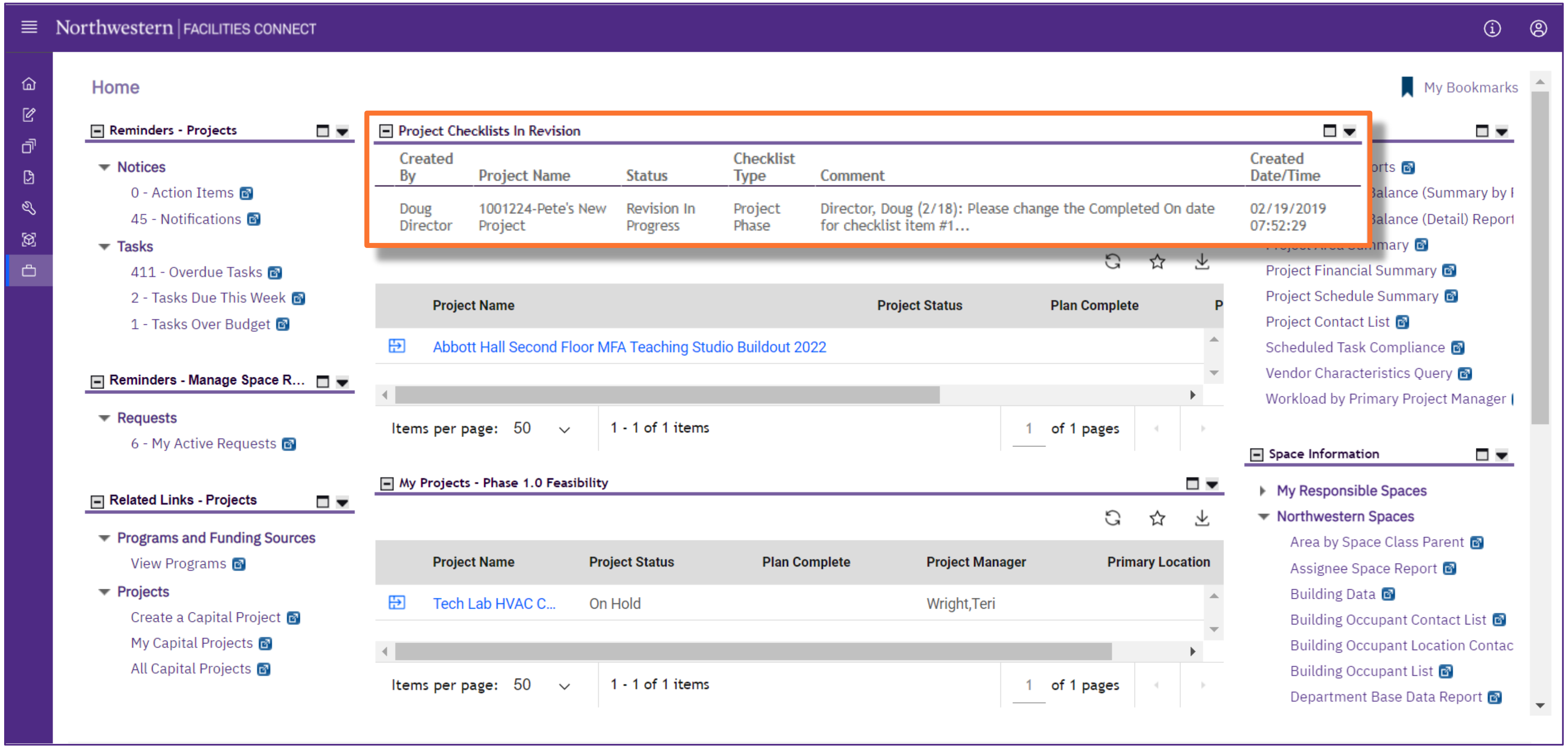


▶ IMPORTANT

▼ PROCESS

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

2. **Return for Revision** - the checklist appears in your **Project Checklists In Revision** portlet, indicating that the **Project Director** has a follow-up question and/or revision request for your checklist.



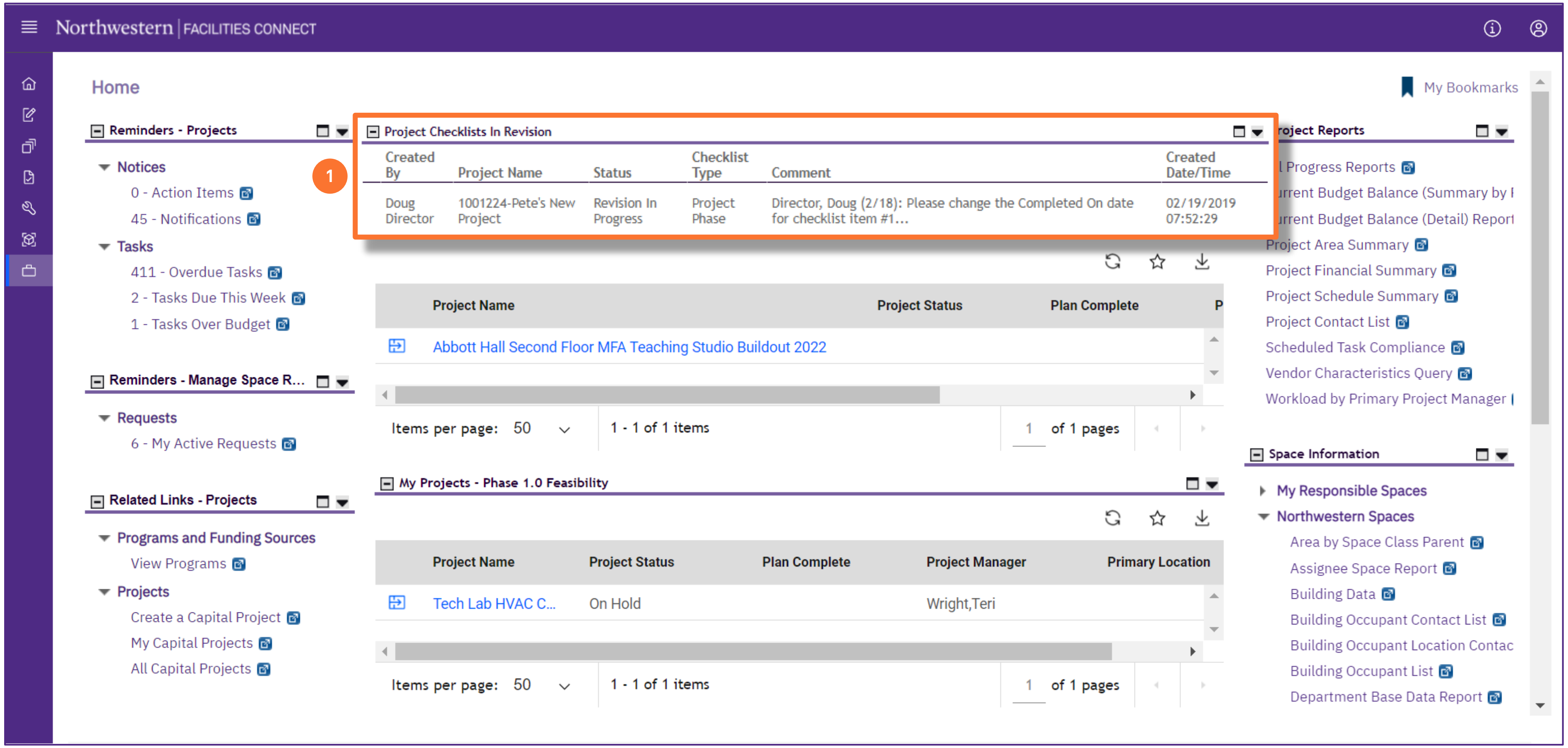
▶ IMPORTANT

▼ PROCESS

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>>*



▶ IMPORTANT

▼ 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.

▶ IMPORTANT