

PROJECT CONTACT QUICK ADD

Provides guidance for quickly adding or editing Contacts in the Capital Project Record in Facilities Connect.

roject Record	must be in the Revision in Progre s	s s status to add or edit Contacts.	
NS:			
om the Proj	ect Record,		
Clickon	the Contacts tab.		
Capital Project: 100178	5-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022		🙀 Add To Bookmarks 🛛 🖶 Print 💓 I
General Scope S	chedule Budget 1 me Contacts otes & Documents		Activate Calculate Save Save & Close More
(Required): Create a D	oject by entering general information about the project.		
	yeer by entering general mornation about the project.		
General			
	1001785 04/01/2022	Status Revision In Progress	
	Abbott Hall Second Floor MFA Teaching Studio Buildout 2022	23	
	Abbott Hall Second Floor MFA Teaching Studio Buildout 2022		
Droject Reporting Name	Abbete hatt second hoor mix reaching studio buildout 2022		
 Details 			nstruction
Details Project Type		Project Classification New Con	
 Details 		Project Classification New Cor Composition Project Phase 1.0 Feas	sibility & Pre-Design
Details Project Type Project Status Project Website	Active	Project Phase 1.0 Feas	
Details Project Type Project Status	Active		
Details Project Type Project Status Project Website Project Category	Active	Project Phase 1.0 Feas	

2

From the Contacts tab, scroll down to the Contact Rows.

Capital Project: 1001785-Abbott Hall Second	nd Floor MFA Teaching Studio Buildout 2022				Add To Bookma	ırks 븕 Print 🌘
General Scope Schedule Budget	Procurement Contacts Notes & Documents	6		Activate	Calculate Save & Save & Cle	se More
(Optional): Maintain a list of Contacts and 1	their roles for the Capital Project.					
- Crintrints	~~~~~	~~~~~	~~~~~	~~~~	Jid Die	or Renave
~h~h~h~h~h~h~h~h~h~h~h~h~h~h~h~h~h~h~h					~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~
 Contacts Description 						
	$\begin{array}{c c c c c c c c c c c c c c c c c c c $					
* Role	* Name	Organization	Work phone	Fax	Email	
Project Director	Type to search Required					•
Project Primary Manager	Type to search					•
						New row +

PROJECT MANAGEMENT



PROJECT CONTACT QUICK ADD

DIRECTIONS:

31



For the required Contacts, the Role field has been added by default.

^{3a} Click on the Name field.

Capital Project: 1001785-Abbott Hall Second Fl	oor MFA Teaching Studio Buildout 2022				Add To Bookmarks	🖶 Print 🕐	Help
General Scope Schedule Budget Pro	ocurement Contacts Notes & Documents			Activate Ca	Iculate Save & Close	More	x
For some roles, you can assign only one o	contact.						
* Role	* Name	Organization	Work phone	Fax	Email		
3a Project Director	Type to search Required					•	
Project Primary Manager	Type to search Required	_				•	
					Nev	w row 🛨	

Begin typing the name of the Contact you wish to add. The names will filter and narrow as you type.

Capital Project: 1001785-Abbott Hall Se	cond Floor MFA Teaching Studio Buildout 2022	2			📩 Add To Bookmarks 📄 Print 🔞 Help
General Scope Schedule Budge	et Procurement Contacts Notes & Docume	nts		Activate Calco	ulate Save & Close More 🔍 🗴
For some roles, you can assign onl	ly one contact.				•
* Role	* Name	Organization	Work phone	Fax	Email
Project Director	3b humphrey	×			•
Project Primary Manager	Gidd,Humphrey Theod				•
	Humphrey,Bonnie Lee, Capital Programs				New row 🕁
	Humphrey,Kelaiah Ade Northwestern				
	Humphrey,Laura L, No Humphrey,Samantha F Northwestern				

▼ IMPORTANT

The Contact must exist in Facilities Connect <u>BEFORE</u> adding it through the Quick Add function. If the desired Contact is External, create the **Contact Record** first, using the **Manage External Contacts** reference guide.

PROJECT MANAGEMENT



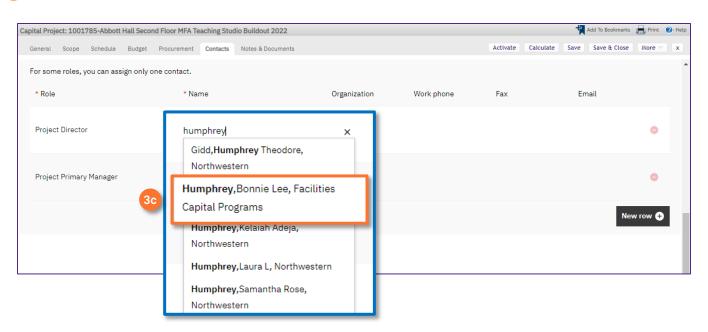
PROJECT CONTACT QUICK ADD

DIRECTIONS:

Continued. For the required Contacts, the Role field has been added by default.

3

Click on the **Name** of the Contact when it appears.



3d Repeat process for all additional required Contacts.

Capital Project: 1001785-Abbott Hall Second Flo	oor MFA Teaching Studio Buildout 2022						<u>ا</u> با	Add To Bookmarks	Print	🕐 Help
General Scope Schedule Budget Pro	curement Contacts Notes & Documents				Activate	Calculate	Save	Save & Close	More	x
For some roles, you can assign only one c	ontact.									•
* Role * Name Organization Work phone Fax Email										
Project Director	Humphrey,Bonnie Lee	×	Facilities Capital Programs	847/467-7864						
Project Primary Manager 3d	Type to search Required								•	
								Nev	w row 🕂	1



PROJECT CONTACT QUICK ADD

DIRECTIONS:



To add additional Roles,

4a Click on the New row button.

Capital Project: 1001785-Abbott Hall Second Flor	or MFA Teaching Studio Buildout 2022						<u>ا</u> لا	Add To Bookmarks	Print	🕐 Help
General Scope Schedule Budget Proc	urement Contacts Notes & Documents				Activate	Calculate	Save	Save & Close	More	x
For some roles, you can assign only one co	ntact.									•
* Role	* Name		Organization	Work phone	Fax		Em	ail		
Project Director	Humphrey,Bonnie Lee	×	Facilities Capital Programs	847/467-7864					•	
Project Primary Manager	Wright,Teri	×	Facilities Capital Programs	847/491-5271				_	0	
							4 a	New	row (>

^{4b} Click on the **Role drop down menu**.

Capital Proj	ect: 1001	.785-Abbott	Hall Secor	nd Floor MFA Te	aching Stu	dio Buildout 2022						<u>ا</u> با	Add To Bookmarks	Print	🕐 Help
General	Scope	Schedule	Budget	Procurement	Contacts	Notes & Documents				Activate	Calculate	Save	Save & Close	More	x
For som	e roles, y	you can ass	ign only o	one contact.											
* Role				* Na	me			Organization	Work phone	Fax		En	nail		
Projec	Project Primary Manager Wright,Teri						×	Facilities Capital Programs	847/491-5271					•	
Selec	t		~	4b Type	to search									•	
-													Net	w row 🕂	

Select the **Role** from the options. You can also type in the name of the role as well.

eneral Scope Schedule Budget Procurement Contacts Notes & Documents	Activate Calculate Save Save & Close More
Select Type to search	•
Designer/Planner	New row 🔶
Vendor Finance/Accounting	
Vendor Marketing/Sales	

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PROJECT MANAGEMENT



PROJECT CONTACT QUICK ADD

DIRECTIONS:

4d

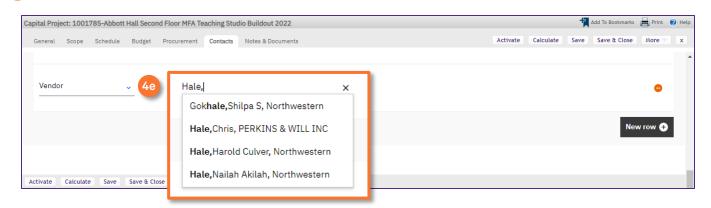
4

Continued. To add additional Roles,

Click on the **Name** field.

Capital Project: 1001785-Abbo	t Hall Second Floor	r MFA Teaching Stud	io Buildout 2022					Add To Bookmarks	Print	Help
General Scope Schedule	Budget Procur	rement Contacts	Notes & Documents			Activate	Calculate	Save Save & Close	More	x
For some roles, you can as	sign only one con	ntact.								1
* Role		* Name		Organizati	ion Work pho	ne Fax		Email		
Vendor	4 d	Type to search							•	ł
	F	Required								. 1
								Nev	w row +	

Begin typing the name of the Contact you wish to add. The names will filter and narrow as you type.



Click on the Name of the Contact when it appears.

Contacts reference guide.

Capital Project: 1001785-Abbott Hall Secon	nd Floor MFA Teaching Stu	idio Buildout 2022					ال ا	Add To Bookmarks	🖶 Print	🕐 Help
General Scope Schedule Budget	Procurement Contacts	Notes & Documents			Activate	Calculate	Save	Save & Close	More	x
Vendor4c		nilpa S, Northwestern	×					No	•	Î
Activate Calculate Save & Ch	Hale,Harol	, PERKINS & WILL INC d Culver, Northwestern h Akilah, Northwestern						Nev	N FOW €	
	ust exist in Fac			adding it through cord first, using t				n. If		



PROJECT CONTACT QUICK ADD

DIRECTIONS:

Once you have all the desired Contacts added,

5

Click on Save or Save & Close button to save the new Contacts.

Car	ital Proje	ct: 1001	785-Abbott	Hall Secon	d Floor MFA	Teaching Stu	dio Buildout 2022					bA 5	d To Bookmarks	📙 Print 👔 I
	General	Scope	Schedule	Budget	Procurement		Notes & Documer				Activate 5 ct		ve & Close	More
	For som	e roles, j	you can ass	ign only o	ne contact.									-
	* Role				* Na	ame			Organization	Work phone	Fax	Ema	il	
	Project	: Priman	y Manager		Wri	ght,Teri		×	Facilities Capital Programs	847/491-5271				•
	Project	Directo	r		Hur	nphrey,Bon	nie Lee	×	Facilities Capital Programs	847/467-7864				0
	Vendor	-		~	Hal	e,Chris		×	PERKINS & WILL INC					•
													Nev	v row 🕂
A	tivate	5 at	Save	Save &	Close e	x								

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