

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:

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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



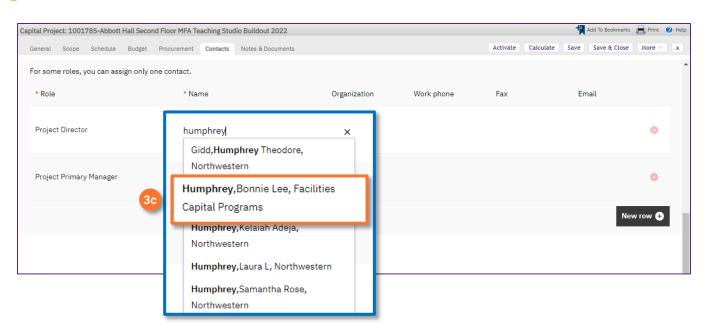
PROJECT CONTACT QUICK ADD

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

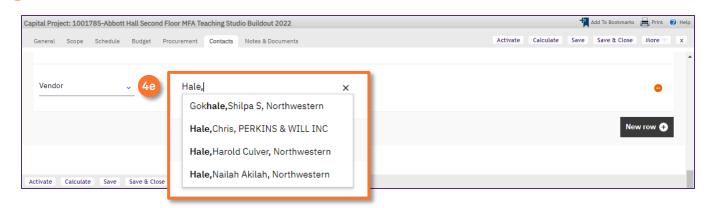
4

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,

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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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