PM MODULE
MANAGING EXTERNAL CONTACTS

MANAGING EXTERNAL CONTACTS

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for locating, creating, and modifying External Contact Records in Facilities Connect.

The purpose of this document is to serve as guided reference and/or new hire training on managing external contacts, available to all applicable users in Facilities Connect.

VERSION INFORMATION (THIS DOCUMENT)

Version	**1.1**	Release Date	**03/04/2022**
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.**		

REVISION HISTORY

Most Recent →

Version	Release Date	Action	Owner
1.1	03/04/2022	Updated	NU Facilities
1.0	02/13/2019	Created	NU Facilities
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▼ GETTING STARTED

❖ To begin, access the **Facilities Connect Home Screen.**

▶ **PROCESS**

▶ **IMPORTANT**

Northwestern | FACILITIES CONNECT

Home

	Home	
🏠	Home	
✏️	Requests	⌄
🗐	Projects	⌄
📄	Tasks	
🔧	Maintenance	⌄
⊡	Inventory	⌄
💼	Portfolio	

My Bookmarks

Reminders - Projects

▼ Notices
    0 - Action Items
    40 - Notifications

▼ Tasks
    385 - Overdue Tasks
    0 - Tasks Due This Week
    0 - Tasks Over Budget

Reminders - Manage Space ...

Related Links - Projects

▸ Programs and Funding Sources
▼ Projects
    Create a Capital Project
    My Capital Projects
    All Capital Projects

Project Checklists In Revision

Created By	Project Name	Status	Checklist Type	Comment	Created Date/Time
No data to display.					

My Projects - Phase 0.0 Initial Request

Project Name	Project Status	Plan Complete	Project Manager	Primary Locatio
Searle elev 4 com...	Active		Block,Daniel William	

Items per page: 50   1 - 1 of 1 items   1 of 1 pages

My Projects - Phase 1.0 Feasibility

Project Name	Project Status	Plan Complete	Project Manager	Primary Locatio
Tech Lab HVAC C...	On Hold		Wright,Teri	

Items per page: 50   1 - 1 of 1 items   1 of 1 pages

My Projects - Phase 2.0 Design

Project Name	Project Status	Plan Complete	Project Manager	Primary Locati

Project Reports

All Progress Reports
Current Budget Balance (Summary by
Current Budget Balance (Detail) Repo
Project Area Summary
Project Financial Summary
Project Schedule Summary
Project Contact List
Scheduled Task Compliance
Vendor Characteristics Query
Workload by Primary Project Manager

Space Information

▸ My Responsible Spaces
▼ Northwestern Spaces
    Area by Space Class Parent
    Assignee Space Report
    Building Data
    Building Occupant Contact List
    Building Occupant Location Conta
    Building Occupant List
    Department Base Data Report
    Department Base Data v2
    Office Area Capacity
    Overall Total Campus Square Foot
    Room and Department Base Data
    Space Allocation
    Space Class Count by Building

NOW VIEWING   HOME SCREEN (COMPANY FOCUS)

▼ PROCESS

1) From the left-hand Navigation menu, click on the **Portfolio** section.

*<<Upon clicking, the **Portfolio** screen will appear>>*

▶ IMPORTANT

Northwestern | FACILITIES CONNECT

Home

- Home
- Requests
- Projects
- Tasks
- Maintenance
- Inventory
- **Portfolio** ①

Home

My Bookmarks

Reminders - Projects

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- 0 - Action Items
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▼ Tasks
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Reminders - Manage Space ...

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- All Progress Reports
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Space Information
- ▶ My Responsible Spaces
- ▼ Northwestern Spaces
  - Area by Space Class Parent
  - Assignee Space Report
  - Building Data
  - Building Occupant Contact List
  - Building Occupant Location Conta
  - Building Occupant List
  - Department Base Data Report
  - Department Base Data v2
  - Office Area Capacity
  - Overall Total Campus Square Foot
  - Room and Department Base Data
  - Space Allocation
  - Space Class Count by Building
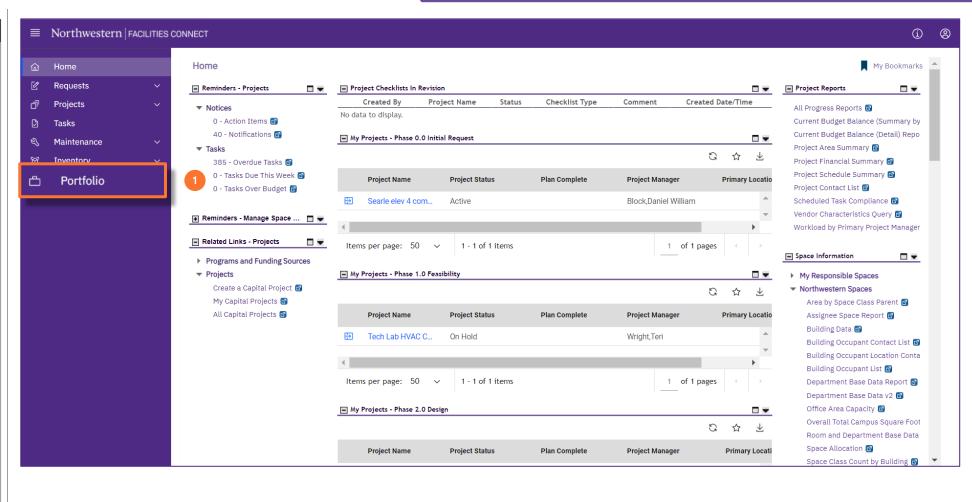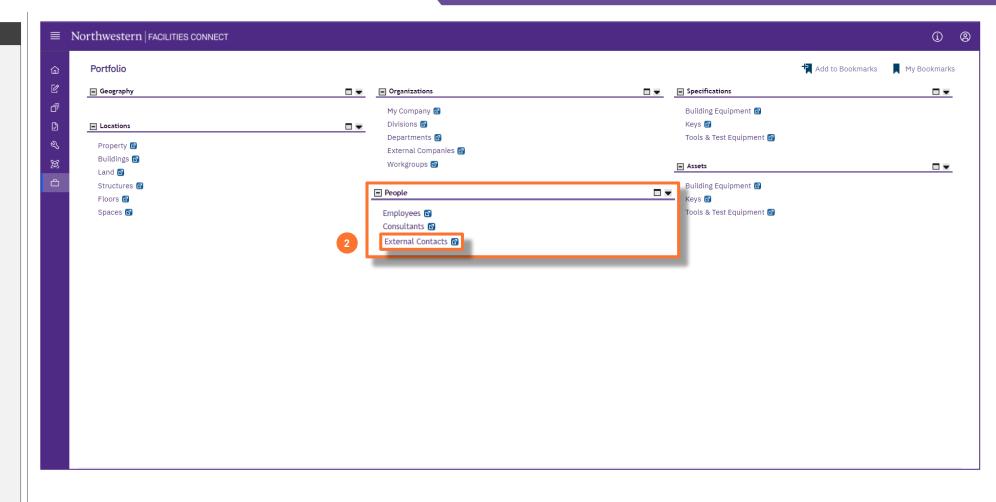
NOW VIEWING   PORTFOLIO (COMPANY FOCUS)

▼ PROCESS

2) From the **Portfolio** screen, locate the **People** portlet (center of the screen), and click on the **External Contacts** option.

<<Upon clicking, the External Contacts Screen will appear in the same window>>

▶ **IMPORTANT**

Northwestern | FACILITIES CONNECT

Portfolio

Add to Bookmarks   My Bookmarks

Geography

Locations
Property
Buildings
Land
Structures
Floors
Spaces

Organizations
My Company
Divisions
Departments
External Companies
Workgroups

People
Employees
Consultants
2 External Contacts

Specifications
Building Equipment
Keys
Tools & Test Equipment

Assets
Building Equipment
Keys
Tools & Test Equipment

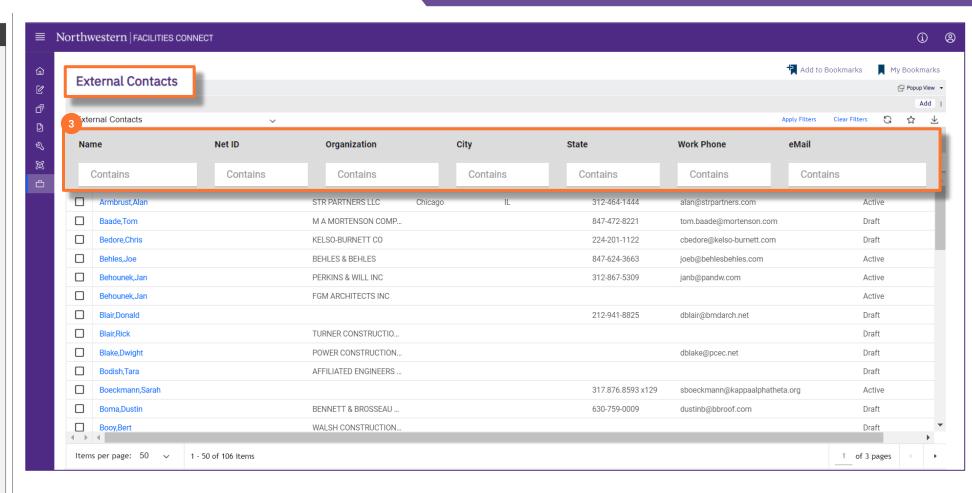**NOW VIEWING** | EXTERNAL CONTACTS SCREEN

▼ PROCESS

From the **External Contacts Screen**, you can take the following actions:

- **Search existing external contacts**
- **Modify an existing external contact**
- **Add a new external contact**

To **Search Existing External Contacts:**

3) Use available **Search Fields**, by entering search criteria in one or more boxes, then press **Enter** to search.

Northwestern | FACILITIES CONNECT

External Contacts

Add to Bookmarks   My Bookmarks

Popup View

Add

External Contacts   Apply Filters   Clear Filters

Name	Net ID	Organization	City	State	Work Phone	eMail	
Contains	Contains	Contains	Contains	Contains	Contains	Contains	
Armbrust,Alan		STR PARTNERS LLC	Chicago	IL	312-464-1444	alan@strpartners.com	Active
Baade,Tom		M A MORTENSON COMP...			847-472-8221	tom.baade@mortenson.com	Draft
Bedore,Chris		KELSO-BURNETT CO			224-201-1122	cbedore@kelso-burnett.com	Draft
Behles,Joe		BEHLES & BEHLES			847-624-3663	joeb@behlesbehles.com	Active
Behounek,Jan		PERKINS & WILL INC			312-867-5309	janb@pandw.com	Active
Behounek,Jan		FGM ARCHITECTS INC					Active
Blair,Donald					212-941-8825	dblair@bmdarch.net	Draft
Blair,Rick		TURNER CONSTRUCTIO...					Draft
Blake,Dwight		POWER CONSTRUCTION...				dblake@pcec.net	Draft
Bodish,Tara		AFFILIATED ENGINEERS ...					Draft
Boeckmann,Sarah					317.876.8593 x129	sboeckmann@kappaalphatheta.org	Active
Boma,Dustin		BENNETT & BROSSEAU ...			630-759-0009	dustinb@bbroof.com	Draft
Booy,Bert		WALSH CONSTRUCTION...					Draft

Items per page: 50   1 - 50 of 106 items   1   of 3 pages

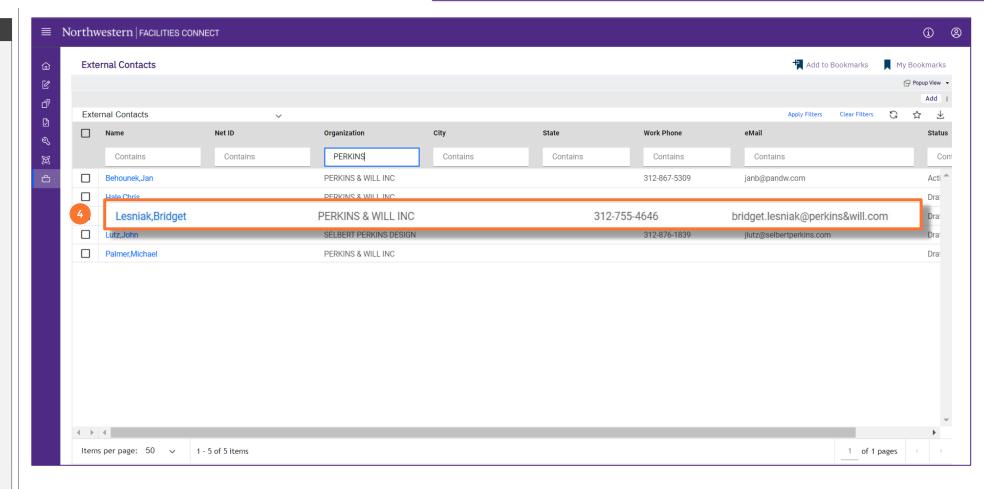## ▶ IMPORTANT

NOW VIEWING   EXTERNAL CONTACTS SCREEN

▼ PROCESS

To **Search Existing External Contacts** (cont.):

4) Once you have located a desired external contact, you may view their details by **clicking on external contact's name.**

*<<Upon clicking, the **External Contact Record** will open as a new window>>*

▶ IMPORTANT

NOW VIEWING EXTERNAL CONTACT RECORD
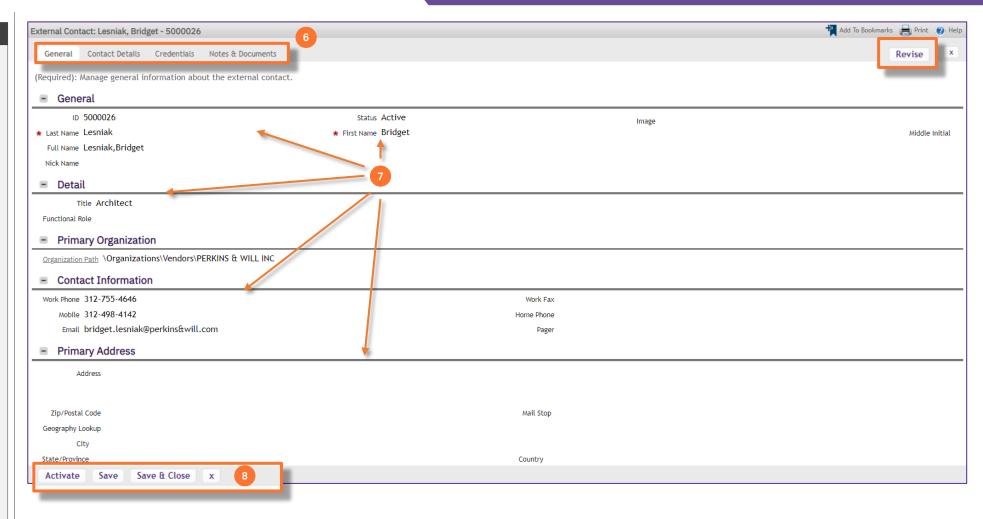
▼ PROCESS

Now that the **External Contact Record** is open, you are able to view and modify the contact details contained within.

To **Modify an Existing External Contact:**

5) Click the **Revise** button to being editing.

6) Use available **Navigation Tabs** To access and view all contact details contained in the **External Contact Record.**

7) Update contact information using the **Content Boxes** associated with available data fields.

Tip: As you update contact information, use the **Save button** (upper right) to save your work

8) When you have finished modifications to the **External Contact Record**, click on the Activate OR **Save & Close Button** to save all changes.

► IMPORTANT

External Contact: Lesniak, Bridget - 5000026

Add To Bookmarks   Print   Help

General   Contact Details   Credentials   Notes & Documents

Revise   x

(Required): Manage general information about the external contact.

General

ID 5000026 | Status Active | Image

★ Last Name Lesniak | ★ First Name Bridget | Middle Initial

Full Name Lesniak,Bridget

Nick Name

Detail

Title Architect

Functional Role

Primary Organization

Organization Path   \Organizations\Vendors\PERKINS & WILL INC

Contact Information

Work Phone 312-755-4646 | Work Fax

Mobile 312-498-4142 | Home Phone

Email bridget.lesniak@perkins&will.com | Pager

Primary Address

Address

Zip/Postal Code | Mail Stop

Geography Lookup

City

State/Province | Country

Activate   Save   Save & Close   x

▼ PROCESS

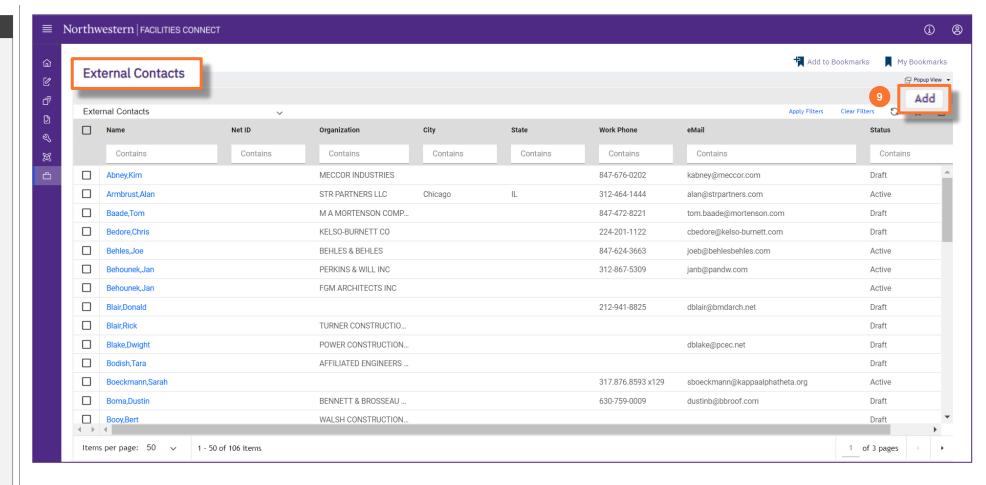To **Add a New External Contact:**

9) To add a new External Contact, click on the **Add** button (right side of the screen).

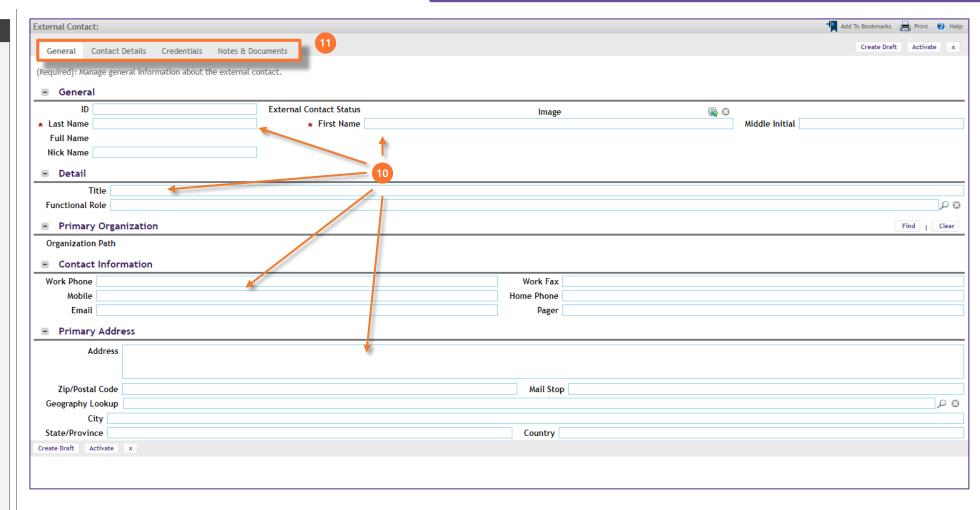*<<Upon clicking, a new **External Contact Record Form** will open as a new window>>*

▶ **IMPORTANT**

Northwestern | FACILITIES CONNECT

External Contacts

Add to Bookmarks   My Bookmarks

Popup View

External Contacts

Apply Filters   Clear Filters

9   Add

	Name	Net ID	Organization	City	State	Work Phone	eMail	Status
	Contains	Contains	Contains	Contains	Contains	Contains	Contains	Contains
☐	Abney,Kim		MECCOR INDUSTRIES			847-676-0202	kabney@meccor.com	Draft
☐	Armbrust,Alan		STR PARTNERS LLC	Chicago	IL	312-464-1444	alan@strpartners.com	Active
☐	Baade,Tom		M A MORTENSON COMP...			847-472-8221	tom.baade@mortenson.com	Draft
☐	Bedore,Chris		KELSO-BURNETT CO			224-201-1122	cbedore@kelso-burnett.com	Draft
☐	Behles,Joe		BEHLES & BEHLES			847-624-3663	joeb@behlesbehles.com	Active
☐	Behounek,Jan		PERKINS & WILL INC			312-867-5309	janb@pandw.com	Active
☐	Behounek,Jan		FGM ARCHITECTS INC					Active
☐	Blair,Donald					212-941-8825	dblair@bmdarch.net	Draft
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☐	Blake,Dwight		POWER CONSTRUCTION...				dblake@pcec.net	Draft
☐	Bodish,Tara		AFFILIATED ENGINEERS ...					Draft
☐	Boeckmann,Sarah					317.876.8593 x129	sboeckmann@kappaalphatheta.org	Active
☐	Boma,Dustin		BENNETT & BROSSEAU ...			630-759-0009	dustinb@bbroof.com	Draft
☐	Booy,Bert		WALSH CONSTRUCTION...					Draft

Items per page: 50   1 - 50 of 106 items   1 of 3 pages

NOW VIEWING EXTERNAL CONTACT RECORD

▼ PROCESS

To **Add a New External Contact** (cont.):

10) Add contact information using the **Content Boxes** associated with available data fields.

11) Use available **Navigation Tabs** to access and view all contact details contained in the **External Contact Record.**

▶ **IMPORTANT**

External Contact:

Add To Bookmarks   Print   Help

General   Contact Details   Credentials   Notes & Documents   ⑪

Create Draft   Activate   x

(Required): Manage general information about the external contact.

⊟ General

ID   External Contact Status   Image

★ Last Name   ★ First Name   Middle Initial

Full Name

Nick Name

⊟ Detail

Title

Functional Role

⊟ Primary Organization   Find | Clear

Organization Path

⊟ Contact Information

Work Phone   Work Fax

Mobile   Home Phone

Email   Pager

⊟ Primary Address

Address

Zip/Postal Code   Mail Stop

Geography Lookup

City

State/Province   Country

Create Draft   Activate   x

⑩

NOW VIEWING EXTERNAL CONTACT RECORD

To **Add a New External Contact** (cont.):

12) In the **Primary Organization** section, use the **Find** button **t**o associate the new external contact with their organization

   <<Available options will open in a new window>>

   Note: In order for an organization to appear in this list, the organization must have had at least one (1) historical purchase order (PO) with NU. If the external contact's organization is completely new and a PO has not yet been issued, the organization will not yet appear, and will need to be added to the external contact record at a later date.

13) Select the desired **Organization** by clicking the corresponding **Radio** button.

14) Then click **OK** to confirm the selection

15) Click **Create Draft** OR **Activate** to save.

▶ **IMPORTANT**

External Contact:

Add To Bookmarks   Print   Help

General   Contact Details   Credentials   Notes & Documents

(15)   Create Draft   Activate

(Required): Manage general information about the external contact.

General

ID

External Contact Status

Image

★ Last Name

★ First Name

Middle Initial

Full Name

Nick Name

Detail

Title

Functional Role

(12)

Primary Organization

Organization Path

(14)   OK ✓   Cancel ✕

Contact Information

External Companies

Apply Filters   Clear Filters

Work Phone

Mobile

Email

(13)   !   Name   ID   Type   NU Preferred Vendor   NU Prequalifie

Equals   PERKINS   Contains   Contains   Contains   Contains

Primary Address

○   MELANIE CARTER-P...   0000165907

○   MELISSA PERKINS   0000160520

Address

○   PERKINS & WILL INC   0000021941

○   PERKINS COIE LLP   0000168990

Zip/Postal Code

○   ROBERT R PERKINS...   0000163565

Geography Lookup

○   SELBERT PERKINS ...   0000086352

City

○   SUSAN PERKINS   0000197784

State/Province

○   TEMIKA MONIQUE ...   0000223284

Create Draft   Activate   x

○   TERRY PERKINS   0000172034

○   WILL PERKINS   0000216093

Items per page: 50   1 - 20 of 20 items   1 of 1 pages

Find