PROJECT CONTACT QUICK ADD

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

▼ **GETTING STARTED**

The Project Record must be in the **Revision in Progress** status to add or edit Contacts.

DIRECTIONS:

1 From the **Project Record,**

1 Click on the **Contacts** tab.

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

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DIRECTIONS:

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

3a Click on the Name field.

3b Begin typing the name of the Contact you wish to add. The names will filter and narrow as you type.

▼ 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.

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DIRECTIONS:

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

3c Click on the **Name** of the Contact when it appears.

Capital Project: 1001785-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022 — Add To Bookmarks — Print — Help

General Scope Schedule Budget Procurement **Contacts** Notes & Documents   Activate | Calculate | Save | Save & Close | More | x

For some roles, you can assign only one contact.

* Role	* Name	Organization	Work phone	Fax	Email
Project Director	humphrey ✕				
Project Primary Manager					

Gidd,**Humphrey** Theodore, Northwestern

Humphrey,Bonnie Lee, Facilities Capital Programs

Humphrey,Kelaiah Adeja, Northwestern

Humphrey,Laura L, Northwestern

Humphrey,Samantha Rose, Northwestern

New row ⊕

3d Repeat process for all additional required Contacts.

Capital Project: 1001785-Abbott Hall Second Floor MFA Teaching Studio Buildout 2022 — Add To Bookmarks — Print — Help

General Scope Schedule Budget Procurement **Contacts** Notes & Documents   Activate | Calculate | Save | Save & Close | More | x

For some roles, you can assign only one contact.

* Role	* Name	Organization	Work phone	Fax	Email
Project Director	Humphrey,Bonnie Lee ✕	Facilities Capital Programs	847/467-7864		
Project Primary Manager	Type to search Required				

New row ⊕

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DIRECTIONS:

4 To add additional Roles,

4a Click on the **New row** button.

4b Click on the **Role drop down menu**.

4c Select the **Role** from the options. *You can also type in the name of the role as well.*

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DIRECTIONS:

4 *Continued.* To add additional Roles,

4d Click on the **Name** field.

4e Begin typing the name of the Contact you wish to add. The names will filter and narrow as you type.

4c Click on the **Name** of the Contact when it appears.

▼ 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.

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DIRECTIONS:

5 Once you have all the desired Contacts added,

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