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)

<table>
<thead>
<tr>
<th>Version</th>
<th>Release Date</th>
<th>Action</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>03/04/2022</td>
<td>Updated</td>
<td>NU Facilities</td>
</tr>
<tr>
<td>1.0</td>
<td>02/13/2019</td>
<td>Created</td>
<td>NU Facilities</td>
</tr>
<tr>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>

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
To begin, access the Facilities Connect Home Screen.
1) From the left-hand Navigation menu, click on the Portfolio section.

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

© 2022 Northwestern University
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>>
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.

**IMPORTANT**

- Use available **Search Fields**, by entering search criteria in one or more boxes, then press **Enter** to search.
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>>
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 begin 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.
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>>
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.
To Add a New External Contact (cont.):

12) In the Primary Organization section, use the Find button to associate the new external contact with their organization.

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.