

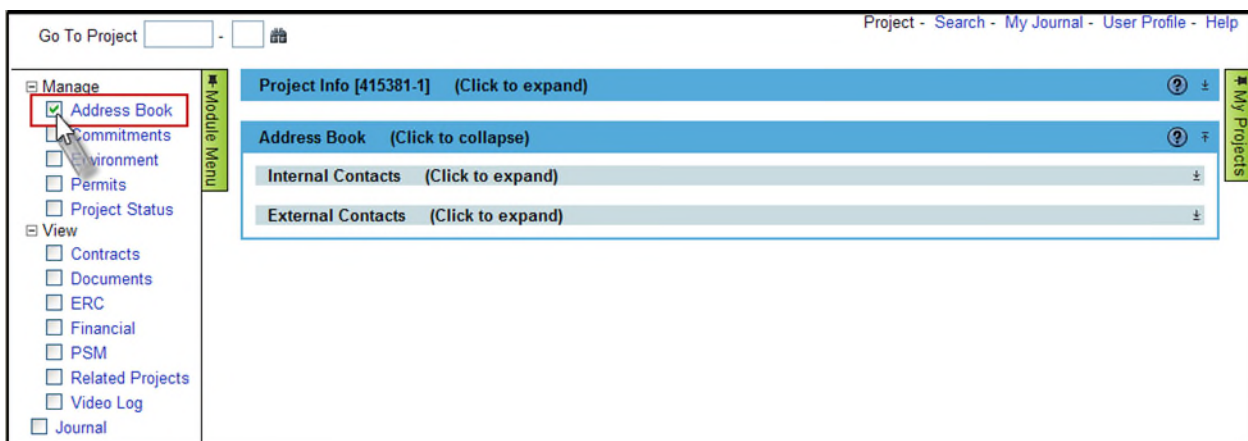
The Address Book Module

The Address Book Module allows you to add contact information about people or organizations that are involved with a Project. There are two types of contacts defined in the Address Book:

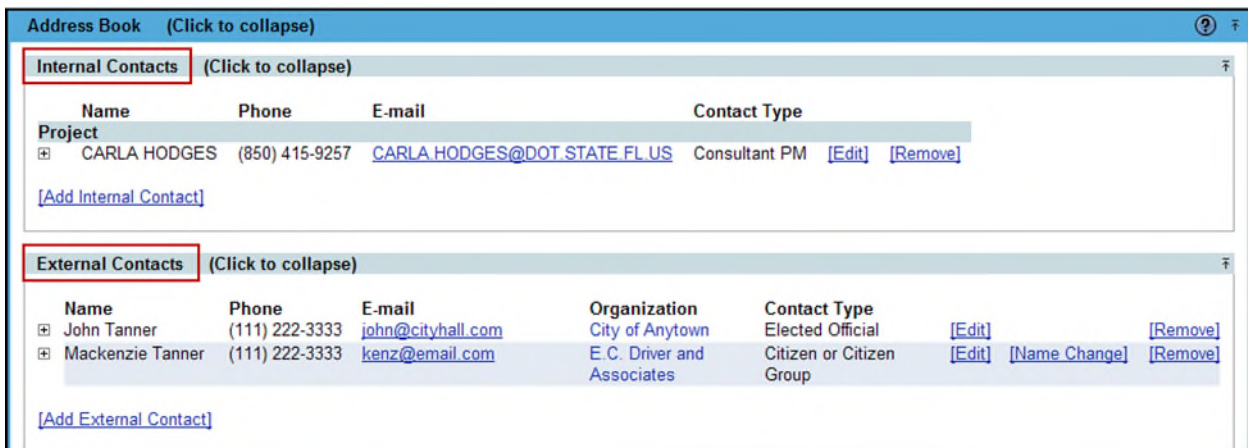
- **Internal Contacts** are staff that work for FDOT.
- **External Contacts** are non-FDOT staff or organizations.

To view the Address Book Module

1. Select the Address Book Module from the Module Menu.



2. Click on the Internal Contacts and External Contacts header to see the Contacts already assigned to the Project.



You must have been granted privilege to the Address Book module to complete the items that will be described below. If you do not have access, and feel you should, contact your PSEE District Administrator. They are listed in the footer of every PSEE page.

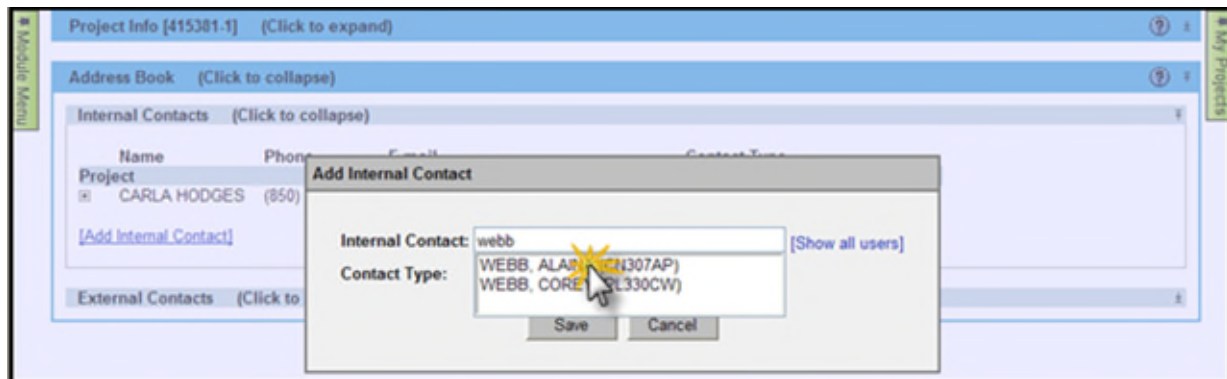
Creating an Internal Contact

Internal Contacts are staff that work with FDOT. Because PSEE already has information related to these Contacts, you will only have to select the contacts and their contact type. You do not have to type in any of their details.

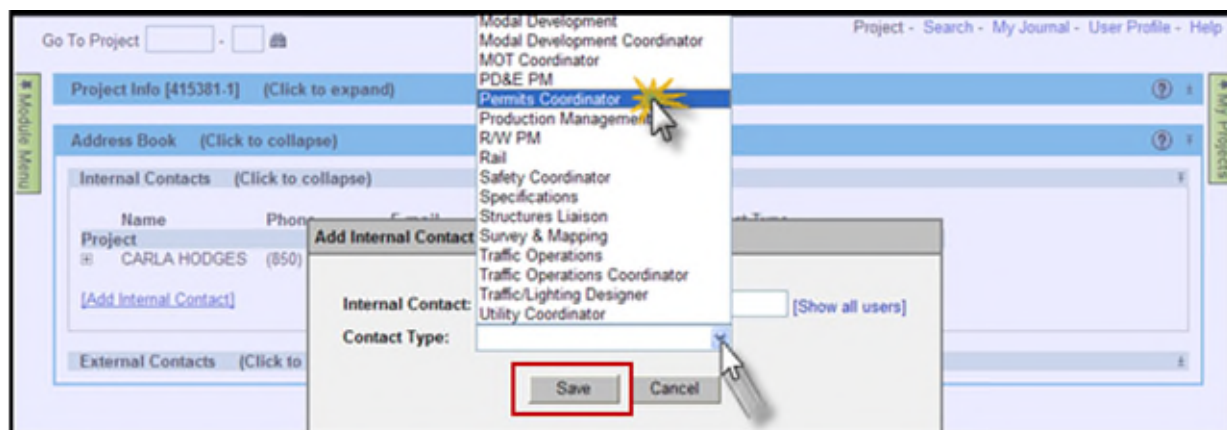
1. Select **Add Internal Contact** to add an Internal Contact for the Project.



2. A new window appears that will allow you to search for the name of the Internal Contact. Begin typing the first or last name of the Internal Contact. A list of potential matches appears. Select the correct person. **Note:** Your list is limited to only those staff in your District. To receive results for all Districts select the **[Show all users]** link.



3. Select the appropriate **Contact Type** for the person and select the **Save** button to save your contact.



4. The selected Contact displays in the list.

Address Book (Click to collapse)				
Internal Contacts (Click to collapse)				
	Name	Phone	E-mail	Contact Type
Project				
<input type="checkbox"/>	ALAINA WEBB	(850) 415-9447	ALAINA.WEBB@DOT.STATE.FL.US	Permits Coordinator [Edit] [Remove]
<input type="checkbox"/>	CARLA HODGES	(850) 415-9257	CARLA.HODGES@DOT.STATE.FL.US	Consultant PM [Edit] [Remove]
[Add Internal Contact]				

Note: The phone number displayed is from enterprise systems such as Active Directory (Consultants) and PeopleFirst (Career Service/SES/SMS). If a phone number is incorrect that person can visit [Employee Search](#) on FDOT’s Enterprise Information Portal. They should search for themselves, and then follow the screen directions to request an update of their information.

5. To view the full details of an Internal Contact click the plus box to the left of their name.

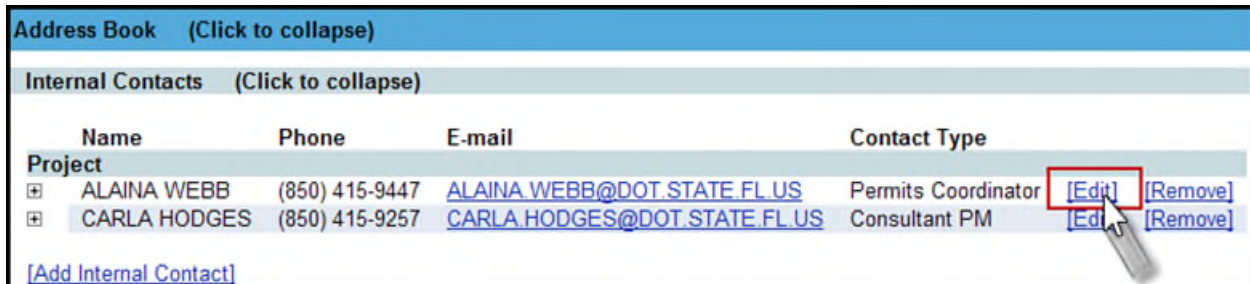
Address Book (Click to collapse)				
Internal Contacts (Click to collapse)				
	Name	Phone	E-mail	Contact Type
Project				
<input type="checkbox"/>	ALAINA WEBB	(850) 415-9447	ALAINA.WEBB@DOT.STATE.FL.US	Permits Coordinator [Edit] [Remove]
<input type="checkbox"/>	CARLA HODGES	(850) 415-9257	CARLA.HODGES@DOT.STATE.FL.US	Consultant PM [Edit] [Remove]
[Add Internal Contact]				

6. Displays the details of the Internal Contact.

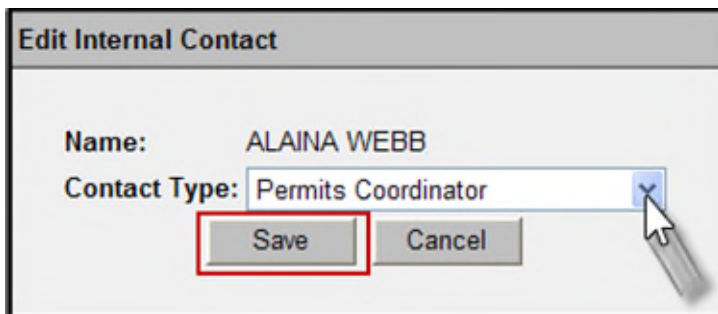
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<table border="1"> <tr> <td>Position:</td> <td>PROJECT MANAGER</td> <td>ID:</td> <td>CN307AP</td> </tr> <tr> <td>Office:</td> <td>ROADWAY DESIGN</td> <td>Phone:</td> <td>(850) 415-9447</td> </tr> <tr> <td>Building:</td> <td>DESIGN</td> <td>Fax:</td> <td>(850) 415-9148</td> </tr> <tr> <td>CLSF Family:</td> <td colspan="3">ARCHITECT, SURVEY, CARTOGRAPH & ENGINEER</td> </tr> <tr> <td>CLSF Occupation:</td> <td colspan="3">ENGINEERING, ALL OTHER</td> </tr> <tr> <td>Staff Type:</td> <td>CAREER SERVICE</td> <td>District:</td> <td>District 3</td> </tr> </table>					Position:	PROJECT MANAGER	ID:	CN307AP	Office:	ROADWAY DESIGN	Phone:	(850) 415-9447	Building:	DESIGN	Fax:	(850) 415-9148	CLSF Family:	ARCHITECT, SURVEY, CARTOGRAPH & ENGINEER			CLSF Occupation:	ENGINEERING, ALL OTHER			Staff Type:	CAREER SERVICE	District:	District 3
Position:	PROJECT MANAGER	ID:	CN307AP																									
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<input type="checkbox"/>	CARLA HODGES	(850) 415-9257	CARLA.HODGES@DOT.STATE.FL.US	Consultant PM [Edit] [Remove]																								

Editing an Internal Contact

You may change the contact type of an Internal Contact. Select the **Edit** link.



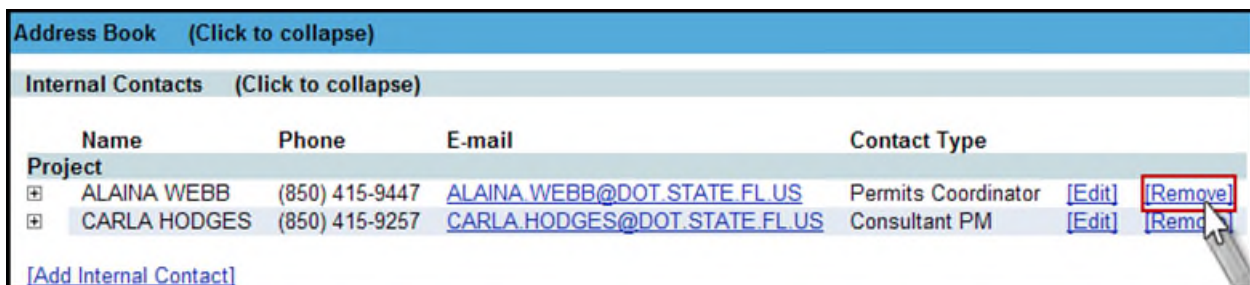
From the Contact Type drop down, select a required contact type and select the **Save** button



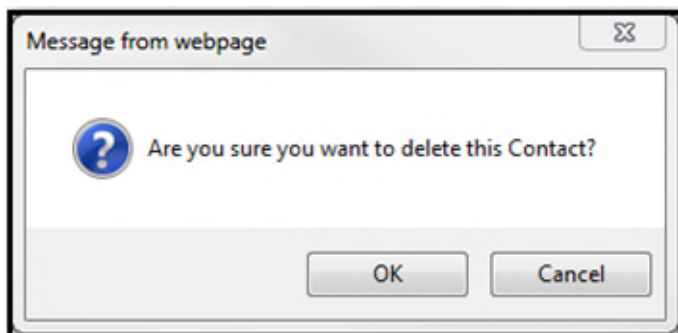
Removing an Internal Contact

You may remove an internal contact from your Project.

1. Click the Remove hyperlink to the right of the internal contact you want to remove.



2. The contact is removed from the Project after you confirm that you want to delete by selecting OK.



Creating an External Contact

When creating an External Contact you will need to provide the detailed information for this contact.

1. Select **Add External Contact** to add an External Contact for the Project.



2. A new window appears. Begin typing the first and/or last name of the contact. If this contact has been previously used in PSEE a list of potential matches will appear.
 - a. If your contact is on this list, select their name from the drop down. The information previously entered about them will appear.
 - b. If your contact is not on the list, continue typing their full name and then proceed with filling out the information.
3. You may complete/update the information for your contact. You are required to provide the name plus at least one form of communication for the contact (phone, email address, mail address).

The "Add External Contact" form contains the following fields and values:

- Name: Todd Tanner
- Title: Mayor
- Address Line 1: 123 Mayor's Drive
- Address Line 2: (empty)
- City: Turtle Grove
- State: FLORIDA (dropdown menu)
- Zip: 33333- (with separate Ext. field)
- Primary Phone Number: (555) 555-5555 (with separate Ext. field)
- Mobile Phone Number: (555) 111-2222 (with separate Ext. field)
- Fax Number: (empty) (with separate Ext. field)
- Email Address: todd@imthemayor.com
- Website Address: (empty)
- Comment: (empty)
- Organization: (empty) with a "Clear" button
- Contact Type: (dropdown menu)

At the bottom of the form are "Save" and "Cancel" buttons.

- 4. The **Organization** (optional) is the Business, Governmental Agency or Group this contact may be associated with. Begin typing the name and previously entered information will appear. If the organization has already been entered, select it from the list. If not, continue adding information about the Organization.

The screenshot shows a form titled "Organization:". The "Organization" field contains "City of Turtle Grove" and a "Clear" button. Below this, a message states "This organization will be created as a new contact." The form includes several input fields: "Address Line 1:", "Address Line 2:", "City:", "State:" (a dropdown menu), "Zip:", "Primary Phone Number:", "Ext.:", and "Email Address:".

- 5. Select a **Contact Type** to describe this external contact and Select **Save** to save your contact. Your contact now displays on the list.

The screenshot shows the "Add External Contact" form. The "Contact Type" dropdown menu is open, displaying a list of options: "Citizen or Citizen Group", "City Employee", "Consultant", "County Employee", "Elected Official", "Governmental Agency", "Legal Representative", "Media", and "Utility Representative". A mouse cursor is pointing at "City Employee". The "Save" button is highlighted with a red box. Other fields in the form include "Name: Todd Tanner", "Title: Mayor", "Address Line 1: 123 Mayor's Drive", "City: Turtle Grove", "State: FLORIDA", "Zip: 33333", "Primary Phone Number: (555) 555-5555", and "Mobile Phone Number: (555) 111-2222".

Using the External Contact List

1. You may click on the hyperlinked Organization name of any contact to see a complete listing of all other people associated with that Organization.

The screenshot shows a table of external contacts. A red box highlights the organizational chart for 'E.C. Driver and Associates' which is displayed over the table. The chart lists the following contacts:

Name	Phone	E-mail
E.C. Driver and Associates	(850) 893-6148	
John Metroka	(813) 282-9886	John_Metroka@ecdriver.com
Don Padgett	(850) 893-6148	
Mackenzie Tanner	(111) 222-3333	kenz@email.com

2. To look at the full details of an External Contact click the plus box to the left of their name.

The screenshot shows the same table of external contacts. A yellow highlight is placed over the plus icon to the left of the name 'Todd Tanner'.

3. If this external contact is associated with other Projects in PSEE, there will be a note at the bottom of the screen. Click the **See Projects** link to see the other Projects.

The screenshot shows the details for Todd Tanner expanded. A red box highlights the following information:

Title: Mayor
Address: 123 Mayor's Drive
 Turtle Grove, FLORIDA 33333
Primary Phone: (555) 555-5555 Ext:
Mobile: (555) 111-2222
Fax: Ext:
Website Address:
Comment:
 7 Projects use this Contact [\[See Projects\]](#)

Displays the list of other projects the external contact is associated with in PSEE.

☐ Todd Tanner (555) 555-5555 todd@imthemayor.com City of Turtle Grove City Employee [\[Edit\]](#) [\[Name Change\]](#) [\[Remove\]](#)

Title: Mayor
Address: 123 Mayor's Drive
 Turtle Grove, FLORIDA 33333
Website Address:
Comment:

Primary Phone: (555) 555-5555 Ext:
Mobile: (555) 111-2222
Fax: Ext:

7 Projects use this Contact [\[Hide Projects\]](#)

Project	Project Manager	District
217968-1	APRIL BLACKBURN	District 3
251670-1		District 6
415381-1	RYAN PATTERSON	District 3
424106-1	GARRETT MARTIN	District 3
413481-1	TOMMY JOHNS	District 3
419305-1	RYAN PATTERSON	District 3
421638-1	RYAN PATTERSON	District 3

4. Click **Hide Projects** to close the Project List.

☐ Todd Tanner (555) 555-5555 todd@imthemayor.com City of Turtle Grove City Employee [\[Edit\]](#) [\[Name Change\]](#) [\[Remove\]](#)

Title: Mayor
Address: 123 Mayor's Drive
 Turtle Grove, FLORIDA 33333
Website Address:
Comment:

Primary Phone: (555) 555-5555 Ext:
Mobile: (555) 111-2222
Fax: Ext:

7 Projects use this Contact [\[Hide Projects\]](#)

Project	Project Manager	District
217968-1	APRIL BLACKBURN	District 3

5. Click the box with minus sign to no longer see the details for the external contact.

☐ Todd Tanner (555) 555-5555 todd@imthemayor.com City of Turtle Grove City Employee [\[Edit\]](#) [\[Name Change\]](#) [\[Remove\]](#)

Title: Mayor
Address: 123 Mayor's Drive
 Turtle Grove, FLORIDA 33333
Website Address:
Comment:

Primary Phone: (555) 555-5555 Ext:
Mobile: (555) 111-2222
Fax: Ext:

7 Projects use this Contact [\[Hide Projects\]](#)

Project	Project Manager	District
217968-1	APRIL BLACKBURN	District 3

Editing an External Contact

You may change the details of any contact associated with your project. Keep in mind this contact information is shared. If you change a phone number on a contact that is used in other Projects, they will see that a phone number change has occurred.

1. Select **Edit** to the right of the external contact you need to edit.

External Contacts (Click to collapse)						
Name	Phone	E-mail	Organization	Contact Type		
Project						
<input type="checkbox"/> John Tanner	(111) 222-3333	john@cityhall.com	City of Anytown	Elected Official	[Edit]	[Remove]
<input type="checkbox"/> Mackenzie Tanner	(111) 222-3333	kenz@email.com	E. C. Driver and Associates	Citizen or Citizen Group	[Edit]	[Name Change] [Remove]
<input type="checkbox"/> Todd Tanner	(555) 555-5555	todd@imthemayor.com	City of Turtle Grove	City Employee	[Edit]	[Name Change] [Remove]
[Add External Contact]						

2. The Edit Contact window appears. Make the needed changes and select **Save** to save your changes.
3. A Journal Entry was made to document when and where a change occurred to the details on an external contact for the Project. The Journal Entry documents the before and after values. In addition, this Journal Entry was added to the Journal for any other Projects that use this external contact.

Journal Module (Click to collapse)

Detail Level: All Summary Only

Journal Entry Type: All System Generated User Generated

Business Module: Address Book

Created By: [Clear](#)

Created	Created By	Module
2/17/2011 3:55 PM	SYSTEM RYAN PATTERSON	Address Book

Activity: Edit External Contact By: RYAN PATTERSON (RD352RP)

External Contact [Before]

Name: Todd Tanner
 Title: Mayor
 Address Line 1: 123 Mayor's Drive
 Address Line 2: Suite # 163
 City: Turtle Grove
 State: FLORIDA
 Zip: 33333
 Primary Phone Number: (555)555-5555
 Primary Phone Number Extension:
 Mobile Phone Number: (555)111-2222
 Fax Number: (555)342-2314
 Fax Number Extension: 3430
 Email Address: todd@imthemayor.com
 Website Address: www.pcbeach.com
 Comment:
 Organization: City of Turtle Grove
 Contact Type: City Employee

External Contact [After]

Website Address: www.sunshine.com
 Contact Type: County Employee

** Project List Ommitted **

- Any PSEE user that has chosen to be notified of changes to external contacts for this Project will also receive an email notification with the same details listed in the Journal entry.

From: FDOT-PSEE-System@dot.state.fl.us
 To:
 Cc:
 Subject: [TEST] PSEE: Project: 415381-1 Activity: Edit External Contact By: RYAN PATTERSON (RD352RP)

External Contact [Before]

Name: Todd Tanner
Title: Mayor
Address Line 1: 123 Mayor's Drive
Address Line 2: Suite # 163
City: Turtle Grove
State: FLORIDA
Zip: 33333
Primary Phone Number: (555)555-5555
Primary Phone Number Extension:
Mobile Phone Number: (555)111-2222
Fax Number: (555)342-2314
Fax Number Extension: 3430
Email Address: todd@imthemayor.com
Website Address: www.pcbeach.com
Comment:
Organization: City of Turtle Grove
Contact Type: City Employee

External Contact [After]

Website Address: www.sunshine.com
Contact Type: County Employee

Associated Projects:
[217968-1](#) [District 3]
[251670-1](#) [District 6]
[424106-1](#) [District 3]
[415381-1](#) [District 3]
[413481-1](#) [District 3]
[419305-1](#) [District 3]
[421638-1](#) [District 3]

Removing an External Contact

You may remove an external contact from your Project.

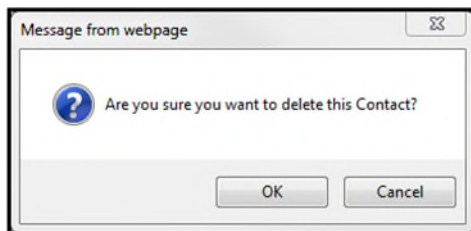
- Click the Remove hyperlink to the right of the external contact you want to remove.

External Contacts (Click to collapse)

Name	Phone	E-mail	Organization	Contact Type		
Project						
<input type="checkbox"/> John Tanner	(111) 222-3333	john@cityhall.com	City of Anytown	Elected Official	[Edit]	[Remove]
<input type="checkbox"/> Mackenzie Tanner	(111) 222-3333	kenz@email.com	E. C. Driver and Associates	Citizen or Citizen Group	[Edit] [Name Change]	[Remove]
<input type="checkbox"/> Todd Tanner	(555) 555-5555	todd@imthemayor.com	City of Turtle Grove	City Employee	[Edit] [Name Change]	[Remove]

[\[Add External Contact\]](#)

- The contact is removed from the Project after you confirm that you want to delete by selecting OK.



Changing a Name on an External Contact

While name changes do occur, they are less likely to happen than changes to the other details about an external contact. Because the name is so important, PSEE takes steps to ensure name changes are handled correctly.

Name	Phone	E-mail	Organization	Contact Type		
Project						
John Tanner	(111) 222-3333	john@cityhall.com	City of Anytown	Elected Official	[Edit]	[Remove]
Mackenzie Tanner	(111) 222-3333	kenz@email.com	E. C. Driver and Associates	Citizen or Citizen Group	[Edit]	[Name Change] [Remove]
Todd Tanner	(555) 555-5555	todd@imthemayor.com	City of Turtle Grove	City Employee	[Edit]	[Name Change] [Remove]

[\[Add External Contact\]](#)

- If you have the **Edit** hyperlink, and not the Name Change hyperlink, you have access to change the name. Simply click Edit and change the name.
- If you have the **Edit** hyperlink, and the **Name Change** hyperlink, you will have to request someone else approve and complete the name change.
- If you do not have the **Edit** hyperlink OR the **Name Change** hyperlink, you do not have access to work within the Address Book. Talk to your PSEE District Administrator (listed in the footer of each PSEE page) if you need this access.

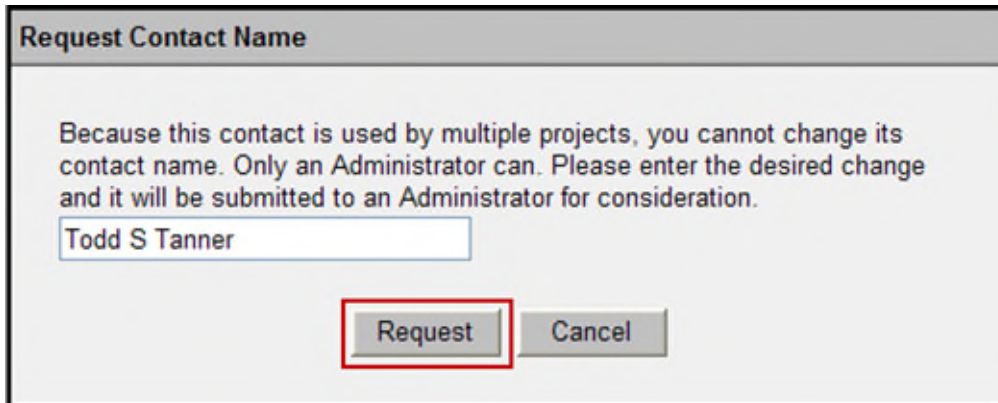
Requesting a Name Change

1. Select the Name Change hyperlink that is listed to the right of the external contact.

Name	Phone	E-mail	Organization	Contact Type		
Project						
John Tanner	(111) 222-3333	john@cityhall.com	City of Anytown	Elected Official	[Edit]	[Remove]
Mackenzie Tanner	(111) 222-3333	kenz@email.com	E. C. Driver and Associates	Citizen or Citizen Group	[Edit]	[Name Change] [Remove]
Todd Tanner	(555) 555-5555	todd@imthemayor.com	City of Turtle Grove	City Employee	[Edit]	[Name Change] [Remove]

[\[Add External Contact\]](#)

2. A new window appears explaining that an Administrator will have to make this change. Enter the name change that you are requesting.



Request Contact Name

Because this contact is used by multiple projects, you cannot change its contact name. Only an Administrator can. Please enter the desired change and it will be submitted to an Administrator for consideration.

Todd S Tanner

Request Cancel

3. Select **Request**.
4. An email is sent to the appropriate Administrator based on the rules for name changes. That Administrator can then change the name if appropriate.

Rules for Name Changes

- If only one Project uses an external contact, then anyone with access to edit external contacts can change the external contact name.
- If more than one Project uses an external contact, but both Projects have the same Project Manager, the Project Manager will have access to change the external contact name.
- If more than one Project uses an external contact, but all Projects are in the same District, the District Administrators will have access to change the external contact name.
- If more than one Project uses an external contact, and these Projects are in different Districts, the Statewide Administrator will have access to change the external contact name.

Notifications

Would you like to receive Email Notifications on things going on in the Address Book Module?

1. Select **User Profile** from the main menu.
2. Select **Privileges and Notifications**.
3. Scan to the **Address Book** section. This will list all activities that can take place in the Address Book Module.
4. Click into the Receive Notifications column for any activity you would like to be notified about. The text in the Email Notification is the same as what is placed in the Journal Entry, it's just sent directly to your Inbox.

NOTE: You will only receive Notifications for the Projects you have subscribed to. Subscribe to specific Project Numbers under User Profile/Notification Subscriptions or by clicking the Notifications column on the My Projects Tab.