



## People: Phone List and Contacts

Both the Phone List and Contacts areas are available under the 3-dot menu on the top right when in the People application.

A screenshot of the 'People' application interface. At the top left, there is a 'People' header with a person icon. Below it is a search bar. A navigation bar contains letters from 'A' to 'Z'. The main area displays a grid of employee profile cards. On the top right, a 3-dot menu is open, listing options: 'Staff list', 'View Organisation Chart', 'My profile', 'My settings', 'Skills Search', 'Phone List', and 'Contacts'. The 'Phone List' and 'Contacts' options are highlighted with a red box. A red box also highlights the 3-dot menu icon in the top right corner of the application.

## Phone List

The idea here is to allow any user to export users' contact information, should this be needed, e.g for record keeping or to assist an event taking place, like a conference.

If any fields have a special view permission on them, they will only appear here to users with appropriate rights to see them.

People > Phone List

Keywords:  All words

Role: All Extranet area: All

Group: Company Results per page: 10

With subgroups

City:

CSV delimiter:  Semicolon (;)  Comma (,)

Fields: First name Surname Mobile Company

Filter Reset Print CSV

First name	Surname	Mobile	Company
Jennifer	Langdon	07675389076	Claromentis Ltd
Pippa	Fraser	07554278690	Claromentis Ltd
Vanessa	Wright	07887320111	Claromentis Ltd

## Contacts

Any user can create personal contacts that are only for them to view and act as a phone book. These could be external suppliers, contractors or clients.

Ensure the 'Owner' permission has been used to keep the contact hidden from everyone else.

People > Contacts > Edit contact information

Title: Mr

First name: John

Surname: Test

Contact type: Supplier

Email: test@test.com

Company: Paper Ltd

Job Title: Senior Manager

Work location: London

Start typing to add... Browse Remove

Owner

View

Edit

View effective permissions...

Apply permissions

Any user can also create contacts that can be shared with other users/roles/groups to either view only or allow them to edit. e.g 'All registered' or specific Roles or Groups

People > Contacts > Edit contact information

Title: Mr

First name: John

Surname: Test

Contact type: Supplier

Email: test@test.com

Company: Paper Ltd

Job Title: Senior Manager

Start typing to add... Browse Remove

All registered

View

Edit

View effective permissions...

Apply permissions

People administrators can review the contacts shared with everyone to check they are appropriate, edit them or remove them as needed.

People > **Contacts**

Import contacts + Add a new contact

Keywords  All words Everywhere

My personal contacts  Other's contacts

CSV delimiter  Semicolon (;)  Comma (,) CSV

Filter Contacts Reset

Title	First name	Surname	Job Title	Company	Land line	Email	Mobile	Contact type
Mr	John	Test	Senior Manager	Paper Ltd		test@test.com		Supplier

Contacts can also be imported from CSV or vCard if your company has this already created:

People > **Contacts**

Import contacts + Add a new contact

Keywords  All words Everywhere

My personal contacts  Other's contacts

CSV delimiter  Semicolon (;)  Comma (,) CSV

Filter Contacts Reset

Title	First name	Surname	Job Title	Company	Land line	Email	Mobile	Contact type
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People > **Contacts** > **Import Contacts**

Import vCard (.vcf)  No file chosen

Import CSV (.csv)  No file chosen