

What is the Contact Feature?

The Contacts feature allows you to store and exchange information concerning a Contact. This includes:

- Addresses
- Telephone numbers
- Organizations
- Opportunities
- Correspondence
- Action Items

Contacts are Project Specific.

- The list of Contacts on one Project can be different from Contacts on another Project.
- Leaders and Contact Managers can be different from Project to Project so who manages the Contacts can vary among Projects.

Creating a Contact

- In Projecis, select the Contact Tab (Fig 1)
- Select the 'New Contact' sub tab on the far right
- Complete all the necessary information (Fig 2a,b)
 - New Organizations, Addresses, Phone numbers, etc. can be added by selecting the add/new option to the right of the field.
 - Availability can be used to limit who has access to a given Contact. If a Member does not have access to a Contact, they do not see the person on the Contact list.
 - The Contact can be 'Assigned' to a team member. This person usually serves as the point person for the Contact

Note:

- Only Leaders and Contact Managers on a Project can add/edit a Contact
- All Members who can see a Contact can add notes and add Correspondence notes for a Contact

Fig 1

The screenshot shows the PROJECIS interface for 'MSL communication'. The top navigation bar includes 'Project', 'Calendar', 'News', 'Files', 'Contacts', 'Discussions', 'Milestones', 'Tasks', 'Tickets', and 'Settings'. The 'Contacts' menu item is highlighted with a red box. Below the navigation bar, there are buttons for 'Contacts', 'Organizations', 'Opportunities', 'Map', 'Search', 'New Contact', and 'New Organization'. The 'New Contact' button is also highlighted with a red box. The main content area displays 'All Contacts' with a search bar and a list of 12 results. The list has columns for 'CONTACT', 'TYPE', and 'OWNER'.

CONTACT	TYPE	OWNER
Allgaier, Daniel	Principal Investigator	
Authorsen, Sven	PI and KOL	
Bahls, Hermann	Customer	
Barth, Albrecht	KOL	
Benito Ruiz, Jesús Benito Ruiz	PI and KOL	
Broc Iturralde, Laura Broc Iturralde	Customer	
Castanera de Molina, Jorge Castanera de Molina	Principal Investigator	
Cibula, David	Principal Investigator	
Králové, Hradec	Principal Investigator	
Nehasil, Jan	Principal Investigator	
Svoboda, Štěpán	Principal Investigator	
Ziegler, Jiří	Principal Investigator	

Fig 2a

The screenshot shows the 'New Contact' form in the PROJECIS interface. The form is titled 'New Contact' and includes a sub-header 'Complete this form to create a new contact.' The form fields are as follows:

- FIRST NAME:** Text input field with placeholder 'First Name'.
- LAST NAME:** Text input field with placeholder 'Last Name'.
- SALUTATION (OPTIONAL):** Dropdown menu with placeholder 'Salutation (e.g. Mr, Mrs, Dr)'.
- NICKNAME (OPTIONAL):** Text input field with placeholder 'Nickname'.
- CONTACT TYPE:** Dropdown menu with 'Principal Investigator' selected.
- ORGANIZATIONS (OPTIONAL):** Text input field with placeholder 'None' and a link 'Add Organization'.
- ADDRESSES (OPTIONAL):** Text input field with placeholder 'None' and a link 'New Address'.
- PHONE NUMBERS (OPTIONAL):** Text input field with placeholder 'None' and a link 'New Phone'.
- EMAIL ADDRESSES (OPTIONAL):** Text input field with placeholder 'None' and a link 'New Email'.
- SOCIAL LINKS (OPTIONAL):** Text input field with placeholder 'None' and a link 'New Social Link'.
- CONTACT SOURCE:** Dropdown menu with placeholder 'Contact Source'.
- OWNER:** Text input field with placeholder 'Assign this contact to a member' and a user selection icon.

Fig 2b

SOCIAL LINKS (OPTIONAL) New Social Link
None

CONTACT SOURCE
Contact Source

OWNER
Assign this contact to a member

AVAILABILITY
Public Sensitive Private Confidential

TAGS (OPTIONAL)
Tags

ATTACHMENTS (OPTIONAL)
Select File(s)

Add This Contact Save and Add Another Cancel

Contact Information

The Information screen of a given contact provides name(s) of organization(s), address(es), phone number(s) and comments concerning the contact. (Fig 3)

Fig 3

PROJECIS Search across all projects My Projects Paul TanPiengco

MSL communication

Project Calendar News Files **Contacts** Discussions Milestones Tasks Tickets Settings

Contacts Organizations Opportunities Map Search New Contact New Organization

Jan Nehasil
Principal Investigator
Owner: Unassigned
Created: 10 days ago by Paul TanPiengco

Actions
Edit Contact
New Opportunity
New Correspondence
Notify Others
Stop Watching
[Delete this contact](#)

ORGANIZATIONS
Uzsoki Utcai Kórház
Health Centre Prague - International Clinic

EMAIL ADDRESSES
WORK dsf2@sdf.net

PHONE NUMBERS
MOBILE +36 4943243

ADDRESSES
UZSOKI UTCAI KÓRHÁZ Uzsoki utca 29-41 Budapest HU 1145
HEALTH CENTRE PRAGUE - INTERNATIONAL CLINIC Vodičkova 28 110 00 Praha 1 CZ

Entries 1 comment, 0 updates
Paul TanPiengco test 4 days ago
Write a comment...
Attach a file to this comment
Post Comment

Contact Correspondence

The Correspondence screen shows all the correspondence entered by Project Members. All members who have access to a Contact can enter correspondence for a Contact and view correspondence from other members. (Fig 4)

Note:

- If a Contact is 'Assigned' to a Member that Member will be automatically notified of any comments or correspondence added to the Contact.
- If a Member would like to be notified of any comments or correspondence added to a certain Contact and is not 'Assigned' the Contact they can select 'Watch' in the Actions box on the right. (Fig Y)
 - Conversely, they can 'Stop Watching' if they do not wish to be notified of such changes. Fig 4

Fig 4

The screenshot shows the PROJECIS web application interface. The top navigation bar includes 'PROJECTS', a search bar, and user information for Paul TanPiengco. The main content area is titled 'MSL communication' and features a navigation menu with 'Contacts' selected. The contact details for 'Jan Nehasil' are shown, including his role as 'Principal Investigator' and the owner 'Unassigned'. The correspondence history shows two messages: one from Jan Nehasil to Paul TanPiengco on Nov 6, 2014, and one from Paul TanPiengco to Jan Nehasil on Nov 25, 2014. The 'Actions' menu on the right is highlighted, and the 'Stop Watching' option is selected, indicated by a red box. Below the correspondence, there is a section for 'Entries' with one comment from Paul TanPiengco test, dated 4 days ago. A 'Post Comment' button is visible at the bottom.

Custom Fields

You can edit fields that exist within the Contacts area to better serve your needs.

Characteristics:

- Only Leaders and Contact Managers can edit or add custom fields.
- Custom/Edited fields are project specific. Custom/edited fields in one project can be different from those in another project.

Steps:

- Click on the project you wish to edit the contact fields. (Fig 5)
- Select the 'Settings' tab on the far right
- Select the 'Customization' sub-tab
- In the light blue box on the left (Fig 5, 6)
 - The top portion reflects the current tabs that can be edited: Contact Type, Opportunity Type and Opportunity State.
 - The bottom portion reflects Custom fields that can be added to the Contact, Organization or Opportunity area.
- Select which you wish to edit and edit or select the field type you wish to add.

Fig 5

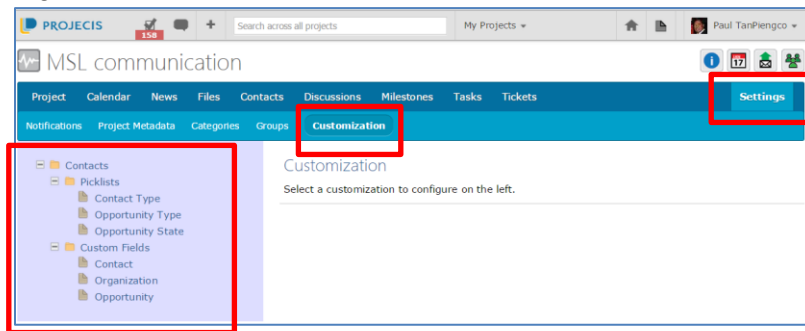
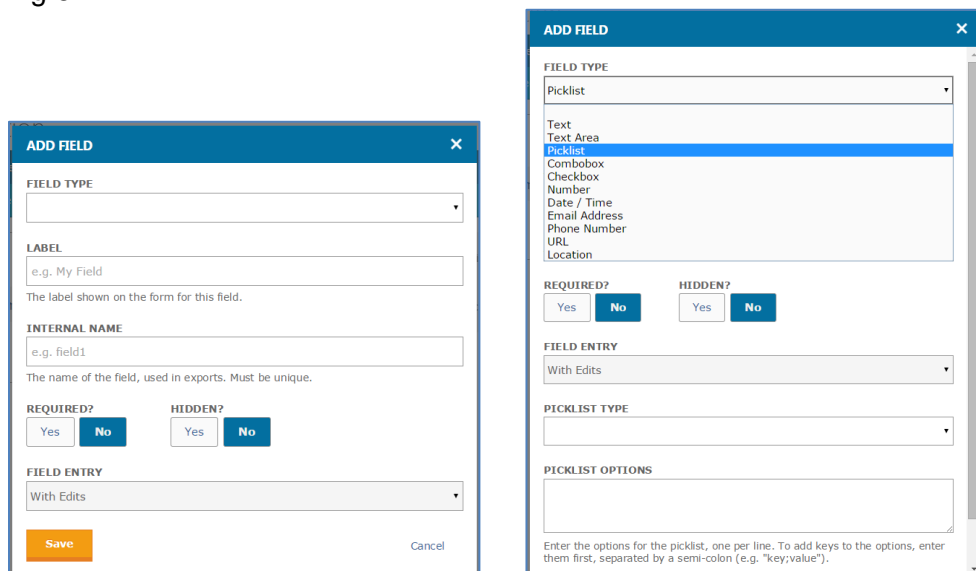


Fig 6



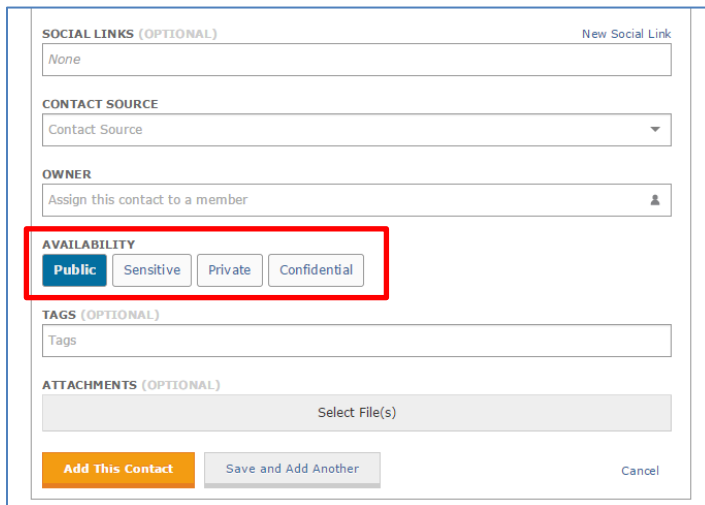
Controlling Contact Availability

The default availability is 'Public'; all members of the team can see the Contact. The Leader or Contact Manager can restrict who on the team has access to a Contact. Access can be restricted to individual members, members who are part of specific Companies, Specific Roles on the project or project defined Groups.

Selections (Fig 7a):

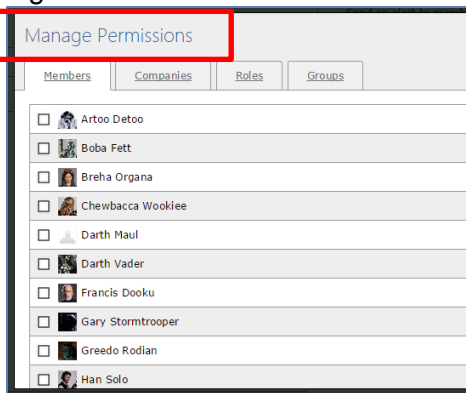
- Sensitive: The Contact is accessible to everyone on the team, except for members who are 'Restricted' on the Project
- Private: By using 'Manage Permissions' (Fig 7b) after selecting this button, access can be restricted to selected individuals, Companies, Roles, and/or Groups.
 - Contact will also be available to other 'Leaders' on the project even if they are not selected.
- Confidential: By using 'Manage Permissions' (Fig 7b) after selecting this button, access can be restricted to selected individuals, Companies, Roles, and/or Groups only.
 - Contact will not be available to other 'Leaders' on the project unless they are selected.

Fig 7a



The screenshot shows a form for adding a contact. The 'AVAILABILITY' section is highlighted with a red box and contains four buttons: 'Public' (selected), 'Sensitive', 'Private', and 'Confidential'. Other sections include 'SOCIAL LINKS (OPTIONAL)', 'CONTACT SOURCE', 'OWNER', 'TAGS (OPTIONAL)', and 'ATTACHMENTS (OPTIONAL)'. At the bottom are buttons for 'Add This Contact', 'Save and Add Another', and 'Cancel'.

Fig 7b



The screenshot shows the 'Manage Permissions' dialog box. The title bar 'Manage Permissions' is highlighted with a red box. Below the title bar are tabs for 'Members', 'Companies', 'Roles', and 'Groups'. The 'Members' tab is active, showing a list of team members with checkboxes for selection:

Member	Selected
Artoo Detoo	<input type="checkbox"/>
Boba Fett	<input type="checkbox"/>
Breha Organa	<input type="checkbox"/>
Chewbacca Wookiee	<input type="checkbox"/>
Darth Maul	<input type="checkbox"/>
Darth Vader	<input type="checkbox"/>
Francis Dooku	<input type="checkbox"/>
Gary Stormtrooper	<input type="checkbox"/>
Greedo Rodian	<input type="checkbox"/>
Han Solo	<input type="checkbox"/>

Recommended Web Browsers

We recommend using Google Chrome, Firefox or Safari (Apple) as the web browsers when using Projecis. Other browsers, such as Microsoft Internet Explorer, may not provide you access to all the features within the system.



Links to Download Recommended Browsers:

Google Chrome: <https://www.google.com/intl/en/chrome/>

Firefox: <https://www.mozilla.org/en-US/firefox/desktop/>