PROJECIS™

Contacts

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

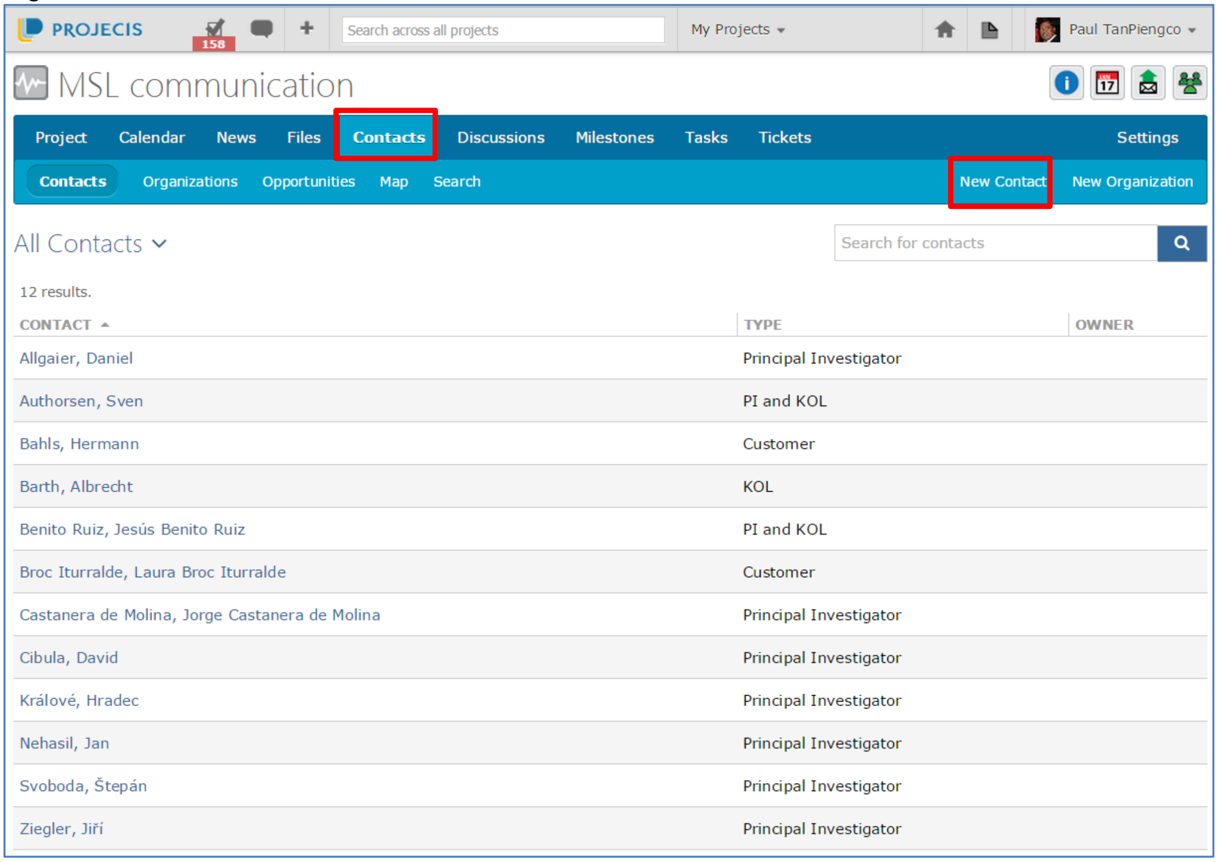
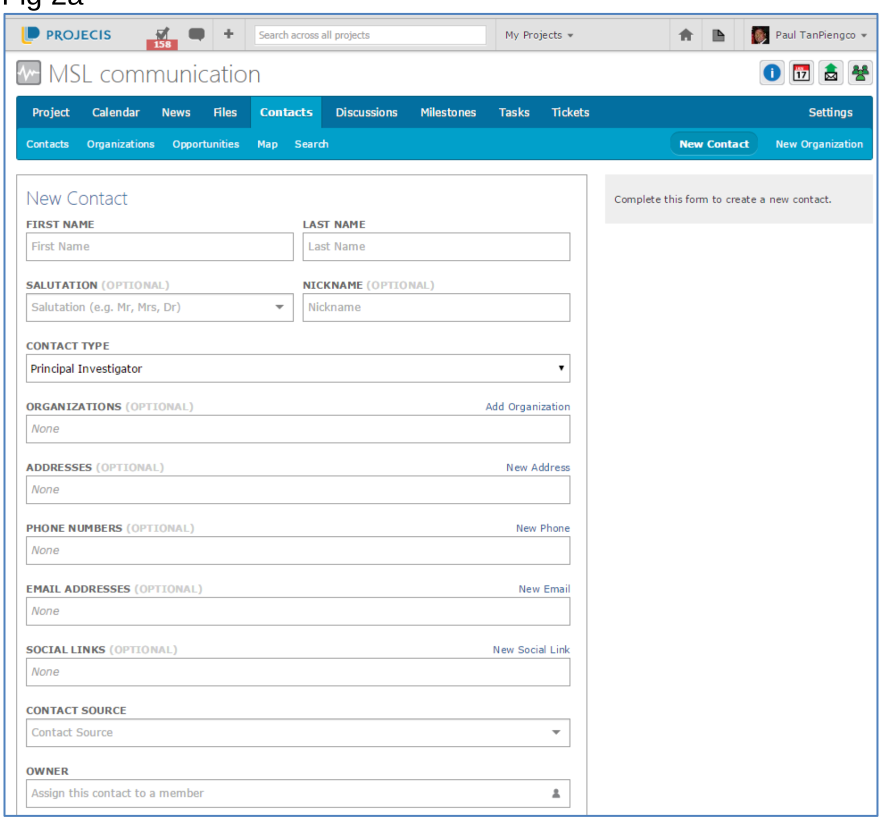

PROJECIS
158
Search across all projects
My Projects
Paul TanPiengco
MSL communication
Project
Calendar
News
Files
Contacts
Discussions
Milestones
Tasks
Tickets
Settings
Contacts
Organizations
Opportunities
Map
Search
New Contact
New Organization
All Contacts
Search for contacts
12 results.
CONTACT
TYPE
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, Štepán
Principal Investigator
Ziegler, Jiří
Principal Investigator

Fig 2a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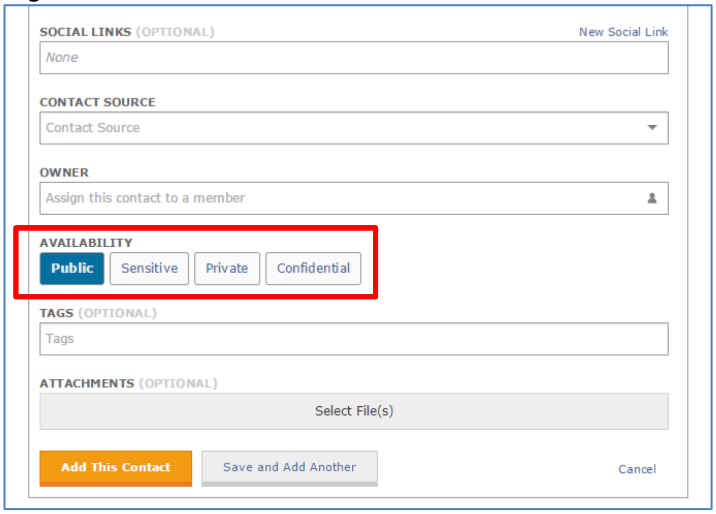
Contacts
Discussions
Milestones
Tasks
Tickets
Settings
Contacts
Organizations
Opportunities
Map
Search
New Contact
New Organization
New Contact
Complete this form to create a new contact.
FIRST NAME
First Name
LAST NAME
Last Name
SALUTATION (OPTIONAL)
Salutation (e.g. Mr, Mrs, Dr)
NICKNAME (OPTIONAL)
Nickname
CONTACT TYPE
Principal Investigator
ORGANIZATIONS (OPTIONAL)
Add Organization
None
ADDRESSES (OPTIONAL)
New Address
None
PHONE NUMBERS (OPTIONAL)
New Phone
None
EMAIL ADDRESSES (OPTIONAL)
New Email
None
SOCIAL LINKS (OPTIONAL)
New Social Link
None
CONTACT SOURCE
Contact Source
OWNER
Assign this contact to a member

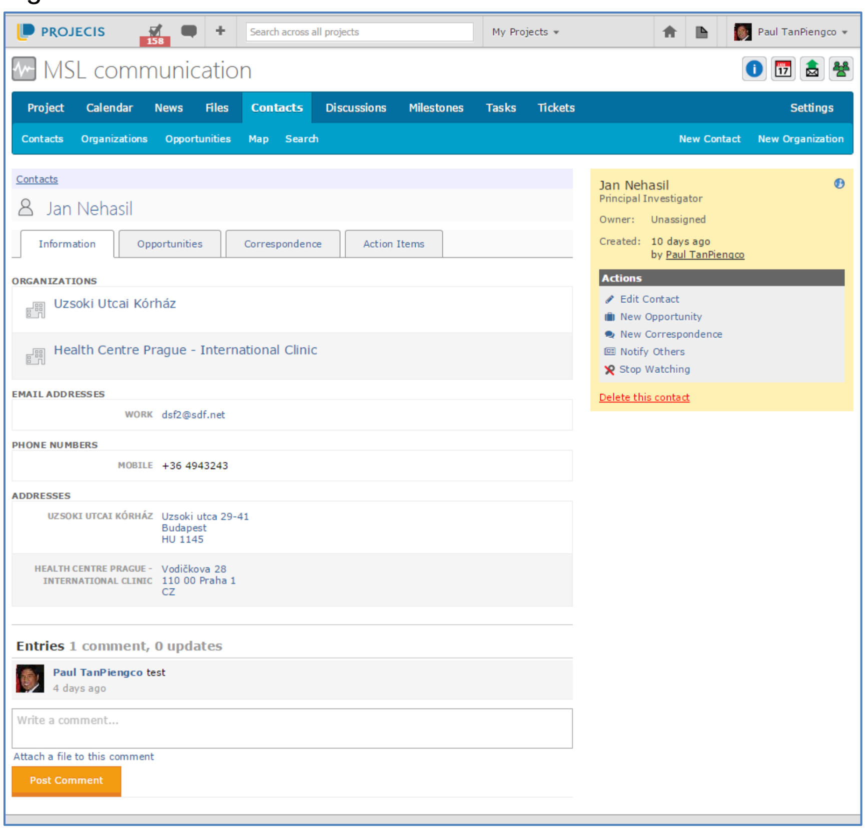
Fig 2b



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



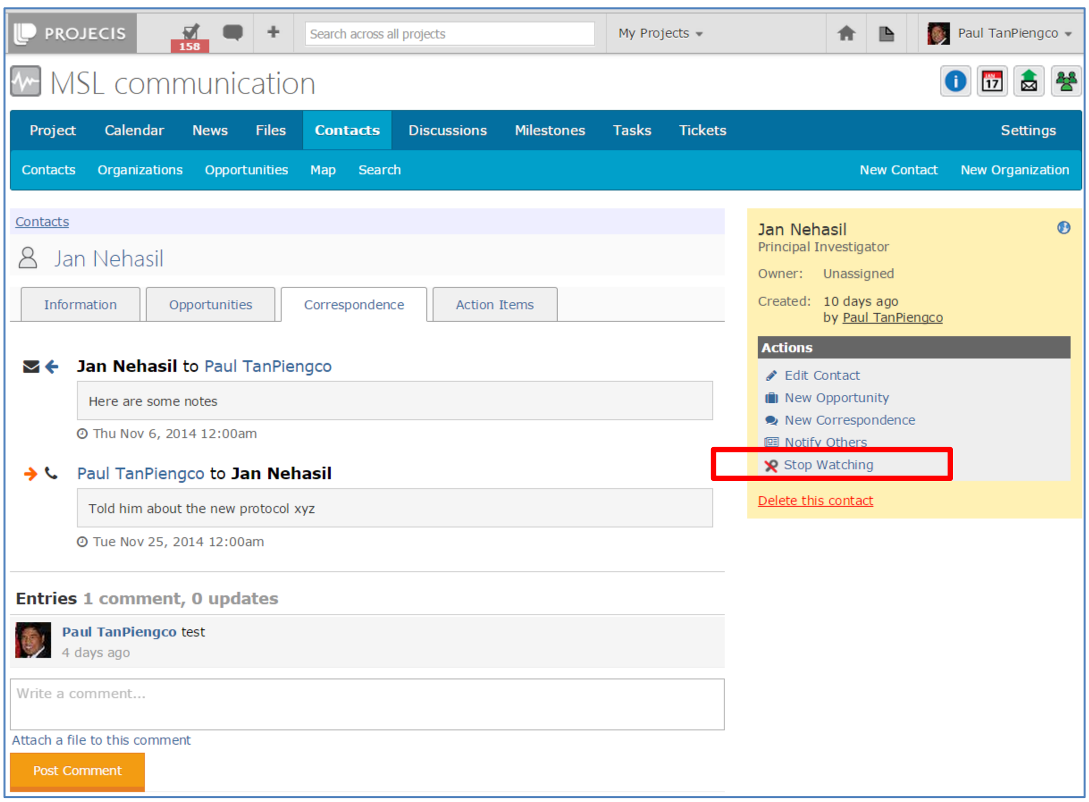
Contact Correspondence

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



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

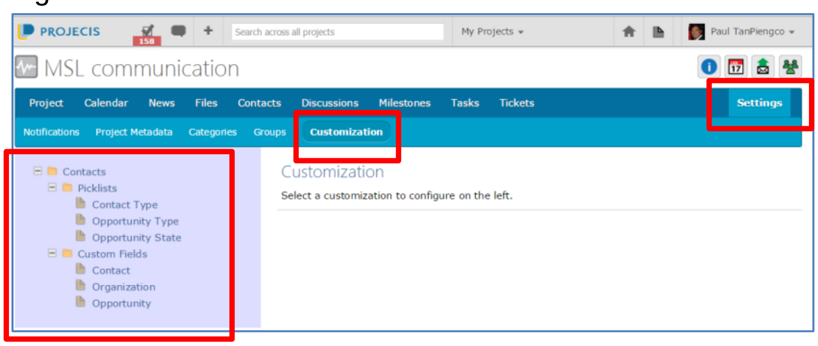
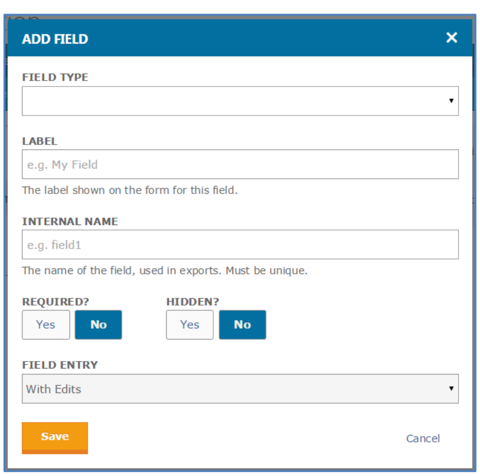
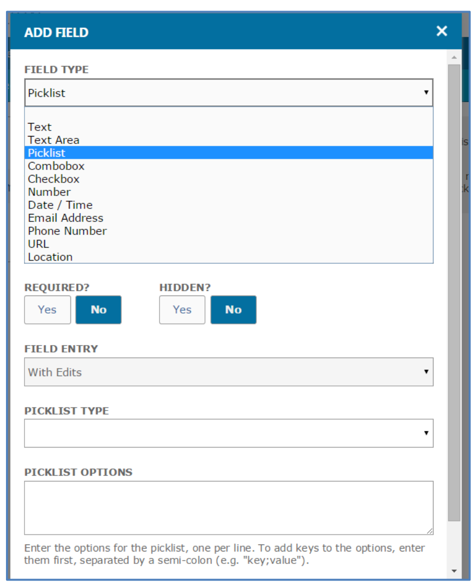


Fig 6





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 one 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 <u>will also be available</u> 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 <u>will not be available</u> to other 'Leaders' on the project unless they are selected.

Fig 7a

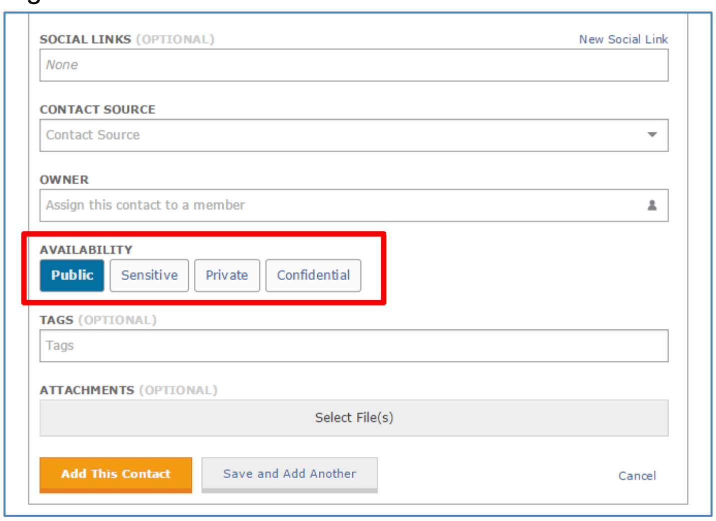
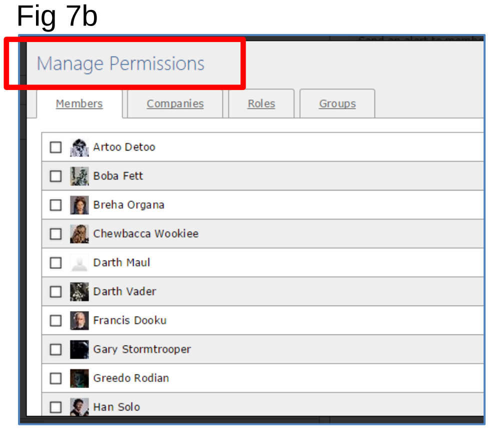


Fig 7b



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/