

# ADDRESS BOOK

ADDRESS BOOK

FIND CONTACT

ADD NEW CONTACT

MODIFY CONTACT

ADD ADDRESS

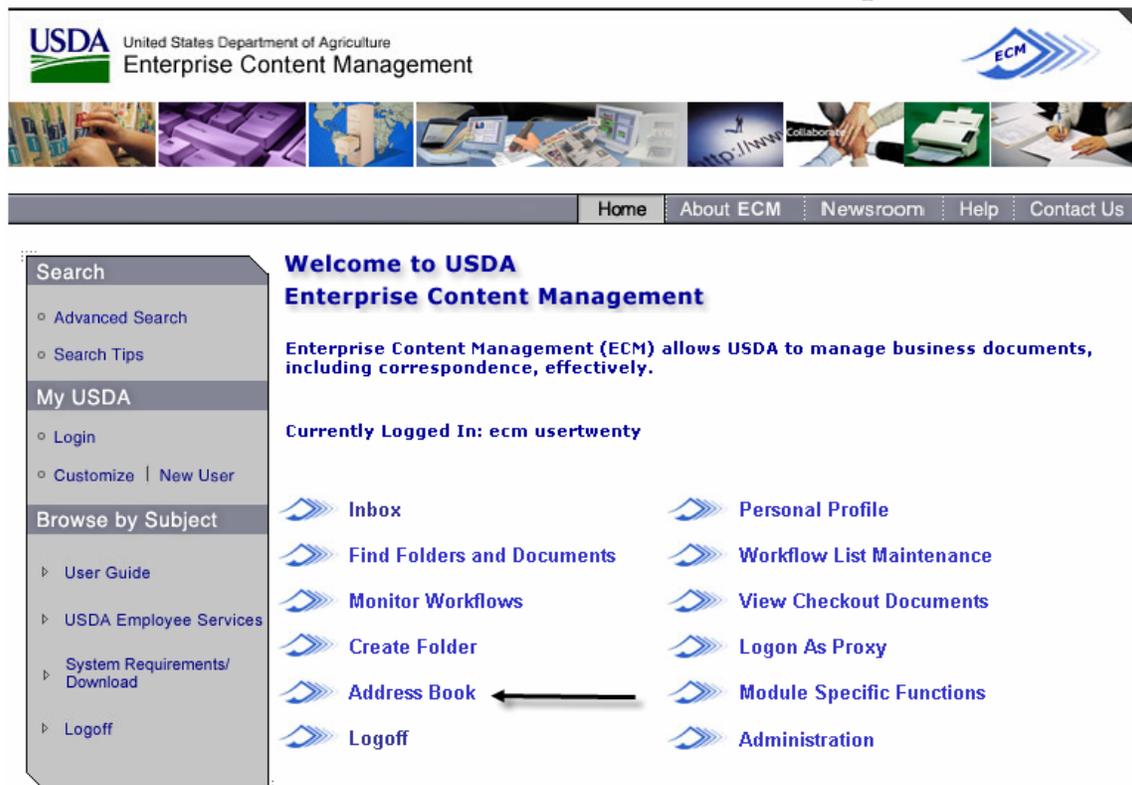
MODIFY ADDRESS

PRINT RESULTS SCREEN

SELECTING A CONTACT

## ADDRESS BOOK

The Address Book is accessed from the Main Menu as shown in **Figure 1**.



**Figure 1: Address Book**

This address book is shared by all system users. It allows a user to add or change contacts and their addresses. The main Address Book screen is shown in **Figure 2**.

Currently Logged In: [ecm usertwenty](#)      Return To: [Main Menu](#) | [Inbox](#)      August 24, 2006

### Address Book

Last Name:       First Name:       Find  
 City:       State:         
 E-Mail:       Street:   
 Position:       Organization:       Clear

Last Name	First Name	M	Email	City	State	Address	Zip	Phone	Organization	Position

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#### Addresses

Location Desc	Street	Street2	City	State	Zip

**Figure 2: Address Book – Main Screen**

The table in **Figure 3** describes the operations of each button on the on the Address Book screen.

Button	Description
Add New Contact	If the Contact cannot be found in the Address Book it can be added. Click <Add New Contact> to add a new Contact.
Modify Contact	Select a Contact from the top panel and click <Modify Contact> to edit the contact information.
Add Address	Select a Contact from the top panel then click <Add Address> to add another address for this contact.
Modify Address	Select a Contact from the top panel and an Address from the bottom panel to modify the Address.
Print Results List	Prints the query criteria and all Contacts in the top panel and with all of their addresses.
Print Contact	Prints Contact and Address information for the selected contact.
Select Contact	When this screen is called by a screen requesting a single contact, <Select Contact> will select the highlighted contact and return to the previous screen.

Figure 3: Address Book Operations

## FIND CONTACT

To find a contact, the user enters any combination of last name, first name, city, state, e-mail address, position and/or organization and clicks the <Find> button. The user may enter partial values and use a wild card character (\*) as shown in **Figure 4**.

The screenshot shows the 'Address Book' interface. At the top, it displays 'Currently Logged In: ecm usertwenty', 'Return To: Main Menu | Inbox', and the date 'August 24, 2006'. The search section includes fields for Last Name (containing 'S\*'), First Name, City, State (set to 'MO'), E-Mail, Street, Position, and Organization. A 'Find' button is located to the right of the search fields, and a 'Clear' button is below the Organization field. Below the search section is a table of contacts with columns: Last Name, First Name, M, Email, City, State, Address, Zip, Phone, Organization, and Position. The first row is highlighted in blue and contains: Sage, Larry, M, [empty], Kansas City, MO, 7908 NE 55th Str..., 6411... Below the table are navigation controls: 'First Prev 1 2 3 Next Last' and 'Showing 1 - 100 of 209'. Underneath is an 'Addresses' section with a table showing address details for the selected contact. The table has columns: Location Desc, Street, Street2, City, State, Zip. The first row is highlighted and shows: 7908 NE 55th Street, [empty], [empty], Kansas City, MO, 6411... The second row shows: 7908 Northeast 55th Street, [empty], [empty], Kansas City, MO, 6411... At the bottom, there are two rows of buttons: 'Add New Contact', 'Add Address', 'Print Results List', 'Select Contact' in the first row; and 'Modify Contact', 'Modify Address', 'Print Contact', 'Cancel' in the second row.

Last Name	First Name	M	Email	City	State	Address	Zip	Phone	Organization	Positio
Sage	Larry			Kansas City	MO	7908 NE 55th Str...	6411...			
Salater	Michelle			Creve Coeur	MO	111 Worthington...	63141			
Sales	Tom			Farmington	MO	Route 4, Box 44...	63640			
Saling	Linda			Pleasant Hills	MO	807 Johnson, Ap...	64080			
Salle	Marc			Kansas City	MO	1201 Walnut Street	64106...			
Samberg	Janice			Florissant	MO	2222 Lehne Court	6303...			

Location Desc	Street	Street2	City	State	Zip
	7908 NE 55th Street		Kansas City	MO	6411...
	7908 Northeast 55th Street		Kansas City	MO	6411...

Figure 4: Address Book – Find Contact

All matching contacts are found. The contact name and demographic information is displayed in the top panel. When the user highlights a contact, the available addresses for the contact are shown in the bottom panel.

## ADD NEW CONTACT

To add a contact to the Address Book, clicks on the <Add New Contact> button. The new contact information is entered as shown in **Figure 5**. The user clicks the <Save> button and the contact is added to the Address Book.

**Add New Contact**

**First Name:**

**Middle Name:**

**Last Name:**

**Rank/Title(Mr,Mrs,Dr,etc):**

**Salutation(Dear Mr, etc):**

**Email Address:**

**Organization:**

**Position:**

**Street:**

**Street2:**

**City:**  **State:**  **Zip:**

**Country:**

**Phone:**  **Fax:**

**Location Description:**

**Only an Application Administrator May Change this Contact**

**Figure 5: Address Book - Add New Contact**

## **MODIFY CONTACT**

To make changes to the contact, the user highlights the contact and clicks the <Modify Contact> button. The Modify Contact screen is displayed as shown in **Figure 6**.

**Modify Contact**

First Name: John

Initial:

Last Name: Smith

Rank/Title(Mr,Mrs,Dr,etc): Director

Salutation(Dear Mr, etc):

Email Address: js@hotmail.com

Organization:

Position:

Only an Application Administrator May Change this Contact

Save Cancel

**Figure 6: Modify Contact Information**

The user makes changes to any of the contact fields. To protect a contact from being modified, the user may click the ‘Only an Application Administrator May Change this Contact’ check box. An application administrator would need to make any changes to this contact (contact or address information) in the future. This option is shown on the Add New Contact and Modify Contact screens.

After making the desired changes, the user clicks the <Save> button. The system keeps track of the username and date/time that a contact was added or changed. The user is returned to the Address Book screen and the contact information is now updated.

## **ADD ADDRESS**

To add a new address for an existing contact, the user finds the contact. Then the user highlights the contact in the top panel and clicks the <Add Address> button. The Add Address screen is displayed and the information can be added as shown in **Figure7**.

**Add Address**

**First Name:** John  
**Middle Name:** W  
**Last Name:** Smith  
**Rank/Title:**  
**Salutation:**  
**Email Address:**  
**Organization:**  
**Position:**  
**Street:**  
1234 Mill St  
**Street2:**  
  
**City:** St. Louis      **State:** MO      **Zip:** 62222-1212  
**Country:** United States  
**Phone:** 314-555-5555      **Fax:** 314-666-6666  
**Location Description:** Travel  
  
     

Figure 7: Add Address for Contact

## MODIFY ADDRESS

To change an address for a contact, the user selects the contact in the top panel and the address to be changed in the bottom panel. Then the user clicks the <Modify Address> button. The Modify Address screen is displayed as shown in **Figure 8**. The user makes changes to any of the address fields and clicks the <Save> button. The system keeps track of the username and date/time that the address was added or changed.

**Modify Address**

**First Name:** John  
**Middle Name:** W  
**Last Name:** Smith  
**Rank/Title:**  
**Salutation:**  
**Email Address:**  
**Organization:**  
**Position:**  
**Street:**  
12200 Route B  
**Street2:**  
  
**City:** Hallsville **State:** MO **Zip:** 65255-9705  
**Country:**  
  
**Fax:** **Phone:**  
  
**Location Description:**  
Home Address

**Figure 8: Modify Address**

## **PRINT RESULTS LIST**

After a contact search the user may choose to print the list of contacts. The user clicks <Print Results List> and an report will be generated as seen in **Figure 9**.

**Address Book Results List**  
08/25/2006

**Search Criteria**

Last Name: garcia      First Name:  
City:                      State:  
E-Mail:                  Street:  
Position:                Organization:

Last Name	First Name	Middle	Email	Organization	Position
Garcia	Alejo	C.			
<u>Location</u>	<u>Street</u>	<u>Street2</u>	<u>City</u>	<u>State</u>	<u>Zip</u>
			San Diego	TX	78384
Garcia	Alfred				
<u>Location</u>	<u>Street</u>	<u>Street2</u>	<u>City</u>	<u>State</u>	<u>Zip</u>
	1601 Pennsylvania Northeast, #O-3		Albuquerque	NM	87110
Garcia	Alfredo				
Garcia	Allen				
<u>Location</u>	<u>Street</u>	<u>Street2</u>	<u>City</u>	<u>State</u>	<u>Zip</u>
	Route 2, Box 2180		Orland	CA	95963
Garcia					

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**Figure 9: Results List**

The user may choose to print the contact information for only selected address entry. In that case the user will highlight the contact and click<Print Contact>.

## SELECTING A CONTACT

The Select Contacts screen is displayed when the user clicks the Address Book icon next to a field that allows multiple contacts to be selected as seen in **Figure 10**. For example, the Folder Owner can select multiple Contacts (Correspondent, Addressee, and Referrer) when setting up the Folder of an incoming correspondence document.

Control Number:	4414	Status:	Active	Security Level:	Limited
Folder Owner:		Processing Code:			...
Mission/Staff:	Office of the Executive Secretariat	Agency:	None		...
Division:	None	Group:	Main Group		...
<b>Action Organization:</b>					
Mission/Staff:	Office of the Executive Secretariat	Agency:	None		...
Division:	None	Group:	Main Group		...
Correspondent:	0	→	☰	Date on Letter:	
Addressee:	0	→	☰	Received Date:	08/03/2006
Referrer:	0	→	☰	Referrer Due Date:	
Subject:		▼	☰	Related Folders:	
					Go ...
					Save More

**Figure 10:Contacts for an Incoming Folder**

When the user clicks the Address Book icon, the Select Contacts screen is displayed as shown in **Figure 11**.

### Select Contacts

Last Name:

City:

E-Mail:

Position:

First Name:

State:

Street:

Organization:

Last Name	First Name	M	Email	City	State	Address	Zip	Phone	Organization	Position

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#### Addresses

Location Desc	Street	Street2	City	State	Zip

Correspondent:  
  Addressee:  
  Referrer:

#### Selected Contacts and Addresses

Role	Last Name	First Name	M	Email	City	ST	Address	Zip	Phone #	Organization

<input type="button" value="Add New Contact"/>	<input type="button" value="Add Address"/>	<input type="button" value="Print Results List"/>	<input type="button" value="Done"/>
<input type="button" value="Modify Contact"/>	<input type="button" value="Modify Address"/>	<input type="button" value="Print Contact"/>	<input type="button" value="Cancel"/>

**Figure 11: Select Contact and Address**

The user selects a contact by entering the query criteria and clicking the <Find> button.

Then the user selects a contact in the top panel and an address in the middle panel and then clicks the <Select> button. If the contact is not in the address book or the contact information needs to be changed, the user can make the necessary changes. The buttons on the Select Contacts screen work the same as the buttons on the Address Book screen.

When all the contacts have been selected, the user clicks <Done> as seen in **Figure 12**.

Always save changes before closing the Folder.

### Select Contacts

**Last Name:**       **First Name:**       **Find**  
**City:**       **State:**    
**E-Mail:**       **Street:**   
**Position:**       **Organization:**       **Clear**

Last Name	First Name	M	Email	City	State	Address	Zip	Phone	Organization	Positio
Starr	Anne Rebe...			Somerville	MA	391 Broadway	02145			
Starr	Anthony			Saint Louis	MO	Apt G, 2408 Sout...	63104			
Starr	Barbara			Danbury	CT	39 Clearview Av...	06811			
Starr	Curtis	H.		Malta	MT	Box 1637	59538			
Starr	D.	C.		Billings	MT	4960 Cheyenne ...	5910...			
Starr	Derek			Riverside	CA	PO Bx 51484	92517			

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#### Addresses

Location Desc	Street	Street2	City	State	Zip
	PO Bx 51484		Riverside	CA	92517

Correspondent     Addressee     Referrer:

#### Selected Contacts and Addresses

Role	Last Name	First Name	M	Email	City	ST	Address	Zip	Phone #	Organization
Correspondent	Garcia	Alejo	C.		San Diego	TX		78384		
Addressee	Smith	George	S.		Jackson	MS	316 South Presid...	3920...		
Referrer	Starr	Derek			Riverside	CA	PO Bx 51484	92517		

            ←  
           

**Figure 12: Selecting Contacts**

The user is returned to the Folder and the contact fields are populated as seen in **Figure 13**.

<b>Control Number:</b> 4414	<b>Status:</b> Active	<b>Security Level:</b> Limited
<b>Folder Owner:</b>	<b>Processing Code:</b> <input type="text"/>	<input type="button" value="..."/>
<b>Mission/Staff:</b> Office of the Executive Secretariat <input type="button" value="..."/>	<b>Agency:</b> None <input type="button" value="..."/>	
<b>Division:</b> None <input type="button" value="..."/>	<b>Group:</b> Main Group <input type="button" value="..."/>	
<b>Action Organization:</b>		
<b>Mission/Staff:</b> Office of the Executive Secretariat <input type="button" value="..."/>	<b>Agency:</b> None <input type="button" value="..."/>	
<b>Division:</b> None <input type="button" value="..."/>	<b>Group:</b> Main Group <input type="button" value="..."/>	
<b>Correspondent:</b> 1 Garcia, Alejo C. <input type="button" value="v"/>	<b>Date on Letter:</b> <input type="text"/>	<input type="button" value="..."/>
<b>Addressee:</b> 1 Smith, George S. <input type="button" value="v"/>	<b>Received Date:</b> 08/03/2006 <input type="button" value="..."/>	
<b>Referrer:</b> 1 Starr, Derek <input type="button" value="v"/>	<b>Referrer Due Date:</b> <input type="text"/>	<input type="button" value="..."/>
<b>Subject:</b> <input type="text"/>	<b>Related Folders:</b> <input type="text"/>	<input type="button" value="Go"/> <input type="button" value="..."/>
<input type="button" value="Save"/>		<input type="button" value="More"/>

**Figure 13: Address Fields Populated**