



eXo Address Book Manual

Version 2.0

eXo Collaboration provides a rich, Web 2.0 browser-based interface with comprehensive messaging and indexing; archival and search capabilities; shared calendars, address books, and much more features soon.

eXo Address Book manages your private and public contacts in your organization. A contact lets you keep precious information such as personal or professional address and other reaching information such as telephone, fax, email or IM. We support VCard format import/export so that you can consolidate your existing contacts into a single place. Additionally, you can refer your contacts from other applications such as **eXo Calendar**, **eXo Web Mail**.

eXo Address Book is built on foundation of **eXo WebOS** with several new features designed to make your online contact experience more productive and convenient. All actions are easily reached by contextual menus and intuitive drag and drop. Searching for contacts is very convenient with full text search and criteria based search on contact properties.

eXo Team

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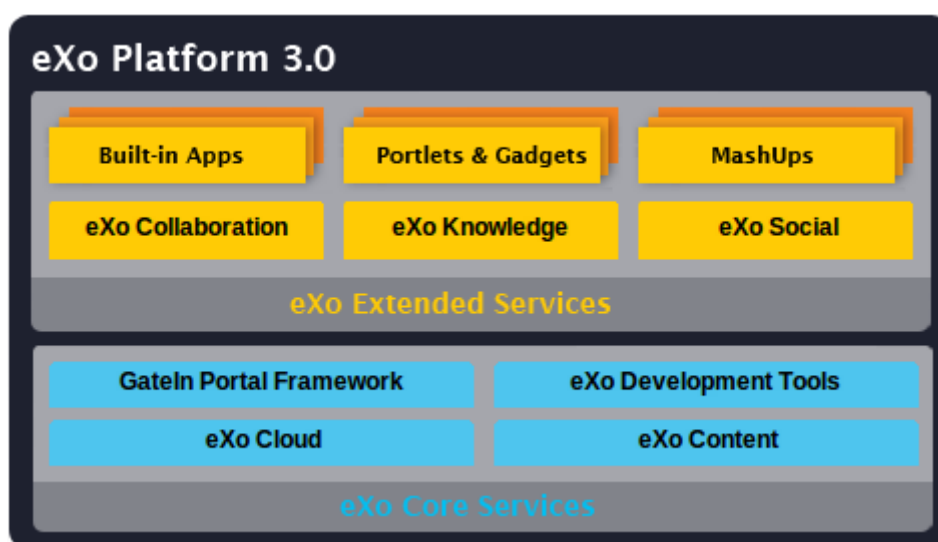
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1 Preface

1.1 Overview

Beginning as an Open Source project in the year 2002, eXo is well-known as the industry's first Java portlet container. With the aim of dominating the potential portal market through robust and easy-to-use applications, eXo Project succeeded in attracting consumers in the whole world. eXo actually opened the floodgates to various options in many markets, and customers have been choosing eXo as the best method for their success.

The eXo Platform™ software is a powerful Open Source corporate portal and content management system. Users of the platform have a customized single point of access to the company's information system and resources.



The foundation for eXo Platform 3.0 is eXo Core Services, a powerful set of REST-based services for rapid website development, content management and gadget-based development and deployment. eXo Extended Services are also a part of the eXo Platform 3.0 running on top of eXo Core Services to enable easy development of rich, user-centric web applications.

eXo Collaboration is one of eXo Extended Services,. It provides a rich Web 2.0 browser-base interface with a suite of collaborative applications targeted at team work coordination and information sharing. eXo Collaboration offers intuitive and powerful Mail, Chat, Calendar and Address Book functionality as a seamless extension to portal-based application.

1.2 About this document

The intended reader of this manual is users of eXo Address Book. This manual will explain all the basic and advanced features that eXo Address Book provides. It gives an in depth examples and easy explanation of using eXo Address Book to create, manage and share your contacts.

It is also useful for the following groups:

- Users who use **eXo Collaboration** with eXo Address Book in their work and business.
- Integrators who want to know more about the rich knowledge features in order to advise their customers to use eXo products.

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- Users who use **eXo Collaboration** with eXo Address Book in their work and business.
- Integrators who want to know more about the rich knowledge features in order to advise their customers to use eXo products.

This user guide will help you:

- know basic concepts used in the eXo Address Book
- know how to create, edit, manage & share contacts.

1.3 References & related resources

Related Documents

- GateIn Guide
- eXo Calendar User Guide v2.0
- eXo Mail User Guide v2.0
- eXo Chat User Guide v2.0

Info & Support

Information

- [eXo Home Page](#)
- [eXo Wiki](#)

Support

- [Forums](#)
- [FAQ](#)

Download

- [eXo Content](#)

- [eXo Development tools](#)
- [Gatein Portal Framework](#)
- [eXo Collaboration](#)
- [eXo Knowledge](#)
- [eXo Social](#)

Resource Center

- [Video demos, tutorials, webinar archives, features & benefits tables and more](#)


2 Overall Introduction

2.1 What is eXo Address Book?


eXo Address Book is a web based on contact management application. Using eXo Address Book to store and maintain contact information about friends, family and your professional network, etc in a single place. You can access it with a browser connected to your enterprise network.

2.2 Access to eXo Address Book

To access to the Address book, you can follow one of these ways:

Click on  **Contacts** from the top navigation bar:



Or click on  right from the Chat bar:



2.3 eXo Address Book interface

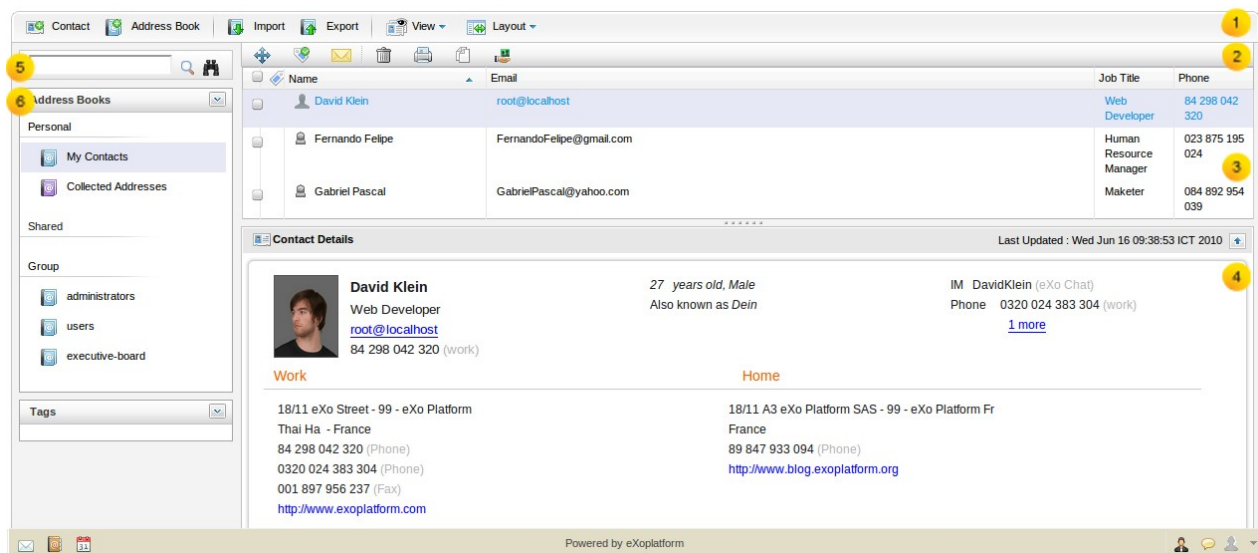


Illustration 1: The main screen of the Address Book application

Details

| | |
|---|---|
| 1 | This is the Tool bar which allows you to add new contact/address book, import/ export address book, view and customize layout. |
| 2 | This is the Action bar which allows you to taking basic actions such as move, delete, copy, print, add tag selected contacts |
| 3 | This is the Contact list which shows all contacts in a specific address book |
| 4 | This is the Contact view panel which displays detail information of the selected contact |
| 5 | This is the Navigation panel which contains search panel, address books list and tags list |
| 6 | This is the Search panel which allows you to do the simple and advanced search to find expected contacts. |

2.4 eXo Address Book configuration

By default, there are 3 categories of address books in eXo Address Book: Personal address book: This address book which may only be viewed by you. It is stored in the Personal list. In eXo Address Book, the My contacts is the default personal address book which contains your default contact matching with your registration information. In addition, the Collected Address book contains all email contacts updated automatically during using eXo Mail. For example, when you receive an email sent from a new sender address which is not in your address book, this address will be automatically added into the Collected Address book.

- **Shared address book:** This address book can be shared with other users. In eXo Address Book, it is stored in the Shared list. The shared address book can be viewed and updated by shared users if they are granted edit permission .
- **Public address book:** This address book is shared by group and can be viewed by everyone. In eXo Address Book, the public address book contains default contacts of the other users in different groups and can be viewed only.

3 How to use eXo Address Book?

3.1 Getting Started

3.1.1 Register new account

- ✓ To register a new account on the GateIn, do as follows:

Step 1: Go to the portal by typing URL in address bar (e.g: <http://localhost:8080/portal>).

The anonymous home page will be displayed:

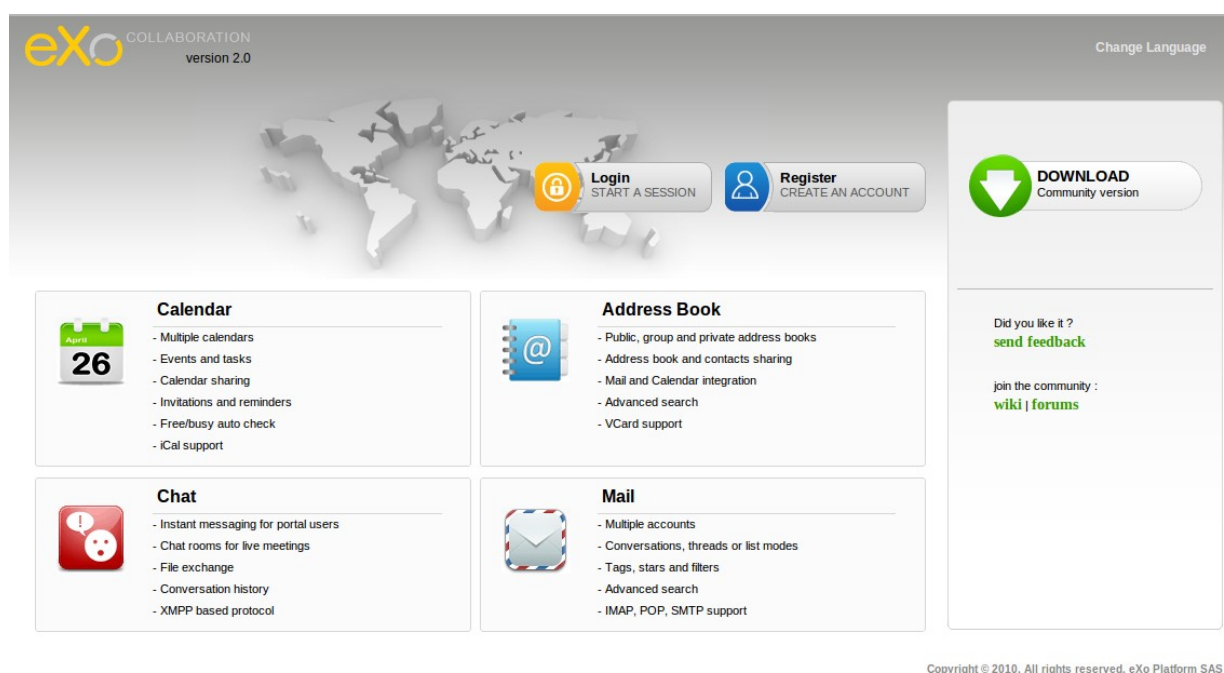

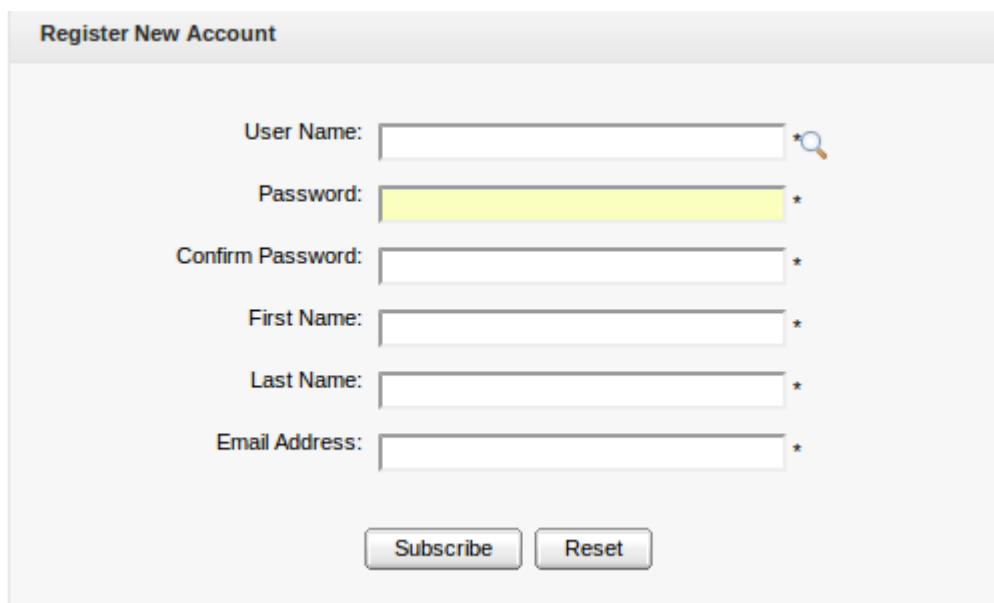


Illustration 2: eXo Collaboration Homepage

Step 2: Click the  **Register** button on the navigation bar. The **Sign up** form will appear.




The image shows a web form titled "Register New Account". It contains several input fields: "User Name:" with a search icon to its right, "Password:" with a yellow highlight and an asterisk, "Confirm Password:" with an asterisk, "First Name:" with an asterisk, "Last Name:" with an asterisk, and "Email Address:" with an asterisk. At the bottom are two buttons: "Subscribe" and "Reset".

Illustration 3: The Register New Account form

Details:

(*): required

| | |
|-------------------------|---|
| User Name | The name of user that will be used to sign in. It must be unique. |
| Password | The secret string used to login. It must have at least 6 characters. |
| Confirm Password | The re-typed password. Password and Confirm Password must be the same |
| First Name | Your first name |
| Last Name | Your last name |
| Email Address | Your contact email address. |
| Subscribe button | Click this button to accept saving the new account |
| Reset button | Click this button to clear all inputted values. |

Step 3: Click the  icon to search and check for the availability of your User name

Step 4: Input values in all required fields in the **Register New Account** form.

Step 5: Complete registering a new account by clicking the **Subscribe** button.



There will have an alert messages and you can not add new account if at least one of these cases occurs:

- **User name** is existing or **User Name** is invalid
- Password has less than 6 characters.
- **Password** and **Confirm Password** are not the same
- **Email Address** is in invalid format
- Required fields are empty

3.1.2 Sign in & sign out

- ✓ To sign in, do as follows:

Step 1: Go to the portal in a public mode by typing the portal URL in your address bar (e.g: <http://localhost:8080/portal>)

Step 2: Click the  **Login** button . The **Sign in** form will be displayed:

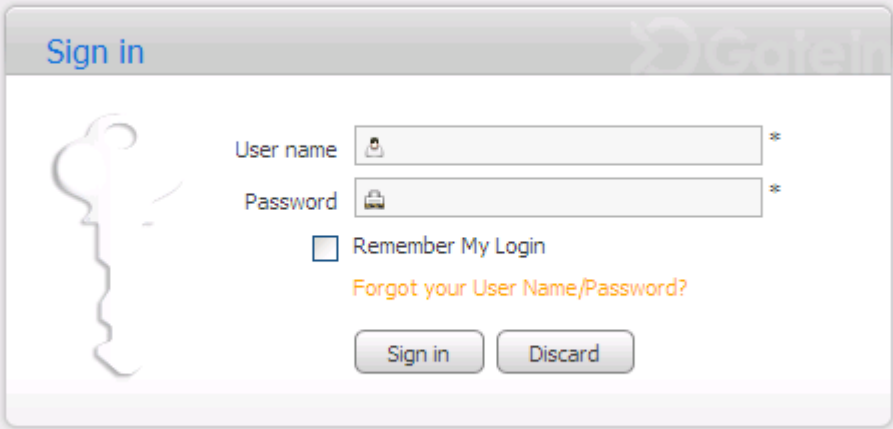


Illustration 4: The Sign in form

Step 3: Input your registered **User name** and **Password**.

Details:

(*): required

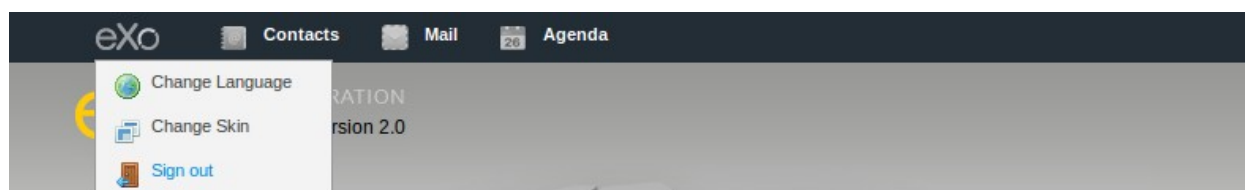
| | |
|---------------------------------------|--|
| User name | Your registered user name |
| Password | Your registered password |
| Remember My Login | When the Remember my Login is checked, your computer will save your login information. The next time you login, you don't have to type your User Name and password again. |
| Forgot your User Name/Password | To show the guide line that must be followed to get the forgotten User Name/Password |
| Sign in button | To accept signing in |
| Discard button | To exit the Sign in form |

Step 4: Click the **Sign in** to complete signing in.



Illustration 5: The Gateln page after signing in successfully

✓ To sign out, just click the eXo logo () and select **Sign out** from the menu:



3.2 Address Book Management


3.2.1 What is an address book?


An address book is a book or a database used for storing entries called contacts. Each contact entry usually consists of a few standard fields (for example: first name, last name, company name, address, email, phone number...). An address book makes it easy and efficient to organize and manage contacts. As mentioned above, **eXo Address Book** has three address book types: Private, Shared and Public.

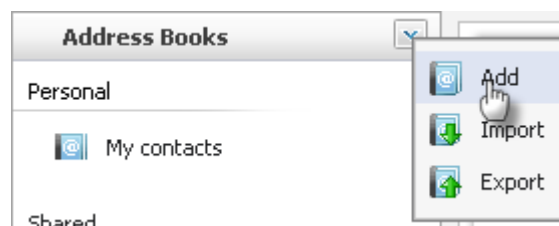
3.2.2 Create an Address book

- ✓ To create an address book, do as follow:

Step 1: Open the **Add Address book** form. There are three ways to do this step:

The 1st way: Click the  **Address Book** button on the main tool bar.

The 2nd way: Click the  icon in the Address Book bar and select **Add** in the drop down list menu:



The Add/edit Address book form will appear:

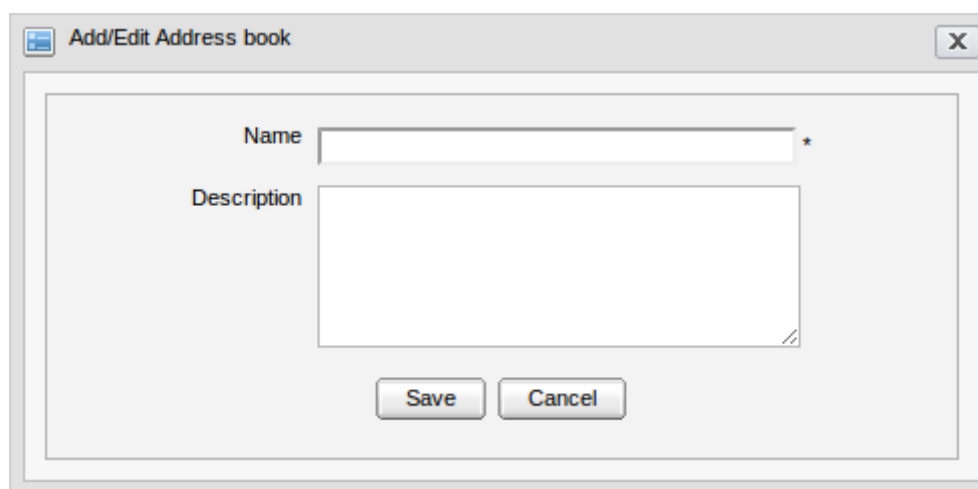
A screenshot of the 'Add/Edit Address book' dialog box. It has a title bar with a close button. Inside, there are two input fields: 'Name' (a single-line text box) and 'Description' (a multi-line text area). Below these fields are two buttons: 'Save' and 'Cancel'.

Illustration 6: The Add/Edit Address Book form

Details:

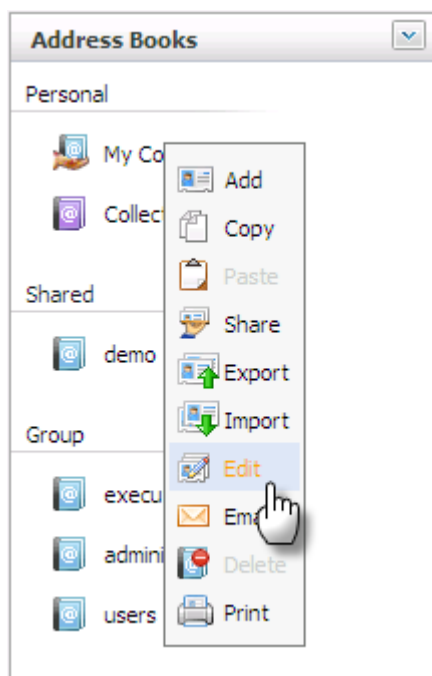
(*) required

| | |
|-----------------------|--|
| Name | The display name of the address book |
| Description | The brief description of the address book |
| Save button | To accept saving a new address book |
| Cancel button: | To exit/close the Add/Edit Address book without changes |

Step 2: Enter values for the **Name** and **Description** fields**Step 3:** Complete adding the new address book by clicking the **Save** button.*You can create a new address book from the Mail portlet (See eXo Mail User Guide for details)*

3.2.1 Edit an address Book

- ✓ To edit an address book, do as follows:

Step 1: Right click on an existing address book and select **Edit** in the drop down menu:**Step 2:** The Add/Edit Address Book will be displayed. Now you can edit the name and description of selected address book.

Step 3: Click the **Save** button to accept the changes or click the **Cancel** button to exit the form without changes.

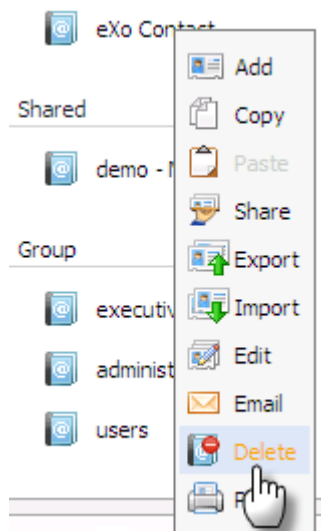


You can only edit a personal address book or a shared address book in case you have the edit permission. You can not edit a public address book.

3.2.2 Remove an address book

✓ To remove an address book, do as follows:

Step 1: Right click on an existing address book, and then select **Delete** in the menu:



Step 2: Click the **OK** button in the confirmation message to accept deleting the address book or click the **Cancel** button to abort.



- You can not delete your default and public address book
- You can delete your personal address book which is added by yourself flexibly

3.2.3 Export an address book

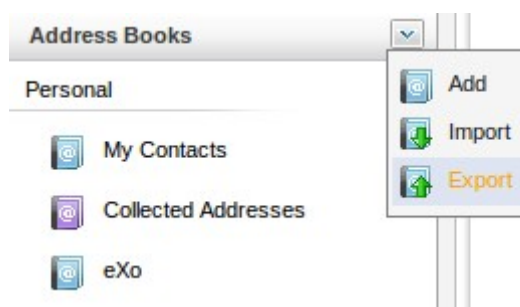
This function allows exporting one or more address books into a separate file in your computer in order to make it easy to backup your address book or import it into another address book application.

✓ To export an address book, do as follows:

Step 1: Open the **Export Address Books** form. There are two ways to do this step:

The 1st way: Click the Export button  in the main tool bar

The 2nd way: Click the  icon in the Address Books bar and select **Export** in the menu:



The **Export Address Books** form will appear with a list of all existing address books:

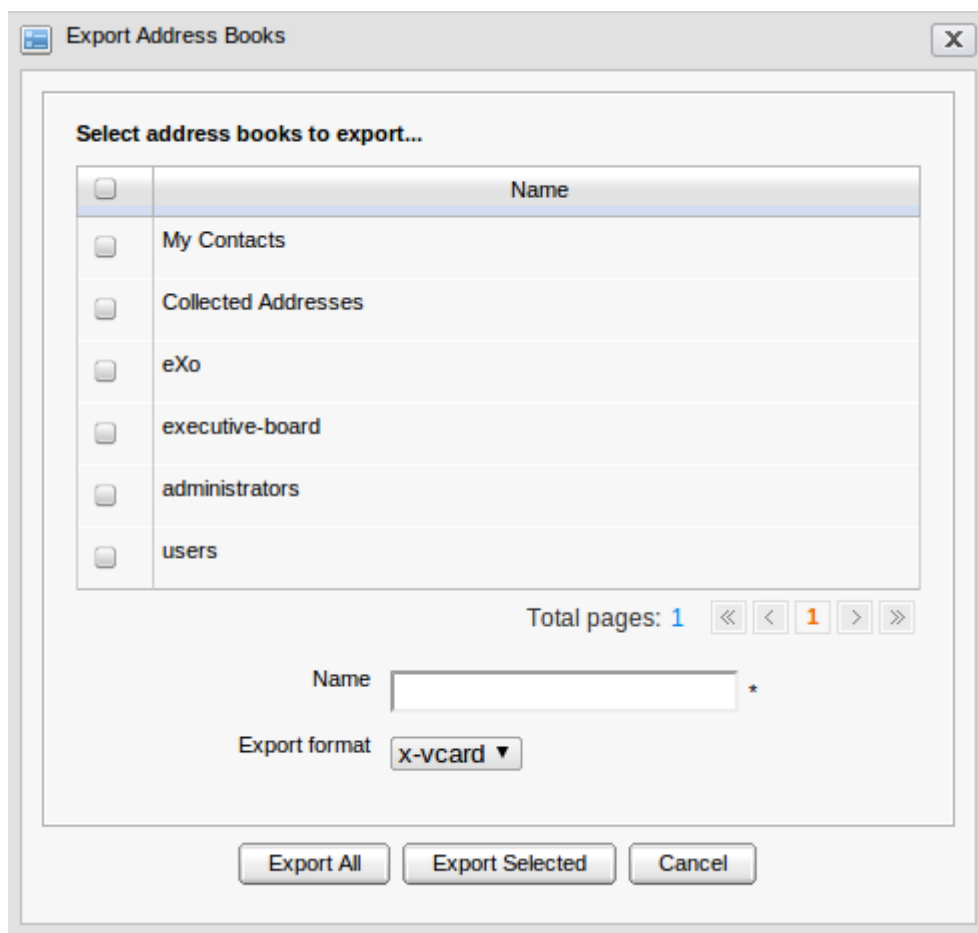
The screenshot shows the 'Export Address Books' form. It has a title bar with a close button. The main content area is titled 'Select address books to export...'. It contains a table with a header 'Name' and a column of checkboxes. The table lists the following address books: 'My Contacts', 'Collected Addresses', 'eXo', 'executive-board', 'administrators', and 'users'. Below the table, there is a 'Total pages: 1' indicator with navigation buttons. There is a 'Name' field with a text input box and an asterisk. Below that is an 'Export format' dropdown menu set to 'x-vcard'. At the bottom, there are three buttons: 'Export All', 'Export Selected', and 'Cancel'.

Illustration 7: The Export Address Books form

Step 2: Select the address book(s) which you want to export by selecting its corresponding check box(s) (or select the top checkbox to select all)

Step 3: Enter a file name for the **Name** field

Step 4: Select format for the imported file (e.g x-vcard)

Step 5: Click the **Export All** button to start exporting all the address books or click the **Export Selected** button to export the selected ones only.

A download pop-up window will appear. Depend on what browser you are using, the download pop-up window may show differently.

3.2.4 Share an address book

This function allows you to share your personal address books with specific groups or users. The shared address book will be displayed in the shared address book list of your selected groups or users and can be viewed, exported, added, edited or deleted (if the shared user has edit permission on it). The shared address book can be distinguished by the hand icon:

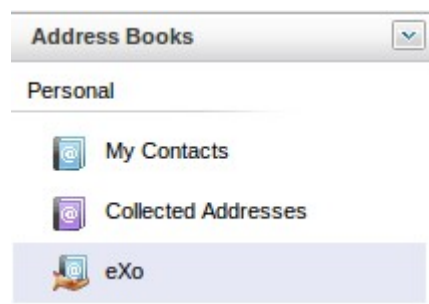


Illustration 8: The shared address books

- ✓ **To share a personal address book, do as follows:**

Step 1: Right click on the address book you want to share and select **Share** in the drop down list menu:



The **Share address book** form will appear:

Illustration 9: The Share Address Book to other users form

Step 2: Select users/group to share.


To select Users for sharing, do as follows:

1. Click the  icon, the **User Selector** form appears:

| | User Name | First Name | Last Name | Email |
|--------------------------|-----------|------------|-----------|----------------|
| <input type="checkbox"/> | demo | Demo | gtn | |
| <input type="checkbox"/> | john | John | Anthony | john@localhost |
| <input type="checkbox"/> | mary | Mary | Kelly | mary@localhost |
| <input type="checkbox"/> | root | Root | Root | root@localhost |

Illustration 10: The User Selector form

Select user(s) to share by clicking on the corresponding check-box(s).

You can also select for specific user(s) by User name, Last name, First name, Email. Type search words in the search box, select the search criteria and then click the  icon to search.

2. Click the **Add** button to add selected users to the shared list or click the **Close** button to close this form.

✓ **To select a group for sharing, do as follows:**

1. Click the  icon, the **Group Selector** form appears:

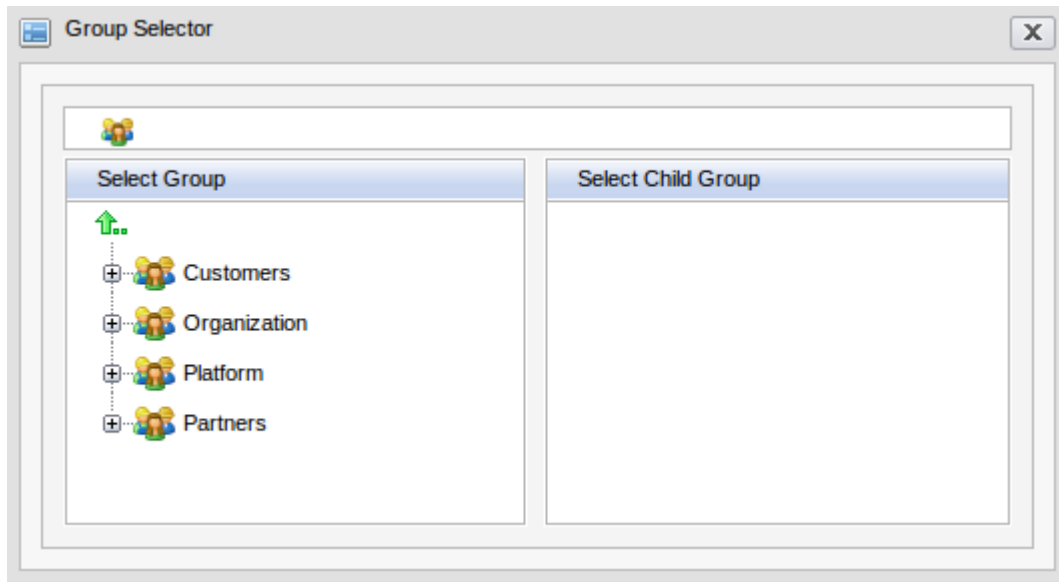


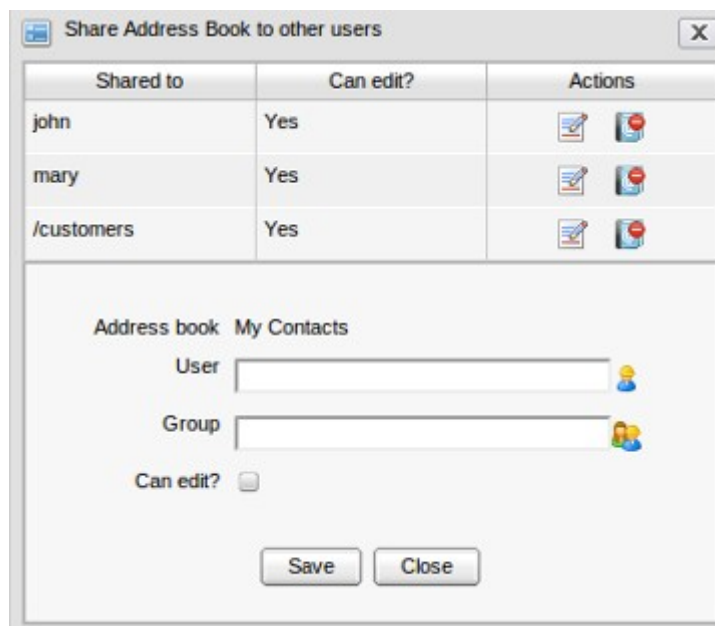
Illustration 11: The Group Selector form

2. Select groups in the left pane to view sub-groups in the right pane, and then select a sub-group.

Step 3: After selecting User/group to share, click the **Save** button to accept sharing with the selected user/group or click the **Close** button to quit the sharing form.

You can select the **“Can edit?”** check box if you want to grant edit permission on this address book to the selected user/group. The user/group(s) having edit permission can view export, import, add, edit and delete the shared address book while the user/group does not have edit permission can view and export only.

After sharing, the shared users/groups will be updated into the share list with detailed information like the illustration below:



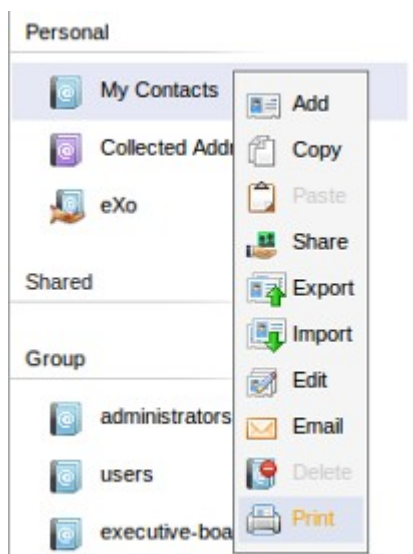
In the **Actions** column, you can click the icon to change the edit permission of corresponding user/group or click the icon to remove specific user/group from the Share list.

3.2.5 Print an address book

This function allows you to print summary information of contacts in form of visit cards. You can print all contacts of an address book at a time.

✓ **To print address book, do as follows:**

Step 1: Right click on the address book which you want to print and select **Print** in the drop-down menu:



The print preview page will appear:



Illustration 12: The VCards Print Preview form

Step 2: Click the **Print** button to start printing or the **Close** button to exit the preview print dialog.

3.3 Contact management

3.3.1 What is a contact?

A contact is a person or an organization you've added to your contact list. By adding a person as a contact, you can easily check out the person's or the organization's profile (name, address, email and phone number...)

3.3.2 Add a new contact

This function allows you to add new contacts to personal address books and shared address books (if you have the edit permission).

✓ **To add a new contact, do as follows:**

Step 1: Open the **Add Contact** form. There are 2 ways to do this step:

The 1st way: Click the  button on the main tool bar .

The 2nd way: Right click on an address book (for example My Contacts), and select the **Add** item in the menu.

The 3rd way: You can also create a new contact from the Mail portlet (See eXo Mail User Guide for details)

The **Add/Edit Contact** form will appear:

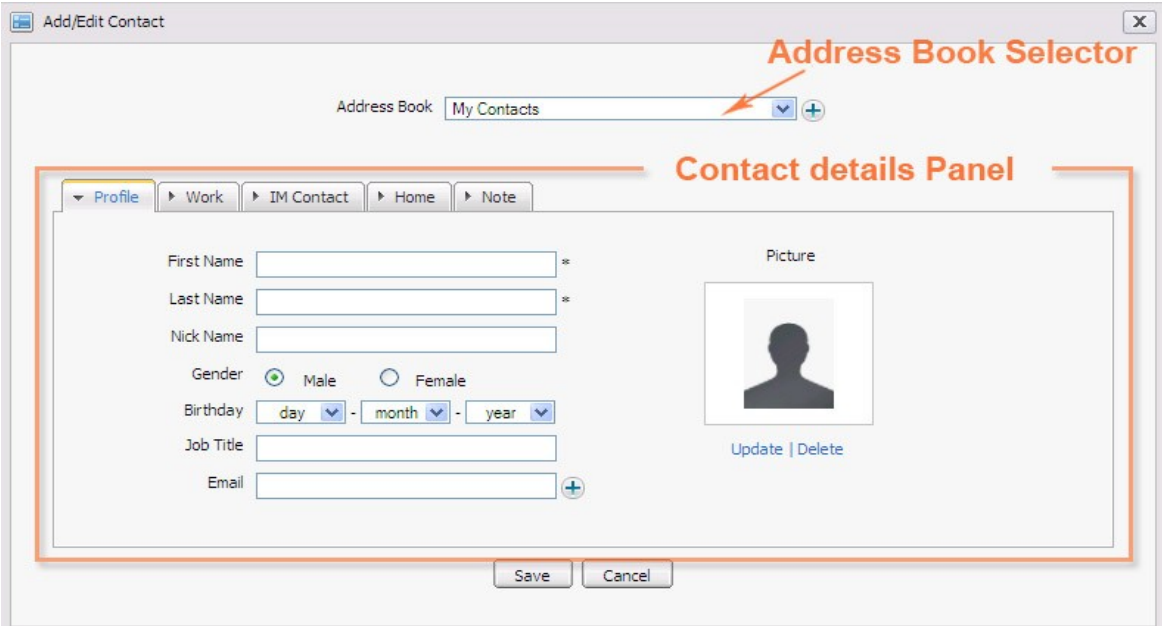



Illustration 13: The Add/Edit Contact form

The **Add/Edit Contact** form consists of the Address Book Selector and the Contact Detail panel:

Address Book Selector

The Address Book Selector allows you to select one from the existing list or quickly create a new address book. To create a new address book, simply click the  icon.

Contact Details Panel

It includes 5 tab: Profile, Work, IM Contact, Home and Note.

Step 2: Input information into the Add/Edit Contact form

Step 3: Click the **Save** button to accept adding a new contact or the **Cancel** button to exit this form without adding.

Details:


- ✓ The **Profile** tab:

The screenshot shows the 'Add/Edit Contact' window with the 'Profile' tab selected. The 'Address Book' dropdown is set to 'My Contacts'. The form fields include: First Name (required), Last Name (required), Nick Name, Gender (radio buttons for Male and Female), Birthday (dropdowns for day, month, and year), Job Title, and Email (with a plus icon to add more). To the right of the form is a 'Picture' section with a placeholder image and 'Update | Delete' links. At the bottom are 'Save' and 'Cancel' buttons.

Illustration 14: The Profile tab of the Add/Edit Contact form

(*) Required

If you want to change picture (avatar) for the contact, click the **Update** link to upload photo from your computer. To remove your uploaded image, simply click the **Delete** link below your avatar picture.

The  icon at the **Email** field allows you to adding more email addresses for the contact. When it is clicked, more Email address fields will appear:

The screenshot shows the 'Email' field with two input boxes. To the right of the second box are a trash can icon and a plus icon, indicating the ability to add or remove email addresses.


Add new email address by clicking the  icon or remove by clicking the  icon.

- ✓ The Work tab:

The screenshot shows a web application window titled "Add/Edit Contact". At the top, there is a dropdown menu labeled "Address Book" with "My Contacts" selected. Below this is a tabbed interface with five tabs: "Profile", "Work" (which is selected and highlighted in blue), "IM Contact", "Home", and "Note". The "Work" tab contains a form with the following fields: "Address", "City", "State/Province", "Postal Code", "Country", "Phone", "Phone (secondary)", "Fax", "Mobile", and "Web Page". Each field has a corresponding text input box. At the bottom of the form, there are two buttons: "Save" and "Cancel".

Illustration 15: The Work tab of the Add/Edit Contact form

- ✓ The IM Contact tab contains information about chat nick. (IM stands for instant message).

The default one is eXo Chat. You can click the  icon to chose other kinds of mail service.

The screenshot shows the 'Add/Edit Contact' window with the 'IM Contact' tab selected. At the top, there is a dropdown menu for 'Address Book' set to 'My Contacts' with a plus icon. Below this are five tabs: 'Profile', 'Work', 'IM Contact' (highlighted), 'Home', and 'Note'. The main area contains an 'eXo Chat' label and a text input field. To the right of the input field is a dropdown menu with a plus icon, which is open, showing a list of instant messaging protocols: Google Talk, MSN, AOL/AIM, Yahoo, IRC, Skype, and ICQ. At the bottom are 'Save' and 'Cancel' buttons.

Illustration 16: The IM Contact tab of the Add/Edit Contact form

✓ The Home tab :

The screenshot shows the 'Add/Edit Contact' window with the 'Home' tab selected. The 'Address Book' dropdown remains 'My Contacts'. The tabs are 'Profile', 'Work', 'IM Contact', 'Home' (highlighted), and 'Note'. The main area contains a vertical list of form fields: Address, City, State/Province, Postal Code, Country, Phone, Phone (secondary), Fax, and Website. Each field has a corresponding text input box. At the bottom are 'Save' and 'Cancel' buttons.

Illustration 17: The Home tab of the Add/Edit Contact form

- ✓ The **Note** tab:

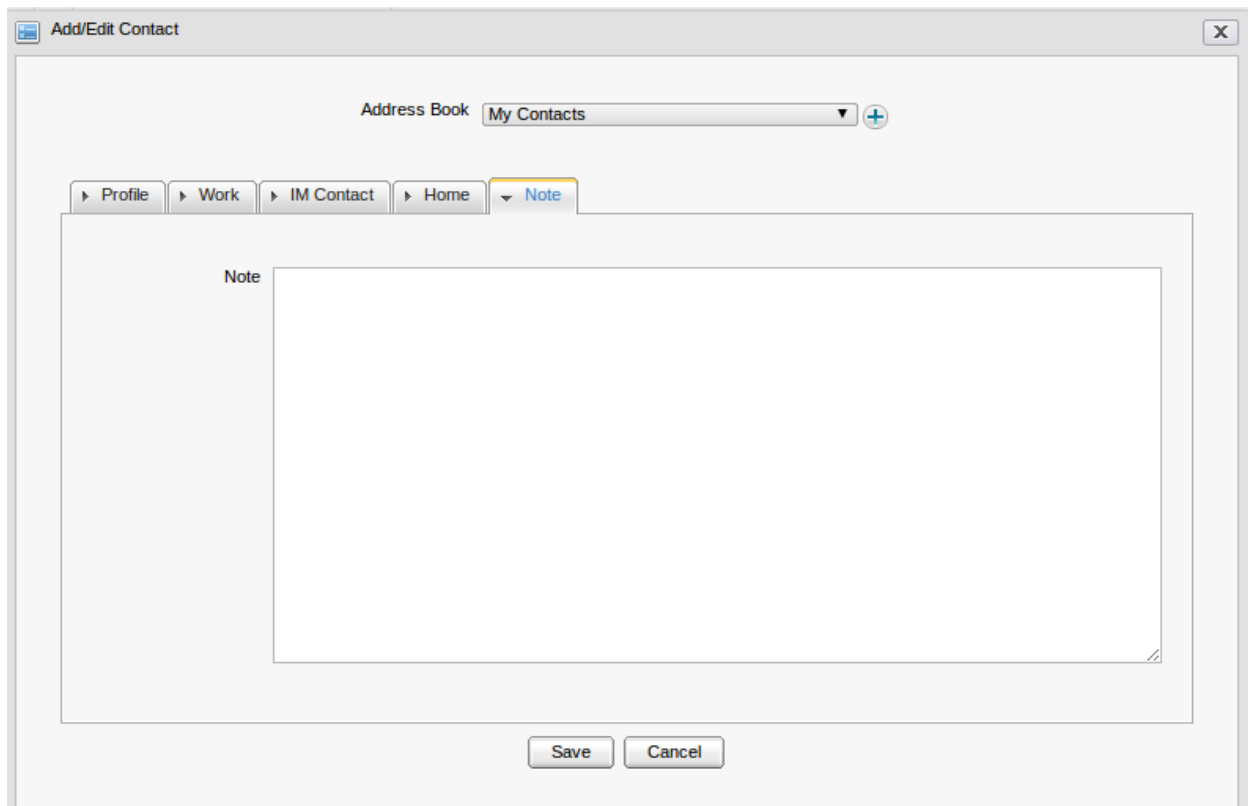
The screenshot shows a web application window titled "Add/Edit Contact". At the top, there is a dropdown menu labeled "Address Book" with "My Contacts" selected and a plus icon to its right. Below this is a horizontal tab bar with five tabs: "Profile", "Work", "IM Contact", "Home", and "Note". The "Note" tab is currently selected and highlighted. The main content area of the "Note" tab contains a large, empty text box for writing a note. At the bottom of the form, there are two buttons: "Save" and "Cancel".

Illustration 18: The Note tab of the Add/Edit Contact form

3.3.3 Edit a contact

This function allows you to make changes to the selected contacts. You can only edit a contact of the personal or shared address books (if you have edit permission).

- ✓ **To edit a contact, do as follows:**

Step 1: Right click on an available contact in list, and then select **Edit** in the drop list menu.

The **Edit Contact** form will appear with full fill information, available for editing:

The screenshot shows a web application window titled "Add/Edit Contact". At the top, there's a dropdown menu for "Address Book" set to "My Contacts". Below this are tabs for "Profile", "Work", "IM Contact", "Home", and "Note", with "Profile" selected. The form contains several input fields: "First Name" (Matthew), "Last Name" (Pette), "Nick Name" (empty), "Gender" (radio buttons for Male and Female, with Male selected), "Birthday" (date picker showing 15/6/1966), "Job Title" (Admin), and "Email" (mattpett@localhost). To the right of the form is a "Picture" section with a photo of a man and "Update | Delete" links. At the bottom of the form are "Save" and "Cancel" buttons.

Illustration 19: The Add/Edit Contact form with full filled information, available for editing

Step 2: Change information of the current contact. You can change all information, picture of your expected contact its Address book. This field is disabled.

Step 3: Click the **Save** button to accept changes or click the **Cancel** button to cancel this action.



You can also edit an address book from Mail portlet (See eXo Mail User Guide v1.3 for detail)

3.3.4 Delete a contact

This function allows deleting existing contacts. You can only delete a contact of personal or shared address books (if you have edit permission)


There are two ways to delete a contact:

The 1st way:

Step 1: Right click on a contact of address book which is opening and then select **Delete** in the menu.

Step 2: Click the **Delete** button on the confirmation message form to delete the selected contact or click the **Cancel** to quit.

The 2nd way:

Step 1: Select check box(s) in the first column to select one or more contacts and click the **Delete** icon  on the action bar.

Step 2: Click the **Delete** button on the confirmation message form to delete the selected contact(s) or click the **Cancel** to quit.




You can also delete an address book from Mail portlet (See eXo Mail User Guide v1.3 for detail)

3.3.5 Copy/paste a contact

You can copy one or more contacts to another address book:

The 1st way: Right click on a contact/an address book and select **Copy** in the drop list menu:

The 2nd way: Select the contacts that you want to copy by selecting check-box in the first column, and then click the **Copy** icon  on the action bar.

The 3rd way:

Step 1 Right click on an address book which has one or more contacts and select **Copy** in the menu.

Step 2 Select a destination address book for coping your selected contacts by right - clicking on the destination address book and select **Paste** in the drop list menu:



You can copy contacts of all address books but you can only paste contacts into personal and shared address books (if you have edit permission).

3.3.6 Move a contact

This function allows you to move one or more contacts from one address book to another one.

✓ **To move a contact, do as follows:**

Select **Move** function by two ways:

The 1st way: Right click on a contact and select **Move** in the drop list menu

The 2nd way: Select one or more contacts you want to move by selecting check-

box(s) in the first column, and then click the  **Move** icon on the action bar.

The **Move contact** form will appear:

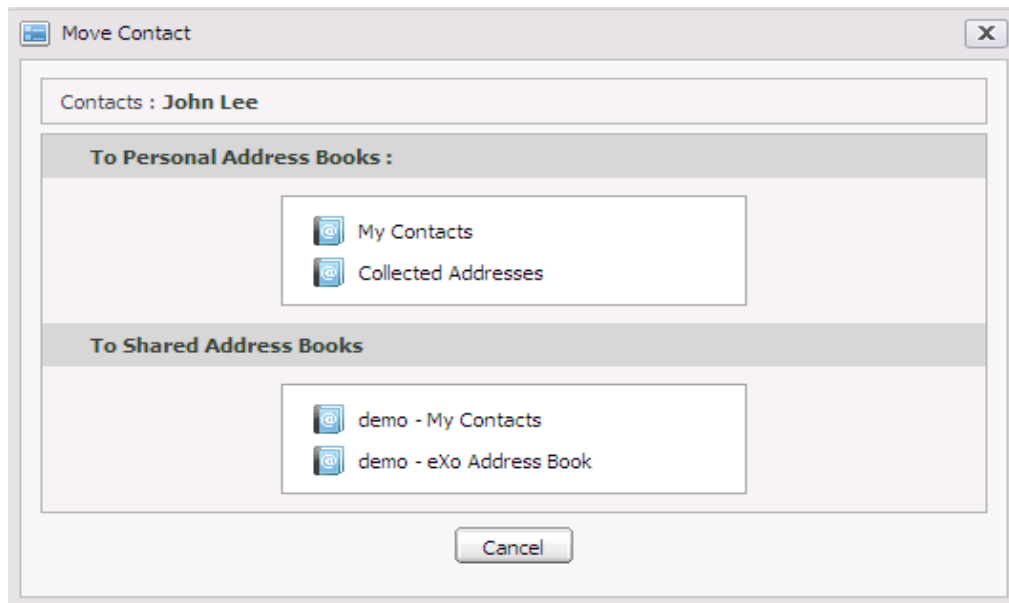
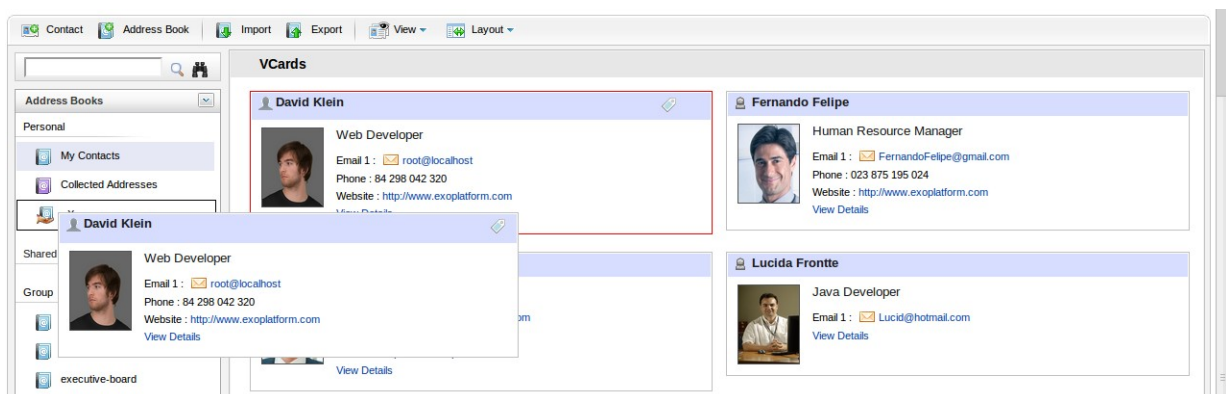


Illustration 20: The Move Contact form

Move contacts by right clicking on the destination address book which you want the contact is moved to. After moving successfully, the form will be automatically closed.

You also can click the **Cancel** button to exit the form without moving.

The 3rd way: Move contacts by using drag and drop feature. You can drag and drop one or more contacts at the same time.



You can only move contacts of personal or shared address book if you have the edit permission. You can not move default contact or contacts in the address book which you do not have edit permission and contacts in public address book.

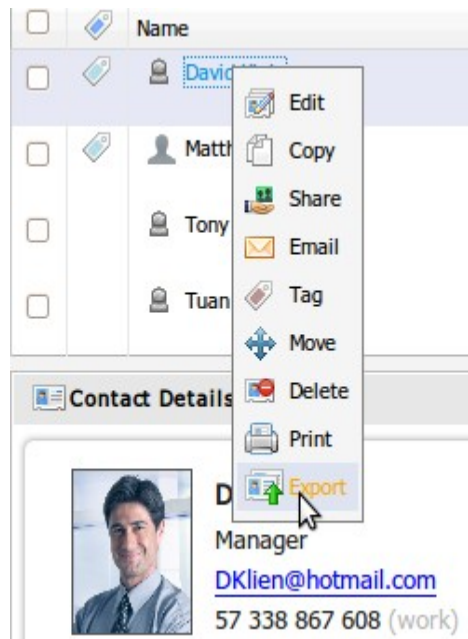
3.3.7 Export contacts

This function allows you to export one or more contacts into a file that can be used in another application.

- ✓ To export a contact, do as follows:

Step 1: Select **Export** function by one of two ways:

The 1st way: Right click on one contact in the contact list and select the **Export** item in the drop list menu:



The 2nd way: Right click on a specific address book name and select the **Export** item in the drop list below:

The **Export Contacts** form will appear:

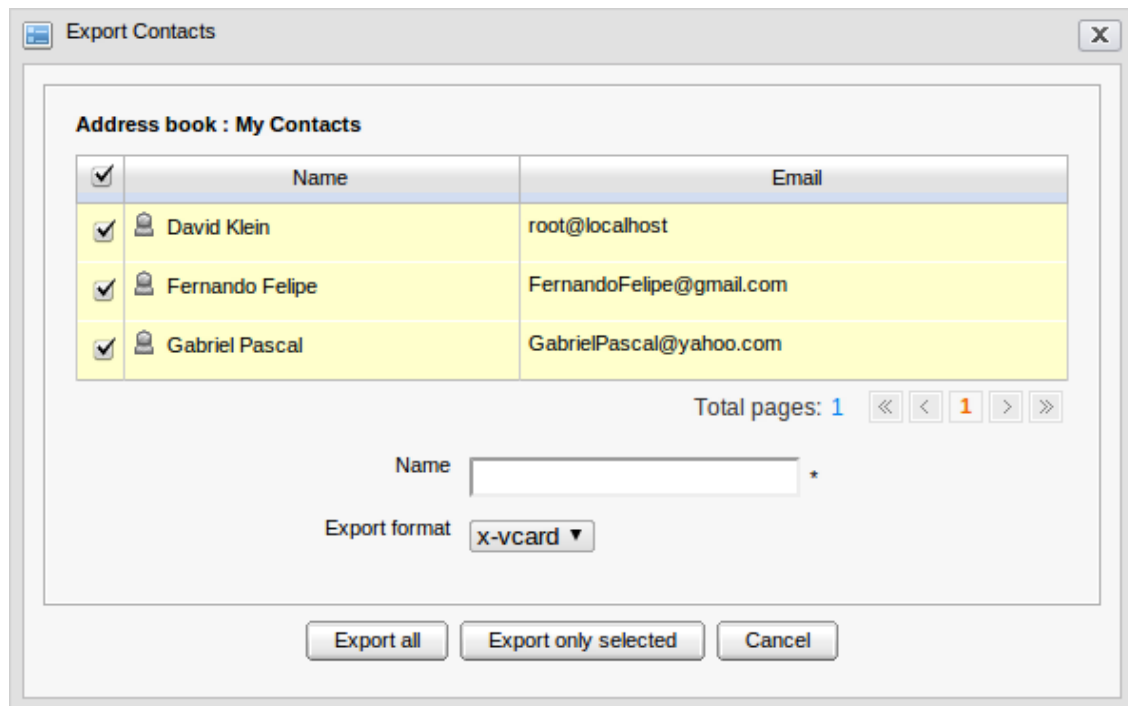


Illustration 21: The Export Contacts form

Step 2: Select one or more contact(s) which you want to export by selecting its check box(s).

Step 3: Enter a file name in the **Name** field and select the export format .(e.g x-card)

Step 4: Click the **Export all** button to export all contacts in all pages, click the **Export only selected** button to export selected contacts or click the **Cancel** button to quit.

A download pop-up window will appear. Depend on what browser you are using, this window can be displayed differently.


3.3.8 Import contacts

This function allows you to import one or more contacts from your computer to a selected address book in eXo Address Book.

✓ **To import contact, do as follows:**

Step 1: Select the **Import** function. There are by 3 ways to do this step:

The 1st way: Click the  **Import** button on the main tool bar.

The 2nd way: Click the  icon on the navigation pane and then select **Import** in the menu:

The 3rd way: Right click on a personal or shared address book which you have edit permission and select **Import** in the drop down list menu:




The **Import contact** form will appear:

Illustration 22: The Import Contacts form

Step 2: Select an address book that you want to import contacts to

Step 3: Select the file format in the **Import format** field. For example: x-vcard

Step 4: Browse to contact file from your computer and click the **Upload** icon  next to the **Browse...** button to upload the selected file.

Step 5: Click the **Save** to accept importing contacts in the selected file or click the **Cancel** to quit.



You can only import contacts to personal or shares address books if you have edit permission.

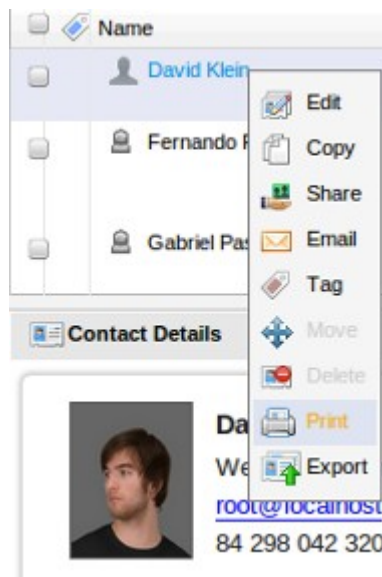
3.3.9 Print contacts

Print function allows you to print information of the selected contacts. You can print one or more contacts at the same time.

- ✓ To print one contact, do as follows:

The 1st way:

Step 1: Right click directly on a contact in the contact list and select **Print** in the menu:



The single contact print preview will appears with the detail information:

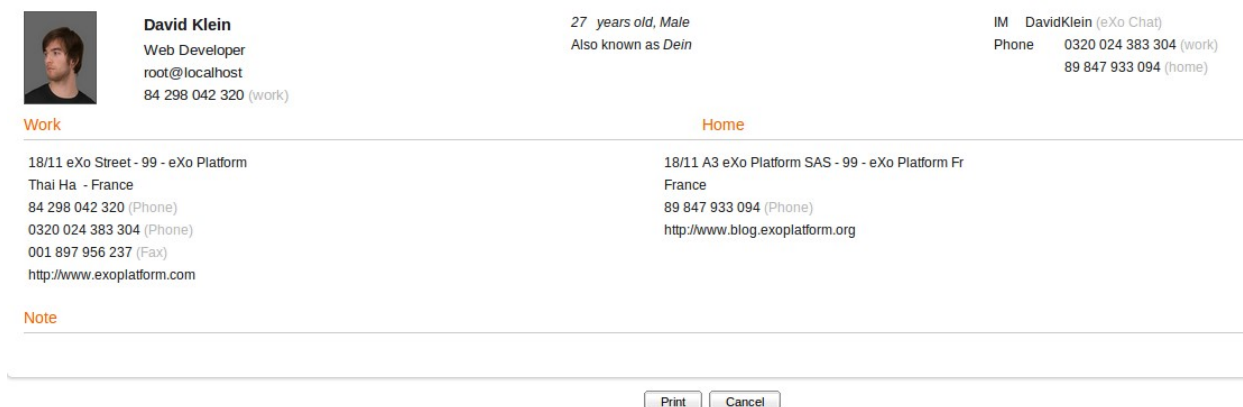
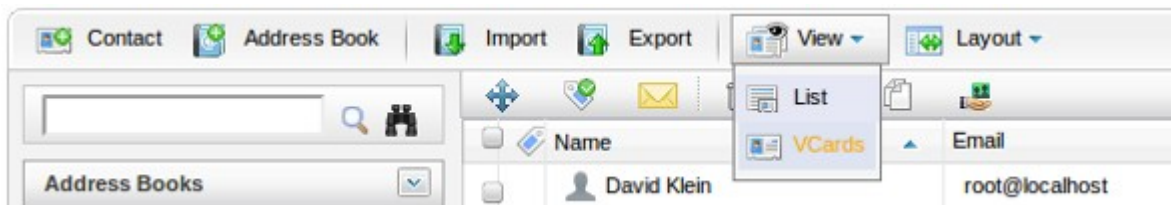


Illustration 23: The Single contact print preview

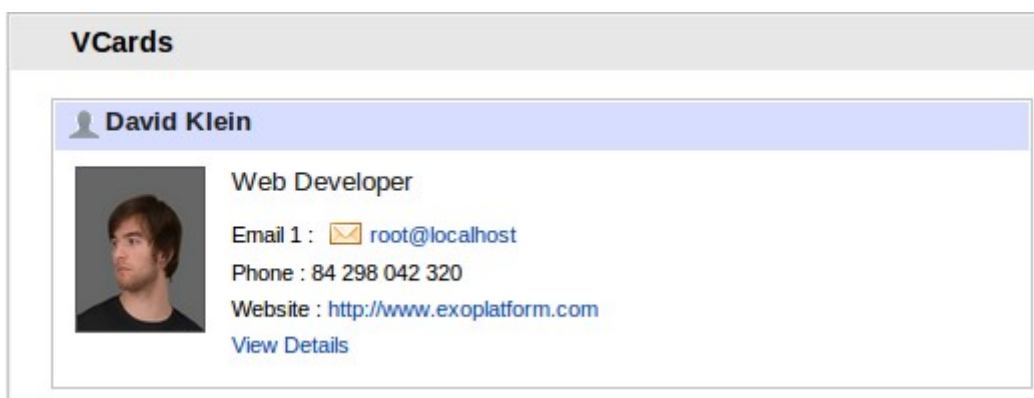
Step 2: Click the **Print** button to continue printing or click the **Close** button to quit the Contact print preview form.

The 2nd way:

Step 1: Click **View** in the main menu, and then select Vcard like below:




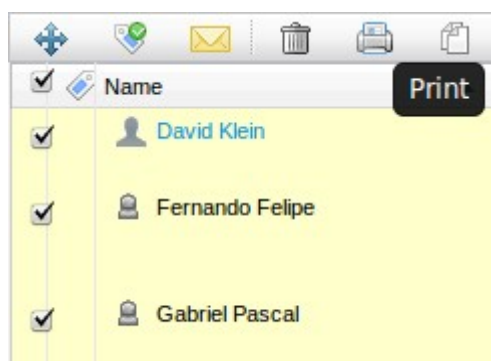
The contacts will be displayed in the Vcard view:



Step 2: Click **View Details** to open the contact in detail pop up. The pop up is shown with **Print Preview** button that allows you to view and print the contact like the 1st way.

✓ **To Print multi-contacts:**

Step 1: Select contact(s) you want to print by selecting its corresponding check box(s) , and then click the **Print** icon  on the action bar:



The multiple contacts print preview will appear with summary information:

VCards



David Klein
Web Developer
Email 1 : root@localhost
Phone : 84 298 042 320
Website : http://www.exoplatform.com



Fernando Felipe
Human Resource Manager
Email 1 : FernandoFelipe@gmail.com
Phone : 023 875 195 024
Website : http://www.exoplatform.com



Gabriel Pascal
Maker
Email 1 : GabrielPascal@yahoo.com
Phone : 084 892 954 039
Website : http://www.exoplatform.com

Print Close

Step 2: Click the **Print** to print selected contact(s) or the **Cancel** to quit without printing.

3.3.10 Share contacts

This function allows you to share contact(s) with one or more users, groups. The shared user/group(s) may have view permission or edit permission on the shared contacts.

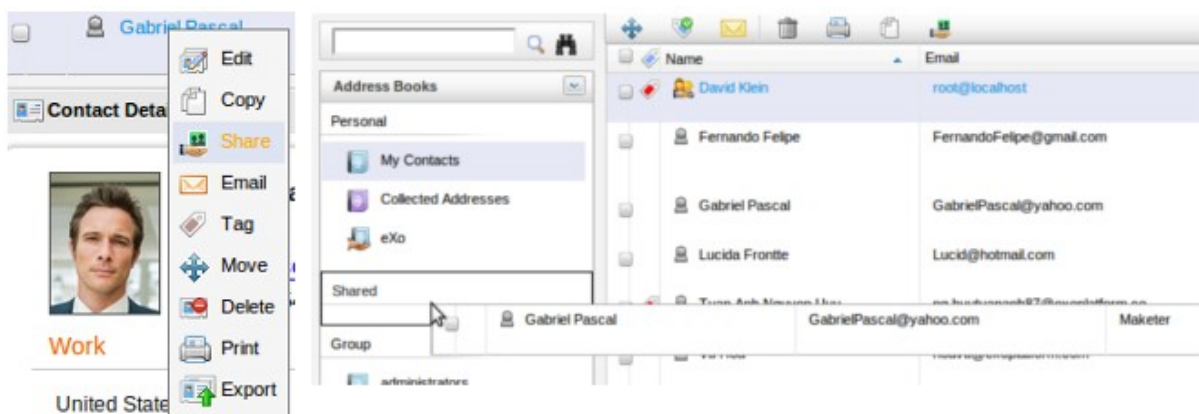
- **View permission** allows other users to view, copy, export, print, move and delete but can not delete your shared contacts. The shared users can not make changes on the information of the shared contacts if they have view permission only. However, they can move and delete shared contacts.
- **Edit permission** allows other users to view, copy, export, print, move and delete and also edit the shared contacts.




The shared users can move or delete the shared contacts from their Address Book only. The original shared contact still exists in the other shared user's contact view. The shared contact is only deleted completely and no longer sharing with all shared if the creator/author of the shared contact removes it.

✓ To share contact with other user:

Step 1: Right click on one contact you want to share and select **Share** in the menu or drag and drop this contact to **Shared Address** book in the **Address Book** panel:



The **Share contact to other users** form will appear:

Step 2: In the **Share contact to other users** form, click the **select user** icon  to open the **User Selector** form:

| | User Name | First Name | Last Name | Email |
|--------------------------|-----------|------------|-----------|----------------|
| <input type="checkbox"/> | demo | Demo | gtn | demo@localhost |
| <input type="checkbox"/> | john | John | Anthony | john@localhost |
| <input type="checkbox"/> | mary | Mary | Kelly | mary@localhost |
| <input type="checkbox"/> | root | Root | Root | root@localhost |


Illustration 24: User selector form

Step 3: Select user(s) by selecting its check box and click the **Add** button.

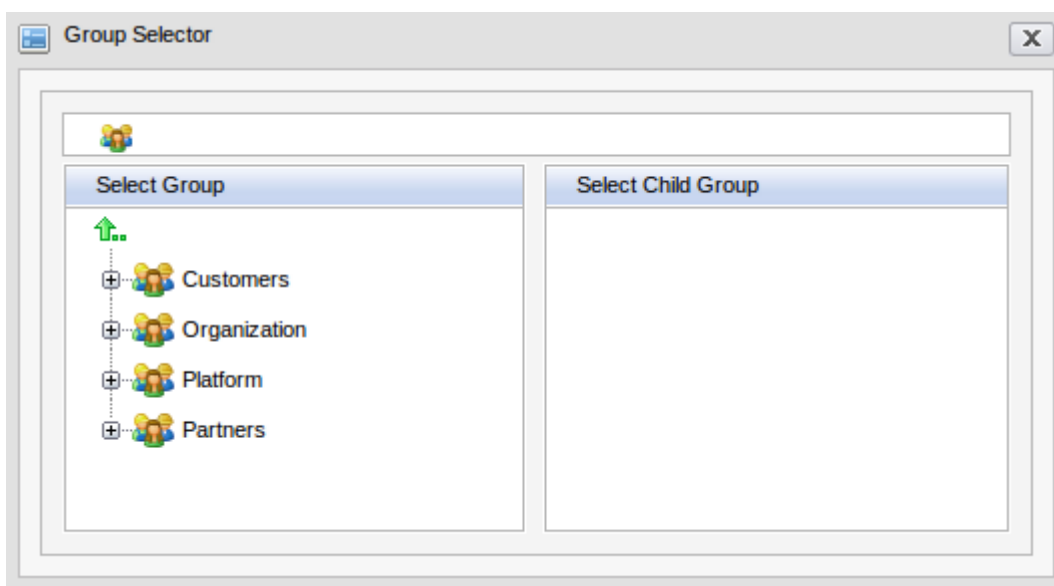
Step 4: Select the 'Can edit?' check box if you want to grant edit permission. User in Group having edit permission can view export, import, add, edit and delete the shared contact while the others do not have edit permission can view and export only.

Click **Save** to share your contact(s) with selected user(s).

✓ **To share a contact with groups:**

Step 1: In the **Share contact** form: click the **select group** icon  by **Group** field.

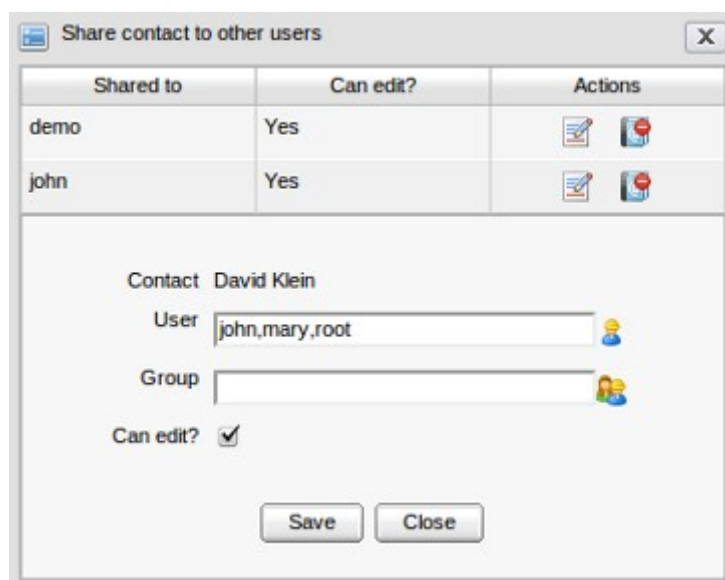
The **Group Selector** form will appear:



Step 2: Select the group path from the left panel. The group corresponding with the path will be shown at the right panel and available for selecting. The selected group will be displayed in the Group field.

Step 3: Click **Save** to accept sharing with the selected users or click **Cancel** to quit.

After sharing, the shared users/groups will be updated into the Share table in the **Share Address book to other users** form :



In the **Actions** column, you can click the icon to change the 'Can edit' right of specific user/group(s) or click the icon to remove specific user/group from the **Share** table. If you want to delete specific user/group, click on the delete icon corresponding to it and select the **OK** on the delete confirmation message.

3.3.11 Send mail to a contact

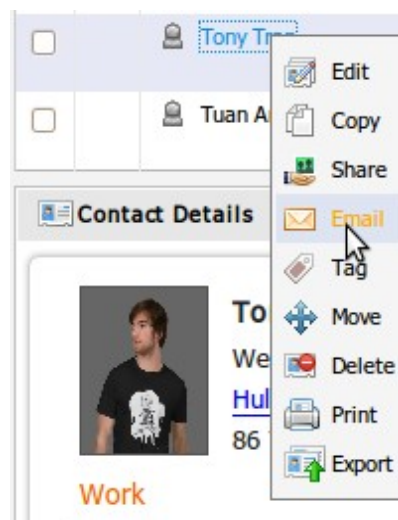
This function allows you to send a mail directly to one or more contacts in your address book. To take this action, you firstly need to:

1. Add at least one account in eXo Mail application (see **eXo Mail User guide** for more details)
2. Have the email address of the contact which you want to send mail.
3. Email address of the selected account will be used to send mail to a contact.

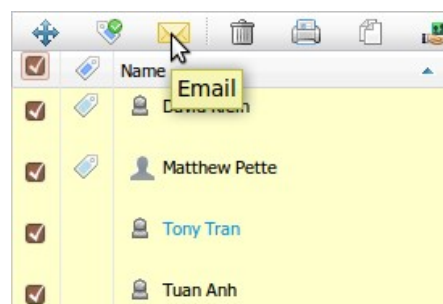
✓ **To send mail to a contact:**

Step 1: Select the **Email** function. You can do this steps in different ways:

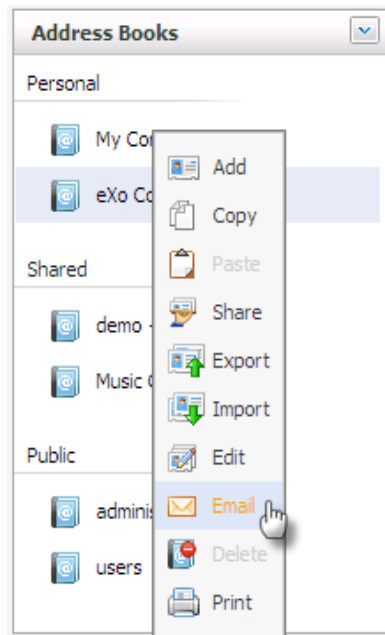
The 1st way: Right click on the contact which you want to send a mail to and select **Email** in the drop down list menu:



The 2nd way: Select the contact(s) that you want to send mail by selecting its check box(s) in the first column, and then click the **Email** icon (✉) on the action bar:



The 3rd way: Right click on the address book and select **Email** in the menu:



The 4th way: Click on email address of a contact when viewing contact in details.

After selecting the Email function, the **Send mail** form will appear:

A screenshot of the 'Send Email' window. At the top, there are two buttons: 'Send Mail' (with a green arrow icon) and 'Discard' (with a red circle icon). Below these are three input fields: 'From' (pre-filled with 'Root Root <root@localhost>'), 'To' (pre-filled with 'GabrielPascal@yahoo.com'), and 'Subject' (empty). Below the fields is a rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Text color (T with a color picker), Background color (a box with a color picker), Bulleted list, Numbered list, Indent, Outdent, Link, and Unlink. To the right of the toolbar are dropdown menus for 'Format', 'Font', and 'Size'. The main area of the window is a large, empty text box for composing the email body.

Illustration 25: The Send mail form

Step 2: Input the receivers' email address.

Besides, the auto complete contacts function allows filtering and listing the receive email address according to your alphabet input.

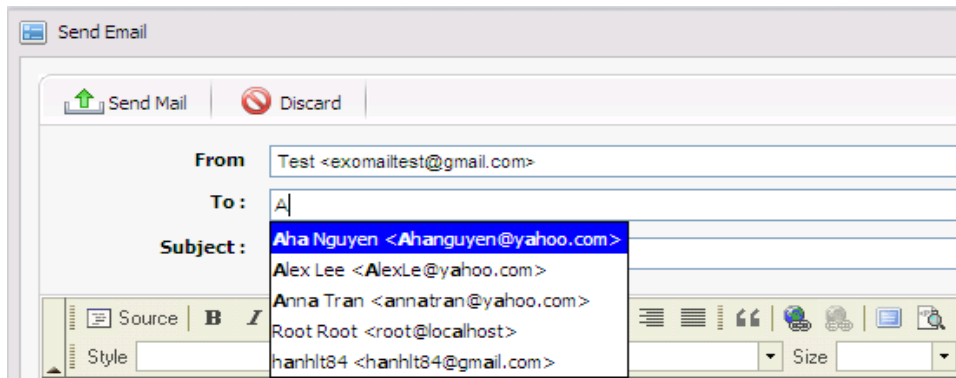


Illustration 26: The auto complete feature

Step 3: Input the subject and the message content.

Step 4: Click the **Send Mail** button to send your message to the selected contacts.

3.3.12 Search contacts

The search contact function allows finding contacts easily and quickly. There are two search types: **Quick search** and **Advanced search**.

3.3.12.1 Quick search

This function allows you to do a quick search with specific keyword in all your contacts. All contacts having text matching with your search term will be displayed in the **Search Result** dialog.

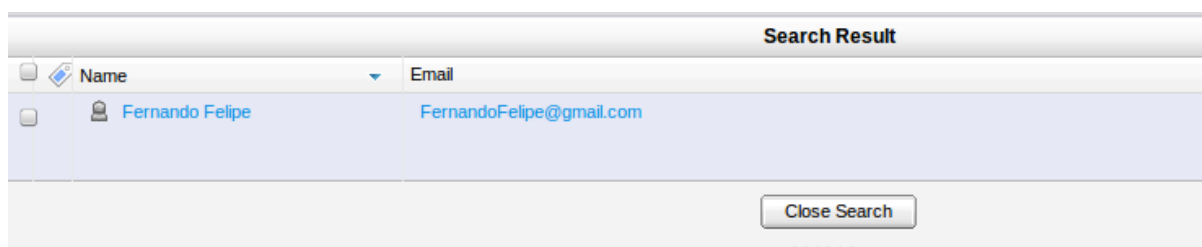
Do as follows:

Step 1: Type search words in the **Search** box :



Step 2: Click the **Search** icon 

The search result(s) will be displayed in the right panel:



3.3.12.2 Advanced search

This function allows you to make a search with multiple criteria, do as follows:

Step 1: Click the **Advanced Search** icon  next to the search box.

The **Advanced Search** form will appear:

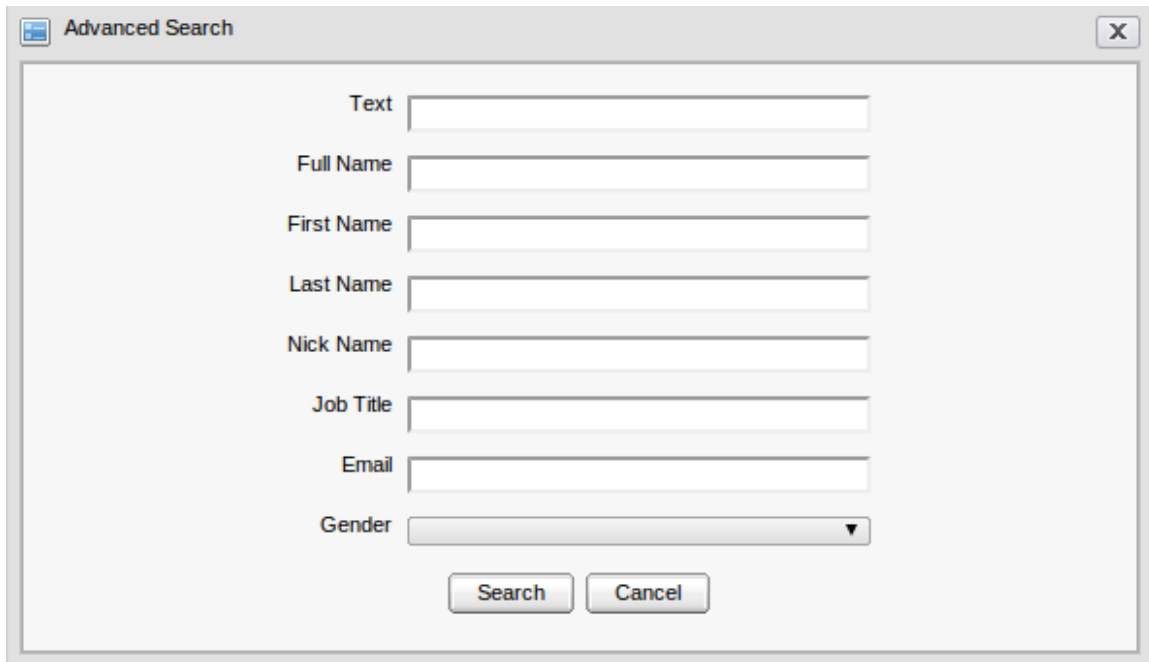


Illustration 27: The Advance Search form

Step 2: In this form, you can set the search criteria by :

- Simple text
- Full name
- First Name
- Last name
- Nick Name
- Job title
- Email
- Gender

Step 3: Click the Search button to do search. All contacts which satisfy your criteria will be listed in the **Search Result** dialog.

3.4 Tag

eXo Address Book allows assigning tags to specific contacts. Tags are used as labels which help you filter or categorize your contacts from different address books. A single contact can be assigned to many tags at a time.


3.4.1 Tag a contact

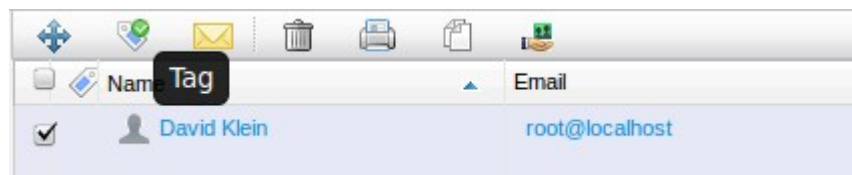
There are several ways to add or remove tags to a contact.

✓ **To tag a contact:**

Select the **Tag** item by one of following ways:

The 1st way: Right click on the contact which you want to tag and select **Tag** in the drop down list menu.

The 2nd way: Select the contact(s) that you want to tag by selecting corresponding check box(s) in the first column, and then click the **Tag** icon  on the action bar.



The 3rd way: Drag and drop contacts to specific tag in the Tag space in the left pane.

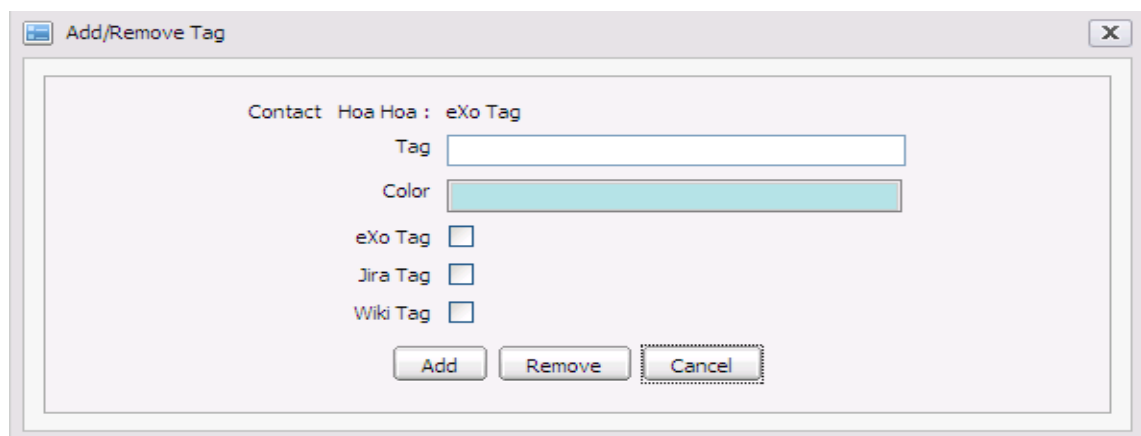
A screenshot of the 'Add/Remove Tag' dialog box. The dialog has a title bar with a close button. Inside, it shows 'Contact Hoa Hoa : eXo Tag'. There are three input fields: 'Tag' (a text box), 'Color' (a color selection box), and 'eXo Tag' (a checkbox). Below these are two more checkboxes: 'Jira Tag' and 'Wiki Tag'. At the bottom, there are three buttons: 'Add', 'Remove', and 'Cancel'.

Illustration 28: The Add/Remove tag form

✓ **To add tag to a contact:**

Step 1: Tag a name.

Step 2: Select color for tag in the drop down list

Step 3: Click the **Add** button to add tag.

✓ **To update contact to an existing tag:**

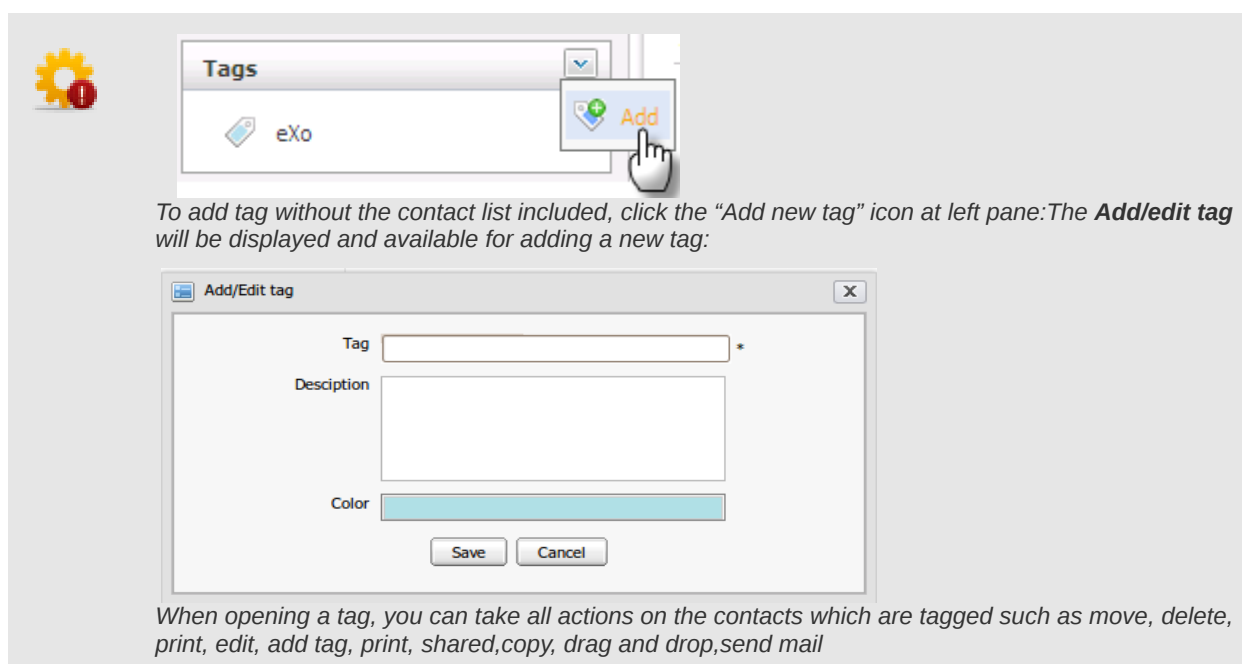
Step 1: Select tags to update by selecting available tag check box in the form

Step 2: Click the **Add** button to add tag.

✓ **To remove tags from a contact:**

Step 1: Select tags to remove by selecting available tag check box(es) in a form

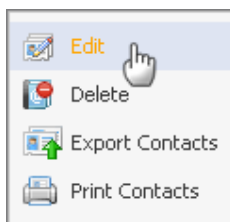
Step 2: Click the **Remove** button to remove selected tag(s).



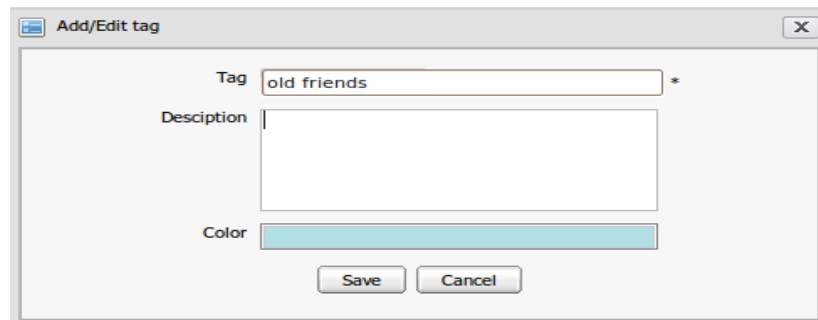
3.4.2 Edit a tag

✓ **To edit a tag, do as follows:**

Step 1: Right click on a tag in tag space and select the **Edit** item in the menu:



The **Edit tag** form will appear:



Step 2: Make changes in the form such as change the Tag name, description, color.

Step 3: Click the **Save** button to accept changes or click the **Cancel** button to quit.

3.4.3 Delete a tag

- ✓ To delete a tag, do as follows:

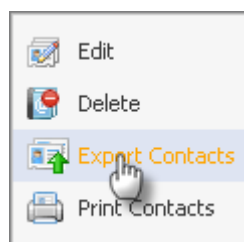
Step 1: Right click on tag name in tag space and select **Delete** item in the menu

Step 2: Click the **OK** button in the confirmation message to accept deleting tag or click the **Cancel** button to quit.

3.4.4 Export contacts in a tag

- ✓ To export contact in tag, do as follows:

Step 1: Right click on a tag and select **Export contact** in the drop list menu:



The **Export Contacts** form will appear:

| | Name | Email |
|--------------------------|---------------|--------------------|
| <input type="checkbox"/> | David Klein | DKlien@hotmail.com |
| <input type="checkbox"/> | Matthew Pette | mattpett@localhost |

Total pages: 1

Name *

Export format **x-vcard**

Illustration 29: The Export Contacts form

Step 2: Select one or more contacts that you want to export by selecting its check box(s)

Step 3: Enter a file name for the **Name** field.

Step 4: Select file format from the Export format combo box (e.g x-vcard)

Step 5: Click **OK** to accept exporting or click the **Cancel** to exit the form.

A download pop-up window will appear. Depend on what browser you are using, this window may display differently.

3.4.5 Print contacts in a tag

This function allows printing all contacts in specific tags.

✓ **To print contacts in one tag, do as follows:**

Step 1: Right click on a tag in the tag space and select **Print contacts** in the drop down list menu.

The contact print preview form appears with details contact information.

Step 2: Click the **Print** button to continue printing or the **Close** button to exit the Contact print view form.

3.5 Change the View type

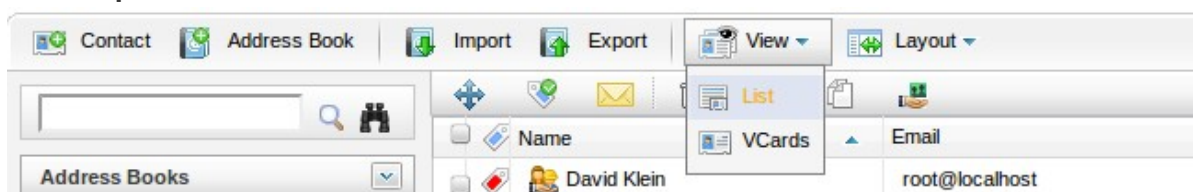
This function allows you to personalize your contact view from many different view types. At present, your contacts can be viewed by List or Vcards.

3.5.1 List View

The list view displays all contacts in the list panel and detail information of the selected contact in Contact view panel.

✓ To view contacts by list view, do as follows:

Step 1 In Main tool bar, click **View** icon and then select **List** in the menu:



The contacts are displayed in the list below:

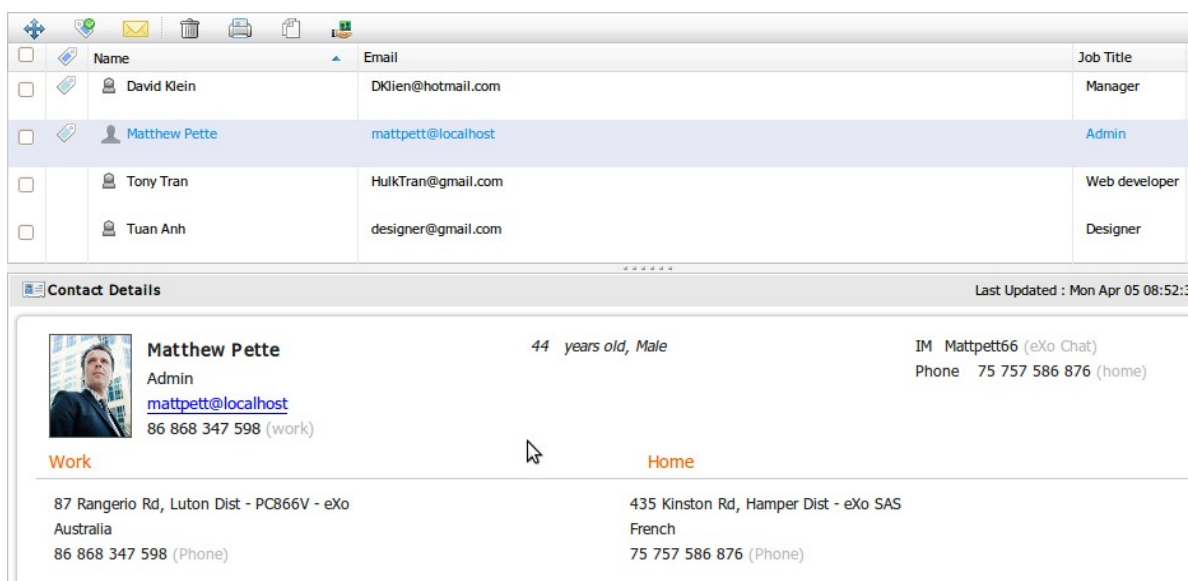
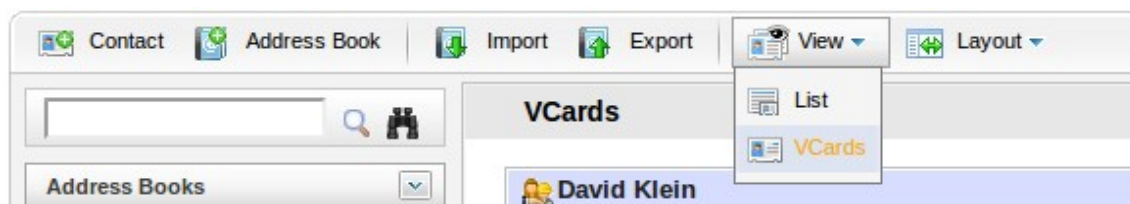


Illustration 30: The List View form

3.5.2 VCards View

The Vcards view displays all contacts in Vcard form, do as follows:

Step 1: On Main tool bar, click the **View** icon and then select **Vcards** in the menu:



The contacts are displayed as Thumbnails:



Illustration 31: The VCards View form

Step 2: You can click the **View Details** to see the contact details in a pop up.

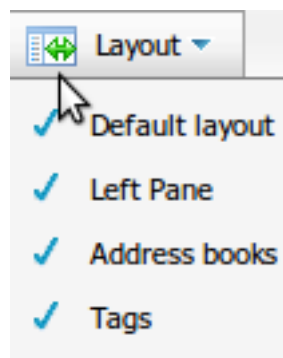
In case the contact is tagged, a tag icon is shown at the right corner that shows all the tags of the contact. You can click on a specific tag in the menu pop up for details.

3.6 Change the Layout

eXo Address Book layout allows you to show or hide many parts of Contact interface.

✓ **To configure layout, do as follows:**

Step 1: On the main tool bar, click the **Layout** icon, and then select an item in the drop down list menu.



Step 2: For example, if you unselect the **Navigation** item in the drop down list menu, the navigation panel in the left area will be hidden.

4 Next Steps

It is our hope that information stated above is valuable to you, our customers and users in the process of experiencing the eXo Address Book . To clearly support for benefits recognition from customers and users, we would like to summarize key features of eXo Address Book as follows:

- **User friendly interface:** Clean, AJAX-enabled UI with drag-and-drop, right-click contextual menus.
- **Unlimited Address Books:** Create multiple private and public address books to group and share contacts more effectively.
- **Sharing:** Share address books or individual contacts with other users or groups.
- **vCard Support::** Import or export contact information from vcard (.vcf) format.
- **Tags:** Keep related groups of contacts organized using tags.
- **Multi-views:** View contacts in list format or as thumbnails.
- **Advanced Search:** Find contacts in address books through an advanced search system.
- **Contact Organization:** Use drag-and-drop features on one or many contacts to organize them by groups, tags and/or address books

eXo Address Book is really the best choice if you want an application that helps you enhance your productivity : sharing, search, tags, vcards and other group actions.It not only helps you schedule your time more quickly and conveniently but also manages your shared and public agendas in the organization efficiently.

Our Company is always willing to receive any feedback, ideas that can make the guide better. Serving and resolving all issues related to the eXo Address Book are our responsibilities, so please post your questions at our forum freely.

This user manual has provided a thorough explanation of features and terminologies within eXo Address Book. Now that you know how to create, manage and share your contacts and address books, you may have more questions or want to get involved in the eXo community. The following links can connect you with resources to learn more and contribute to the open source development process.

- [Learn more about eXo Platform 3.0](#)
- [Video demos, tutorial and more in the eXo Resource Center](#)
- [Access another eXo documents in the eXo Wiki](#)
- [Ask question about eXo Address Book in the Forum](#)