KNOWLEDGE BASE ARTICLE

Employee Actions in Employee Directory: Chat, Call, Email, Copy Email, Schedule a Meeting and vCard

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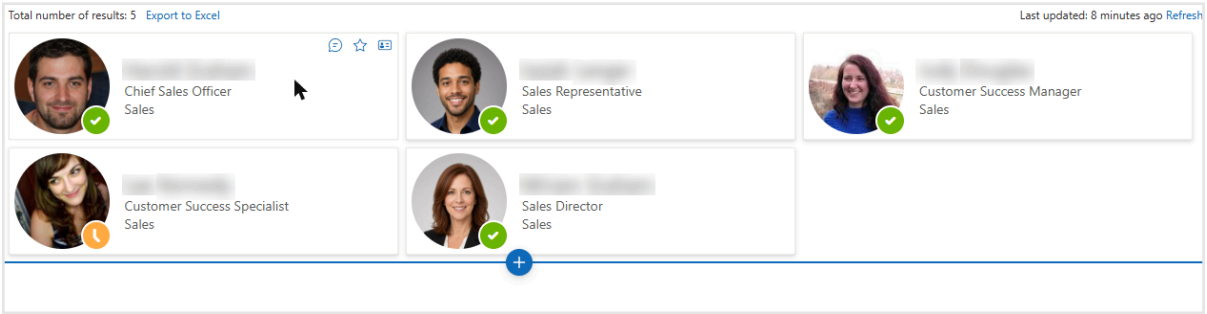
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Every person in the Vitextra Employee Directory web part comes with a set of actions that let you get in touch right away: start a Teams chat or call, write an email, copy the email address, schedule a meeting, or save the person's contact details as a vCard. This article explains what each action does, where you find it, when it is not offered, and how administrators choose which actions are available.

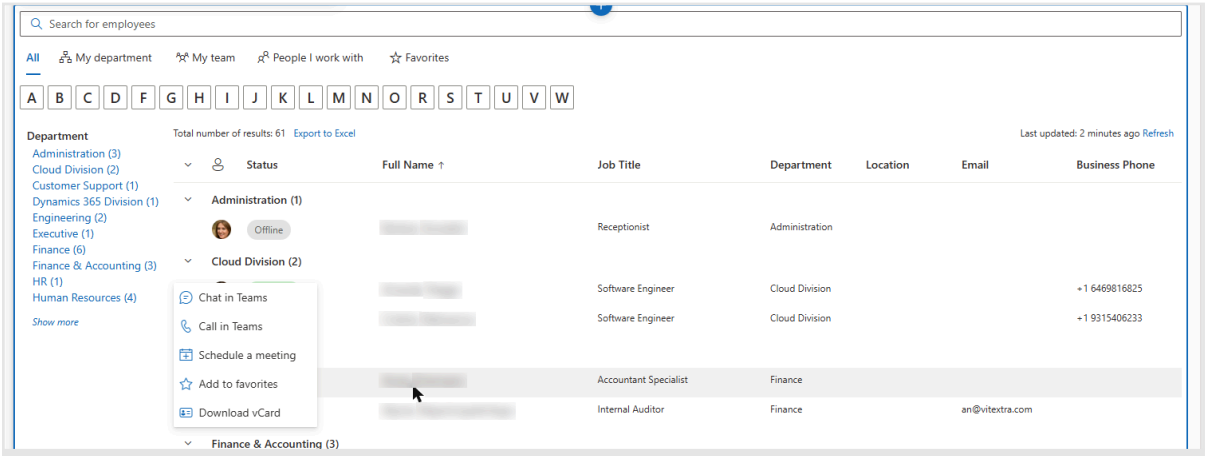
Where actions appear

The same actions are offered in three places. The page author configures quick actions and the context menu separately; the details pane combines the actions enabled in either group.

- **Quick actions on a card.** In the cards **view** (**View** set to **Contact**), hover over a card to reveal a row of small action icons in its top-right corner. Select an icon to run the action without opening the person's details.
- **Context menu.** Right-click a row in the details view, or right-click a card in the cards view, to open a menu with the actions as named commands.
- **Details pane.** When you open a person's details, an action bar with icon buttons appears under the photo, name and job title. It offers every action that is enabled either as a quick action or in the context menu.



Quick actions on an employee card



The context menu of a row in the details view

The actions are available in the **Employee Directory** and **Employee Directory (Entra ID)** web parts, and also in the **New Employees web part** (quick actions and the context menu on its cards; it has no details pane and no favorites).

Note

If no action applies to a person, right-clicking shows your browser's standard menu instead of the Employee Directory context menu.

Available actions

Actions always appear in the same order: Chat, Call, Email, Copy email, Meeting, Favorites, vCard.

Action	What it does	Requires
Chat in Teams	Opens a new **Microsoft Teams** chat with the person.	A Teams address; not shown for yourself
Call in Teams	Starts a Microsoft Teams call with the person.	A Teams address; not shown for yourself
Send E-mail	Opens a new message to the person in your default email app (`mailto:` link).	Work email
Copy e-mail address	Copies the person's work email address to the clipboard.	Work email
Schedule a meeting	Opens the Teams new-meeting form with the person already added as an attendee.	A Teams address; not shown for yourself
Add to favorites / **Remove from favorites**	Adds the person to, or removes them from, your Favorites.	The **Favorites** quick filter enabled
Download vCard	Downloads the person's contact card as a `.vcf` file.	Always available

Chat in Teams and Call in Teams

Chat in Teams and **Call in Teams** use Microsoft Teams deep links (`https://teams.microsoft.com/l/chat/0/0?users=...` and `https://teams.microsoft.com/l/call/0/0?users=...`). The chat opens with an empty message box, ready for you to type.

To address the person in Teams, the web part uses the first value available from the person's profile: the SIP address, then the user principal name (if it has the form of an email address), then the work email.

Send E-mail and Copy e-mail address

Send E-mail opens a `mailto:` link to the person's work email address, so a new message opens in whatever email app is set as the default on your device - for example, Outlook.

Copy e-mail address puts the work email address on the clipboard so you can paste it anywhere - into a form, a document or another app. In the quick actions and in the details pane, the icon briefly turns into a check mark with the tooltip **Copied** to confirm the copy.

Schedule a meeting

Schedule a meeting opens the Microsoft Teams new-meeting form (`https://teams.microsoft.com/l/meeting/new?attendees=...`) with the person already listed as a required attendee. The subject is left empty, and you pick the time and add other attendees in Teams as usual. The attendee is the person's work email address, or their Teams address if no email is available.

Tip

Before scheduling, check when the person is free in the **Availability** section of the details pane. See the KB10199. Employee Directory: Customizing the Details Pane article.

Download vCard

Download vCard saves the person's contact details as a vCard file (`.vcf`) named after the person, which you can import into Outlook, your phone's contacts or any other address book. The file contains the information available in the directory:

- first and last name;
- work email;
- job title and company;
- work address (street, city, state, postal code, country);
- mobile phone and work phones;
- the **About Me** text as a note;
- the profile photo, when one is available.

The action is offered for everyone in the directory. Fields that are empty in the person's profile are simply left out of the file.

The favorites star

When the **Favorites** quick filter is enabled in the web part, a star is added to the actions: **Add to favorites** for people you haven't starred yet and **Remove from favorites** for those you have. On cards, the star of a favorite person stays visible and highlighted even when you are not hovering over the card.

Warning

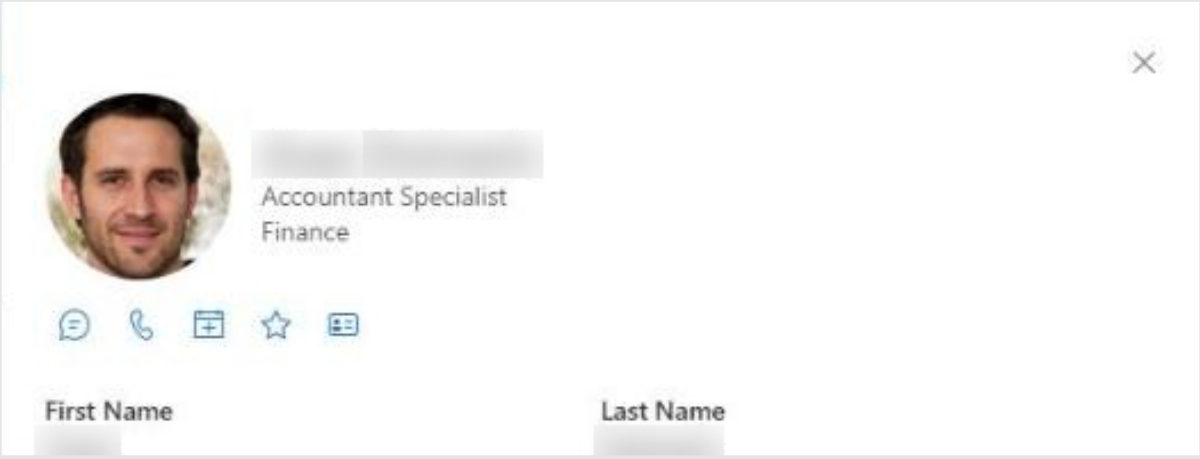
Favorites are stored in your browser's local storage, not in your **Microsoft 365** profile. They are kept per browser and device: they don't follow you to another browser, computer or phone, and they are lost if you clear the browser's **site** data.

For more on the Favorites filter, see the KB10214. Employee Directory Quick Filters: My Department, My Team, People I Work With, Favorites article.

When an action is not shown

An action enabled by the administrator is still hidden for a particular person when it cannot work for that person:

- **No Teams address.** If the profile has no SIP address, no email-like user principal name and no work email, **Chat in Teams**, **Call in Teams** and **Schedule a meeting** are not shown.
- **No work email. Send E-mail** and **Copy e-mail address** are not shown.
- **Your own entry. Chat in Teams**, **Call in Teams** and **Schedule a meeting** are not offered for yourself. Email, copy and vCard actions remain available.
- **Favorites quick filter off.** The favorites star is not shown. The **New Employees** web part never shows it.



The action bar in the details pane

Actions in Microsoft Teams and in the browser

The web part detects whether it runs inside Microsoft Teams (as a **Teams tab** or personal app) or on a **SharePoint** page in the browser, and opens the actions accordingly:

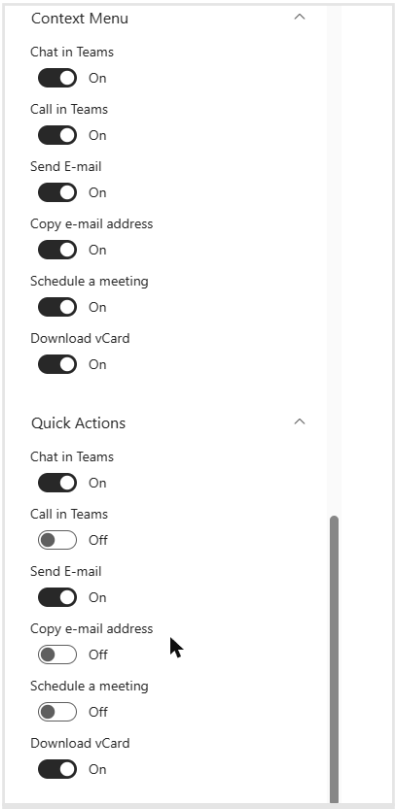
Action	On a SharePoint page in the browser	Inside Microsoft Teams
Chat in Teams, **Call in Teams**, **Schedule a meeting**	Opens the Teams link in a new browser tab; from there Teams opens in the desktop app or on the web.	Opens the chat, call or meeting form directly in Teams, without leaving the app.
Send E-mail	Opens the `mailto:` link, which starts your default email app.	Passes the `mailto:` link to Teams, which opens your default email app.
Copy e-mail address	Copies to the clipboard.	Copies to the clipboard.
Download vCard	Downloads the `.vcf` file.	Downloads the `.vcf` file.

Configuring actions (for administrators)

Page authors decide which actions are available, separately for the quick actions on cards and for the context menu. Edit the page, open the web part's property pane, and use the toggles in two groups:

- **Quick Actions** - the icons that appear when you hover over a card.
- **Context Menu** - the commands in the right-click menu of rows and cards.

Each group contains the same six toggles: **Chat in Teams**, **Call in Teams**, **Send E-mail**, **Copy e-mail address**, **Schedule a meeting** and **Download vCard**. Both groups are available in the **Employee Directory**, **Employee Directory (Entra ID)** and **New Employees** web parts.



The Context Menu and Quick Actions groups in the property pane

When a web part is added to a page, the actions are set as follows:

Action	Quick Actions	Context Menu
Chat in Teams	On	On
Call in Teams	Off	On
Send E-mail	On	On
Copy e-mail address	Off	On
Schedule a meeting	Off	On
Download vCard	Off	On

A few rules worth knowing:

- **The details pane shows the union of both groups.** An action appears in the details

pane action bar if it is enabled in **Quick Actions**, in **Context Menu**, or in both. To remove an action everywhere, turn it off in both groups.

- **The favorites star has no toggle of its own.** It follows the **Favorites** toggle in the **Quick Filters** group: when the Favorites quick filter is on, the star is offered in the quick actions, the context menu and the details pane.
- **Quick actions appear only in the cards view.** The details view has no per-row icons, so there the actions are available through the context menu and the details pane.

Note

Keep the quick actions short. Each enabled quick action adds an icon to the corner of every card, so two or three of the most used actions - for example, chat and email - work best, while the full set stays available in the context menu and the details pane.

Tip

To set up the cards view, card size and card fields, see the KB10314. Employee Directory Layouts: Details and Cards, Card Size, Card Fields and Group By article. For the New Employees web part, see KB10207. How to Showcase New Hires with the New Employees Web Part.

Terms

Microsoft 365
Microsoft 365 is a cloud-based subscription service that combines productivity apps such as Word, Excel, PowerPoint, and Outlook with cloud services such as SharePoint, OneDrive, Teams, and Exchange Online, together with advanced security and device management.

Microsoft Teams
Microsoft Teams is a chat-based collaboration platform for business communications with features for online meetings, live events, and document sharing.

SharePoint
SharePoint is a web-based collaboration platform that provides content management, document management, workflow applications, search, and other tools that empower employees and teams to work together. SharePoint is also a secure place to store, organize, and access shared information.

Site
A SharePoint site is a container for information within the SharePoint platform. Sites typically offer features such as document libraries, lists, calendars, discussion boards, and workflows, facilitating collaboration, communication, and document management within teams or across departments. Sites can be customized and configured to suit the specific needs and workflows of an organization.

Teams Tab
A tab in Microsoft Teams is a page that is embedded in a channel, chat, or meeting and displays web content or an app, such as a SharePoint page or a custom application, at the top of the conversation.

View
A view is a saved configuration that determines which items of a list or library are displayed and how, including the columns, sorting, filtering, grouping, and layout. Views can be personal or public.

Web Part
A web part is a primary building block of functionality or content placed on a

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SharePoint page. Some web parts support customization, such as configuring the web part or changing its appearance.