



People Directory

Installation Manual 2010

Version 2.0.0

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1 Introduction

The People Directory solution enables your business to publish a traditional staff directory in SharePoint. People information is pulled from SharePoint's user profiles which can be populated by the users, Active Directory and/or another line-of-business application.

People Directory displays contact information similar to the traditional staff list and enables users to quickly find people, filtering by first name, last name, department, job title and office using wild. Use partial word filters or the simple letter filters for first name and last name to locate the person or people you're looking for.

The People Directory web part uses online presence information allowing you to see when staff members are online and/or available, plus calendar and location information if Microsoft Exchange Server 2003 or later is being used.

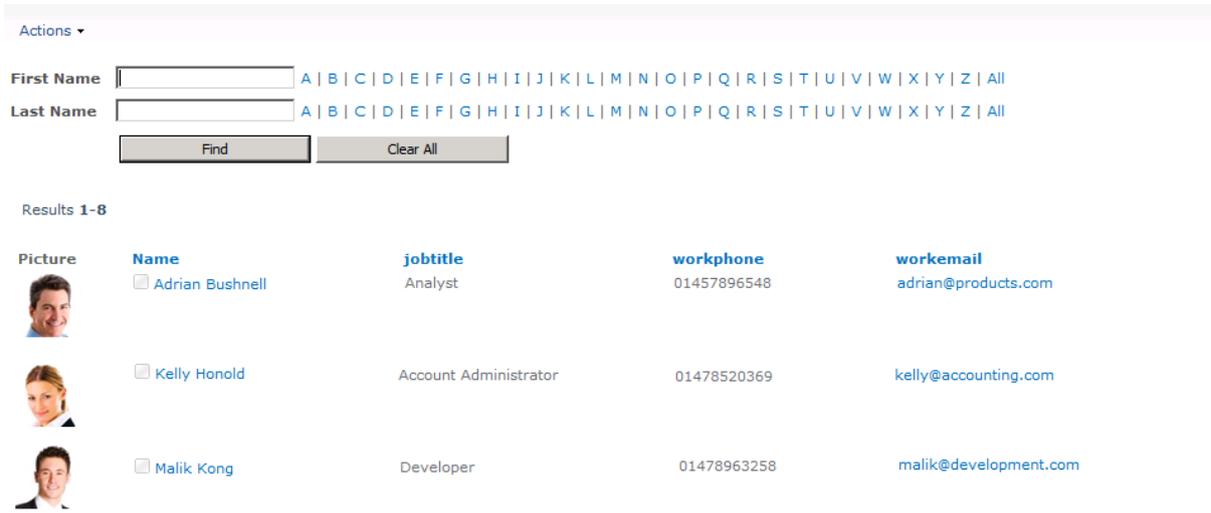


Figure 1 – People Directory

This installation manual is intended for SharePoint Administrators installing the People Directory solution on a Microsoft Office SharePoint 2010 server farm.

2 Installation Requirements

Before proceeding with the People Directory solution installation, please ensure the following requirements are met.

2.1 Recommended Hardware and Software

To increase the performance of People Directory under heavy load, it is recommended to scale up/out your search servers.

Please visit the following location for details:

Microsoft SharePoint Server 2010: <http://technet.microsoft.com/en-us/library/cc262485.aspx>

Microsoft Foundation 2010: <http://technet.microsoft.com/en-us/library/cc288751.aspx>

2.2 Permissions

The following permissions are required to complete all the steps outlined in this installation manual.

- Installation account will need to be a member of the local administrators group on the server where the setup wizard is run with permissions to the Config Database.
Required to complete the installation only.
- The application pool account will need Connect and Execute permissions on the SQL Search databases.
Required to configure views.
- Farm Administrator with rights to add solutions and manage solutions deployment.
Required during installation and to upload/manage license keys in License Manager in order to activate a product licenses.
- SSP Administrator with rights to modify search settings.
Required to create a new Managed Property, initial crawls and update the search scope.
- SSP Administrator with rights to manage user profiles.
Required to create a new Managed Property and import user profiles.
- A site collection administrator on the site collection where the product will be installed.
Required to activate the Site Collection Feature.

3 Pre-Installation

3.1 Enabling Session States

It is recommended that Session States are enabled for People Directory in order to recall modified views. By default, Session States are enabled.

To enable session state across the entire farm

1. On the taskbar, click **Start**, point to **Administrative Tools**, and then click **SharePoint 3.0 Central Administration**.
2. In the top navigation bar, click the **Application Management** tab.
3. On the Application Management page, in the **Office SharePoint Servers Shared Services** section, click **Configure session state**.
4. On the Configure Session State page, in the **Enable Session State** section, select the **Enable Session State** check box to enable session state for the farm.
5. To specify the duration of sessions, in the **Timeout** section, enter a number (in minutes) in the **Session should be timed out after (minutes)** box. The default is 60 minutes.
6. Click **OK** to save the session state configuration.

4 Installing People Directory

This section outlines the procedure for installing People Directory to a single Microsoft Office SharePoint Server 2010

Important: Before proceeding with the installation, please check that the account you are using to install People Directory has the appropriate permissions outlined in section **2.1 – Recommended** Hardware and Software

To increase the performance of People Directory under heavy load, it is recommended to scale up/out your search servers.

Please visit the following location for details:

Microsoft SharePoint Server 2010: <http://technet.microsoft.com/en-us/library/cc262485.aspx>

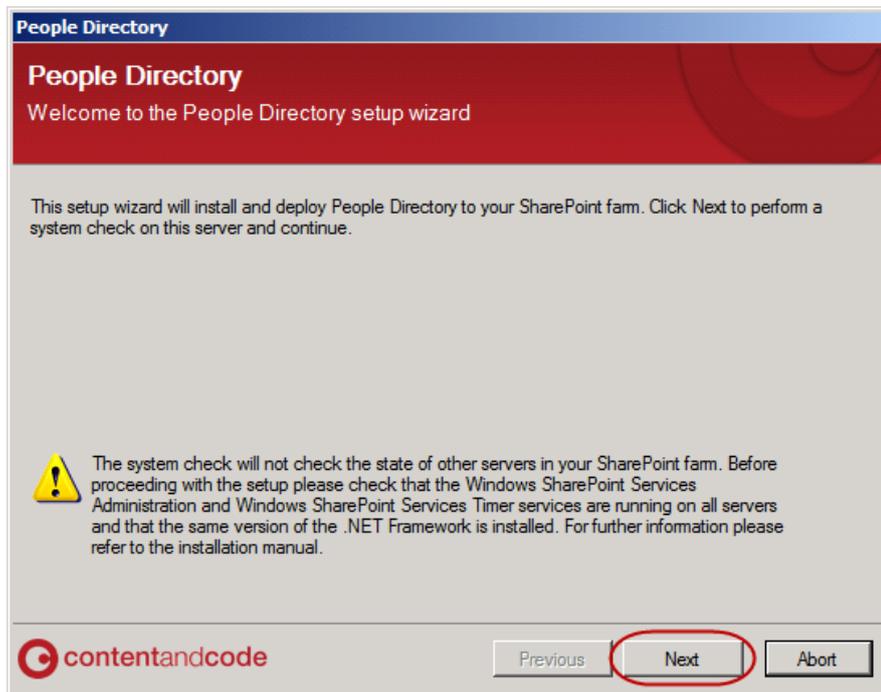
Microsoft Foundation 2010: <http://technet.microsoft.com/en-us/library/cc288751.aspx>

Permissions.

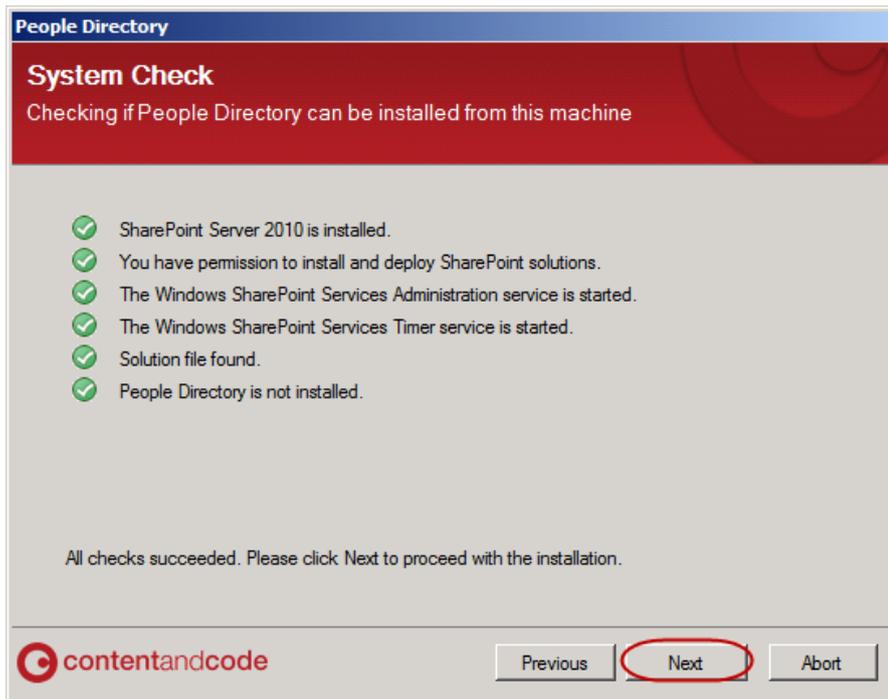
4.1 Deploying the Solution

Follow these steps to install and deploy People Directory to one or more web applications.

1. Open **ccPeopleDirectoryInstaller.exe**



2. Click **Next**



3. The setup will perform a systems check to ensure the server meets the installation requirements. If one of the checks fails, simply abort the installation, and then resolve the issue before running the setup again.

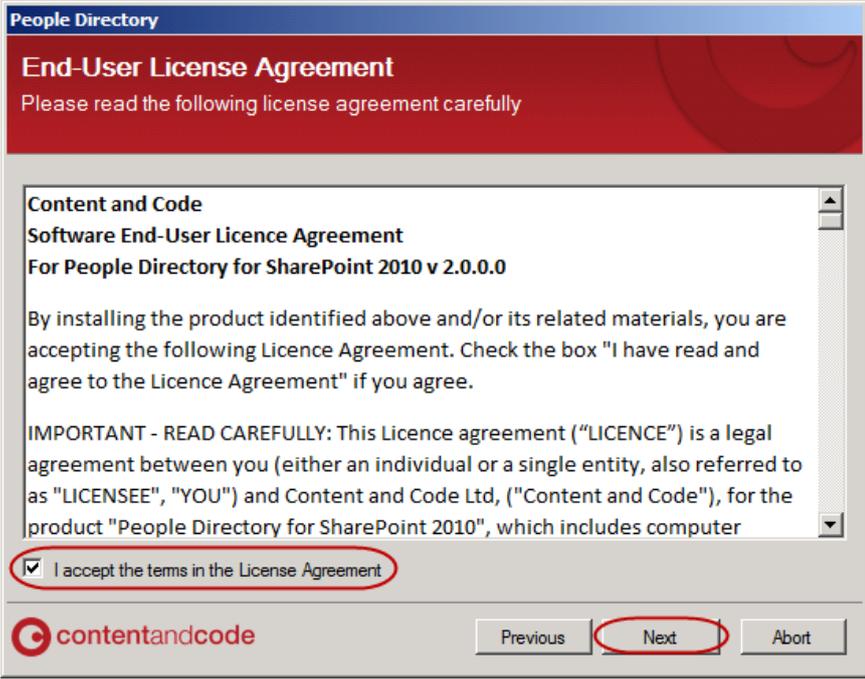
Important: When installing to a SharePoint farm running on **Windows Server 2008** with **User Account Control (UAC) enabled**, the installation permissions must be **elevated** using the Right-click > Run as administrator option (see below)

File Name	Date	Type	Size
1) OxaChart Setup	06/02/2009 15:25	Application	800 KB
Open	5/02/2009 15:28	CONFIG File	1 KB
Run as administrator	1/02/2009 17:59	Text Document	5 KB

Failure to do so will result in a System Check error for the Windows SharePoint Service Timer service check.

4. When the System Check is successfully complete, click **Next**
5. Read and then agree to the terms of the licensing agreement by selecting **I accept the terms in the License Agreement**.

6. Click **Next**



People Directory

End-User License Agreement

Please read the following license agreement carefully

Content and Code
Software End-User Licence Agreement
For People Directory for SharePoint 2010 v 2.0.0.0

By installing the product identified above and/or its related materials, you are accepting the following Licence Agreement. Check the box "I have read and agree to the Licence Agreement" if you agree.

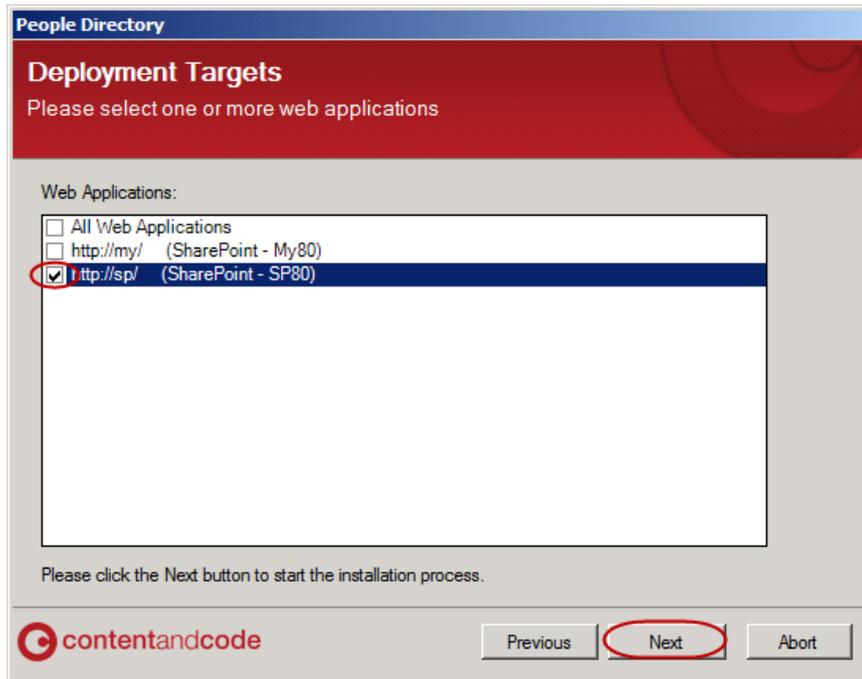
IMPORTANT - READ CAREFULLY: This Licence agreement ("LICENCE") is a legal agreement between you (either an individual or a single entity, also referred to as "LICENSEE", "YOU") and Content and Code Ltd, ("Content and Code"), for the product "People Directory for SharePoint 2010", which includes computer

I accept the terms in the License Agreement

 contentandcode

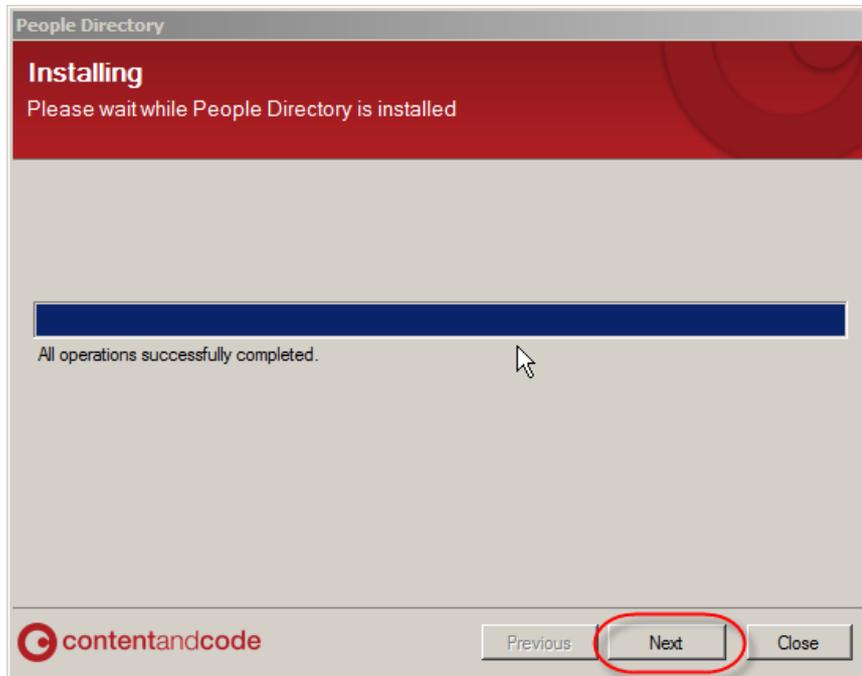
Previous **Next** Abort

7. Select the Web Application where you intend to deploy People Directory.
8. Click **Next**

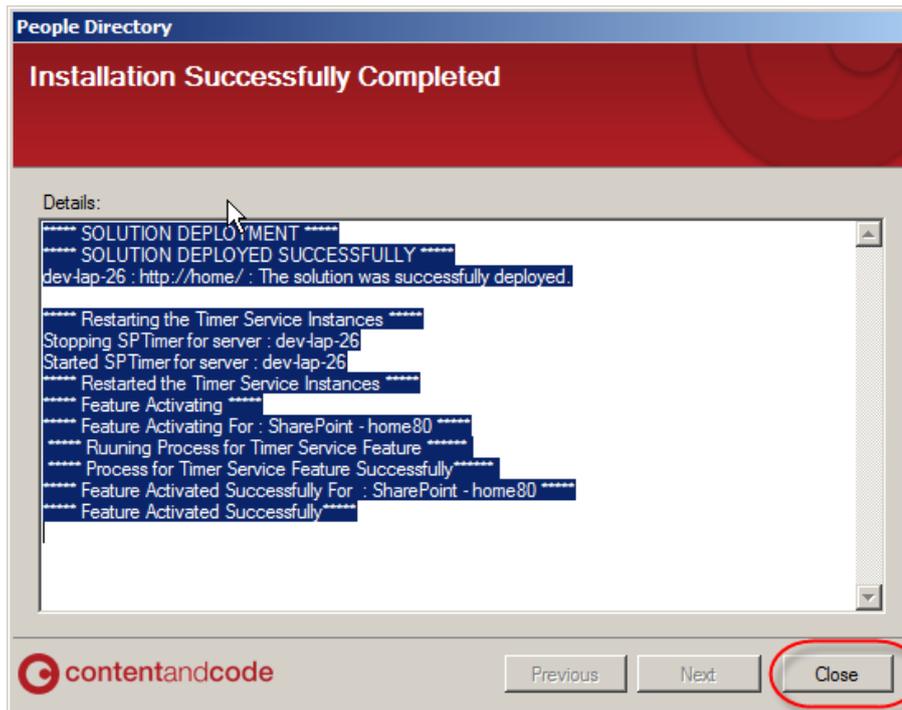


Note: If you need to install People Directory to more than one web application, select multiple web applications.

9. When the installation is complete, click **Next**



10. Click **Close** to complete the installation



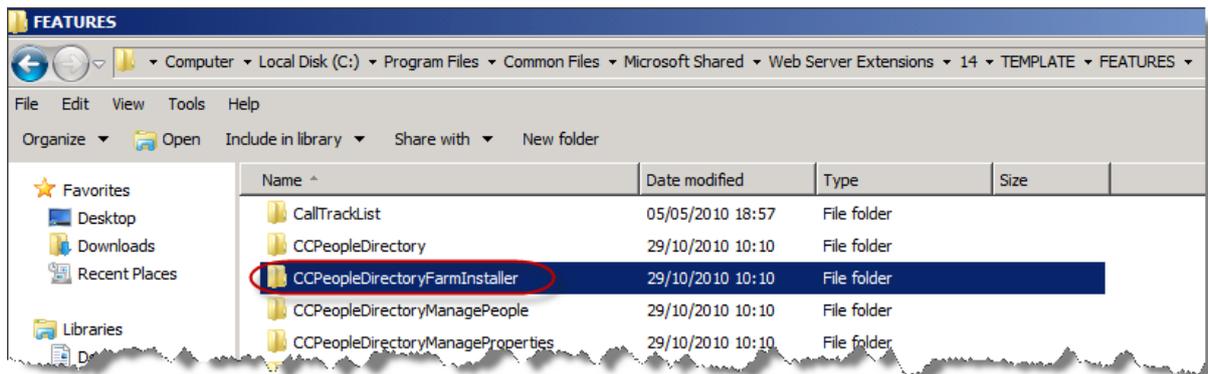
4.2 Copy the Resource Files

Once the installer is complete, the resource files for People Directory may need to be copied to your Virtual Directory. To do this, follow these steps:

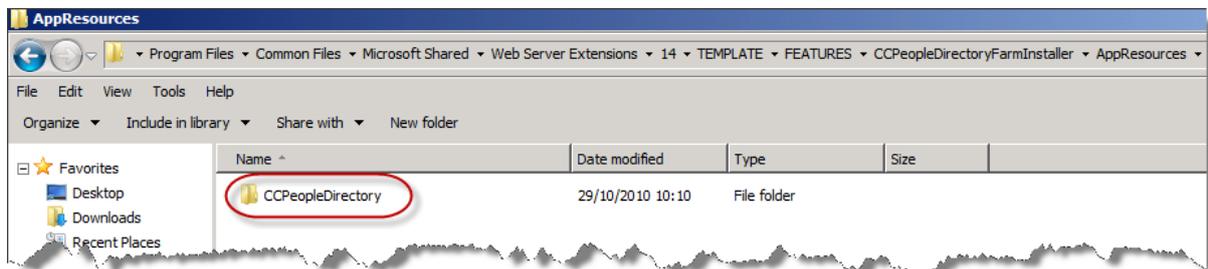
1. Navigate to the following folder:

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\Features

2. Locate the following folder: **CCPeopleDirectoryFarmInstaller**

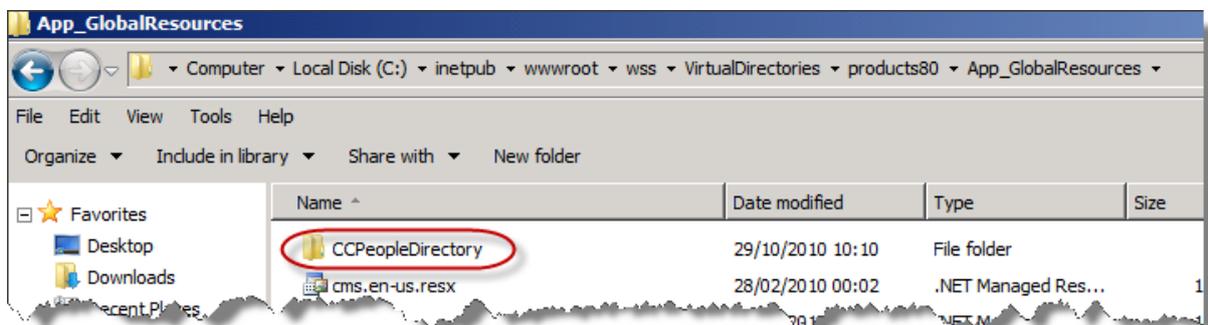


3. Open the folders until reaching **CcPeopleDirectory**



4. Copy the folder **CcPeopleDirectory** and place it in the follow location:

C:\inetpub\wwwroot\wss\VirtualDirectories**Your Web Application here**\App_GlobalResources

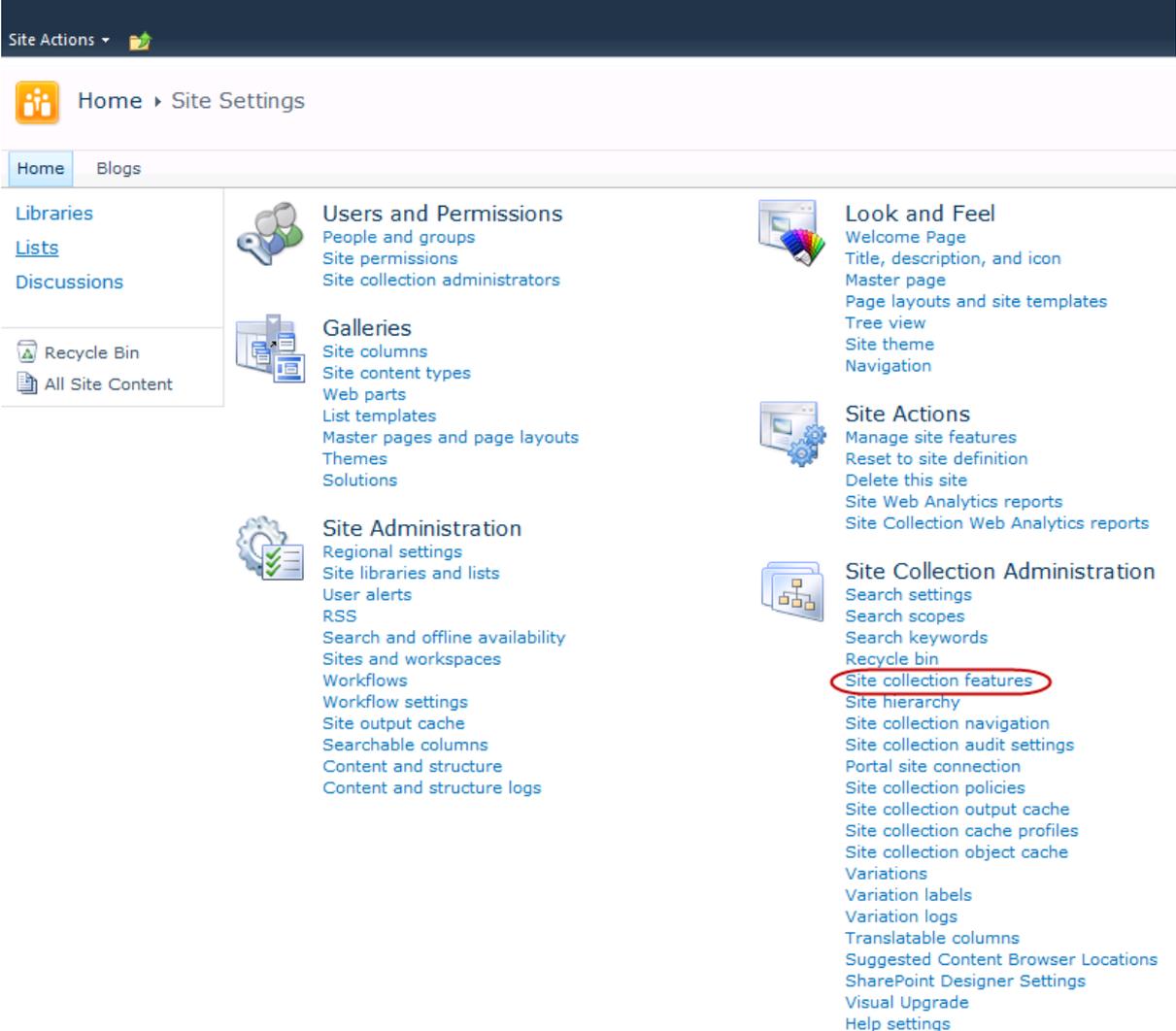


5 Configuring People Directory

5.1 Activate the Site Collection Feature

Follow these steps to activate the People Directory site collection feature.

1. Open the top level site in your site collection.
2. Go to **Site Actions > Site Settings**
3. Under **Site Collection Administration**, click **Site Collection Features**.



The screenshot shows the SharePoint Site Settings page. The breadcrumb navigation is 'Home > Site Settings'. The left sidebar contains 'Libraries', 'Lists', 'Discussions', 'Recycle Bin', and 'All Site Content'. The main content area is divided into several sections:

- Users and Permissions:** People and groups, Site permissions, Site collection administrators.
- Galleries:** Site columns, Site content types, Web parts, List templates, Master pages and page layouts, Themes, Solutions.
- Site Administration:** Regional settings, Site libraries and lists, User alerts, RSS, Search and offline availability, Sites and workspaces, Workflows, Workflow settings, Site output cache, Searchable columns, Content and structure, Content and structure logs.
- Look and Feel:** Welcome Page, Title, description, and icon, Master page, Page layouts and site templates, Tree view, Site theme, Navigation.
- Site Actions:** Manage site features, Reset to site definition, Delete this site, Site Web Analytics reports, Site Collection Web Analytics reports.
- Site Collection Administration:** Search settings, Search scopes, Search keywords, Recycle bin, **Site collection features** (highlighted with a red circle), Site hierarchy, Site collection navigation, Site collection audit settings, Portal site connection, Site collection policies, Site collection output cache, Site collection cache profiles, Site collection object cache, Variations, Variation labels, Variation logs, Translatable columns, Suggested Content Browser Locations, SharePoint Designer Settings, Visual Upgrade, Help settings.

4. Click **Activate People Directory**.



The screenshot shows the 'People Directory' activation dialog. It includes the People Directory icon, the text 'Provides web parts for searching and browsing people information from the User Profile Database', and an 'Activate' button which is highlighted with a red circle.

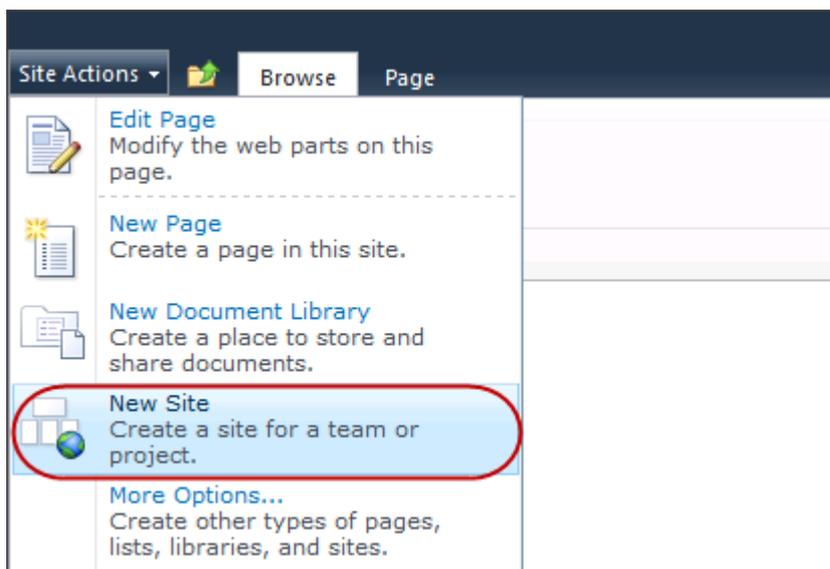
Congratulations!

A Site definition is and the People Directory web parts are now available and ready to use.

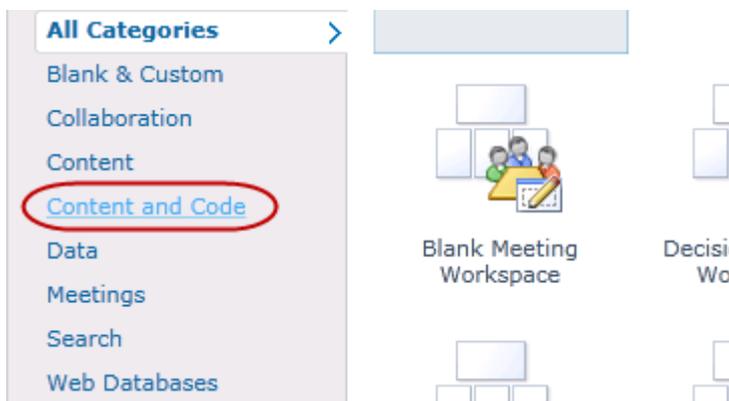
5.2 Create a People Directory Site

Note: If you require People Directory in any other language than English, please follow the instructions in Section 7: Language Packs.

1. Browse to the location where you want to add the People Directory site.
2. From the **Site Actions** click **New Site**.



3. Under **All Categories**, click **Content and Code**



- In the Template section, click **People Directory Site** template.



- Enter a Site Name and URL



People Directory Site

Type: Site
Categories: Content and Code

This template allows to create a site with ready to use People Directory web parts.

http://sp/<URL name>

- Click **Create** and the following screen will appear.

People Directory Home View: Default View

Actions

First Name [A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#) | [All](#)

Last Name [A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#) | [All](#)

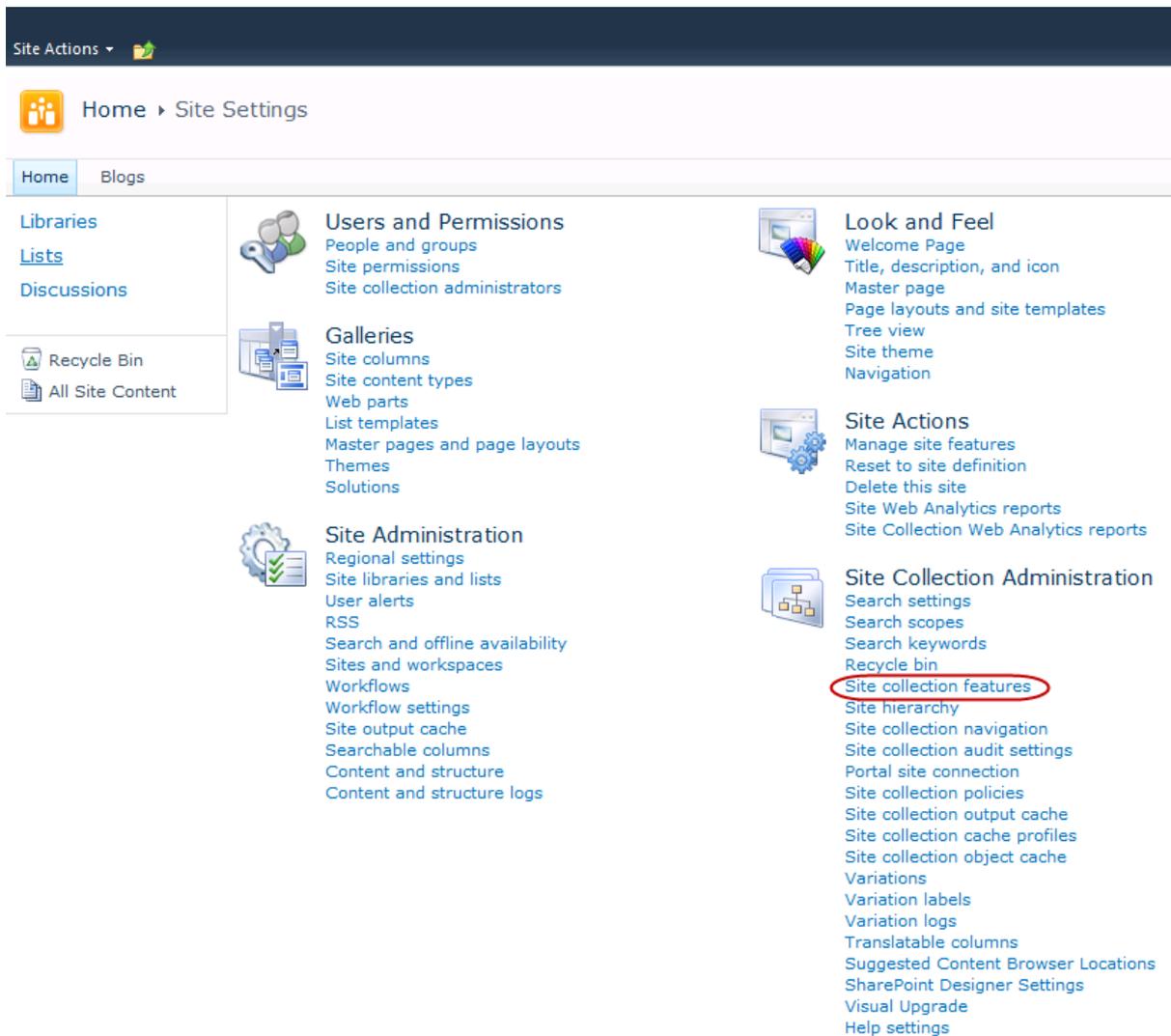
Please select filter options and desired view to get the search results.

6 Uninstalling People Directory

6.1 Deactivate the Feature

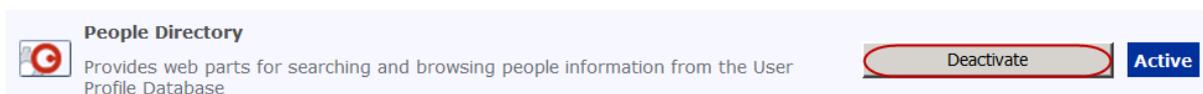
To prevent users from adding additional People Directory web parts to pages, you can deactivate the People Directory. This will remove the web parts from the web part gallery but existing instances (i.e. web parts that have already been added to a page) will continue to function.

1. Open the top level site in your site collection
2. Go to **Site Actions > Site Settings**
3. Below the section **Site Collection Administration**, click **Site Collection Features**



The screenshot shows the SharePoint Site Settings page. The breadcrumb trail is "Home > Site Settings". The left sidebar contains "Libraries", "Lists", "Discussions", "Recycle Bin", and "All Site Content". The main content area is divided into several sections: "Users and Permissions", "Galleries", "Site Administration", "Look and Feel", "Site Actions", and "Site Collection Administration". In the "Site Collection Administration" section, the "Site collection features" link is circled in red.

4. For the People Directory feature, click **Deactivate**



The screenshot shows the "People Directory" feature control. It includes the Content and Code logo, the text "Provides web parts for searching and browsing people information from the User Profile Database", and two buttons: "Deactivate" (highlighted with a red circle) and "Active".

5. When prompted with a warning, click **Deactivate this feature**



You are about to deactivate the People Directory feature.

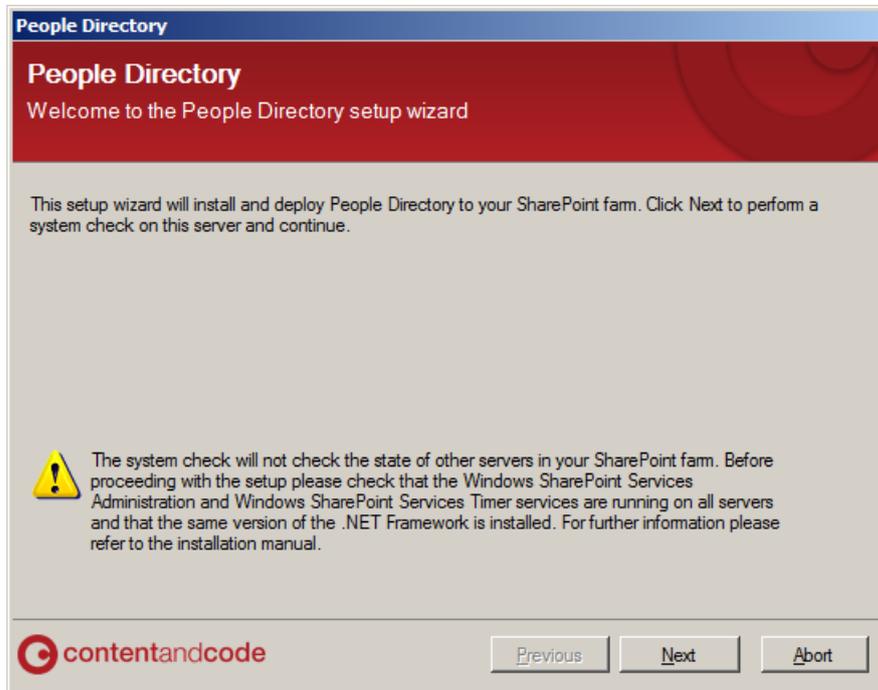
If you deactivate this feature, any user data or customizations associated with this feature might be lost. In addition, any active features that depend on this feature might fail to function.

[Deactivate this feature](#)

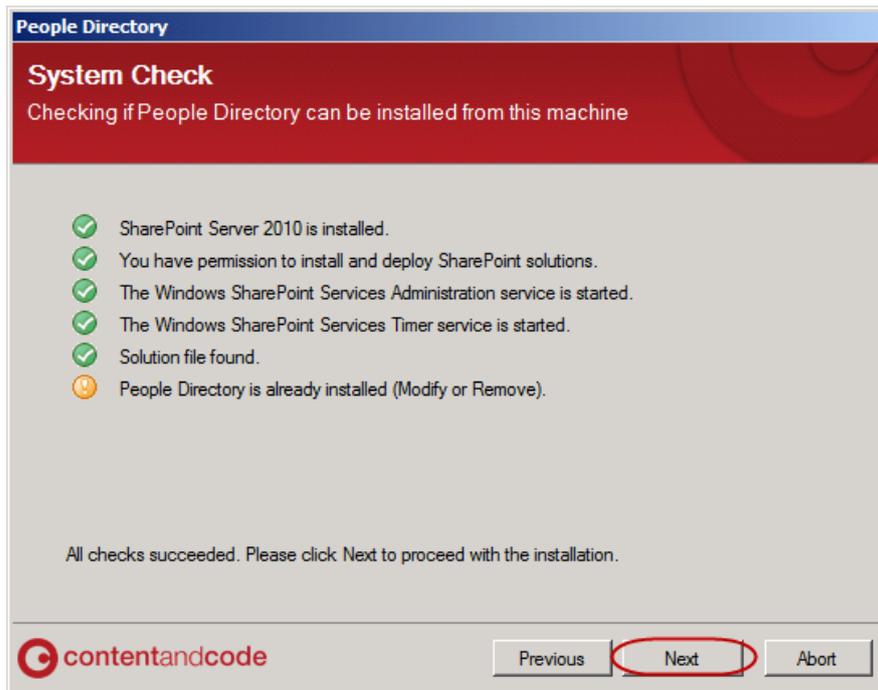
6.2 Uninstall the Solution

To completely un-install People Directory from your farm, log on to the server from which you installed People Directory and locate your installation file and follow these steps.

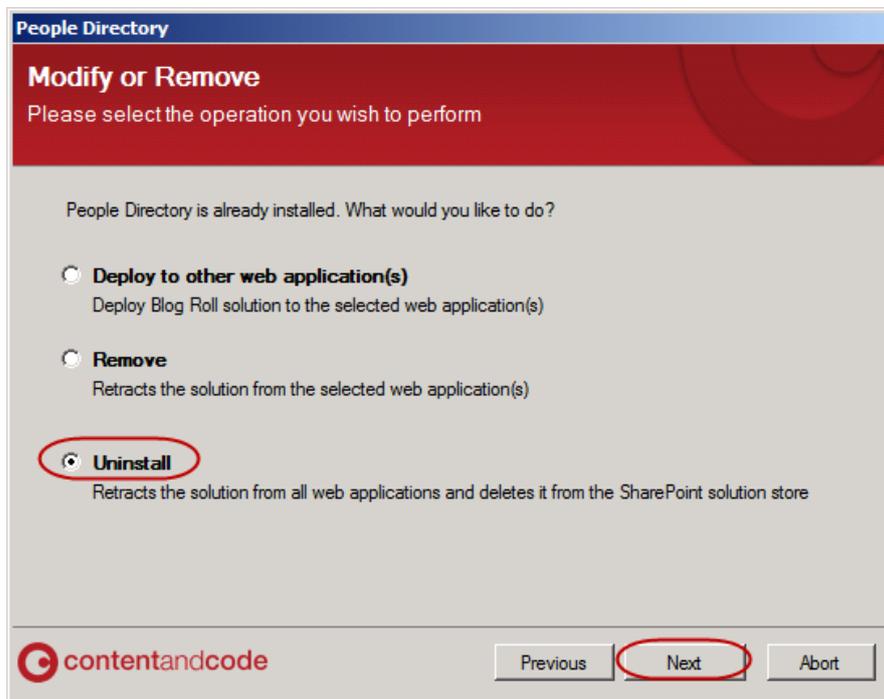
1. Run **ccPeopleDirectoryInstaller.exe**
2. Click **Next**



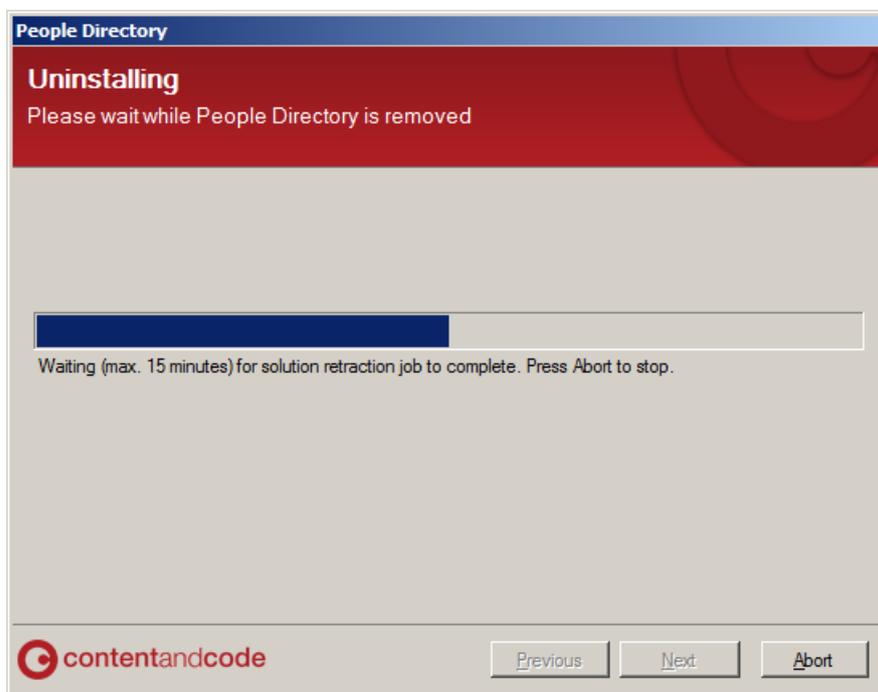
3. Once the System Check is complete, click **Next**



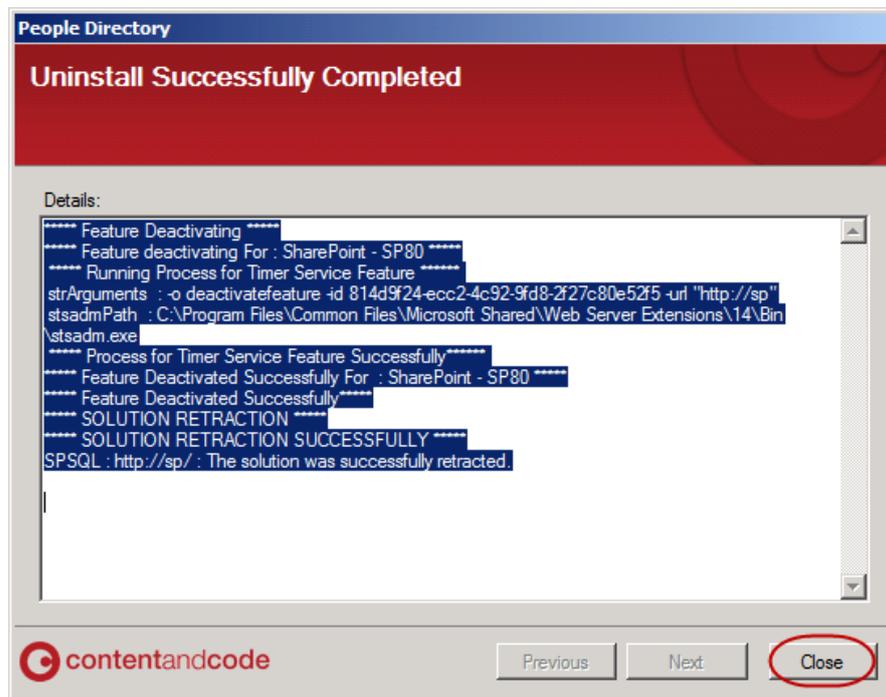
4. Select **Uninstall**
5. Click **Next**



6. Once the uninstall is complete, click **Next**
7. The details of the uninstall procedure will be displayed



8. Click **Close**



Note: Any People Directory web parts that have been added to your site must be deleted manually.

7 Language Packs

If you require People Directory to appear in a different language than English then you will need to install a People Directory language pack.

A list of available language packs for People Directory can be downloaded from the Content and Code People Directory site.

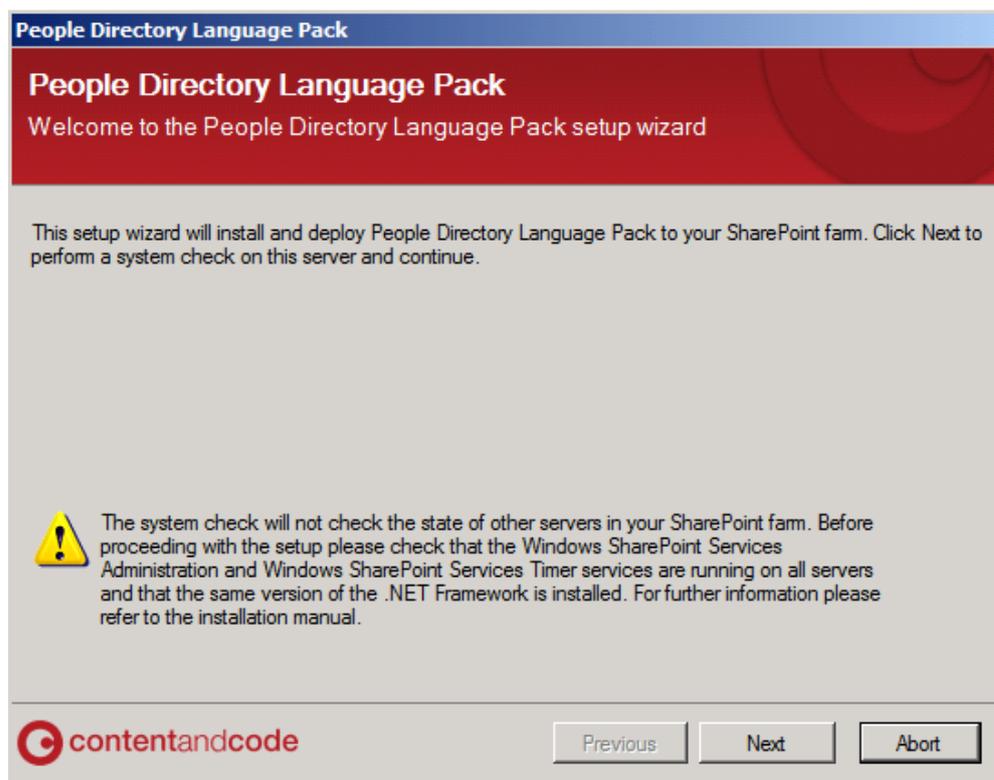
<http://www.contentandcode.com/webparts/PeopleDirectory>

To install a Language Pack follow these steps:

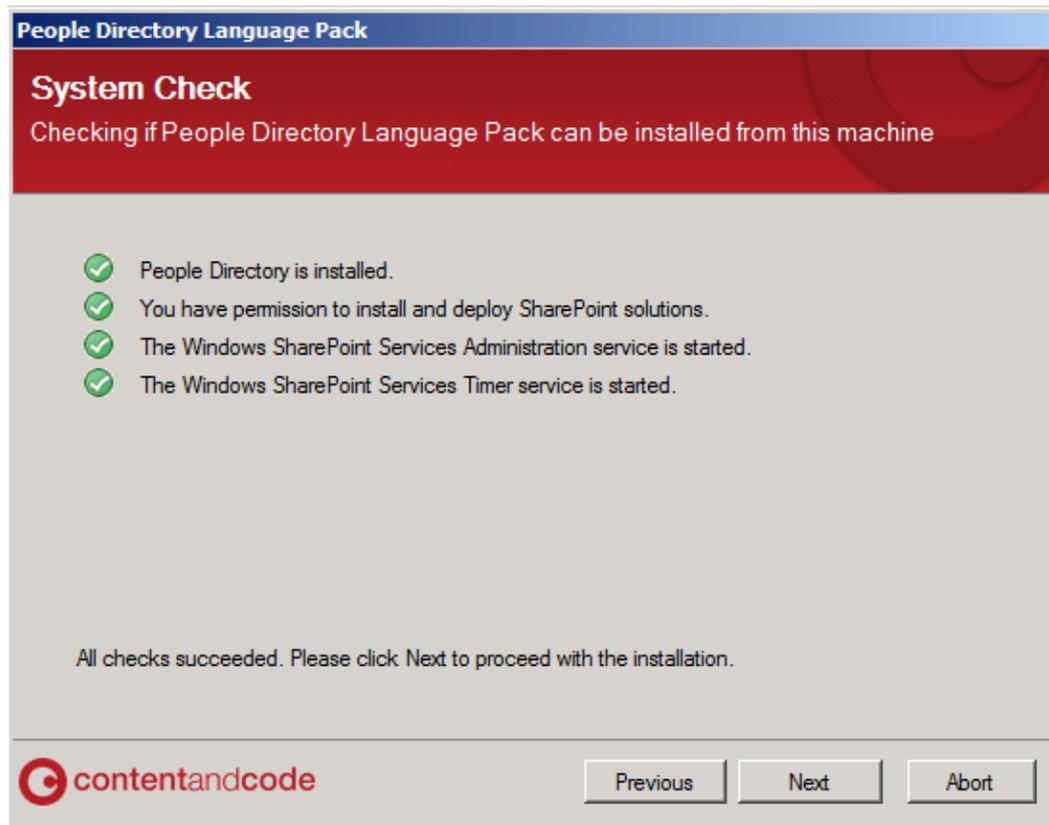
1. Unzip the Language Pack file downloaded from the Content and Code website.

Name	Date modified	Type	Size
Resources	22/09/2009 10:27	File Folder	
CcPeopleDirectoryLanguagePackInstaller	16/09/2009 20:42	Application	167 KB
CcPeopleDirectoryLanguagePackInstall...	16/09/2009 20:00	XML Configuratio...	1 KB
InstallerLog	22/09/2009 10:34	Text Document	2 KB
LanguagePacks	28/08/2009 17:47	XML Document	1 KB

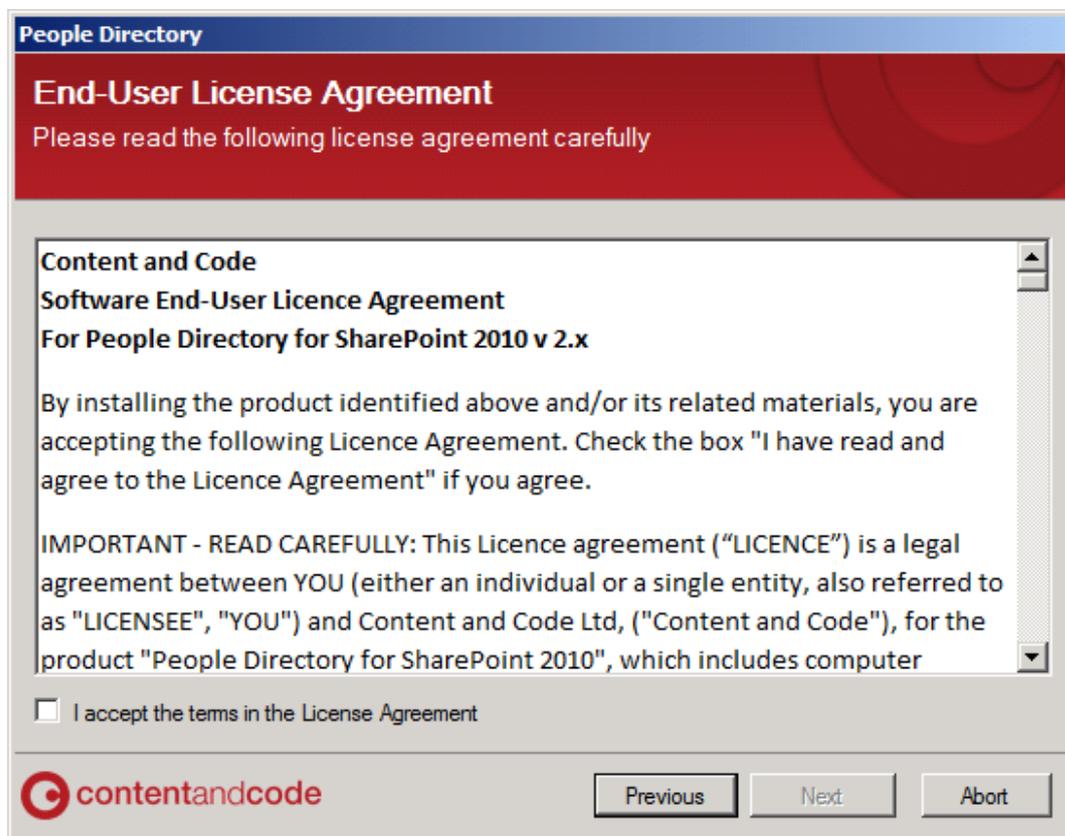
2. Click on **CcPeopleDirectoryLanguagePackInstaller.exe**



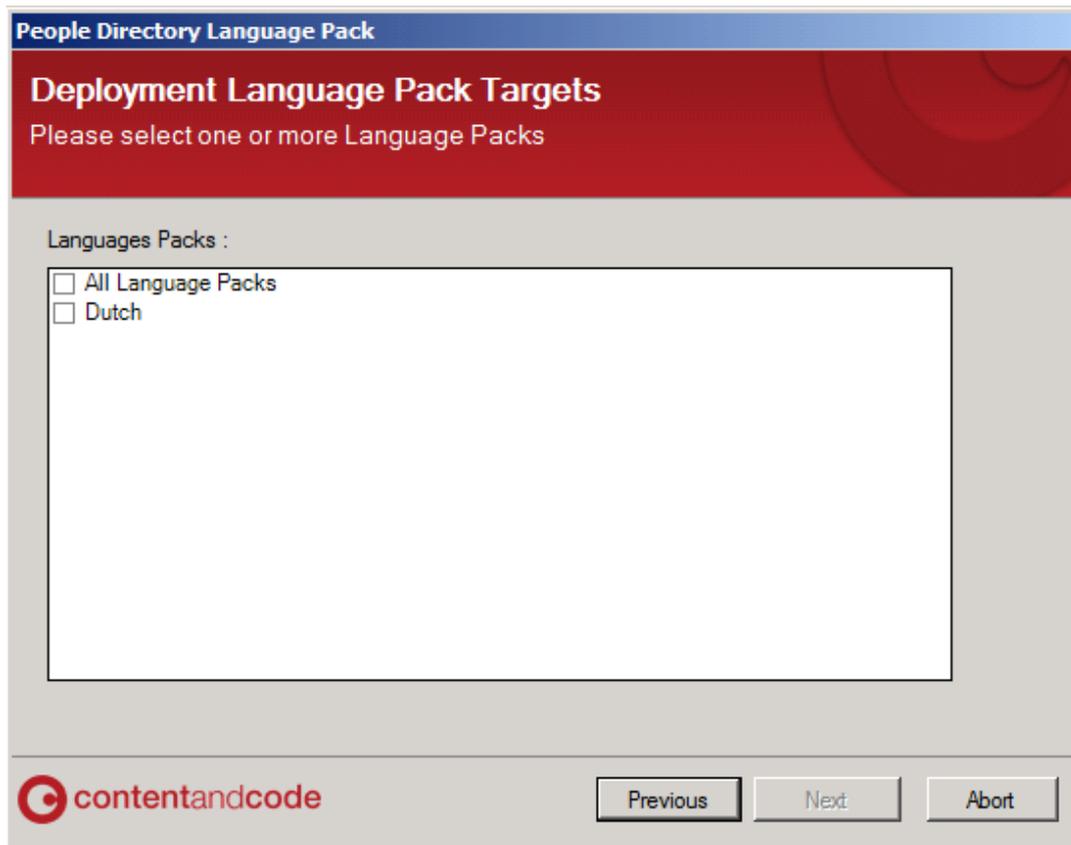
3. Click on Next



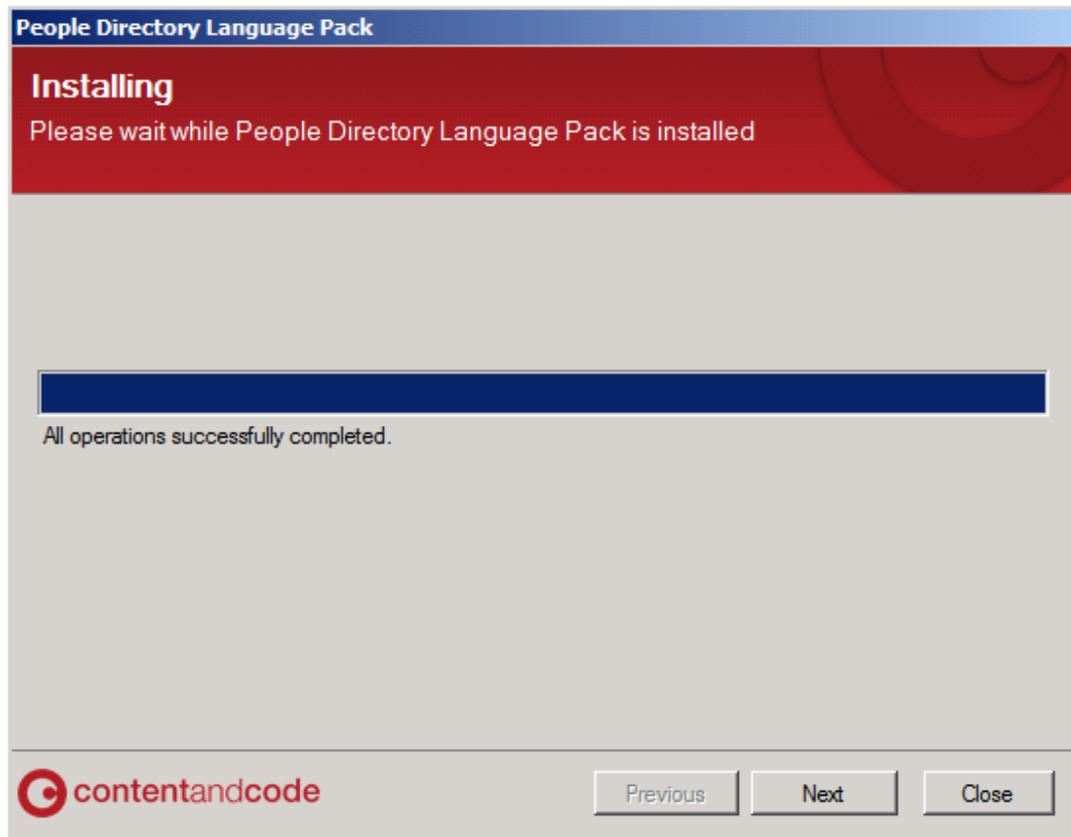
4. Click on Next



5. Read and then agree to the terms of the licensing agreement by selecting **I accept the terms in the License Agreement.**



6. Select the languages required and click on Next

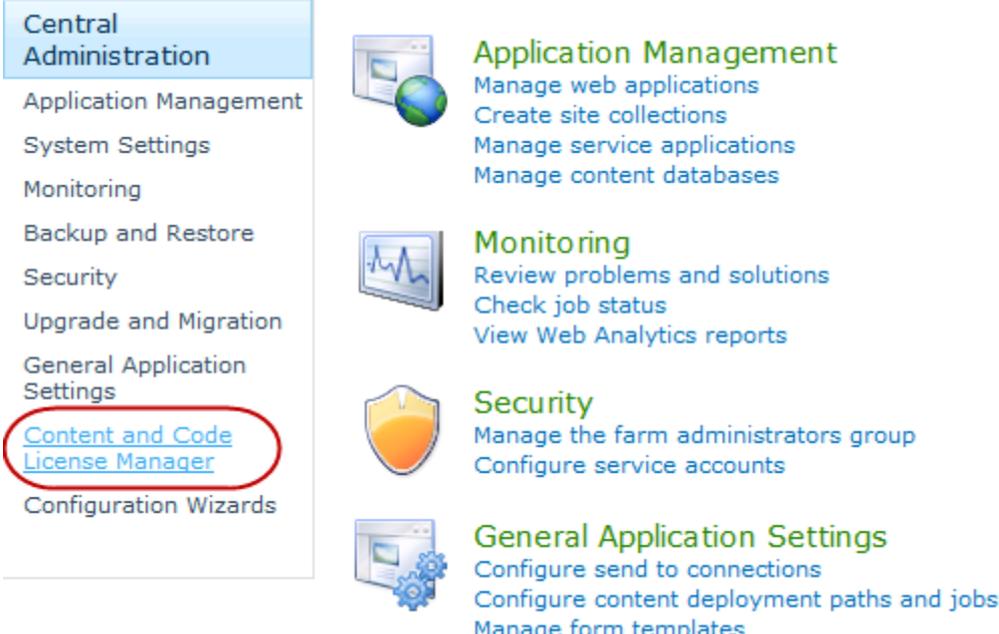


7. Click on Close

8 License Manager

To activate your product, please follow these steps.

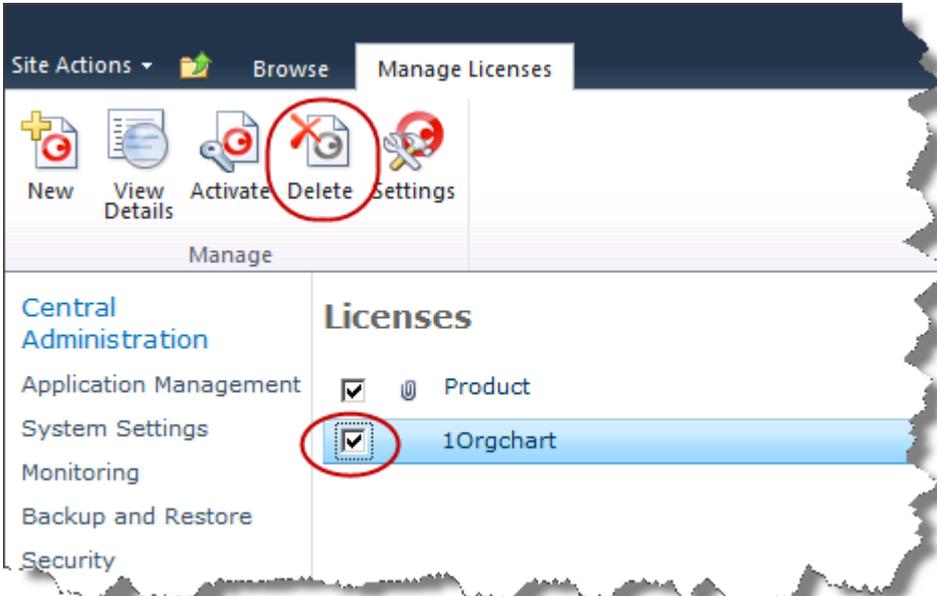
1. In **Central Administration**, click on **Content and Code License Manager**



The screenshot shows the 'Central Administration' menu on the left. The 'Content and Code License Manager' option is circled in red. To the right, there are four main categories with their respective icons and sub-items:

- Application Management** (Icon: Computer and globe)
 - Manage web applications
 - Create site collections
 - Manage service applications
 - Manage content databases
- Monitoring** (Icon: Line graph)
 - Review problems and solutions
 - Check job status
 - View Web Analytics reports
- Security** (Icon: Shield)
 - Manage the farm administrators group
 - Configure service accounts
- General Application Settings** (Icon: Computer and gears)
 - Configure send to connections
 - Configure content deployment paths and jobs
 - Manage form templates

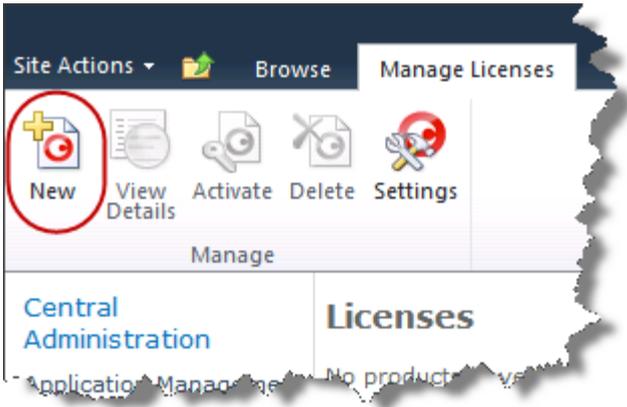
2. Delete the current trial key of your product (Ensure that the selected license key is a Trial Key)



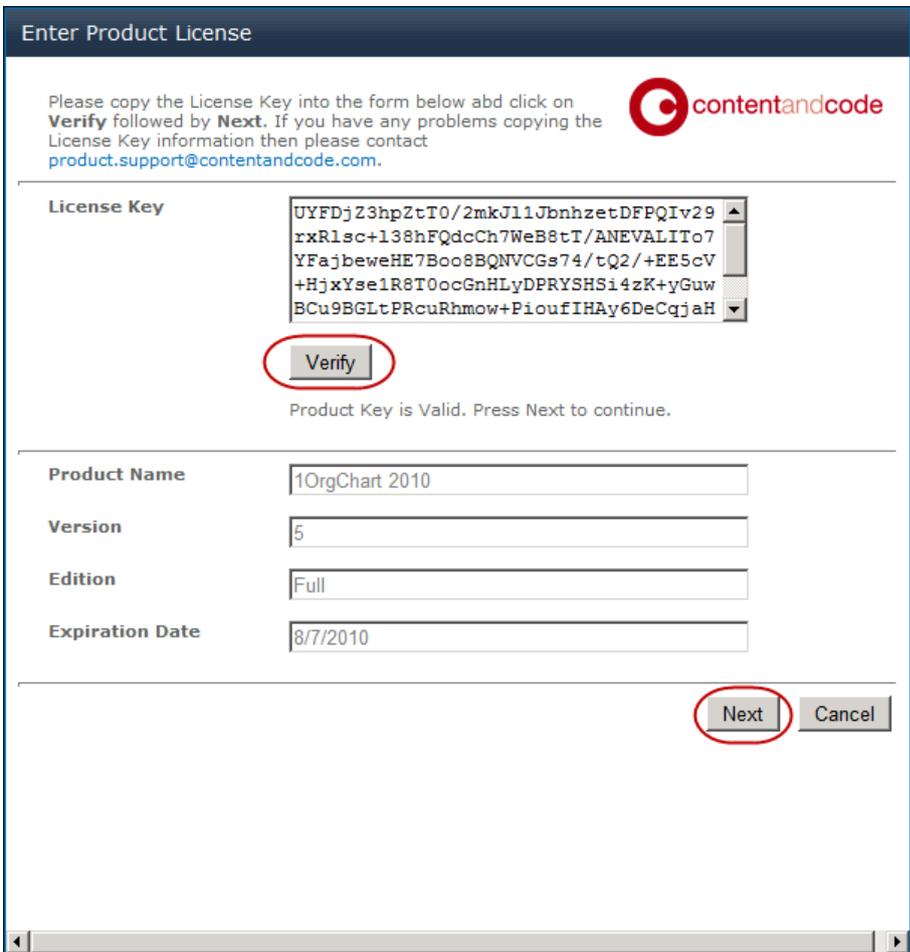
The screenshot shows the 'Manage Licenses' interface. At the top, there is a 'Manage' ribbon with buttons for 'New', 'View Details', 'Activate', 'Delete', and 'Settings'. The 'Delete' button is circled in red. Below the ribbon, there is a 'Licenses' table with a 'Central Administration' sidebar on the left. The 'Delete' checkbox in the table is also circled in red.

Central Administration	Licenses
Application Management	<input checked="" type="checkbox"/> @ Product
System Settings	<input checked="" type="checkbox"/> 1Orgchart
Monitoring	
Backup and Restore	
Security	

3. Once deleted, click **New** in the ribbon



4. Enter the License Key that license key provided within the Licensing email.



Enter Product License

Please copy the License Key into the form below and click on **Verify** followed by **Next**. If you have any problems copying the License Key information then please contact product.support@contentandcode.com.

License Key

```
UYFDjZ3hpZtT0/2mkJl1JbnhzetDFPQIv29  
rxRlsc+138hFQdcCh7WeB8tT/ANEVALITo7  
YFajbeweHE7Boo8BQNVCGs74/tQ2/+EE5cV  
+HjxYse1R8T0ocGnHLyDPRYSHSi4zK+yGuw  
BCu9BGLtPRcuRhmow+PioufIHAY6DeCqjaH
```

Verify

Product Key is Valid. Press Next to continue.

Product Name 1OrgChart 2010

Version 5

Edition Full

Expiration Date 8/7/2010

Next Cancel

5. Click **Verify** and confirm that the details displayed are correct.

6. Click **Next**

7. Click **Activate** to complete

Activate Product License

To activate your license online please verify the details below and click Activate.



Product Name	<input type="text" value="1OrgChart 2010"/>
Version	<input type="text" value="5"/>
Edition	<input type="text" value="Full"/>
Expiration Date	<input type="text" value="8/13/2010 10:23:45 AM"/>
License Key	<input type="text" value="UYFDjZ3hpZtT0/2mkJ11JbnhzetDFPQIv29
rxRlsc+138hFQdcCh7WeB8tI/ANEVALITo7
YFajbeweHE7Boo8BQNVCGs74/tQ2/+EE5cV
+HjxYse1R8T0ocGnHLyDPRYSHSi4zK+yGuw
BCu9BGLtPRcuRhmow+PioufIHAY6DeCaMKB"/>

[Activate the product manually](#)

8.1 Activate the product manually

Once you have verified your license key, you can activate the product manually or online.

To activate the product manually, follow these steps:

1. Click **Activate the product manually**

Activate Product License

To activate your license online please verify the details below and click Activate.



Product Name	<input type="text" value="1OrgChart 2010"/>
Version	<input type="text" value="5"/>
Edition	<input type="text" value="Full"/>
Expiration Date	<input type="text" value="8/7/2010 5:17:15 PM"/>
License Key	<input type="text" value="UYFDjZ3hpZtT0/2mkJl1JbnhzetDFPQIv29
rxRlsc+138hFQdcCh7WeB8tT/ANEVALITo7
YFajbeweHE7Boo8BQNVCGs74/tQ2/+EE5cV
+HjxYse1R8T0ocGnHLyDPYSHS14zK+yGuw
BCu9BGLtPRcuRhmow+PioufIHAY6DeCqjaH"/>

[Activate the product manually](#)

2. Copy the Unique Activation Number (UAN) provided

Activate Product Manually

To activate your product, please follow the steps below. 

Step 1: Generate UAN

Generate a Unique Activation Number and copy it to your clipboard.

UAN

Step 2: Retrieve your new Offline License Key

Visit the [Content and Code Licensing Site](#) and use the Unique Activation Number to retrieve your new product license key.

<https://licensing.contentandcode.com/CcActivationWebService/LicenseActivationForm.aspx>

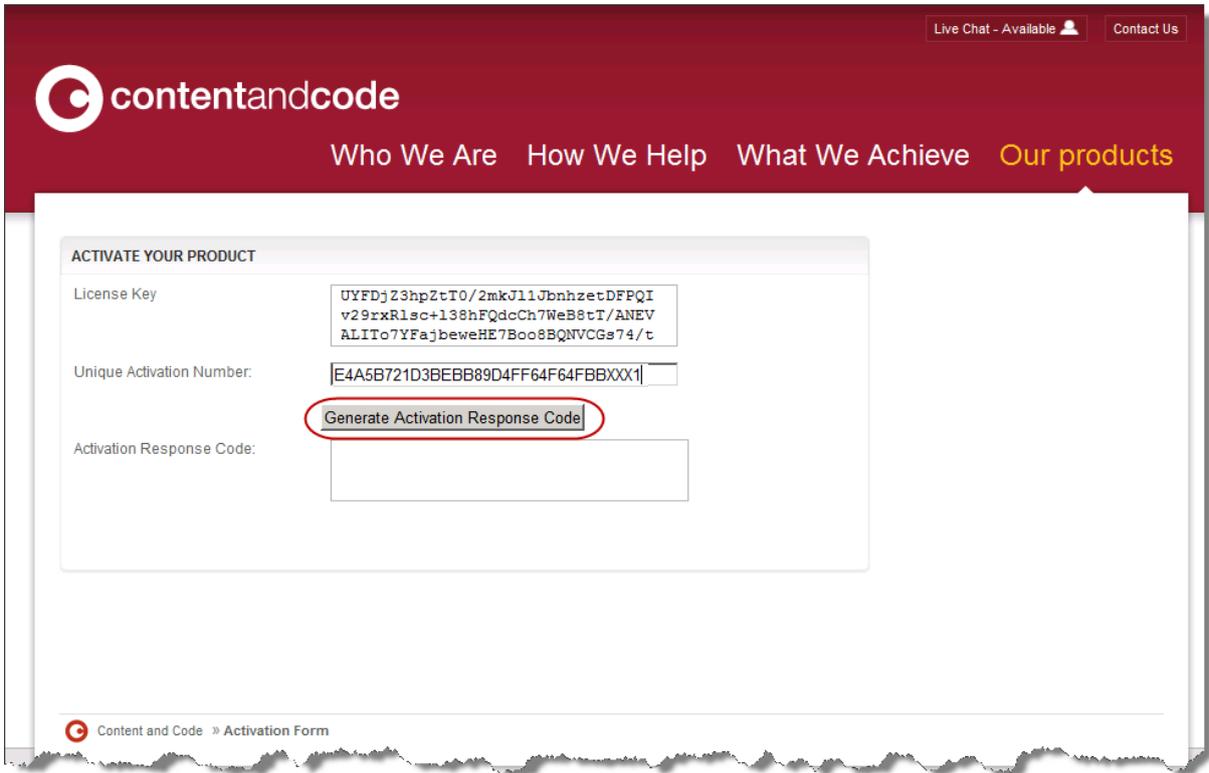
Step 3: Activate the product offline

Paste the Activation Response Code into the following text box and click "Activate".

ARC

3. Click on the link provided within **Step 2: Retrieve your new Offline License Key**

4. Within the online form, enter your **License Key** followed by your **UAN**



The screenshot shows the 'ACTIVATE YOUR PRODUCT' form on the contentandcode website. The form is titled 'ACTIVATE YOUR PRODUCT' and contains the following fields and elements:

- License Key:** A text box containing the alphanumeric string: UYFDjZ3hpZtT0/2mkJ11JbnhzeDFPQI v29rxR1ec+138hFQdcCh7WeB8tI/ANEV ALITo7YFajbeweHE7Boo8BQNVCGs74/t
- Unique Activation Number:** A text box containing the alphanumeric string: E4A5B721D3BEBB89D4FF64F64FBBXX1
- Activation Response Code:** An empty text box.
- Generate Activation Response Code:** A button with a red border and a red circle around it, indicating it should be clicked.

At the bottom of the form, there is a breadcrumb trail: Content and Code » Activation Form.

5. Click **Generate Activation Response Code**
6. Once your **ARC** has been generated, copy the generated text into the **ARC** field provided in **Step 3: Activate the product offline**

Activate Product Manually

To activate your product, please follow the steps below.



Step 1: Generate UAN

Generate a Unique Activation Number and copy it to your clipboard.

UAN

Step 2: Retrieve your new Offline License Key

Visit the [Content and Code Licensing Site](#) and use the Unique Activation Number to retrieve your new product license key.

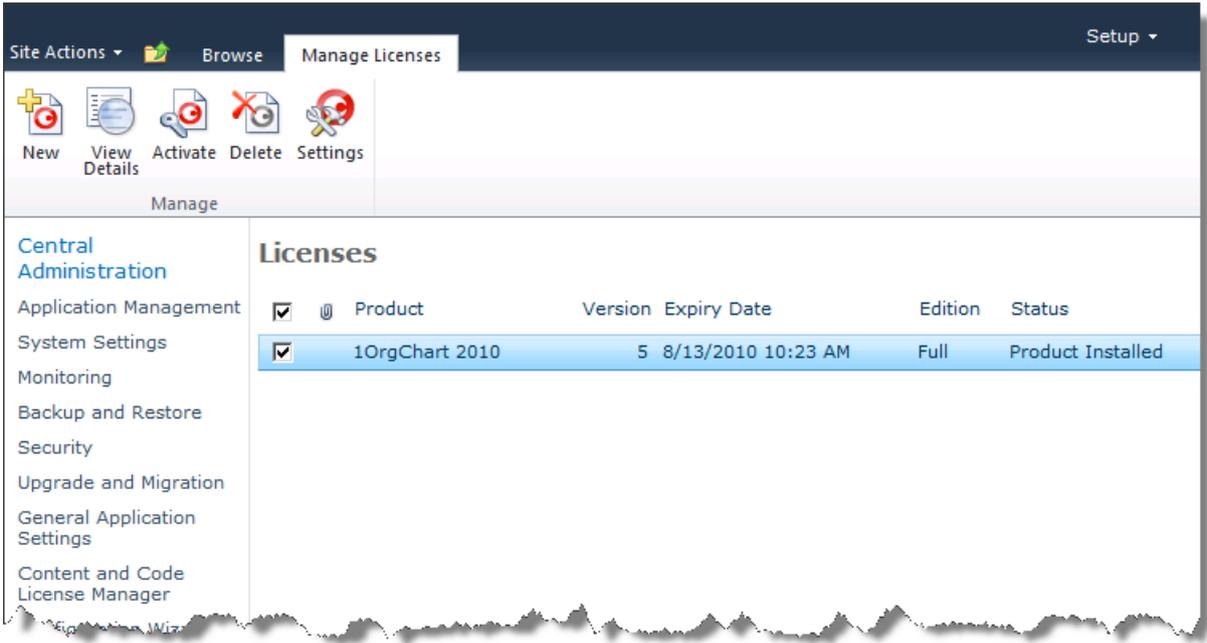
<https://licensing.contentandcode.com/CcActivationWebService/LicenseActivationForm.aspx>

Step 3: Activate the product offline

Paste the Activation Response Code into the following text box and click "Activate".

ARC

7. Click **Activate**



The People Directory license key has now been successfully applied.