contentandcode

People
Directory

User Manual

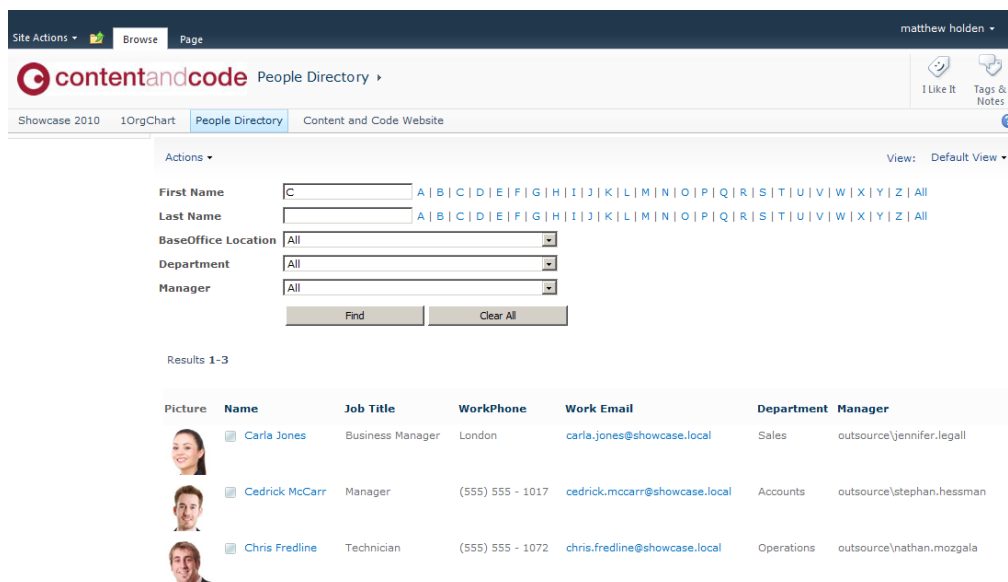Version 2.0.0

Contents

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 user manual is intended for SharePoint users who are configuring and/or using the People Directory web parts and site template within Microsoft SharePoint 2010 or SharePoint Foundations.

Refer to the People Directory Installation Manual for guidance on the steps to install and deploy the People Directory solution.

2 Configuring People Directory

The following instructions will guide you through the steps to create organisation People Directory views using People Directory. Firstly, we will take a look at the elements that make up a People Card.

2.1 Create View

Each People Directory web part can have a number of views which define how the results will be displayed. When you create a People Directory site or add the People Directory web parts to a page a Default View that includes all people in a list view will be created by default.

Follow these steps to create a new view. Please note that you need contribute rights to create views.

1. Click **Create View** from the view drop down menu
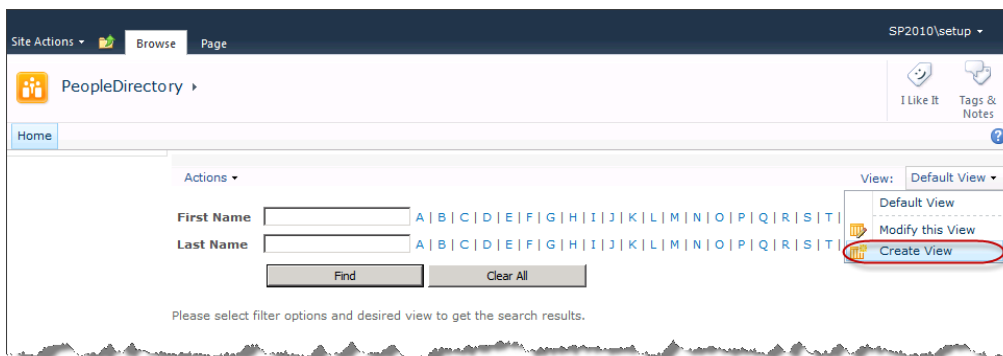
2. Type a name for the view
3. Decide whether the view will be the default view displayed when the page is loaded

4. Select the view style

   a. List View – Displays items in a list

Picture	Name	Job Title	WorkPhone
	☐ Carla Jones	Business Manager	London
	☐ Cedrick McCarr	Manager	(555) 555 - 1017
	☐ Chris Fredline	Technician	(555) 555 - 1072

   b. Card View – Displays items as cards

☐ Orianna Smith
Job Title: Finance Director
Department: Finance

☐ Oswald Ekstrum
Job Title: Developer
Department: Development

☐ Owen Avison
Job Title: Product Manager
Department: Products

5. Select the properties that you would like to display in the view
6. Select the View Style
7. Select the field that you want to sort the results on and the order in which the items are sorted (ascending or descending)
8. Select whether the view displays Profile Pictures or not
9. Enable or disable online presence information
10. Select the Filter fields and the field type of the selected fields (Text box/Drop down list)
11. Specify the number of items displayed on each page
12. Select whether to Use First Name as My Site Link

Use this page to create or modify a view for People Directory

OK   Cancel

Name
Type a name for this view of People Directory. Make the name descriptive, such as "Full Details", so that users will know what to expect when they select this view.

View Name
☐ Make this the default view ②

Style
Choose a style for this view.

View Style
◉ List View ③
○ Card View

Properties
Select the profile properties you want to show or hide in this view.

* Mandatory property.
** Property that cannot be used for sorting.

Available properties:
About Me**
Account Name
BaseOffice Location
Department

Add >
< Remove

Selected properties:
Preferred Name*

Up
Down ④

Manage Custom user profile properties

Sort
Select a column to determine the order in which items in this view are displayed.

Sort by the column:
Preferred Name* ⑤
◉ Show items in ascending order
(A, B, C, or 1, 2, 3)
○ Show items in descending order
(C, B, A, or 3, 2, 1)

Profile Picture
Select whether profile pictures will be displayed in this view.

☑ Display profile pictures in this view.
Picture size
50   pixels (value between 40 and 100) ⑥

Online Presence Information
Select whether online presence information should be enabled for this view.

Note: Microsoft Office 2003 or higher and an Instant Messaging client are required for online presence.

☑ Enable online presence information in this view ⑦

Filter
Select the properties that will be available as filter options for this view.

* Property with a fixed filter type.

Available filters:
Account Name
BaseOffice Location
Department
Hierarchy Url

Add >
< Remove

Selected filters:
FirstName*
LastName*

Up
Down ⑧

Select the preferred filter type:
◉ Drop-down list (for less than 500 items in the dropdowns)
○ Text box (for improved performance)

Item Limit
Use an item limit to limit the amount of data that is returned to users on each page of this view.

Display items in batches of the specified size:
25 ⑨

My Site Link
Select whether My Site link should appear as First Name Link

☑ Use First Name as My Site Link ⑩

OK   Cancel

Figure 2 Create a View Please note that you need contribute rights to create views.

13. Click **Ok**

Your configured view will now appear.
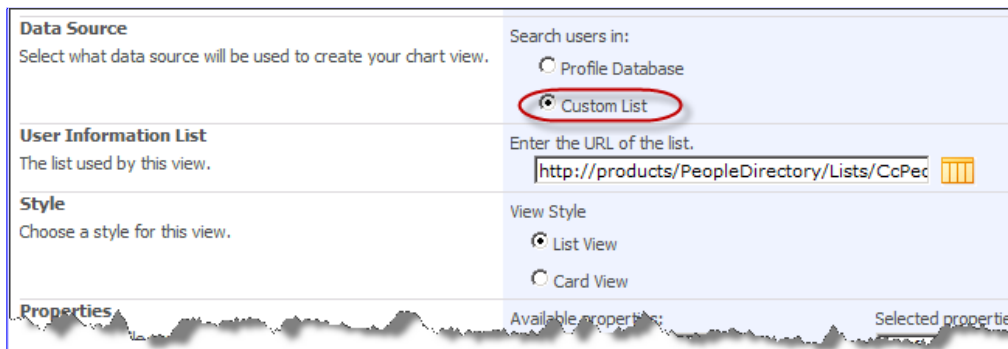
2.2   User Information List

People Directory can be produce profile information using a centralised SharePoint List.

Note:	For servers running Microsoft Foundation only, this option enables you to create views without the need for user profiles and My Sites which are standard features in Microsoft SharePoint 2010.

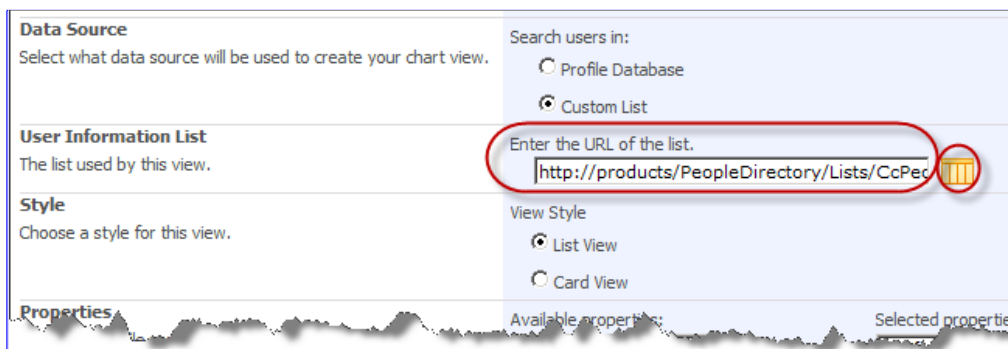1. From the View drop down option, select **Create View**
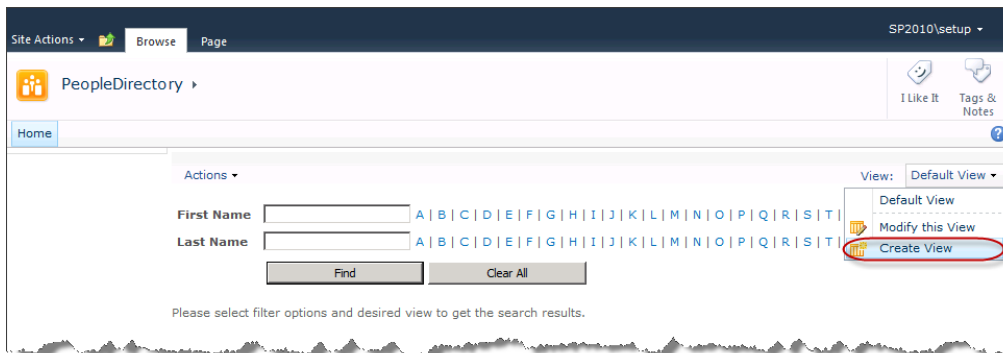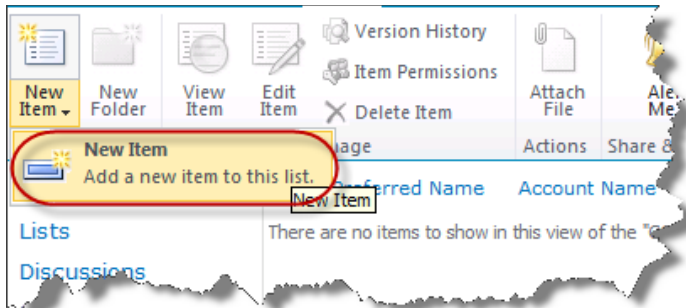

2. In the section **Data Source**, select **Custom List**

3. In the section **User Information List** a default list location will be provided for list entries
4. To select a different list location, select the list icon followed by the desired location

5. Select the default location URL and open within a new tab or window
6. Once the list has been opened, select **New** > **New Item**
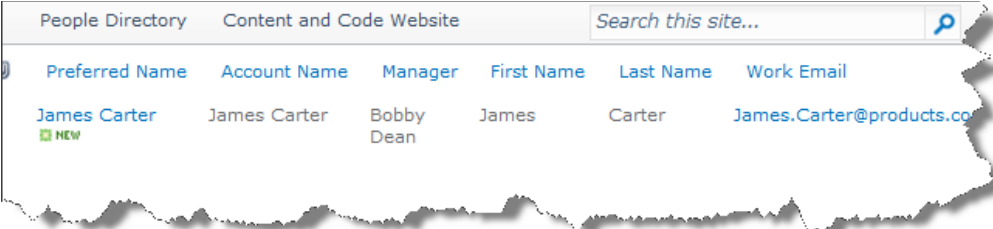
7. Complete the following information about the person

Information field	Required?
Account Name	Yes
Manager	-
First Name	Yes
Last Name	Yes
Work Email	Yes
Office	-
Department	-
Work Phone	-
Cell Phone	-
Fax	-
Picture URL	-
Public URL	-
Preferred Name	Yes
Job Title	-

Account Name *	James Carter
	Enter Account name. Account name should be unique.
Manager	Bobby Dean
	Enter manager account name
First Name	James
	Enter first name
Last Name	Carter
	Enter last name
Work Email *	James.Carter@products.c
	Enter work email
Office	London
	Enter office address
Department	Products
	Enter department
Work Phone	01547 978 465
	Enter work phone number
Cell Phone	087 8423 6587
	Enter cell phone number
Fax	
	Enter fax number
Picture Url	http://portal/products/phot
	Enter the url of profile picture
Public Url	
	Enter profile url
Preferred Name *	James Carter
Job Title	Products Manager

8. Click **Ok**

9. The person will now appear in the SharePoint List

10. Return to the **Create View** page
11. Complete the details for the chart view you wish to create (See section **2.1 Create View**)
12. Click **Ok**
13. People Directory will now return results using information provided within the SharePoint List

2.3 Modify a View

Once additional views are created, a user can modify these views. Please note that you need contribute rights to modify views.

1. From the Product Directory View Settings drop-down, select **Modify This View**
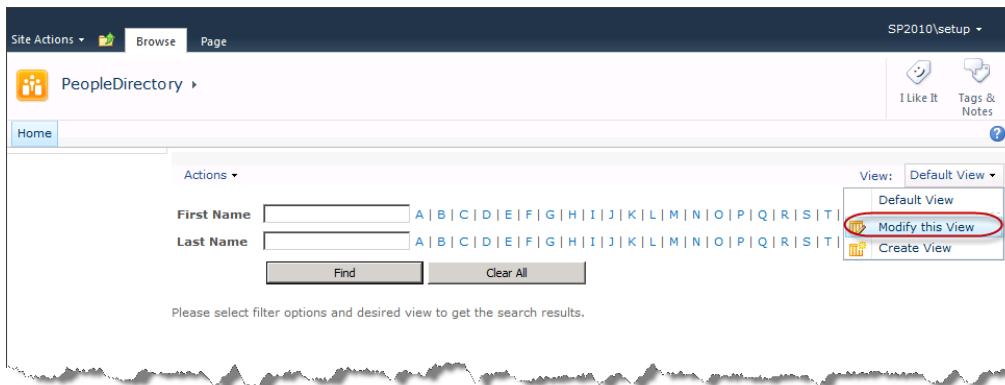
Figure 3 – Modify this view

2. Edit the information you wish changed in the view.
3. Click **OK**

2.4   Delete a View

Follow these steps to delete a view.

1. From the People Directory **View** drop-down, select **Modify This View**

2. Click **Delete**

Note: It is not possible to delete a view which has been selected as the default view.

2.5   Manage People

The Manage People option in People Directory enables you to hide selected people from being displayed in the People Directory results.

2.5.1   Permissions

1. From the People Directory site Select **Edit Page**
2. From the edit menu select **Modify Shared Web Part**
3. Enter the Group which needs permissions to hide People.
4. Click **OK**
5. Click **Exit Edit Mode**
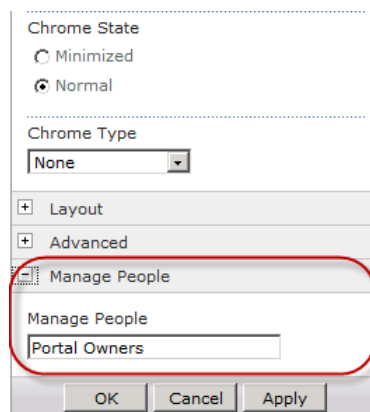
2.5.2 Hiding People

To hide users follow these steps:

1. Select Manage People from the View menu in the People Directory Web Part.

2. Enter users that you want to hide from the People Directory results and click on Add.
3. Once complete

2.5.3 Showing users

When users are hidden that should be shown in the Search results. Tick the box in front of the account and click on **Remove**.

Figure 4 Showing People

2.6   Print all user profiles

Selecting Print all user profiles will display all available profiles before printing. This can be selected without producing any search results.

To print all user profiles, follow these steps:

1.   Click Actions
2.   Print all user profiles
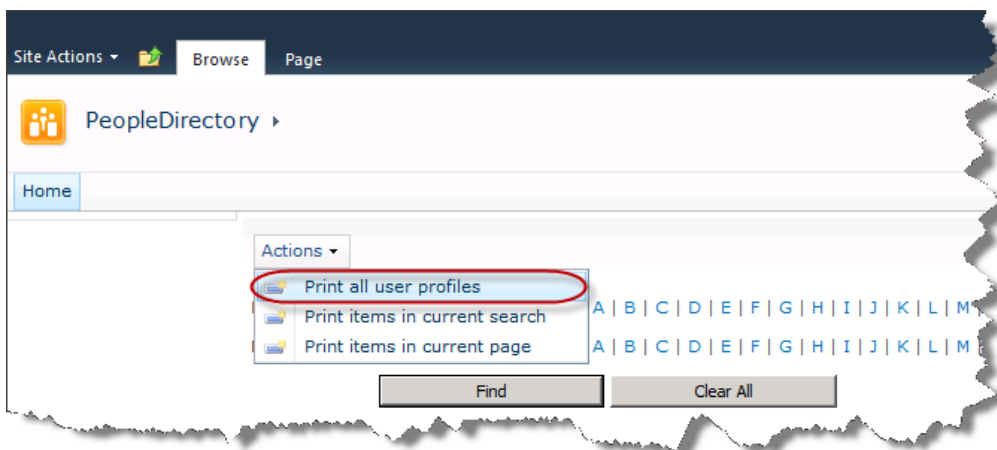
2.7   Print items in current search

Print items in current search will display and print any profiles that are produced in the search results. This will include all profiles on multiple pages within the search criteria.

To select Print Items in current search, follow these steps:

1.   Click **Actions**
2.   Click **Print items in current search**
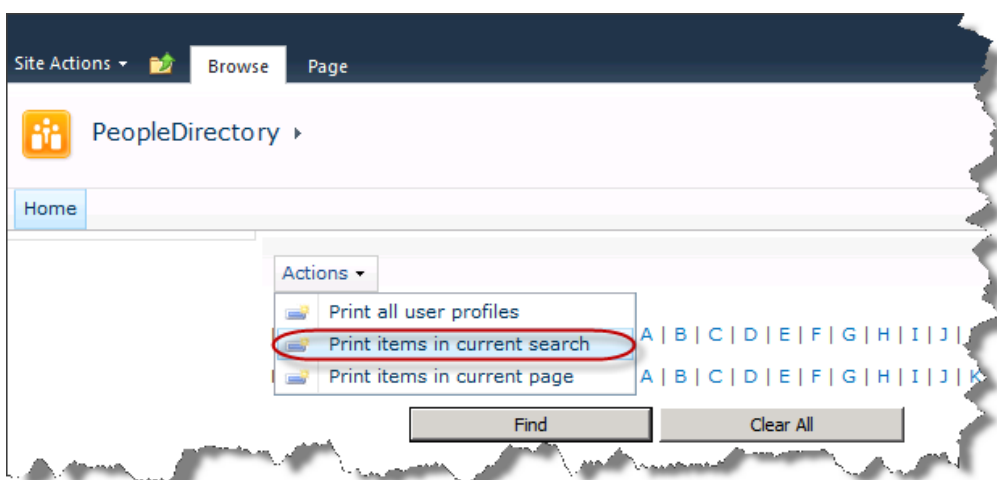
2.8 Print items in current page

Print items in current page will display and print any user profiles visible within the current page.

To select Print items in current page, follow these steps.

1. Select **Actions**
2. Select **Print items in current page**
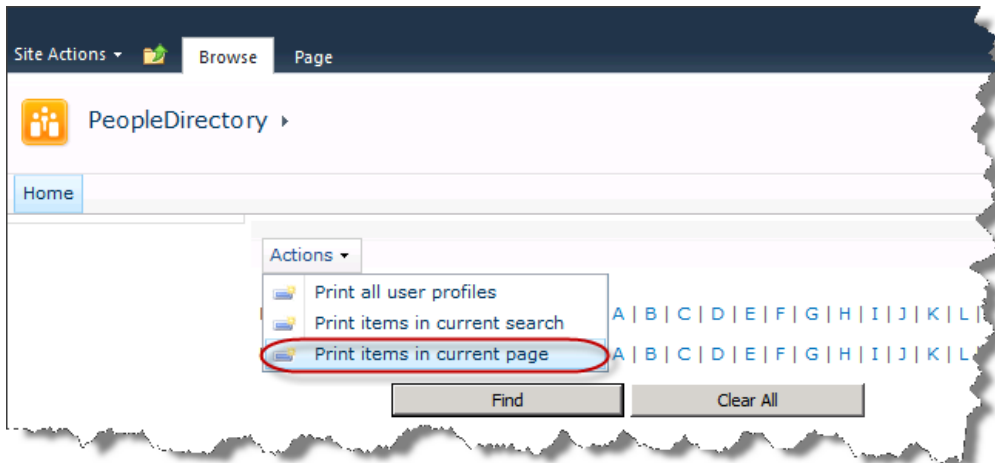
3   Using People Directory

3.1   Change Views

Views can be selected from the View selection drop down menu in the People Directory Web Part.
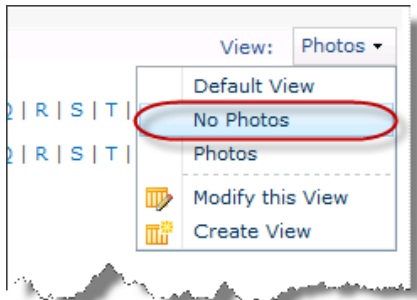
3.2   Locate a Person or People

3.2.1   Filtering by profile property
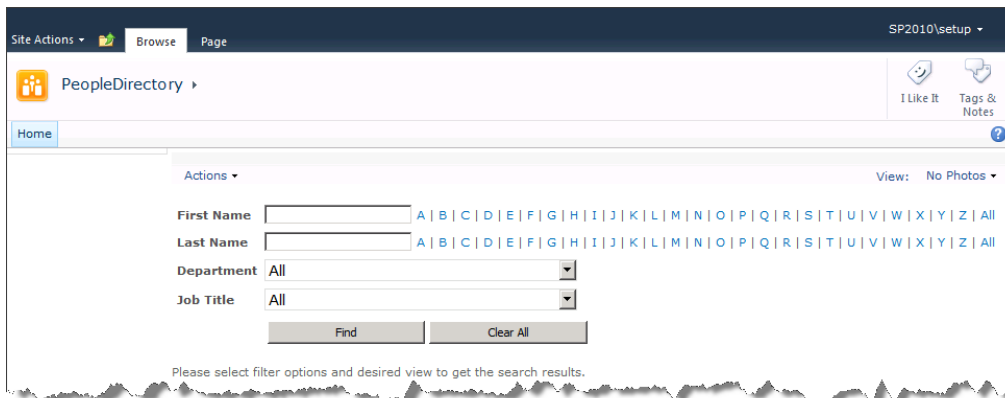
By clicking on the title of a list view column, it's possible to order the results returned by People Directory.

3.2.2   Filter results
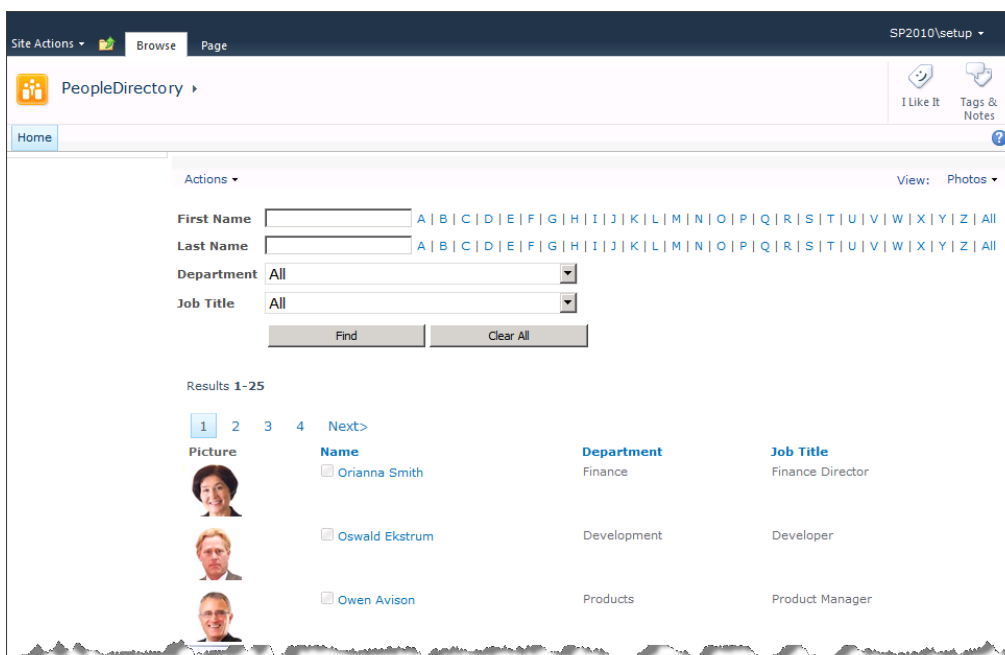
Follow these steps to use the People Directory filters to locate one or more people within your organisation,

1. Click on a letter or **All** of **First Name**, **Last Name**
   - or -
2. Select a Department, Job Title or Office from the available drop downs

3.2.3 Browse results

When the number of results returned exceeds the Item Limit set within the current view, page selection options will appear as shown in
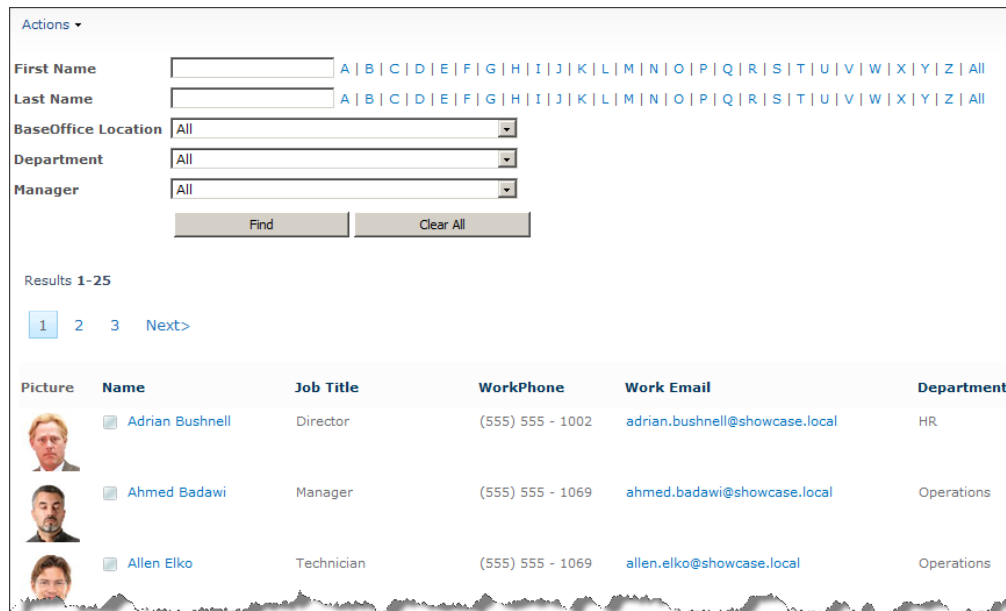
3.3   View User Profile / My Site

People Directory allows you to link directly to a User's My Site to learn more information about them.

1. Click the name of the user
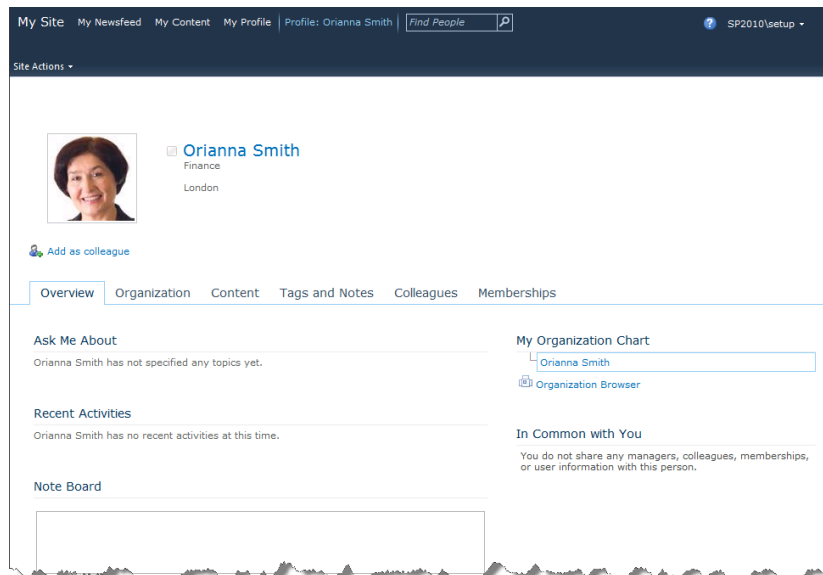
2. The user profile page (i.e. My Site profile) will be displayed.

![contentandcode logo]

3.4   Online Presence

Online Presence is a standard SharePoint feature available in the People Directory results and can be used to perform a number of tasks including checking a person's availability, sending an email and viewing a person's Outlook information. Provided online presence is available in SharePoint, People Directory results can also be configured to include this feature.

If the Online Presence is enabled for the current view, then the Presence icon will be displayed on the left-hand side of the user name (see screen shot below).

Follow these steps to access the only presence option.

1. Click the Online Presence icon
2. Select from the available Online Presence options
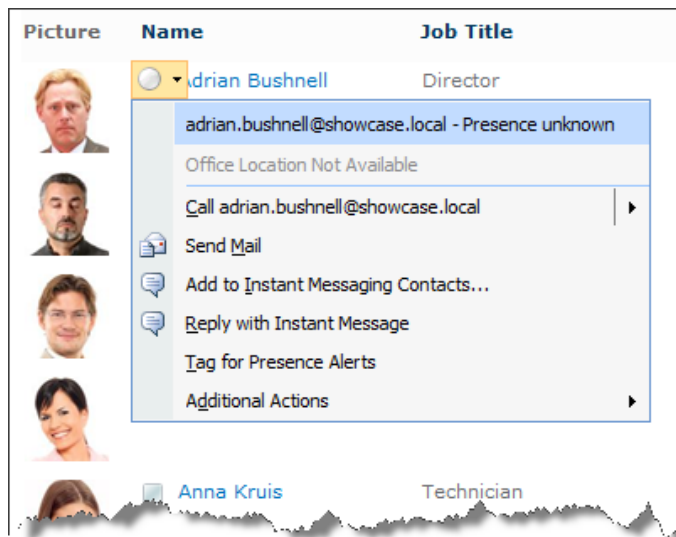
| Important:	The Online Presence options that appear in the dropdown will vary depending on the Microsoft software that is installed on each individual client computer as well as the local Internet Explorer settings on the client computer. Software products that will extend your Online Presence functionality include Microsoft Office Communicator, Windows Messenger, MSN Messenger, Live Messenger and Microsoft Exchange Server. For further information visit the Microsoft website.

4 Create custom profile properties

To create custom profile properties follow the steps outlined in sections 4.1 and 4.2
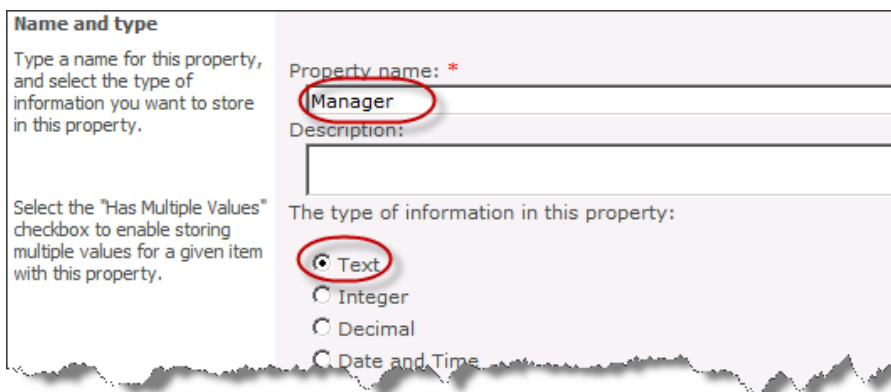
4.1 Create custom metadata property

If you already have custom metadata properties present, progress to **4.2 Add custom property to the Manage Properties List**

To create a custom metadata property, follow these steps:

1. Navigate to **Central Administration** > **Manage Service Applications** > **Search Service** > **Metadata Properties**
2. Click **New Managed Property**
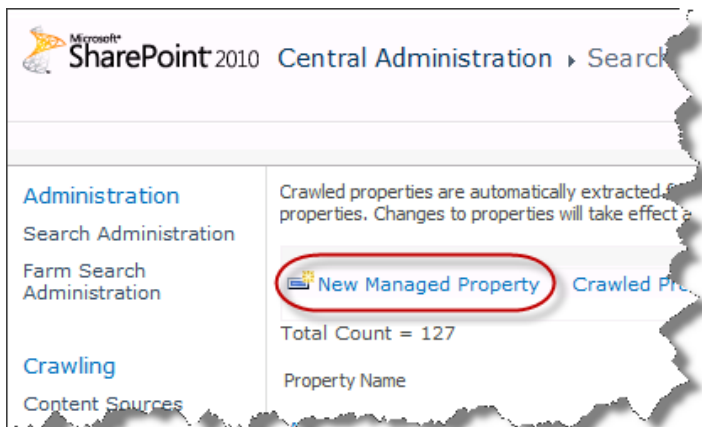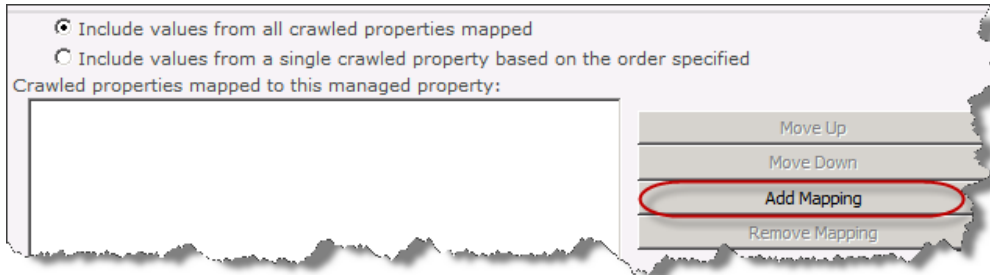
3. Enter the property name (e.g. "manager"- Please ensure that the property created is also present as a user profile property)
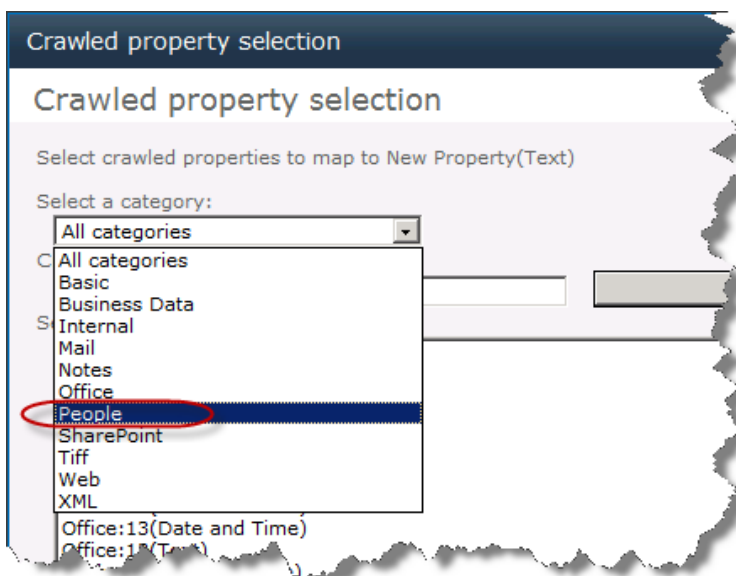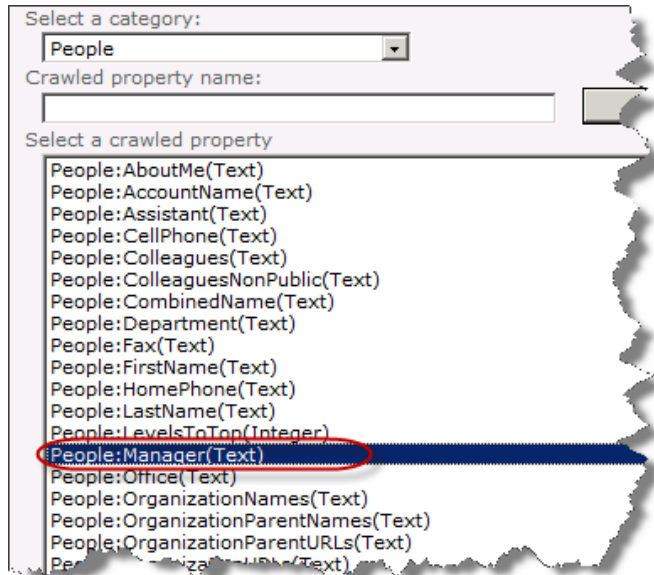
4. In the section **Mappings to crawled properties** click **Add Mapping**
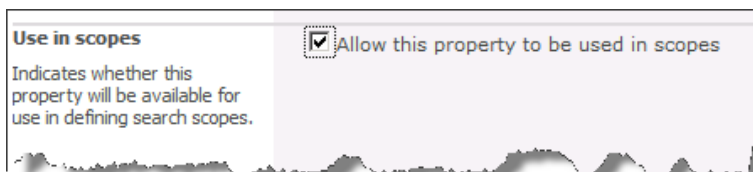

5. From the category drop down, select **People**

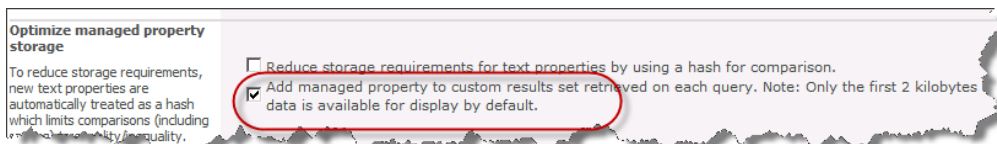6. In the property listing select **People:Manager(text)**

7. Select the option to **Allow this property to be used in scopes**

8. Select **Add managed property to custom results set retrieved on each query. None: Only the first 2 kilobytes data is available for display by default**
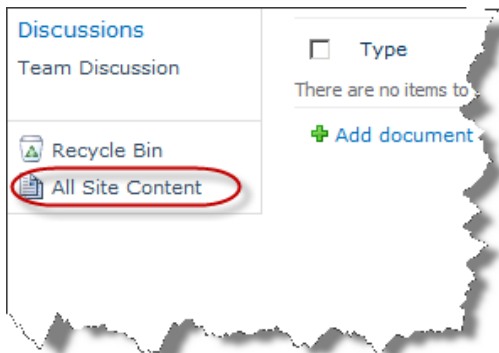
9. Run a full crawl at **Central Administration** > **Manage Service Applications** > **Search Service** > **Content Sources** >
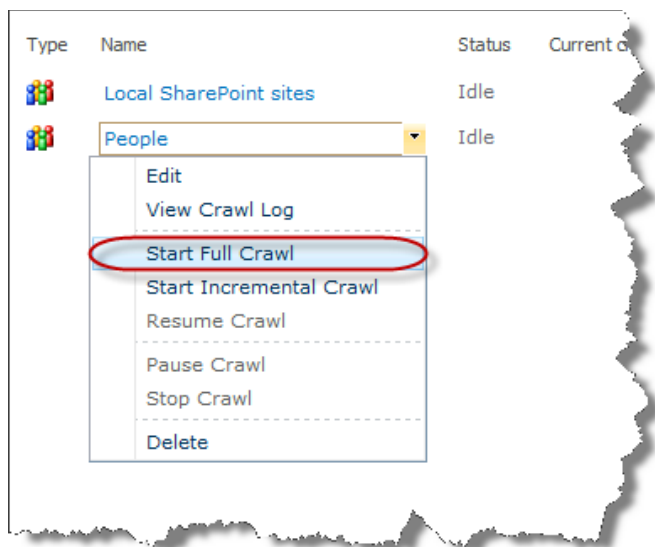
4.2   Add custom property to the Manage Properties List

Once the property is present within the metadata properties section, follow these steps to add the property to the Manage Properties List.
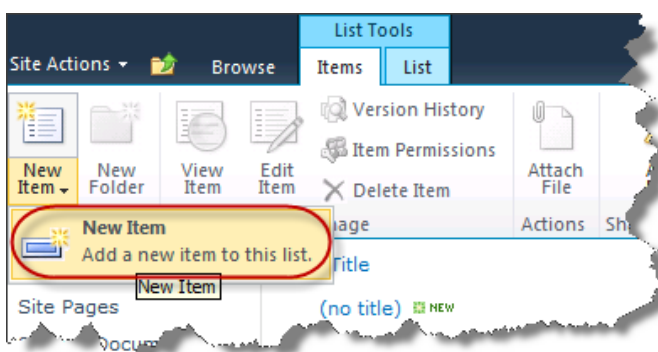
1. On the root of the site collection, click on **All Site Content**

2. Under the heading **Lists**, click on **CC People Directory Manage Properties**
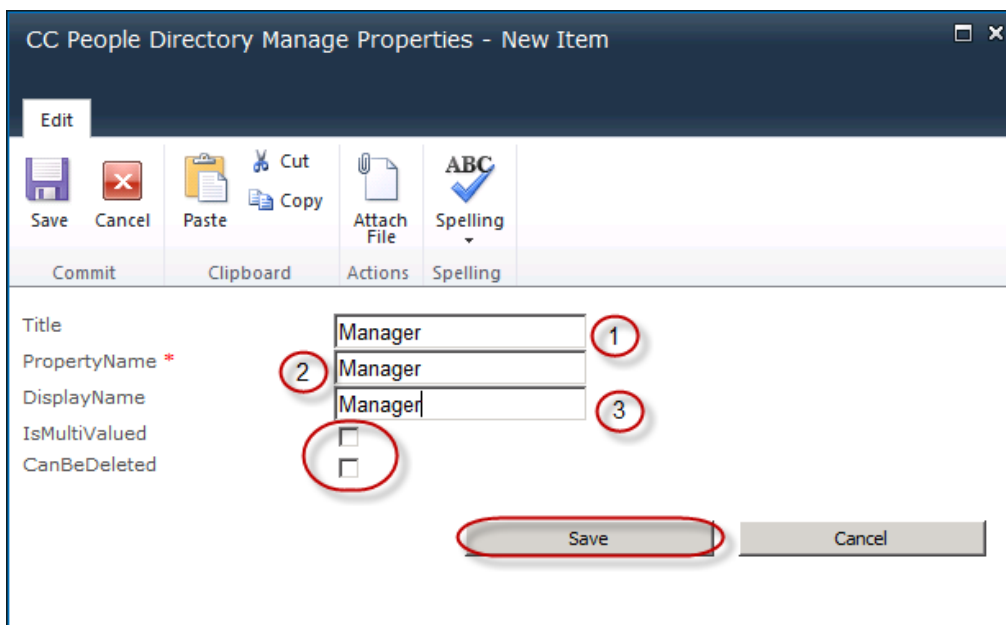

3. Click on **New Item**

![contentandcode logo]
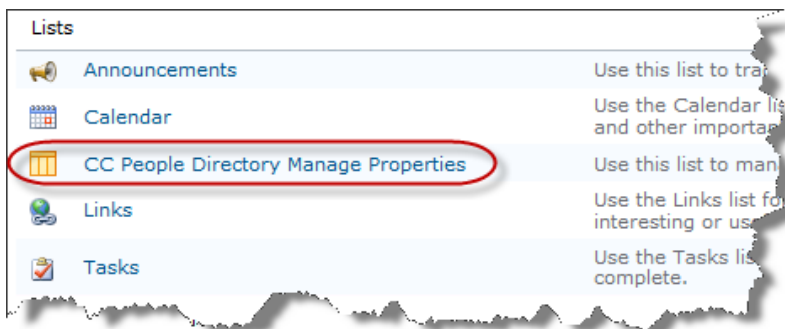
4. Enter the following information

Field	Value
1. **Title**	The title of the property
2. **PropertyName**	The property name as entered within the metadata property (Not the display name)
3. **DisplayName**	How the property will appear within the web part

5. Ensure that both of the selection boxes are unticked.

6. Click **Save**

7. Run a full crawl at **Central Administration** > **Manage Service Applications** > **Search Service** > **Content Sources** >
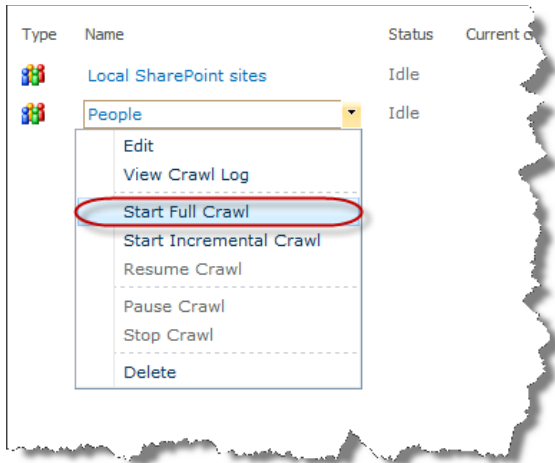
The custom property will a now be available to select within the People Directory web part.