



People Directory

User Manual

Version 2.0.0

Contents

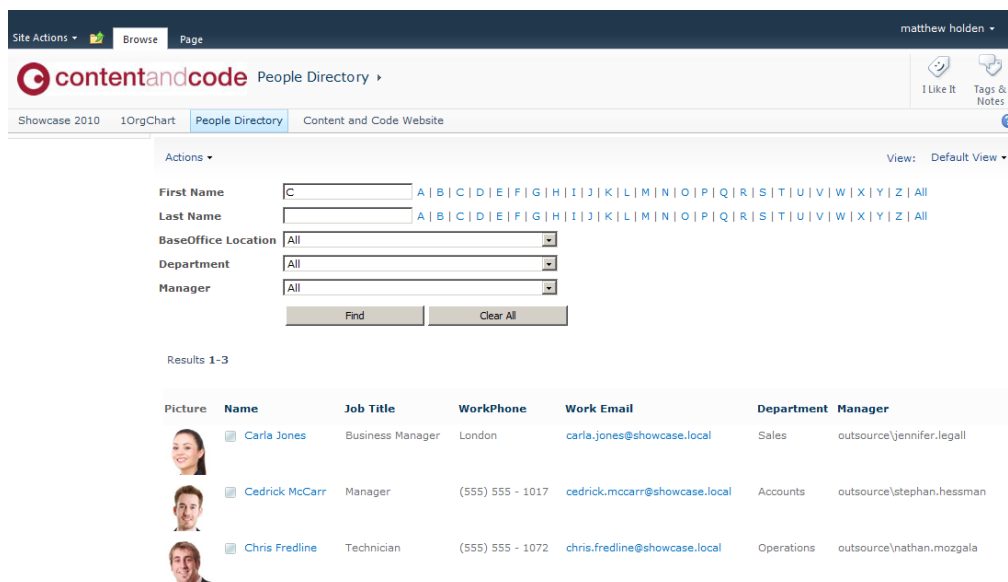
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1 Introduction

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.



Site Actions | Browse | Page | matthew holden

contentandcode People Directory

Showcase 2010 | 1OrgChart | People Directory | Content and Code Website

Actions | View: Default View

First Name: C | 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

Base Office Location: All

Department: All

Manager: All

Find | Clear All

Results 1-3




Picture	Name	Job Title	WorkPhone	Work Email	Department	Manager
	Carla Jones	Business Manager	London	carla.jones@showcase.local	Sales	outsources\jennifer.legall
	Cedrick McCarr	Manager	(555) 555 - 1017	cedrick.mccarr@showcase.local	Accounts	outsources\stephan.hessman
	Chris Fredline	Technician	(555) 555 - 1072	chris.fredline@showcase.local	Operations	outsources\nathan.mozgala

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

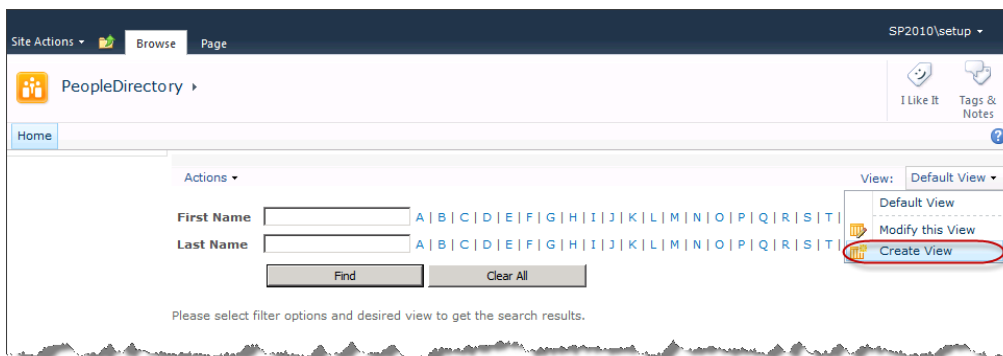
The following instructions will guide you through the steps to create organisation People Directory views using People Directory. Firstly, we will take a look at the elements that make up a People Card.

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
	<input type="checkbox"/> Carla Jones	Business Manager	London
	<input type="checkbox"/> Cedrick McCarr	Manager	(555) 555 - 1017
	<input type="checkbox"/> 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 <input type="text" value=""/> (1) <input type="checkbox"/> Make this the default view (2)
Style Choose a style for this view.	View Style <input checked="" type="radio"/> List View (3) <input type="radio"/> Card View
Properties Select the profile properties you want to show or hide in this view. <small>* Mandatory property.</small> <small>** Property that cannot be used for sorting.</small>	Available properties: About Me** Account Name BaseOffice Location Department Manage Custom user profile properties Add > < Remove Selected properties: Preferred Name* Up Down (4)
Sort Select a column to determine the order in which items in this view are displayed.	Sort by the column: Preferred Name* (5) <input checked="" type="radio"/> Show items in ascending order (A, B, C, or 1, 2, 3) <input type="radio"/> Show items in descending order (C, B, A, or 3, 2, 1)
Profile Picture Select whether profile pictures will be displayed in this view.	<input checked="" type="checkbox"/> 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.	<input checked="" type="checkbox"/> Enable online presence information in this view (7)
Filter Select the properties that will be available as filter options for this view. <small>* Property with a fixed filter type.</small>	Available filters: Account Name BaseOffice Location Department Hierarchy Url Add > < Remove Selected filters: FirstName* LastName* Up Down (8) Select the preferred filter type: <input checked="" type="radio"/> Drop-down list (for less than 500 items in the dropdowns) <input type="radio"/> 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	<input checked="" type="checkbox"/> Use First Name as My Site Link (10)

OK Cancel

Comment [mh1]: Update image – Custom list datasource

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

13. Click **Ok**

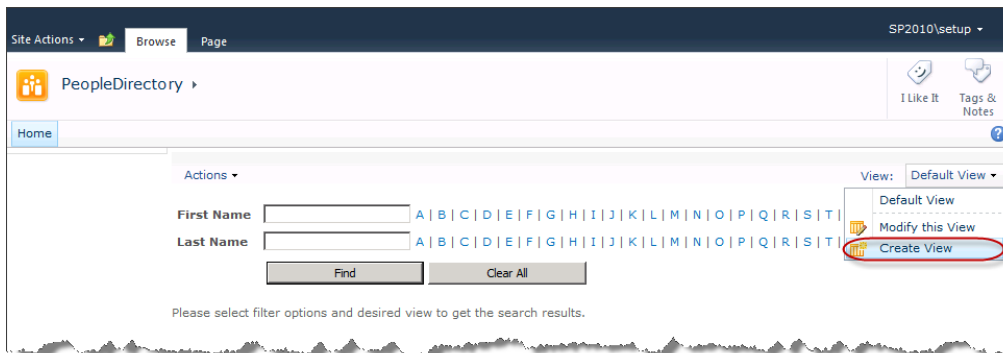
Your configured view will now appear.

2.2 User Information List

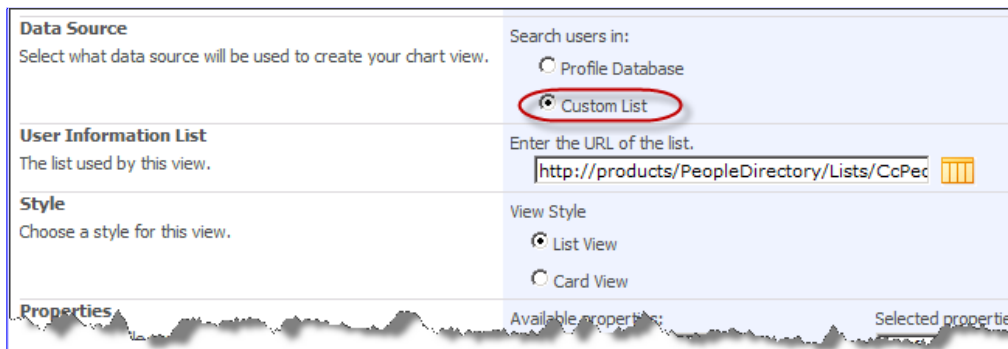
People Directory can produce profile information using a centralised SharePoint List.

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**

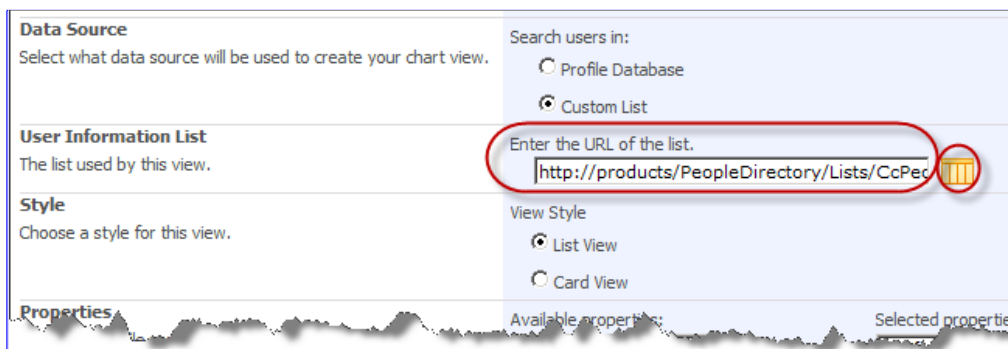


2. In the section **Data Source**, select **Custom List**



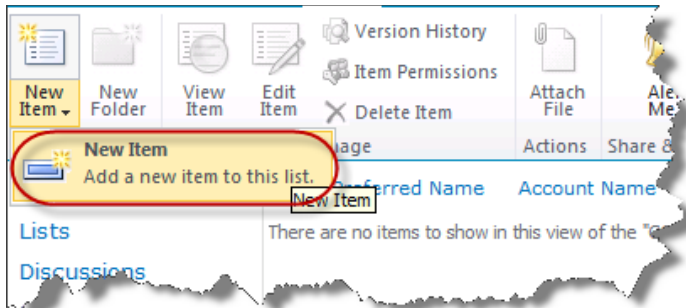
Comment [mh2]: Update image

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



Comment [mh3]: Update Image

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**



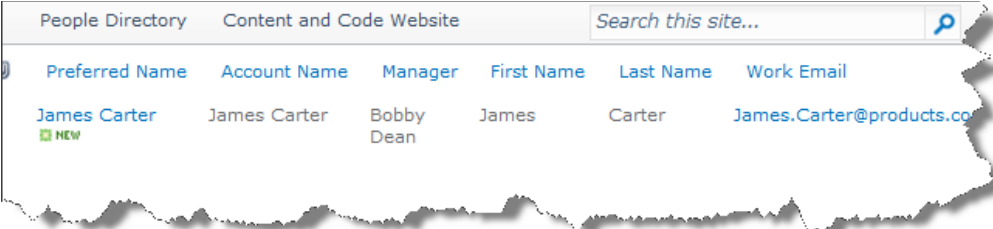
7. Complete the following information about the person

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



People Directory		Content and Code Website		Search this site...	
Preferred Name	Account Name	Manager	First Name	Last Name	Work Email
James Carter <small>NEW</small>	James Carter	Bobby Dean	James	Carter	James.Carter@products.co

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**

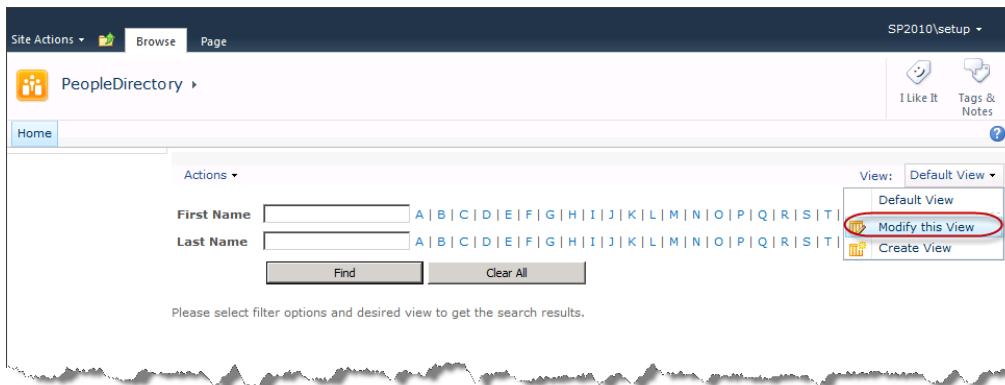


Figure 3 – Modify this view

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**

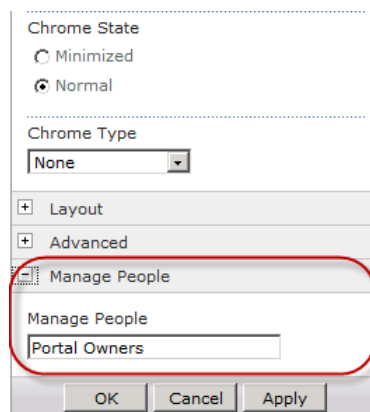
Note: It is not possible to delete a view which has been selected as the default view.

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

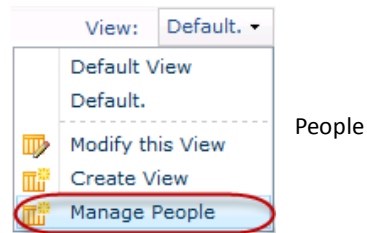
1. From the People Directory site Select **Edit Page**
2. From the edit menu select **Modify Shared Web Part**
3. Enter the Group which needs permissions to hide People.
4. Click **OK**
5. Click **Exit Edit Mode**



2.5.2 Hiding People

To hide users follow these steps:

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



People Directory Data Source
Select what data source will be used to select the properties

Select the data source

☒ Profile Database
☐ Custom List

Select Users to Hide
Add users to the hidden user list below. You can enter user names, group names or e-mail address. Separate them with semicolons.

Hidden Users List
The following users will be excluded from the people directory results.

Account name	Work e-mail	
<input type="checkbox"/> SP2010\pieter.veenstra	pieter.veenstra@contentandcode.com	<input type="button" value="Remove"/>

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**.

Hidden Users List
The following users will be excluded from the people directory results.

Account name	Work e-mail	
<input checked="" type="checkbox"/> SP2010\pieter.veenstra	pieter.veenstra@contentandcode.com	<input type="button" value="Remove"/>

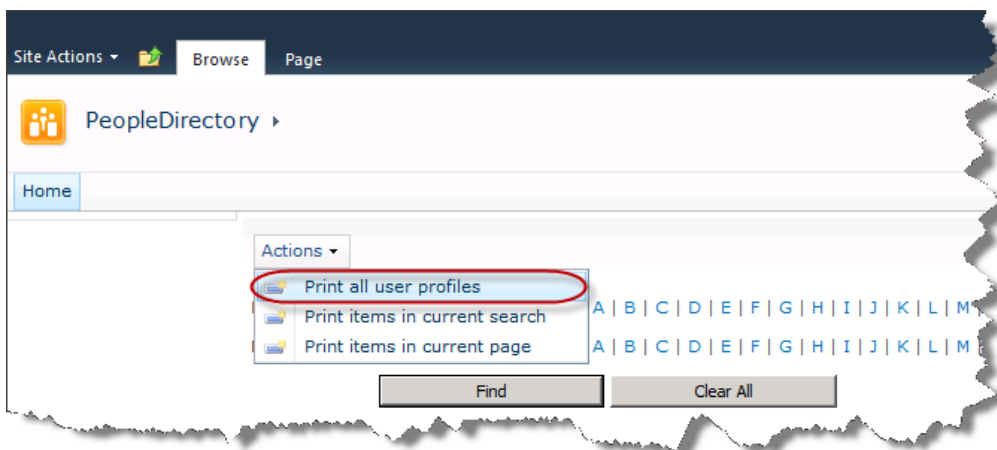
Figure 4 Showing People

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

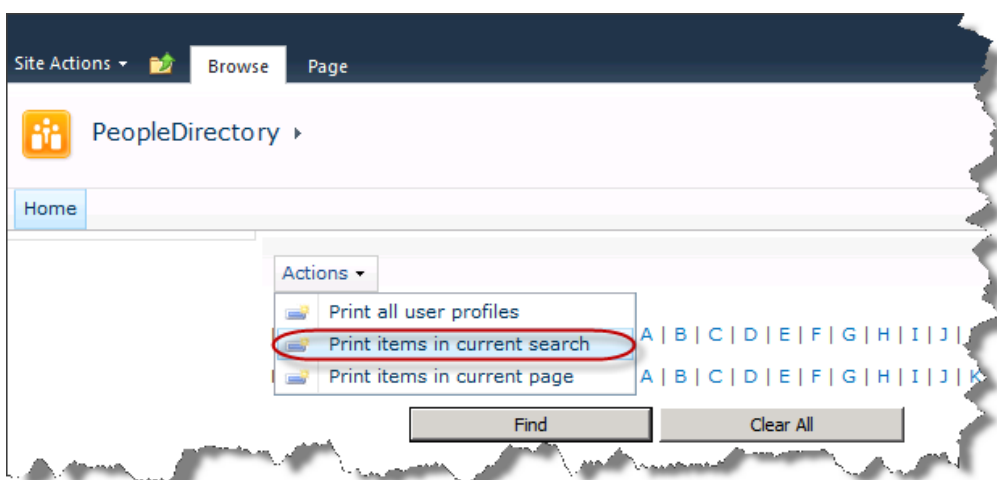


2.7 Print items in current search

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**

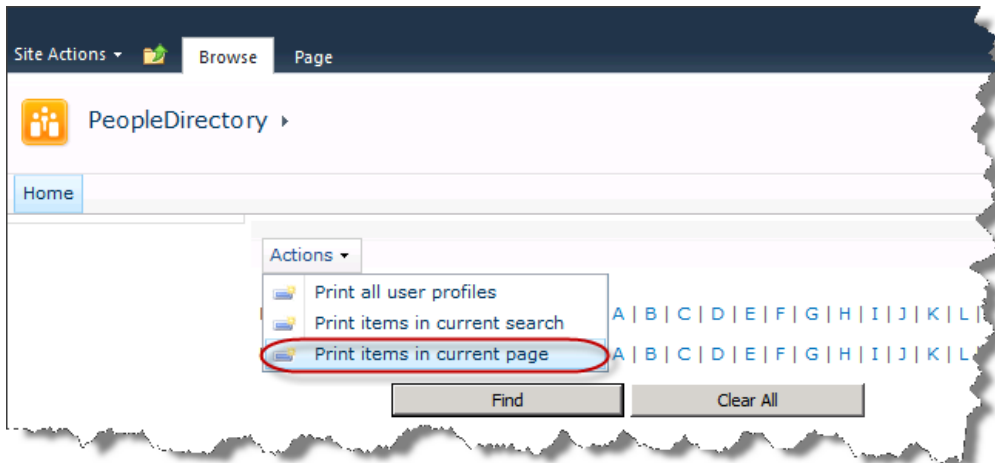


2.8 Print items in current page

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.

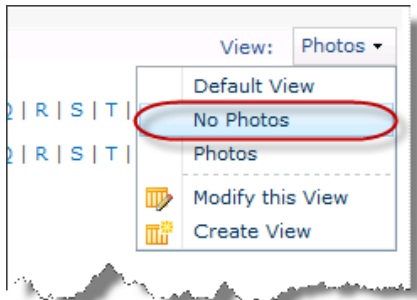
1. Select **Actions**
2. Select **Print items in current page**



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

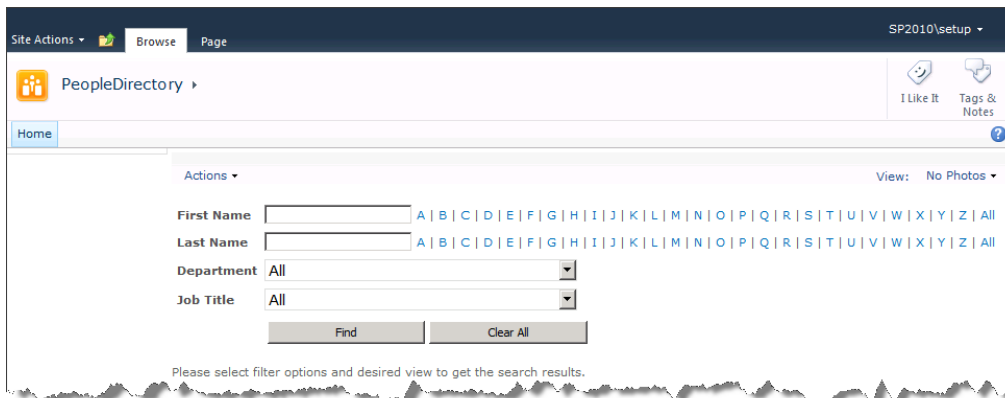
By clicking on the title of a list view column, it's possible to order the results returned by People Directory.

Name	Department	Job Title	First Name↑	Last Name
<input type="checkbox"/> Orianna Smith	Finance	Finance Director	Orianna	Smith
<input type="checkbox"/> Oswald Ekstrum	Development	Developer	Oswald	Ekstrum
<input type="checkbox"/> Owen Avison	Products	Product Manager	Owen	Avison

3.2.2 Filter results

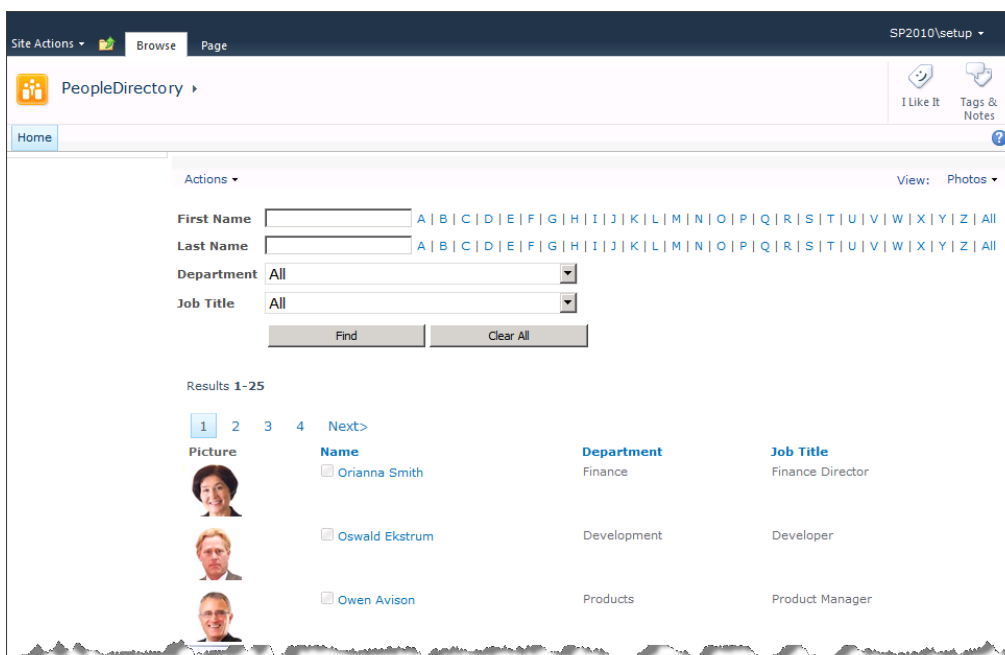
Follow these steps to use the People Directory filters to locate one or more people within your organisation,




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

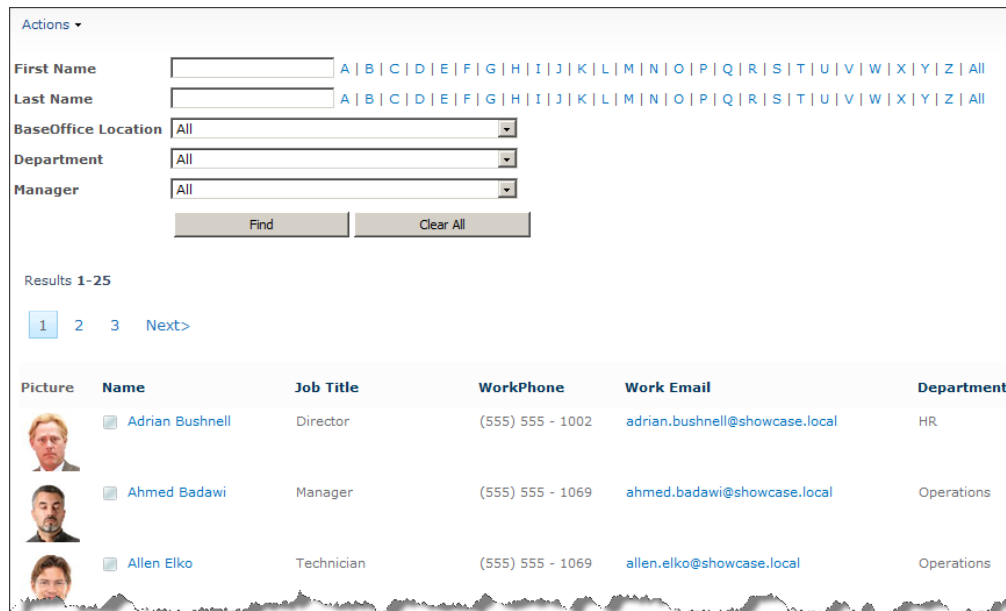


Picture	Name	Department	Job Title
	Orianna Smith	Finance	Finance Director
	Oswald Ekstrum	Development	Developer
	Owen Avison	Products	Product Manager

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



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

BaseOffice Location All

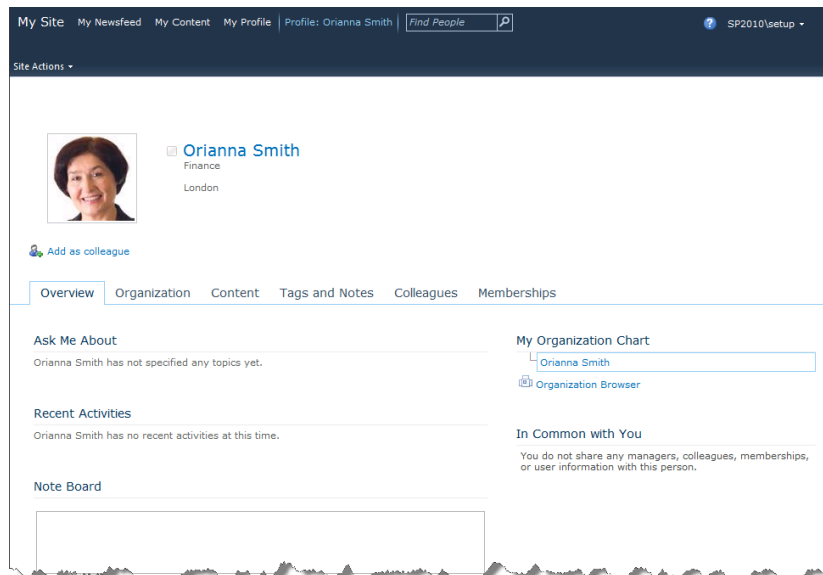
Department All

Manager All

Results 1-25


Picture	Name	Job Title	WorkPhone	Work Email	Department
	Adrian Bushnell	Director	(555) 555 - 1002	adrian.bushnell@showcase.local	HR
	Ahmed Badawi	Manager	(555) 555 - 1069	ahmed.badawi@showcase.local	Operations
	Allen Elko	Technician	(555) 555 - 1069	allen.elko@showcase.local	Operations

2. The user profile page (i.e. My Site profile) will be displayed.



My Site My Newsfeed My Content My Profile Profile: Orianna Smith

Site Actions ▾

 **Orianna Smith**
Finance
London

[Add as colleague](#)


[Overview](#) [Organization](#) [Content](#) [Tags and Notes](#) [Colleagues](#) [Memberships](#)

Ask Me About
Orianna Smith has not specified any topics yet.

Recent Activities
Orianna Smith has no recent activities at this time.

Note Board

My Organization Chart

-  Orianna Smith
- [Organization Browser](#)

In Common with You
You do not share any managers, colleagues, memberships, or user information with this person.

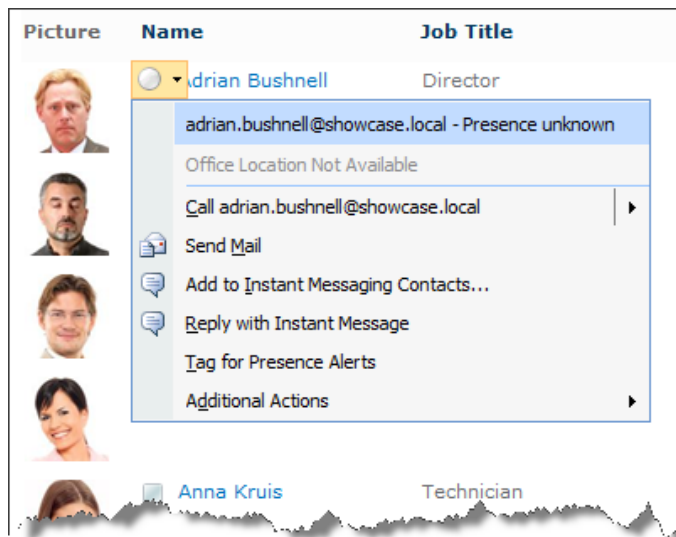
3.4 Online Presence

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

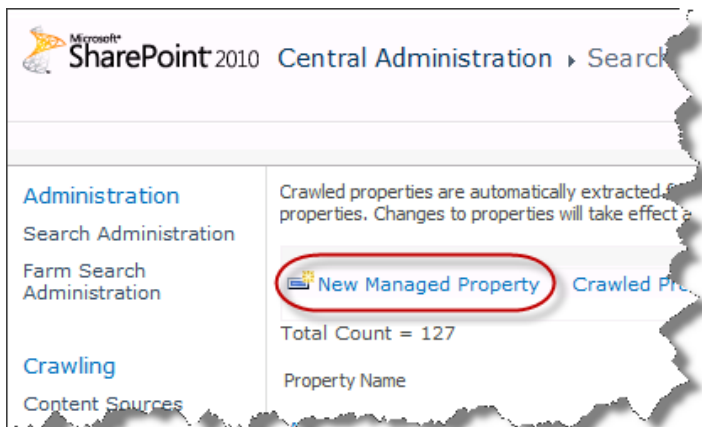
To create custom profile properties follow the steps outlined in sections 4.1 and 4.2

4.1 Create custom metadata property

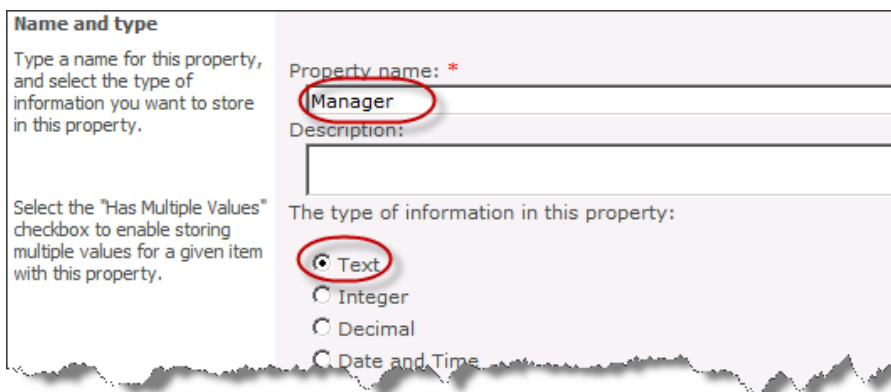
If you already have custom metadata properties present, progress to **4.2 Add custom property to the Manage Properties List**

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**

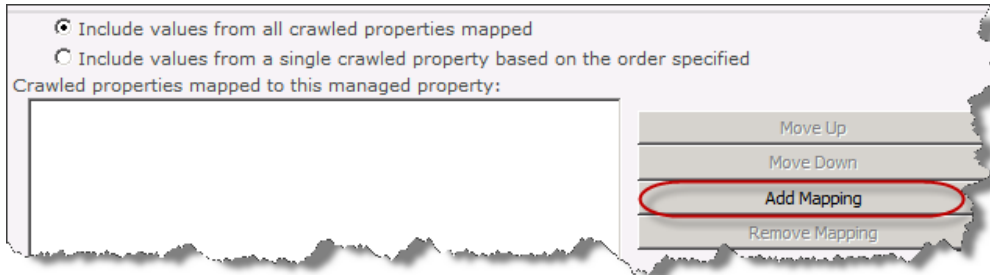


3. Enter the property name (e.g. "manager" - Please ensure that the property created is also present as a user profile property)

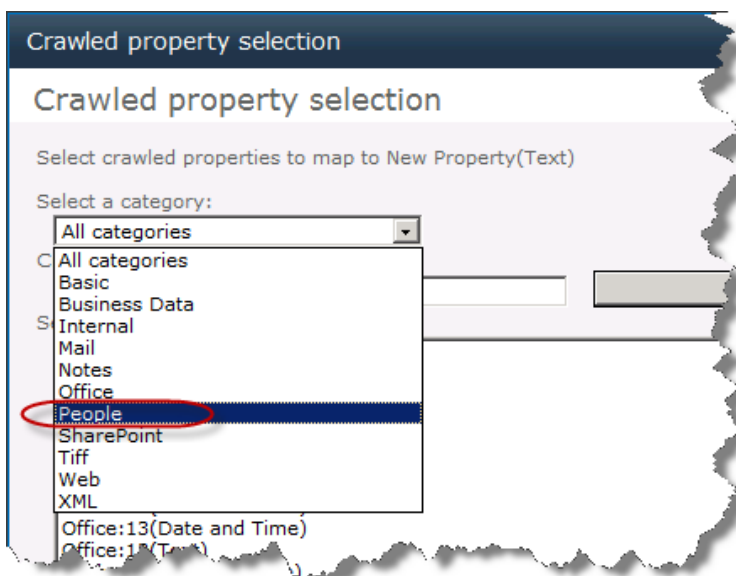


The screenshot shows the 'Name and type' form for creating a new managed property. The form has two main sections. The first section, 'Name and type', contains a 'Property name: *' field with the value 'Manager' (circled in red) and a 'Description:' field. The second section, 'The type of information in this property:', contains a 'Has Multiple Values' checkbox (unchecked) and a group of radio buttons: 'Text' (selected and circled in red), 'Integer', 'Decimal', and 'Date and Time'.

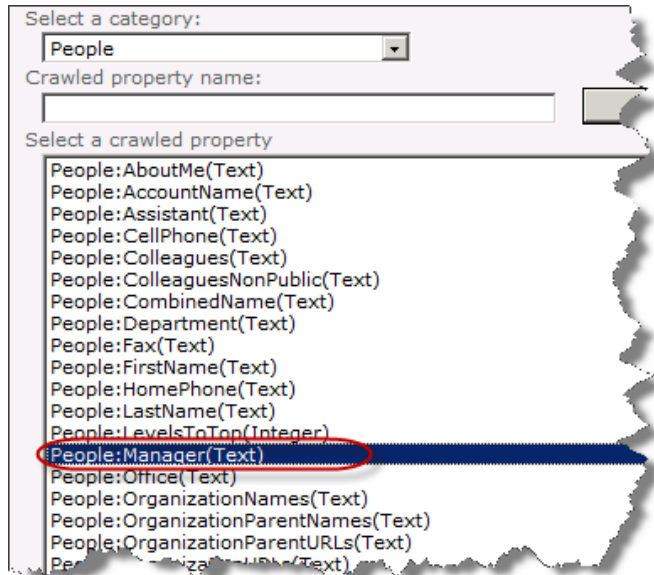
4. In the section **Mappings to crawled properties** click **Add Mapping**



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

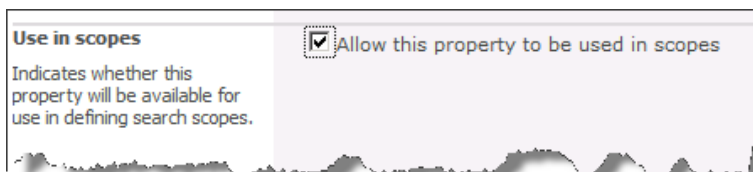


6. In the property listing select **People:Manager(text)**



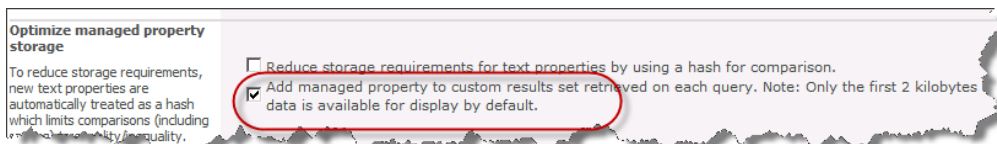
Select a category:
 People
 Crawled property name:
 Select a crawled property
 People:AboutMe(Text)
 People:AccountName(Text)
 People:Assistant(Text)
 People:CellPhone(Text)
 People:Colleagues(Text)
 People:ColleaguesNonPublic(Text)
 People:CombinedName(Text)
 People:Department(Text)
 People:Fax(Text)
 People:FirstName(Text)
 People:HomePhone(Text)
 People:LastName(Text)
 People:LevelsToTop(Integer)
People:Manager(Text)
 People:Office(Text)
 People:OrganizationNames(Text)
 People:OrganizationParentNames(Text)
 People:OrganizationParentURLs(Text)
 People:OrganizationURLs(Text)

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



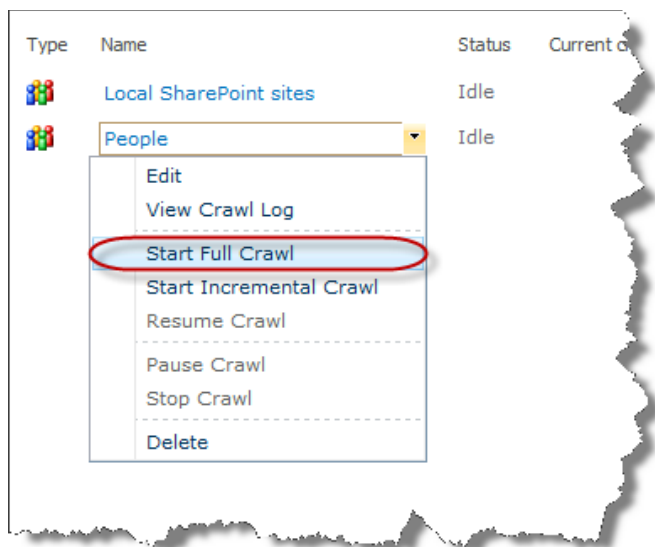
Use in scopes
 Indicates whether this property will be available for use in defining search scopes.
☒ Allow this property to be used in scopes

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**



Optimize managed property storage
 To reduce storage requirements, new text properties are automatically treated as a hash which limits comparisons (including equality/inequality).
☐ Reduce storage requirements for text properties by using a hash for comparison.
☒ Add managed property to custom results set retrieved on each query. Note: Only the first 2 kilobytes data is available for display by default.

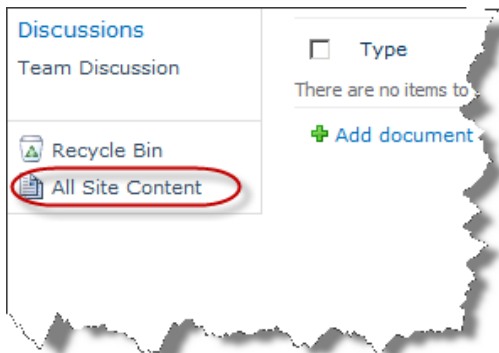
9. Run a full crawl at **Central Administration > Manage Service Applications > Search Service > Content Sources >**



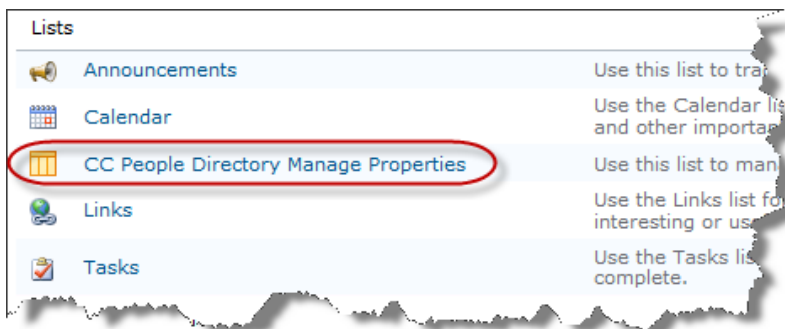
4.2 Add custom property to the Manage Properties List

Once the property is present within the metadata properties section, follow these steps to add the property to the Manage Properties List.

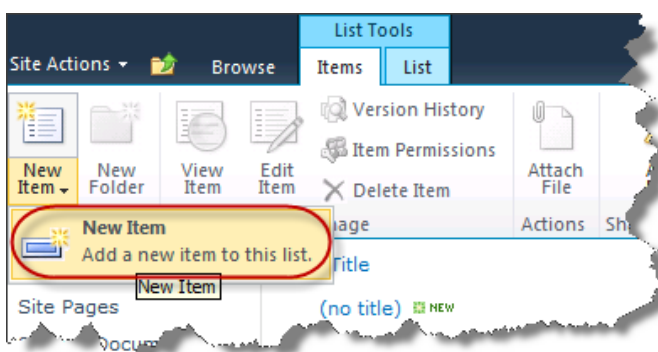
1. On the root of the site collection, click on **All Site Content**



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



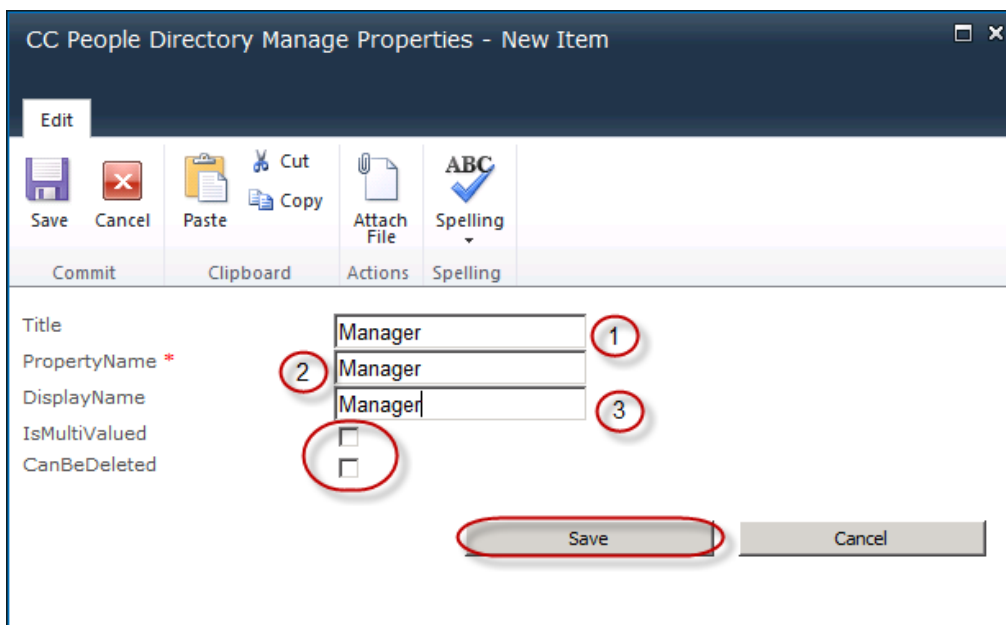
3. Click on **New Item**



4. Enter the following information

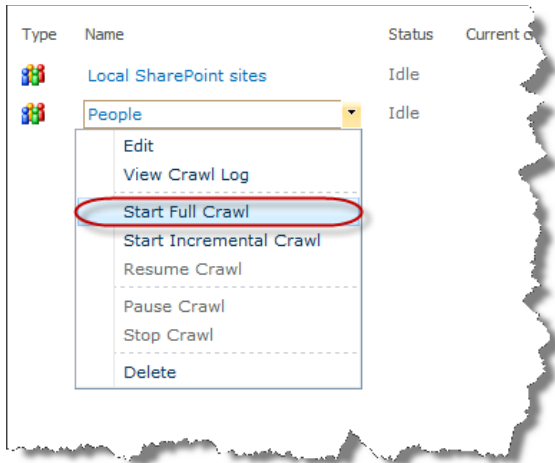
Field	Value
1. Title	The title of the property
2. PropertyName	The property name as entered within the metadata property (Not the display name)
3. DisplayName	How the property will appear within the web part

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 now be available to select within the People Directory web part.