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Employee Directory

User Guide

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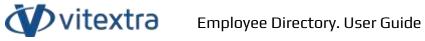
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2. Introduction

2.1 Product Description

Vitextra Employee Directory allows us to search for people within the organization and view detailed information.

Employee Directory supports two types of the data source to search for people:

- SharePoint User Profiles
- Azure AD

The web part is based on the Microsoft SharePoint Framework and is compatible with SharePoint Online. SharePoint on-premise is not supported.

2.2 Product Features

- Search users within Azure AD
- Search users within SharePoint User Profiles
- Display User Presence status
- Microsoft Teams Integration
- Dark Mode for SharePoint and Microsoft Teams
- Create a Single Part App Page support
- View Free/Busy status of the user
- View Recent Documents of the user

3. Installation

3.1 Required Permissions

To perform the installation, you must have the Tenant Admin role assigned to you.

3.2 Software Requirements

Employee Directory Web Part is designed to deploy on Microsoft 365 environment. There is no special software or system requirements.

3.3 API Permissions

Employee Directory uses Microsoft Graph to get data. The following permissions are required for the web part to work:

- User.Read.All
- Directory.Read.All
- Presence.Read.All
- Calendars.Read

First two of them required to get information about users in Azure AD. **Presence.Read.All** required to get user presence information. The last **Calendars.Read** is for getting free/busy status of users¹.

API permission requests must be approved when the Employee Directory will be deployed.

¹ More details about permissions and API endpoints used by the Employee Directory see in the <u>Technical</u> <u>Overview</u> document [2]

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3.4 Product Package

The installation package of the Employee Directory that is available on the download page (<u>https://vitextra.com/en/downloads</u>) contains a single file:

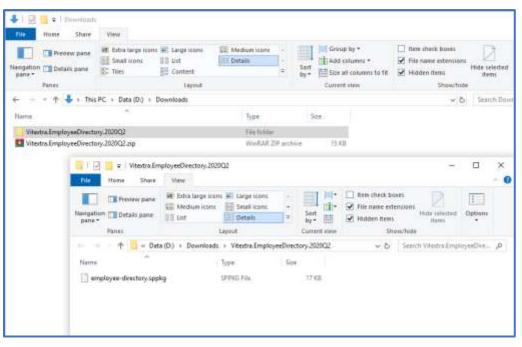


Figure 1. Employee Directory. Installation Package

3.5 Deploy Employee Directory

- 1. Extract downloaded installation package
- From <u>Microsoft 365 admin center</u>, go to SharePoint Admin Center. Select More Features and click the Open button under Apps heading:



	SharePoint admin cente	ar.		۵ @ ٦
=			More features	
ŵ	nome		Access familiar features from the classic SharePoint ad	Imin center.
Ċ	Shea	\mathbb{R}^{2}		
5	Policies		Term store	User profiles
6	Settings	~	Create and manage term sets to help users enter data consistently. Learn more	Add and remove admins for a user's DheDrive, disable DoeDrive creation for some users, and more Learn more
-	Content services	0		THAT IS A SHOT OF THE OWNER
	Migration		Open	Dpen
9 ₀ -	Advanced	\propto		
ŧ	More features		Swarch	Арря
8	OneDrive admin center		Relp users find what they're looking for. Learn more	Configure SharePoint Store settings, monitor app usage, manage app formes, and more, Learn more
1	Customos navigation		Open	Open
	Show all			02

Figure 2. SharePoint Admin Center

3. Select App Catalog

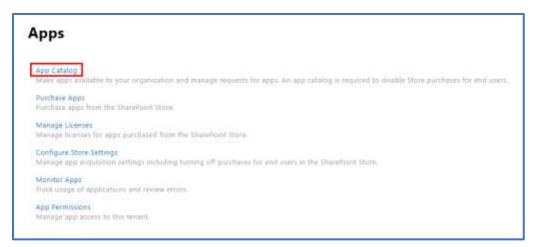


Figure 3. SharePoint Apps Settings

4. Select Apps for SharePoint:



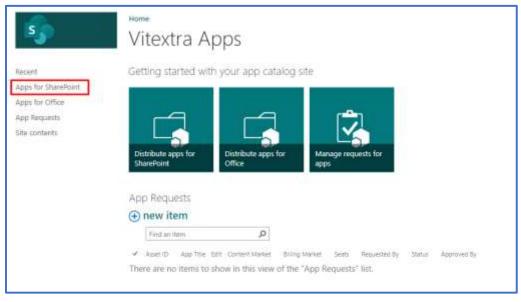


Figure 4. SharePoint App Catalog

5. Upload extracted *vitextra.employee-directory.sppkg* file to the Apps library:

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Appr for ShalePoint	the same of the same same			
Apps for Office				
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			EmployeeDeactory 202022	INCL.
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		Coty	EmployerDorectory 202802	
		Coty	Employed/Vectory 200902 n Wew Registration & Large Formula Large States & Large Formula	Derrict
		Copy	EnglepedDectory 20002 r Wew Inge new Ellage hore sectors Geneticen	Derret Derre
		Copy	EmployedDorctory 2009(2) r View torps core: #1 Longs core: and core: Detail: Larval	Derret Derre

Figure 5. SharePoint App Catalog

 After uploading the package, mark the "Make this solution available to all sites in the organization" checkbox and select Deploy to confirm the operation.



Do you trust Vitextra Employee Directory Web	Part? ×
The client-side solution you are about to deploy contains full trust client side code. The components in the solution can, and usually do, run in full trust, and no resource usage restrictions are placed on them.	5
This client side solution will get content from the following domains:	Vitextra Employee Directory Web Part
https://vitextra-storage.azureedge.net/spfx/	
Make this solution available to all sites in the organization	
Please go to the API Management Page to approve pending permissions. These are the permissions that need to be reviewed: Microsoft Graph, User.ReadBasic.All; Microsoft Graph, User.Read.All; Microsoft Graph, Presence.Read; Microsoft Graph, Presence.Read.All	
	Deploy Cancel

3.6 Approve API Permissions

In SharePoint Admin Center, go to **Advanced** – **API Access** and approve permission requests regarding Employee Directory package.

III SharePoint admi	in center				0	0		RG
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C 1995	ų.	requilits	Sele to Addre Ad-Secured Arts from	e SharePoint Framework components and scripts. Unan	e actor managed	pomin	HON !	
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Settings			.481 marrier	Pactage	Permission			
R Content services	~							
G Myntos			 Organization-wide (3) 					
% Adverced		•	Microsoft Shiph	Wants Tractige Directory Web Part	the faither			
All access			Manual Court	Westeil Employee Girectory West Part	Use Real All			
More features			Nerson Users	Wastra Imployee Directory Web Fact	Presence. Base	LAN:		

Figure 6. SharePoint API Access Settings

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3.7 Sync Employee Directory to Microsoft Teams

To make the web part available for Microsoft Teams, select the app in SharePoint App Catalog and select **FILES** – **Sync to Teams** on the ribbon:

SharePoint								: 0	0	? RG
TROWSE PLES	LIERARY							0	inate 🟠	rouow [c]
New Folder	Balt Document (a) Door & Check Out	G Maria	spe installed Apps	🚯 Sync to Teams	Marage	Share Aler Share & Aler		Workflows	Tago & Notes	5
Recent Apps for SharePe Apps for Office	oint	New All Apps			₿ sha ps	Find a fil			Q	
App Requests		× D	Title	Narre		App Version	Metadata	Ling.oge	Detwurt M	etadata Languag
Site contents		-	Vitextra Employee Directory Web Part	vitextra.employee- directory		24.5.0	English -	1033	Yes	
	8	La	Vitextra Smart Tiles Web	smart-tiles	3000	1.0.4.0	English -	1033	Yes	

Figure 7. SharePoint App Catalog

4. Product Activation

To activate the Employee Directory:

1. Open the <u>My Subscriptions</u> page on the vitextra.com website and sign in to view the list of your subscriptions.

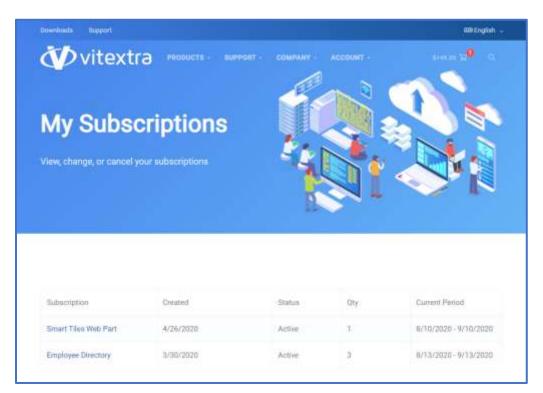


Figure 8. List of Subscriptions

- 2. Select Employee Directory in the list of subscriptions
- 3. Select Assign License button:



Subscription De	tails		Recurring Details
Subscription Employee Directory	Created 3/10/2020	Usage 2 used of 3	60ml 0h/13/2020 - 0h/13/2020 Amount 527 / month Pagment Method: 774.3
License Assignr	nent		EXP. 0/2022 UPDATE
Terumt			Manage Subscription
Name Production Tenantid:0000000-1111-223	12-3333-44444444444	NEMONE	ADDIVENIQVE LICENSES
Name: Sandbox Teruntid:22222222 3333-444	4-5555-66665666666	Chienaldone (1)	

Figure 9. Subscription Details

4. In the dialog, type-in name of your environment and identifier of your tenant² and select **Submit**.

Assign License		×
Name *		
My Company		
TenantId *		
27699663-8b61-4edd-aa94-b2623e82fb0	0b	
How to get Tenant ID		
	CLOSE	SUBMIT
	GLUSE	SUBMIT

Figure 10. Assign License Dialog

² See <u>How to find your Office 365 Tenant ID</u> article in Vitextra knowledgebase [1]

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If activation has been successful, the product status will be automatically changed to **Activated**.

About
Employee Directory Version
2.4.7
Status
Active
Tenant
b15c212a-dc66-4878-9992-90948310589c

Figure 11. Status of Employee Directory Web Part

5. Updating

To update the Employee Directory web part:

- 1. Download the latest installation package from the downloads page
- 2. Extract the package
- 3. Upload the sppkg file to SharePoint App Catalog and replace the existing file



Figure 12. Replace app package confirmation

4. Perform Sync Employee Directory to Microsoft Teams operation if needed

📝 Note

The update of the Employee Directory does not require any additional operations. The updating procedure does not affect your subscription or license — no extra fees or payments.

6. Uninstalling

To uninstall the Employee Directory, go to SharePoint App Catalog and delete the app package:

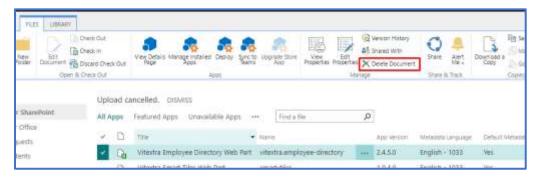


Figure 13. Remove app package from the catalog

7. Employee Directory Setup

7.1 Adding the web part to a page

To add Employee Directory web part to SharePoint page:

- Go to the page where you want to add the Employee Directory web part to. Only the modern page supported.
- 2. Select **Edit** to enter the edit page mode:

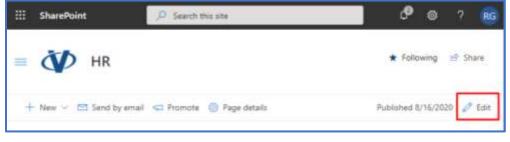


Figure 14. Edit SharePoint page

 Click **Plus** sign in the section where you want to add the web part and select Vitextra Employee Directory:

Search			2
Kecent documents	Saved for later	Site activity	^
		*	
 Sites	Smart Tiles	Spacer	
	Y	4 9 4	
Stream	Twitter	Vitextra	
	0	Employee D	itextra Employee Directory

Figure 15. Select Web Part

7.2 Creating a Single Part App Page

To create an Employee Directory single part app page:

1. Select New – Page:

		✓ Search this site
Ξ	■ 🚺 HR	
	+ New \vee 🖂 Send by email	I 🥽 Promote 👹 Page details
	Page	
	Copy of this page	ectory

Figure 16. New Page Menu Item

2. Switch to **Apps** tab and select **Vitextra Employee Directory** in the list of web parts. Then click **Create page** to create a new page:



Pages	Vitextra Employee Directory
17. 	
Templates Apps	Search employees within your organization
Featured	
News Smart Tile	
Aggregator	
Vitextra Employee	
Directory	

Figure 17. Creating a Single App Part Page

7.3 Add the Web Part to Teams Channel

To add Employee Directory to Microsoft Teams channel:

 In the channel where you want to add Employee Directory select **Plus** sign on the tabs:

	Microsoft Teams	ø	Q, Search
Aziwiy	Teams	∇	💓 HR Posts Files Wiki 🕂
E Out	Your teams		+ New 🗸 T Upload 🗸 🖓 Sync 🤏 Copy link …
iji Turni	witextra General		HR
-	HR		[[*]] Name ∽ Modified ∽

Figure 18. Adding Tab to Microsoft Teams Channel

2. Find Vitextra Employee Directory in the list of available apps:



Nore appli			s at the top of t	he channel	Sealth	q
Recent +						
-0-	1	J	F	۶	-	×
Viteotta Employee	Planner	OseNote	Wiki	Stream	Document Library	Excel
1	۵	Gul	۲	5)	-	⊕
Farms	PDF	Power BI	PowerPaint	ShirePoint	Visio	Website
C						

Figure 19. Teams App Catalog

3. Confirm the action by clicking the **Save** button:



Figure 20. Adding the app confirmation

7.4 Add the Web Part as Personal App in Teams

To add Employee Directory to Microsoft Teams as a personal app:

1. Select "..." sign in the right navbar to see available apps and click **More apps**:

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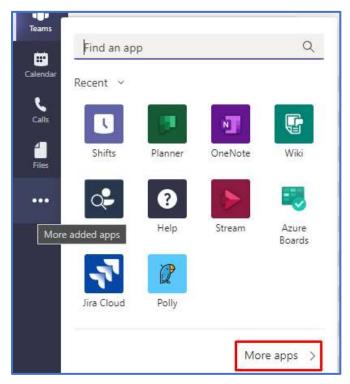


Figure 21. Adding a personal app to Microsoft Teams

2. Search Vitextra Employee Directory in the Apps gallery and select it:

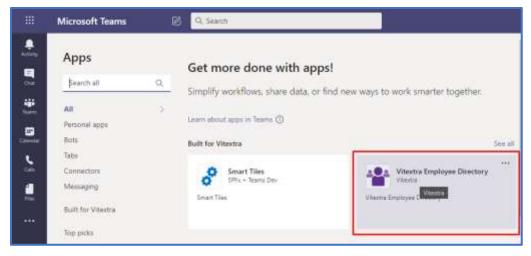


Figure 22. Apps Gallery

3. Click **Add** button to add the web part as a personal app:



Vitextra Employee Directory Vitextra			
Add -	Vitextra Employee Directory		
About	Taba		
More from Vitextra	Use in a tab at the top of a chat or channel		
Parmizaiona	Personal app Keep track of important content and info		

Figure 23. Confirmation of adding personal app

📝 Note

Vitextra Employee Directory in personal app mode does no support configuration. Therefore, the app works with default settings.

8. Employee Directory Configuration

8.1 Data Source

Employee Directory supports two types of data source:

User Profiles

A Search-based data source. All the data comes from SharePoint User Profiles service.

Azure AD

Azure Active Directory – cloud-based identity service provider and access management service.

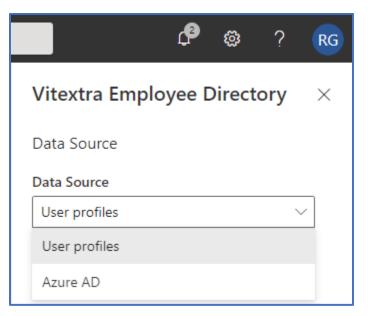


Figure 24. Select Data Source for the Web Part



Table 1. Comparison of the data sources

	User Profiles	Azure AD
Searchable attributes	All public properties of the user profile	Only the attributes listedbelow:• employeeld• department• jobTitle• jobTitle• givenName• surname• mail• state• city• country
Excluding disabled accounts	In some cases, it is necessary to do additional work on the part of administrators ³	design
Keyword Query Language⁴	Supported	Not supported
Search Analytics to provide more relevant data		

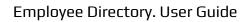
8.2 Columns

You can customize the columns in the details view, as well as their order and labels.

³ See article "<u>Exclude accounts from search results</u>" from Vitextra knowledgebase [3]

⁴ More information about KQL (Keyword Query Language) - <u>https://docs.microsoft.com/en-us/sharepoint/dev/general-development/keyword-query-language-kql-syntax-reference</u>

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	iluble Column	Caption.*	
1 ~ I	✓ Image	Image	* 0 ×
2 ~	Full Name	Full Name	• 0 ×
3 ~ 1	iob Title	Job Title	* 0 ×
4 ~ 1	Department	Department	• 0 ×
s ~ 1	Location	Location	• 0 ×
6 ~ 1	Email	Enall	• 00 ×
r ~ (1	Business Phone	Business Phone	• 0 ×
8 ~ I	Office Location	Office Location	• 0 ×
9 ~ [Phone	Phone	• 0 ×
10 ~ 1	Home Phone	Home Phone	• 0 ×

Figure 25. Configure columns for Details view

8.3 Predefined Query

Ovitextra

Predefined query used to set default search query that applied by default. In the case of user search, the predefined query appended to it.

If you use User Profiles as a data source, you able to define KQL⁵ to meet your requirements. Some samples of using the predefined query:

Table 2. Sample predefined queries

Requirement	Predefined Query
Exclude employees from a specific	-Department:"Sales Deparment"
department (ex. "Sales Department")	
Show employees only from a specific	Department:"Sales Deparment"
department	
Exclude employee which job title is empty	-JobTitle:""
Show everyone employee	*

⁵ Keyword Query Language

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Show employee which given name starts **FirstName:**"A*"

with "A"

You can combine queries to specify the search scope.

8.4 View

Employee Directory supports two types of layout:

Contact

Each search result presented by persona card with the following employee information:

- Profile picture
- Full Name
- Job Title
- Department

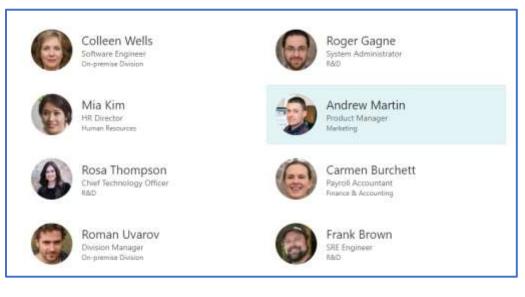


Figure 26. Contact View of search results

Details

Tabular view of the search results. Columns of the table customizable via Columns settings.

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P share	epoint X		
al number of	fresulta 29		
8	Full Name	Job Title	Department
0	Colleen Wells	Software Engineer	On-premise Division
0	Roger Gagne	System Administrator	1AD
	Mia Kim	HR Divertor	Human Rasources
3	Andrew Martin	Product Managar	Marketing
	Rosa Thompson	Chief Technology Officer	Rad
	Carmen Burchett	Payroli Accountant	Finance & Accounting
9	Roman Uverov	Division Manager	On-premise Division
0	Frank Brown	SRE Engineer	R&O

Figure 27. Details View

8.5 Page Size

You can specify the number of items to display on the page. Users can load more data with the **Load more data** button presented under the search results.

9. References

- [1] Vitextra SIA, "How to find your Office 365 Tenant ID," 30 3 2020. [Online]. Available: https://vitextra.com/en/support/kb/10034.
- [2] Vitextra SIA, "Employee Directory. Technical Overview," 14 8 2020. [Online]. Available: https://vitextra.com/docs/Employee%20Directory.%20Technical%20Overview.pdf.
- [3] Vitextra SIA, "Exclude accounts from search results," 8 8 2020. [Online]. Available: https://vitextra.com/en/support/kb/10045.