KNOWLEDGE BASE ARTICLE

How to Add and Configure the Employee Directory Web Part

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This article walks through the first steps with the Vitextra Employee Directory web part: adding it to a modern **SharePoint Online** page and configuring the main settings of the property pane - the data source, columns, sorting, page size, the search box and totals. At the end you will find an overview of the other property pane groups with links to the articles that cover them in detail.

Before you begin

Before you add the **web part** to a page, make sure that:

- **The Employee Directory solution is installed** in the **tenant app catalog**. The procedure is described in KB10035. How to Install a Vitextra Product in SharePoint Online.
- **permissions are approved.** The solution requests the **Directory.Read.All**, **User.Read.All**, **Presence.Read.All**, **Calendars.Read** and **People.Read** permissions. A global administrator approves them on the **API access** page of the **SharePoint admin center**.
- **You can edit the page** - the **Edit permission level** or membership in the **site**'s Members group is enough.

Warning

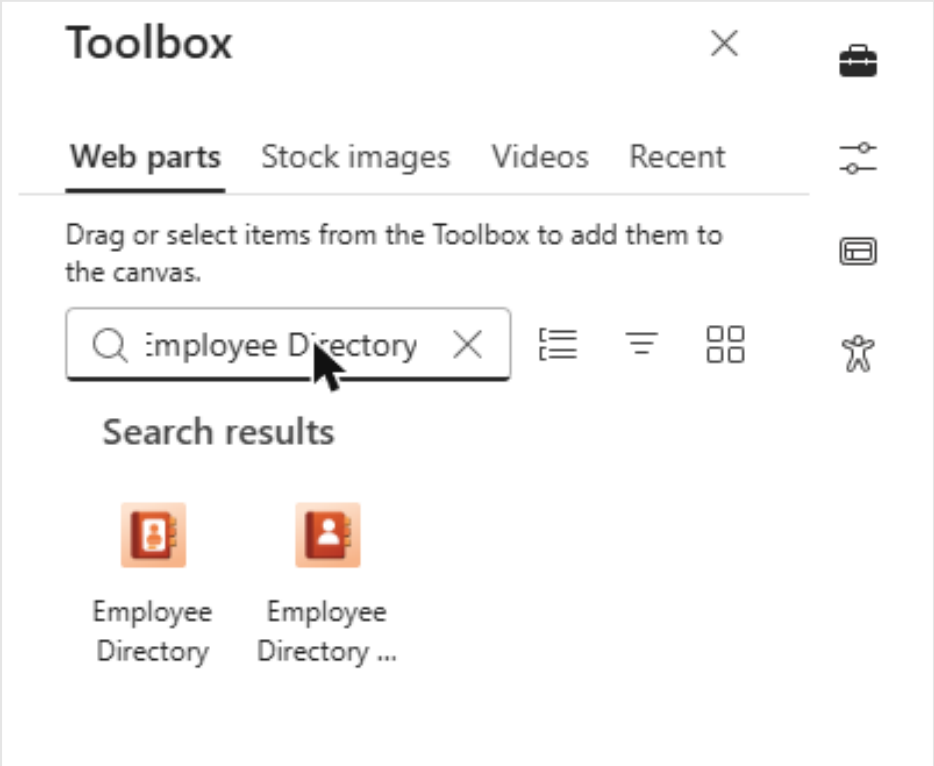
Until the Microsoft Graph permissions are approved, the web part cannot read data from **Microsoft Entra ID**: the **Entra ID** data source returns no people, and presence, availability and the **People I work with** quick filter do not work.

Note

The solution contains two directory web parts: **Employee Directory**, described here, and **Employee Directory (Entra ID)**, which adds a filter editor, exclusions and A–Z navigation. To decide which one fits your scenario, see KB10310. Employee Directory vs. Employee Directory (Entra ID): Which Web Part to Choose.

Adding the web part to a page

1 Open the page and click **Edit** in the top-right corner.
2 Hover over the place where the directory should go until a line with a **+** sign appears, and click it to open the web part toolbox.
3 Type *Employee Directory* in the search box and select **Employee Directory**.



Employee Directory in the web part toolbox

The web part appears on the page and immediately shows the employees of your organization using the default settings. To change the settings, click the pencil icon (**Edit web part**) on the left of the web part - the property pane opens on the right. Its groups are shown as an accordion: click a group name to expand it.

Note

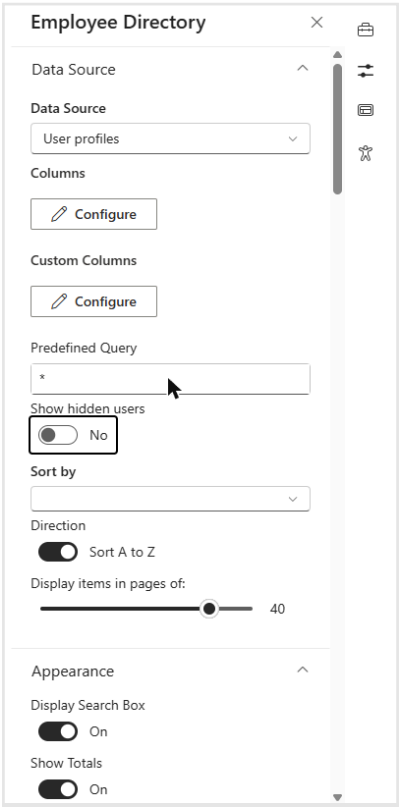
On sites with a non-English language the web part may appear in the toolbox under its localized name - for example, *Справочник Сотрудников* in Russian or *Mitarbeiterverzeichnis* in German.

Choosing the data source

The first group of the property pane, **Data Source**, defines where the web part takes employee data from. Select one of the two values in the **Data Source** dropdown:

- **User profiles** (the default) - people are found through SharePoint search in the SharePoint user profiles. This source supports the predefined query (KQL), hidden profiles and the refinement panel.
- **Entra ID (Azure AD)** - people are read directly from Microsoft Entra ID through Microsoft Graph. Only enabled member accounts are shown; guest accounts are excluded.

The rest of the **Data Source** group changes depending on the selected source: some options are available only for **User profiles**, others only for **Entra ID (Azure AD)**. These are described below.



The Data Source group with the User profiles source

Tip

Choose **User profiles** when your directory relies on SharePoint profile properties, KQL queries or the refinement panel. Choose **Entra ID (Azure AD)** when the data in Microsoft Entra ID is the most complete and up to date, or when you need search by skills.

Columns and custom columns

Under the source selector there are two **Configure** buttons:

- **Columns** - opens the **list** of built-in employee properties (name, job title, department, phone numbers, office location and others). For each property you can choose whether it is shown in the list (**Show in list**) and on the person's card (**Show on card**), change its **Caption** and set its **Order**.
- **Custom Columns** - lets you add properties that are not in the built-in list: custom SharePoint **user profile** properties or custom Microsoft Entra ID attributes. Click **Add**

new item, enter the property name and its caption, then save.

The configured columns are also used elsewhere in the web part: they are offered in the **Content Fields** of the cards and in the **Group by** dropdown.

Tip

Step-by-step instructions for custom properties are in KB10049. How to Add Custom User Profile Attributes to the Employee Directory Web Part (User Profiles) and KB10060. How to Display Custom Entra ID Attributes in the Employee Directory Web Part (Microsoft Entra ID).

Options of the User Profiles source

When the source is **User profiles**, the **Data Source** group contains two more settings:

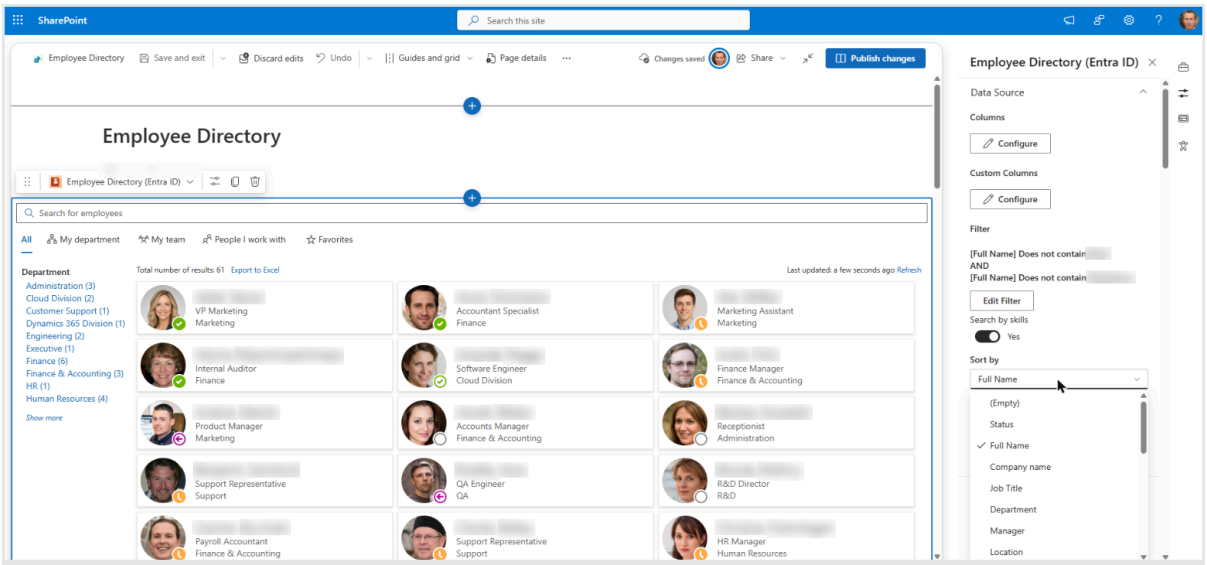
- **Predefined Query** - a KQL (Keyword Query Language) condition that is added to every search the web part runs, including the initial list. Use it to limit the directory to a part of the organization, for example `Department:"Sales"` to show only the sales department or `(Department:"Sales" OR Department:"Marketing")` to show two departments. The default value `*` means no restriction.
- **Show hidden users** - by default the web part does not show profiles that are hidden from address lists. Turn this option on to include them. Service accounts (such as *app@sharepoint* or _ accounts) are always excluded.

Note

The predefined query is combined with whatever the user types in the search box, so people can only search within the part of the directory that the query allows. A query with a syntax error returns no results - test it on the page before publishing.

Options of the Entra ID source

When the source is **Entra ID (Azure AD)**, the predefined query and **Show hidden users** are not available. Instead, the group contains the **Show only users with non-empty department** toggle. It is turned on by default, which hides accounts without a department - typically shared mailboxes, meeting rooms and technical accounts that are not real employees. Turn it off to show every enabled member account.



The Data Source group with the Entra ID source

The **Search by skills** toggle, also in this group, adds people whose profile skills match the search text to the results. It is turned on by default and takes effect with the **Entra ID (Azure AD)** source. See KB10316. How to Search Employees by Skills in Employee Directory.

Note

For more precise filtering by Microsoft Entra ID attributes - for example, by company, country or employee type, or to exclude unlicensed and disabled accounts - use the **Employee Directory (Entra ID)** web part. See KB10311. How to Configure the Employee Directory (Entra ID) Web Part: Filters, Exclusions and A–Z Navigation.

Sorting and page size

Three settings at the end of the **Data Source** group define the order of the results and how many are loaded at once:

- **Sort by** - the field the results are sorted by. The list of fields depends on the source: **(Default)**, **First Name** and **Last Name** for **User profiles**; **(Default)** and **Full Name** for **Entra ID (Azure AD)**. With **(Default)**, User Profiles results are sorted by search relevance, and Entra ID results are returned in the order Microsoft Graph provides.
- **Direction** - **Sort A to Z** (the default) or **Sort Z to A**.
- **Display items in pages of** - how many people are loaded at a time, from 1 to 50 (the default is 40). When there are more results, a **Show More Results...** button appears under the list and loads the next portion.

Tip

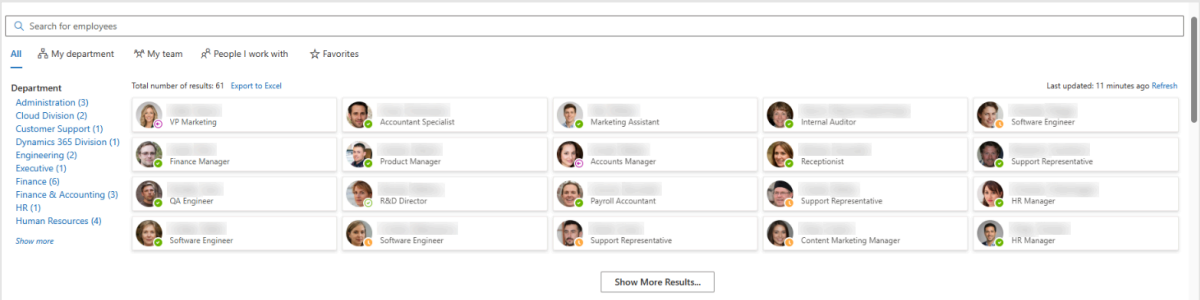
A smaller page size makes the first load faster on large directories; a larger one means users click **Show More Results...** less often. For directories of several thousand employees, a value between 20 and 40 is usually a good balance.

Search box and totals

Two toggles at the top of the **Appearance** group control the elements above the results:

- **Display Search Box** - shows or hides the search box. Turn it off when the web part should show a fixed list, for example the members of one department defined by the predefined query.
- **Show Totals** - shows or hides the number of people found.

Both are turned on by default.



The configured web part on a page

Other settings

The remaining groups of the property pane are described in separate articles:

Group	What it configures	More information
Appearance	The **view** (**Details** or **Contact** cards), **Group by**, card **Size** and **Compact List**	KB10314. Employee Directory Layouts: Details and Cards, Card Size, Card Fields and Group By
Quick Filters	Which quick filters are shown: My department, My team, People I work with, Favorites	KB10214. Employee Directory Quick Filters: My Department, My Team, People I Work With, Favorites

Group	What it configures	More information
Content Fields	The fields shown on each card (available in the **Contact** view)	KB10314. Employee Directory Layouts: Details and Cards, Card Size, Card Fields and Group By
Panel	The sections of the details pane: manager, direct reports, availability, local time and working hours, documents, about me, interests, skills	KB10199. Employee Directory: Customizing the Details Pane, KB10317. Employee Directory: Local Time, Working Hours and Availability
Context Menu and **Quick Actions**	Which actions are offered in the context menu and as buttons on the card: chat, call, email, copy email, schedule a meeting, vCard	KB10315. Employee Actions in Employee Directory: Chat, Call, Email, Copy Email, Schedule a Meeting and vCard
Export	Export of the results to a Microsoft Excel spreadsheet	KB10062. How to Export Employee Directory Results to Microsoft Excel
Refinement Panel	The panel with refiners and its position (only for the **User profiles** source)	KB10313. How to Set Up the Refinement Panel in Employee Directory
)	**Save Settings** saves the current configuration as the tenant default used by the Employee Directory personal app in Microsoft Teams	-
About	License status and product information	KB10206. Vitextra Licensing and Account: How to Buy and Activate a License

Note

The **Refinement Panel** group is shown only when the source is **User profiles**. The **Personal app (Microsoft Teams)** group is not shown when the page is opened inside Microsoft Teams.

Saving the page

The settings take effect on the page as soon as you change them, so you can check the result before publishing. When the directory looks as expected, click **Republish** (or **Publish** for a new page) to make the changes visible to everyone.

Tip

To give the directory a page of its own, without other web parts, see KB10040. How to Create a Single App Page with Vitextra Employee Directory.

Terms

App Catalog
The App Catalog is a special SharePoint site that stores apps for SharePoint, Teams, and other Microsoft 365 services. Global or SharePoint administrators can upload and manage applications from the AppSource marketplace, custom-developed apps, or third-party apps for the organization's internal use. There can be only one tenant-level App Catalog in a tenant; site collection app catalogs can be added for individual site collections.

List
A list is a storage unit in SharePoint. A list can contain columns of different types, content types, and views. A document library is a special type of list and therefore inherits the functionality of a list.

Microsoft Entra ID
Microsoft Entra ID (formerly Azure Active Directory) is a cloud-based identity and access management service offered by Microsoft. It allows organizations to efficiently manage and secure their users' identities and access to a variety of resources, both internal and external. These resources include Microsoft 365, the Azure platform, and thousands of other software-as-a-service (SaaS) applications.

Permission Level
A permission level is a named set of permissions, such as Read, Edit, or Full Control, that can be assigned to users and groups on a SharePoint site, list, library, or item.

SharePoint Admin Center
The SharePoint admin center is the web portal where SharePoint administrators manage sites, sharing and access settings, the App Catalog, storage, and other SharePoint Online settings for the tenant.

SharePoint Online
The cloud version of SharePoint, a web-based collaboration platform within Microsoft 365 that provides an extensive range of capabilities to store, share, and manage the digital information, content, and knowledge of an organization.

Site

Terms

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

Tenant
A Microsoft 365 tenant is a dedicated instance of Microsoft 365 services. The tenant holds the organization's information, such as users and domains (Microsoft Entra ID), configurations, subscriptions, and services. An organization receives a tenant by signing up for Microsoft 365 services.

User Profile
A user profile is a set of properties that describe a user. The properties include basic information about the user, contact details, and other data. The user profile is used by services such as Delve, My Site, and others.

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

Web Part
A web part is a primary building block of functionality or content placed on a SharePoint page. Some web parts support customization, such as configuring the web part or changing its appearance.