



USER GUIDE

Employee Directory

Contents

| | |
|---|----|
| Employee Directory | 1 |
| Introduction/Overview..... | 3 |
| Getting Started/Prerequisite | 3 |
| All | 3 |
| My Team..... | 4 |
| Export | 4 |
| Export to PDF or Excel: | 4 |
| Customize Columns..... | 5 |
| Exported Columns | 5 |
| Editing Column Names..... | 5 |
| Deleting Columns | 6 |
| Filters in All Tab | 6 |
| Logged-in User | 8 |
| Middle Section of Home Page | 9 |
| Using Filters | 9 |
| Employee View | 9 |
| Employee Details | 10 |
| Using the Application | 11 |
| Manage App Configurations..... | 12 |
| Visual Customization..... | 12 |
| Accessing the Visual Customization tab..... | 13 |
| Light/Dark Mode..... | 13 |
| Header Fields Customization | 14 |
| Preview Section | 17 |
| Apply/Close Button | 18 |
| ED Filters Configuration | 19 |
| Accessing the ED Filters tab | 19 |
| Configuration Tab..... | 19 |
| Filters Tab | 22 |
| Apply/Close Button | 26 |
| User Profile Settings | 27 |
| Accessing the User Profile tab | 27 |
| Apply/Close Button | 29 |
| ED Group: | 30 |

Introduction/Overview

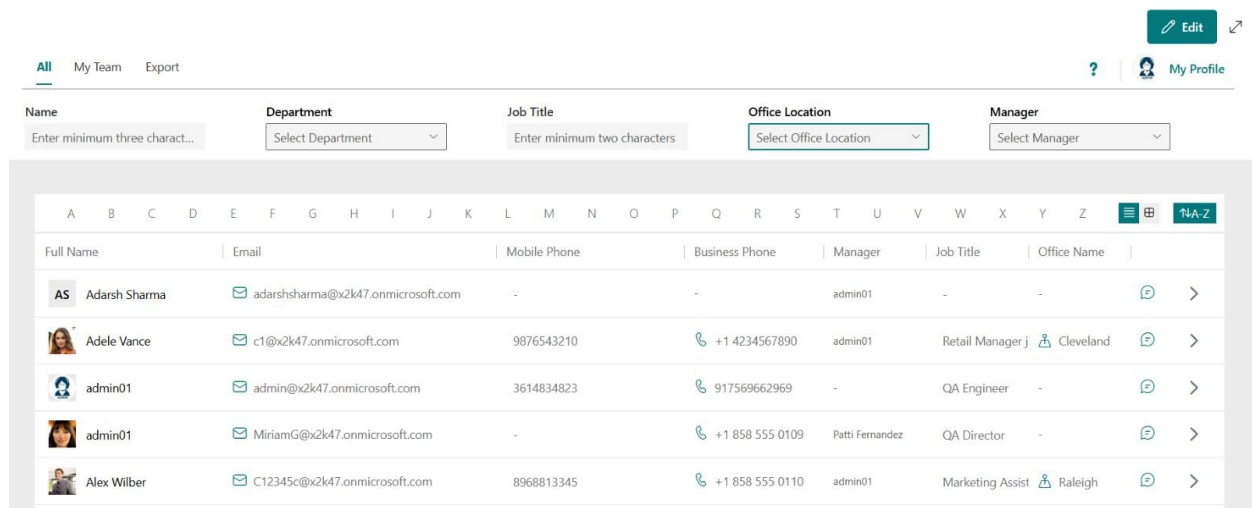
Welcome to the Employee Directory Application! This guide will walk you through the features and functionality of our application, designed to help you efficiently navigate and connect with employees within your organization.

The Employee Directory application is a SharePoint Framework (SPFx) web part that allows you to view and interact with employee information in both list and grid formats. You can easily find employees, view their details, and initiate communication through various channels.

Getting Started/Prerequisite

When you first access the Employee Directory:

- Ensure you are logged into your SharePoint environment.
- Navigate to the page where the Employee Directory web part is added.



The Employee Directory web part includes a navigation bar at the top, offering various options to help users efficiently navigate and interact with employee information.

All

- **Purpose:** Displays a comprehensive list of all employees within the organization.
- **Usage:** Clicking on "All" will load and display all employee profiles available in the directory.

My Team

- **Purpose:** Filters and displays employees who are part of the current user's team.
- **Usage:** Users see a refined list of employees specifically assigned to their team, facilitating team management and collaboration.

[All](#) [My Team](#) [Export](#)

[?](#) [My Profile](#)

Name

Enter minimum three characters

Department

Select Department

Job Title

Enter minimum two characters

Office Location

Select Office Location

| 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 | | | |
|------------------|------------------------------------|--------------|-----------------|---------|----------------|-------------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|--|--|--|
| Full Name | Email | Mobile Phone | Business Phone | Manager | Job Title | Office Name | | | | | | | | | | | | | | | | | | | | | | |
| AS Adarsh Sharma | adarshsharma@x2k47.onmicrosoft.com | - | - | admin01 | - | - | | | | | | | | | | | | | | | | | | | | | | |
| Patti Fernandez | PattiF@x2k47.onmicrosoft.com | - | +1 502 555 0144 | admin01 | President | - | | | | | | | | | | | | | | | | | | | | | | |
| SS Sarath | use@2x2k47.onmicrosoft.com | 324864584 | - | admin01 | Lead Architect | - | | | | | | | | | | | | | | | | | | | | | | |

Export

- **Purpose:** Enables users to export organizational data into PDF or Excel format for offline use or sharing.
- **Usage:** Provides options to customize columns in the organizational hierarchy, and refine exported data.

Export to PDF or Excel:

- **Purpose:** Choose the desired format (PDF or Excel) for exporting organizational data.
- **Usage:** Select the preferred format to generate a downloadable file containing structured employee information.

[All](#) [My Team](#) [Export](#)

[?](#) [My Profile](#) [Edit](#)

Name

Enter minimum three charact...

Department

Select Department

Job Title

Enter minimum two characters

Office Location

Select Office Location

Manager

Select Manager

Export Options

Export*

Select an option

Excel

PDF

Export Data Preview

| displayName | jobTitle | officeLocation |
|---------------|--------------------------|----------------|
| Adarsh Sharma | | BDN |
| Adele Vance | Retail Manager job title | CLE |
| admin01 | QA Engineer | BDN |

Customize Columns

Edit Column Names and Selection:

- **Purpose:** Modify column headers and choose which fields to include in the export.
- **Usage:** Allows customization of exported data by adjusting column names and selecting relevant fields based on reporting needs.

Exported Columns

Default Exported Fields:

- **Purpose:** Lists default fields included in the export (e.g., ID, Display Name, Department, Job Title, Business Phone, Email, Manager, User Principal Name, Employee ID).
- **Usage:** Offers options to select or deselect columns to tailor exported data according to user requirements.

The screenshot shows a 'Customize Columns' interface. On the left, the 'Export Options' panel has a dropdown for 'Export *' set to 'PDF'. Below it, 'Selected fields' shows 'displayName, jobTitle, department'. A red note states 'Max 6 fields can be selected.' At the bottom, 'displayName' is listed with 'Edit' and 'Delete' links. In the center, the 'Export Data Preview' panel shows a list of fields with checkboxes: 'id' (unchecked), 'displayName' (checked), 'officeLocation' (unchecked), 'jobTitle' (checked), 'mail' (unchecked), 'department' (checked), 'mobilePhone' (unchecked), 'businessPhones' (unchecked), 'userType' (unchecked), and 'userPrincipalName' (unchecked). On the right, a data preview table shows columns 'Title' and 'Department' with sample data.

| Title | Department |
|-----------------|------------|
| l Manager | Retail |
| eting Assistant | Marketing |
| anager | HR |
| gner | R&D |
| loper | R&D |
| : Rep | Sales |




Editing Column Names

Customize Column Headers:

- **Purpose:** Modify the names of exported columns to align with specific reporting formats or organizational standards.
- **Usage:** Allows users to rename columns for clarity and consistency in exported reports.

[All](#)
[My Team](#)
[Export](#)
?
My Profile

Name:
 Department:
 Job Title:
 Office Location:
 Manager:




| 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 |
|---|------------------------------|--------------|-----------------|--------------|------------------|-------------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Full Name | Email | Mobile Phone | Business Phone | Manager | Job Title | Office Name | | | | | | | | | | | | | | | | | | | |
|  Adele Vance | c1@x2k47.onmicrosoft.com | 9876543210 | +1 4234567890 | admin01 | Retail Manager j | Cleveland | | | | | | | | | | | | | | | | | | | |
|  Diego Siciliani | DiegoS@x2k47.onmicrosoft.com | - | +1 205 555 0108 | Nestor Wilke | HR Manager | - | | | | | | | | | | | | | | | | | | | |
|  Lidia Holloway | LidiaH@x2k47.onmicrosoft.com | - | +1 918 555 0107 | Lee Gu | Product Manage | - | | | | | | | | | | | | | | | | | | | |

- **Office Location:** Dropdown menu for filtering employees by their office locations.

[All](#)
[My Team](#)
[Export](#)
?
My Profile

Name:
 Department:
 Job Title:
 Office Location:
 Manager:

Office Location:





| 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 |
|---|-------------------------------------|--------------|-----------------|---------|------------------|-------------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Full Name | Email | Mobile Phone | Business Phone | Manager | Job Title | Office Name | | | | | | | | | | | | | | | | | | | |
|  Adele Vance | c1@x2k47.onmicrosoft.com | 9876543210 | +1 4234567890 | admin01 | Retail Manager j | Cleveland | | | | | | | | | | | | | | | | | | | |
|  Alex Wilber | C12345c@x2k47.onmicrosoft.com | 8968813345 | +1 858 555 0110 | admin01 | Marketing Assist | Raleigh | | | | | | | | | | | | | | | | | | | |
|  rishi test@12 | rishi_test_12@x2k47.onmicrosoft.com | - | - | - | BSA | Cleveland | | | | | | | | | | | | | | | | | | | |

- **Manager:** Dropdown menu for filtering employees by their manager's name.

[All](#)
[My Team](#)
[Export](#)
?
My Profile

Name:
 Department:
 Job Title:
 Office Location:
 Manager:

Manager:


| 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 |
|---|------------------------------------|--------------|-----------------|---------|------------------|-------------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Full Name | Email | Mobile Phone | Business Phone | Manager | Job Title | Office Name | | | | | | | | | | | | | | | | | | | |
|  Adarsh Sharma | adarshsharma@x2k47.onmicrosoft.com | - | - | admin01 | - | - | | | | | | | | | | | | | | | | | | | |
|  Adele Vance | c1@x2k47.onmicrosoft.com | 9876543210 | +1 4234567890 | admin01 | Retail Manager j | Cleveland | | | | | | | | | | | | | | | | | | | |
|  Alex Wilber | C12345c@x2k47.onmicrosoft.com | 8968813345 | +1 858 555 0110 | admin01 | Marketing Assist | Raleigh | | | | | | | | | | | | | | | | | | | |
|  Grady Archie | GradyA@x2k47.onmicrosoft.com | - | +1 309 555 0104 | Lee Gu | Designer | - | | | | | | | | | | | | | | | | | | | |

- **Department:** Dropdown menu for filtering employees by their departments.

[All](#)
[My Team](#)
[Export](#)
[Filters](#)
?
My Profile

Name
 Job Title
 Office Location
 Id
 HR

Department: HR Clear All











| 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|------------|---|---|---|----------------------|---|---|---|------------|---|---|---|---|---|
| Full Name | | | | | | | | | | | | Department | | | | Base Office Location | | | | Job Title | | | | | |
|  Diego Siciliani | | | | | | | | | | | | HR | | | | 14/1108 | | | | HR Manager | | | | | |

- **Combined Filters:** Allows combining multiple criteria for more refined searches.

[All](#)
[My Team](#)
[Export](#)
?
My Profile

Name
 Department
 Job Title
 Office Location
 Manager

Department: Marketing Retail department
 Office Location: Cleveland Raleigh Bel Air
 Manager: admin01 Adarsh Sharma
Clear All

| 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 |
|---|---|---|---|--------------|---|---|---|---------|---|------------------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Full Name | | Email | | Mobile Phone | | Business Phone | | Manager | | Job Title | | Office Name | | | | | | | | | | | | | |
|  Adele Vance | |  c1@x2k47.onmicrosoft.com | | 9876543210 | |  +1 4234567890 | | admin01 | | Retail Manager j | |  Cleveland | |  | | | | | | | | | | | |
|  Alex Wilber | |  C12345c@x2k47.onmicrosoft.com | | 8968813345 | |  +1 858 555 0110 | | admin01 | | Marketing Assist | |  Raleigh | |  | | | | | | | | | | | |

Logged-in User

Display and Interaction:

- **Purpose:** Shows the name and photo of the currently logged-in user.
- **Usage:** Clicking on the logged-in user's name or photo opens a side panel displaying detailed information about the user, similar to how employee details are displayed.













SharePoint


spfx4-2

Home Documents Pages Site contents Edit

[All](#)
[My Team](#)
[Export](#)

Name
 Department
 Job Title
 Office Location

| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V |
|---|---|--|---|--------------|---|---|---|-----------------|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Full Name | | Email | | Mobile Phone | | Business Phone | | Manager | | | | | | | | | | | | | |
| AS Adarsh Sharma | |  adarshsharma@x2k47.onmicrosoft.com | | - | | - | | admin01 | | | | | | | | | | | | | |
|  Adele Vance | |  c1@x2k47.onmicrosoft.com | | 9876543210 | |  +1 4234567890 | | admin01 | | | | | | | | | | | | | |
| admin01 | |  admin@x2k47.onmicrosoft.com | | 3614834823 | |  917569662969 | | - | | | | | | | | | | | | | |
|  admin01 | |  MiriamG@x2k47.onmicrosoft.com | | - | |  +1 858 555 0109 | | Patti Fernandez | | | | | | | | | | | | | |
|  Alex Wilber | |  C12345c@x2k47.onmicrosoft.com | | 8968813345 | |  +1 858 555 0110 | | admin01 | | | | | | | | | | | | | |





Adele Vance
Retail Manager job title
Retail department | CLE

Work Information

Job Title : Retail Manager job title

Department : Retail department

Manager :  admin01

Reportees : 

Work Phone : 9876543210

Close

Middle Section of Home Page

Using Filters



- **Alphabetical Filters:** Use the alphabetical filters in the navbar to quickly find employees by their names. Clicking on a specific letter filters the list/grid view accordingly.

Navigation: [All](#) | [My Team](#) | [Export](#) | [?](#) | [My Profile](#)

Filters:

- Name: Enter minimum three characters
- Department: Select Department
- Job Title: Enter minimum two characters
- Office Location: Select Office Location
- Manager: Select Manager

Alphabetical Filter: 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

| Full Name | Email | Mobile Phone | Business Phone | Manager | Job Title | Office Name |
|--|--------------------------------|--------------|-----------------|-------------|-----------|-------------|
|  GM Gowtham Maguluri | gowtham@7nmk54.onmicrosoft.com | - | - | Adele Vance | - | - |
|  Grady Archie | GradyA@x2k47.onmicrosoft.com | - | +1 309 555 0104 | Lee Gu | Designer | - |

Employee View

The Employee Directory supports two main views:

- **List View:** Displays employees in a list format with columns including Full Name, Department, Base Office Location, and Job Title. Each employee entry includes icons for calling, messaging, and emailing them directly.

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

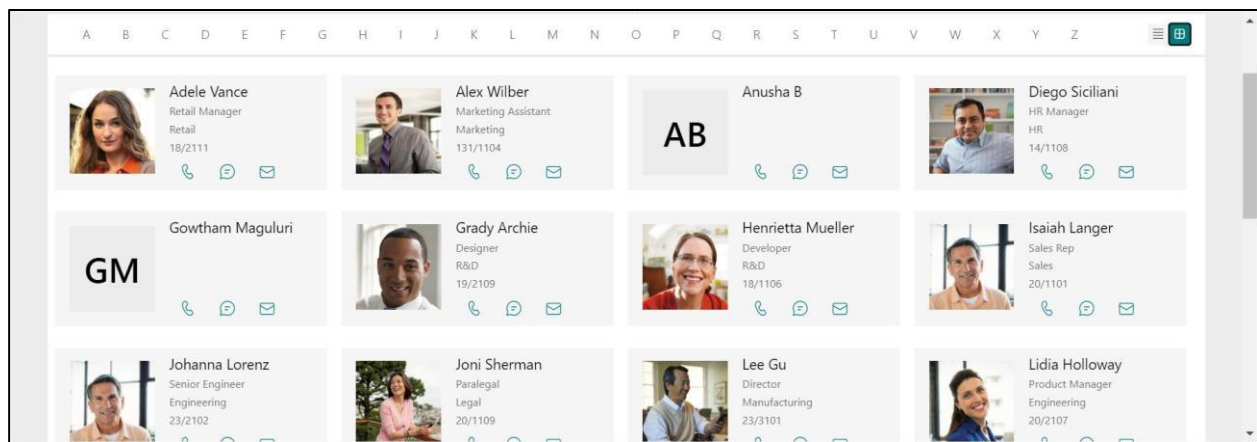
X

Y

Z

</

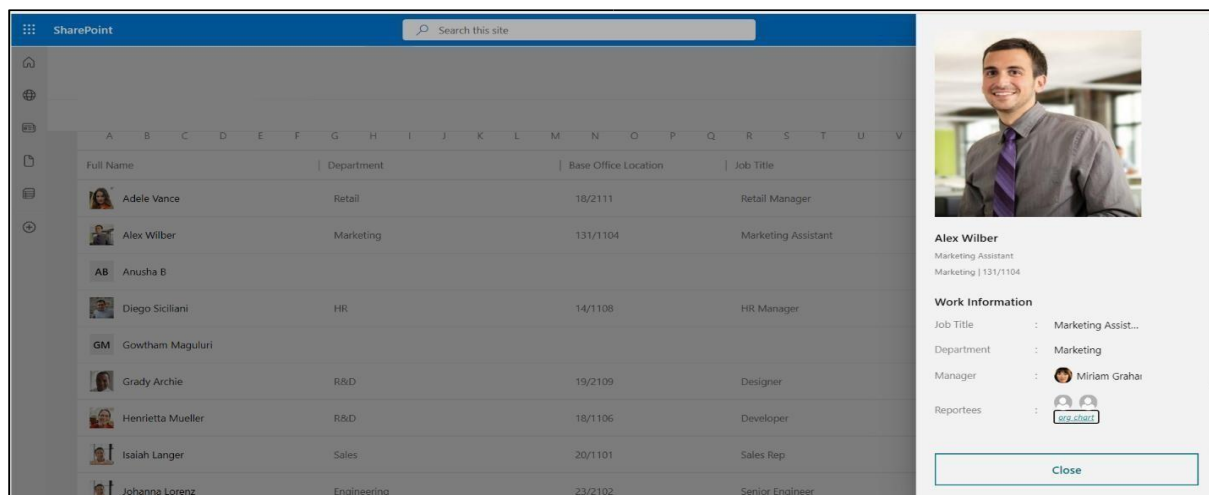
- **Grid/Card View:** Presents employees in a card-like format, where each card includes the employee's photo, name, department, base office location, job title, and icons for calling, messaging, and emailing. This view also supports visual customizations such as node background color and text color.



Employee Details

Clicking on an employee's name in either view, opens a side panel with detailed information categorized into:

- **Work Information:**
 - Job Title
 - Department
 - Manager
 - Reportees
 - Office Location
 - Work Email
 - Branch Phone
 - Work Phone



- **Personal Information:**
 - o About Me
 - o Interests
 - o School



Using the Application

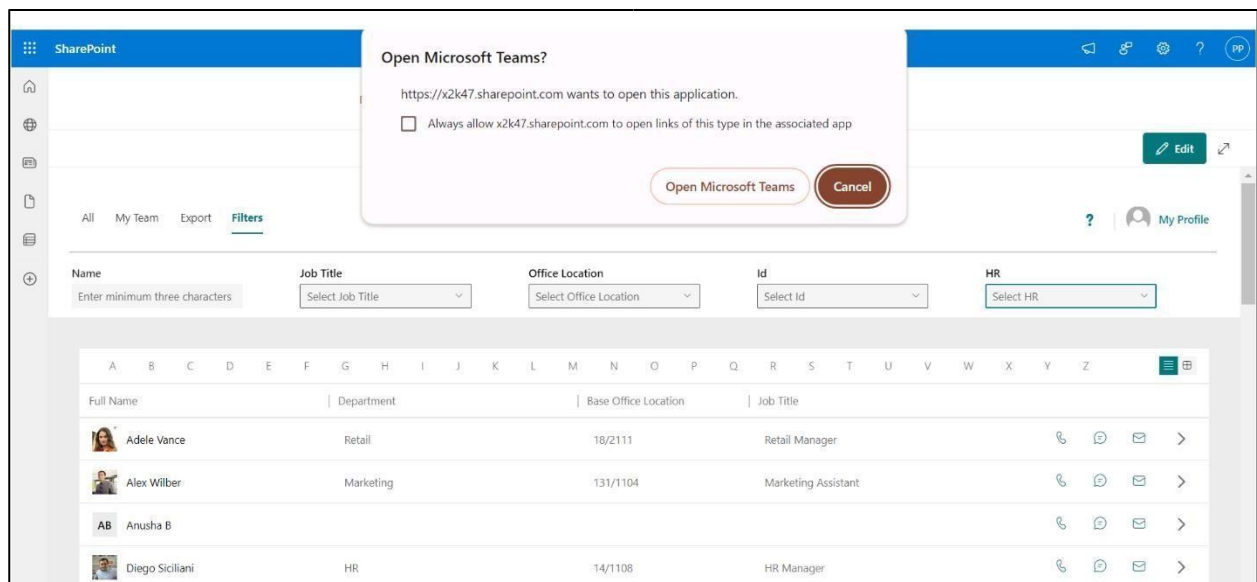
- **Calling an Employee:** Click the phone icon next to an employee's name to initiate a call.

Open Pick an app?
 https://x2k47.sharepoint.com wants to open this application.
☐ Always allow x2k47.sharepoint.com to open links of this type in the associated app
 Open Pick an app Cancel

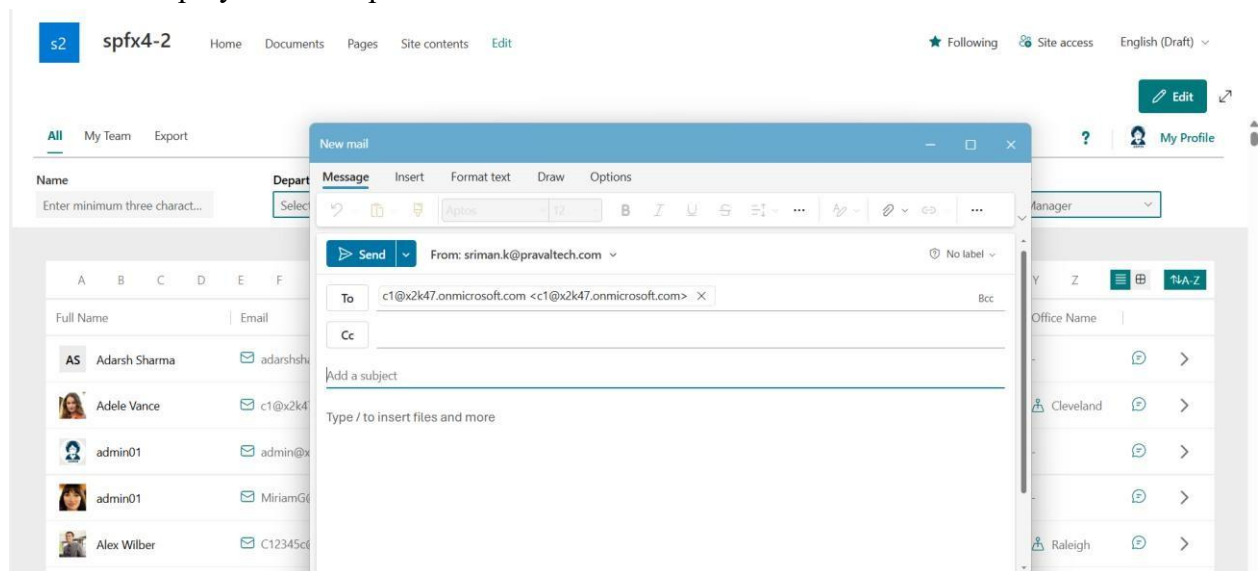
| Name | Department | Job Title | Office Location | Manager |
|--------------------------------|-------------------|------------------------------|------------------------|----------------|
| Enter minimum three charact... | Select Department | Enter minimum two characters | Select Office Location | Select Manager |

| Full Name | Email | Mobile Phone | Business Phone | Manager | Job Title | Office Name |
|------------------|------------------------------------|--------------|-----------------|-----------------|------------------|-------------|
| AS Adarsh Sharma | adarshsharma@x2k47.onmicrosoft.com | - | - | admin01 | - | - |
| Adele Vance | c1@x2k47.onmicrosoft.com | 9876543210 | +1 4234567890 | admin01 | Retail Manager j | Cleveland |
| admin01 | admin@x2k47.onmicrosoft.com | 3614834823 | 917569662969 | - | QA Engineer | - |
| admin01 | MiriamG@x2k47.onmicrosoft.com | - | +1 858 555 0109 | Patti Fernandez | QA Director | - |

- **Messaging an Employee:** Click the message icon to redirect to the employee's chat interface.



- **Emailing an Employee:** Click the email icon to open your default email application with the employee's email pre-filled.



Manage App Configurations

Manage App Configurations section consists of multiple tabs which deals with settings and customization of app nodes, information related with employees and so on. When you click Manage App Configurations Tab, Visual Customization section gets displayed by default

Visual Customization

Visual Customization in the Employee Directory allows users to personalize the appearance of the application to suit their preferences. This section covers how to configure Light/Dark Mode, customize Header Fields, utilize the Preview Section, and apply or close settings using the Apply/Close Button.

Accessing the Visual Customization tab

- Navigate to the App Configuration panel.
- Select the "Visual Customization" tab from the menu.

Light/Dark Mode

Choose between a light theme (default) and a dark theme for the Employee Directory application interface.

Steps to Configure:

1. Navigate to the Admin Panel within the Employee Directory.

The screenshot shows the 'Visual Customization' panel for the Saketa Employee Directory PRO. The panel has a dark sidebar on the left with the following menu items: 'Visual Customization' (selected), 'ED Filters', 'User Profile', and 'ED Groups'. The main content area is titled 'Visual Customization' and includes a 'Reset' button in the top right. Below the title are two toggle buttons: 'Light' (selected) and 'Dark'. There are two dropdown menus: 'Header' with 'Default' selected and 'Default view' with 'List' selected. A 'Preview' section shows a live preview of the application interface with a table of employees. The table has columns: Full Name, Email, Mobile Ph..., Business P..., Manager, Job Title, and Office Na... The preview table shows three rows of employee data. At the bottom of the panel are 'Close' and 'Apply' buttons.

| | Full Name | Email | Mobile Ph... | Business P... | Manager | Job Title | Office Na... |
|----|-----------|----------|--------------|---------------|---------|------------|--------------|
| AA | A. | AlexW@d | - | 4567890 | - | HR Manager | Hyderal |
| AA | A. | AllanD@d | - | 4567890 | - | IT Admin | Hyderal |
| DD | D. | DiegoS@c | - | 4567890 | - | HR Manager | Hyderal |

3. Find the Light/Dark Mode setting.

This is a close-up view of the 'Visual Customization' panel. It shows the title 'Visual Customization' and a 'Reset' button. Below the title are two toggle buttons: 'Light' (selected) and 'Dark'.

4. Select either the "Light" or "Dark" mode option based on your preference.

Header Fields Customization

Purpose:

Customize the appearance of specific elements within the Employee Directory interface, including node background color, node text color, and index text color.

Steps to Customize:

1. Access the Visual Customization tab in the Admin Panel.
2. Choose the "Custom" option under Header Fields to enable customization.
3. Adjust the following settings:
 - **Node Background Color:** Modify the background color of nodes displayed in the grid view.

The screenshot displays the 'Visual Customization' panel of the Saketa Employee Directory PRO. On the left is a dark sidebar with navigation links: 'Visual Customization' (active), 'ED Filters', 'User Profile', and 'ED Groups'. The main panel has a title 'Visual Customization' and a 'Reset' link. Below the title are two toggle buttons for 'Light' and 'Dark' modes. The settings are organized into two columns. The left column includes a 'Header' dropdown set to 'Custom', a 'Node background color' input field containing '#e30e0e', a color picker showing a red-to-black gradient, and an 'Index text color' input field containing '00000000'. The right column includes a 'Default view' dropdown set to 'List', a 'Node text color' input field containing '787878', and a 'Close' button. At the bottom right is a large teal 'Apply' button. The footer of the sidebar reads 'Powered by Saketa'.

Saketa Employee Directory PRO

Visual Customization

ED Filters

User Profile

ED Groups

Powered by Saketa

Visual Customization

Reset

Light Dark

Header

Custom

Default view

List

Node background color

#e30e0e

Node text color

787878

Index text color

00000000

Close

Apply

- **Node Text Color:** Change the color of text displayed within each node.

The screenshot shows the 'Visual Customization' interface for 'Saketa Employee Directory PRO'. On the left is a dark sidebar with navigation links: 'Visual Customization' (active), 'ED Filters', 'User Profile', and 'ED Groups'. The main content area has a title 'Visual Customization' and a 'Reset' link. Below the title are two tabs: 'Light' (selected) and 'Dark'. The interface is divided into two columns of settings. The left column includes: 'Header' (set to 'Custom'), 'Node background color' (set to '#e30e0e'), and 'Index text color' (set to '00000000'). The right column includes: 'Default view' (set to 'List') and 'Node text color' (set to '#0cf02a'). Below the 'Node text color' input is a color picker with a green-to-black gradient and a rainbow color bar. At the bottom of the main area is a 'Preview' section with an 'Expand' link. A footer bar contains 'Powered by Saketa' and 'Close' and 'Apply' buttons.

Saketa Employee Directory PRO

Visual Customization

Reset

Light Dark

Header: Custom

Node background color: #e30e0e

Index text color: 00000000

Default view: List


Node text color: #0cf02a

Preview Expand

Close Apply

Powered by Saketa

- **Index Text Color:** Customize the color of alphabetical index text used for filtering employees.


Saketa Employee Directory PRO

Visual Customization

ED Filters

User Profile

ED Groups

Powered by  Saketa

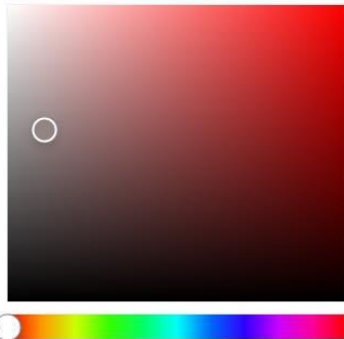
Visual Customization

LightDark

HeaderCustom

Node background color#e30e0e

Index text color#948484




Default viewList

Node text color#0cf02a

CloseApply

Default View

- **Purpose:** Define the default layout view for the Employee Directory interface. □ **Options:** List, Card
- **Steps to Set Default View:**
 1. Navigate to the Visual Customization tab in the Admin Panel.
 2. Locate the Default View section.
 3. Select either "List" or " Card" as the default layout view.
 4. Changes will apply to the initial display format upon accessing the Employee Directory interface.


 **Saketa Employee Directory PRO**

Visual Customization

ED Filters

User Profile

ED Groups

Powered by  Saketa

Visual Customization

Reset

LightDark

HeaderCustom

Node background color#e30e0e

Index text color#948484

Default viewListListCard

PreviewExpand

AllMy TeamExportFilters? | My Profile

ABCDEFGHIJKLMNOPQRSTUVWXYZ

Full NameEmailMobile Ph...Business P...ManagerJob TitleOffice Na...

AA A.. AlexW@d-4567890-HR ManagerHydral

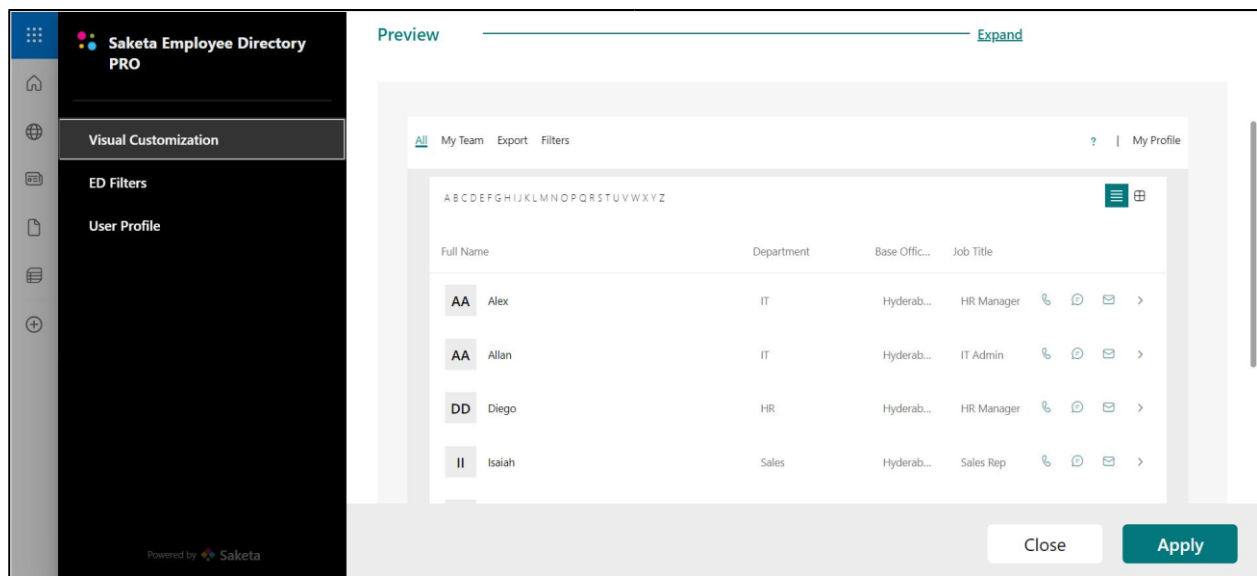
CloseApply

Preview Section

Provides a real-time preview of how visual customizations impact the Employee Directory application interface.

Steps to Preview Changes:

1. Make adjustments to Light/Dark Mode or Header Fields settings in the Visual Customization tab.
2. Observe the Preview Section located at the bottom or side of the Admin Panel.
3. Changes made to node colors, text colors, or theme will be immediately reflected in the preview.



Usage:

- **Real-Time Feedback:** Allows users to assess the visual impact of customizations before applying them.

Apply/Close Button

Purpose:

Finalize and apply configured visual settings to the Employee Directory interface or close the Admin Panel without applying changes.

Steps to Apply or Close:

1. After making desired adjustments in the Visual Customization tab.
2. Click on the "Apply" button to save and apply the changes to the application.
3. Click on the "Close" button to exit the Admin Panel without applying changes.

Usage:

- **Apply Button:** Commits all configured visual customizations to the Employee Directory.
- **Close Button:** Cancels any changes made since the last applied settings, ensuring no unintended modifications.

ED Filters Configuration

The ED Filters Configuration tab allows administrators to define and manage filtering criteria within the Employee Directory application. This section provides detailed instructions on how to configure filters to refine employee listings based on Active Directory (AD) attributes and other criteria.

Accessing the ED Filters tab

- Navigate to the App Configuration panel.
- Select the "ED Filters" tab from the menu.



Configuration Tab

1. Adding Filter Criteria



- **Dropdown Selection:** Start by selecting a Filter Criteria from the dropdown menu. Examples include Job Title, ID, Department, etc. These criteria are derived from employee profile information stored in Active Directory.

The screenshot displays the 'Edit Filter Fields' configuration window in the Saketa Employee Directory PRO application. On the left is a dark sidebar with navigation options: 'Visual Customization', 'ED Filters' (which is highlighted), 'User Profile', and 'ED Groups'. The main content area has a title 'Edit Filter Fields' and a 'Reset' button in the top right. Below the title are two tabs: 'Configuration' (active) and 'Filters'. A 'Field List' dropdown menu shows 'Department, JobTitle, Manager'. A red note box states: '*Note: Only 3 fields can be selected and office location is constant'. Below this, three filter criteria are listed: 'Department' (with a value of 'Department'), 'jobTitle' (with a value of 'Job Title'), and 'officeLocation' (with a value of 'Office Location'). Each criterion has edit and delete icons. At the bottom right are 'Close' and 'Apply' buttons. The footer of the sidebar says 'Powered by Saketa'.



- **Adding a Filter:** After Selecting from the dropdown, it will incorporate it into the filtering options of the employee directory.

jobTitle  



JobTitle

officeLocation  

Office Location

Id  

Id

Department  

HR

2. **Editing Filter Criteria**
 - **Customizing Filter Names:** If you wish to rename a filter criterion for clarity or alignment with your organization's terminology:

- Click on the "Edit" button next to the filter name.

Saketa Employee Directory PRO

Visual Customization

ED Filters

User Profile



ED Groups


Configuration Filters



Field List

Department, JobTitle, Manager



***Note:** Only 3 fields can be selected and office location is constant

Department  



Department 

jobTitle  


Job Title


officeLocation  

Office Location


Manager  

Manager

Close 

Powered by  Saketa

- Make the necessary changes in the provided field.


 **Saketa Employee Directory PRO**

Visual Customization

ED Filters

User Profile

ED Groups

Powered by  Saketa

Edit Filter Fields

Reset

Configuration Filters

Field List

JobTitle, Manager

***Note:** Only 3 fields can be selected and office location is constant

jobTitle

Job Title

officeLocation

Office Location

Manager

Manager

CloseApply

- Confirm the changes by clicking the "Check" symbol.
- Finally, click "Save" to update and store all modifications.

Saketa Employee Directory PRO

Visual Customization

ED Filters

User Profile

ED Groups

Powered by Saketa

ConfigurationFilters

Field List

JobTitle, Manager

*Note:Only 3 fields can be selected and office location is constant

jobTitleJob Title

officeLocationOffice Location

ManagerManager

CloseApply

Note: Note that you can select up to four filter criteria in the general filter section. If you attempt to add more than four, an error message will appear prompting you to remove an existing filter before adding a new one.


Filters Tab

The Filters tab within ED Filters provides options to include or exclude specific employee profiles based on AD attributes. Here are the sections available:

1. Exclude External Accounts

Purpose: This dropdown allows administrators to exclude accounts that are not part of the organization (often referred to as "live accounts").

- **Default State:** “No” by default. Selecting “Yes” from the dropdown will include non-organizational accounts in the directory listing.




Visual Customization

ED Filters

User Profile

ED Groups

Powered by  Saketa

Edit Filter Fields

Reset

ConfigurationFilters

Exclude External Accounts

No

Exclude Filter by AD Attribute

= ☐ is Empty | +

Include Filter by AD Attribute

= ☐ is Empty | +


Domain filter

Select Domain


CloseApply

2. Exclude Filter by AD Attribute

- Purpose:** Enables exclusion of employees based on specific AD attributes.
- Usage Example:** To exclude employees with "John" as their first name, type "Employee First Name" in the first box and "John" in the second box.


Saketa Employee Directory PRO

Visual Customization
ED Filters
User Profile
ED Groups

Powered by  Saketa

Edit Filter Fields

Reset

Configuration
Filters

Exclude External Accounts

No

Exclude Filter by AD Attribute

=

is Empty

+

| | | | |
|-------------------|------|---------|---|
| jobTitle | BSA | String | × |
| showInAddressList | true | Boolean | × |

Include Filter by AD Attribute

=

is Empty

+

Domain filter


pravaltech.com, gmail.com

Close


Apply

3. Include Filter by AD Attribute

- **Purpose:** Conversely, this section allows inclusion of employees based on specific AD attributes.
- **Usage Example:** To include employees with specific qualifications or roles, administrators can define conditions based on relevant AD attributes. When include filter is selected then only the included will be seen in the list of employees.


Saketa Employee Directory PRO

Visual Customization
ED Filters
User Profile
ED Groups

Powered by  Saketa

Edit Filter Fields

Reset

Configuration
Filters

Exclude External Accounts

No

Exclude Filter by AD Attribute

=
☐ is Empty
+

Include Filter by AD Attribute

=
☐ is Empty
+

jobTitle

BSA

String

×

Domain filter

pravaltech.com, gmail.com

Close

Apply

4. Domain Filter:

This dropdown displays all domains associated with your organization, including those of external users. You can select specific domains you wish to exclude.

Usage Example: To exclude employees with the "[@gmail.com](#)" domain, select it from the dropdown and click "Apply." Employees with that domain in their email addresses will be excluded from the list.

Purpose: Allows you to filter out employees based on specific email domains.

When this Domain Filter is selected, users belonging to the specified domain should be excluded from the results

Saketa Employee Directory PRO

Visual Customization

ED Filters

User Profile

ED Groups

Powered by Saketa

Edit Filter Fields

Reset

Configuration Filters

Exclude External Accounts

No

Exclude Filter by AD Attribute

= is Empty +

Include Filter by AD Attribute

= is Empty +

jobTitle BSA String X

Domain filter

pravaltech.com, gmail.com

Close Apply

Apply/Close Button

Purpose:

Finalize and apply configured visual settings to the Employee Directory interface or close the Admin Panel without applying changes.

Steps to Apply or Close:

4. After making desired adjustments in the “ED Filters” tab.
5. Click on the "Apply" button to save and apply the changes to the application.
6. Click on the "Close" button to exit the Admin Panel without applying changes.

Usage:

- **Apply Button:** Commits all configured “ED Filters” to the Employee Directory.
- **Close Button:** Cancels any changes made since the last applied settings, ensuring no unintended modifications.

User Profile Settings

In the Admin Panel, the User Profile tab allows customization of the information displayed in the side panel when viewing employee details.

Accessing the User Profile tab

- Navigate to the App Configuration panel.
- Select the "User Profile" tab from the menu.

Professional Details

Default Mode:

- By default, the following fields are selected:
 - Job Title
 - Department
 - Manager
 - Reportees
- Users can toggle these fields on/off based on their preferences. These fields will appear in the side panel when an employee is clicked for detailed information.

Saketa Employee Directory PRO

Edit User Profile [Reset](#)

Professional Details ☒ Default ☐ Custom

jobTitle : ☒


department : ☒

Manager : ☒

Reportees : ☒

Custom Mode:

- Selecting the Custom radio button allows users to choose additional fields to display.
- Additional fields available include:
 - Work Email
 - Mobile Number
 - Office
 - Skills
 - Experience
- Users can toggle these fields on/off as needed. Changes made here will reflect in the side panel when viewing employee details.

 **Saketa Employee Directory PRO**


Visual Customization

ED Filters

User Profile

User Profile

ED Groups

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Edit User Profile

Reset

Professional Details

☐ Default

☒ Custom

jobTitle :

department :

Manager :

Reportees :

Custom Fields

Mobile Number :

Office Address :

Office Code :

Office Name :

Work Email :

Branch Phone :


Close

Apply

Personal details

Default Mode:

- By default, the following field is disabled: ☐ About Me
- Users can toggle this field on/off based on their preferences. This field will appear in the side panel under Personal Information when viewing employee details.

 **Saketa Employee Directory PRO**


Visual Customization

ED Filters

User Profile

User Profile

ED Groups

Powered by  Saketa

Personal Details

☒ Default

☐ Custom

AboutMe :

Close

Apply

Custom Mode:

- Selecting the Custom radio button allows users to choose additional personal details to display.

- Additional fields available include:
 - Interests
 - Schools
- Users can toggle these fields on/off as needed. Changes made here will reflect in the side panel under Personal Information when viewing employee details.

The screenshot shows a 'User Profile' configuration window. On the left is a dark sidebar with 'User Profile' and 'ED Groups' tabs. The main content area is light gray. At the top, there's a header bar. Below it, the 'Personal Details' section has two radio buttons: 'Default' (unselected) and 'Custom' (selected). Underneath is an 'AboutMe' label followed by a dotted line and a toggle switch. The 'Custom Fields' section features a dropdown menu with the text 'Select from the dropdown' and a plus icon. The dropdown is open, showing 'Interests' and 'Schools'. At the bottom right, there are two buttons: 'Close' (white with gray border) and 'Apply' (teal with white text). The bottom left corner of the sidebar says 'Powered by Saketa'.

Apply/Close Button

Purpose:

Finalize and apply configured visual settings to the Employee Directory interface or close the Admin Panel without applying changes.

Steps to Apply or Close:

7. After making desired adjustments in the “User Profile” tab.
8. Click on the "Apply" button to save and apply the changes to the application.
9. Click on the "Close" button to exit the Admin Panel without applying changes.

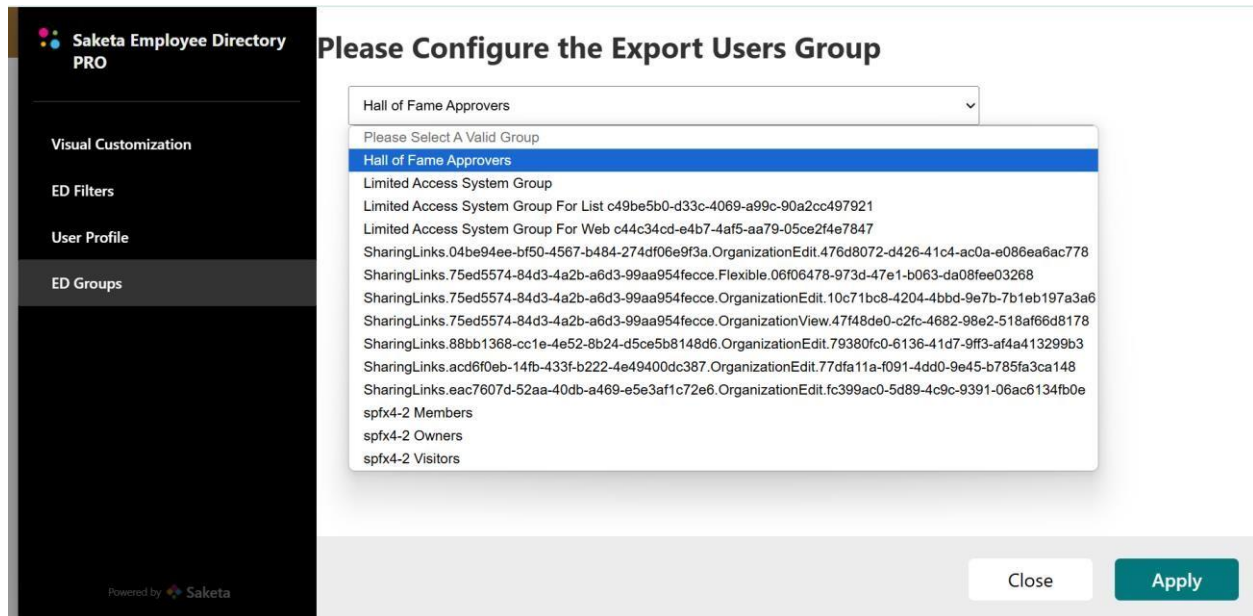
Usage:

- **Apply Button:** Commits all configured “User Profile” changes to the Employee Directory.
- **Close Button:** Cancels any changes made since the last applied settings, ensuring no unintended modifications.

ED Group:

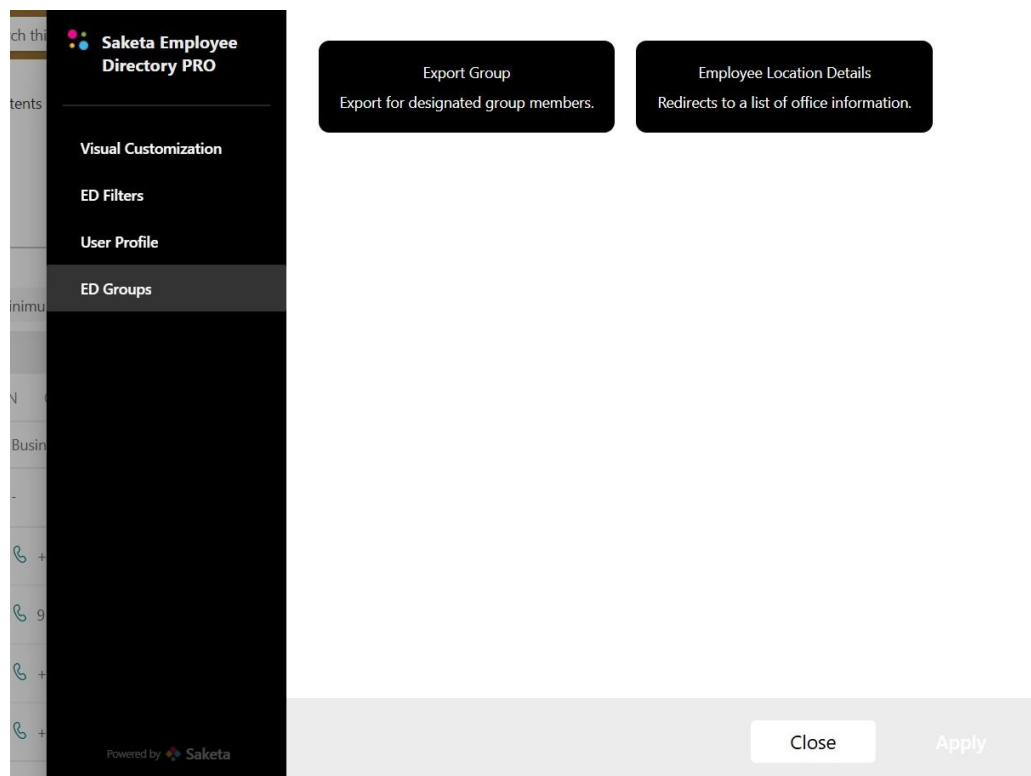
When no group is selected, users should be able to view all the groups available in the SharePoint site.

Once a specific group is selected, only the members of that group should be able to see and access the "Export" tab. Only these group members will have permission to export the data.



Additionally, users with Full Control permissions on the site, including the Site Owner, should always have access to the "Export" tab, regardless of the group selection.

When the group is selected then you can see like this.



Clicking on the "Export Group" will navigate the user to that specific group.

"Employee Location Details" is a custom SharePoint list that contains location information. Clicking on it will take the user to that list.

When the Reset button is clicked in the field filters, the ED Group selection will also be reset, and the owner will need to select the group again.