USER GUIDE

Employee Directory

Contents

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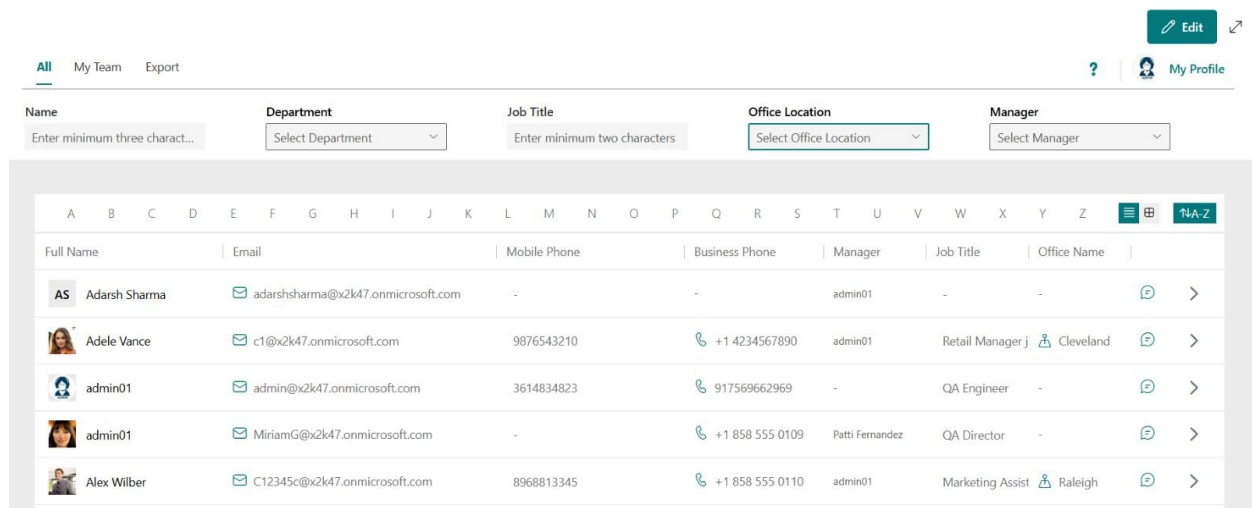
The Employee Directory web part includes a navigation bar at the top, offering various options to help users efficiently navigate and interact with employee information.

All

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

My Team

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

Export

- o **Purpose:** Enables users to export organizational data into PDF or Excel format for offline use or sharing. o **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.

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.

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.

Deleting Columns

Remove Unnecessary Columns:

- **Purpose:** Customize export files by deleting columns that are not required for the intended use.
- **Usage:** Enhances the relevance and efficiency of exported data by eliminating extraneous information.

Filters in All Tab

Purpose: Facilitates quick and targeted searches for employees based on specific criteria such as name, job title, office location, ID, and department.

- **Name:** Text field where entering an employee's name filters the list accordingly.

- **Job Title:** Dropdown menu for selecting and filtering employees by their job titles.

? | 👤 My Profile

| Name	Department	Job Title	Office Location	Manager
Enter minimum three charact...	Select Department	manager	Select Office Location	Select 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 | ☰ ⊞ | ↑A-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
Enter minimum three charact...	Select Department	Enter minimum two characters	Cleveland, Raleigh	Select Manager

Office Location : Cleveland ✕   Raleigh ✕   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 | ☰ ⊞ | ↑A-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
Enter minimum three charact...	Select Department	Enter minimum two characters	Select Office Location	Adarsh Sharma, Lee Gu, Li...

Manager : Adarsh Sharma ✕   Lee Gu ✕   admin01 ✕   Lidia Holloway ✕   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 | ☰ ⊞ | ↑A-Z |

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	💬	›
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.

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

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.

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.

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.
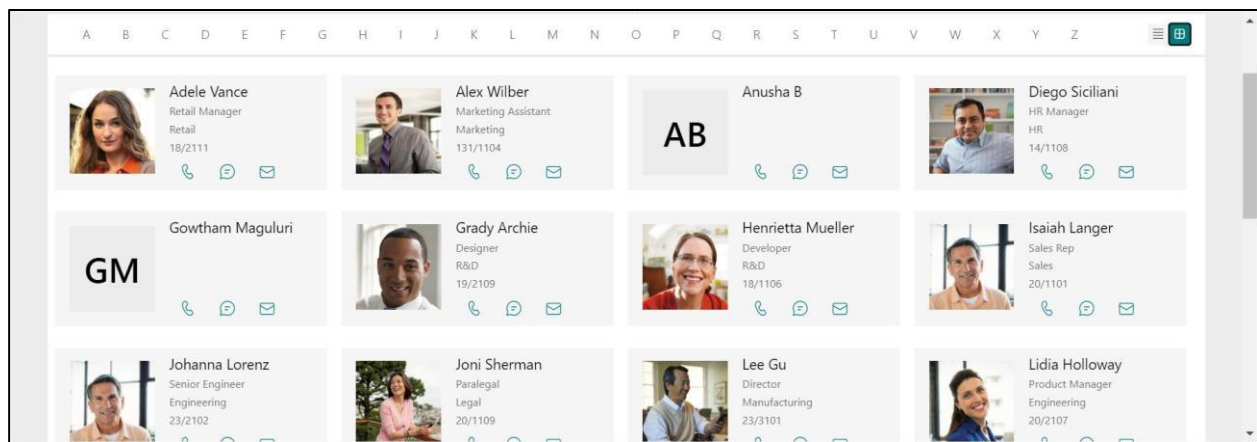

- **Grid/Card View:** Presents employees in a card-like format, where each card includes the employee's photo, name, department, base office location, job title, and icons for calling, messaging, and emailing. This view also supports visual customizations such as node background color and text color.

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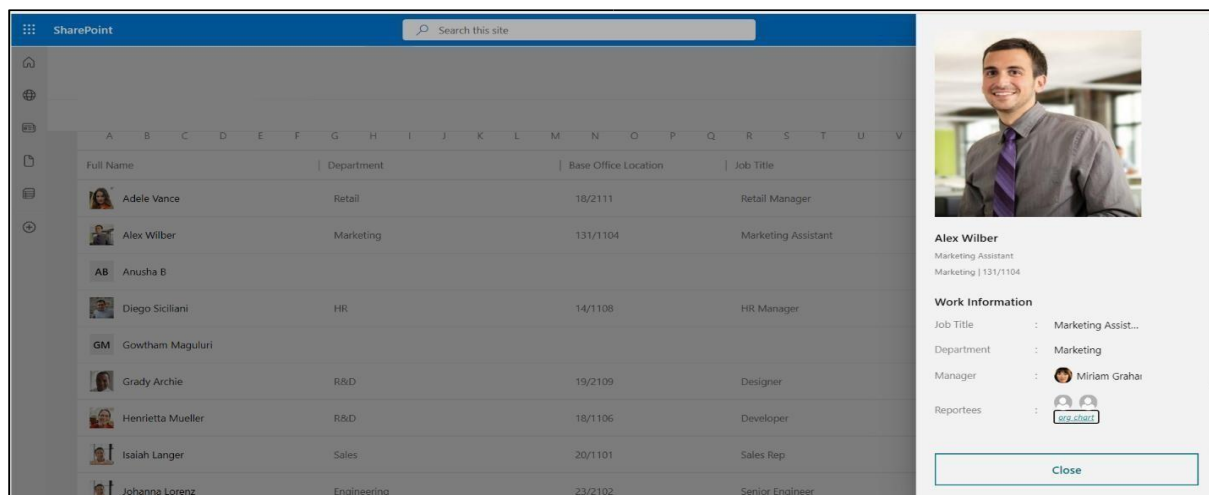
- **Personal Information:**
  - About Me
  - Interests
  - School

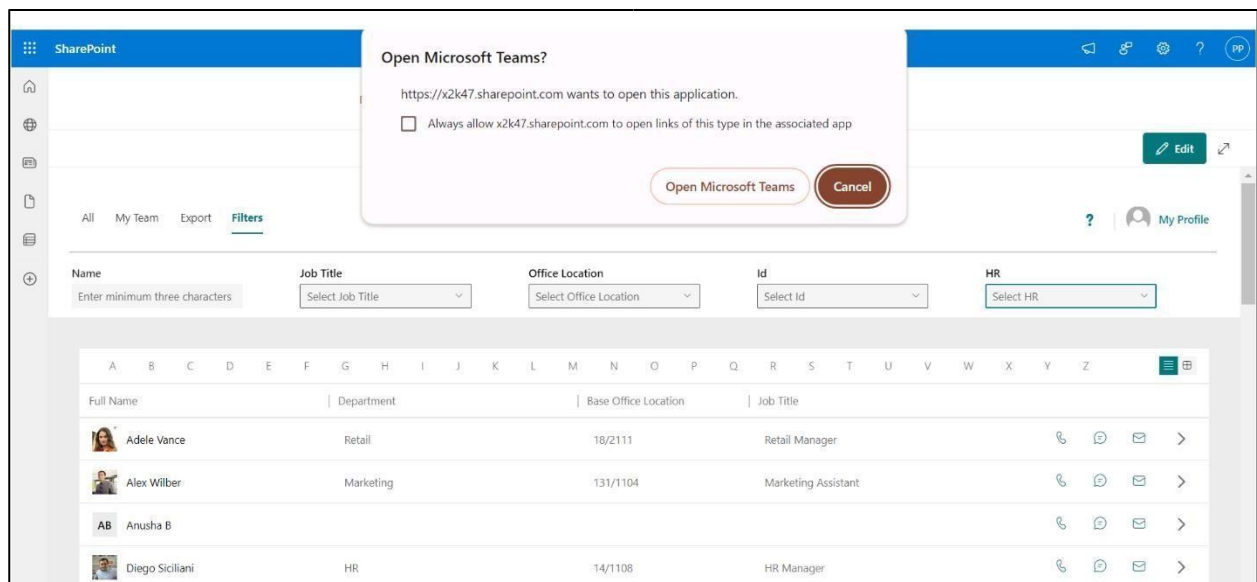## Using the Application

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

- **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.
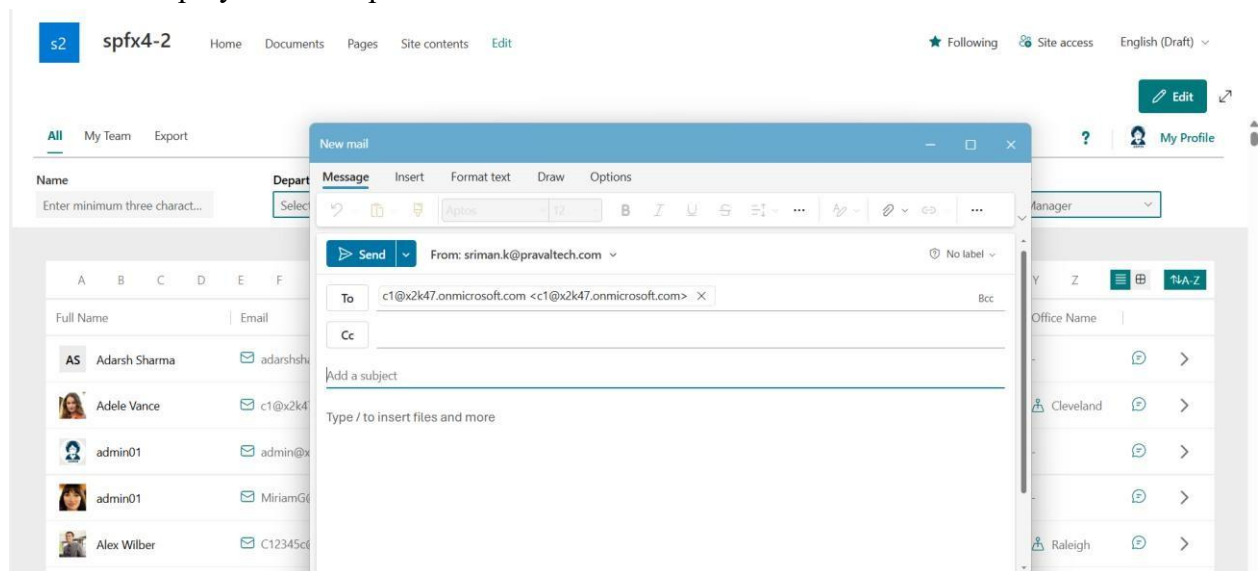
Manage App Configurations

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.

- 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.

3. Find the Light/Dark Mode setting.

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:
   o **Node Background Color:** Modify the background color of nodes displayed in the grid view.

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

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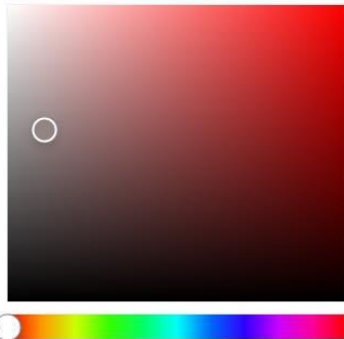
Default View

- **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.

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.
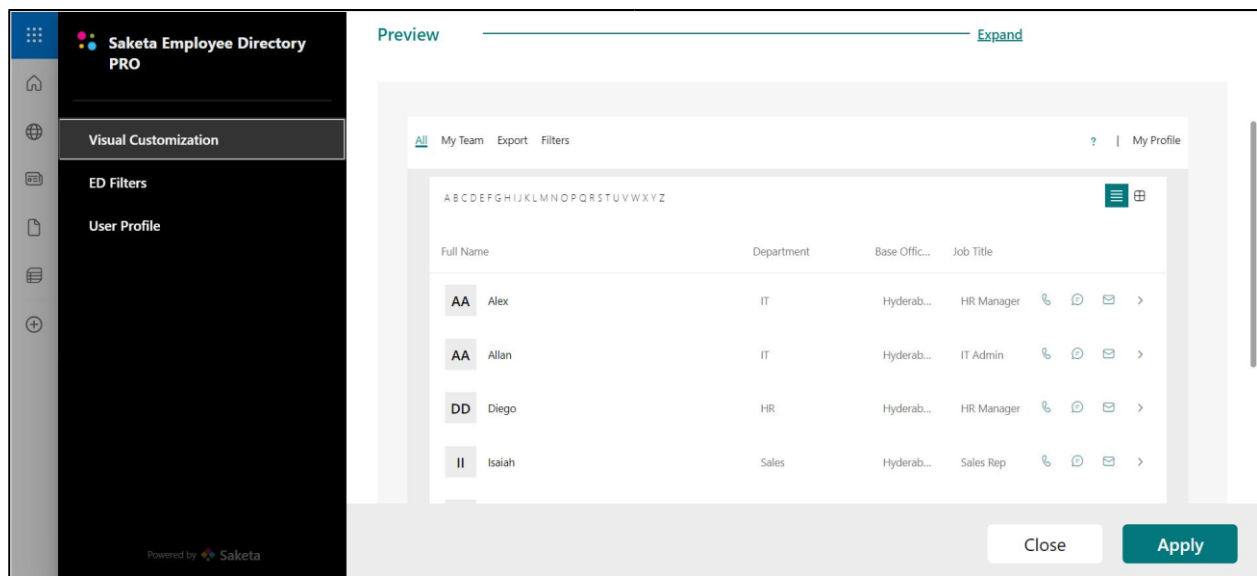
Usage:

> ☐ **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**
   o **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.

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

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.

- Make the necessary changes in the provided field.

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

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.

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.

3. **Include Filter by AD Attribute**

   o **Purpose:** Conversely, this section allows inclusion of employees based on specific AD attributes.

   o **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.

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

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.

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.

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.

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.


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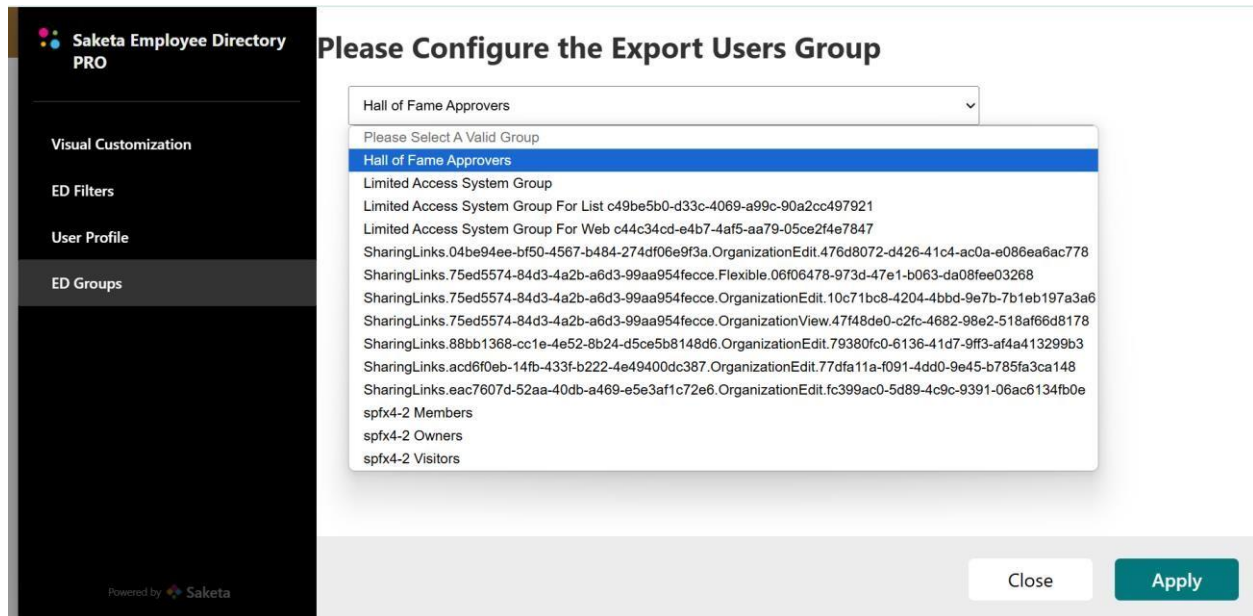
Additionally, users with Full Control permissions on the site, including the Site Owner, should always have access to the "Export" tab, regardless of the group selection.

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

Saketa Employee Directory PRO

Visual Customization

ED Filters

User Profile

ED Groups

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Powered by ● Saketa

Export Group
Export for designated group members.

Employee Location Details
Redirects to a list of office information.

Close   Apply
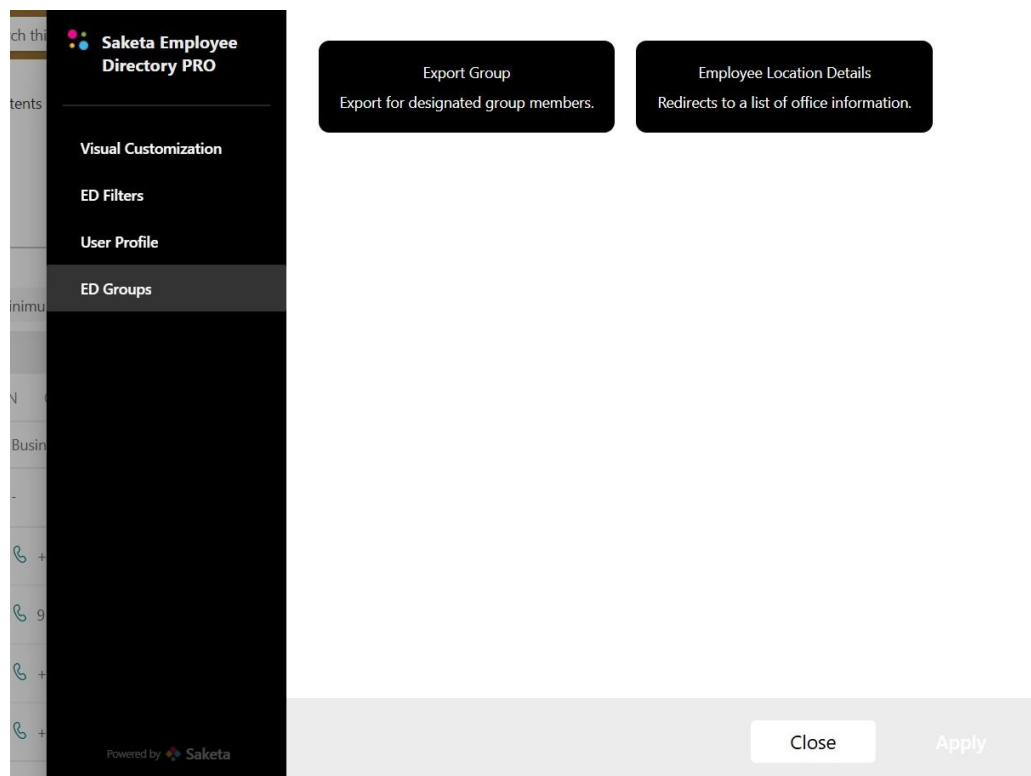
Clicking on the "Export Group" will navigate the user to that specific group.
"Employee Location Details" is a custom SharePoint list that contains location information. Clicking on it will take the user to that list.

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.