



HarePoint Business Cards

For SharePoint Server 2010, SharePoint Foundation 2010, Microsoft Office SharePoint Server 2007 and Microsoft Windows SharePoint Services 3.0.



Product version 0.3
January 26, 2012

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Table of Contents

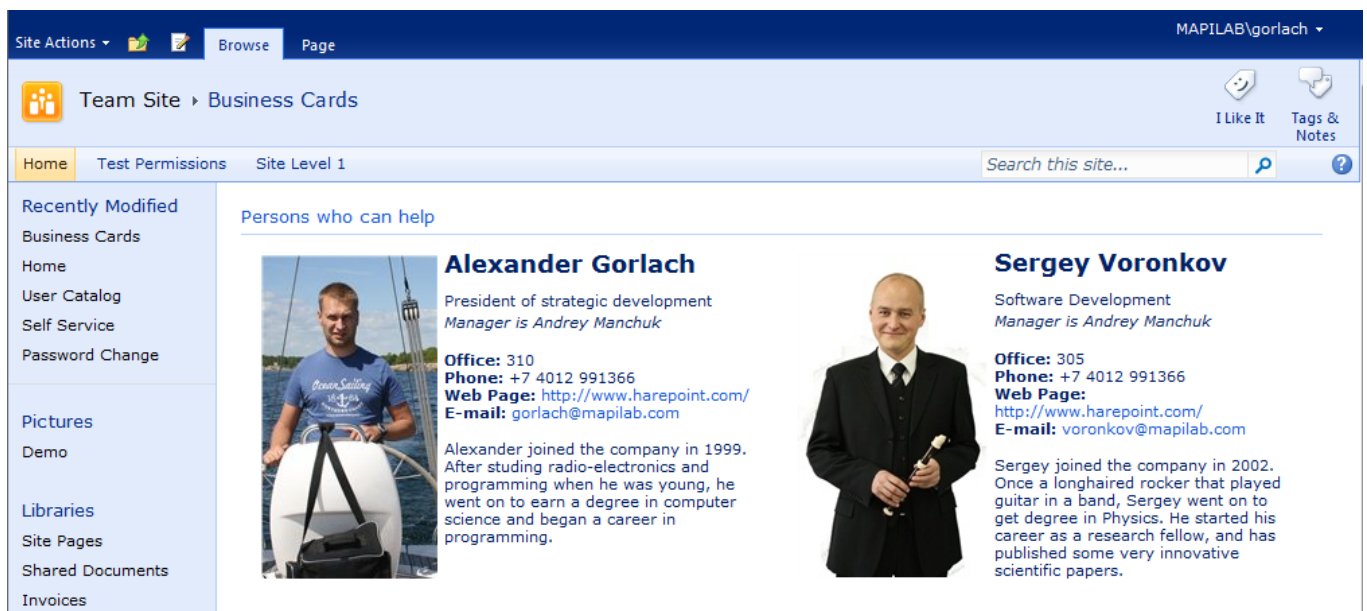
- Table of Contents 3
- I. Introduction 4
- II. Deployment..... 7
 - 1. System requirements..... 7
 - 2. Licensing and trial limitations 7
 - 3. Installing HarePoint Business Cards 8
 - 4. How to repair, upgrade or remove the Product 11
- III. Product Overview 12
 - 1. Getting started 12
 - 2. Product settings 14
 - 3. Creation of the card template..... 18
 - 4. Adding web-part and configuring appearance 20
- Appendix A. Troubleshooting 22

I. Introduction

This Product is designed for to publish users' contacts (cards) on site pages with automatic support of data relevance.

1. Place the web-part of the Product on the site page.
2. Specify a list of users or groups whose cards will be displayed by the web-part.
3. Determine the appearance and the set of published fields.

After that you can forget about this page. When adding a new user to the selected group a card with his contacts will automatically appear on the page. If you change user's information in the profile of SharePoint or Active Directory, the user's information on the page will be updated automatically too.



The screenshot displays a SharePoint interface for a 'Team Site' titled 'Business Cards'. The top navigation bar includes 'Site Actions', 'Browse', and 'Page'. The main content area is titled 'Persons who can help' and features two user cards. The left card is for Alexander Gorlach, President of strategic development, with contact information: Office: 310, Phone: +7 4012 991366, Web Page: http://www.harepoint.com/, and E-mail: gorlach@mapilab.com. The right card is for Sergey Voronkov, Software Development, with contact information: Office: 305, Phone: +7 4012 991366, Web Page: http://www.harepoint.com/, and E-mail: voronkov@mapilab.com. A left sidebar contains navigation links such as 'Home', 'User Catalog', and 'Password Change'.

To determine the appearance of cards you can use predefined templates, or create a card with a simple visual editor. In both cases, you can switch to editing the HTML code to maximize flexibility. For example, to animate cards with JavaScript or design card items with corporate site styles.

The appearance of cards and the set of fields can be defined at the level of a web-part, at the site level and the level of a site collection, and supports inheritance. Thus, by placing the web-part on the page, you can specify the settings so that the appearance of cards and the set of fields will be inherited from the site settings. Using inheritance you will have to make a change only at one place to change the appearance and the set of data in the users' cards of the whole site or site collection.

Product features:

- Publication of the users' cards, group members of SharePoint and Active Directory
- The function of inheriting the settings of card appearance
- Flexible delegation of rights for publishing contact information on the site or site collection

Card features:

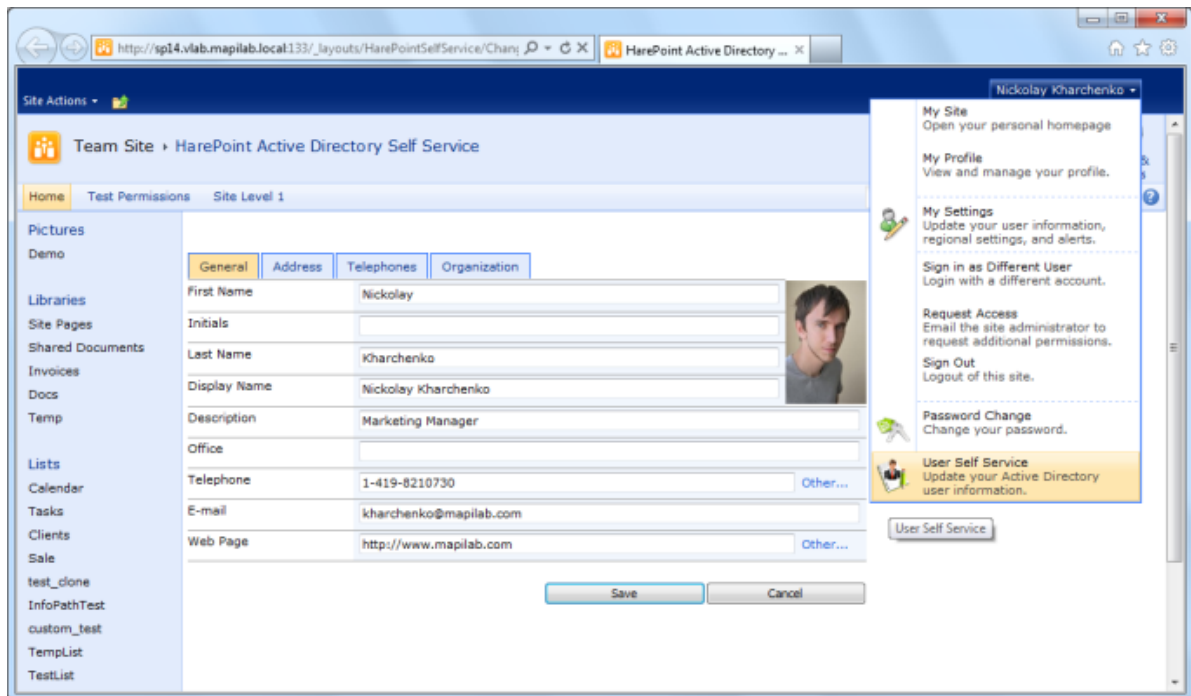
- Maximum flexibility in design by editing the HTML code
- The function of using fields from the profile of SharePoint and Active Directory
- The possibility of using simple logic (IF there is no photo in the profile, THEN use photo from Active Directory)
- Displaying the online status

Product benefits:

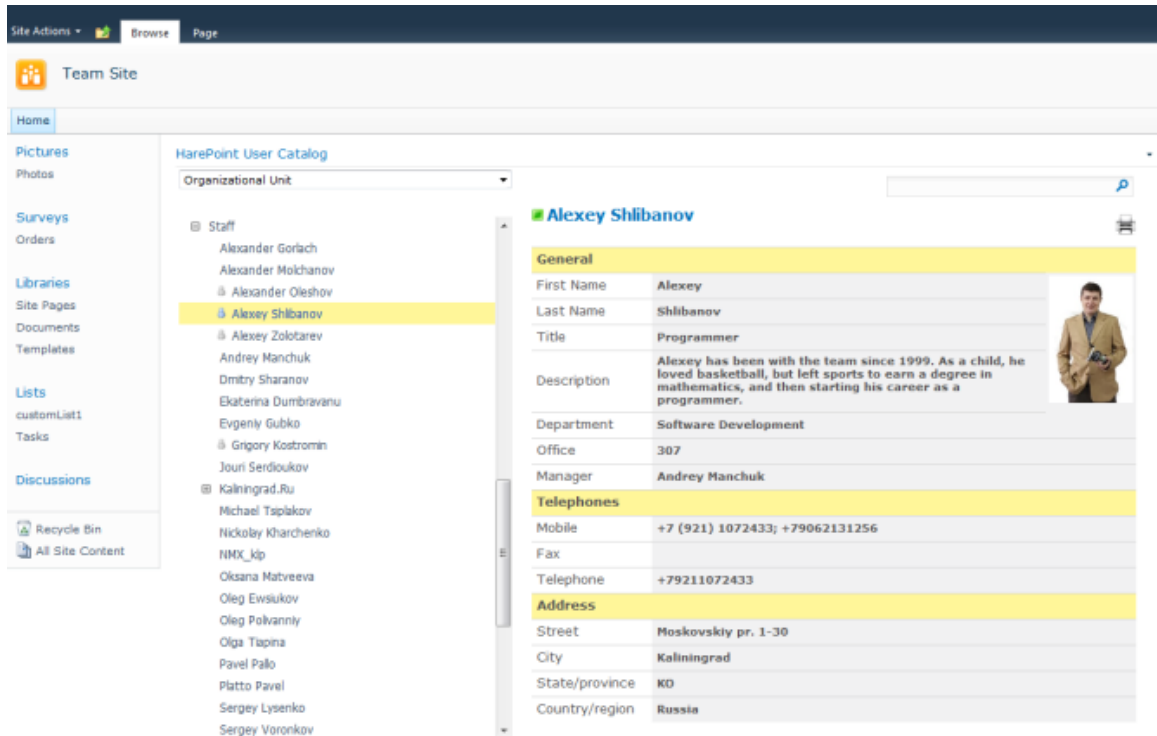
- Reduced expenses for maintaining the data relevance on the site
- Reduced expenses for changing the site design
- The possibility of creating uniform styles and templates for publishing data on the site or site collection

We also want to pay your attention to the following HarePoint products, which can be used together with this product:

- **HarePoint Active Directory Self Service** is a web part for SharePoint 2007/2010 which allows users to manage and update their Active Directory profile. With this product you'll always have up-to-date directory information with practically no cost.



- **HarePoint User Catalog** web part provides an easy to use way to display, navigate and search user information. The user list is presented in a tree view that can be arranged by Organizational Unit, by SharePoint site group or alphabetically. The interactive search feature allows users easily to find specified people and contact information.



You will find the information on these products, as well as trial versions at www.harepoint.com.

II. Deployment

1. System requirements

HarePoint Business Cards is designed to operate in:

- Microsoft SharePoint Server 2010,
- SharePoint Foundation 2010,
- Microsoft Office SharePoint Server 2007,
- Microsoft Windows SharePoint Services 3.0

(hereinafter referred to as SharePoint) environments.

The Product has no special requirements to operating system and its components, RAM memory space and CPU type. The Product may operate at any configurations where SharePoint is deployed; it requires 10 Mb of disk space on each SharePoint server.

2. Licensing and trial limitations

HarePoint Business Cards is licensed for a number of SharePoint Web Front-End Servers or where “Microsoft SharePoint Web Application” service is running. The number of licenses should correspond to a number of servers. A list of services installed on the server can be viewed by opening System Settings tab and clicking the link “Manage servers in this farm” on Central Administration site.

You may use the Product on the basis of one of two licenses:

1. **Trial License.** Provided automatically for a 30-day period to use the Product in organization’s environment without any limitations of Product functionality.
2. **Commercial License.** This license is purchased for a number of SharePoint Servers and allows using the Product in the organization’s environment without limitation by usage time and functionality.

Note that after purchasing of Commercial License and entering registration keys at the product settings product becomes fully functional.

See product page at <http://www.harepoint.com/> for more details about Product licensing.

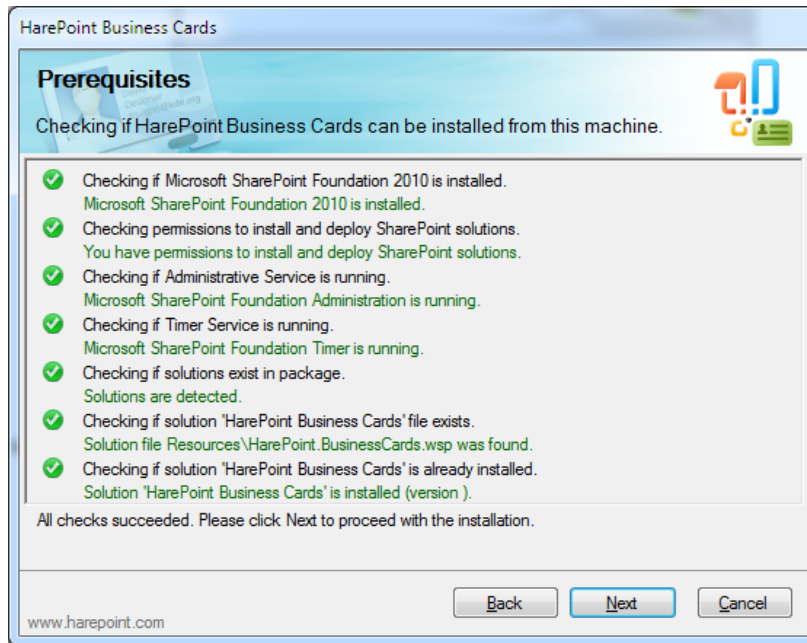
3. Installing HarePoint Business Cards

To install the product you'll need Farm Administrator rights.

Please access any WFE server of the SharePoint farm, unpack the product archive into a folder on the local disk and run the Installation Wizard (**SETUP.EXE**). Note, that Installation Wizard automatically detects version of your SharePoint environment (2007 or 2010) and starts the installation of corresponding solution package:

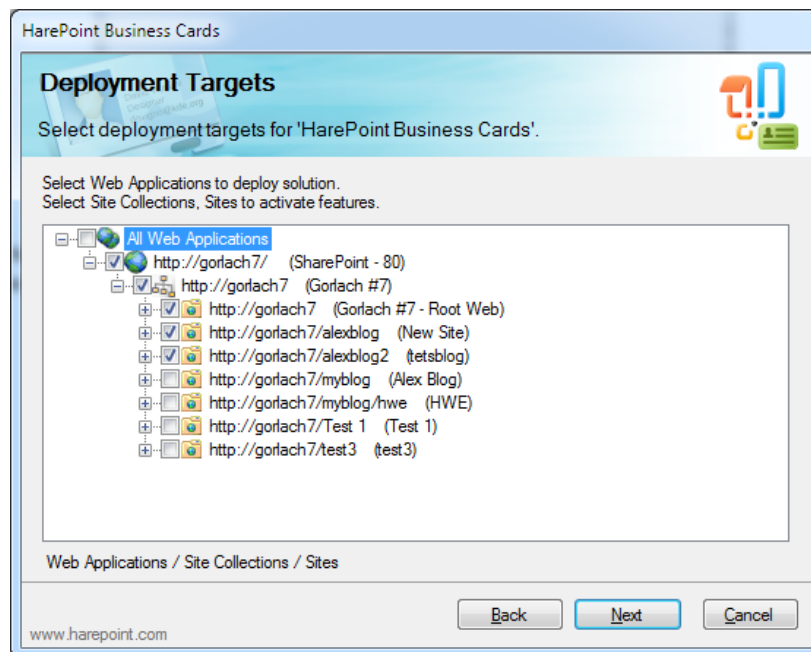


Press Next button on the wizard's welcome screen and the wizard will check if the product can be installed:

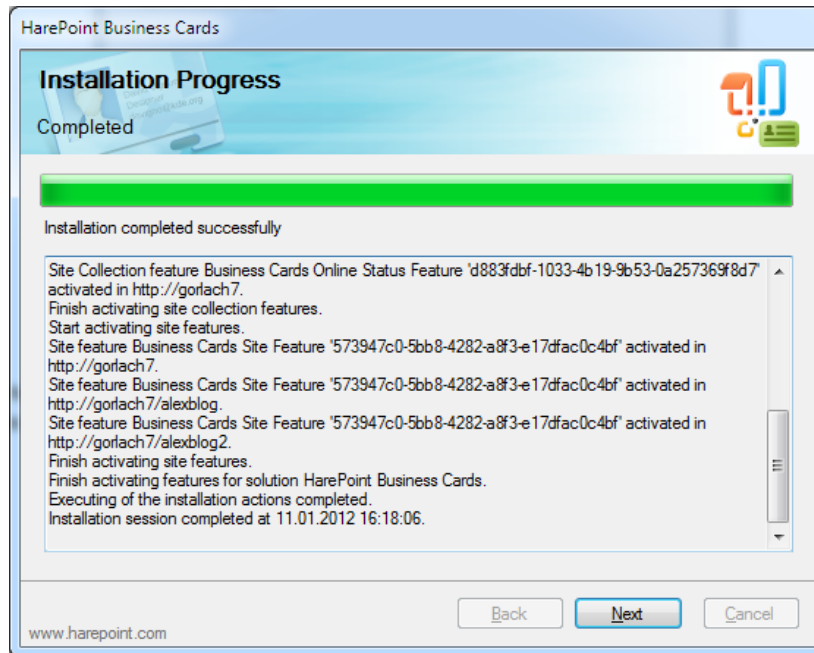


Should any problems be detected, please rectify them and restart the installation wizard.

At the next step of the Wizard, you'll choose sites and site collections where the Product should be deployed:



Select required sites and site collections and follow the instructions of the Wizard to complete installation:



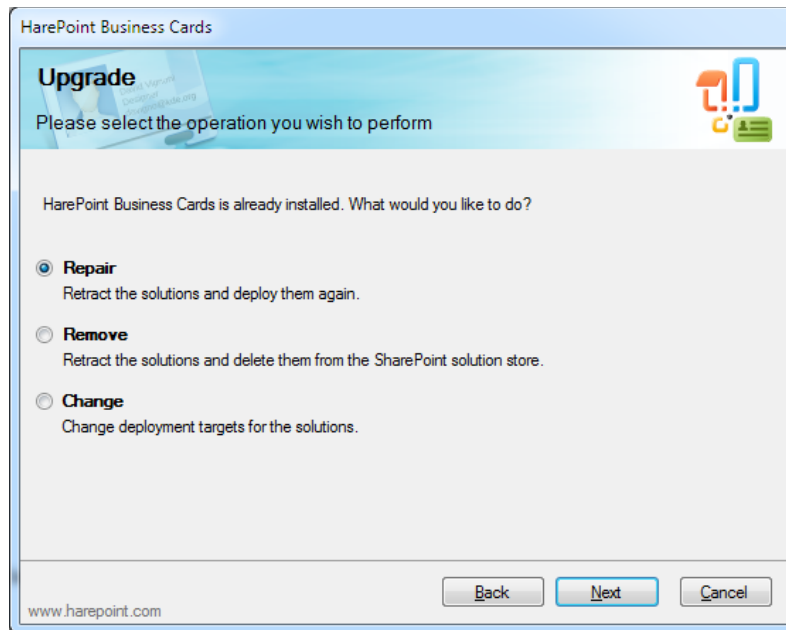
See the Section III of this manual for the Product settings overview.

4. How to repair, upgrade or remove the Product

To repair, upgrade or remove the product you'll need Farm Administrator rights.

Please enter any WFE server of the SharePoint farm, unpack the product archive into a folder on the local disk and run the Installation Wizard (**SETUP.EXE**). Note, that Installation Wizard automatically detects version of your SharePoint environment (2007 or 2010) and starts the deployment of corresponding solution package.

Following instructions of the Wizard, pass system check step similar to those during the product installation (see chapter 3). Upon completing these steps the Wizard will ask to repair, upgrade or remove the product components.



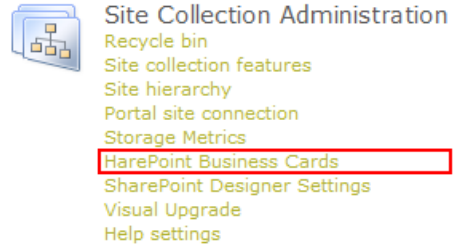
Select the required type of operation and follow the further instructions of the Wizard.

III. Product Overview

1. Getting started

This product consists of three parts:

- Administration page at site collection settings;
- Administration page at site settings;
- Web-part that display user cards.

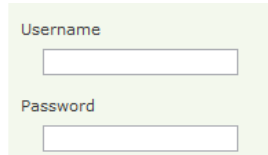


After installing the product you may need to apply a single setting before starting the work.

In the section Site Collection Administration follow the link HarePoint Business Cards and in the dialog box specify an account that has read user account information rights from Active Directory, because users' cards displayed by the Product can use both fields from the user's profile on the site of SharePoint, and from Active Directory:

Active Directory Access Credentials

Credentials of AD user with permissions to read user account information from Active Directory.

A form with two input fields. The first field is labeled 'Username' and the second is labeled 'Password'. Both fields are empty.

After that, the Product is ready to use and anyone who has Design permissions can add HarePoint Business Cards web part to the site pages (see chapter 4 of this Section for details).

All work with the product is reduced to its configuration, which includes:

1. Global product settings performed by the administrator at the level of site collection (account for reading Active Directory; editing a set of fields, available for use in cards; licensing settings).
2. Setting the list of users for displaying, displayed fields and the appearance of the cards (the list of users and/or groups; card template). These settings can be specified individually at the level of each web-part, and also inherited from the settings at the site level or the level of a site collection.
3. Standard settings of the location and displaying of a web-part. This group of settings is individual for each web-part and can be changed on a page with the web-part.

The idea of setting inheritance can be easily explained by an example: various pages of the site can contain dozens of web-parts displaying different groups of users. But all of these web-parts can use the same card template, inherited from the settings made at the site level. In this case, when changing the site design, the appearance of the cards can be brought into the compliance by changing a single setting at the site level.

All product settings can be presented in the table:

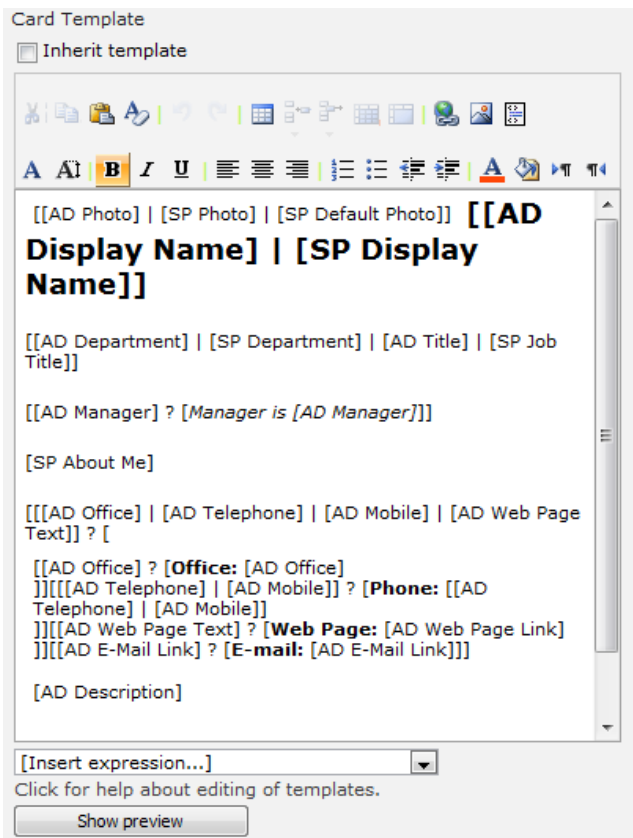
Group of settings	Administration page at site collection settings	Administration page at site settings	Web-part settings (individual for each instance)
<i>Global Settings</i>			
Account for Active Directory access	◆	◇	◇
Editable set of Active Directory and SharePoint profile fields for cards	◆	◇	◇
License key (registration number)	◆	◇	◇
<i>List of users and card type</i>			
List of users and groups to display	◆	◆	◆
Cards layout settings	◆	◆	◆
Card template	◆	◆	◆
<i>Standard web-part settings</i>			
Web-part appearance settings	◇	◇	◆
Web-part layout settings	◇	◇	◆
Advanced web-part settings	◇	◇	◆

◆ – Setting is available. ◇ – Setting is not available. ◆ - Setting is available and may be inherited.

More details about the configuration of the product are given in the next section of this guide.

The most difficult thing in the use of the Product may be creating of a card template. In simple cases, you can easily do it with the help of the built-in visual editor, which supports the insertion of fields from the user's profile and Active Directory, change of colors, font, etc.

But if your site has a complex design or if you want to create a real masterpiece, you may need to know HTML, to use, for example, company styles for site design.



2. Product settings

Product settings can be specified at the level of a site collection, site level and at the level of web-parts (see the previous chapter). This chapter lists all the settings of the Product, except the default settings for web-parts described in the manual for SharePoint. In the description of every setting the level at which it is available is specified.

- To edit the Product settings at the level of a site collection, go to Site Collection Administration and open the "HarePoint Business Cards" link.
- To edit the Product settings at the site level, go to Site Settings and open the "HarePoint Business Cards" link.
- To edit the product settings at the level of a web-part, click on the icon in its header and select "Edit Web-part" from the dropdown menu. In the new editing area go to section "Business Cards".

Also note that some of the settings support inheritance. When configuring such settings, you can either enter parameters or put the mark for values to be inherited. Detailed information on this mechanism is given in the previous chapter.

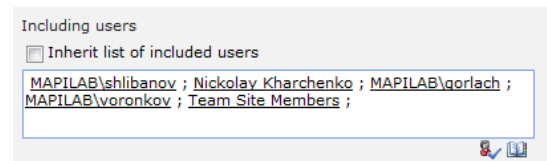
Please note that no settings, including the product license key, have the scope wider than a site collection. So, if you install the Product on two or more site collections, you have to configure the settings (for example, enter the license keys) individually for each site collection.

Active Directory Access Credentials. Available at: [Site Collection](#) level.

Specify an account that has read user account information right from Active Directory. It will be used by all web-parts for displaying attributes from Active Directory in the cards.

Including Users. Available at: [Site Collection](#), [Site Administration](#), [Web-Part](#) levels (inheritable).

The list of users of SharePoint, Active Directory, SharePoint groups and Active Directory organizational units. Cards of those users and members of these groups will be displayed. Please note that the product do not display cards of disabled and blocked users.



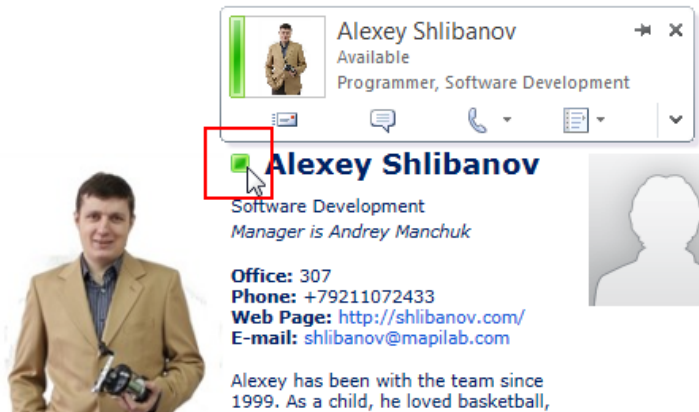
Excluding Users. Available at: [Site Collection](#), [Site Administration](#), [Web-Part](#) levels (inheritable).

The list of users of SharePoint, Active Directory, SharePoint groups and Active Directory organizational units. Users in this list will not be displayed, even if they are present at list "Including Users".

Sort Options. Available at: Site Collection, Site Administration, Web-Part levels (inheritable).

In this setting, the field by which users' cards will be sorted when displayed and the sort direction are specified.

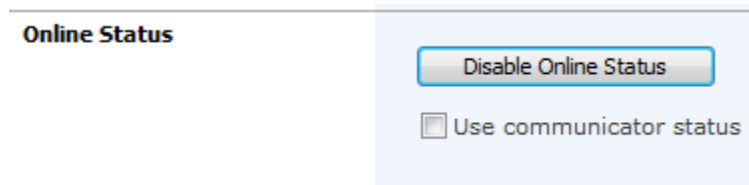
Online Status. Available at: Site Collection, Site Administration, Web-Part levels (inheritable).



A user's online status is displayed as a rectangle inserted into the card template by macro [SP Online Status] (see details in the next chapter).

To use the online status, feature "HarePoint Business Cards Online Status" on the site collection should be active. Enabling this feature is available either with section Site Collection Administration \ Features, and with

button "Disable Online Status" in the section of product settings at the level of a site collection:



This feature is a software module that monitors and stores the moment of the last users' visit of the site.

Setting "Use communicator status" allows you to get additional information about the status of the Office Communication Server 2007 and Lync 2010 user. This allows to display not only the Online and Offline statuses, but also such statuses as Busy and Do Not Disturb. In addition, using this setting results in displaying a pop-up menu for immediate communication with the user (shown in the figure above). For users who don't have installed Office Communicator, the pop-up menu will not be shown.

Card Template. Available at: Site Collection, Site Administration, Web-Part levels (inheritable).

A card template defines a set of the displayed fields and the appearance of the card. When editing, you can use predefined templates from the list or create your own template in the visual editor, which supports the function of inserting macros that are replaced by the corresponding fields from the user's profile on the site or in Active Directory when the card is displayed. When editing a template, you can also switch to HTML mode, offering maximum flexibility in determining the appearance of the template. Details about creating a card template are in the next chapter of this section.

Border Options. Available at: [Site Collection](#), [Site Administration](#), [Web-Part](#) levels (inheritable).

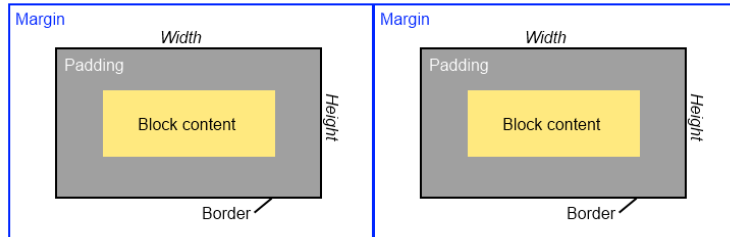
The width (in pixels), style and color of the card border. Select style "None" or set the width value to 0 to make the frame around the card not displayed.

Inheritance of these settings is turned on with the inheritance of card template settings.

Size Options. Available at: [Site Collection](#), [Site Administration](#), [Web-Part](#) levels (inheritable).

The card size (width and height), margin and padding, maximum photo size, in pixels. If photo sizes are larger than those specified in the settings, they will be automatically scaled while maintaining the proportions to fit the specified maximum limits. If the picture is less than both of these limits, it will not be enlarged. The concept of margin and padding is illustrated in the following figure:

Card margin:	<input type="text" value="5"/>
Card padding:	<input type="text" value="5"/>
Card width:	<input type="text" value="300"/>
Card height:	<input type="text" value="300"/>
Maximum photo width:	<input type="text" value="96"/>
Maximum photo height:	<input type="text" value="96"/>



The inheritance of these settings is turned on with the inheritance of the card template settings.

Properties. Available at: [Site Collection](#) level.

These settings determine the list of available macros that are replaced by the fields from the user profile on SharePoint site or in Active Directory, available when editing cards. The interface of list editing is a standard interface to edit the list of SharePoint. With its help you can delete, add and rename the fields.

HarePoint Business Cards Properties List	
Items	List
<input type="checkbox"/> Display Name	Internal Name
AD Country/Region	AD:co(String)
AD Company	AD:company(String)
AD Department	AD:department(String)
AD Description	AD:description(String)
AD Display Name	AD:displayName(String)
AD Fax	AD:facsimileTelephoneNumber(String)
AD First Name	AD:givenName(String)
AD Home	AD:homePhone(String)
AD Notes	AD:info(String)
AD Initials	AD:initials(String)
AD IP Phone	AD:ipPhone(String)
AD City	AD:l(String)
AD E-Mail Link	AD:mail(Email)
AD E-Mail Text	AD:mail(String)
AD Manager	AD:manager(DN)

Licenses. Available at: Site Collection level.

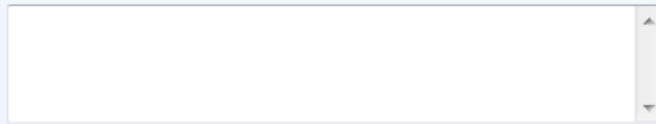
If you have product license, please enter the license code in “**Licenses**” section. This section also describes the type of your current license and in case of Trial License, the number of days left to its expiration:

Licenses

Specify license keys for each SharePoint server where HarePoint Business Cards is installed.

Trial mode: 29 days left.

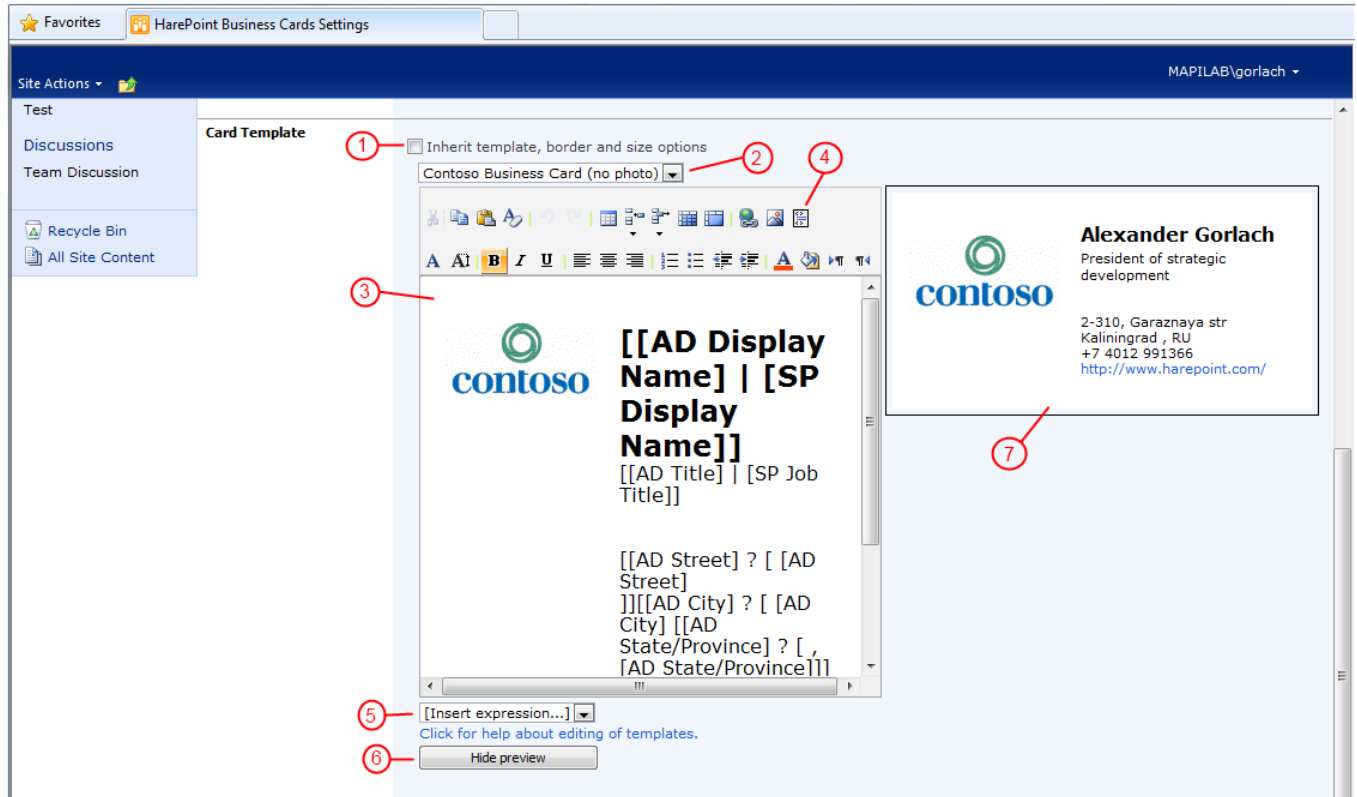
4 servers were found where the product is installed.



After entering the license key, the product trial version becomes fully functional. Note that if you install the product in two or more site collections, you have to enter the license keys in the product settings on each site collection individually.

3. Creation of the card template

A card template is the HTML code with inserts of macros which are replaced by the corresponding fields from the user's profile on the site or in Active Directory when displaying the card. By default, the visual editor is used for editing a template, but any time you can switch to code editing in HTML mode.



In the figure above:

1. Turning on the inheritance of settings for a card template, card size and frame design.
2. A list of ready templates to be inserted into the template editor.
3. The visual template editor.
4. Switching to the HTML code editing mode.
5. The button for inserting macros into the visual editor.
6. The button for displaying the preview pane.
7. The preview pane with a sample card (created on the basis of the current user's profile).

Macros used in the template are enclosed in square brackets and work under the following rules:

1. **Profile fields.** If the name of the field from the user's profile on the site or in Active Directory is put in square brackets, then when displaying the card the macro is replaced to the field value. For example: [AD Display Name] -> John Smith. The list of fields and their names is given in the Product settings at the level of site collection (see description of setting Properties in the previous chapter).
2. **Strings and tags.** If square brackets do not contain the name of the field, then when displaying the card the macro is replaced by the string enclosed in square brackets. For example: [John Smith] -> John Smith. You can use not only strings, but also HTML tags.
3. **Embedding macros.** Embedding of macros is allowed. For example: [Mobile Phone: [AD Mobile]] -> Mobile Phone: 8-900-666-33-11.
4. **IF logic.** The chain of macros, divided by operator "|" (OR) is replaced by the value of the first non-empty macro. For example, if information on the department is included neither into the profile on the site nor into the user's profile in Active Directory: [[SP Department] | [AD Department] | [Department is not defined]] -> Department is not defined.
5. **IF-THEN logic.** Two macros, divided by operator "?". Chain [[condition] ? [result]] is replaced by [result] if the disclosure of macro [condition] gives a non-empty string (or not zero for numeric fields), or by an empty string otherwise. For example: [[AD Mobile] ? [My mobile is [AD Mobile]]] -> My mobile is 8-900-666-33-11.
6. **IF-THEN-ELSE logic.** Three macros, divided by operators "?" and ":". [[condition] ? [true] : [false]]. For example: [[AD Mobile] ? [AD Mobile] : [AD Telephone]].

Macros can be added to the template either manually or using the button (marked by number 5 in the figure above). Note that when manually writing macros in the template the situation when the visual editor adds parasitic HTML tags to the text is possible. For example, the macro may look perfectly normal in the editor:

[AD Display Name]

But when viewing the HTML code (opened by the button marked with number 4 in the figure) macro will look as follows:

```
<b>[</b><b>AD Display Name</b><b>]</b>
```

This macro will not work as expected. To make sure that all the macros work properly, you can open the preview pane (marked with number 7 in the figure). Therefore it is recommended to insert macros in the template by the button.

To create complex card templates, or card templates on the sites with complex design, you may need to contact the webmasters. The Product does not impose any restrictions on the use of any HTML tags, fonts or styles in templates.

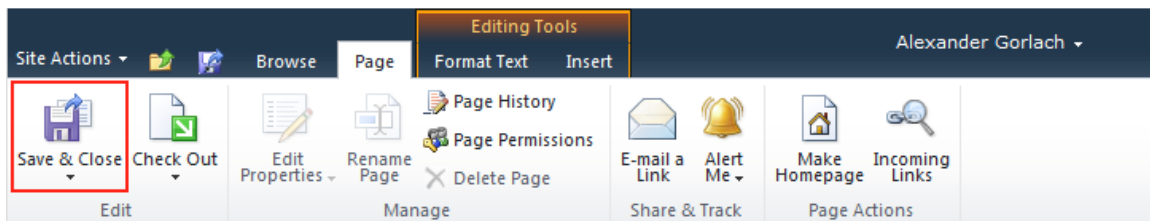
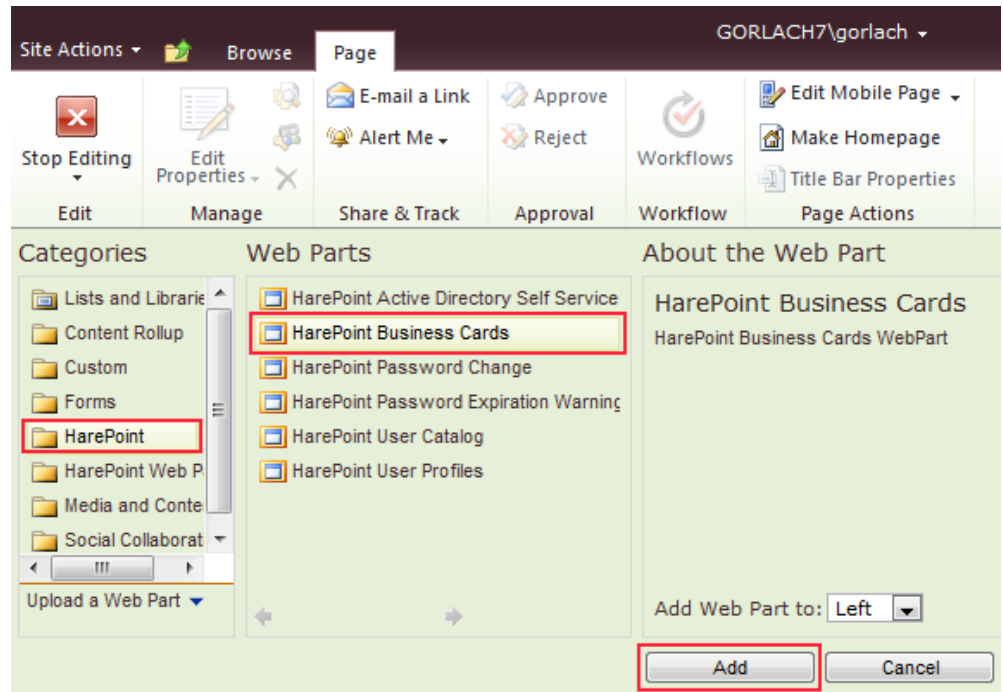
4. Adding web-part and configuring appearance

Note that you need Design permission level to modify web pages.

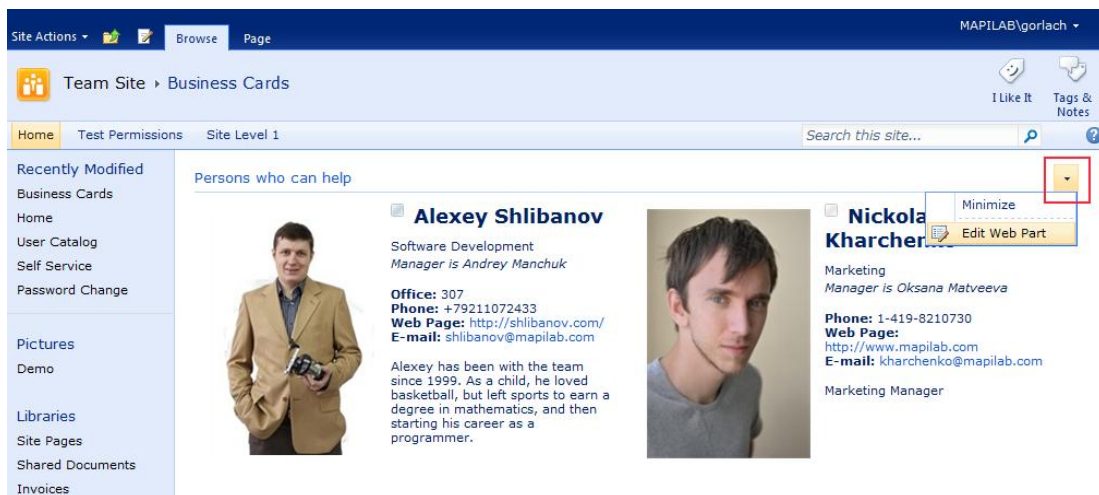
To add web-part to the page, click “Edit Page...” in “Site Actions” menu, go to “Insert” tab and click “Web Part” button.

After that, open HarePoint category and choose “HarePoint Business Cards” web-part and click Add button.

After inserting of web-part, click “Save & Close” button:

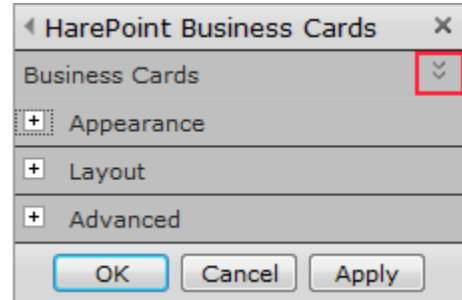


When you add web-part to the page, you can configure its appearance and layout in usual way by clicking “Edit Web Part” button:



To edit the settings of the list of displayed users or a card template at the level of a web-part, go to section "Business Cards". The description of settings is given in chapter 2 of this section.

A detailed guide for creating a card template is presented in chapter 3 of this section.



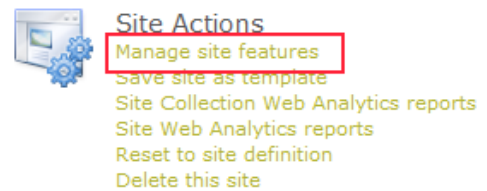
Appendix A. Troubleshooting

A.1 Product is not available at Site Collection Administration

Open “Site Collection Features” at Site Collection Administration and check that “HarePoint Business Cards” feature is activated.

A.2 Product settings are not available at Site Settings

Open “Site Settings” and follow “Manage site features” link in “Site Actions” sections. Check that “HarePoint Business Cards Site Settings” feature is activated.



A.3 Fields from Active Directory are substituted incorrectly

If macros containing the fields of Active Directory are displayed incorrectly for all or a part of users, check the credentials of the account specified in the product settings at the site collection in section "Active Directory Access Credentials".