

HarePoint User Catalog Manual

For SharePoint Server 2010 and SharePoint Foundation 2010.



Product version 1.2 August 22, 2011 (This Page Intentionally Left Blank)



Table of Contents

Table of Contents	3
. Introduction	4
I. Deployment	5
1. System requirements	5
2. Licensing and trial limitations	5
3. Installing HarePoint User Catalog	6
4. How to repair, upgrade or remove the Product	8
II. Product Overview	9
1. Getting started	9
2. Product settings	10
3. Adding web-part and configuring appearance	14
Appendix A. Troubleshooting	16

I. Introduction

With the help of HarePoint User Catalog you can easily publish the list of Active Directory and SharePoint users anywhere on portal pages. Using the Product filters and settings, you can filter the list of users and customize the set of visible fields. If you have individual pages of some organization departments, it is possible to publish the up-to-date list of department employees on such pages, and these lists will be updated automatically.

Alphabetical	•			م
Alexander Gorlach Alexander Kovalev Alexander Molchanov	^	Alexey Shlibanov		
Alexander Oleshov		General		
Alexey Shlibanov		First Name	Alexey	
Andrey Manchuk Angela Merkel		Last Name	Shlibanov	
Dmitry Medvedev	E	Title	Programmer	
Evgeniy Makarkhin		Description	klp18	
Fernando Alonso Grigory Kostromin		Department	Software Development	
Jenson Button		Office	307	
John Smith John Smith		Manager		
Karl Marx Legolas Eldarov		Telephones		
Michael Schumacher		Mobile	+7 (921) 1072433; +7906213	31256
Michael Tsiplakov mlstressuser1		Fax		
mlstressuser2		Telephone	+79211072433	
mlstressuser4		Address		
Nickolay Kharchenko Olga Tiapina		Street	Moskovskiy pr. 1-30	
Pavel Pallo		City	Kaliningrad	
Pavel Platto Pavel Sysoev		State/province	ко	
Roman Vashchegin		Country/region	Russia	

Product features:

- Displaying Active Directory and SharePoint users in navigation tree.
- Grouping users by site or organization unit, or show in alphabetical order.
- Display user's profile information.
- Define and organize user's properties to display.
- Search users by name with refining the list of users in real time.
- List of users may be filtered individually for each web-part instance.

II. Deployment

1. System requirements

HarePoint User Catalog is designed to operate in the following environments:

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

(hereinafter referred to as SharePoint).

The Product has no special requirements to operating system and its components, RAM and CPU. 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 User Catalog is licensed for the number of SharePoint Web Front-End Servers where "Microsoft SharePoint Web Application" service is running. The number of licenses should correspond to the number of servers. The 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 functional limitations
- 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 Commercial License and entering registration keys in the product settings, the product becomes fully functional.

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

3. Installing HarePoint User Catalog

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 drive. For Microsoft Office SharePoint Server 2007 and Microsoft Windows SharePoint Services 3.0, open subfolder **HarePointUserCatalog2007**, for Microsoft SharePoint Server 2010 and SharePoint Foundation 2010 open subfolder **HarePointUserCatalog2010**.

Run SETUP.EXE in the selected folder. Installation Wizard will start:

н	larePoint User Catalog for SharePoint 2010					
	HarePoint User Catalog for SharePoint 2010 Welcome to the HarePoint User Catalog for SharePoint 2010 setup wizard					
	This setup wizard will install and deploy HarePoint User Catalog for SharePoint 2010 to your SharePoint 2010 fam.					
	Previous <u>N</u> ext <u>Abort</u>					

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

1	HarePoint User Catalog for SharePoint 2010	
	System Check Checking if HarePoint User Catalog for SharePoint 2010 can be installed from this machine	
	 SharePoint Server 2010 is installed. You have permission to install and deploy SharePoint solutions. The SharePoint 2010 Administration service is started. The SharePoint 2010 Timer service is started. Solution file found. HarePoint User Catalog for SharePoint 2010 is not installed. New features specified: 1 	
	All checks succeeded. Please click Next to proceed with the installation.	
	Previous Next Abort	

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

At the next step of the Wizard, you'll choose site collections where the Product should be deployed. Select required site collections and follow the instructions of the Wizard to complete installation:

nstallation Successfully Completed	d Aug	7
Details: Info: ***** SOLUTION DEPLOYMENT ***** Info: Deploying to web application(s): SharePoint - 80. Info: GORLACH7 : http://gorlach7/ : The solution was <mark>sud</mark> Info: ***** FEATURE ACTIVATION ***** Info: http://gorlach7 : UserCatalog_Feature1 (575b6d9a-4	ccessfully deployed. if 4f-49ee-8e5b-26bb8736932d)	-

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. For Microsoft Office SharePoint Server 2007 and Microsoft Windows SharePoint Services 3.0, open subfolder **HarePointUserCatalog2007**, for Microsoft SharePoint Server 2010 and SharePoint Foundation 2010 open subfolder **HarePointUserCatalog2010**.

Run SETUP.EXE in the selected folder. Installation Wizard will be launched. 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 product components.

rePoint User Catalog for SharePoint 2010
Repair or Remove
Please select the operation you wish to perform
HarePoint User Catalog for SharePoint 2010 is already installed. What would you like to do?
Repair
Retracts the solution from all web applications and deploys it once again.
Remove
Retracts the solution from all web applications and deletes it.
Please click the Next button to start the selected operation.
Previous <u>N</u> ext <u>A</u> bort
ww.harepoint.com

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

III. Product Overview

1. Getting started



This product consists of two parts:

- Administration page at Site Collection Administration;
- Web-part that displays users catalog.

After the Product installation, the Product is ready to use, and anyone who has Design permissions can add HarePoint User Catalog to the site pages (see chapter 3 of this Section for details). The web part has five parts by default:

HarePoint User Catalog		5
2Organizational Unit 🔍		٩
germany.vlab.mapilab.local mapilab.local □ Staff	Alexey Shliba	anov 4
Alexander Gorlach Alexander Molchanov	General	
Alexander Oleshov	First Name	Alexey
Alexey Shlibanov Andrey Manchuk	Last Name	Shlibanov
Evgeniy Gubko	Title	Programmer
Michael Tsiplakov	Description	klp18
Nickolay Kharchenko	Department	Software Development
Pavel Pallo	Office	307
3 Pavel Sysoev Platto Pavel ≡	Manager	
Sergey Lysenko	Telephones	
⊡ Students	Mobile	+7 (921) 1072433; +79062131256
Alexander Kovalev Evgeniv Makarkhin	Fax	
Roman Vashchegin	Telephone	+79211072433
Vitaliy Knyazev Yury Bogdanov	Address	
vlab.mapilab.local	Street	Moskovskiy pr. 1-30
⊕ Elves	City	Kaliningrad
John Smith MAPILab Statistics Stress	State/province	ко
Users	Country/region	Russia

- 1. Web part title, may be customized in web-part settings individually for each web-part instance.
- 2. Group mode selector: alphabetically, by site or by organizational unit. Default grouping mode may be defined at the Product administration page; and the grouping selector may be hidden in the settings at administration page.
- 3. Navigational tree view. The list of users may be filtered with settings at the administration page (for all web-parts at site collection) and/or at web-part settings (individually for each web-part instance).
- 4. User profile. The set of fields may be defined and organized in the settings at administration page.
- 5. Search for users by name. Search settings are available at administration page.

This product is designed to be managed by Site Collection administrators. That means all settings have a scope of site collection. For example, if you have installed the Product on two site collections, you have to enter the same product licensing keys to the settings at both site collections.

2. Product settings

Go to Site Collection Administration. Open the "HarePoint User Catalog" link in the Site Collection Administration section:



The Product's settings page will be opened.

If you have product license, please enter the license code in the "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:

Lisonsos	
LICENSES	Trial mode: 30 days left.
Specify license keys for HarePoint User Catalog.	
	1 server was found where the product is installed.

Note: this Product is designed for managing by Site Collection administrators. It is means that all settings have a scope of site collection. For example, if you have installed the Product on two site collections, you must enter the same product licensing keys to the settings at both site collections.



User List Grouping	
Select default grouping and limit access to grouping options on the User Catalog web part.	Default grouping mode: Organizational Unit 💌
- ·	Allow user to change grouping mode

User List Grouping. With these settings you can select default value for web-part group mode selector and/or hide web-part group mode selector.

User List Source	
Select whether the user list is to be populated from the current SharePoint site collection, from the specified Active Directory containers, or from both.	 Only current site collection users Only users from the specified Active Directory containers Both current site collection users and the users from the specified Active Directory containers

User List Source. This setting has three options:

- Only current collection users. In this case, Product web-parts will display only current SharePoint site collection users. Note: when Organizational Unit grouping mode is selected, SharePoint users which are not Active Directory users will not be listed; not all actual Active Directory organizational units may be listed, and Active Directory users which are not SharePoint users will not be listed in organizational units.
- Only users from the specified AD containers. Each AD container name should be entered at the new line of the edit box below in the canonical name format (like *domain.local/department*). When Site grouping mode is selected, Active Directory users which are not SharePoint users, are listed in special "Non-SharePoint Users" node.

3. Both current site collection users and the users from the specified AD containers. Each AD container name should be entered at the new line of the edit box below in the canonical name format (like *domain.local/department*).

Note that user's list also may be filtered individually for each web-part instance, see chapter 3 of this Section for details.



User Properties. With these settings you can define and organize user's profile properties to be displayed.

Click "Edit Properties" button to view and edit the list of available properties:

HarePoint User Ca	atalog Propertie	es List		×
List Tools				
Items List				
🔲 Display Name	Property Type	Property Name	Additional Property	Â
About Me	SharePoint	About Me	None	
Account	SharePoint	Account	None	
Account Expires	Active Directory	accountExpires	None	Ξ
City	Active Directory	I	None	
Company	Active Directory	company	None	
Country/region	Active Directory	со	None	
Department	Active Directory	department	None	
Description	Active Directory	description	None	
Display Name	Active Directory	DisplayName	None	
E-mail	Active Directory	mail	None	
E-Mail	SharePoint	E-Mail	None	
Fax	Active Directory	facsimileTelephoneNumber	otherFacsimileTelephoneNumb	
First Name	Active Directory	givenName	None	
Home	Active Directory	homePhone	otherHomePhone	
Initials	Active Directory	initials	None	Ŧ
•			4	

To add new property, click select "Items" tab and click "New Item", property editor will be opened:

Harepoint U	Harepoint User Catalog Property List - New Item			
Edit				
Save Cancel	Paste			
Commit	Clipboard			
Display Name	*	Nickname		
Property Type	*	Active Directory		
Property Name *		 ◎ givenName ▼ ● Specify your own value: mailNickname 		
		Save Cancel		

- Display Name: the name of the property, to be displayed on the web-part.
- Property Type: Active Directory or SharePoint.
- Property Name: you can select the native name of the SharePoint property or Active Directory attribute from pre-defined list, or enter the name manually. In the second case, only basic types or properties are supported, like Date/Time, String or Number.

To define the web-part layout, click "Edit layout" button and layout editor will be opened:

HarePoint User C	Catalog Properties Layout List	×					
Group Name	User Properties List						
General	AD:First Name,AD:Last Name,AD:Title,AD:Description,AD:Department,AD:Office,AD:Manager						
Telephones	AD:Mobile,AD:Fax,AD:Telephone						
Address	AD:Street,AD:City,AD:State/province,AD:Country/region						
✿ Add new item							

In this window, you can add, remove and organize Active Directory and SharePoint user's profile properties on the web-part.



Limit Access to Web Part. Specify the users or groups that will not be able to view HarePoint User Catalog web part. Radio buttons will switch the list of users and groups below to "white list" or to "black list". Restricted users will see no HarePoint User Catalog web part, without any warning or notification.

3. 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 the "Site Actions" menu, go to the "Insert" tab and click the "Web Part" button. After that, open the HarePoint category and choose the "HarePoint User Catalog" web-part, and click the Add button.



After inserting web-part, click the "Save & Close" button:

				Editing Tools		Alexander Corlach			der Corlach -	
Site Actions -	ାର୍ଥ 🧏	Browse	Page	Format Text In	sert				Alexan	
P				Page History Page Permission	15				R	
Save & Close	Check Out	Edit Properties –	Rename Page	X Delete Page	E	-mail a Link	Alert Me 🗸	Make Homepage	Incoming Links	
Edi	t		Man	nage		Share 8	Track	Page A	ctions	

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

HarePoint Password Chan	je			_	$ (\cdot) $	1	HarePoint Password Change X			
Organizational Unit				\sim	Minimize P		Appearance			
B germany, vlab.mapilab.loca ▲ B staff Alexander Gorlach Alexander Molchanov Alexander Oleshov Alexey Shibanov Andrey Manchuk Evgeniy Gubko Grigory Kostromin Michael Tsiplakov	Alexey Shlibanov				Edit Web Part	>	Title HarePoint Password Change			
	General				Connections		Height			
	First Name	Alexey					Should the Web Part have a fixed height?			
	Last Name	Shlibanov					Pixels			
	Title	Programmer					No. Adjust height to fit zone.			
	Description	klp18		Width						
Nickolay Kharchenko	Department	Software Development					Should the Web Part have a fixed width?			
Pavel Pallo =	Office	307					Ves Pixels			
Pavel Sysoev Platto Pavel	Manager						No. Adjust width to fit zone.			
Sergey Lysenko Stanislav Kuzmin ⊜Students Alexander Kovalev Evgeniy Makarkhin Roman Vashchegin Vitaliy Knyazev	Telephones			Chrome State						
	Mobile	+7 (921) 1072433; +79062131256					Minimized			
	Fax						Norman			
	Telephone	+79211072433					Chrome Type			
	Address						Default 💌			
⊡ vlab.mapilab.local	Street	Moskovskiv pr. 1-30				-	+ Layout			
Alexey Navalny	City	Kaliningrad	_	Advanced						
John Smith MAPILab Statistics	City Chata (manufic an	Kaliningrad				_	E Filter Users			
	State/province	Ru					Include only users from the specified			
۰ (الس) •	Country/region	Russia					Active Directory containers.			
							Exclude users from the specified Active			
							Directory containers.			
							OK Cancel Apply			

In addition to the standard web-part appearance settings, there is also a special "Filter Users" section with two settings:

- Include only users from specified AD containers. In this setting you can specify one or more AD containers separated by semicolon in canonical name format (like *domain.local/department*). Leave this setting blank to include users from all containers.
- Exclude users from the specified AD containers. In this setting you can specify one or more AD containers separated by semicolon.

Note that these settings are individual for each web-part instance. See "User List Source" setting overview in chapter 2 of this Section, to learn how to filter the list of users for all web-parts within site collection.

Appendix A. Troubleshooting

A.1 Product is not available at Site Collection Administration

Open "Site Collection Features" at Site Collection Administration and check that the "HarePoint User Catalog" feature is activated.

A.2 Some users see a blank page without web-part.

Check the "Limit Access to Web Part" setting in the product settings in Site Collection Administration (see chapter 2 of Section III).