SCHOOLMESSENGER®

Setting Up the Staff Directory Portlet

Setting up a Staff Directory

The Presence Staff Directory portlet provides an easy to populate and manage staff directory. It also makes it really easy for teachers, administrators and other users to configure and share their user profiles.

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1. WHO SHOULD USE THIS GUIDE

This guide is written to be accessible to users of all technical backgrounds. While there is a brief section intended for administrators only, the guide as a whole is of use to teachers, administrators, and anyone who can add a portlet to a page.

2. ADDING A STAFF DIRECTORY PORTLET

The process for adding a staff directory portlet is the same basic process as for adding any other portlet to a page.

Set **Design Mode** to **On**.

Find the region where you wish to display your staff directory. In the Portlet Library, click on the **Content Management** category. Drag and drop the **Staff Directory** portlet on to the page.

3. SETTING UP THE STAFF DIRECTORY

To set up the staff directory, set **Design Mode** to **On**. Click ✏ in the corner of the **Staff Directory** portlet.

Tabs to Display

You will see the three default groups, **Administrative Staff**, **Staff**, and **Teachers** listed as three possible options for the directory. Check the ones that you wish to include in your staff directory. Each option that you check will get its own tab in the directory.

You can also choose additional groups by checking the **Selected Groups** checkbox and clicking on the User Picker to the right of the **Selected Groups** field. Click on the group or groups you wish to add and then click **Add** and **OK**. Each of those groups will now also have their own tab.

Default Sort Order

By default, the displayed sort order is by **Last Name** in **Ascending** order. However, you can choose between **First Name** and **Last Name** for the default item to sort by and specify whether to display the results in **Ascending** or **Descending** order.
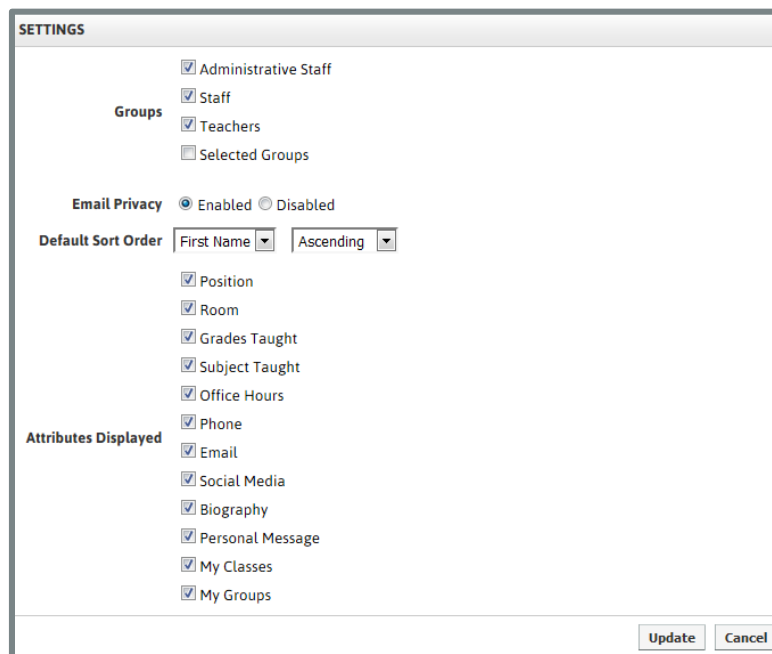
Email Privacy

With the **Email Privacy** setting, you can choose whether the user's email address will be shared or whether it will be hidden. In the event the address is hidden users can still email the teacher through a pop-up form by clicking on the ✉ icon.

Attributes to Display

You can also control which elements are shown from the user profile. The elements you can turn off or on are **Position**, **Room**, **Grades Taught**, **Subject Taught**, **Office Hours**, **Phone**, **Email**, **Social Media**, **Biography**, **Personal Message**, and **My Classes**.

Most of these attributes are configured directly from within a user's profile. However, there are some elements that require the user to be part of a class or group in order for the item to be displayed in the staff directory.

When you have finished selecting your **Attributes** click **Update** to save your changes.

To return to the normal view of the **Staff Directory**, click **View Mode** at the top right of the portlet.

4. SETTING UP GRADES TAUGHT

To set up the **Grades Taught** field and allow members of your teacher group to specify which grades they teach, go to **System Administration** and under **eLearning Server** in the right hand column, click on **Manage Course Levels**.

By default, the course levels will be Grades 1 through 12.

You can add new course levels by typing in the **Level Name** and clicking **Add**. You can also remove unwanted course levels by clicking on the red X and clicking **OK** to confirm that you wish to delete the level.

5. SETTING UP SUBJECTS TAUGHT

To set up the **Subjects Taught** field and allow members of your teacher group to specify which subjects they teach, go to **System Administration**. Under **General Administration** on the left hand column, click on **Manage Organization Structure** and then click on **Departments**.

To add a new department, set the **Department Type** dropdown to **Class** and type in your **Department Name** and click **Add**. You can also remove unwanted departments by clicking on the ❌ and clicking **OK** to confirm that you wish to delete the level.

6. USING THE STAFF DIRECTORY PORTLET

When you first load a page with the staff directory portlet, you will be on the All Users tab. That means that all users from all your selected tabs will be accessible and searchable.

To search for a user, type in the full or partial **Member Name** and click **Find**.

If you wish to only view the users for a specific group, click on the appropriate tab. You can view all members from that tab by clicking the **Find** or the **View All** buttons. Or you can enter additional search criteria and use the **Find** button.
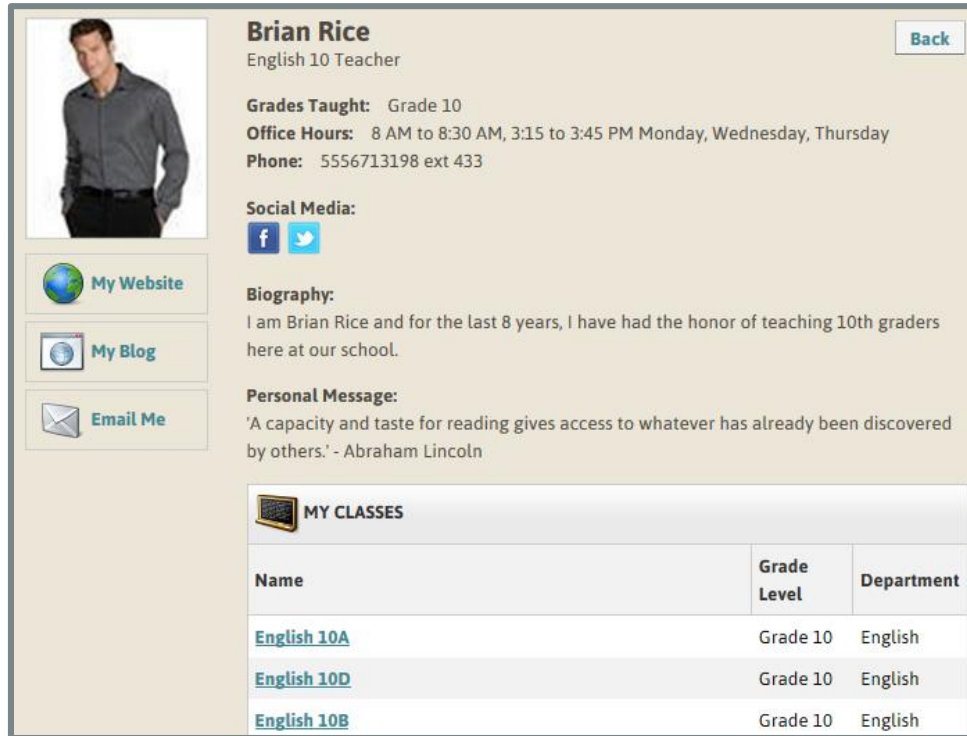
On most tabs, the only search criteria is the **Member Name**. However, on the **Teachers** tab you can also search by **Grade** and **Subject**.

Once you click **Find** or **View All** your results will be displayed.

You can change how many results display on a page by altering the **Page Size** drop down.

7. EXAMPLE OF A PROFILE WITHIN THE STAFF DIRECTORY PORTLET

8. SETTING UP YOUR PROFILE

After looking at how easy it is to set up the staff directory portlet, you may be wondering how exactly you go about setting your user photo, putting in links to your teacher page and other personal information. The process is quite simple.

To get to your profile, simply click on your username when you are signed in to the site. The exact placement of the username will vary depending on your site, but usually it is found on the top right, top left, or bottom middle of the page.

Now click on the **Edit User** tab.

Setting a Photo

To set a user photo, from the **Edit User** tab click on **User Photo**.

 Click **Browse** to select a photo. You can choose a jpg, gif, png or bmp photo file for your profile image.

Once you have selected it, click **Upload**.

You can also remove your current profile picture by clicking the ❌ to delete the image.

Modifying your User Profile

To make changes to your user profile, from the **Edit User** tab click on **User Profile**.

With the exception of the **Home Address** and the **Work Address** all elements from this user profile screen can be set to display on your user profile. If any of the fields are left blank, they will not be displayed as part of your profile.

The list of available fields are:

- **Job Title**

- **Gender:** To keep this field private, check the **Keep Private** box.

- **Self Description**

- **Website**: This will generally be your teacher page, but can be set to any website.

- **Blog**: This can be pointed at your Presence blog or any other blog.

- **Personal Message**

- **Room:** This field is only available for users in the **Teachers** group.

- **Grades Taught:** This field is only available for users in the **Teachers** group.

- **Subjects Taught:** This field is only available for users in the **Teachers** group.

- **Office Hours**: This field is only available for users in the **Teachers** group.

- **Facebook**

- **Google+**

- **LinkedIn**

- **Twitter**

- **YouTube**

- **Telephone Numbers:** Only the **Work** number will be displayed with in the **Staff Directory** portlet. If you wish to keep your phone number hidden, click the **Keep Private** option.

When you have finished with your profile, click **Update User** to save your changes.

Other elements of your profile, such as **My Classes** will appear only if they are applicable (i.e. only if you are instructing one or more classes).

9. SETTING WEBSITE AND BLOG FIELDS

In addition to going to the profile and typing in the URL for the user's website or blog, there is another way to populate this field that can be used when creating new pages.

Whenever you create a new blog page, you will have the option to replace your profile's blog link with a link to the blog page you are creating. Simply check **Replace my profile blog link with this blog** when you create the blog page.

ADD BLOG PAGE

Title	Mr. Rice's Book Blog
Name	mr__rice_s_book_blog
Blog	◉ Create a New Blog ○ Link to an Existing Blog
Option	◉ Open the external link page in existing window ○ Open the external link page in a new window
	☐ Replace my profile blog link with this blog
	Create Page Cancel

Similarly, whenever you create any other type of page (with the exception of an **External Link Page**) you will have the option to **Replace Page Owner's website with this page**. If you utilize this option, be sure that you set the **Page Owner** or else you will replace your own profile's website field instead.