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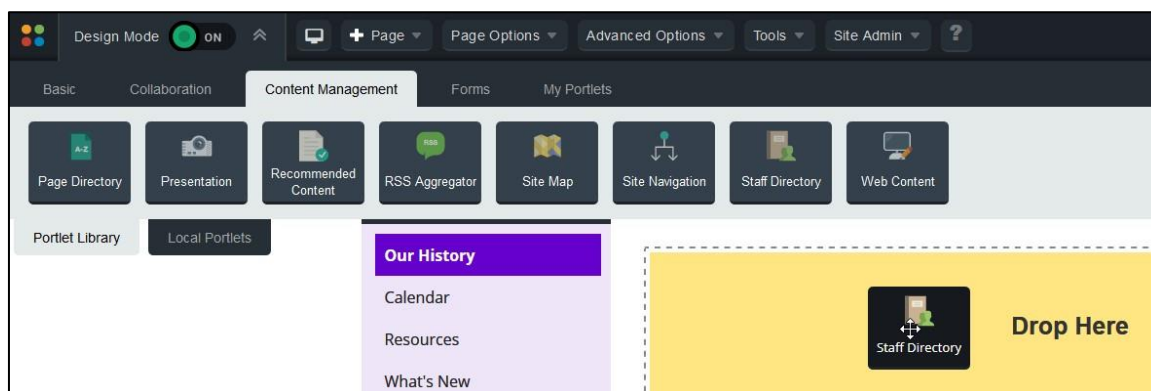# Staff Directory Portlet Guide

Contents

Introduction

The Staff Directory portlet allows you to automatically generate a searchable list of users. You can choose which groups are included in the directory as well as what fields you wish to share with people viewing the directory.

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.

Setting up the Staff Directory

To set up the staff directory, set **Design Mode** to **On**.

Click ✎ in the top-right corner of the **Staff Directory** portlet.

Groups to Include

When you first add a staff directory portlet, it will display all users in three default groups, **Administrative Staff**, **Staff**, and **Teachers**. Uncheck the ones that you do not wish include in your staff directory. Each group that is checked will be included in the directory portlet.

You also choose additional groups by checking the **Selected Groups** checkbox and clicking on the 📁▾ 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.

Excluded Users

If you wish to exclude users from the staff directory portlet, even though they are part of one of the groups you have selected to display, click on the 📁▾ icon for **Excluded Users**. Click the user(s) you wish to exclude and click **Add**. Once you have added all the users you wish to exclude, click **OK**.

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. If you choose to enable email privacy the portlet will display a ✉ icon instead of the email address.

If you disable the email privacy, then you have the option to **Enable mailto to use external email application**. If this feature is enabled, then when a user clicks on an email address, the browser will attempt to open the user's default email client to send an email. If the option is not checked, it will use the Presence Send Email control instead.

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.
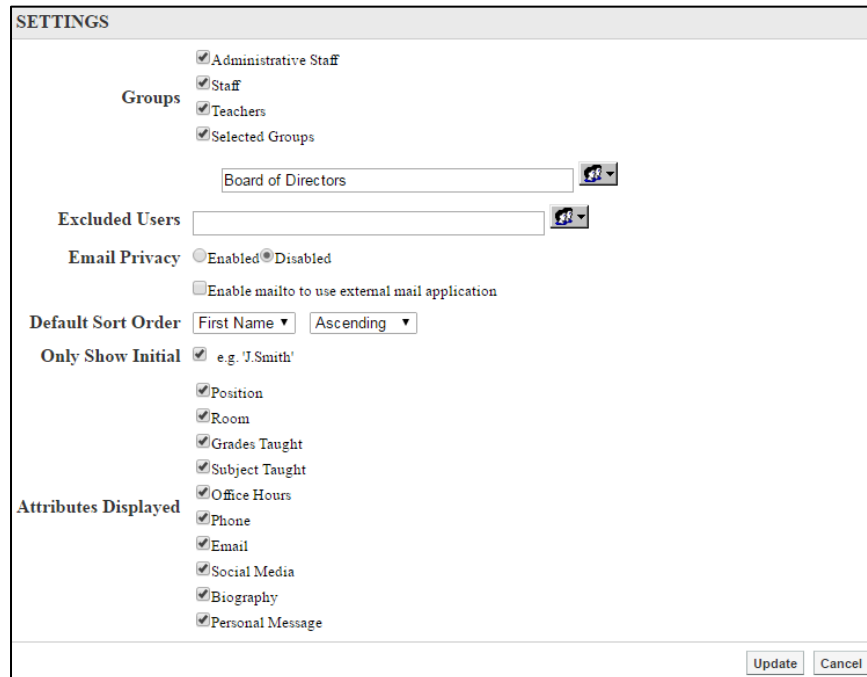
Only Show Initial

If you wish, you can choose to only show the first initial of the users being displayed in the staff directory (in place of showing their first name). To do so, check the **Only Show Initial** option and click **Update**.

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**, and **Personal Message**.

Most of these attributes are configured directly from within a user's profile.

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.

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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 (or grades) 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 ⊗ icon and clicking **OK** to confirm that you wish to delete the level.

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**.
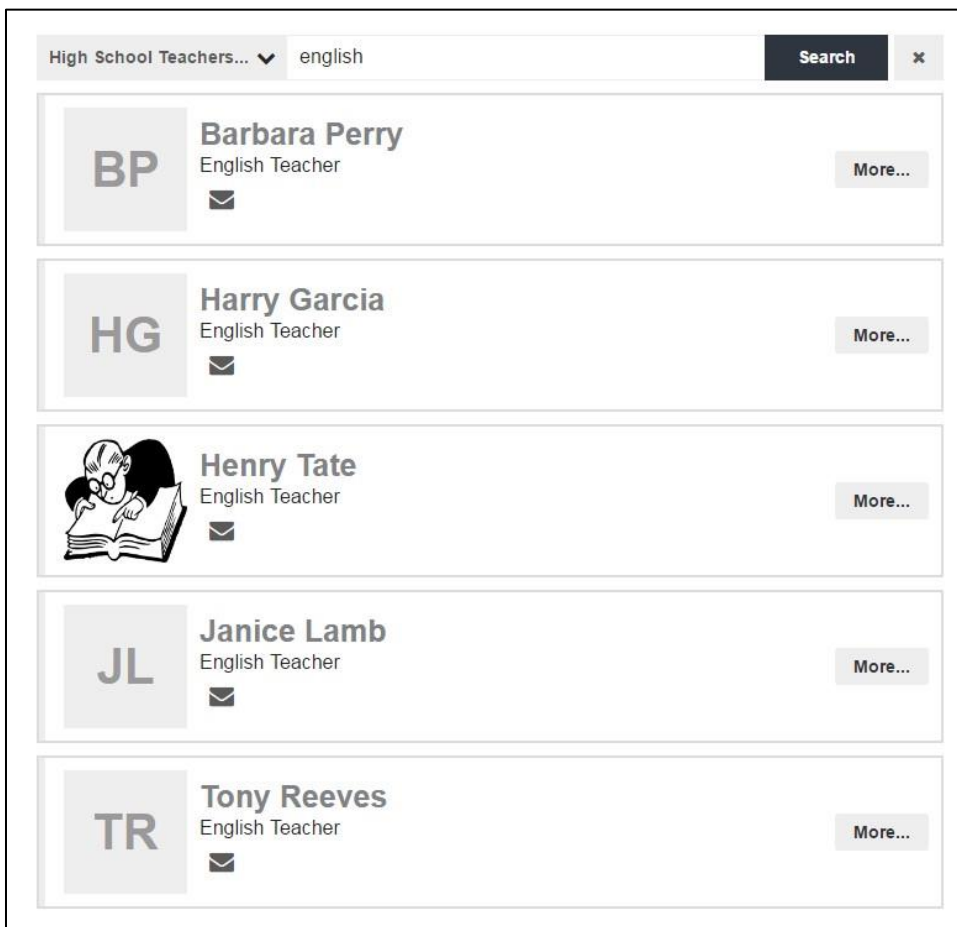
You can also remove unwanted departments by clicking on the ⊗ icon that you wish to remove then click **OK** to confirm.

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Using the Staff Directory Portlet

To search for a user, type in the full or partial first name, last name, or job title and click **Search**. If **Email Privacy** is disabled, then you can also search by email address.

If you wish to only view the users for a specific group, click on the **All** dropdown and choose the group you desire. You can view all members from that tab by clicking **Search**. Or you can enter additional search criteria and use the **Search** button.

Once you click **Search** your results will be displayed.

If there are more than 10 results, you can use the page controls found at the bottom of the results to navigate.

Example Staff Directory Profile

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 **Choose File** 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**: This will display as your biography in the Staff Directory.

- **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**

- **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.

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.

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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.

NEW PAGE ✖

Page Name*

News and Events

Page URL*

news_and_events 🔒

Page Owner

charlie.danner 👥 ✔ Replace Page Owner's website with this page

Create Cancel