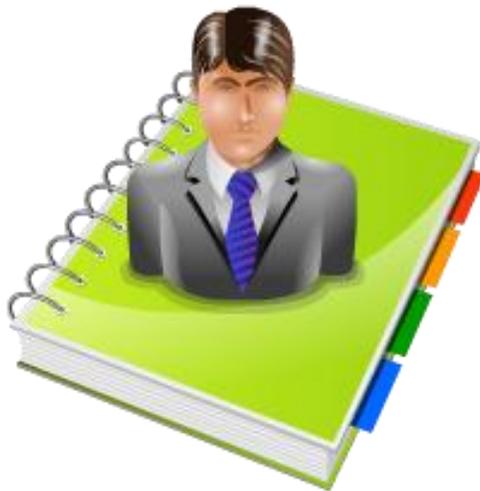




HarePoint User Catalog Manual

For SharePoint Server 2010 and SharePoint Foundation 2010.



Product version 1.2

August 22, 2011

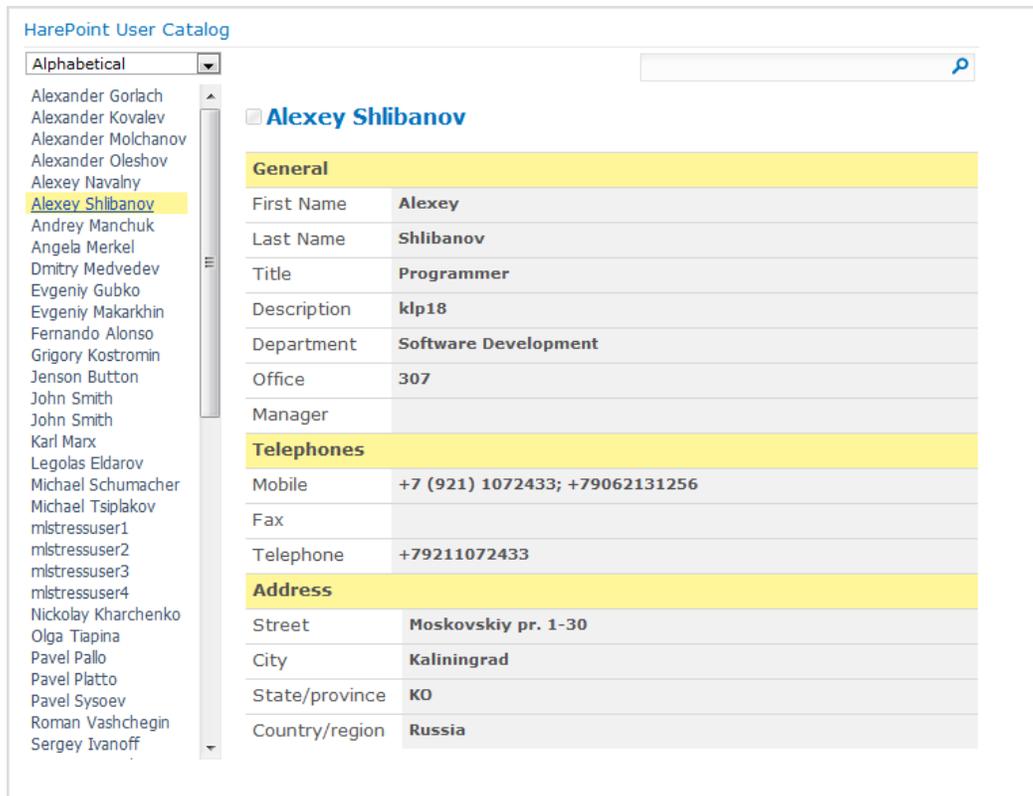
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I. Introduction

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.



The screenshot displays the HarePoint User Catalog interface. On the left, there is a navigation tree with a dropdown menu set to 'Alphabetical'. A list of user names is shown, with 'Alexey Shlibanov' highlighted. On the right, the profile for Alexey Shlibanov is displayed, featuring a search bar and a magnifying glass icon. The profile is organized into sections: General, Telephones, and Address.

General	
First Name	Alexey
Last Name	Shlibanov
Title	Programmer
Description	klp18
Department	Software Development
Office	307
Manager	

Telephones	
Mobile	+7 (921) 1072433; +79062131256
Fax	
Telephone	+79211072433

Address	
Street	Moskovskiy pr. 1-30
City	Kaliningrad
State/province	KO
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 <http://www.harepoint.com/> for more details about Product licensing.

3. Installing HarePoint User Catalog

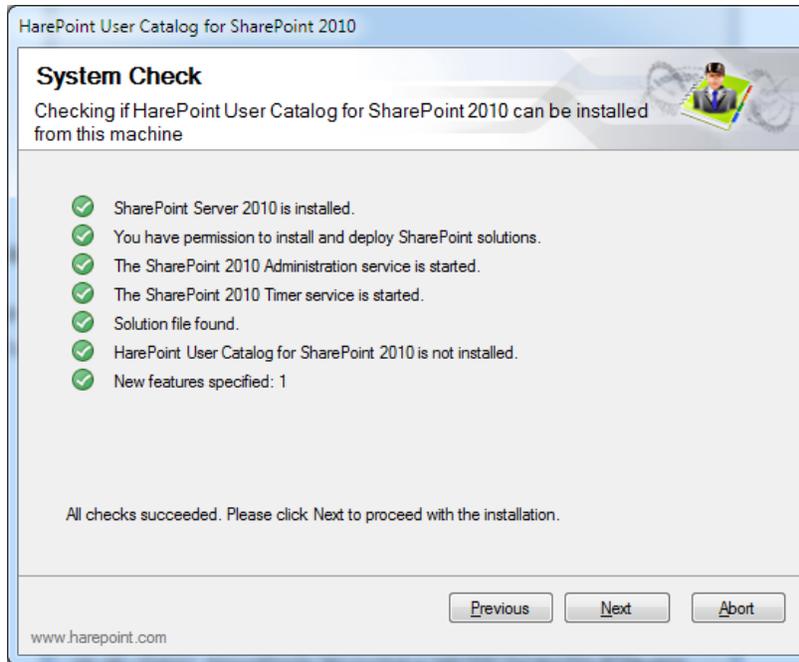
To install the product you'll need Farm Administrator rights.

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:

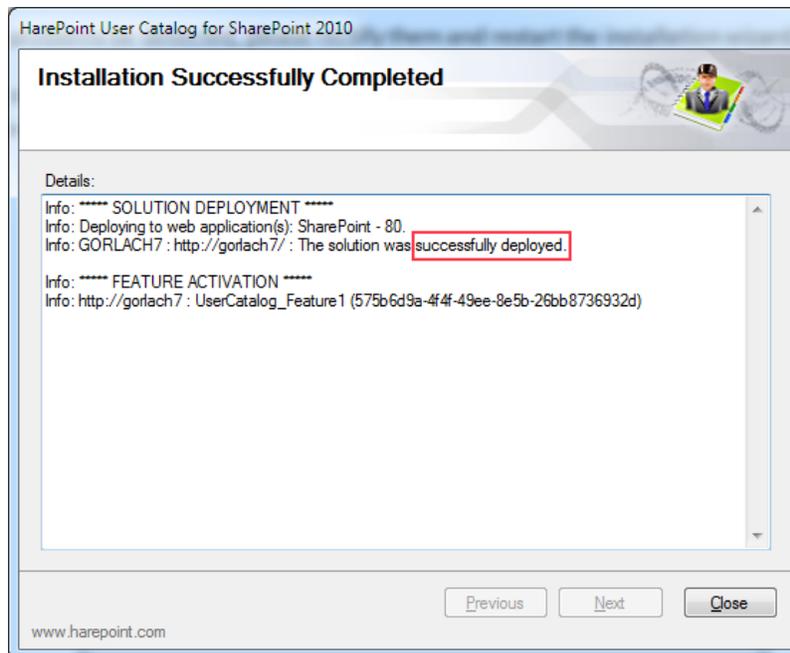


Press Next button on the wizard's welcome screen, and the wizard will check if the product can be installed:



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

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



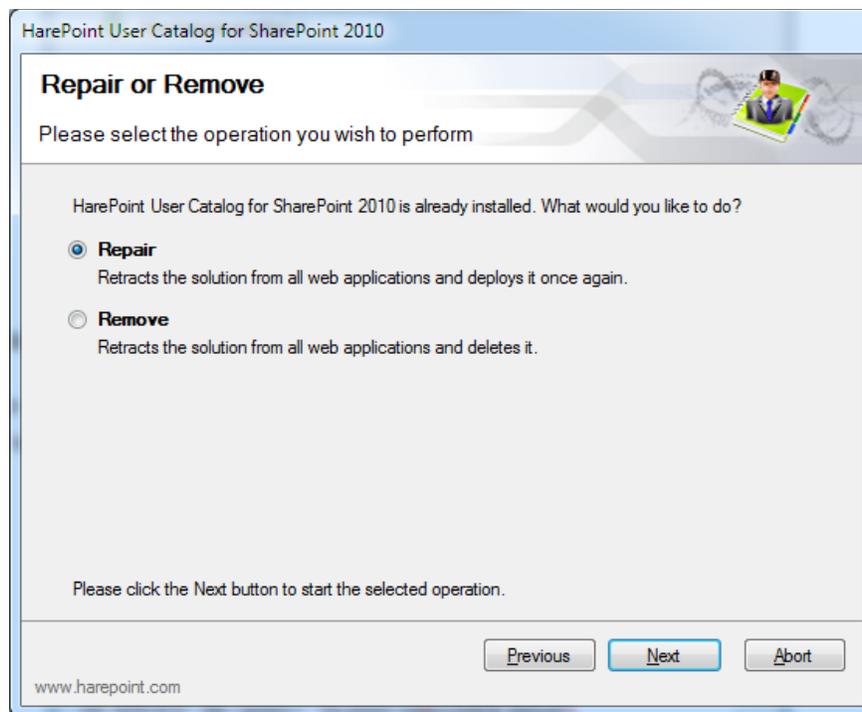
See the Section III of this manual for the Product settings overview.

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. 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.



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:

General	
First Name	Alexey
Last Name	Shlibanov
Title	Programmer
Description	klp18
Department	Software Development
Office	307
Manager	

Telephones	
Mobile	+7 (921) 1072433; +79062131256
Fax	
Telephone	+79211072433

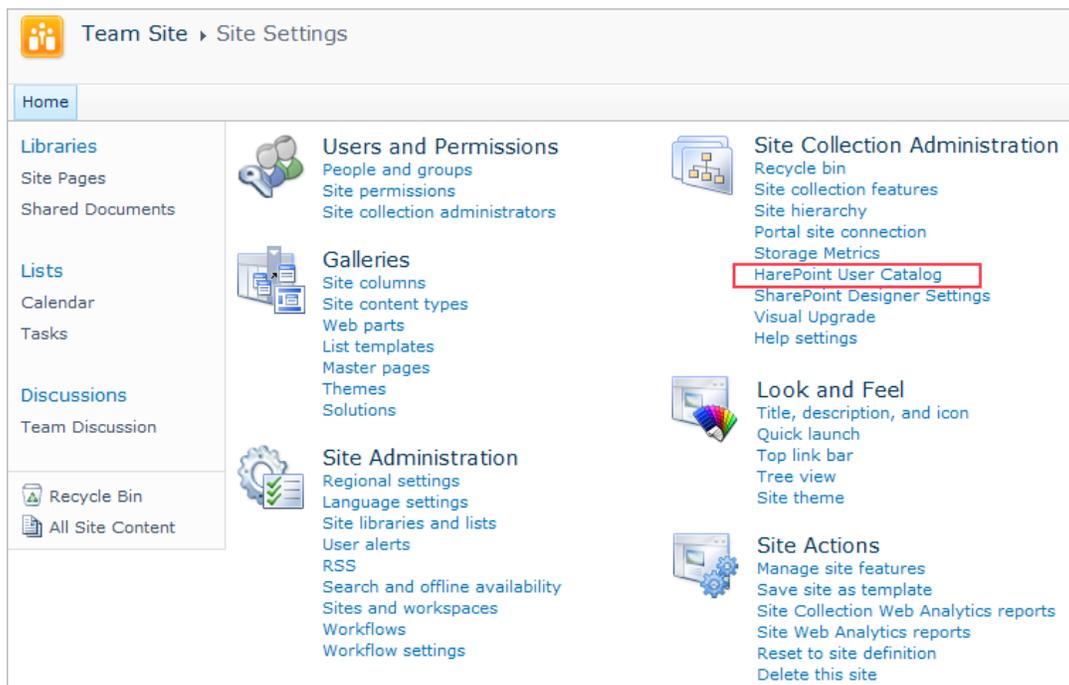
Address	
Street	Moskovskiy pr. 1-30
City	Kaliningrad
State/province	KO
Country/region	Russia

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:



Note: this Product is designed for managing by Site Collection administrators. It 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.

Search Option
Specify search option used to filter data in user catalog.

- The user display name starts with the specified search string.
- The user display name ends with the specified search string.
- The user display name contains specified search string.

Search Option. These settings are defining the behavior of the web-part search box.

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

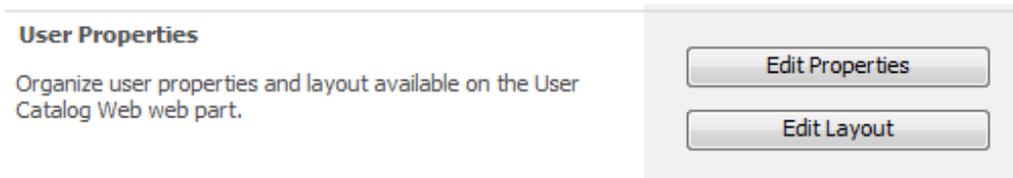
[Empty text box for specifying Active Directory containers]

User List Source. This setting has three options:

1. 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.
2. 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.

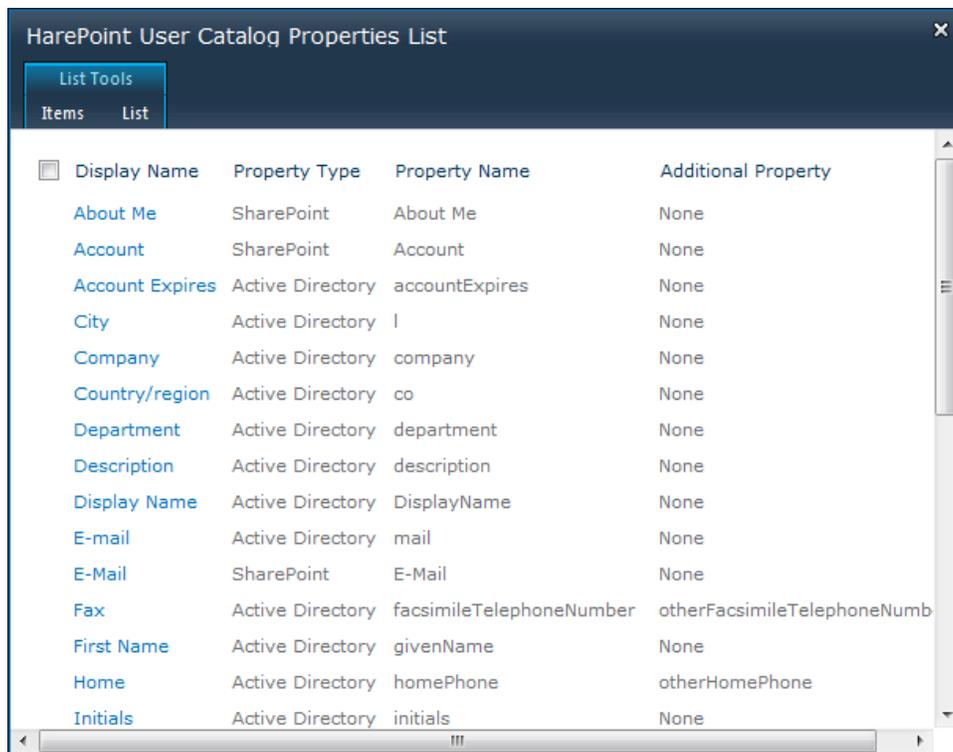
- Both current site collection users and the users from the specified AD containers. Each AD container name should be entered at the new line of the edit box below in the canonical name format (like *domain.local/department*).

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

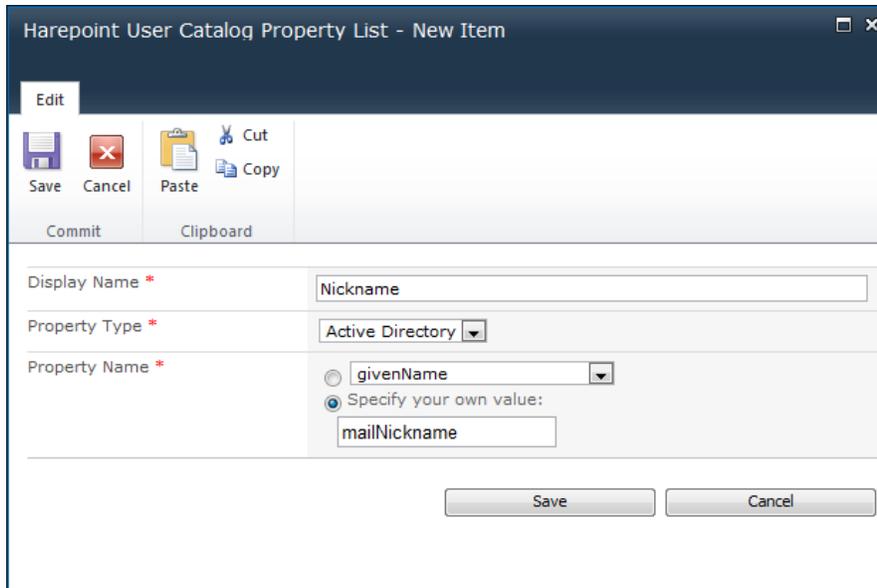


User Properties. With these settings you can define and organize user's profile properties to be displayed.

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

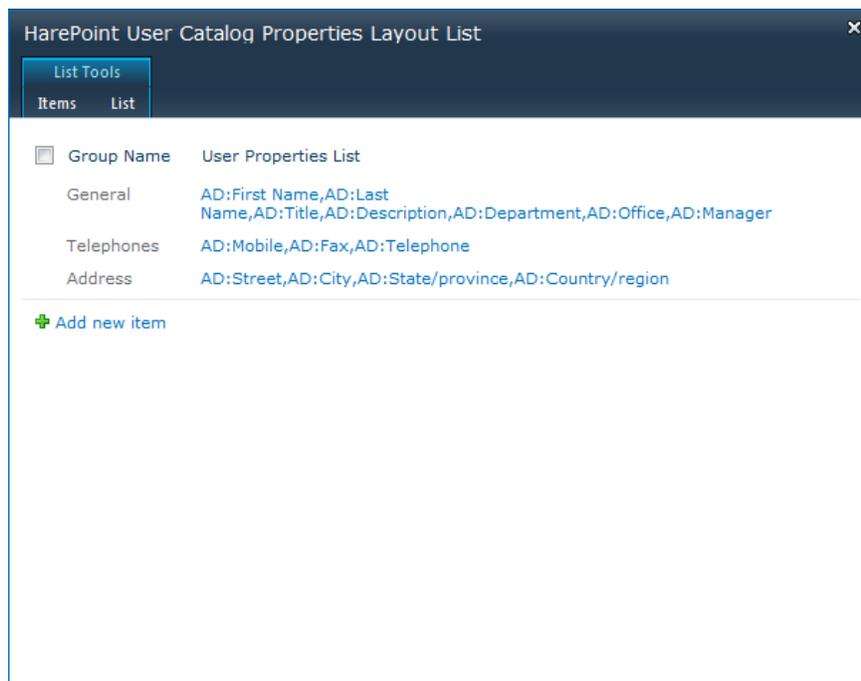


To add new property, click select "Items" tab and click "New Item", property editor will be opened:

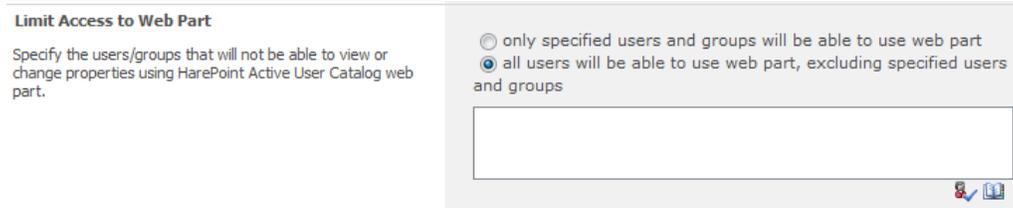


- Display Name: the name of the property, to be displayed on the web-part.
- Property Type: Active Directory or SharePoint.
- Property Name: you can select the native name of the SharePoint property or Active Directory attribute from pre-defined list, or enter the name manually. In the second case, only 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:



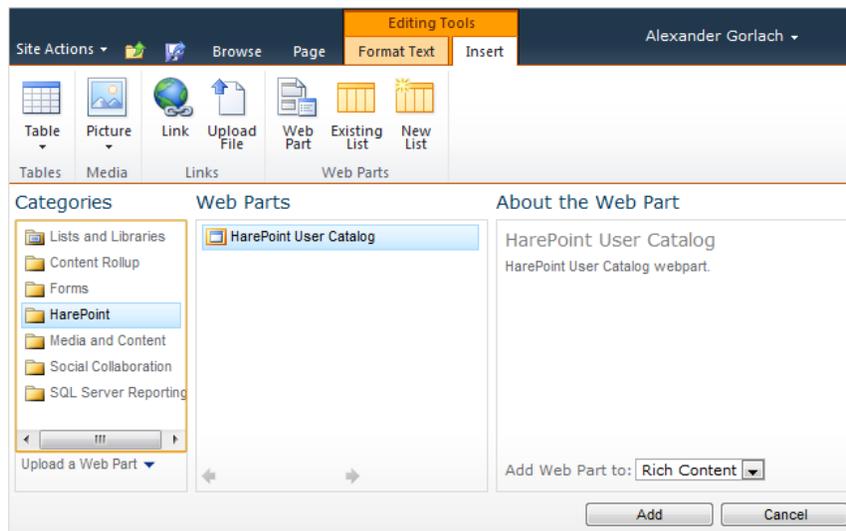
In this window, you can add, remove and organize Active Directory and SharePoint user's profile properties on the web-part.



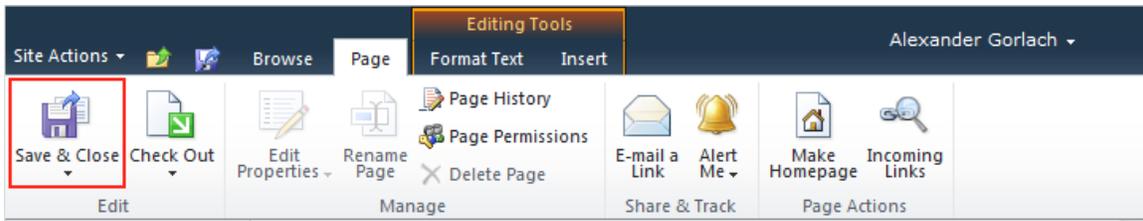
Limit Access to Web Part. Specify the users or groups that will not be able to view HarePoint User Catalog web part. Radio buttons will switch the list of users and groups below to “white list” or to “black list”. Restricted users will see no HarePoint User Catalog web part, without any warning or notification.

3. Adding web-part and configuring appearance

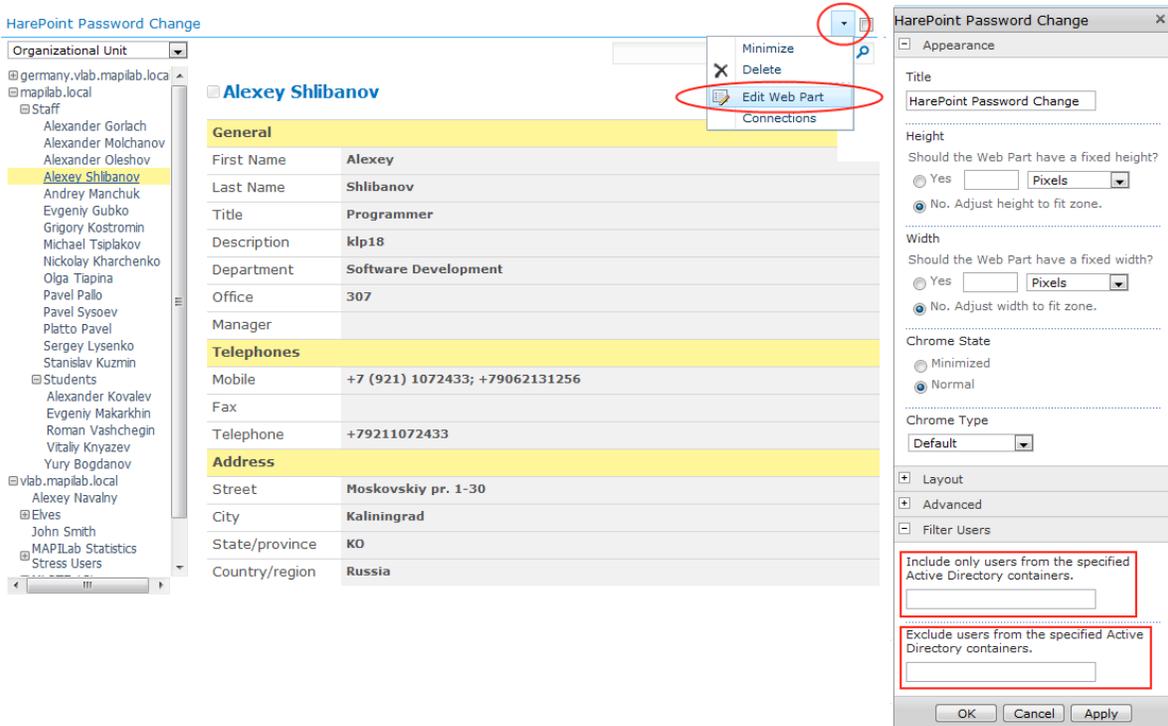
Note that you need Design permission level to modify web pages. To add web-part to the page, click “Edit Page...” in the “Site Actions” menu, go to the “Insert” tab and click the “Web Part” button. After that, open the HarePoint category and choose the “HarePoint User Catalog” web-part, and click the Add button.



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



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:



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).