Birthday & Anniversary Web Part

Enterprise Version

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Version 1.0

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Description

The "Birthday & Anniversary" Web Part selects the forthcoming birthdays or anniversaries of users from the MOSS User Profile Store and displays the selected profile property fields in a freely configurable template. The selection is based upon the User Profile "Birthday" and "Hire Date" fields.

The Web Part requires Windows Sharepoint Server 2007 (MOSS)
Please note that this web part is not compatible with Windows Sharepoint Services V3.

Prerequisites

Before you attempt to install the solutions you need to make sure that you have the following installed on your server(s):

- Microsoft Office SharePoint Server 2007

Installation

Manual Installation

1. download and unpack the **AEBirthdayWebpart.zip** file.
   The ZIP archive contains the AEBirthdayWebpart.dll and the AEBirthday.webpart files.

2. drop the AEBirthdayWebpart.dll into the GAC of your Sharepoint server (c:\windows\assembly).

3. add the following line to the "<SafeControls>" section of your Web.Config file.
   Please make sure that the line is added as one single line (no line breaks):

   ```
   <SafeControl Assembly="AEBirthdayWebpart, Version=1.0.0.0, Culture=neutral,
   PublicKeyToken=41cfd3df6f3c2859" Namespace="AEBirthdayWebpart" TypeName="*" Safe="True" />
   ```

4. from the top site go to "Site Actions/Site Settings/Modify All Site Settings/Galleries/Web Parts"

5. use the "Upload" menu option to upload the AEBirthday.webpart file.

Automatic Installation

1. Unpack the **AEBirthdayWebpart.wsp** and **Install.bat** files from the Zip Archive and place the 2 files onto your Sharepoint Server.

2. Add the Solution by either running **Install.bat** or manually entering:
   ```
   stsadm -o addsolution -filename AEBirthdayWebpart.wsp
   ```

3. Deploy the solution by navigating with your browser to "Central Administration->Operations->Solution Management":
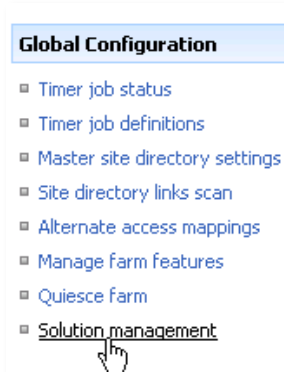
4. You should now see the **AEBirthdayWebpart.wsp** in the farm's solution store:

Click on "AEBirthdayWebpart.wsp" to deploy the solution:

5. Proceed to activate the feature by navigating to the "**Site Actions/Site Settings**" page in your top-level site:

Choose "**Site collection features**" to navigate to the Site Collection Features page:

Activate the "AE Birthday Web Part" feature

Adding the Web Part to a Page

Navigate to a page where you would like to place the web part and choose "*Site Actions/Edit Page*"

1. Add the web part to the appropriate zone. The web part is listed in the "**Amrein Engineering**" gallery section :
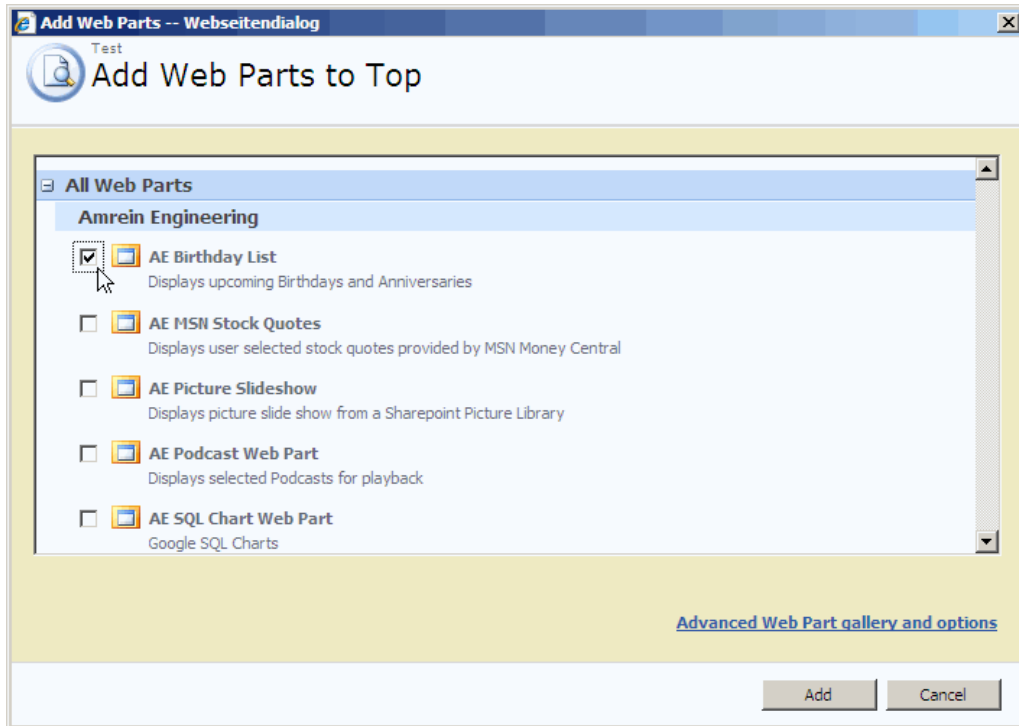
2. **Security Note:**
   if you get the following error message: "*Only an administrator may enumerate through all user profiles*", you will neeed to grant the application pool account(s) for the web application(s) „Manage User Profiles" permissions within the SSP.
   This ensures that the application pool is able to retrieve the list of user profiles.
   To assign this permission, access your active Shared Services Provider via Central Admin.
   From the „**User Profiles and My Sites**" group, click "**Personalization services permissions**".
   Add the „**Manage User Profiles**" permission to your application pool account(s).

Web Part Configuration

Configure the following Web Part properties in the Web Part Editor "Miscellaneous" pane section as needed:

o **Site Name**:
   Enter the name of the site (Shared Services Provider) that contains the User Profile Store:
   - leave this field empty if the User Profile is in the default SSP
   - Enter "current" if the User Profile is in the current site
   - Enter the Site name to choose a specific SSP

o **Field Template**: Enter the User properties to be displayed (separated by semicolons).
   The following properties are available:

▪ AccountName	▪ PictureURL	▪ SPS-Dotted-line
▪ FirstName	▪ UserName	▪ SPS-Peers
▪ LastName	▪ QuickLinks	▪ SPS-Responsibility
▪ PreferredName	▪ WebSite	▪ SPS-Skills
▪ WorkPhone	▪ WorkEmail	▪ SPS-PastProjects
▪ Office	▪ Assistant	▪ SPS-Interests
▪ Department	▪ CellPhone	▪ SPS-School
▪ Title	▪ Fax	▪ SPS-SipAddress
▪ Manager	▪ HomePhone	▪ SPS-Birthday
▪ AboutMe	▪ PersonalSpace	▪ SPS-MySiteUpgrade
▪ Presence		▪ SPS-HireDate

Hiding individual columns:
You can hide a column by prefixing it with a "**!**" character.
The following example hides the "Department" column:
FirstName;LastName;SPS-Birthday;!Department

Online Presence Information:
You can optionally add a presence indicator by adding the **Presence** column to the Field Template:

o   **Property Filter**: enter an optional Filter condition to apply a filter. Combine multiple conditions with **AND** and **OR**.
    You can choose from the following filter operators:

Operator	Description
AND	Combines more than one clause. Records must match all criteria to be displayed.
OR	Combines more than one clause. Records must match at least one of the filter expressions
NOT	Reverses an expression. Can be used in conjunction with any other clause.
<, >, <=, and >=	Performs comparison of values. These comparisons can be numeric, or alphabetic.
BETWEEN	Specifies an inclusive range. Example: Units BETWEEN 5 AND 15
<>, =	Performs equality testing.
IS NULL	Tests the Property for a null value.
IN(a,b,c)	A short form for using an OR clause with the same field.
LIKE	Performs pattern matching with string data types.
+	Adds two numeric values, or concatenates a string.
−	Subtracts one numeric value from another.
*	Multiplies two numeric values.
/	Divides one numeric value by another.
%	Finds the modulus (the remainder after one number is divided by another).

Examples:
Department='IT'
Department<> 'Sales'
Department IN ('Sales', 'Development', 'IT')
LastName NOT IS NULL AND Department='Sales'

o   **Nbr of Days to show**: enter the number of days into the future (starting from the current date) to include in the list.

o   **Anniversary:** enter the number of years for the desired anniversary (eg. "10" etc.). Set the value to zero if you want to display upcoming birthdays.

o   **User Picture Height**: specify the image height in pixels if you include the "PictureURL" property.
    Enter "0" if you want to use the default picture size.

o   **Header Text**: enter an optional header text to be displayed in the header section. Please note that you can embed HTML tags if needed.
    Example: **<p align=center>We'd like to congratulate!</p>**

o   **Header Image URL:** optionally enter the URL of the header background image. The image can be stored in a Sharepoint Picture Library or on a web server.

o   **Header Height**: enter the desired header height in pixels (set to zero if no header is needed)

o   **Background Color:** enter the optional color of the alternating row background (leave blank to use default). Enter the

value either as an HTML color name (eg. **red**) or as an #RRGGBB vale (eg. **#FF99CC**)

o   **My Site Link:** optionally enter the name of the column to be used as a hyperlink to the user's My Site page.

o   **License Key:** enter your Product License Key (as supplied after purchase of the "Staff Directory Web Part" license key). Leave this field empty if you are using the free 30 day evaluation version or if you choose one of the License Activation described below.

License Activation

You have the following 3 options to enter your License Key:

1. Enter the License Key into the corresponding "License Key" field in the web part configuration pane (See above).

2. **WSP Solution Deployment:**
   Add the **License.txt** file (as supplied by AMREIN ENGINEERING after having purchased a license) to the Solution at the following location:

   ```
   c:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\template\features\AEBirthdayWebpart
   ```

3. **Manual Deployment:**
   Add the License Key to your web.config (typically found at c:\inetpub\wwwroot\wss\virtualdirectories\80) **<appSettings>** section as follows:

   ```
   <appSettings>
   <add key="AEBD" value="AEBD-x-xxxxx-xxxxx-xx-xx" />
   </appSettings>
   ```

   Replace the "x" characters with your actual key values.
   Please note that this method requires you to manually add the key to each Sharepoint application.