



PRODUCT DOCUMENTATION

Saketa Employee Directory Pro

Product Guide

A SharePoint application that lets employees search, filter and export your organization's employee directory from inside SharePoint Online.

Document	Product Guide
Version	1.0 September 2026
Publisher	Saketa, a Praval Company
Platform	SharePoint Online

Document Information

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Product	Saketa Employee Directory Pro
Document version	1.0, September 2026
Audience	SharePoint site owners, administrators and end users

Related documents

This guide is one of four documents in the product documentation set, each published as a separate PDF. Select a document name to open it.

Document	Contents
Product Guide (this document)	What the product does, and how end users and administrators work with it.
Installation and Configuration Guide	Tenant deployment, site installation, page creation, API access approval and licence activation.
Microsoft Graph API Permissions	Every permission requested, why it is required, and how an administrator approves or revokes it.
Support Document	Support channels, availability, severity definitions, escalation and product lifecycle.

All documents are available at <https://saketa.com/docs/employee-directory/>

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1. Introduction

As an organization grows, keeping employee details current and easy to find gets harder.

Saketa Employee Directory (ED) Pro is a SharePoint application that displays employee information within an organization in a simple, compact and structured way. It reads the profile information your organization already maintains, so employees can search, filter and browse the directory without leaving SharePoint.

2. Prerequisites

- Employee Directory uses SharePoint profile information, generally synchronized from Active Directory. SharePoint profile services must be activated with an incremental directory synchronization.
- SharePoint search must be activated and crawled.
- To install or configure the app you need to be a tenant administrator (Microsoft 365).
- The Microsoft Graph permissions the app requests must be approved by a tenant administrator. See the *Microsoft Graph API Permissions* document.

3. Features

- Quick, dynamic search for employees as you type.
- Configurable filters: search by department, job title, office location, skills and more.
- List view and card view, with automatic (lazy) loading of more employees as you scroll.
- A collapsible side navigation for Directory, My Reportees, My Department, Export and App Settings.
- A quick profile snapshot with work and personal information, manager and reportees.
- Customizable appearance: theme (light or dark), header style and default view, with a live preview.
- Export employee details to Excel or PDF with selectable fields.
- An optional Pro-only Mesh overlay giving quick access to Calendar, Groups, Teams, Mail, OneDrive and more from your own profile panel.

4. User roles

Employee Directory can be used by two kinds of users:

- **Administrator:** can open App Settings to configure filters, theme, branding, employee-profile fields and export access.
- **User:** can view, search, filter, sort and export (if permitted) employee information, and view their own profile.

5. Home page

The home page is made up of three areas: a collapsible **side navigation** on the left, a **welcome banner** and **search and filter** bar across the top of the content area, and the main **employee list or card area** below it.

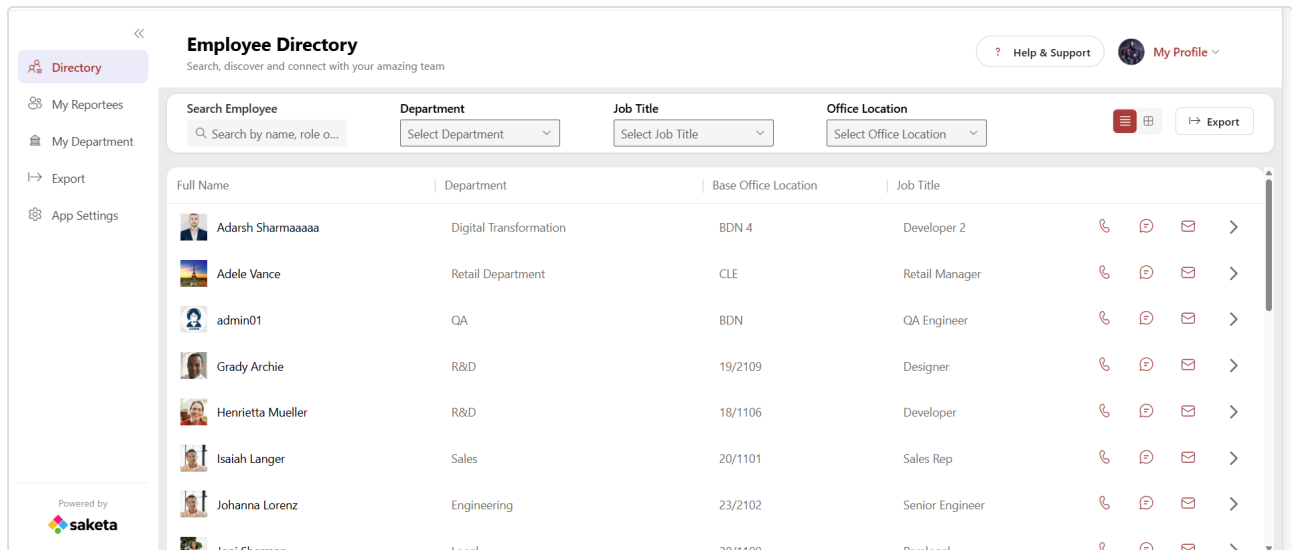


Figure 1: Home page with side navigation, welcome banner, filters and employee list

6. Side navigation

The left navigation bar can be collapsed or expanded using the chevron toggle at the top.

- **Directory:** shows all employees in the organization.
- **My Reportees:** shows employees who report to you.
- **My Department:** shows employees in your own department.
- **Export:** opens the export screen. Visible to administrators, or to everyone if export access is set to Everyone.
- **App Settings:** opens the administrator configuration panel (gear icon). Visible to administrators only.

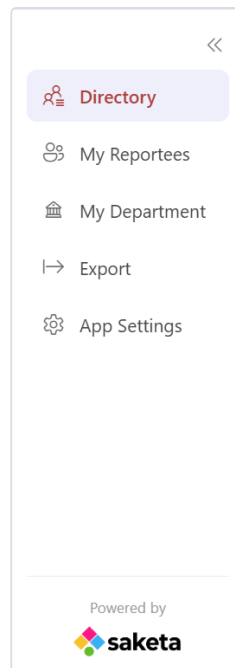


Figure 2: Side navigation, expanded

7. Welcome banner

The banner shows the app title and slogan (both configurable by an administrator), a **Help & Support** button that opens this guide, and a **My Profile** persona in the top-right corner. Clicking My Profile opens the same employee detail panel described in Section 10, loaded with your own information.

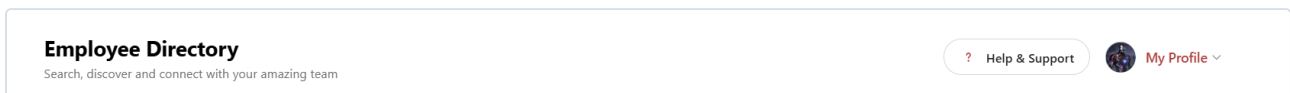


Figure 3: Welcome banner with title, slogan, Help & Support and My Profile

8. Search and filters

Type a name, job title or skill into the search box to filter the employee list as you type.

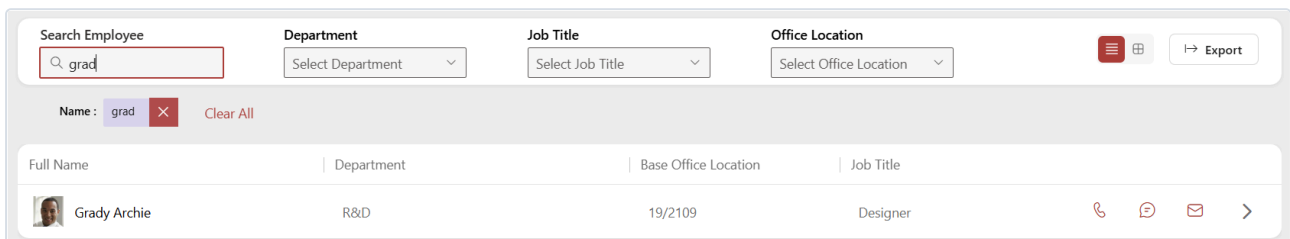


Figure 4: Search box with live results

Below the search box, one or more dropdown filters are available, for example Department, Job Title and Office Location. Which fields appear here is configurable by an administrator (see Section 12.2). Each filter supports multiple selections, and selected filters and the current search term appear as removable chips below the filter bar. Click **Clear All** to remove every applied filter and search term at once.

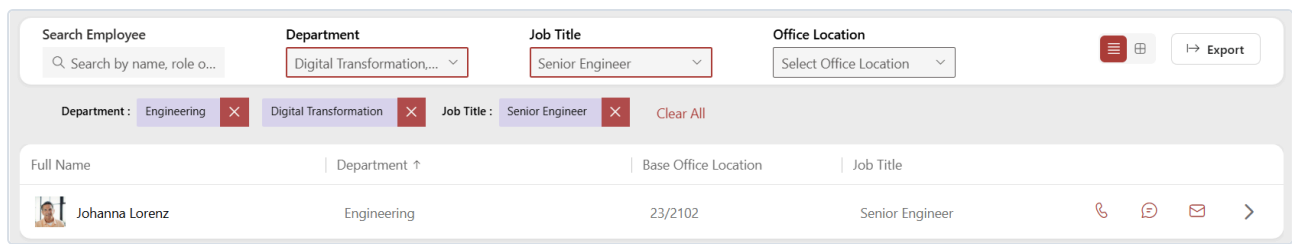


Figure 5: Applied filters shown as chips, with Clear All

9. List view and card view

Use the view toggle in the filter bar to switch between list view and card view.

List view displays employees in a sortable table. Click a column header (Name, Department, Office, Job Title) to sort ascending or descending. Each row shows quick-action icons for Mail, Call and Chat, and a chevron that opens the employee's detail panel.

Full Name	Department	Base Office Location	Job Title	
Adarsh Sharmaaaa Developer 2	Digital Transformation	BDN 4	Developer 2	Call, Chat, Mail, Chevron
Adele Vance Retail Manager	Retail Department	CLE	Retail Manager	Call, Chat, Mail, Chevron
admin01 QA Engineer	QA	BDN	QA Engineer	Call, Chat, Mail, Chevron
Grady Archie Designer	R&D	19/2109	Designer	Call, Chat, Mail, Chevron
Henrietta Mueller Developer	R&D	18/1106	Developer	Call, Chat, Mail, Chevron
Isaiah Langer Sales Rep	Sales	20/1101	Sales Rep	Call, Chat, Mail, Chevron
Johanna Lorenz Senior Engineer	Engineering	23/2102	Senior Engineer	Call, Chat, Mail, Chevron
Joni Sherman Paralegal	Legal	20/1109	Paralegal	Call, Chat, Mail, Chevron

Figure 6: Employee list view

Card view displays employees as compact cards showing avatar, name, title, department and location, with quick-action icons for Call, Teams chat and Mail.

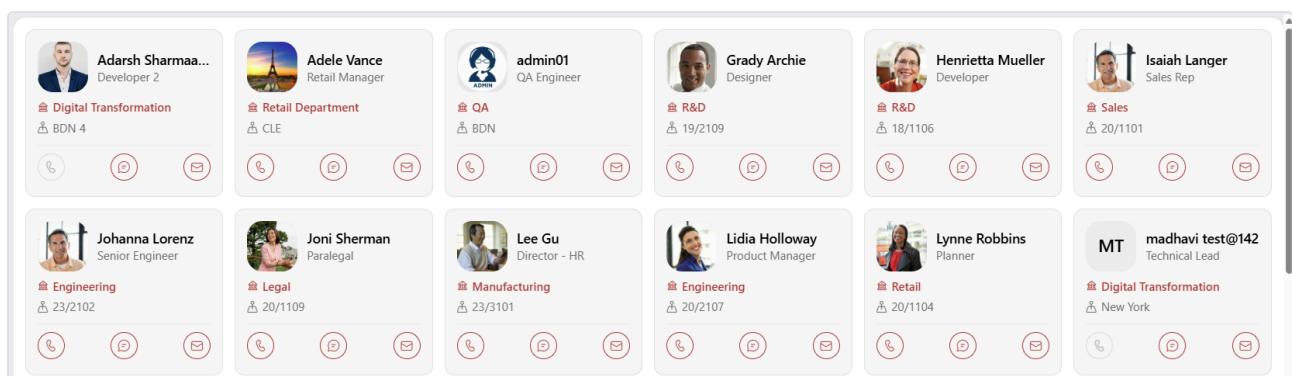


Figure 7: Employee card view

Both views load more employees as you scroll (lazy loading), and show a message when no employees match the current search or filters.

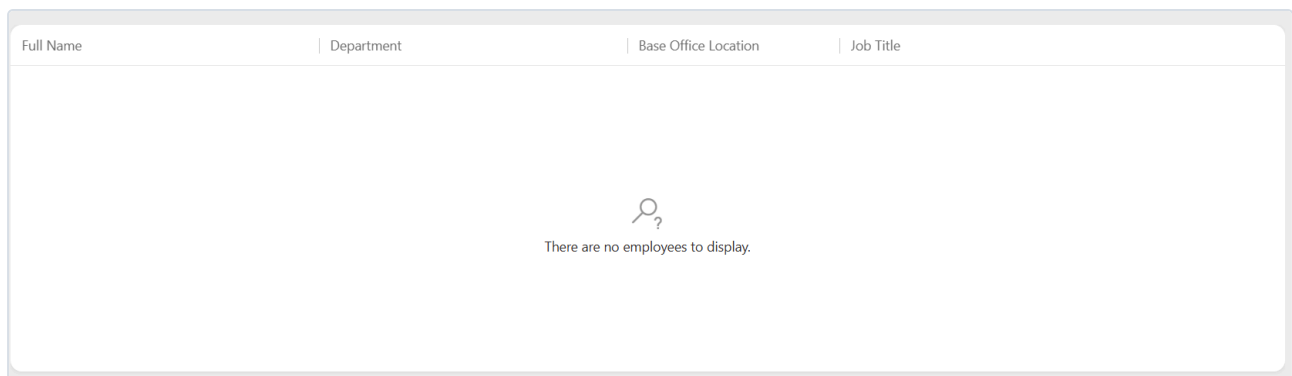


Figure 8: Message shown when no results match

10. Employee detail panel

Click any employee, or the My Profile persona, to open their details in a side panel.

- The header shows the photo (or initials), name, job title, department and location, with quick-action buttons for Call, Chat and Email.
- Work information and personal information show only the fields an administrator has chosen to display (see Section 12.3).
- The manager and up to three reportees are shown as clickable mini-avatars. Click one to jump to that person's details.
- An **Org Chart** button opens the organization chart for that employee, if configured.
- Click the close (X) icon to dismiss the panel.

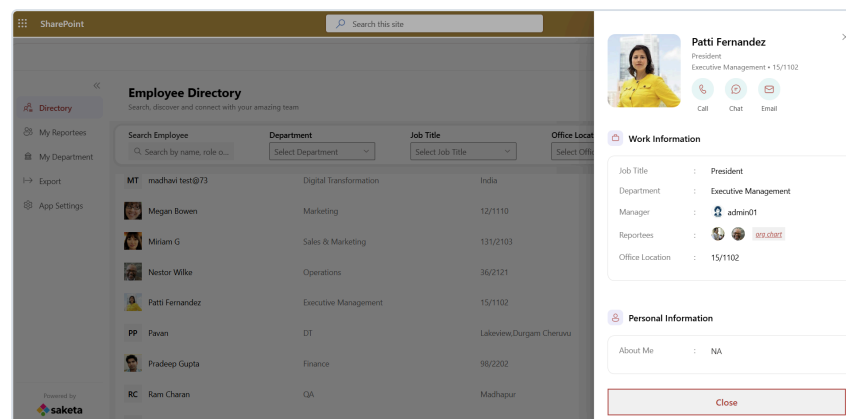


Figure 9: Employee detail panel showing the header, work and personal information

11. Export

Open **Export** from the side navigation, or use the toolbar Export button if it has been enabled for everyone.

1. Select the export format, Excel or PDF.
2. Select the fields to include from the Selected fields dropdown. PDF export supports up to six fields.

- Optionally rename a field's display label using the edit (pencil) icon, then confirm with the check mark.
- Review the live preview table at the bottom of the screen.
- Click **Export** to download the file.

displayName	jobTitle	department
Adarsh Sharmaaaaa	Developer 2	Digital Transformation
Adele Vance	Retail Manager	Retail department
admin01	QA Engineer	QA
Grady Archie	Designer	R&D
Henrietta Mueller	Developer	R&D
Isaiah Langer	Sales Rep	Sales
Johanna Lorenz	Senior Engineer	Engineering
Joni Sherman	Paralegal	Legal
Lee Gu	Director - HR	Manufacturing
Lidia Holloway	Product Manager	Engineering
Lynne Robbins	Planner	Retail
madhavi test@142	Technical Lead	Digital Transformation

Figure 10: Export screen showing format, field selection and preview

NOTE

Whether the Export option is visible to all users or to administrators only is controlled in App Settings. See Section 12.4.

Exporting a filtered result set

Apply any search term or filters on Directory first, so the list narrows to the matching employees, then click Export. The export screen carries the active filters over automatically, and the preview table shows only the filtered records. Field selection and the Excel or PDF choice work exactly as for a full export. To export the whole directory again, clear the filters first.

12. App Settings (administrators)

Administrators can click **App Settings** in the side navigation to open the configuration panel. It has four tabs: Visual Customization, ED Filters, User Profile and App Settings.

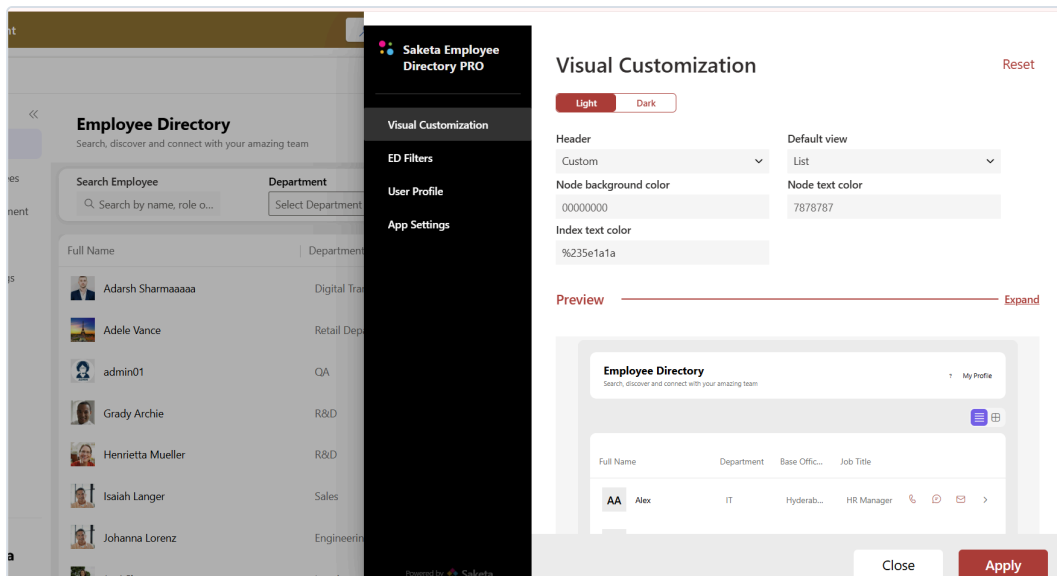


Figure 11: App Settings panel with the left tab navigation

12.1 Visual Customization

Controls the look and feel of the app. The live preview uses the same list and card components as the directory itself, so it shows what users will see.

- **Theme:** switch between light and dark.
- **Header:** Default, or Custom with Node background colour and Node text colour pickers.
- **Default view:** list or card.
- **Preview panel:** shows your changes live. Click Expand for a full-screen preview.

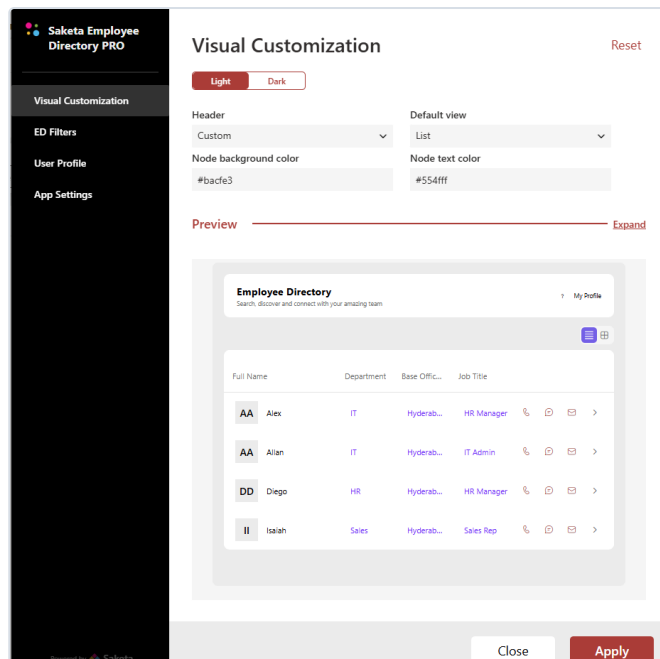


Figure 12: Visual Customization tab with live preview

12.2 ED Filters

The **Configuration** sub-tab sets which employee profile fields, for example Job Title, Department, Base Office Location or Skills, populate the filter dropdowns on the home page. A maximum of four fields can be selected at a time; remove one before adding another.

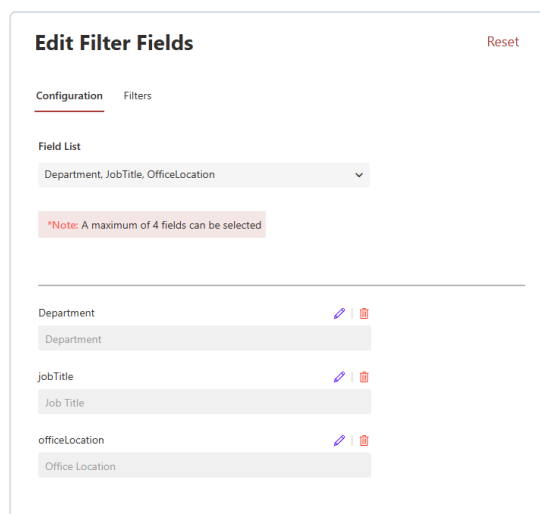


Figure 13: The Configuration sub-tab of ED Filters

The **Filters** sub-tab controls which employees appear at all:

- **Exclude External Accounts** (Yes/No) excludes accounts that are not part of the organization.
- **Exclude Filter by AD Attribute** hides employees matching a given attribute and value, for example First Name = John.
- **Include Filter by AD Attribute** restricts the directory to only employees matching a given attribute, value or domain.

Use **Reset** to restore the saved defaults, or **Apply** to save changes and reload the directory.

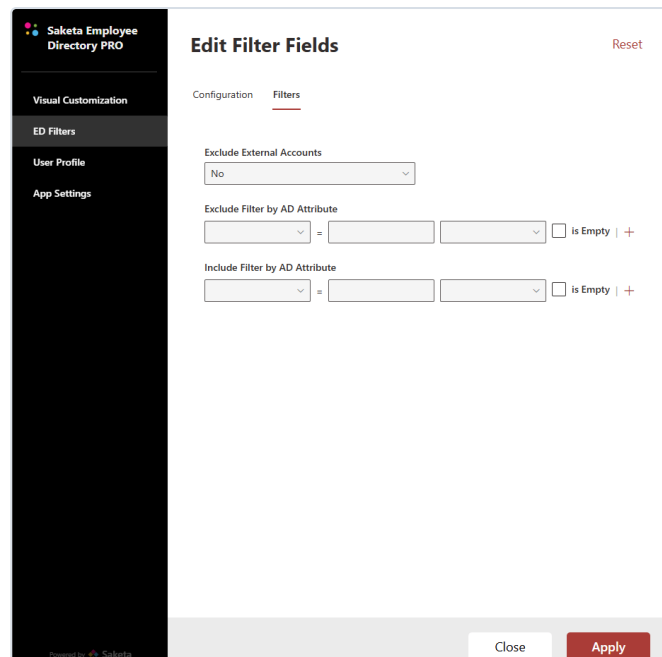


Figure 14: The Filters sub-tab of ED Filters, with exclude and include conditions

12.3 User Profile

Sets which work information and personal information fields are shown in the employee detail panel (Section 10). Pick the Default set or build a Custom set.

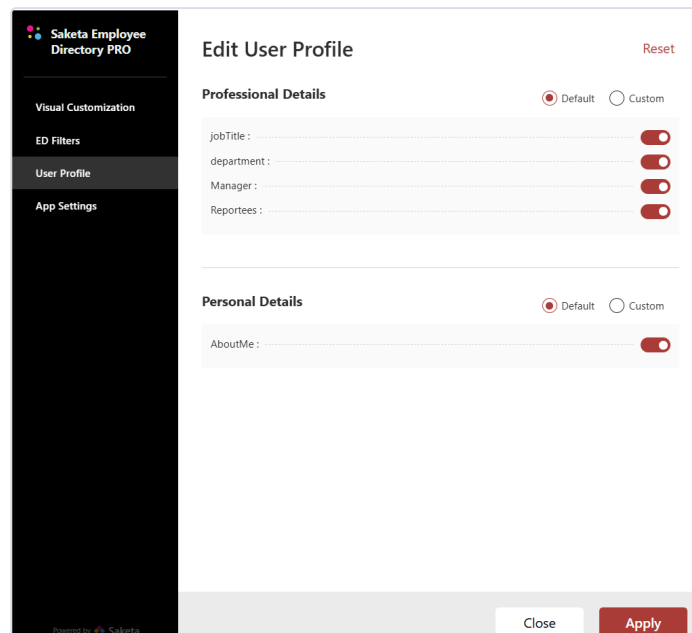


Figure 15: Selecting work and personal information fields on the User Profile tab

12.4 App Settings

- **Title and Slogan:** the text shown in the welcome banner.
- **Export access:** administrators only, or everyone.
- **Layout:** Default, or Full screen.

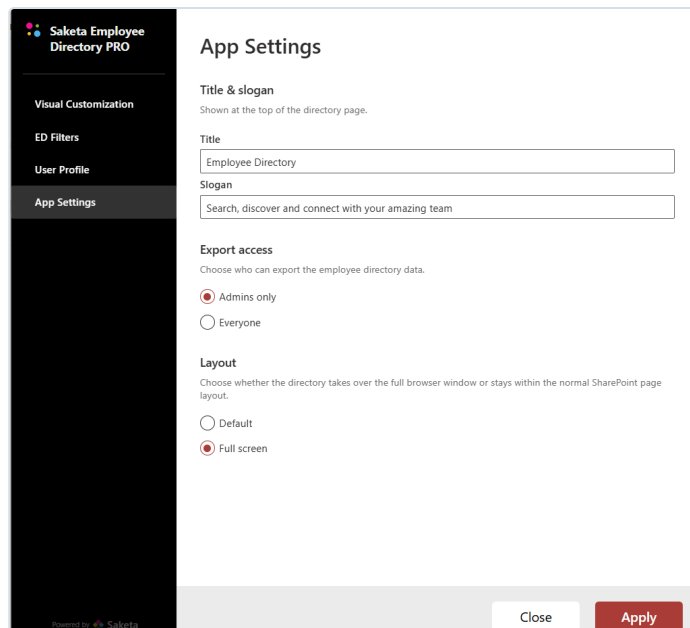


Figure 16: The App Settings tab, with title, slogan, export access and layout

13. Mesh (Pro feature)

For organizations on the Pro licence, an additional **Mesh** overlay is available on your own profile panel. It adds an icon menu for quick access to My Details, Calendar, Groups, Insights, Teams, People, Mail, To-Do, OneDrive and OneNote, powered by Microsoft Graph.

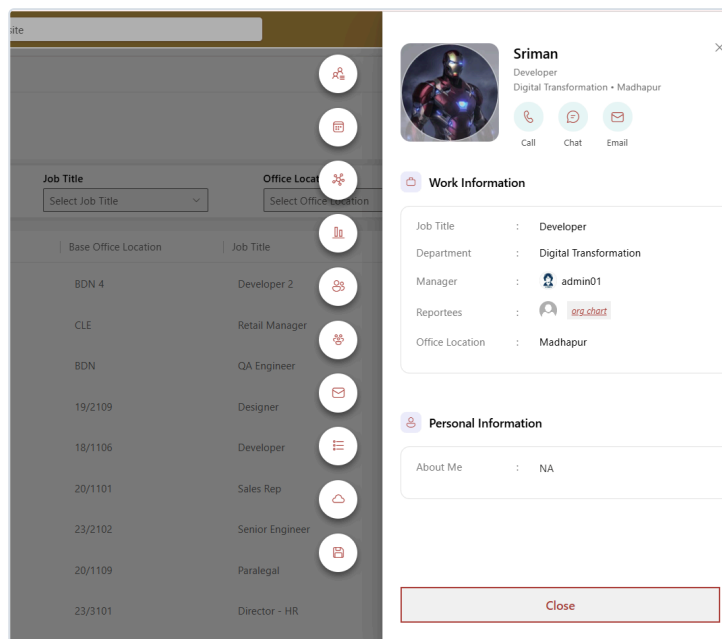


Figure 17: Mesh overlay icon menu on the profile panel

NOTE

Mesh is available only on the Pro-licensed build. If your organization is not on Pro, this menu does not appear. Mesh depends on Microsoft Graph permissions that a tenant administrator must approve. Where a permission has not been approved, the matching Mesh tile is unavailable and the rest of the directory is unaffected.

14. Support

Support email	support@saketa.com
Knowledge base and FAQ	https://helpdesk.saketa.com/
Contact form	https://saketa.com/contact-us/
Privacy policy	https://saketa.com/privacy-policy/

Support channels, availability and escalation are described in the *Support Document*.