University of Victoria

Information at your fingertips!

Directory Administration

How to Update your Department Summary Listing

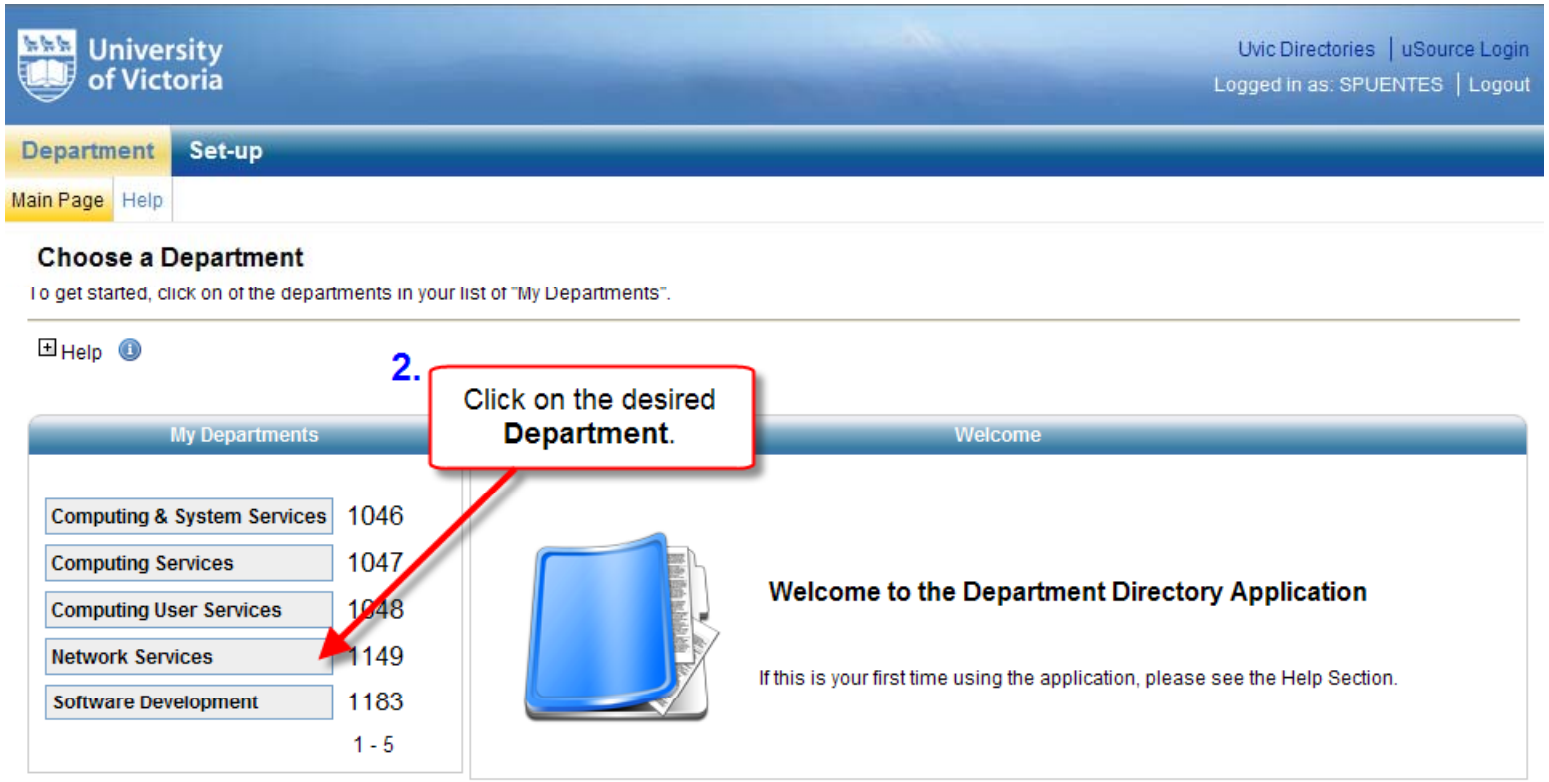
You may pause this tutorial by clicking the pause and resume buttons. You may also click the track buttons to advance forward and backward.

To access the University of Victoria's Directory Administration system you must have appropriate access. If you are the administrator for your department's directory and you do not have access, please contact the Computer Help Desk at helpdesk@uvic.ca.

1. Enter your **NetLink ID** and **password** in the fields provided.

Here you will see a list of the departments for which you have access.

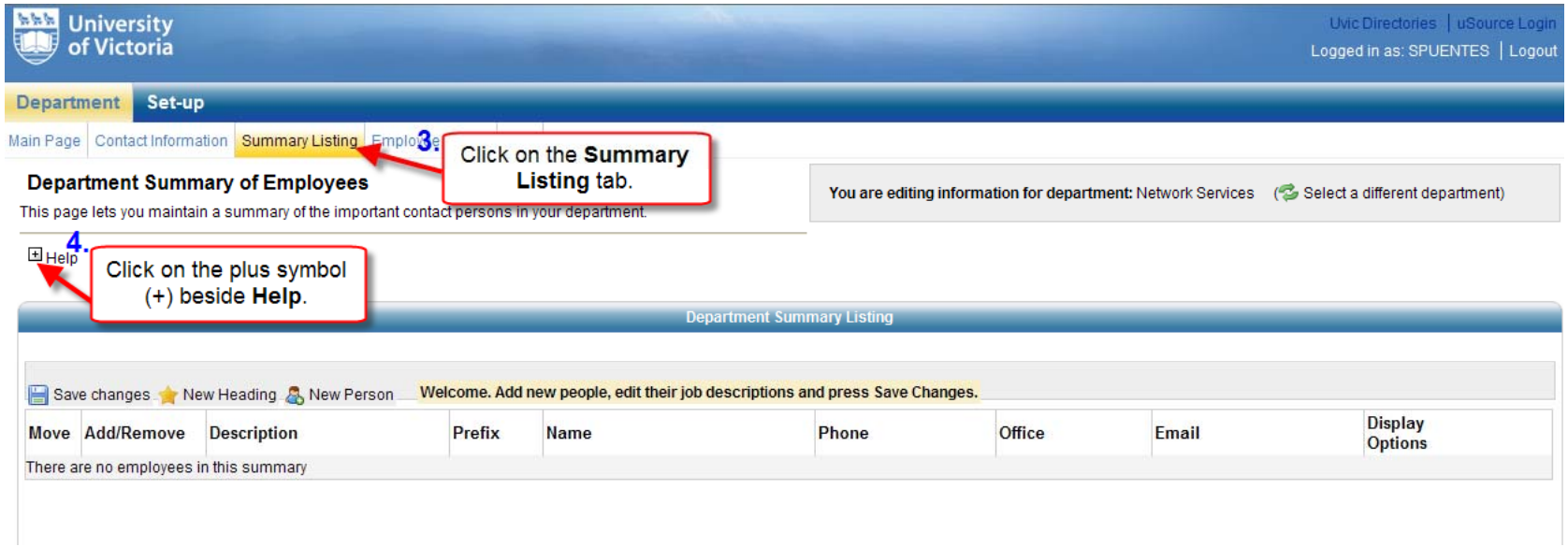
2. Click on the **Department** you wish to view.



3. Click on the **Summary Listing** tab.

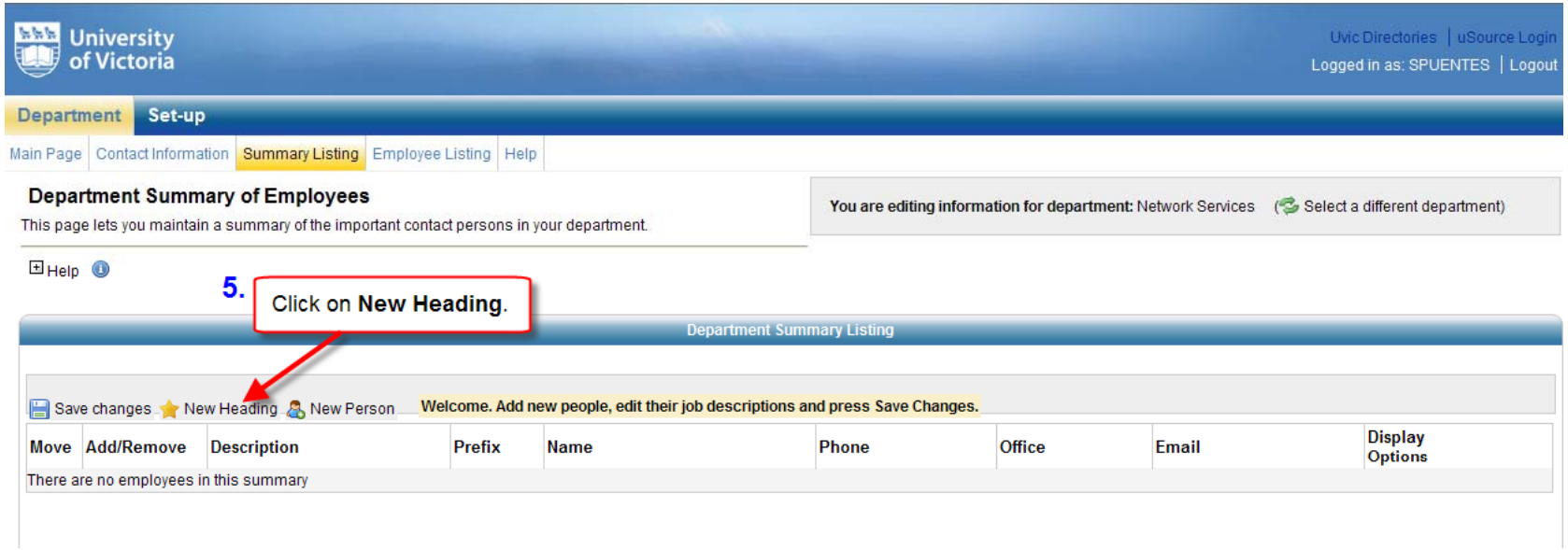
   This page allows you to view and maintain a summary of the important contact people in your department.

4. Before you proceed with this tutorial, click on the plus (+) symbol beside **Help** to acquaint yourself with the many icons and functions you will encounter. For your convenience, a copy of the Help information has been appended to the end of this tutorial.



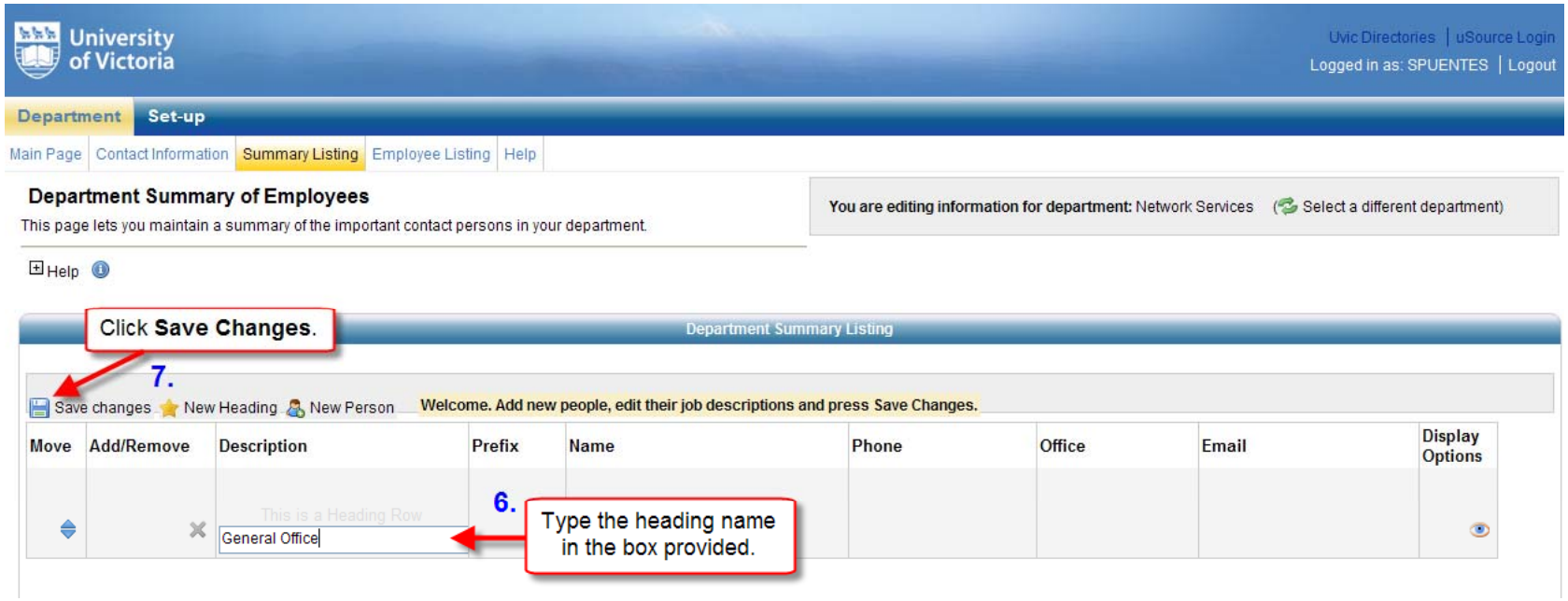
For your summary listing, you may wish to create headings to separate the various units within your department.

5. Click on **New Heading**.



You will see that a heading row has been created.

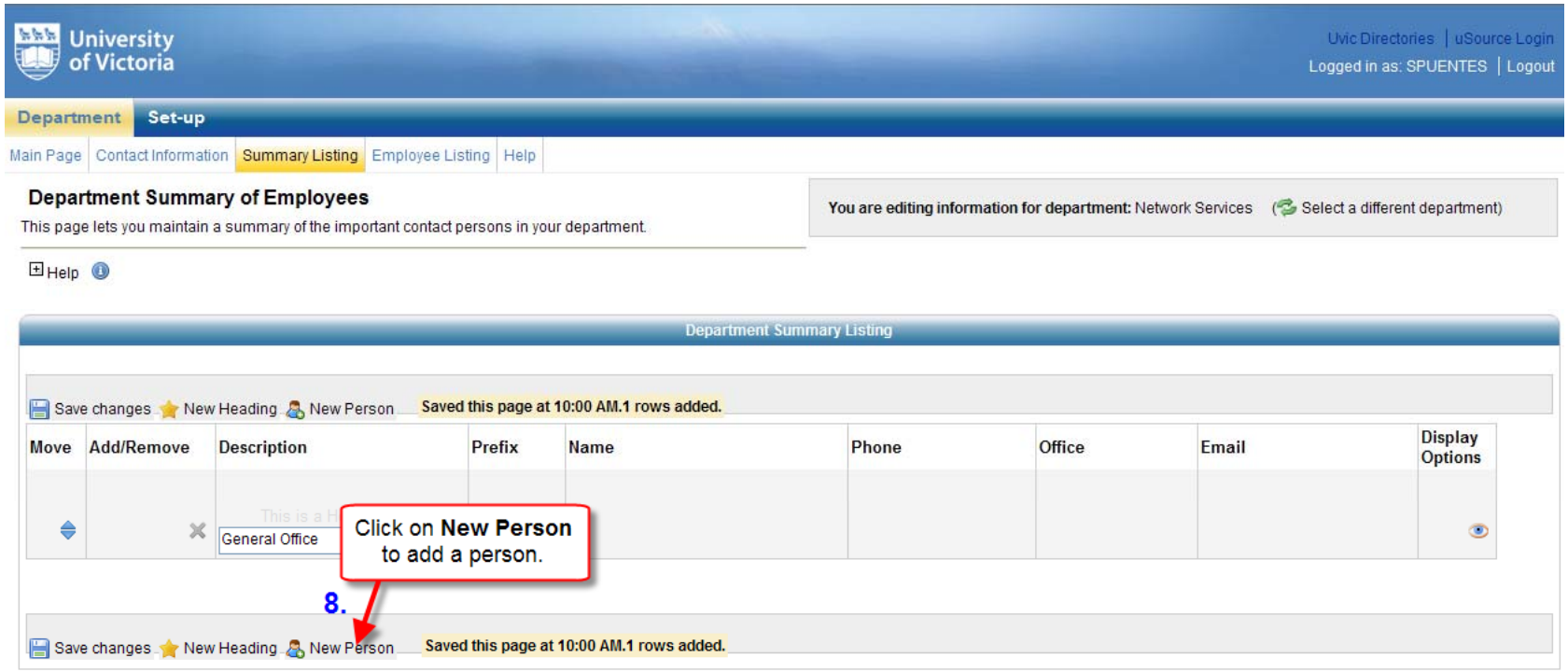
6. In the Description column, type the heading name in the box provided.
7. Then click **Save Changes**.



<u>Note</u>: It is important to remember to click **Save Changes** every time you make a change, otherwise your changes will not be saved.

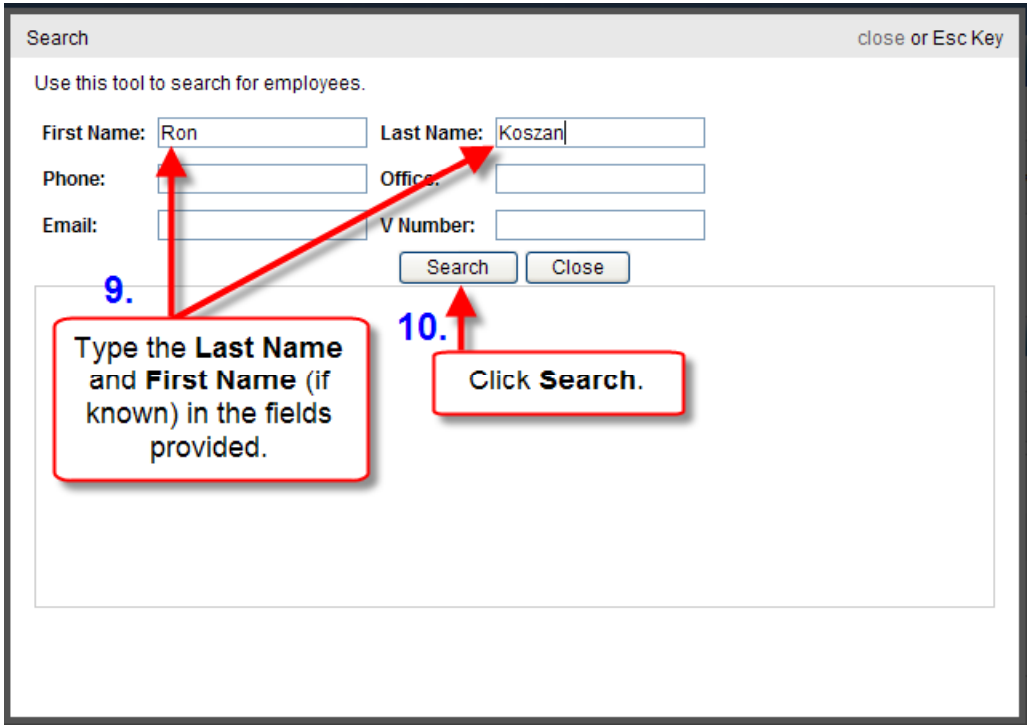
You will see that a your changes have been accepted.

8. To add a person under the heading you just created, click on **New Person** at the bottom of your screen. This will open the **Search** window.



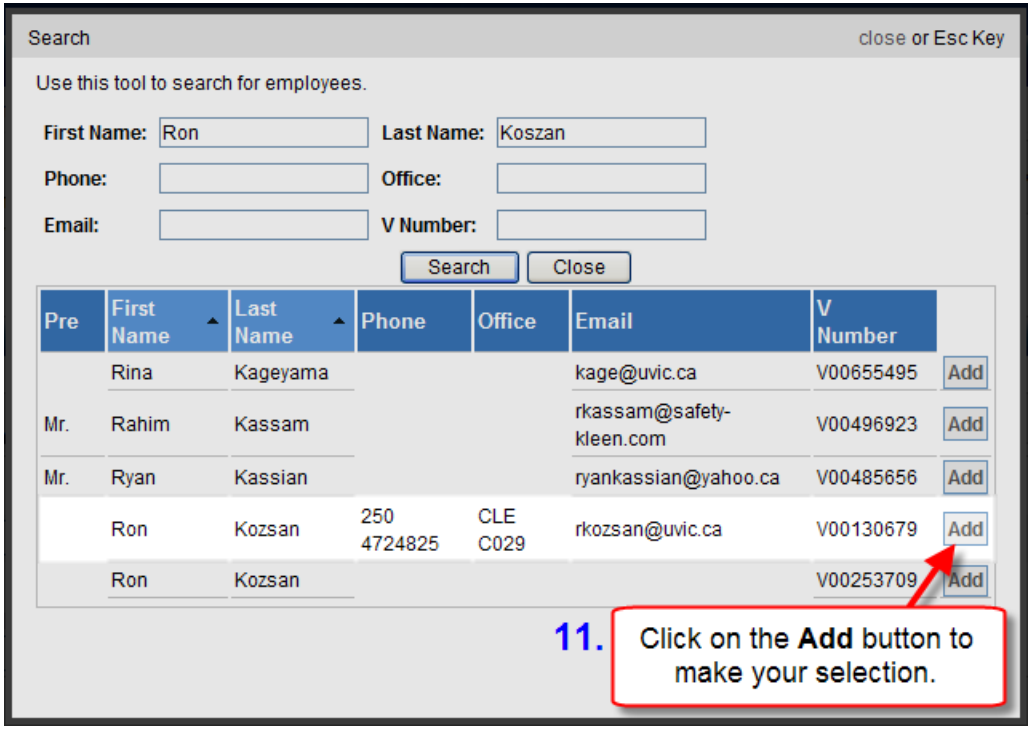
9. Type the **Last Name** and **First Name** (if known) in the fields provided.

10. When you are finished, click on **Search**.



A list of employees with names matching or similar to the name(s) you requested will be retrieved.

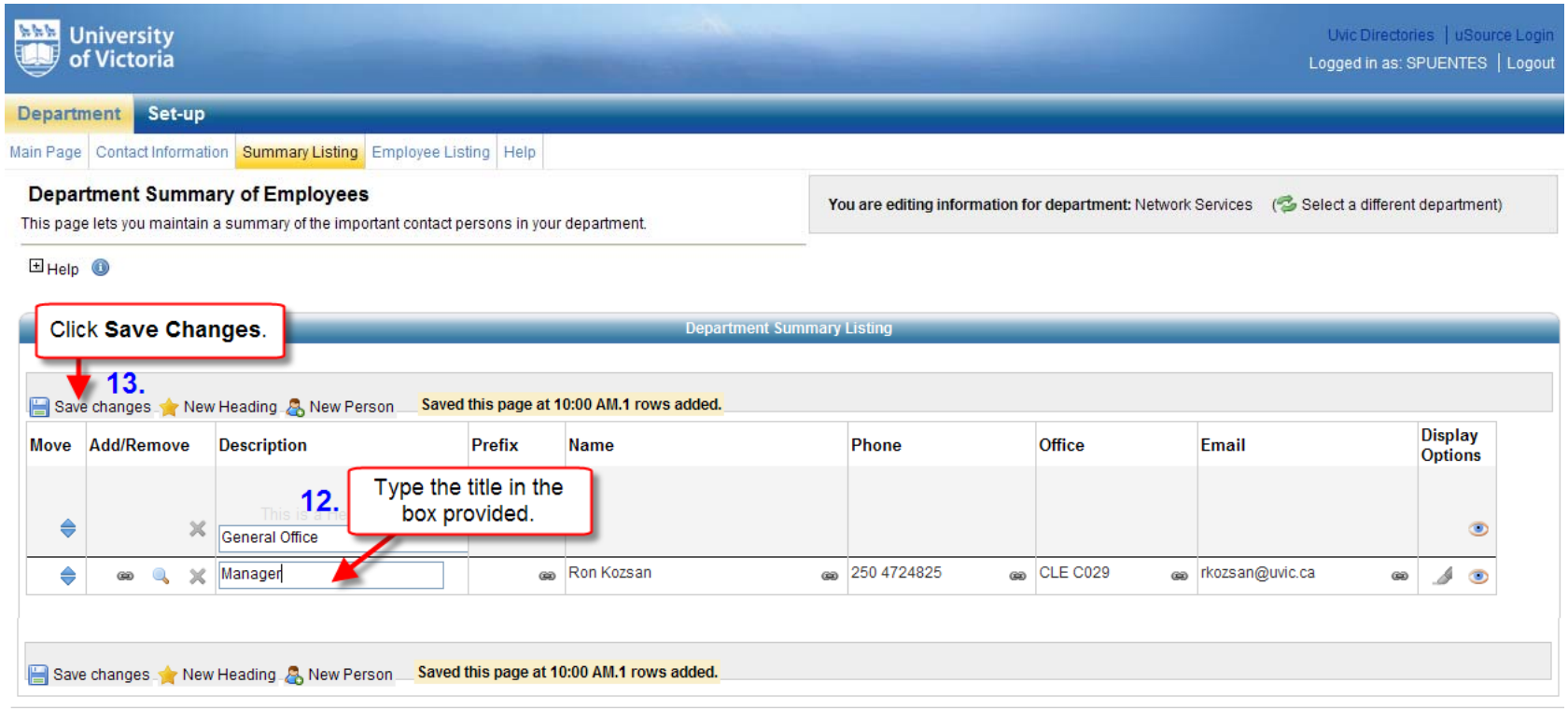
11. Click on the **Add** button next to the person you wish to add.



You will see that the person you selected has been added. At this point you have several options available to you. First we will add a title under **Description**.

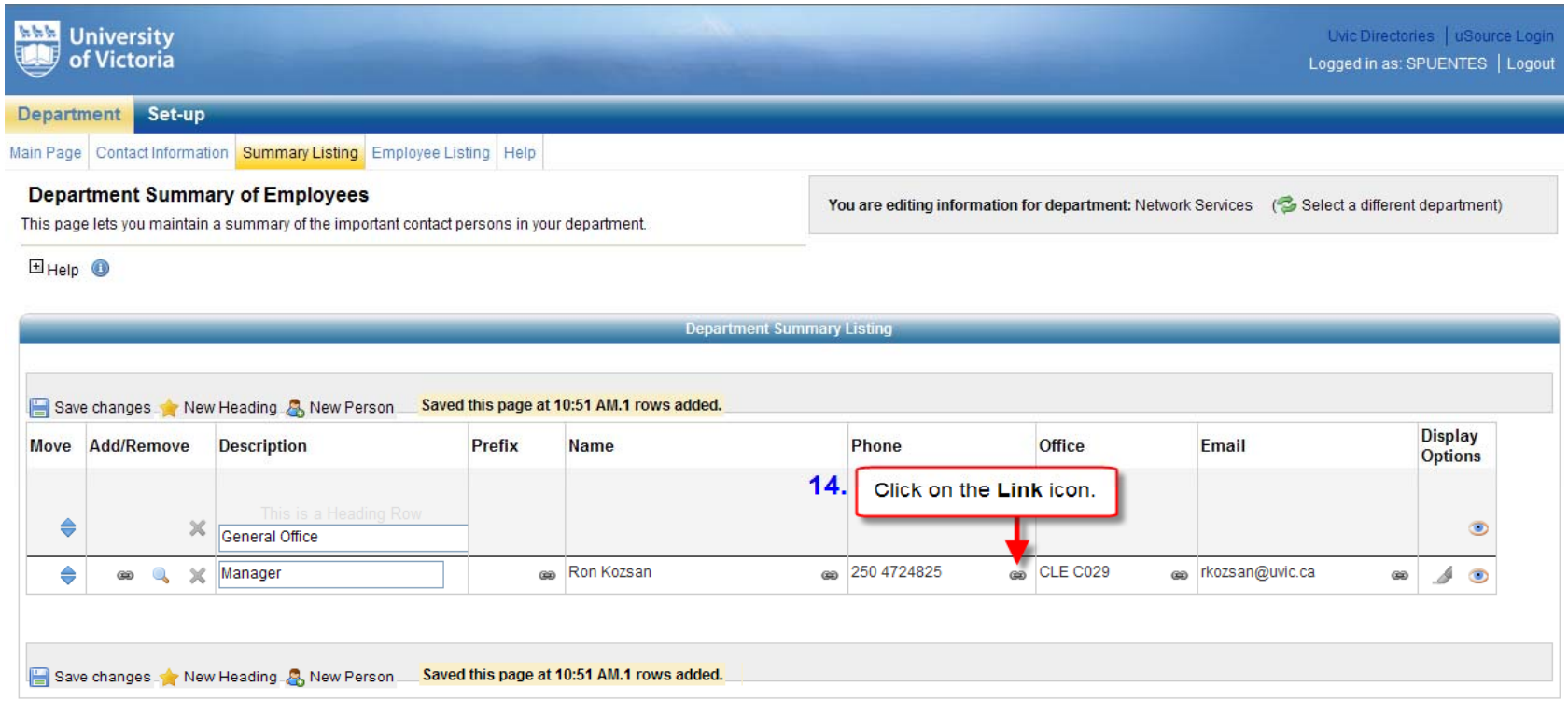
12. Type the person's title in the box provided.

13. When you are finished, click **Save Changes**.



When you added the person to your summary listing, the data was retrieved from Banner. To make changes to fields such as Phone, Office or Email, you must first unlink the person's data. This will then open the fields for editing.

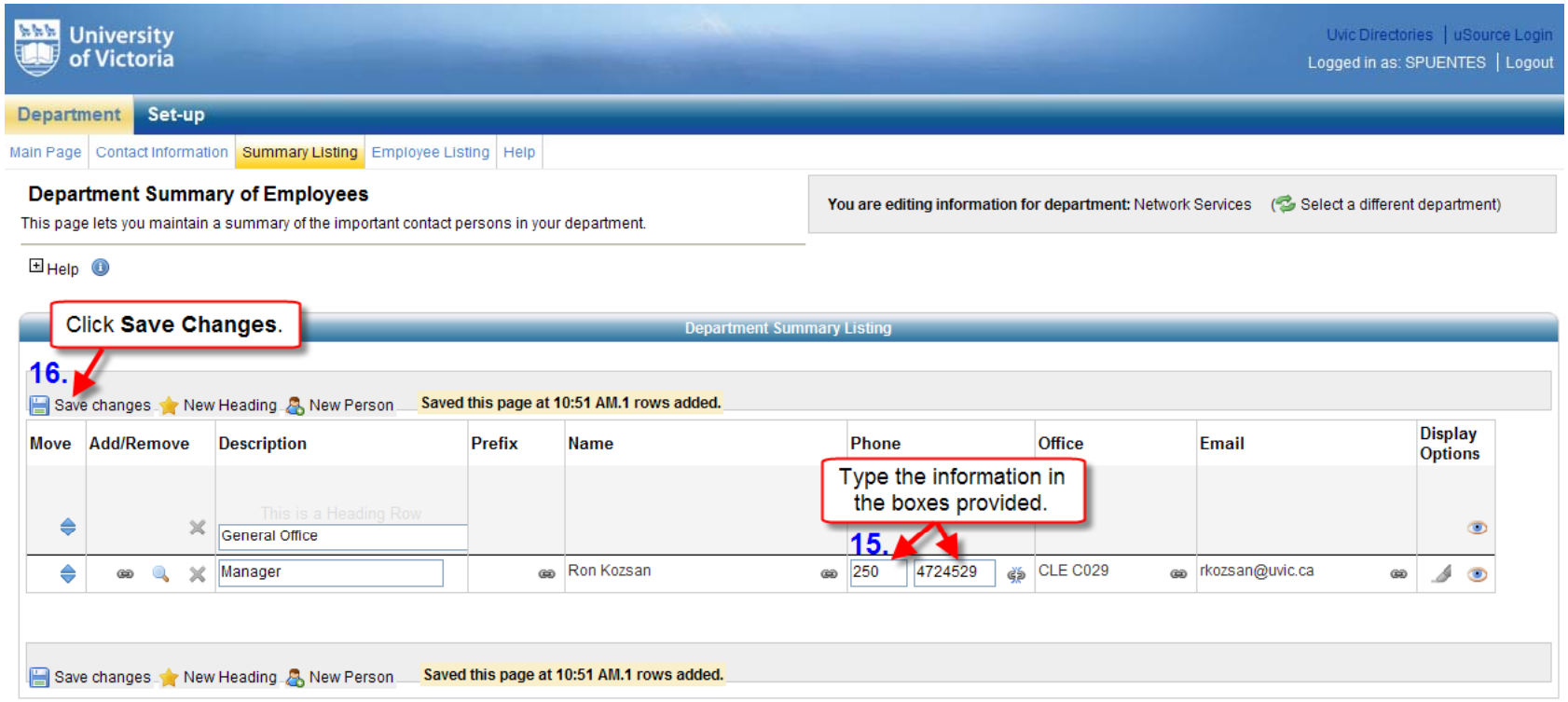
14. Click on the **Link** icon in the corresponding column.



You will see that the link to Banner is now broken and the field is available for editing.

15. Type the information in the boxes provided.

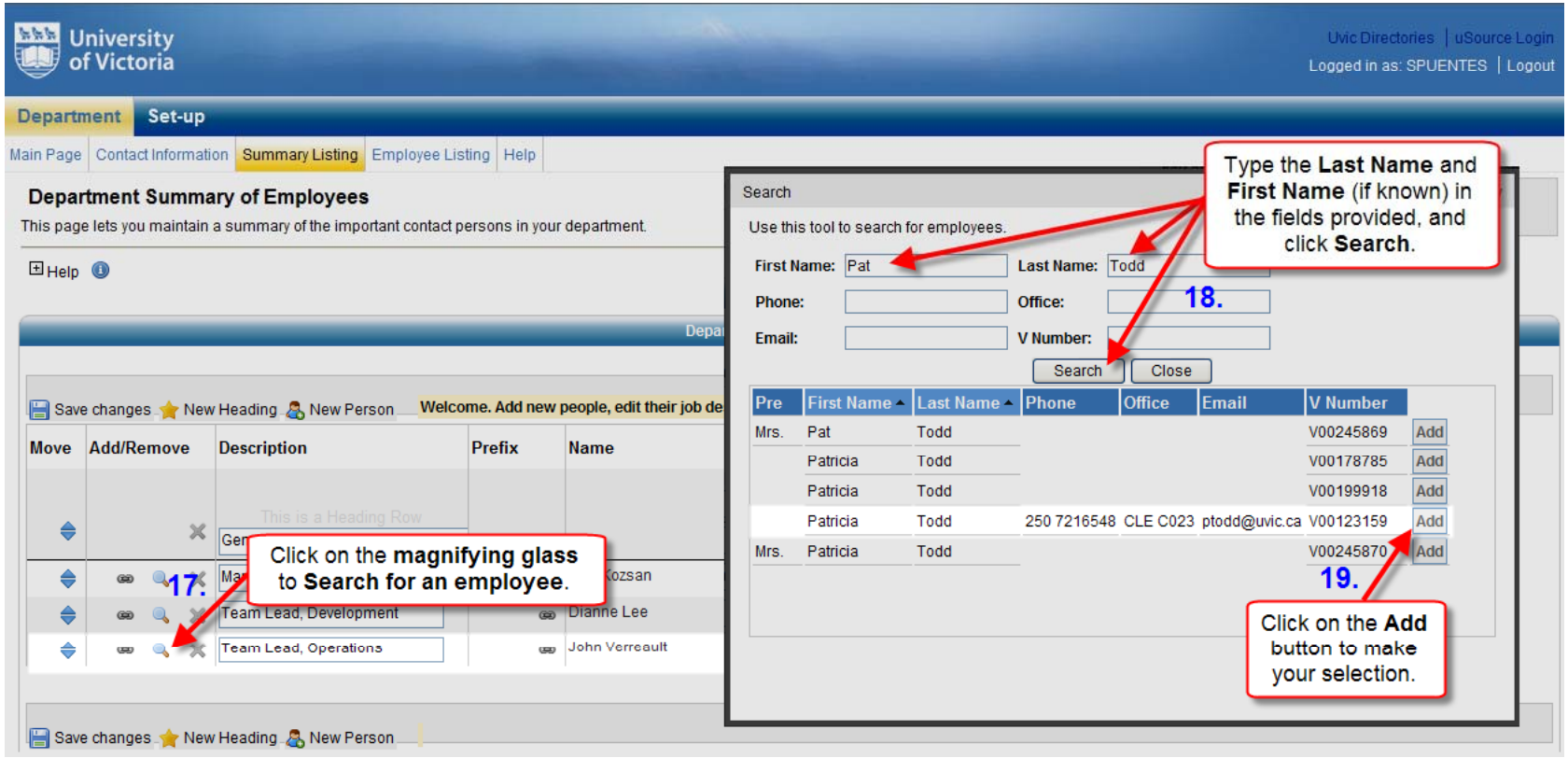
16. When you are finished, click **Save Changes**.



Note: Telephone numbers must be entered with no hyphen.

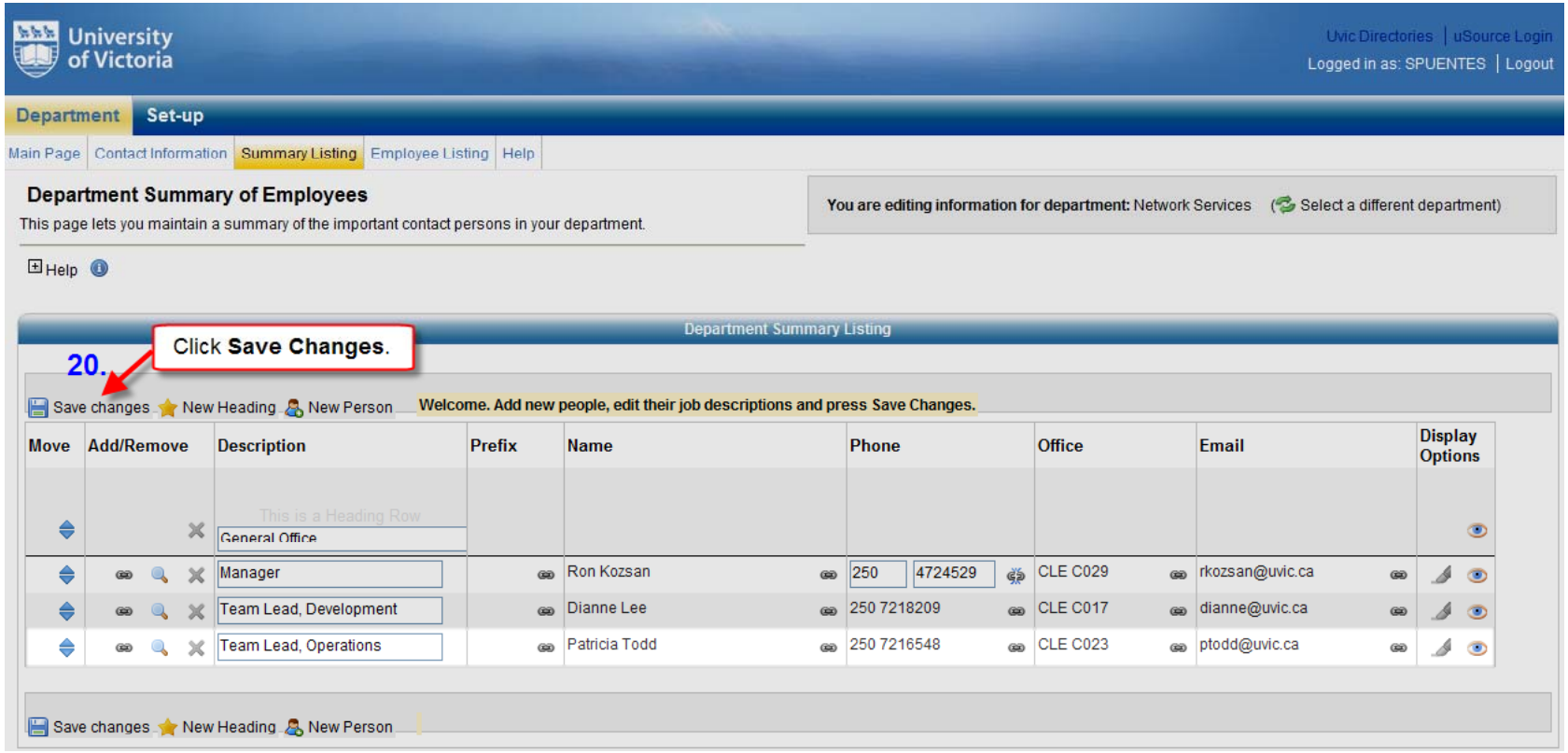
If you are replacing a staff member, you can quickly search and replace their information by using the **search for an employee** function.

17. Click on the **magnifying glass** icon in the corresponding row. This will open the **Search** window.
18. Type the **Last Name** and **First Name** (if known) in the fields provided and click **Search**.
19. Then click on the **Add** button to make your selection.

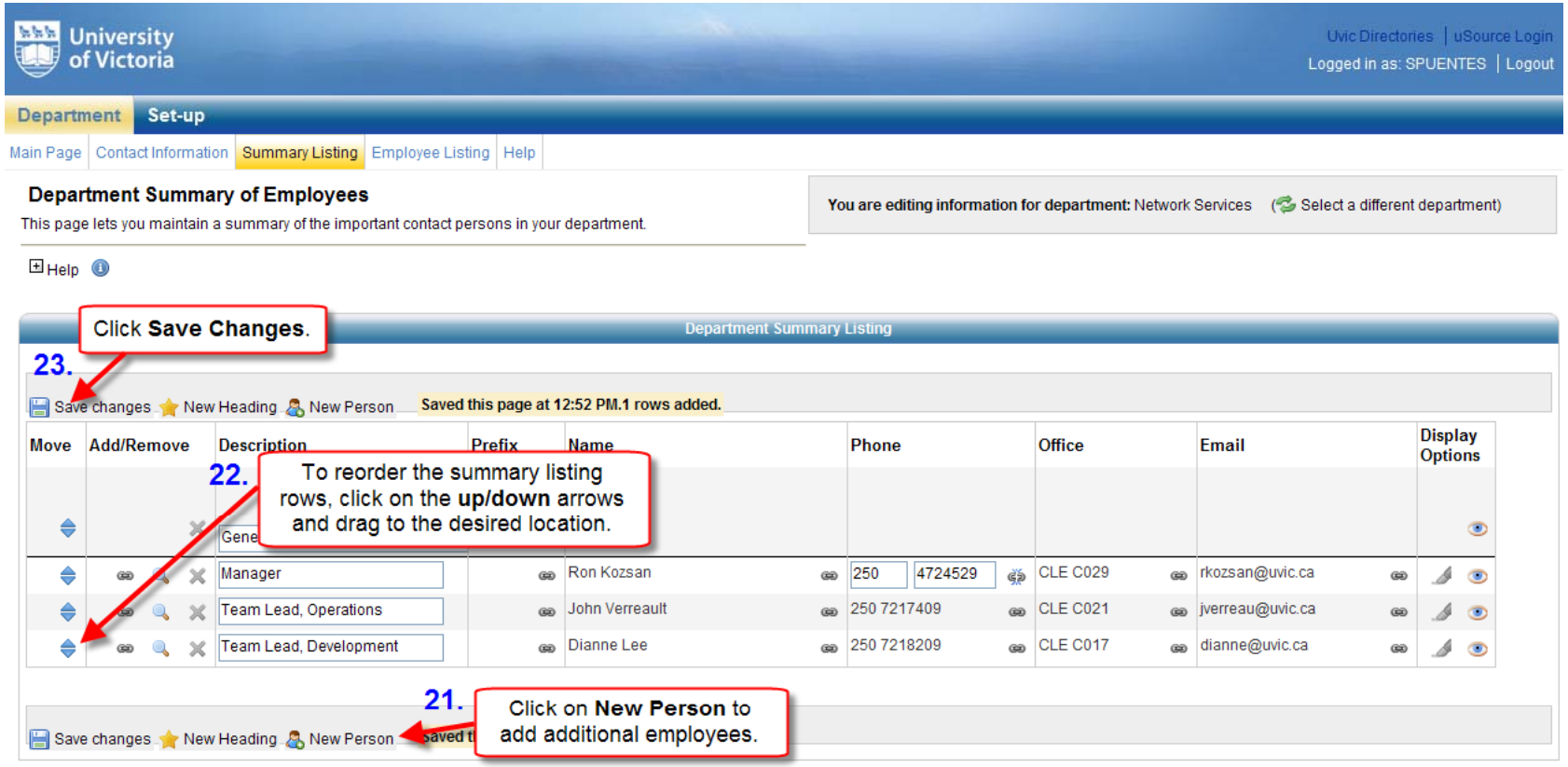


You will see that the employee has been replaced.

20. Click **Save Changes**.

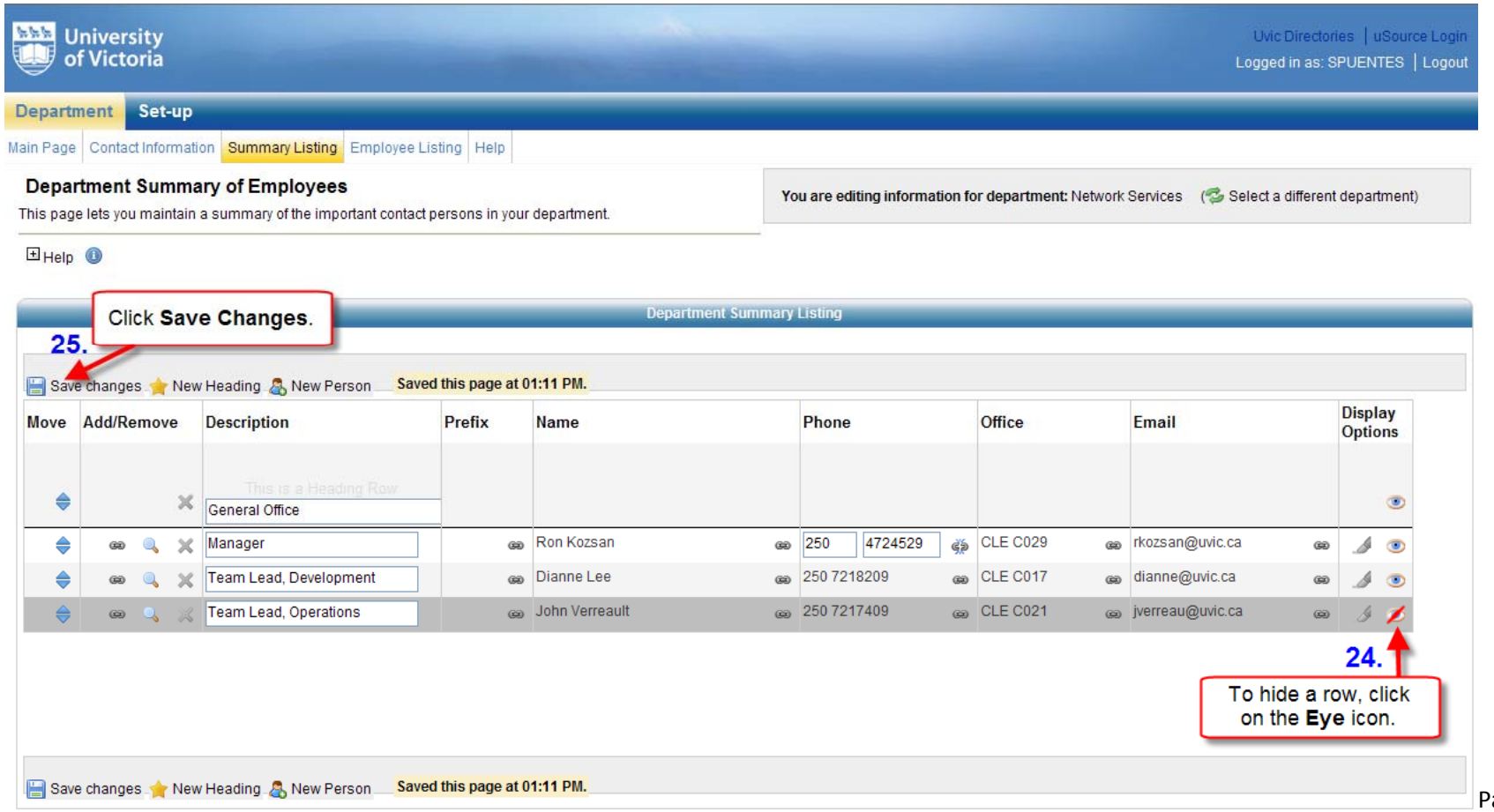


21. To add additional employees, click on **New Person** at the bottom of the screen and repeat steps 8 to 13.
22. If you need to reorder the rows in your summary listing, click on the **up/down** arrows and drag the row to the desired location. Let go when you have the correct placement.
23. Remember to click **Save Changes** when you are finished.



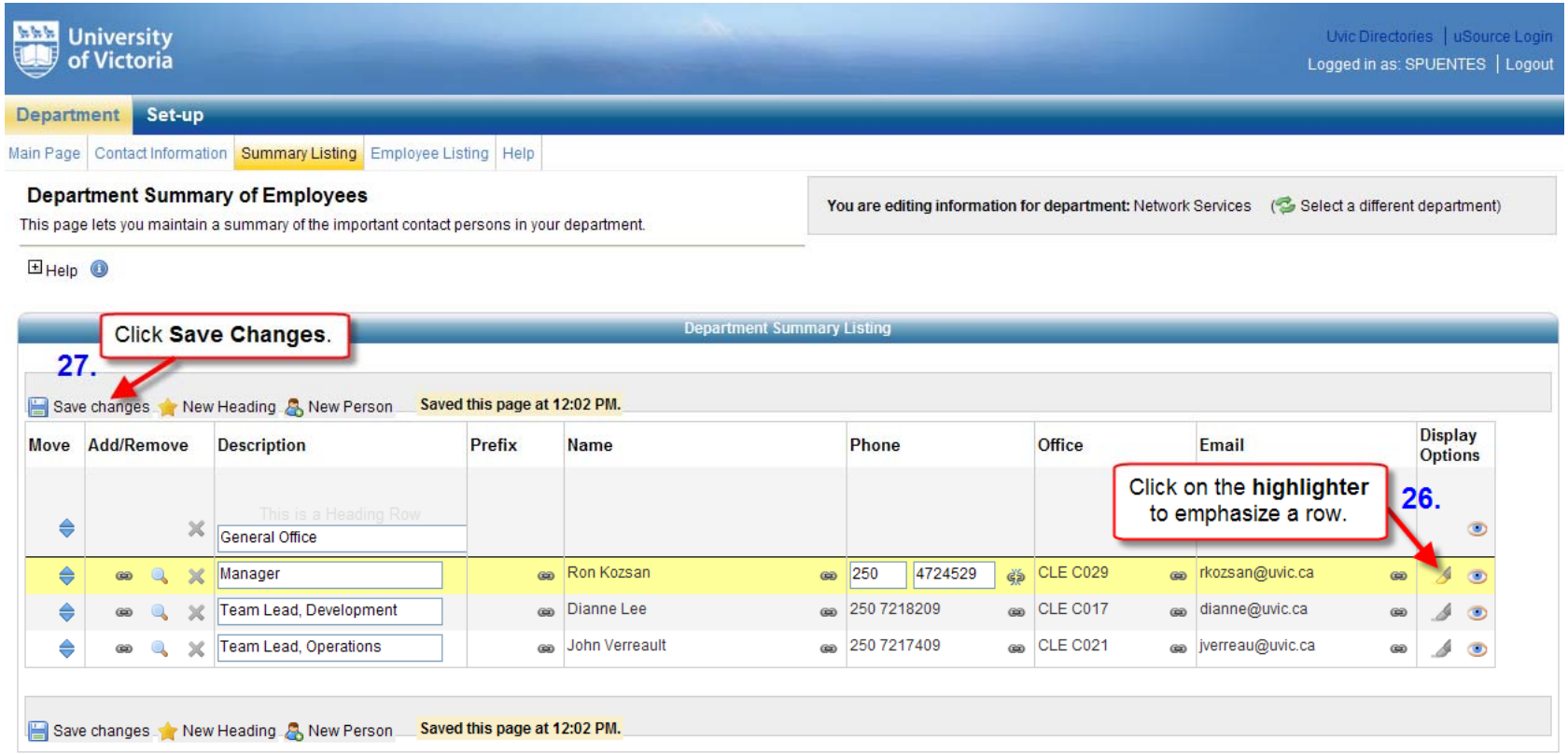
You will see that the rows have moved.

24. To hide a row, click on the **Show/Hide** icon under **Display Options**.
25. Then click **Save Changes**.

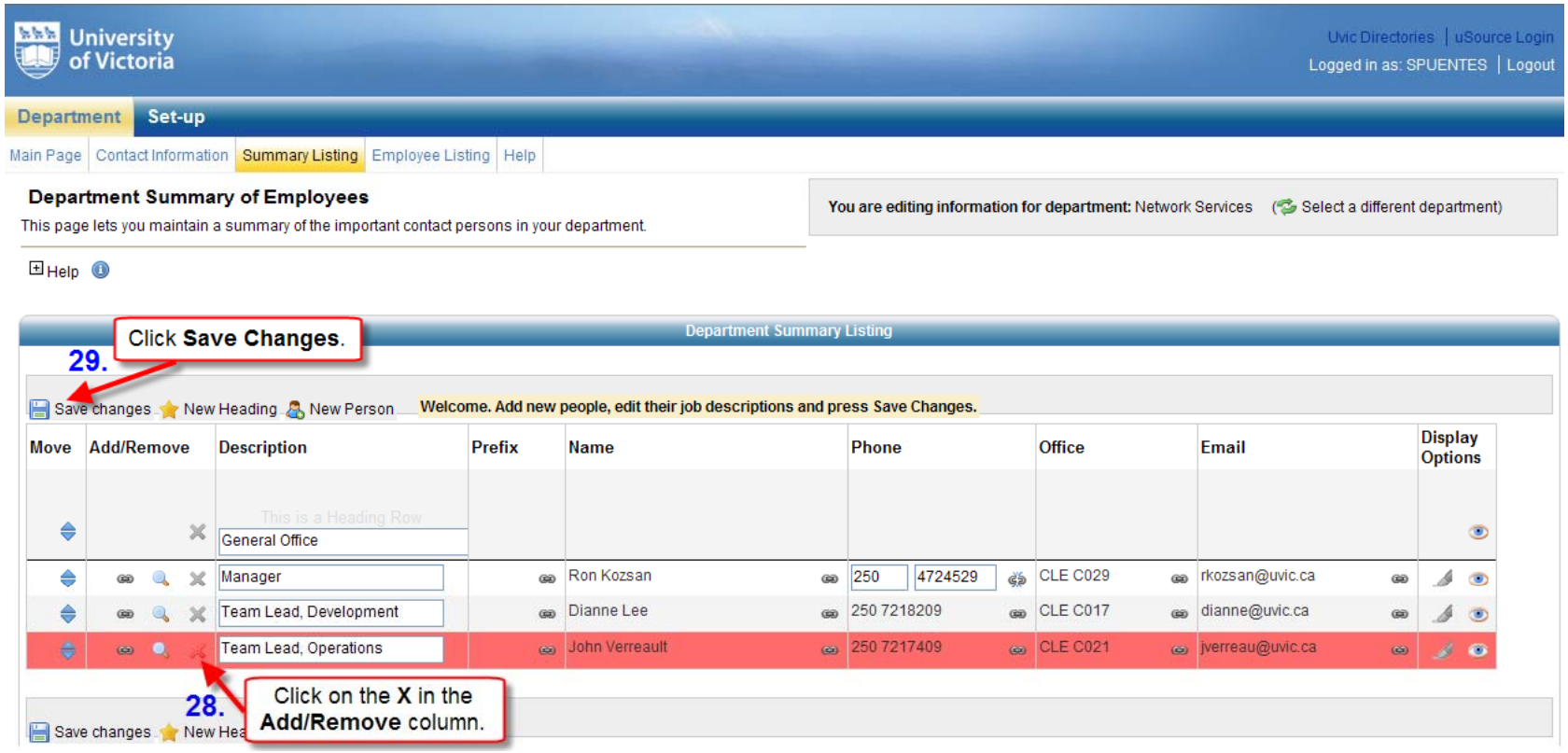


For various reasons, you may wish to **emphasize a row**. This will duplicate the person's key information (**Description** and **Phone** only) above your department's summary listing for easy access. Their full information will remain in the summary.

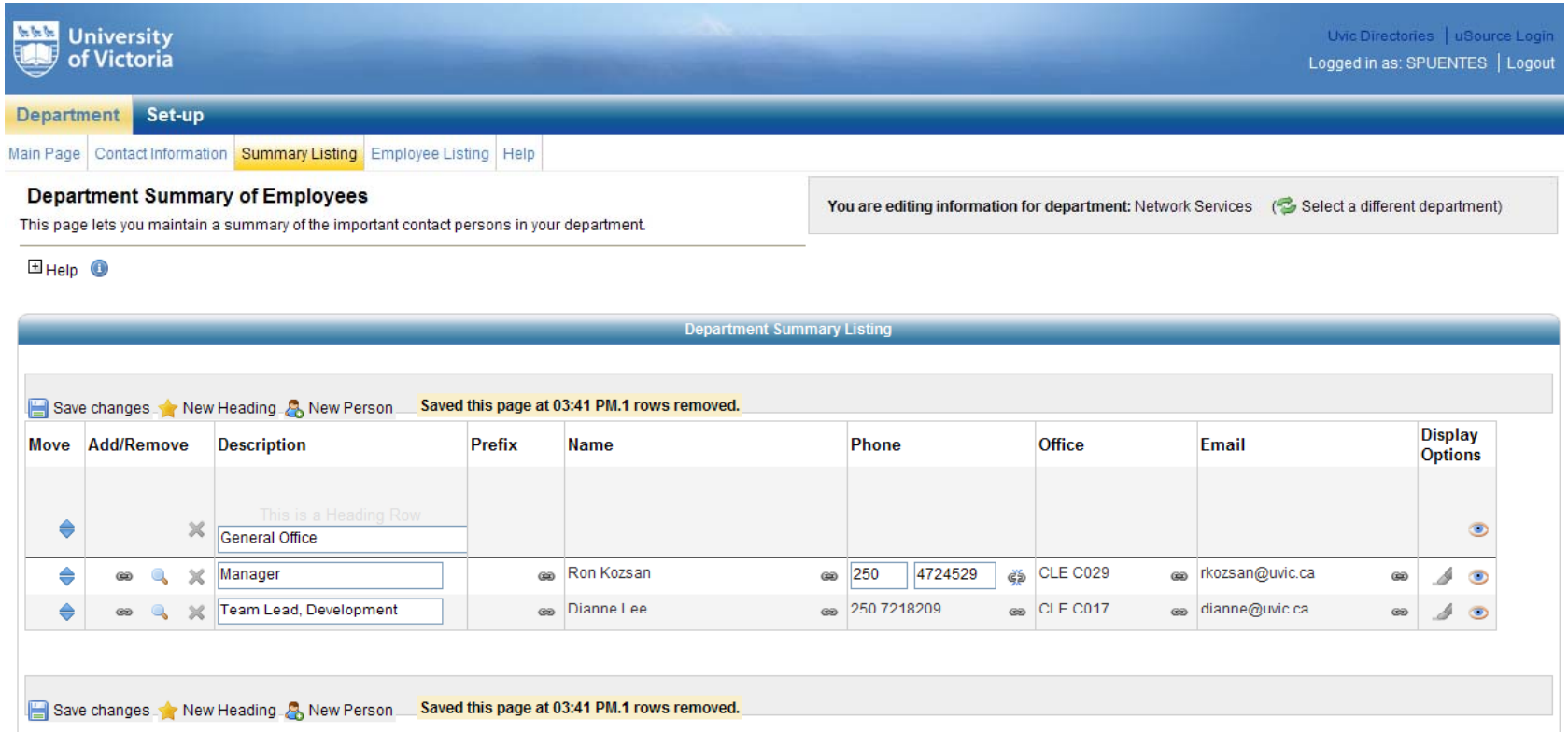
26. To emphasize a row, click on the **highlighter** icon under **Display Options** in the corresponding row.
27. Then click **Save Changes**.



28. To delete a row click on the **X** in the **Add/Remove** column to highlight the corresponding row.
29. Then click **Save Changes**.



You will see that the row has been deleted.



A copy of the Summary Listing's **Help** information is attached for your convenience.

University of Victoria

Uvic Directories | uSource Login
Logged in as: SPUENTES | Logout

Department Set-up

Main Page | Contact Information | Summary Listing | Employee Listing | Help

Department Summary of Employees

This page lets you maintain a summary of the important contact persons in your department.

You are editing information for department: Network Services (Select a different department)

Help

Button	Action
	Move a row up or down.
/	Link or unlink an employee's Banner information.
	Search for someone's Banner information.
/	Flag or unflag this row for deletion. You need to save to complete the delete.
/	Highlight or unhighlight this row.
/	Show or hide this row.

This page lets you edit your summary listing

Your summary listing is a short list of the important contact people in your department. Please note that this is different from your employee listing which includes every employee in your department

Add people

To add a new person to your summary:

1. Click on "New Person"
2. Search for the person you want to add and choose them from the search results
3. Drag the new row up or down to the place you want to put it

To view other related tutorials on UVic's Directory Administration, please visit http://helpdesk.uvic.ca/uvicdir/info.html.