

T4 v8 STAFF PROFILES

Training

Updated 16 December 2020

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Staff Profile (Content type)

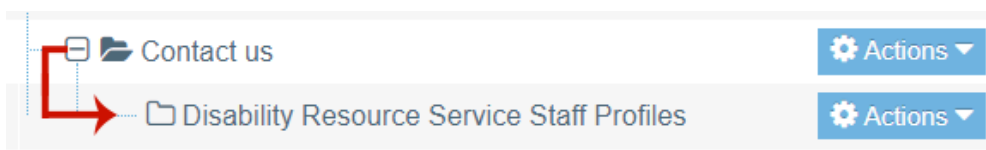
The **Staff Profile** content type is used to create **Staff Profiles** on the People or Contact us pages. Information for **Staff Profiles** are imported from other systems and are created automatically. Some are editable by department in T4 after import (Name, Position titles, Profile Image), others need to be updated from source (AD or SPARK).

Each site in T4 has its **own Staff Profile** section (where all your department staff profiles are kept), this section can be found inside the **Contact us** section. The individual Staff Profiles are added to T4 by Moderators or Contributors.

Add Staff Profiles to your site (for a person who is a UC staff member)

In order to add a UC staff to your site, you need the person's username (can be searched in Outlook) **OR** Employee ID (can be found on the staff ID card).

1. Locate the **Contact us** section within your site and look for the **Staff Profiles** section for your department/college, for example, Disability Resource Service Staff Profiles.



Please note some department sites have their staff profiles in the college level so if you do not see a staff profiles folder inside your site, look in the contact us section for your College.

2. From the **'Actions' Dropdown menu** beside this section, select **'Create Content'**
3. Select the **'Staff Profile'** content type
4. Enter the staff name in the **Name*** field (eg, Aron Car). This field helps identify your content in T4 and does not display on the web.
5. Enter **Staff Username** (eg, abc13) **OR Employee ID** (eg, 12345) - you only need one or the other, not both.
6. Click **'Save changes'** to save or **'Save and Approve'** to publish
7. Check your email for a notification that the profile has been imported to T4. This will take 30 seconds or less.
8. Locate the newly created Staff Profile. You can now Edit the profile and make any necessary changes. **Name, Position Titles, and Profile Image are now editable in T4** as detailed below:

- a. **Default Staff Name** and **Default Position Title** come from HR People Soft and are automatically pulled to T4 to display on the web. This can be changed if you have a preferred name or preferred position title that you want to use. To change the **Default Staff Name** or **Default Position Title**, enter a preferred name in the **Preferred Staff Name** field or preferred position title in the **Preferred Position Title** field. If these are left blank, the **Default Staff Name** and **Default Position Title** from HR People Soft will display on the web.
- b. **Default Profile Image** comes from SPARK and is automatically pulled to T4 to display on the web. This can be changed in T4 using the **Preferred Profile Image** field, this will overwrite the SPARK profile image. Click the **Upload** button to resize and upload a photo to the Media Library OR click the **Select Media** button to select an image that is already uploaded to the Media Library. If your Staff Profile photo is exactly the same as your SPARK profile photo, update the data directly from the original source which is SPARK. Email grant.barrie@canterbury.ac.nz from the Research Office if you need help with SPARK.
- c. If you want to modify/add details that came from other systems, modify the data directly from the original source, for example – Research Interests from SPARK.
(See **Data Sources** section on page 14 for details)

9. **Preview** and check your changes

10. Publish (**'Save and Approve'**) if you are happy with the result

Add a manual Staff Profile (for a person who is NOT a UC staff member, eg, external lecturers, adjuncts, casuals, and visitors)

If the person you want to add **ISN'T** a UC staff member, **doesn't** have a UC username or Employee ID, they can be added manually. All fields have to be entered manually in T4 as their information do not already exist in other UC systems, therefore are not automatically pulled through to T4.

1. Login as a **Contributor** or a **Moderator**.
2. Locate the **Contact us** section and look for the **Staff Profiles** section for your department/college, for example, Science Staff Profiles or Engineering Staff Profiles
3. From the **'Actions' Dropdown menu** beside this section, select **'Create Content'**
4. Select the **'Staff Profile'** content type
5. Enter the appropriate staff member details:

- a. Enter their name in the **Preferred Staff Name** field
- b. Enter their position title in the **Preferred Position Title** field
- c. Enter their email address in the **Additional Email** field
- d. In the **Preferred Profile Image** field, either click **Select** (the photo must already be in the **Media Library**) or **Upload** to add a photo. The photo should be 900x1000 px



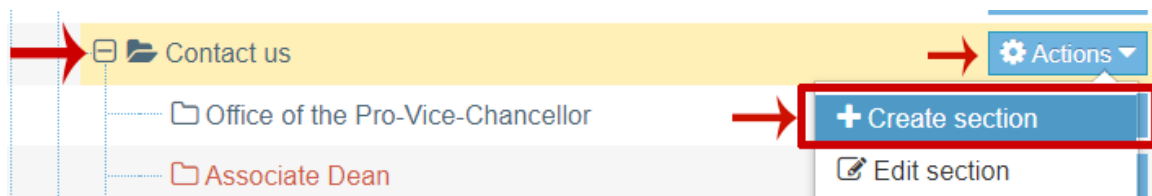
- e. Enter other relevant information if available
6. **'Preview'** to make sure you are happy with the result
7. Click **'Save changes'** to save or **'Save and Approve'** to publish

Create Staff Profiles listing using Staff Profile Contact Cards

To create a listing of **Staff Profiles** on the people or contact us pages, we use the **Staff Profile Contact Card** (steps 1a-l below) and **Related Contents** (steps 2a-h below) content types:

1. Create a new section for the **Staff Profile Contact Card** content types to live in:
 - a) From the **'Actions'** dropdown menu beside the **Contact us** section in your site, select

'Create Section'



- b) On the **General tab**, give this new section an appropriate name such as **Academic Staff** or **Technical Staff** and untick the **show in navigation?** tick box, the section/folder

will now look grey.

General Content types Page layouts More ▾

General section details

Name * Academic Staff

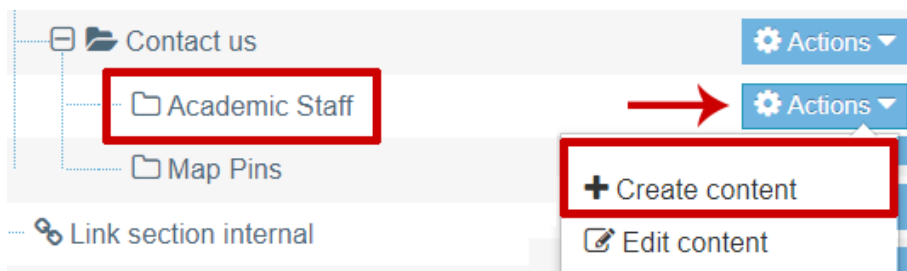
Status Approved ▾

Section options

Mark as link section

Show in navigation

- c) Click the '**Save changes**' button
- d) Add the **Staff Profile Contact Cards** to this section by hovering over the '**Actions**' dropdown menu of your new section and select **Create Content**



- e) Select the **Staff Profile Contact Card** content type

Staff Profile Contact Card

Search for academic and general staff profiles by searching on a name or part of name (for example: a search for 'will', finds all staff called 'William').

- f) In the **Name** field, enter the staff member name.

Name * Steven Paul Gieseg

- g) In the **Staff Profile** field, click the **Select** button.

Staff Profile *  Select Clear

- h) The **Staff Profile Lookup** window will appear. **Search** for the staff member by entering a name in the search box and select a **Location** (department where the staff member belongs). Click the **Search** button, then select the staff member from the list of search results

Staff Profile Lookup

Search for academic and general staff profiles by searching on a name or part of name (for example: a search for 'will', finds all staff called 'William').

You can filter the result by choosing a location (for example: searching on 'College of Arts' limits the result to staff in that College. If the person you are searching for is not in your search results, check other possible locations).

Location

→ College of Science

→ Steve Search

- Steven Aitken (Select)
- Steven Lewis Graham (Select)
- Steven Marsh (Select)
- Steven Paul Gieseg (Select)

i) The name of the person now appears in the **Staff Profile** field

Staff Profile * ⓘ → 👤 Steven Paul Gieseg Select
Clear

j) **Optional step:** You can overwrite the details from the original source by entering the details on the form. Leave as blank if you want to use the original value. The data will only appear on the contact card layout and **NOT** on the full staff profile.

k) **Preview** to make sure you are happy with the result

l) Click '**Save changes**' to save or '**Save and Approve**' to publish

2. Create a **Related Contents** content type in the main section (**Contact us**) to display the **Staff Profile Contact Cards** (step 1 above):

a) From the '**Actions**' **Dropdown menu** beside the **Contact us** section within your site, select '**Create Content**'

b) Select the '**Related Contents**' content type

Related Contents

Display all content in child section or specific section

c) Add a name in the **Name** field, eg, Academic Staff to help identify your content – this does not display on the web.

Name *

d) In the **H2 Heading** field, add a meaningful heading, eg, Academic Staff. This will appear above your Staff Profile Contact Cards/listing

H2 Heading

Academic Staff

e) From the **Content Type dropdown**, select **Staff Profile Contact Cards** (if you want to display their additional position title and additional email only) or select **Staff Profile Research Cards** if you want to display their fields of Research

Content Type

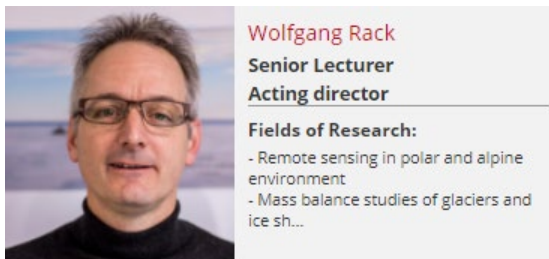
Staff Profile Contact Card

Contact Cards examples:

1. **Staff Profile Contact Card** displays their position title and contact details:



2. **Staff Profile Research Card** displays their fields of Research only if the Fields of Research is available. Otherwise, the Staff Profile Contact Card will be displayed:



f) In the **Child Section** field, click '**Add section link**' to browse and select the new section that you created in step 1 above



Child Section

+ Add section link

+ Add content link

g) **Preview** to make sure you are happy with the result

h) Click '**Save changes**' or '**Save and Approve**' to publish

Examples of Staff Profile pages as they appear on the web:

Full staff profile / personal page

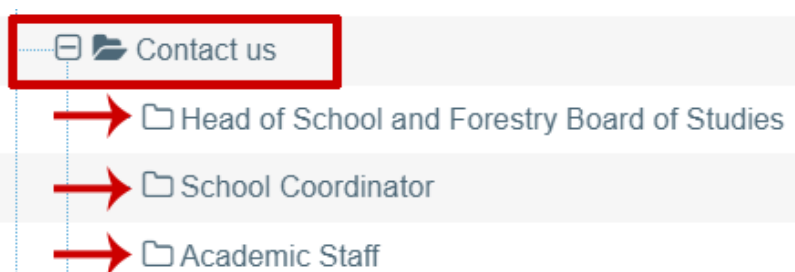
<http://www.canterbury.ac.nz/arts/contact-us/people/aaron-beehre.html>

Staff listing using contact cards

<http://www.canterbury.ac.nz/science/schools-and-departments/biological-sciences/contact-us/>

Modify a Staff Profile Contact Card

1. Locate the section where the content type **Staff Profile Contact Cards** are kept, they are usually inside the **Contact us** section



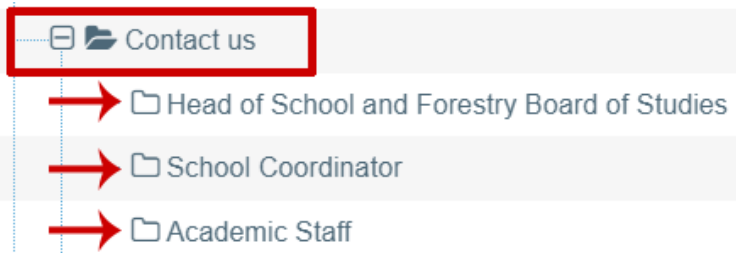
2. Locate the section you want to edit, for example **Academic Staff**, from the '**Actions**' dropdown menu, select '**Edit Section**'
3. On the **Content tab**, locate the name of the person you want to edit, from the '**Actions**' Dropdown menu, select **Edit**
4. The details for the person will display, modify/add to the existing details as appropriate, for example, **Additional Position Title**
5. Click **Preview** to make sure you are happy with the result
6. Click '**Save changes**' to save OR '**Save and Approve**' to publish

Note: The changes will only appear on the **Staff Profile Contact Card** NOT on **Staff Profiles** content type

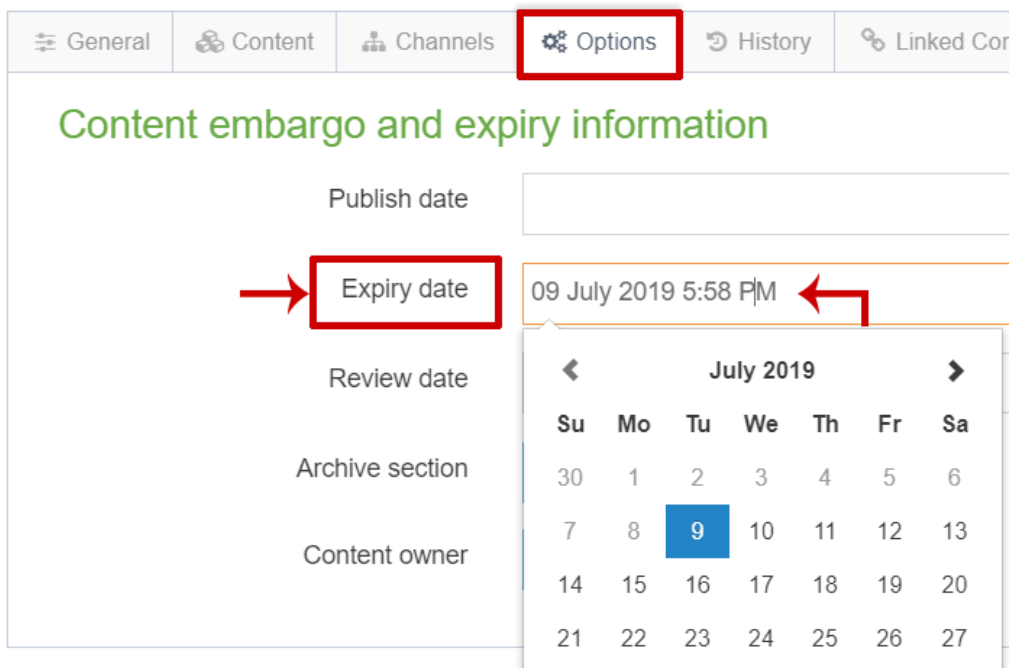
Remove a Staff Profile Contact card

If, for some reason, the content needs to be kept for later use, set an **Expiry Date** instead of **Delete**.

1. Locate the section where the content type **Staff Profile Contact Cards** are kept, it is usually inside the **Contact us** section



2. Locate the section you want to edit, for example **Academic Staff**, from the 'Actions' **dropdown menu** beside the section, select 'Edit Section'
3. On the **Content tab**, locate the name of the person you want to expire, from the 'Actions' **Dropdown menu** beside name, select 'Edit'
4. Click on the **Options** tab, click on the **Expiry date** field, the date pop up will appear, select a date and set the time from the date pop up.

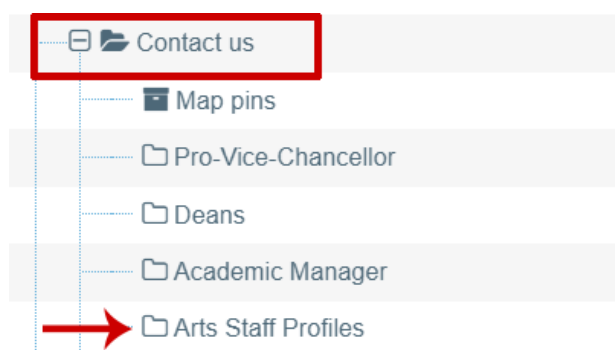


5. Click '**Save changes**' to save or '**Save and Approve**' to publish

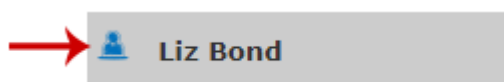
Modify a full Staff Profile

Staff profiles are imported from other systems and are created automatically.

1. Locate your Department/College Staff Profiles section (eg, **Arts Staff Profiles**) where the content types **Staff Profile** are kept for your site, it is usually inside the **Contact us** section



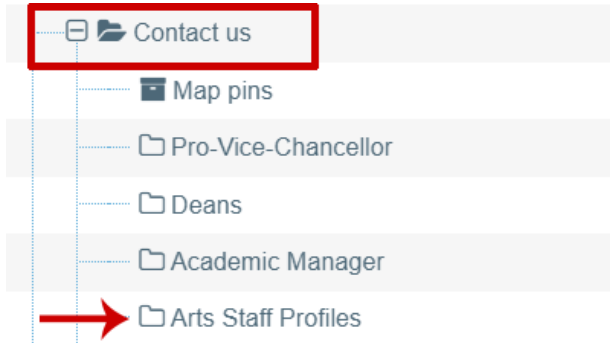
Please note: Staff Profile can also be edited by clicking on the Blue Person Icon inside the 'Staff Profile Contact Card'



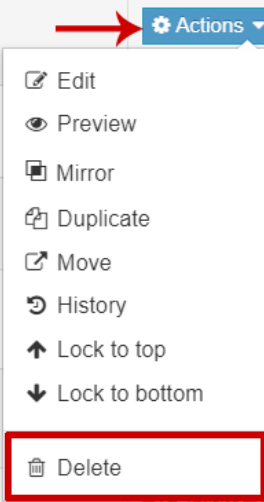
2. From the '**Actions**' dropdown menu, select '**Edit Section**'
3. On the **Content Tab**, locate the name of the person you want to edit. From the '**Actions**' **Dropdown menu** beside the person's name, select '**Edit**'
4. The details for the person will display, modify/add to the existing details as appropriate.
Note: If you would like the salutation to appear before the name – the T4 Display Salutation field must be set to "Yes". Staff profiles are automatically imported from other systems and regularly updated every night. With the exception of Name, Position Title and Profile Image, you can only modify/add fields that are not imported from other systems. If you want to modify/add details that came from other systems, modify the data directly from the original source, for example – Research Interests from SPARK. (See Data Sources section on page 28 for details)
5. Click **Preview** to make sure you are happy with the result
6. Click '**Save changes**' to save OR '**Save and Approve**' to publish

Remove a Staff Profile from your site

1. Locate your Department/College Staff Profiles section (eg, **Arts Staff Profiles**) where the content type **Staff Profile** are kept for your site, it is usually inside the **Contact us** section



2. From the **'Actions' dropdown menu** beside this Department/College Staff Profiles section, select **'Edit' Section**
3. On the **Content Tab**, locate the name of the person you want to remove. From the **'Actions' dropdown menu** beside the content name, select **Delete**

Aaron Beehre Staff Profile	66.0	Approved	June 23, 2019 7:02 PM	N/A	
Aaron Kreisler Staff Profile	122.0	Approved	July 2, 2019 7:02 PM	N/A	
Adam Lam Staff Profile	120.0	Approved	June 19, 2019 7:00 PM	N/A	
Aidan Moody Staff Profile	5.0	Approved	September 20, 2018 9:26 AM	N/A	
Alan Wright Staff Profile	128.0	Approved	June 23, 2019 7:01 PM	N/A	
Albert Belz	7.0	Approved	March 2, 2019	N/A	

4. This message will appear

Delete content

Are you sure you want to mark "Scott Mansfield" as deleted?

Content also appears in:

ROOT » Canterbury.ac.nz » WebGuide » Contact us » Web Team Staff Profiles

Delete action

- Remove from Section
 Delete content

Cancel

Delete content

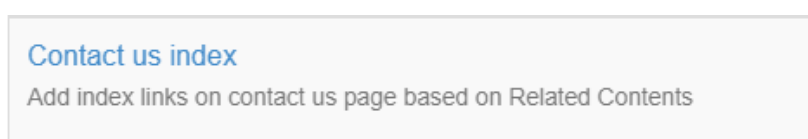
Click **'Delete content'** to confirm

Add contact us index links

To create the index links on the [Contact us](#) pages, we need to create a 'Contact us index' content type, this displays the 'Related Contents' that are in the section. The name of the **Related Contents** will be displayed as the index links, for example:

[OFFICE OF THE PRO-VICE-CHANCELLOR](#) | [ASSOCIATE DEANS](#) | [ACADEMIC MANAGER](#) | [STUDENT ADVISORS](#) | [ADMINISTRATORS](#) | [COORDINATORS](#)

1. Locate the **Contact us** section within your site, from the '**Actions**' dropdown menu beside the section, select '**Create Content**'
2. Select the **Contact us index** content type



3. In the **Name** field, enter this text "Contact us index"

4. Click **Preview** to check the index on the page. Make sure this appears on the top of your Contacts page above the Staff Profiles Contact Cards
5. Click '**Save changes**' to save OR '**Save and Approve**' to publish

Data sources for Staff Profiles

Field names	Source	Explanation
Name *	Manual in T4	Helps identify your content in T4 and does not display on the web.
Default Staff Name	HR People Soft	Display name by default – from HR. Displays if the Preferred Staff Name field is blank
Preferred Staff Name	Manual in T4	Overwrites Default Staff Name field
Staff Username	Manual in T4	Can be found in Outlook
Employee ID	Manual in T4	Can be found on your staff card or contact HR
Display Salutation	Select Yes or No	Display the salutation from HR
Salutation	HR	Displays if Display Salutation is selected Yes
Default Profile Image	SPARK	Display image by default – from SPARK. Displays if the Preferred Profile Image is blank. Research Office contact grant.barrie@canterbury.ac.nz

Preferred Profile Image	Manual in T4	Overwrites the Default Profile Image field
Default Position Title	HR People Soft	Displays if the Preferred Position Title field is blank
Preferred Position Title	Manual in T4	Overwrites the Default Position Title field
Additional Position Title	Manual in T4	Shows an additional Position Title
Iwi	Manual in T4	Updates by departments
Te reo	Manual in T4	Updates by departments
Email	Active Directory	Contact IT for updates, create an Assyst Ticket
Additional Email	Manual in T4	Shows an additional email address
Physical Address	Active Directory	Contact IT for updates, create an Assyst Ticket
Phone	Active Directory	Contact IT for updates, create an Assyst Ticket
Internal Phone	Active Directory	Contact IT for updates, create an Assyst Ticket
Mobile	Manual in T4	Updates by department
Linkedin Profile URL	SPARK	Update in SPARK
Courses	CIS	Link courses to the CIS. Update in Course Maintenance . Only link to Currently Offered Courses, will not display courses that are not offered or past current date.
Profile Quote	SPARK	Update in SPARK
Qualifications	SPARK/HR PeopleSoft	Update in HR Peoplesoft
Memberships	SPARK	Update in SPARK
Other Information	Manual in T4	Updates by department
Awards	SPARK	Update in SPARK
Awards display	Manual in T4	To overwrite the Awards field
Profile Link	Manual in T4	Link to external personal page
Research Interests	SPARK	Update in SPARK
Field of Research	SPARK	Update in SPARK
Research, Scholarly or Creative Works	SPARK	Update in SPARK
Additional Image	Manual in T4	To display in content blocks
Display Full Profile	SPARK	
Myscheduler ID	Manual in T4	To make an appointment
Researcher Id	SPARK	