

PeopleFinder QuestField Formatting

QuestObjects Tech Note 011
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⇒ This tech note describes what distinguishes a PeopleFinder QuestField from a regular AutoComplete QuestField, and explains how the PeopleFinder Content Channel is configured for displaying people data in various ways.

1. What is special about a PeopleFinder QuestField?

On the Client

On the client, the "PeopleFinder QuestField" is a regular AutoComplete QuestField with a pre-formatted drop-down list (referred to as the "popup list" because it can also be configured to appear above the entry field instead of dropping down). The PeopleFinder QuestField's popup list applies visual formatting optimized for displaying person records. The PeopleFinder popup list includes an optional email icon. In all other respects, a PeopleFinder QuestField is exactly the same as an AutoComplete QuestField, as it is described in the AutoComplete QuestField Administration Guide.



AutoComplete QuestFields are deployed in a `...qo/` subdirectory. The only file that distinguishes a PeopleFinder QuestField from any other AutoComplete QuestField is the `.swf` file that represents the popup list object. By default, the following popup file is used by PeopleFinder QuestFields:

```
...qo/client/flash/v{version}/qo-autocomplete-popup.swf
```

⇒ Note that PeopleFinder is the default popup list for AutoComplete QuestFields. It is therefore not necessary to specify the `popupFile` parameter when embedding a PeopleFinder QuestField in a page. Customized AutoComplete QuestField popup objects use a name that includes the domain name of the licensee, e.g. `popup-com-companyname-productfinder.swf`.

On the Server

A PeopleFinder QuestField establishes a connection with a PeopleFinder content channel on the QuestObjects Server. A PeopleFinder content channel is a QuestObjects content channel configured to query a people database. In most cases, the people database resides in a directory that is accessed by QuestObjects using LDAP (Lightweight Directory Access Protocol). For this purpose, a special *PeopleFinder LDAP CAM* (Content Access Module) was developed.

The PeopleFinder LDAP CAM intelligently queries the directory, allowing users to find people by typing person names in various ways:

- "Starts with" (Finds persons whose first name *or* last name matches the query);
- `FirstName LastName` (Space-separated, where the last word is considered the start of the last name);
- `LastName, FirstName` (Comma-separated, where the first name starts after the comma);
- Literal match (Optionally performed when the user only types 1 or 2 characters. For example, rather than finding a huge number of people whose name starts with "Jo", including all the Johns, this returns only the persons whose name is "Jo").



⇒ Note that if the people database is not accessed through LDAP, it possible to configure the SQL or Java CAMs for use by a PeopleFinder QuestField. In the case of the SQL CAM, the SQL query is customized to allow the various query options that are already built-in to the LDAP PeopleFinder CAM. Actual query syntax depends on the tables and on the SQL dialect used (Oracle, DB2, SQL Server, MySQL, PostgreSQL, etc.).

2. Configuring the PeopleFinder Content Channel

The PeopleFinder LDAP CAM fetches its data from the directory using one or more sub queries, whereby the LDAP attributes correspond to:

```
UNIQUE_KEY, NAME_A, NAME_B {, META_0, ..., META_X}
```

Whereby:

- `UNIQUE_KEY` must be unique and may not be empty;
- `NAME_A` and `NAME_B` are automatically concatenated into a single column, `CONCATENATED_NAME`;
- The metadata columns (`META_0` etc) are optional, but may not return `null` values if used.

The PeopleFinder LDAP CAM concatenates first and last names using the concatenation strings defined in the channel (typically using a `comma` between last name and first name and a `space` between first name and last name).

⇒ In most LDAP directories, `NAME_A` and `NAME_B` correspond to attributes `SN` and `GIVENNAME`. The order of the attributes in the LDAP query depends on the individual content channel sub query.

When using a different CAM (such as SQL or Java), the concatenation of first and last name must be done in the query itself. In an SQL database, this is most easily done by creating a view, such as:

```
create view people_flat ( lastname, firstname, UNIQUE_KEY,
                        CONCATENATED_NAME, META_0, ..., META_X ) as
( select lastname, firstname, UNIQUE_KEY,
  firstname || ' ' || lastname, META_0, ..., META_X from people union all
  select lastname, firstname, UNIQUE_KEY,
  lastname || ',' || firstname, META_0, ..., META_X from people );
```

⇒ Regardless of the database and CAM used, it is essential that the first name and last name attributes (typically `SN` and `GIVENNAME` when using LDAP) be indexed and optimized for lowercase queries (AutoComplete QuestFields automatically convert user entry into lowercase).

3. How the Standard PeopleFinder QuestField Displays Information

The generic PeopleFinder QuestField displays the following data in its list:

- `CONCATENATED_NAME` (always shown);
- `META_0 ... META_3` (only shown if not empty).

Whereby:

```
CONCATENATED_NAME = Person name (last/first or first/last)
META_0 = Any Meaningful String (typically: phone number)
META_1 = Email Address (used by the email function)
META_2 = Any Meaningful String (typically: location and/or function)
META_3 = Any Meaningful String (typically: description that further identifies the person)
```



List Formatting

The PeopleFinder QuestField list is formatted as follows:

CONCATENATED_NAME - META_3 (**META_2**) META_0

(META_1 is used as the email address)

Whereby:

- **CONCATENATED_NAME** is formatted in **Bold**;
- **META_3** is preceded by a dash and a space -
- **META_2** is enclosed in parentheses (**)**

4. PeopleFinder QuestField List Formatting Examples

The following are a few examples of how list cells can be formatted using the generic PeopleFinder QuestField. The optional email icon is always appended to the right of the string.

- Smith, John** +1 XXX XXX-XXXX 
- Smith, John** - Accounting (New York) +1 XXX XXX-XXXX 
- Smith, John** (New York) +1 XXX XXX-XXXX 
- Smith, John** - New York (XXX) XXX-XXXX 
- Smith, John** (+1 XXX XXX-XXXX) Software sales 
- Smith, John** - (XXX) XXX-XXXX Accounting 

⇒ If the metadata includes an email address, it is displayed as an email icon appended to the right of the string. When the user clicks on this icon, the user's email application is opened allowing the user to quickly send an email.

If the result string is too long to display both the phone number and the email icon, the email icon automatically becomes transparent, revealing itself only when the user hovers the mouse over it. In this case, the person's phone number and email address are displayed at the bottom of the list.



5. PeopleFinder QuestField Customization

A standard PeopleFinder QuestField offers flexible layout options, as described in this tech note. However, like any AutoComplete QuestField, the PeopleFinder QuestField can be customized at very low cost to further suit your specific application needs. Customization options include multi-line result lists, various color and font options, and additional icons (such as an icon that integrates the QuestFields into a telephone API). In fact, thanks to its modular architecture and powerful client-side UI technologies, an AutoComplete QuestField can be enhanced with virtually any additional user interface option.