KNOWLEDGE BASE ARTICLE

How to Set Up the Refinement Panel in Employee Directory

2026 © Vitextra SIA. All rights reserved.

Disclaimer

For the purposes of this Disclaimer:

- **Company** (referred to as either "the Company", "We", "Us" or "Our" in this Disclaimer) refers to Vitextra SIA, LV-1009 Riga, Matise iela 61 - 25.
- **Document** refers to the Knowledgebase Article.
- **You** means the individual accessing the Document, or the company, or other legal entity on behalf of which such individual is accessing or using the Document, as applicable.
- **Website** refers to Vitextra, accessible from https://vitextra.com

Disclaimer

The information contained in the Document is for general information purposes only.

The Company assumes no responsibility for errors or omissions in the contents of the Document.

In no event shall the Company be liable for any special, direct, indirect, consequential, or incidental damages or any damages whatsoever, whether in an action of contract, negligence, or other torts, arising out of or in connection with the use of the contents of the Document. The Company reserves the right to make additions, deletions, or modifications to the contents in the Document at any time without prior notice.

Errors and Omissions Disclaimer

The information given by the Document is for general guidance on matters of interest only. Therefore, errors can occur even if the Company takes every precaution to ensure that the Document's content is current and accurate. Plus, given the changing nature of laws, rules, and regulations, there may be delays, omissions, or inaccuracies in the information contained in the Document.

The Company is not responsible for any errors or omissions, or for the results obtained from the use of this information.

Fair Use Disclaimer

The Company may use copyrighted material that the copyright owner has not explicitly authorized. The Company is making such material available for criticism, comment, news reporting, teaching, scholarship, or research.

The Company believes this constitutes a "fair use" of any such copyrighted material as provided for in section 107 of the United States Copyright law.

If You wish to use copyrighted material from the Document for your own purposes that go beyond fair use, You must obtain permission from the copyright owner.

"Use at Your Own Risk" Disclaimer

All information in the Document is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information, and without warranty of any kind, express or implied, including, but not limited to warranties of performance, merchantability and fitness for a particular purpose.

The Company will not be liable to You or anyone else for any decision made or action taken in reliance on the information given by the Service or for any consequential, special or similar damages, even if advised of the possibility of such damages.

Contact Us

If you have any questions about this Disclaimer, You can contact Us by email: support@vitextra.com.

Table Of Contents

Which web parts support the refinement panel 4

Enable the refinement panel 5

Add and configure refiners 5

Use custom profile properties as refiners 7

Using the refinement panel 8

How refiners work with search and quick filters 9

Display notes and limitations 10

The refinement panel in the Vitextra Employee Directory web part lets employees narrow the directory by the attributes that matter to your organization — department, job title, office location or any other profile property — in a couple of clicks. This article explains which web parts support the panel, how an administrator enables and configures it, and how end users work with it.

Which web parts support the refinement panel

The refinement panel is available in both directory web parts, but it gets its values from different places:

Web part and data source	Refinement panel	Where the values come from
Employee Directory with the **User profiles** data source	Yes	SharePoint search refiners, calculated by the search service for the current query
Employee Directory with the **Entra ID (Azure AD)** data source	No — the **Refinement Panel** settings group is hidden	—
Employee Directory (Entra ID)	Yes	Calculated in the browser from the employees loaded from Microsoft Graph
New Employees	No	—

Note

In the **Employee Directory** web part, the **Refinement Panel** group appears in the web part settings only when **Data Source** is set to **User profiles**. If you switch the source to **Entra ID (Azure AD)**, the panel is not shown, even if it was enabled before.

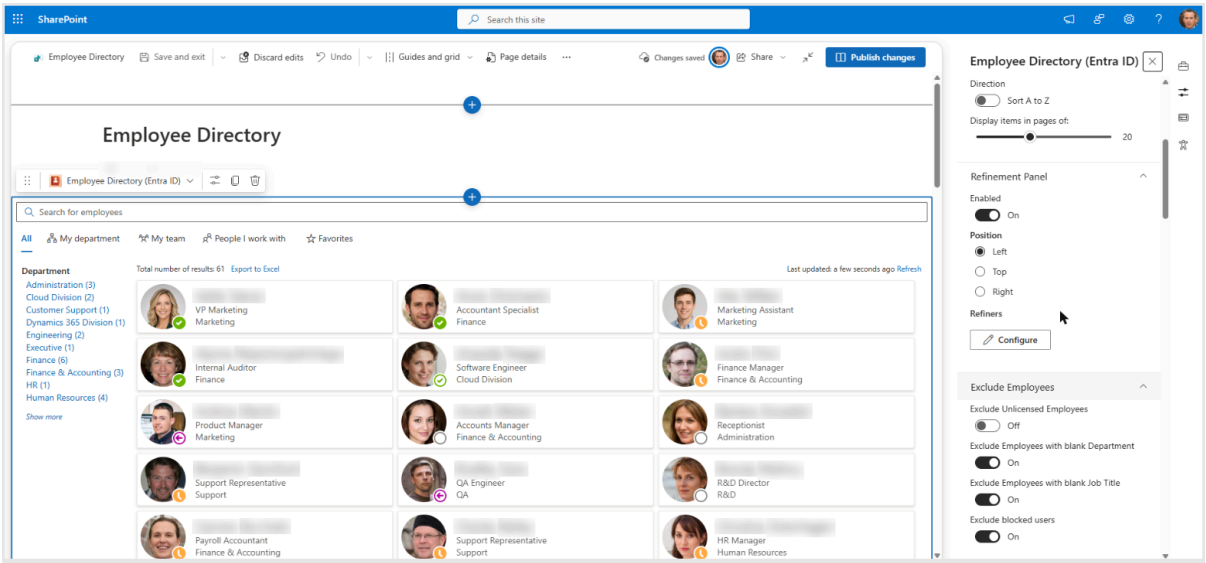
Tip

If you are still deciding which web part to use, see KB10310. Employee Directory vs. Employee Directory (Entra ID): Which Web Part to Choose. To add the web part to a page, see KB10309. How to Add and Configure the Employee Directory Web Part.

Enable the refinement panel

1 Open the SharePoint page that contains the web part and select **Edit**.
2 Select the web part and then select **Edit web part** (the pencil icon) to open the property pane.
3 Expand the **Refinement Panel** group.
4 Turn on the **Enabled** toggle.
5 Under **Position**, choose where the panel is displayed:
6 Configure at least one refiner (see the next section). The panel is not displayed until it has refiners.
7 Republish the page.

The **Position** options are unavailable while the **Enabled** toggle is off.



The Refinement Panel group in the web part settings

Add and configure refiners

Refiners are managed in a separate editor. In the **Refinement Panel** group, under **Refiners**, select **Configure**. The **Refiners** panel opens with a table of the configured refiners and an empty row at the bottom for adding a new one.

To add a refiner:

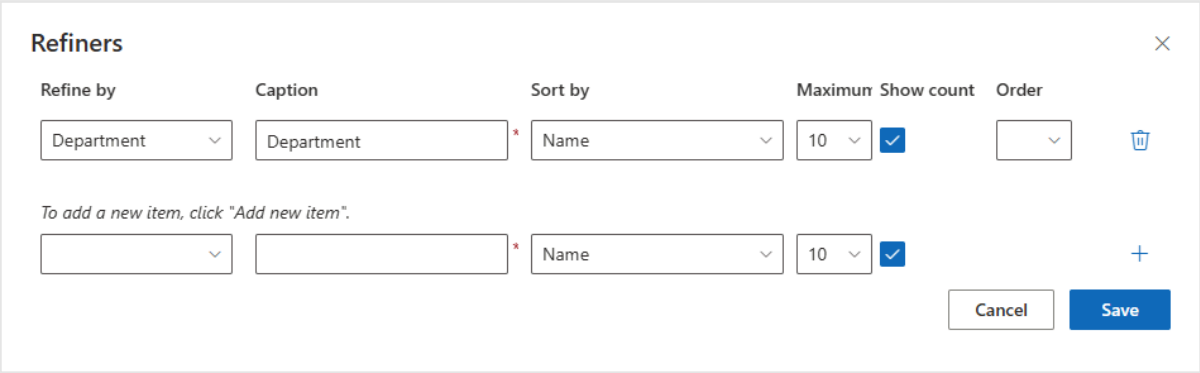
1 In the empty row at the bottom of the table, fill in **Refine by** and **Caption**, and adjust the other settings if needed.
2 Select **Add new item** (the plus icon at the end of the row). The refiner is added to the table.
3 Repeat for each refiner you need.
4 Select **Save** to apply the changes, or **Cancel** to discard them.

Each refiner has the following settings:

Setting	Description
Refine by	The property whose values are offered as refinement options. In **Employee Directory** (User profiles), type the name of a SharePoint search managed property, for example `Department` or `RefinableString00`. In **Employee Directory (Entra ID)**, select one of the columns configured for the web part (built-in columns and custom attributes). Required.
Caption	The heading displayed above the refiner's values, for example *Department*. Required.
Sort by	**Name** — values in alphabetical order; **Count** — values with the most employees first. Default: **Name**.
Maximum number of items	How many values are shown before the **Show more** link, from 1 to 30. Default: 10.
Show count	Displays the number of matching employees next to each value, for example *Sales (12)*. On by default.
Order	The position of the refiner in the panel. Selecting a different number moves the refiner up or down.

To remove a refiner, select **Delete Row** (the trash can icon) at the end of its row, then

select **Save**.



The Refiners configuration panel

Warning

Refine by and **Caption** are required for every refiner. If either is empty, the editor shows "This field is required" and the changes are not saved. Changes made in the editor are applied only after you select **Save**; **Cancel** restores the previous configuration.

Use custom profile properties as refiners

data source.

With the **User profiles** source, the refinement values are calculated by SharePoint search, so **Refine by** must be the name of a managed property that is marked as **Refinable** in the search schema. A user profile property that is not mapped to a refinable managed property cannot be used as a refiner: SharePoint search does not return refinement values for it, and the refiner does not appear (or the search query is rejected).

To make a custom user profile property available as a refiner:

1 Make sure the property exists in the user profile service and has values for your employees. Each user profile property is crawled as a crawled property named `People:<PropertyName>`.
2 Open the SharePoint admin center and go to **More features** > **Search** > **Open** > **Manage Search Schema**.
3 On the **Managed Properties** tab, find an unused refinable property, for example `RefinableString00`, and open it for editing.
4 Under **Mappings to crawled properties**, add a mapping to the crawled property `People:<PropertyName>`.

5 Optionally, enter an alias (for example `OfficeRegion`) so the property is easier to recognize.
6 Save the managed property and wait until user profiles are crawled again. New mappings do not take effect immediately; it can take from several hours to a few days before the values appear in search.
7 In the **Refiners** editor, enter the managed property name (for example `RefinableString00`) in **Refine by**.

Note

Built-in managed properties are not all refinable. Before you use a built-in property such as `Department` or `JobTitle`, check in the search schema that its **Refinable** setting is enabled; if it isn't, map the corresponding `People:` crawled property to a `RefinableString` property as described above.

Tip

To also show a custom property in the results and on the details pane, see KB10049. How to Add Custom Attributes to the Employee Directory Web Part.

In **Employee Directory (Entra ID)** no search schema changes are needed: the refiner values are calculated from the data already loaded from Microsoft Graph. To refine by a custom Entra ID attribute, first add it as a custom attribute of the web part — see KB10060. How to Display Custom Entra ID Attributes in the Employee Directory Web Part — and then select it in **Refine by**.

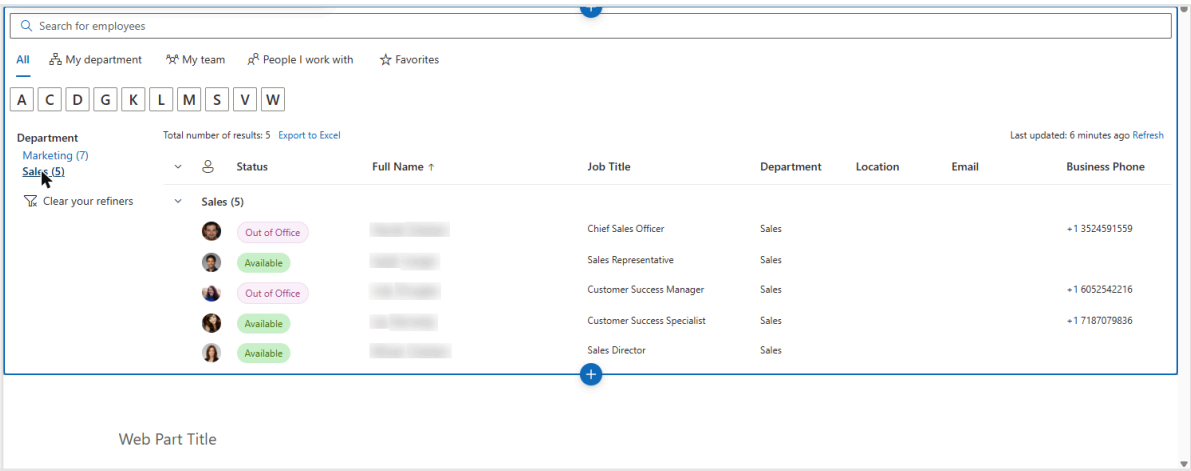
Using the refinement panel

For employees, the refinement panel is a list of headings (the refiner captions) with the available values under each heading.

- **Select a value** to show only the employees who have that value. The selected value is highlighted, and the results update immediately.
- **Combine refiners** to narrow the results further. Values selected in different refiners are combined: for example, *Department: Sales* and *Office: Riga* show only the Sales employees in the Riga office.
- **One value per refiner.** Selecting another value in the same refiner replaces the previous selection; you cannot select two departments at once.
- **Show more / Show fewer.** When a refiner has more values than its configured maximum, select **Show more** to see all of them and **Show fewer** to collapse the list

again.

- **Counts.** If the administrator turned on **Show count**, the number in parentheses next to each value is the number of matching employees.
- **Clear your refiners.** As soon as at least one value is selected, a **Clear your refiners** button appears at the bottom of the panel. Select it to remove all refinements and return to the unrefined results.



The refinement panel with a selected value

The two web parts differ slightly in how values behave:

	Employee Directory (User profiles)	**Employee Directory (Entra ID)**
Deselecting a value	Select **Clear your refiners**	Select the highlighted value again, or select **Clear your refiners**
Counts and values	Recalculated by SharePoint search for the current search text, quick filter and selected refiners	Calculated once from all employees shown by the web part (after the exclusions and the filter configured by the administrator); they don't change when you search or select other refiners
Employees with no value	Not listed as a value	Listed as **(Empty)**; select it to find employees whose property is blank

How refiners work with search and quick filters

The refinement panel works together with the search box and the quick-filter bar:

- **Search box.** In **Employee Directory** (User profiles), refinements stay applied when you run a new search, so you can, for example, select *Department: Sales* and then search for a name within that department. In **Employee Directory (Entra ID)**, typing in the search box resets the selected refiners and filters the full list again.
- **My department.** The refiners remain available and can be combined with the quick filter. Switching to another quick filter resets the selected refiners.
- **My team, People I work with and Favorites.** These quick filters work with their own short lists of people, so the refinement panel is hidden while one of them is active. It reappears when you return to the full directory or to **My department**.
- **Reset.** In **Employee Directory**, the **Reset** link clears the search text, the quick filter and the selected refiners at once.

Tip

For details on each quick filter, see KB10214. Employee Directory Quick Filters: My Department, My Team, People I Work With, Favorites. For the A–Z navigation, exclusions and the filter editor of the Entra ID web part, see KB10311. How to Configure the Employee Directory (Entra ID) Web Part: Filters, Exclusions and A–Z Navigation.

Display notes and limitations

- **Narrow layouts.** The refinement panel is hidden when the web part is narrower than 641 pixels — for example, on phones or in a narrow page column. In a left or right position, the panel is 200 pixels wide (150–160 pixels on medium widths).
- **Cards view.** In **Employee Directory** (User profiles) with the cards layout, the panel is shown only while the search returns at least one employee.
- **Empty refiners.** A refiner with no values for the current results is not displayed.
- **Duplicate refiners.** In **Employee Directory** (User profiles), if the same managed property is added twice, only the first refiner is shown.

Note

The refinement panel filters only what the web part already shows. People hidden by the web part's own settings — for example, accounts hidden from address lists, excluded unlicensed or disabled accounts, or employees filtered out by the administrator's filter — never appear in the refiner values.