




INSIGHTFUL PROFILES: A WEB PART FOR SHAREPOINT

TECHNICAL DOCUMENTATION

Torpedo – Serviços de Informática, Lda.

Torpedo.pt
20/03/2024

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1 DOCUMENT VERSION HISTORY

Table 1 - Name and Document Content

DOCUMENT NAME	CONTENT
trpd_spo_insightfulprofiles_technicaldocumentation.pdf	Technical Documentation

1.1 VERSION HISTORY


Table 2 - Version History

VERSION HISTORY						
VERSION N°.	AUTHOR	DATE	REVISIO NED BY	DATE OF REVISION	APPROVE D BY	APPROVAL DATE
1.0.0.1	Francisco Ferreira	23/10/2023	Bruno Teixeira	22/11/2023	Bruno Teixeira	22/11/2023
1.0.0.2	Francisco Ferreira	02/01/2024	Bruno Teixeira	02/01/2024	Bruno Teixeira	02/01/2024
1.0.0.3	Francisco Ferreira	17/01/2024	Bruno Teixeira	17/01/2024	Bruno Teixeira	17/01/2024
1.0.1.31	Francisco Ferreira	30/01/2024	Bruno Teixeira	30/01/2024	Bruno Teixeira	30/01/2024
1.0.1.34	Francisco Ferreira	20/03/2024	Bruno Teixeira	20/03/2024	Bruno Teixeira	20/03/2024
1.0.1.37	Henrique Serafim	02/07/2024	Bruno Teixeira	02/07/2024	Bruno Teixeira	02/07/2024


1.2 DISTRIBUTION

Table 3 - Distribution List


NAME	COMPANY	BOARD
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trpd_spo_insightfulprofiles_technicaldocumentation.pdf	Torpedo.pt	Market Place
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2 SUMMARIES

2.1 OBJECTIVE

Web Parts are modules of functionality that you can add to SharePoint Online. These modules are created by development teams and allow adding more functionalities to those already existing from scratch in SharePoint. The web parts are delivered in a package format (files with '.sppkg' extension), allowing to install several web parts in the customer's SharePoint Online tenant.

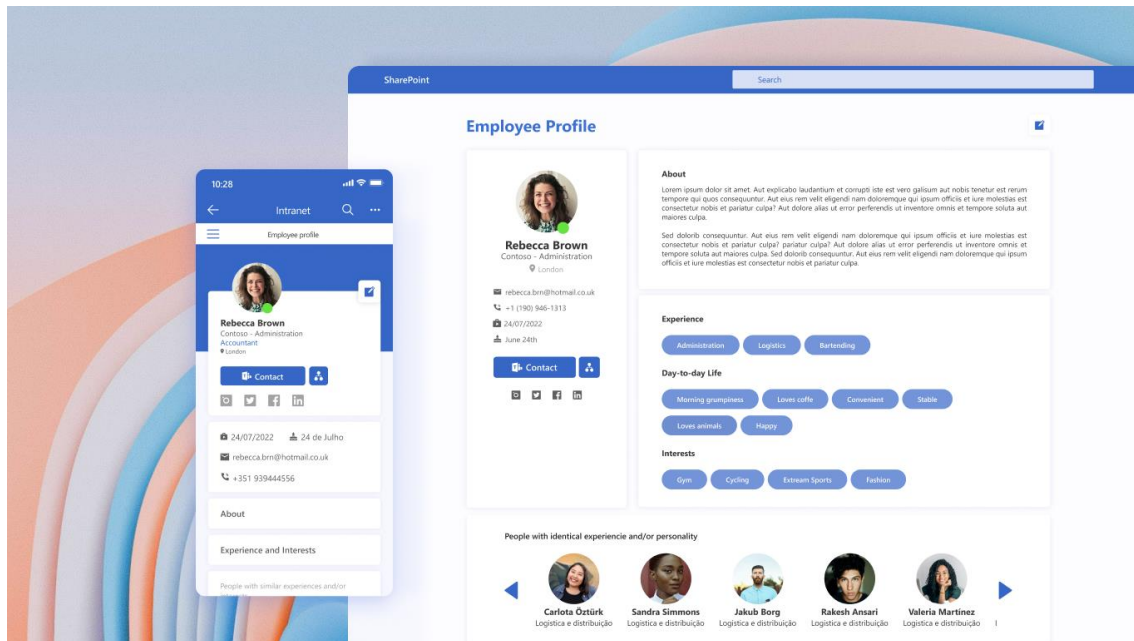



Figure 1 - Web Part Teaser

2.2 BRIEF DESCRIPTION OF THE PRODUCT


The **Insightful Profiles: a web part for SharePoint** redefines user engagement within your digital workplace. This dynamic web part serves as a central hub for user profiles, providing a comprehensive view of individuals, their roles, and fostering meaningful connections throughout your organization.

Main features of the web part:

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- **Comprehensive User Profiles:** Display essential details such as name, position, photograph, department, location, and contact information. Capture the essence of individuals with a visually appealing layout featuring biographies, interests, and experiences.
- **Filter and Connect:** Empower users to filter profiles based on experiences or interests, encouraging connections and collaboration. Identify and connect with colleagues who share similar interests and experiences effortlessly.
- **Versatile Operation Modes:** Choose between utilizing SharePoint lists or tapping into Azure Active Directory and Delve user profiles for seamless integration. Enjoy flexibility in adapting the web part to your preferred data source for user profiles.
- **Editing Mode:** Enable users to edit all their information, interests, and experiences directly within the web part, ensuring up-to-date and personalized profiles.
- **Customizable Color Scheme:** Personalize the appearance of the web part by customizing its color scheme to align with your organization's brand. By default, it seamlessly adopts SharePoint's base colors, ensuring cohesive visual integration.

Elevate your SharePoint Online environment with the **Insightful Profiles: a web part for SharePoint**. Encourage meaningful connections, collaboration, and a sense of community among your team members. Unleash the power of dynamic user profiles to create a more engaging and interconnected workplace.

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3 REQUIREMENTS

The **Insightful Profiles: a web part for SharePoint** offers two modes of operation: using lists or using information from the Azure Active Directory and Delve. For the first operating mode, the following requirements are necessary. The following requirements are necessary:

- Microsoft SharePoint Online;
- Microsoft Azure Active Directory and Delve (**Active Directory Mode**)
- SharePoint Lists
 - PeopleDirectory

Table 4 - PeopleDirectory list columns and data types

COLUMN	TYPE
Title	Single Line of Text (Required)
Name	Single Line of Text
Position	Single Line of Text
Company	Single Line of Text
Department	Single Line of Text
Email	Single Line of Text
Phone	Single Line of Text
Location	Single Line of Text
UserGUID	Single Line of Text
Birthday	Date and Time
Service	Single Line of Text
Consent	Choice
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group

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- PeopleDirectoryPhotos


Table 5 - PeopleDirectoryPhotos list columns and data types

COLUMN	TYPE
Title	Single Line of Text (Required)
UserGUID	Single Line of Text
Base64	Multiple Lines of Text
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group

- Perfis

Table 6 - Perfis list columns and data types

COLUMN	TYPE
Title	Single Line of Text (Required)
UserGUID	Single Line of Text
Question1Value	Lookup
Question2Value	Lookup
Question3Value	Lookup
Question4Value	Lookup
Question5Value	Lookup
Question6Value	Lookup
Question7Value	Lookup
Question8Value	Lookup
birthdaysIsVisible	Yes/No
facebook	Hyperlink or Picture
instagram	Hyperlink or Picture
linkedin	Hyperlink or Picture
twitter	Hyperlink or Picture

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AboutMe	Multiple Lines of Text
Birthday	Date and Time
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group

- Question1, Question2, Question3, Question4, Question5, Question6, Question7 and Question8


Table 7 - Question list columns and data types

COLUMN	TYPE
Title	Single Line of Text (Required)
Approved	Yes/No
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group

- Permission level for using the web part
 - Contributor or higher (permission to add, edit records in SharePoint lists)

Table 8 - Allowed permissions levels for using the web part

PERMISSION LEVEL	ACCESS RIGHTS
Contribute	Add, view, update and delete list items and documents
Edit	Edit, add, and delete lists; view, add and update list items
Full Control	Full control over the site, lists, libraries, and settings


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- The permission level for installing the web part
 - Tenant Administrators;
 - Access to the SharePoint Application Center (app catalog) to deploy web parts;

Table 9 - Allowed permissions levels for installing the web part

PERMISSION LEVEL	ACCESS RIGHTS
Full Control	Full control over the site, lists, libraries, and settings

To know more about permissions on SharePoint Online click [here](#)

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4 INSTALLATION

The solution consists of a ".sppkg" file that will have to be added to the SharePoint Online Tenant's AppCatalog through the SharePoint Application Center.

Using a Tenant administrator account, access the SharePoint Online [application catalog](#).



Figure 2 - Add SharePoint App

Add the ".sppkg" file to be installed.

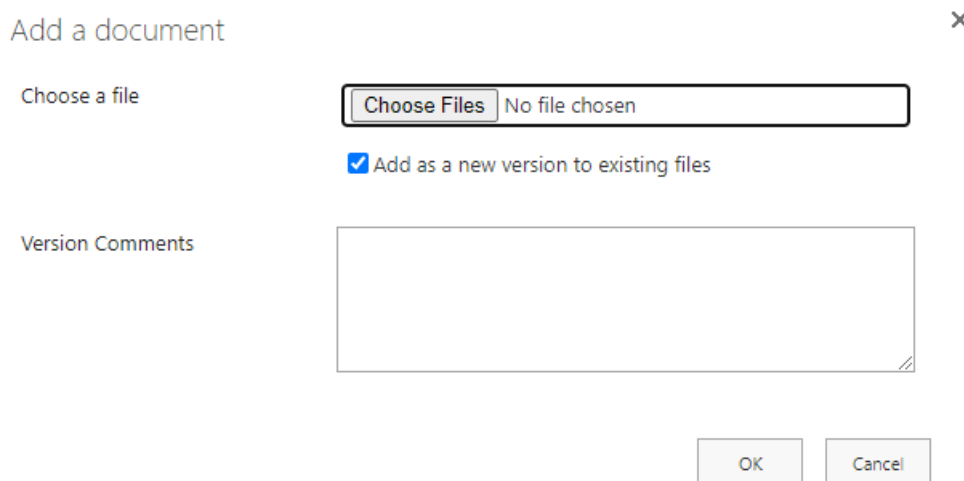



Figure 3 - Add ".sppkg" file to be installed

Enable the application to be available to all sites.

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Do you trust Insightful Profiles Web Part for SharePoint? ×

The client-side solution you are about to deploy contains full trust client side code. The components in the solution can, and usually do, run in full trust, and no resource usage restrictions are placed on them.



Insightful Profiles Web Part for SharePoint

This client side solution will get content from the following domains:

SharePoint Online

Make this solution available to all sites in the organization

Please go to the API Management Page to approve pending permissions. These are the permissions that need to be reviewed: Microsoft Graph, Directory.Read.All; Microsoft Graph, Directory.ReadWrite.All; Microsoft Graph, Group.Read.All; Microsoft Graph, Group.ReadWrite.All; Microsoft Graph, GroupMember.Read.All; Microsoft Graph, GroupMember.Read.All; Microsoft Graph, User.Read.All; Microsoft Graph, User.Read; Microsoft Graph, User.ReadBasic.All; Microsoft Graph, User.ReadWrite.All; Microsoft Graph, User.ReadWrite


Figure 4 - Enable the app to be available to all sites

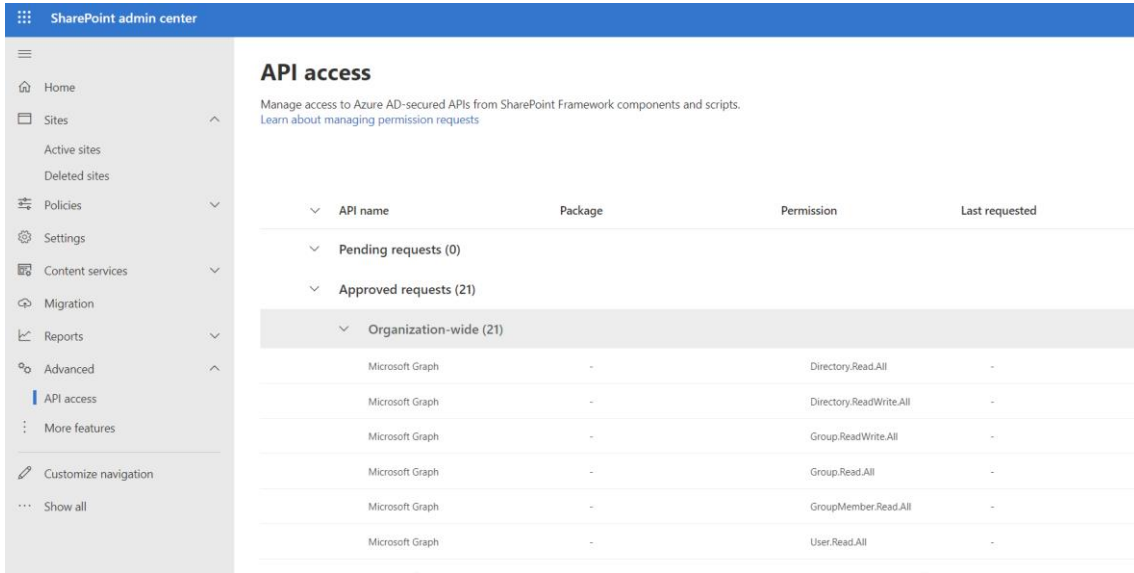
4.1 GRANT API ACCESS PERMISSIONS

For its correct functioning, **Insightful Profiles: a web part for SharePoint** requires permissions to use the Microsoft Graph API, to obtain information from all user profiles saved in Azure Active Directory and Delve.

For this, using a tenant administrator account, access the SharePoint Online application catalog and go to **"Advanced"** and then **"API access"**.

All pending requests will appear and all requests from the **"trpd-spo-wp-profile"** package must be accepted to guarantee the proper functioning of the web part.


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The screenshot shows the SharePoint admin center interface. On the left is a navigation sidebar with options like Home, Sites, Policies, Settings, Content services, Migration, Reports, Advanced, API access (highlighted), More features, Customize navigation, and Show all. The main content area is titled "API access" and includes a sub-header "Manage access to Azure AD-secured APIs from SharePoint Framework components and scripts." Below this is a table with columns: API name, Package, Permission, and Last requested. The table shows a list of approved requests for Microsoft Graph, including permissions like Directory.Read.All, Directory.ReadWrite.All, Group.ReadWrite.All, Group.Read.All, GroupMember.Read.All, and User.Read.All.

API name	Package	Permission	Last requested
Pending requests (0)			
Approved requests (21)			
Organization-wide (21)			
Microsoft Graph	-	Directory.Read.All	-
Microsoft Graph	-	Directory.ReadWrite.All	-
Microsoft Graph	-	Group.ReadWrite.All	-
Microsoft Graph	-	Group.Read.All	-
Microsoft Graph	-	GroupMember.Read.All	-
Microsoft Graph	-	User.Read.All	-

Figure 5 - Grant API access

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5 WEB PART ADDITION

To add a web part to a SharePoint Online page, you must first edit the page.

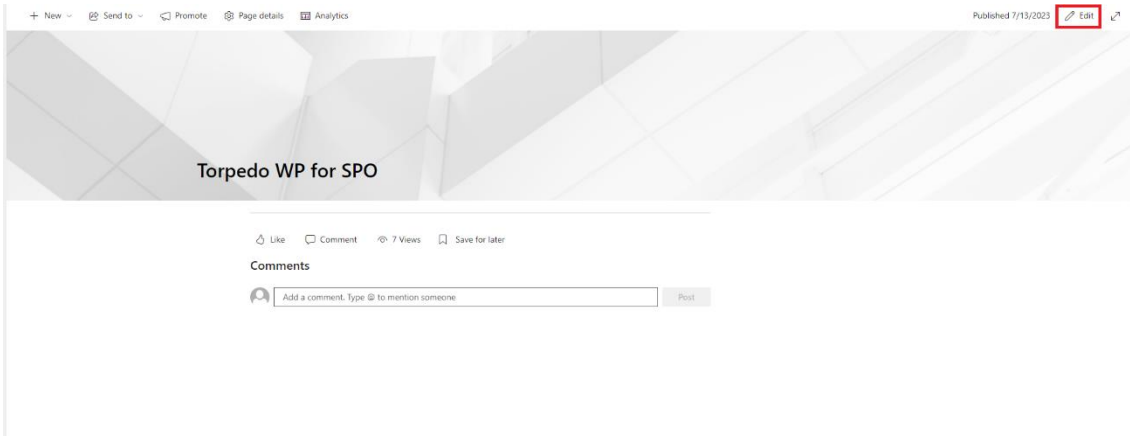


Figure 6 - Edit page in SharePoint Online

After editing the page it's possible to change sections, add or remove web parts. Add a one-column or full-width section as shown in the following figure.

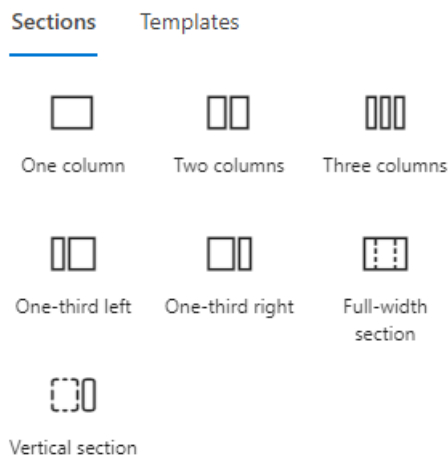



Figure 7 - Add one column section or full-width section in SharePoint Online

After adding the section, it's possible to include the **Insightful Profiles: a web part for SharePoint** within it.

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Still in page editing mode in SharePoint Online, it is possible to add web parts by clicking on the + button that appears in each section zone, as shown in the figure below.



Figure 8 - Button to add web parts

A popup will appear with all the web parts available for use in SharePoint Online. To add the **Insightful Profiles: a web part for SharePoint**, you can scroll through the list of options or filter the results by searching. Click on the web part to add it to the page.

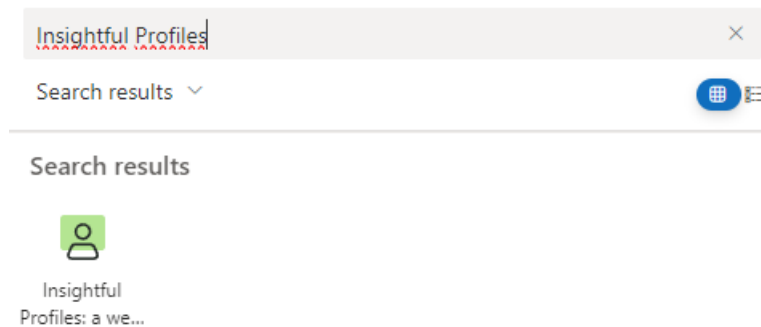



Figure 9 - Add Insightful Profiles: a web part for SharePoint

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6 WEB PART CONFIGURATION

To configure the web part, click on the option to edit the web part.

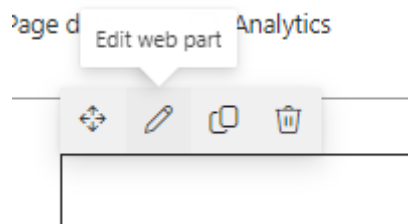


Figure 10 - Edit web part

Next, a right-side panel will appear with all configurable properties for the web part.

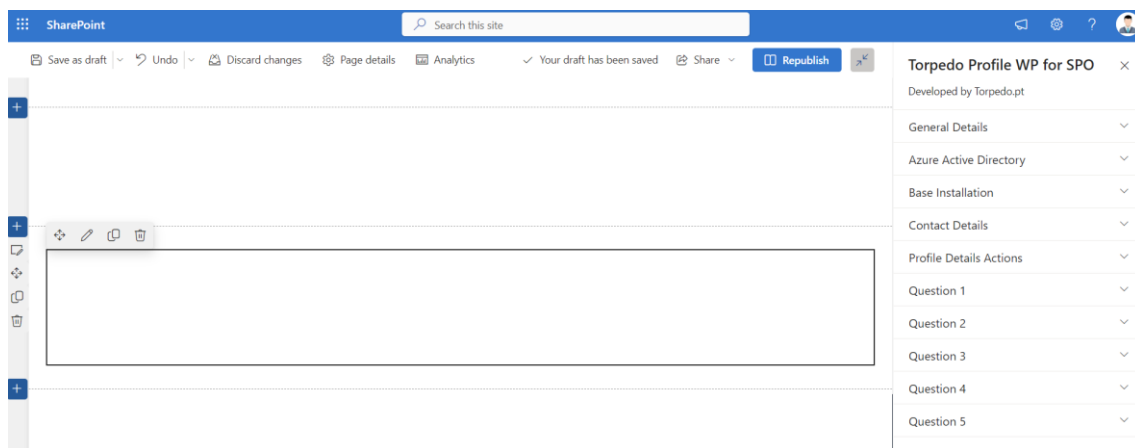



Figure 11 - Configure Insightful Profiles: a web part for SharePoint

The web part's properties panel is organized into fourteen groups, including General Details, Azure Active Directory, Base Installation, Contact Details, Profile Details Actions, Question 1/2/3/4/5/6/7/8, and Theme Colors.

In the **General Details** group, customize the web part's title.

For the **Azure Active Directory** group, configure the web part to utilize user information from Azure Active Directory (AAD). Specify the number of users for filtering, a crucial step for performance optimization, especially with substantial data volumes.

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In the **Base Installation** group, create necessary lists for proper functionality. Lists are automatically generated and assigned in corresponding groups upon selection.

Configure user information settings, including details, photos, and profile specifics in the **Contact Details** group.

In the **Profile Details Actions** group, customize question labels within each question group. Specify Torpedo Organizational Chart WP for SPO functionality and its URL.


Optionally configure web part colors in the **Theme Colors** panel for a tailored appearance.

For Azure Active Directory operation, configure question labels, access the **Profile Details Actions** group, and specify **Torpedo Organizational Chart WP for SPO** with its URL. Once completed, if color customization is not required in the "Theme Colors" panel, the web part is ready for use.

For **SharePoint Lists** operation, refrain from selecting the Active Directory operation option. Configure **Contact Details** and **Questions** sections. If necessary, lists are absent, use the **Base Installation** menu to create and automatically assign them to the relevant groups.


The **Contact Details** group contains settings related to user information, including details, photos, and profile specifics.

Once the republish button at the top of the page is pressed, the web part will render looking similar to the one shown below.

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People Directory Profile

 Edit



Francisco Ferreira
It
Porto

francisco@27c3xc.onmicrosoft.com
919191919
16/10

[Contact](#) [Share](#)

Biography

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Projects

[Project 1](#) [Project 2](#)

Skills

[Skill 4](#) [Skill 2](#) [Skill 3](#)

Expertise

[Ask me 1](#)

Schools and education

[School](#) [Education](#)


Interests and hobbies

[Interest](#) [Hobbies](#)

Figure 12 - Insightful Profiles: a web part for SharePoint

People Directory Profile

 Save



Francisco Ferreira
It
Porto

francisco@27c3xc.onmicrosoft.com
919191919
16/10

[Contact](#) [Share](#)

Biography

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Projects

Select ... [Add](#)

[X Project 1](#) [X Project 2](#)

Skills

Select ... [Add](#)

[X Skill 4](#) [X Skill 2](#) [X Skill 3](#)

Expertise


Select ... [Add](#)

[X Ask me 1](#)

Schools and education

Select ... [Add](#)

Figure 13 - Insightful Profiles: a web part for SharePoint (Edit Mode)

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It is possible to view the user's profile with all their details, biography, and interests. It is also possible to see individuals with similar interests. The editing mode is still available, allowing users to configure all their information in a simple and intuitive manner.