




ORGANIZATIONAL CHART ENTRA ID WEB PART FOR SHAREPOINT

TECHNICAL DOCUMENTATION

Torpedo – Serviços de Informática, Lda

Torpedo.pt
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	TECHNICAL DOCUMENTATION	Date: 20/06/2024
		Revision No.: 1.1.0.0

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1 DOCUMENT VERSION HISTORY

Table 1 - Name and Document Content

DOCUMENT NAME	CONTENT
trpd_wp_organizationalchartentraid_technicaldocumentation.pdf	Technical Documentation

1.1 VERSION HISTORY


Table 2 - Version History

VERSION HISTORY						
Nº.	AUTHOR	DATE	REVISIONED BY	DATE OF REVISION	APPROVED BY	APPROVAL DATE
1.0.0.0	Henrique Serafim	16/02/2024	Bruno Teixeira	16/02/2024	Bruno Teixeira	16/02/2024
1.0.0.3	Henrique Serafim	26/02/2024	Bruno Teixeira	26/02/2024	Bruno Teixeira	26/02/2024
1.0.0.4	Francisco Ferreira	28/03/2024	Bruno Teixeira	28/03/2024	Bruno Teixeira	28/03/2024
1.0.0.8	Francisco Ferreira	17/06/2024	Bruno Teixeira	17/06/2024	Bruno Teixeira	17/06/2024
1.1.0.0	Francisco Ferreira	20/06/2024	Bruno Teixeira	20/06/2024	Bruno Teixeira	20/06/2024


1.2 DISTRIBUTION

Table 3 - Distribution List

NAME	COMPANY	BOARD
trpd_wp_organizationalchartentraid_technicaldocumentation.pdf	Torpedo.pt	Marketplace

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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.

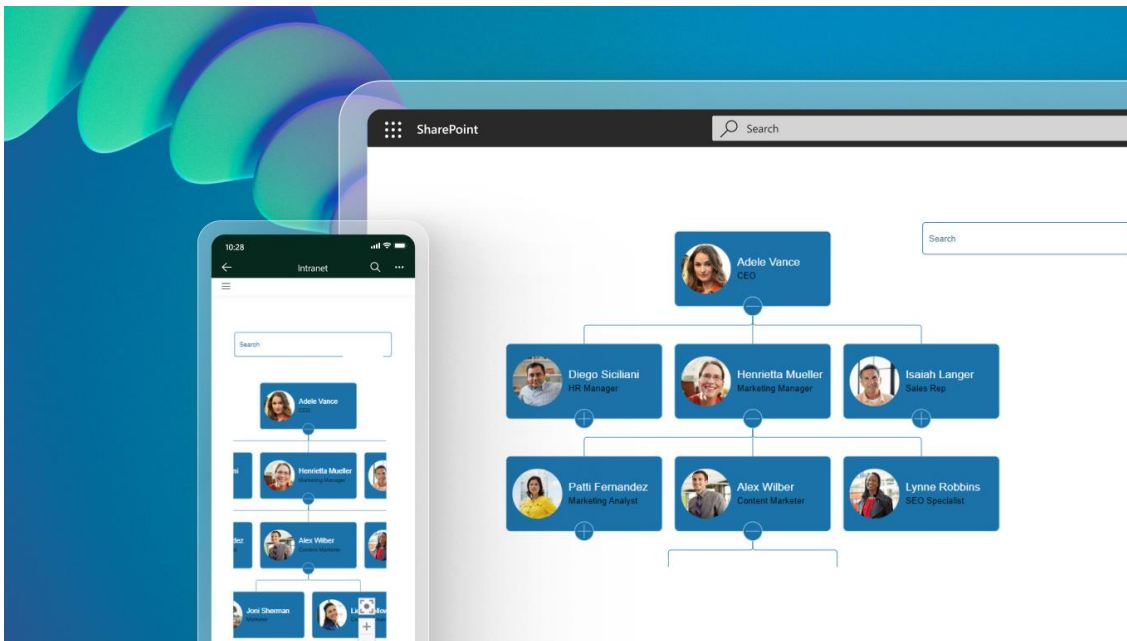



Figure 1 - Web Part teaser


2.2 BRIEF DESCRIPTION OF THE PRODUCT

The **Organizational Chart Entra ID Web Part for SharePoint** is a robust solution designed to visually represent organizational hierarchies within SharePoint environments. Leveraging Active Directory information, it provides users with a clear and intuitive display of reporting structures, facilitating effective communication and decision-making within organizations.

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2.2.1 KEY FEATURES

- **Dynamic Organizational Hierarchy:** Display direct managers and reports based on Active Directory data.
- **Customizable Layouts:** Choose from various layout options to suit organizational preferences.
- **Assistant Tag Configuration:** Adjust assistant tag placement for enhanced visualization.
- **Job Title Visibility Control:** Hide users without job titles to streamline chart focus.
- **Integration with Insightful Profiles Web Part for SharePoint:** Seamlessly connect with Insightful Profiles: a web part for SharePoint for access to individual profiles.
- **Expandable Direct Reports:** Easily expand direct reports to explore deeper into the hierarchy.
- **User Search Functionality:** Quickly locate specific users within the organizational chart.


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3 REQUIREMENTS

- **SharePoint Online Environment:** Requires access to SharePoint Online environment.
- **Administrator Privileges:** Installation and configuration may require administrative access.
- **Organizational Chart Entra ID Web Part for SharePoint Package:** Obtain the web part package from the provider.

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4 INSTALLATION

- 1 - **Download Package:** Obtain the Organizational Chart Entra ID Web Part for SharePoint package from the provider.
- 2 - **Upload to SharePoint:** Upload the package to the appropriate location within SharePoint Online.

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



Figure 2 - Add SharePoint App

Add the ".sppkg" file to be installed.

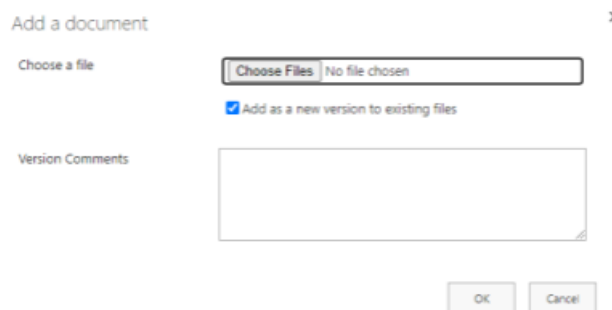



Figure 3 - Add ".sppkg" file to be installed

Enable the application to be available to all sites.

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Do you trust Organizational Chart Entra ID 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.



This client side solution will get content from the Organizational Chart Entra ID Web Part for SharePoint 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, User.ReadBasic.All

Deploy
Cancel

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

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5 WEB PART ADDITION

- 1 - Edit Page:** Navigate to the SharePoint page where the web part will be added and enter edit mode.




Figure 5 - Edit page in SharePoint Online

- 2 - Insert Web Part:** Locate the web part insertion point on the page.





Figure 6 - Add webpart


- 3 - Add Organizational Chart Entra ID Web Part for SharePoint:** Select the Organizational Chart Entra ID Web Part for SharePoint from the web part gallery.

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Q Organizational Chart Entra ID ×


Search results ▾  

Search results



Organizational
Chart Entra ID...

Figure 7 - Add Organizational Chart Entra ID Web Part for SharePoint

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6 WEB PART CONFIGURATION

By default the webpart will show the current logged user organization chart (manager if it exists, the other users that report to the same manager and direct reports for each us).

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

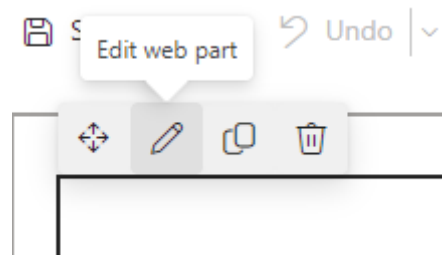


Figure 8 - Edit web part

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

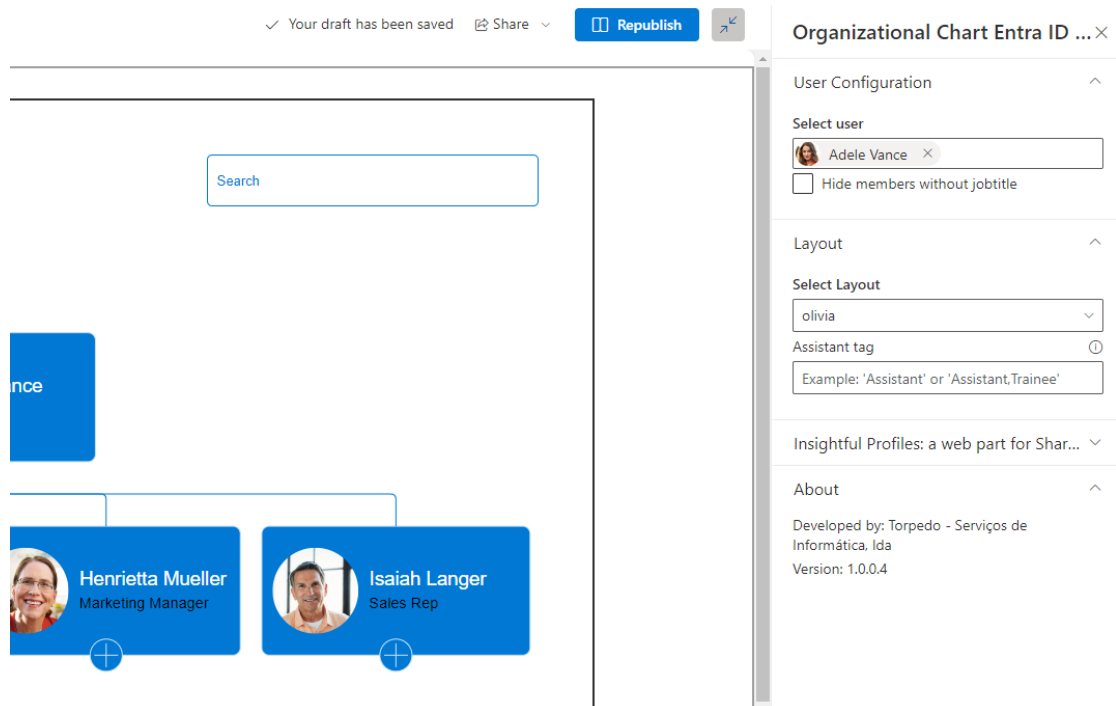



Figure 9 - Configure Organizational Chart Entra ID Web Part for SharePoint

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6.1 USER CONFIGURATION

In the “User Configuration” group you can:

- Select a user to display the organization chart (usually the CEO or leave it blank to display the current user organizational chart);
- Hide users without jobtitles (this is useful to hide active directory accounts used for IT administration).

6.2 LAYOUT

6.2.1 SELECT LAYOUT

By default, you have selected layout “ana” but you can choose from a variety of layouts available. They will automatically inherit the SharePoint theme.

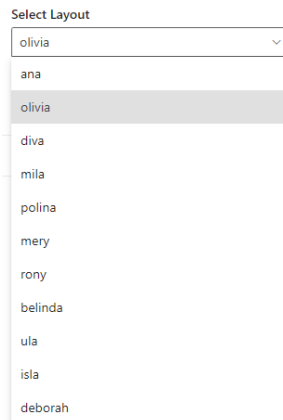



Figure 10 - Available layouts

6.2.2 ASSISTANT TAG

Here you can define if the assistants/trainees are going to be displayed in the same level as the other report users or if they must be at a middle level. This field looks at the job title, for example a “Administrative Executive Assistant” that reports to the CEO and it also allows multiple tags for multiple job denominations (example: Assistant, Trainee..)

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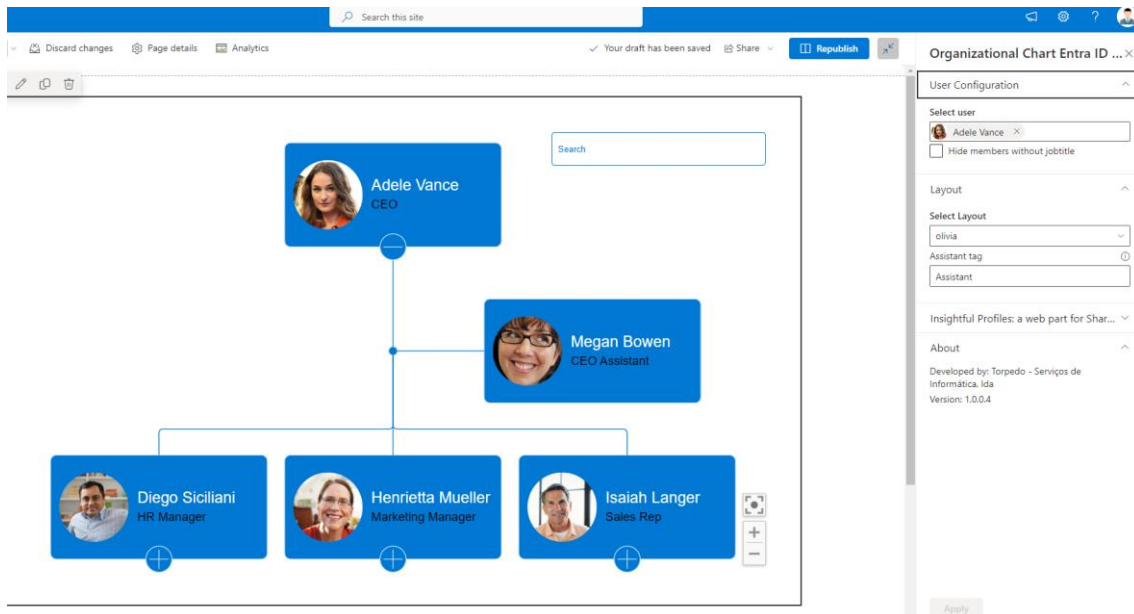


Figure 11 - Assistant tag

6.2.3 INSIGHTFUL PROFILES: A WEB PART FOR SHAREPOINT

In case you have the Insightful Profiles: a web part for SharePoint you can add the link of where the webpart is installed and create the communication between the applications with a click in the user card. The user will be redirected to the page and the profile of the clicked user will be shown.