




ORGANIZATIONAL CHART ENTRA ID WEB PART FOR SHAREPOINT

TECHNICAL DOCUMENTATION

Torpedo – Serviços de Informática, Lda

Torpedo.pt
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	TECHNICAL DOCUMENTATION	Date: 17/06/2024
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1 DOCUMENT VERSION HISTORY

Table 1 - Name and Document Content

DOCUMENT NAME	CONTENT
trpd_spo_organizationalchartsplist_technicaldocumentation.pdf	Technical Documentation

1.1 VERSION HISTORY


Table 2 - Version History

VERSION HISTORY						
Nº.	AUTHOR	DATE	REVISIO NED BY	DATE OF REVISION	APPROVE D BY	APPROVAL DATE
1.0.0.8	Francisco Ferreira	15/04 /2024	Bruno Teixeira	15/04/2024	Bruno Teixeira	15/04/2024
1.0.0.11	Francisco Ferreira	17/06 /2024	Bruno Teixeira	17/06/2024	Bruno Teixeira	17/06/2024


1.2 DISTRIBUTION

Table 3 - Distribution List

NAME	COMPANY	BOARD
trpd_spo_organizationalchartsplist_technicaldocu mentation.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.

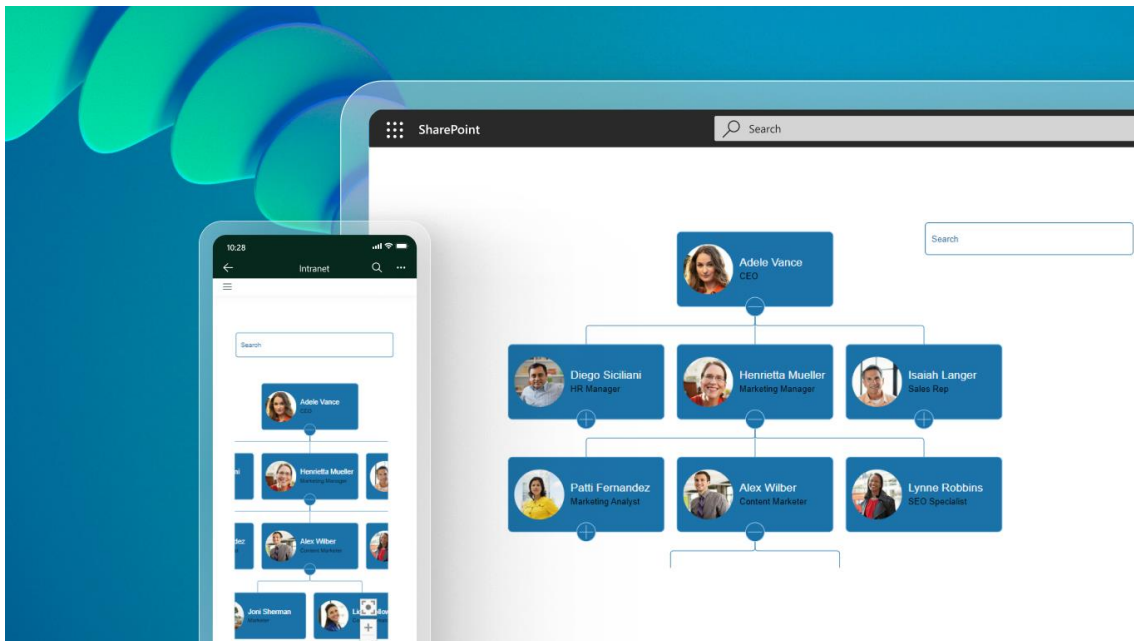



Figure 1 - Web Part teaser

2.2 BRIEF DESCRIPTION OF THE PRODUCT


The **Organizational Chart SPList Web Part for SharePoint** is a powerful solution developed for SharePoint, offering a dynamic and intuitive visual representation of your company's organizational structure. Leveraging SharePoint list information 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

- **Direct Managers Identification:** Quickly discover the direct managers of each user, simplifying understanding of the chain of command and hierarchical structure.
- **Variety of Customizable Layouts:** Choose from various layout options to suit organizational preferences.
- **Assistance Tags for Enhanced Understanding:** Utilize assistance tags to provide additional and contextual information, making org chart comprehension easier for all users.
- **Display of Job Titles:** Display job titles of each employee directly on the org chart, making it easier to identify roles and responsibilities.
- **Integration with Insightful Profiles Web Part for SharePoint:** Seamlessly connect with Insightful Profiles: a web part for SharePoint to access 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.

The **Organizational Chart SPList Web Part for SharePoint** is an indispensable tool for simplifying the visualization and understanding of organizational structure within your company. With a variety of advanced features and seamless integration with SharePoint, this solution provides an intuitive and efficient experience for human resources management.

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3 REQUIREMENTS

For the correct functioning of the **Organizational Chart SPList for SharePoint**, the following requirements are necessary:

- Microsoft SharePoint Online;
- Organization Structure List

Table 4 - Organization Structure list columns and data types

COLUMN	TYPE
Title	Single Line of Text (Required)
Name	Single Line of Text (Required)
UserID	Single Line of Text (Required)
ManagerID	Single Line of Text
Email	Single Line of Text (Required)
Department	Single Line of Text (Required)
JobTitle	Single Line of Text (Required)
ProfileImage	Thumbnail
Modified	Date and Time
Created	Date and Time
CreatedBy	Person or Group
ModifiedBy	Person or Group

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


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Table 5 - 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

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

Table 6 - 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

- 1 - **Download Package:** Obtain the **Organizational Chart SPList 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.

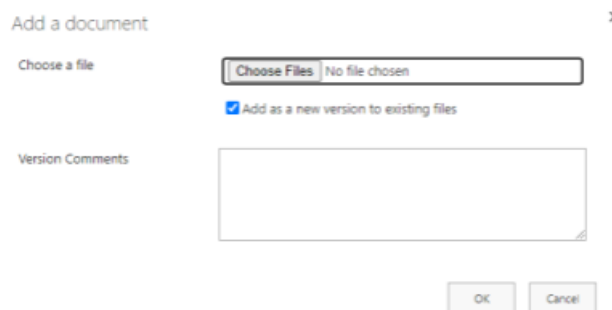



Figure 3 - Add ".sppkg" file to be installed

Enable the application to be available to all sites.

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Do you trust Organizational Chart SPList 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 following domains:

Organizational Chart SPList Web Part for SharePoint


SharePoint Online

Make this solution available to all sites in the organization

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 SPList Web Part for SharePoint:** Select the Organizational Chart SPList Web Part for SharePoint from the web part gallery.

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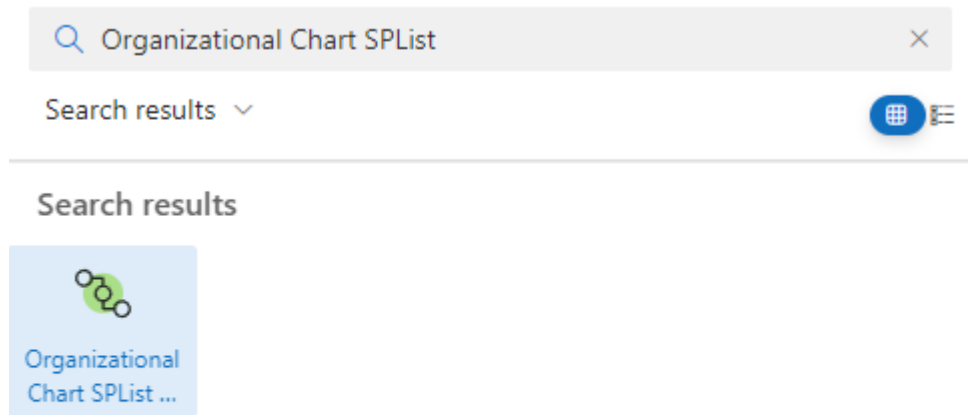



Figure 7 - Add Organizational SPList Web Part for SharePoint

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6 WEB PART CONFIGURATION

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

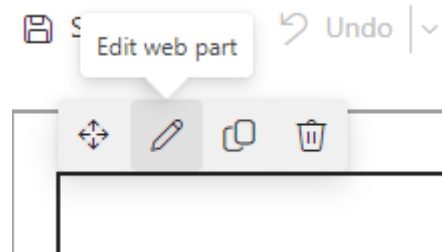


Figure 8 - Edit web part

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

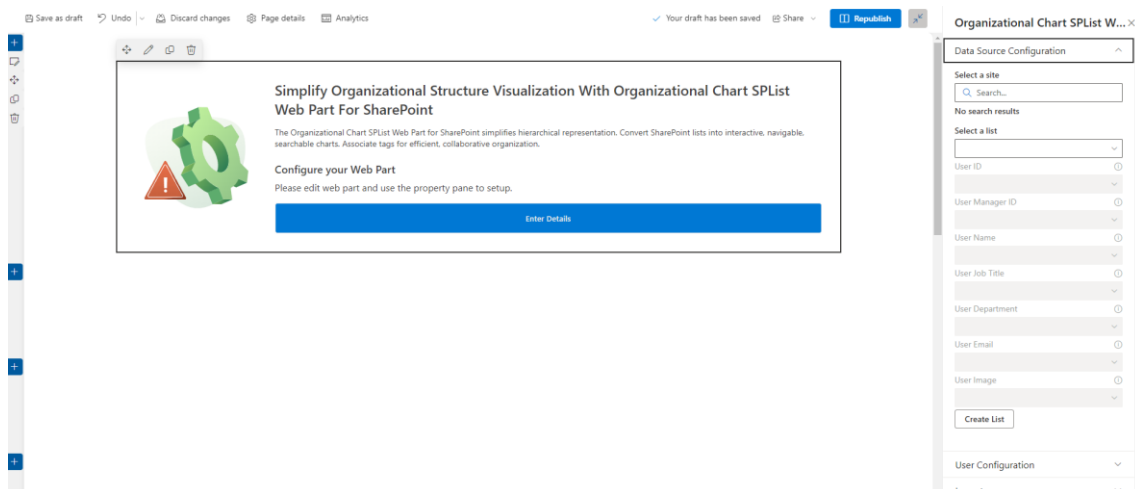



Figure 9 - Configure Organizational Chart SPLIST Web Part for SharePoint

6.1 DATA SOURCE CONFIGURATION

Through this group, it's possible to specify the data source of the organizational chart. It's thus possible to select the SharePoint site and list that contains the organizational chart information. It's also necessary to map all the fields of the list, and there's the possibility of creating a default list with all the necessary fields for the web part to function. If you don't want to, it's not necessary to create a

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default list; you can use your own, as long as the column data types match the requirements.

6.2 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 general organizational chart for the entire organization);
- Hide users without job titles.

6.3 LAYOUT

6.3.1 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

6.3.2 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

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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..)

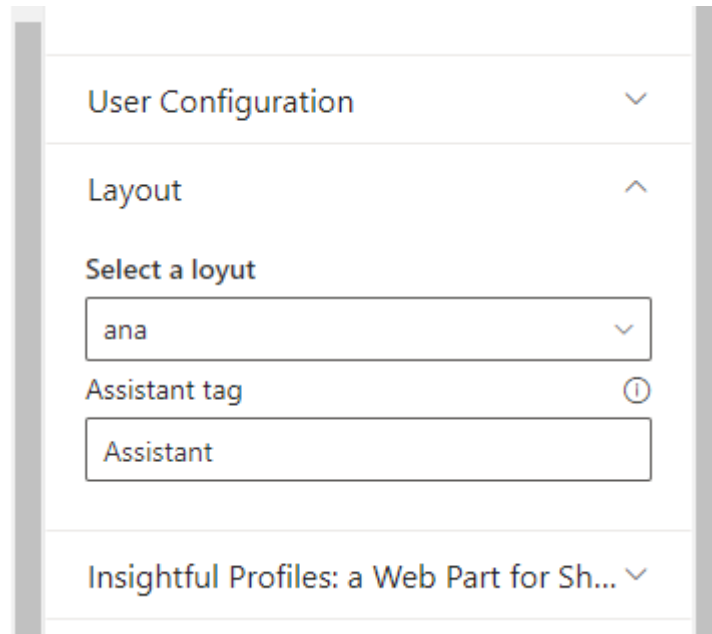


Figure 11 - Assistant tag

6.3.3 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.