PENTHARA
TECHNOLOGIES

USER GUIDE

Penthara Org Chart for Microsoft Teams – User Guide.

Microsoft
Solutions Partner

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Penthara Org chart for Microsoft Teams

Penthara Organization Chart for Microsoft Teams is a custom-built App for Microsoft Teams that works in conjunction with SharePoint App. Penthara Org Chart for SharePoint needs to be installed as a pre-requisite from SharePoint Store to be able to use Penthara Org Chart for Microsoft Teams App in Microsoft Teams.

This app comes with a host of new features like Advanced Search, Custom SharePoint User Profile Attributes, Azure Active Directory Extended Attributes and much more. This app supports Microsoft Teams, outlook and Microsoft 365 hubs.

Pre-Requisites

To be able to consume Penthara Org Chart for Microsoft Teams, please ensure that the below pre-requisites are met. After you have verified that the pre-requisites have been met, only then begin with the installation of Penthara Org Chart for Microsoft Teams.

- SharePoint Service Admin Permissions on Microsoft 365 Tenant.
- Install Penthara Org Chart for SharePoint from SharePoint Store.
- Grant API Permissions via SharePoint Admin Center.

Installation Instructions

To use Penthara Org chart for Microsoft Teams, you need to ensure that all the pre-requisites listed above are met.

Install Penthara Org Chart for SharePoint

Follow the below steps to obtain and install Penthara Org Chart for SharePoint on in your tenant:

1. Navigate to **SharePoint Admin Center**.
2. Click on **More features** option on the left panel and then click on **Open** button in the **Apps** Section.
3. You will be taken to **SharePoint App Catalog**. From the SharePoint App Catalog, click on **SharePoint Store** on the left Panel.
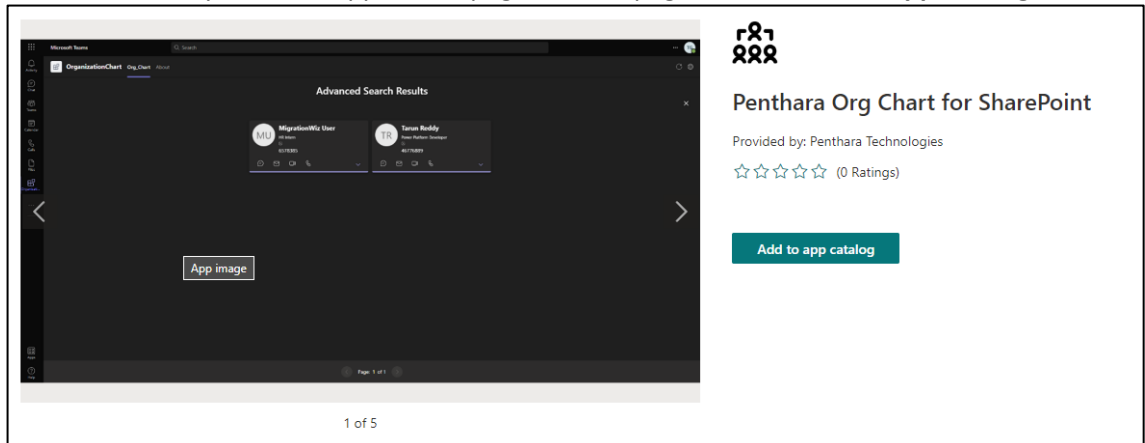4. You will be taken to **SharePoint Store**. You will see a search box on the top right of the store.
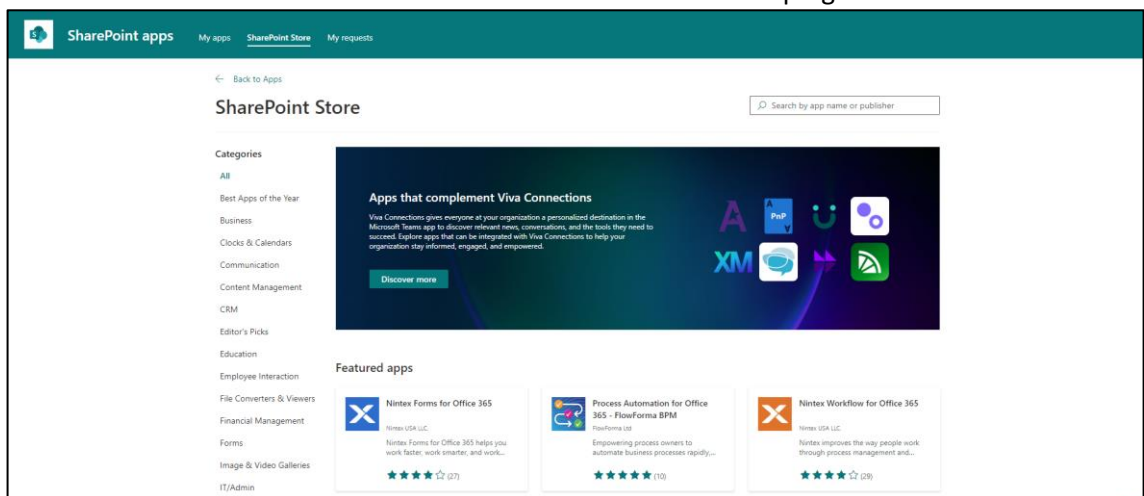
5. Search for "**Penthara**" in the search box.

6. From the results that you get, select **Penthara Org Chart for SharePoint** tile.
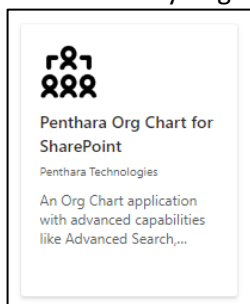
7. Clicking the tile will take you to the app details page. On this page, click on **Add to app catalog**.

8. On clicking **Add to app catalog**, you will be presented with the **Confirm Data Access** dialog box. This box explains what permissions are required for the app to function.
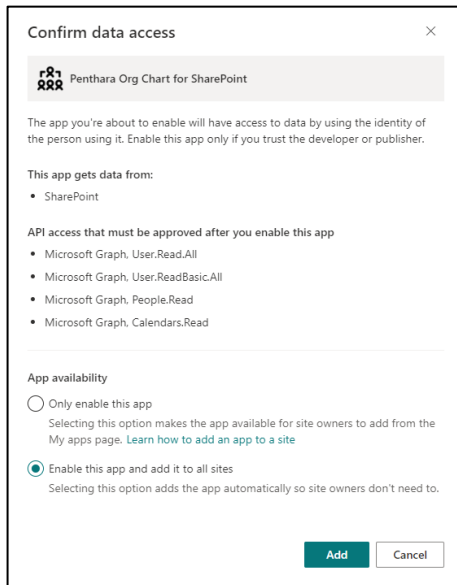
9. From the **App Availability** section, select the desired option and click **Add**.

10. After clicking the **Add** button, you will be presented with **Approve Access so this app works as designed** dialog box.
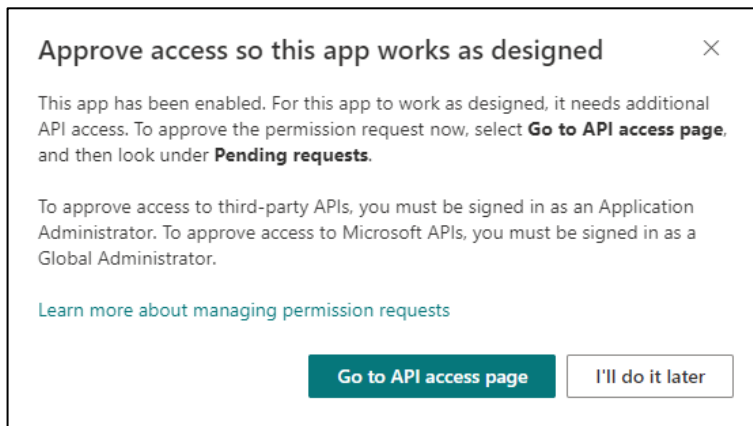
11. Click on **Go to API access page** button. You will be taken to the **API Access** page in the SharePoint App Catalog.
    Note: **This is a Critical step. If this step is skipped, the app will not work at all.**

12. Please ensure you **approve 5 permissions** that are listed under pending requests section. In case there are more than 5 listed, you just need to approve the ones listed above.
Note: <u>This is a Critical step. If this step is skipped, the app will not work at all.</u>

13. After you are done approving the requests, the **API Access** section will look like this.
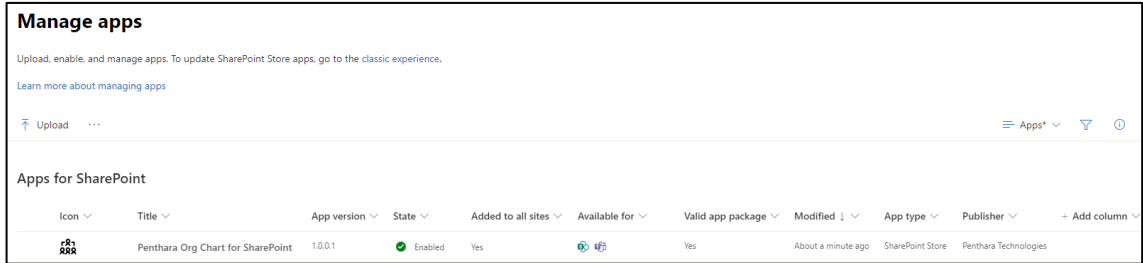
14. Navigate back to **SharePoint App Catalog** that you opened in Step 2 above and click on **Manage App** option on the left panel. An entry on this page under **Apps for SharePoint** section confirm addition of app to SharePoint App Catalog.
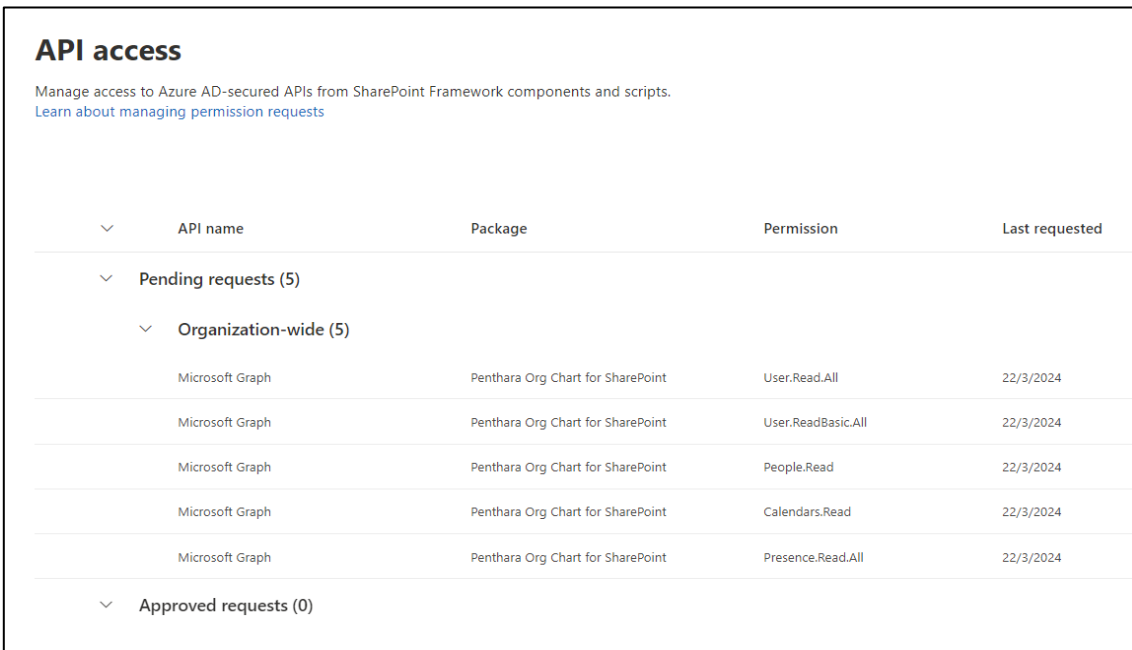
Icon	Title	App version	State	Added to all sites	Available for	Valid app package	Modified ↓	App type	Publisher	+ Add column
⚏	Penthara Org Chart for SharePoint	1.0.0.1	✅ Enabled	Yes	🖿 🖿	Yes	About a minute ago	SharePoint Store	Penthara Technologies	

15. Check the following parameters of the entry **to confirm a successful installation**:
    a. State = Enabled
    b. Added to All Sites: Yes/No (based on the decision you made in Step 9).
    c. Available for: SharePoint, Microsoft Teams (logos visible)
    d. Valid App Package = Yes

Grant API Permissions

Below steps explicitly outline the process that needs to be followed to grant API Access to required permissions:

1. Navigate **to SharePoint App Catalog**. Refer to Step 1 & 2 in [Install Penthara Org Chart for SharePoint](#) section.
2. Click on **API Access** page in the SharePoint App Catalog.

API access

Manage access to Azure AD-secured APIs from SharePoint Framework components and scripts.
Learn about managing permission requests

	API name	Package	Permission	Last requested
⌄	**Pending requests (5)**			
⌄	Organization-wide (5)			
	Microsoft Graph	Penthara Org Chart for SharePoint	User.Read.All	22/3/2024
	Microsoft Graph	Penthara Org Chart for SharePoint	User.ReadBasic.All	22/3/2024
	Microsoft Graph	Penthara Org Chart for SharePoint	People.Read	22/3/2024
	Microsoft Graph	Penthara Org Chart for SharePoint	Calendars.Read	22/3/2024
	Microsoft Graph	Penthara Org Chart for SharePoint	Presence.Read.All	22/3/2024
⌄	Approved requests (0)			

3. Please ensure you **approve 5 permissions** that will be listed under pending requests section. In case there are more than 5 listed, you just need to approve the ones listed above.

4. After you are done approving the requests, the **API Access** section will look like this

Install Penthara Org Chart for Microsoft Teams

Penthara Org Chart for Microsoft Teams is available on the Teams Store, below instructions have outlined the process of installation.

Please follow the below instructions to install **Penthara Org Chart for Microsoft Teams**:

1. Launch Microsoft Teams Application or login to Microsoft Teams Web interface.
2. From the left panel of Microsoft Teams, click on the ellipses and then click on **More Apps**.
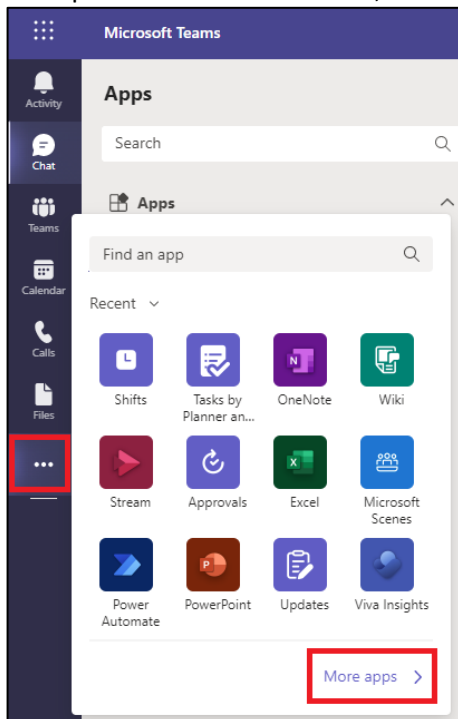
3. You will be taken to Team Store. On this screen, click on **Manage your apps** option that is visible on the bottom of the left panel.
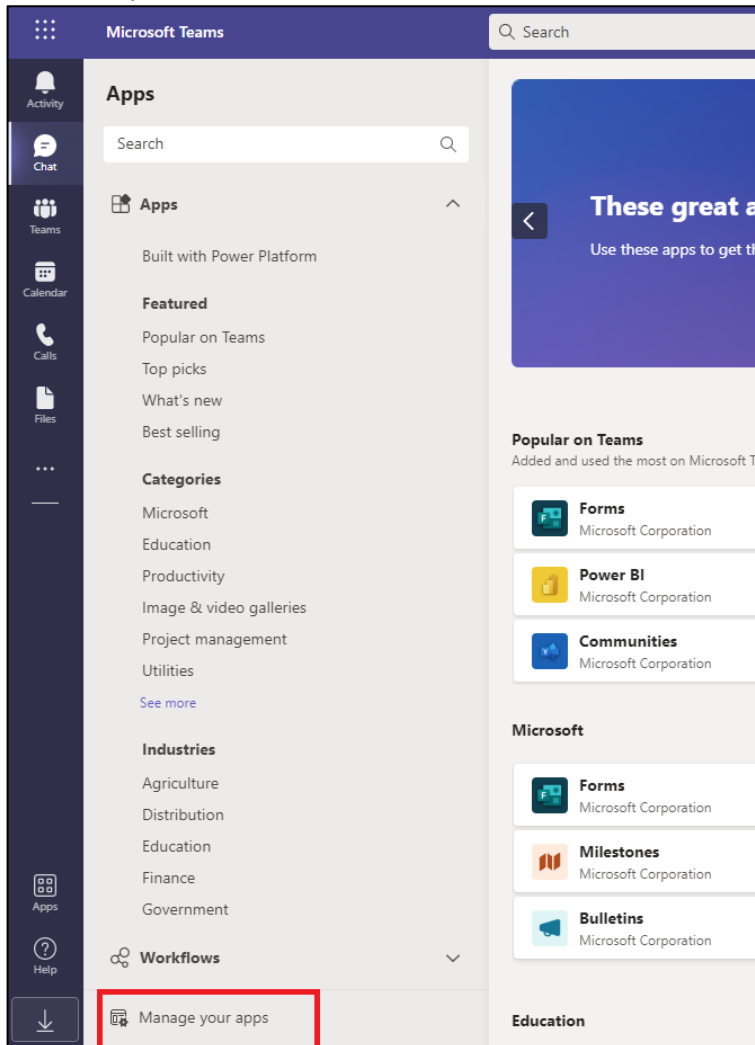
4. From the **Manage your Apps** screen, Search for "**Penthara**" in the search box.
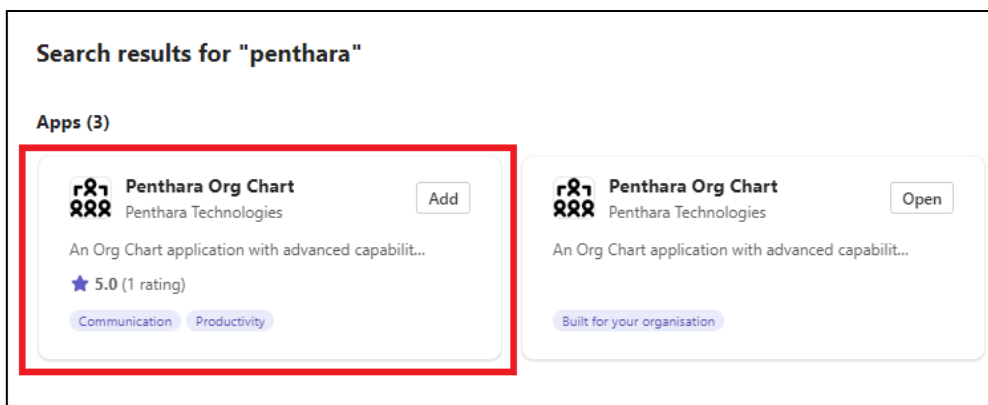
5. You will be presented with two of the above options. From there choose the highlighted one.
6. Select the app and click **Add**.

7. After you click Add button, you will be presented with **Penthara Org Chart** dialog box in Microsoft Teams.
8. Review the **Overview** and **Permissions** sections of the dialog box and click **Add** button to add the app to Microsoft Teams.
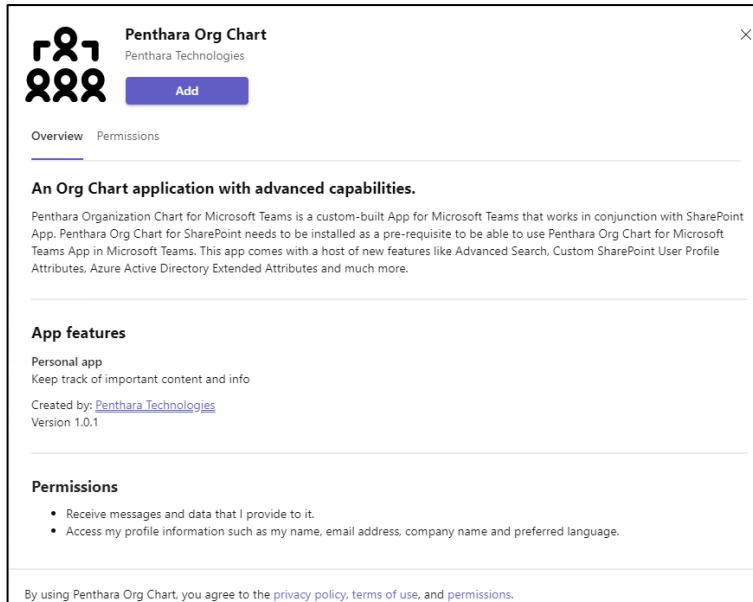
9. After you click the Add button, you will be taken to the App page. You will also see the app in the left panel of Microsoft Teams.
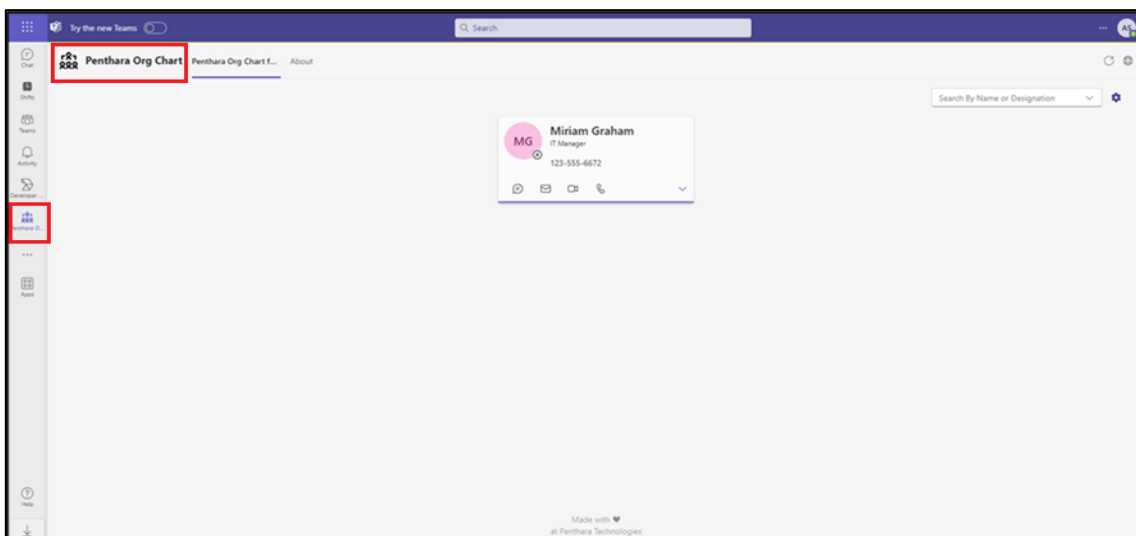
Usage References

How to create custom User Profile Properties in SharePoint Online?

[Add and edit user profile properties in SharePoint - SharePoint in Microsoft 365 | Microsoft Docs](#)

How to update Azure AD Extended Attributes via Graph Explorer?

1. Navigate to [Graph Explorer](#) and login with a Global Admin account.
2. On first login, you will be required to grant a consent to **Microsoft Graph Explorer** on behalf of the organization.

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4. Once logged in, you need to consent the **User.ReadWrite.All** permission in the **Modify permissions (Preview)** tab of the Graph Explorer.
5. You then need to use the **Get user by email** query.
6. Ensure you are selecting the **beta version** from the dropdown and that you are replacing the **{user-email}** string with the email ID of the user to get user properties.
7. You then need to replace the **get** method with the **patch** method to update user attributes. Ensure you are passing the values in double quotes ("###").

    Sample of **Request Body**:
```
{
    "onPremisesExtensionAttributes":
    {
        "extensionAttribute1": null,
        "extensionAttribute2": null,
        "extensionAttribute3": null,
        "extensionAttribute4": null,
        "extensionAttribute5": null
    }
}
```
8. Repeat step 5 to confirm successful patch.

Custom SharePoint Properties in Admin Settings Panel

In the **Admin Settings Panel** of Penthara Org Chart for Microsoft Teams, there are three sections:

- **Pre-Defined Azure Properties**:
  - These are the default user profile properties of a user that exists in the tenant's directory. We are consuming these properties from Azure Active Directory.

- **Extended Azure Properties**:
  - These attributes exist in the environment by default but do not have any data populated. As you can understand by the name, these are Extended attributes which signify that these attributes can be used to extend user profile attributes over and above the default ones.

- **SharePoint Properties**:
  - The SharePoint Properties section not only lists the default User Profile Properties but also lists the Custom SharePoint User Profile Properties.
  - You will see an input field next to a few SharePoint Properties. This will only show up for Custom User Profile Property attribute and will not be visible for the default properties.
  - Though there is no compulsion on fill the field, however adding a value to it has its own advantages.
  - Considering you have two choices; to provide a value and to not provide a value, we have listed the outcome for both below:
    - Fill in the input field with a value:
      - If you add the name of the **Managed Property** (as-is) to which the custom user profile property is mapped to, you will be able to consume this property in Advanced Search.
    - Leave the input field blank or supply random value:
      - If you decide to leave the input field blank, the field will show data for a user in the people card, but you will not be able to use it to search a user via the advanced search page.
      - If you add a random value to the field, then the field will be visible in the people card as well as advanced search. Though it will show data for a user in the people card, you cannot use it to search a user via the advanced search page.
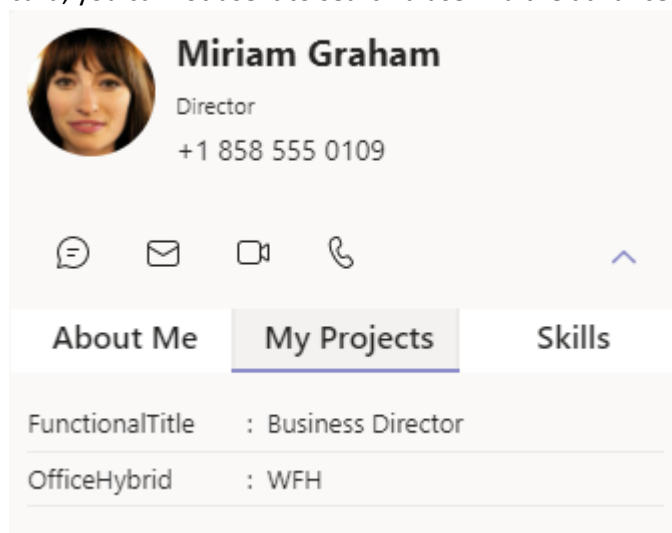
Here we can see that the property is available in person. Still, OfficeHybrid was not given any value in the "mapped property" input field, so this property will not be available for search in advance search.
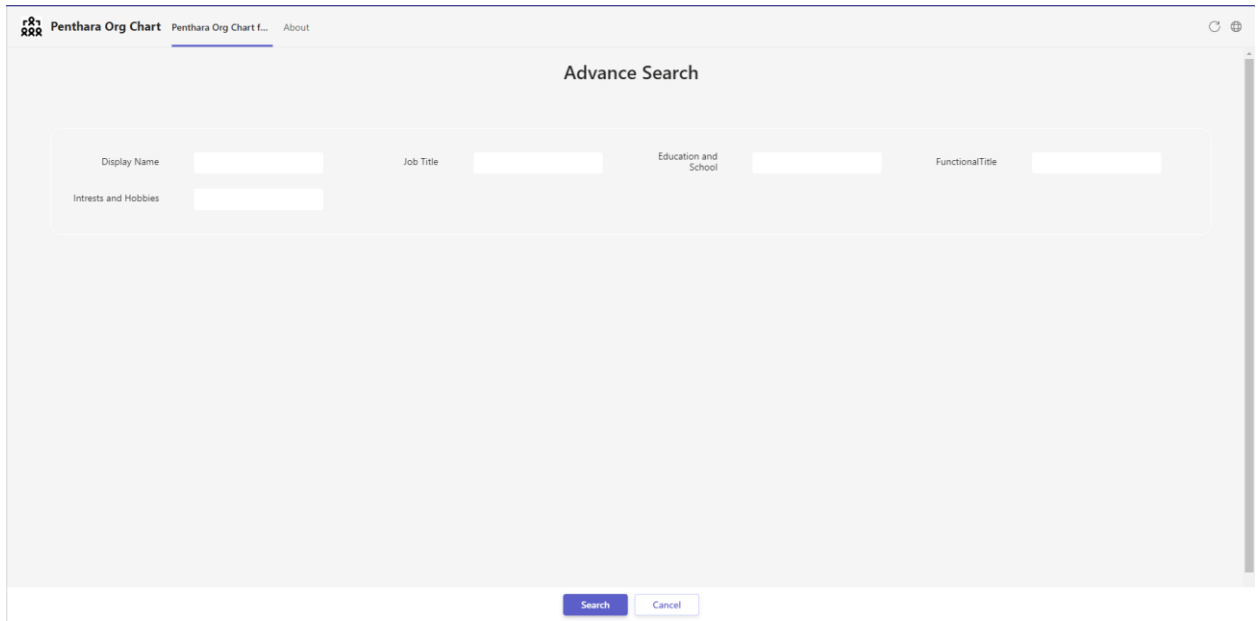
Now we will look into creating a custom SharePoint user profile property and mapping it to a managed property.

Creating Custom SharePoint Properties

1. Go to SharePoint Admin center. Click on the "More Features" option in the left pane.
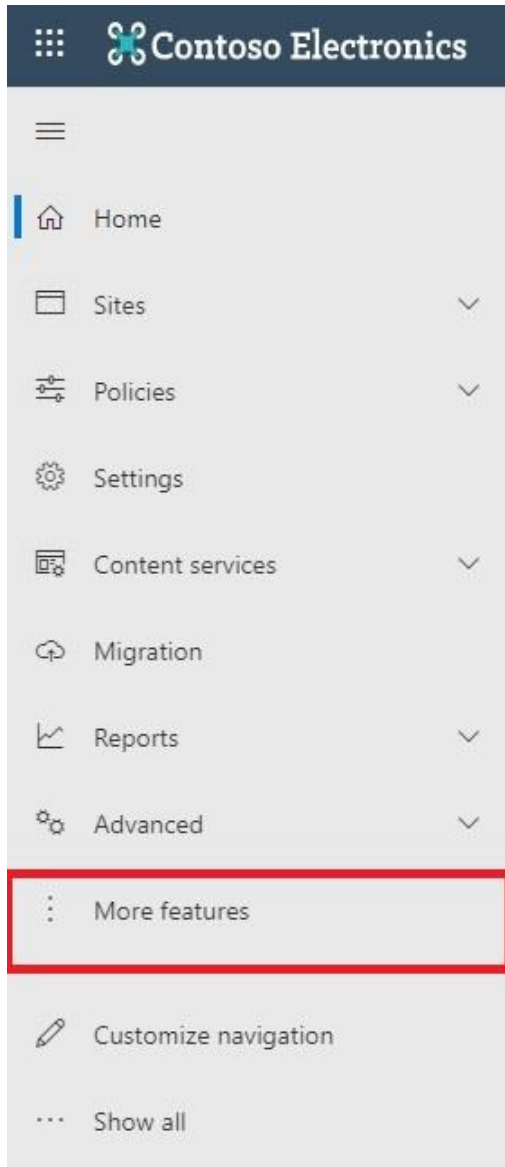
2. Click on the "User Profiles" option.

3. Click on "Manage User Properties" under the People menu.

4. Here, we can see all the user profile properties. To create new SharePoint custom user profile property, click on the "New Property" in the ribbon menu.

5. Now, fill in the new SharePoint custom property details. Few things to keep in mind
   a. Name property is the value we will see in the Org Chart, not the "Display Name."

b. Right now, Penthara Organization Chart only supports the following data types.

c. Penthara Organization Chart can show all these property values in the Person Card in Org Chart. **But the properties marked with "Green Square" are the ones that can be used for advanced search right now.**

d. While filling the form for SharePoint custom User Profile Properties, we will come to a section named "Policy Settings" here, we see two options: -

    i.   Policy Setting: -

        1.   This property is responsible for validating the field, whether required or optional.

    ii.   Default Policy Setting:

        1.   This property is responsible for the visibility of this property to other users. To use this SharePoint User Profile Property in Penthara Organization Chart for

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Microsoft Teams, **this option should be set to "Everyone."** When this property is set to "EveryOne," other users can also see this property of a specific user.

Policy Settings

Specify the privacy policy you want applied to this property. Select the Replicate check box if you want the property to display in the user info list for all sites. To replicate properties, the default privacy must be set to Everyone and the User can override check box must not be selected.

Policy Setting:
Required ▾

Default Privacy Setting:
Everyone ▾
☐ User can override
☐ Replicable

6. After filling in all the details, click on the "OK" button in the bottom right corner. This property will be saved.
7. We have created a SharePoint custom user profile property.
   Note: - Penthara Organization Chart cannot do the search query on parameters containing special characters in it.
8. Before going to the next step, ensure that at least one user has value for this SharePoint custom user profile property. This is required for these properties to get crawled and be available for mapping in the next step.

Mapping Custom SharePoint Properties to Managed Properties

1. Go to SharePoint Admin Center once again. Click on the "More Features" option in the left pane.
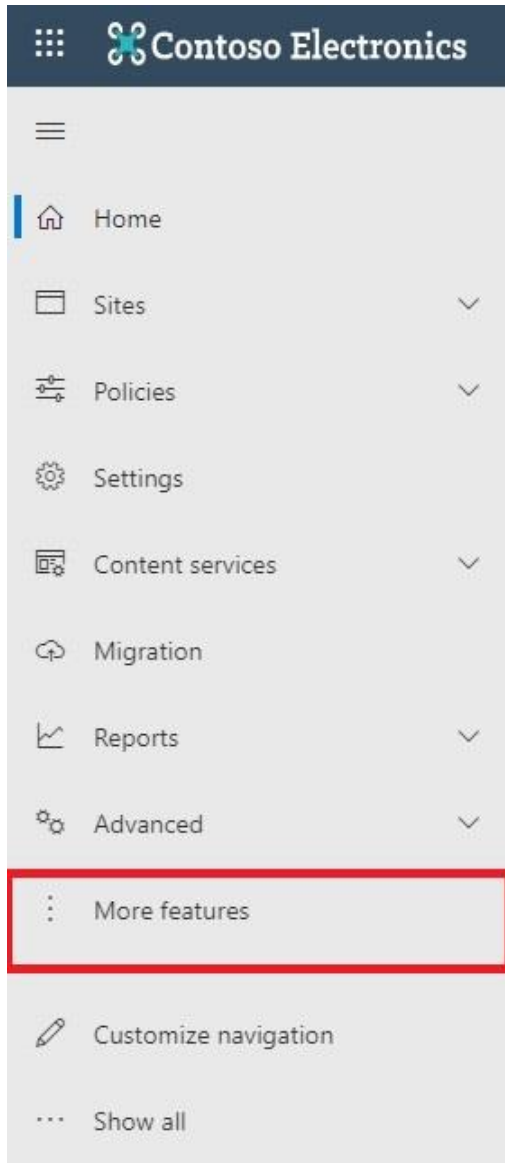
2. Click on the "Search" option.

3. Click on "Manage Search Schema."

4. Click on "New Managed Property."

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5. Fill in the details about the new Managed Property. Key steps to follow:
   a. Check the "Searchable," "Queryable," and "Retrievable" checkboxes.
   b. Click on Advanced Searchable Settings. Now change the value of "Full-text index" from "default" to "PeopleIdx." Scroll down and click on "Save."

6. Scroll down and click "Save" in the bottom right corner.

7. We created a new managed property. This property name will go in the input field adjacent to the SharePoint custom property in the Admin Settings Panel in Penthara Organization Chart.

8. Now, we will go to the crawled properties section. Click on the crawled properties option.
   Crawled properties are the SharePoint custom properties that are shuffled and can be searched, but for them to be searched, they need to be mapped to a managed property.

9. It takes about 24 hours to get the SharePoint Custom User Profile Properties to get crawled from their creation time provided, that the SharePoint Custom User Profile Property is being populated for at least one user.

10. Search the property that you created in SharePoint Custom properties. The property name will be prefixed with "People." This is a category of property. In our case, it is the "People" category.

11. Click on the SharePoint Custom property we created to map it to the new managed property.

12. Click on "Add a Mapping."
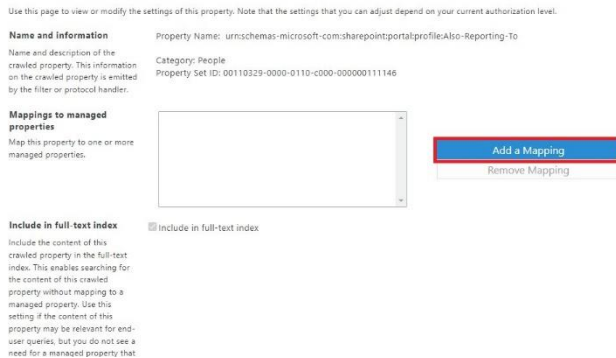
13. Search for the newly managed property we created, click on it, and click on "OK."
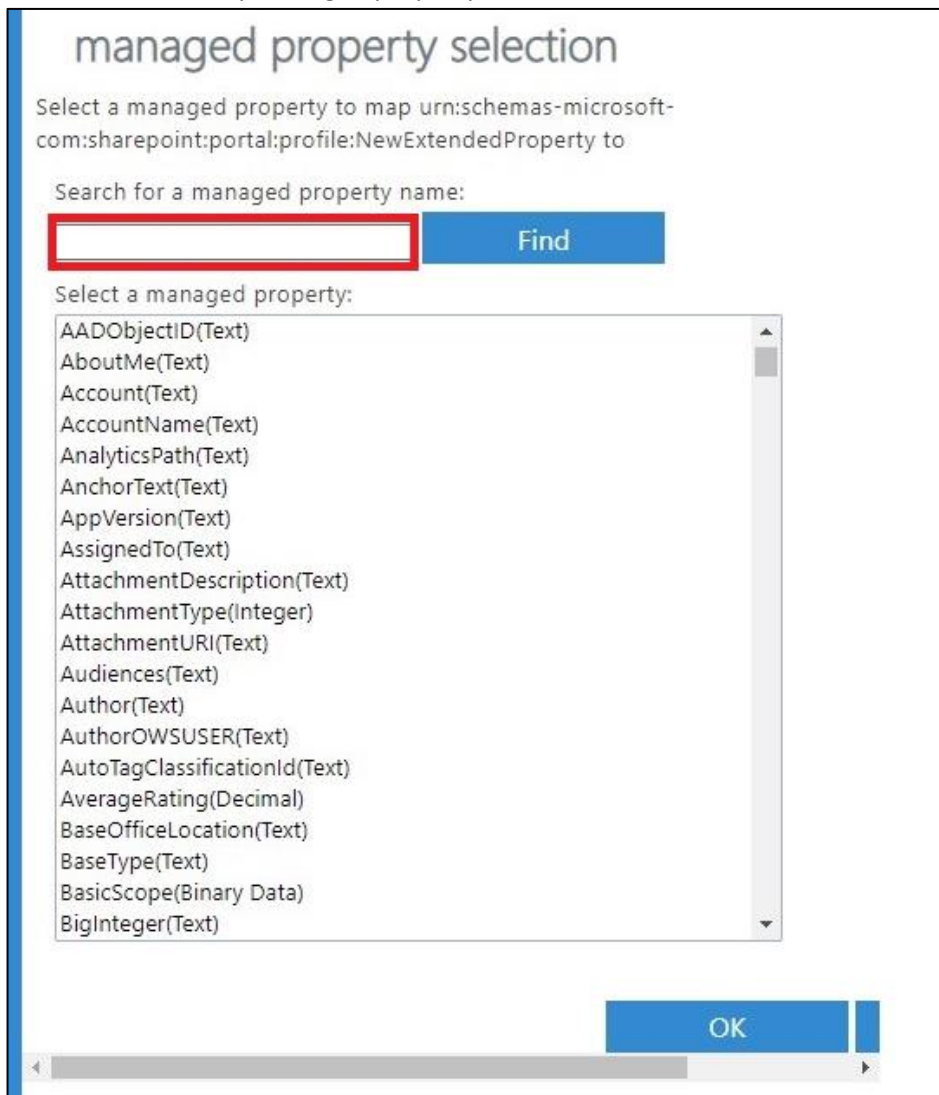
14. Scroll down and click on "OK."
15. This crawled property will take 24 hours to get mapped to the managed property.
16. It will take another 24 hours for the users to appear in the search results. This time is not fixed. It depends on how large the user database is.

17. Once the crawled property is mapped to the managed property, you will be able to see results in the advanced search in Penthara Organization Chart for Microsoft Teams.

Mobile Application Functionalities

Penthara Org Chart for Teams and SharePoint both will have the following functionalities:

- **Org Chart screen**: Org Chart will be presented in the Mobile application of the app.
- **Search**: The search functionality will be presented in the mobile application where user can search based on Name or Designation of any user.
- **People's Card**: The expandable and collapsible People's card will be presented as it is, so that the user can see different properties about any user.

Note: The Admin Settings and Advanced Search will only be presented in the Desktop App version.

Conclusion

We have created a SharePoint custom User Profile property and mapped it to a Managed Property so we can search for a user based on that SharePoint custom user profile property. We mapped this property to managed property because we cannot directly search a user based on SharePoint user profile property. Keep in mind that it takes 24 hours(approx.) for the properties to get crawled, and then it will take another 24 hours to get those properties mapped to the managed property and be available for searching a user based on that.