

USER GUIDE

Penthara Org Chart for Microsoft Teams – User Guide.







FENTHARA TECHNOLOGIES



CONTENTS

Penthara Org chart for Microsoft Teams	2
Pre-Requisites	2
Installation Instructions	2
Install Penthara Org Chart for SharePoint	2
Grant API Permissions	6
Install Penthara Org Chart for Microsoft Teams	7
Usage References	9
How to create custom User Profile Properties in SharePoint Online?	9
How to update Azure AD Extended Attributes via Graph Explorer?	9
Custom SharePoint Properties in Admin Settings Panel	11
Creating Custom SharePoint Properties	13
Mapping Custom SharePoint Properties to Managed Properties	17
Conclusion	22



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.

Back to Apps SharePoint Store O Search by app name or publisher
Categories Ai Best Apps of the Year Apps that complement Viva Connections Busines: Two complexities on exprove and point on provide of approximation a personality defination in the forward Twenge approximation (approximation to personality defination to the forward Twenge approximation (approximation to personality defination to the forward Twenge approximation (approximation to personality defination to the forward Twenge approximation (approximation to personality defination to the forward Twenge approximation (approximation to the forward Twenge approximation) Construction: Two complexities approximation (approximation to the forward Twenge approximation) Construction: Twenge approximation (approximation to the forward twenge approximation) Construction: Twenge approximation (approximation) Construction: Twenge approxima
Education Employee Interaction Featured apps
File Converters & Viewerss Nieteer Forms for Office 365 Process Automation for Office 365 Nieteer Source 10 Nieteer Workflow for Office 365 Forms Nietee Configure 40 Address and work. Nieteer Configure 40 Address and work. Image & Video Galleries X Video Galleries X Video Galleries X Video Galleries X Video Galleries Nieteer Configure 40 Address and work.

5. Search for "Penthara" in the search box.





l result foun	sult found for " penthara "				
ategories					
All					
Best Apps of the Year	гХл 888				
Business	Penthara Org Chart for				
Clocks & Calendars	SharePoint Penthara Technologies				
Communication	An Org Chart application				
Content Management	with advanced capabilities like Advanced Search,				
CRM					

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**.

Microsoft Tauma	Q Sauk	Γ ² η 288
OrganizationChart Cry.c	Advanced Search Results	 Penthara Org Chart for SharePoin
	Magneticativity User 1000 Income Boddy at una 000 00 00	Provided by: Penthara Technologies 公公公公公(0 Ratings)
	App image	Add to app catalog
	japitati 🖉	
	1 of 5	

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.



	ta access	×
RR Penthara	a Org Chart for SharePoint	
	about to enable will have access to data by usin g it. Enable this app only if you trust the develop	
This app gets dat	ata from:	
SharePoint		
API access that n	must be approved after you enable this app	
• Microsoft Gra	aph, User.Read.All	
• Microsoft Gra	aph, User.ReadBasic.All	
• Microsoft Gra	aph, People.Read	
 Microsoft Gra 	aph, Calendars.Read	
App availability		
Only enable t	this app	
Selecting this	is option makes the app available for site owne ge. Learn how to add an app to a site	rs to add from the
	· · · · · · · · · · · · · · · · · · ·	
My apps pag	app and add it to all sites	

- 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.

Approve access so this app works as designed $\qquad imes$							
This app has been enabled. For this app to work as designed, it needs additional API access. To approve the permission request now, select Go to API access page , and then look under Pending requests .							
To approve access to third-party APIs, you must be signed in as an Application Administrator. To approve access to Microsoft APIs, you must be signed in as a Global Administrator.							
Learn more about managing permission requests							
Go to API access page I'll do it later							

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.



API access Manage access to Azure AD-secured APIs from SharePoint Framework components and scripts. Learn about managing permission requests								
\sim		API name	Package	Permission	Last requested			
\sim	Per	nding requests (5)						
	\checkmark	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			
\sim	Арј	proved requests (0)						

- 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: This is a Critical step. If this step is skipped, the app will not work at all.
- 13. After you are done approving the requests, the **API Access** section will look like this.

	ss to A		t Framework components and scripts.			
~	ΑΡΙ	name	Package	Perm	ission	Last requested
\sim	Per	nding requests (0)				
\sim	Арј	proved requests (5)				
	\sim	Organization-wide (5)				
		Microsoft Graph	-		User.Read.All	-
		Microsoft Graph			People.Read	-
		Microsoft Graph	-		Presence.Read.All	-
		Microsoft Graph	-		Calendars.Read	-
		Microsoft Graph	-		User.ReadBasic.All	-





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.

Manage ap	Manage apps									
Upload, enable, and mar	Upload, enable, and manage apps. To update SharePoint Store apps, go to the classic experience.									
Learn more about mana	Learn more about managing apps									
→ Upload …										~ 7 O
Apps for SharePo										
lcon \checkmark	Title \checkmark	App version \vee	State \vee	Added to all sites \vee	Available for \smallsetminus	Valid app package \vee	Modified $\downarrow \smallsetminus $	App type \vee	Publisher \vee	+ Add column
181 888	Penthara Org Chart for SharePoint	1.0.0.1	 Enabled 	Yes	லில்	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 <u>Install Penthara Org Chart for SharePoint</u> section.
- 2. Click on API Access page in the SharePoint App Catalog.

fanage access to Azure AD-secured APIs from SharePoint Framework components and scripts. earn 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					

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

		n SharePoint Framework components	and scripts.	
\checkmark	API name	Package	Permission	Last requested
\sim	Pending requests (0)			
\sim	Approved requests (5)			
	 ✓ Organization-wide (5) 	5)		
	Microsoft Graph	-	User.Read.All	
	Microsoft Graph	-	People.Read	-
	Microsoft Graph	-	Presence.Read.All	
	Microsoft Graph	-	Calendars.Read	-
	Microsoft Graph	-	User.ReadBasic.All	-

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.

	Microsoft	Teams		
Activity	Apps			
(F) Chat	Search			Q
iii Teams	🗄 Apps	5		^
	Find an ap	p		Q
Calendar	Recent 🗸			
Calls	•			F
Files	Shifts	Tasks by Planner an	OneNote	Wiki
	>	٩	×	e
	Stream	Approvals	Excel	Microsoft Scenes
	>		Ð	
	Power Automate	PowerPoint	Updates	Viva Insights
			Mo	ore 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.

	Microsoft Teams	Q. Search
 Activity	Apps	
(F) Chat	Search	Q
titi Teams	🗄 Apps	↑ These great a
	Built with Power Platform	Use these apps to get the
Calendar	Featured	
٤.	Popular on Teams	
Calls	Top picks	
	What's new	
Files	Best selling	Popular on Teams
		Added and used the most on Microsoft Te
	Categories	
	Microsoft	Forms Microsoft Corporation
	Education	
	Productivity	Power BI Microsoft Corporation
	Image & video galleries	
	Project management	Communities Microsoft Corporation
	Utilities	Microsoft corporation
	See more	Microsoft
	Industries	MICrosoft
	Agriculture	Forms
	Distribution	Microsoft Corporation
	Education	Milestones
88	Finance	Microsoft Corporation
Apps	Government	Bulletins
? Help	c _e ^O Workflows	Microsoft Corporation
$\overline{1}$	🛱 Manage your apps	Education

4. From the **Manage your Apps** screen, Search for "**Penthara**" in the search box.

ps (3)	
Penthara Org Chart Add Add	Penthara Org Chart Ope
An Org Chart application with advanced capabilit	An Org Chart application with advanced capabilit
★ 5.0 (1 rating)	
Communication Productivity	Built for your organisation

- 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.

-0-	Penthara Org Chart ×
	Penthara Technologies
XXX	Add
Overview Pern	nissions
An Org Chai	t application with advanced capabilities.
App. Penthara O Teams App in Mi	zation Chart for Microsoft Teams is a custom-built App for Microsoft Teams that works in conjunction with SharePoint rg Chart for SharePoint needs to be installed as a pre-requisite to be able to use Penthara Org Chart for Microsoft crosoft Teams. This app comes with a host of new features like Advanced Search, Custom SharePoint User Profile Active Directory Extended Attributes and much more.
App feature	s
Personal app Keep track of im	portant content and info
Created by: <u>Pent</u> Version 1.0.1	hara Technologies
Permissions	
	essages and data that I provide to it. r profile information such as my name, email address, company name and preferred language.
Jy using Penthara	Org Chart, you agree to the privacy policy, terms of use, and permissions.

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.

	🕫 Try the new Teams 🕥	Q, Search	🚱
(P) OM	RRR Penthara Org Chart Penthara Org Chart f About		00
5.45			Search By Name or Designation
රිරි Tears		Miriam Graham	
		MG Hindager 123-555-6672	
Developer.			
inter o			
	1		
Apps.			
(?) Help			
\pm		Made with ♥ at Penthara Technologies	

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 <u>Graph Explorer</u> 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.

© 2024 Penthara Technologies Inc

www.penthara.com | info@penthara.com





- 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.

Direct	riam Graham tor 58 555 0109	
6 1	CP &	^
About Me	My Projects	Skills
FunctionalTitle OfficeHybrid	: Business Director : WFH	

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.





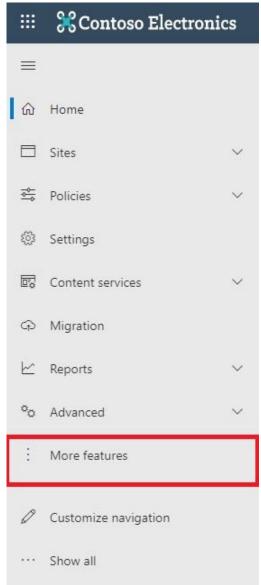
enthara Org Chart Penthara Org Chart f About	it			C
		Advance Search		
Display Name	Job Title	Education and School	FunctionalTitle	
Intrests and Hobbies				
		Search Cancel		

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.



Term store	User profiles	Search	Apps
Create and manage term sets to help users enter data consistently. Learn more	Add and remove admins for a user's OneDrive. disable OneDrive creation for some users, and more. Learn more	Help users find what they're looking for. Learn more	Configure SharePoint Store settings, monitor app usage, manage app licenses, and more. Learn more
Open	Open	Open	Open
BCS	Secure store	Records management	InfoPath
Manage connections to data sources like Azure SQL databases or WCF web services. Learn more	Create and set the credentials for Target Applications used for BCS connections. Learn more	Manage records in a Records Center site that serves as an archive. Learn more	Enable browser-based InfoPath forms, Learn more
Open	Open	Open	Open
Hybrid picker	Classic site collections page		
Use this wizard to automate some of the steps in setting up a hybrid environment. Learn more	▲ This page was removed on 1/1/21. Learn where to find features from this page.		
Open	Open		

User profiles		
People Panage User Properties Manage User Profiles Manage User Sub-types Manage Audiences Manage User Permissions Manage Policies My Site Settings My Site Settings	Profiles Number of User Profiles Number of Organization Profiles Number of Organization Properties Audiences	42 116 1 15
	Number of Audiences Uncompiled Audiences Audience Compilation Status	1 O Idle
	Last Compilation Time	Ended at 6/25/2022 1:00

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.

lser profiles					
e this page to add, edit, organize, delete or map us	er profile properties. Profile properties can be mapped to	Active Directory or LDAP compliant directory servi	ces. Profile properties can also be mapped to Application Entity Fields	exposed by Business Data Connectivity.	
Whew Property 📾 New Section 🍽 Manage Sub	-types Select a sub-type to filter the list of properties	Default User Profile Subtype 💙			Go to page 🛛 🕶 of 1
Property Name	Change Order	Property Type	Mapped Attribute	Multivalue	Alias
Basic Information	~	Section			
d	~~	unique identifier			
ID	~~	binary.			
Active Directory Id	~~	binary			
Account name	~*	Person	<specific connection="" to=""></specific>		~
irst name	~~	string (Single Value)			
Phonetic First Name	~~	string (Single Value)			
ast name	~~	string (Single Value)			
Phonetic Last Name	~*	string (Single Value)			
lame	~~	string (Single Value)			~
Phonetic Display Name	~~	string (Single Value)			
Vork phone	~~	string (Single Value)			
Department	AV	string (Single Value)			
itle	~~	string (Single Value)			
Department	~~	string (Single Value)			
/lanager	~~	Person			
About me	~~	HTML			
Personal site	~~	URL			
Picture	AV	URL			
Jser name	AY	string (Single Value)			~
Quick links	~~	string (Single Value)			
Veb site	~~	URL			
Public site redirect	~~	URL			
ob Title	~~	string (Single Value)			
Data source	~~	string (Single Value)			
//emberOf	~~	string (Multi Value)			
Ootted-line Manager	~~	Person			

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."





User profiles

Use this page to add a property for user profiles.	
* Indicates a required field	
Property Settings	
Seculy property settings for this property. The mane will be used programmatically for the property by the user profile service, while the display name is the label used when the property is created the only property property is created the only property setting you can change is the display name.	Name: * Display Name: * Edd Languages Type: Lengtin: [25] Configure a Term Set to be used for this property
Sub-type of Profile	Default User Profile Subtype
Please select the sub-type of user profiles with which you want to associate this profile property.	
User Description	
Secoly a description for this property that will provide instructions or information to users. This description appears on the Edit Details page.	Description: Edit Languagen
Policy Settings	Policy Setting:
Specify the privacy patient you want applied to this property. Select the Replicat checks for M you want to the property to display in the user info list for all tables. The operation properties, the default privacy must be set to Everyone and the User can override check box must not be selected.	Beguind → Default Privacy Setting: Only Me → Outse can override Replicable
Edit Settings	Allow users to edit values for this property

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

Type: string (Single Value) ¥ big integer binary boolean date date no year date time E-mail float HTML integer Person string (Multi Value) string (Single Value) time zone unique identifier URL

- 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





Microsoft Teams, **this option should be set to** "<u>Everyone.</u>" 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.

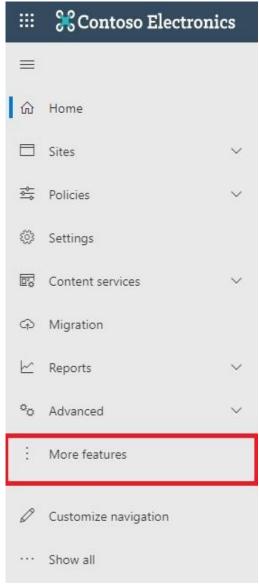
Policy Setting: Required ¥ Default Privacy Setting: Everyone ¥ User can override Replicable

- 6. After filling in all the details, click on the "OK" button in the bottom right corner. This property will be saved.
- 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.



More features

Access familiar features from the classic SharePoint adn	nin center.		
Term store	User profiles	Search	Apps
Create and manage term sets to help users enter data consistently. Learn more	Add and remove admins for a user's OneDrive. disable OneDrive creation for some users, and more. Learn more	Help users find what they're looking for. Learn more	Configure SharePoint Store settings, monitor app usage, manage app licenses, and more. Learn more
Open	Open	Open	Open
BCS	Secure store	Records management	InfoPath
Manage connections to data sources like Azure SQL databases or WCF web services. Learn more	Create and set the credentials for Target Applications used for BCS connections. Learn more	Manage records in a Records Center site that serves as an archive. Learn more	Enable browser-based InfoPath forms. Learn more
Open	Open	Open	Open
Hybrid picker	Classic site collections page		
Use this wizard to automate some of the steps in setting up a hybrid environment. Learn more	▲ This page was removed on 1/1/21. Learn where to find features from this page.		
Open	Open		
			Q Need help? Feedback ×

3. Click on "Manage Search Schema."

Manage Search Schema Create and modify search properties	o that users can query these properties.
Manage Search Dictionaries Create and modify lists of terms whic	will be used to improve the search experience for your users.
Query Suggestion Settings Show search suggestions as users typ	i in the search box (if not disabled by user).
Manage Result Sources Create and modify sources you can q	rery for results. This includes filtered results from SharePoint as well as results from remote sources such as Bing.
Manage Query Rules Create and modify query rules to pro	note important results, show blocks of additional results, and even fine-tune ranking.
Remove Search Results List URLs you would like to remove fr	im search results until the next crawl.
View Usage Reports See how often your users search, wha	: their top queries are, and which queries they're having trouble getting answers for.
Search Center Settings Tell us where searches should go by s	sectifying the location of your Search Center.
Export Search Configuration Create a file that includes all customi	ed query rules, result sources, result types, ranking models and site search settings but not any that shipped with SharePoint, in the current tenant, that can be imported to other tenant
Import Search Configuration Import a search configuration file.	
Crawl Log Permissions Grant users read access to crawl log i	formation for this tenant

4. Click on "New Managed Property."



Search										
Managed Properties Crawled Propert	ies Categories									
Ranages Properties Crawles Property	les 1 caregories									
										e context of a crawled property to the search index by mapping the crawled property to a managed property. You can ged property will take effect after the next full crawl. Note that the settings that you can adjust depend on your curr
Managed property										
∍										
New Managed Property PROPERTY NAME	ТУРЕ	MULT	QUERY	SEARCH	RETRIEVE	REFINE	SORT	SAFE	MAPPED CRAWLED PROPERTIES	ALIANS
ADObjectID	Text	-	Query	-	Retrieve	-	Sort	Safe	People:msOnline-ObjectId	
AboutMe	Text		Query		Retrieve				People:AboutMe, ows_Notes	
Account	Text		Query		Retrieve				ows Name	
ccountName	Text	-		Search	Retrieve	-	-		People:AccountName	
nalyticsPath	Text		Query		Retrieve			Safe		
nchorText	Text	2		Search				Safe	Basic:28	
ppProductIDOWSGUID	Text									
ppVersion	Text				Retrieve			Safe	ows_AppVersion	
ssignedTo	Text	2	Query	-	Retrieve				ows_AssignedTo, ows_Assigned_x0020_To	
ttachmentDescription	Text		-		Retrieve	-	-		ows_MediaLinkDescription	
ttachmentType	Integer		Query	9	Retrieve	Refine			ows_MediaLinkType	
ttachmentURI	Text	-		8	Retrieve	-	122		ows_MediaLinkURI	
udiences	Text	Multi	Query		Retrieve	Refine	-		ows_ModernAudienceAadObjectIds	Document_Audiences, ModernAudienceAadObjectIds
luthor	Text	Multi	Query	Search	Retrieve		Sort		Author, MailFrom, Mail:6	DocAuthor, urn:schemas-microsoft-com:office:office#Author
uthorOWSUSER	Text	-	Query	-	Retrieve	-	-	-	ows_q_USERAuthorByline, ows_q_USER_Author	
AutoTagClassificationId	Text	-	Query		Retrieve	Refine	-			
AverageRating	Decimal				Retrieve			c.e.	and the second se	
									ows_AverageRating	

- 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."

	ose advanced searchable settings	
	age to view and change the advanced settings of the New Fext) managed property.	9
ull-		
ext ndex		
ndex Defines		
vhich		
ull-text	Peopleidx 🗸	
idex a ianaged		
roperty		
stored		
n.		

- 6. Scroll down and click "Save" in the bottom right corner.
- © 2024 Penthara Technologies Inc

Search



- 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.
- 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.

Search										
Managed Properties Crawled P	Properties Categories									
										t. You add the content of a crawled property to the search index by mapping the crawled property to a managed property. You can use th is page. Changes to a managed property will take effect after the next full crawl. Note that the settings that you can adjust depend on yo
-Filter-										
Managed property		-								
⇒										
New Managed Property										
PROPERTY NAME	TYPE	MULT	QUERY	SEARCH	RETRIEVE	REFINE	SORT	SAFE	MAPPED CRAWLED PROPERTIES	ALIASES
ADObjectID	Text		Query		Retrieve		Sort	Safe	People:msOnline-ObjectId	
boutMe	Text	1	Query	-21	Retrieve	2		Safe	People:AboutMe, ows_Notes	
iccount	Text		Query		Retrieve			Safe	ows_Name	
ccountName	Text	7.27	Query	Search	Retrieve	2	-	Safe	People:AccountName	
gencyOWSTEXT	Text.									
inalyticsPath	Text		Query	+	Retrieve	2		Safe		
nchorText	Text	-	-	Search	-	-	~	Safe	Basic:28	
ppProductIDOWSGUID	Text									
ppVersion	Text				Retrieve			Safe	ows_AppVersion	
ssignedTo	Text		Query	-	Retrieve	-			ows_AssignedTo, ows_Assigned_x0020_To	
ttachmentDescription	Text	100	-	-	Retrieve		-		ows_MediaLinkDescription	
ttachmentType	Integer		Query		Retrieve				ows_MediaLinkType	
ttachmentURI	Text	192		2	Retrieve				ows MediaLinkURI	
udiences	Text	Multi	Query	-	Retrieve	Refine			ows_ModernAudienceAadObjectIds	Document_Audiences, ModernAudienceAadObjectIds
uthor	Text	Multi		Search	Retrieve		Sort	-	Author, MailFrom, Mail:6	DocAuthor, um:schemas-microsoft-com:office#Author
uthorOWSUSER	Text		Query		Retrieve	-			ows_q_USERAuthorByline, ows_q_USER_Autho	
AutoTagClassificationId	Text		Query		Retrieve					

- 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.

earch		
tanaged Properties Crawled Properties Categories		1-50 +
se this page to view or modify crawled properties, or to view crawled properties in a	a particular category. Changes to properties will take effect after the next full crawl. Note that the settings that you can adjust depend on your current authorization level.	
Filters		
Crawled properties		
and the second sec		
Category All 🗸		
Show unaltered property names		
Ð		
PROPERTY NAME	MAPPED TO PROPERTY	
PROPERTY NAME harePoint2147418090	MAPPED TO PROPERTY	
harePoint:2147418090 IAV:contentclass	MAPPED TO PROPERTY contentclass	
harePoint:2147418090 AV:contentclass AV:iscollection		
harePoint:2147418090 AW:ontentclass MV:siscellection NarePoint:PluggableSecurityTrimmerId	contentclass	
harePoint 2147418090 AV:contentclass AV:iscolietion harePointPluggableSecurityTrimmertd harePointPluggableSecurityTrimmertd	contentclass IsDocument	
haraboint.2147418000 AV:contentiss Mu:collection haraPoint:sdocument haraPoint:sdocument content-Class	contentclass	
harePoint2147418090 AV.contentiass AV.iscollection harePointFluggableSecurityTrimmerid harePointFluggableSecurityTrimmerid content-Class content-Class	contentclass IsDocument contentclass	
harabolint.2147418000 Av contentions Murcollection harePointioCoursent ontent-Class opple:Amonthe opple:Amonthe	contentclass IsDocument contentclass Description, AboutMe, ContentsHidden	
hareBoint2147418090 AV:contentions MareBoint:PluggableSecurityTrimmend hareBoint:PluggableSecurityTrimmend expolesIonetest18tetCaywords expolesIonetest18tetCaywords expolesIonetDiame	contentclass IsDocument contentclass	
harePoint2147418090 AV.contentiass SW/iscollection harePointFluggableSecurityTrimmerid harePointSubcurent content-Class copiexhaneBeistBetKeywords explexAccountName explexAccountName explexAccountName	contentclass IsDocument contentclass Description, AboutMe, ContentsHidden AccountIname, RankingWeightName	
haraboint.2147418000 Aixcollection haraPoint:Sourcet haraPoint:Sourcet eople:AnoneBestBetKeywords eople:AnoneBestBetKeywords eople:AnoneBestBetKeywords eople:AnoneBestBetKeywords eople:AnoneBestBetKeywords	contentclass IsDocument contentclass Description, AboutMe, ContentsHidden AccountName, RankingWeightname MobilePhone, ContentsHidden	
hareBoint2147418090 Alx:contentions Mixicoltection harePoint:PluggableSecurityTrimmerid harePoint:FluggableSecurityTrimmerid explexionetBestBetKeywords explexionetBestBetKeywords explexionetBestBetKeywords explexionetBestBetKeywords explexionetBestBetKeywords explexionetBestBetKeywords explexionetBestBetKeywords explexionetBestBetKeywords explexionetBestBetKeywords	contentclass InDocument contentclass Description, AboutMe, ContentsHidden AccountName, RankingWeightName MobilePhone, ContentsHidden	
harabolit.2147418000 AV:contentions MV:contentions MV:contentions Anarobinit.00000000000000000000000000000000000	contentclass isDocument contentclass Description, AboutMe, ContentsHidden AccountName, RankingWeightName McbilePhone, ContentsHidden Colleagues PrivateCollagues	
haraboint.2147418000 Alx:contentions Marchoint:PluggableSecurityTrimmerid haraboint:PluggableSecurityTrimmerid content-Class explexitoresettettoywords explexitoresettettoywor	contentclass IsDocument contentclass Description, AboutMe, ContentsHidden AccountName, RaikingWeightName MobilePhone, ContentsHidden Colleagues PrivateGues PrivateGues RaikingWeightName, CombinedName	
hareBoint2147418090 Alx:contentioss Mixiscollection harePoint:PluggableSecurityTrimmerid harePoint:Alscournent content-Class eople:Accounters eople:Accounters eople:Accounters eople:Accounters eople:Accounters eople:Accounters eople:Clasgoues eople:Clasgoues eople:Clasgoues eople:Clasgoues eople:Clasgoues eople:Clasgoues eople:Clasgoues	contentclass InDocument contentclass Description, AboutMe, ContentsHidden AccountName, RankingWeightName MobilePhone, ContentsHidden Colleagues PrivateColleagues PankingWeightName, CombinedName Departmert, RankingWeightNigh	
haraboint.2147418000 Alx:contentions Marchoint:PluggableSecurityTrimmerid haraboint:PluggableSecurityTrimmerid content-Class explexitoresettettoywords explexitoresettettoywor	contentclass IsDocument contentclass Description, AboutMe, ContentsHidden AccountName, RaikingWeightName MobilePhone, ContentsHidden Colleagues PrivateGues PrivateGues RaikingWeightName, CombinedName	

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





12. Click on "Add a Mapping."

Use this page to view or modify the s Name and information	ettings of this property. Note that the settings that you can adjust depend on your current authorization level. Property Name: urnschemas-microsoft-com:sharepoint.portal.profile:Also-Reporting-To	
Name and description of the crawled property. This information on the crawled property is emitted	Category: People Property Set (D: 00110329-0000-0110-c000-000000111146	
by the filter or protocol handler. Mappings to managed		
properties Map this property to one or more managed properties.	Add a Mapping	
	Remove Mapping	
Include in full-text index	Include in full-text index	
Include the content of this crawled property in the full-text index. This enables searching for		
the content of this crawled property without mapping to a managed property. Use this		
setting if the content of this property may be relevant for end- user queries, but you do not see a		
need for a managed property that	newly managed property we created, click on it, and	d click o
mana	ged property selection	
	ged property to map urn:schemas-microsoft-	
com:sharepoil	nt:portal:profile:NewExtendedProperty to	
Search for a	managed property name:	
	Find	
Select a mai	naged property:	
AADObjectI		
AboutMe(Te		
Account(Tex		
AccountNan		
AnalyticsPat AnchorText(
AppVersion(
AssignedTo(1.175/06	
	Description(Text)	
1000 C	Type(Integer)	
Attachment		
Audiences(T	ext)	
Author(Text)		
AuthorOWS		
	sificationId(Text)	
AverageRati		
	ocation(Text)	
BaseType(Te		
BasicScope(I BigInteger(T		
Biginteger(i	ext)	
	1 <u>11</u>	10.00
	ОК	4 (D-9)

- 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.