Building a Rich People Search with OOTB and Open-Source Components

Tuesday November 7, 2023

11am EST

Introductions: **Peter Carson**

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Agenda

- Importance of People Search and Harnessing Employees' Expertise
- Building a Trusted Repository of People Information
- What is Entra ID?
- OOTB, Open Source, Commercial Options
- Viva Skills and LinkedIn Learning
- Applications and Demo

People as Sources of an Organization's Intellectual Property

- **Untapped Potential:** Employees possess vast amounts of knowledge and skills often unknown to the organization
  - Job roles don't often encapsulate the full range of an individual's abilities
- **Remote Challenges:** Distance and lack of in-person interactions make it harder to discover or leverage colleague's expertise
- **Silos of Knowledge:** Without centralized platforms, knowledge remains isolated and underutilized

How much of your IP lives in the minds of the staff?

"If only HP knew what HP knows, we would be three times more productive."

Lew Platt, Former CEO of HP

- **Tacit** knowledge is in someone's head, and the challenge is to make that knowledge **explicit**, or codified in recorded form so that it can be shared
- It's generally accepted that about 20% of a corporation's knowledge is well documented, indexed and archived and can be easily accessed through Knowledge Management (KM) tools.
- Tacit Knowledge Vs. Explicit Knowledge (aiim.org)
- The 80/20 rule of corporate knowledge | LinkedIn

Challenges of the Current State

Where is your people data? HRIS, ERP or payroll systems, IT (Active Directory, Entra ID / Azure AD), LinkedIn, Excel?

How connected are your systems? Is there a system of record?

How well defined are your onboarding, offboarding, and role change processes?

What about profile pictures, expertise, and skills?

Identifying Sources of Information

1. What are all of your repositories?
   - Entra ID, On-prem Azure AD, HRIS systems, SuccessFactors, etc.
2. Which system is your primary system of records for people information?
3. What are your current processes for keeping these systems in sync?
4. Are these processes highly manual and/or cause friction/delays?
   - i.e. do multiple departments need to get involved to update people data across all systems?

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What is Entra ID?

- **Entra:** New name for Microsoft's suite of identity and access products
- **Entra ID: N**ew name, same capabilities as Azure AD
- Other tools:
  - Microsoft Entra ID Governance
  - Microsoft Entra External ID
  - Microsoft Entra Verified ID
  - Microsoft Entra Permissions Management

Data Disarray: The Consequence of Non-Integrated Systems

Inaccurate Decision Making

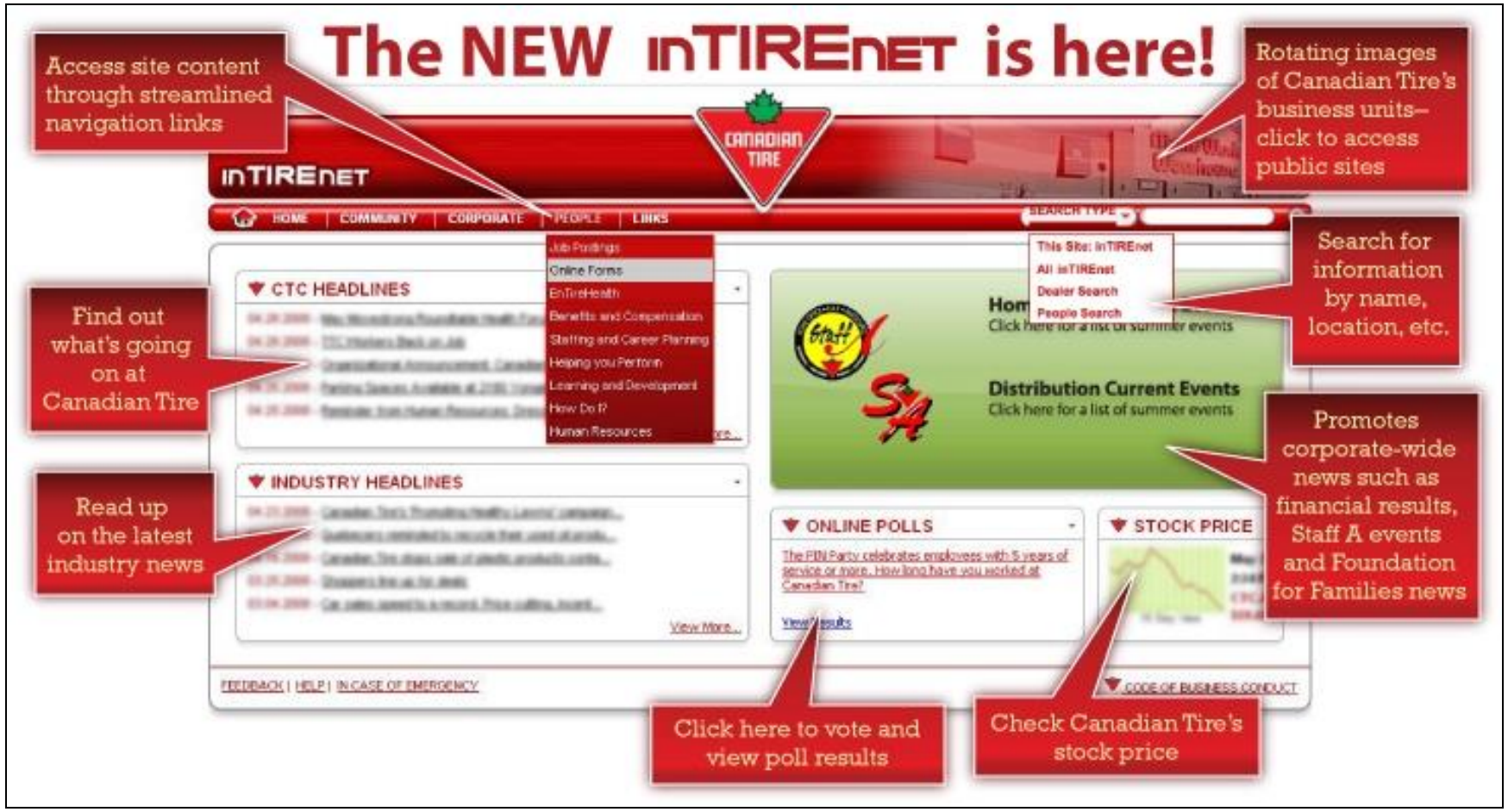
Decreased Productivity

Loss of Trust

Increased Operation Cost

Decreased Data Security

Canadian Tire InTIREnet



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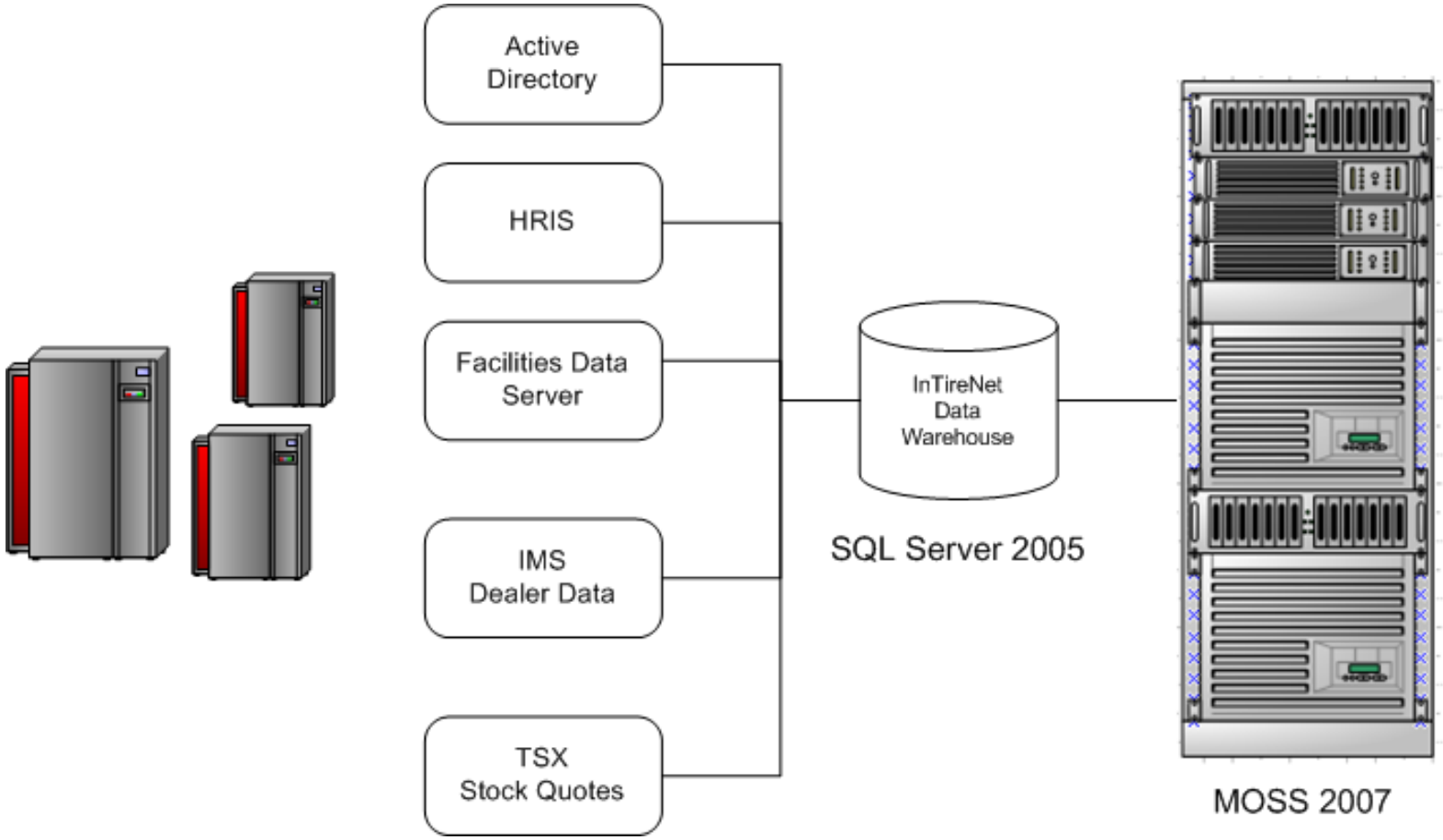
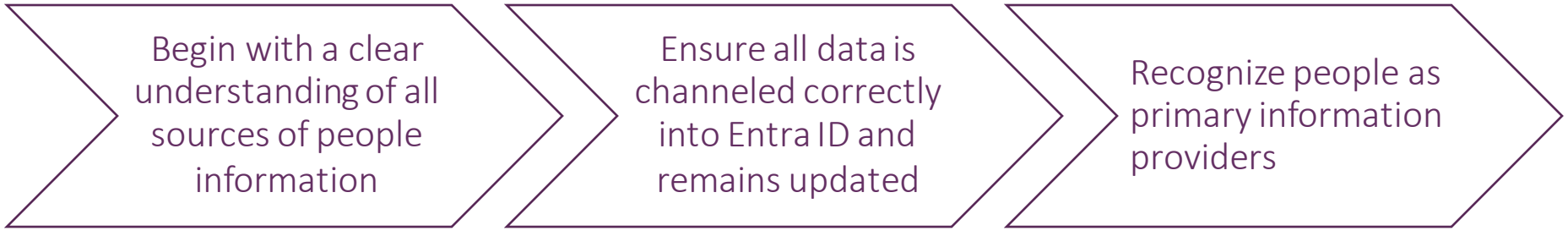
People Data Warehouse

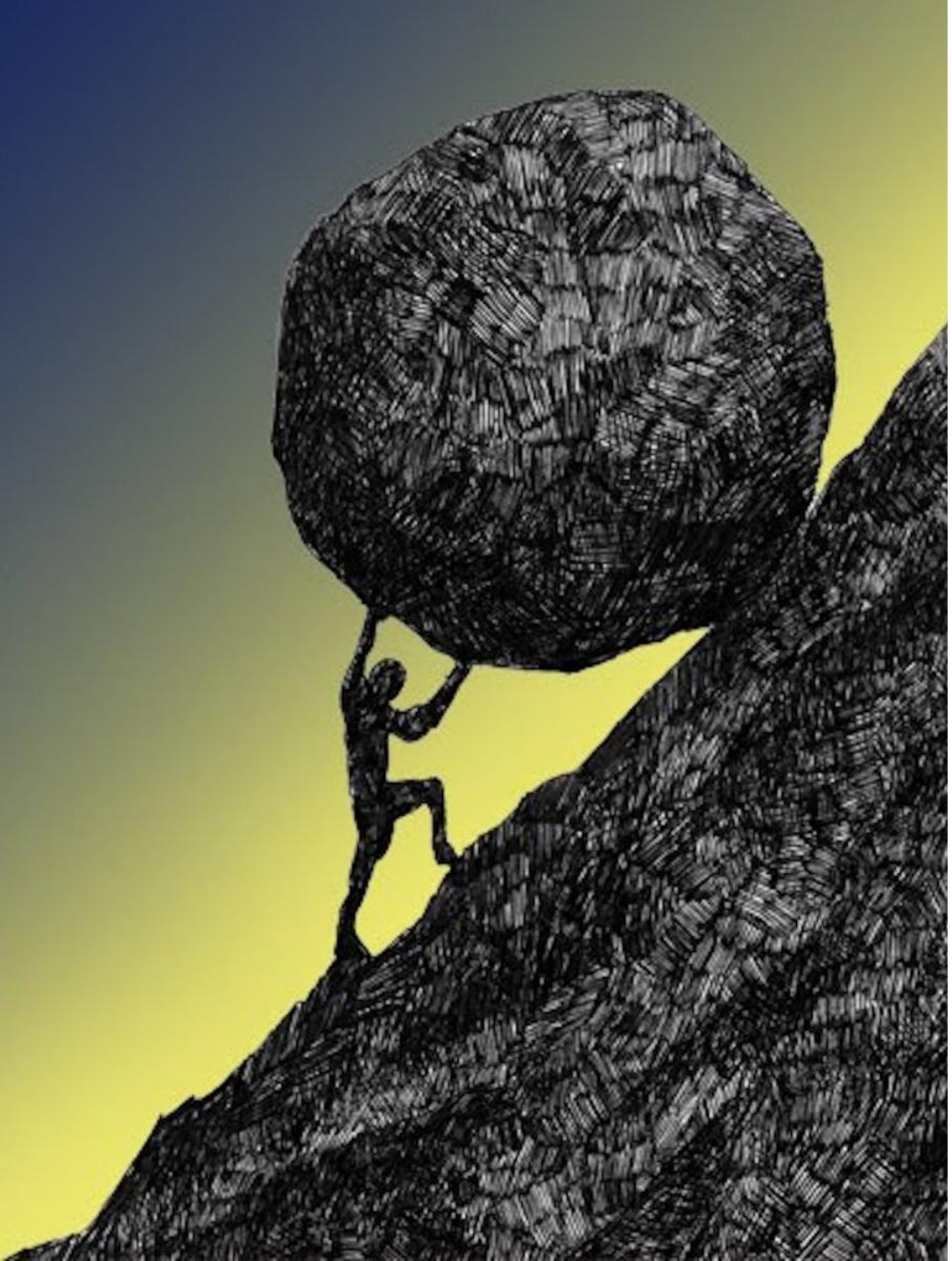


Streamlining and Integrating Your Systems



So, you've level-set your systems in Entra ID – **Now What?**

- One Source of Truth: with Entra ID, all people data comes from a unified, trustworthy location
- Conflict-free Data: eliminated discrepancies across all repositories for seamless syncing and integration
- **Next step: Leverage efficient indexing and profile retrieval in a high-quality and accurate People Search and Directory built on top of Microsoft 365**



Is Great People Search Possible?

- Finding people with the right knowledge drives adoption and utilization on intranets
- Always updated and accurate people info improves resource utilization and collaboration in the organization and within communities
- But the Admin feels like Sisyphus. Employees and community members:
  - Join
  - Leave
  - Change roles
  - Learn something new every day
  - Can't/won't tell you what they know

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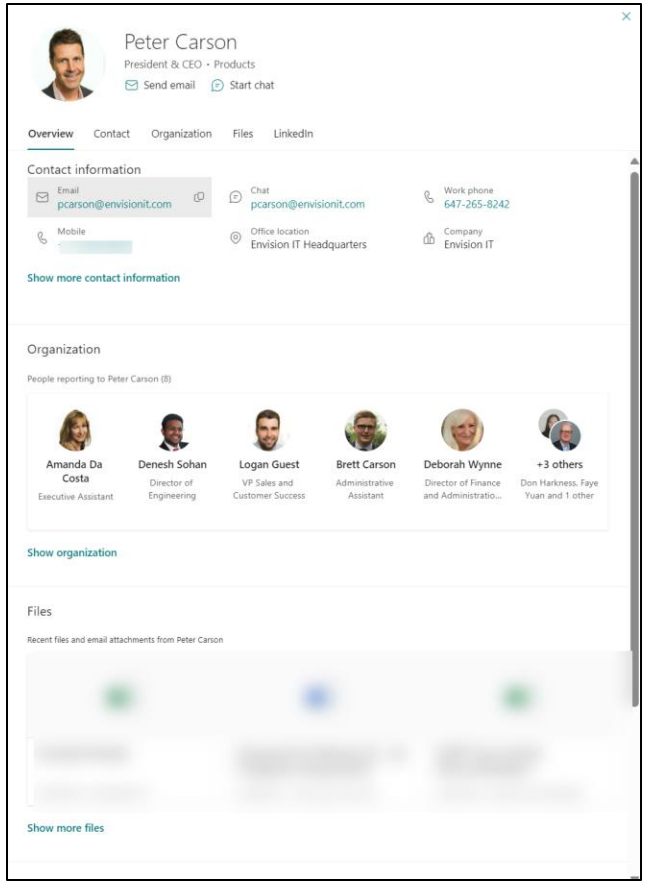
Surfacing People's Untapped Potential with OOTB Microsoft 365

People Search is important because the knowledge in people's heads is so much of the intellectual property that you have as an organization.

- By not tapping into their knowledge, you can lose a huge amount of potential value of your organization.
- Out-of-the-box Microsoft 365 solutions for surfacing employee knowledge:
  - Microsoft Search
  - People Cards
  - People Webparts
  - Org Chart webparts
  - Microsoft Delve

Leveraging People Cards to Highlight People's Expertise

- Microsoft has standardized People Cards across all applications
- Can customize information on People Cards via Microsoft Graph
- Organizational chart
- Surface in Teams, Outlook, SharePoint, …



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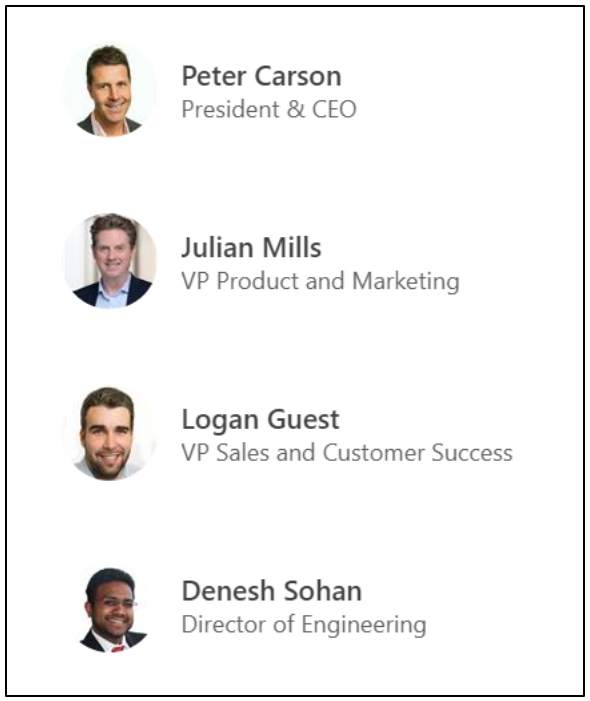
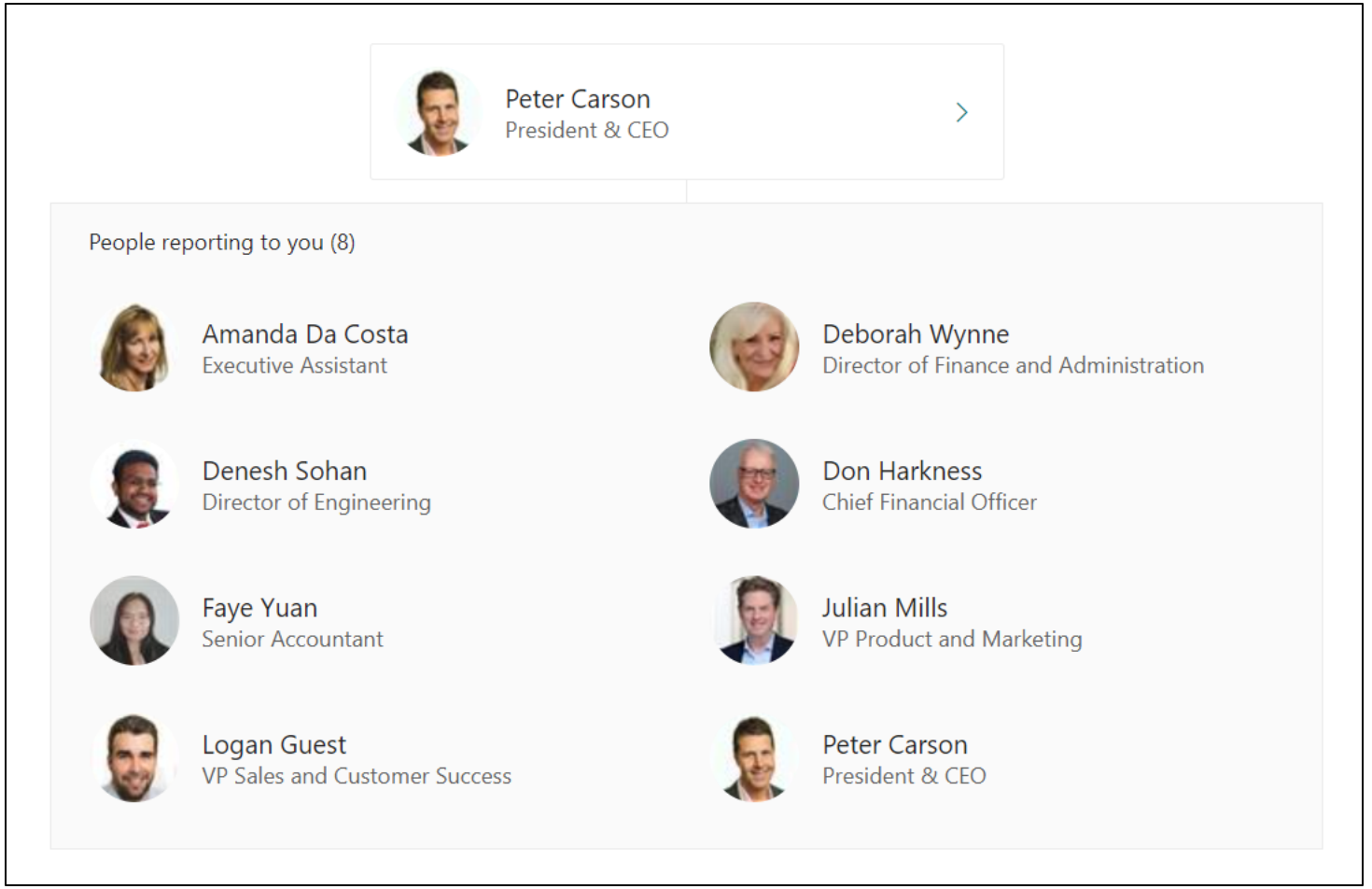
People and Organization Chart Web Parts





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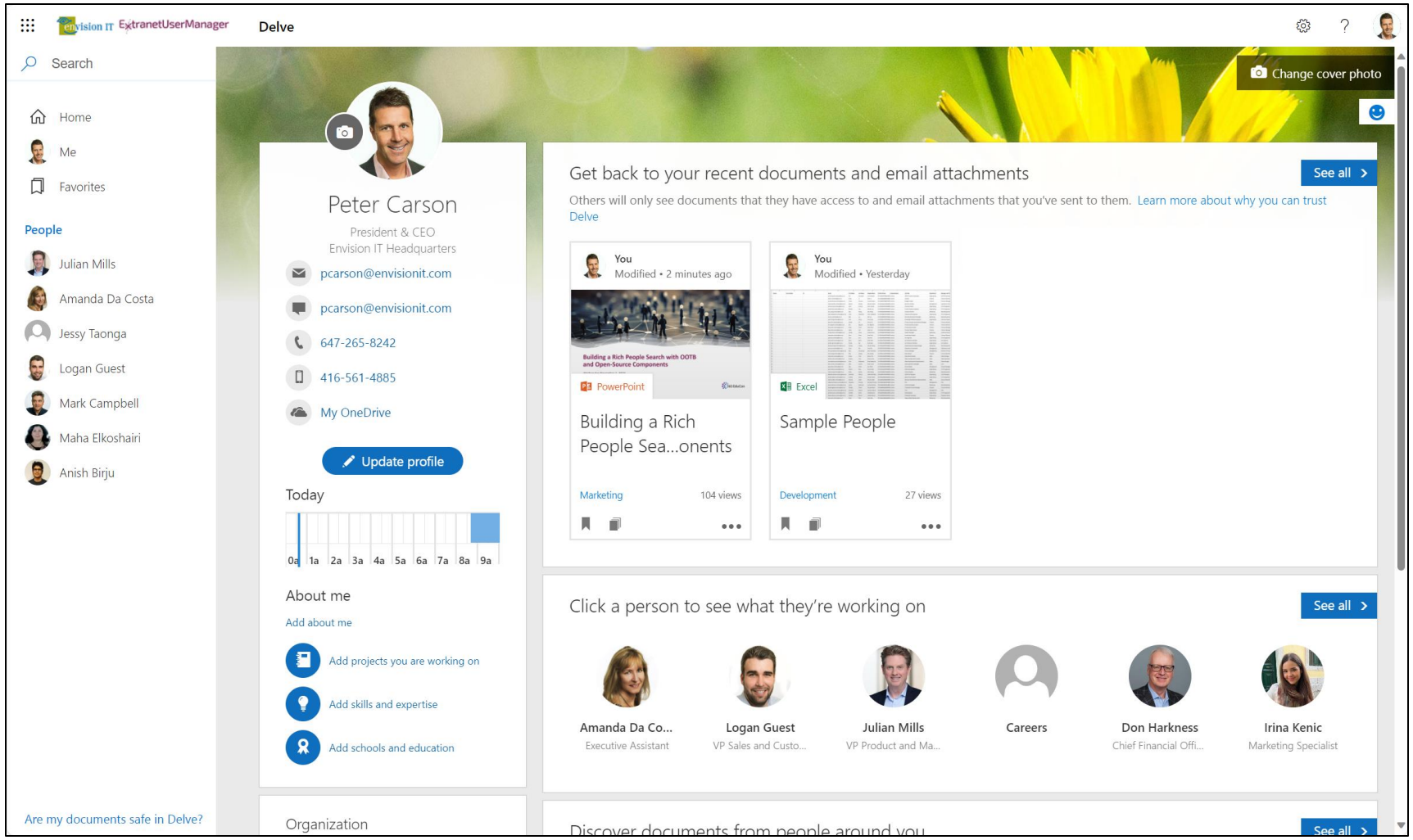

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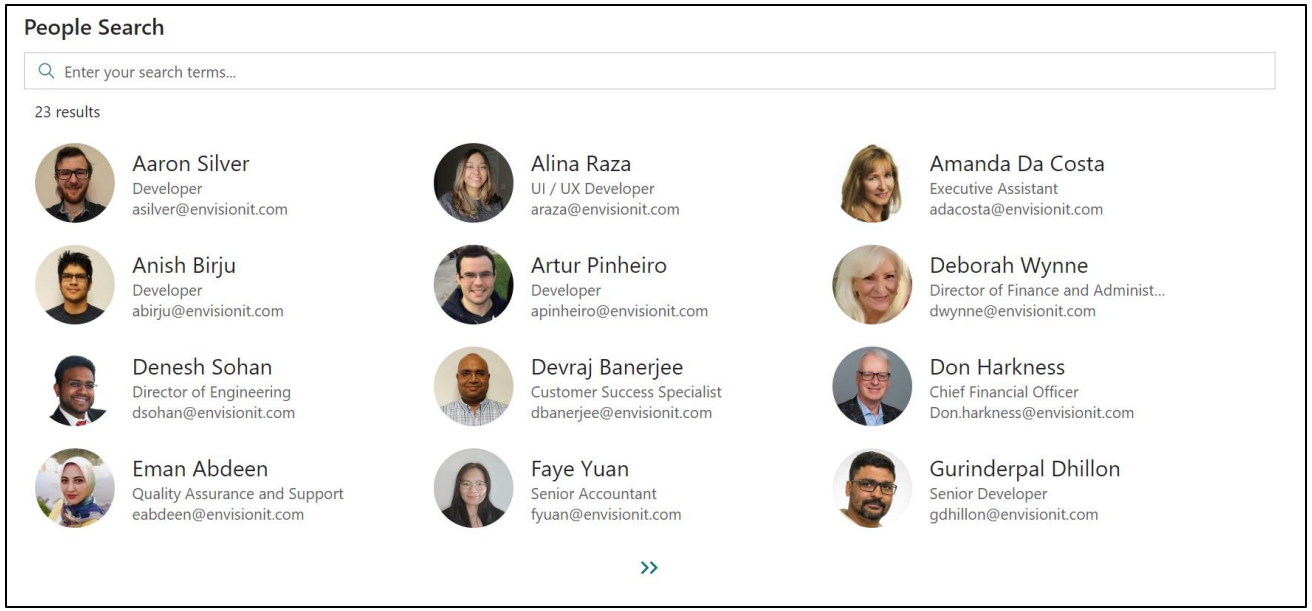
Microsoft Graph People Search Web Part

- Open source
- Based on Microsoft Graph and deployed within SharePoint Online
- Addresses the following requirements:
  - Show person cards
  - Free text search
  - Configurable search query
  - Customizable
  - Render the out-of-the-box Live Person card (LPC) on hover



https://github.com/YannickRe/spfx-msgraph-peoplesearch

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Commercial Products

LiveTiles

[LiveTiles Employee Directory App]

onedirectory

[OneDirectory Employee Directory for Microsoft 365]

CLOUDWELL

[Staff Directory - Cloudwell]

saketa

[Saketa SharePoint Employee Directory]

ATLAS by ClearPeople

[Atlas Employee Directory]

vitextra

[Vitextra Employee Directory]

HR365 www.hr365.us

[HR365 SharePoint Employee Directory]

beyond INTRANET

[Beyond Intranet SharePoint Employee Directory]

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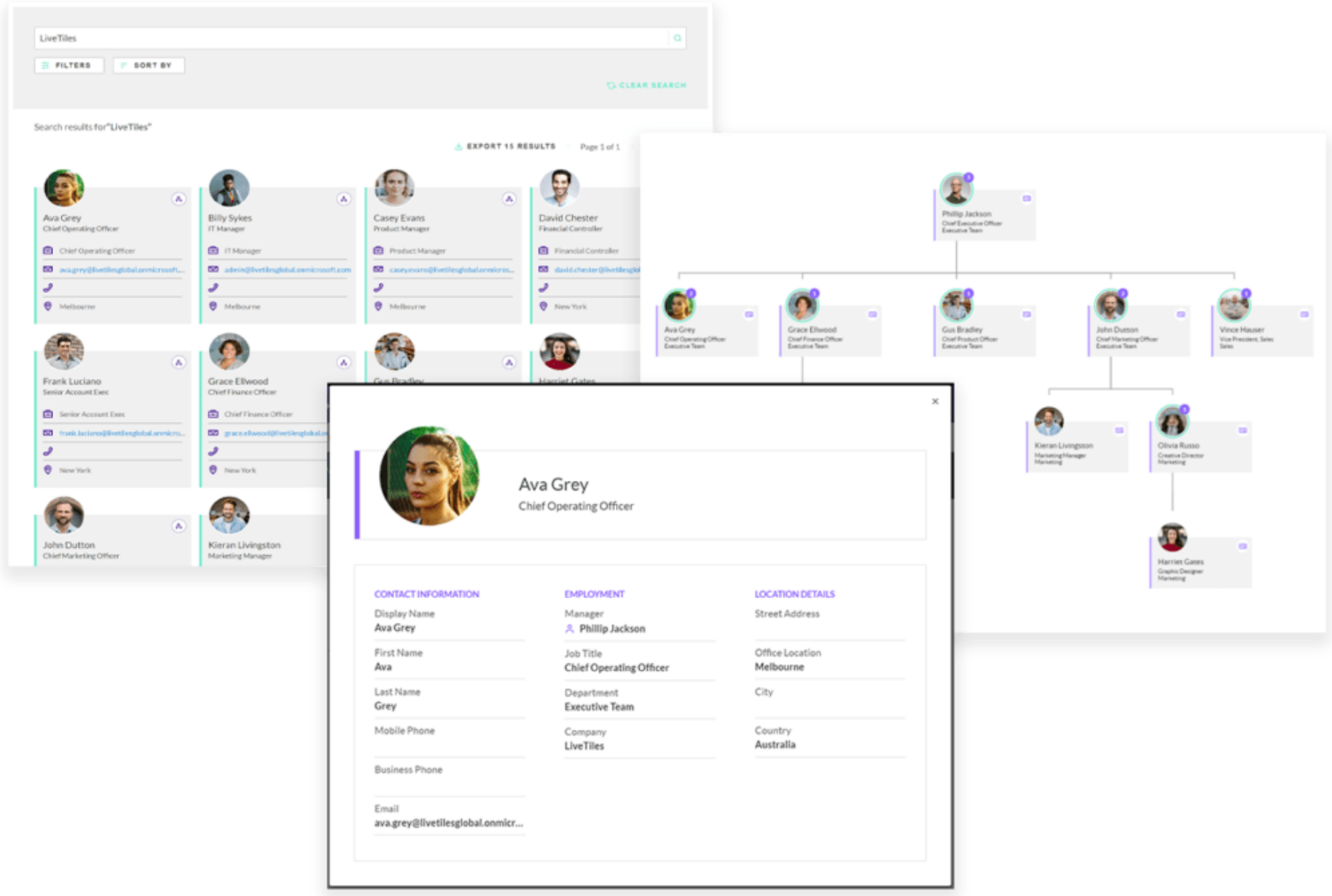
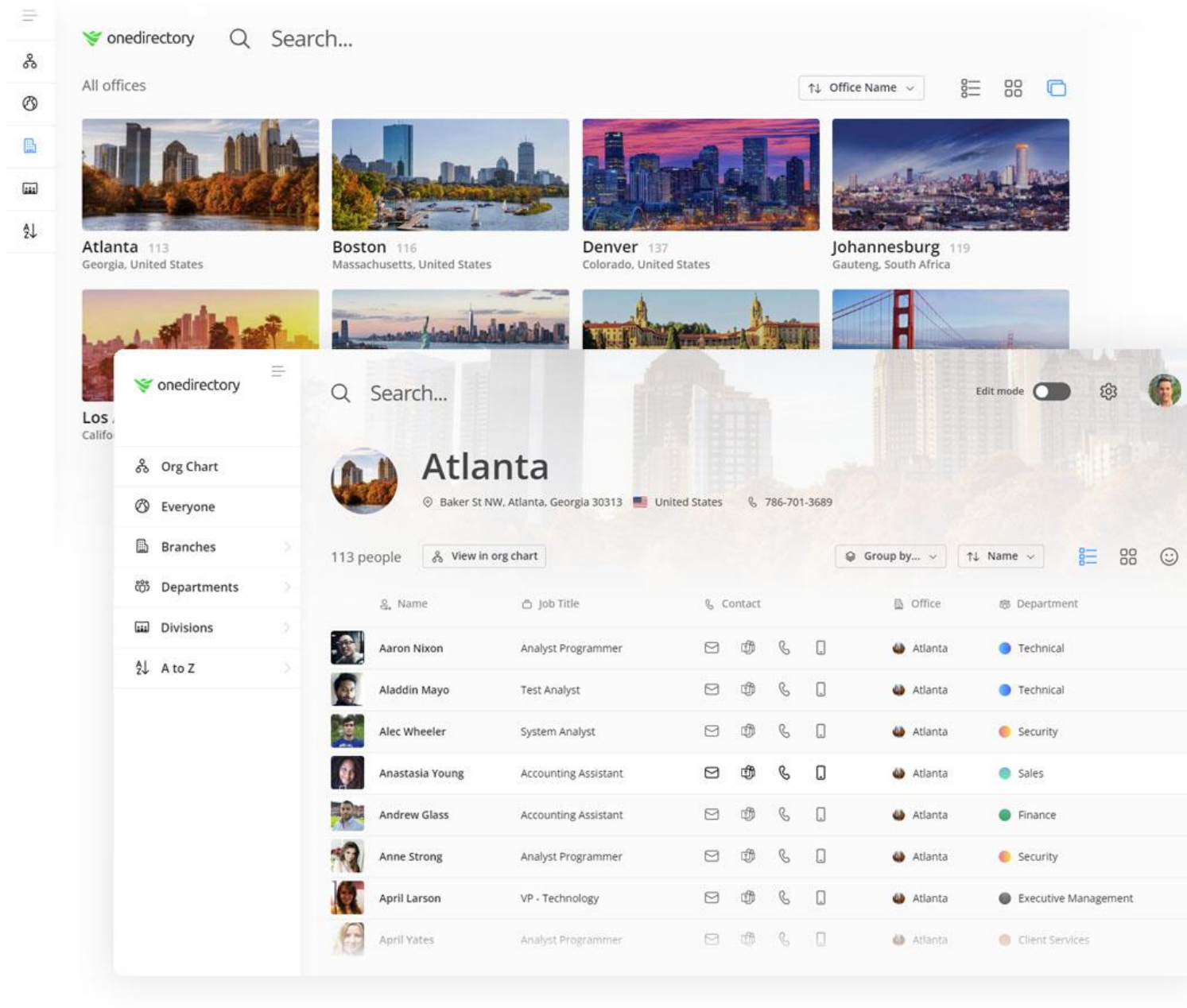


[LiveTiles Directory User Experience]



[Employee Directory Software for Microsoft 365 | OneDirectory]

Starter

The best employee directory and org chart for small teams.

$99

Per month, billed annually

This plan includes:

- 100 employee limit
- Full employee directory
- Automated org chart
- Intelligent search
- Employee profiles
- Offices & departments
- Sync from Microsoft 365
- Live chat & email support

Pro

All-in-one employee directory platform for organizations of all sizes.

$249

Per month, billed annually

1 - 250 employees

$249/mo
1 - 250 employees

$399/mo
251 - 500 employees

$549/mo
501 - 750 employees

$699/mo
751 - 1000 employees

$999/mo
1001 - 9999 employees

Chat to us
9999+ employees

Start a trial →

Custom

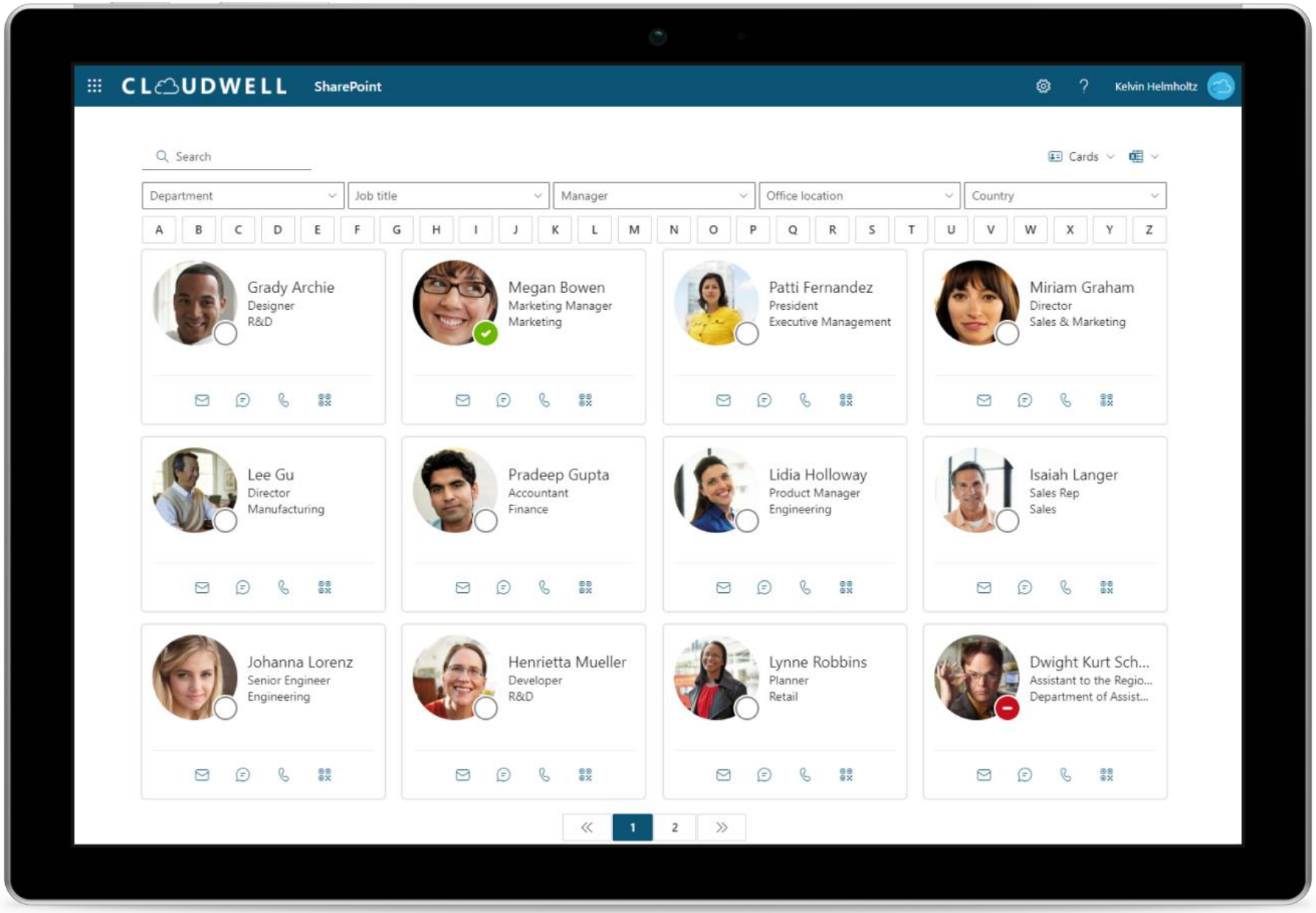
For companies with custom employee directory requirements.

Contact sales

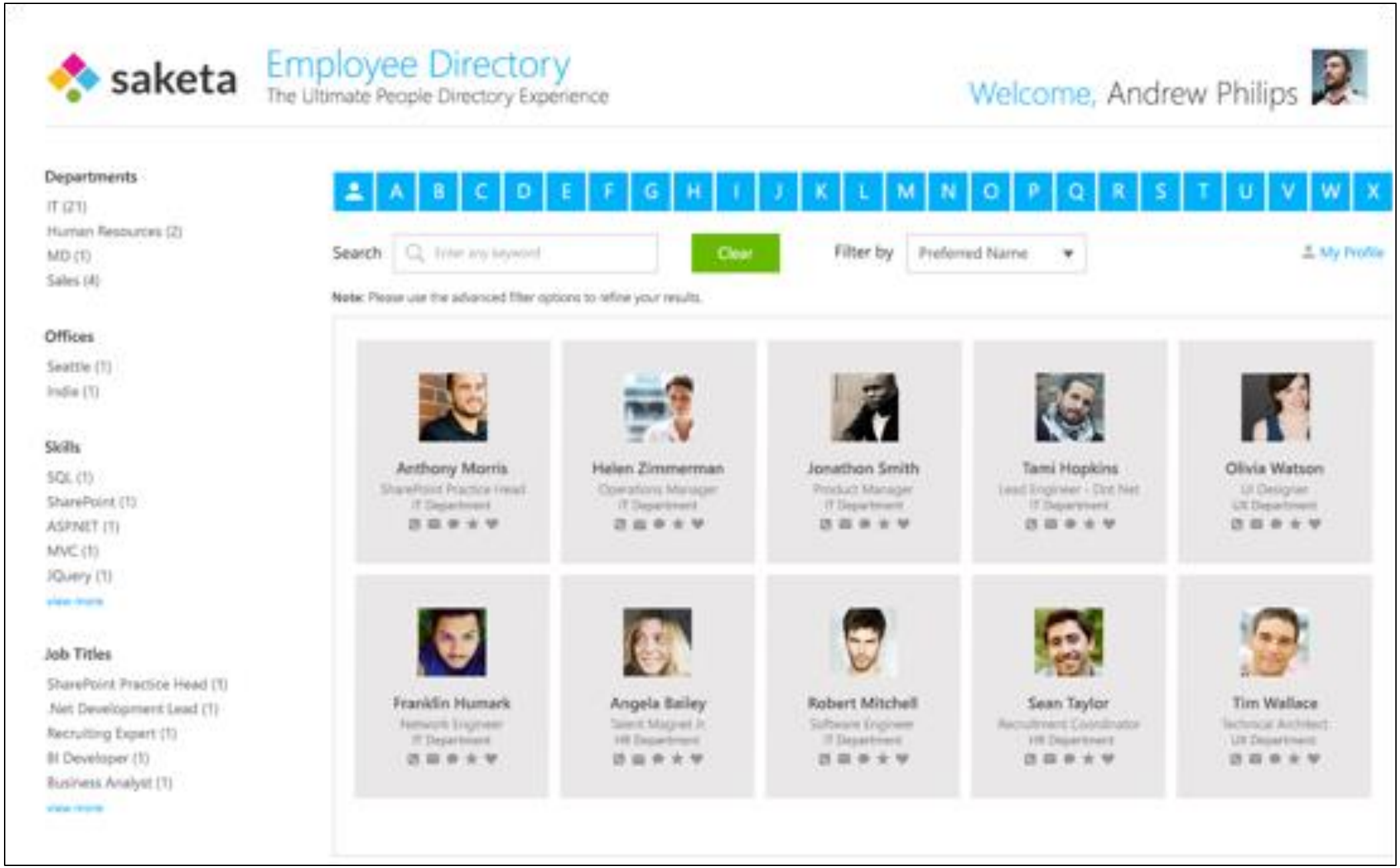
All Pro plan features, plus:

- Unlimited employees
- Multi-tenancy
- Private cloud option
- Data residency
- SSO with SAML
- Custom terms
- Roadmap priority
- Dedicated account manager

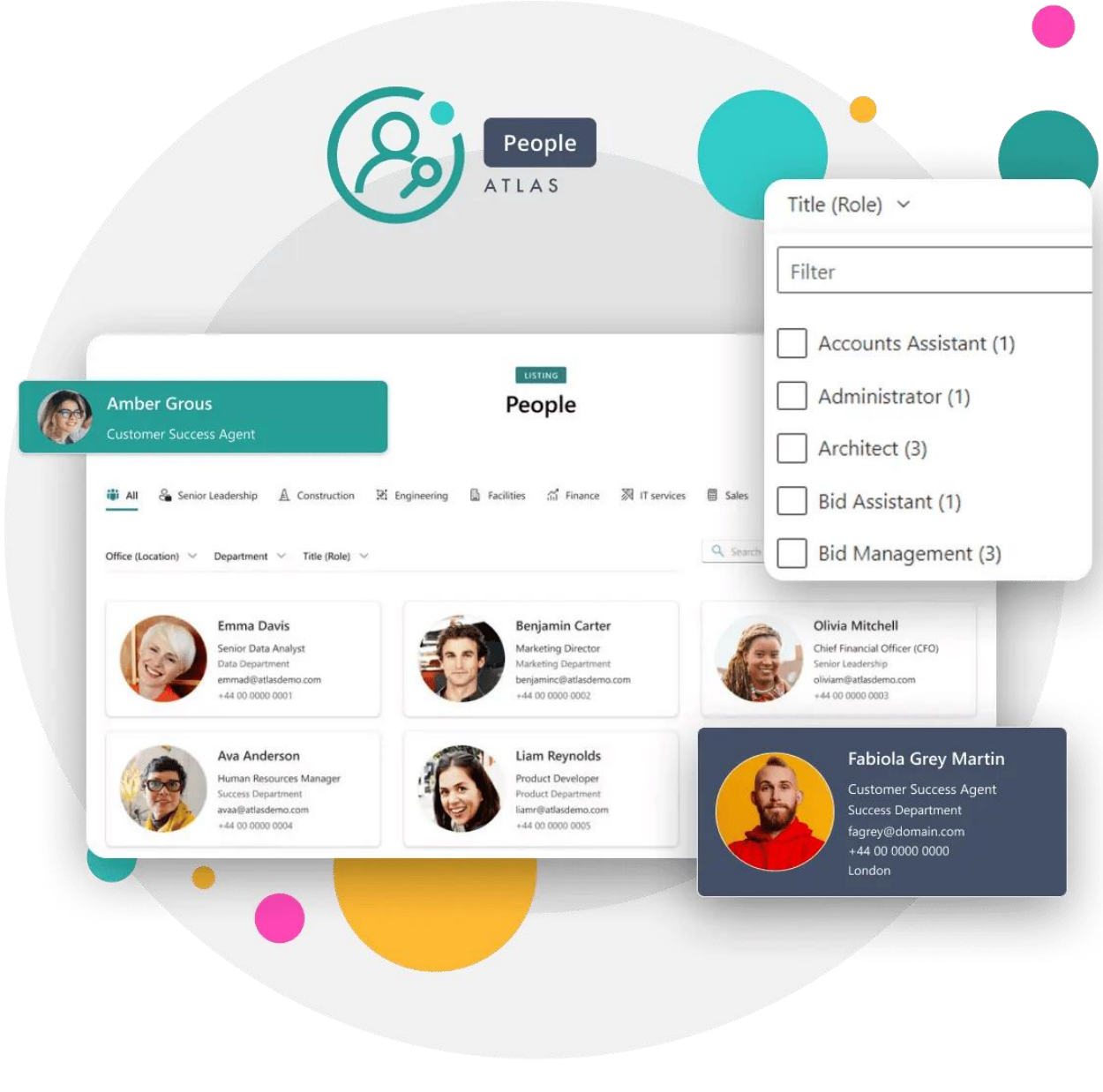
Chat to us



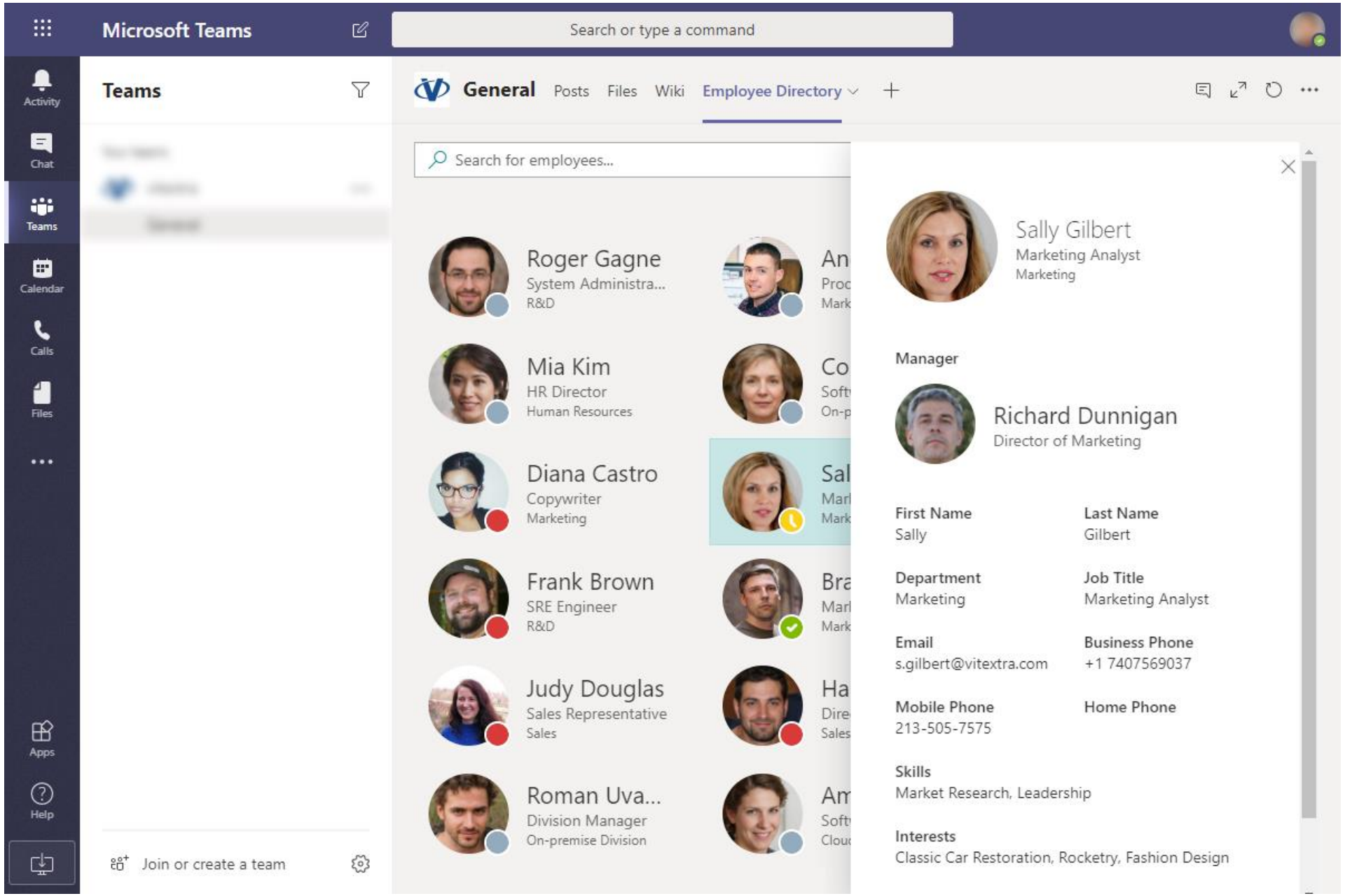
[Staff Directory - Cloudwell]



[SharePoint Employee Directory | Office 365 Employee Directory (saketa.com)]



[Atlas Employee Directory for Microsoft 365 | ClearPeople]



[Employee Directory for SharePoint Online - Vitextra]

vitextra

PRODUCTS DOWNLOADS SUPPORT COMPANY SIGN IN

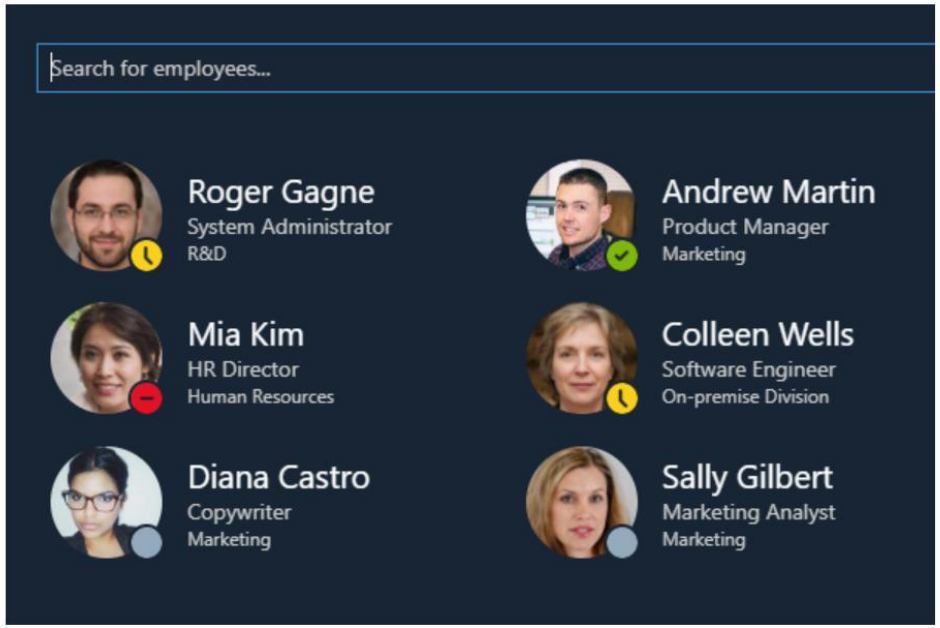
Web Part to search users within SharePoint Online User Profiles as well as Azure AD.

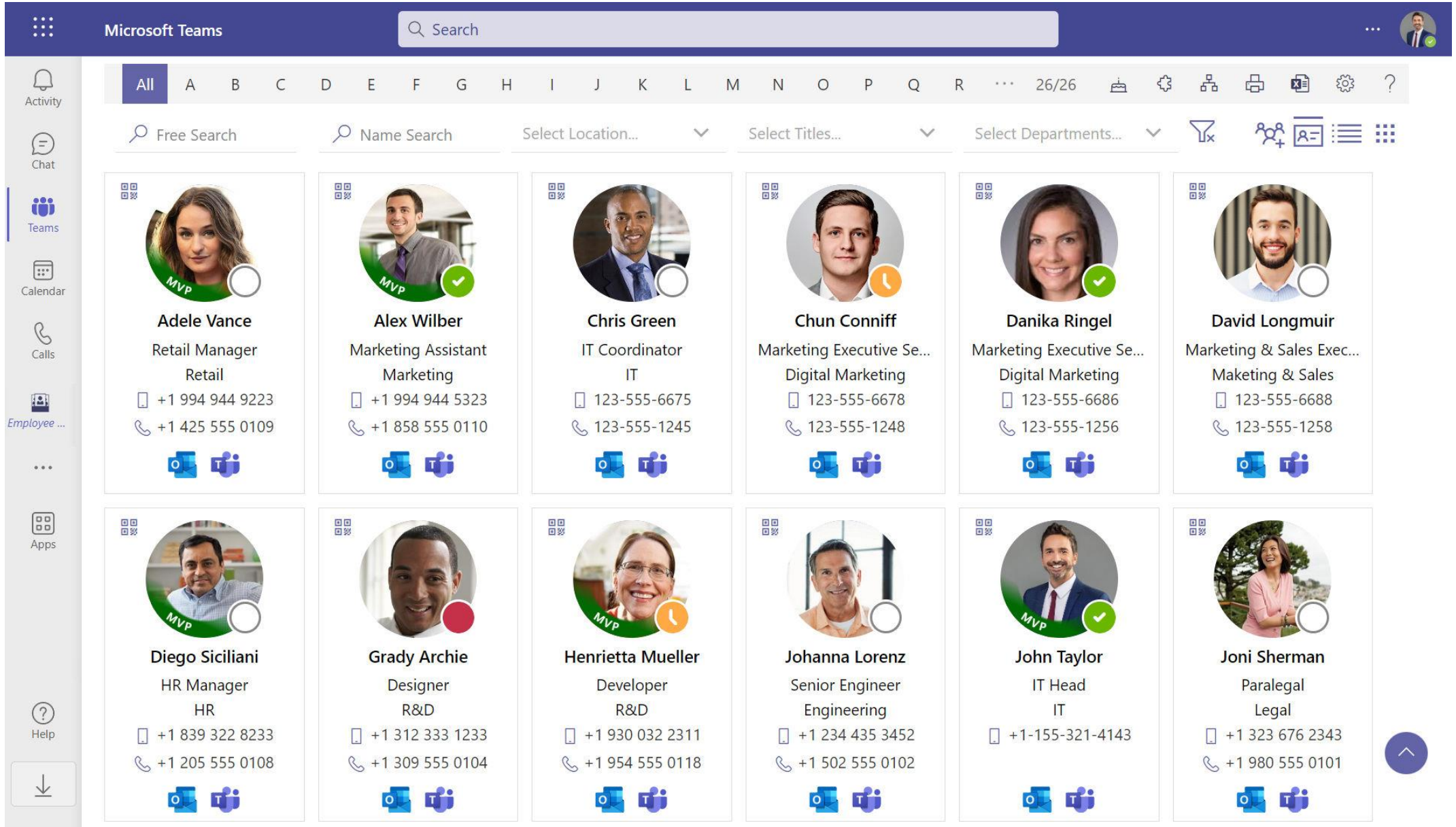
- ✓ Microsoft Teams Integration
- ✓ User Presence
- ✓ Single Part App Pages
- ✓ Supporting Dark Mode
- ✓ Search People within User Profiles
- ✓ Search People in Azure AD

MONTHLY ANNUAL

SIGN IN

$499 /year





[SharePoint Employee Directory I Best SPFX Teams App HR365]

Standard

$49.99

per month, billed yearly

Standard plan features

- Upto 50 users
- 2 Support tickets per year
- Free updates via Microsoft store
- Alphabet filtering
- 1 Exclude options
- 1 Search options
- Mobile responsiveness
- Auto sync data from M365

Plus

$99.99

per month, billed yearly

Everything in Standard, and...

- Upto 100 users
- 4 support tickets per year
- 3 Exclude options
- 3 Search options
- Choice to hide user properties
- Configure SIP / Call protocols
- Multiple profile image sync
- Add as web part in Intranet

Premium

$149.99

per month, billed yearly

Everything in Plus, and...

- Upto 200 users
- Add-on $50 for every 100 users
- Unlimited support
- Free updates with support
- 5 Exclude options
- 5 Search options
- Custom Fields
- Sync Active directory attributes
- Birthday and anniversary notifications
- Custom logo
- Organization chart
- Custom quick link
- Custom return page link
- Available in 10+ languages
- Modern SharePoint App
- Advance top bars filters

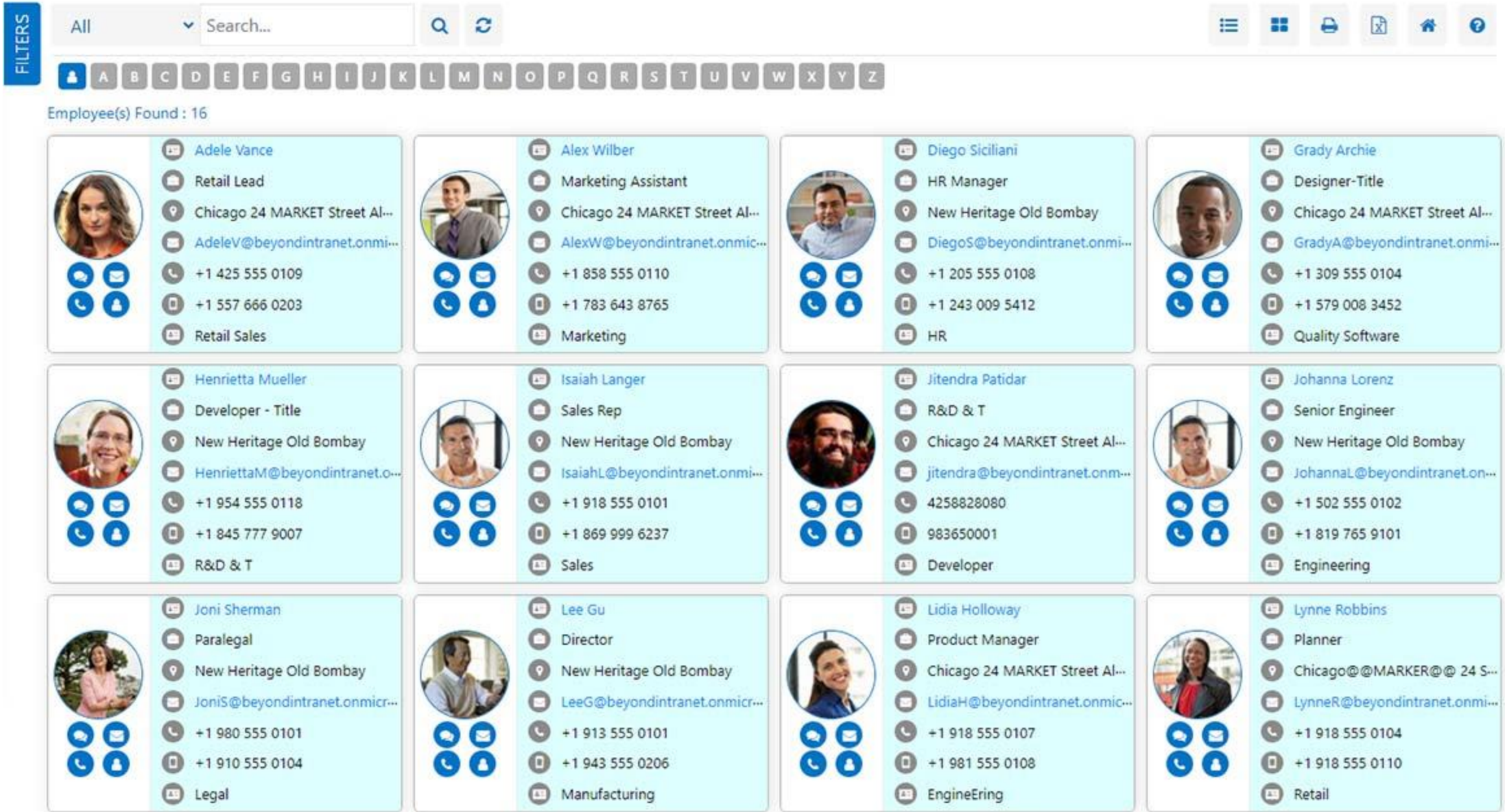
Enterprise

$249.99

per month, billed yearly

Everything in Premium, and...

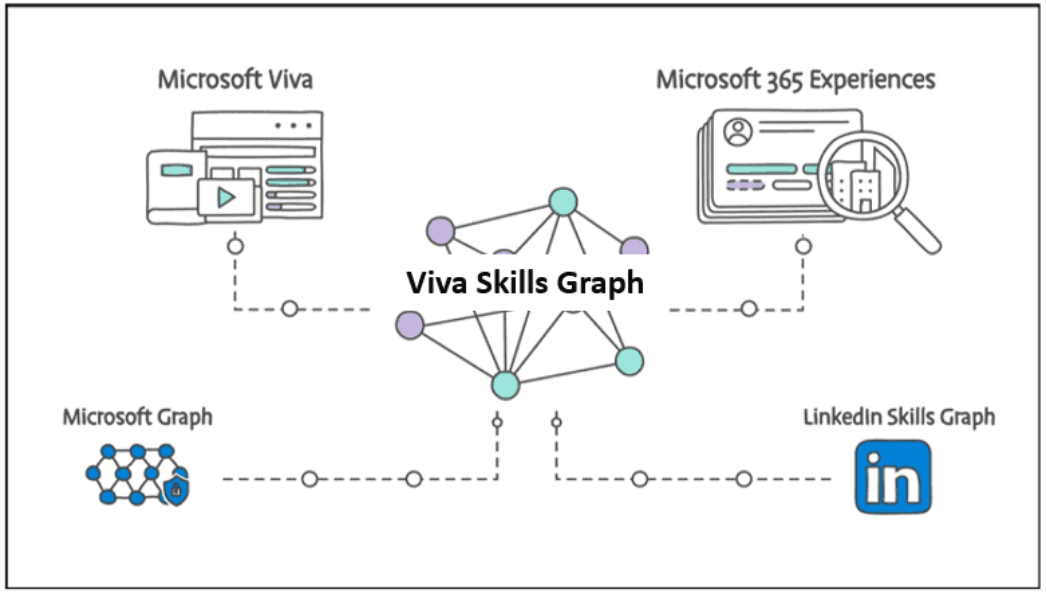
- Upto 300 users
- Add-on $50 for every 100 users
- Custom column Search
- Filters - About me, Projects, Skills
- Filters - School and Hobbies
- Quicklink to custom profile pages
- Executive Assistant relationship
- Online presence with extended status
- Calendar - free / busy information
- Profile Imaged with text frames
- Import users using CSV
- QR Code
- Exclude Bulk Shared Mailboxes
- Hide Mobile number selectively
- Guest Users
- Dashboard
- Non Microsoft 365 users
- Dedicated account manager
- One free customization*



[SharePoint Employee Directory Software | Beyond Intranet]

Viva Skills and LinkedIn Learning Integration

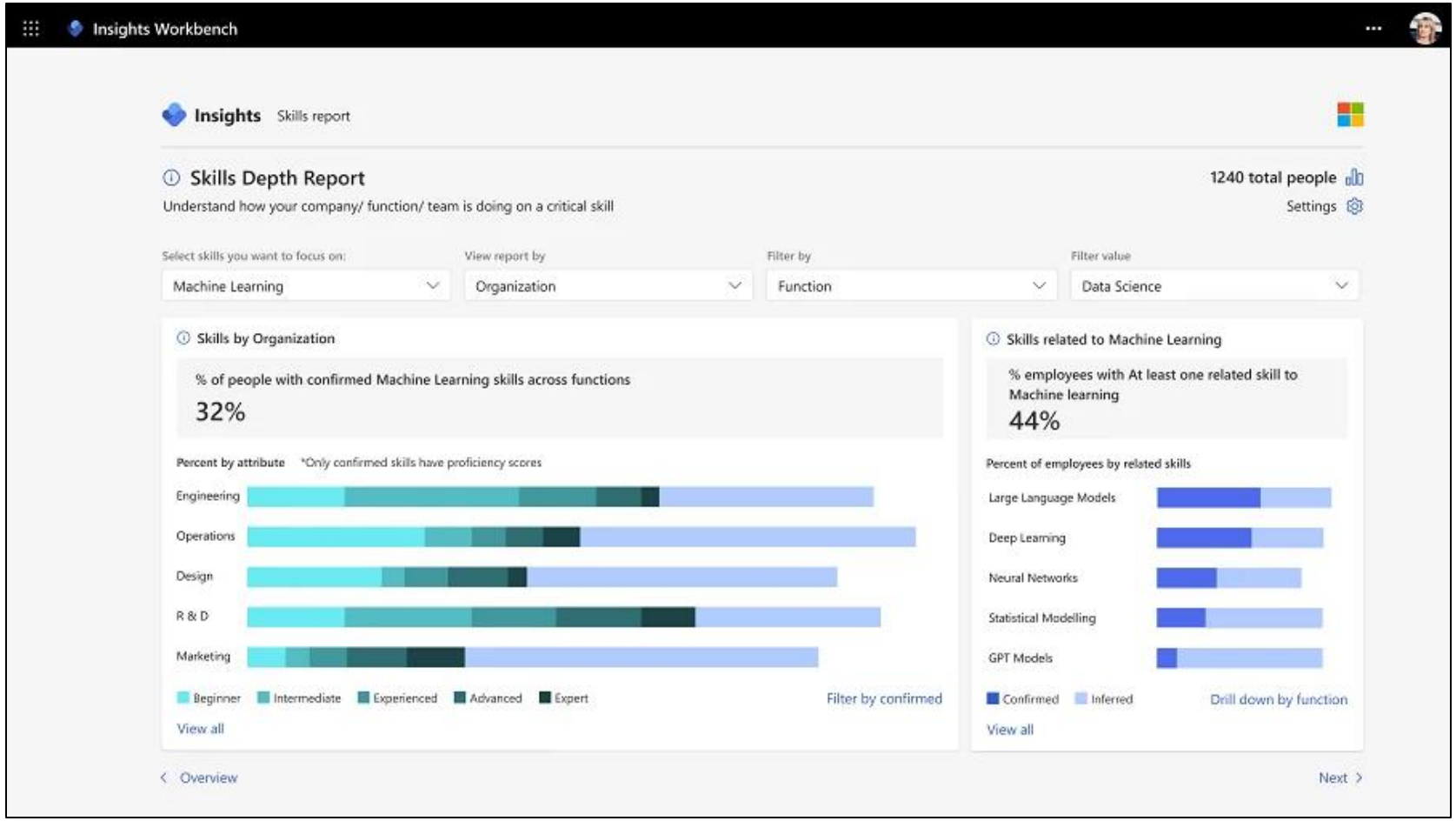
- Microsoft Viva Skills uses LinkedIn's database to understand and categorize employee skills
- Employees can easily modify and showcase skills on their Microsoft profile
- Viva suggests relevant learning courses and mentors based on individual's skills
- Can be integrated with HRIS and AD systems



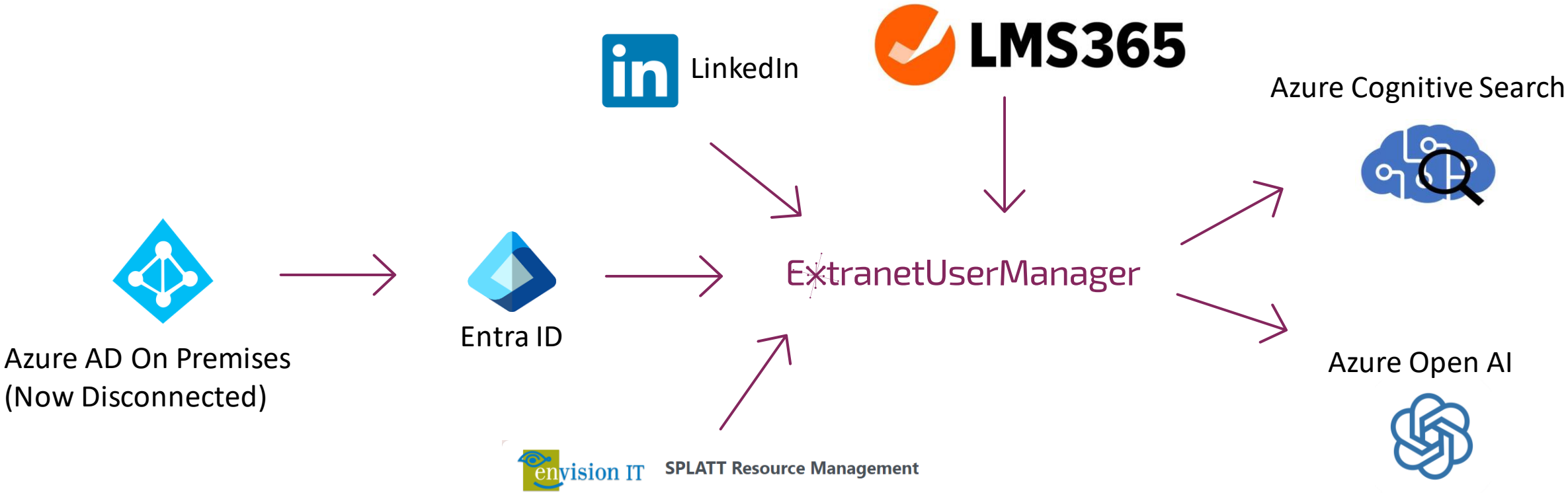
Introducing Skills in Microsoft Viva, a new AI-powered service to grow and manage talent | Microsoft 365 Blog

Why Microsoft Viva Skills Could Disrupt The HR Tech Market – JOSH BERSIN

Viva Skills Dashboard

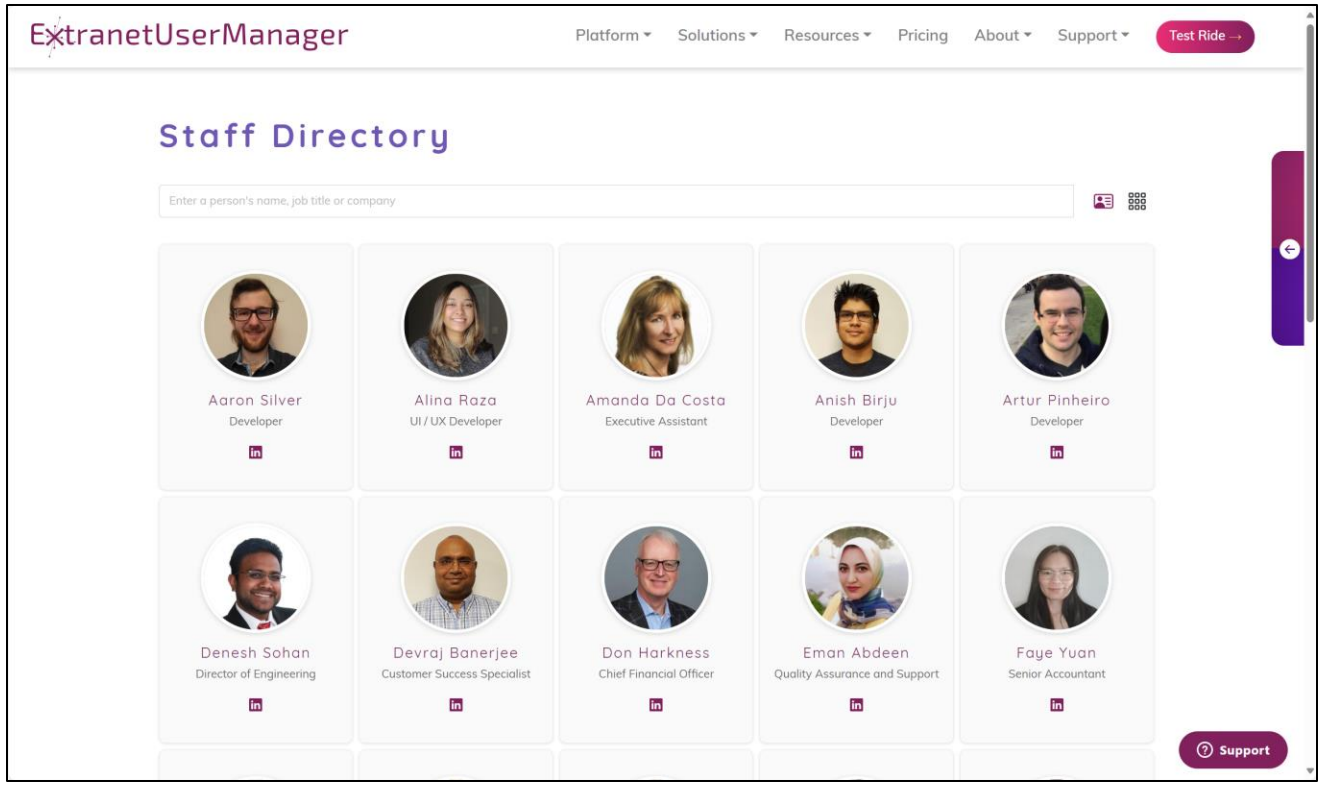


Envision IT People Data



SPLATT:
216K Unique Notes

EUM Directory



- Can be used for either member or guest accounts
- Association, board, or committee members
- Conferences

[Staff Directory | Extranet User Manager]

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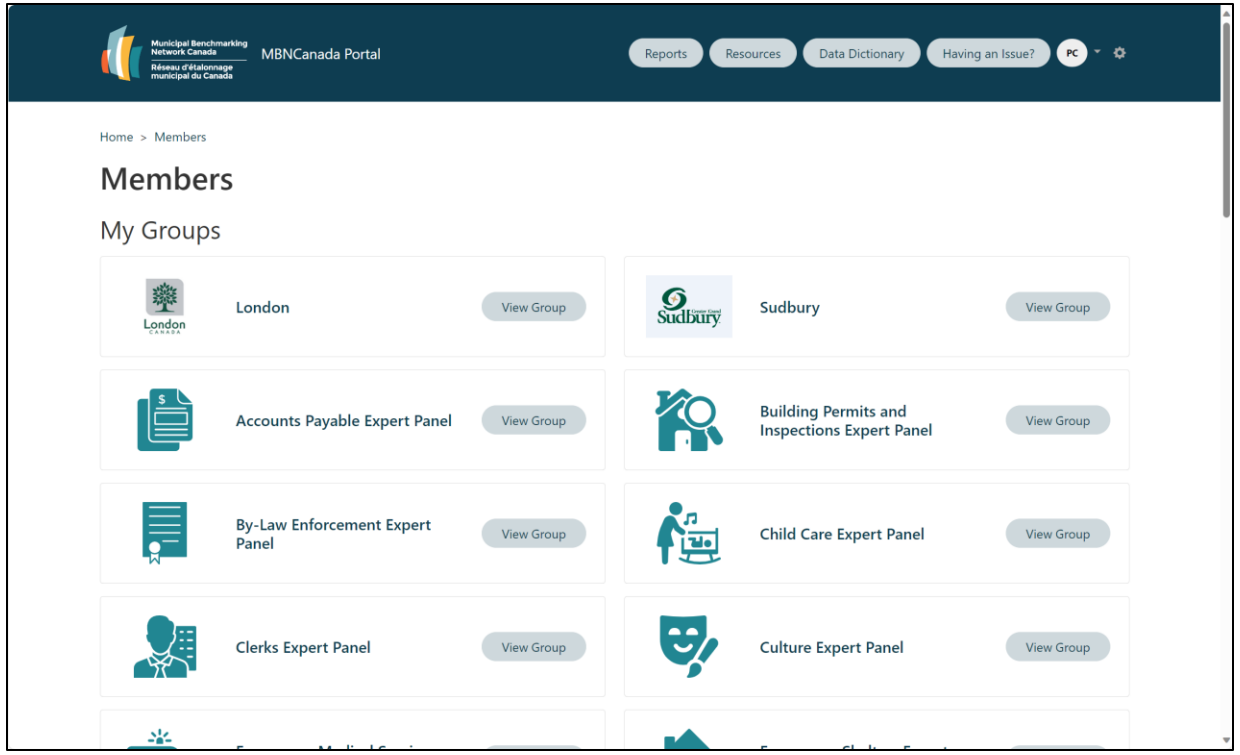
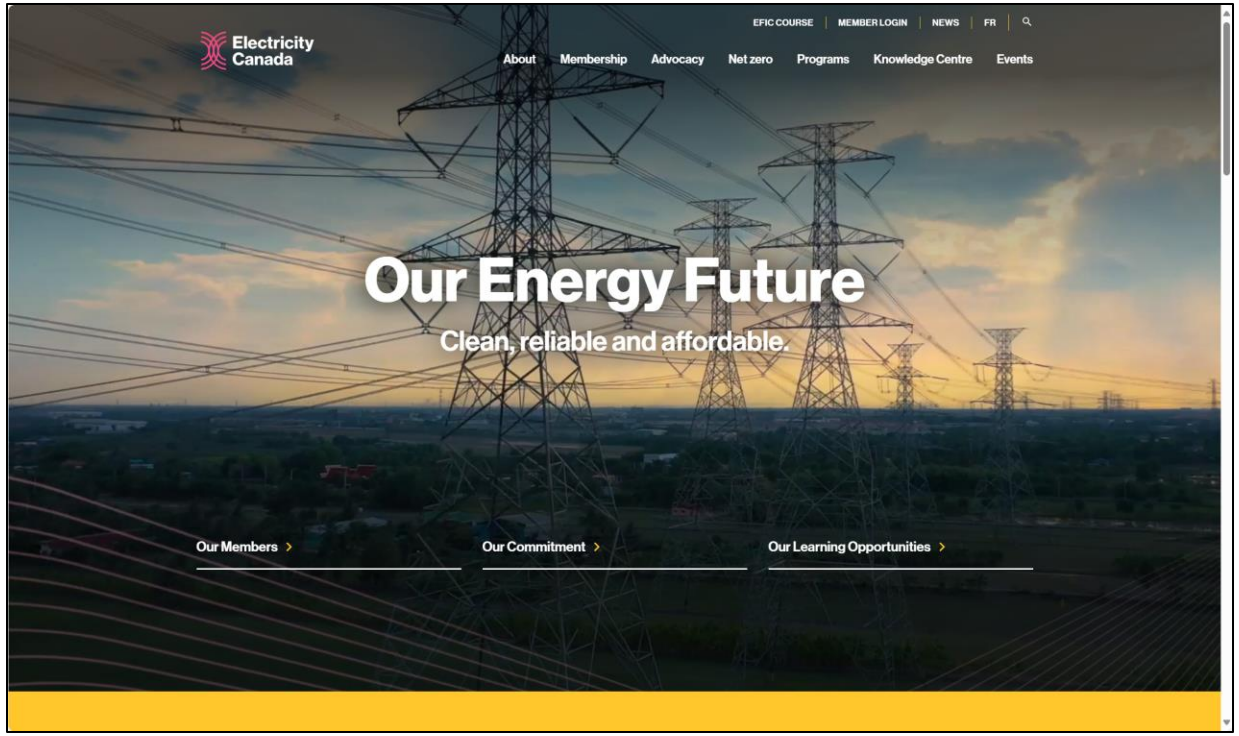
Associations

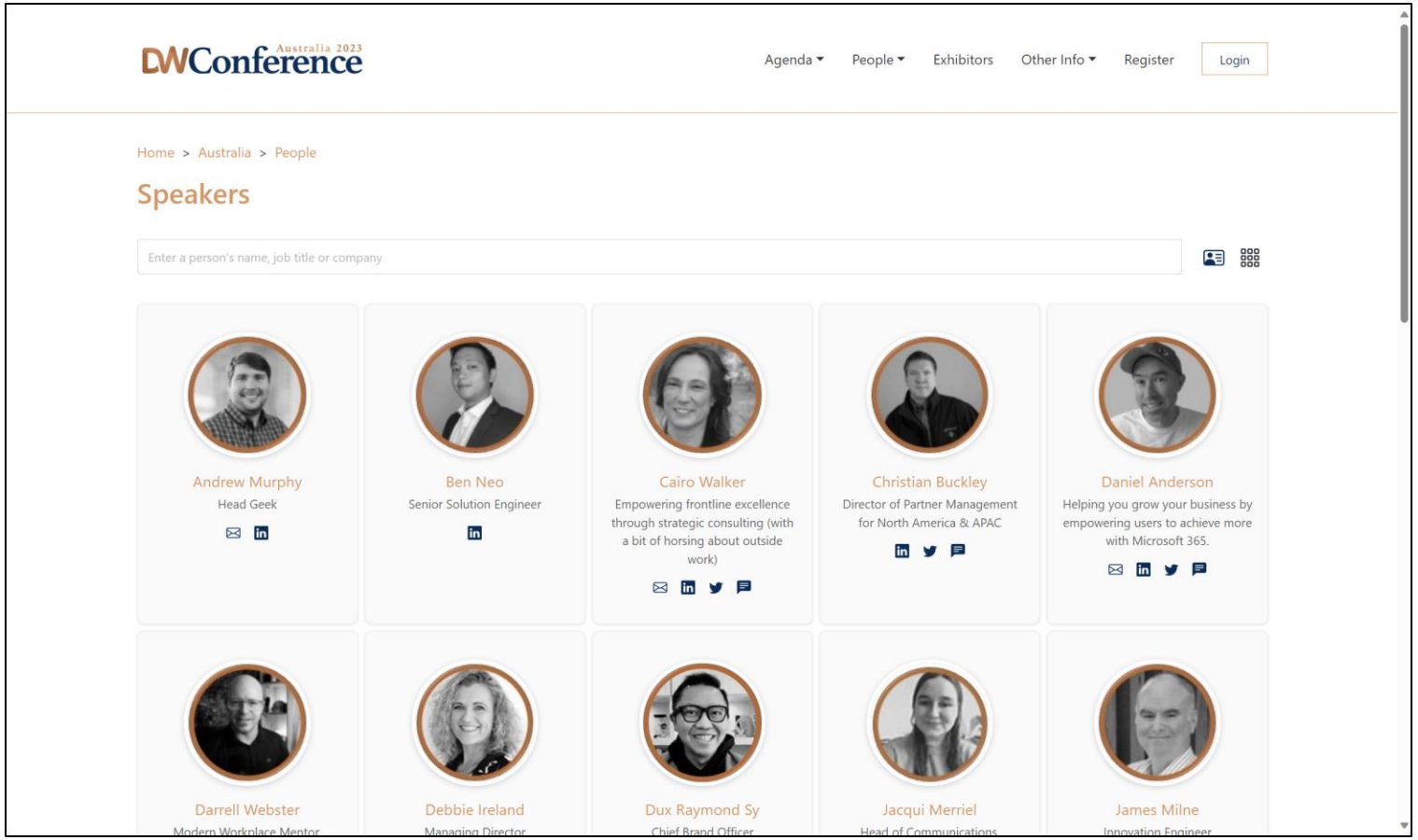


[MBNCanada]



[Home | Electricity Canada]

Conferences



[Speakers | DWCAU (eumstpp-au.azurewebsites.net)]

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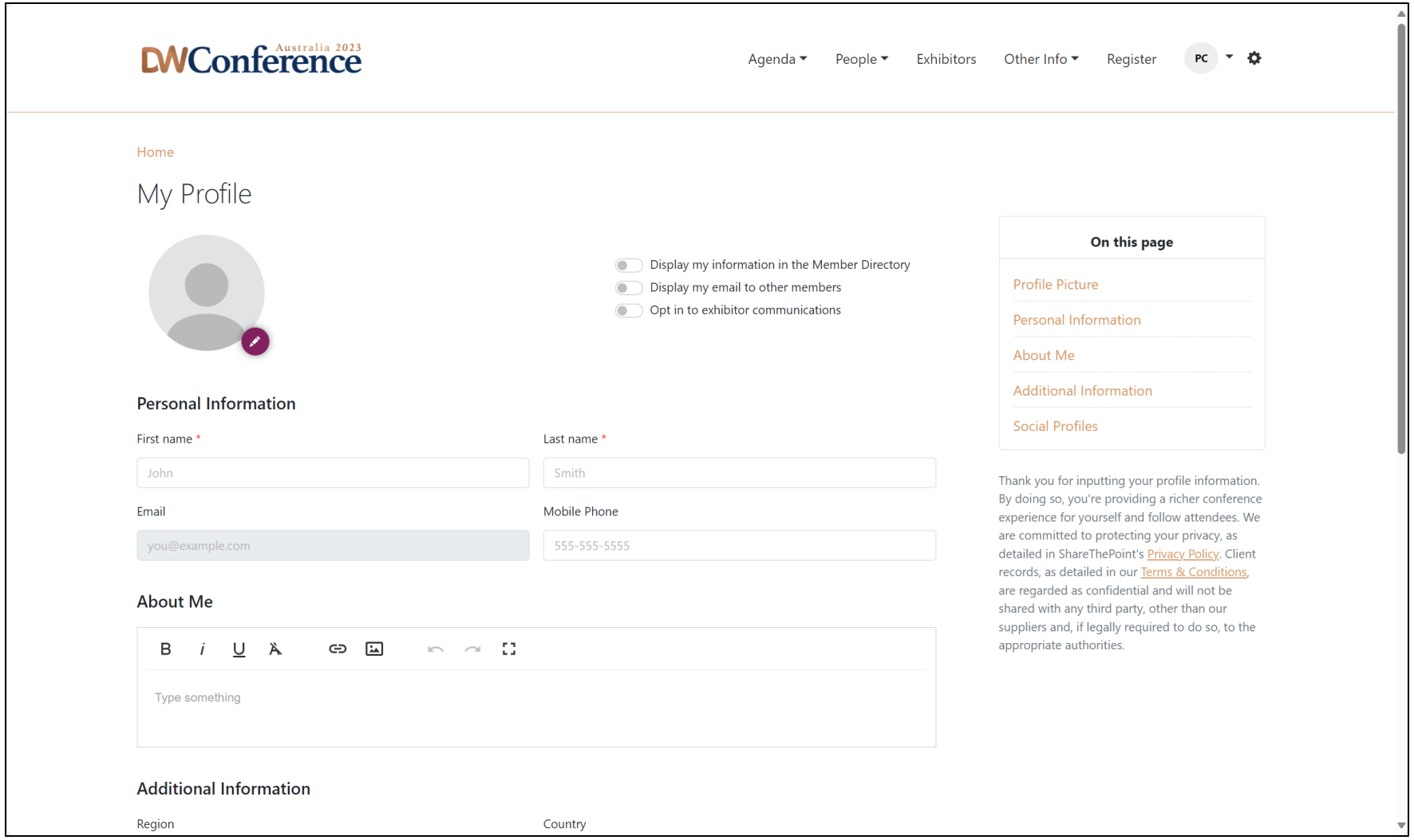
Self Service Profile Updates



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Key Takeaways

- People are the most important source of intellectual property in your organization
- Making it easy to discover and amplify employee's expertise can lead to significant value gains within your organization
- A user-friendly People Search and detailed Directory fosters a connected work environment for effective collaboration and efficient knowledge transfer
- People Search can be achieved with OOTB Microsoft, Open-Source Webparts, and third-party commercial products.
- The quality of your People Search is directly proportionate to the quality of your data source(s).

Resources

- Nov 7 Webinar - Building a Rich People Search with OOTB and Open-Source Components | Extranet User Manager
- Resources | Extranet User Manager
- MBNCanada Resources | Extranet User Manager
- Digital Workplace Conference Resources | Extranet User Manager

Thank you!

Questions?