EUROPEAN COLLABORATION
SUMMIT 2024

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

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Presentation

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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, LinkedIn, Excel?

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

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

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?

# What is Entra ID?

- **Entra:** New name for Microsoft's suite of identity and access products
- **Entra ID:** New 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

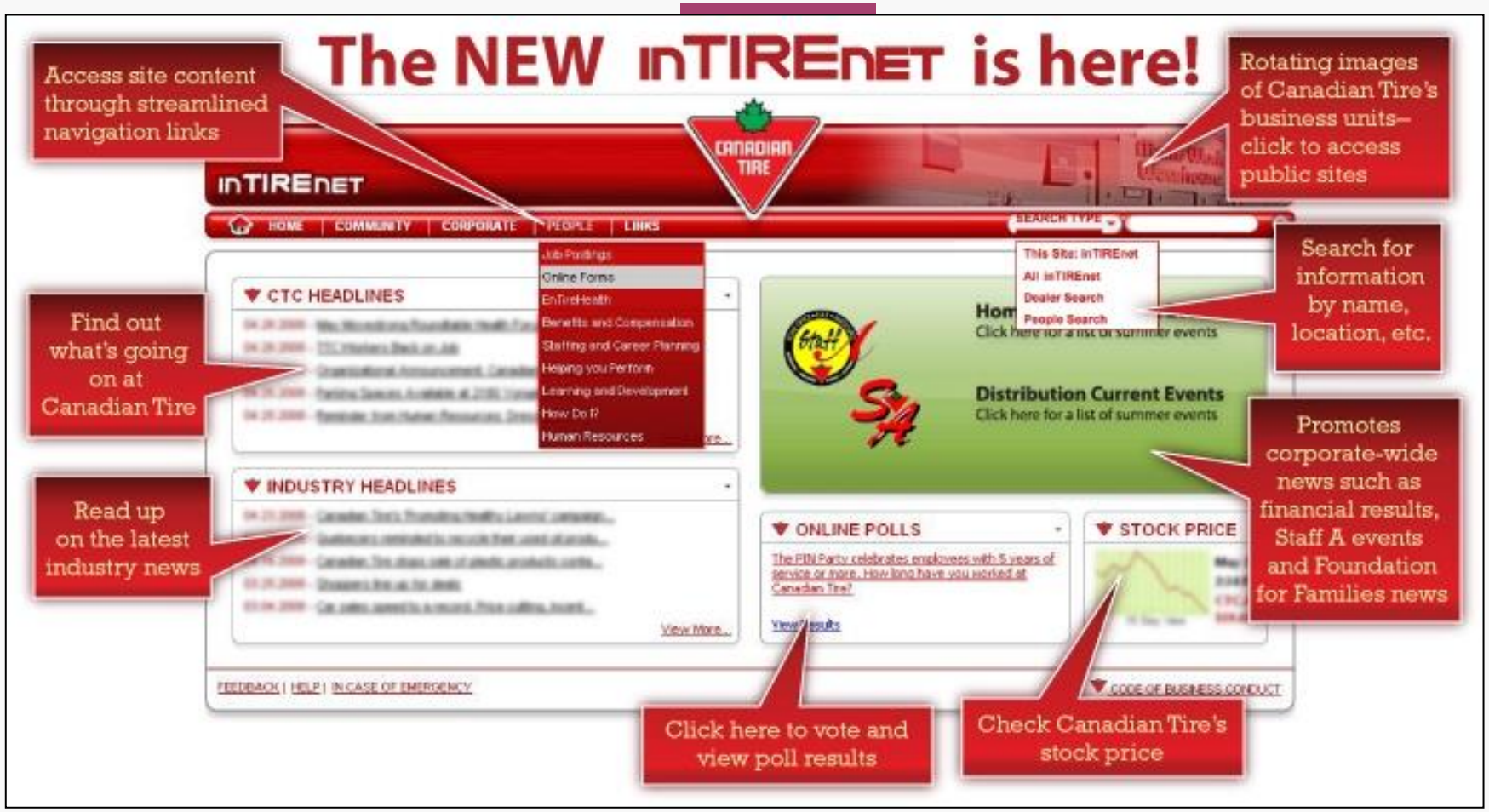
Decreased Productivity

Loss of Trust

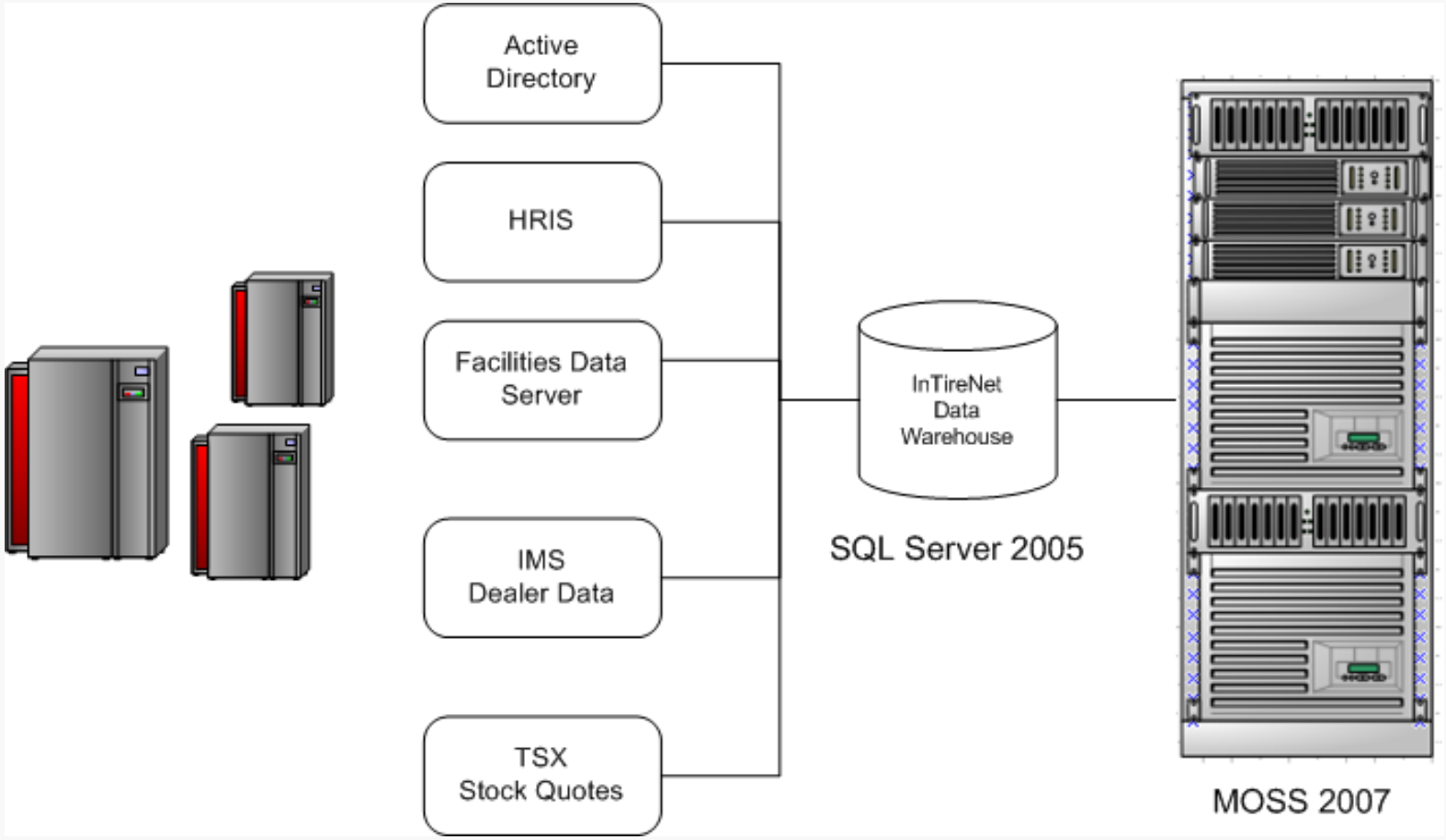
Increased Operation Cost

Decreased Data Security

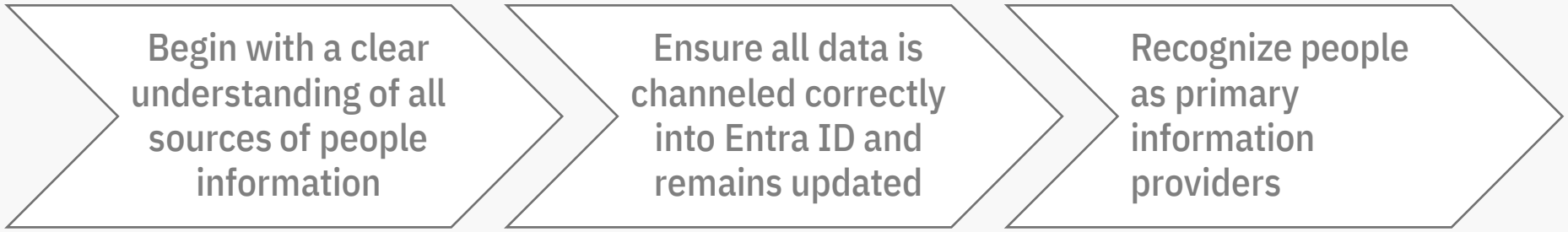
# Canadian Tire InTIREnet



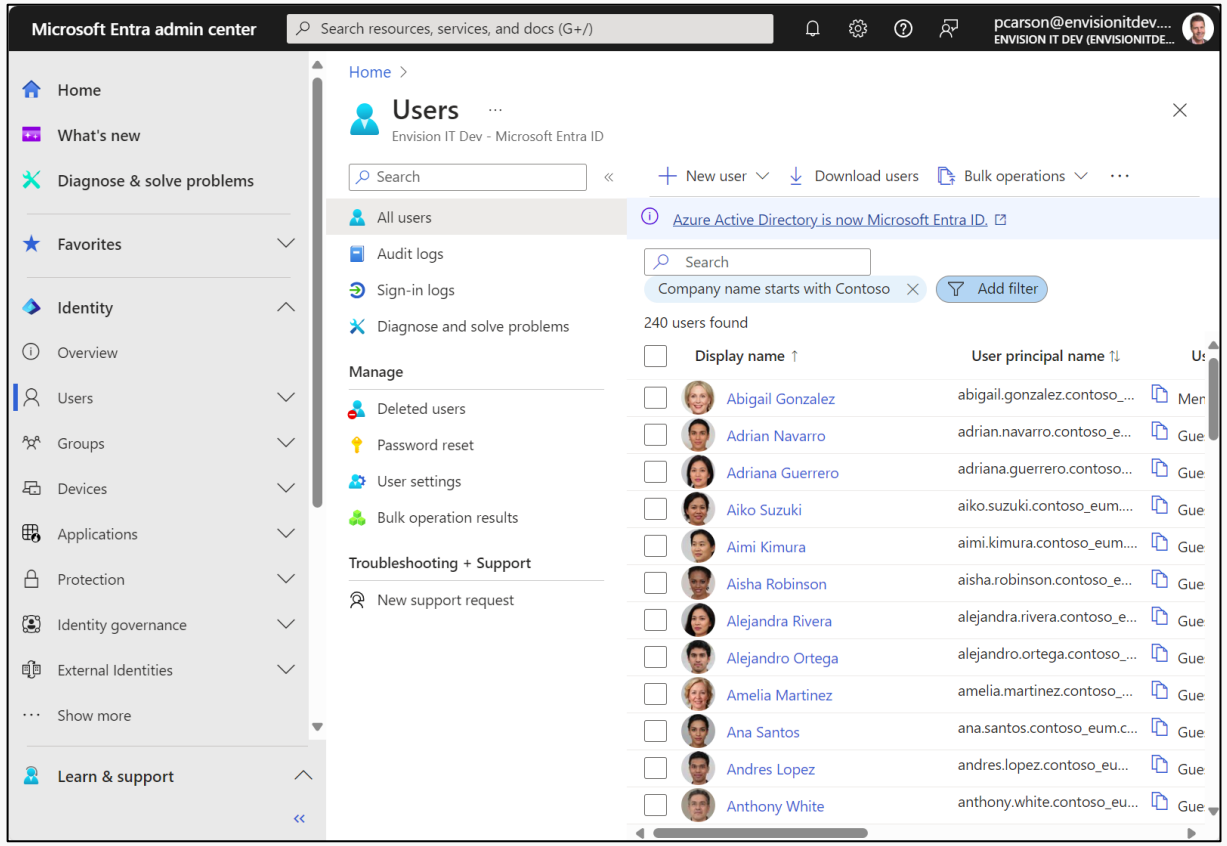
# People Data Warehouse



# Streamlining and Integrating Your Systems



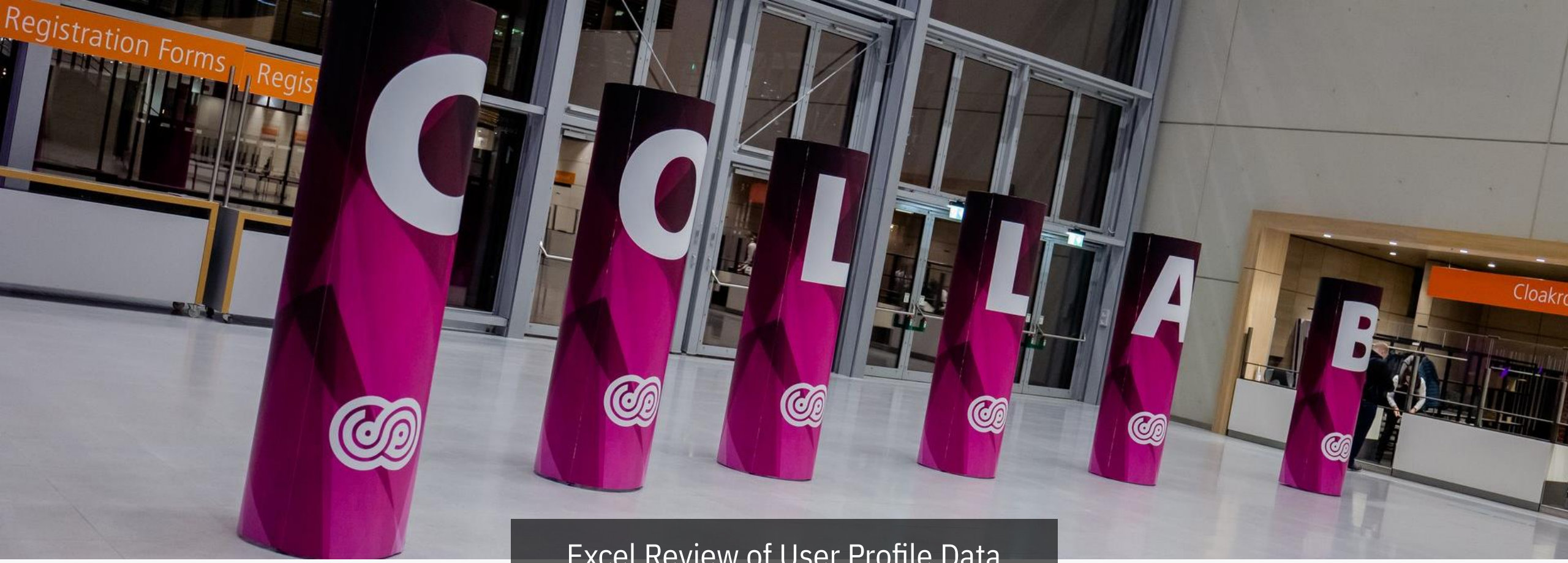
# Validating Entra ID




- Entra ID Admin Center
- Download users to CSV
- Review the CSV output in Excel
  - Turn on Data Filter
  - Look for obvious garbage data, empty columns, etc.
- Some key missing fields
  - Employee ID, type, hire date
  - Manager
  - Sponsors
  - Extension Attributes 1-15

# Big Issues

- Values that don’t match expected e.g. outliers
- Change of name (marriage / divorce)
- Crossboarding
- Long names
- Names that don’t match the euro centric AD construct firstname lastname
- How do we tell if this is the account of an employee, contractor or service bot?




Excel Review of User Profile Data

# DEMO

# Mapping the Staff Journey

- Goal is to diagram what system changes happen when
  - Someone starts
  - Someone changes job
  - Someone leaves
- IT's problem
  - "too busy"
  - Resolve the requests they get ASAP
  - Talk to IT about "identity management", "onboarding", "offboarding", "crossboarding"
- HR
  - Perception: They care about user information all the way through a staff member's life cycle
  - Reality: Too busy hiring and dealing with "challenges" to put time into data quality

*Dorje McKinnon – DWC NZ 2024*

# IT – Tell them you'll do their job!

- IT get a lot of tickets
  - My name's wrong
  - My job title isn't right
  - Fix my department
- They fix that 1 thing, over and over again
- You'll package up all those little things into a few big tickets
- You'll talk their language
- Life will be easier for them

# HR – tell them you'll give them back time!

- HR have
  - Check lists beyond measure, tell them you'll solve some of that problem
  - Too much to copy and paste, tell them you'll get some if off their plate
  - They do it over and over for every new hire

# 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**

# 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.**

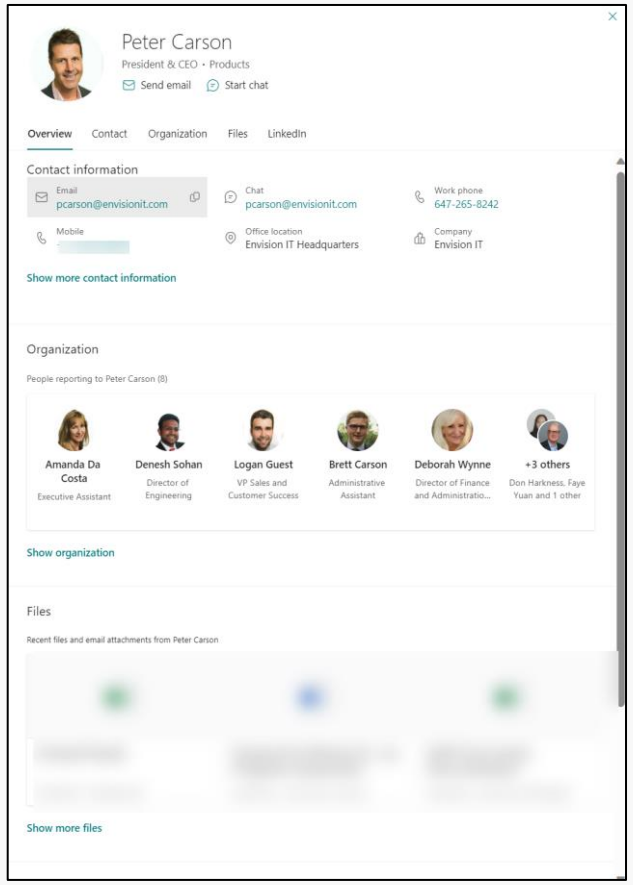
- By not tapping into their knowledge, you can lose a huge amount of potential value of your organization.
- Out-of-the-box Microsoft 365 solutions for surfacing employee knowledge:
  - Microsoft Search
  - People Cards
  - People Webparts
  - Org Chart webparts

OOTB People Search Components

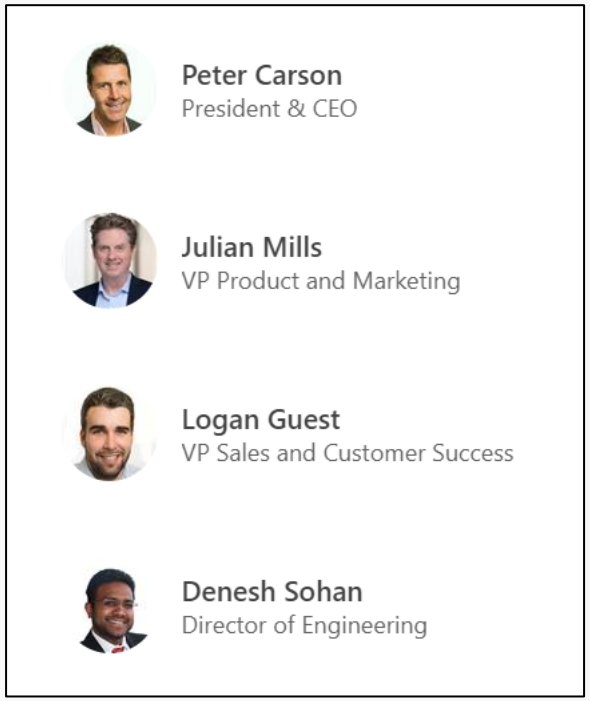
# DEMO

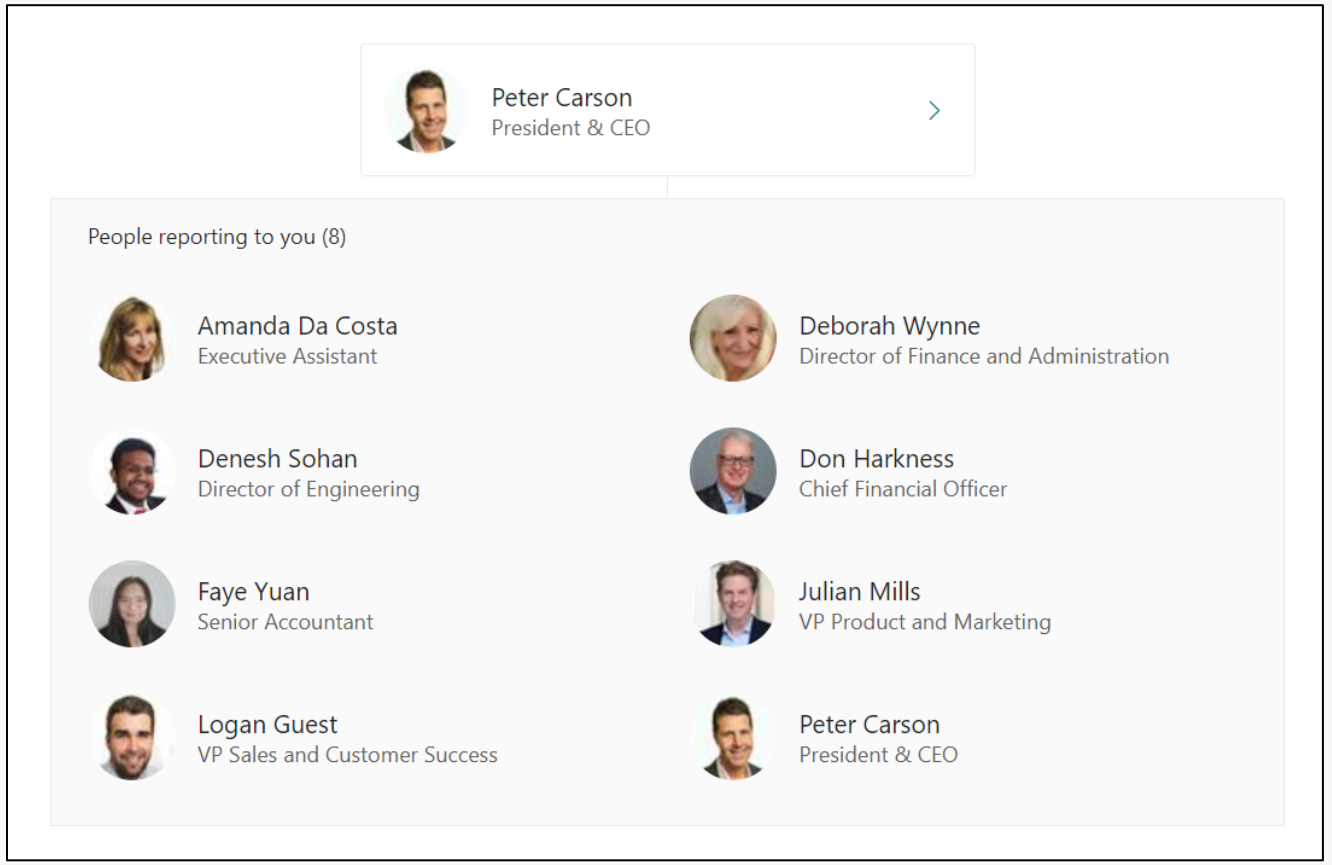
# Leveraging People Cards to Highlight People's Expertise

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



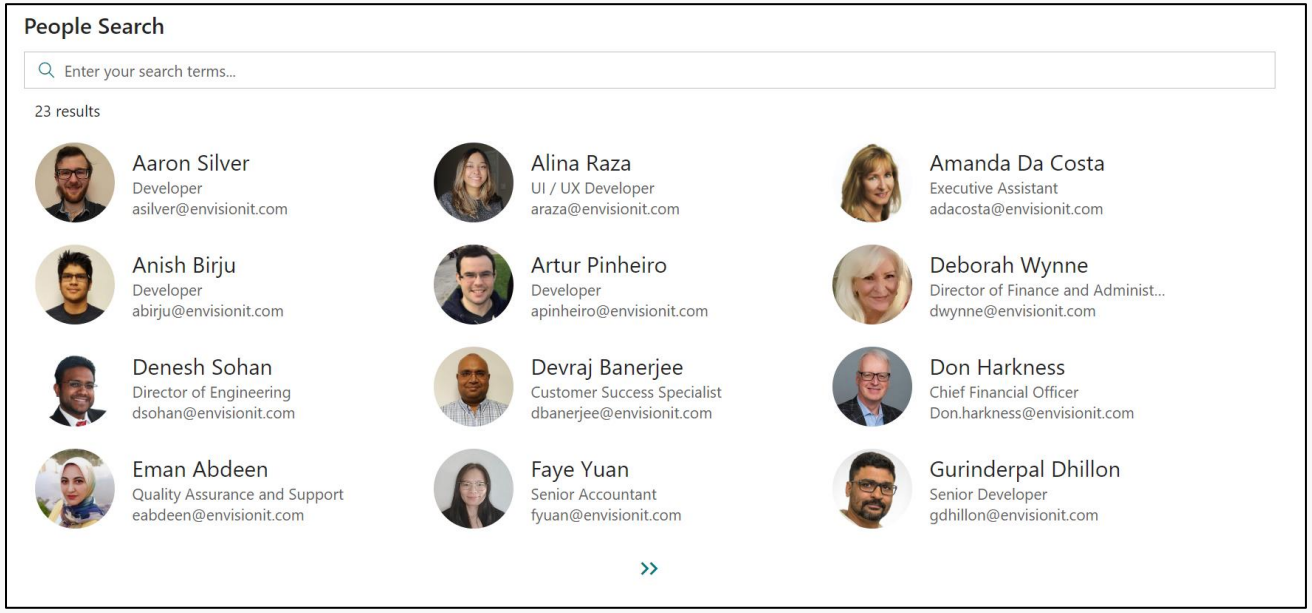
# People and Organization Chart Web Parts



# 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

# Customizing Entra ID and People Search

- ExtensionAttribute1-15
  - Available fields that can be used for any purpose
  - Can be lit up on People Cards
  - We have customized the **Graph People Search Web Part to display them**
- Open Extensions
  - Accessible through Graph
  - How EUM defines custom fields

# 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

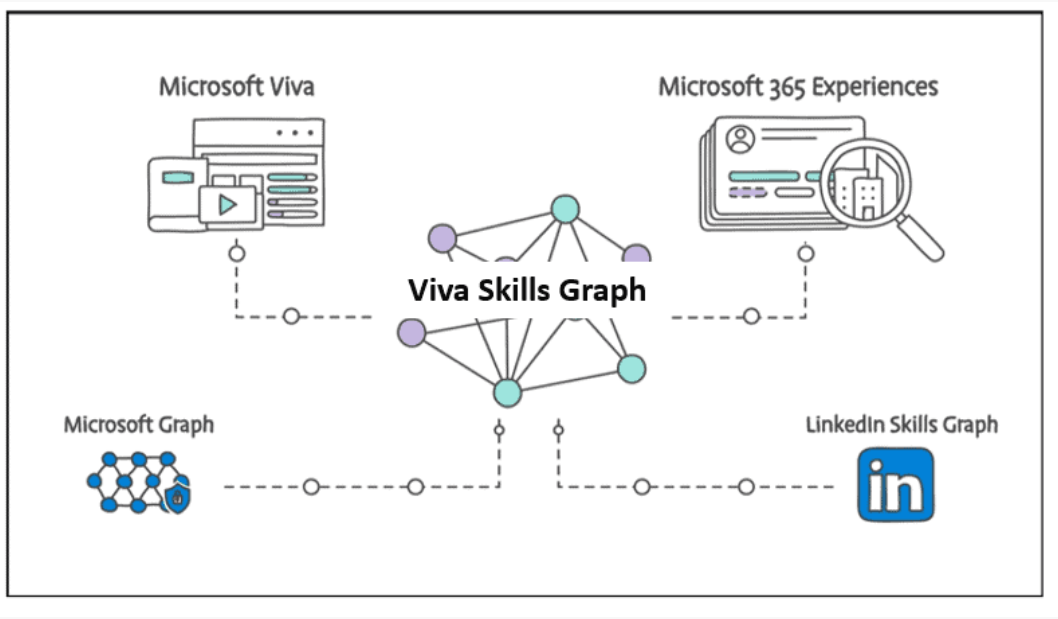
HR365 SharePoint Employee Directory

beyond INTRANET

Beyond Intranet SharePoint Employee Directory

# Viva Skills and LinkedIn Learning Integration

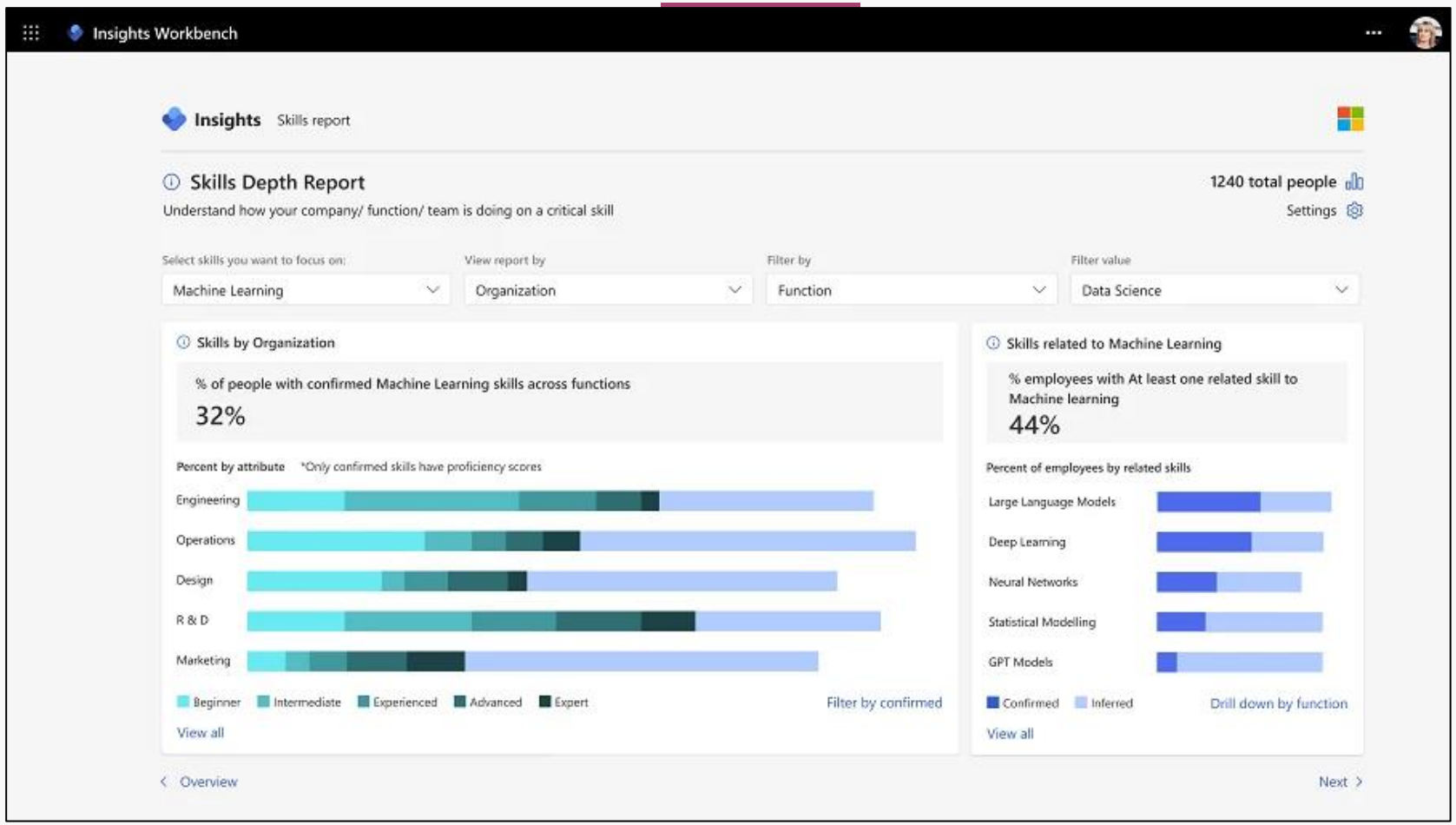
- Microsoft Viva Skills uses LinkedIn's database to understand and categorize employee skills
- Employees can easily modify and showcase skills on their Microsoft profile
- Viva suggests relevant learning courses and mentors based on individual's skills
- Can be integrated with HRIS and AD systems



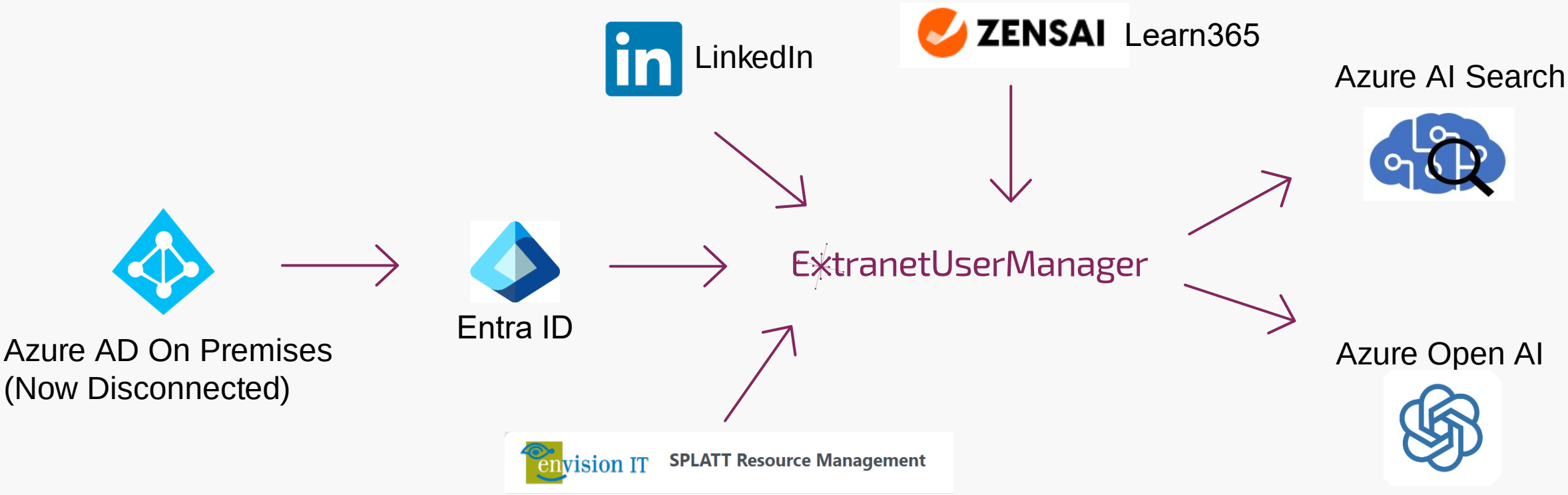

Introducing Skills in Microsoft Viva, a new AI-powered service to grow and manage talent | Microsoft 365 Blog

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

# Viva Skills Dashboard



# Envision IT People Data

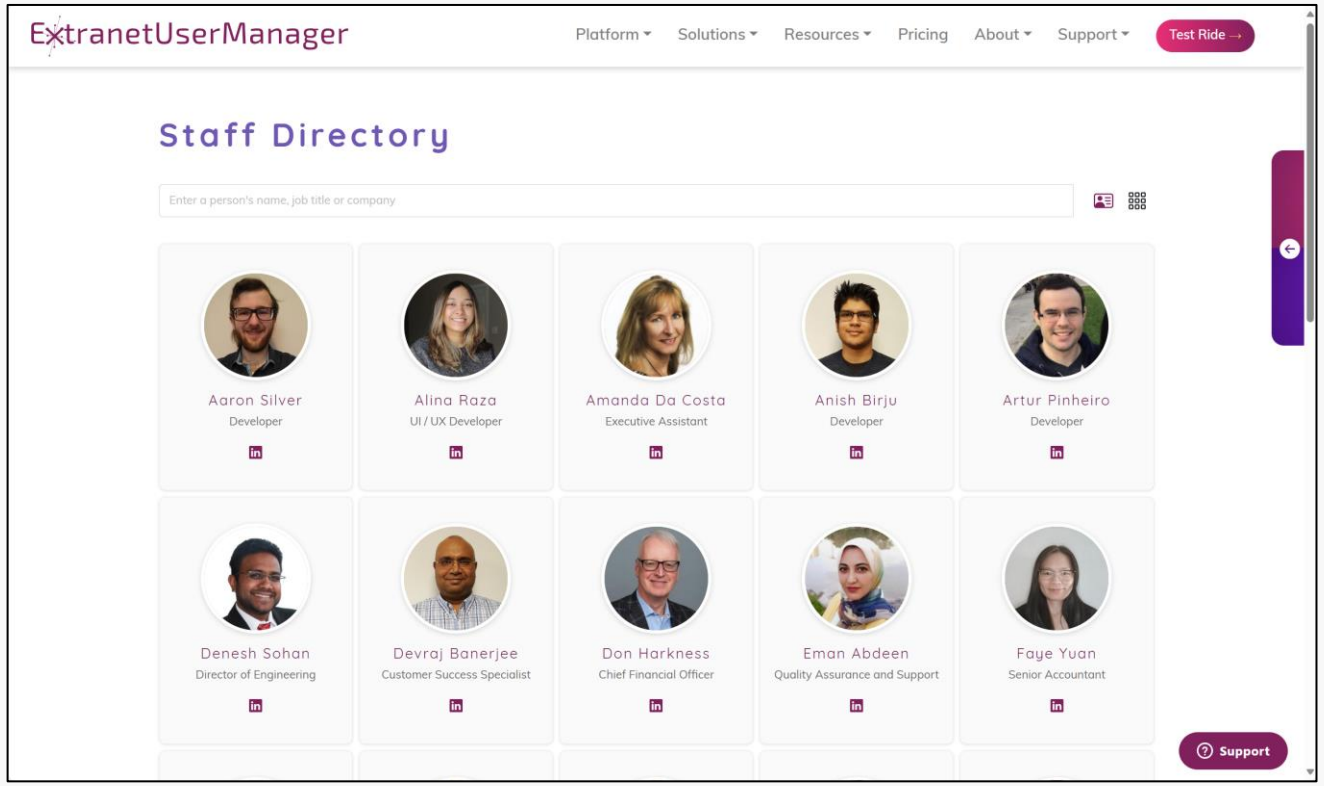



SPLATT:
**216K** Unique Notes

EUM People Search

# DEMO

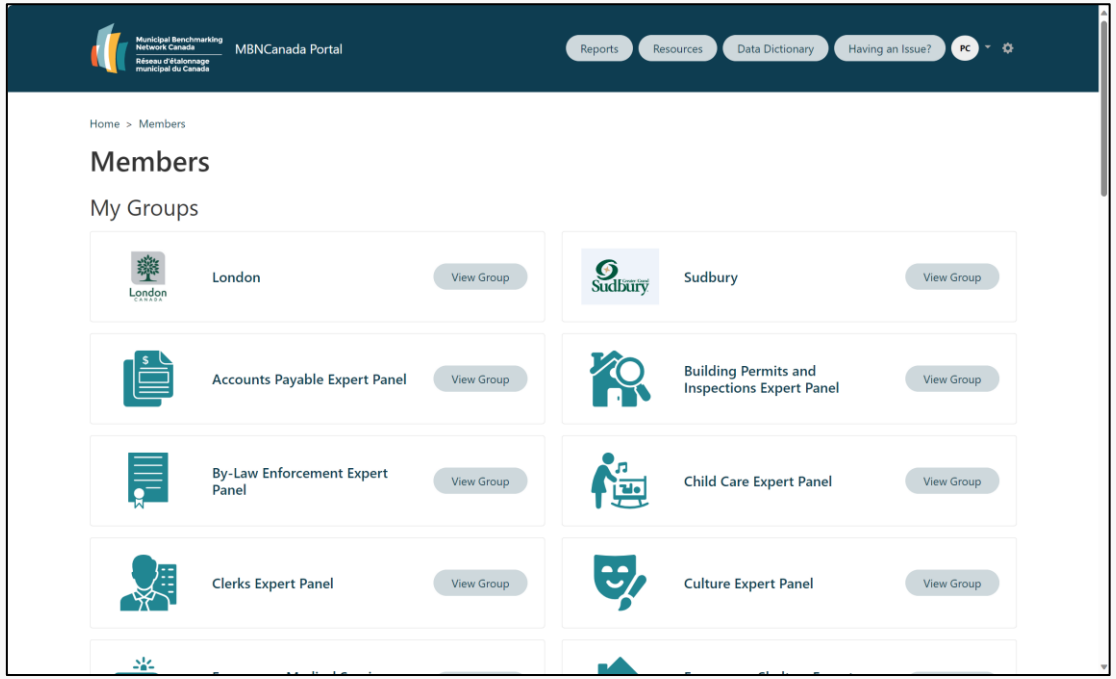
# EUM Member Directory



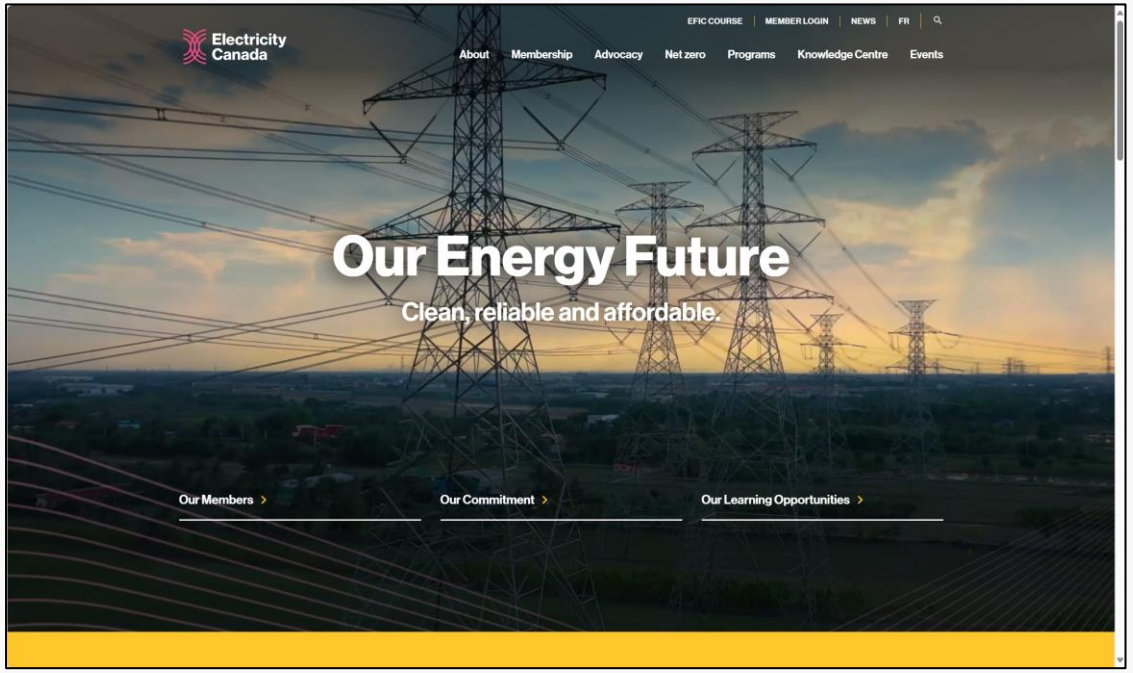

- Can be used for either member or guest accounts
- Association, board, or committee members
- Conferences

Staff Directory | Extranet User Manager

# Associations

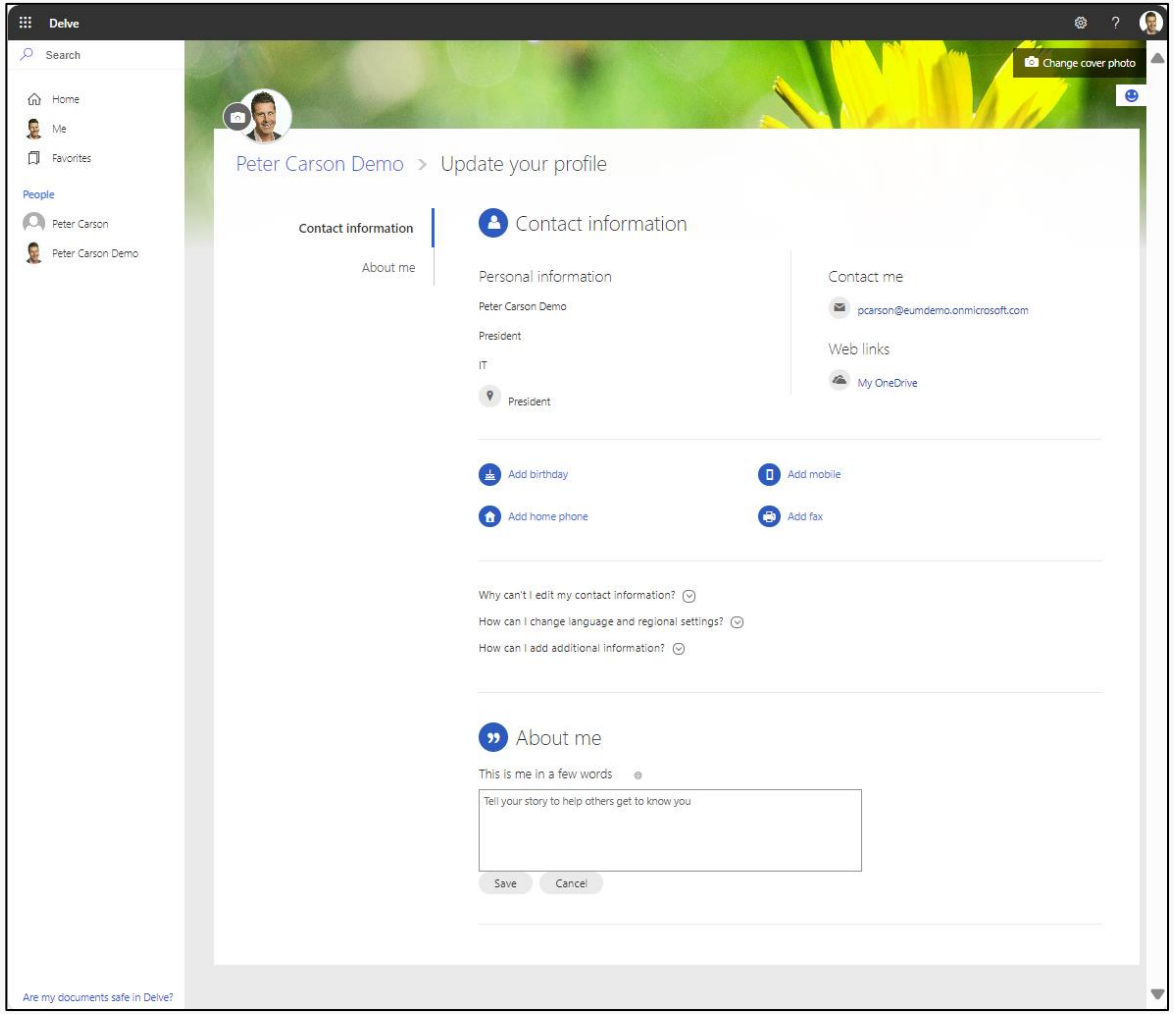



MBNCanada




Home | Electricity Canada

# Delve – Update Your Profile




- Most fields are display only
  - Controlled by IT
- Profile picture update
- Additional profile information
  - About me
  - Projects
  - Skills
  - Education
  - Interests

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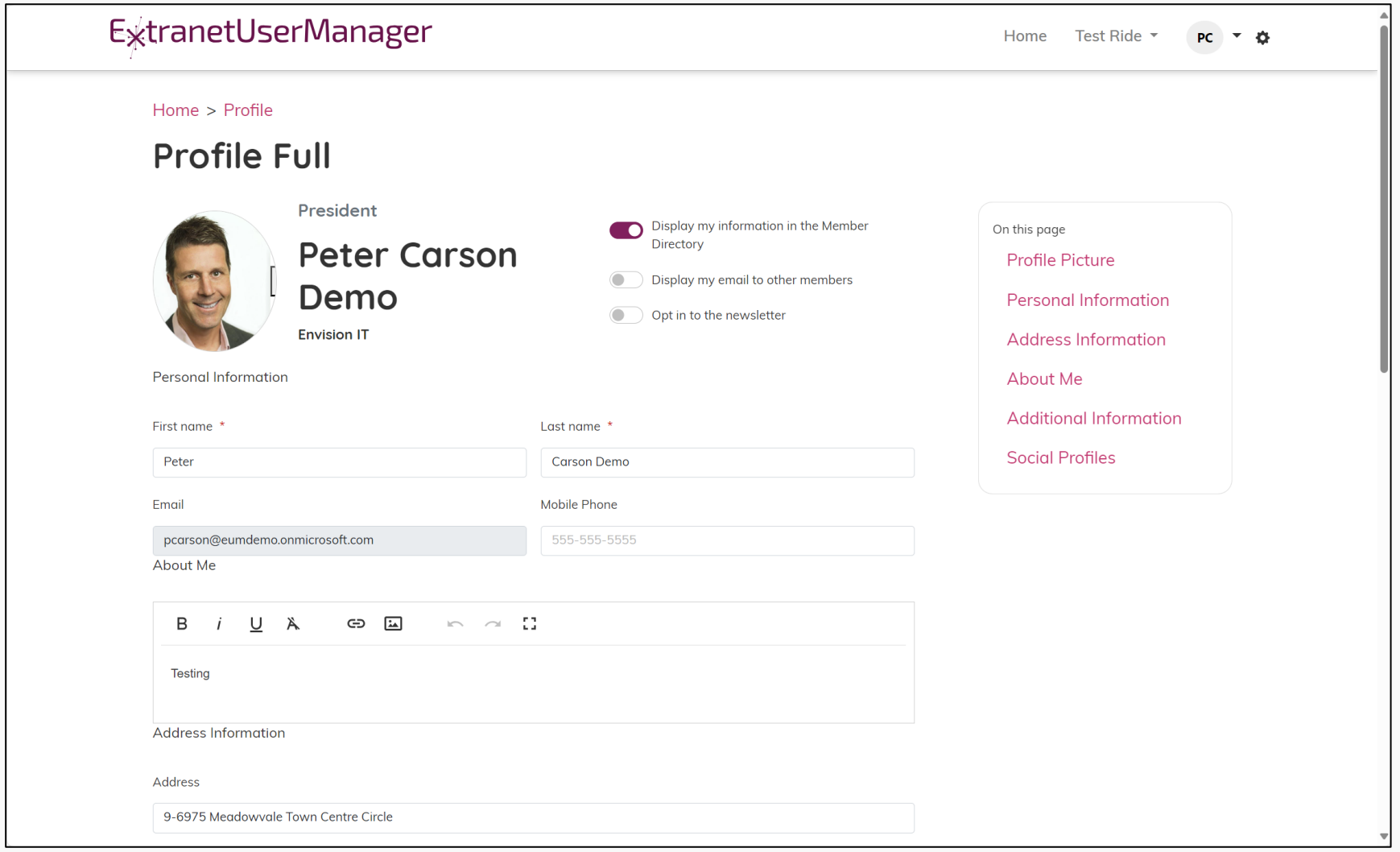
# EUM Self Service Profile Updates



# 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
- Power BI Azure AD Users and Groups Dashboard Technical Guide | Extranet User Manager
- YannickRe/spfx-msgraph-peoplesearch: Show and search users from your organization with an SPFx web part, through Microsoft Graph. (github.com)

# THANK YOU,
# YOU ARE AWESOME ❤️

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