

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

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Presentation













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?



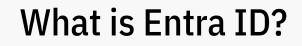
Identifying Sources of Information

EUROPEAN COLLABORATION SUMMIT

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?

EUROPEAN COLLABORATION SUMMIT



- 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

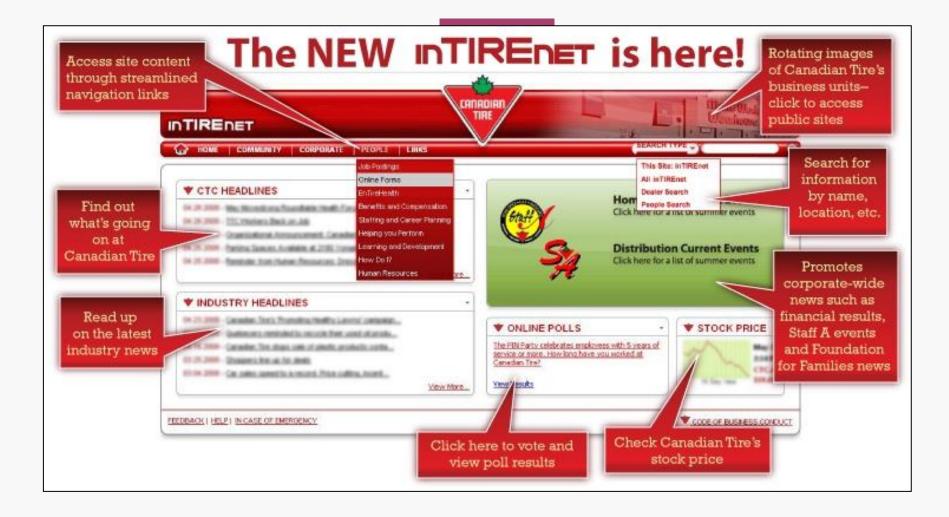


Data Disarray: The Consequence of Non-Integrated Systems



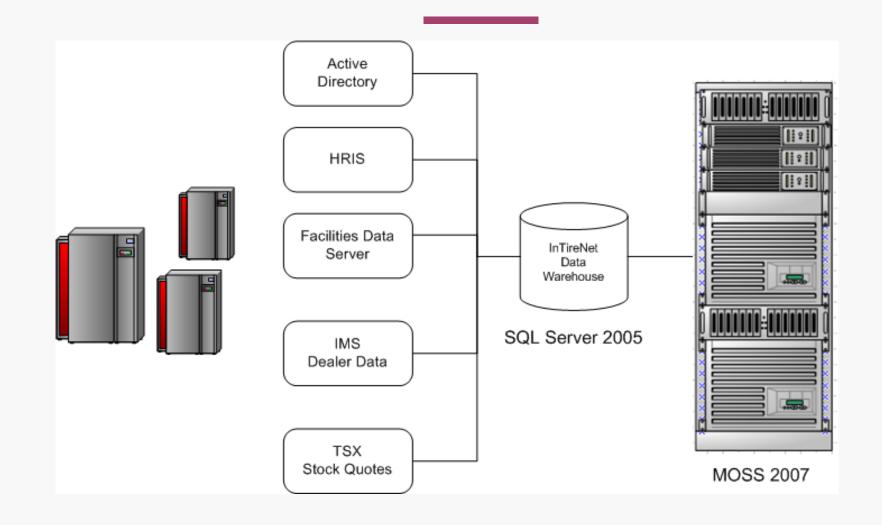


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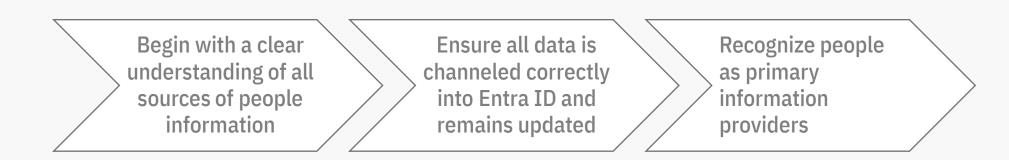


People Data Warehouse





Streamlining and Integrating Your Systems





Validating Entra ID

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^	Home	Î	Home > • Users …			×
++	What's new		Envision IT Dev - Microsoft Entra ID			
×	Diagnose & solve problems		✓ Search «	$+$ New user \checkmark \downarrow Download users	🕞 Bulk operations \lor	
*	Favorites	\sim	All usersAudit logs	<u>Azure Active Directory is now Microsoft</u> <u>Search</u>	Entra ID. 🗹	
4	Identity	~	Sign-in logs	Company name starts with Contoso $~\times~$		
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		~~		Anthony White	anthony.white.contoso_eu	🗋 Gue

- 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?



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

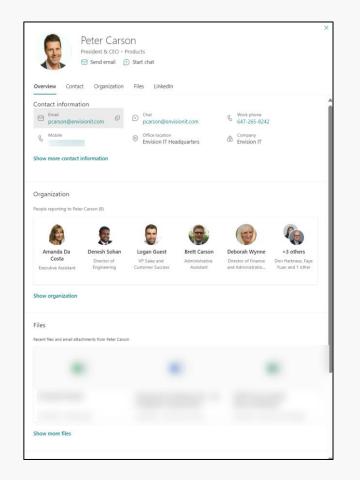


DEMO



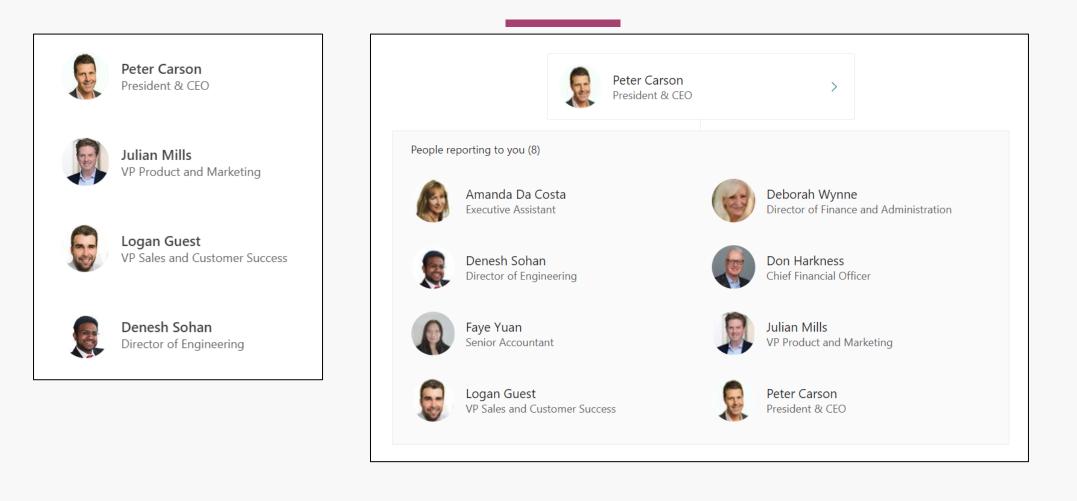
Leveraging People Cards to Highlight People's Expertise

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





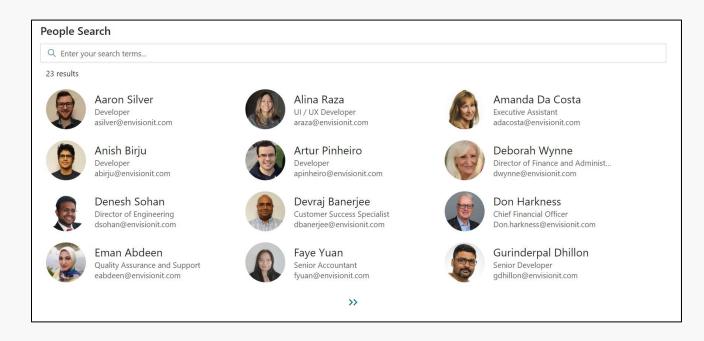
People and Organization Chart Web Parts





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 Employee Directory App



Saketa SharePoint Employee Directory



HR365 SharePoint Employee Directory



OneDirectory Employee Directory for Microsoft 365



Atlas Employee Directory



Beyond Intranet SharePoint Employee Directory CLCUDWELL

Staff Directory - Cloudwell

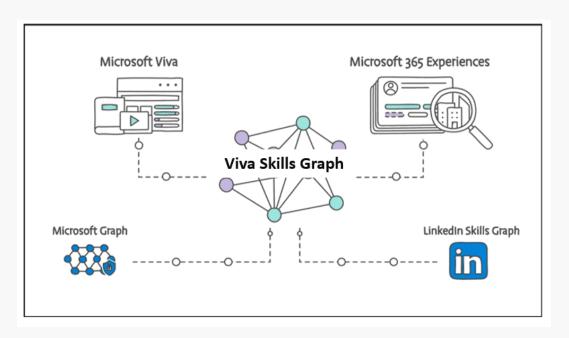


Vitextra Employee Directory



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

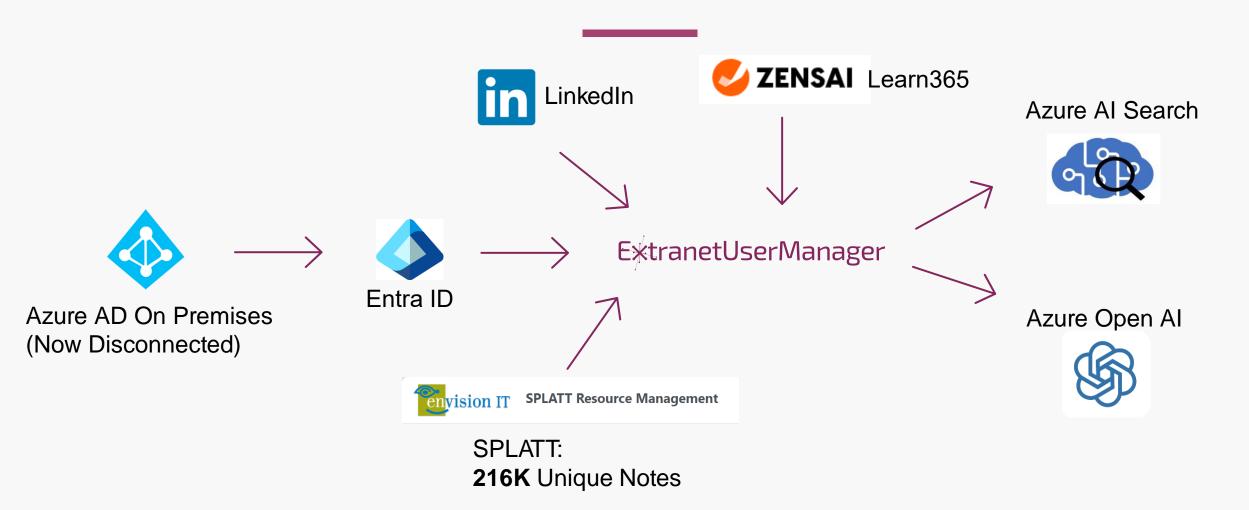


Viva Skills Dashboard

lnsights Skills report					
① Skills Depth Report	1240 total people 🚽				
Understand how your company/ function/ team	is doing on a critical skill			Settings 🔞	
Select skills you want to focus on: View report by Filter by			Filter value		
Machine Learning \sim	Organization ~	Function	✓ Data Science	e ~	
O Skills by Organization			 Skills related to Machin 	e Learning	
% of people with confirmed Machine Lear 32%	ning skills across functions		% employees with At le Machine learning 44%	ast one related skill to	
Percent by attribute "Only confirmed skills have pr	oficiency scores		Percent of employees by related	d skills	
Engineering			Large Language Models		
Operations			Deep Learning		
Design			Neural Networks		
R&D			Statistical Modelling		
Marketing			GPT Models		
Beginner 📕 Intermediate 📕 Experienced 📕	Advanced Expert	Filter by confirmed	Confirmed Inferred	Drill down by function	



Envision IT People Data

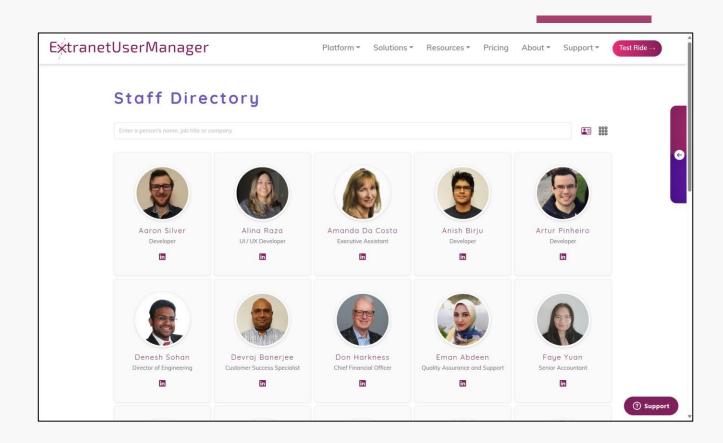




DEMO



EUM Member Directory



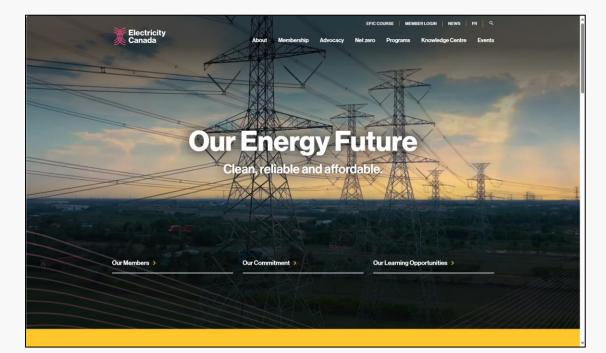
- Can be used for either member or guest accounts
- Association, board, or committee members
- Conferences

Staff Directory | Extranet User Manager



Associations

Municipal Benchn Network Canada Réseau d'étalonn municipal du Can			Reports Re:	ources Data Dictionary Hav	ving an Issue? PC 👻 🗘
Home > Members Member My Groups					
London	London	View Group	Sudbury	Sudbury	View Group
	Accounts Payable Expert Panel	View Group		Building Permits and Inspections Expert Panel	View Group
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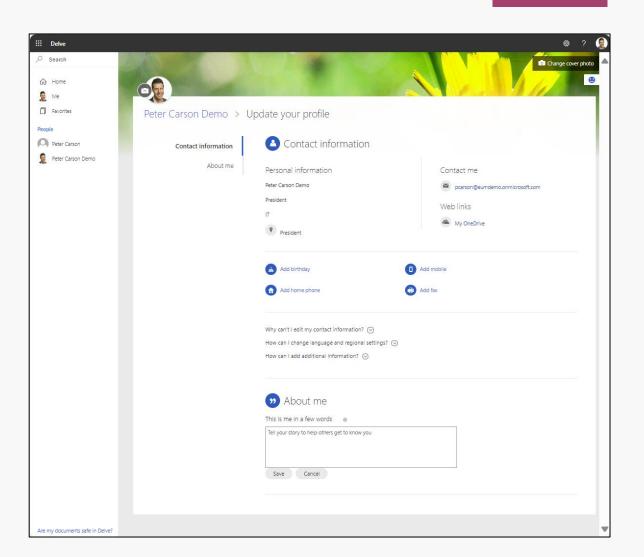


MBNCanada

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



EUM Self Service Profile Updates

Home > Profile Profile Full		
President Peter Carson Demo Envision IT Personal Information	 Display my information in the Member Directory Display my email to other members Opt in to the newsletter 	On this page Profile Picture Personal Information Address Information About Me
First name *	Last name *	Additional Information Social Profiles
Email pcarson@eumdemo.onmicrosoft.com	Mobile Phone 555-555-5555	
About Me B <i>i</i> <u>U</u> À, 다고 드 (~ ~	::	
Testing Address Information		
Address		



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).

Key Takeaways





Resources

- Nov 7 Webinar <u>Building a Rich People Search with OOTB and Open-Source Components</u> <u>Extranet User Manager</u>
- <u>Resources | Extranet User Manager</u>
- MBNCanada Resources | Extranet User Manager
- <u>Power BI Azure AD Users and Groups Dashboard Technical Guide | Extranet User Manager</u>
- 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

PLEASE RATE THIS SESSION IN THE MOBILE APP.

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