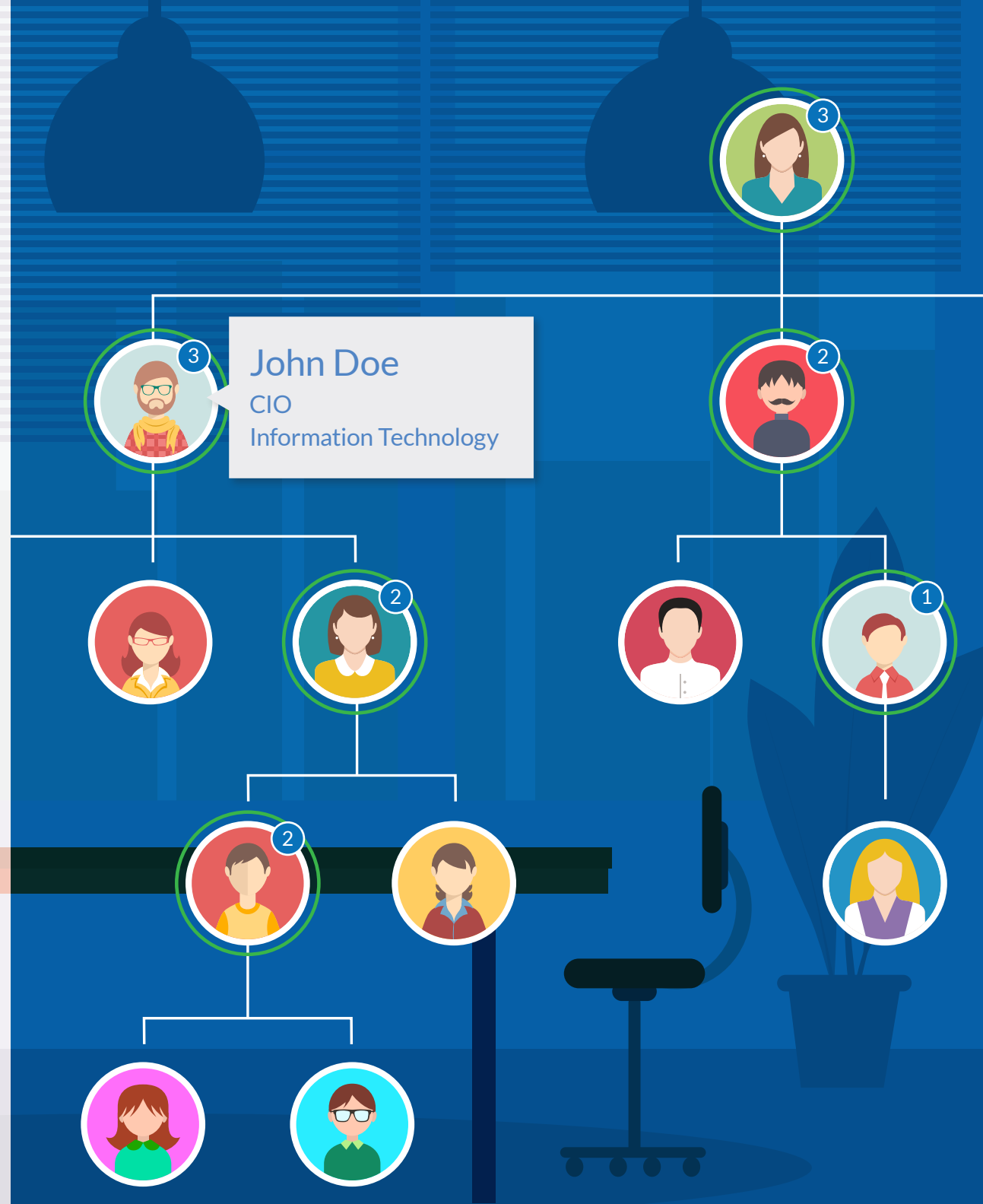


The Guide to Organizational Charts in Office 365



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Introduction to organizational charts

The internal structure of an organization is as vital as the external structure of its walls. Understanding the structure of your organization is essential for understanding hierarchies, who to report to in specific situations and who has responsibility for various projects or pieces of work. Organizational charts are hierarchical diagrams that can provide reference points for managerial authority, as well as anchor points for fundamental human resource (HR) and administrative practices. An organizational chart (or org

chart) should stretch across the business in its entirety. It is fitting, then, that the number of people that can benefit from org charts is equally as broad.

Org charts are primarily designed to show the roles and relationships of employees at a glance. But the information used for this can also offer a better understanding of how the organization is designed and where each individual, department, and business unit fits into the 'big picture'.

Why do we need organizational charts?

Without the structure that organizational charts provide, it is more difficult for businesses to define internal processes and streamline communications as work moves throughout the business. Linked to the efficiency by which workers can connect with one another and the information they hold, organizational charts can be directly attributed to a business' productivity—specifically for administrators, whose job it is to collect employee profile information.

As the hub for an organization's employees, information and work tools, org charts are a perfect fit for Office 365. Currently the most popular enterprise productivity platform on the market¹, Office 365 is a prime source for extracting the information that goes into org charts. There are various methods of doing so: from extrapolating information contained in Excel spreadsheets or PowerPoint presentations to using artificial intelligence-driven and even automated solutions.

In Office 365, there are several methods for viewing and creating a organizational chart:

- **Office 365 Contact Cards**—in Outlook, SharePoint, OneDrive, Skype for Business and Microsoft Teams, selecting the “Organization” tab on an employee’s Contact Card will display their place in the organization (providing that information has been added to Active Directory).
- **Delve**—has a very simple, linear organizational chart that comes out of the box.

- **PowerApps**—PowerApps has a template app for employee search on mobile devices.
- **Microsoft Office Suite (Microsoft Visio, Word and PowerPoint)**—a Microsoft product suite that as part of its vast feature set allows you to create flexible organizational charts manually using chart templates and or shapes.

Given the breadth of Microsoft applications, administrators can take their pick depending on the needs of their company. However, with so many options, you will need to be aware of the limitations in all of them.

This whitepaper will explore the different ways Office 365 administrators can create and manage organizational charts in Office 365 to help businesses and employees get the most from them.

This is your comprehensive guide to organizational charts in Office 365.

¹ McAfee. 2016. Office 365 Adoption Rate, Stats, and Usage. Online source: <https://www.skyhighnetworks.com/cloud-security-blog/7-charts-reveal-the-meteoric-rise-of-office-365/>



Marc Anderson

Microsoft MVP for Office Apps & Services
Co-Founder and President
of Sympraxis Consulting

“Collaboration and innovation happen because people work together in productive and effective ways to reach more valuable results. Any technology we use to foster those processes must-by its very nature—bring people together in the first place. To work effectively with others in our organizations, we need to know a bit about them: where they sit in the organization, who they work for, what their skills are, even what they look like. Every organization we work with needs some sort of organizational chart and employee directory for this to work.”

The value of organizational charts

The key selling point of Office 365 is its ability to provide an individual with everything they need to get work done—the people, applications, and information they interact with each day. With this information readily available, any business in Office 365 should make use of organizational charts. Key benefits include:

- **Streamlined collaboration:** help workers find relevant colleagues quickly and easily when they need to.
- **Information access:** reduce the likelihood of accidentally sharing information with someone who doesn't have permission to view them.
- **Free up time:** with automation, reduce the manual administrative work required to keep organizational charts updated as companies grow.

The final benefit in the list above is crucial for Office 365 administrators. Based in the cloud, Office 365 is a platform

that is constantly updating and evolving. This is a selling point for many cloud-based platforms. However, updating employee information so organizational charts are always up-to-date ultimately rests on the shoulders of the platform administrator. User information that is vital for org charts—for example, employee names, roles, contact details, reporting lines etc.—must be manually updated for accuracy. It is the platform administrator's job to make sure employees do this, which is easier said than done.

Microsoft provides Office 365 administrators with a wealth of employee information through Azure Active Directory and the Office Graph. But they need to know how to capture and manage that data if they want to take advantage of it.

Organizational charts for admins

Up to date profile information is integral to an engaging user experience. Org charts should empower employees to take control of their profile data, essentially crowdsourcing the upkeep of profile information. This removes the burden from Office 365 administrators, without neglecting the focus on control, privacy, and information governance.



Vadim Tabakman

Manager Technical Evangelism
Americas at Nintex

“Digital Transformation is resulting in businesses wanting to automate as much as possible, and reduce paper based processes. Almost all of these processes require human interaction. In order to achieve this, it’s necessary to build workflows that can easily find the people required to respond to tasks. Having workflows being able to traverse up and down a complete and constantly updated Organization Chart, means your workflow doesn’t have to change when people move positions.”

The challenges of organizational charts

Organizations that choose not to use org charts face explicit and implicit problems. An employee asking who should approve a contract is an obvious problem. But issues like poor communication or even conflict between departments and employees can go under the radar, only becoming apparent when something goes seriously wrong.

There are also explicit and implicit problems for administrators working with organizational charts, specifically around creating, deploying and maintaining them. Platform administrators need to be aware of these challenges so they can look to resolve them.

- **Underdeveloped org charts:** If the information is no more than an employee's name and job role, organizational charts are going to perform the most basic of functions. Administrators that may have already implemented an org chart should look to add information to provide more value to employees.
- **Administrative burden:** Traditionally, any profile information that needs to be added, removed, or changed would create manual work for an administrator. This process is of course time consuming and tedious, making it more susceptible to human error.
- **Lack of time:** Office 365 administrators are busy enough without chasing employees to update their profile information. The prospect of contacting employees, waiting for their response, and updating profiles with new information is not a particularly appealing task. But it is one that needs to be done routinely.
- **Inconsistent and/or inaccurate employee data:** Like any task that is overly or unnecessarily difficult to complete, it's likely that attention-to-detail slips and complacency creeps in. In a worst-case scenario, the task is ignored altogether. As a result, employee information will become inconsistent and inaccurate over time. This can snowball, creating more work to fix the problem meaning administrators are less keen—and therefore less likely—to do so.

Depending on the solution you use to create organizational charts; these challenges are more or less frequent, and harder or easier to resolve. The following section details the different methods available to Office 365 administrators for creating organizational charts in Office 365.



Loryan Strant

Microsoft MVP for Office 365
Founder of Strant Consulting

“Despite living in an ever-connected social world in our personal and business lives, employees within organisations often struggle to find and connect with others due to stale, manual, or just non-existent organisational charts.”

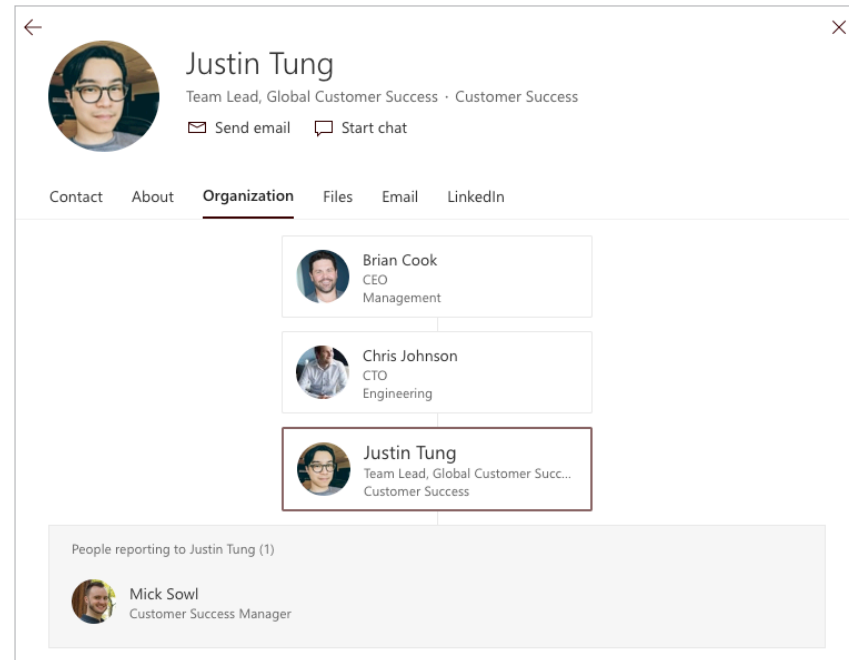
What to expect out-of-the-box in O365

There are several ways you can use organizational charts in Office 365:

Office 365 Contact Cards

In Outlook, SharePoint, OneDrive and Microsoft Teams, clicking on an employee's name will show their Contact Card. The Contact Card includes details about the individual, including contact information, a bio, and email.

Selecting the "Organization" shows a pre-formatted organizational chart. This is restricted to showing a maximum of four hierarchical levels per employee. As you click on other people, the organization view refreshes to the context of that person. This makes for speedy discovery up and down the "food chain" but prevents you from seeing a larger organizational structure.



Delve

Delve can be launched from the Office 365 App Launcher and is more document centric than people centric.

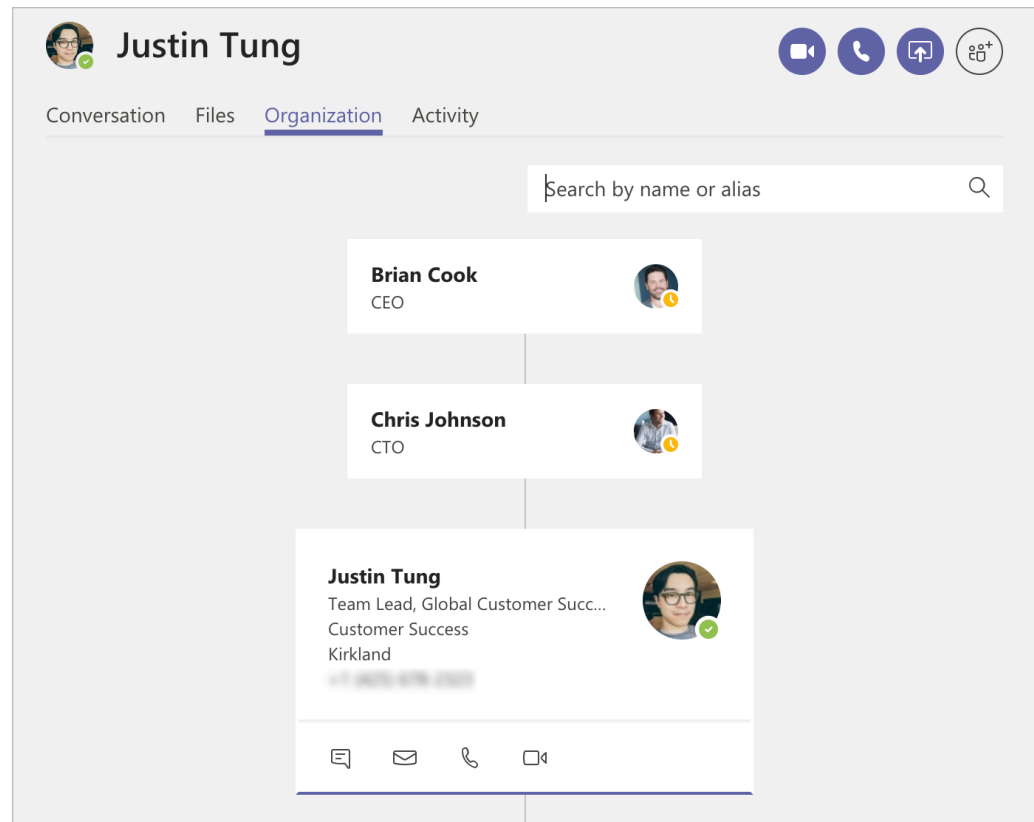
Any person you click on within Delve takes you to their Delve profile page. This has a very simple linear organization chart, that shows the management chain but not peers. In order to show the Org chart in Delve, you need to assign the Manager for users in Azure AD or SharePoint online user profiles directly.

The screenshot shows a Delve profile page for Justin Tung. At the top is a circular profile picture. Below it, the name "Justin Tung" is displayed, followed by his title "Team Lead, Global Customer Success" and location "Kirkland". There are four contact options: email (j.tung@hyperfish.com), another email (j.tung@hyperfish.com), a phone number (+1 425 428 2282), and a link to "OneDrive files shared with me". A "Today" calendar bar shows activity from 12p to 9p. Below the calendar are two skill/education sections: "SharePoint, IIS, Microsoft SQL Server, PowerShell, Active Directory Administration" with a "View skills" link, and "Washington State University, Pierce College" with a "View schools and education" link. A "View Profile" button is at the bottom of the profile section. The "Organization" section below shows a linear hierarchy: Brian Cook (CEO) is the manager of Chris Johnson (CTO), who is the manager of Justin Tung (Team Lead, Global Customer Succ...). Justin Tung has one direct report, Mick Sowl (Customer Success Manager).

Microsoft Teams

Using Office 365 contact Cards, the “Organization” tab shows the linear hierarchy of the person the chart is centered around. This tab can be turned off by administrators using ‘Group Policy’.

Microsoft Teams allows bots to be installed from the store (Which can also be restricted by administrators). Microsoft have created a bot “WhoBot”. This bot allows employees to search for people in your organization by name or by topic² within the Team chat experience.



² Microsoft. 2018. New ways to use apps and get more done in Microsoft Teams. Online source: <https://blogs.office.com/en-us/2018/01/29/new-ways-to-use-apps-and-get-more-done-in-microsoft-teams/>



Stephanie Donahue

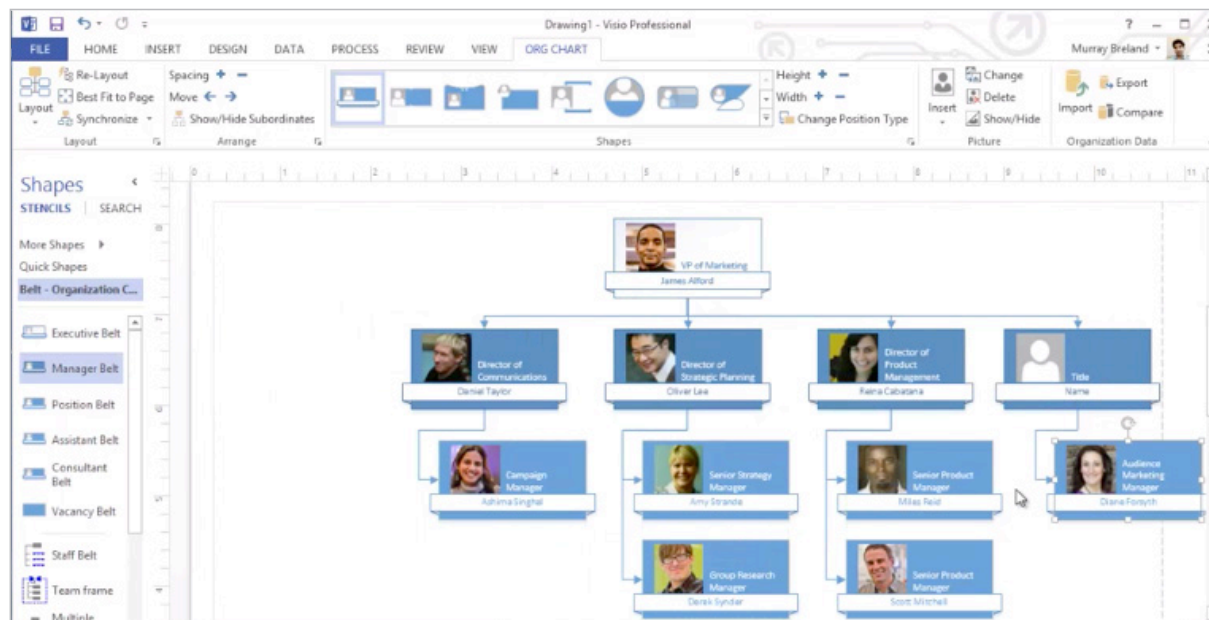
Microsoft MVP for Office Apps & Services
President & Co-founder of PAIT Group

“Organizational chart functionality is always one of the first topics to surface when planning an intranet. Initially, there is excitement when we talk about the Who bot and the Organization View tab in Teams, but most customers still feel they are left short with only a partial view of the organization, as it relates to a single employee.”

Microsoft Office Suite—Visio Professional (2016/2019)

Visio is software for creating diagrams and flowcharts, making it the only dedicated Microsoft solution for organizational charts. You can create simple org charts, or integrate data from Excel spreadsheets, databases, or Exchange directory to make more complex diagrams.³

Visio is certainly the more capable solution for creating organizational charts. However, it does not come as part of your Office 365 subscription and must be purchased separately. Visio also lacks some of the more sophisticated org chart capabilities such as automation.



³Microsoft. 2018—Build an org chart in Visio. Online source: <https://support.office.com/en-us/article/build-an-org-chart-in-visio-24edb0c1-49c7-409f-8be2-263a44b0c797>

Microsoft Office Suite—Word and PowerPoint

Making organizational charts in Microsoft Word and Microsoft PowerPoint requires the user to use a library of shapes and connectors to build out the structure of the

chart and to manually add the profile information. Whilst not optimal in many ways, it is a common way for org charts to be created.



Dedicated org chart solutions

Office 365 administrators are not short on choices when it comes to creating org charts. However, the variety of available applications is also a negative. The apps Microsoft provide are not specifically designed to create org charts, and so are missing some of the features and functionality that can make the process easier for administrators. And the one application that does is not included in your Office 365 subscription.

Dedicated software for organizational charts can use artificial intelligence, automation, and bot technology to make collecting and managing profile information far easier for administrators. By investing a little more into the software behind org charts, you can get far more value while doing less work.

Dedicated org charts solutions provide:

- **Consistency:** let employees fill in information via pre-populated drop-down menus to standardize data entry.
 - **Governance:** ensure consistency and compliance as your organization grows with ongoing monitoring and approval tasks.
 - **Integration:** ensure that information is consistent across all Office 365 applications, and other line of business systems.
 - **Customizable:** can be configured to show different parts of your organization.
 - **Specificity:** configure which departments approve which information in an employee profile. For example: office managers for employee information, HR for job titles
- **Visibility:** use a centralized source for finding out information on colleagues old and new, their role, where they work, their interests, etc.



Julie Turner

Microsoft MVP—Office Apps & Services
Partner at Sympraxis Consulting

“Anything you can do to nurture and develop your internal community can only benefit your organization’s overall health. Therefore, the org chart, which gives employees the ability to get accurate information on their coworkers with a visual way for people to identify each other, is a cornerstone to enabling a harmonious and high-performing community.”

Org charts with Hyperfish

Features aside, organizational charts are ultimately only as good as the data you feed them with. Each of the solutions require employee names, job titles, department names, and contact information for the discovery of employees to work. Without this, you will not be able to discover people.

The best solutions for org charts include the technology to help you capture and maintain employee information in Office 365. Hyperfish monitors your directory to identify information that is missing or invalid, notifying users via email or IM chat of the disparity. This is done automatically, meaning the only action an employee needs to take is answering a simple question. And they are informed of this on whichever device they are working on—desktop, web, or mobile.

This frees up considerable time for Office 365 administrators. Hyperfish can also set reminders so if users don't update information the first time they are asked, the onus isn't on you to chase them.

Hyperfish uses artificial intelligence to reduce the org chart process into five simple steps:

1. **Capture:** Automate the collection of employee information. Hyperfish identifies what information is present and correct, and likewise what is missing and incorrect, by monitoring an organization's directory.
2. **Validate:** Establish ongoing accuracy of information. Hyperfish uses profile validation to ensure that employee information is consistently accurate. Users are informed when their profile information needs to be updated by email or IM chat, and they are directed to the right place to quickly update their information.
3. **Onboard:** Hyperfish makes sure all new employees are immediately included and their information is automatically added to the organizational chart.
4. **Update:** Organizations have the ability to block images that don't meet the requirements—profile pictures that are too dark, obstruct the face, include multiple people, etc.—and also images that are inappropriate or not safe for work.
5. **Access:** Make your org chart easy to access and open to all. The best way to do this is to include it as a feature on your organization's intranet. This way all of your employees can access it whenever they log in.

Hyperfish has a range of other features to make organizational charts easier to create and manage. Features include:

- **Hyperbot** communicates with users through email or Skype for Business and Microsoft Teams to notify them when their profile information needs updating. Administrators can choose the personality of Hyperbot to determine the tone of interactions with users, and how frequently it contacts them to collect or confirm information.
- Organizations often have profile information stored in other systems of record and want this information across all their Office experiences. **Scheduled Import** pulls profile information from systems via a file export and imports it into other integrated profile information systems.

- **Reporting** provides insight into how populated employee profile information is across the organization, shown in visual, comprehensible graphs.
- **Directory Scoping** allows you to choose which users across the organization will be included in the analysis and collection of profile information.
- As well as Office 365 environments, Hyperfish supports hybrid instances of Active Directory and SharePoint user profiles.

Office 365 administrators have a wealth of options for organizational charts. But Hyperfish is the only comprehensive solution that provides everything you need to manage profile information for a fraction of the time it would usually take.

Get started today with a free trial of Hyperfish and start collecting and managing information to create and maintain organizational charts in Office 365.



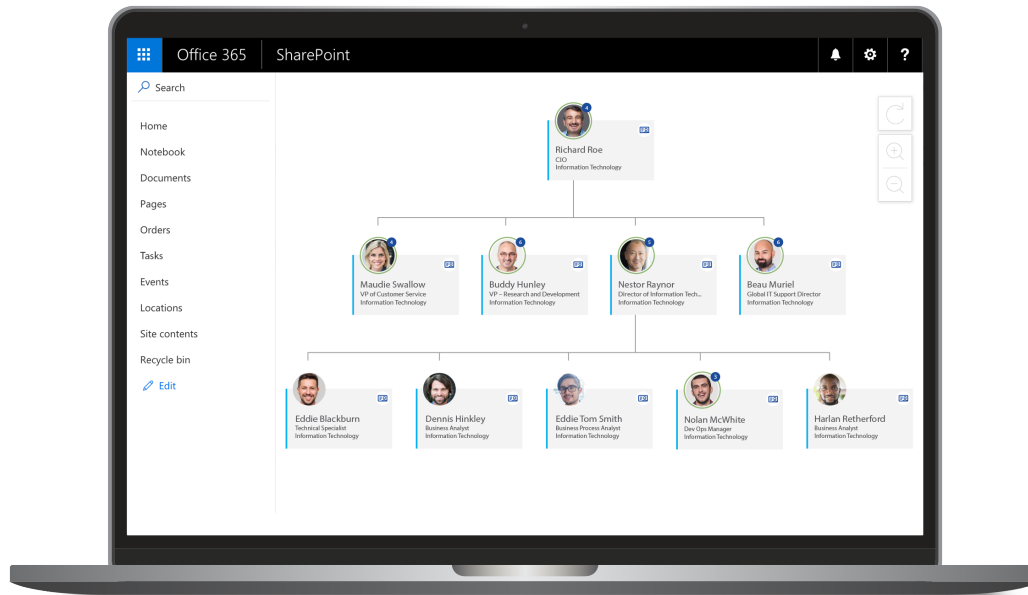
Mark Rackley

Microsoft MVP for Office 365

Chief Strategy Officer & Partner of PAIT Group

“Org charts are at the top of every intranet’s ‘needs’ and ‘must haves’ but most solutions out there are maintained in separate databases, quickly out of date, or simply don’t perform well. Having an org chart governed by Azure AD is just a no-brainer and presents quick wins with a lot of value for most organizations... assuming you keep your AD clean with Hyperfish.”

About Hyperfish



Hyperfish helps bring your company and employee directory to life by ensuring directory and profile information is always complete and up-to-date. Hyperfish improves IT Service Delivery, increases employee engagement, and helps unlock the value of your technology investments.

Hyperfish uses AI and Bot technology to automate the collection of profile information. The secure service supports on-premises, hybrid, and online environments.

You can experience Hyperfish for free with Hyperfish Lite to automatically collect and manage profile photos in Office 365.

www.hyperfish.com/try



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