KNOWLEDGE BASE ARTICLE

How to Add the Organizational Chart to Microsoft Teams

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Introduction

Many employees spend most of their day in **Microsoft Teams** rather than on the intranet. The Vitextra Organizational Chart ships as a Teams application, so the company structure can live where people already are: as a **personal app** pinned to the Teams sidebar, or as a **tab** in a team's channel that shows that team's own branch of the organization. The data, the layouts and the navigation are exactly the same as on a **SharePoint** page.

This article covers the three steps involved: making the app available to Teams, adding it as a personal app or a channel tab, and saving default settings for the personal app. It assumes that the Organizational Chart package has already been deployed to your **SharePoint App Catalog** and that the **Microsoft Graph** permissions have been approved.

Tip

If the product is not installed yet, start with KB10035. How to Install a Vitextra Product in SharePoint Online and KB10235. Microsoft Graph Permissions Required by Organizational Chart, then come back here.

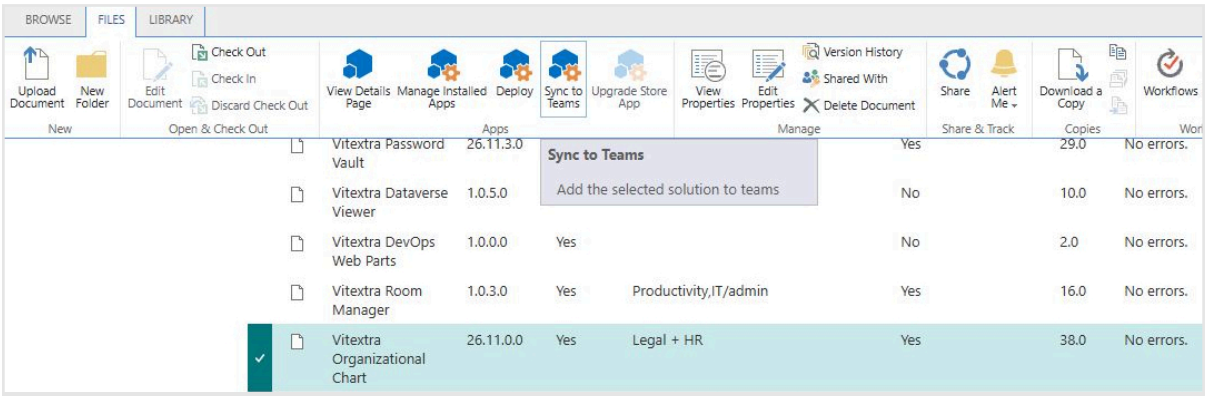
Prerequisites

- To sync the app to Teams you need to manage the SharePoint App Catalog - typically the **SharePoint Administrator** role.
- To add an already-synced app as a personal app, no special permissions are needed: any user can do it from the **Teams app** store, as long as your Teams administrator allows custom apps built for your organization.
- To add the app as a channel tab you need to be a member of the team (and team owners may restrict who can add tabs).

Making the app available in Teams

1 Open the Microsoft 365 admin center and go to **SharePoint** under **Admin centers**.
2 In the **SharePoint admin center**, select **More features**, then click **Open** under **Apps** and go to the **App Catalog** → **Apps for SharePoint**.
3 Select the **Organizational Chart** package in the **list**, open the **FILES** tab of the ribbon and click **Sync to Teams**.

A notification *Successfully synced teams solution* confirms that the Teams app package has been published to your organization's app store. The Teams app is linked to the SharePoint package, so updates installed in the App Catalog apply to Teams as well.



Publishing the app to Teams

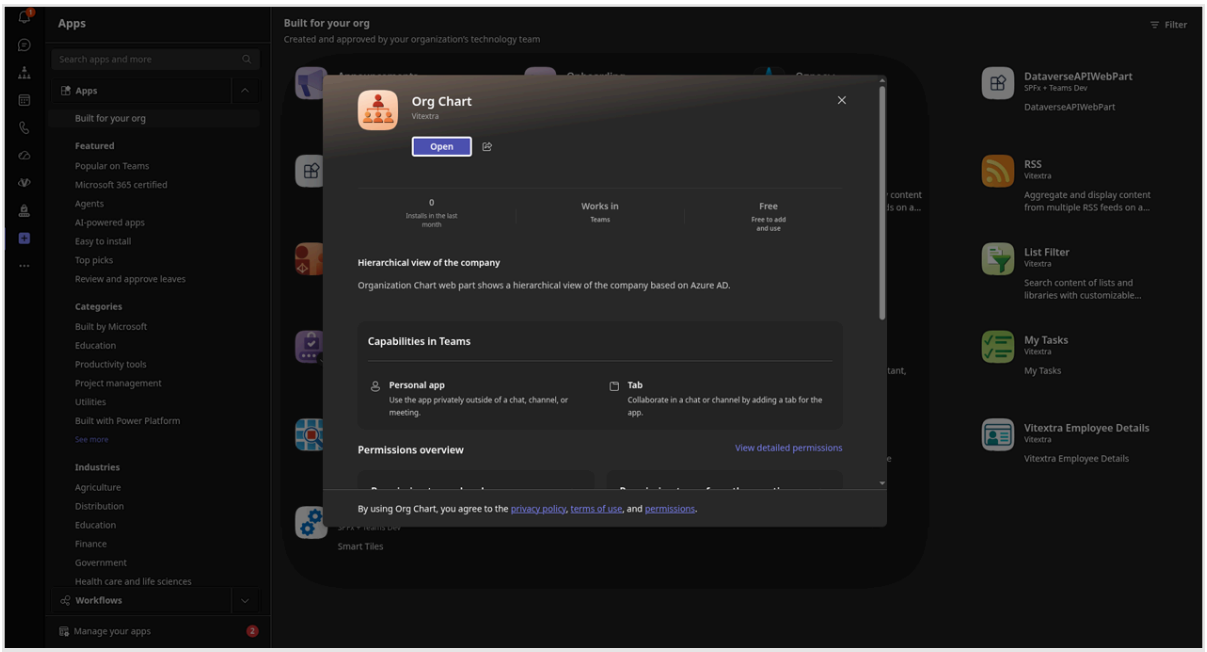
Note

Alternatively, a Teams administrator can upload the Teams app package manually in the Teams admin center under **Teams apps** → **Manage apps** → **Upload new app**. The package is the `TeamsSPFxApp.zip` file included with the product. The **Sync to Teams** button is the simpler route and is recommended.

Adding the chart as a personal app

1 In Microsoft Teams, click **Apps** in the left sidebar.
2 Select **Built for your org** in the category list - this is where apps synced from your own App Catalog appear.
3 Find the **Org Chart** tile published by Vitextra and click it.
4 On the details page, click **Add** (not *Add to a team*).

The app appears in the left sidebar. Open it and the chart of the entire company is shown immediately, with the search box, the toolbar and all navigation features described in KB10234. Organizational Chart: A Quick Guide for End Users.



The app in the Teams app store

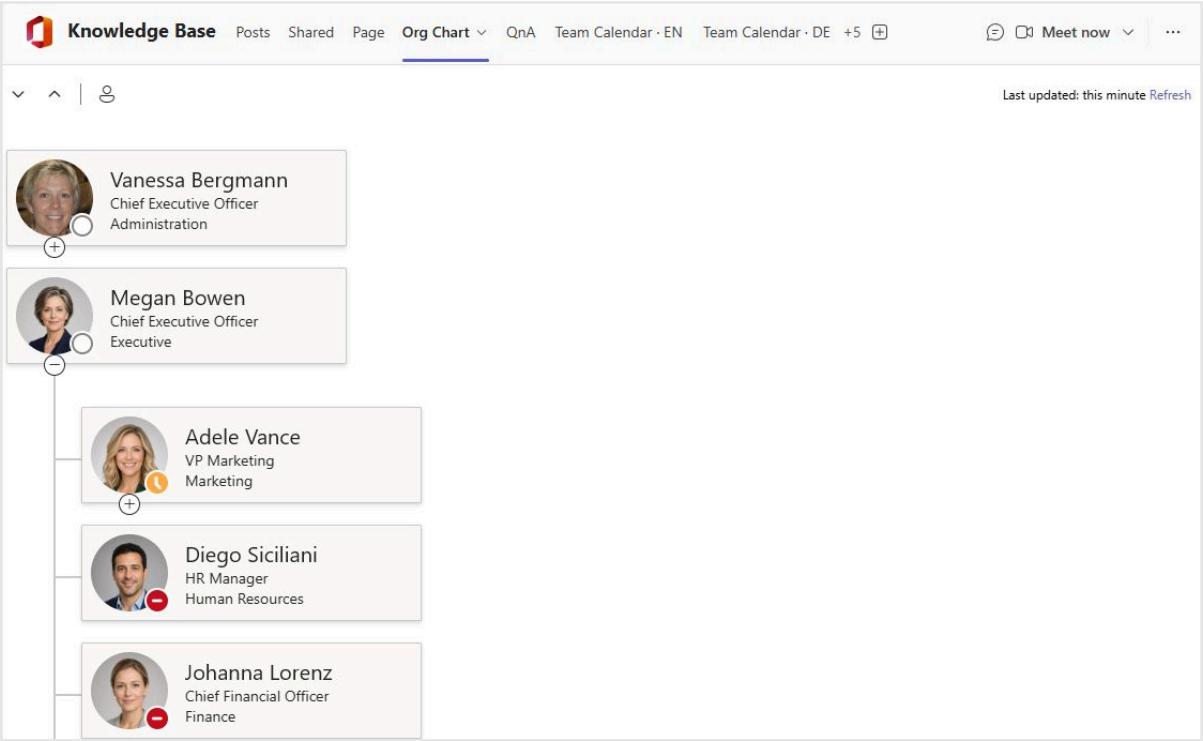
Tip

Adding the app this way pins it only for the person who clicked **Add**. To make the chart appear in the sidebar for everyone, a Teams administrator can pin it tenant-wide with an **app setup policy** in the Teams admin center.

Adding the chart as a channel tab

1 Open the team and the channel where the chart should live and click **+** in the tab bar at the top.
2 Find **Org Chart** in the list of apps (use the search box if needed) and select it.
3 Click **Add** (or **Save**) in the dialog. The tab opens together with the **web part**'s property pane.
4 Configure the chart for this team - typically **Chart Mode** → **Employees reporting to specific user** with the team lead selected as the **Person**, so that the tab shows the team's own branch - and close the property pane.

The tab keeps its own settings, independent of the personal app and of other channels. A team owner can change them later with **Settings** in the tab's menu.



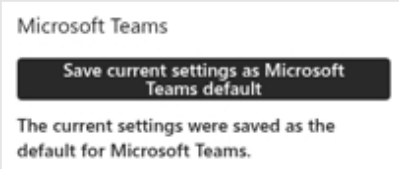
The web part in a Teams channel tab

Saving default settings for the personal app

A personal app has no page to store settings on, so every user would see the chart with the factory defaults: the entire company, the vertical layout, three levels and the standard card fields. To give everyone a consistently configured chart, Organizational Chart lets you save a **tenant-wide default** for the personal app:

1 Open the web part's property pane inside Teams - for example, from a channel tab you have configured the way the personal app should look.
2 Scroll to the **Microsoft Teams** group, which appears only when the web part runs in Teams.
3 Click **Save current settings as Microsoft Teams default**. The message *The current settings were saved as the default for Microsoft Teams* confirms the operation.

From then on, every user who opens the personal app gets the saved configuration: chart mode and root person, layout, levels, card size and fields, filters and exclusions, and export formats. The saved default does not affect channel tabs or SharePoint pages, each of which keeps its own settings.



Saving the Microsoft Teams default settings

Warning

The default is stored per **tenant** and is shared by all Teams users, so it should be saved by an administrator who owns the chart configuration. Saving it again overwrites the previous default. Users need to reopen the personal app to pick up a new default.

Themes and mobile

The chart follows the Teams theme automatically, including **dark** and **high contrast** modes. In the Teams mobile apps the chart is available too; the **Vertical** layout is the better choice there, as it fits a narrow screen without zooming.

Tip

A complete description of the settings available in the property pane - the same in Teams and on SharePoint pages - is in KB10233. How to Add and Configure the Organizational Chart Web Part.

Learn more about the product: *https://vitextra.com/en/products/org-chart*

Terms

List
A list is a storage unit in SharePoint. A list can contain columns of different types, content types, and views. A document library is a special type of list and therefore inherits the functionality of a list.

Microsoft Graph
Microsoft Graph is a REST API secured with Microsoft Entra ID (formerly Azure Active Directory) and OAuth 2.0. It provides a single endpoint for accessing data and services in Microsoft 365, such as SharePoint, Outlook, OneDrive, Teams, and others.

Microsoft Teams
Microsoft Teams is a chat-based collaboration platform for business communications with features for online meetings, live events, and document sharing.

SharePoint
SharePoint is a web-based collaboration platform that provides content management, document management, workflow applications, search, and other tools that empower employees and teams to work together. SharePoint is also a secure place to store, organize, and access shared information.

SharePoint Admin Center
The SharePoint admin center is the web portal where SharePoint administrators manage sites, sharing and access settings, the App Catalog, storage, and other SharePoint Online settings for the tenant.

SharePoint App Catalog
A special SharePoint site collection that stores SharePoint and Office apps to make them available within the web application where the App Catalog is configured. See also App Catalog.

Teams App
A Teams app is an application that extends Microsoft Teams with capabilities such as tabs, bots, message extensions, and meeting extensions. Teams apps are distributed as app packages through the Teams app store, AppSource, or the organization's catalog.

Terms

Tenant
A Microsoft 365 tenant is a dedicated instance of Microsoft 365 services. The tenant holds the organization's information, such as users and domains (Microsoft Entra ID), configurations, subscriptions, and services. An organization receives a tenant by signing up for Microsoft 365 services.

Web Part
A web part is a primary building block of functionality or content placed on a SharePoint page. Some web parts support customization, such as configuring the web part or changing its appearance.