OUTLOOK ADD-IN FOR EMPLOYEE ONBOARDING & OFFBOARDING (SHAREPOINT ADD-IN)

Enterprise, Plus version

User Guide

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<mark>**Version**</mark>

BEYOND TECHNOLOGIES LLC
INDIANA

Suite 305, 8N 3rd Street,
Lafayette, IN 47901

Website: www.beyondintranet.com

Email: contact@beyondintranet.com

About this Document

Purpose

This guide has been written to help you understand and use the Employee Onboarding add-in. It presents the functional capabilities and operational details of Employee Onboarding and contains the procedures that you should know for performing your business tasks using the add-in.

Intended Audience

This guide is intended for all the users of the add-in on SharePoint who are seeking to capture, share and search key information of the company's various departments or projects on a single platform.

Products Supported

> ➤ SharePoint 2013+
> ➤ SharePoint Online

Version Supported

This user guide is relevant in all manner to explain and elaborate the functionalities which are available on our Free & Enterprise version of the Employee Onboarding add-in.

Contents

Introduction

The Outlook add-in for Employee Onboarding helps track the onboarding and offboarding pipeline at any point of time using the Microsoft Outlook. It is available for Employee Onboarding paid users. Maintain accountability at each level of the onboarding process by capturing the key information and taking action at each stage of onboarding and offboarding.

Benefits

- Track pending, ongoing and closed tasks
- Add remarks to your pending, on-going tasks
- Apply easy filters
- Close completed tasks and stay updated
- Birdseye view of on-going tasks at each level

Add-in Authentication

For Desktop Version

Please follow the steps below to authenticate the Outlook add-in for Employee Onboarding:

1. Open [Site Collection URL]/layouts/15/AppRegNew.aspx
2. Enter the following details in the fields:
   - **Client ID:** fa045703-8130-410a-b490-c3d69967f413
   - **Client Secret:** NqL2FRun2OCeT48Jj26og+UEk6hV/d1E5KqZNdfo3Vo=
   - **Title:** EOB-Outlook
   - **Domain:** eoboutlookstage.azurewebsites.net
   - **RedirectURL:** https://eoboutlookstage.azurewebsites.net/SharePointHelper.asmx

Once user fill all the details and click on create button then he/she will be redirected to the second page where a success message with ok button will be displayed like below:

The app identifier has been successfully created.
Client Id: fa045703-8130-410a-b490-c3d69967f413
Client Secret: NqL2FRun2OCeT48Jj26og+UEk6hV/d1E5KqZNdfo3Vo=
Title: EOB Mytask
App Domain: eoboutlook.azurewebsites.net
Redirect URI: https://eoboutlook.azurewebsites.net/SharePointHelper.asmx

3. Give Access:

    Open URL and give the access

    [SITE URL of HOST WEB]/_layouts/15/appinv.aspx

App Id:

[   ] [Lookup]

Title:

[   ]

App Domain:

[   ]
Example: "www.contoso.com"

Redirect URL:

[   ]
Example: "https://www.contoso.com/default.aspx"

Permission Request XML:

[   ]

4. Enter the Client ID as mentioned in point 2.
5. Click on the lookup button to view all the fields. These fields are automatically filled but the user
    will have to fill these details once again as mentioned above.

6. Add following XML in Permission request xml field.

    <AppPermissionRequests AllowAppOnlyPolicy="true">

    <AppPermissionRequest Scope="http://sharepoint/content/sitecollection"

        Right="Manage" />
    </AppPermissionRequests>

7. Click on Create button

App Id and Title
The app's identity and its title.

App Id: ① →
fa045703-8130-410a-b4   Lookup ← ②

Title:
EOB My Task

App Domain:
eoboutlook.azurewebsites.net
Example: "www.contoso.com"

Redirect URL:
https://eoboutlook.azurewebsites.net/
Example: "https://www.contoso.com/default.aspx"

App's Permission Request XML
The permission required by the app.

Permission Request XML:
<AppPermissionRequests AllowAppOnlyPolicy="true">
<AppPermissionRequest Scope="http://sharepoint/content/sitecollection"
Right="Manage" /> </AppPermissionRequests>   ← ③

④ ↓
Create   Cancel

Create   Cancel

8. Click on trust button

Do you trust EOB My Task?

Let it create or delete document libraries and lists in this site collection.

Let it share its permissions with other users.

Let it access basic information about the users of this site.

EOB My Task

Trust It   Cancel

9. Now add in will be available on your Outlook interface but you will have to login with same tenet credentials or you can configure the mail. Right click on outlook then popup will appear as indicated below:
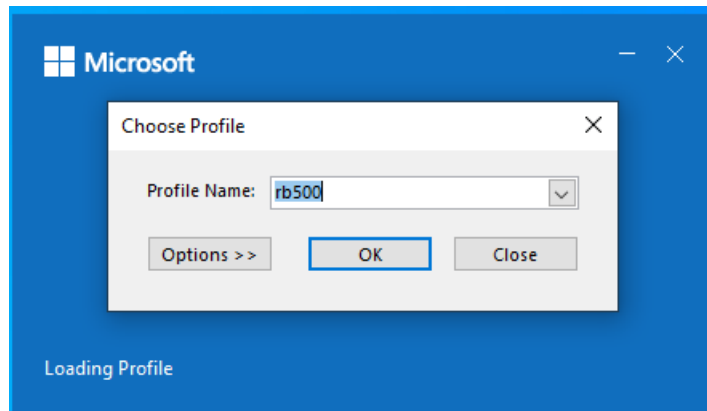
Click on Option button
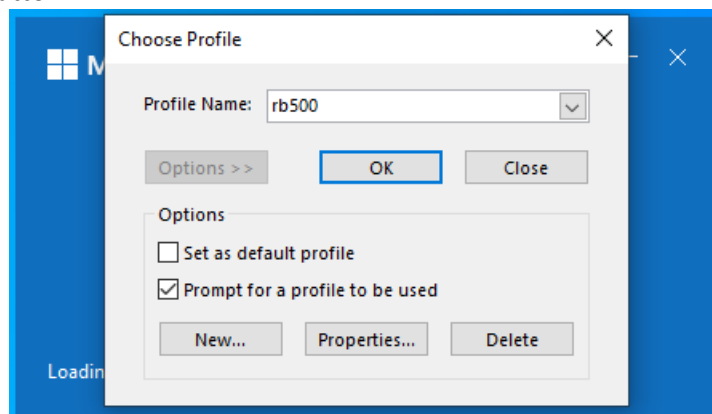
Click on New button and enter your profile name.
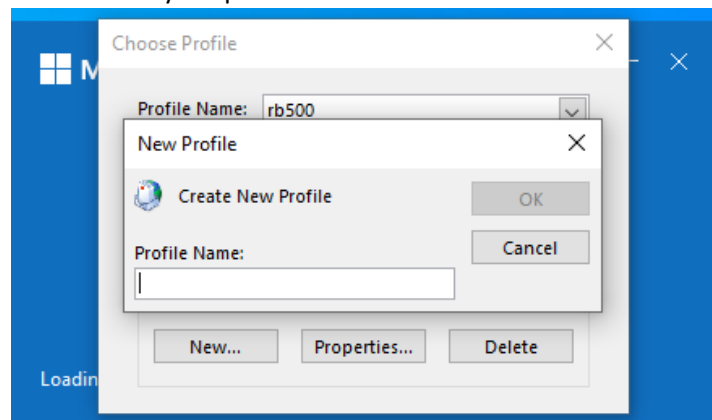
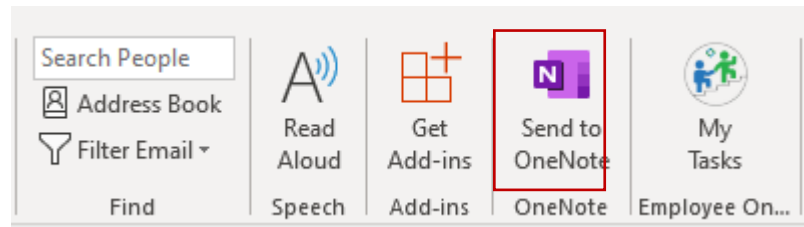Now, click on Ok button and select your mail id and proceed.
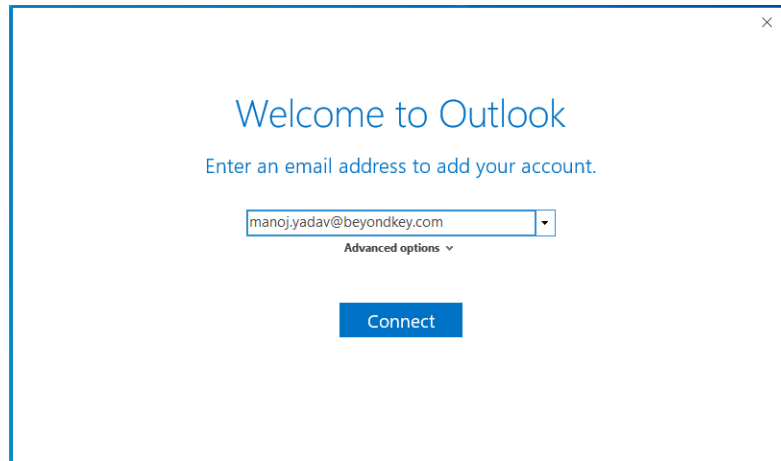
Click on connect button and your configuration is completed. Click on Ok button
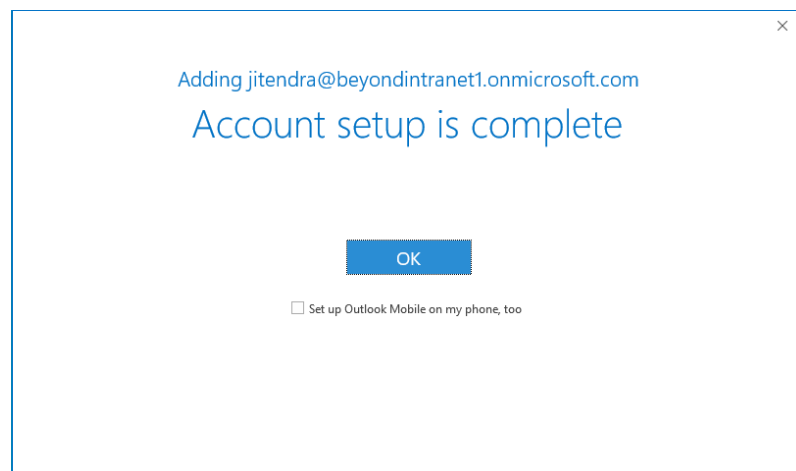
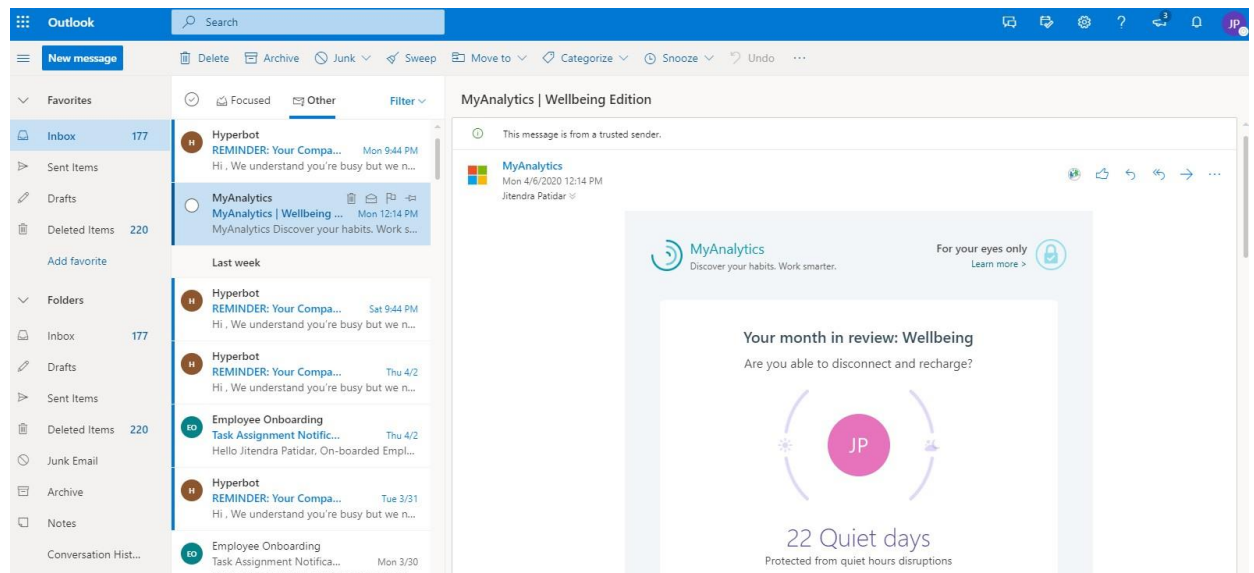Choose your profile name and click ok button.
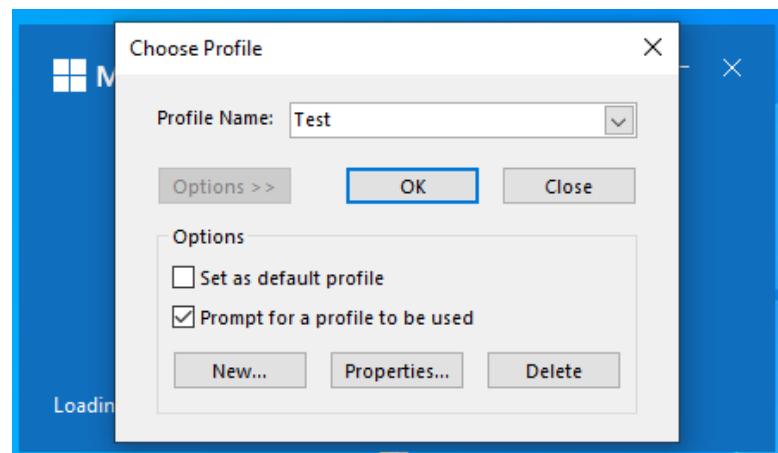
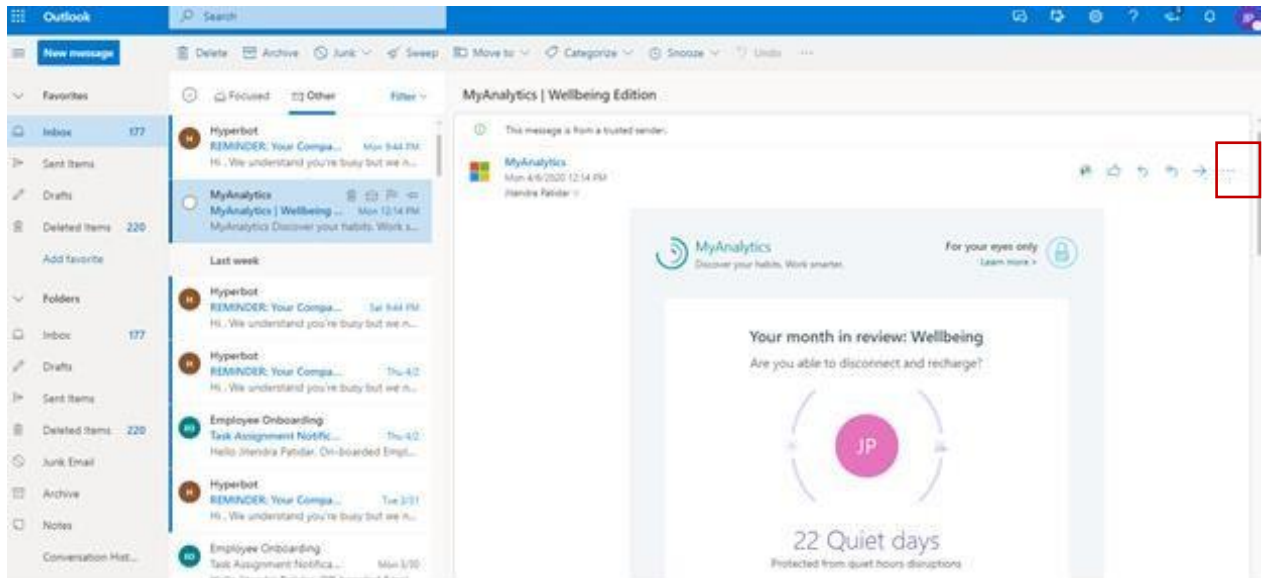Once user click on ok button then mail box will be open and user will be able to access add in like below
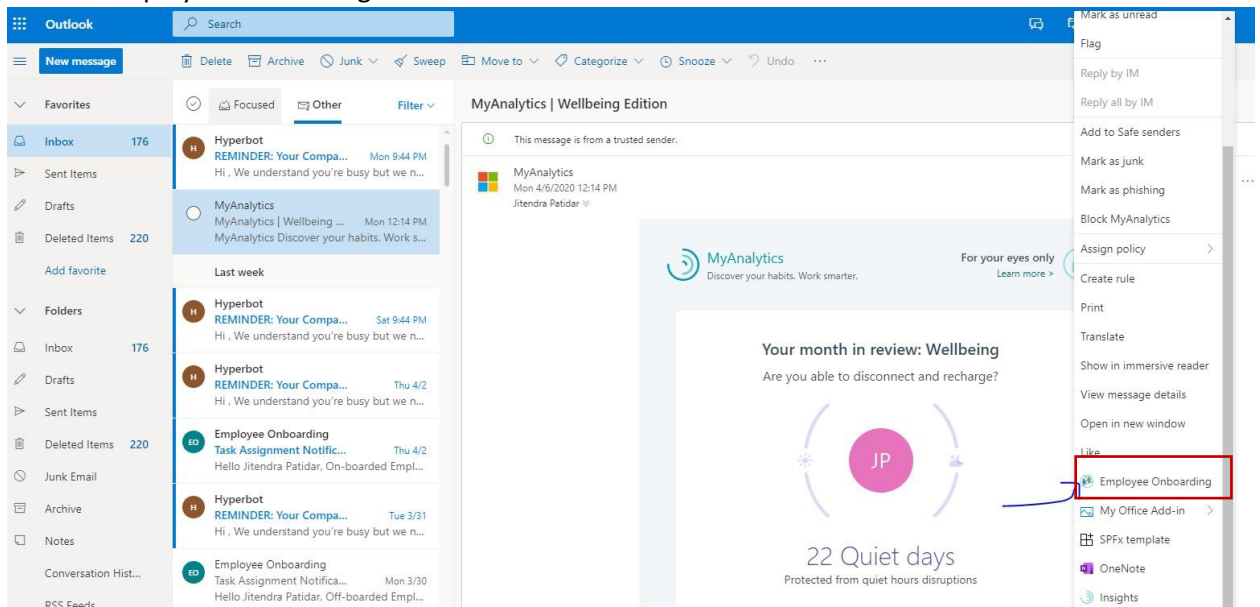
For Outlook web access

Go to browser and enter the url https://outlook.office.com/mail/inbox and login with your credentials, once your login is successful, the mail box will appear as indicated below:

Click on more action option in right corner

Click on Employee Onboarding add in like below

Employee onboarding add in will appear like below:
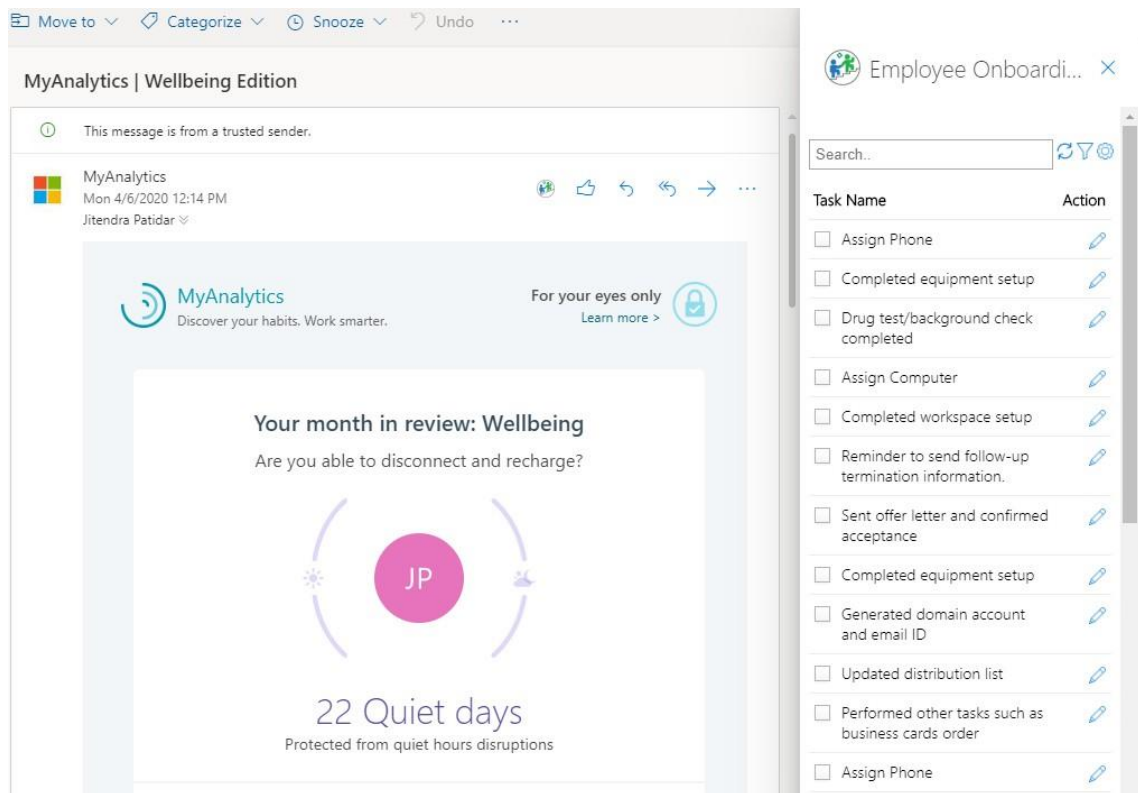
Using the Outlook add-in for Employee Onboarding

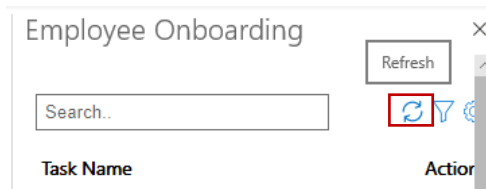### My Tasks

Click on My Tasks to kick-start, as indicated in the image below:
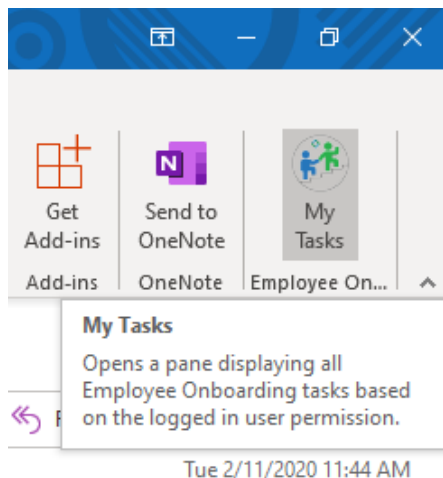
The Employee Onboarding pane will appear on the right, where you can view your tasks as indicated in the image below:
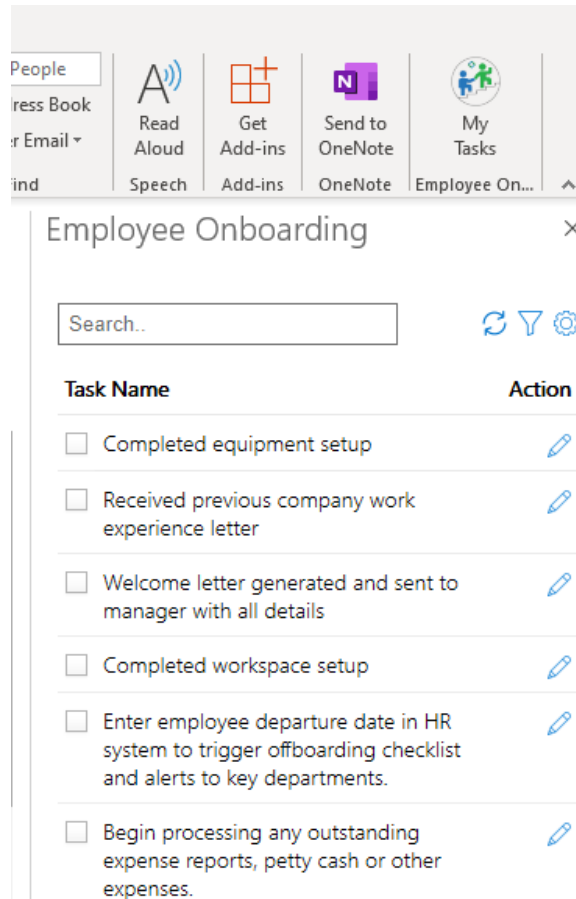
Note: The tasks visible here will depend on the user permissions.
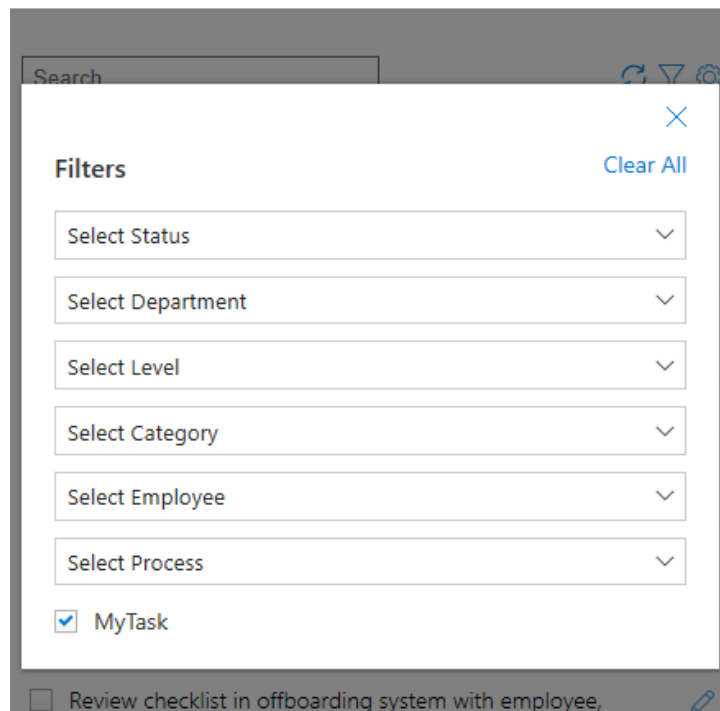
Actions

Refresh Tasks

By refreshing, all the new tasks added will started appearing in the search results, making it easier for you to stay updated.
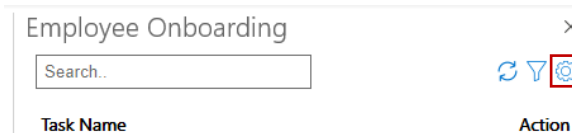
Filters
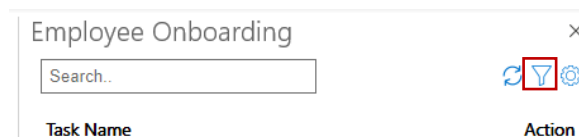
- Upon clicking, you will find a list of filters to apply to choose from, as indicated in the image below:

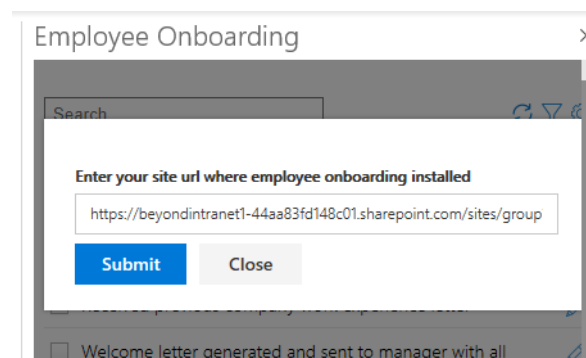- Click on My Task to view your own tasks
- Click on Clear All to remove the filters

Configuration

- Click on the configuration to enter the site URL where add-in has been installed and click Submit, the results will be displayed in the Task Name

Task Action

- Click on the pencil icon to edit the task, as indicated below:

Task Name	Actior
☐ Assign Desk	🖊
☐ Completed equipment setup	🖊

- Upon clicking, you will get an overview of that particular task, refer the image below:

Task Name

Assign Desk

Department

R&D

Category

Network and IT

Employee

Jack Creasy

Assign To

Jitendra Patidar

Status

In Progress ⌄

Remark

Awaiting response from the admin

Update

- Now select the task status and submit your remark

Status

Not Started
In Progress
Close

Test 1

Update

- If you close the task, it will be not be shown under the Task Name anymore

Search Bar

Use the Search Bar to enter a task related keyword as indicated below:

Employee Onboarding   ✕

| departure | ⟳ ▽¹ ⚙ |

Task Name	Action
☐ Enter employee departure date in HR system to trigger offboarding checklist and alerts to key departments.	✎
☐ Enter employee departure date in HR system to trigger offboarding checklist and alerts to key departments.	✎

- You will find the relevant tasks with same keywords
- Click on the check box on the left under Task Name to close the task