

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



Enterprise, Plus version

User Guide

Updated: September, 2020

Version

Notice

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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.

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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/d1E5KqZNdf03Vo=
 - **Title:** EOB-Outlook
 - **Domain:** eoboutlookstage.azurewebsites.net
 - **RedirectURL:** <https://eoboutlookstage.azurewebsites.net/SharePointHelper.aspx>



The screenshot shows the 'App Registration' form in SharePoint. It contains the following fields and values:

- Client Id:** fa045703-8130-410a-b490-c3d69967f413 (with a 'Generate' button next to it)
- Client Secret:** NqL2FRun2OCeT48Jj26og+UEk6hV/d1E5KqZNdf03Vo= (with a 'Generate' button next to it)
- Title:** EOB My tasks
- App Domain:** eoboutlook.azurewebsites.net (with an example: "www.contoso.com")
- Redirect URI:** https://eoboutlook.azurewebsites.net (with an example: "https://www.contoso.com/default.aspx")

At the bottom right, there are 'Create' and 'Cancel' buttons.

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/d1E5KqZNdf03Vo=
Title: EOB Mytask
App Domain: eoboutlook.azurewebsites.net
Redirect URI: https://eoboutlook.azurewebsites.net/SharePointHelper.aspx

3. Give Access:

Open URL and give the access

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

App Id:

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:

Title:

App Domain:
Example: "www.contoso.com"

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

App's Permission Request XML

The permission required by the app.

Permission Request XML:

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.

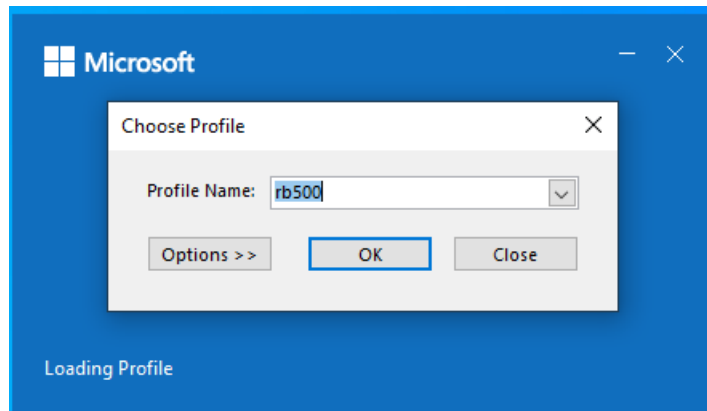
Let it access basic information about the users of this site.



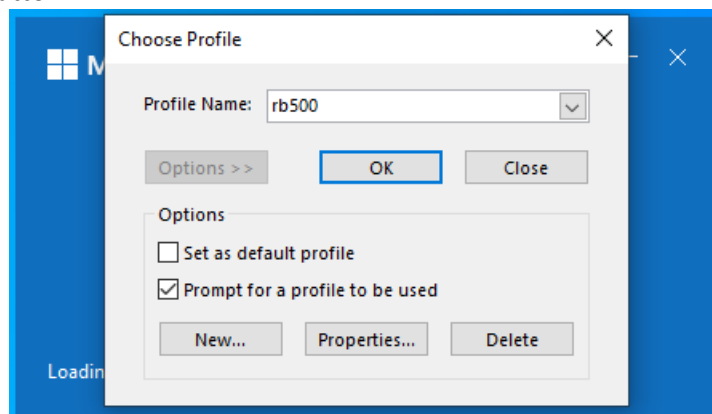
EOB My Task

Trust It Cancel

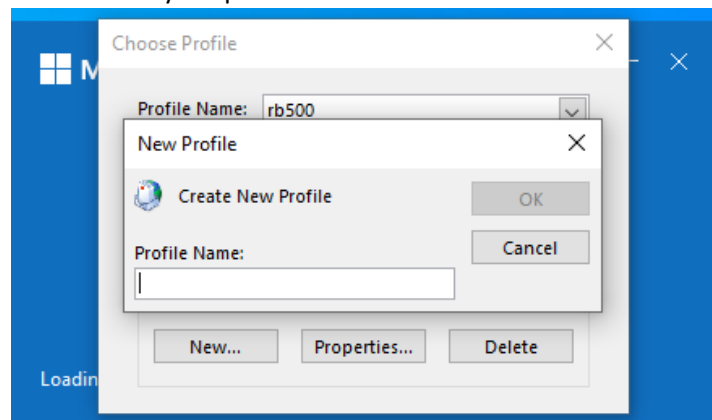
9. Now add in will be available on your Outlook interface but you will have to login with same tenet credentials or you can configure the mail. Right click on outlook then popup will appear as indicated below:



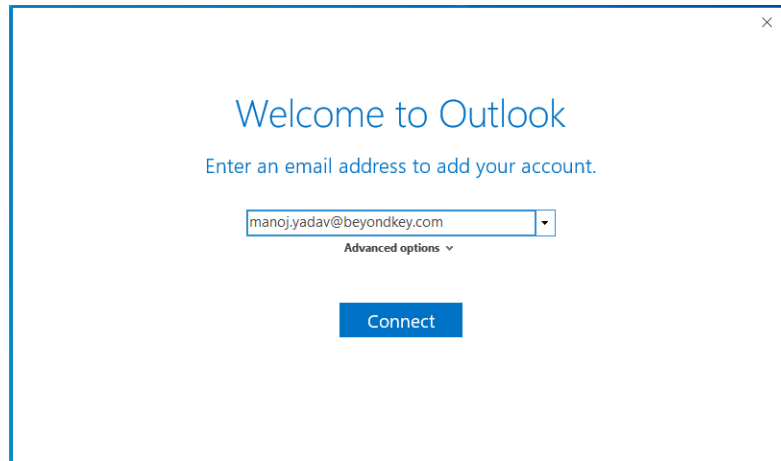
Click on Option button



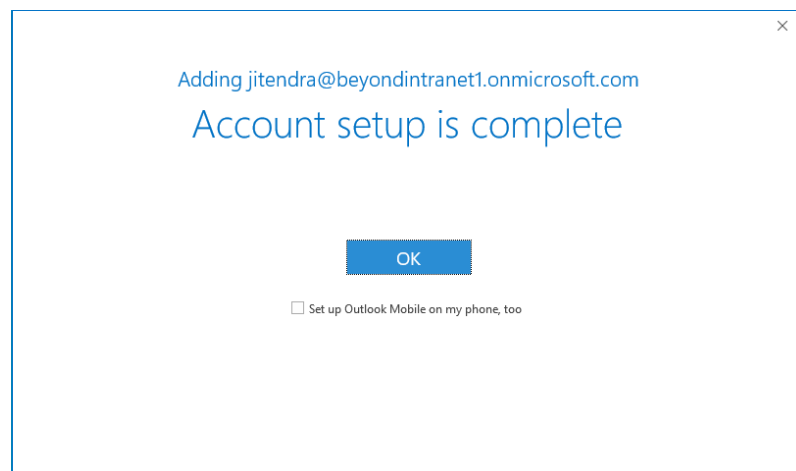
Click on New button and enter your profile name.



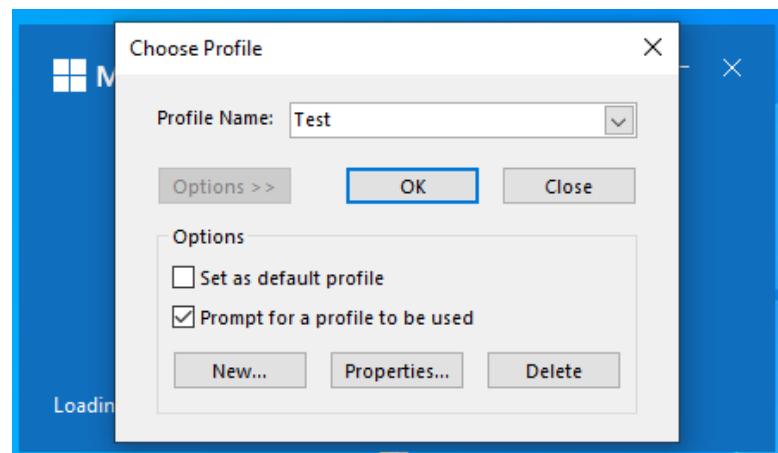
Now, click on Ok button and select your mail id and proceed.



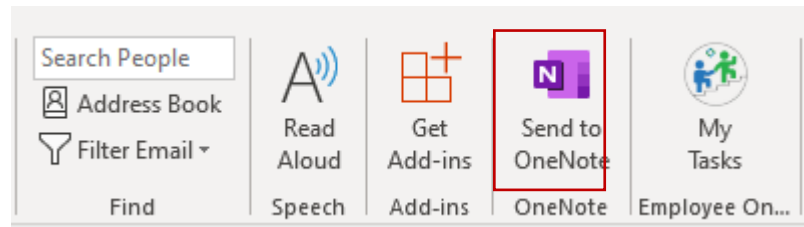
Click on connect button and your configuration is completed. Click on Ok button



Choose your profile name and click ok button.

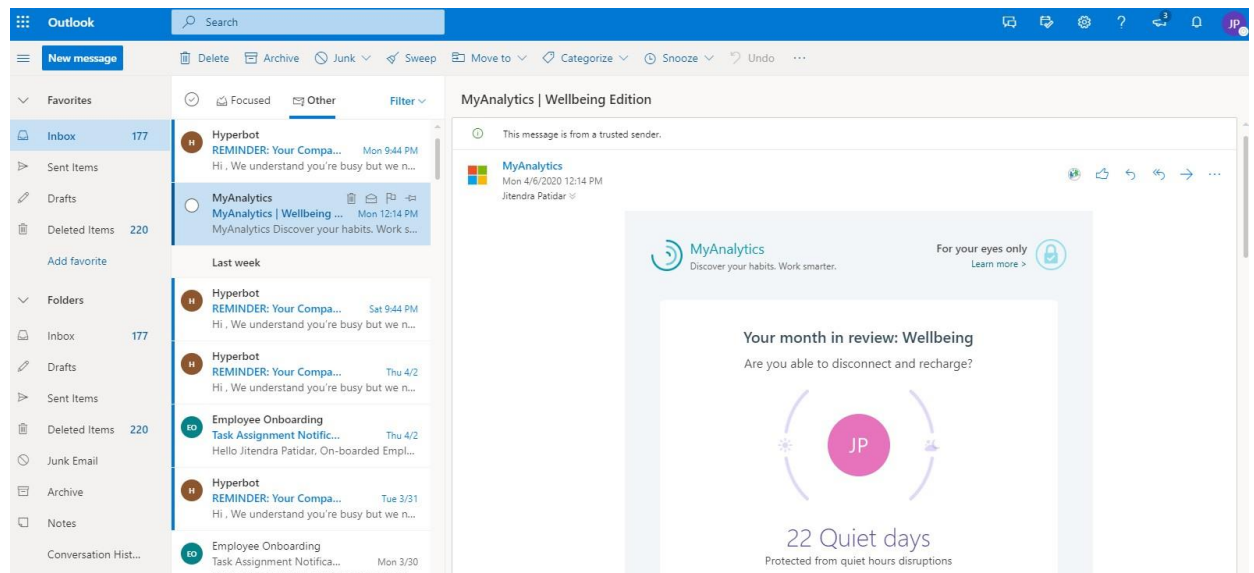


Once user click on ok button then mail box will be open and user will be able to access add in like below

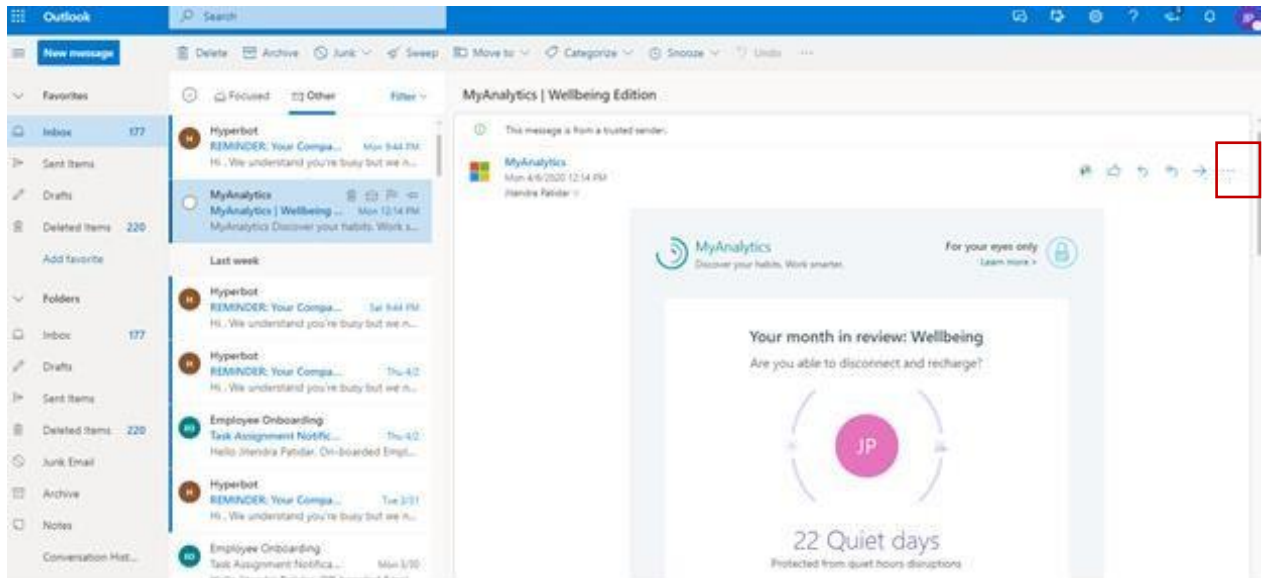


For Outlook web access

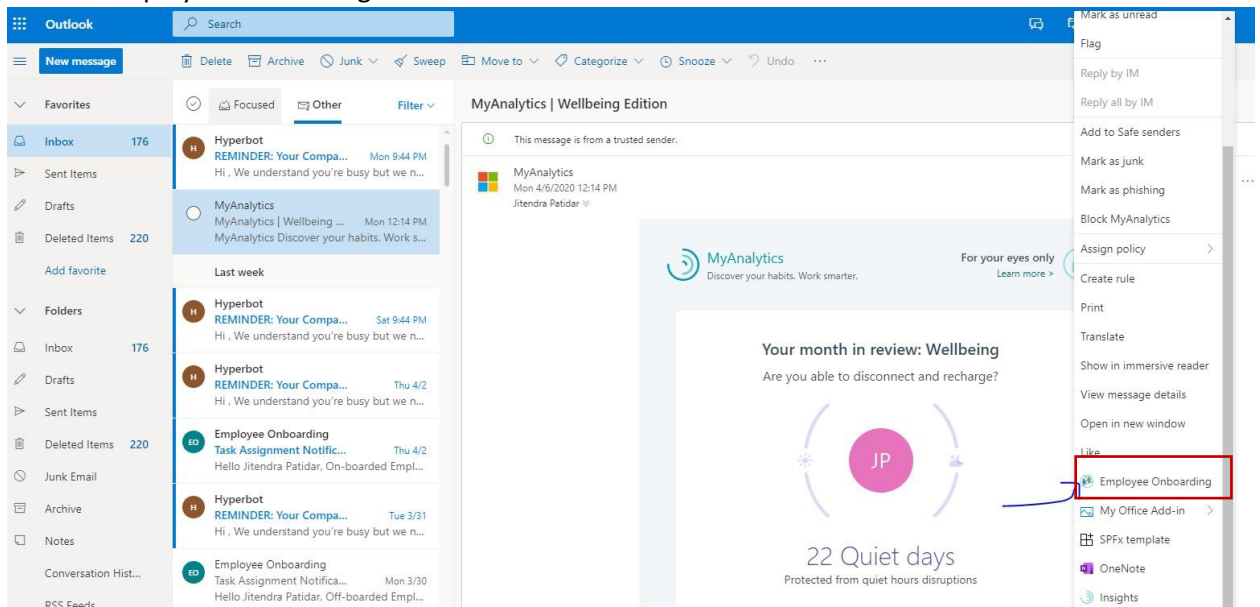
Go to browser and enter the url <https://outlook.office.com/mail/inbox> and login with your credentials, once your login is successful, the mail box will appear as indicated below:



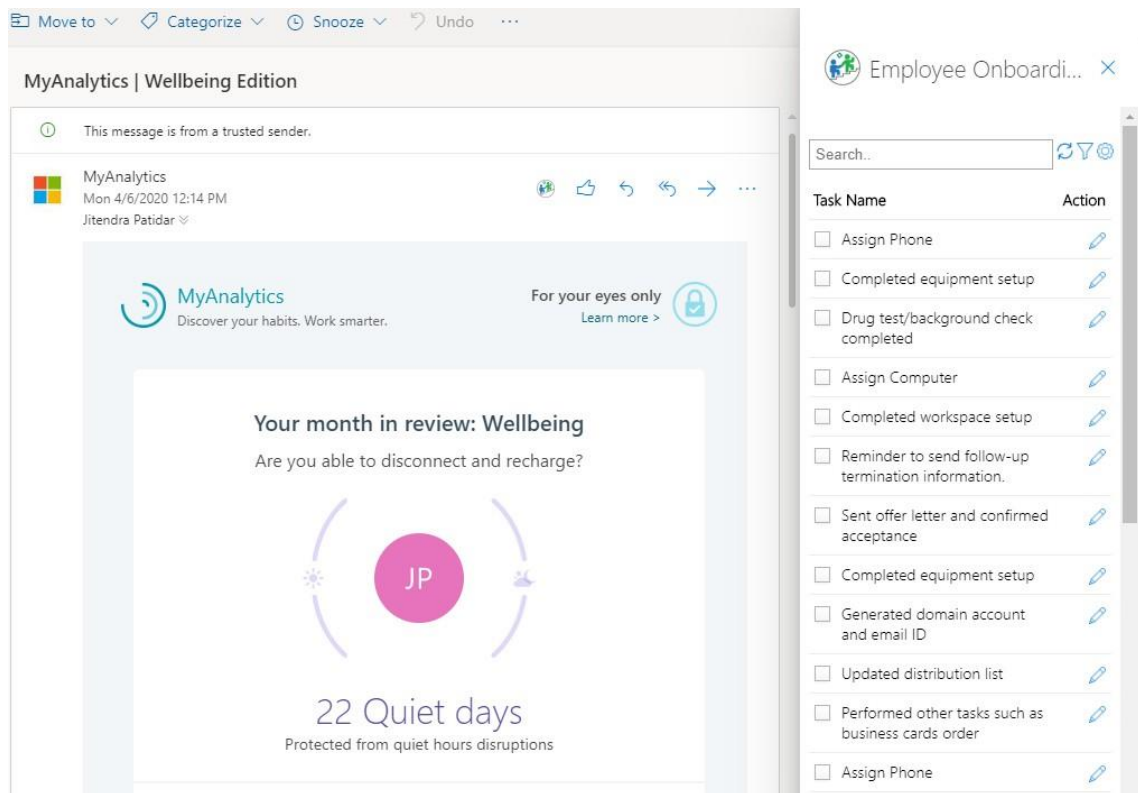
Click on more action option in right corner



Click on Employee Onboarding add in like below

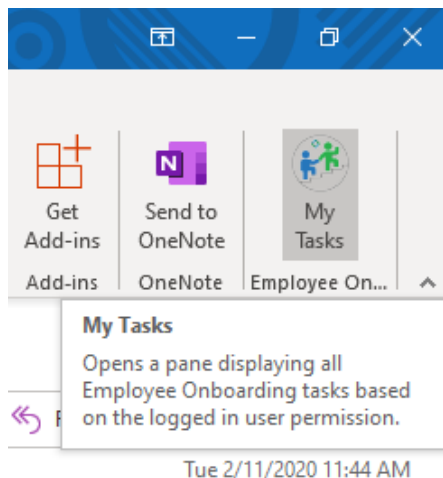


Employee onboarding add in will appear like below:

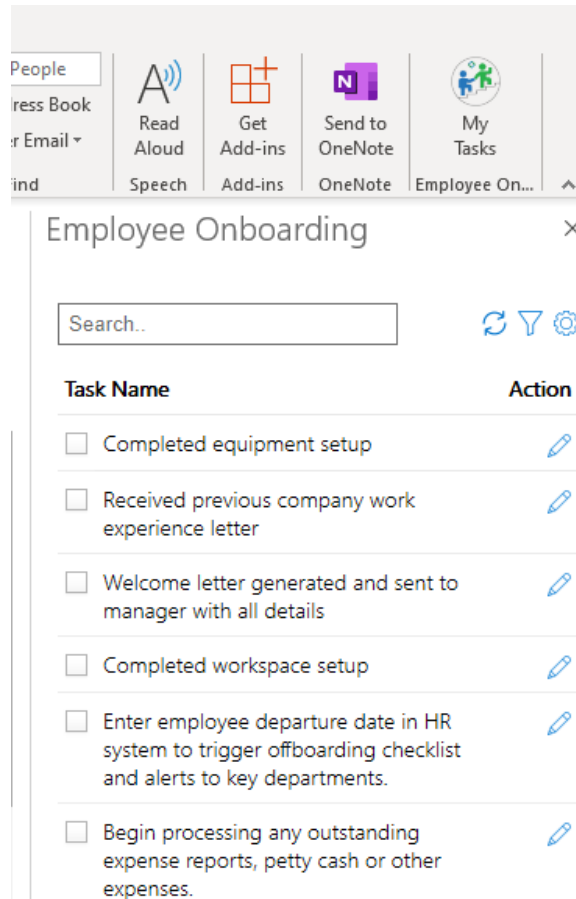


Using the Outlook add-in for Employee Onboarding My Tasks

Click on My Tasks to kick-start, as indicated in the image below:



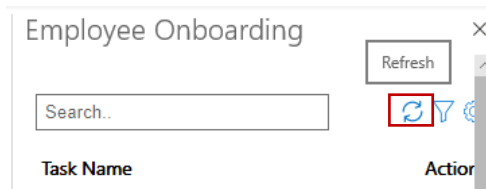
The Employee Onboarding pane will appear on the right, where you can view your tasks as indicated in the image below:



Note: The tasks visible here will depend on the user permissions.

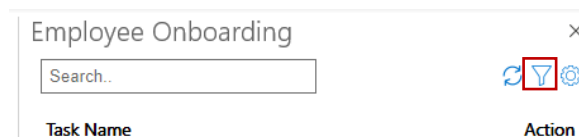
Actions

Refresh Tasks



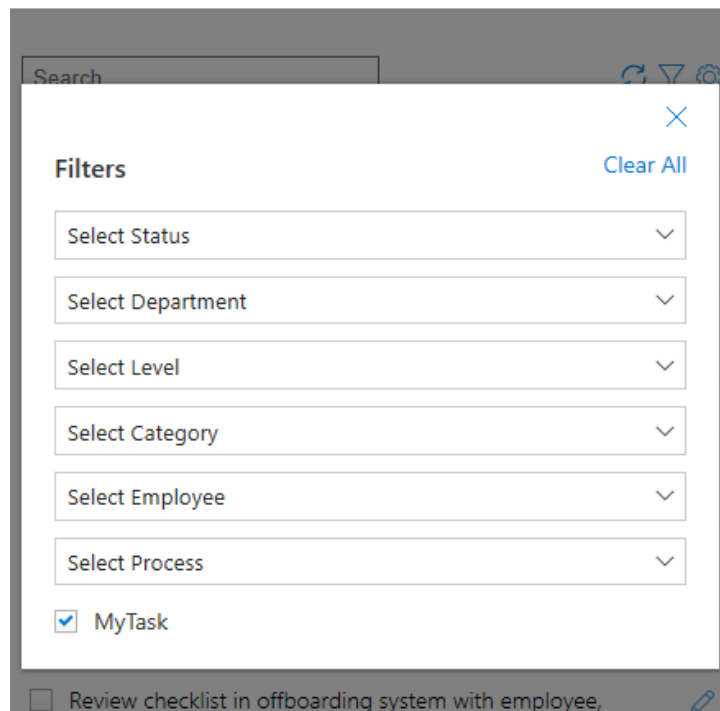
By refreshing, all the new tasks added will started appearing in the search results, making it easier for you to stay updated.

Filters



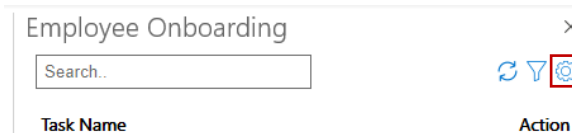
- Upon clicking, you will find a list of filters to apply to choose from, as indicated in the image below:

Employee Onboarding

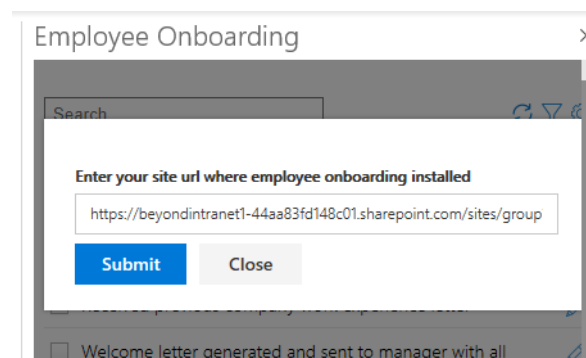
A screenshot of the 'Employee Onboarding' application window. A modal dialog titled 'Filters' is open, featuring a 'Clear All' link in the top right. The dialog contains seven dropdown menus: 'Select Status', 'Select Department', 'Select Level', 'Select Category', 'Select Employee', and 'Select Process'. Below these is a checkbox labeled 'MyTask' which is currently checked. At the bottom of the dialog, there is a checkbox for 'Review checklist in offboarding system with employee,' which is unchecked. The background application window shows a search bar and a table with columns 'Task Name' and 'Action'.

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

Configuration



A screenshot of the 'Employee Onboarding' application window. A modal dialog for configuration is open. It has a search bar at the top. Below it, there are two columns: 'Task Name' and 'Action'. The 'Action' column contains a gear icon, which is highlighted with a red square, indicating the configuration option.

- 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

A screenshot of the 'Employee Onboarding' application window. A modal dialog for configuration is open. It has a search bar at the top. Below it, there is a text input field with the placeholder text 'Enter your site url where employee onboarding installed'. The field contains the URL 'https://beyondintranet1-44aa83fd148c01.sharepoint.com/sites/group'. Below the input field are two buttons: 'Submit' (in blue) and 'Close' (in grey). At the bottom of the dialog, there is a checkbox for 'Welcome letter generated and sent to manager with all' which is unchecked. The background application window shows a search bar and a table with columns 'Task Name' and 'Action'.

Task Action

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

Task Name	Action
<input type="checkbox"/> Assign Desk	
<input type="checkbox"/> 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 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



Task Name	Action
<input type="checkbox"/> Enter employee departure date in HR system to trigger offboarding checklist and alerts to key departments.	
<input type="checkbox"/> 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