# Configuring the ONIT Outlook Add-In 2.1

1. Make sure that Extensions are enabled, and turn on the beta feature

Go to Administration. You should see a node labeled "Extensions".
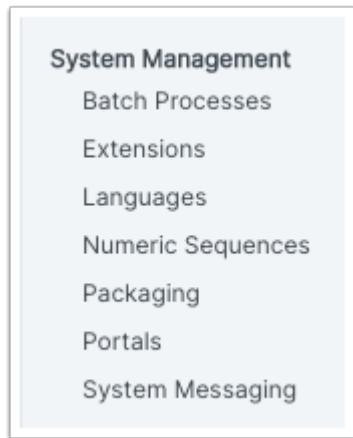

⚠️ If you don't see this node, you won't be able to continue further. Contact Onit Support.

Under Corporation Settings, find the Beta Features node. Make sure that the box labeled "Enable Outlook Plugin" is checked.

2. Configure a JSON Web Token auth provider

Go to the Designer of any app. Click on Auth Providers, under Global Configuration.
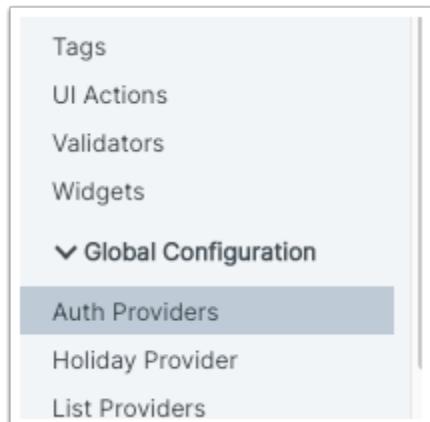
Click the + icon and select "JSON Web Token". Give your provider a name and a display name. Set Active User to DYNAMIC. The expiration time controls how long an add-in user can remain logged in; we recommend that you set this to the same value as a session for a user in the corporation. Make sure that the "Enabled" box is checked.

JSON Web Token

Name *

JWT for Outlook Add-In

Display Name *

JWT for Outlook Add-In

Active User *

DYNAMIC

Minutes until expire (default: 5 min) *

120

Enabled ☑

3. Configure an Office Extension

In Administration, go to the Extensions node. Use the + icon to create an Office Extension. Give it a name, and set the JSON Web Token Provider to the auth provider you just created. Set the Fully Qualified Domain Name to:

https://preview.d2unqgoiq5z2y8.amplifyapp.com

Office Extension

Outlook Add-In

Name *

Outlook Add-In

Fully Qualified Domain Name *

https:// prod.d38xh33vfm8qha.amplifyapp.com

JSON Web Token Provider *

JWT for Outlook Add-In

4. App Builder Configuration

The latest version of Onit's Outlook Add-in simplifies the initial setup and configuration by providing basic settings access via the Settings page for any app.

To enable the add-in for a particular app, go to the App Settings in Advanced Designer and select 'Enable Outlook Add-in' from Outlook Add-in section as shown below.
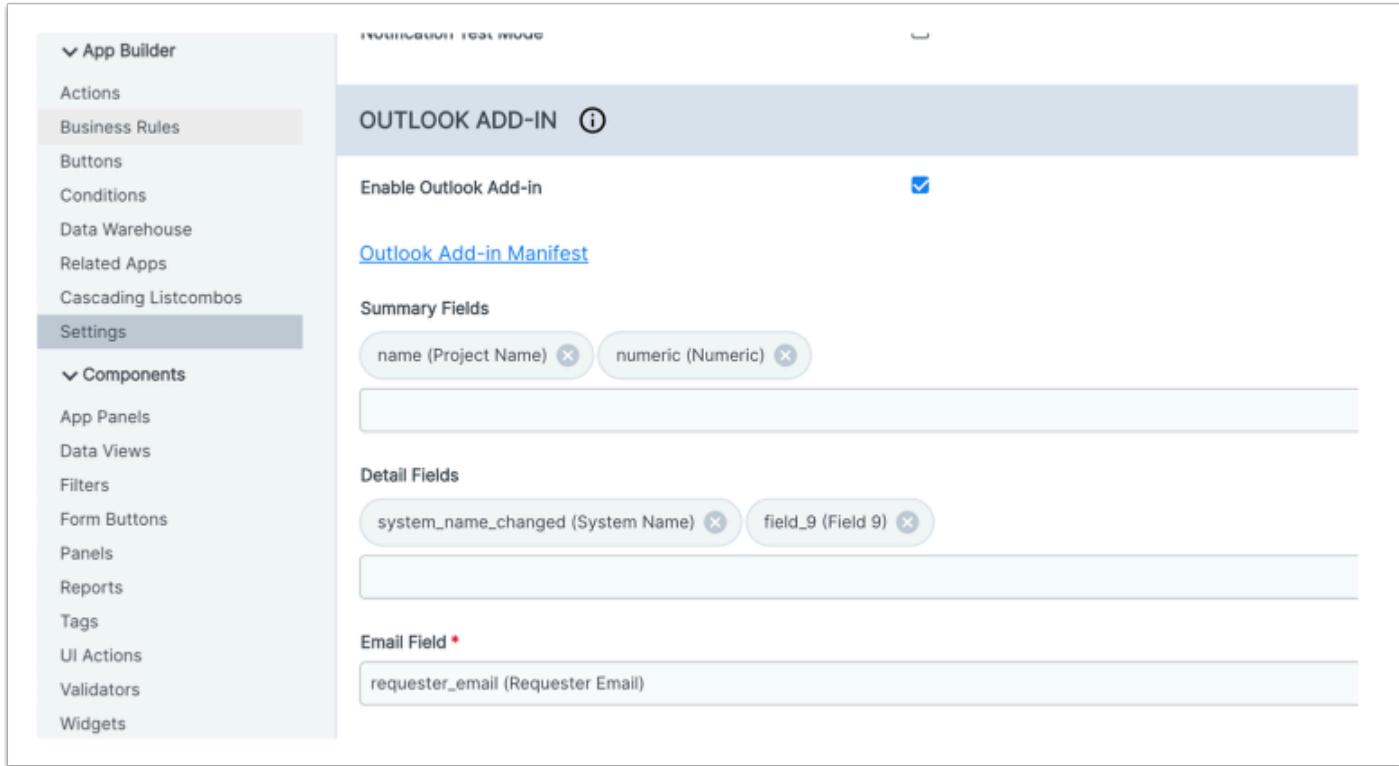
Add the following information to complete the configuration of your app for use in the add-in:

- Summary Fields: To specify fields used to search for records in your system, select the appropriate 'Summary Fields' to include. These values will be used to populate a list of fields that can be searched.
- Detail Fields: To specify fields that will be displayed if a user clicks the "See More" link on any record.
- Email Field: The "Email Field' should be the field in your app where the atom email address is stored. This information allows the add-in to link emails to the atom. This field is required.

NEW: New to Outlook Add-in 2.1 is the ability to copy the manifest URL used to install it.

These steps should be repeated for each app that should be enabled to work with the Add-in.

The rest of this document details usage in the Desktop version of Microsoft Outlook.

5. Add-In Installation

The latest version of the Onit Outlook Add-in can be installed as a custom add-in using the supplied manifest URL. The Outlook manifest is available at the following location:

https://[subdomain].onit.com/o365/manifest.prod.xml

NEW: The manifest URL can also now be copied from the Settings screen for any app (see above).

From Outlook desktop, a custom add-in can be added via the toolbar item shown below.

First we will need to generate an installation file for the add-in.

Navigate to the url that would be used for the installation

https://[subdomain].onit.com/o365/manifest.prod.xml

Right click on the page and select "Save As"

Click Save on the popup

Next you will need to navigate to the 'Get Add-ins' page in Outlook.
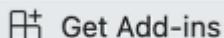
The location of the 'Get Add-ins' toolbar item varies between versions of Microsoft Outlook. Below is an illustration of the item in Outlook 16 with their new user experience enabled. If you cannot locate this item, please consult the Microsoft documentation for your version of Outlook. If you are still unable, please reach out to your IT organization to determine.
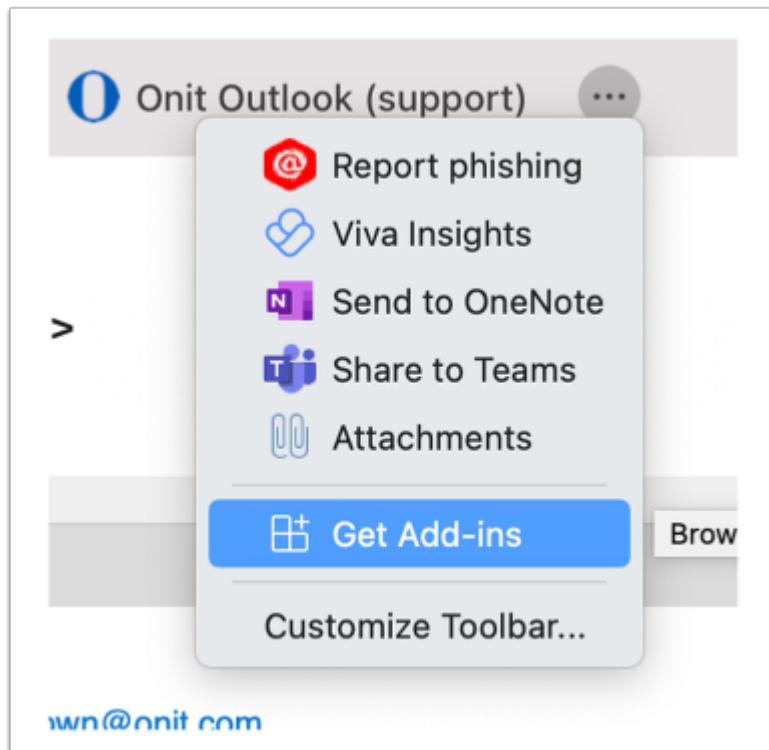
Clicking the 'Get Add-ins' toolbar item will open the Microsoft Add-ins store. The Onit Outlook add-in is not available on the Microsoft store so it will need to be installed manually. To install an add-in using a manifest file, select 'My add-ins' from the left menu as illustrated below and scroll to 'Custom add-ins' at the bottom.
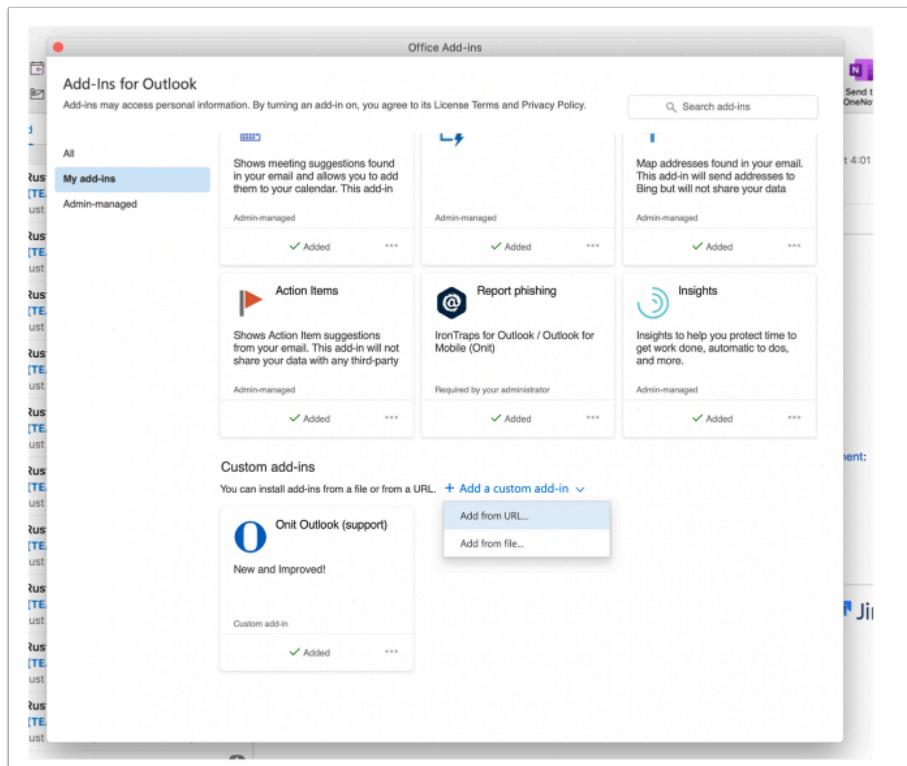
Select "Add From File", choose the file you previously downloaded and click "Open"

Once the installation is complete, links to the Onit Outlook add-in will appear in the toolbar as shown below:

> 💡 The Onit Outlook add-in can also be installed using Microsoft administration tools. If this is desired please reach out to your IT department to find out if this is an option.
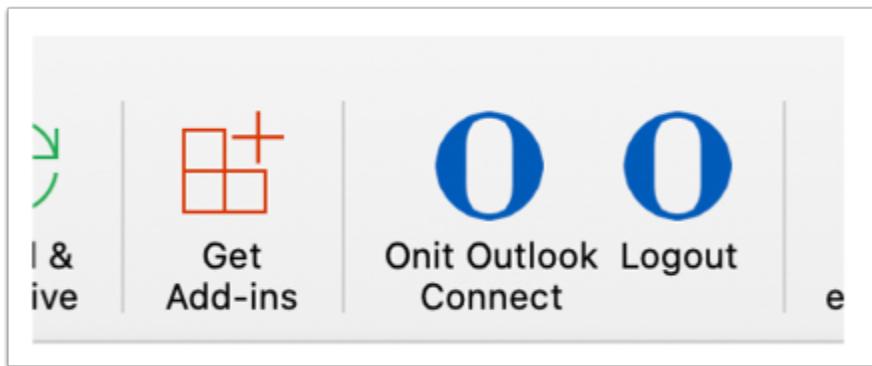
Click on 'Onit Outlook Connect' to open the add-in.

> 💡 It is possible to install more than one version of the add-in if you would like to access multiple environments (UAT vs, Production, etc). If two add-ins are installed, the subdomain will be noted in parentheses to help you pick the right one at the right time.

6. Logging In

When first opening the add-in, it will appear on the right side of the screen with a login prompt as shown below.
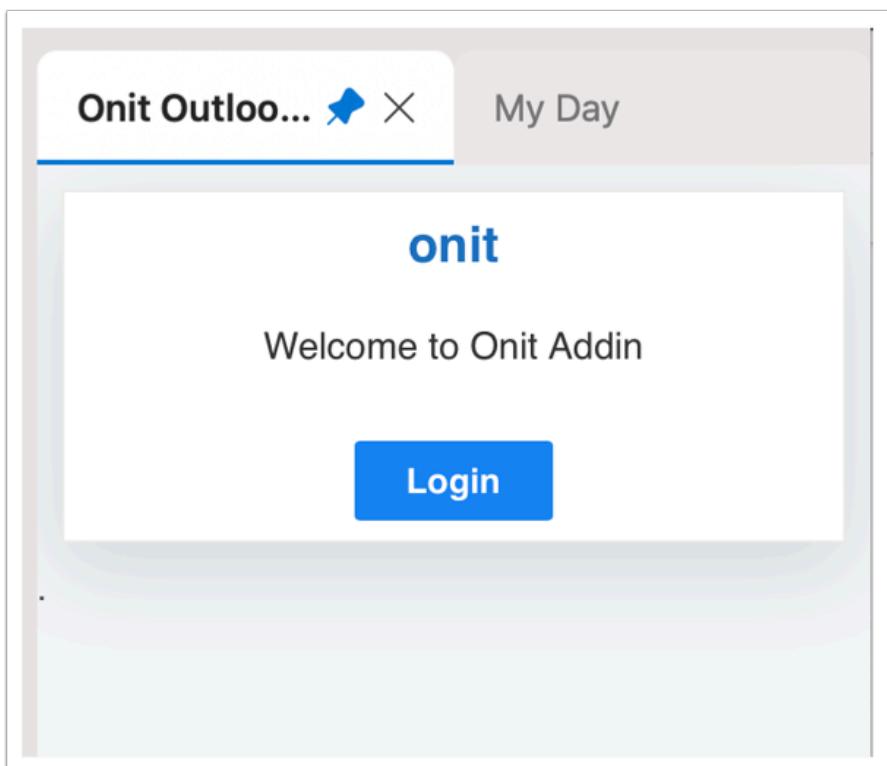
Click 'Login' to authenticate as you normally would to any Onit instance.

7. Add-In Main Menu

After logging in, you will automatically be redirected back to the add-in where you will see a header menu of options, shown below.
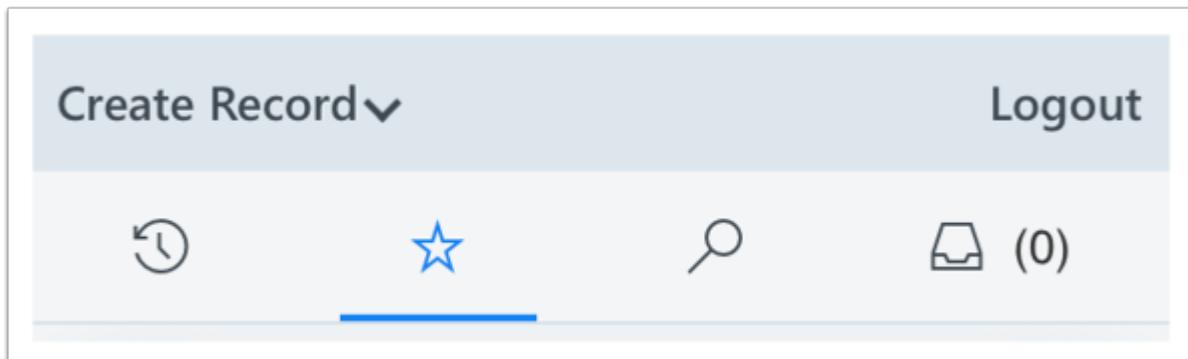
NEW: Creating a Record

In the latest version of Outlook, the 'Create Record' functionality has been moved from the Search tab to the main menu, pictured above.

To create a record, open the dropdown to select the type of record to create from the list of apps that have been configured to work with the add-in. An embedded browser will open to give you access to a typical Onit 'Create Record' dialog, shown below.
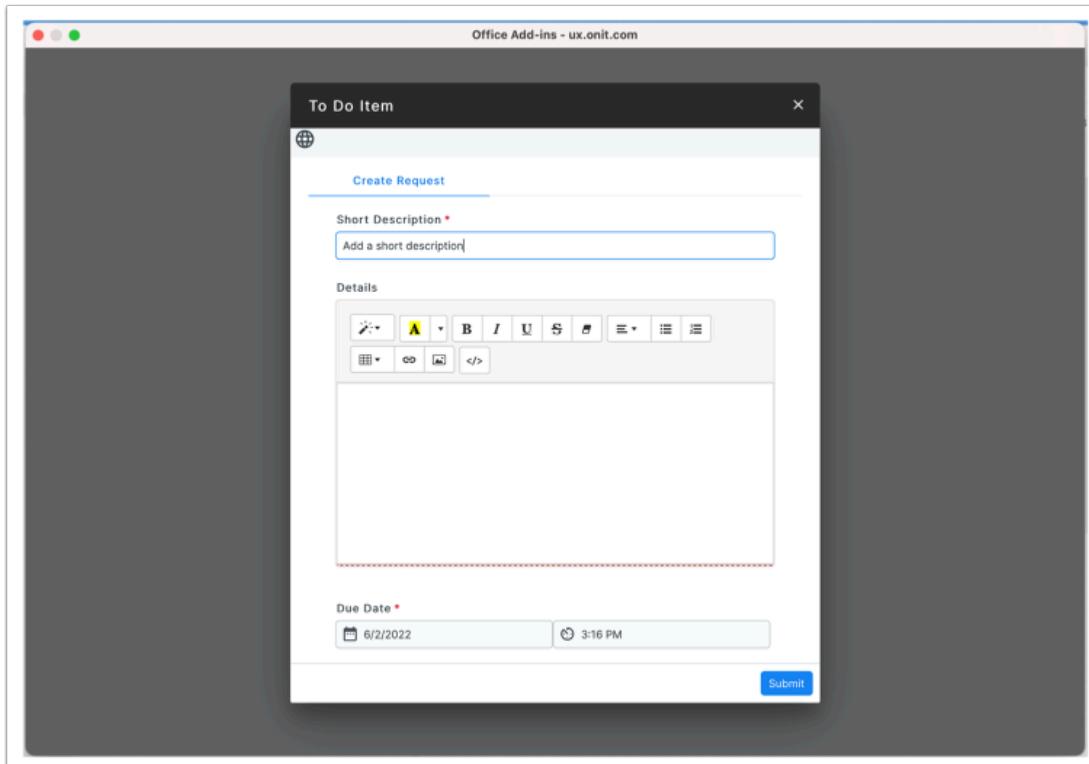

NEW: Logging out

In the latest version of Outlook, the 'Logout' functionality has been moved from the Search tab to the main menu, pictured above. Click this link to logout of the add-in.

The main menu tabs are described in more detail in section six of this document.

8. Pinning The Add-In Open
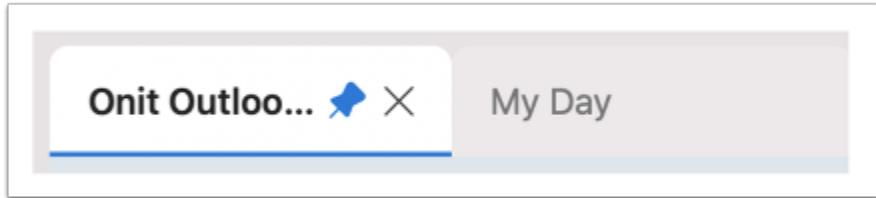
To always keep the add-in open as you navigate between e-mails, click the push pin icon next to the add-in name as shown below. (The location of the pin icon will vary between versions of Outlook).

9. Accessing Records In ONIT

The following functionality to allow access to Onit records is available from the main menu:

After a successful login, you will be navigated automatically to a list of your 'Recently Viewed' records. This list is generated automatically as you access records within the Onit system.
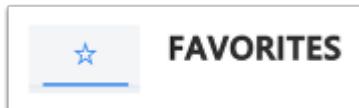
The 'Favorites' list contains links to records that you want easy access to. A record can be favorited directly from within Onit or from the add-in.
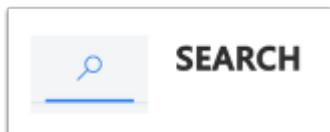

If you are looking for an Onit record that is not available from the 'Recently Viewed' or 'Favorites' tabs, you can use 'Search' to locate it. See below for additional documentation on the add-in's search capabilities.
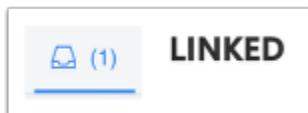
The 'Linked' tab shows all the records that have been linked to the email current visible within Outlook. An email can be linked to multiple records, so the toolbar menu item displays with the count of connected records.

No matter which method above is used to locate a record in Onit, the result will display as shown below.

The user can click on "See more…" to see additional fields that have been configured to display on the record.

The following actions can be taken directly from each result record:

▷	Linking	Use the link icon to send a copy of the current email to the selected record. Emails may be linked to multiple records. Once a link has been made, navigating to this email in Outlook will automatically retrieve the details for all records linked to the email and show them in the linked emails tab. If the current email has already been linked, this icon will not appear, and the following graphic will display instead. **ATTACHED**
★	Favoriting	Use the star icon to add this to your list of favorites.
✎	Editing	Use the pencil icon to open Onit in a browser embedded into Outlook. You will be automatically navigated to the current record where you can edit it, add child records or take other available actions.

10. Searching For Records

You can search for records in your system by navigating to the Search tab, pictured below.
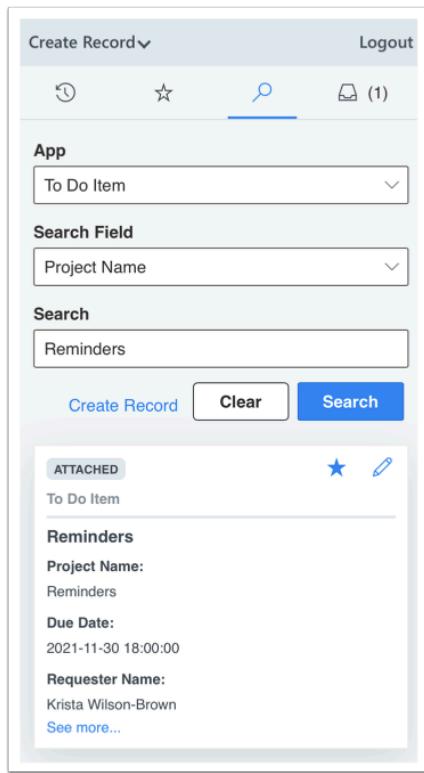
Searches can be performed one app and one field at a time. The available search fields will vary based on the configuration described in section one of this document.

To start a search, enter a value in the 'Search' field and click 'Search'. All matching results are returned as shown.

If you are unable to find a match and would like to create a new record, click the 'Create Record' link from the main menu. This functionality is discussed in more detail in section four of this document.