



POKESHOT
SMARTERPATH
ACTIVATE KNOWLEDGE - INCREASE PRODUCTIVITY

USER GUIDELINE **INSTALLATION** **SMARTERPATH** **FOR OFFICE 365**

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1

OFFICE 365 REQUIREMENTS





Thank you for your interest in SmarterPath, an innovative tool for employee enablement that allows you to implement modern workplace learning where it needs to be: in Office 365. The purpose of this document is to guide you through the installation process.

OFFICE 365 REQUIREMENTS

Office 365 Enterprise package (E1, E3 or E5) that includes SharePoint Online. Please note: SmarterPath is not available for SharePoint 13 or on-prem versions.



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PERMISSIONS / ADMIN RIGHTS



2. PERMISSIONS / ADMIN RIGHTS

SmarterPath is an Add-in for SharePoint Online and it has to be installed on a SharePoint site (root or non-root site). All users who have access to this SharePoint site can access SmarterPath. Here is a summary of the permissions / admin rights needed to set up the SmarterPath Add-in in your SharePoint environment. Find Please note: Find the latest version of the permissions and access rights [here](#).

- One user with permission to install SharePoint Add-ins
- SharePoint online access:
 - **manage access to tenant** (not full access): SmarterPath needs to get the list of the SharePoint site users to manage users in SmarterPath, e.g. Assignments.
 - **manage access to site collection** (not full access): SmarterPath needs access to the Documents uploaded in a SharePoint site in order to integrate them into Paths or to see set the SmarterPath Language based on a SharePoint site language.
 - **manage access to web** (not full access): SmarterPath needs the unique web ID to filter data for each Office 365.
- Office 365 global Admin (to authorize Graph access):
 - **User.Read**: delegate access to current User profile (SmarterPath needs to know who the current user is that opens SmarterPath, because the login process is handled by Office 365.)
 - Add-On (SmarterPath) access:
 - **Calendars.ReadWrite**: Access to calendars (Any activity in SmarterPath with a due date will create an Exchange calendar event in the users work calendar. For example if a user enrolls in a Path with a due date or in a Live-Training session.)
 - **User.Read.All**: Access to User profiles (SmarterPath has a people picker, e.g for assigning a Path to specific users or making someone an Instructor of a Live-Training session. Therefore SmarterPath needs the users profile data, such as Name, Email, Profile Picture, Department and Display Name.)
 - **Directory.read** and **Directory.ReadWriteAll**: Access to get Office 365 User roles (The SmarterPath Management settings need to know what current role in Office 365 the current user has, because some global settings can only be managed by Office 365 global Admin users.)
 - **Mail.Send**: Access to send emails to users (SmarterPath sends out notifications to users for certain actions, like getting a Path assigned, completing a Path successfully or if someone is made an owner of a Path).



3

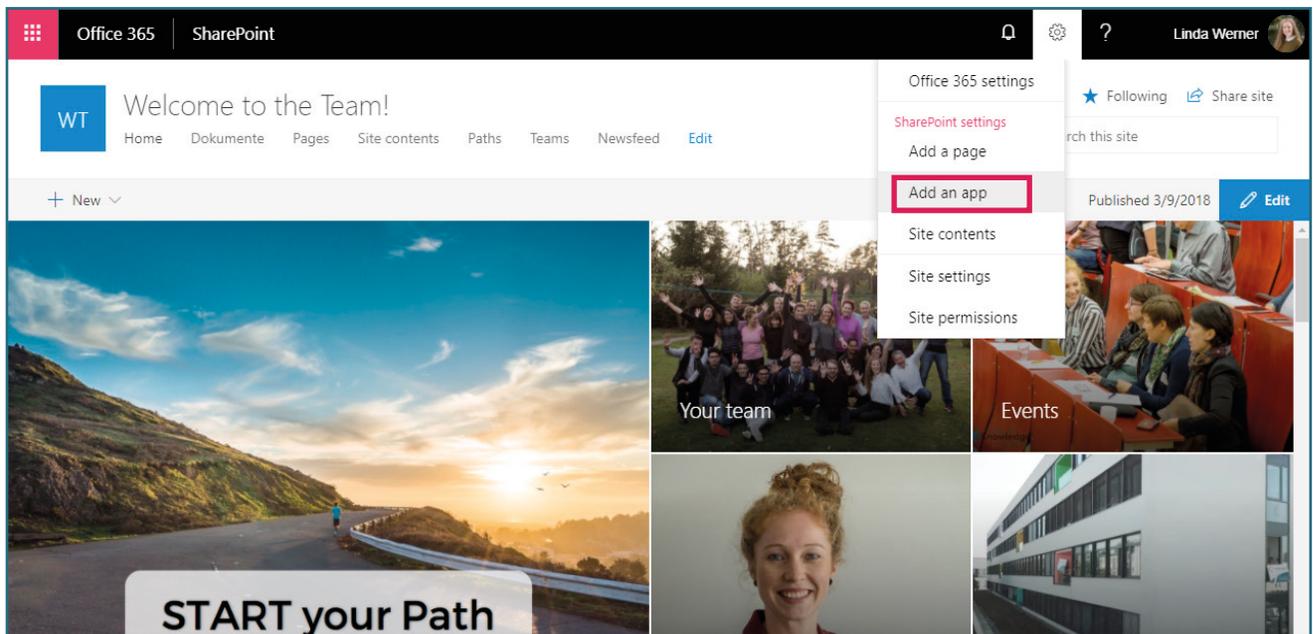
INSTALLATION INSTRUCTIONS



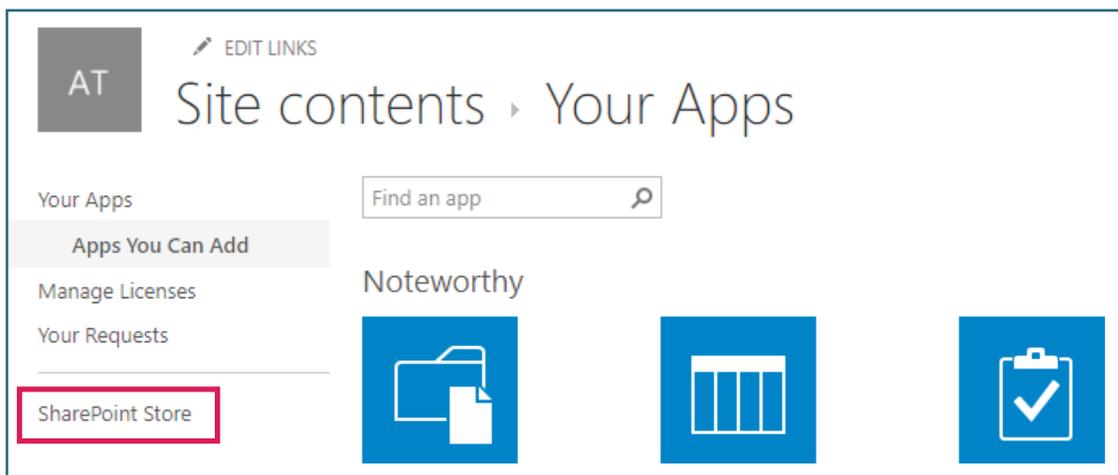
3. INSTALLATION INSTRUCTIONS

Please follow the instructions below in order to install SmarterPath on your SharePoint site. Please note that the installation process can be started by a SharePoint site administrator but an Office 365 administrator is needed to complete the installation process.

1. Navigate to your SharePoint Team site where you want SmarterPath to be installed.
2. Click **Settings > Add an app**.

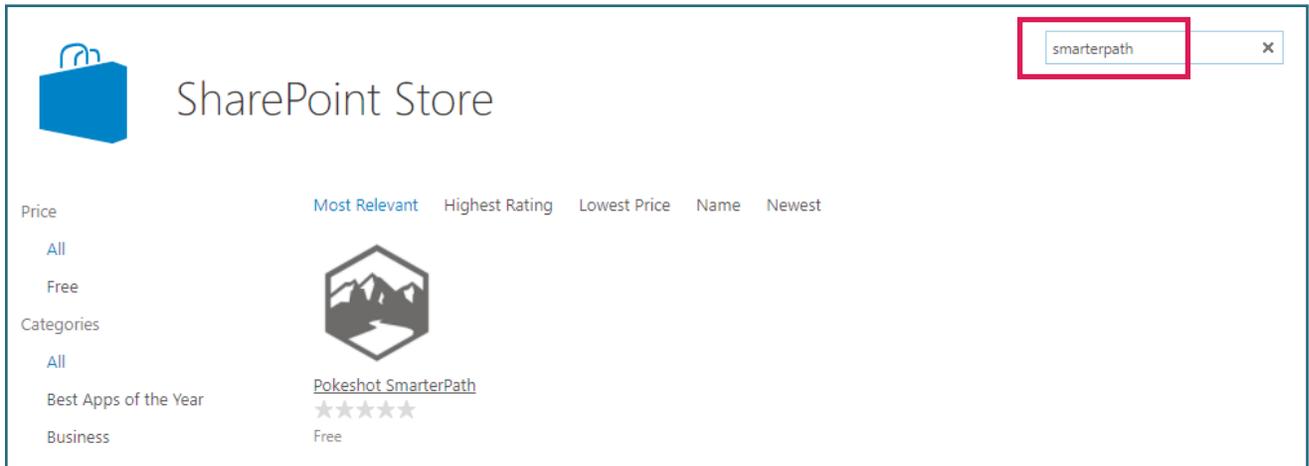


3. Click on **SharePoint Store**.

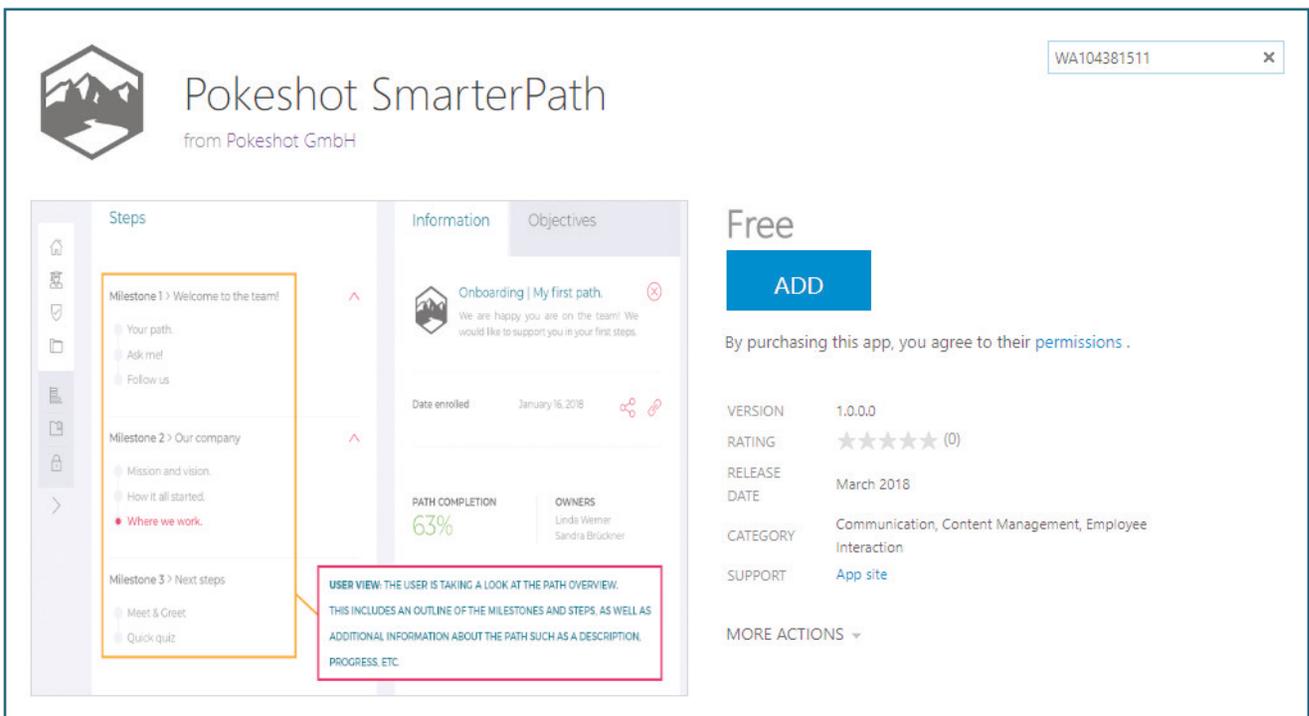




4. Search for „**SmarterPath**“ in the SharePoint Store.

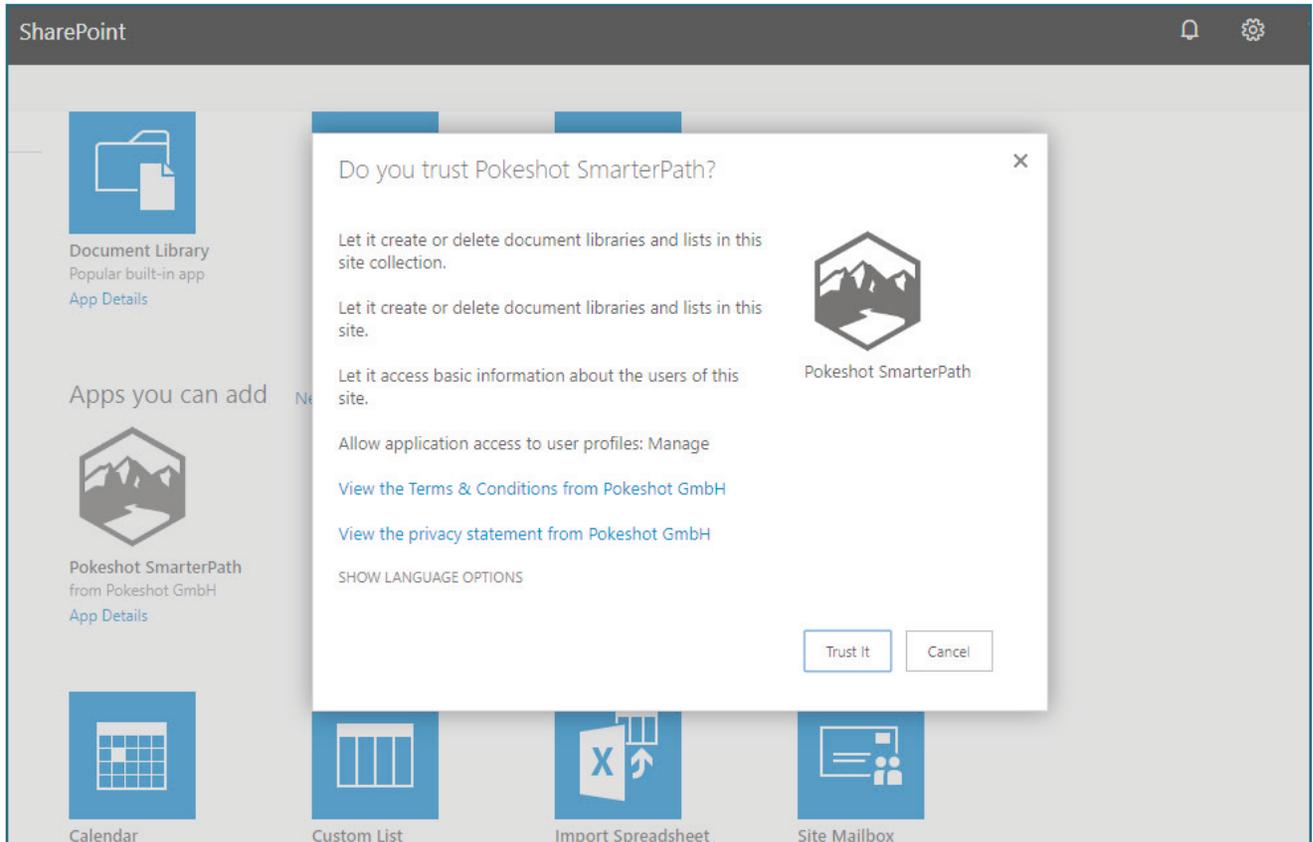


5. Click **Add** to start the installation process.





6. Click **Trust It** in the pop-up window.



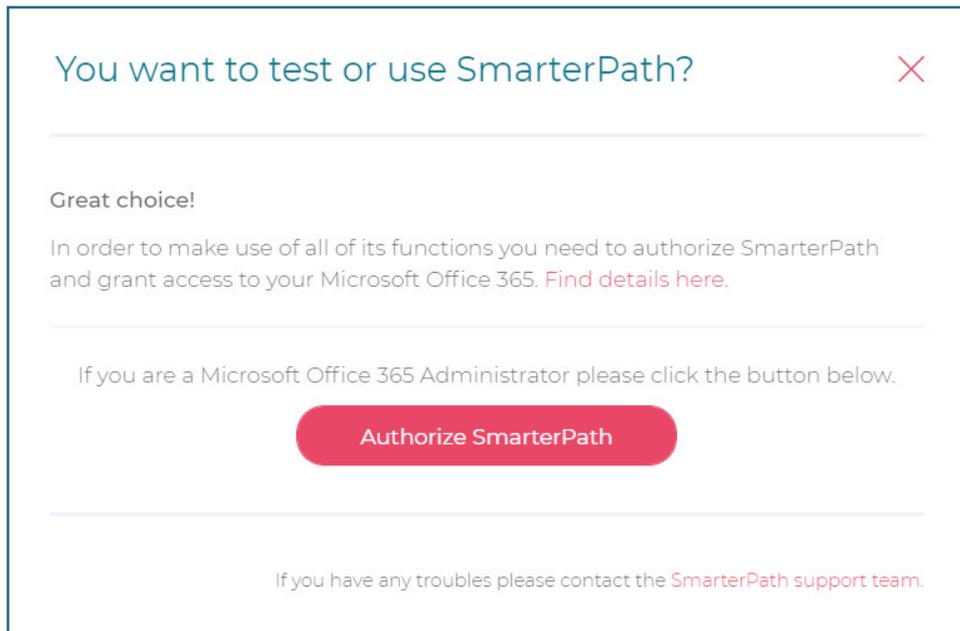
7. You should be redirected to the Site contents page of your SharePoint site. (If not click **Site contents** in your SharePoint site) Please note: the Add-in SmarterPath is grayed out until the installation is finished. Please refresh the page if needed then click on **SmarterPath** in the content list.

	Surname	grade	Items	Modified
	Documents	Document library	36	13.12.2017 08:06
	Form templates	Document library	0	13.12.2017 06:26
	Site Assets	Document library	6	03.01.2018 05:15
	Style Library	Document library	0	05.12.2017 13:56
	Events	Events list	4	03.01.2018 05:15
	Site Pages	Page library	2	23.01.2018 05:18
	Smarterpath	app		03.04.2018 15:55



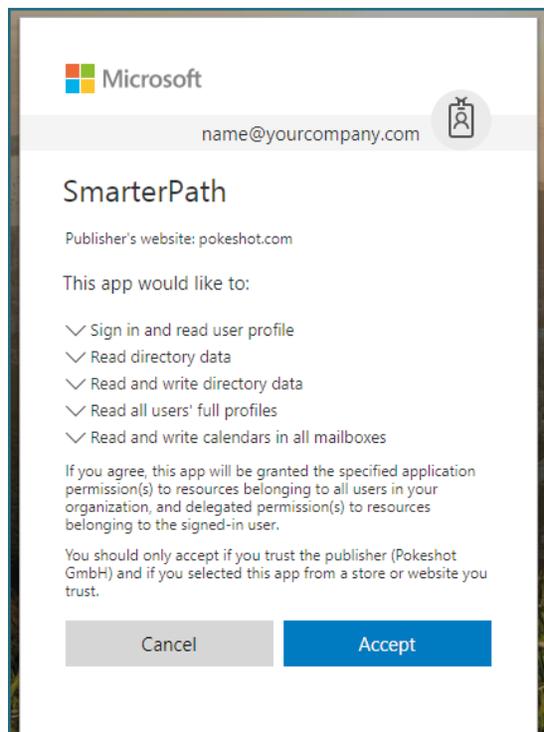
8. After you click **SmarterPath** in the SharePoint site's content list, the following pop-up window will appear. If you are a Microsoft Office 365 Administrator click **Authorize SmarterPath**.

Note: You might have to allow pop-ups.



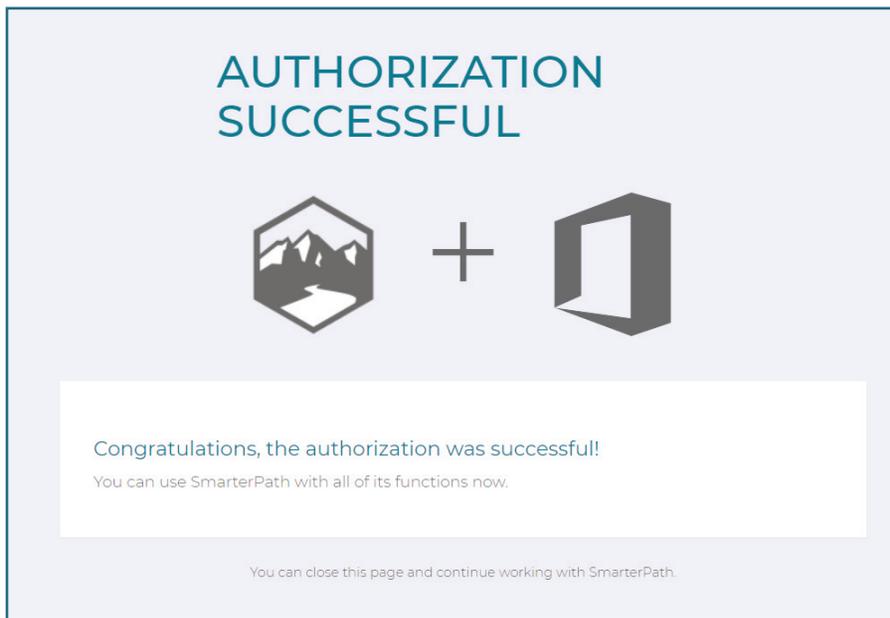
9. Select the appropriate Office 365 administrator account and sign in.

10. Review the app's permissions and click **Accept**. Find the current permissions [here](#).

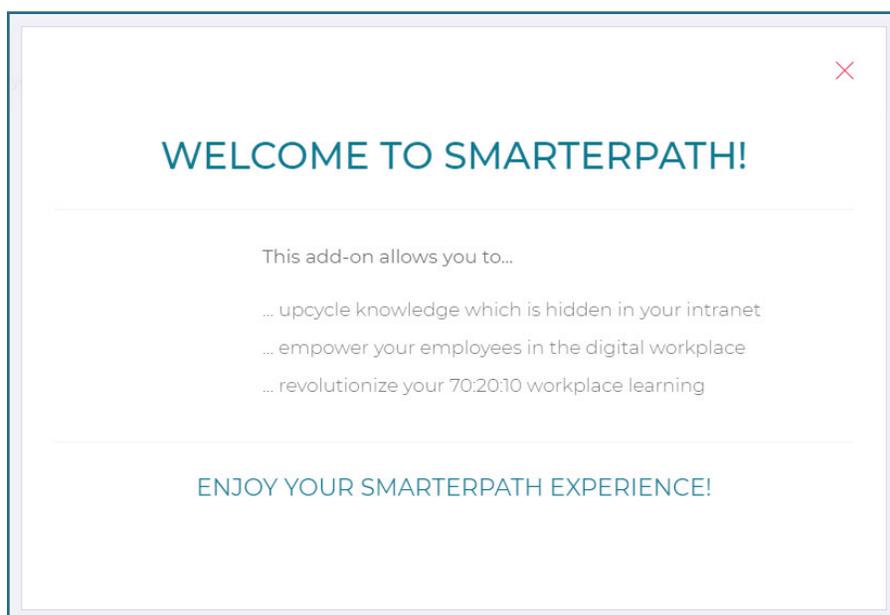




11. Once you have successfully completed the authorization process, you can **close the window** shown below and begin working with SmarterPath. Please note: the first user of SmarterPath is given admin rights to the Add-in. A SmarterPath admin can assign admin and creator rights to other users once they have opened SmarterPath and the Add-in has recorded their credentials as a registered user.

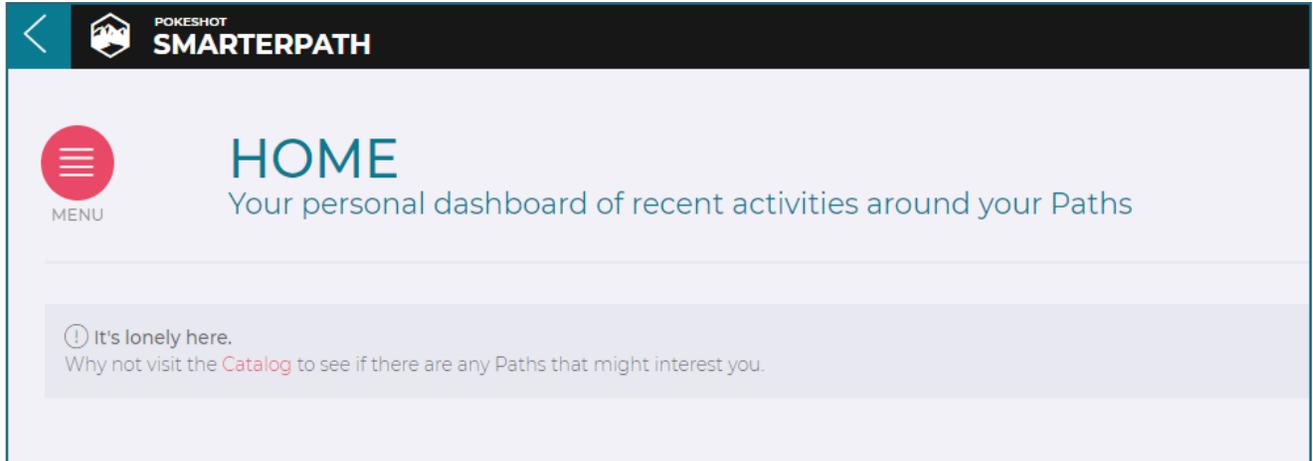


12. The first time you (and any other user) opens SmarterPath a pop-up window appears, providing you with a brief description of the purpose of the Add-in.

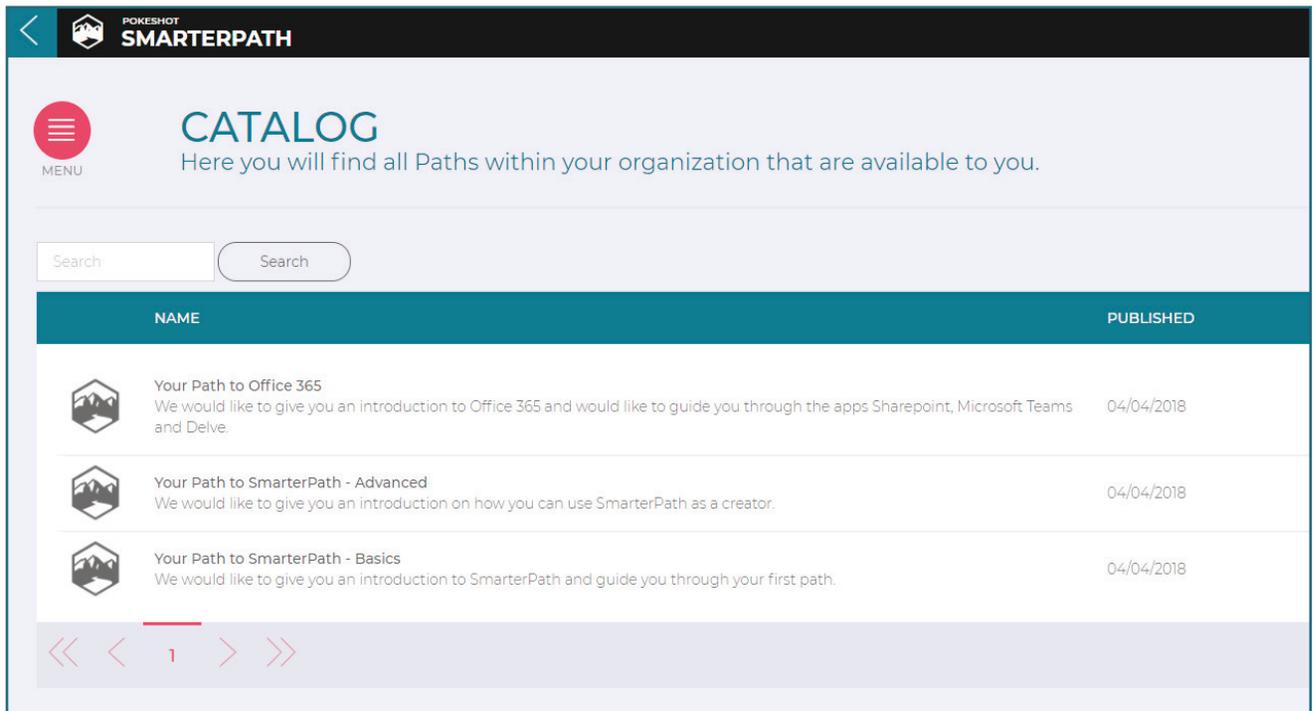




13. Click the red **X** to close the pop-up window and return to SmarterPath's landing page: **Home**.



14. The installation of SmarterPath also includes three pre-created paths. Click on **Menu** and then **Catalog** to access each one of the Paths.



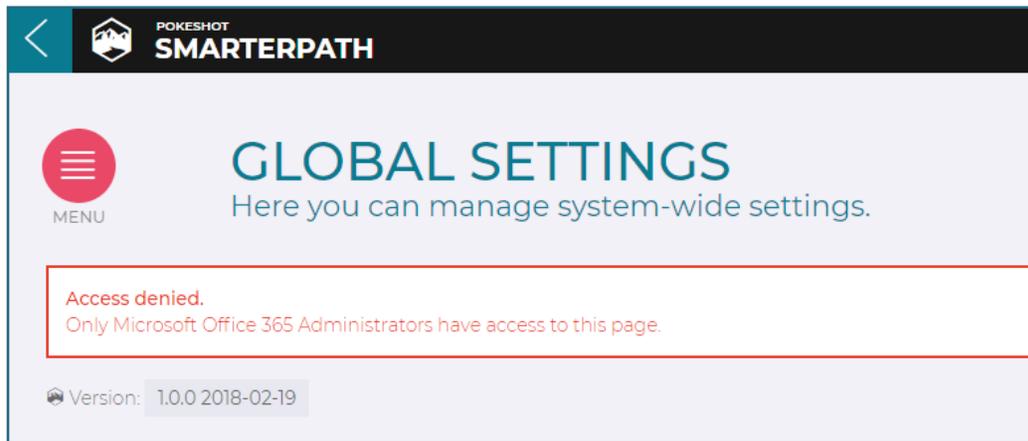
Note (SmarterPath Administrator or Creator roles only):

- You can use and/or edit these paths depending on your needs. If you delete a path then it is permanently removed from your SmarterPath.
- If you don't want a path to be live to everyone who has access (all people in the SharePoint site where it's installed) you can select "Draft" under each path's Settings menu.



Additional Information

If you purchased SmarterPath (versus installing it for a 30-day trial), please click **Menu** and then **Global Settings** (only Office 365 administrators have access) to add your license key. Please note that it can take up to 30 minutes to process the authorization; this is why it's possible for a user to get the following error even though he/she is an Office 365 administrator:



Do you have any open questions? Please feel free to contact us via [Support: Pokeshot Helpdesk](#).

Additional resources (Microsoft)

- [Marketplace](#)
- [AppSource promo video](#)
- [SmarterPath in the Marketplace](#)
- [Installing apps to a SharePoint site](#)
- [Custom app catalog](#)

Additional resources (Pokeshot)

- [Requirements to install SmarterPath on Office 365](#)
- [Access Requirements to install SmarterPath to Microsoft Office 365](#)



AT LAST

You have now **SUCCESSFULLY** installed
SmarterPath.

ENJOY!

Your team from Pokeshot SmarterPath

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