

CLEAR REVIEW

Microsoft OneDrive Integration

Guidance document for setting up Microsoft
OneDrive integration with Clear Review

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1. Evolving Check-In notes and goal-tracking with Microsoft OneDrive

We're enabling employees to add context to Check-ins and Objectives by uploading files and images to their OneDrive account, direct from Clear Review, and have the link or image displayed in Check-In Notes and Objective comments. This is useful for showcasing proof of achieving objectives and for capturing whiteboard photos or notebook photos from conversations.

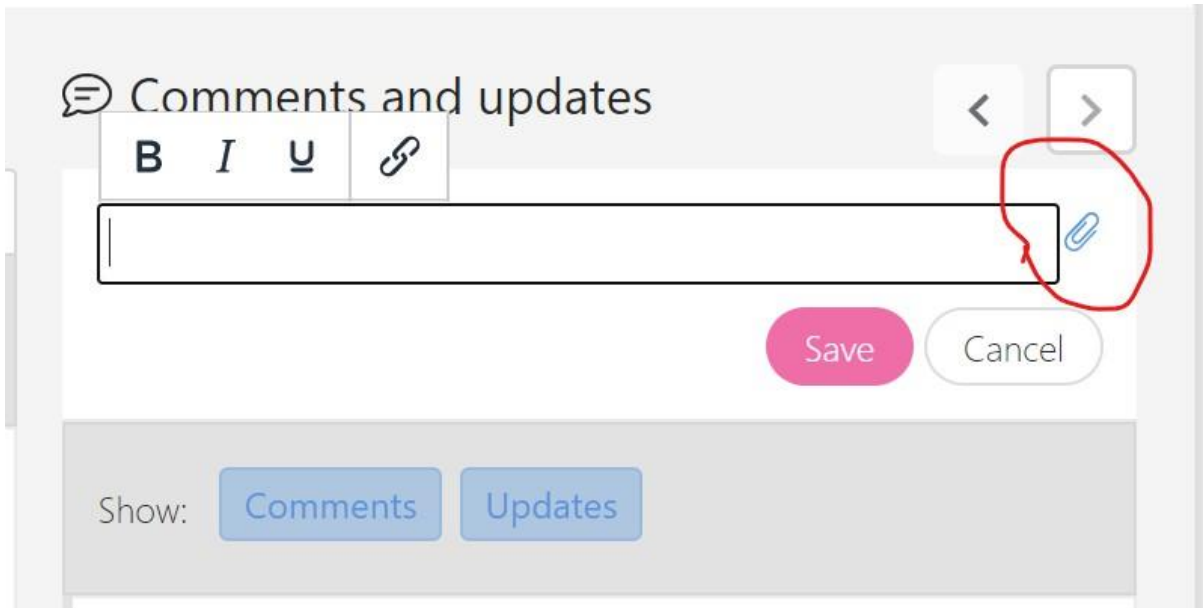


2. How does it work?

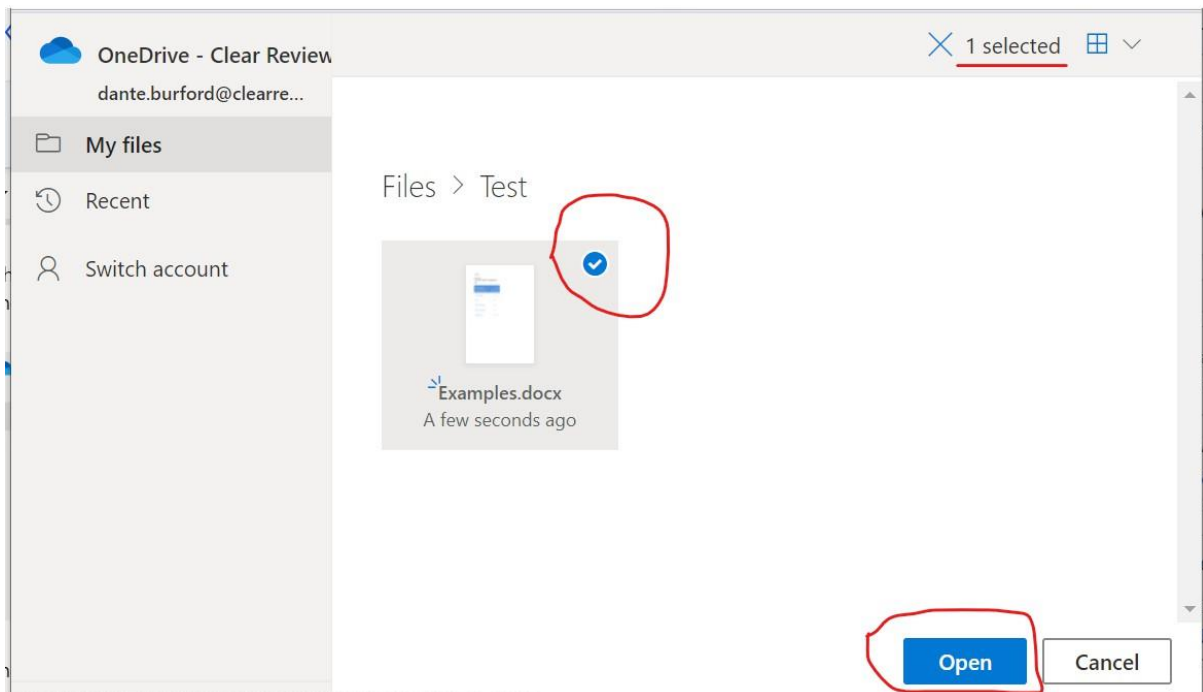
The feature is switched OFF by default. You can turn on the ability to add attachments to check-ins or objectives independently. To turn it on, go to the Integrations section on the Admin page and switch on the feature for check-in notes and/or objective comments:

A screenshot of the "Integrations" settings page. The page has a header "Integrations" and a warning: "Do not change these settings without first consulting Clear Review customer support". Below this are several settings sections: "Configure how long a session continues until a user has to log back in" with a value of "Default - Users have to log in again if they are inactive for 14 days (Best for user experience)"; "Single Sign-On Settings" with a "Change" button; "FTP User Data Upload Password" with a "Change" button; "Enable attaching files to Conversation Notes from Microsoft OneDrive" with a "Yes" button selected; and "Enable attaching files to Objective Comments from Microsoft OneDrive" with a "Yes" button selected. A red circle highlights the "Yes" buttons for both OneDrive integration options.

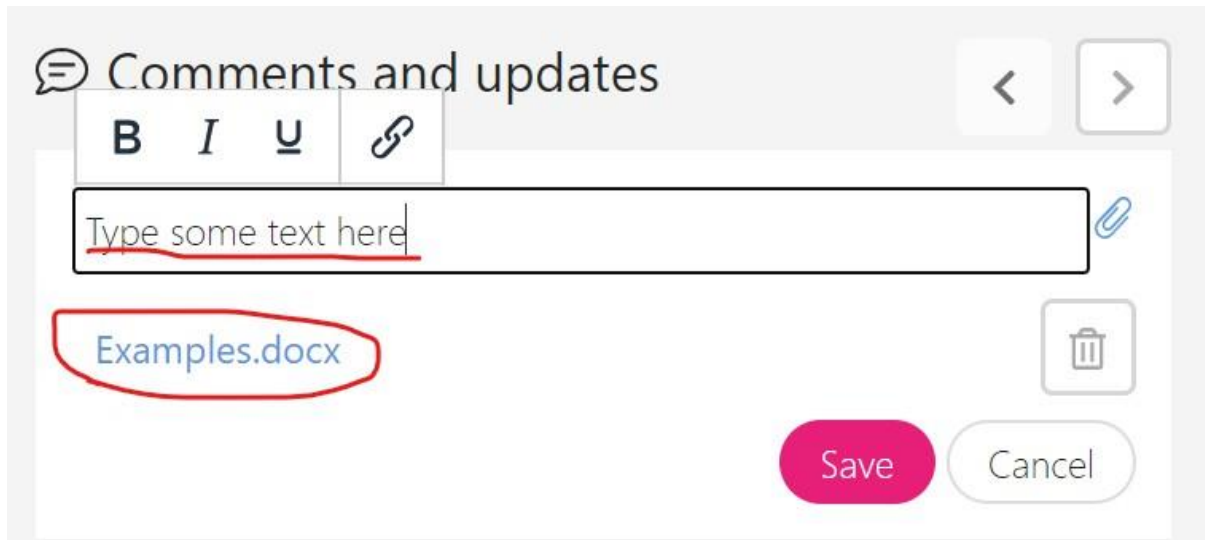
Once this feature is turned on, an attachment (paperclip) icon appears on the check-in notes section or the objective comments section:



When this icon is clicked, your employees may see a pop-up that asks them to authenticate with their Microsoft account. Once authenticated, they can choose a file to upload to their check-in.



Once they have clicked Open, this link will be added to the check-in note or objective comment. They will need to add some text to the check-in note or objective comments before saving.



This link will be view-able to both employee and manager, providing the document's permissions within OneDrive is set to 'Shared'.

'Need Admin Approval' If you are prevented from attaching OneDrive files by error messages indicating that approval from an Admin is required, it's possible that additional configuration is needed by your IT team to ensure a seamless process. Please refer to your IT and direct them to the following documentation from Microsoft regarding the "Consent Workflow":

<https://docs.microsoft.com/en-us/azure/active-directory/manage-apps/configure-admin-consent-workflow>

<https://docs.microsoft.com/en-us/azure/active-directory/manage-apps/configure-user-consent>



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