



# SP Marketplace HR Portal How-It's-Built

Module Version 11.0



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## Introduction

The SP HR Portal How-It's-Built document reviews the application's basic design, its SharePoint components, and provides a summary of the administrative tasks you must do to maintain the application.

### Overview

Refer to the *SP HR Portal How-It-Works V11* document for an application overview.

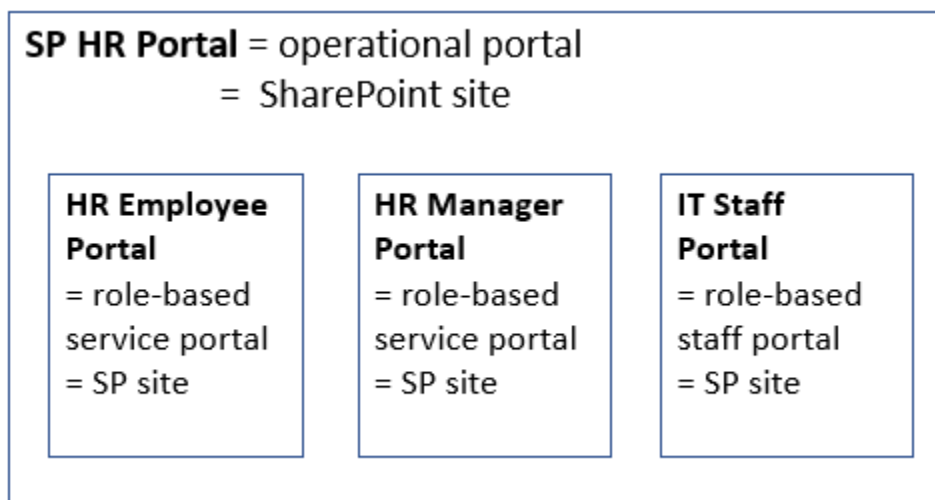
### Template Design

The first step to understanding the template design is to refer to the Portal Design section of the *SP Marketplace HR Portal How-It-Works V11* document. Secondly, read the following to get an understanding of the actual SharePoint components utilized in the overall design.

The SP HR Portal is an operational portal that provides a template solution to enhance an organization's use of Microsoft Office 365 and SharePoint implementation. The SP HR Portal is a SharePoint site that contains SharePoint pages, lists and libraries.

This HR operational portal consists of three role-based service portals called the Staff Portal, the Manager Portal, and the Employee Portal, each of which is a SharePoint page with SharePoint supporting pages, lists and libraries.

The following diagram illustrates this operational portal/service portal concept.



### Related Resources

- [SP HR Portal How-It-Works V11](#)
- [SP HR Portal Customization Guide V11](#)

## Basic Design Principals

### Native SharePoint

All the SP Marketplace applications, including the SP HR Portal, are SharePoint templates that were built on the Office 365 and SharePoint platform allowing them to leverage all the native Office 365 and SharePoint components and applications. The SP HR Portal application therefore adapts to any future Microsoft 365 changes and is also 100% customizable by SharePoint business power users.

The SP HR Portal application utilizes native SharePoint sites, lists, and libraries. What is not included or used in the application are content types, or site columns.

The SPMP Administrator has the capability to customize the out-of-the-box template. For details on customizing the SP HR Portal template, please refer to the *SP HR Portal Customization Guide V11* document.

This application supports all versions of SharePoint 2013 and 2016 both on premise and Office 365 SharePoint Online. SharePoint Foundation for on-premise installations is NOT supported. The minimal level for support is SharePoint Standard Server.

### Added Features for SharePoint

While we strive to build our templates using standard SharePoint features, lists, libraries and pages, we also included a set of tools which allow for enhanced usability without taking away the ability to customize the application using the SharePoint web interface. The following tools and features have been added to our templates behind the scenes:

- Dynamic Forms (DFFS) – enhanced form building tool that allows for tabs, rules driven form displays, headings, help notes, etc. This is a fantastic tool, learn more for the DFFS docs in our customer portal
- Virtual Lookup – this is a feature of DFFS that allows for cross list/library links from any items. We use this to build our Super Views.
- Tabs on site pages to present extra details in a simple and organized manner
- Enhanced alerts and notifications utilizing the Infowise SharePoint Smart Apps (Note: If using SharePoint On-Premise, then SharePoint Workflows are used.)
- Smart Import tool is used to import external data from email, databases, web forms, web services etcetera
- Optionally create service requests from incoming email using Infowise Smart Import

All the above features have corresponding documentation available on the SP Marketplace Customer Portal. We recommend that the SPMP Administrator learn the DFFS tool in order to utilize its many capabilities.

## Look and Feel

The SP Marketplace design team has the objective of maintaining a consistent look and feel across all its applications, as well as to match the Office 365 look and feel.

The application uses the standard Oslo site layout. Changes to the layout, colors and fonts can be made using standard SharePoint page editing and with our CSS Style Designer tool.

## Navigation

The SP HR Portal application utilizes the Oslo site layout which has a top navigation bar only. The navigation may be customized by the SPMP Administrator by using the SharePoint Publishing feature which has been turned on. To limit the audiences of the navigational menu items, the SPMP Administrator can change the Audience settings under Navigation in Site Settings.

The Top Navigation Bar is home to most of the functions in the SP Department Portal application.

The Administration menu item should only be available to the SPMP Administrator and includes template setup, license management and a link to the SP Marketplace Customer Portal.

## Security

The SP HR Portal application provides functionality to prevent users from seeing information that is not relevant to by ... <MORE GOES HERE> SharePoint Audience settings allow menu item restrictions to the end user.

A good term for this restriction might be "soft security". These techniques are mostly applied for ease of use and while they may appear to provide some level of security they really do not – as there are techniques, not “simple” for users, to access any data that they have SharePoint Permissions to see and use.

If there is a need to prevent users from seeing any service requests that they did not create, that restriction can be setup through List Item Level security and can be implemented by utilizing SP Marketplace’s customization services. To fully protect information stored in SharePoint lists and libraries, SharePoint permissions must sometimes be used at the item level.

## Permission Levels

The general structure of access for these sites and the default Quick Start permissions at setup is as follows:

Permission Group Name	Description	Permission Level
<b>SPMP Admin</b>	Your company's Administrator for the SP Marketplace products	Full control
<b>HR Staff</b>	HR Department staff who manage service requests submitted by employees and who manage employee data	Contribute
<b>Managers</b>	Managers who have access to their employees' non-confidential data and can submit their employees' status changes for approval	Contribute
<b>All Users</b>	The employees who need to submit a service request, submit their employee data changes to HR and access Department related resources	Contribute

The SP HR Portal application uses standard SharePoint permissions. All the users will be assigned to out-of-the-box SharePoint Groups using out-of-the-box permissions. The groups above are setup as part of the Quick Start Service. If the Quick Start service was not purchased, the SPMP Administrator will need to set up these groups and permissions.

The user's role will drive access in the following areas:

- Sites – only department staff can access the main department pages
- Home Page – Non-department staff will be redirected to the Employee Portal page
- Lists – Only department staff can access lists beyond service requests
- Forms – Using Dynamic Forms, only department staff can see tabs beyond the General Tab
- Navigation – The Left Navigation is hidden in the Employee Portal, and the Navigation can be controlled in the Department page through audiences

The assumption for the template design is that all internal department staff can access all department data. If access is to be limited for department staff, the SPMP Administrator will need to add permissions, or SP Marketplace's customization services can be utilized to setup a custom permission structure.

**IMPORTANT:** The permissions level of the SP Marketplace ID should NEVER be changed, because it can break functionality in the application. That ID should always be in the SPMP Admin group which has full control. If you wish to restrict SP Marketplace access, then you should change the password and not the permissions for the SP Marketplace SharePoint userid.

## Portal Administration

The Admin menu is home to all the administration pages. These pages offer links/tiles to open maintenance functions pertinent to a specific role. The following is an explanation of each of the available tiles on each of these pages and their function.

### Application Page

#### HR Portal Configuration

**Getting Started:** Access the getting started instructions and training for first-time application setup.

**Service Categories:** Manage the HR Service categories that are used to categorize a knowledgebase article as well as categorize a service request submitted to the HR Department.

**HR Portal Tiles:** Manage the tiles displayed on the HR Portal.

**Employee Portal Tiles:** Manage the tiles that appear on the Employee Portal.

**Staff Portal Tiles:** Manage the tiles that appear on the Staff Portal.

**Manager Portal Tiles:** Manage the tiles that appear on the Manager Portal.

**Configure Navigation:** Manage the navigational menu items.

**Site Permissions:** Assign user permissions by adding a user to a group.

**Site Images:** Manage the Site Images folder.

**Smart Tools:** Access Smart Tools.

**Configure DFFS Rules and Tabs:** Configure Dynamic Forms for SharePoint to for list forms to change rules and tab content.

**Style Designer:** Style Designer to test changing page elements colors and generate a new style file.

**Change Logo:** Change the logo in the site header.

**Configuration Reference:** The Configuration Reference for administrative tasks to manage the portal.

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### Installation Page

#### Installation Setup

**Configure Links to other HR Sites:** Configure the URLs to the other HR Operational Sites.



**Configure Navigation Links:** Configure navigation quick launch bar.

**Configure Intranet URL and Shared:** Configure the Intranet site URL and the Shared Mailbox for alerts.

**Setup Permissions:** Setup permissions.

**Setup SP Experience:** Utility page with buttons for setting Classic and Modern SP Experience.

## HR Portal Configuration

See *HR Portal Configuration* in the *Application Administration* section above.

## Support Page

### Support Assistance Links

**SPMP Customer Support Portal:** Access SP Marketplace Customer Support Portal to access our knowledgebase, submit support tickets, see submitted cases, fill out the New User form, and submit feedback to SP Marketplace.

**HR Support V11 Playlist:** Training videos for HR Portal V11 YouTube Playlist.

**Support:** Submit a support ticket to SP Marketplace.

## Template Components

The SP HR Portal application is a SharePoint site that includes the following role-based portals:

- HR Base Portal
- Employee Portal
- Manager Portal
- Staff Portal

### HR Base Portal Components

HR Base Portal Content	SharePoint Name (Site Contents)
Portal tiles (Promoted Links)	Promoted Links
Announcements	Announcements
Document Center	Document Center
Employee Recognition	Employee Recognition
Knowledgebase	Knowledgebase
Department News	Organization News
Department Events	HR Events Calendar (URL says Calendar)

### HR Employee Portal Components

HR Employee Portal Content	SharePoint Name (Site Contents)
Portal tiles (Promoted Links)	Employee Portal Promoted Links
New HR Service Request	Service Request
Update My HR Information	Employee Info Update (URL says Employee Change Requests)
Email My HR Confidential	Email Employee Data
Benefit Plans	Benefit Plans
Knowledgebase	Knowledgebase
Document Center	Document Center
My Service Requests	Service Request
My HR Info Updates	Employee Info Update
My Certifications	Certifications
My Benefits	Benefits
My HR Documents	Employee Documents
Announcements	Announcements
HR Events Events	HR Events Calendar (URL says Calendar)

### HR Manager Portal Components

HR Manager Portal Content	SharePoint Name (Site Contents)
Portal tiles (Promoted Links)	Manager Portal Promoted Links
Submit Employee Change Request	Manager Employee Change Request
My Employees	Employee List
Email Employee HR Information	Email Employee Data Mgr

Knowledgebase	Knowledgebase
Document Center	Document Center
Announcements	Announcements
HR Events	HR Events Calendar (URL says Calendar)
Requested Employee Info Changes	Manager Employee Change Request
Awaiting My Approval	Manager Employee Change Request
My Employee Certifications	Certifications

## Staff Portal Components

### Staff Portal Pages

Core Pages	SharePoint Name (Site Contents)
HR Portal Home	Home
Staff Portal Home	Staff Portal
Employee Portal Home	Employee Portal
Supporting Pages	
Service Request List	Service Requests
Employee Record Management	Employee Record Management
HR Reports	reports
Application Administration	Application Administration
Portal Administration	Portal Administration
Install and Support Administration	Install and Support
Portal Content	Content Management
HR Dashboard	Power BI Pages for HR Portal

### Staff Portal Lists and Libraries

Core Lists	SharePoint Name (Site Contents)
Service Requests	Service Request
Non-confidential Employee List	Employee List
Confidential Employee List	Employees Confidential
Supporting Lists and Libraries	SharePoint Name (Site Contents)
Employee Documents	Employee Documents
Manager Employee Change Requests	Manager Employee Change Request
Employee Info Change Requests	Employee Info Update (URL says Employee Change Requests)
Benefit Plans	Benefit Plans
Employee Benefits List	Benefits
Employee Certifications	Certifications
Staff Announcements	Staff Announcements
Knowledgebase	Knowledgebase
General Team Resource List and Libraries	SharePoint Name (Site Contents)

Staff Tasks	Tasks
Staff Documents	Shared Documents
Staff Calendar	HR Staff Calendar
Staff Links	Staff Links
<b>Reference/Lookup Libraries</b>	<b>SharePoint Name (Site Contents)</b>
Request Category	Request Category
<u>Note:</u> Request Category has a field for who to notify upon ticket creation if that category is selected.	
<b>Admin Libraries</b>	<b>SharePoint Name (Site Contents)</b>
Staff Home page tiles	Staff Portal Promoted Links (URL says StaffPromotedLinks)
Site Images	Images (under Site Assets)
Team Links <u>Note:</u> If SharePoint On-Premise is being used, this Team Links section will be removed during installation.	Team Links

## Workflow

For on-premise installations, all workflows are created using standard SharePoint 2010 or 2013 workflows. They can be seen in SharePoint Designer.

Infowise Smart Alerts are used for Office 365. Generally, most of the workflows in the SP HR Portal application are related to email notifications on Service Request Status and employee data info updates.

### Service Request Management

Object	Type	Trigger	Action Description	Action Type
<b>Service Requests</b>	SP List	Email sent to defined online exchange Shared Email	Request is created Requestor = email sender Request Title = email subject Request Description = email body	Infowise Import
		Request is created in app Status = "1. Unassigned" or category changed	Email Category Owner based on Category chosen	Infowise Alert
			Email Requestor, Request is submitted	Infowise Alert
		Request is assigned or reassigned Status = "2. Assigned To"	Email Assigned To	Infowise Alert
			Email Requestor, Request is assigned	Infowise Alert
		Request is closed Status = "4. Closed"	Email Requestor, Request is closed	Infowise Alert

### News/Announcements/Events: Publish to Intranet

This business automation applies if your company is using the SP Intranet product also.

Object	Type	Trigger	Action Description	Action Type
<b>News Announcements Events</b>	SP List	HR Staff checks the <b>Publish to Portal</b> checkbox for (N/A/E) item	(N/A/E) item is copied to related Intranet SP list, <b>Publish to Portal</b> checkbox is unchecked on Intranet item	Infowise Action

Employee Data Management

Object	Type	Trigger	Action Description	Action Type
<b>Employee Requests their Confidential Information</b>		New Employee Request Created	Confidential Employee Information emailed to Employee	Infowise Alert
<b>Employee Record Updated</b>	SP List	Data field updated for employee (either non-confidential or confidential)	Corresponding data field in Employee List or Employees Confidential lists updated in whichever HR applications are being used: HR Hiring HR Onboarding HR Reviews HR Policy Mgt	Infowise Action
<b>Employee Record Added</b>	SP List	New employee record added in Employee List	New record added in Employees Confidential list	Infowise Action
			New record added for employee in the Employee List and Employees Confidential lists in whichever HR applications are being used: HR Hiring HR Onboarding HR Reviews HR Policy Mgt	Infowise Action
<b>Manager Submits Employee Status Change</b>	SP List	<b>Request Submitted</b>  And Approver field filled in	Internal use fields set to allow actions to work	SharePoint Workflow

		<b>Approver Approves Request</b>  Approval Status field changed from Pending to Approved	Employee fields updated in Employee List and Employees Confidential	Infowise Actions
		<b>Approver Rejects Request</b>  Approval Status field changed from Pending to Rejected		

## Appendix

### Document Change Log

Date	Description