d.velop connect for Microsoft SharePoint: Administrator

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1. d.velop connect for Microsoft SharePoint: Administrator

1.1. Basic information on the application

This chapter contains general product information and conventions regarding documentation.

1.1.1. About d.velop connect for Microsoft SharePoint

With this adapter, you can connect your principal system or your principle application with your Microsoft SharePoint installation.

Once it has been completely integrated in that manner, you can store all documents directly from your ERP software to your Microsoft SharePoint instance, for example. You can use this adapter to create an acceptance point for integration interfaces on the d.velop platform. Implementation partners offer suitable integrations, such as in Microsoft Dynamics Business Central (BC), Finance and Operations (FO), Sales (CE) or Salesforce. You can also make information available to employees without ERP access at one main location and add ecspand to your primary system so you can structure business processes individually and digitally.

And the documents and information are archived in an audit-proof manner along the way. This adapter also contains the Microsoft SharePoint provider for d.velop enterprise search.

1.2. Installing and uninstalling

In this chapter, you can find information about installing d.velop connect for Microsoft SharePoint.

1.2.1. System requirements

d.velop connect for Microsoft SharePoint is provided as an app in the d.velop platform.

System

Microsoft SharePoint in Microsoft 365

Web browser

The following web browsers are supported:

- Mozilla Firefox
- Google Chrome
- Microsoft Edge (based on Chromium)
- Safari

d.velop tests its products with current web browser versions and strives to maintain compatibility for at least twelve months. d.velop usually resolves incompatibilities in new web browser versions promptly.

The web browser used must be able to process the **text/javascript** content type.

1.2.2. Installing d.velop connect for Microsoft SharePoint

You want to install d.velop connect for Microsoft SharePoint on your system. In this chapter, you'll get the necessary information on how to do it.

This is how it works

1. Click on the feature **Subscribe App** on the start screen of your d.velop cloud tenant.

2. Search for **d.velop connect for Microsoft SharePoint** and click on the entry.
3. Click on the **Book now** button.
4. Follow the setup wizard.
5. Confirm deployment by clicking **Subscribe now**.

You have successfully made d.velop connect for Microsoft SharePoint available in your tenant. The app should now appear as a configuration field in the **Configuration** feature of your tenant.

1.2.3. Uninstalling d.velop connect for Microsoft SharePoint

You want to remove an app in your d.velop cloud tenant.

This is how it works

1. Click the **d.velop cloud management** feature on the start page of your d.velop cloud instance.
2. Select the organization with the tenant from which you want to remove the app.
3. Select the correct tenant and click on **Edit tenant**.
4. Find the app you want to remove and click on **Cancel app**.
5. Confirm the cancellation.

1.3. Configuring d.velop connect for Microsoft SharePoint

In this chapter, you'll find more information about the settings and configuration options.

1.3.1. Connecting your SharePoint environment to the d.velop cloud platform

You can register a Microsoft SharePoint Online instance as a repository and use it in your d.velop environment.

Requirements

- You are registered at d.velop cloud and have created an organization and a tenant there.
- You have subscribed to the App d.velop connect for Microsoft SharePoint with your cloud tenant.

The first configuration step is to create an app registry within your Microsoft Entra tenant.

This is how it works

1. Go to the portal of the **Microsoft Entra admin center** of your Microsoft Entra tenant and log in with a user with administration rights.
2. Go to **Identity > Applications > App registrations**.
3. Choose **New registration** to create a new app.
4. Enter a descriptive name (e.g. "d.velop SharePoint Adapter").
5. Select the supported account type **Accounts in any organizational directory - Multitenant**.
6. In the **Redirect URI** area, select the type **Web** and enter your URI as per the following example: https://<d.velop base address>/sharepointadapter/oauth2/token.
7. Finish the creation by clicking on **Register**.
8. Open the app you just created and go to **API permissions**.
9. For a document archiving scenario, add the following delegated permissions from **Microsoft APIs**:
   - **AllSites.Read**
   - **AllSites.Write**
   - **MyFiles.Read**
   - **MyFiles.Write**
   - **Sites.Search.All**
   - **TermStore.Read.All**
   - **TermStore.ReadWrite.All**
   - **User.Read.All**

10. For a search only scenario with d.velop enterprise search, add the following delegated permissions from **Microsoft APIs**:
    - **AllSites.Read**
    - **User.Read.All**
    - **MyFiles.Read**
    - **Sites.Search.All**
11. Go to the **Certificates & secrets** area in your app.
12. Create a new client secret in the **Client secret** section.
13. Enter a descriptive name (e.g. “SharePoint-Client-Secret”).
14. Enter an expiration date.
15. Note the key for the next configuration step. You will not be able to view the key afterwards.
16. Then, on the API permissions overview page, grant the administration consent.

You have now successfully created an app registration in your Microsoft Entra tenant that can be used for the further configuration steps.

Next, establish the connection from the d.velop platform to your SharePoint.

This is how it works

1. Open your d.velop cloud client and switch to the **Configuration > Integrations and Interfaces > Microsoft SharePoint > Connection Data** section.
2. Click the plus sign to open the **Add connection data** dialog box and create a Microsoft SharePoint connection.
3. Enter a descriptive name.
4. Enter the directory ID (client) and application ID (client) of the app registry you just created. You can find the values on the app overview page.
5. Enter the client secret generated from the app registration in the Microsoft Entra admin center.
6. Specify the endpoint for your Microsoft SharePoint instance.
7. If the Microsoft SharePoint endpoint is a repository managed by d.velop for Microsoft 365, optionally enable **Show search results in d.velop center** to see search results directly in d.velop center.
8. Click **Add and validate**. The data you entered is now checked. If the data was entered successfully, a dialog box for entering two users opens.
9. Click **Store user**.
10. Select a site collection administrator. You will find more information about this user at the end of this chapter.
11. Enter your individual user, which is specified for you personally as the end user, in order to be able to check your authorizations, among other things, during a search.

You have successfully set up a Microsoft SharePoint online connection.

> **Note**
> To change the selected user account afterwards, call the following URL manually: https://<baseaddress>/sharepointadapter/oauth2/login?repoids=<RepositoryID>

> **Note**
>
> **Site collection administrator**
>
> This user must be able to read lists, libraries, ContentTypes and columns, among other things. Depending on the scenario, documents may also have to be uploaded or changed. This user is then used by all the administrators to configure the adapters that communicate with Microsoft SharePoint.
>
> During the initial configuration, the Microsoft Entra admin center may report that an admin consent must be granted. During the initial configuration, enter a user who is allowed to perform this admin consent in Microsoft Entra admin center. If a correct user is entered, the required Admin Consent dialog automatically appears. The access of the d.velop app is allowed for the Microsoft Entra application. Then you can enter and use the site collection administrator.

1.3.2. Adjusting a registered SharePoint connection

It is possible to adjust a Microsoft SharePoint connection that has already been created.

Please check whether other configurations, such as Microsoft SharePoint mapping, are dependent on this configuration.

This is how it works

1. Click the **Configuration** tile on the start page.
2. Go to **Settings for Microsoft SharePoint > Connection data**.
3. Click on the pen icon next to an entry.

You can now adjust the creation of your Microsoft SharePoint connection.

1.3.3. Setting up mapping

Fields from the delivering source system often have different names than the fields you use in your Microsoft SharePoint instance. That's why it's possible to assign fields from documents to target fields in your Microsoft SharePoint instance and to define a specific target library for the storage of a specific document type.

Ensure that you include all the required target library fields in your Microsoft SharePoint instance during mapping. You can see the required fields in the library settings for the target library in your Microsoft SharePoint instance.

This is how it works – creating mapping

1. Click the **Configuration** tile on the start page.
2. Go to **Integrations and interfaces > Microsoft SharePoint > Mappings**.
3. Select your Microsoft SharePoint connection.
4. Click the plus sign to apply new mapping in the selected SharePoint connection.
5. Give the mapping a descriptive name.
6. Select a source system and a source category. The source category is the document class with which the document is passed to the adapter. With the source category, you can specify how the adapter should behave when storing in Microsoft SharePoint.
7. Select the Microsoft SharePoint site collection in which you want to store this document type.
8. Select a Microsoft SharePoint site in which this document type should be stored.
9. Select a library in the selected site.
10. Select the content type with which a document should be stored. At the same time you can determine which fields are available for mapping.

11. Now add a new field in the **Properties** area by clicking the **Add** field.
12. Now select fields from the source. Assign the fields from the source system to fields in the target system.
13. You can use **Add new field** to add new fields, and you can remove them again with the trash can icon.

As an alternative to steps 7 - 9, you can perform a manual specification of the storage path in expert mode. This also enables storage in subfolders of a library in Microsoft SharePoint and the use of placeholders for the configuration of dynamic storage paths.

This is how it works – without placeholders

1. Perform steps 1 to 6 of the instructions for creating mapping.
2. Enable the **Expert mode** option in the **Categories** section. The interface switches to a modified view.
3. Specify a storage path that is located within your Microsoft SharePoint instance. You can find more detailed information about the structure of paths later in this chapter.
   The path is validated after a short input pause. You will get a feedback if the path could be found in your Microsoft SharePoint instance.
4. Continue with step 10 of the instructions for creating mapping.

Note

Structure of paths

Entry type	Structure
Example structure 1: Library	/sites/<site>/<library>
Example structure 2: Library	/sites/<site>/<subsite>/<library>
Example structure 3: Folder	/sites/<site>/<library>/<folder path>
Example structure 4: Folder	/sites/<site>/<subsite>/<library>/<folder path>
Example structure 5: List	/sites/<site>/Lists/<list>
Example structure 6: List	/sites/<site>/<subsite>/Lists/<list>

This is how it works – with placeholders

1. Perform steps 1 to 6 of the instructions for creating mapping.
2. Enable the **Expert mode** option in the **Categories** section. The interface switches to a modified view.
3. Enable the **With placeholders** option. The view then changes.
4. Specify a storage path that is located within your Microsoft SharePoint instance. You can use placeholders at any point in the path. Placeholders enable you to use dynamic values as parts of the storage path. You can find more information about placeholders, their structure and the integration of placeholders into the storage path later in this chapter.
5. To validate the entered path, click **Validate the path**. Another dialog box opens.
6. Fill all the text fields for the entered placeholders with sample values. The placeholders are then replaced with the entered values in the **Resolved storage path** display field. Ensure that the path displayed in the **Resolved storage path** field is an existing path in your Microsoft SharePoint instance.
7. Click **Validate**. After a number of seconds, validation is complete and the result is displayed in the dialog box.
8. If the entered values result in a valid storage path, click **Apply**. The dialog box closes. If the entered values do not result in a valid storage path, please check your entries and repeat the two previous steps.
9. Continue with step 10 of the instructions for creating mapping.

You have now successfully assigned a document type from a source system, e.g. Microsoft Dynamics 365, to a content type in a library in your Microsoft SharePoint instance, and specified which metadata is to be written in which field.

Note

Information about placeholders

You can define placeholders in the following format: ${item.<fieldID>}

When you enter a placeholder, a list with all the available values for <fieldID> appears after you enter the first part of the placeholder (${item.). The list is filtered according to your entry. For <fieldID>, you can generally enter all the values that are part of the selected source category. If you enter a different value that is not displayed in this list, an error occurs during storage.

Sample paths with placeholders

Entry type	Structure
Example structure 1: Site as placeholder	/sites/${item.<fieldID>}/<library>
Example structure 2: Subsite as placeholder	/sites/<site>/${item.<fieldID>}/<library>
Example structure 3: Library as placeholder	/sites/<site>/${item.<fieldID>}
Example structure 4: Folder with placeholder	/sites/<site>/<library>/${item.<fieldID1>}/${item.<fieldID2>}
Example structure 5: List as placeholder	/sites/<site>/Lists/${item.<fieldID>}

Warning

In the mapping, you can map the **Name** field, which maps the physical file names, to Microsoft SharePoint pages. Values in this field must exist only once in a library. If you are assigning a property to the **Name** field, ensure that you always use unique values. Otherwise, conflicts occur that result in an error message.

1.3.4. Adjusting mapping

It is possible to adjust mapping which has already been created.

Where applicable, ensure that you take in account all the required fields of the target library in your Microsoft SharePoint instance required for storage when mapping. You can see the required fields in the library settings for the target library in your Microsoft SharePoint instance.

This is how it works

1. Click the **Configuration** tile on the start page.
2. Go to **Settings for Microsoft SharePoint > Mappings.**
3. Select a Microsoft SharePoint connection that has been registered before.
4. Click on the mapping you want to adjust.
5. You can assign the available fields differently.
6. If you want to change the content types or the library, delete all the fields relating to the content types or the library.
7. You can only adjust the **Source system** section if you have deleted existing mapping of a category.

You have now successfully assigned a document type from a source system, e.g. Microsoft Dynamics 365, to a content type in a library in your Microsoft SharePoint instance, and specified which metadata is to be written in which field.

1.3.5. Exporting mappings

You can export one or all of the Microsoft SharePoint mappings that have already been created for a data connection.

This is how it works

1. Click **Configuration** on the start page.
2. Go to **Settings for Microsoft SharePoint > Mappings**.
3. Select the data connection from which you want to export one or all the mappings.
   a. For one mapping: Click the three dots next to the mapping and then click **Download mapping**.
   b. For all mappings: In the row for selecting the data connection, click the three dots and then click **Download mappings**.

During the export, you receive a JSON file. You can import the JSON file again in another data connection.

1.3.6. Importing mappings

You can import one or more Microsoft SharePoint mappings to a data connection.

This is how it works

1. Click **Configuration** on the start page.
2. Go to **Settings for Microsoft SharePoint > Mappings**.
3. Select the data connection to which you want to import the mappings.
   a. For one mapping: In the row for selecting the data connection, click the three dots and then click **Add a mapping**.
   b. For multiple mappings: In the row for selecting the data connection, click the three dots and then click **Overwrite mappings**.
4. Select the relevant JSON file in the dialog.

When you import multiple mappings, existing mappings are overwritten.

If you select a JSON file that contains only one mapping while importing multiple mappings, an error occurs. An error also occurs if you select a JSON file that contains multiple mappings while importing one mapping.

1.3.7. Deleting mapping

It is possible to delete existing mapping.

This is how it works

1. Click the **Configuration** tile on the start page.
2. Go to **Settings for Microsoft SharePoint > Mappings.**
3. Click on the rubbish bin icon next to the mapping you want to delete.

You have now successfully deleted an existing mapping.

1.3.8. Deleting a SharePoint connection

It is possible to remove a Microsoft SharePoint connection that has already been created.

Please check whether other configurations, such as Microsoft SharePoint mapping, are dependent on this configuration.

This is how it works

1. Click the **Configuration** tile on the start page.
2. Go to **Settings for Microsoft SharePoint > Connection data**.
3. Click on the trash can icon to remove an entry.

You have successfully deleted the registration for your Microsoft SharePoint connection.

1.3.9. Manually importing scanned or local documents

You can import documents manually in Microsoft SharePoint with d.velop inbound scan.

The d.velop connect for Microsoft SharePoint app connects to d.velop inbound scan and Microsoft SharePoint is then available as a target system in d.velop inbound scan. You can define any repository, SharePoint site collection and content type.

You must create the repositories beforehand in the configuration of d.velop connect for Microsoft SharePoint.

1.3.10. Allowing SharePoint items to be updated by name

When using d.velop connect for Microsoft SharePoint, you can set a SharePoint item to be updated if an item with an identical name exists in SharePoint. The update does not have to be explicitly called.

With the default settings, saving would fail because a SharePoint item with the same name already exists. This differing behavior may be useful if you do not know whether the SharePoint item already exists when you save, and an explicit update therefore cannot be performed. The following configuration lets you update a SharePoint item while saving it if an item with the same name already exists in SharePoint.

You configure the feature in d.velop connect for Microsoft SharePoint.

This is how it works

1. Open your d.velop cloud client and switch to the **Configuration > Integrations and Interfaces > Microsoft SharePoint > Connection Data** section.
2. Open the connection for which you want to enable the behavior.
3. Enable the function **Allow SharePoint items to be updated by name**.
4. Then click **Save**.

To ensure you can update the item by name, use the name in the applicable mapping and enter it while saving. You set the configuration of a mapping as follows:

This is how it works

1. Open your d.velop cloud tenant and go to the area **Configuration > Integrations and Interfaces > Microsoft SharePoint > Mappings**.
2. Open the mapping for which you want to enable the behavior.
3. Below that, select the **Name** destination field under **Properties** and map it to a source field.
4. Then click **Save**.

You have now allowed SharePoint items to be updated by name for a mapping.

1.3.11. Configuring the import include list

If you are using d.velop connect for Microsoft SharePoint, you can configure an include list for the import to SharePoint. In this list, you can enter all the source URLs from which documents are permitted to be created via d.velop connect for Microsoft SharePoint in your SharePoint repository.

This is how it works

1. Open your d.velop cloud tenant and switch to the area **Configuration > Integrations and Interfaces > Microsoft SharePoint > Import configuration**.
2. Click **Add URL** to add a new entry.
3. Enter your desired source URL, in the format: **https://hostname/**
4. Save your changes.

You have successfully added a source URL to the import include list.

1.3.12. Allowing the deletion of SharePoint items

When using d.velop connect for Microsoft SharePoint, you can allow the deletion of SharePoint items.

You configure the feature in d.velop connect for Microsoft SharePoint.

This is how it works

1. Open your d.velop cloud client and switch to the **Configuration > Integrations and Interfaces > Microsoft SharePoint > Connection Data** section.
2. Open the connection for which you want to enable or disable the setting.
3. Enable the feature **Allow the deletion of SharePoint items**.
4. Then click **Save**.

You have now successfully activated the deletion of SharePoint items.

1.3.13. Allow overwriting existing SharePoint items when moving

Moving a SharePoint item may result in an inconsistent state due to a processing interruption. In this case, both the source item and the target item exist in SharePoint. It is not possible to move the item again because the target item already exists. To move the item anyway, you can allow an existing SharePoint item to be overwritten.

This is how it works

1. Open your d.velop cloud client and switch to **Configuration > Integrations and interfaces > Microsoft SharePoint > Connection data**.
2. Open the connection for which you want to allow overwriting.
3. Enable **Allow overwriting existing SharePoint items when moving**.
4. Click **Save**.

1.4. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at https://dvelopacademy.keelearning.de/.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: https://kb.d-velop.de/

Find the central imprint at https://www.d-velop.com/imprint.