



SharePoint Integration
Summer 18

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SharePoint Integration


Simplr is proud to announce a highly anticipated integration with SharePoint. Simplr will now be able to unlock documents and files stored in SharePoint and make them easy to find, share, and work with for everyone within your organization. The SharePoint integration will augment our existing file sharing integrations to help employees search, update, and share files ubiquitously.

Setup

Remote Site Settings

Prior to connecting to SharePoint through Simplr a System Admin must update the Remote Site Settings.

Go to **Salesforce > Setup > Installed Packages > Simplr > Post Install Instruction**

Package Details Help for this Page 

Simplr (Managed)

[Back to List: Installed Package](#)

Installed Package Detail [Uninstall](#) [View Components](#) [Manage Licenses](#) [Become Primary Contact](#) [View Dependencies](#)

Package Name	Simplr	Version Number	1.233.7
Language	English	First Installed Version Number	1.232.1
Version Name	Spring 2018, v1.233.7	Package Type	Managed
Namespace Prefix	Simplr	Allowed Licenses	5,000
Publisher	Simplr Inc.	Used Licenses	2,018
Status	Active	Modified By	Simplr, 4/13/2018 7:38 PM
Expiration Date	12/30/2018		
Description	Simplr release package.		
Post Install Instructions	View		
Installed By	Ashish Narang, 3/30/2018 2:42 AM		

Count Towards Limits

Apps	1	Tabs	2
		Objects	78

This will take you to the Post Install Setup Pages.

Microsoft Integration (Active Directory / SharePoint / OneDrive)

1. Click here to add following URL to Remote Site Settings, if it is not done already.

Remote Site Name - MICROSOFT_LOGIN

Remote Site URL - https://login.microsoftonline.com

Disable Protocol Security - Unchecked

Description - Used to Authenticate Microsoft APIs

Active - Checked

2. Click here to add following URL to Remote Site Settings, if it is not done already.

Remote Site Name - MICROSOFT_GRAPH

Remote Site URL - https://graph.microsoft.com

Disable Protocol Security - Unchecked

Description - Used for Microsoft Integration

Active - Checked

3. Click here to add following URL to Remote Site Settings, if it is not done already.

Remote Site Name - Microsoft_Teams_API

Remote Site URL - https://outlook.office.com

Disable Protocol Security - Unchecked

Description - Used to push site/content Feeds to mapped Microsoft Teams channels

Active - Checked

In the Microsoft Integration section select 'Click here' for point 1 and then 'Save' on the Remote Site Edit form. Then do the same for the other points.

Connecting the App

To integrate SharePoint firstly the App Manager must connect their service account to Simpplr on an App Level. This can be done by going to **Manage Application > Integrations**.

Manage Application

Setup Defaults People Segments **Integrations** Resets

Integrations

Please email support@simpplr.com (providing your Home Dashboard URL) to request the Client ID & Client Secrets for all of the integrations that you intend to enable.

- Active Directory
- Box
- Dropbox
- Embed.ly
- Google Analytics
- Google Drive
- Microsoft Teams
- OKTA
- OneDrive
- One Login
- SharePoint

SharePoint Client ID *

Please fill out this field

SharePoint Client Secret *

Please fill out this field

The App Manager must enter our SharePoint App ID and Secret. Please contact our Support team by emailing support@simpplr.com to request our Client ID and Secret, please provide your Home Dashboard URL in the email.

User Setup

Each individual user needs to connect to their SharePoint account to start using the integration. This can be done by going to **My Settings > External Apps**.



My Settings

[View Profile](#)

[Profile](#)

[Notifications](#)

[External Apps](#)

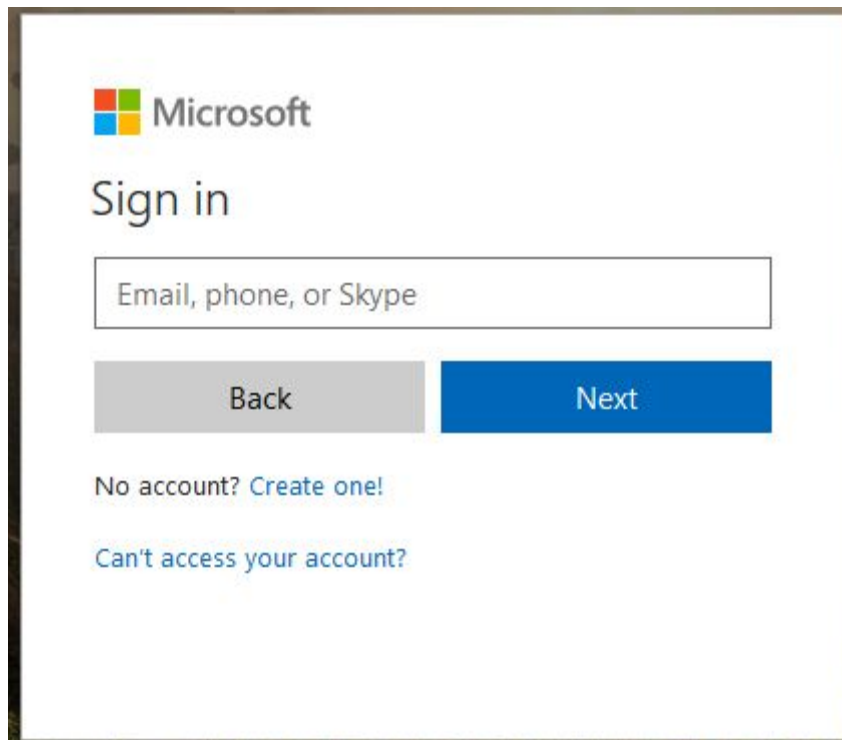
External Apps



SharePoint
Connected as Ashish Narang

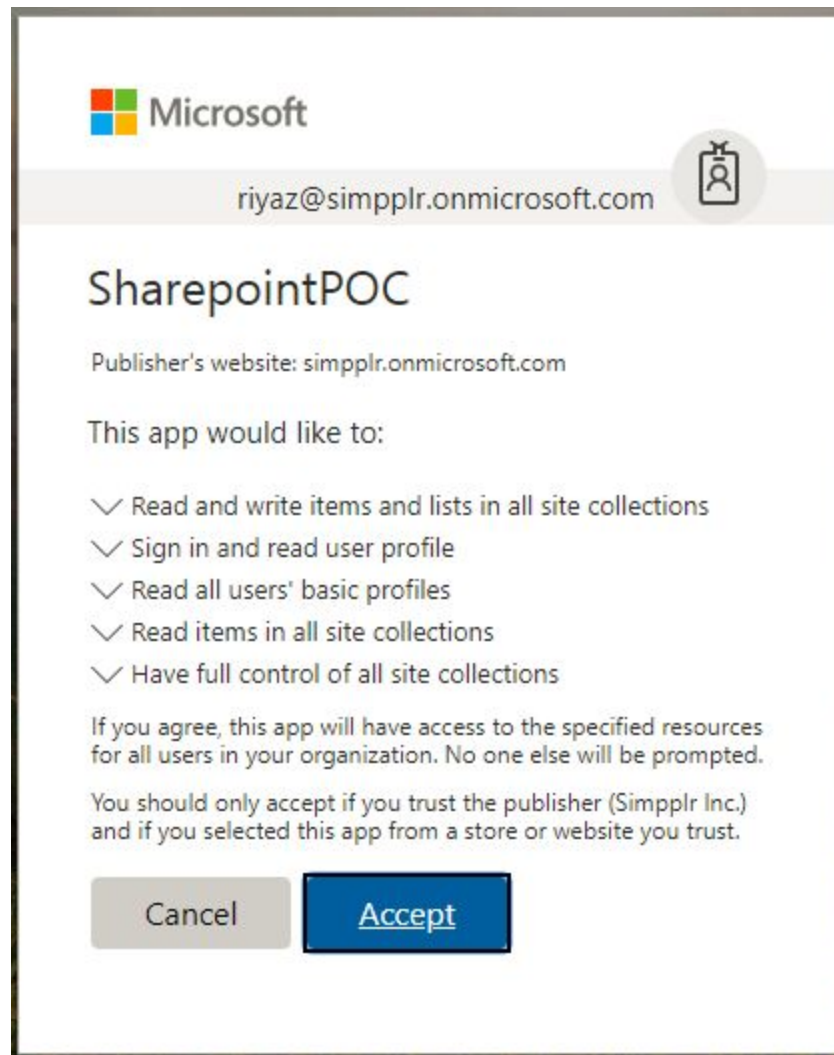
[Disconnect account](#)

User Login



The image shows a Microsoft sign-in interface. At the top left is the Microsoft logo. Below it, the text "Sign in" is displayed. A text input field contains the placeholder text "Email, phone, or Skype". Below the input field are two buttons: a grey "Back" button and a blue "Next" button. At the bottom, there are two links: "No account? Create one!" and "Can't access your account?".

User Consent



Site Storage

The Storage can be set at the site level by the Site Owner; it's necessary that they have already connected their Onedrive account to see this storage choice as an option.

- Once the Site Owner connects to SharePoint, they will have the choice to connect each individual Site that they own to SharePoint by going to **Manage Site > Storage** and

selecting SharePoint.

- The Site Owner and Manager(s) will have the option to link existing Folders to the Site
- SharePoint Folders/Files can then be added to that Site based on the permission levels in SharePoint.
 - Irrespective of whether it is a public or private site, the access is based on the access the user has in SharePoint.

Site Root Folder

- For all Sites we allow linking Folders from existing SharePoint Folders. The access of the Folder controls the members access
 - Folders/Files can be uploaded to the Site Root Folder
 - You cannot move Folders/Files from any non SharePoint Folder to the Site Root Folder
 - You can add new Folders to the Site Root Folder and Subfolders based on your permissions
 - You can move Files from the Site Root Folder into Subfolders
 - You cannot move Files from other System Folders into the Site Root Folder
-

Favorite Files Syncing

- It is not possible to Favorite Files/Folders from SharePoint drive.
-

File Operations

New folder

- Members with Write access to the Document Library that is linked to the Site can add new Folders

Linking Folders

- You can Link SharePoint Folders to Sites within the Intranet

Moving Files

- It is possible to move Files between SharePoint subfolders of the same Root Folder only
- It is not possible to move Files from non SharePoint Folders to SharePoint Folders and vice versa.
- Due to limitations in Microsoft's API, there will not be a Move option for SharePoint files shown in the Search Files listing

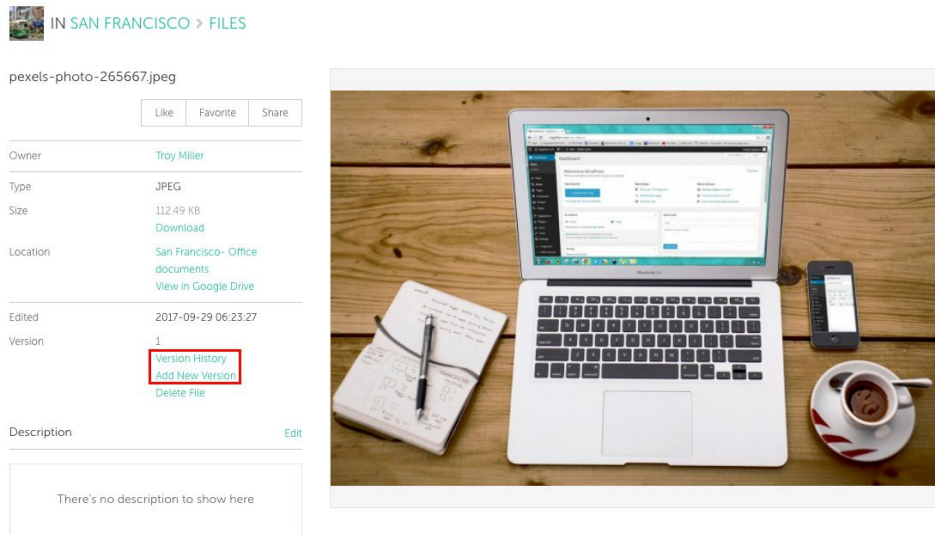
Uploading Files

- Members with Write access to the linked Folder can upload new Files.

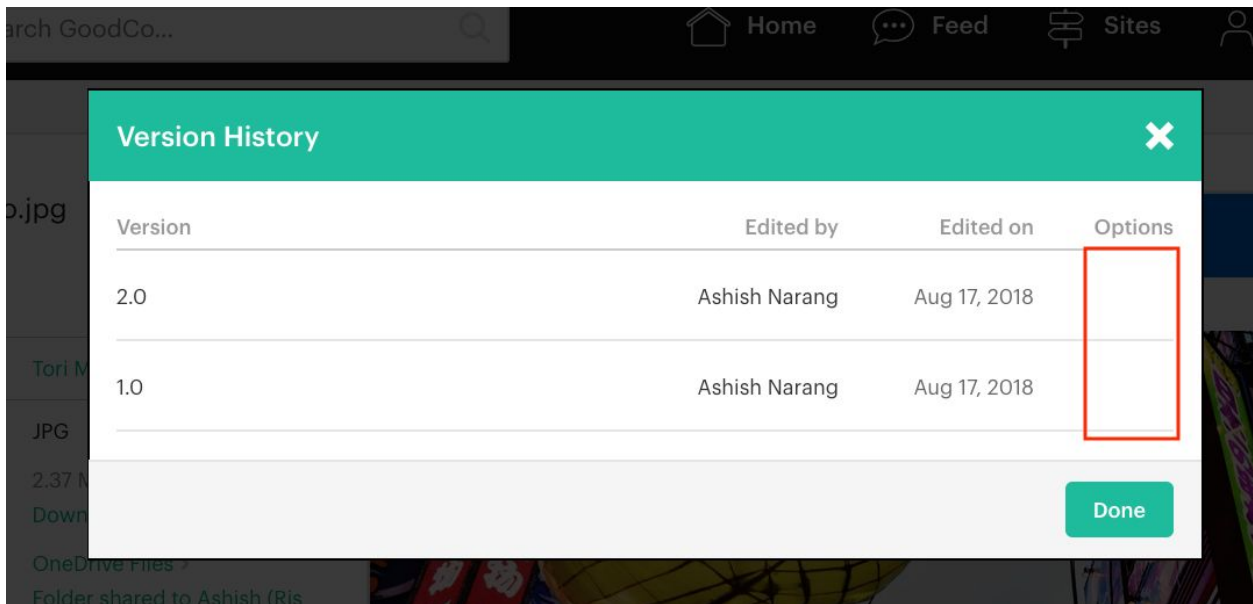
New Versions of Files

- If a folder is set to Read/Write then all members (including Site Owners/Managers) of a Site can create new versions. If a folder is set to Read, only Site Owners/Managers can make new versions

- If a user makes a new version of a File they do not take on ownership of that File, and the File remains within the Site Root Folder.



Important note: Due to the limitations in Microsoft's API, the 'Download' option will **not** be available under Options in the SharePoint version history modal:



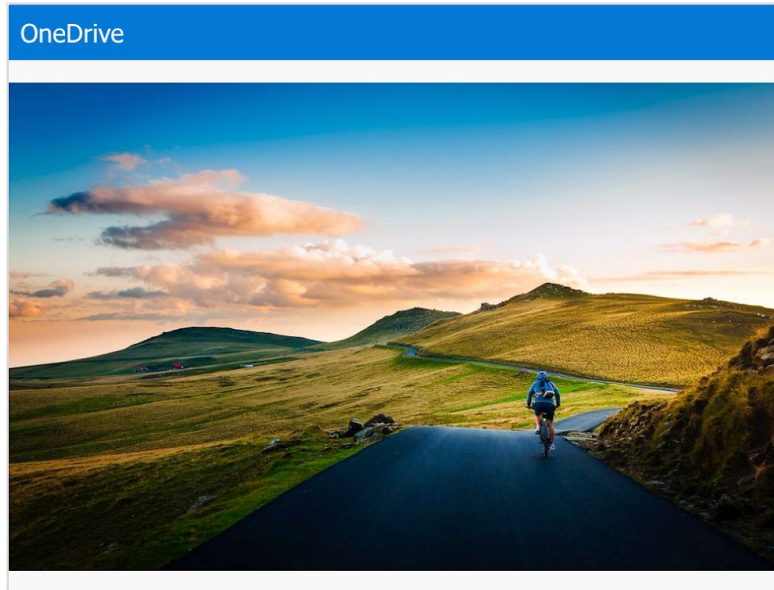
Sharing Files

- SharePoint Files can be shared into the Feed from the File Detail page. SharePoint Files from Public Sites can be shared with all users and on all Sites. SharePoint Files from Private Sites can only be shared into the Feed of that Site.

bicycle-cloud-clouds-258045.jpg

Like **Share**

Owner	Tori Miller
Type	JPG
Size	563.26 KB Download
Location	SharePoint Files > Documents
Edited	2018-08-10 04:52:49
Version	Version History Add New Version Delete File



Share File



Tori Miller

Copy link to File


B *I* U ~~S~~ ☰ ☷ @ #

What would you like to say about this File?




Share with Followers ▾



Share


 **Tori Miller**
Aug 10, 2018 at 4:58am

Check out this SharePoint File!



Adoption Trend 6 February 2018 10_08_33
.csv - 326 Bytes

 Like  Reply




Read/Write Folders within Site Root Folder

You cannot share a Folder inside a Shared folder. Since the Site Root Folder is already shared, you are not able to share a Read/Write Folder from within the Site Root Folder again with Site Members to edit.

Adding Files to Content

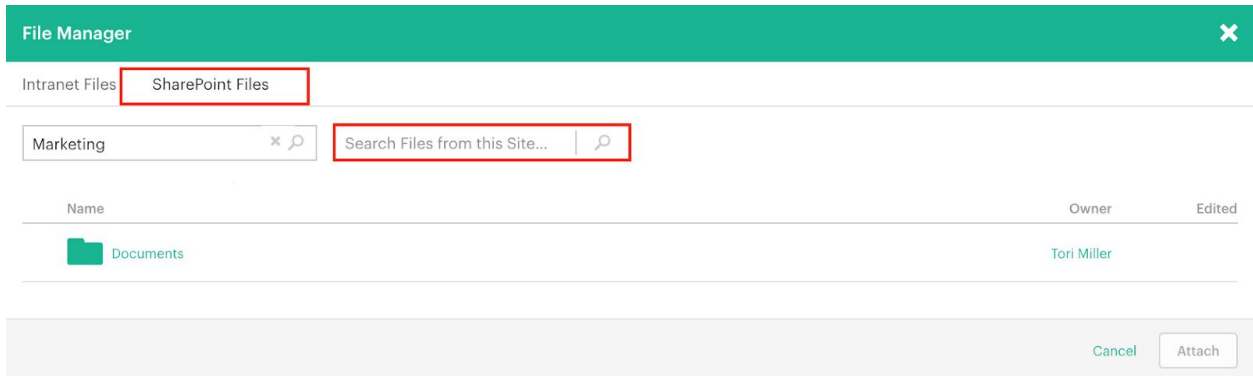
- SharePoint Files can be added to Content if the Site is connected to SharePoint and you have connected to SharePoint. SharePoint Files from Private Sites can only be added to Content within the Private Site.

Files & Attachments

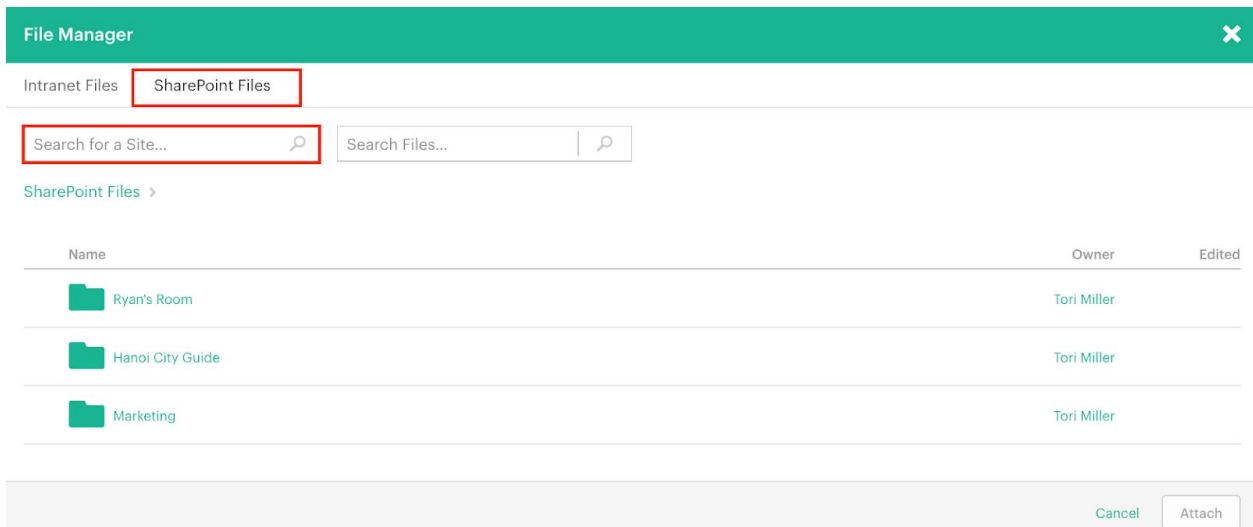


Drop files here or [Select from computer](#)
Browse from [Intranet](#) or [SharePoint](#)

- Adding SharePoint Files to Content is done through the File manager.



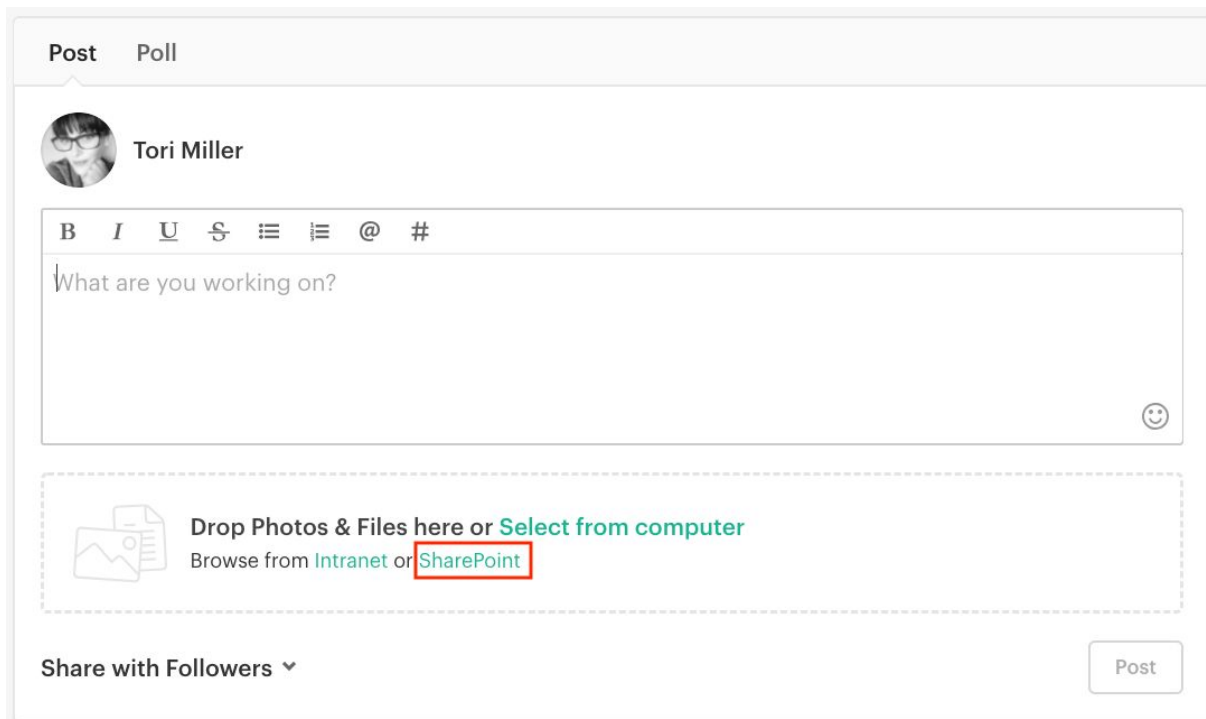
- When adding Files to Content, by default the File Manager will search for Files within the Site that you are adding Content to.
- If you remove the name of the Site from the search box, you will see all of the SharePoint Files that you have access to. This will not include SharePoint Files within Private Sites that you are not a member of.




- You can also search for a specific Site to limit your search to.
- Results can be filtered by 'All', 'This Week', 'Last Week' and 'This Month', and by 'All Owners' or 'Owned by Me'.




Adding Files to Feed Posts

- Any SharePoint Files that you have access to can be added to Feed Posts.
- This is also done through the File Manager.





Post Poll

 Tori Miller

B I U    @ #

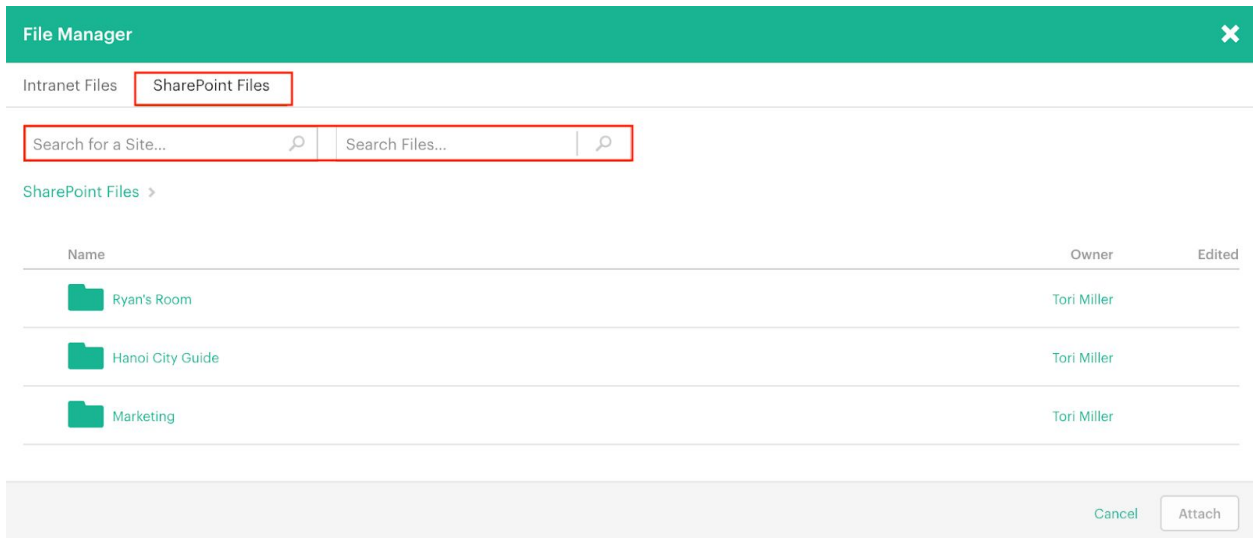
What are you working on?



 Drop Photos & Files here or [Select from computer](#)
Browse from [Intranet](#) or [SharePoint](#)

Share with Followers ▾ Post

- When adding Files on your Home Feed, by default the File Manager will provide a list of all of the Sites that are connected to SharePoint.



- If you search for a specific Site to limit your search to it will then display a list of all of the Folders and Files within that Site.
- If you do a File Search with no Site selected we will search for all SharePoint Files and Folders that you have access to.

Browsing Folders

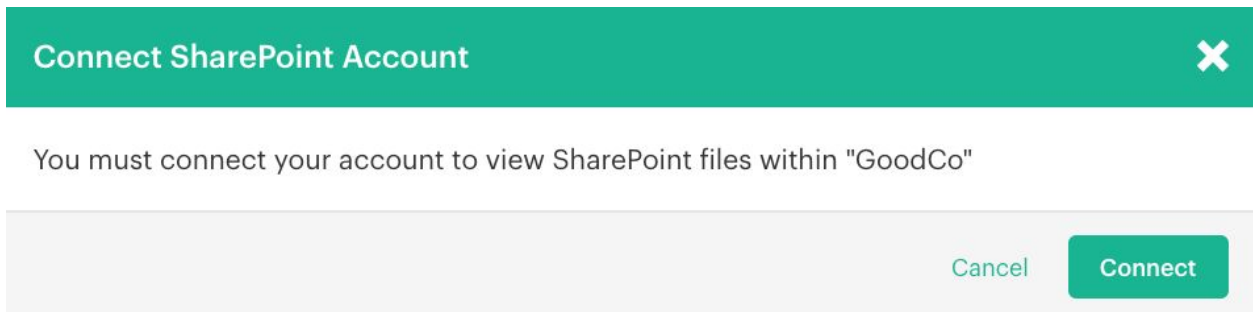
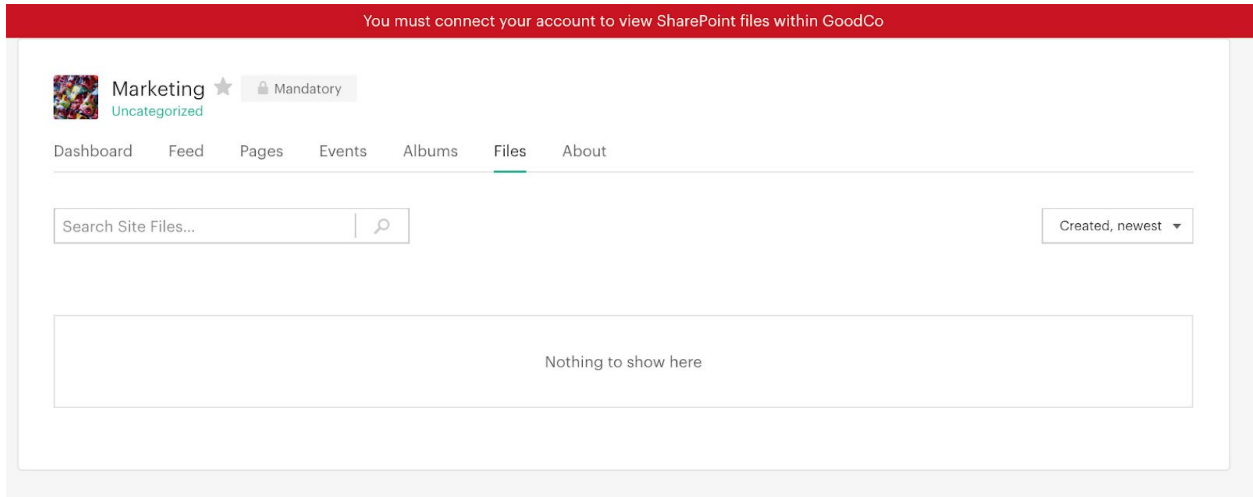
When browsing Files within Simpplr you can only ever see the folder name of the level above the folder/file that you are currently viewing.



Viewing Files

Once you have connected to SharePoint you are able to view your own and any SharePoint Folders/Files that you have access to.

- If you have not connected to SharePoint and try to view a folder/file you will receive a flash message advising you that you must connect to SharePoint before being able to view the folder/file.



Sharepoint Files in Tiles

You can add a File Tile containing Sharepoint Files to a Site Dashboard:

Add Files Tile ✕

Intranet Files SharePoint Files

Display a list of important Files to download from SharePoint

Tile title: *
SharePoint Files

Search for Files to add to Tile... 🔍

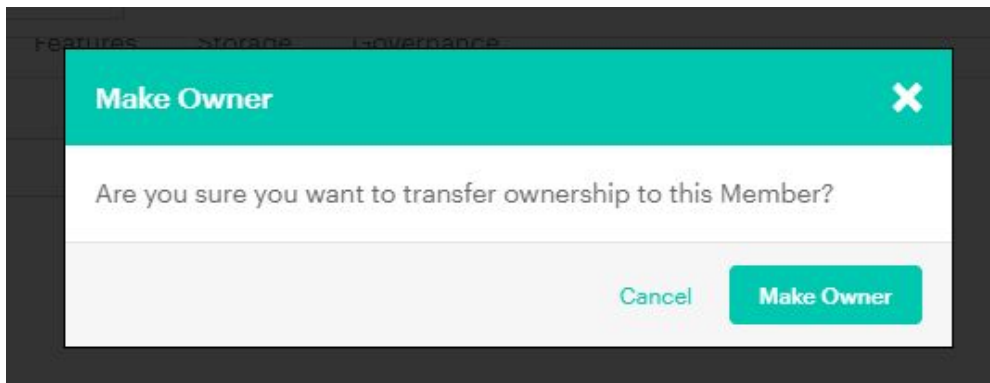
Back Add another Tile Add to Site dashboard

- Only Files within the Document Library associated with that Site will be available
- Please note: you cannot add a File Tile containing Sharepoint Files to the Home Dashboard

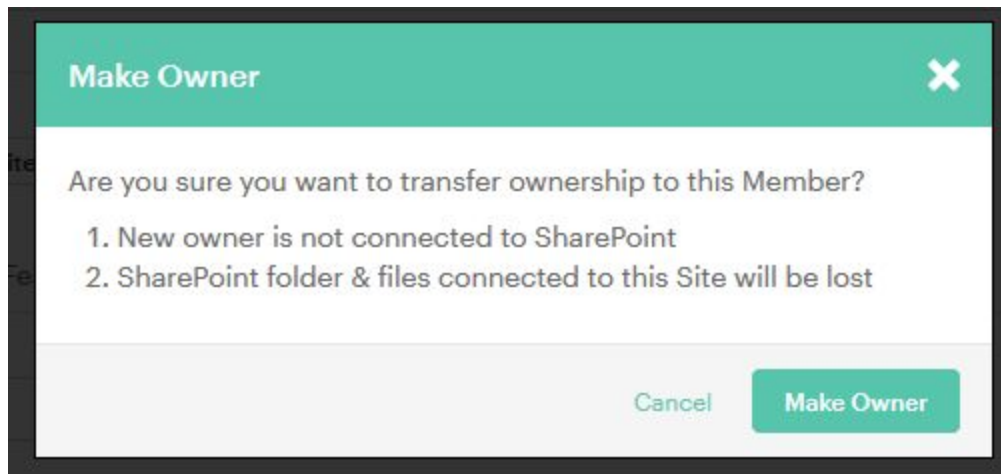
Site Transfer

The Simpplr Site can be transferred to the Site Members in the members tab.

When the owner is connected to SharePoint the below pop-up is shown to the user



When the user is not connected, the below pop-up is shown to the user



Only the site ownership is changed in Simpplr. As the permissions are not dealt with by Simpplr, no changes are made in Sharepoint.



Preview of Files

Please note that due to the limitations of Microsoft's API, we cannot show file preview thumbnails, and will instead show the file extension type for:

- AI, DOC, DOCM, DOCX, EPS, ODP, ODT, PPS, PPSM, PPSX, PPT, PPTM, PPTX, RTF, CSV, ODS, XLS, XLSM, XLSX JPEG, JPG, PNG and PDF Files.
-

Searching

The global search, made from the header search box, will search for all SharePoint Folders/Files that you have access to.

adoption				
Showing results for adoption				
Top SharePoint Files (1) Intranet Files (1) Feed				
Name	Owner	Belongs to	Edited	
 Adoption Trend 6 February 2018 10_08_33.csv	Ashish Narang	Marketing	Jul 15, 2018	

Searching within a Site for SharePoint Files and Folders will return all of the Files and Folders in the connected Document Library

- The options shown in the dropdown menu of the results from a Sharepoint File Search in a Site are always based on the Read Permission.
 - If you have Read/Write Permissions on the File you will be able to access the additional options by clicking on the File to open the File Detail Page.

