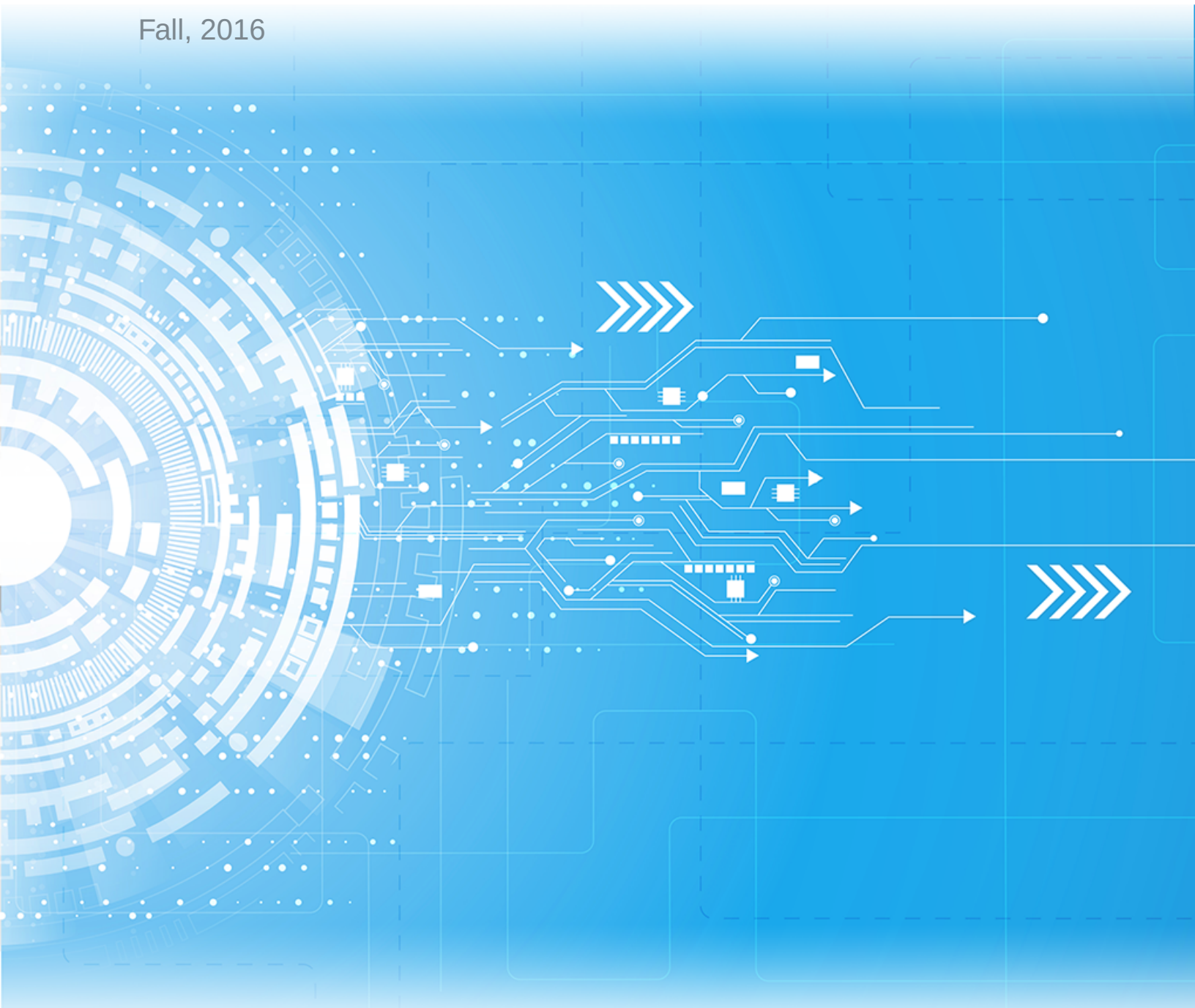
clarizen

# Integrating Clarizen with SharePoint Online

Fall, 2016



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# Contents

**Chapter 1: Overview of the integration with SharePoint Online.....5**

Overview of the integration.....6

**Chapter 2: Integration steps with SharePoint Online.....7**

1. Register Clarizen application with Azure Active Directory.....8
2. Register SharePoint in Clarizen.....11
3. Authenticate user's Clarizen account with SharePoint.....12

Editing integration settings for users.....12

# Chapter 1

# Overview of the integration with SharePoint Online

**Topics:**


- Overview of the integration

# Overview of the integration

Clarizen integration with SharePoint Online adds robust content management capabilities into the Clarizen user experience. The integration is supported for all Clarizen item types (e.g. work items, cases, etc.) and allows viewing, and editing SharePoint content (files, folders, sub-sites and sites) directly from Clarizen and linking them to Clarizen items. The linked SharePoint content appears in Clarizen, in the **Files** panel for the linked item.

**Note:** At this time, adding content from your file system to SharePoint Online via Clarizen is not yet supported. In addition, when viewing SharePoint Online content associated with Clarizen items, the content opens in SharePoint and not in Clarizen content viewer.

For more information on the benefits of the integration and the functionality available to Clarizen users post-integration, refer to the Clarizen integration with SharePoint Online article.

# Chapter 2

# Integration steps with SharePoint Online

**Topics:**

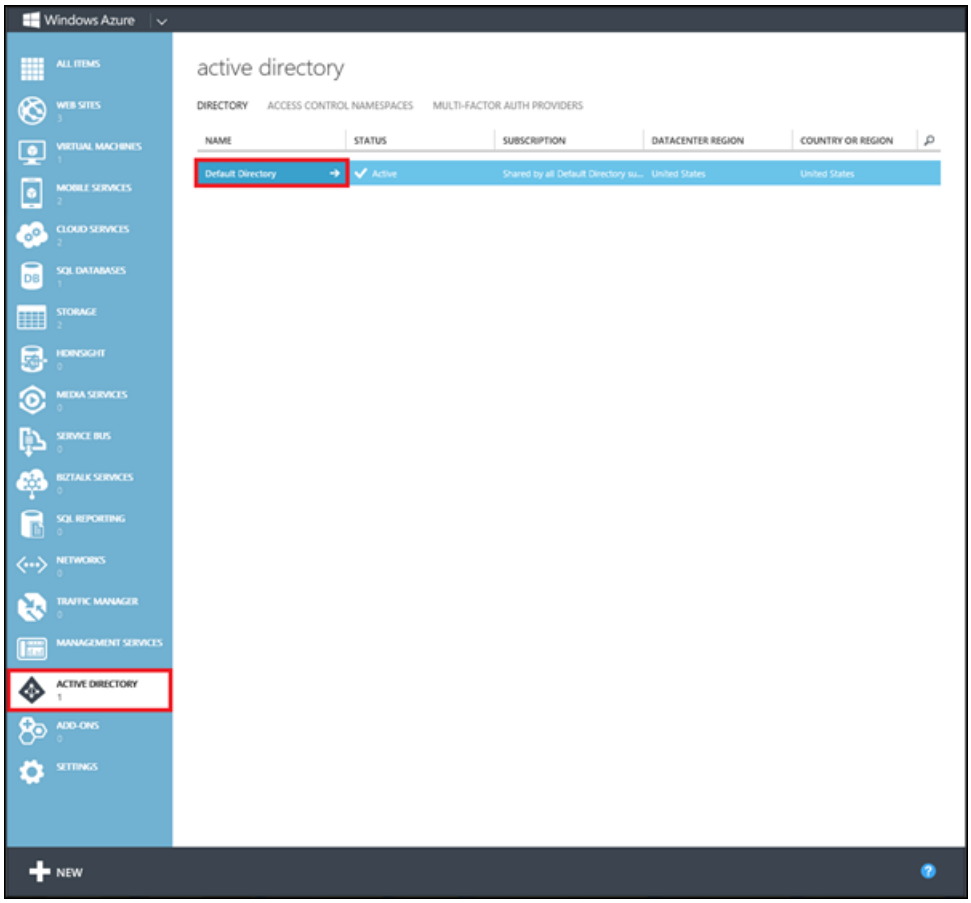

- 1. Register Clarizen application with Azure Active Directory
- 2. Register SharePoint in Clarizen
- 3. Authenticate user's Clarizen account with SharePoint

# 1. Register Clarizen application with Azure Active Directory

As a Microsoft 365 administrator, register Clarizen application with Azure Active Directory.

To register the application:

1. Log in to the Azure portal, and navigate to the **Applications** tab.
2. Log in to the Azure classic portal and navigate to Active Directory.



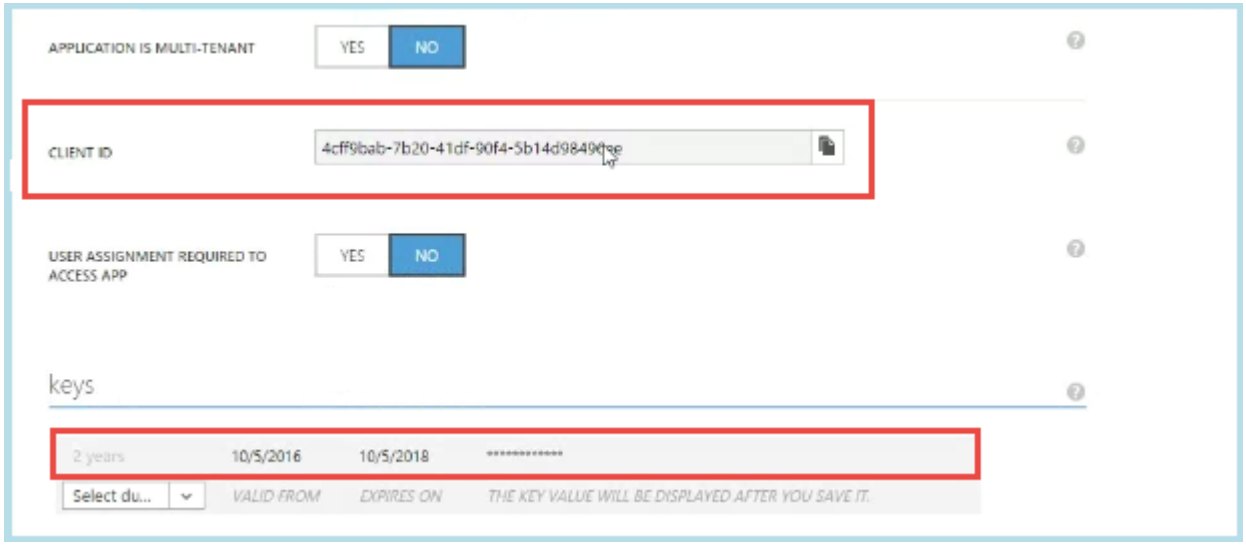

3. Select your directory, and then select the **Applications** tab at the top.
4. Click **ADD** at the bottom to create a new app registration.
5. Click **Add an application my organization is developing**.
6. In the **Add Application Wizard**, enter a **Name** for your application and click the Web Application. And/Or Web API type. Then click to continue.
7. In the **SIGN-ON URL** box, paste the your SharePoint URL. Enter that same URL in the **App ID URI** box with suffix `/Integration`. Then click to continue.

   For example:

   **Sign-on URL**: `https://companyname365.sharepoint.com`

   **App ID URI**: `https://companyname365.sharepoint.com/Integration`

8. Once the application has been added, click the **Configure** tab.
9. Copy the value from the **CLIENT ID** field. You will need this value to register the integration in Clarizen.




**10.** In the **keys** section, create a key. Click **Save**. Copy the value of the key, you will need the value to register the integration in Clarizen.

> **Note:** You **must** copy the key now, after you exit the application, the key value will be encoded and no longer visible.

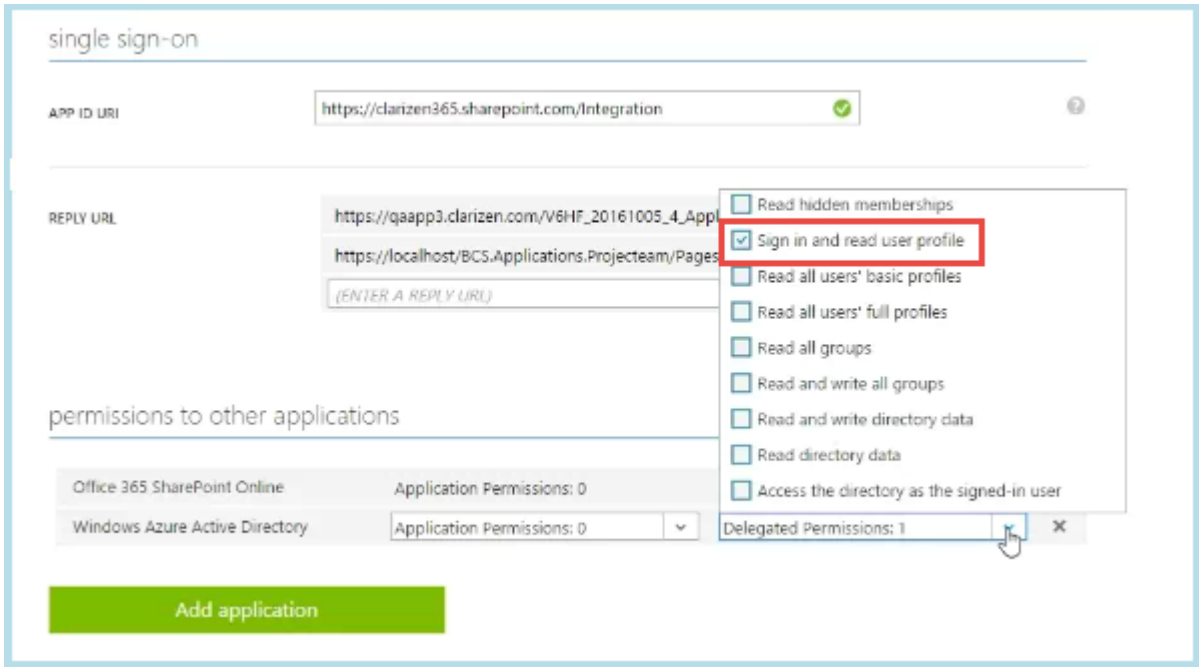
**11.** In the **Single Sign-on** section, edit the **Reply URL** to be the URL of your application appended with the path, *SharepointOnline/auth/callback.aspx*.

For example:

*https://app2.clarizen.com/Clarizen/Pages/Integrations/SharepointOnline/oAuthCallback.aspx*

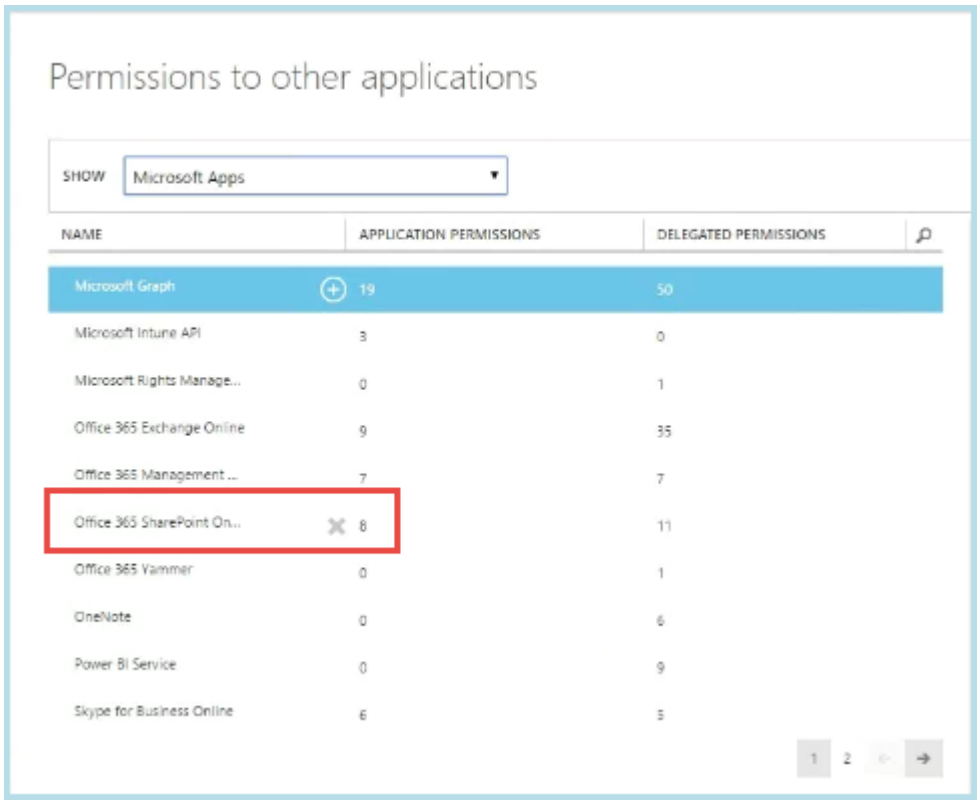
> **Note:** Make sure that you are using the HTTPS protocol.

**12.** In the **permissions to other applications** section, for **Windows Azure Active Directory**, select the **Sign in and read user profile** option.



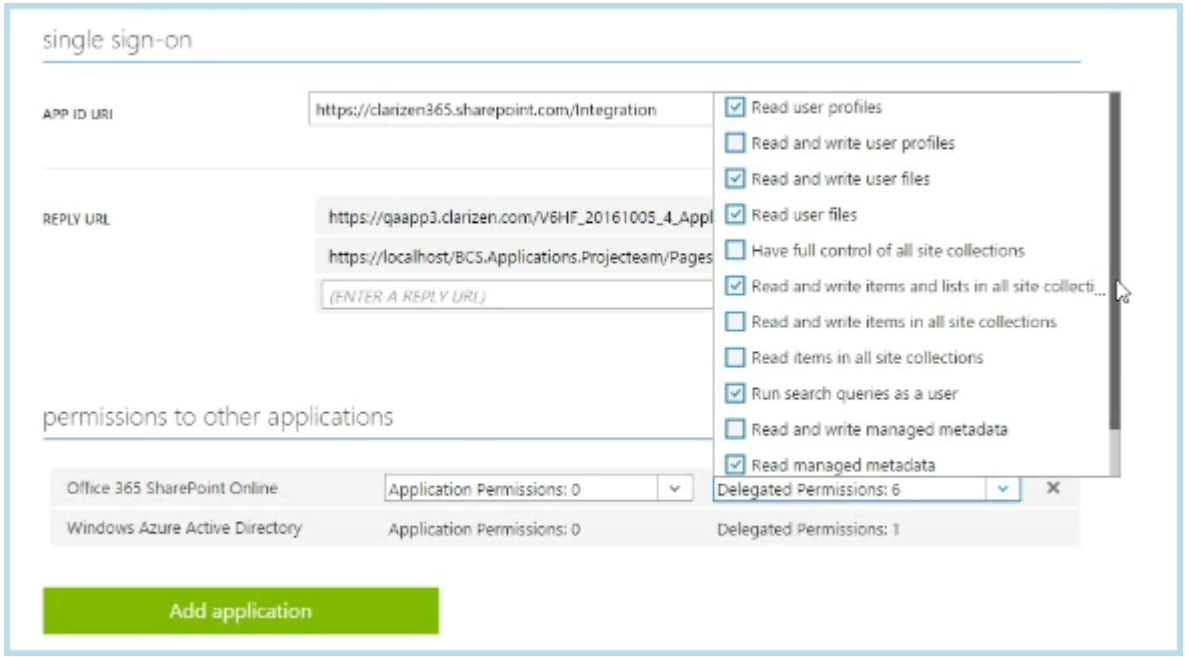

**13.** Click the **Add application** button.

**14.** Select the Office 365 SharePoint Online.




**15.** In the **permissions to other applications** section, for **Office 365 SharePoint Online**, select the following options:

- Read user profile
- Read and write user files
- Read and write items and lists in all site collections
- Run search queries as a user
- Read managed metadata



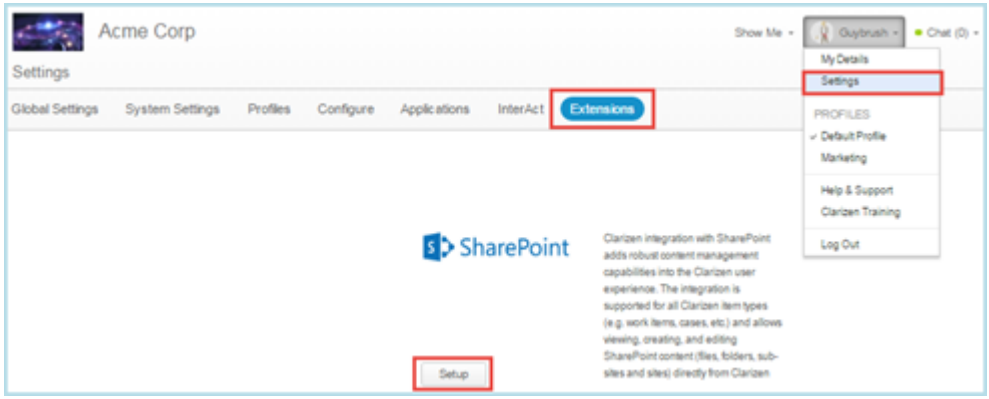
**16.** Click **Save** at the bottom of the screen.

## 2. Register SharePoint in Clarizen

As a Clarizen administrator, register SharePoint Online in Clarizen.

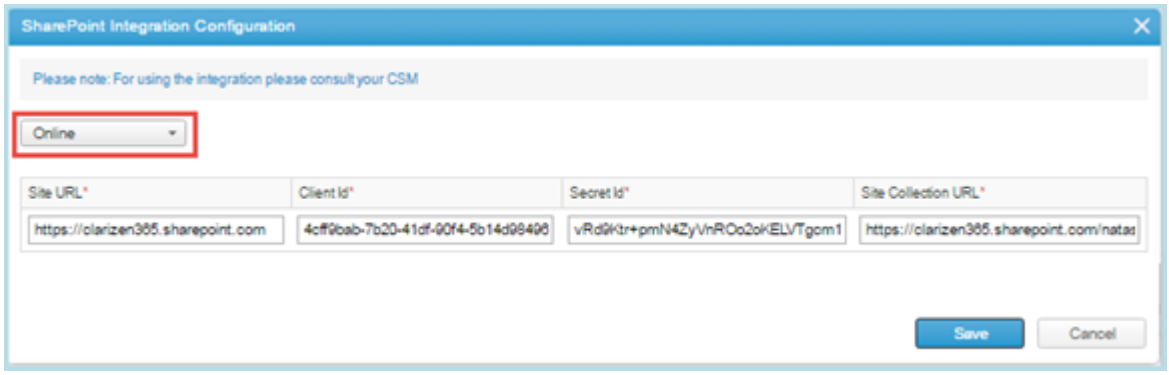
To register SharePoint in Clarizen:

1. In Clarizen, as an Administrator, navigate to **Settings** > **Extensions**.
2. In the **SharePoint section**, click the **Setup** button.




3. From the drop-down list, select **Online**.

> **Note:** At this time, you can either integrate with SharePoint Online **or** SharePoint 2013.




4. In the pop-up screen, enter values for the following parameters:
   - **Site URL**: URL of your Share Point site
   - **Client ID**: Is the Client ID value that you have saved when registering Clarizen application with Azure Active Directory in Step 9.
   - **Secret ID**: Is the key value that you saved when registering Clarizen application with Azure Active Directory in Step 10.
   - **Site Collection URL**: URL of the SharePoint site collection.
5. Click **Save**.

# 3. Authenticate user's Clarizen account with SharePoint

There are two ways to authenticate Clarizen users in SharePoint:

- By editing the **Integration Settings** in user's details. Once the integration settings are configured, users are not prompted to authenticate with SharePoint when attempting to open SharePoint content from Clarizen. Refer to the Editing integration settings for users on page 12 topic for instructions on how to perform this task.

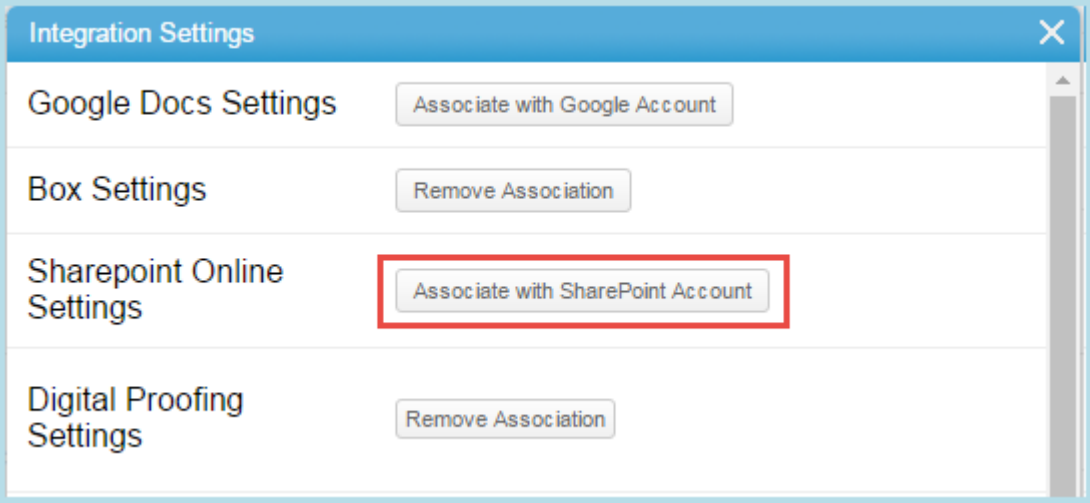
  **Note:** You can also automate the process using a workflow rule.

- At the run-time, when a user clicks SharePoint content in Clarizen, the user is prompted to enter their SharePoint credentials. Users are required to authenticate only when they access SharePoint content from Clarizen for the first time.

## Editing integration settings for users

To edit integration settings for yourself:

1. Click your name in the top menu > **My Details**.
2. In the **Personal Details** section > click **Edit** for the **Integration Settings** property.
3. In the **Integration Setting** pop-up window, click **Associate with SharePoint Account** button.




4. A new tab opens where you can log in to your Microsoft 365 account, which authenticates your Clarizen account with SharePoint Online.