

## Integrating Clarizen with SharePoint Online





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# 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

## 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.

🕂 Windows Azure 🛛 🗸					
ALLITEMS	active direct	ory			
🛞 weesens	DIRECTORY ACCESS C	ONTROL NAMESPACES MU	LTI-FACTOR AUTH PROVIDERS		
	NAME	STATUS	SUBSCRIPTION	DATACENTER REGION	COUNTRY OR REGION
MOBILE SERVICES	Default Directory	→ V Adhe	Shared by all Default Directory	su United States	United States
CLOUD SERVICES					
SQL DATABASES					
STORAGE 2					
номосни					
O MEDIA SERVICES					
E service bus					
TRAFFIC MANAGER					
MANAGMONT SERVICES					
ACTIVE DIRECTORY					
8 100-0NS					
SETTINGS					
+ NEW					0

- 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.

APPLICATION IS MULTI-TENANT	YES NO		0	
CLIENT ID	4cff9bab-7b20-41df	-90f4-5b14d984900e	0	
USER ASSIGNMENT REQUIRED TO ACCESS APP	YES NO		0	
keys			0	
2 years 10/5/2016	10/5/2018	*******		
Select du VALID FRO	DM DXPIRES ON	THE KEY VALUE WILL BE DISPLAYED AFTER YOU SAVE IT.		

**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.

ID URI	https://clarizen365.sharepoint.com/Integration	0
PLY URL ermissions to other app	https://qaapp3.clarizen.com/V6HF_20161005_4_A https://localhost/BCS.Applications.Projecteam/Pag (ENTER A REPLY URL)	ppl Read hidden memberships Sign in and read user profile Read all users' basic profiles Read all users' full profiles Read all groups Read and write all groups Read and write directory data
Office 365 SharePoint Online	Application Permissions: 0	Read directory data Access the directory as the signed-in user
Windows Azure Active Directory	Application Permissions: 0	Delegated Permissions: 1

13. Click the Add application button.

14. Select the Office 365 SharePoint Online.

SHOW Microsoft Apps	•		
NAME	APPLICATION PERMISSIONS	DELEGATED PERMISSIONS	
Microsoft Graph	(+) 19	50	
Microsoft Intune API	3	0	
Microsoft Rights Manage	0	1	
Office 365 Exchange Online	9	35	
Office 365 Management	7	7	
Office 365 SharePoint On	30.8	13	
Office 365 Yammer	0	1	
OneNote	o	6	

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

P ID URI	https://clarizen365.sharepoint.com/Integration	n Read user profiles
		Read and write user profiles
		Read and write user files
EPLY URL	https://qaapp3.clarizen.com/V6HF_20161005	5_4_Appl 🗹 Read user files
	https://localhost/BC5.Applications.Projectear	m/Pages Have full control of all site collections
	(ENTER A REPLY URL)	Read and write items and lists in all site collecti
		Read and write items in all site collections
		Read items in all site collections
		Run search queries as a user
permissions to other app	lications	Read and write managed metadata
		Read managed metaclata
	Application Permissions: 0	✓ Delegated Permissions: 6 ✓ X
Office 365 SharePoint Online		

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.

A	cme Corp						Show Me +	🕀 Guybrush • 🔹	Chat (0) +
Settings								Ny Details Settings	
Global Settings	System Settings	Profiles C	onfigure	Applications	InterAct 🤇	Extensions		PROFILES - Default Profile Marketing	
								Help & Support Clarizen Training	
				s > Sh	arePoint	Clarizen integration with SI adds robust content manac	arePoint errent	Log Out	
				Setup	]	capabilities into the Clarize experience. The integration supported for all Clarizen is (e.g. work items, cases, etc.) viewing, oreating, and editi SharePoint content (files, fo sites and sites) directly from	n user h is em types ) and allows 10 klders, sub- 1 Clarizen		

- 3. From the drop-down list, select Online.
  - Note: At this time, you can either integrate with SharePoint Online or SharePoint 2013.

SharePoint Integration Configuration	n		×
Please note: For using the integration plea	ise consult your CSM		
Online *			
Site URL*	Client Id*	Secret Id*	Site Collection URL*
https://clarizen365.sharepoint.com	4cf9bab-7b20-41df-90f4-5b14d98498	vRd9Ktr+pmN4ZyVnROo2oKELVTgom1	https://clarizen365.sharepoint.com/natas
-			
			Save Cancel

- 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.

Integration Settings		×
Google Docs Settings	Associate with Google Account	<b>^</b>
Box Settings	Remove Association	
Sharepoint Online Settings	Associate with SharePoint Account	
Digital Proofing Settings	Remove Association	

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