

SharePoint setup

Introduction

This document describes how to setup SharePoint with client secret authentication in Azure Portal.

- If you have previously not setup OAuth e-mail and only intend to use the SharePoint feature, please start at the [Azure Portal setup](#) section.
- If you have already setup OAuth e-mail, please refer to the [Add Microsoft Graph API for SharePoint](#) section then proceed to [Setup SharePoint in Monitor ERP](#).
- If you intend to setup OAuth e-mail please refer to the Monitor online help section [Activate OAuth 2.0 with Microsoft Entra ID](#). After completing the e-mail setup, proceed to the [Add Microsoft Graph API for SharePoint](#) section followed by [Setup SharePoint in Monitor ERP](#).

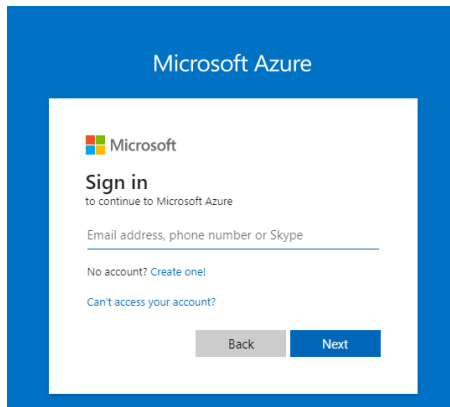
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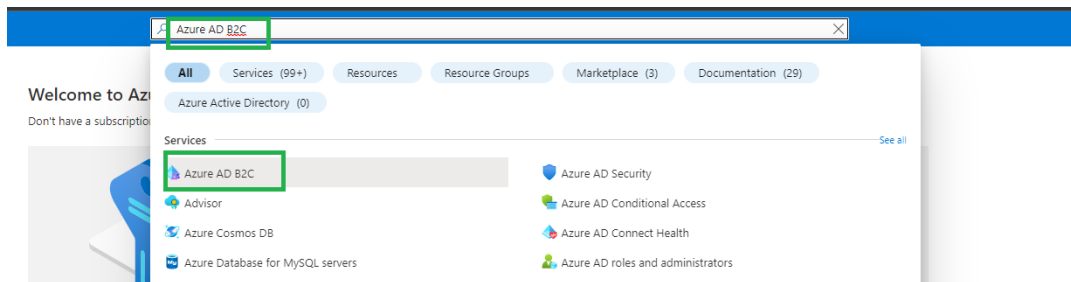
Client secret authentication for SharePoint

Azure Portal setup

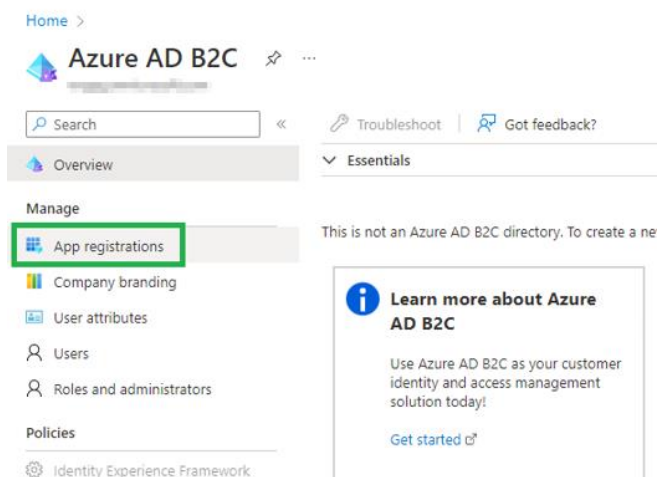
1. Sign in with an existing Azure account at <https://portal.azure.com>.



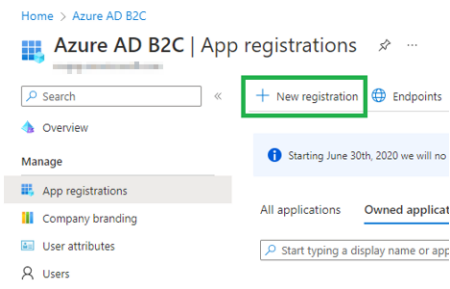
2. Once signed in, search for and access "Azure AD B2C".



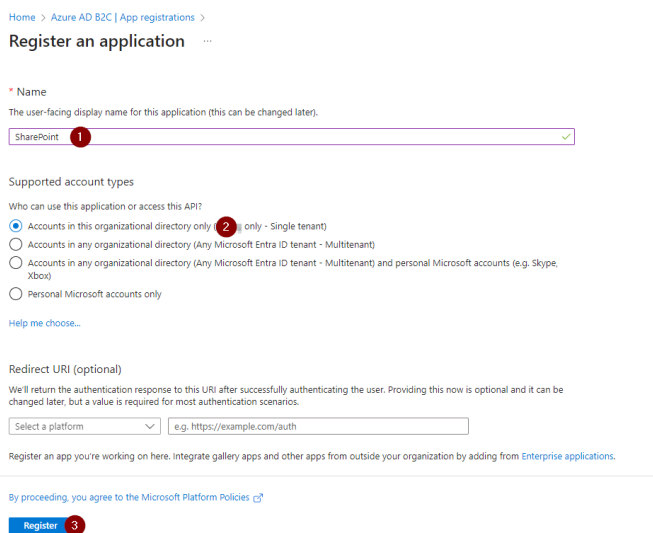
3. Click on "App registrations".



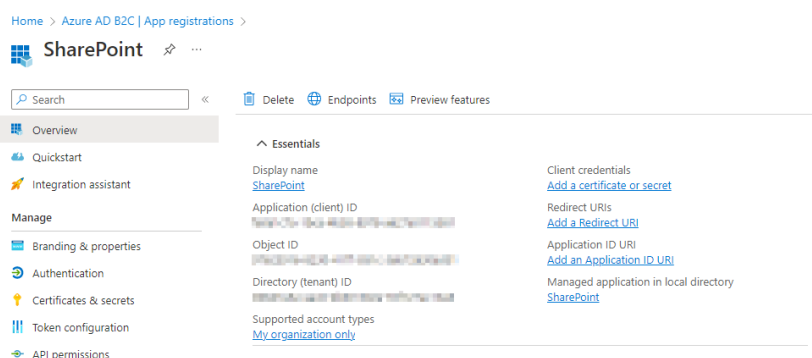
4. Click on "New registration".



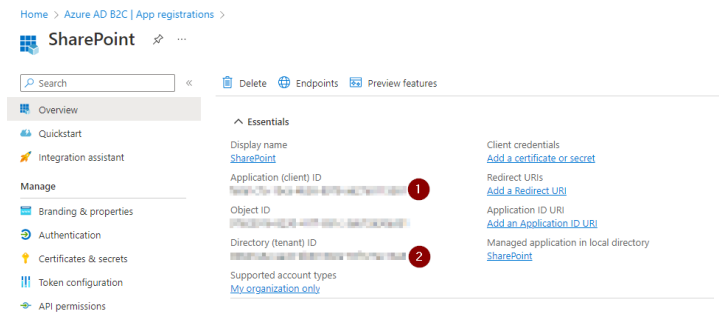
5. Enter a name and select your preferred account type (set to single tenant by default) then click on the "Register" button.



6. You will be forwarded to the menu of the application you just registered, if not – click on the application.



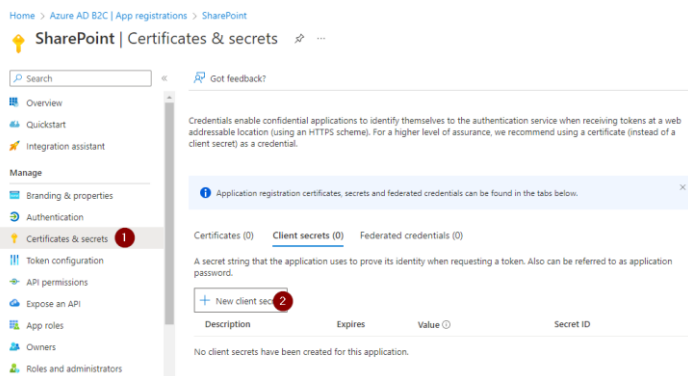
7. Copy the values of the Application (client) ID and Directory (tenant) ID and save them, you will need them later.



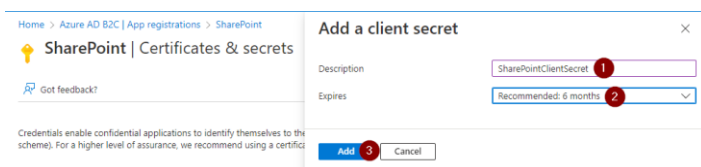
Generate new client secret

If a client secret has been previously setup with OAuth e-mail, this step can be skipped.

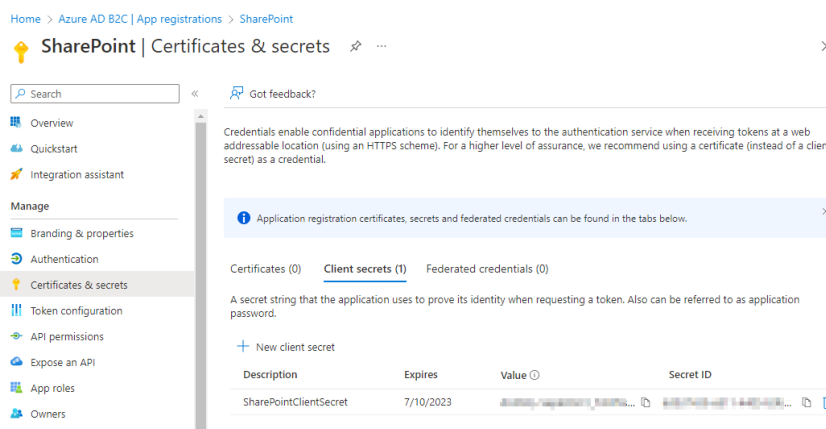
1. Access “Certificates & secrets” in the left-hand menu and click on “New client secret” (the following three steps can be skipped if you have already generated a client secret).



2. Enter a name and set a preferred client secret expiration, then click “Add”.

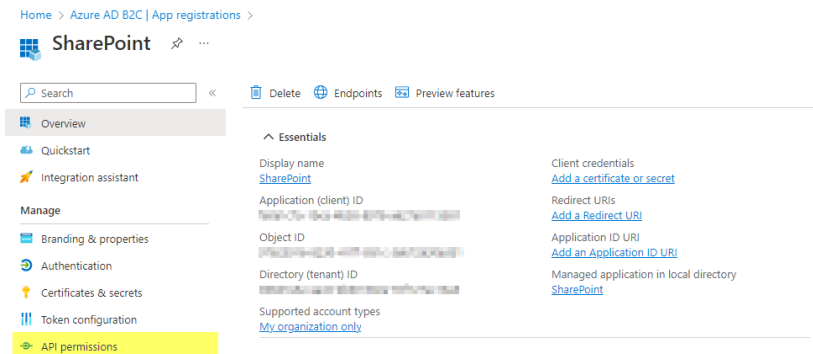


3. Note that the client secret can only be copied once – copy the content in “Value” and store it in a safe place, you will need it later.

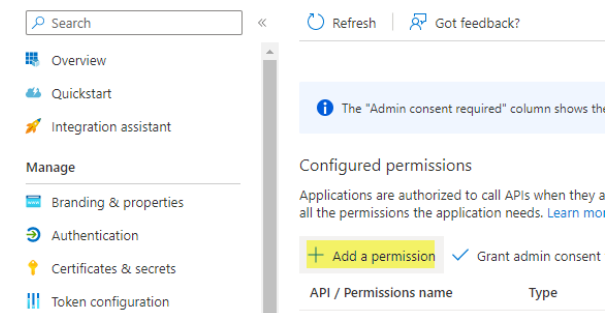


Add Microsoft Graph API for SharePoint

1. Click on "API permissions" in the left-hand menu in Azure Portal.



2. Click on "Add a permission".



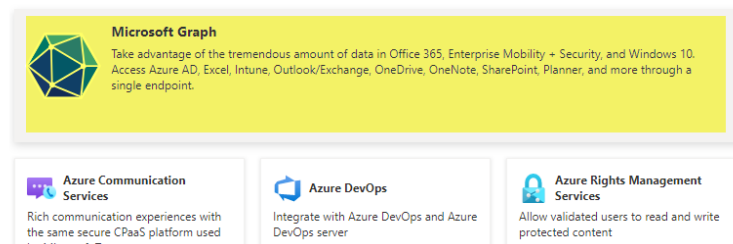
3. Click on "Microsoft Graph" to select it as an API.

Request API permissions

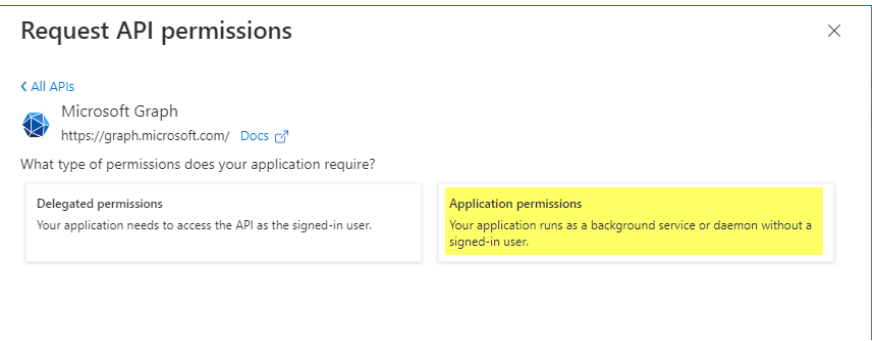
Select an API

Microsoft APIs APIs my organization uses My APIs

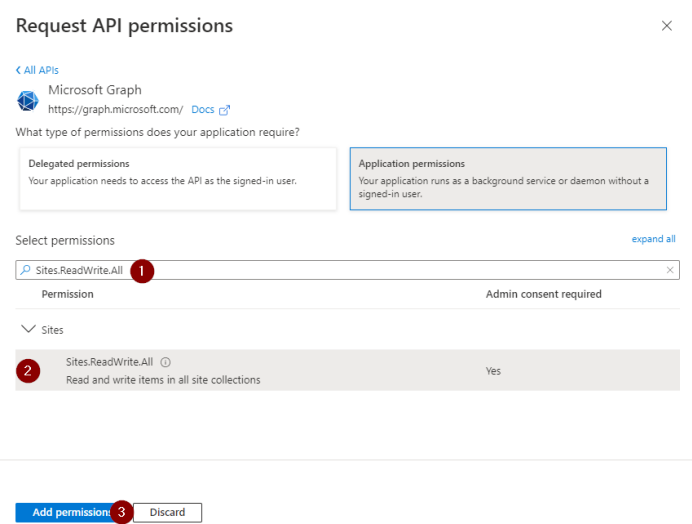
Commonly used Microsoft APIs



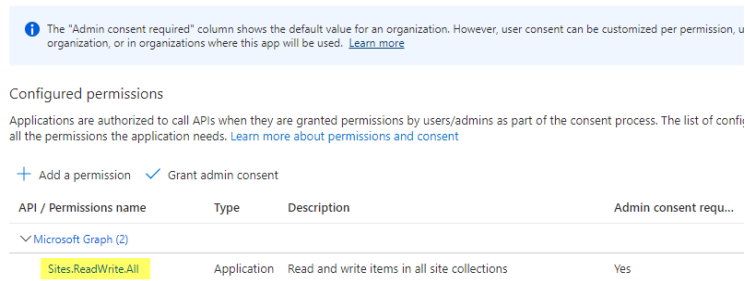
4. Click on “Application permissions”.



5. Search for “Sites.ReadWrite.All” then mark the checkbox on the item in the list and click on “Add permissions”.

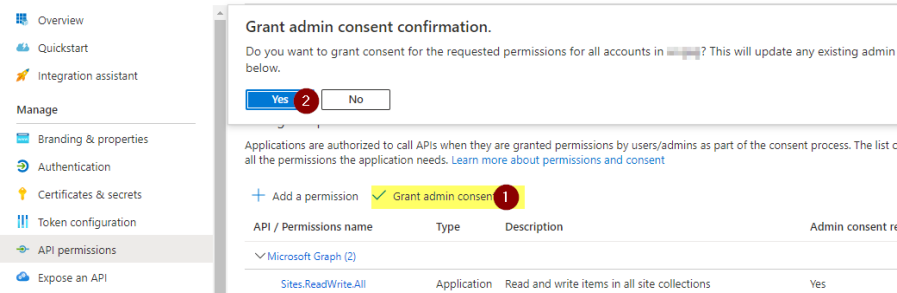


6. Verify that the API has been added.

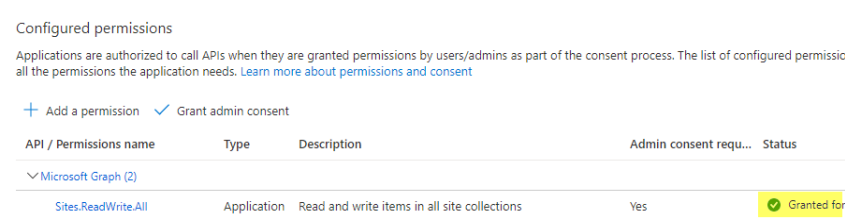


7. Grant admin consent.

Monitor ERP **requires full access** to all SharePoint sites through Graph, additional settings may be applied to adapt the level of security.

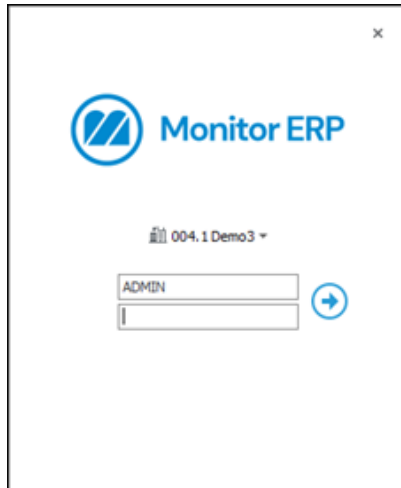


8. Verify that the icon is green.

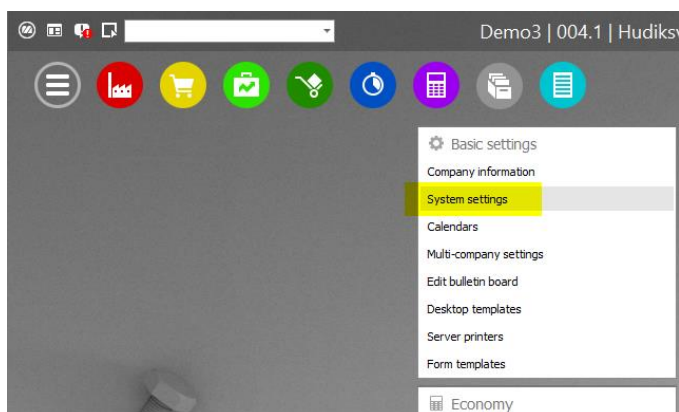


Setup SharePoint in Monitor ERP

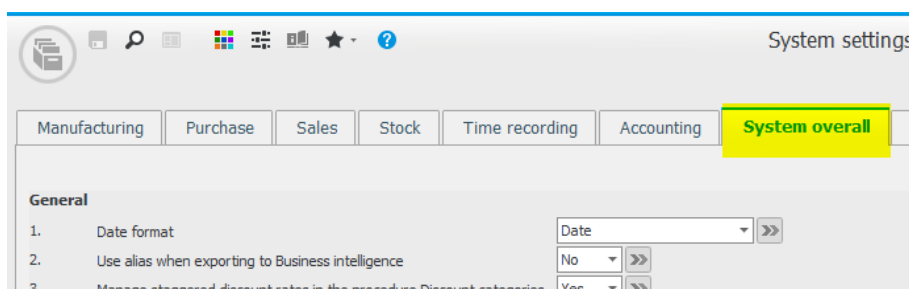
1. Start the Monitor ERP client and sign in with the appropriate admin account.



2. Access the "System settings" procedure.



3. Click on the "System overall" tab.



4. Paste the Application (client) ID previously saved from Azure in the corresponding field.

The screenshot shows the 'System settings' window with the 'System overall' tab selected. The 'E-mail' section is expanded, showing fields 13 through 19. Field 20, 'Application (client) ID', is highlighted in yellow. The 'Microsoft Entra ID (Azure Exchange/SharePoint)' section is also expanded, showing fields 21 through 23.

5. Paste the Directory (tenant) ID previously saved from Azure in the corresponding field.

The screenshot shows the 'System settings' window with the 'System overall' tab selected. The 'E-mail' section is expanded, showing fields 13 through 19. Field 21, 'Directory (tenant) ID', is highlighted in yellow. The 'Microsoft Entra ID (Azure Exchange/SharePoint)' section is also expanded, showing fields 22 through 23.

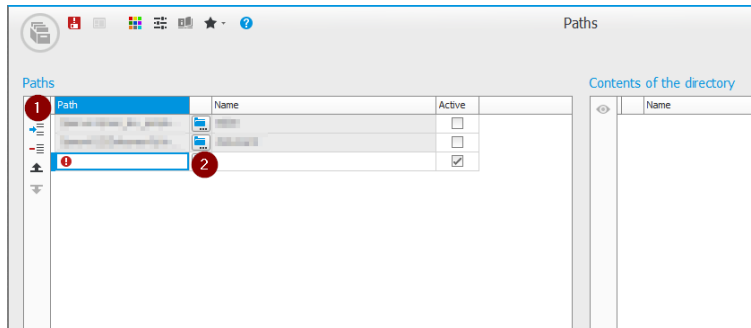
6. Paste the Client secret previously saved from Azure in the corresponding field then save.

The screenshot shows the 'System settings' window with the 'System overall' tab selected. The 'E-mail' section is expanded, showing fields 13 through 19. Field 23, 'Client secret', is highlighted in yellow. The 'Microsoft Entra ID (Azure Exchange/SharePoint)' section is also expanded, showing fields 20 through 22.

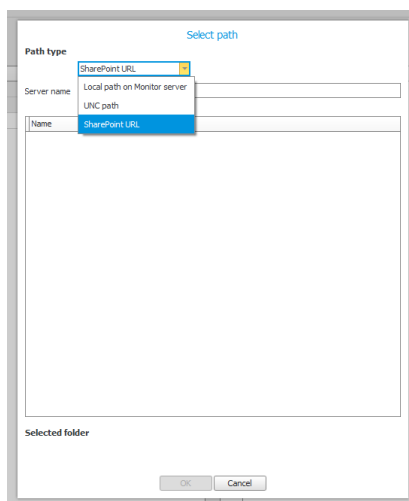
Note: The "Authentication flow" setting does not affect the setup of SharePoint but should be updated accordingly when used in combination with settings for OAuth e-mail.

Add SharePoint links in Monitor ERP

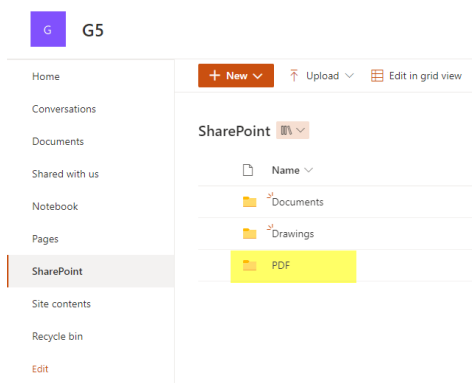
1. Open the “Paths” procedure and add a new path then click on the folder icon.



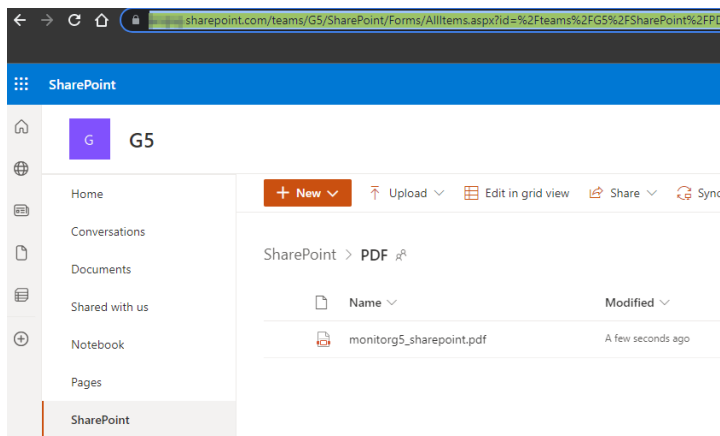
2. Change the “Path type” to **SharePoint URL**.



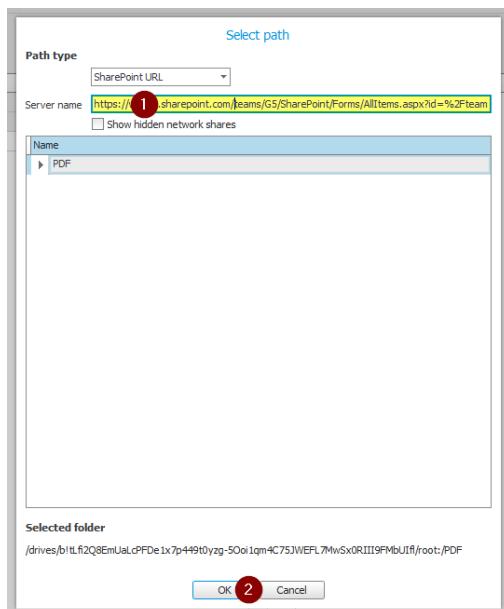
3. Access SharePoint online and click on the folder you want to share.



4. Copy the URL from your SharePoint folder.



5. Paste the URL in the server name field, Tab then press OK to add the path.



6. The path will be added and the files will be visible in the box to the right, press save.

