

# Chapter 6: Microsoft SharePoint

Commence RM can be integrated with Microsoft SharePoint, a popular document management platform that natively integrates with Microsoft Office and is used by thousands of corporations as a document library.

SharePoint allows you to store all customer documents in one place and offers storage capacities that are greater than that offered by traditional CRM software programs. By providing this integration, Commence RM customers can now take advantage of this functionality and securely share information across departments.

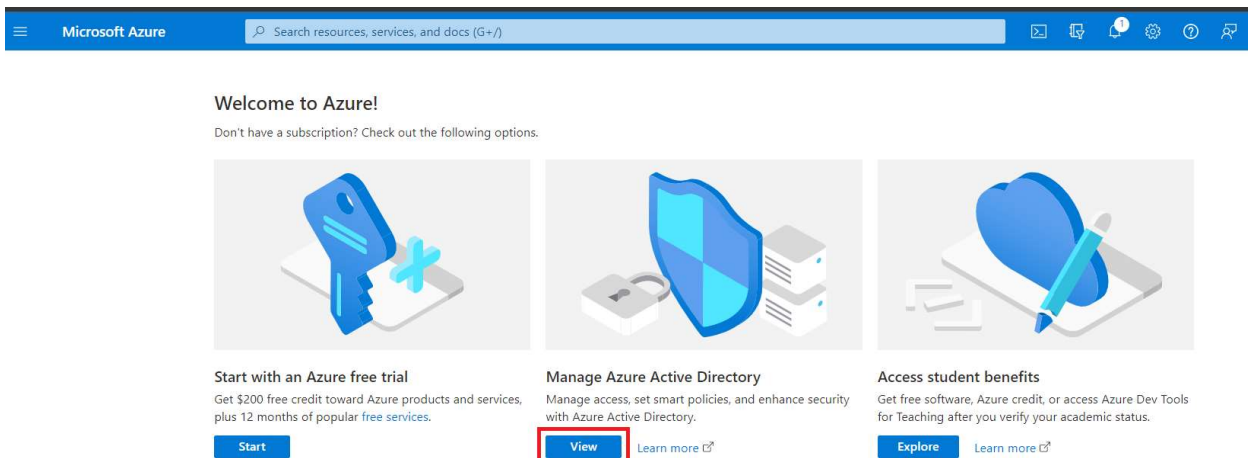
By integrating Commence with SharePoint, your staff will be able to:

- Gain access to your company's central repository of documents
- Access SharePoint documents without having to leave the Commence application

## Configuring SharePoint Integration

### Create SharePoint Application in Azure

- 1 Open the Azure portal home page <https://portal.azure.com/#home>
- 2 Login as your Microsoft 365 administrator
- 3 Click Manage Azure Active Directory – View button




Microsoft Azure

Search resources, services, and docs (G+)


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In the left panel select the “App registrations” option. In the right panel, click on the “New registration” option.

portal.azure.com/#view/Microsoft\_AAD\_IAM/ActiveDirectoryMenuBlade/~./RegisteredApps

Microsoft Azure Search resources, services, and docs (G+)

Home > Commence Corporation

Commence Corporation | App registrations

Overview Preview features Diagnose and solve problems

Manage Users Groups External Identities Roles and administrators Administrative units Delegated admin partners Enterprise applications Devices App registrations Identity Governance Application proxy

+ New registration Endpoints Troubleshooting Refresh Download Preview

Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Microsoft Graph. [Learn more](#)

All applications Owned applications Deleted applications

Start typing a display name or application (client) ID to filter these r... Add filters

1 applications found

Display name ↑

cc Commence Cloud

## Add Application Details

In the next screen enter an application Name, for example “Commence RM”. For Supported Account Types select the highlighted option (see screenshot below) and leave the “Redirect URI” field blank. To save your selections click the “Register” button.

Microsoft Azure Search resources, services, and docs (G+)

Home > Commence Corporation | App registrations >

Register an application

\* Name

The user-facing display name for this application (this can be changed later).

Supported account types

Who can use this application or access this API?

Accounts in this organizational directory only (Commence Corporation only - Single tenant)

Accounts in any organizational directory (Any Azure AD directory - Multitenant)

Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)

Personal Microsoft accounts only

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

By proceeding, you agree to the [Microsoft Platform Policies](#)

Register

The screen will refresh showing the Application detail screen. In the left side menu select the Authentication option.

Microsoft Azure Search resources, services, and docs (G+)

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## Commence RM

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  - Certificates & secrets
  - Token configuration
  - API permissions
  - Expose an API
  - App roles

### Essentials

Display name  
[Commence RM](#)

Application (client) ID  
7472a7d8-4dbc-4477-9a5d-be907761b0c7

Object ID  
3c982bb7-3d01-4851-8589-d37cf9bf9f64

Directory (tenant) ID  
2bc9aca8-443c-4146-b910-75b1f4420c40

Supported account types  
[My organization only](#)

Client credentials  
[Add a certificate or secret](#)

Redirect URIs  
[Add a Redirect URI](#)

Application ID URI  
[Add an Application ID URI](#)

Managed application in local directory  
[Commence RM](#)

**i** Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure AD G to provide technical support and security updates but we will no longer provide feature updates. Applications will need to be upgraded to Authentication Library (MSAL) and Microsoft Graph. [Learn more](#)

The screen will refresh opening the Authentication details.

Home > Commence RM

## Commence RM | Authentication

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- Support + Troubleshooting
  - Troubleshooting
  - New support request

### Platform configurations

Depending on the platform or device this application is targeting, additional configuration may be required such as redirect URIs, specific authentication settings, or fields specific to the platform.

[+ Add a platform](#)

### Supported account types

Who can use this application or access this API?

Accounts in this organizational directory only (Commence Corporation only - Single tenant)

Accounts in any organizational directory (Any Azure AD directory - Multitenant)

[Help me decide...](#)

**⚠** Due to temporary differences in supported functionality, we don't recommend enabling personal Microsoft accounts for an existing registration. If you need to enable personal accounts, you can do so using the manifest editor. [Learn more about these restrictions.](#)

### Advanced settings

**Allow public client flows** ⓘ

Enable the following mobile and desktop flows: Yes No

- App collects plaintext password (Resource Owner Password Credential Flow) [Learn more](#)
- No keyboard (Device Code Flow) [Learn more](#)
- SSO for domain-joined Windows (Windows Integrated Auth Flow) [Learn more](#)

**App instance property lock** ⓘ

Configure the application instance modification lock. [Learn more](#) [Configure](#)

Click on the "Add a platform" button to open the right side menu. Please see the screenshot  
Microsoft Outlook Address Book: Configuring the Outlook Address Book

below:

Home > Comence RM

## Comence RM | Authentication

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### Platform configurations

Depending on the platform or device this application is targeting, a redirect URIs, specific authentication settings, or fields specific to the platform.

[+ Add a platform](#)

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Who can use this application or access this API?

Accounts in this organizational directory only (Comence Corporation)

Accounts in any organizational directory (Any Azure AD directory - Multitenant)

[Help me decide...](#)

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### Configure platforms

#### Web applications

- Web**  
Build, host, and deploy a web server application. .NET, Java, Python
- Single-page application**  
Configure browser client applications and progressive web applications. Javascript.

#### Mobile and desktop applications

- iOS / macOS**  
Objective-C, Swift, Xamarin
- Android**  
Java, Kotlin, Xamarin
- Mobile and desktop applications**  
Windows, UWP, Console, IoT & Limited-entry Devices, Classic iOS + Android

Select "Mobile and desktop application" and the right panel will refresh showing the "Redirect URI" settings. Select the first option to use the login.microsoftonline.com URL and then click on the "Configure" button to save your settings.

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## Comence ESRM Files | Authentication

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Depending on the platform or device this application is targeting, additional configuration may be required such as redirect URIs, specific authentication settings, or fields specific to the platform.

[+ Add a platform](#)

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[Help me decide...](#)

**⚠️** Due to temporary differences in supported functionality, we don't recommend enabling personal Microsoft accounts for an existing registration. If you need to enable personal accounts, you can do so using the manifest editor. [Learn more about these restrictions.](#)

### Advanced settings

#### Allow public client flows

Enable the following mobile and desktop flows:  Yes  No

- App collects plaintext password (Resource Owner Password Credential Flow) [Learn more](#)
- No keyboard (Device Code Flow) [Learn more](#)
- SSO for domain-joined Windows (Windows Integrated Auth Flow) [Learn more](#)

[Save](#) [Discard](#)

### Configure Desktop + devices

< all platforms [Quickstart](#) [Docs](#)

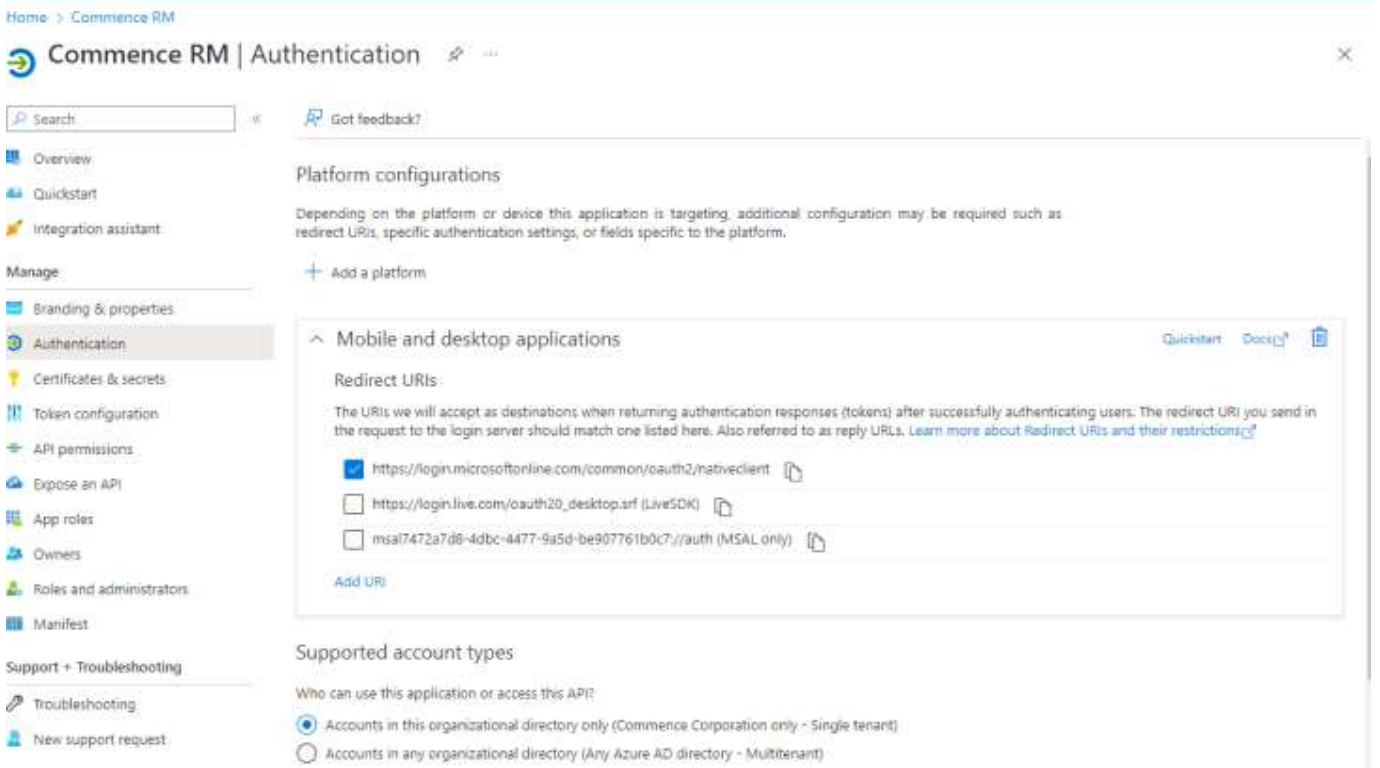
#### Redirect URIs

The URIs we will accept as destinations when returning authentication responses (tokens) after successfully authenticating users. The redirect URI you send in the request to the login server should match one listed here. Also referred to as reply URLs. [Learn more about Redirect URIs and their restrictions.](#)

- <https://login.microsoftonline.com/common/oauth2/nativeclient>
- [https://login.live.com/oauth20\\_desktop.ort \(LINE5DN\)](https://login.live.com/oauth20_desktop.ort (LINE5DN))
- <msal7b34449-9999-4321-862f-bf701b31726d//auth @MSAL only>

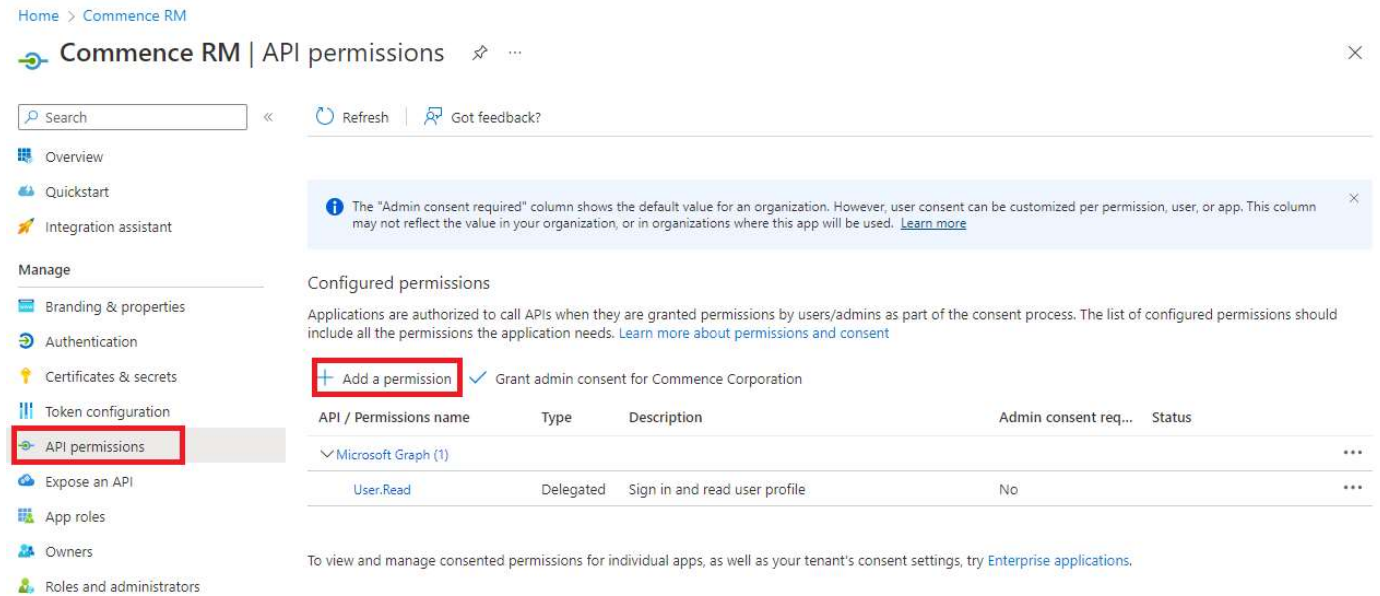
#### Custom redirect URIs

[Configure](#) [Cancel](#)



## Add Application Permissions

Next we need to add the OneDrive and SharePoint Sites permissions to the application. In the left side menu click on the “API permissions” option, then click on “Add a permission”.



When the right side menu appears, click on the “Microsoft Graph” option, please see the screenshot below:

Home > Commence RM

## Commence RM | API permissions

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Expose an API

The "Admin consent" may not reflect the

Configured permissions  
Applications are authorized to include all the permissions

+ Add a permission

API / Permissions name  
Microsoft Graph (1)  
User.Read

### Request API permissions

Select an API

Microsoft APIs APIs my organization uses My APIs

Commonly used Microsoft APIs

**Microsoft Graph**  
Take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Azure AD, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.

**Azure Communication Services**  
Rich communication experiences with the same secure CPaaS platform used by Microsoft Teams

**Azure Data Catalog**  
Programmatic access to Data Catalog resources to register, annotate and search data assets

**Azure DevOps**  
Integrate with Azure DevOps and Azure DevOps server

Click on the "Application permissions" option. In the Select Permissions field type "File" and select the checkbox "Files.ReadWrite.All" from the list, please see below screenshot.

Commence RM | API permissions

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The "Admin consent" may not reflect the

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Applications are authorized to include all the permissions

+ Add a permission

API / Permissions name  
Microsoft Graph (1)  
User.Read

To view and manage con

< All APIs

Microsoft Graph  
https://graph.microsoft.com/ Docs

What type of permissions does your application require?

Delegated permissions  
Your application needs to access the API as the signed-in user.

**Application permissions**  
Your application runs as a background service or daemon without a signed-in user.

Select permissions expand all

File

Permission	Admin consent required
> CrossTenantUserProfileSharing	
<input checked="" type="checkbox"/> <b>Files (1)</b> <input type="checkbox"/> Files.Read.All Read files in all site collections Yes	
<input checked="" type="checkbox"/> <b>Files.ReadWrite.All</b> Read and write files in all site collections Yes	
> OnPremisesPublishingProfiles	

**Add permissions** Discard

Click on the "Add permissions" button.

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⚠ You are editing permission(s) to your application, users will have to consent even if they've already done so previously.

ℹ The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

## Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission  Grant admin consent for Commence Corporation

API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (2)				
Files.ReadWrite.All	Application	Read and write files in all site collections	Yes	⚠ Not granted for Commence...
User.Read	Delegated	Sign in and read user profile	No	...

Repeat the above steps to add the SharePoint Sites permissions to the application. In the left side menu click on the "API permissions" option, then click on "Add a permission". In the Select Permissions field type "Site" and select the checkboxes : "Sites.Read.All" and "Sites.ReadWrite.All" from the list.

Click on the "Add permissions" button.

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+ Add a permission  Grant admin consent for Commence Corporation

API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (4)				
Files.ReadWrite.All	Application	Read and write files in all site collections	Yes	⚠ Not granted for Commence...
Sites.Read.All	Application	Read items in all site collections	Yes	⚠ Not granted for Commence...
Sites.ReadWrite.All	Application	Read and write items in all site collections	Yes	⚠ Not granted for Commence...
User.Read	Delegated	Sign in and read user profile	No	...

To view and manage consented permissions for individual apps, as well as your tenant's consent settings, try [Enterprise applications](#).

Next click on "Overview" from the left side menu, to show the Client ID and Directory (tenant) ID values.

Home >

## Commence RM

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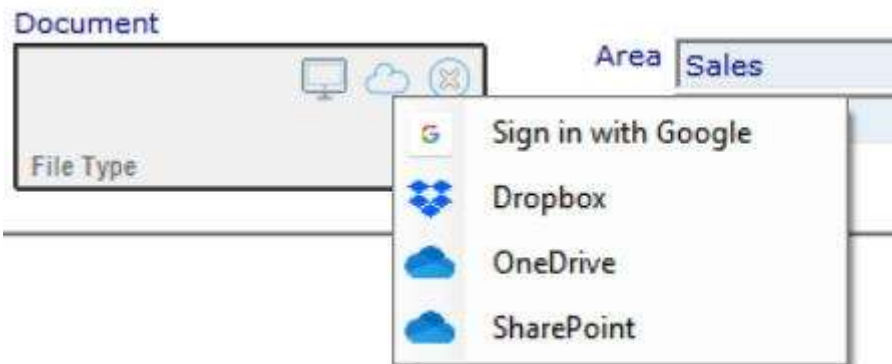
Display name <a href="#">Commence RM</a>	Client credentials <a href="#">Add a certificate or secret</a>
Application (client) ID 7472a7d8-4dbc-4477-9a5d-be907761b0c7	Redirect URIs <a href="#">0 web_0 spa_1 public client</a>
Object ID 3c982bb7-3d01-4851-8589-d37cf9bf9f64	Application ID URI <a href="#">Add an Application ID URI</a>
Directory (tenant) ID 2bc9aca8-443c-4146-b910-75b1f4420c40	Managed application in local directory <a href="#">Commence RM</a>
Supported account types <a href="#">My organization only</a>	

Copy the Application (client) ID and Directory (tenant) ID. These values will be needed to configure Commence to login to SharePoint.

## Using Files from SharePoint

### Login to Access SharePoint Files

- 1 Run Commence RM.
- 2 Open a detail form and use the data file field.
- 3 Select "SharePoint" from the dropdown.



Enter your Client ID and Tenant ID for the Microsoft Graph application created in the prior section.

SharePoint configuration

SharePoint configuration.

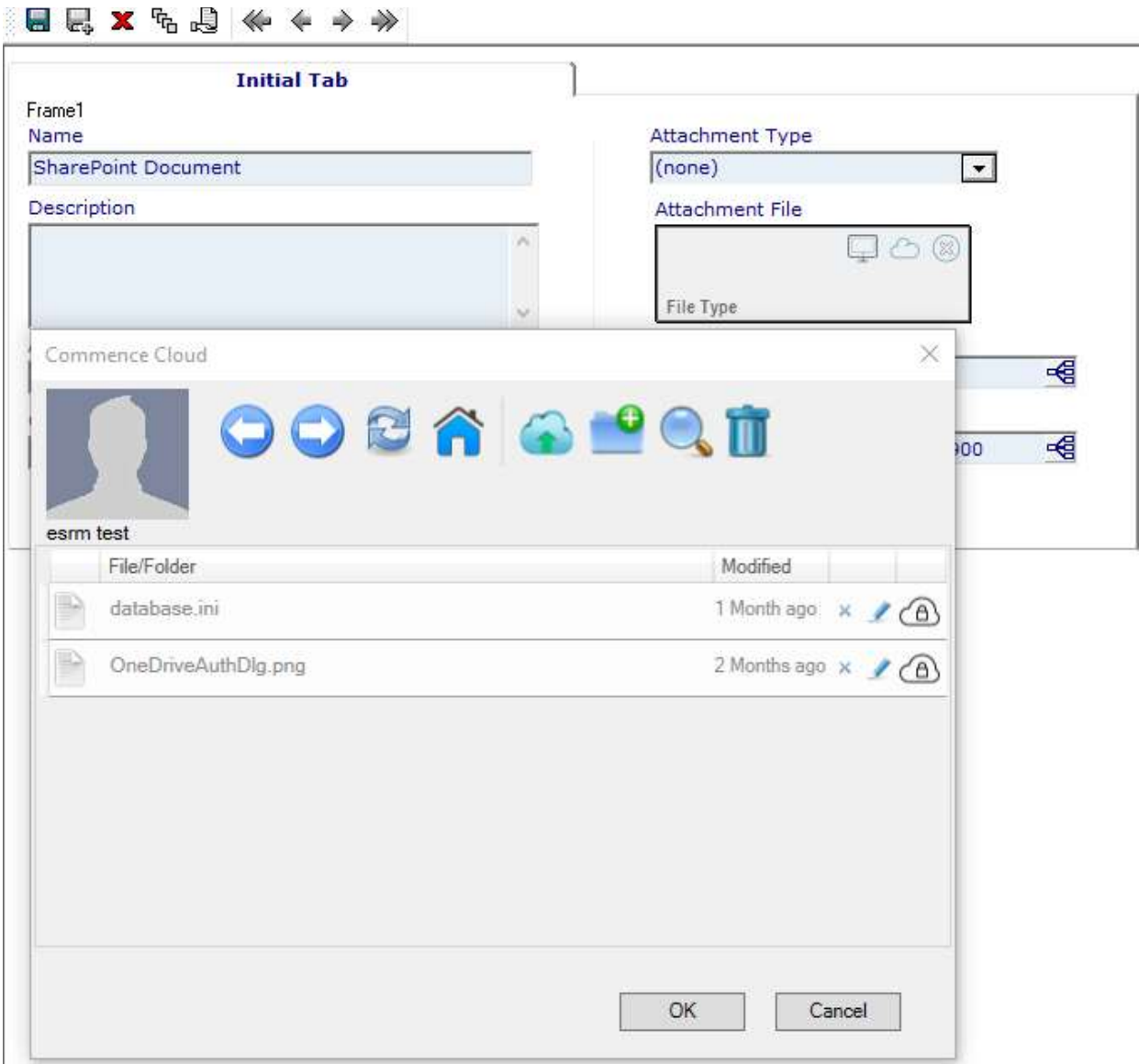
Graph Application Client ID

Graph Application Tenant ID

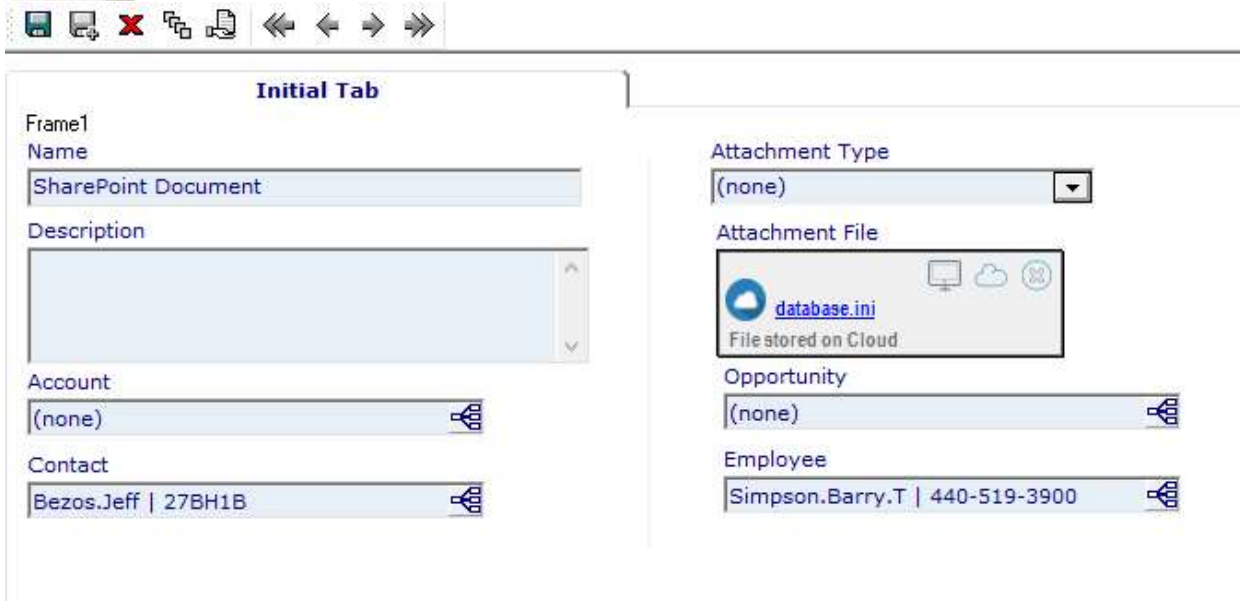
Ok Cancel



Click on Ok to authorize access to your SharePoint documents. Select the document you want to connect to the Commence record and click OK.



The detail form will now show the link to the document stored in SharePoint.



## Chapter 7: Microsoft Outlook Address Book

The Address Book feature can be used with Microsoft Outlook 2000 and later versions. Multiple mail systems such as MS Mail, Internet Mail, CompuServe, and AOL can all plug into Microsoft Outlook in order to provide a single, consistent interface for electronic mail. Since Microsoft Outlook operates as a front-end for multiple and potentially very different mail systems, there are some associated inherent problems. As an example, each mail system typically has its own address book, which leads to difficulty in locating an individual's address, as well as potentially redundant data.

For instance, if Fred has an AOL account, an Internet ID, as well as a fax machine, information about Fred must be entered into three separate address books. Ultimately, it may require searching up to three address books in order to determine all the possible means of sending him a message. Not only is this time consuming, but frustrating as well.

Commence solves this problem by providing its users with a universal address book. A selected category within Commence may now be accessed by Microsoft Outlook for use as an Address Book for such applications as addressing electronic mail messages, faxing documents, etc. This eliminates the need to enter duplicate information into both Commence and Outlook.

### Configuring the Outlook Address Book

To configure Commence to be used as the Address Book in Outlook, follow the steps below: