

CONTRACT EXPRESS

How to

Set up a SharePoint Online connection in Contract Express

Overview

With Contract Express Version 8.5, you can connect to SharePoint Online to use list data as an External Table or export documents to libraries.

This guide outlines the steps to configure a connection to SharePoint Online. This must be done by an Administrator in Contract Express.

1. Set up connection in SharePoint Online

To configure a connection to Contract Express in SharePoint Online:

Set up connection

1. Go to **Azure Active Directory**.
2. In **App Registration**, add a new application and complete the following parameters:
 - Name
 - Redirect URI: select *Web* and enter `{ContractExpressURL}/dms/callback`



Don't forget to add the bit after the trailing slash in your Contract Express URL. For example:
`https://eu1.contractexpress.com/app/dms/callback`

3. Click Register.
4. In the **Certificates and Secrets** section, add a new client secret.
5. Add a description, e.g. Contract Express.
6. Make a note of the *Client Secret*. You'll need this to set up the connection in Contract Express.
7. Return to the main **Overview** page and copy the *Application (client) ID*. This is what Contract Express refers to as the *Client ID* in the next section.
8. Make a note of the *Directory (tenant) ID*. This will be used to build your SharePoint Online OAUTH API URL in Contract Express.

Set permissions

1. In **API permissions**, add a permission.
2. Select **Microsoft Graph** from the options.
3. When prompted for the type of permission, select **Delegated permissions**.
4. For connections that are to be used for Export only, select the **Sites** dropdown and tick *Sites.Manage.All*
5. For connections that are to be used for an External Table, select the **Sites** dropdown and tick *Sites.Manage.All* and *Sites.ReadWrite.All*
6. Click the *Add permissions* button.

2. Set up connection in Contract Express

To configure a connection to SharePoint Online in Contract Express:

1. Go to **Admin > Connection settings** and click the **+Add connection** button.
2. Choose *SharePoint Online* as the *Integration type*.
3. Give the connection a name to differentiate it from any other connections that are set up.
4. Enter your SharePoint Online *OAUTH API URL*, followed by your *Directory (tenant) ID*. For example:
`https://login.microsoft.com/{DirectoryTenantID}`
5. Enter the SharePoint Online *API URL*. This will be `https://graph.microsoft.com/v1.0`
6. Enter your *Client ID* and *Client Secret* copied from your Azure Active Directory page.
7. Click the **Save** button at the top of the page.



You can create multiple connections to one or more applications. Adding a connection will enable it for the entire license space.

When exporting, all users will be offered the ability to connect to each enabled connection, however they can only successfully connect to the connections for which they have valid credentials.

