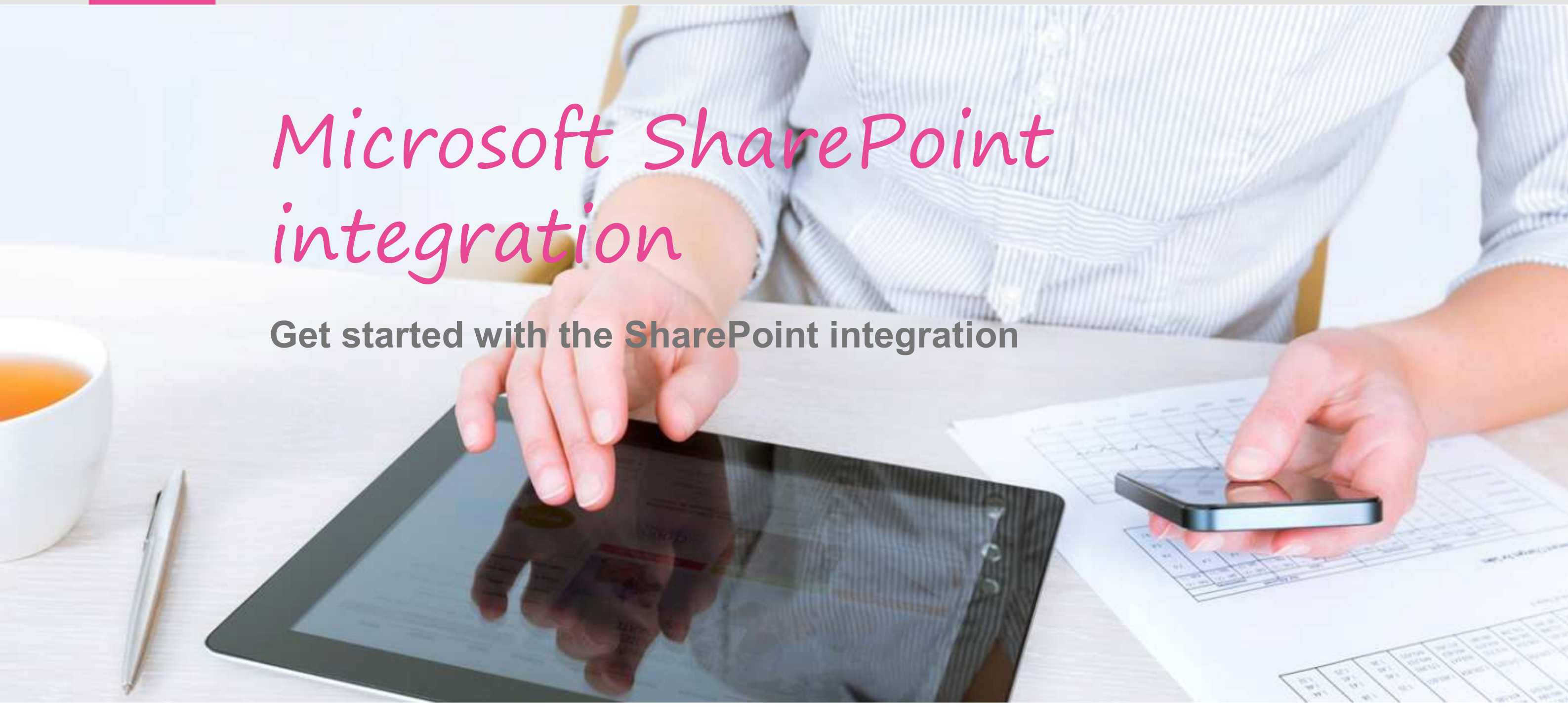

# Microsoft SharePoint integration

Get started with the SharePoint integration

# Microsoft SharePoint integration

## Get started…

You can integrate TimeLog Project and SharePoint, Microsoft's file management and knowledge sharing system for companies. This integration feature allows you to automatically create folders for customers and projects in SharePoint's document library.

SharePoint Online is the latest version of Microsoft SharePoint and part of the Microsoft Office 365 package. The TimeLog Project integration is developed for SharePoint Online, and it is quite possibly compatible with the latest SharePoint on premise versions.

This user guide is based on the English version of SharePoint Online, and as a result, menus, buttons, etc. appear in English only. We mainly use the name "SharePoint" in this guide instead of writing the full product name.

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# 1 Setting up the integration

The TimeLog Project/SharePoint integration feature requires a document library in SharePoint. Once the integration feature is activated, all folders and documents relating to projects and customers are saved in the document library.

You need to follow these five steps to create a document library:

1. Log into SharePoint and navigate to the main page, e.g. https://timelog.sharepoint.com
2. Click **Site Contents, Add an App** (see Figure 1)
3. Click **Document Library** in the apps list
4. In the pop-up, you enter TLP as name for the TimeLog library (see Figure 2 on the next page)
5. Click **Create** (see Figure 2 on the next page)

**Please note:** It is important that the document library used in the integration get the name **TLP** and that the main folder **TLP** is created in the root of the document library, e.g. https://timelog.sharepoint.com

**Figure 1**

Click the **gears -> Add an App -> Document library** to create a new document library.

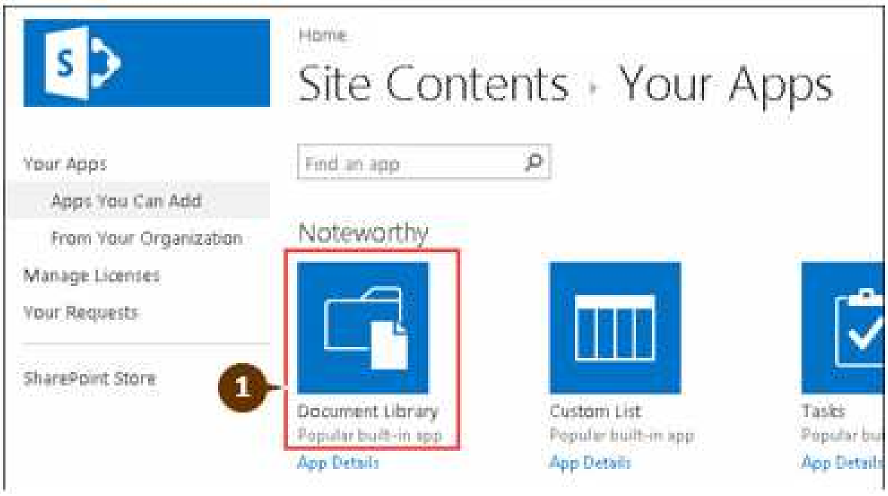
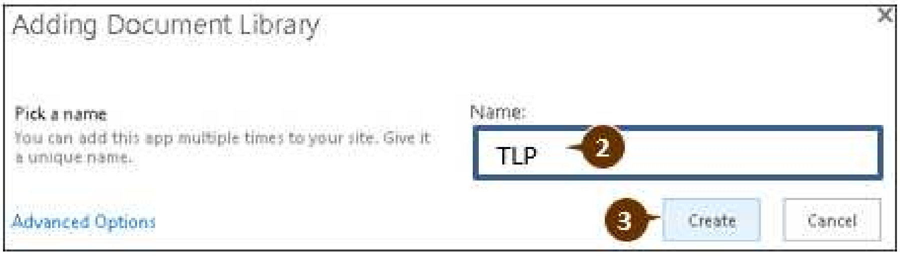


**Figure 2**

Section for creating document libraries in SharePoint Online




# 2 Integration setup

Once the SharePoint document library has been created, the integration can be activated.

You need to follow these six steps to correctly set up the integration:

1. Click **Standard integrations** in the **System Administration > Integration and API** (see Figure 3 on the next page)
2. Click the **Configuration and activation of integration** link next to SharePoint Online in the list of supported systems
3. Type in your SharePoint URL in the **Host address** field If copying the URL from your browser, delete any part of the URL after sharepoint.com (see Figure 4 on page 6)
4. Type in your SharePoint **Admin ID** and **Admin password**. The user must have at least write privileges to SharePoint document libraries. The user will then appear as the author of all folders in the TLP document library.
5. Now click **Connect** to connect to SharePoint. The **Connection** field ( in the upper right corner of the screen will turn green and indicate **"Established"** status.
6. When the connection is established, click **Activate integration** to complete the integration between TimeLog Project and SharePoint. The text in the box on the top of the page next to Integration changes to **ACTIVATED** and turns green.

Now the integration is completed and the connection is established.

7. If the connection is not successful, an error message appears, and the **Connection** field turns red. Correct the errors stated in the error message and try again.

**Please note:** The user credentials entered in the Admin-ID and Admin-password fields is the author of all folders in the TLP SharePoint document library. Individual files, however, retain their user properties. Security rights for creating new files and making them available are configured as usual in the SharePoint settings.

**Figure 3**

You find **Integration and API** on the front page in the system administration.

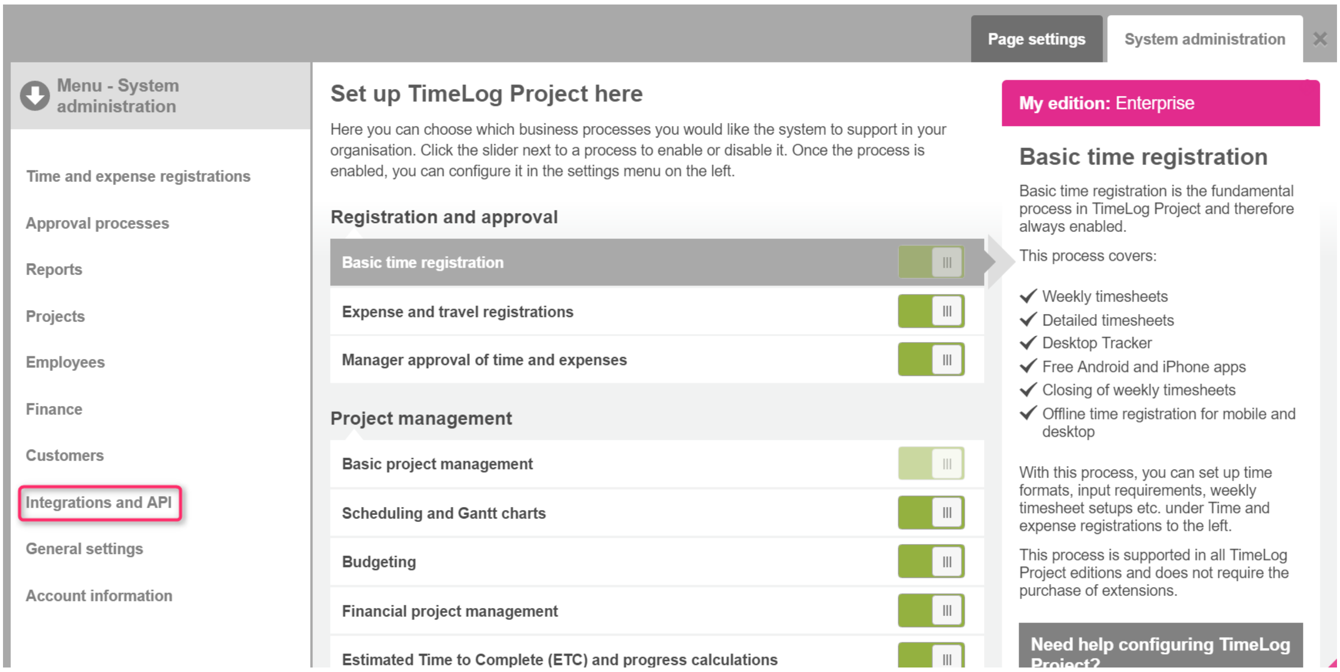
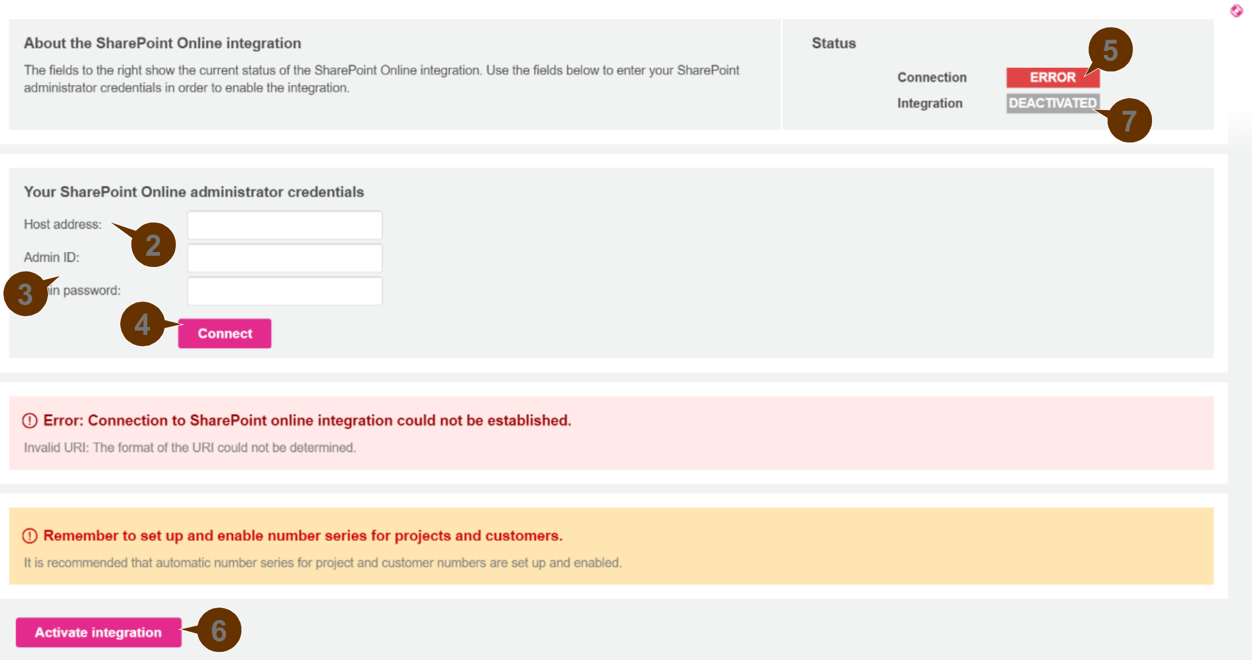


**Figure 4**

You find the setup under **Standard integrations -> SharePoint Online**.




Once activated, the integration activates a list of files relating to specific customers in SharePoint and on the customer cards found in **Customers** and in the TimeLog CRM add-on.

# 3 Access to SharePoint documents via projects

When the SharePoint integration is activated, all users with access to projects can view customer documents and subfolders available in SharePoint. They can only see the content of the files and folders and create documents, if they have the rights in SharePoint.

## 3.1 Opening a project document

Project-specific documents and subfolders are found in **Files** in the **Project details** section on all tabs, except **Settings**. You click the document or subfolder you would like to open, and the single user logs into SharePoint with his or her own user credentials.

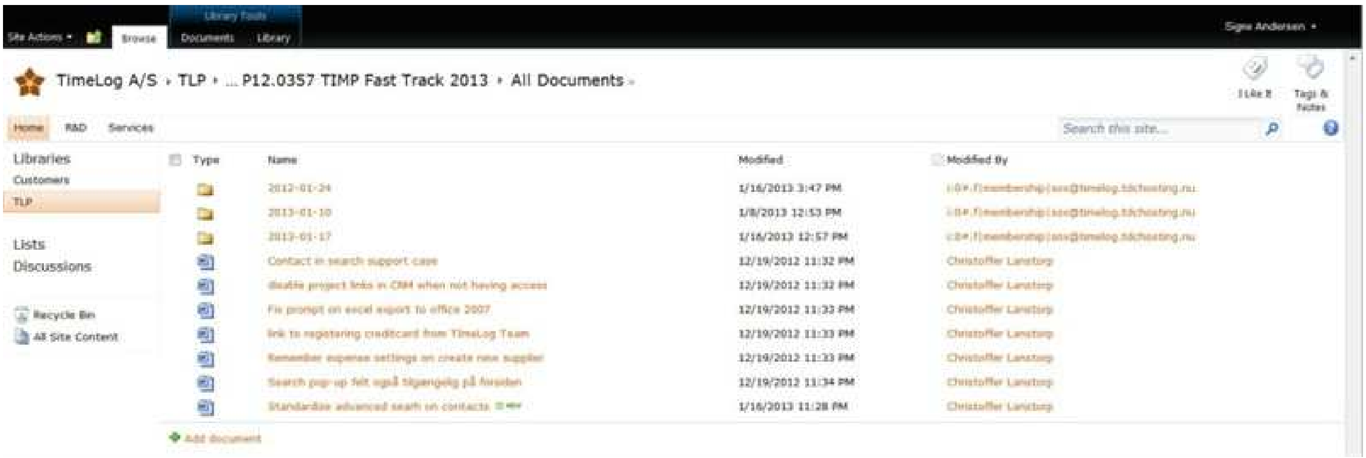
When opening a document or subfolder, you will be prompted to allow permission to access the document or subfolder, as it is located on an external server. The procedure is the same as when you work in SharePoint.

## 3.2 Linking documents to projects

You link documents to the project by clicking **Open folder** in SharePoint under **Actions** to the right. Hereafter, you log into SharePoint using your credentials; this will lead you directly to the customer's SharePoint folder.

**Figure 5**

The project folder in the TLP document library in SharePoint.




Click **Add document** in the list of documents, and select a document as usual in SharePoint. Hereafter, you go back to TimeLog Project, and refresh the page to see the new document(s) on the list.

**Please note:** Do not change the **Destination Folder** suggested by SharePoint; otherwise, the document will not show in TimeLog Project.

## 3.3 Delete a document from the list and SharePoint

If you would like to delete a document from the list and from SharePoint, click **Open folder** in SharePoint under **Actions** to the right and log into SharePoint as described above.

Check the document in question, and press the **Delete** key on your keyboard. Go back to TimeLog Project, and refresh the page.

# 4 Access to SharePoint documents via the customer card

When the SharePoint integration is activated, all users with access to Customers and TimeLog CRM can view customer documents and subfolders available in SharePoint. They can only see the content of the files and folders and create documents, if they have the rights in SharePoint.

Documents and subfolders linked to specific customers are shown under **Files** on the customer card under **Customers** and/or in TimeLog CRM.

## 4.1 Opening a customer-linked document

If you want to open a document, you click the document or subfolder you would like to open, and then log into SharePoint with your own user credentials.

When opening a document or subfolder, you will be prompted to allow permission to access the document or subfolder, as it is located on an external server. Præcis hvordan det foregår, afhænger af, hvilken internetbrowser du benytter.

## 4.2 Linking new documents to customers

If you would like to link a document fto the customer, you click **Open folder in SharePoint** under **Actions** to the right and log into SharePoint with your own credentials. Hereafter you directly access the customer's folder in SharePoint, where you click **Add document** in the list of documents, and select a document as usual in SharePoint. Go back to TimeLog Project, and refresh the page to see the new document(s) in the list.

**Please note:** Do not change the **Destination Folder** suggested by SharePoint; otherwise, the document will not show in TimeLog Project.

## 4.3 Delete a document from the list and SharePoint

If you want to delete a document, follow the instructions in 3.3 Delete a document from the list and SharePoint.

## 4.4 Updating files

Please note that the lists in TimeLog Project are updated from SharePoint once an hours, and new, edited and/or deleted files will maybe not be shown in the lists in TimeLog Project right after you make the changes in SharePoint.

### 4.4.1 If a customer/project changes name in TimeLog Project

If you change the name of a customer or a project in TimeLog Project, you must remember to change the folder name in SharePoint. This is not done automatically via the integration, so the link to SharePoint is broken, if the folder names do not match. If you select to create a new folder, and you still want access to the old files, you must remember to copy the files to the new folder in SharePoint, so you can see them in the customer or the project in TimeLog Project.