SyncSpace

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Installation manual | SyncSpace 2.0



Introduction

This manual provides a detailed step-by-step guide to installing and configuring the SyncSpace solution.

Each step is described in detail, with the aim of making the process easier for users who are carrying out the installation for the first time.

Note: We would like to remind you of the requirements necessary for installation: Access to SharePoint Online is required. Login Prompt: During the installation process, a Microsoft 365 login prompt will appear Premium Power Automate License; App Catalog is required; O365 E3 + Mailbox License Installation takes between 15 and 30 minutes, depending on internet speed. Each user must have the respective license with access to SharePoint, Mailbox, and Teams in order to use SyncSpace.

Installer

A	pplication In	stall - Secu	rity Warning	×	
))	Do you wan	t to install	this application?	₽	
	Name: SyncSp. From (H storage Publishe Armis -	ace lover over .syncspace er: Sistemas d	the string below to see the full domain): hub.com <u>e Informação Lda</u>		
	(3%) Inst	talling Sy	ncSpace —		×
	Installi This duri	n g SyncS s may tak ing the in	pace e several minutes. You can use your computer to do other ta: stallation.	sks	1
	5	Name:	<u>SyncSpace</u>		
		From:	storage.syncspacehub.com		
		Downlo	ading: 6.53 MB of 186 MB		
				Car	ncel

When you click on the install link, authorise the installation on the desired machine. This should be a quick process, but it will depend on your internet connection.



Beginning the Installation

The first step is to start the installation process.

1. Click on 'Start Installation'.

These steps will start the solution installation process.

Note: In the initial installation menu you can also consult past installations and release notes.

SyncSpace Installer SyncSpace Home > Settings > Enterprise Application Settings for SyncSpace PnP Management Shell * Provide a PnP Management Shell ID * e.g., 31359c7f-bd7e-475c-86db-fdb8c937548e Tenant ID * e.g., 0000000-0000-0000-0000-00000000000 Home > App registrations > PnP Rocks 🖉 … Back Delete 🕀 Endpoints 💀 Preview features ₽ Search Noverview Got a second? We would love your feedback on Microsoft identity

Quickstart 🚀 Integration assistant ∧ Essentials X Diagnose and solve problems Display name PnP Rocks Manage Application (client) ID 3 8619a786-c466-4d73-9bf4-ae65b7168c67 Branding & properties Object ID

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PnP Management Shell

If you get this screen, it means that you need to register your own Entra ID Application to use with PnP PowerShell.

1. Follow the process to register an Entra ID Application to use with PnP PowerShell: 'https://pnp.github.io/powershell/articles/registerapplication.html#automaticallycreate-an-app-registration-for-interactive-login'

2. Once you have registered your own Entra ID Application to use with PnP PowerShell, enter this information in the corresponding fields.

3. Copy the 'PnP Management Shell ID'

SyncSpace Installer				>	<
S Sync	Space				
Home > Settir	ngs > Enterprise A	pplication			
Settings fo	r SyncSpace				
PnP Managem	ent Shell *				
Provide a PnP e.g., 31359c7f-bo	Management She d7e-475c-86db-fdb8	ell ID * c937548e			
Tenant ID * e.g., 0000000-0	000-0000-0000	00000000			
Back	Overview	Monitoring	Properties	Recommendations	Setup guides
		your tenant			
	Basic inform	ation			
	Name		Contoso		
	Tenant ID	1-	310f57f2-9fdf	-4c70-a190-6908298e21ca	D

PnP Management Shell

1. Next, copy the 'Tenant ID'

Note: You can find 'Tenant ID' on this URL -

https://portal.azure.com/#view/Microsoft_AAD_IAM/ActiveDirectoryMenuBlade/~/Overview



Installation Method

- 1. Choose the 'Install' method if this is the first time you are installing the solution.
- 2. You can also choose to 'Update ' a previously installed version of SyncSpace.
- **3.** The last option refers to the installation of the Power Platform.
- 4. The last option refers to PnP Management Shell.



SharePoint Site

Creation of Syncspace site on Sharepoint:

1. Select **'Yes'** if there is already a SharePoint site created for SyncSpace. Otherwise, you should choose **'No'**. You can find more information on the next slide.

2. If you have selected 'Yes' you will need to enter the SharePoint url address for the Syncspace site.

3. Click on 'Next' to continue.



SharePoint Site

1. If there isn't already a SharePoint created for SyncSpace, you should choose the **'No'** option.

2. In the first 'Sharepoint tenant url' field, enter the address of your tenant 'https://mytenant.sharepoint.com'.

3. In the **'Site Name'** field, fill in the space with the name you want for your site, for example **'SyncSpace'**.

4. Click on 'Next' to continue.



App Catalog

If you get the following message, it means that you don't have an active app catalogue in your Sharepoint account.

On the next slide we'll explain how to activate the app catalogue and proceed with the installation.

https://m365x85701887-admin.sharepoint.com/ lavouts/15/online/AdminHome.aspx#/classicFeature Contoso Electronics SharePoint admin center \equiv More features ல் Home Access familiar features from the classic SharePoint admin center Sites Active sites Search User profiles Apps Deleted sites Add and remove admins for a user's OneDrive, Help users find what they're looking for. Learn Configure SharePoint Store settings, monitor app disable OneDrive creation for some users, and more about search usage, manage app licenses, and more. Learn more Containers more. Learn more about user profiles about apps 🚔 Policies Settings Open Onen Content services ↔ Migration └── Reports Secure store Records management InfoPath Create and set the credentials for Target Manage records in a Records Center site that serves Enable browser-based InfoPath forms. Learn more 2 More features Applications used for BCS connections, Learn more as an archive. Learn more about records about InfoPath about secure store Advanced management PRO Open Open Open Customize navigation Show all

Creating App Catalog

1. If you don't have a Sharepoint app catalogue, you'll have to create one, as it needs to be active in your tenant in order to use SyncSpace. Create it using this link: **'https://mytenant-admin.sharepoint.com/'**

- 2. In the side menu, select the 'More Features' option.
- 3. On the more features page, in the 'Apps' option, click on the 'Open' button.

Following the steps above, you should have successfully created the sharepoint app catalogue. You can now return to the Syncspace installer.

SharePoint Access



- CONTOSO demo

Sign in

Sorry, but we're having trouble signing you in.

AADSTS700016: Application with identifier '31359c7f-bd7e-475c-86dbfdb8c937548e' was not found in the directory 'Contoso'. This can happen if the application has not been installed by the administrator of the tenant or consented to by any user in the tenant. You may have sent your authentication request to the wrong tenant.

Contoso

Troubleshooting details

If you contact your administrator, send this info to them. Copy info to clipboard

Request Id: efcb9d9f-56ab-4e1d-a231-3dae28164f00 Correlation Id: 7a5d851c-99a8-4abe-b628-5d8c870b7387 Timestamp: 2024-09-30T14:33:28Z

Message: AADSTS700016: Application with identifier '31359c7f-bd7e-475c-86db-fdb8c937548e' was not found in the directory 'Contoso'. This can happen if the application has not been installed by the administrator of the tenant or consented to by any user in the tenant. You may have sent your authentication request to the wrong tenant.

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Flag sign-in errors for review: Enable flagging

If you plan on getting help for this problem, enable flagging and try to reproduce the error within 20 minutes. Flagged events make diagnostics available and are raised to admin attention.

PnP Management Shell

If you get the following message, it means that your **'Entra ID Application'** to use with PnP PowerShell or **'Tenant ID'** is not correct.

Check Setup SyncSpace PnP and try again.

Validating your Account

Microsoft Pick an account (2) - CONTOSO demo MOD Administrator Ř admin@m365x66731409.onmicrosoft.com admin@M365x59669044.onmicrosoft.com : Signed in Aprovar pedido de início de sessão + Abra a aplicação Authenticator e introduza o Use another account número apresentado para iniciar sessão. 47 CONTOSO demo Não há números na sua aplicação? Certifique-se de 1 que atualiza para a versão mais recente. ← admin@m365x66731409.onmicrosoft.com Neste momento, não posso utilizar a minha aplicação Microsoft Authenticator Introduzir palavra-passe Esqueci-me da palavra-passe Contoso Contoso

1. Log in using your tenant's administration credentials.

2. After validating your identity, you can return to the installer and continue installing the SyncSpace site on your Sharepoint.

SyncSpace Installer × SyncSpace Home > Select Method > Install > Configure Language installation Select additional languages The default installation language is English. Additional languages can be added to solution. N BR PT Select default language Even if you select another language as the default, [SyncSpace Installer O EN SyncSpace Home > Select Method > Install > Configure Language installation Select additional languages The default installation language is English. Additional languages can be added to solution. Back BR 🔽 PT 2 Select default language Even if you select another language as the default, English will also be installed O EN O BR O PT 3 Back Start Installation

Language of Installation

At this stage you should select the language(s) you want to install.

- **1.** English (EN) is mandatory for installation.
- 2. You can choose other languages (PT or BR).

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3. Even if the user chooses only one additional language, English (EN) will be chosen as the default, but both languages will be installed.

4. When the user chooses more than one language to install, the languages for selecting the default language appear below.

After selecting the languages, click on 'Start Installation'.



Installation

SyncSpace will now install the site on your sharepoint. This process may take some time, as there are some packages with a lot of information.

Depending on your internet speed, the estimated time to complete the installation may vary between 15 and 30 minutes.

Note: When the installation reaches 40 per cent, the process may seem slow for a while, but this is normal. Don't worry, the installation is in progress, this is because the largest component of SyncSpace is being installed at the moment. We remind you not to close the window during the installation process. SyncSpace Installer

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SyncSpace

Power Platform installation

e.g., https://abcdef.crm12.dynamics.com

1. Access to Power Apps (https://make.powerapps.com/)

Choose the target environment and select to view the details
 Copy the Environment URL

Home > Select Method > Install > Power Platform installation

Provide a Power Platform environment URL where SyncSpace will be installed *

Power Platform Installation *

Once you have finished installing the SyncSpace package, you need to install the Power Platform.

 Before you start installing the Power Platform solution, you need to enter the url of your Power Platform environment.
 If you don't have an environment created for Syncspace on the Power Platform, you'll need to create a new one.

2. To do this, go to the website 'https://make.powerapps.com/'. The following slides provide more information.

(i) Manual Instructions

Back

2. Access to Admin Center

3. Select Environments

Next



Creating a New Environment

Remember that you must have a Power Automate Premium account associated with the application service account you use when installing SyncSpace.

1. In the side menu, select the 'Power Platform' option, when the sub-menu opens, click on the 'Power Platform Admin Center' button.

2. On the Power Platform admin page in the side menu click on the 'Environment' button.

3. After entering the enviroment page, we recommend that you create a new enviroment. Click on **'New'** in the top menu to create a new enviroment.

New environment	×				
(i) This operation is subject to <u>capacity</u>	<u>y constraints</u>				
Name * syncspace					
Make this a Managed Environm	nent (i)				
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Creating a New Enviroment

- 1. In the 'New Enviroment' tab, do the following:
 - > Enter the desired 'Name' for the enviroment, for example 'syncspace'
 - > Select the 'None' option in the 'Group'.
 - > Select your 'Region'
 - > The 'Type' field, choose 'Production'.
 - > Then click on the 'Next' button.
- 2. In the 'Add Dataverse' tab, please proceed as follows:
 - > In the 'Language' field, choose your language
 - > In the 'Currency' field, select your currency.
 - > In the 'Url' field, you can create a specific url, for example: 'syncspace'.
 - > Then click on the 'Save' button.

3. After this configuration you will return to the environments menu and wait for your status to become 'Ready'. When the configuration is complete, click on your Environment.

4. Copy the Url that will be needed to install SyncSpace.



Checking the URL Environment

Remember that you must have a Power Automate Premium account associated with the application service account you use when installing SyncSpace.

1. In the side menu, select the 'Power Platform' option, when the sub-menu opens, click on the 'Power Platform Admin Center' button.

2. On the Power Platform admin page in the side menu click on the 'Environment' button.

3. After entering the enviroment page, we recommend that you create a new enviroment. Click on **'New'** in the top menu to create a new enviroment.

Х Home > Select Method > Install > Power Platform installation **Power Platform installation** Provide a Power Platform environment URL where SyncSpace will be installed * e.g., https://abcdef.crm12.dynamics.com

1. Access to Power Apps (https://make.powerapps.com/) 2. Access to Admin Center 3. Select Environments 4. Choose the target environment and select to view the details 5. Copy the Environment URL

(i) Manual Instructions

SyncSpace Installer

SyncSpace

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Power Platform Installation

- 1. Once you have the url of your enviroment, enter it in the URL field.
- 2. After entering the url, click on 'Next'.

You will then be asked to enter the default email address for sending notifications. We recommend that you use the email address of the application service account used to install SyncSpace. Automatic emails will be sent via this email address. If this application service account has permissions to send emails via another mailbox, you can use the name of the mailbox. Ex: syncspace@mytenant.com.

Note: Once the installation is complete, you can set up a new email for notifications if you wish.

Check Access

SyncSpace Installer SyncSpace Home > Select Method > Install > Power Platform installation > Configuration > Sign in Power Platform environment access Access to Power Platform environment is required, Microsoft 365 login prompt will open during the process To have access to your Power Platform environment - to create, get or update Power Platform solutions - an administrator account is required in order to proceed with the installation. A login page from Microsoft 365 will be shown and you need to enter your credentials. Please ensure the following requirements: - Your account needs to have administrator role with permssions to import and install Solutions in your Power Platform environment, otherwise the installation cannot be completed. Please note, the credentials will not be stored or intercepted in anyway or anytime. SyncSpace will be installed using the following Power Platform environment: https://syncpsace-power-platform.crm4.dynamics.com Back Check Access

The installer will ask you to confirm your identity in order to proceed with the installation.

1. Click on 'Check Access'.

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> A login screen will then open, in which you will need to enter your details.

Note: We remind you that we do not store sharepoint login details.

Package Installation Completed

SyncSpace Installer
 SyncSpace
 Home > Select Method > Install > Installation Completed
 Installation Completed
 SyncSpace installation was completed successfully
 Final configuration step is now required.
 The next step is required to complete the SyncSpace Power Platform solution configuration.
 In the next step you will configure all connections and could flows.
 Please follow the link below to start the required configuration.

At this stage the installer, after carrying out the installation, will ask you to configure your connections.

1. To move on to the next menu, select the 'Start Configuration' option

Note: Remember that the connections must be configured to finalise the SyncSpace installation.



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Connections Configuration

The Installer needs you to configure your connections in order to proceed.

1. Click on **'Open'** and you will be redirected to Sharepoint where you will configure the connections needed to proceed with the installation.

2. Once the connections have been configured, you should reload.

3. If all the settings are 'Yes' you can click on the 'Next' button

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Connections Configuration

After being redirected to the Sharepoint configuration page, please proceed as follows:

- 1. In the side menu, choose 'Back to Solutions'.
- 2. In the Center area click on the 'Default Solution' link.

3. In the **'Objects'** drop-down menu, click on the **'Connection References'** option to start configuring your connections.

! ATTENTION !

This step is crucial to finalising the SyncSpace installation. In the following slides you'll find a detailed explanation of how to make each of the 6 connections necessary for the software to work.

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		SQL Server Microsoft	Premium	Standard	

Setting up Approvals

1. Choose the 'WPH.CR.Approvals' connection in the center menu by selecting the 'edit' option.

2. In the right-hand menu, select 'Connection' and opening the sub-menu, click on the '+ New Connection' button.

3. On the new page, in the top right-hand corner in the **'Search'** field, type **'Approvals'** to find the **'Approvals'** Connector.



Setting up Approvals

1. Click on the 'Approvals' connection.

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C) Refresh

Close

2. Select 'Create', you may need to authenticate yourself to create the connection, once the connection has been created you can close this window, please go back to the edit panel of the 'WPH.CR.Approvals' connection.

3. In the side menu of the 'WPH.CR.Approvals' connection, refresh the connection and select the new connection you have created.

4. After selecting the connection click on the **'Save'** button and to finalise the connection select **'Save Changes'** in the pop-up that will open.

Note: Once this process is complete, you have successfully created the Microsoft 'Approvals' connection, you can go back to the installer and reload, it should now appear as 'Yes' in the Configured column. If you close the SharePoint window or click on the 'Open' button in the installer, you will be redirected to a new SharePoint page. To proceed with configuring the connections, follow the instructions on page 22.



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			SQL Server Microsoft Premium		Standard

Setting up Teams

1. Choose the 'WPH.CR.Microsoft Teams' connection in the center menu, select the 'Edit' option.

2. In the right-hand menu, select 'Connection' and open the sub-menu, then click on the '+ New Connection' button.

3. On the new page, in the top right-hand corner in the **'Search'** field, type in **'Microsoft Teams'** and click enter.



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Microsoft Teams

Team workspace with Microsoft 365.



Edit WPH.CR.MicrosoftTeams ×

Setting up Teams

1. Click on the 'Microsoft Teams' connection

2. Select 'Create', you may need to authenticate yourself to create the connection, once the connection has been created you can close this window.

3. In the side menu of the 'WPH.CR.Microsoft Teams' connection, refresh the connection and select the new connection you have just created.

4. After selecting the connection click on the 'Save' button and to finalise the connection select 'Save Changes' in the pop-up that will open.

Note: Once this process has finished creating the Microsoft Teams connection, you can return to the installer and reload it; it should now appear in the Configured 'Yes' status.

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Setting up Office 365 Groups

1. Choose the 'WPH.CR.Office365Groups' connection in the Center menu, select the 'Edit' option.

2. In the right-hand menu, select 'Connection' and open the sub-menu, click on the '+ New Connection' button.

3. On the new page, in the top right-hand corner in the 'Search' field type 'Office 365 Groups' and click enter.



Setting up Office 365 Groups

1. Click on the 'Office 365 Groups' connection.

Close

2. Select 'Create', you may need to authenticate yourself to create the connection, once the connection has been created you can close this window.

3. In the side menu of the 'WPH.CR.Office365Groups' connection, refresh the Connection and select the new connection you have just created.

4. After selecting the connection click on the 'Save' button and to finalise the connection select 'Save Changes' in the pop up that will open.

Note: Once this process has finished creating the Office 365 Groups connection, you can return to the installer and reload it, it should now appear in the Configured 'Yes' status.

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Setting up Office 365 Outlook

1. Choose the 'WPH.CR.Office365Outlook' connection in the center menu, select the 'Edit' option.

2. In the right-hand menu, select 'Connection' and open the sub-menu, click on the '+ New Connection' button.

3. On the new page, in the top right-hand corner in the 'Search' field type 'Office 365 Outlook' and click enter.



Setting up Office 365 Outlook

1. Click on the 'Office 365 Outlook' connection

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2. Select 'Create', you may need to authenticate yourself to create the connection, once the connection has been created you can close this window.

3. In the side menu of the 'WPH.CR.Office365Outlook' connection, refresh the connection and select the new connection you have just created.

4. After selecting the connection click on the 'Save' button and to finalise the connection select 'Save changes' in the pop-up that will open.

Note: Once this process has finished creating the Office 365 Outlook connection, you can return to the installer and reload it; it should now appear in the configured 'Yes' status.



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Setting up Office 365 Users

1. Choose the 'WPH.CR.Office365Users' connection in the center menu, select the 'Edit' option.

2. In the right-hand menu, select 'Connection' and open the sub-menu, click on the '+ New Connection' button.

3. On the new page, in the top right-hand corner in the 'Search' field type 'Office 365 Users' and click enter.

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Setting up Office 365 Users

1. Click on the 'Office 365 Users' connection

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2. Select 'Create', you may need to authenticate yourself to create the connection, once the connection has been created you can close this window.

3. In the side menu of the 'WPH.CR.Office365Users' connection, refresh the connection and select the new connection you have just created.

4. After selecting the connection click on the 'Save' button and to finalise the connection select 'save changes' in the pop-up that will open.

Note: Once this process is complete, you have successfully created the Microsoft 'Office 365 Outlook' connection, you can go back to the installer and reload, it should now appear as 'Yes' in the Configured column. If you close the SharePoint window or click on the 'Open' button in the installer, you will be redirected to a new SharePoint page. To proceed with configuring the connections, follow the instructions on page 22.

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Setting up Sharepoint

1. Choose the 'WPH.CR.Sharepoint' connection in the center menu, select the 'Edit' option.

2. In the right-hand menu, select 'Connection' and open the sub-menu, then click on the '+ New Connection' button.

3. On the new page, in the top right-hand corner in the **'Search'** field, type **'Sharepoint'** and click enter.



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Activate Windows

Close



Connect directly (cloud-services)
 Connect using on-premises data gateway (?)



Setting up Sharepoint

1. Click on the 'Sharepoint' connection

2. Select the 'Connect Directly' option and click on the 'Create' button, you may need to authenticate yourself to create the connection, once the connection has been created you can close this window.

3. In the side menu of the **'WPH.CR.Sharepoint'** connection, refresh the Connection and select the new connection you have just created.

4. After selecting the connection click on the 'Save' button and to finalise the connection select 'Save changes' in the pop-up that will open.

Note: Once this process is complete, you have successfully created the Microsoft 'SharePoint' connection, you can go back to the installer and reload, it should now appear as 'Yes' in the Configured column. If you close the SharePoint window or click on the 'Open' button in the installer, you will be redirected to a new SharePoint page. To proceed with configuring the connections, follow the instructions on page 22.



Activating Flows

X

The installer needs you to activate Cloud Flows to complete the SyncSpace installation.

To complete this step, click on the 'Activate' button; this process may take a few minutes. At the end of the activation, the status of all the flows will change to 'Yes' and the 'Next' button will become active.

2. Check that all the 'Flows' are active, in which case click 'Next' to move on to the last step of your installation.

3. After activation, click 'Next' to finalize this step.

Finish the Installation

Your SyncSpace installation is finished.

1. In this option you can click **on 'Open SyncSpace backoffice'** and you will be redirected to the backoffice page of your syncspace site, keeping the installer closed.

2. The 'Finish' option will complete the installation and return you to the start menu, in which case you will also be directed to the SyncSpace backoffice page.

Note: In the BackOffice enter your licence key to activate SyncSpace. If you haven't purchased a licence you can click on Free Trial to try SyncSpace for a period of 15 days.

Congratulations, you have successfully completed the installation of SyncSpace!

SyncSpace Installer

SyncSpace

Home > Select Method > Check Power Platform configuration > Setup Completed

Power Platform Setup Completed

Power Platform setup was completed successfully

Final Step

Congratulations!

You are a step closer to have your SyncSpace fully working. Please access to SyncSpace backoffice page to activate your license and manage your application settings





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SyncSpace