SyncSpace

Installation manual | SyncSpace 2.0

v1.0

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

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.
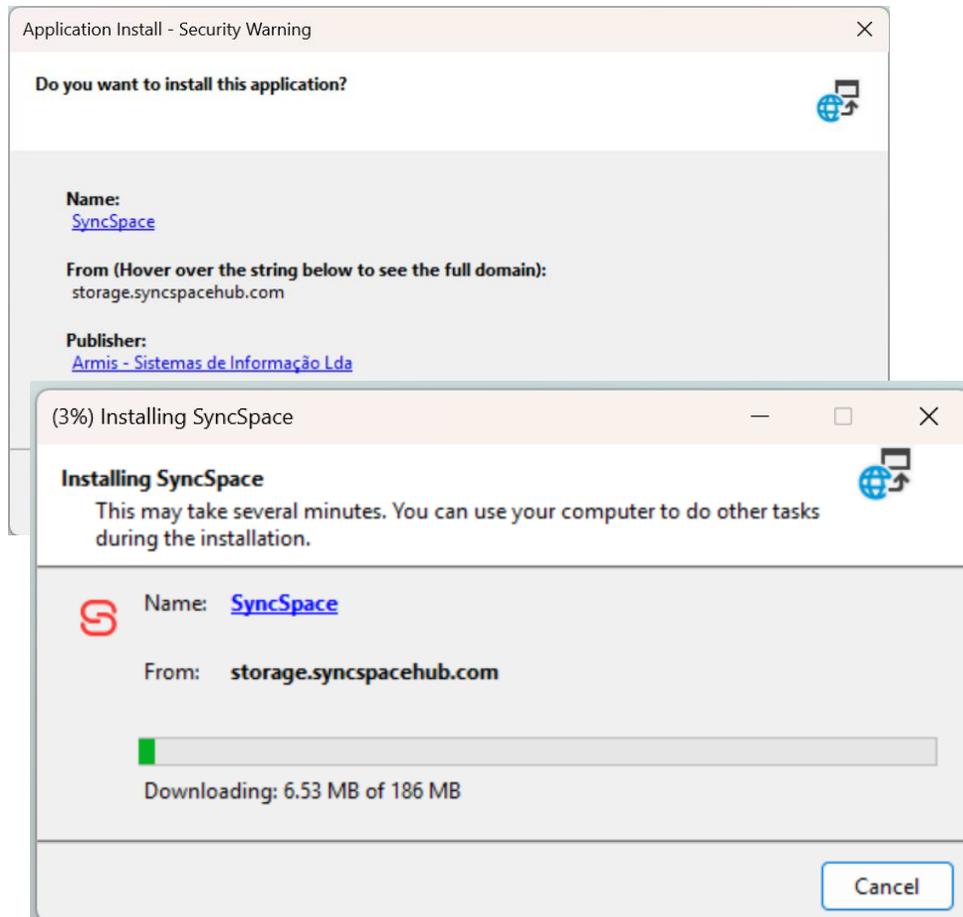
Beginning the Installation
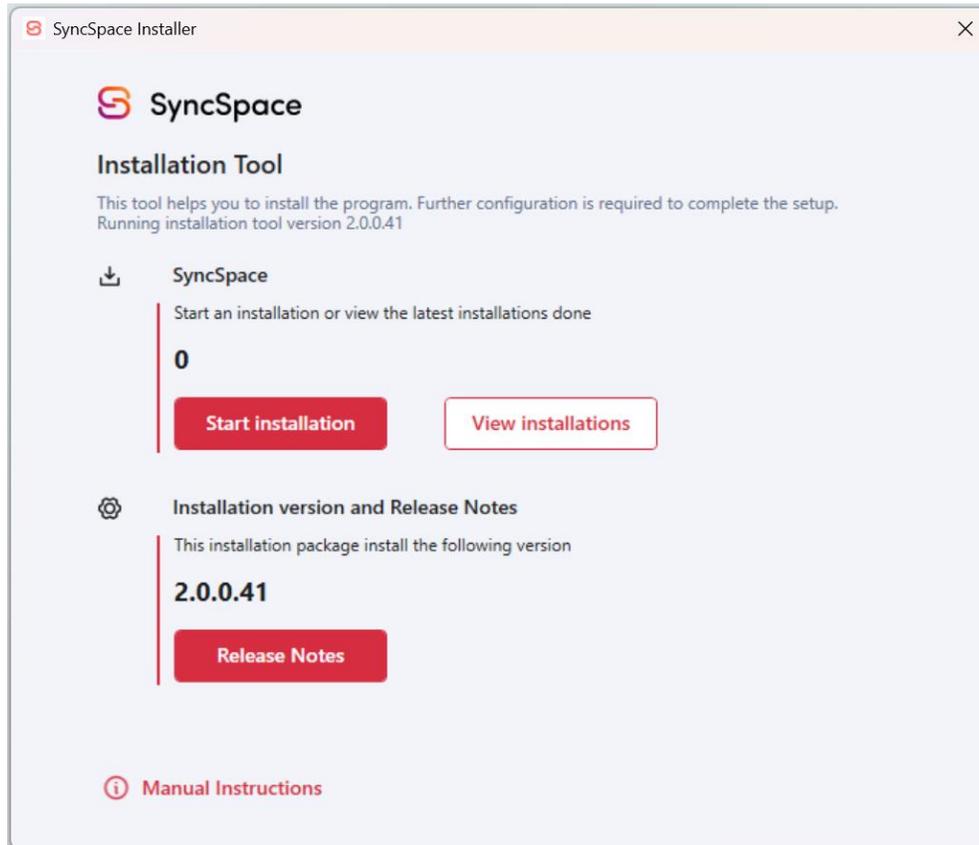
The first step is to start the installation process.

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.

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#automatically-create-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'**

PnP Management Shell

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., 00000000-0000-0000-0000-000000000000

[   ]

Back

| Overview | Monitoring | Properties | Recommendations | Setup guides |

🔍 Search your tenant

Basic information

Name   Contoso

Tenant ID   ①   310f57f2-9fdf-4c70-a190-6908298e21ca ⎘

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
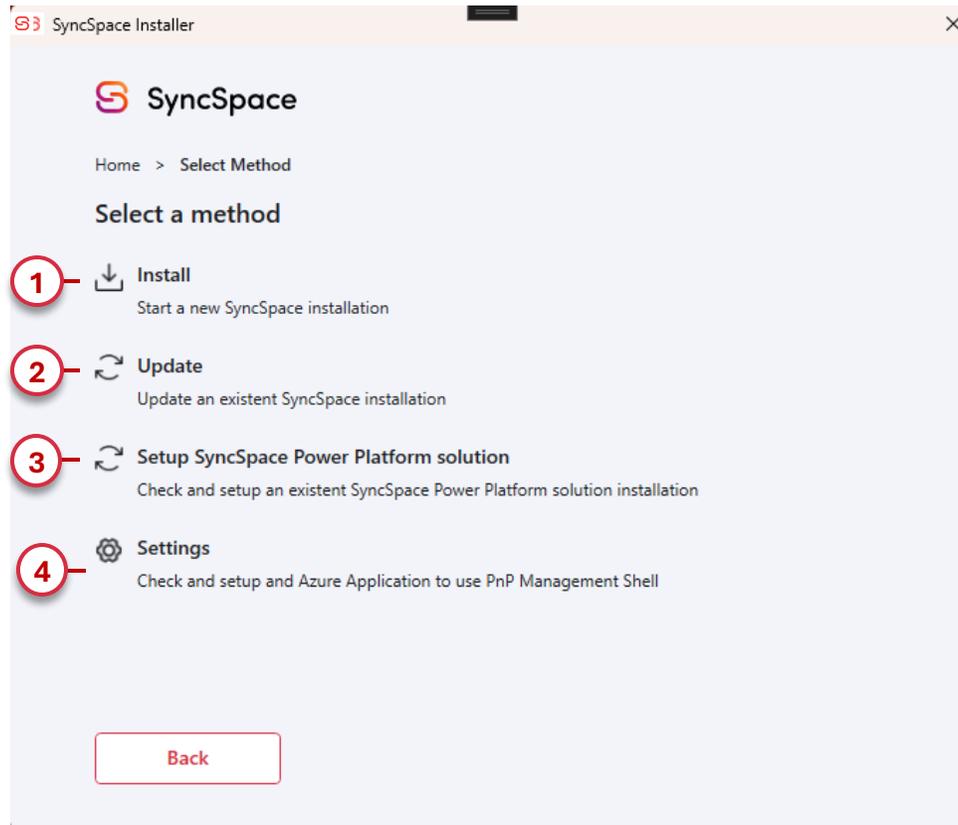
1. Choose the '**Install**' method if this is the first time you are installing the solution.

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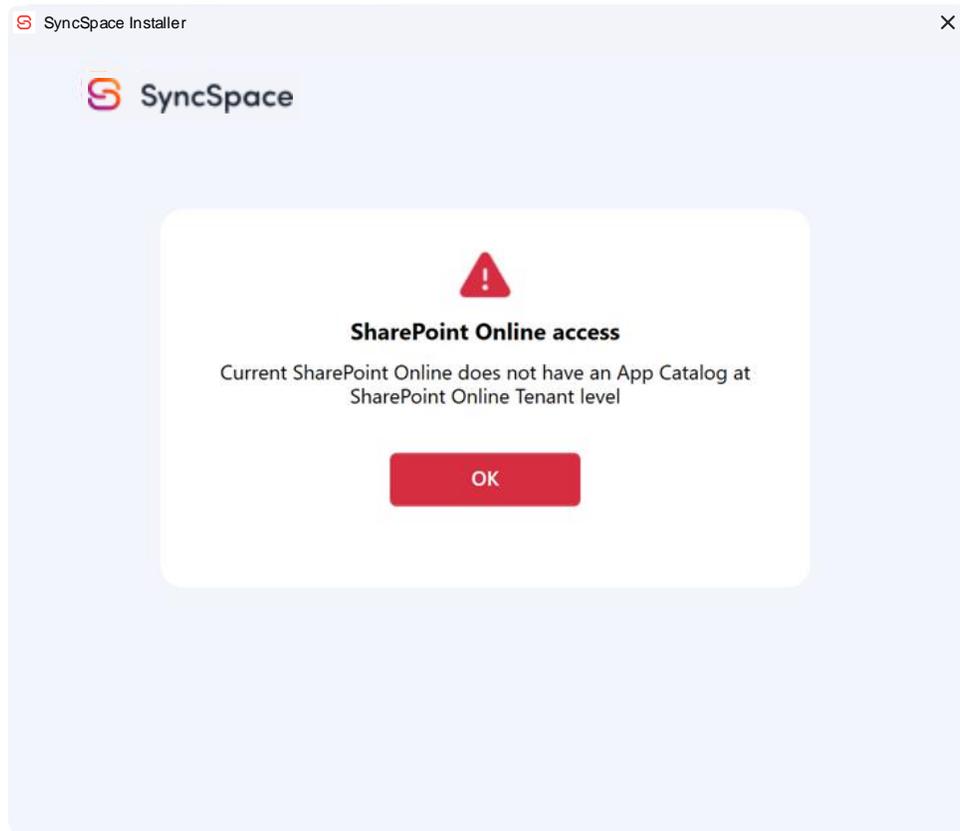
Creating App Catalog
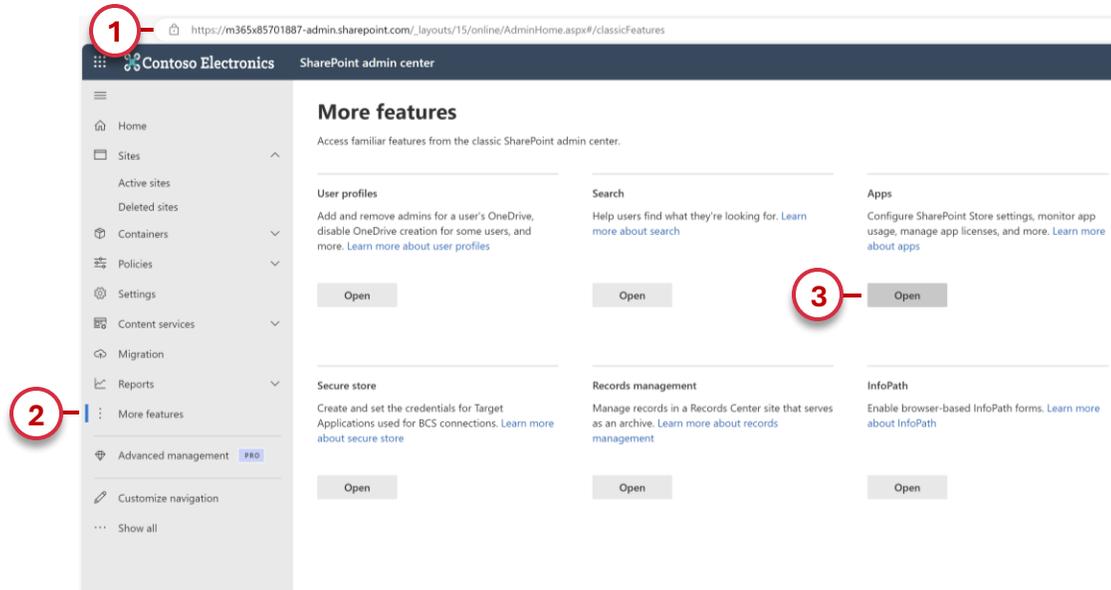
1. If you don't have a Sharepoint app catalogue, you'll have to create one, as it needs to be active in your tenant in order to use SyncSpace. Create it using this link: **'https://mytenant-admin.sharepoint.com/'**

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

Syncspace will ask you to confirm your identity:

1. Click on '**Check Access**'.

2. A login screen will then open: Enter your account details to confirm your identity.

Note: Remember that we do not store sharepoint login details.

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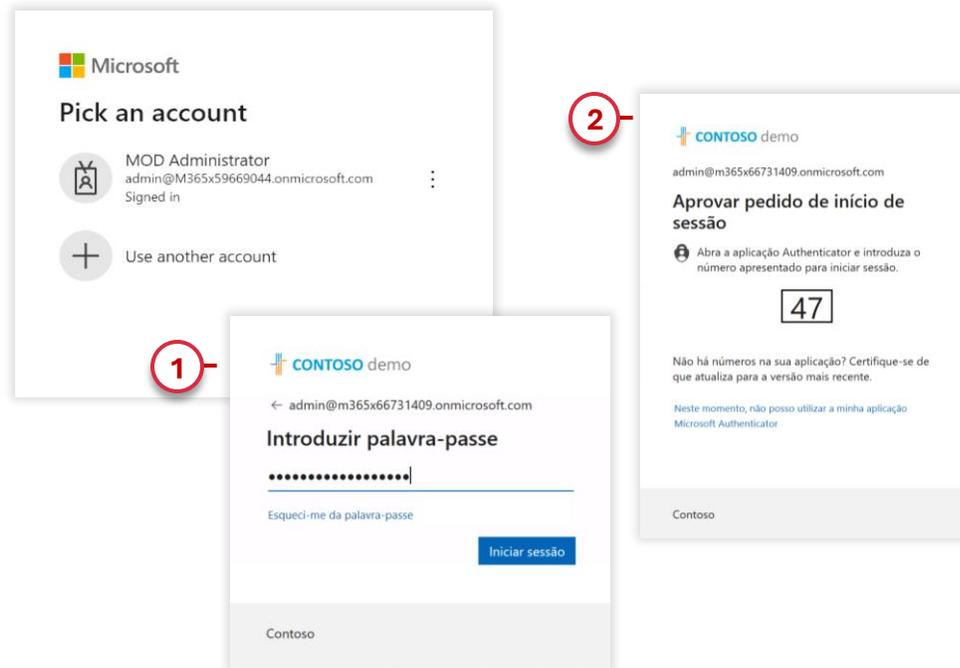
1. Log in using your tenant's administration credentials.

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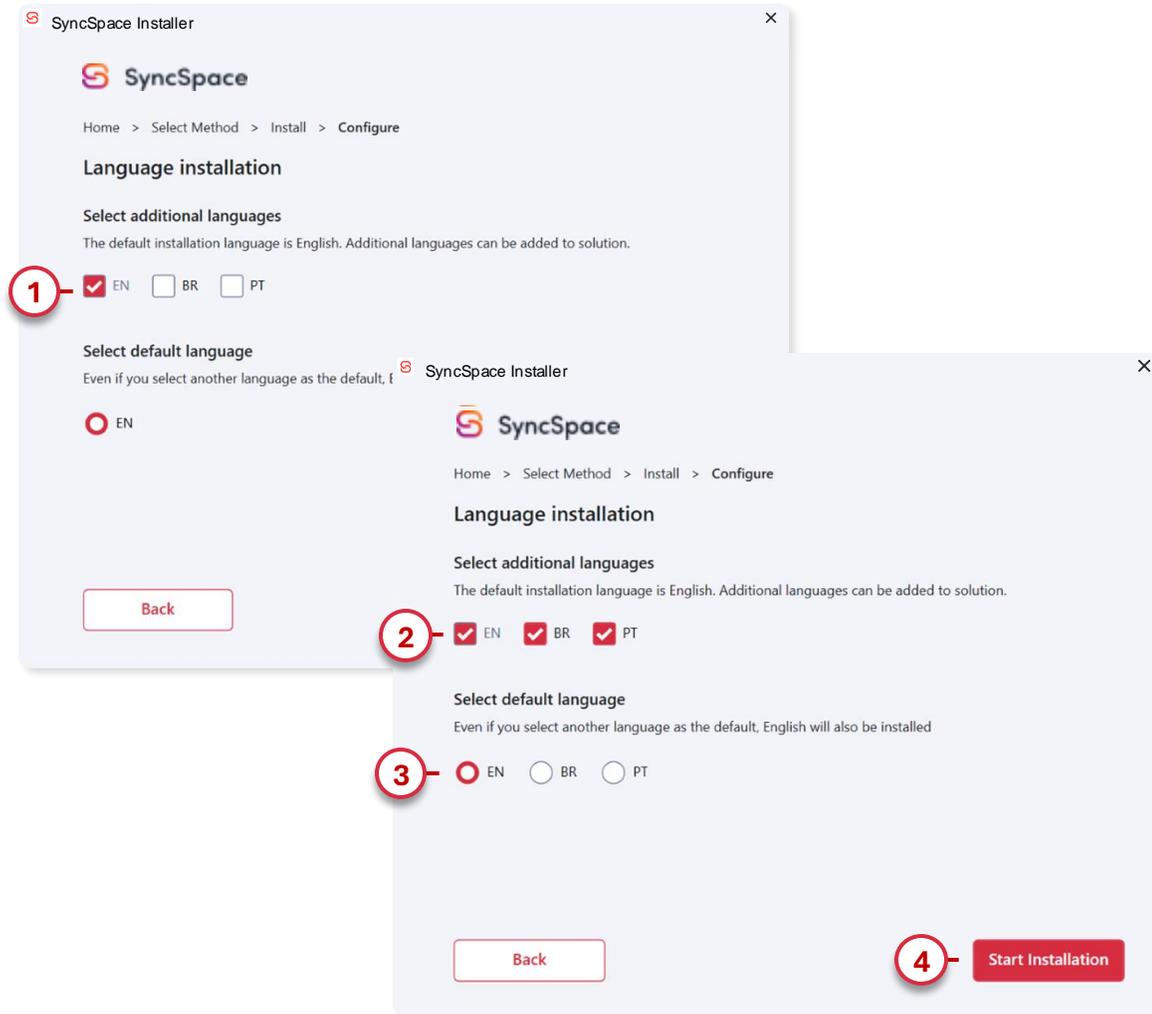
Language of Installation

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).

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   ✕

SyncSpace

Home > Select Method > Install > Configure > **Installing**

Installing SyncSpace

This installlation may take a few minutes.

5%

Creating SharePoint site with name SyncSpace

Leave
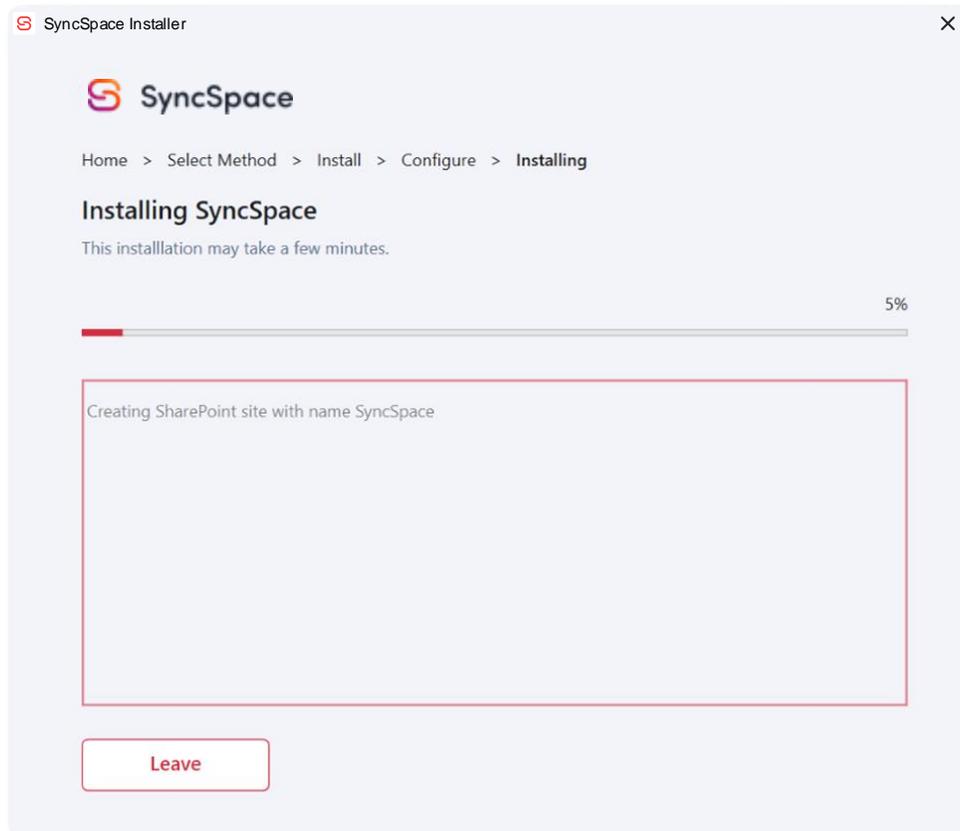
Power Platform Installation

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

1. 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.
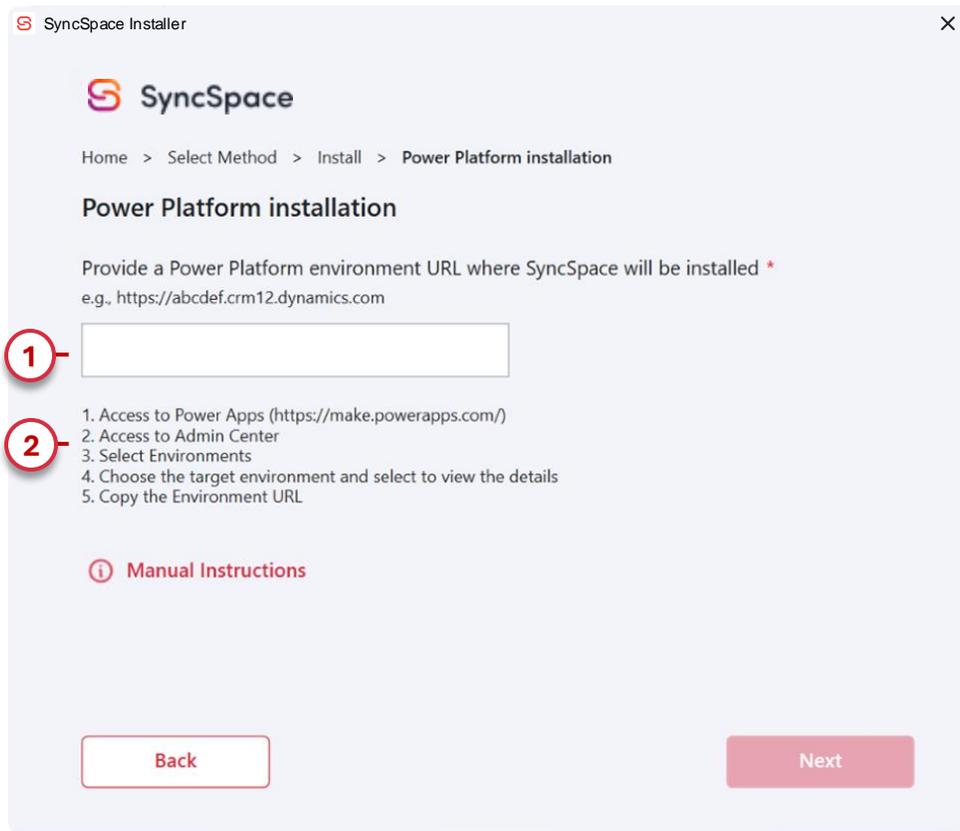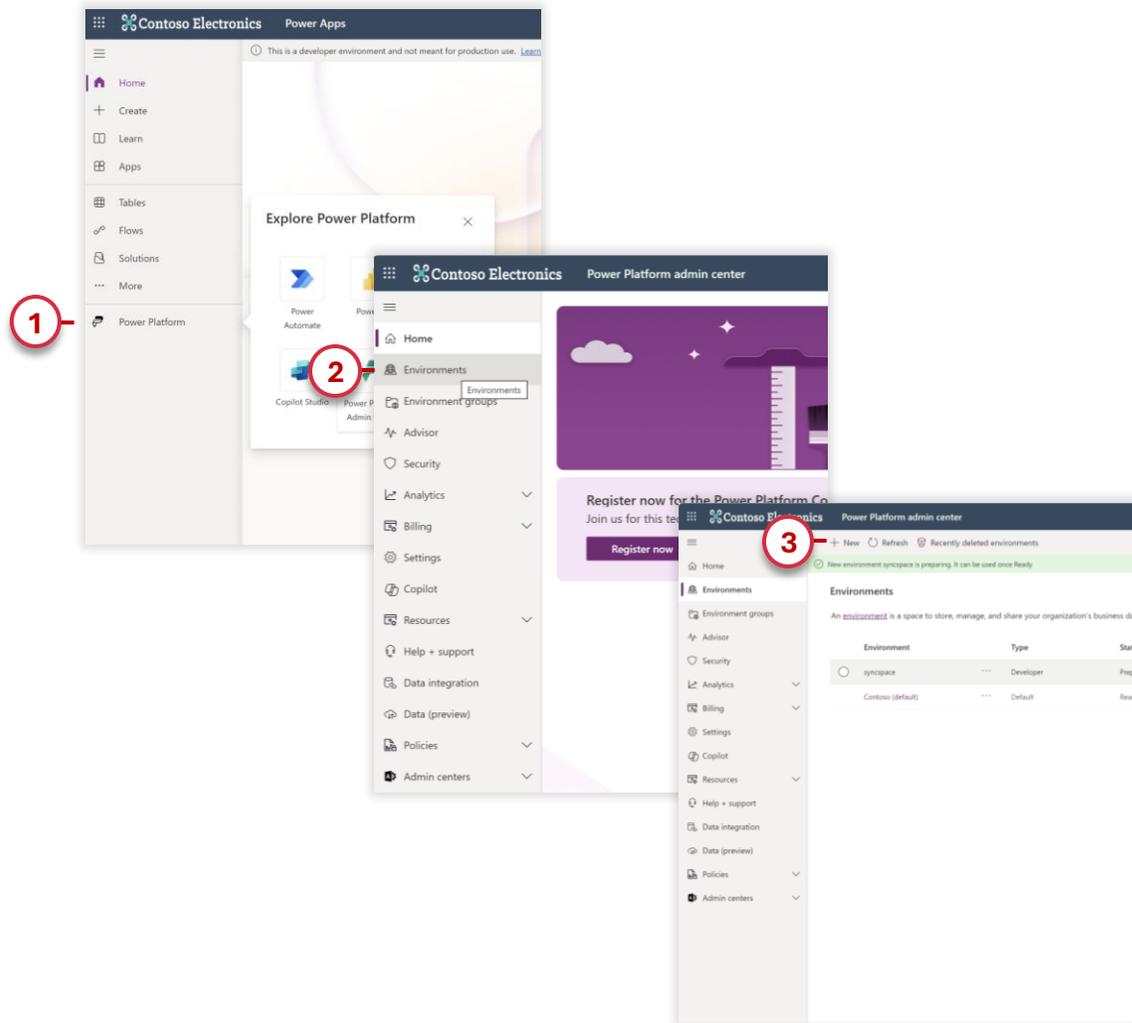
Creating a New Environment

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.

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.

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

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

1. Click on **'Check Access'**.
   › 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.
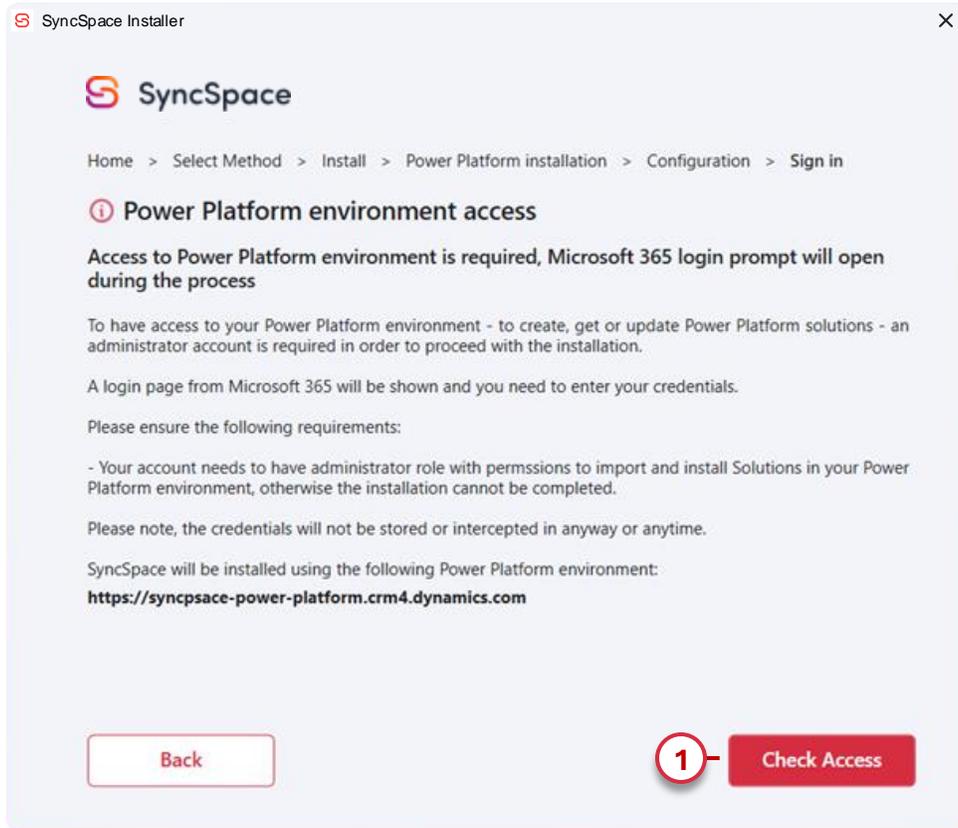
Package Installation Completed
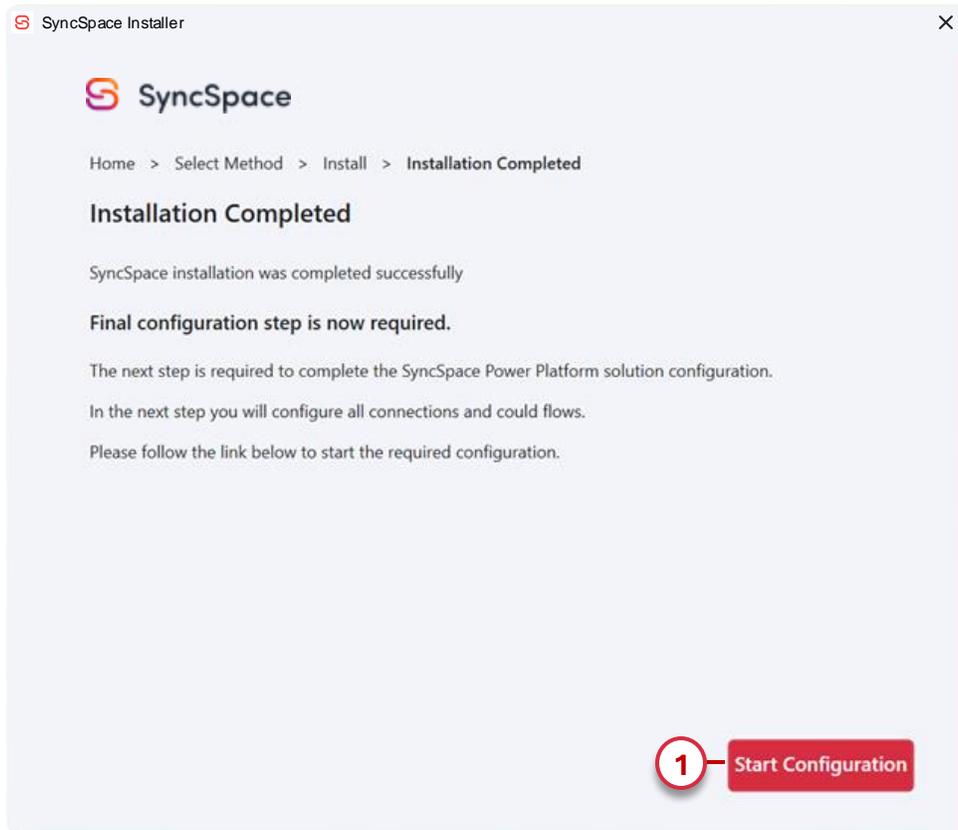
At this stage the installer, after carrying out the installation, will ask you to configure your connections.

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.

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

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.
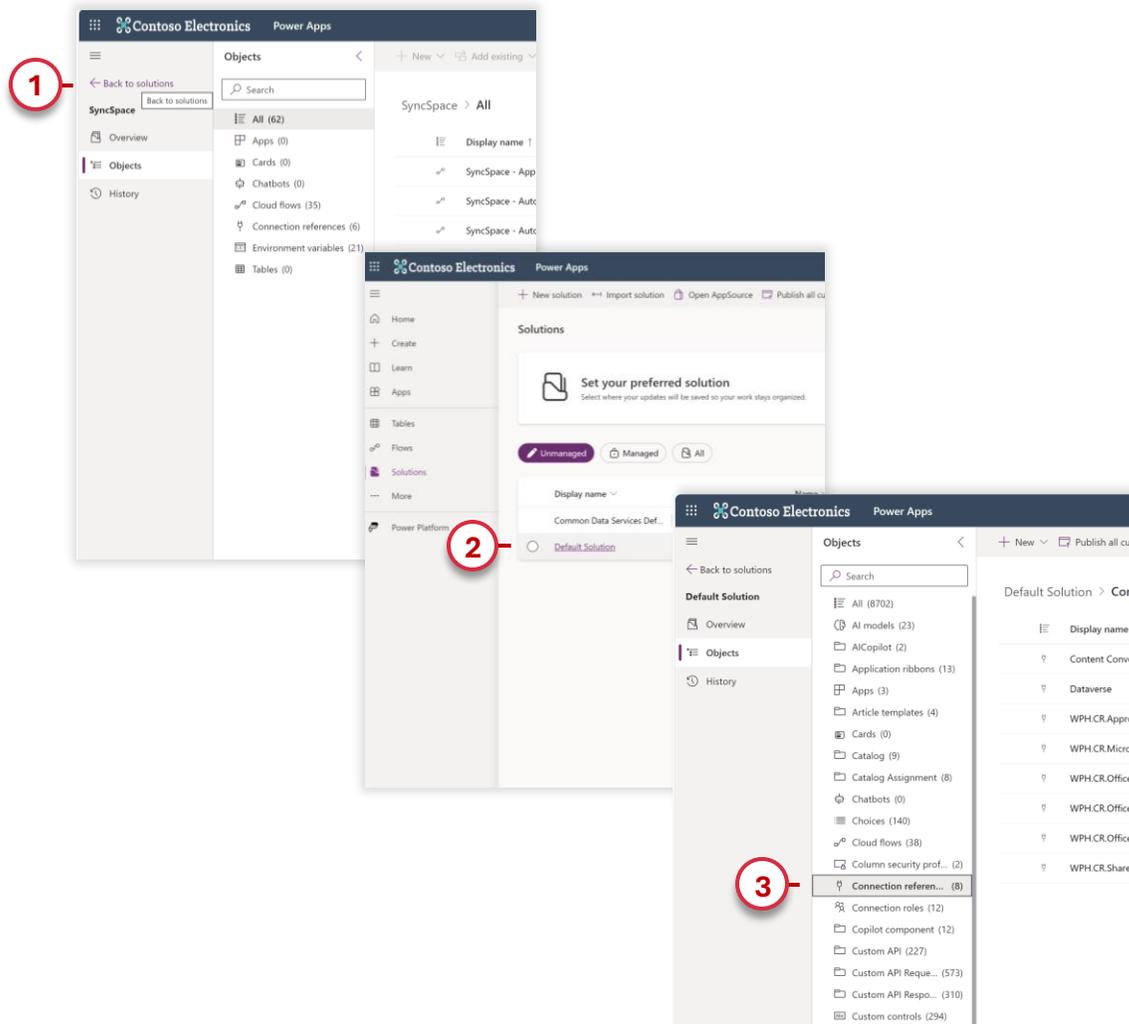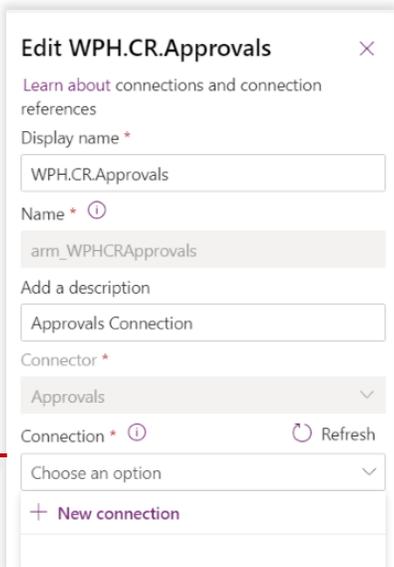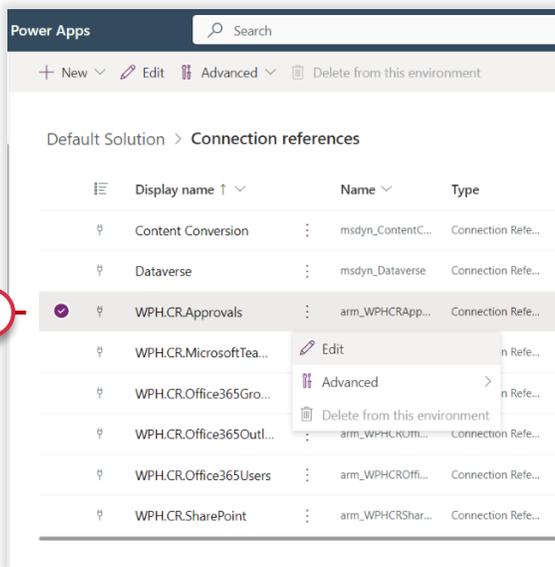
Setting up Approvals

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.
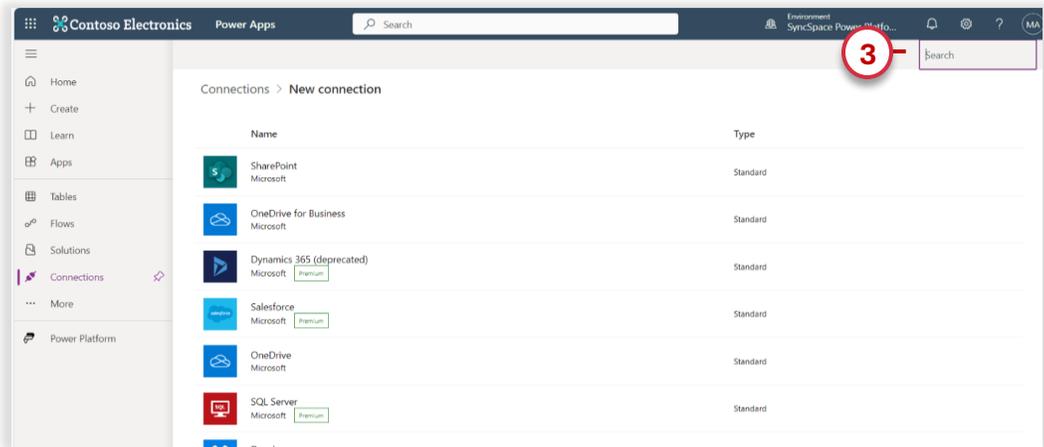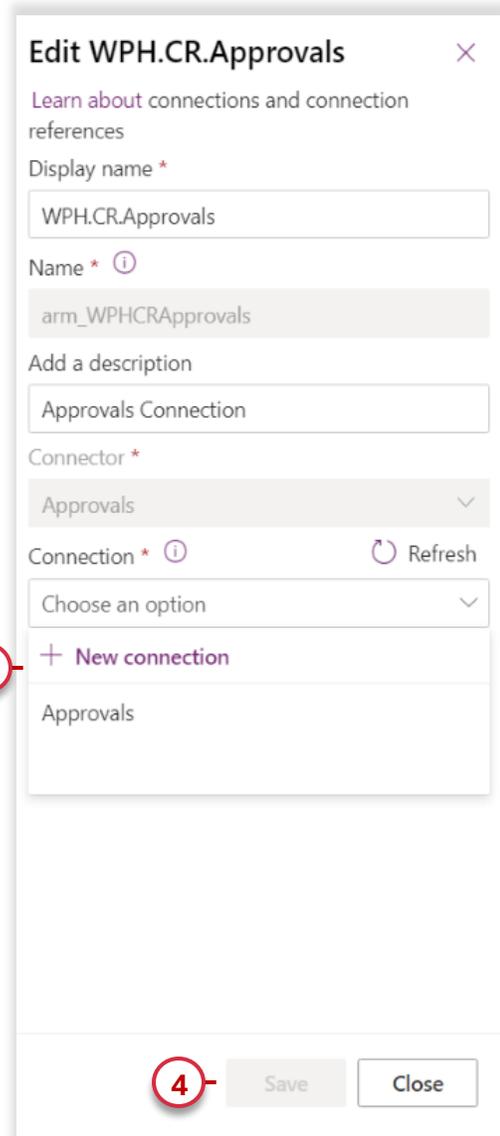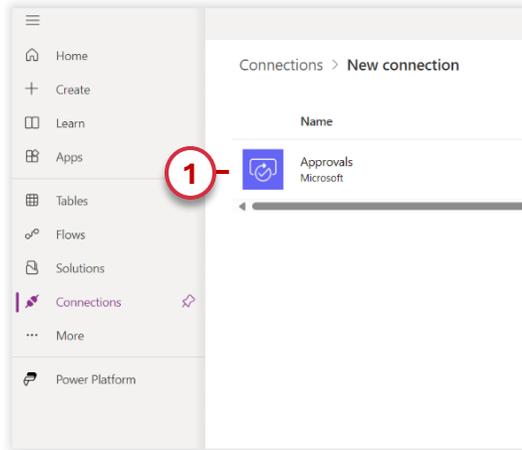
Setting up Approvals

1. Click on the **'Approvals'** connection.

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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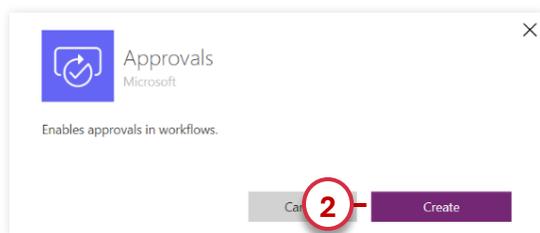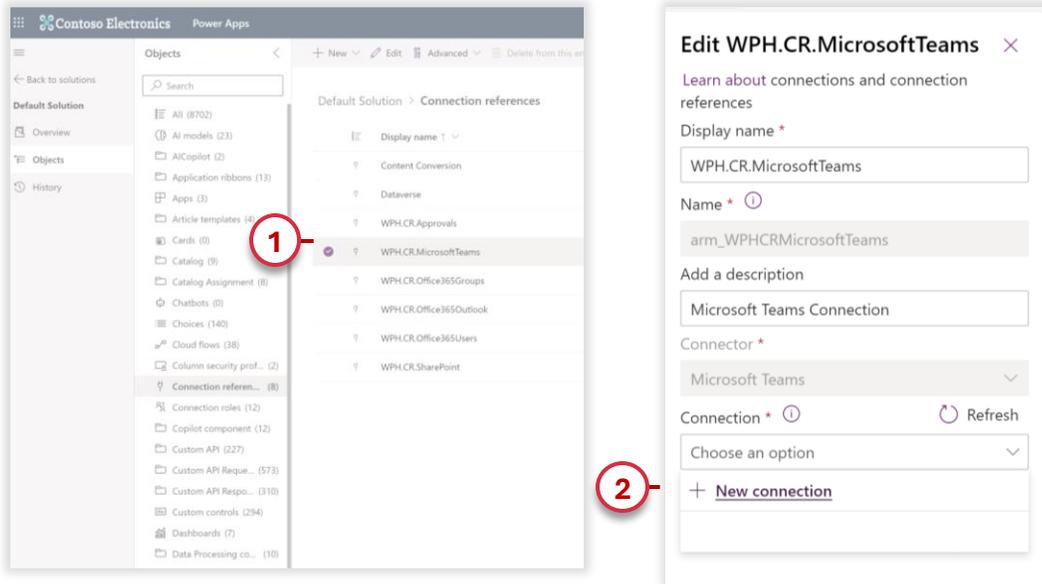
Setting up Teams

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.
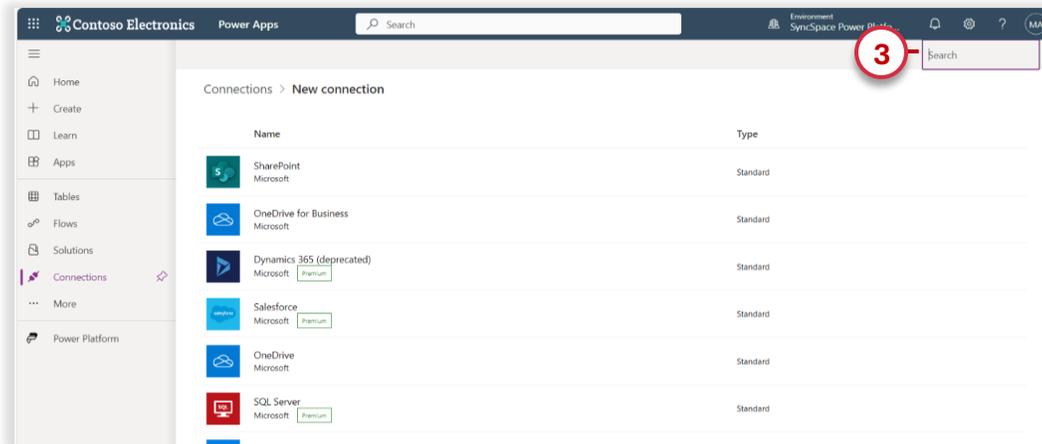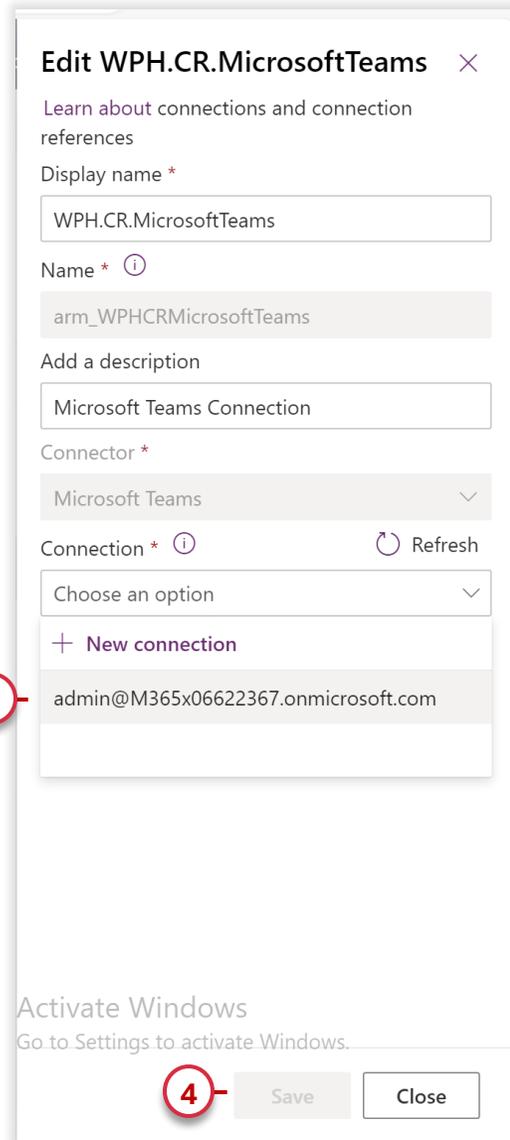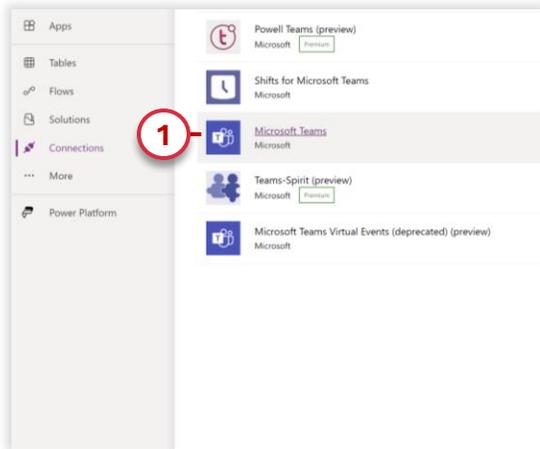
Setting up Teams

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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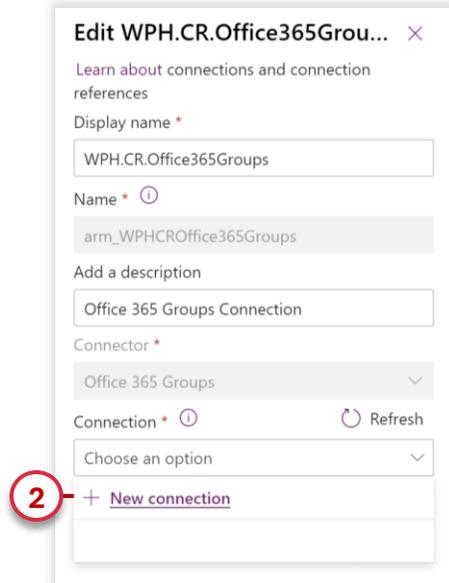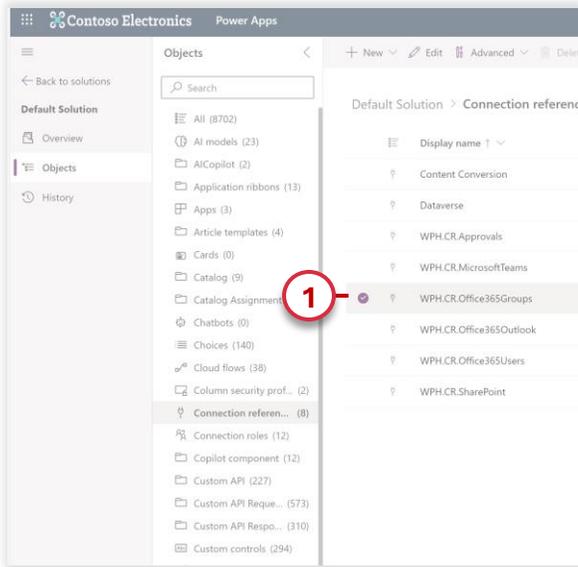
Setting up Office 365 Groups

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.
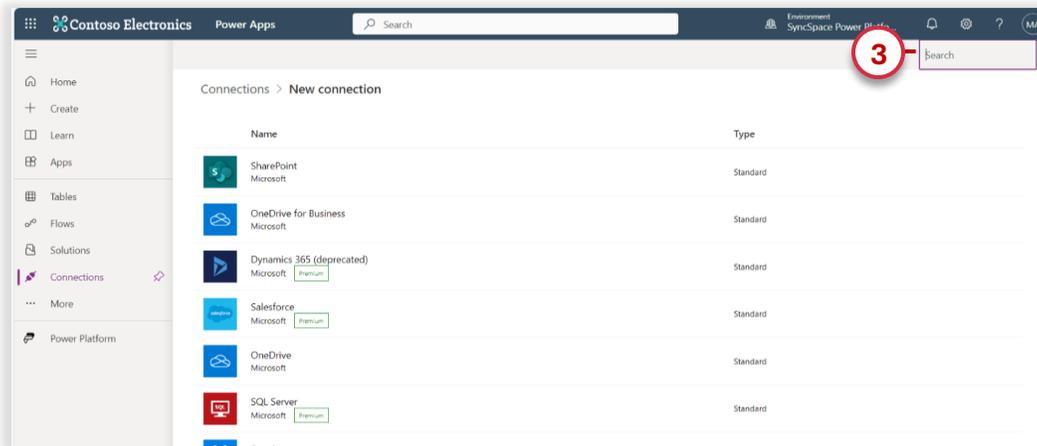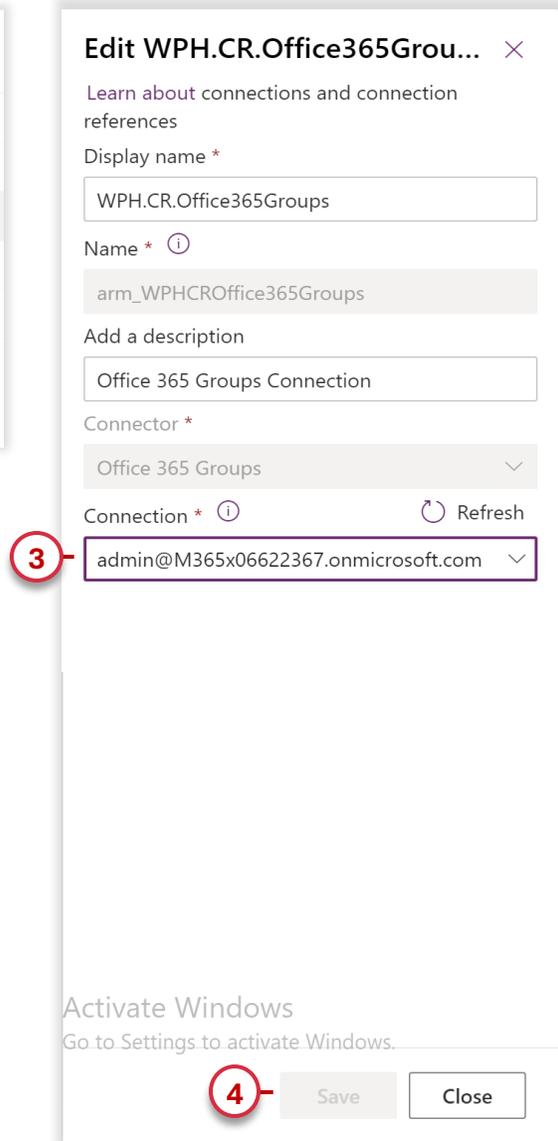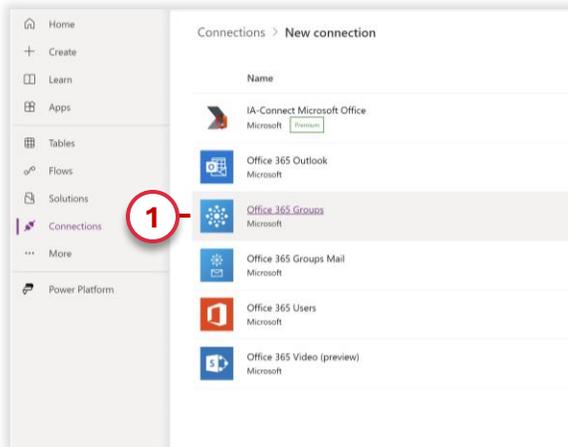
Setting up Office 365 Groups

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

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.
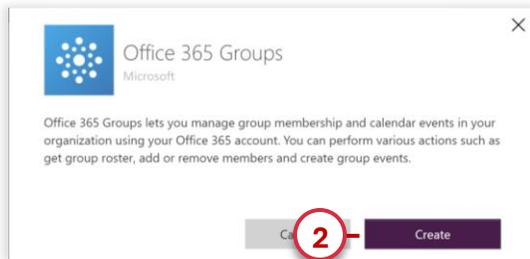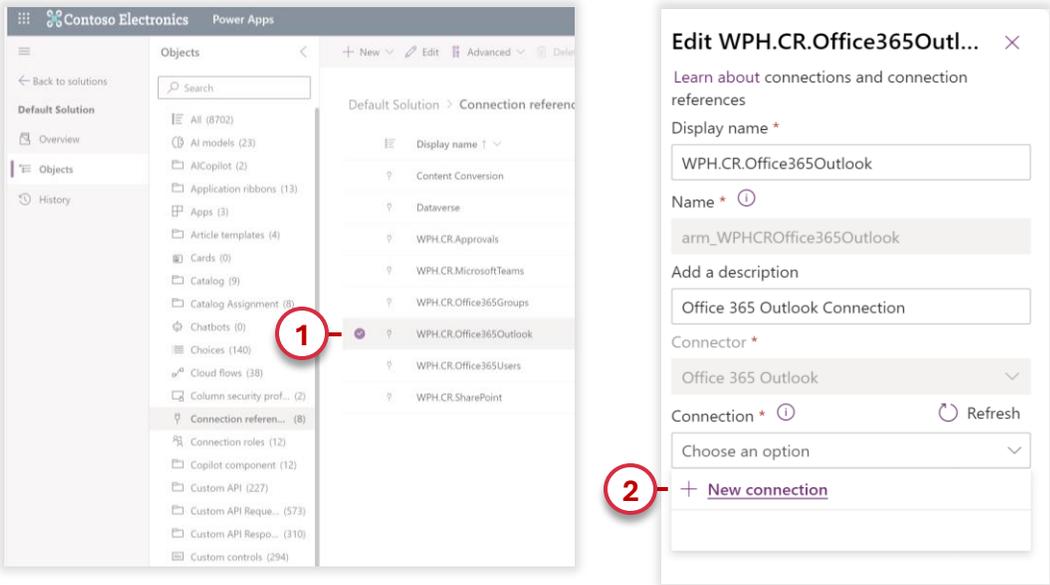
Setting up Office 365 Outlook

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

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.
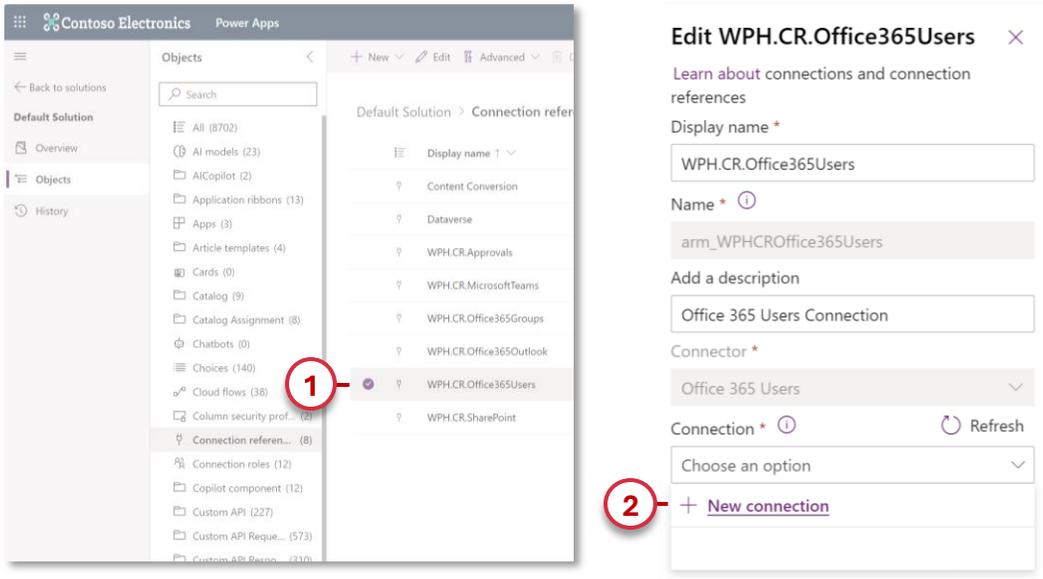
Setting up Office 365 Users

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.

Setting up Office 365 Users

1. Click on the **'Office 365 Users'** 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.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.

Mod. IT.11.01
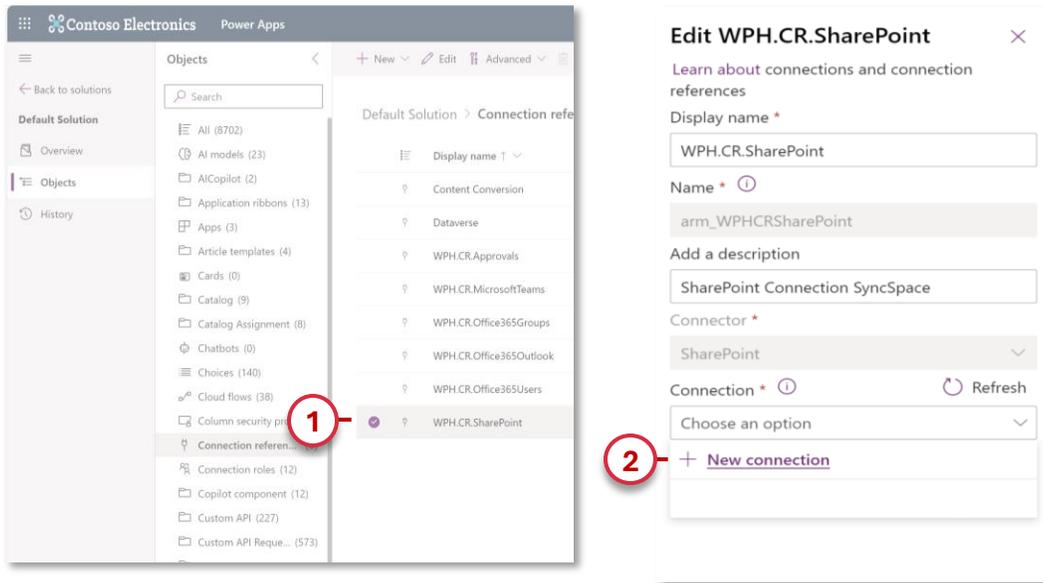
Setting up Sharepoint

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.
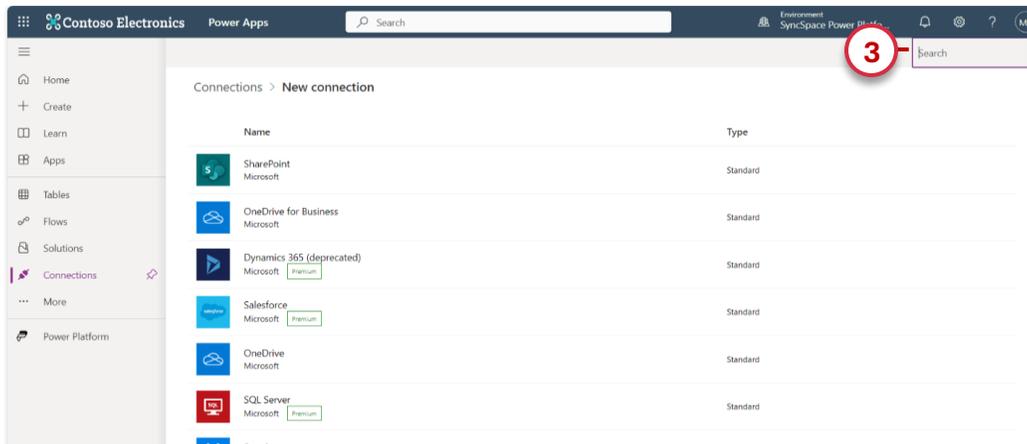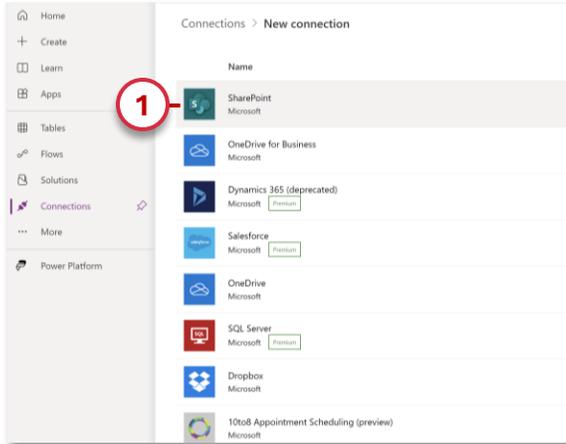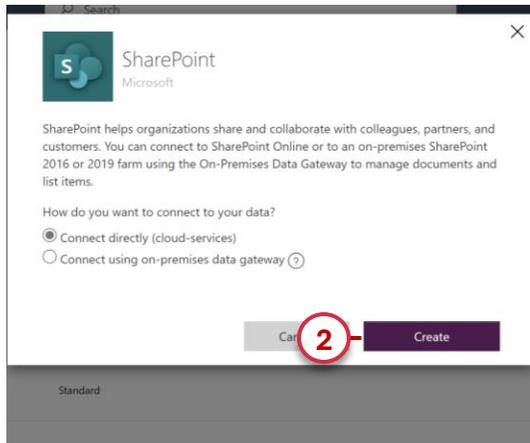
Setting up Sharepoint

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

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

1. 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 .

1 — ⓘ Open SyncSpace backoffice

2 — Finish

SyncSpace