Office 365

SYSPRO 8

Reference Guide

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Simplifying your Success

CONTENTS

Office 365

Office 365

Exploring

Where does it fit in?

Microsoft Office 365 lets you access the latest versions of Word, Excel, PowerPoint, Outlook, OneNote and more, wherever you go and across all your devices.

With Office 365 integrated into SYSPRO, there is no need for a separate desktop installation of Office 365.

You can integrate or combine SYSPRO data into an Office 365 document directly from Office 365.

Starting

Prerequisites

- A valid SYSPRO login, with SYSPRO administrator access rights.

- A valid Microsoft Azure subscription.

- A valid Microsoft Office 365 account.

- Ensure that you save the entries at the **Authority** and **Discovery Resource ID** fields of the **Office Integration** tab (**System Setup**).

  Although both fields already contain valid entries, you must open the **System Setup** program and save settings for them to take effect.

Restrictions and Limits

- Currently, the Office 365 integration with SYSPRO does not support two-factor authentication.

Using

How to register your application in Microsoft Azure

Before you can enable Office 365 support within SYSPRO you need to register your application within Microsoft Azure. This provides you with an Application ID that you will require within SYSPRO.

1. Access Microsoft Azure:

   i. Logon to the Microsoft Azure portal with your account details:

      `https://portal.azure.com`

   ii. Select the **Azure Active Directory** from the main menu.

   iii. Click on **App Registrations** and select your application in order to maintain it.

2. Add a new application:

   i. Select the **Add new Application** option.

   ii. Enter the information as follows:

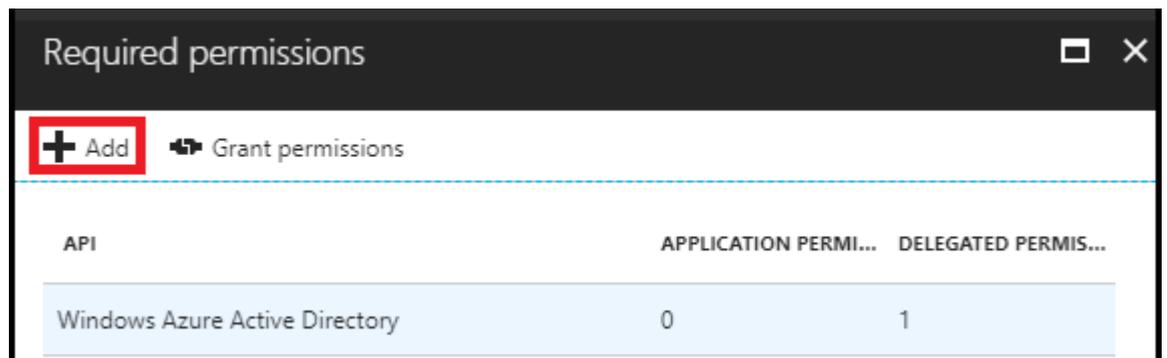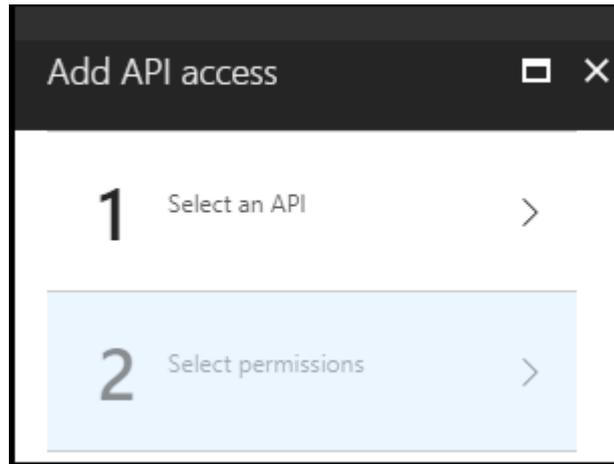 | Field | Input |
   | --- | --- |
   | Name | SYSPROOfficeCloud |
   | Application Type | Native |
   | Redirect URI | SYSPROOfficeCloud |

   iii. Select **Create**.

3. Configure permissions:

a. Click on **Required Permissions** and configure accordingly:
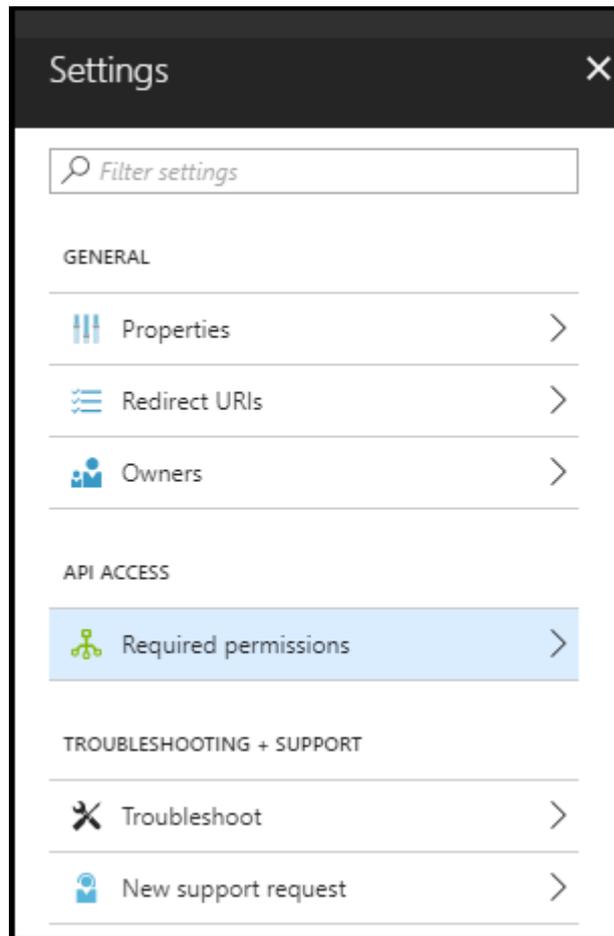
b. Select the **Add** button to add API access:

c. Click the **Select an API** option:

d. Select the following API's:

- Office 365 SharePoint Online
- Office 365 Exchange Online

e. Select **Grant Permissions** and allocate the necessary permissions as follows:

API	Permissions required
Office 365 SharePoint Online	- Read and write user files - Read user files
Office 365 Exchange Online	- Read user mail - Read and write user mail - Send mail as a user - Read user calendars - Read and write user calendars - Read user contacts - Read and write user contacts
Windows Azure Active Directory	- Sign in and read user profile - Read all groups - Read directory data - Access the directory as the signed-in user

f. Once you have successfully configured the permissions, save your application

How to configure SYSPRO for Office 365

Once you have registered and configured your application within Microsoft Azure, you need to configure a few details within SYSPRO.

1. Obtain the Application ID from the Microsoft Azure platform for your newly-created application.

2. Configure SYSPRO.

   a. Open SYSPRO's **System Setup** program.

   b. Select the **Office Integration** tab and capture the Office 365 fields.

Field	Description
Tenant id	Indicates the URI address to your exchange web service provider. This setting is used when resolving email addresses.
Exchange web service	If you don't have an exchange server, you can use the default provided by Office 365 (i.e. `https://outlook.office365.com/ews/exchange.asmx`).
Client id	Indicates the client ID of the **SYSPROOfficeCloud** application added to your active directory in Microsoft Azure.

   If email is defined as an output option in SRS, then Office Integration lets you browse on contacts defined in Office 365 when you browse on **To**, **Cc** or **Bcc** email addresses.

   In addition, Office 365 Excel is used when exporting information from a SYSPRO grid/list view to Excel.

   c. Open the **Personalize** SYSPRO Desktop function to configure the Office 365 credentials per operator (*SYSPRO Ribbon bar > Home > Personalize > Credentials*).

      - Enable the **Microsoft Office 365** option.
      - Enter the operator's Office 365 credentials.
      - Apply and save your changes.

   Your Office 365 support is now configured for support within SYSPRO.

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