Office 365

SYSPRO 8

Reference Guide

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Exploring

Where it fits in?

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

With **Microsoft Office 365** integrated to SYSPRO, you don't need a separate desktop installation of **Office 365**; you can integrate or combine SYSPRO data into an **Office 365** document directly from **Office 365**.

Terminology

Microsoft Azure

Microsoft Azure is a cloud computing service created by **Microsoft** to build, test, deploy, and manage applications and services through Microsoft-managed data centers.

It caters for:

- Software as a service (SaaS)
- Platform as a service (PaaS)
- Infrastructure as a service (IaaS)

In addition, **Microsoft Azure** supports different programming languages, tools and frameworks (including **Microsoft**-specific and third-party software and systems).

Microsoft O365 Tenant

A **Microsoft Office 365** tenant is a regional location that provides cloud services dedicated to an organization (e.g. **Exchange Online**, **SharePoint Online**, **Teams**, etc). It falls within the overall **O365 Data Center** and can be seen as an organization's sandbox environment, housing all its digital assets (e.g. users, domains, subscriptions and data).

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 within the **System Setup** program.
>
> Although both fields already contain valid pre-populated entries, you must open the **System Setup** program and save the settings for these to take effect.

Configuring

The following configuration options in SYSPRO may affect processing within this program or feature, including whether certain fields and options are accessible.

Setup Options

The **Setup Options** program lets you configure how SYSPRO behaves across all modules. These settings can affect processing within this program.

Company General

Setup Options > Company > General

- Email/SMTP settings:
  - Method when emailing
  - Use system-wide SMTP details
  - SMTP server IP address
  - Outgoing email address
  - Username
  - Password
  - Server port
  - Use SSL

Connectivity

Setup Options > System Setup > Connectivity

- Email/SMTP settings:
    - SMTP server IP address
    - Outgoing email address
    - Username
    - Password
    - Server port
    - Use SSL
    - Use system-wide settings
- Office 365:
    - Tenant id
    - Exchange web service
    - Client id
    - Authority
    - Discovery resource id

Restrictions and Limits

- Currently, the **Microsoft Office 365** integration with SYSPRO does not support **Multi-Factor Authentication**.

Solving

System messages

Error messages

AADSTS7000218: The request body must contain the following parameter: 'client_assertion' or 'client_secret'

Synopsis

Full error message:

```
One or more errors occurred.

AADSTS7000218: The request body must contain the following parameter: 'client_
assertion' or 'client_secret'.

Trace ID: d63025eb-0e48-4f4e-9e25-273c45269c00

Correlation ID: e4497a70-e9a9-4783-ae08-7e45bcd62cc9

Timestamp: 2020-06-15 12:04:21Z
```

Cause

This error message appears when emailing or exporting to **Excel** after configuring a new native application in **Microsoft Azure**, if the **Default Client Type** is not configured as public.

Solution

Update the configuration of your application in **Microsoft Azure** as follows:

1. Go to the **App Registration** for your application.

2. Select **Authentication** from the **Manage** menu.

3. Locate the **Default client type** section under **Advanced Settings** and enable the **Treat application as a public client** option.

4. Save your changes.

FAQs

How do I configure different Microsoft Office 365 tenants for operators?

1. Open the **Office 365 Tenant Maintenance** program (*Program List > Administration > General Setup*) and add the multiple tenant records according to your requirements.

2. Open the **Personalize** program (*SYSPRO Ribbon bar > Home*) to indicate which tenant SYSPRO must use when communicating with **Microsoft Office 365**).

Using

Microsoft Azure Configuration

How to register your application in Microsoft Azure

Before you can enable **Microsoft Office 365** support within SYSPRO, you must register your application within **Microsoft Azure**.

> This provides you with an **Application ID** that is required when configuring SYSPRO.

1. Access the **Microsoft Azure** portal:

   `https://portal.azure.com`

2. Select the **Azure Active Directory** option from the main menu.

3. From the **Manage** menu, select the **App registrations** option.

4. Select the specific application you want to maintain.

5. Ensure that the following **Advanced Settings** options (accessible from the **Authentication** section) are enabled against your application:

   - Access tokens
   - ID tokens
   - Treat application as a public client

6. Add the required APIs to your application:

   Select **View API permissions** followed by the **Add a permission** option.

   The **Request API Permissions** screen is displayed.

7. From the **Microsoft APIs** pane, add the following APIs:

   - Azure Active Directory Graph
   - Exchange
   - SharePoint

8. Set up the permissions for each API:

   #### Azure Active Directory Graph

   a. Select the **Azure Active Directory Graph** API.

   The **Request API Permissions** screen is displayed.

   b. Select **Delegated permissions** and enable the following permissions:

- **Directory**
  - Directory.AccessAsUser.All
  - Directory.Read.All
- **Group**
  - Group.Read.All
- **User**
  - User.Read

c. Select the **Add permissions** option to save your changes.

d. Enable the **Grant Admin Consent** option for the API.

Exchange

a. Select the **Exchange** API.

The **Request API Permissions** screen is displayed.

b. Select **Delegated permissions** and enable the following permissions:
- **Calendars**
  - Calendars.Read
  - Calendars.ReadWrite
- **Contacts**
  - Contacts.Read
  - Contacts.ReadWrite
- **Mail**
  - Mail.Read
  - Mail.ReadWrite
  - Mail.Send

c. Select the **Add permissions** option to save your changes.

d. Enable the **Grant Admin Consent** option for the API.

SharePoint

a. Select the **SharePoint** API.

The **Request API Permissions** screen is displayed.

b. Select **Delegated permissions** and enable the following permissions:

- **MyFiles**
  - MyFiles.Read
  - MyFiles.Write

c. Select the **Add permissions** option to save your changes.

d. Enable the **Grant Admin Consent** option for the API.

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

SYSPRO Configuration

How to configure SYSPRO for Office 365

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

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

2. Capture the following Email/SMTP settings in the **Setup Options** program (*Setup Options > System Setup > Connectivity*):

   - Office 365:

     - Tenant id

     - Exchange web service

     - Client id

     - Authority

     - Discovery resource id

3. Save your changes and exit the program.

4. Open the **Personalize** program in SYSPRO (*SYSPRO Ribbon bar > Home*) and navigate to the **Credentials** tab.

5. Configure the **Office 365** credentials per operator as follows:

   - Enable the **Microsoft Office 365** option.

   - Capture the operator's **Office 365** credentials.

   - Indicate which tenant must be used when communicating with **Office 365**.

6. Save your changes and exit the program.

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

> 💡 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 view or list view to **Microsoft Excel**.

Affected Programs

The following indicates areas in the product that may be affected by implementing this feature:

Office 365 Tenant Maintenance

Program List > Administration > General Setup

> Alternatively, you can access this program from within the **Setup Options** program by selecting the **Office Tenants** option from the **Define** menu on the toolbar.

This program lets you maintain multiple tenants for **Microsoft Office 365**, which then stores the information in the `AdmOfficeTenants` system-wide table.

Once this is configured, you can use the **Personalize** program (*SYSPRO Ribbon bar > Home*) to define against each operator which tenant SYSPRO must use when communicating with **Microsoft Office 365**.

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