

Credentials for HingePoint Sync and adding new users from the portal

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Create Procore credentials.

HingePoint Sync service uses Procore Service Account to configure webhooks for all projects and sync content from different systems (Windows and SharePoint) to Procore.

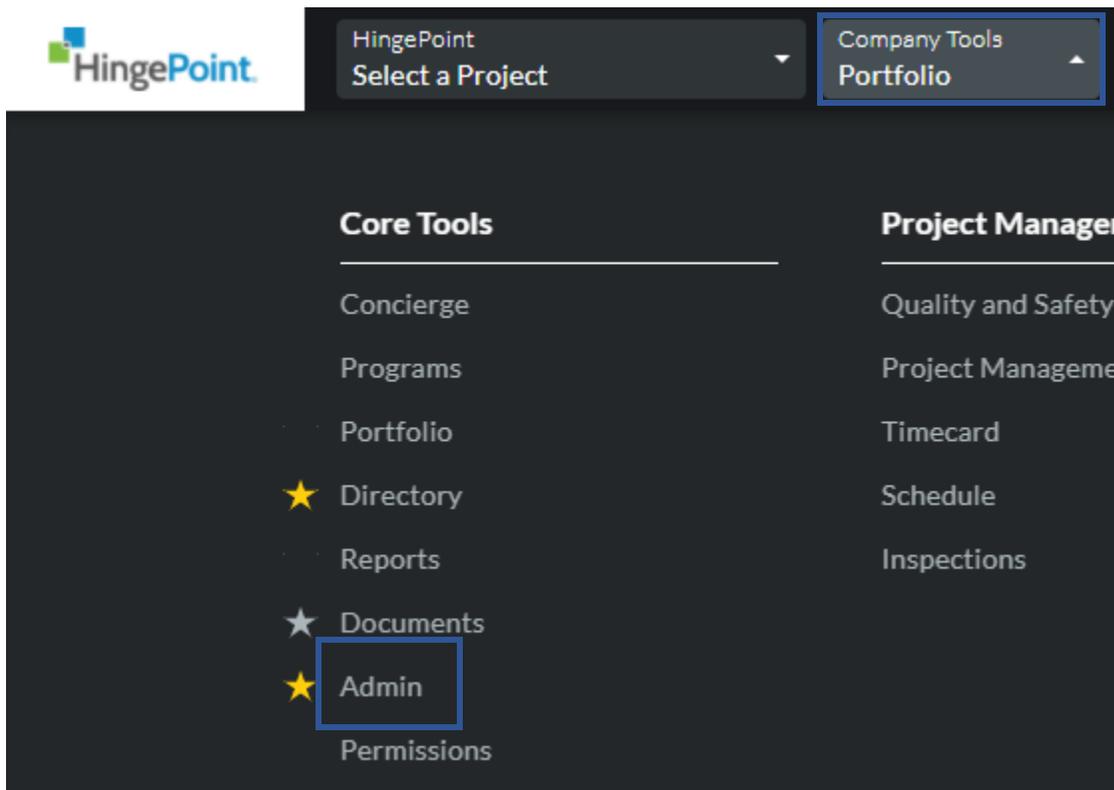
The articles from below described how to create and assign permissions for Procore Service Account.

Create Service Account in the Procore Organization

The article from below described how to create Procore Service Account

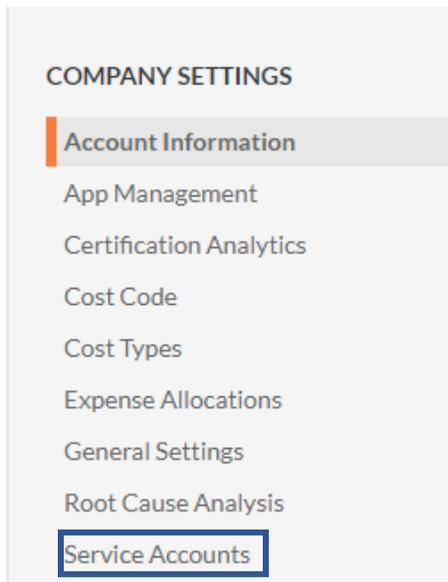
<https://support.procore.com/products/online/user-guide/company-level/admin/tutorials/create-service-account>

1. Open your Procore Company (<https://app.procore.com/>) and select Admin in Company Tools:

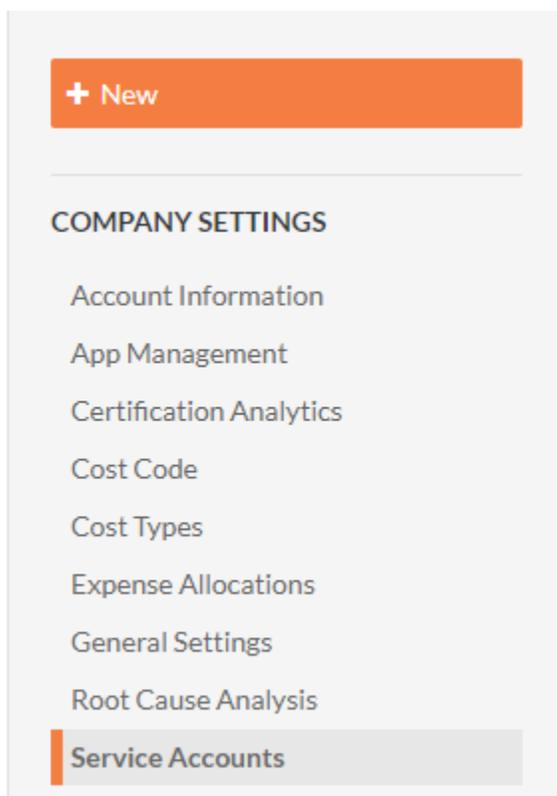




2. Select Service Account in the right navigation pane:



3. Select New:





4. Select Custom and fill the name for Service Account (HingePoint-Sync). Select Create:

SERVICE ACCOUNT INFORMATION

App Type	Marketplace <input type="radio"/>	<input checked="" type="radio"/> Custom
Name *	<input type="text" value="HingePoint-Sync"/>	

5. Service Account created:

HINGEPOINT-SYNC-HINGEPOINT



Warning

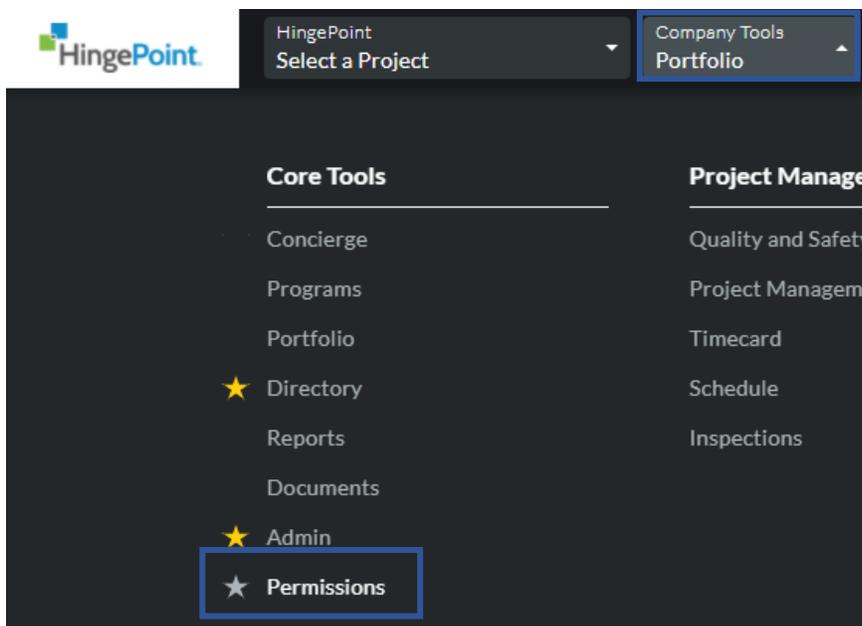
This is the only time you will be able to view your Client Secret. Please save it securely for client authentication.

Client ID	32t4fg4wbhtgretghre
Client Secret	asdfsrfeasdrfgesrt
App Name	Custom

Note: Please save ClientID and Client Secret in the secure password storage. You cannot find the Client Secret after you create the app only by regenerating a new Secret.

Create Permissions template

1. Open your Procore Company (<https://app.procore.com/>) and select Permissions in Company Tools:



2. Select Project Permissions Template and Select Project (Global) – Assignable to All Projects:

Project Permissions Templates Reporting ▾ + Create Project Permissions Template ▾

Project (Global) - Assignable to All Projects

3. Specify the name for permissions template and select Confirm:

Create Global Permissions Template ✕

HingePoint-Sync-Projects

Cancel **Confirm**

4. Select permissions from the screenshot (all other permissions can be left):

Cancel **Save ▾**

Permissions Tools	None	Read Only	Standard	Admin
Core Tools				
Admin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Directory	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Documents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Home		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reports	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tasks	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project Management				



5. Select Save:

HingePoint-Sync-Projects

Edit Template Manage Assignable Templates Manage Users

Cancel Save

Save

Save & Return to Project Permissions

Permissions Tools: None, Read Only, Standard, Admin

Core Tools

6. Select Manage Assignable Templates tab and select our template. Select Save:

HingePoint-Sync-Projects

Edit Template Manage Assignable Templates Manage Users

Select the template(s) that members of this template can assign to user(s) for one or more projects.

Save

Save & Return to Edit Template
Save & Return to Project Permissions

Project Permissions Templates	Active Users	Inactive Users	Type	Project #	Project
<input type="checkbox"/> Architect/Engineer - External	0 Users	0 Users	Global		Assign to any project
<input type="checkbox"/> Foreman/Superintendent - Internal	0 Users	0 Users	Global		Assign to any project
<input checked="" type="checkbox"/> HingePoint-Sync-Projects	0 Users	0 Users	Global		Assign to any project

Assign Permissions Template for Service Account

1. Open your Procore Company (<https://app.procore.com/>) and select Permissions in Company Tools:

HingePoint

HingePoint Select a Project

Company Tools Portfolio

Core Tools

- Concierge
- Programs
- Portfolio
- ★ Directory
- Reports
- Documents
- ★ Admin
- ★ **Permissions**

Project Management

- Quality and Safety
- Project Management
- Timecard
- Schedule
- Inspections



2. On the User Permissions tab select our Service Account created in the topic above and select Assign Default Project Permissions:

Permissions **User Permissions** Comp

HingePoint-Sync x Q Add F

<input type="checkbox"/>		User
<input type="checkbox"/>	Actions ▾	hingepoint-sync-hinge
<input type="checkbox"/>	Assign Company Permissions	
<input type="checkbox"/>	Assign Default Project Permissions	
<input type="checkbox"/>		

3. Select Assign for template that was created in topic above:

User Permissions > Assign Default Project Permissions

Assign Default Project Permissions

i Assign users a Default Project Permissions Template.

	Project Permissions Templates
<input type="button" value="Assign"/>	Architect/Engineer - External
<input type="button" value="Assign"/>	Foreman/Superintendent - Internal
<input type="button" value="Assign"/>	HingePoint-Sync-Projects



4. Select Confirm:

 **Are you sure you want to assign this template?** 

1 user will be assigned to the **HingePoint-Sync-Projects** permission template.

 hinge-point-pro-core-sync-hinge-point

Cancel

Confirm

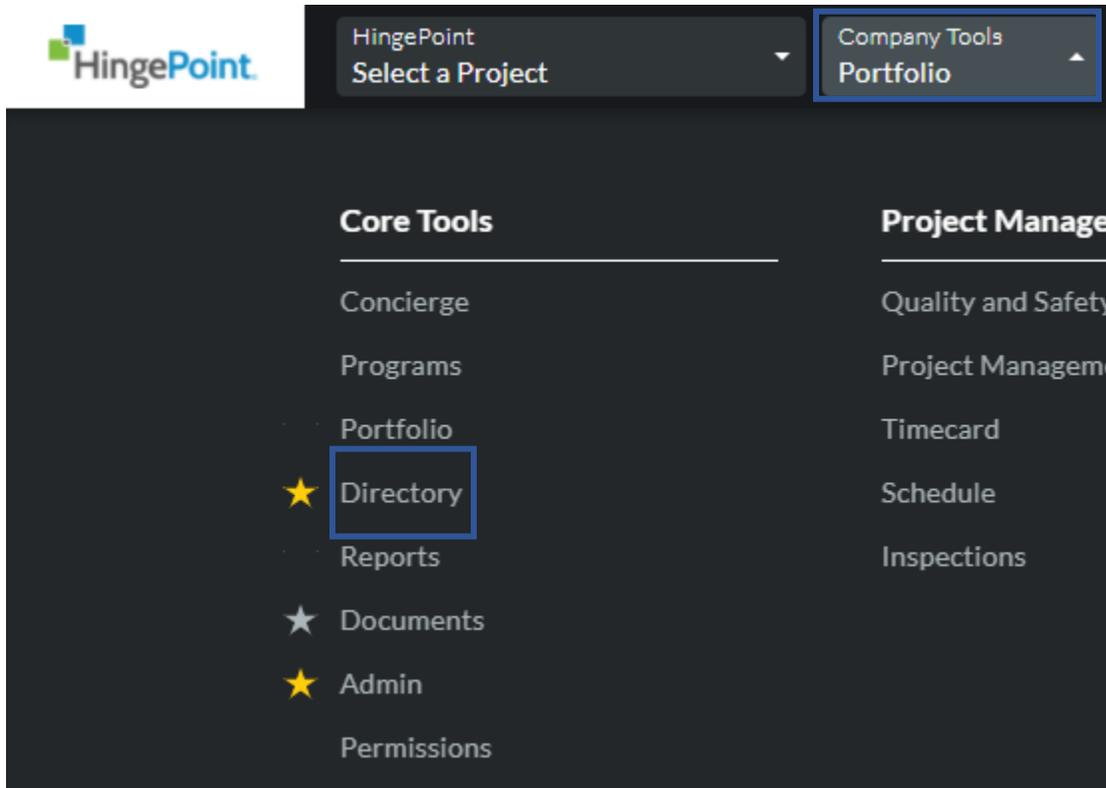


Assign permissions for Service Account in the Procore.

The articles from below described how to assign permissions for Procore Service Account

<https://support.procore.com/products/online/user-guide/company-level/admin/tutorials/configure-service-account-permissions>

1. Open your Procore Company (<https://app.procore.com/>) and select Directory in Company Tools:





2. Find Service Account that was created in the previous topic and select Edit:

COMPANY DIRECTORY Users Contacts Companies Distribution Groups Inactive Users

HingePoint-Sync x Q Group by: Company Add Filter

Displaying 1 - 3 of 3

<input type="checkbox"/>			Name ↓	Email / Phone / Fax	A
<input type="checkbox"/>	No Company				
<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	 hinge-point-sync-hinge-point	hinge-point-sync-hinge-point-2f4ba801@procore.com	

3. Provide access to new projects if you plan sync new projects:

New Project Settings

Default permission template when added to projects: None [Select Default Template](#) [Configure Templates](#)

Add hinge-point-sync-hinge-point to all new projects in HingePoint

Allow hinge-point-sync-hinge-point to create new projects (hinge-point-sync-hinge-point will have full administrative access to any projects that they create)

4. Add all current projects to the access list or add only those projects that plan to sync::

Current Project Settings
hinge-point-sync-hinge-point currently has access to the following projects:

Project Number	Project Name ▲	Current Permission Template	

Projects hinge-point-sync-hinge-point Does Not Belong To

Project Number	Project Name ▲	Current Permission Template	

Current Project Settings
hinge-point-sync-hinge-point currently has access to the following projects:

Project Number	Project Name ▼	Current Permission Template	
	Sandbox Project	HingePoint-Sync-Projects	<input type="button" value="Change Template"/> <input type="button" value="Remove"/>

5. Select Save:

Cancel

Save And Send Invitation To Procore

Save

HingePoint Sync service uses SharePoint App-Only for event receivers activation and sync content from different systems (Windows and Procore) to SharePoint.

The article below described how to create and assign permissions for SharePoint App-Only.

<https://docs.microsoft.com/en-us/sharepoint/dev/solution-guidance/security-apponly-azureacs#setting-up-an-app-only-principal-with-tenant-permissions>

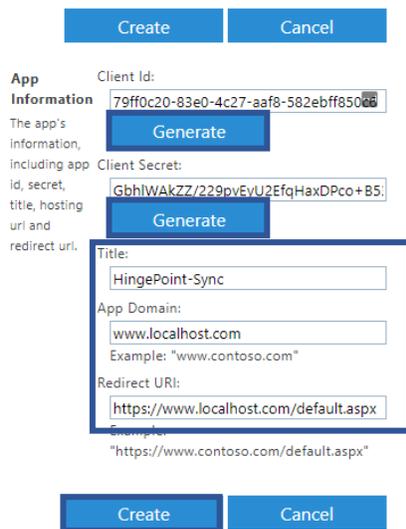
App registration

1. Open https://your-tenant-name-admin.sharepoint.com/_layouts/15/appregnew.aspx (for ex. https://hingepoint-admin.sharepoint.com/_layouts/15/appregnew.aspx).
2. Generate ClientID and Client Secret and fill the Title, App Domain and Redirect URL using values from below. Select Create:

Title: HingePoint-Sync

App Domain: www.localhost.com

Redirect URL: <https://www.localhost.com>



The screenshot shows the 'App Information' form in SharePoint. At the top are 'Create' and 'Cancel' buttons. The form has two 'Generate' buttons for 'Client Id' and 'Client Secret'. Below these are input fields for 'Title', 'App Domain', and 'Redirect URL'. The 'Title' field contains 'HingePoint-Sync', 'App Domain' contains 'www.localhost.com', and 'Redirect URL' contains 'https://www.localhost.com/default.aspx'. At the bottom are another 'Create' and 'Cancel' buttons.

Client Id:	79ff0c20-83e0-4c27-aaf8-582ebff850c8
Client Secret:	GbhIWakZZ/229pvEyU2EfqHaxDPco+B5j
Title:	HingePoint-Sync
App Domain:	www.localhost.com
Redirect URL:	https://www.localhost.com/default.aspx

3. Select Ok in the next screen.

Note: Please save Client ID and Client Secret in the secure password storage. You can not get Client Secret after you create the app only by creating the new app.



Assign permissions for Tenant Wide (for all sites in the tenant)

1. Open SharePoint Admin Center and use this link to assign permissions the app https://your-tenant-name-admin.sharepoint.com/_layouts/15/appinv.aspx (for ex. https://hinge-point-admin.sharepoint.com/_layouts/15/appinv.aspx).
2. Put Client ID from previous topic to App Id and select Lookup (other fields should be auto populated):

App Id and Title
The app's identity and its title.

App Id:

Title:

App Domain:

Example: "www.contoso.com"

Redirect URL:

Example:
"https://www.contoso.com/default.aspx"

3. Put below settings to Permission Request XML:

```
<AppPermissionRequests AllowAppOnlyPolicy="true">
```

```
<AppPermissionRequest Scope="http://sharepoint/content/tenant" Right="FullControl" />
```

```
</AppPermissionRequests>
```

Permission Request XML:

```
<AppPermissionRequests
AllowAppOnlyPolicy="true">
<AppPermissionRequest
Scope="http://sharepoint/content/tenant"
Right="FullControl" />
</AppPermissionRequests>
```

4. Select Create and Trust It in the next screen:

Do you trust HingePoint-Sync?

Let it have full control of all site collections.

Let it share its permissions with other users.

Let it access basic information about the users of this site.



HingePoint-Sync



Assign permissions for Site Wide (for a particular site)

1. Open target SharePoint site and use this link to assign permissions the app https://your tenant name.sharepoint.com/sites/your site/_layouts/15/appinv.aspx (for ex. https://hingepoint.sharepoint.com/sites/HingePointSync/_layouts/15/appinv.aspx).
2. Put Client ID from previous topic to App Id and select Lookup (other fields should be auto populated):

App Id:

79ff0c20-83e0-4c27-a...

Lookup

Title:

HingePoint-Sync

App Domain:

www.localhost.com

Example: "www.contoso.com"

Redirect URL:

https://www.localhost.com/default.asp:

Example: "https://www.contoso.com/default.aspx"

3. Put below settings to Permission Request XML:

```
<AppPermissionRequests AllowAppOnlyPolicy="true">  
<AppPermissionRequest Scope="http://sharepoint/content/sitecollection"  
Right="FullControl" />  
</AppPermissionRequests>
```

Permission Request XML:

```
<AppPermissionRequests  
AllowAppOnlyPolicy="true">  
<AppPermissionRequest  
Scope="http://sharepoint/content/sitecoll  
ection"  
Right="FullControl" />  
</AppPermissionRequests>
```

4. Select Create and Trust It in the next screen:

Do you trust HingePoint-Sync?

Let it have full control of all site collections.

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Let it access basic information about the users of this site.



HingePoint-Sync

Trust It

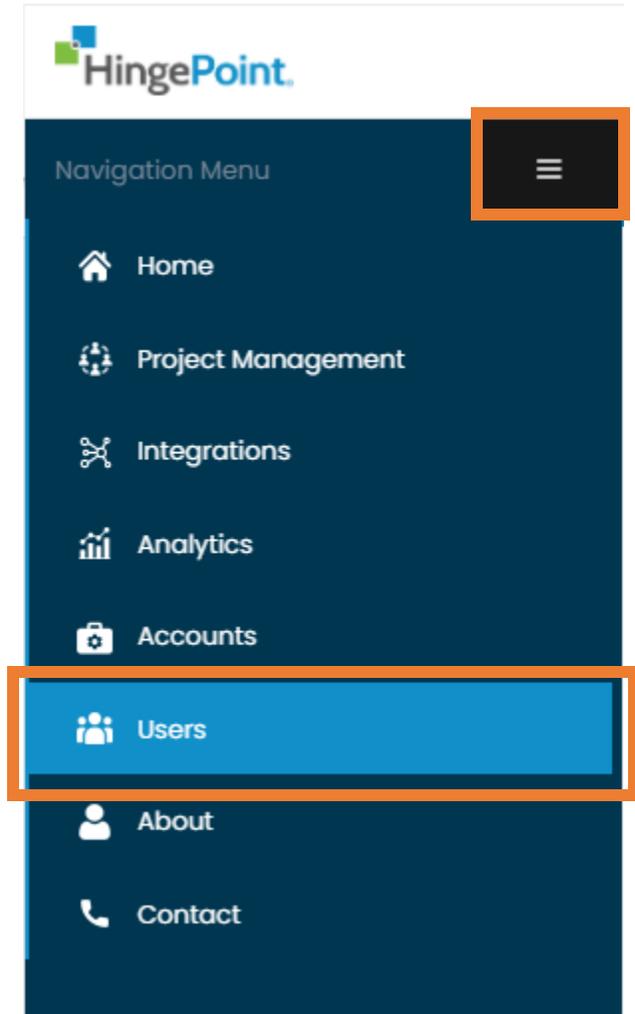
Cancel

Business Confidential

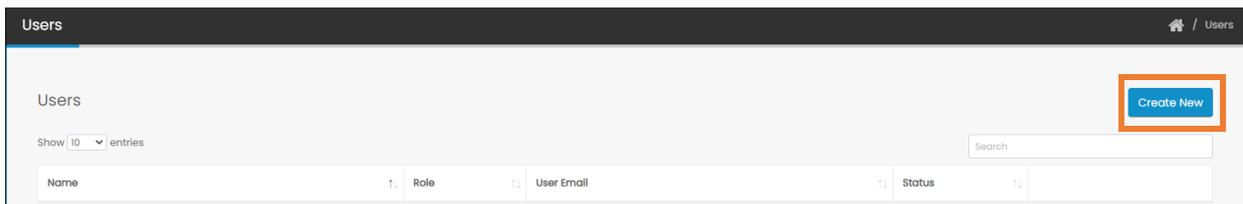


Add additional users from management portal.

1. Login to HingePoint Sync service management portal as using company administrator account.
2. Select Users in the Navigation Menu



3. Select Create New:





4. Fill all fields in the form and select User role:

Create New User

First Name *	<input type="text" value="Bryce"/>
Last Name *	<input type="text" value="Finnerty"/>
User Email *	<input type="text" value="bryce.finnerty@hingepoint.com"/>
Role *	<input type="text" value="User"/>

5. Select Save:

Create New User

First Name *	<input type="text" value="Bryce"/>
Last Name *	<input type="text" value="Finnerty"/>
User Email *	<input type="text" value="bryce.finnerty@hingepoint.com"/>
Role *	<input type="text" value="User"/>