Credentials for HingePoint Sync

and adding new users from the portal

Contents

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.

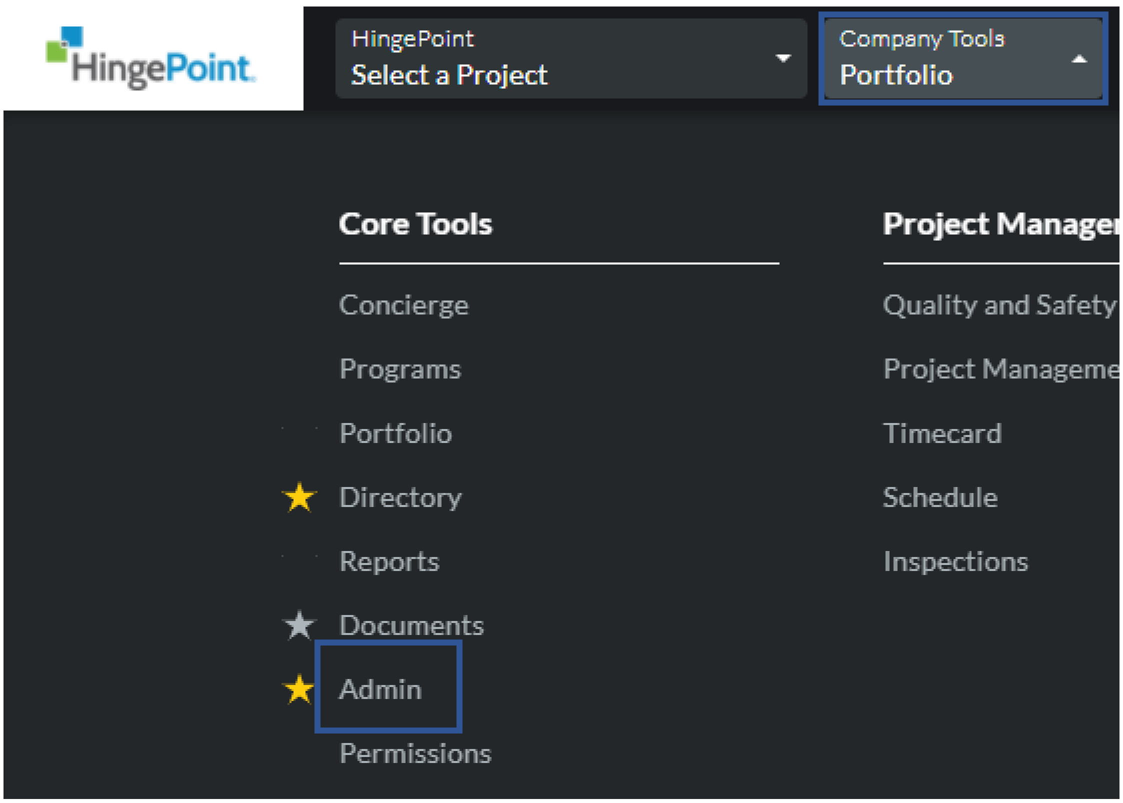
The articles from below described how to create and assign permissions for Procore Service Account.

Create Service Account in the Procore Organization

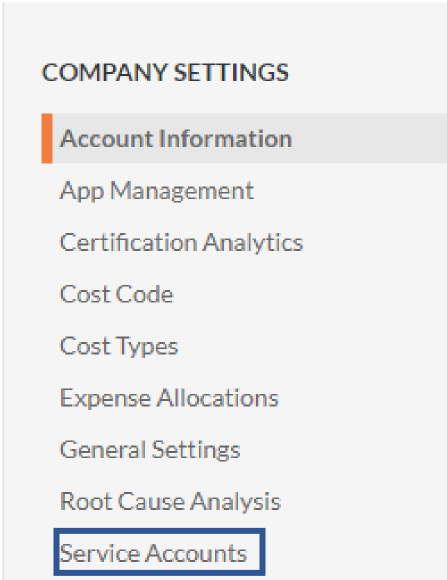
The article from below described how to create Procore Service Account

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

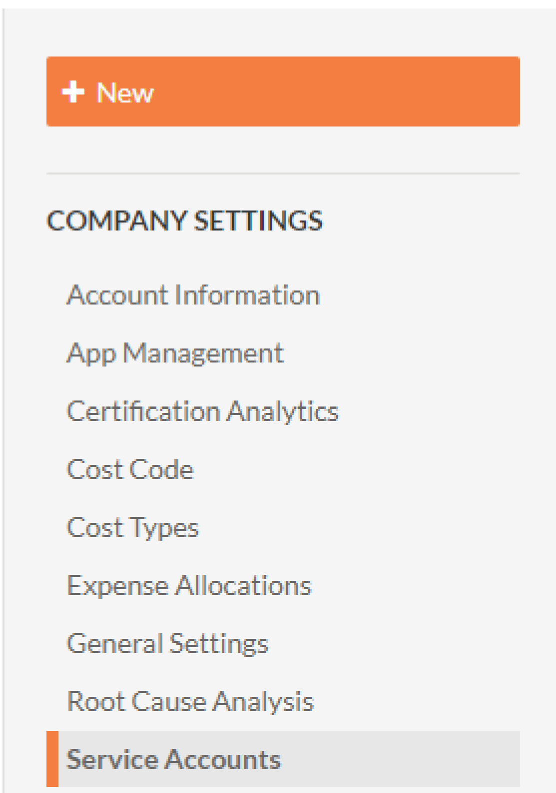
1. Open your Procore Company (https://app.procore.com/) and select Admin in Company Tools:



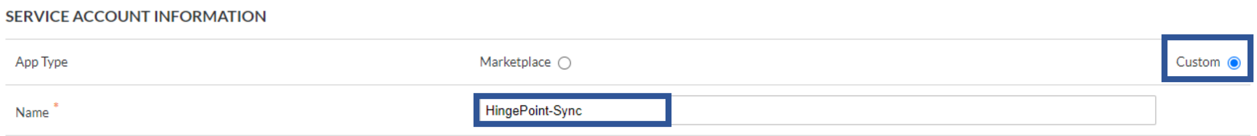
2. Select Service Account in the right navigation pane:



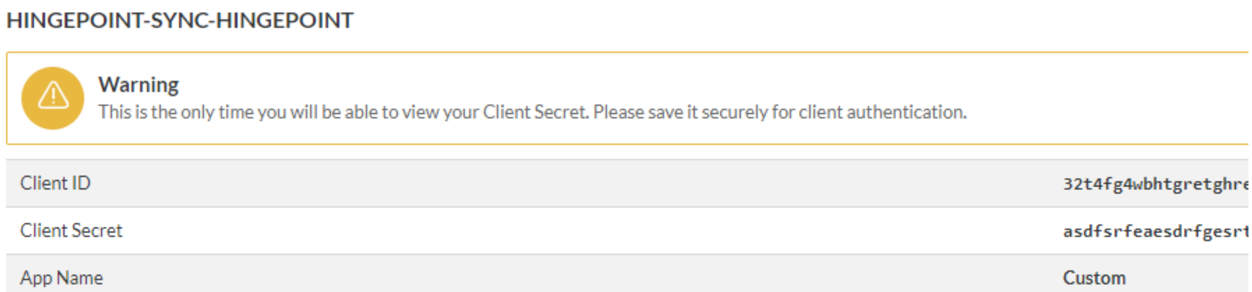
3. Select New:



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



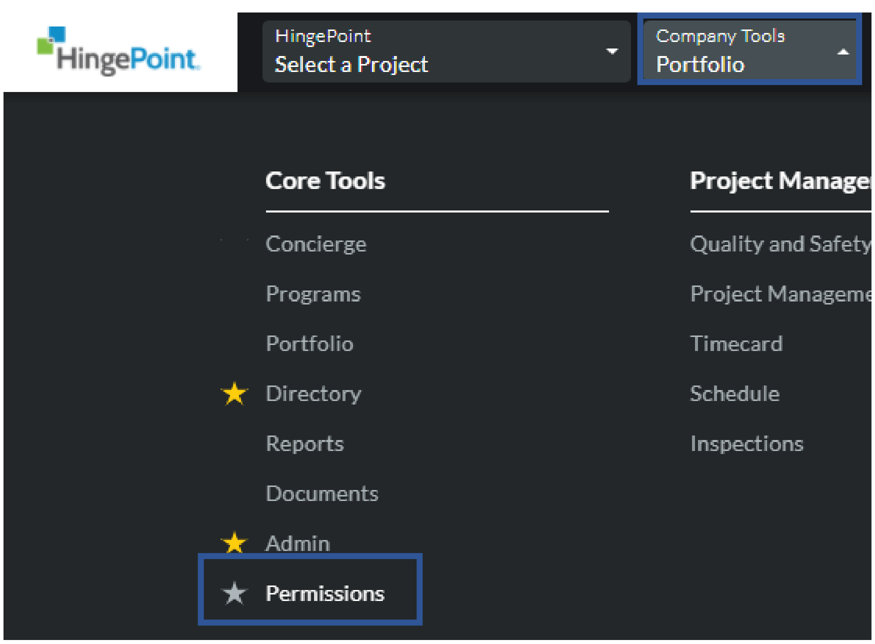
5. Service Account created:



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.

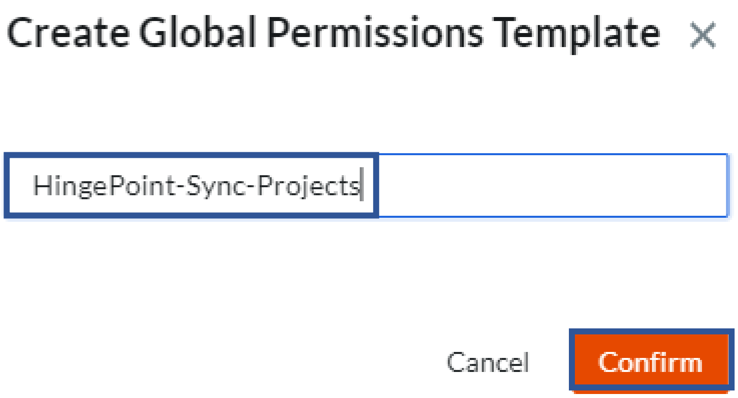
Create Permissions template

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

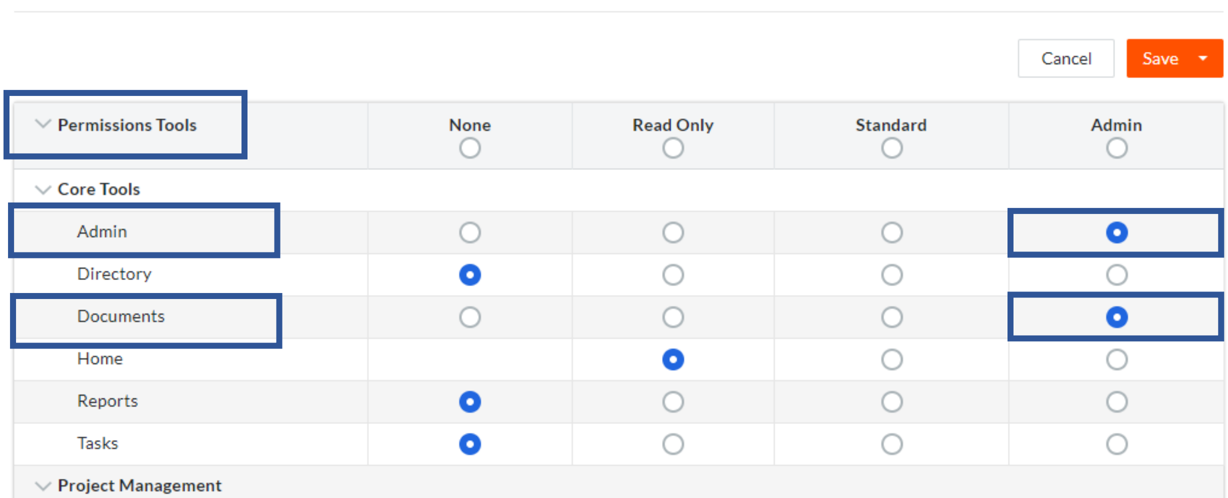


2. Select Project Permissions Template and Select Project (Global) – Assignable to All Projects:

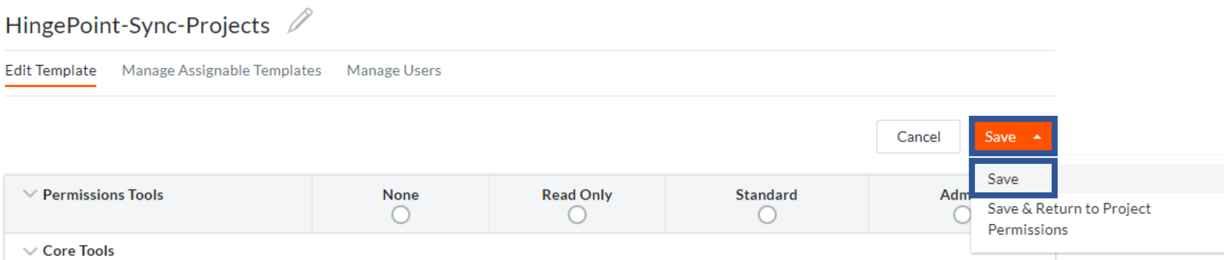
3. Specify the name for permissions template and select Confirm:



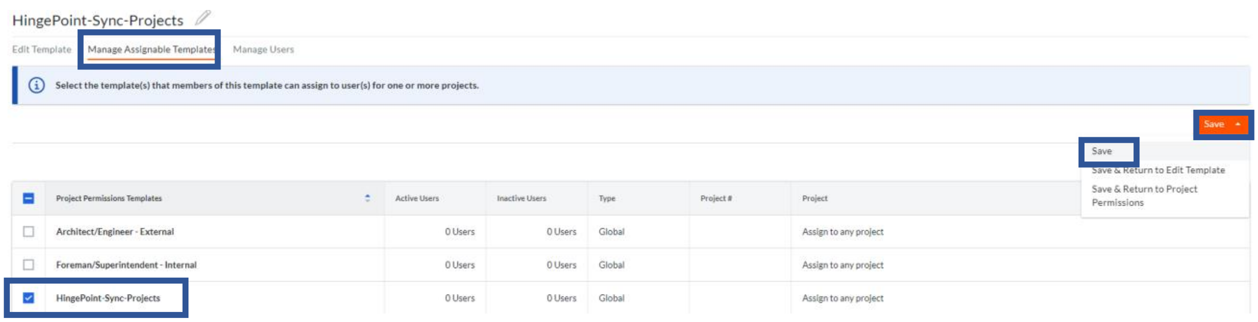
4. Select permissions from the screenshot (all other permissions can be left):



5. Select Save:

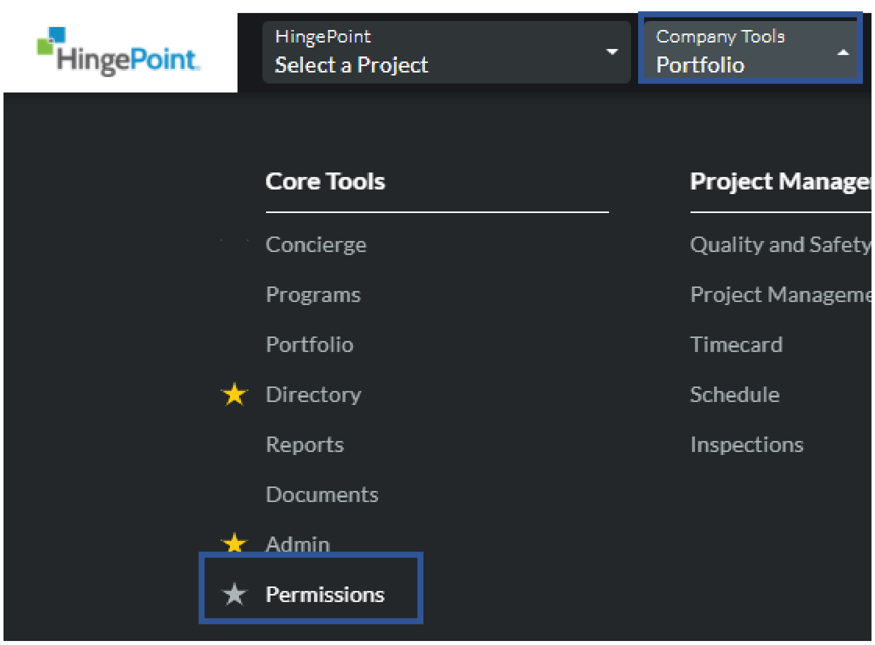


6. Select Manage Assignable Templates tab and select our template. Select Save:

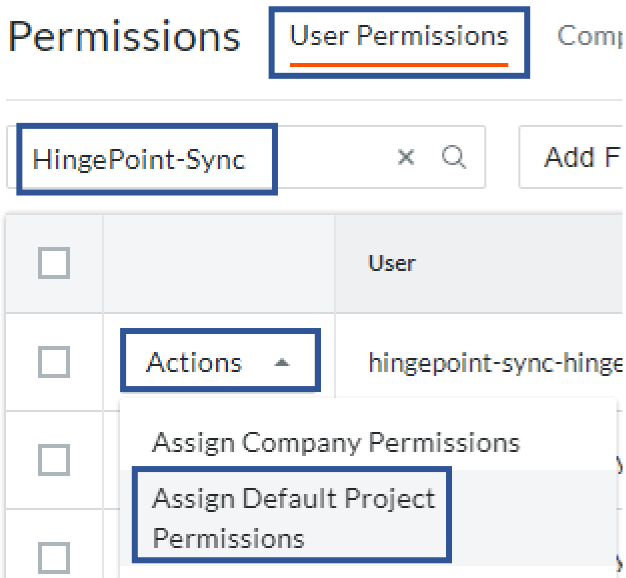


Assign Permissions Template for Service Account

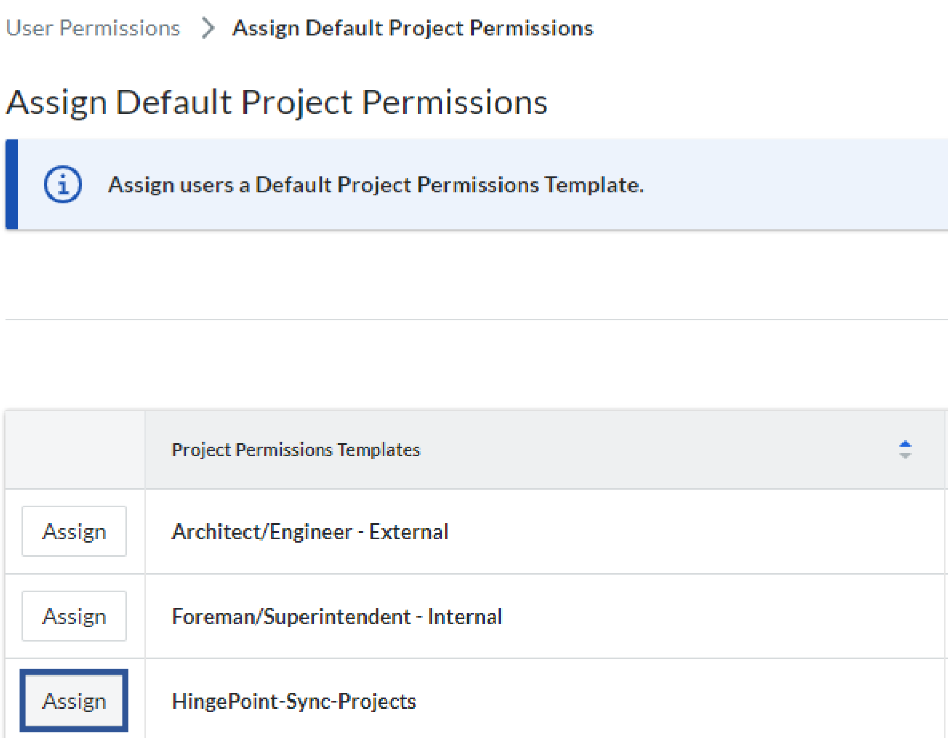
1. Open your Procore Company (https://app.procore.com/) and select Permissions in Company Tools:



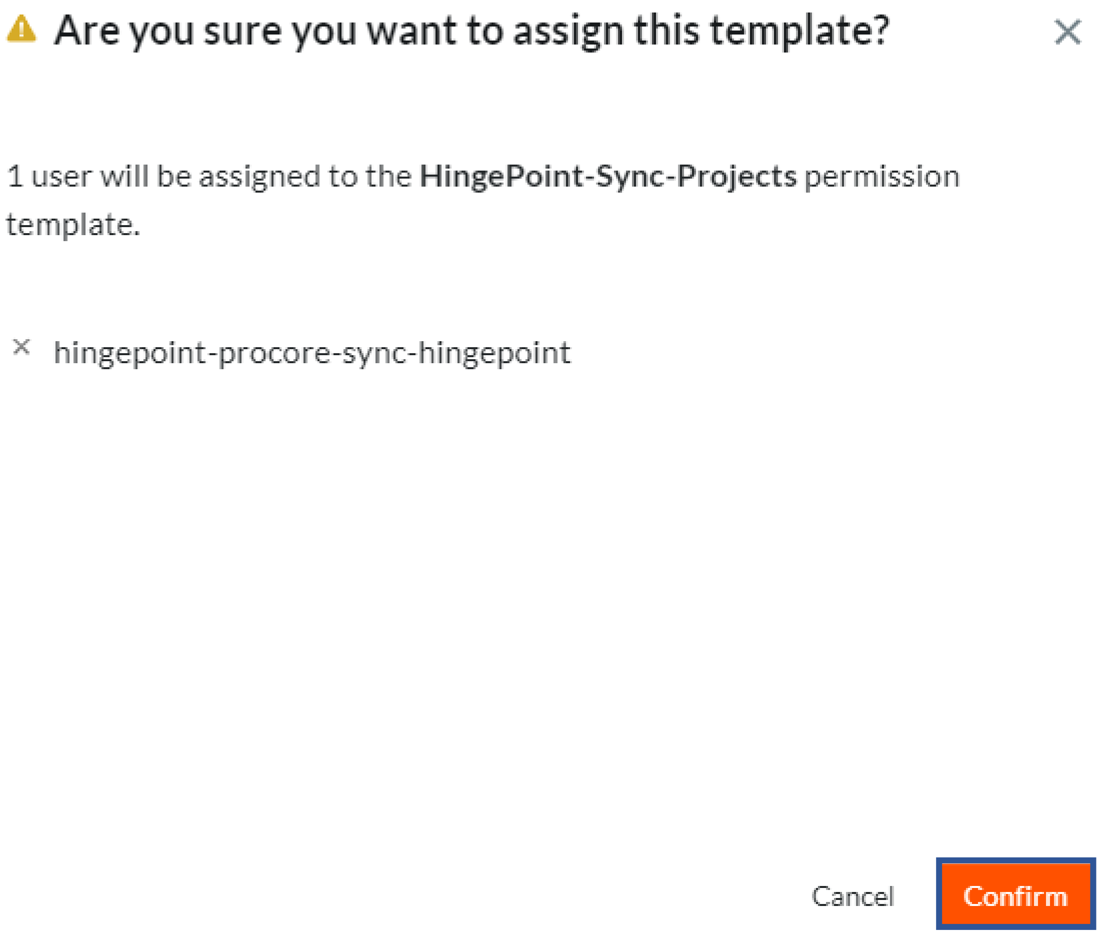
2. On the User Permissions tab select our Service Account created in the topic above and select Assign Default Project Permissions:



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



4. Select Confirm:

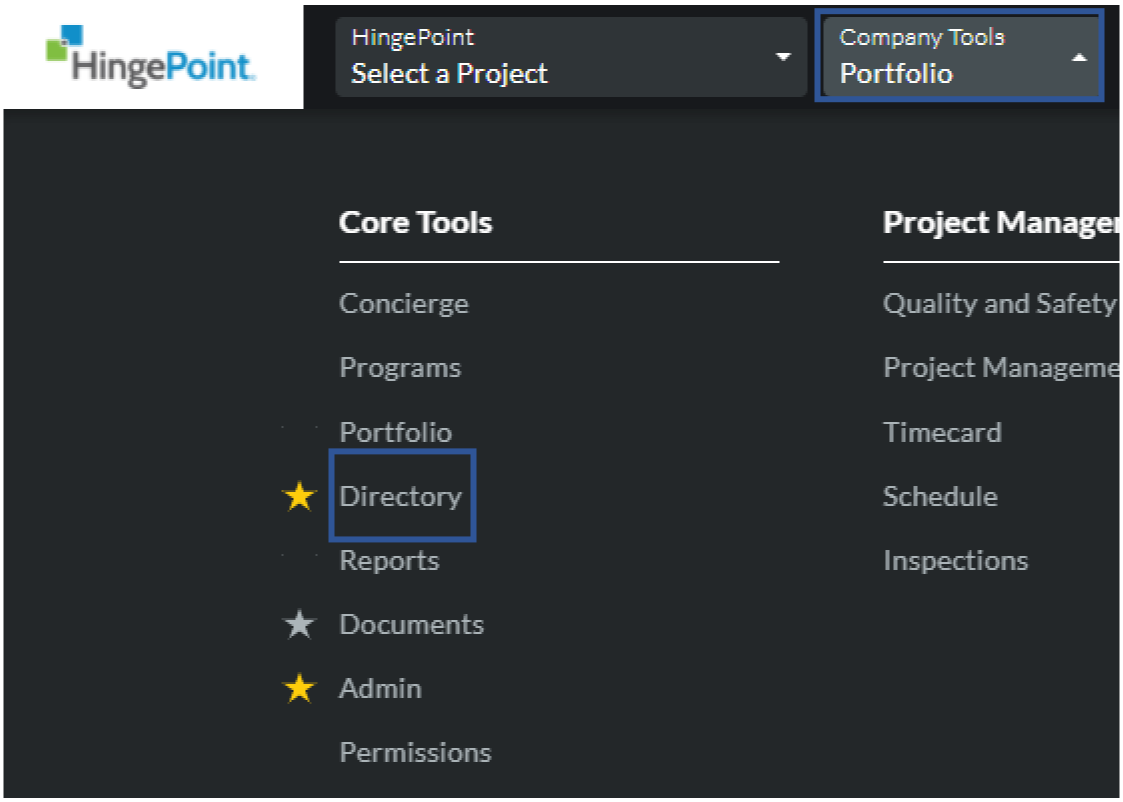


Assign permissions for Service Account in the Procore.

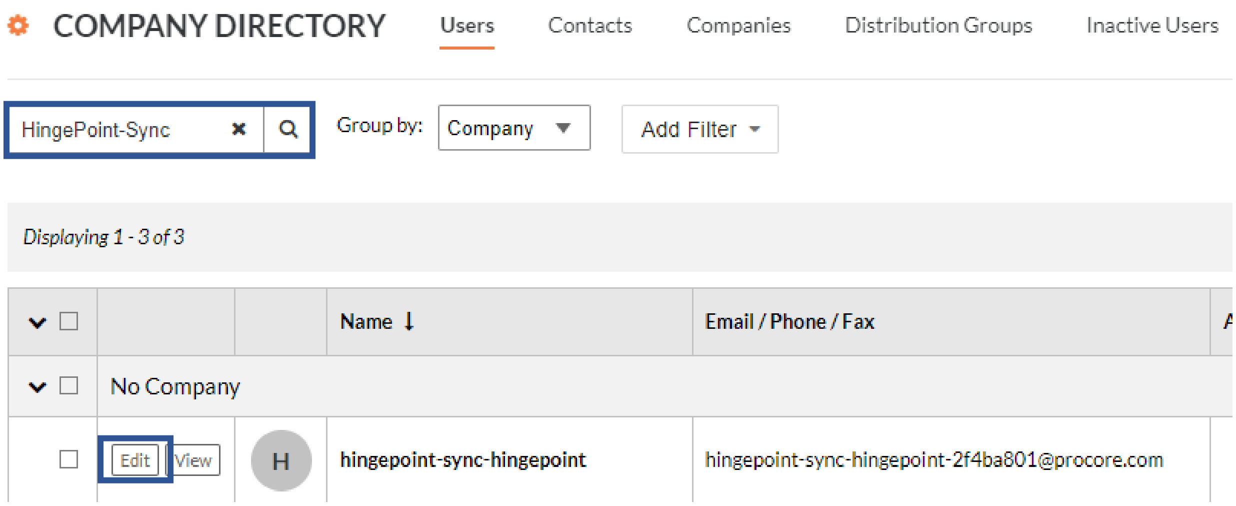
The articles from below described how to assign permissions for Procore Service Account

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

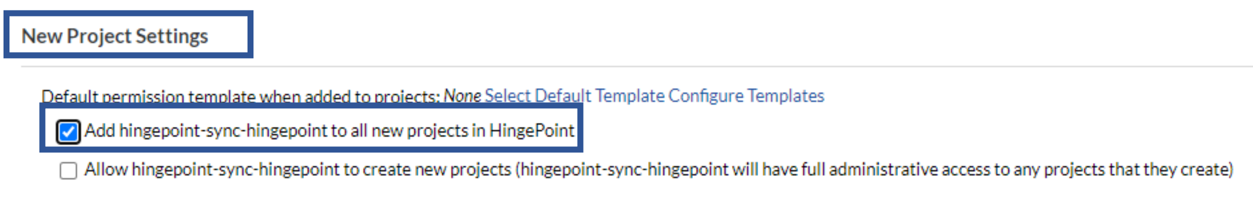
1. Open your Procore Company (https://app.procore.com/) and select Directory in Company Tools:



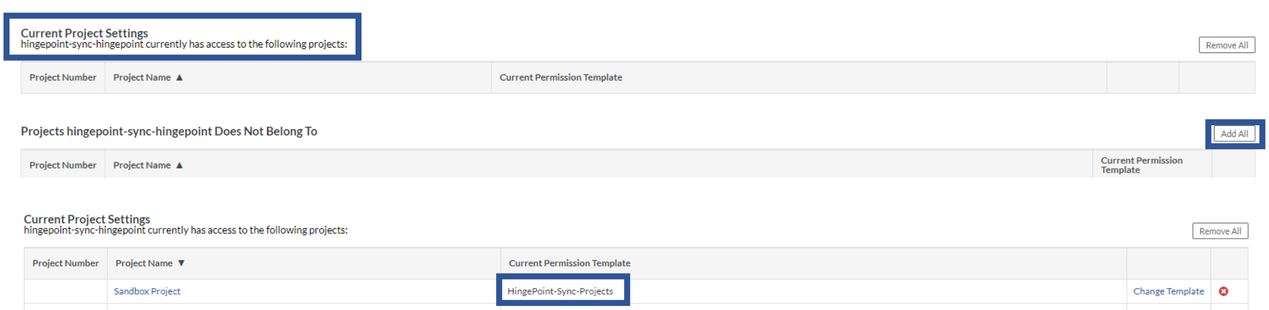
2. Find Service Account that was created in the previous topic and select Edit:



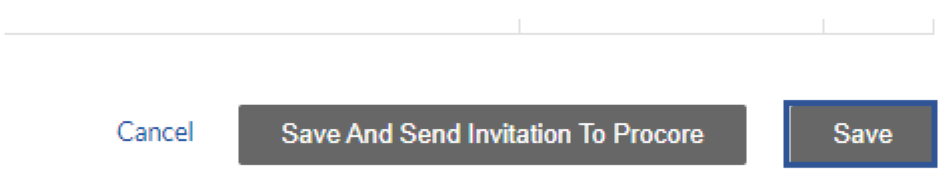
3. Provide access to new projects if you plan sync new projects:



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



5. Select Save:



SharePoint Credentials

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

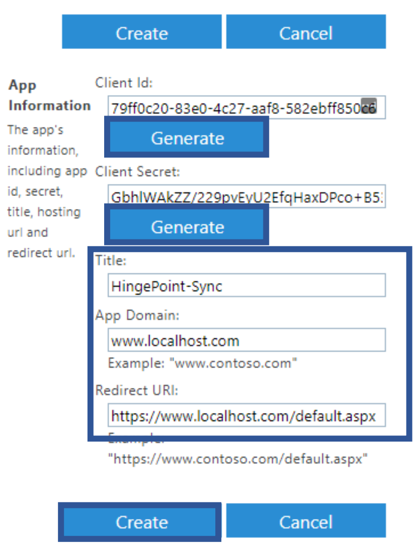
App registration

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

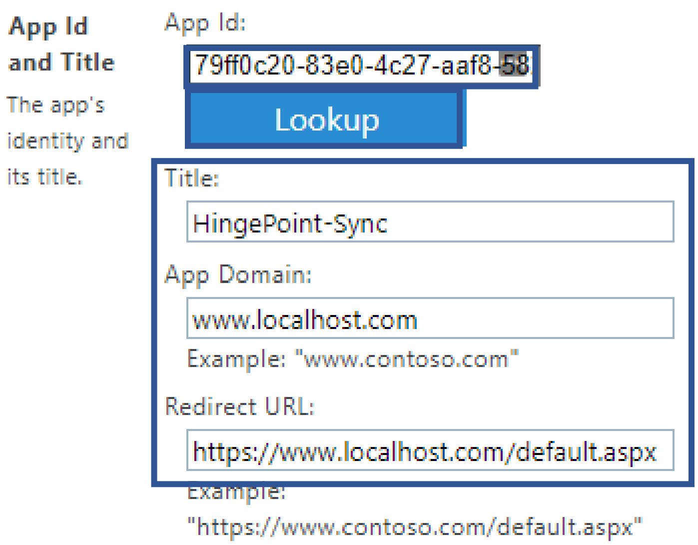


3. Select Ok in the next screen.

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://hingepoint-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):

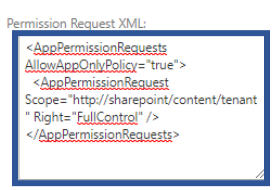


3. Put below settings to Permission Request XML:

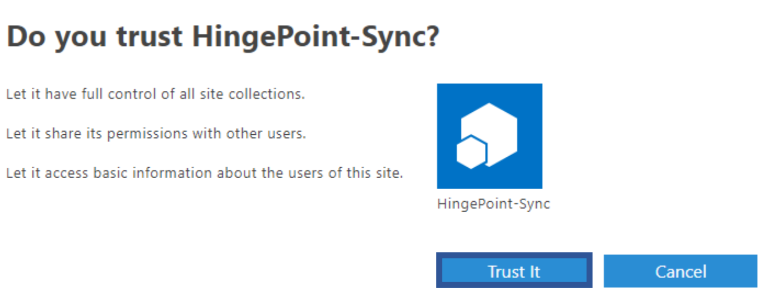
<AppPermissionRequests AllowAppOnlyPolicy="true">

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

</AppPermissionRequests>



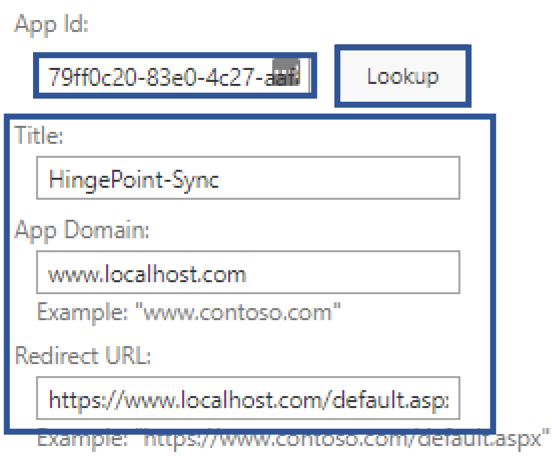
4. Select Create and Trust It in the next screen:



HingePoint

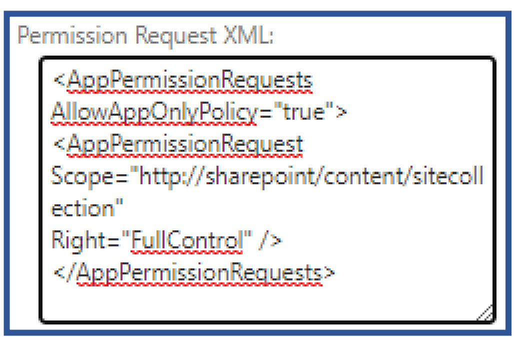
Assign permissions for Site Wide (for a particular site)

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):

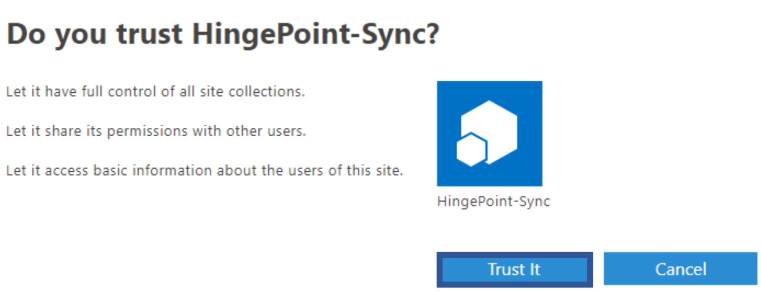


3. Put below settings to Permission Request XML:

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



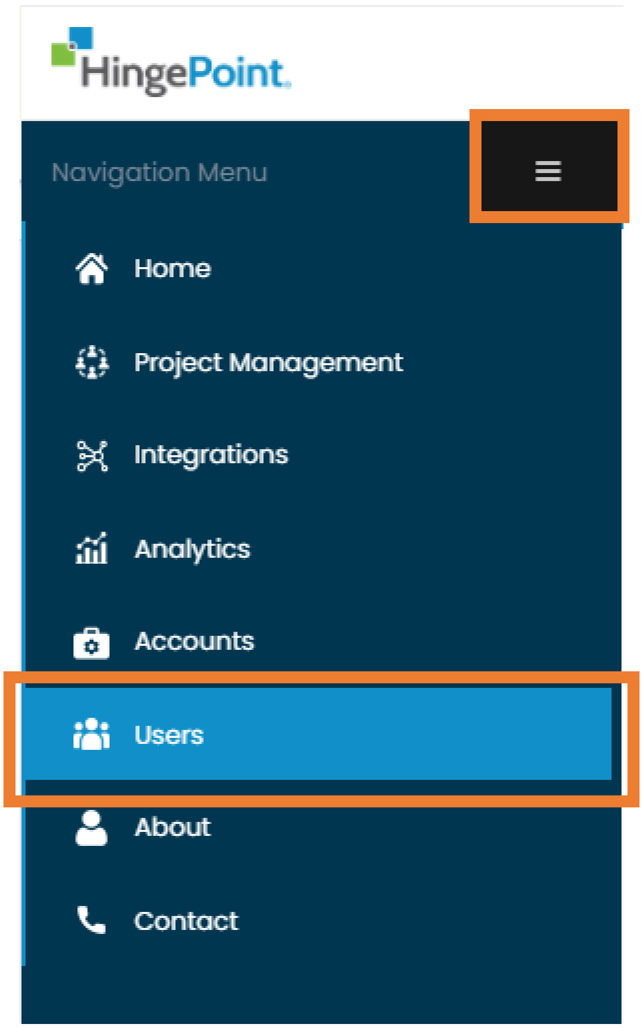
4. Select Create and Trust It in the next screen:



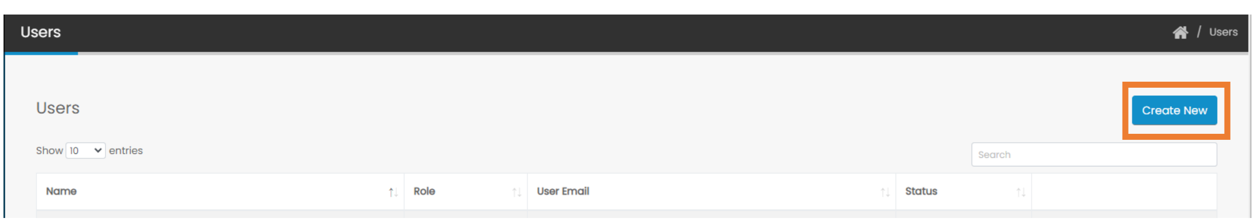
HingePoint

Add additional users from management portal.

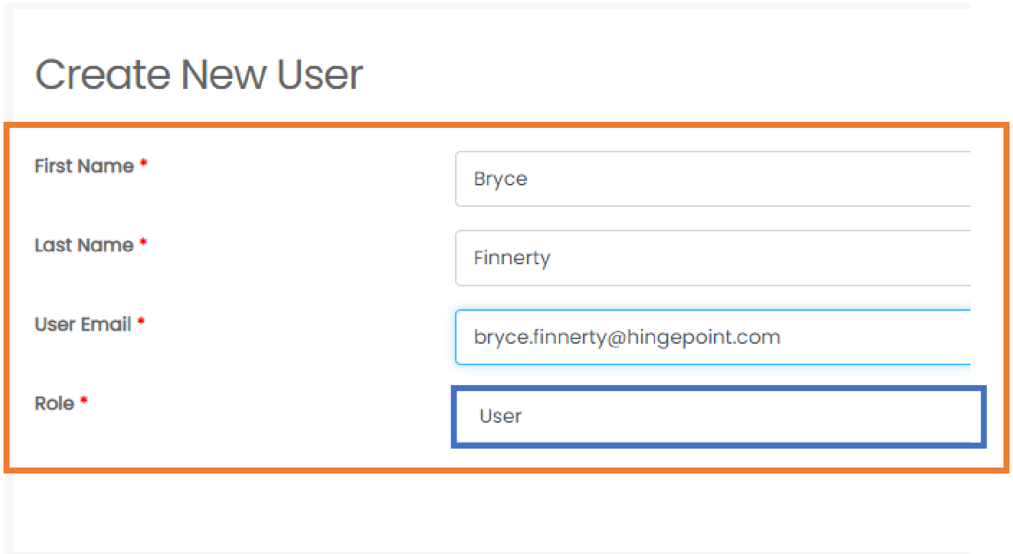
1. Login to HingePoint Sync service management portal as using company administrator account.
2. Select Users in the Navigation Menu



3. Select Create New:



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



5. Select Save: