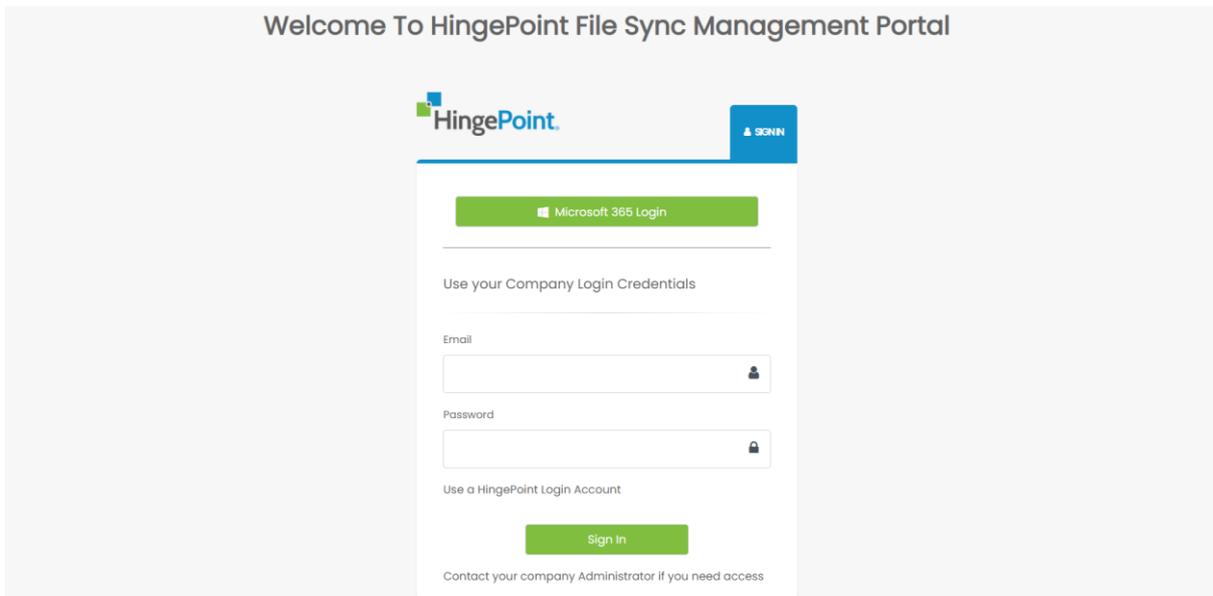


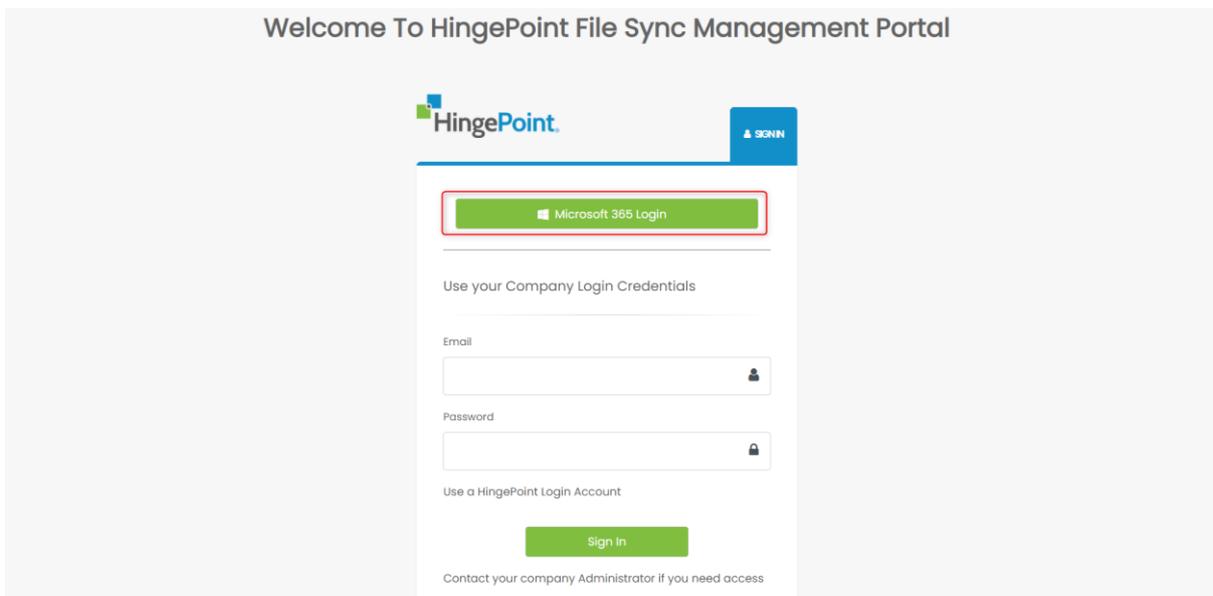
PROCORE FILE SYNC MANAGEMENT CUSTOMER ADMIN USER MANUAL

1. Login:

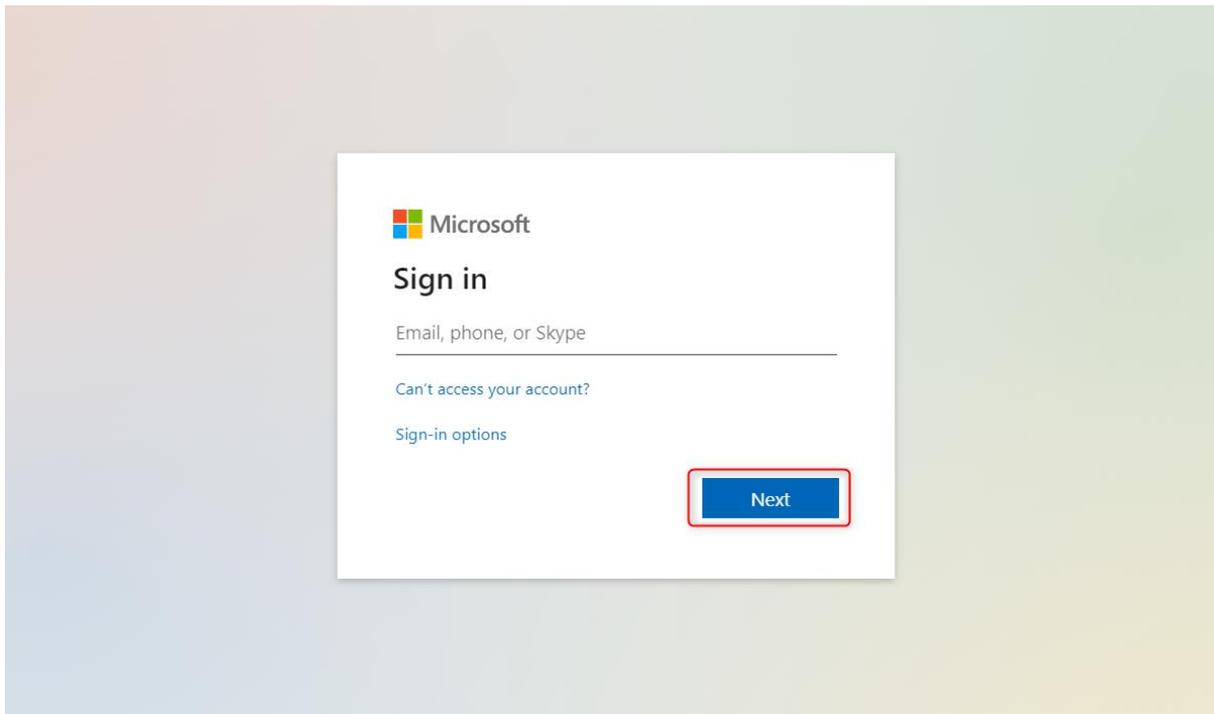
Step 1: Navigate to Management Portal site using the URL <https://filesync.hingepoint.com/>



Step 2: Click on Microsoft 365 Login button to login with your Microsoft account.



Step 3: Enter your credentials and click on next.



Step 4: The Home Page is displayed.

A screenshot of the File Sync Management Portal home page. The page has a dark blue header with the HingePoint logo on the left, the text "File Sync Management Portal - Oks Test" in the center, and a user profile "syed.shadab@star-knowledge.org" on the right. Below the header is a navigation bar with "Home" selected. The main content area features a dashboard with a donut chart showing "5.1% Completed" and "94.9% Not Started", and a "Connections 39" widget. Below these is a "Connections" table with a search bar and a dropdown menu set to "Show 10 entries".

Project Name	Initial Sync Start	File Location 1	File Location 2	Status
Project 1	03/09/2021	Windows	SharePoint	Not Started
Project 1	03/09/2021	SharePoint	Windows	Not Started
Project 1	03/09/2021	Procure	Windows	Not Started
Project 1	03/09/2021	Procure	SharePoint	Not Started
Project 1	03/09/2021	Windows	Procure	Not Started
Project 1	03/09/2021	SharePoint	Procure	Not Started

2. Integration:

2.1 Create New Integration:

Step 1: Click on integration from the left navigation bar.

NOTE: Only Account Admins will be able to access the integration screen.

	Initial Sync Start	File Location 1	File Location 2
	03/09/2021	Windows	SharePoint
	03/09/2021	SharePoint	Windows
	03/09/2021	ProcCore	Windows
	03/09/2021	ProcCore	SharePoint
	03/09/2021	Windows	ProcCore

Step 2: Click on create new button.

Name	System Type	Created Date	Status	No of Projects	No of Connections	
ProcCore Integration	SharePoint	02/24/2021 02:36:34 PM	None	0	0	Edit Copy Delete
ProcCore Integration Test1	SharePoint	02/24/2021 05:53:38 PM	None	0	0	Edit Copy Delete
ProcCore Integration Test2	SharePoint	02/24/2021 06:39:30 PM	None	0	0	Edit Copy Delete
ProcCore Integration Test2- Cur	ProcCore	02/25/2021 10:56:14 AM	None	0	0	Edit Copy Delete
Sharepoint Integration Test 1	SharePoint	02/24/2021 01:48:02 PM	None	0	0	Edit Copy Delete
Sharepoint Integration Test 1 Edited	SharePoint	02/24/2021 02:11:29 PM	None	0	0	Edit Copy Delete
Wnldows Test	SharePoint	02/24/2021 06:41:48 PM	None	0	0	Edit Copy Delete

Step 3: Enter the data and click on save.

2.2 Edit an Integration:

Step 1: Click on integration from the left navigation bar.

NOTE: Only Account Admins will be able to access the integration screen.

	Initial Sync Start	File Location 1	File Location 2
	03/09/2021	Windows	SharePoint
	03/09/2021	SharePoint	Windows
	03/09/2021	Procure	Windows
	03/09/2021	Procure	SharePoint
	03/09/2021	Windows	Procure

Step 2: Click on the edit button in the integration table for the integration that needs to be edited.

Name	System Type	Created Date	Status	No of Projects	No of Connections	
ProcCore Integration	SharePoint	02/24/2021 02:36:34 PM	None	0	0	Edit Copy Delete
ProcCore Integration Test1	SharePoint	02/24/2021 05:53:38 PM	None	0	0	Edit Copy Delete
ProcCore Integration Test2	SharePoint	02/24/2021 06:39:30 PM	None	0	0	Edit Copy Delete
ProcCore Integration Test2- Cur	ProcCore	02/25/2021 10:56:14 AM	None	0	0	Edit Copy Delete
SharePoint Integration	SharePoint	02/26/2021 04:16:42 AM	None	0	0	Edit Copy Delete
Sharepoint Integration Test 1	SharePoint	02/24/2021 01:48:02 PM	None	0	0	Edit Copy Delete
Sharepoint Integration Test 1 Edited	SharePoint	02/24/2021 02:11:29 PM	None	0	0	Edit Copy Delete
Wnldows Test	SharePoint	02/24/2021 06:41:48 PM	None	0	0	Edit Copy Delete

Step 3: Update the fields and click on save.

Edit Integration

Name *

Description

System Type *

Sharepoint Web Uri *

SharePoint Client Key *

Sharepoint Client Secret *

2.3 Delete an Integration:

Step 1: Click on integration from the left navigation bar.

NOTE: Only Account Admins will be able to access the integration screen.

File Sync Management Portal – Oks Test

Home

- Home
- Project Management
- Integrations**
- Analytics
- Users
- About
- Contact

5.1% Completed
94.9% Not Started

Connections 39

	Initial Sync Start	File Location 1	File Loc
	03/09/2021	Windows	SharePc
	03/09/2021	SharePoint	Window
	03/09/2021	Procore	Window
	03/09/2021	Procore	SharePc
	03/09/2021	Windows	Procore

Step 2: Click on the delete button in the integration table for the integration that needs to be deleted.

Integrations

Create New

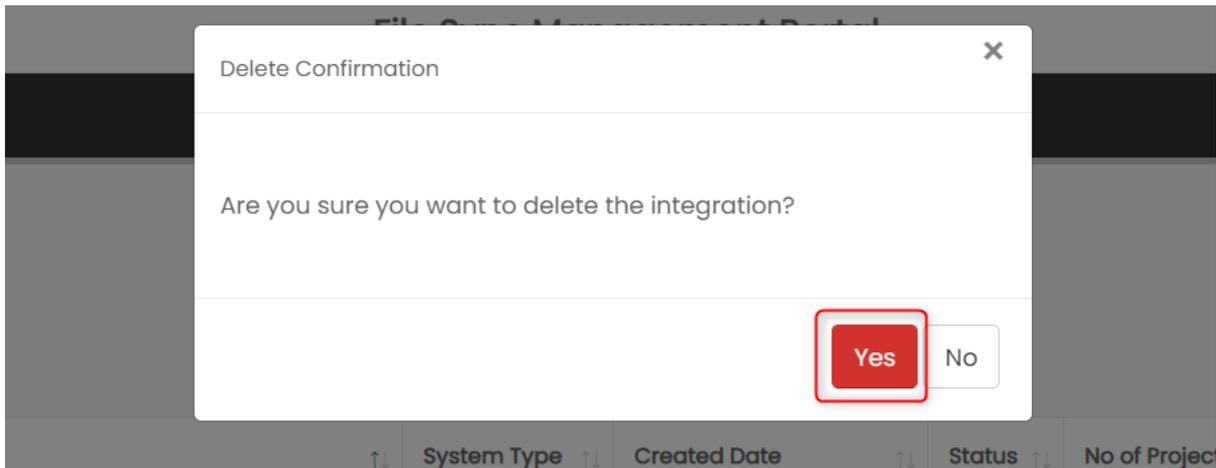
Show 10 entries

Name	System Type	Created Date	Status	No of Projects	No of Connections	
Procure Integration	SharePoint	02/24/2021 02:36:34 PM	None	0	0	Edit Copy Delete
Procure Integration Test1	SharePoint	02/24/2021 05:53:38 PM	None	0	0	Edit Copy Delete
Procure Integration Test2	SharePoint	02/24/2021 06:39:30 PM	None	0	0	Edit Copy Delete
Procure Integration Test2- Cur	Procore	02/25/2021 10:56:14 AM	None	0	0	Edit Copy Delete
SharePoint Integration	SharePoint	02/26/2021 04:16:42 AM	None	0	0	Edit Copy Delete
Sharepoint Integration Test 1	SharePoint	02/24/2021 01:48:02 PM	None	0	0	Edit Copy Delete
Sharepoint Integration Test 1 Edited	SharePoint	02/24/2021 02:11:29 PM	None	0	0	Edit Copy Delete
Wnidows Test	SharePoint	02/24/2021 06:41:48 PM	None	0	0	Edit Copy Delete

Showing 1 to 8 of 8 entries

Previous 1 Next

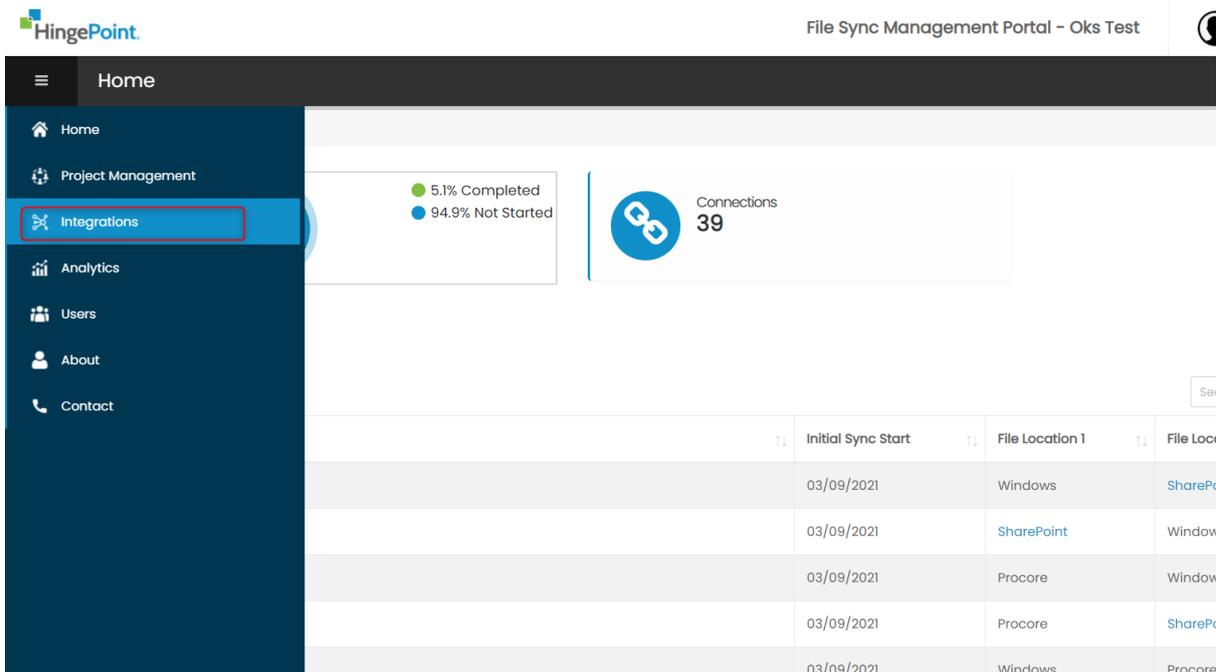
Step 3: Click on yes to delete the integration.



2.4 View an Integration:

Step 1: Click on integration from the left navigation bar.

NOTE: Only Account Admins will be able to access the integration screen.



Step 2: Click on the name of the integration which you want to view

Name	System Type	Created Date	Status	No of Projects	No of Connections	
ProcCore Integration	SharePoint	02/24/2021 02:36:34 PM	None	0	0	Edit Copy Delete
ProcCore Integration Test1	SharePoint	02/24/2021 05:53:38 PM	None	0	0	Edit Copy Delete
ProcCore Integration Test2	SharePoint	02/24/2021 06:39:30 PM	None	0	0	Edit Copy Delete
ProcCore Integration Test2- Cur	ProcCore	02/25/2021 10:56:14 AM	None	0	0	Edit Copy Delete
SharePoint Integration	SharePoint	02/26/2021 04:16:42 AM	None	0	0	Edit Copy Delete
Sharepoint Integration Test 1	SharePoint	02/24/2021 01:48:02 PM	None	0	0	Edit Copy Delete
Sharepoint Integration Test 1 Edited	SharePoint	02/24/2021 02:11:29 PM	None	0	0	Edit Copy Delete
Wnidows Test	SharePoint	02/24/2021 06:41:48 PM	None	0	0	Edit Copy Delete

Step 3: The View Screen is displayed

View Integration

Name: SharePoint Integration

Description: description

System Type: SharePoint

Sharepoint Web Url:

SharePoint Client Key:

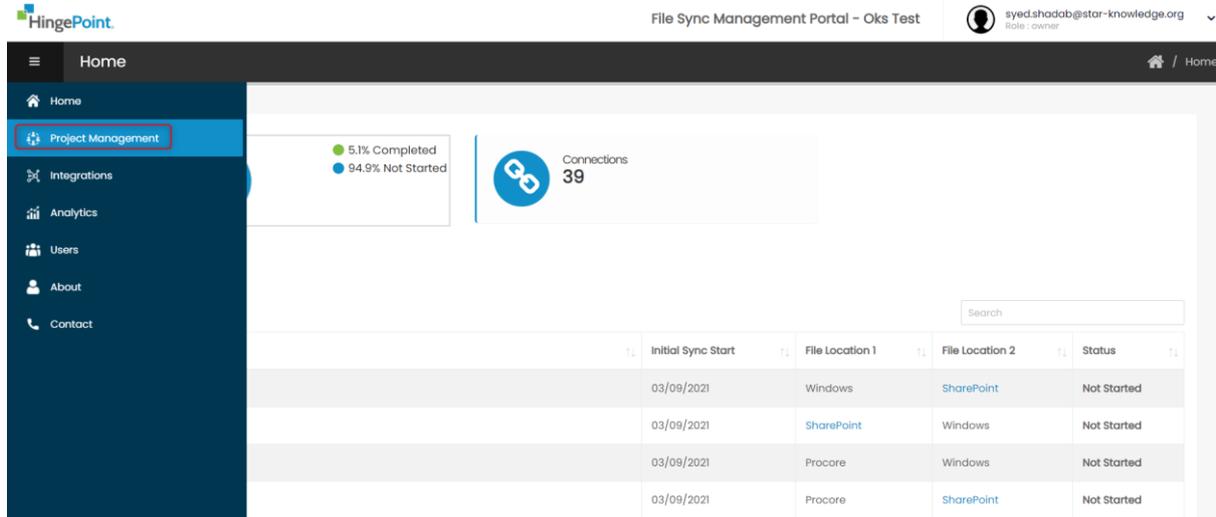
Sharepoint Client Secret:

Buttons: Back, Delete, Edit

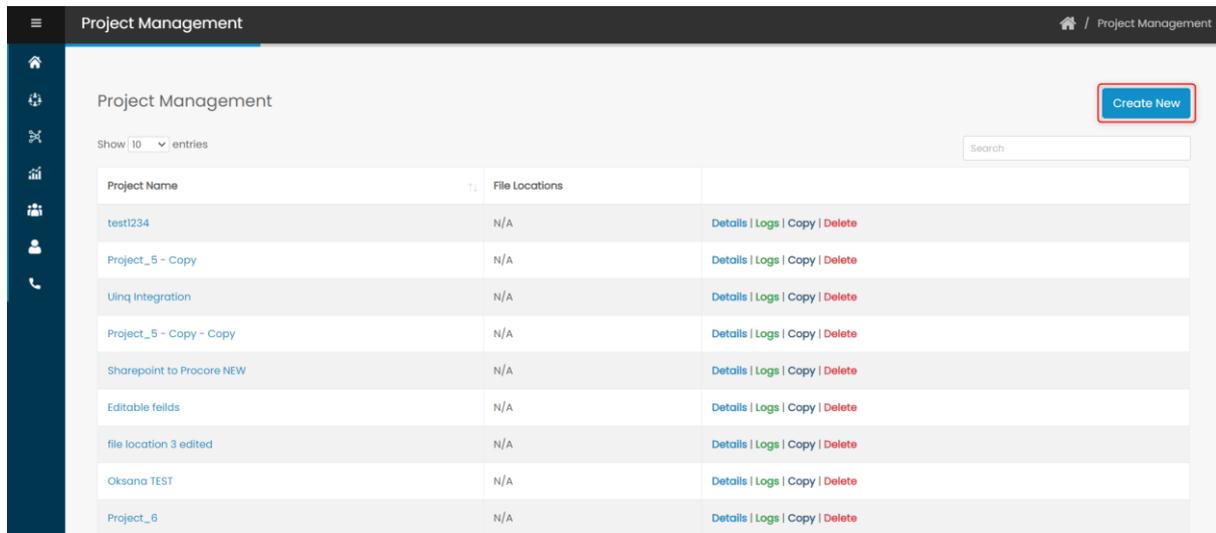
3. Project Management:

3.1 Create a Project:

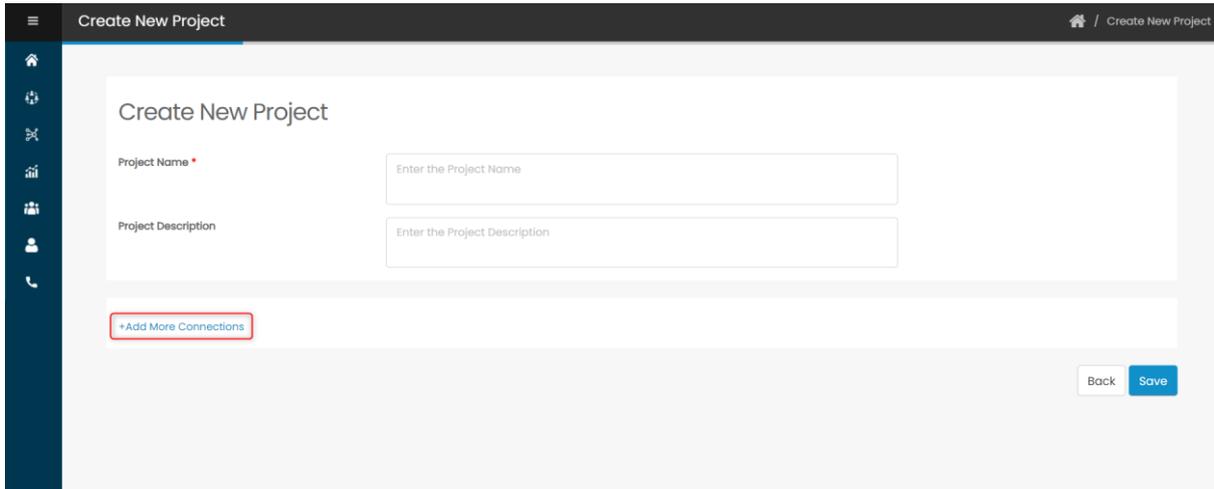
Step 1: Click on Project Management from the left navigation bar.



Step 2: Click on create new button.



Step 3: Project Create Screen is displayed. Click on add connection to add a connection to the data.



Create New Project

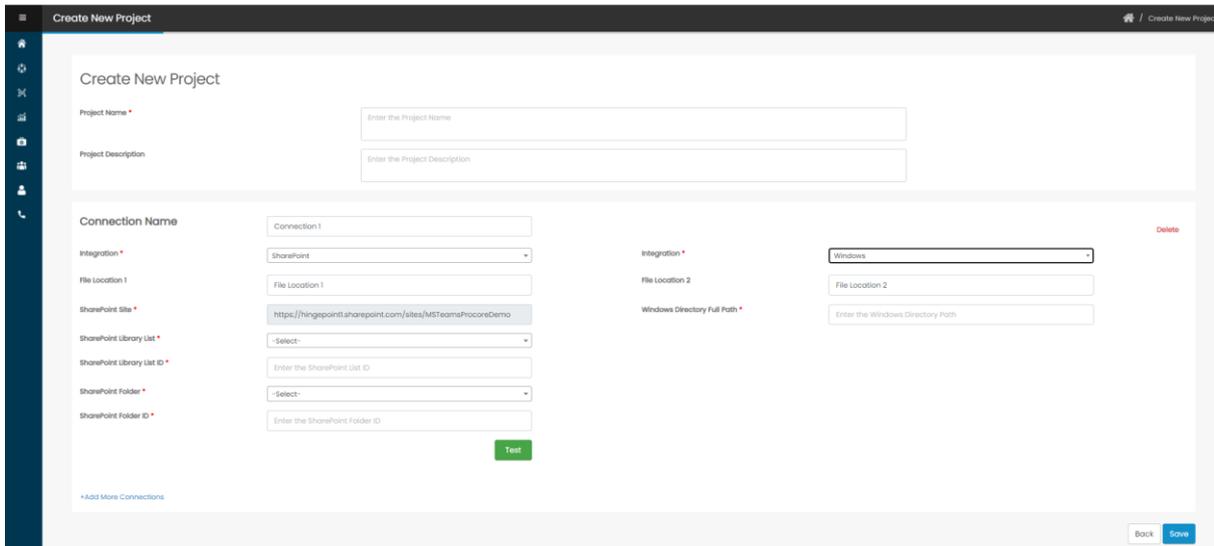
Project Name *

Project Description

+Add More Connections

Back Save

Step 4: Enter the data and click on save.



Create New Project

Project Name *

Project Description

Connection Name Delete

Integration *

File Location 1

SharePoint Site *

SharePoint Library List *

SharePoint Library List ID *

SharePoint Folder *

SharePoint Folder ID *

Integration *

File Location 2

Windows Directory Full Path *

Test

+Add More Connections

Back Save

3.2 Edit a Project:

Step 1: Click on Project Management from the left navigation bar.

File Sync Management Portal - Oks Test

syed.shadab@star-knowledge.org
Role: owner

Home

5.1% Completed
94.9% Not Started

Connections 39

Initial Sync Start	File Location 1	File Location 2	Status
03/09/2021	Windows	SharePoint	Not Started
03/09/2021	SharePoint	Windows	Not Started
03/09/2021	Procure	Windows	Not Started
03/09/2021	Procure	SharePoint	Not Started

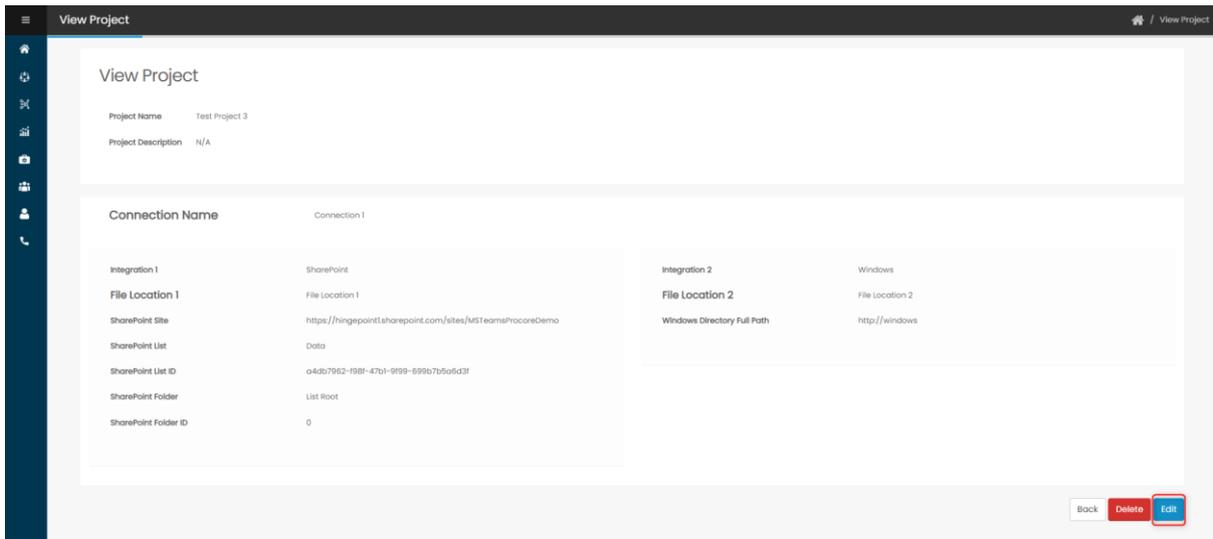
Step 2: Click on the Details button in the projects table for the project that needs to be edited.

Project Management

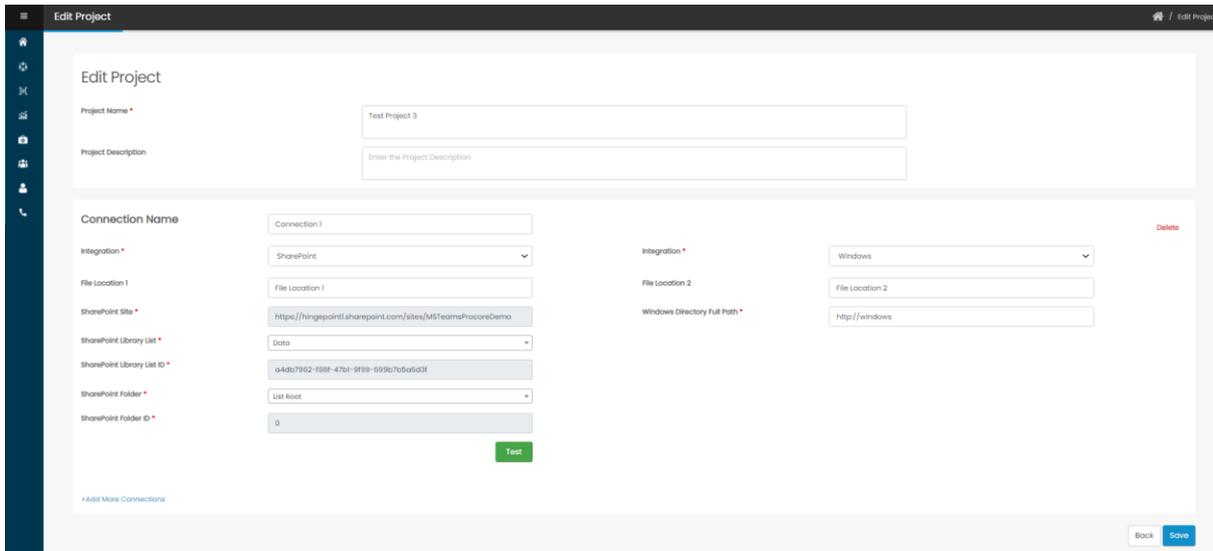
Show 10 entries

Project Name	File Locations	Actions
test1234	N/A	Details Logs Copy Delete
Project_5 - Copy	N/A	Details Logs Copy Delete
Ulnq Integration	N/A	Details Logs Copy Delete
Project_5 - Copy - Copy	N/A	Details Logs Copy Delete
Sharepoint to Procure NEW	N/A	Details Logs Copy Delete
Editable feilds	N/A	Details Logs Copy Delete
file location 3 edited	N/A	Details Logs Copy Delete
Oksana TEST	N/A	Details Logs Copy Delete
Project_6	N/A	Details Logs Copy Delete
File Location 4 Test	N/A	Details Logs Copy Delete

Step 4: Details screen is displayed and click on edit.



Step 3: Update the fields which needs to be updated and click on save.



3.3 Delete a Project:

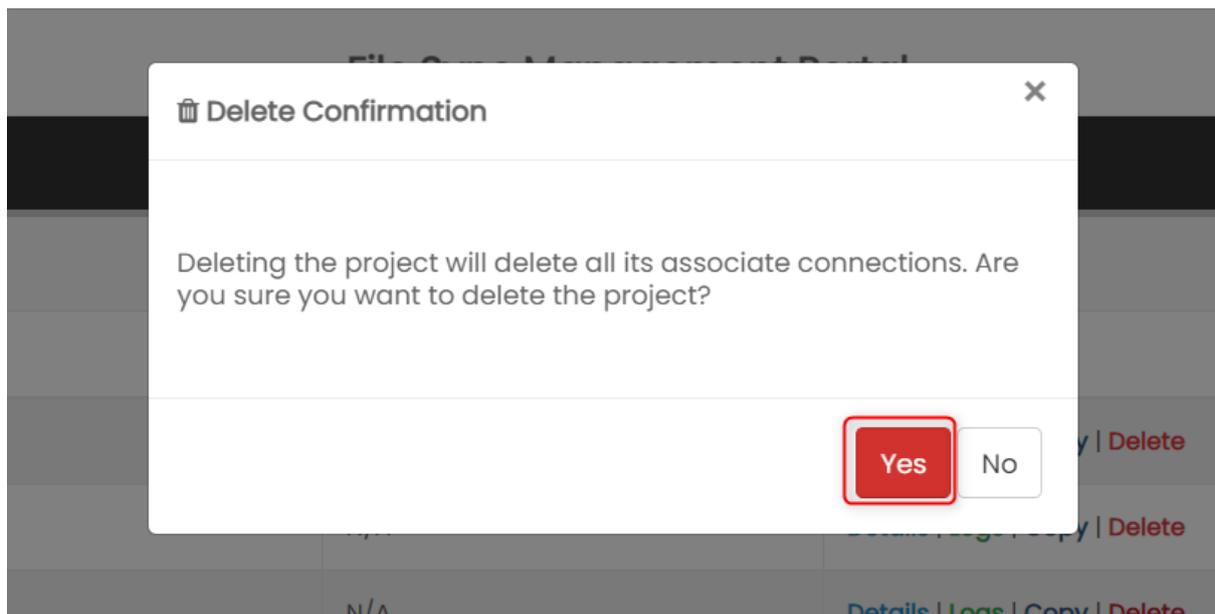
Step 1: Click on Project Management from the left navigation bar.

Initial Sync Start	File Location 1	File Location 2	Status
03/09/2021	Windows	SharePoint	Not Started
03/09/2021	SharePoint	Windows	Not Started
03/09/2021	Procure	Windows	Not Started
03/09/2021	Procure	SharePoint	Not Started

Step 2: Click on the delete button in the projects table for the project that needs to be deleted.

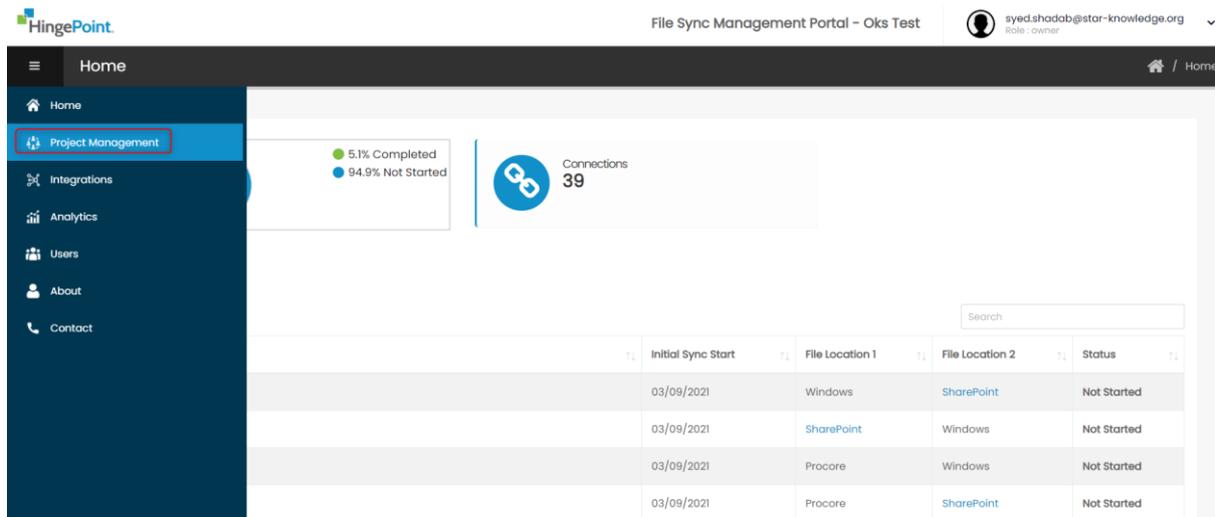
Project Name	File Locations	Actions
test1234	N/A	Details Logs Copy Delete
Project_5 - Copy	N/A	Details Logs Copy Delete
Ulnq Integration	N/A	Details Logs Copy Delete
Project_5 - Copy - Copy	N/A	Details Logs Copy Delete
Sharepoint to Procure NEW	N/A	Details Logs Copy Delete
Editable felids	N/A	Details Logs Copy Delete
file location 3 edited	N/A	Details Logs Copy Delete
Oksana TEST	N/A	Details Logs Copy Delete
Project_6	N/A	Details Logs Copy Delete
File Location 4 Test	N/A	Details Logs Copy Delete

Step 3: Click on yes to delete the integration.

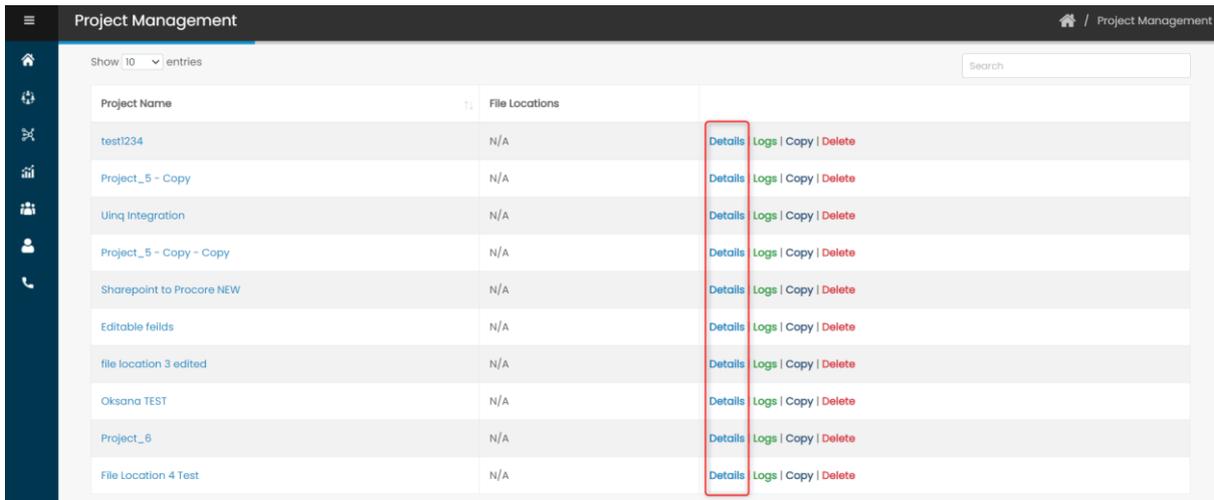


3.4 View a Project:

Step 1: Click on Project Management from the left navigation bar.



Step 2: Click on the details button in the projects table for the project that needs to be viewed.

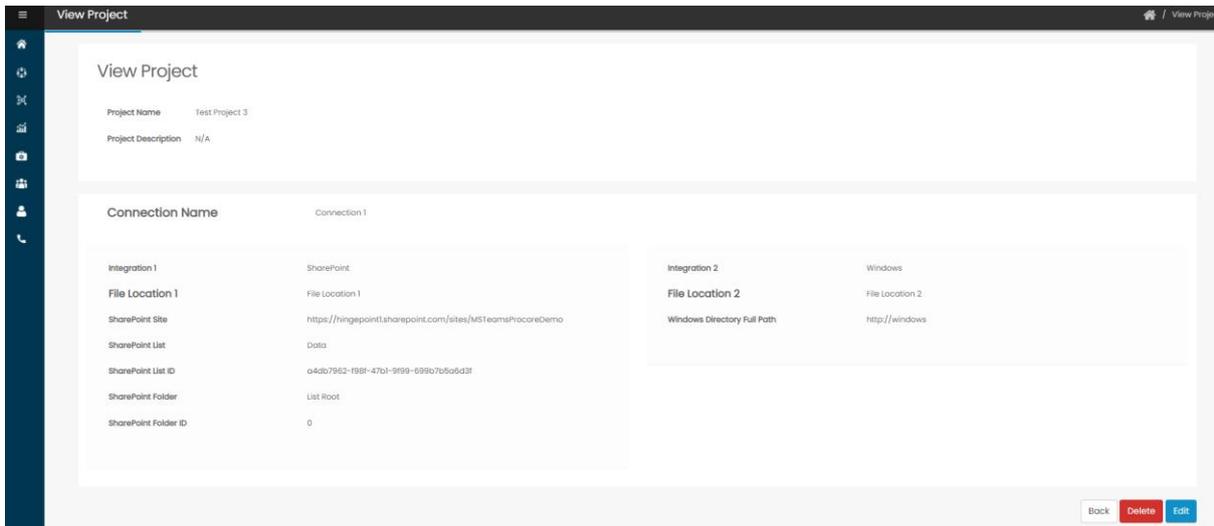


Project Management

Show 10 entries

Project Name	File Locations	
test1234	N/A	Details Logs Copy Delete
Project_5 - Copy	N/A	Details Logs Copy Delete
Ulnq Integration	N/A	Details Logs Copy Delete
Project_5 - Copy - Copy	N/A	Details Logs Copy Delete
Sharepoint to Procore NEW	N/A	Details Logs Copy Delete
Editable feilds	N/A	Details Logs Copy Delete
file location 3 edited	N/A	Details Logs Copy Delete
Oksana TEST	N/A	Details Logs Copy Delete
Project_6	N/A	Details Logs Copy Delete
File Location 4 Test	N/A	Details Logs Copy Delete

Step 3: Details Screen is displayed.



View Project

Project Name Test Project 3

Project Description N/A

Connection Name Connection 1

Integration 1	Integration 2
SharePoint	Windows
File Location 1	File Location 2
SharePoint Site	Windows Directory Full Path
SharePoint List	http://windows
SharePoint List ID	
SharePoint Folder	
SharePoint Folder ID	

Back Delete Edit

3.5 Activate a Sync:

Step 1: Click on Project Management from the left navigation bar.

The screenshot shows the HingePoint File Sync Management Portal. The left navigation bar is expanded, and 'Project Management' is highlighted with a red box. The main content area displays a summary of sync progress: 5.1% Completed and 94.9% Not Started. A 'Connections' widget shows 39 connections. Below this is a table of sync projects.

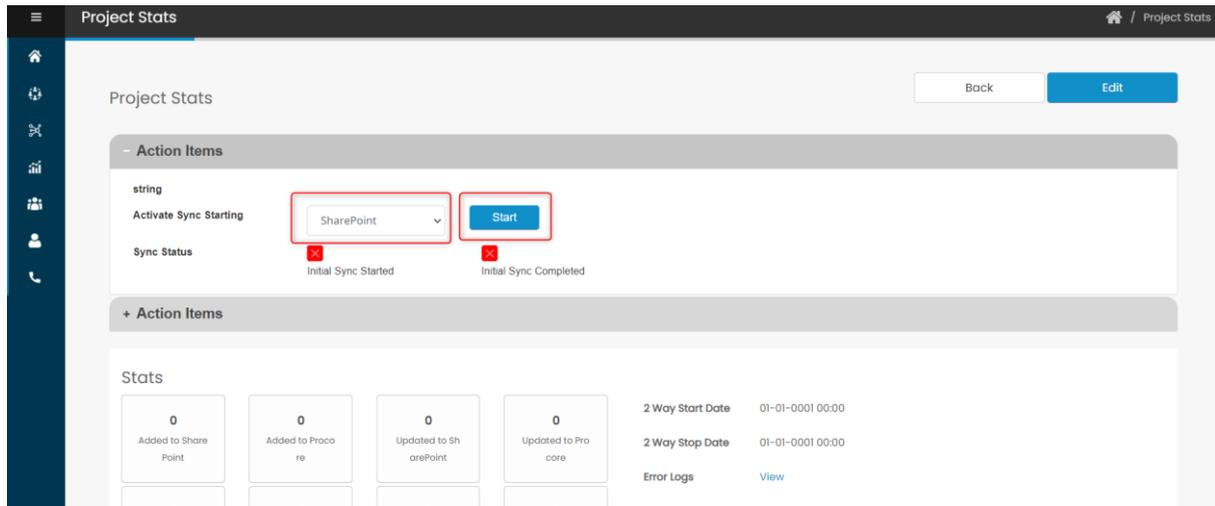
	Initial Sync Start	File Location 1	File Location 2	Status
	03/09/2021	Windows	SharePoint	Not Started
	03/09/2021	SharePoint	Windows	Not Started
	03/09/2021	Procure	Windows	Not Started
	03/09/2021	Procure	SharePoint	Not Started

Step 2: Click on the name of the project in the project tables whose sync you want to activate.

This screenshot is identical to the one in Step 1, showing the HingePoint File Sync Management Portal with the 'Project Management' navigation bar highlighted. It displays the same sync progress summary, connections count, and table of sync projects.

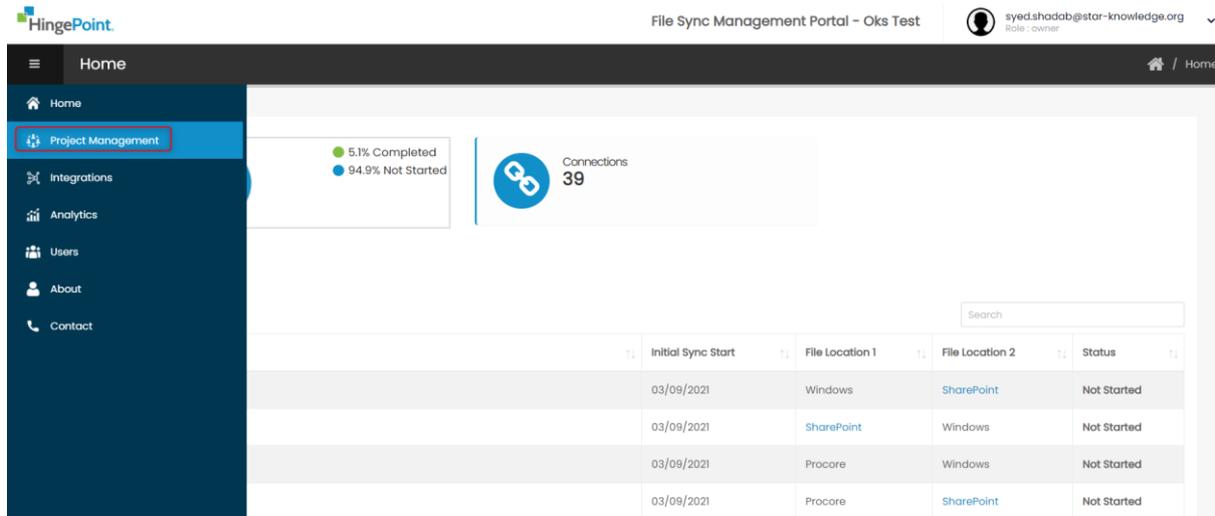
	Initial Sync Start	File Location 1	File Location 2	Status
	03/09/2021	Windows	SharePoint	Not Started
	03/09/2021	SharePoint	Windows	Not Started
	03/09/2021	Procure	Windows	Not Started
	03/09/2021	Procure	SharePoint	Not Started

Step 3: the project stats screen is displayed. Select the endpoint for which you want to activate the sync and click on start.



3.6 Deactivate a Sync:

Step 1: Click on Project Management from the left navigation bar.



Step 2: Click on the name of the project in the project tables whose sync you want to deactivate.

Project Management

Show 10 entries

Project Name	File Locations	
test1234	N/A	Details Logs Copy Delete
Project_5 - Copy	N/A	Details Logs Copy Delete
Ulnq Integration	N/A	Details Logs Copy Delete
Project_5 - Copy - Copy	N/A	Details Logs Copy Delete
Sharepoint to Procore NEW	N/A	Details Logs Copy Delete
Editable feilids	N/A	Details Logs Copy Delete
file location 3 edited	N/A	Details Logs Copy Delete
Oksana TEST	N/A	Details Logs Copy Delete
Project_6	N/A	Details Logs Copy Delete
File Location 4 Test	N/A	Details Logs Copy Delete

Showing 1 to 10 of 28 entries

Previous 1 2 3 Next

Step 3: the project stats screen is displayed. Select the endpoint for which you want to deactivate the sync and click on stop.

Project Stats

Back Edit

- Action Items

string

Activate Sync Starting SharePoint Stop

Sync Status Initial Sync Started Initial Sync Completed

+ Action Items

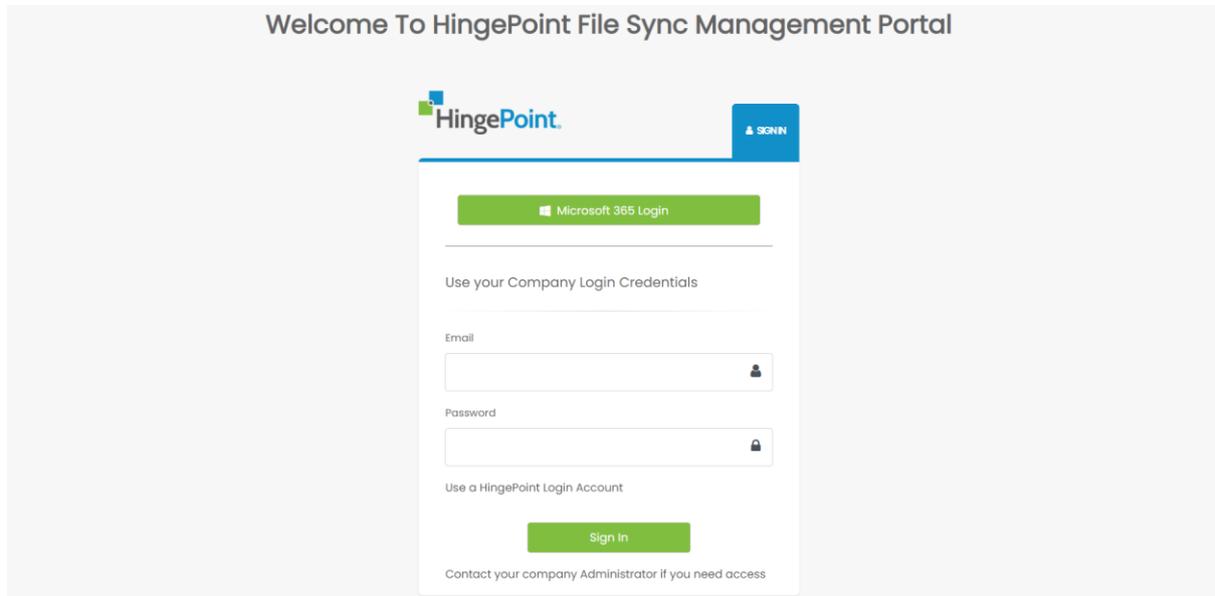
Stats

0	0	0	0	2 Way Start Date	01-01-0001 00:00
Added to Share Point	Added to Procore	Updated to SharePoint	Updated to Procore	2 Way Stop Date	01-01-0001 00:00
0	0	1	1	Error Logs	View
				2 Way Sync Status	ON

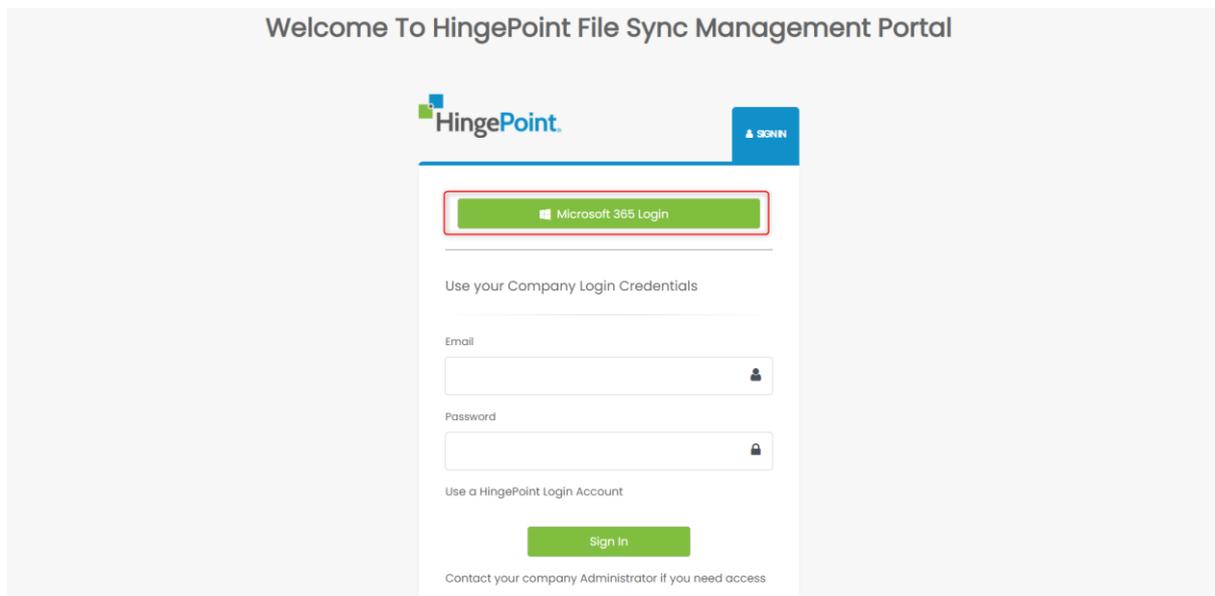
4. Users:

4.1 Create a User:

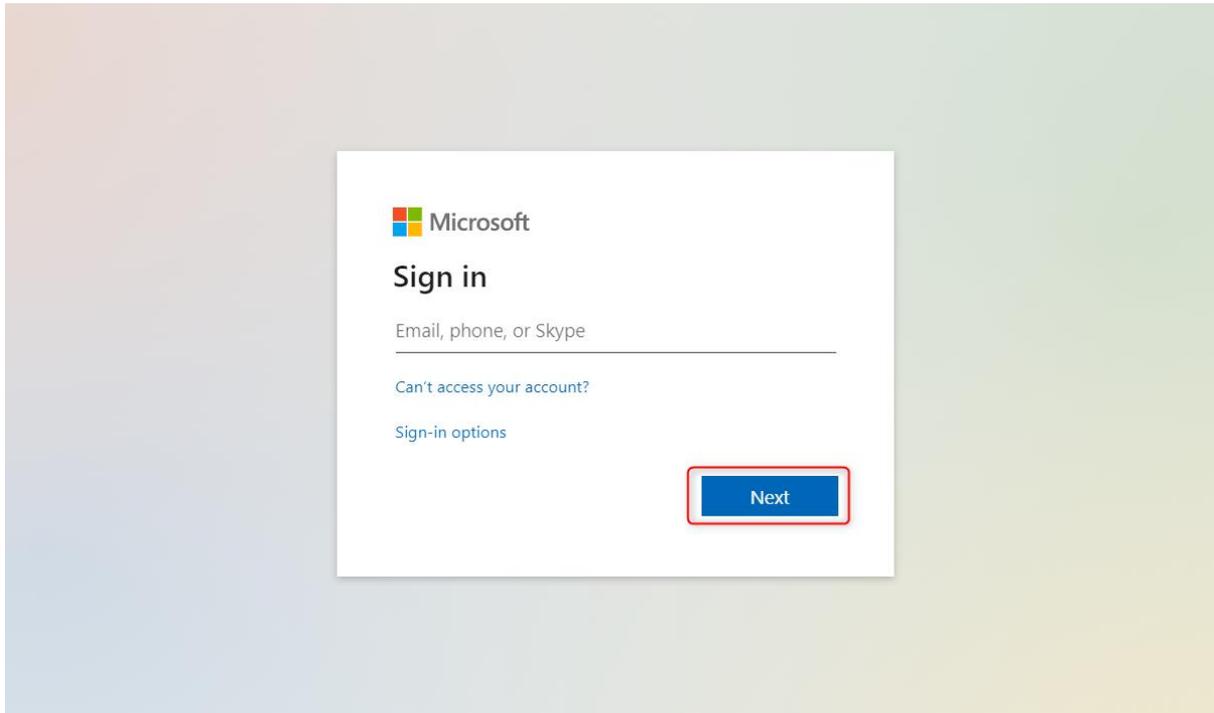
Step 1: Navigate to Management Portal site using the <https://filesync.hingepoint.com/>



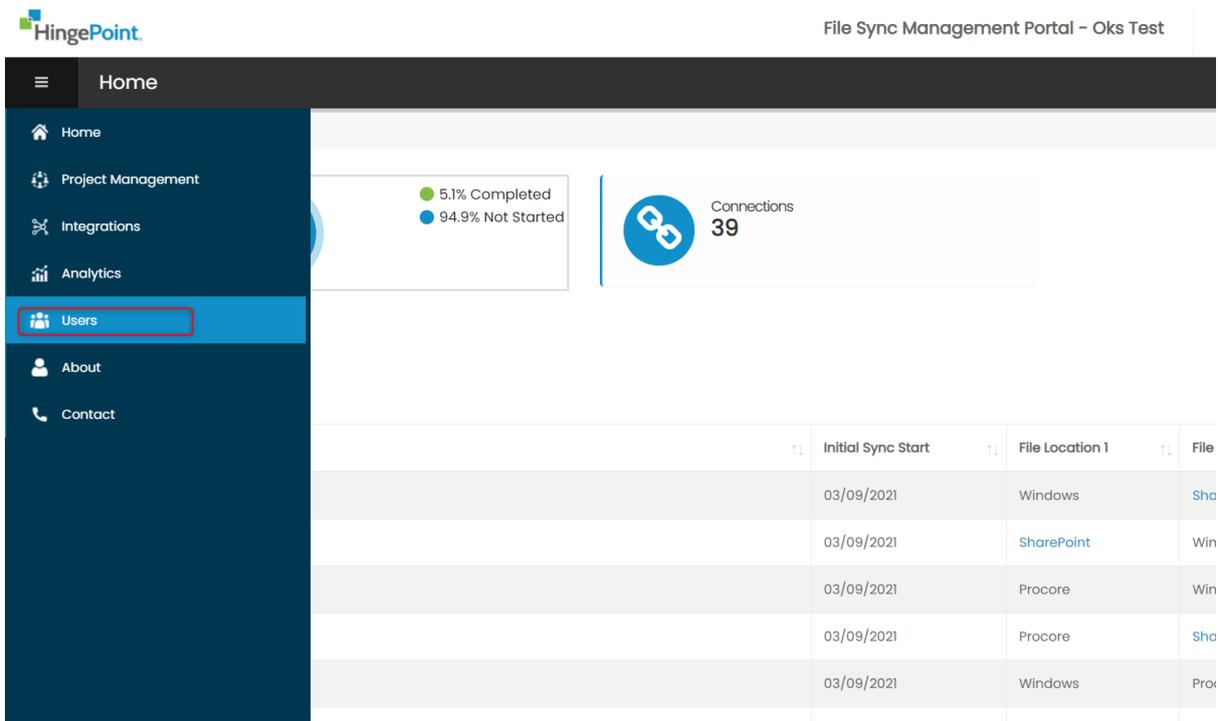
Step 2: Click on Use Microsoft button to login with your Microsoft account.



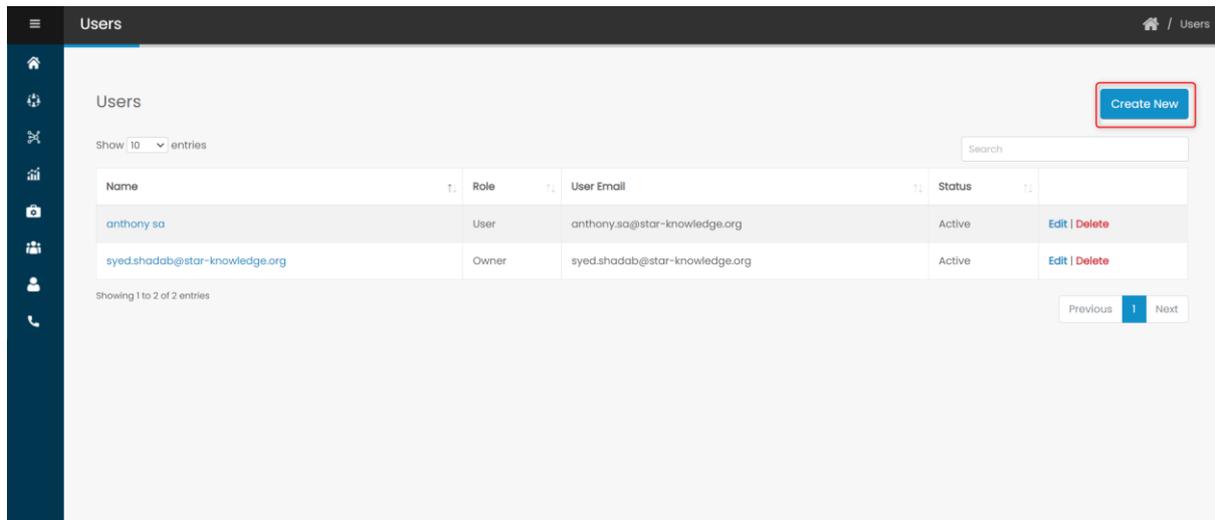
Step 3: Only Super Admin and Account Admin who has the access to the application can create Users. Enter your super admin or account admin credentials and click on next.



Step 4: Navigates to the homepage. Select "Users" from the left navigation menu.



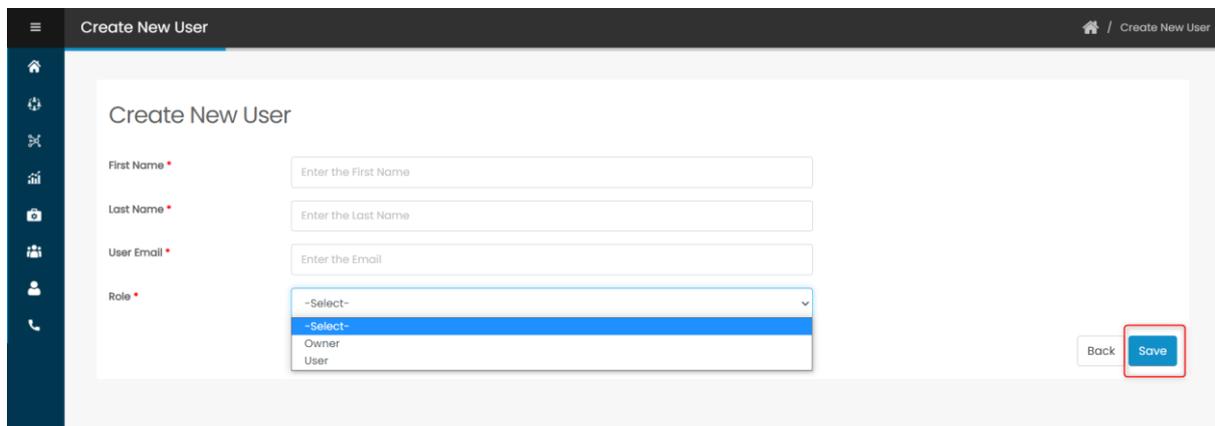
Step 5: Navigates to the User page. Click on create to create a user.



Step 6: Enter the required details and click on save

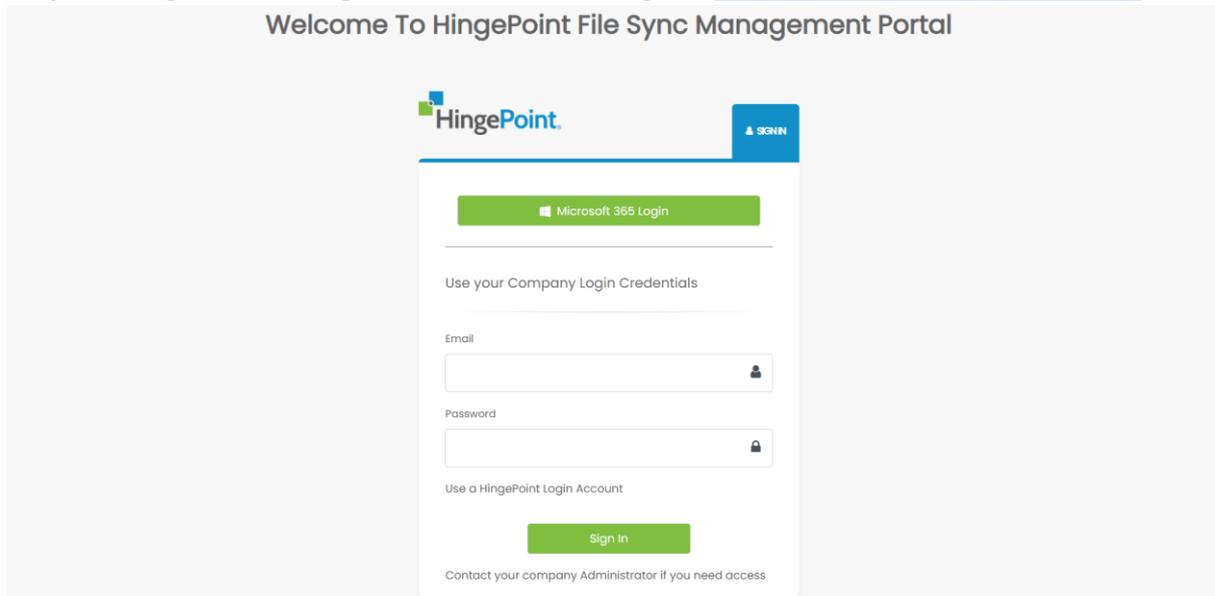
NOTE:

- 1** Selecting Role as admin will create user with Account Admin role.
- 2.** Selecting Role as User will create user with Account user role.

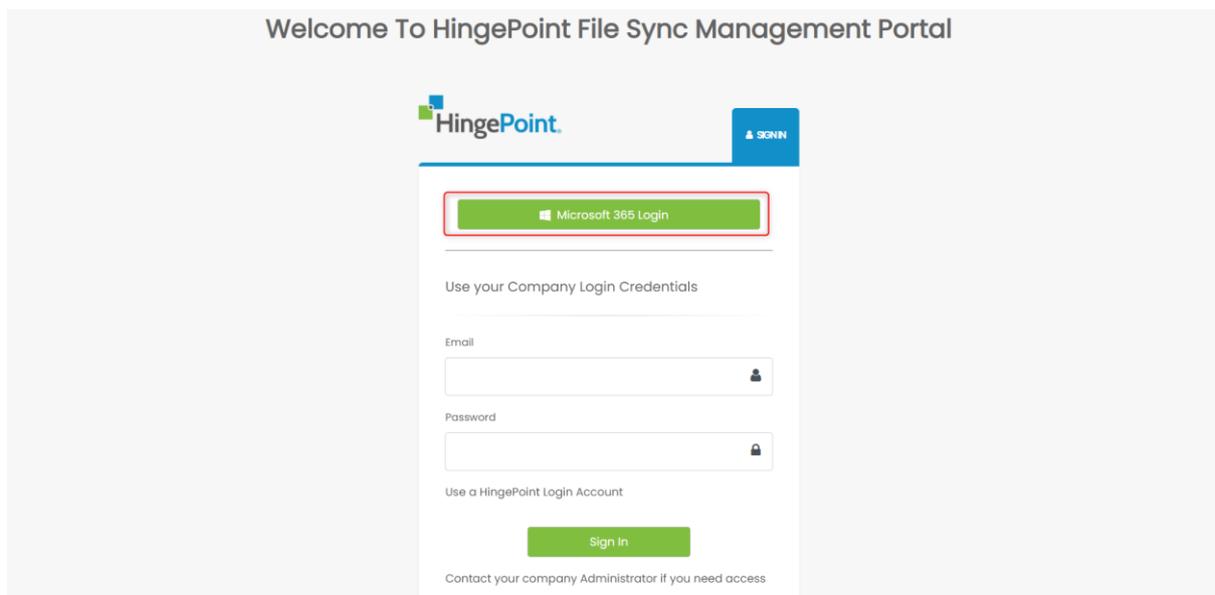


4.2 Edit a User:

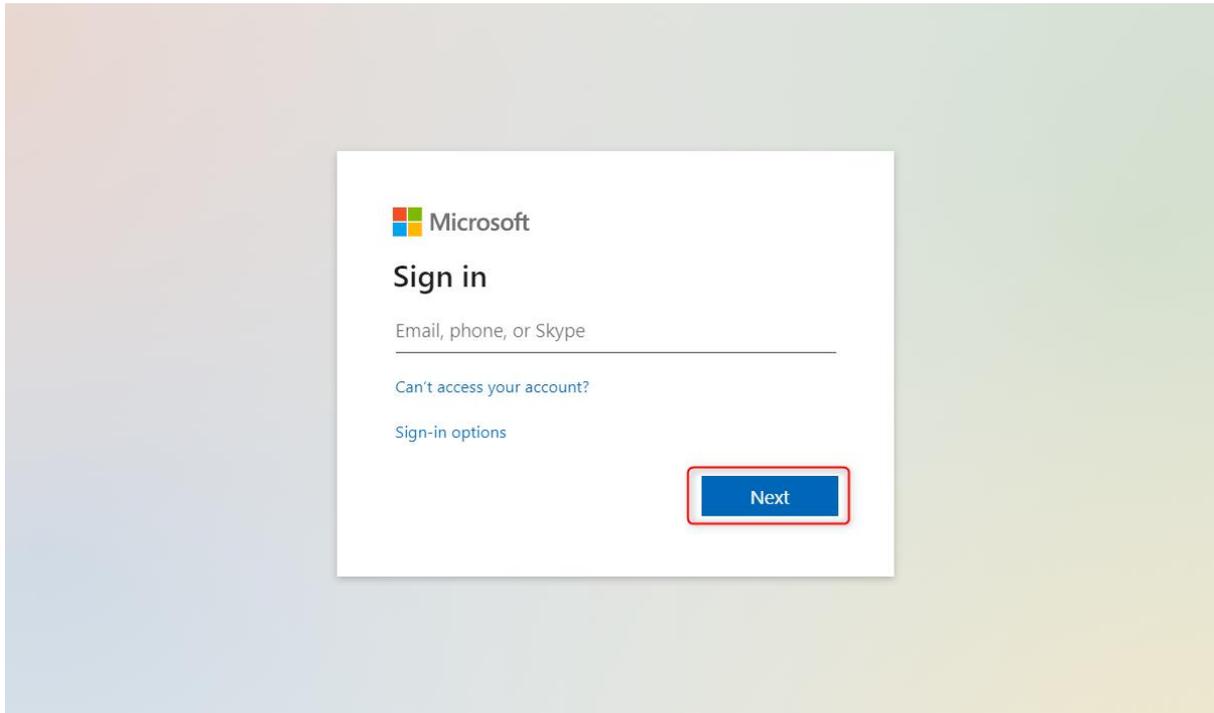
Step 1: Navigate to Management Portal site using the <https://filesync.hingepoint.com/>



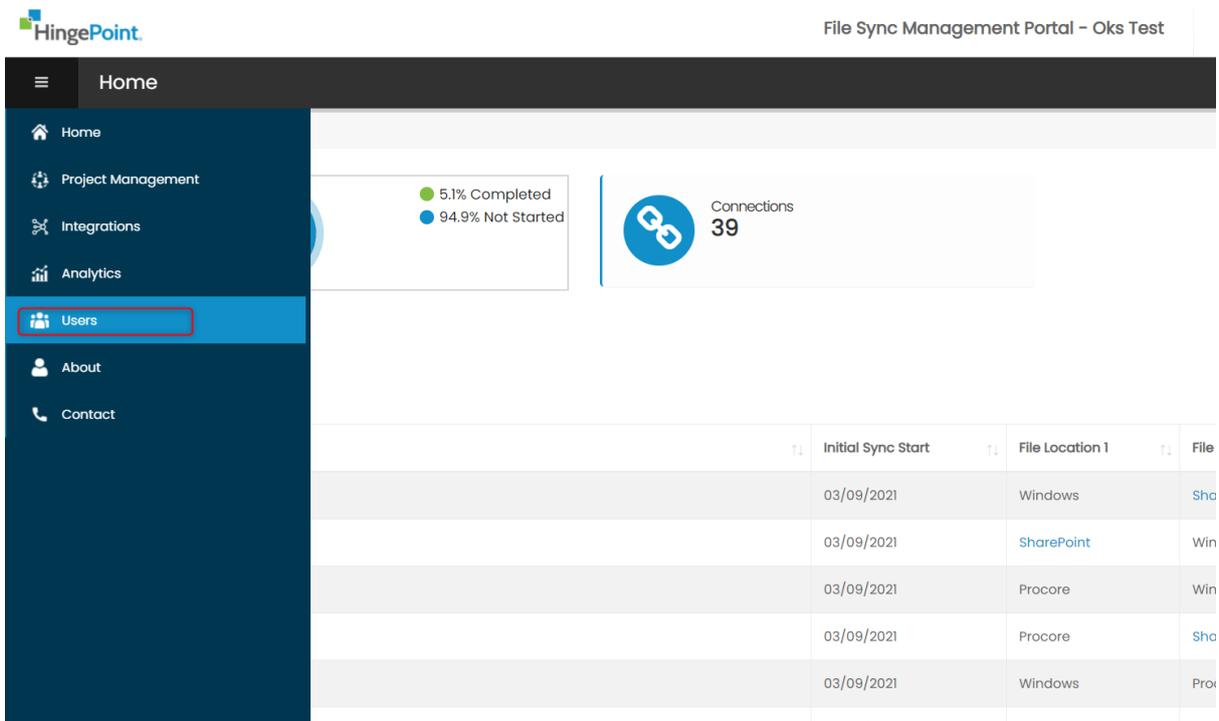
Step 2: Click on Use Microsoft button to login with your Microsoft account.



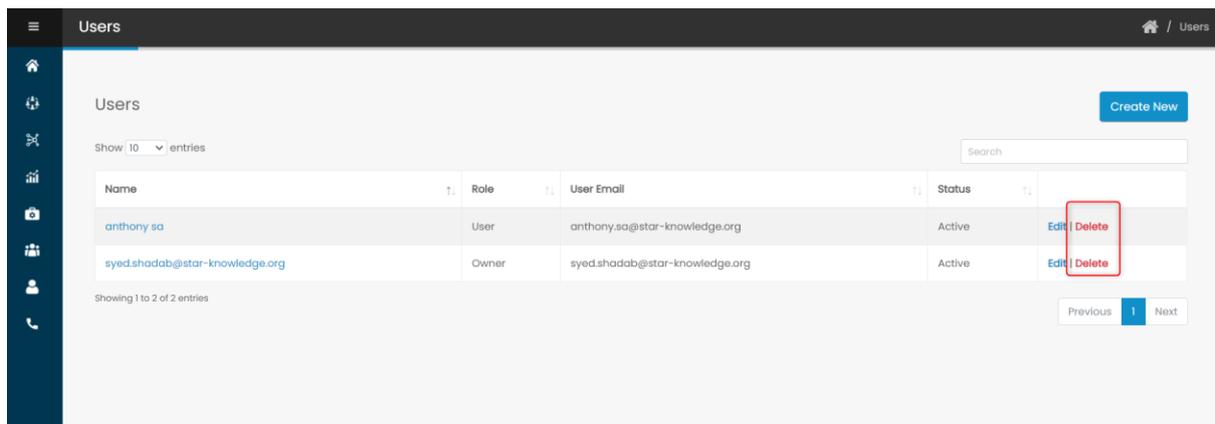
Step 3: Only Super Admin and Account Admin who has the access to the application can edit Accounts. Enter your super admin or account admin credentials and click on next.



Step 4: Navigates to the homepage. Select "Users" from the left navigation menu.



Step 5: Navigates to the User page. Click on edit button of the user you want to edit.

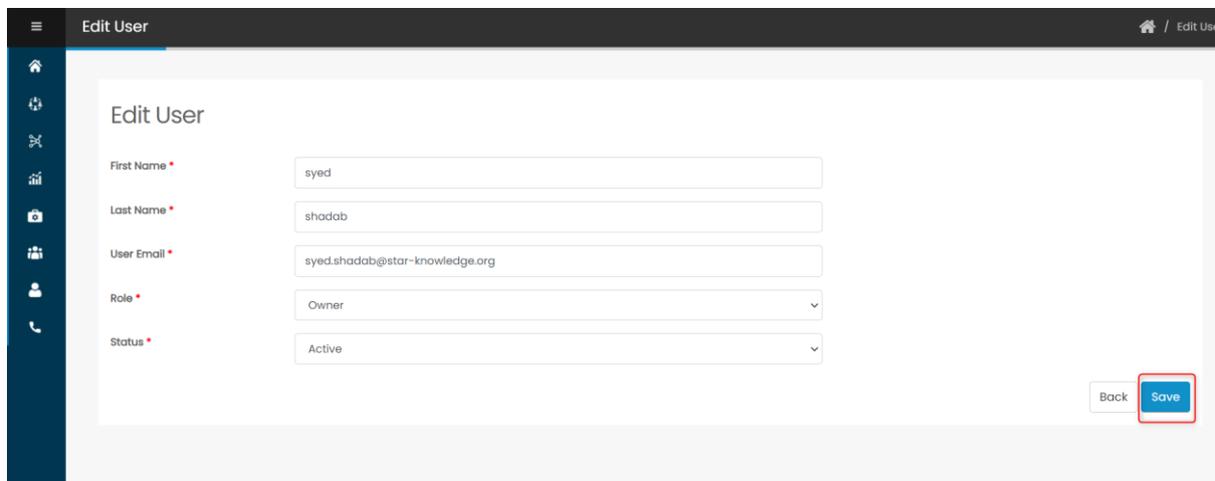


The screenshot shows the 'Users' management page. At the top right, there is a 'Create New' button. Below it, a search bar is present. A table lists two users:

Name	Role	User Email	Status	
anthony sa	User	anthony.sa@star-knowledge.org	Active	Edit Delete
syed.shadab@star-knowledge.org	Owner	syed.shadab@star-knowledge.org	Active	Edit Delete

At the bottom of the table, there are 'Previous', '1', and 'Next' navigation buttons. A red box highlights the 'Edit' and 'Delete' buttons for the second user.

Step 6: Update the fields and click on save.



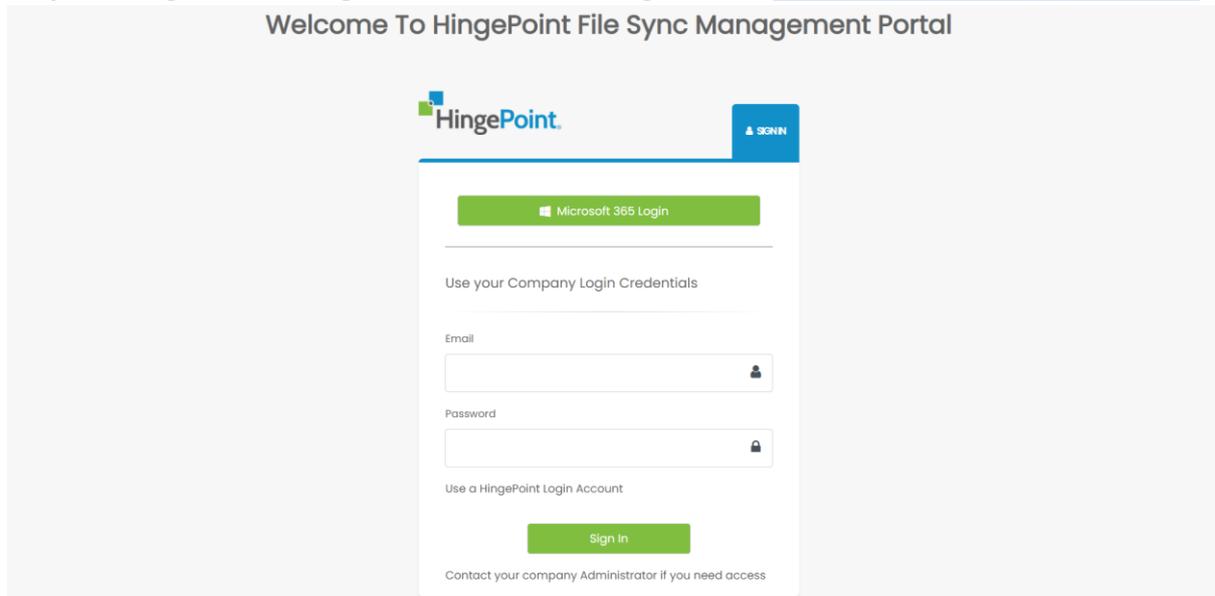
The screenshot shows the 'Edit User' form. The fields are filled with the following information:

- First Name: syed
- Last Name: shadab
- User Email: syed.shadab@star-knowledge.org
- Role: Owner
- Status: Active

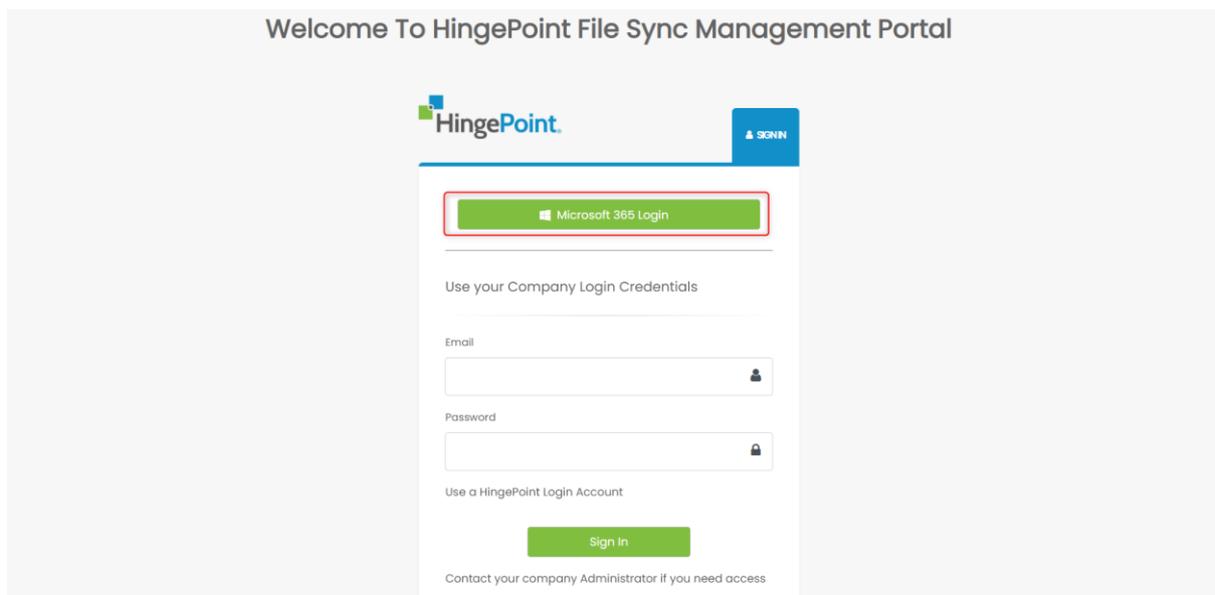
At the bottom right, there are 'Back' and 'Save' buttons. A red box highlights the 'Save' button.

4.3 View a User:

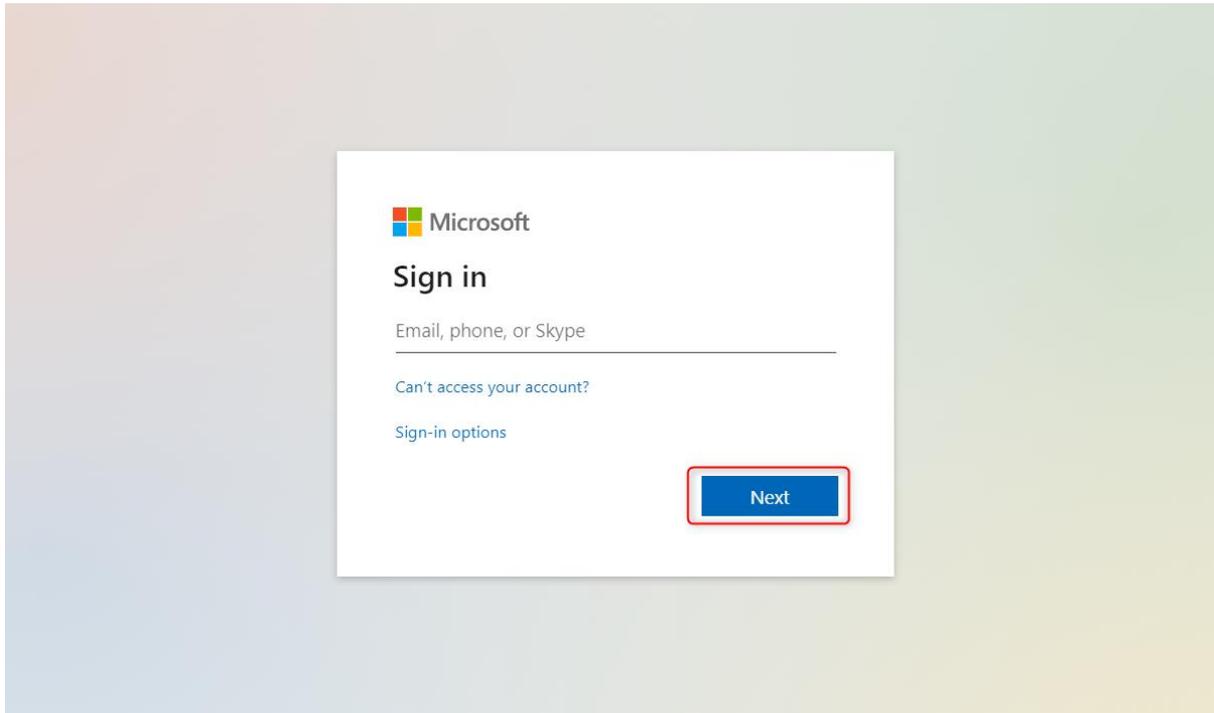
Step 1: Navigate to Management Portal site using the URL <https://filesync.hingepoint.com/>



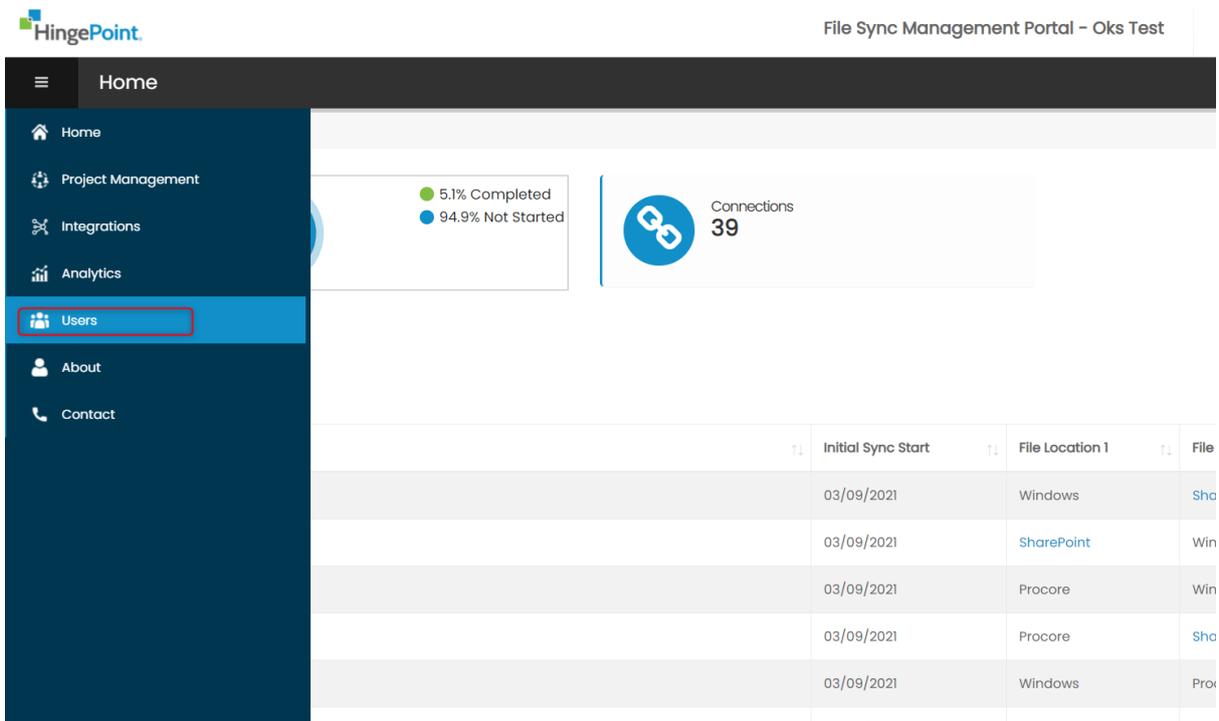
Step 2: Click on Use Microsoft button to login with your Microsoft account.



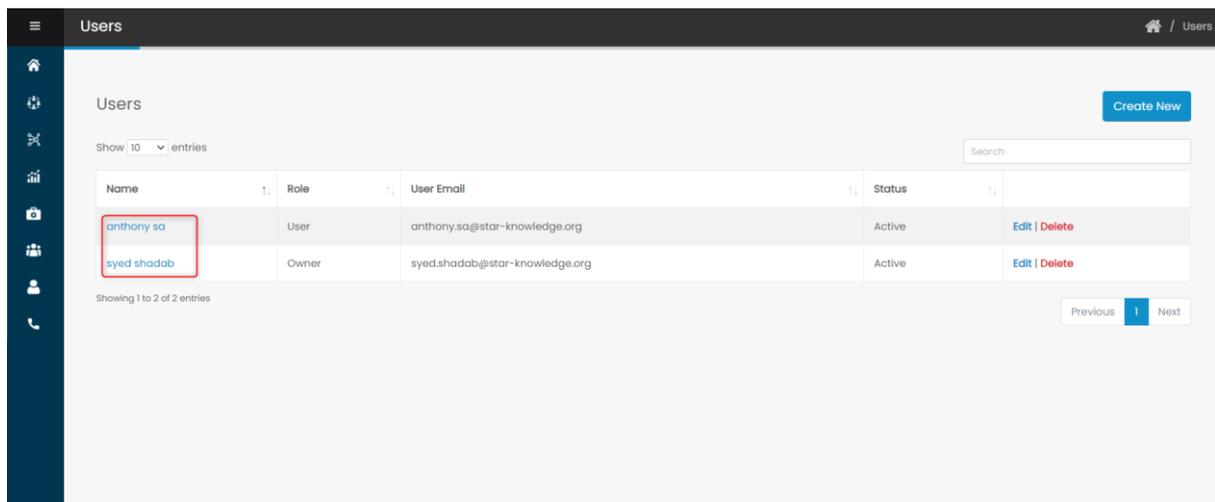
Step 3: Only Super Admin and Account Admin who has the access to the application can view Users. Enter your super admin or account admin credentials and click on next.



Step 4: Navigates to the Home Page. Select “Users” from the left navigation menu.



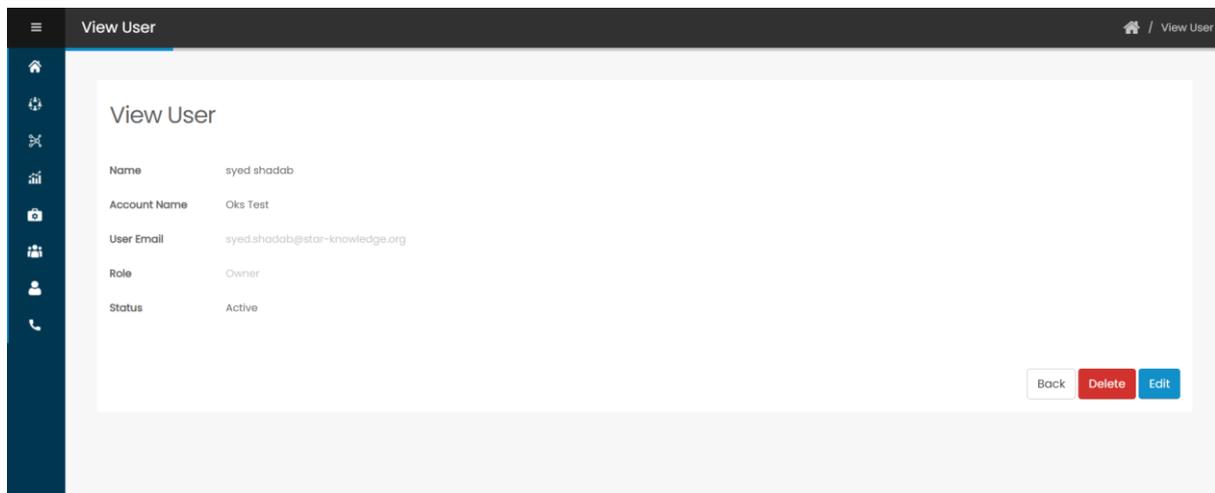
Step 5: Navigates to the User page. Click on name of the user you want to view.



The screenshot shows the 'Users' management page. At the top right, there is a 'Create New' button. Below it, a search bar is present. The main content is a table with columns: Name, Role, User Email, and Status. The table contains two entries: 'anthony sa' (User, anthony.sa@star-knowledge.org, Active) and 'syed shadab' (Owner, syed.shadab@star-knowledge.org, Active). The 'syed shadab' entry is highlighted with a red box. At the bottom of the table, there are 'Previous' and 'Next' navigation buttons.

Name	Role	User Email	Status
anthony sa	User	anthony.sa@star-knowledge.org	Active
syed shadab	Owner	syed.shadab@star-knowledge.org	Active

Step 6: The user is displayed.



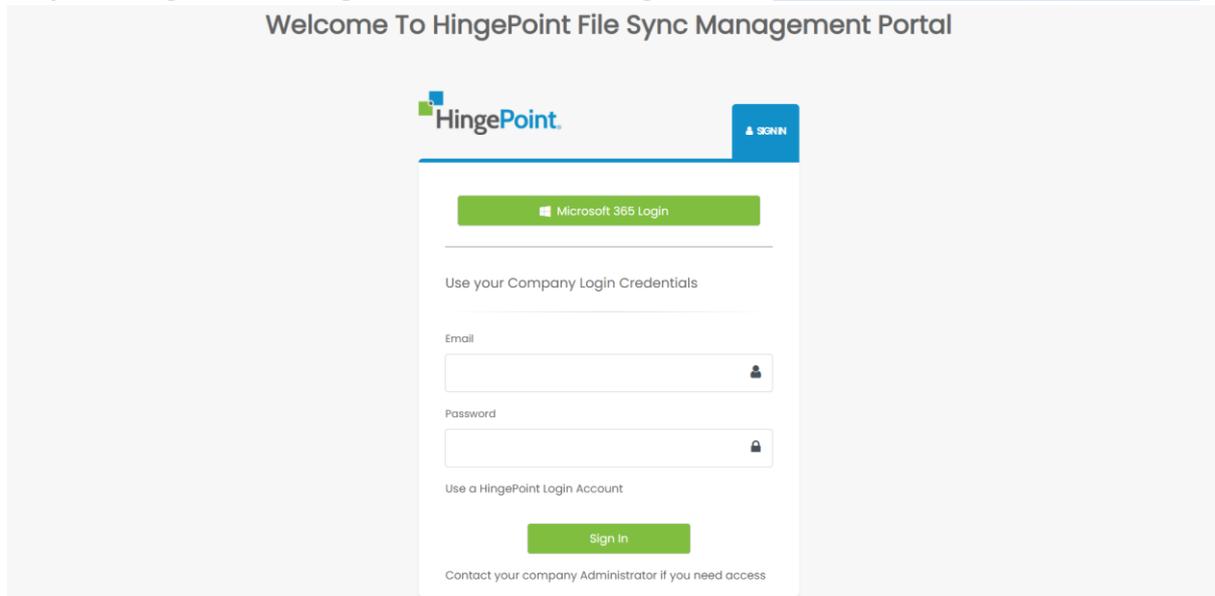
The screenshot shows the 'View User' page for the user 'syed shadab'. The page displays the following details:

- Name: syed shadab
- Account Name: Oks Test
- User Email: syed.shadab@star-knowledge.org
- Role: Owner
- Status: Active

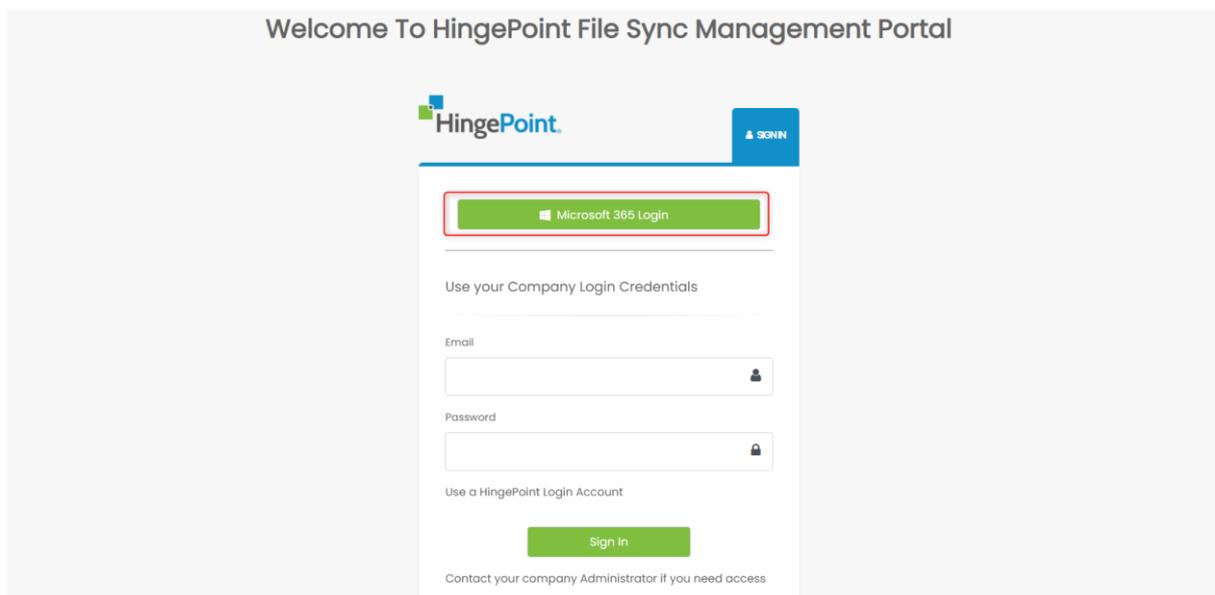
At the bottom right, there are three buttons: 'Back', 'Delete', and 'Edit'.

4.4 Delete a User:

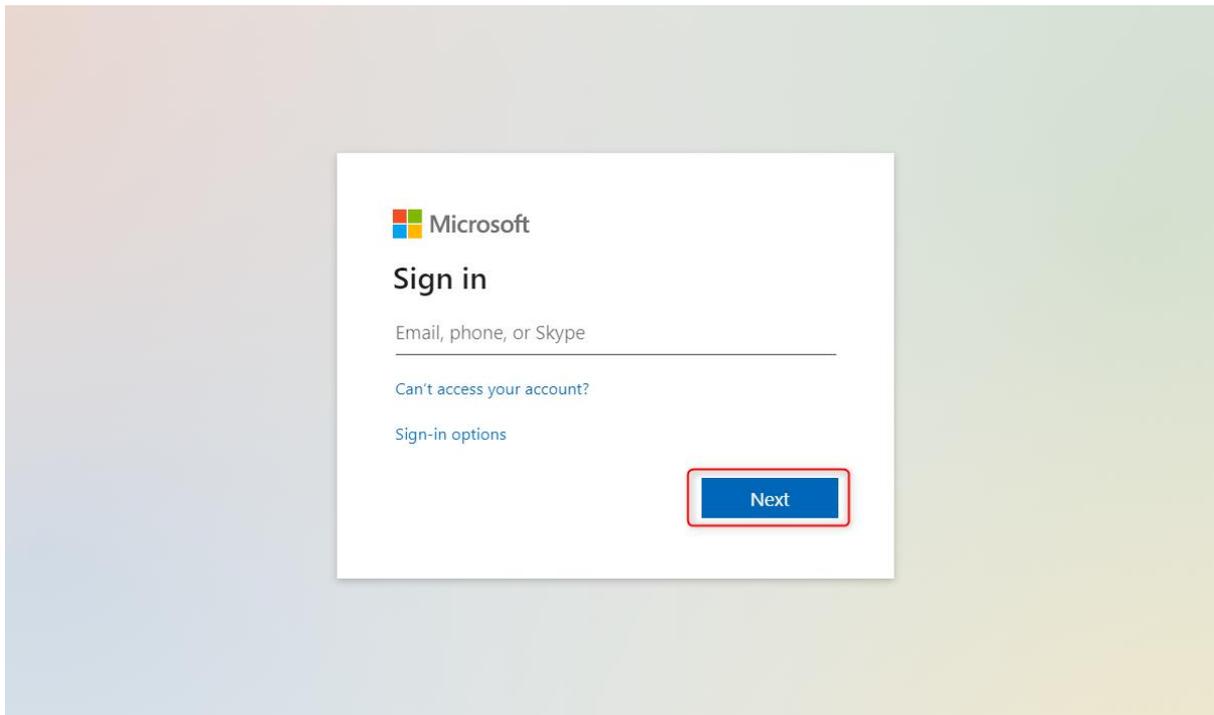
Step 1: Navigate to Management Portal site using the URL <https://filesync.hingepoint.com/>



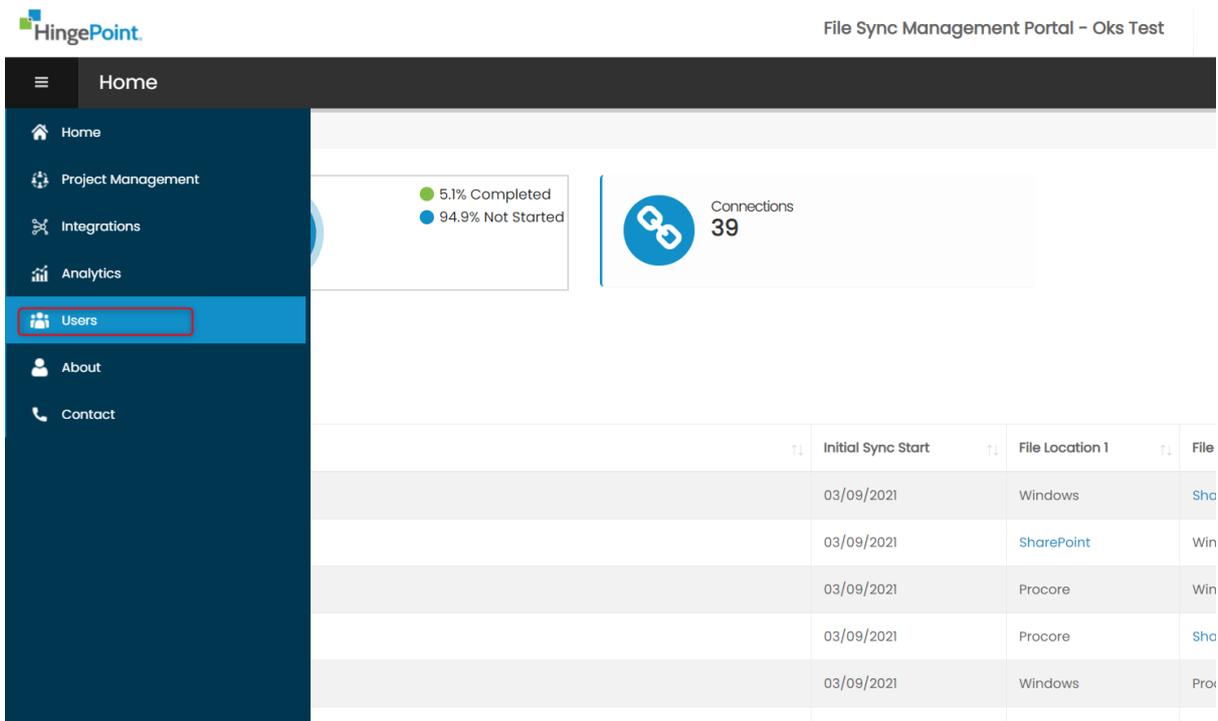
Step 2: Click on Use Microsoft button to login with your Microsoft account.



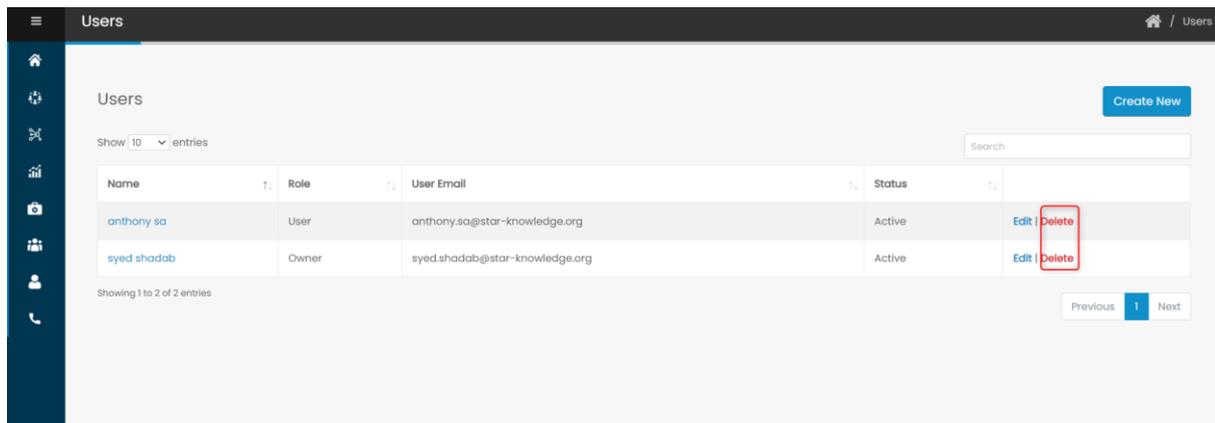
Step 3: Only Super Admin and Account Admin who has the access to the application can delete users. Enter your super admin or account admin credentials and click on next.



Step 4: Navigates to the home page. Select "User" from the left navigation menu.



Step 5: Navigates to the User page. Click on delete button of the account you want to delete.



Step 6: Click yes to delete the user.

