

Establish Connectivity to Microsoft SharePoint and OneDrive

This article details how to establish connectivity to MS SharePoint and OneDrive by using SharePoint Plugin. Prerequisites for establishing connectivity to SharePoint are listed below.

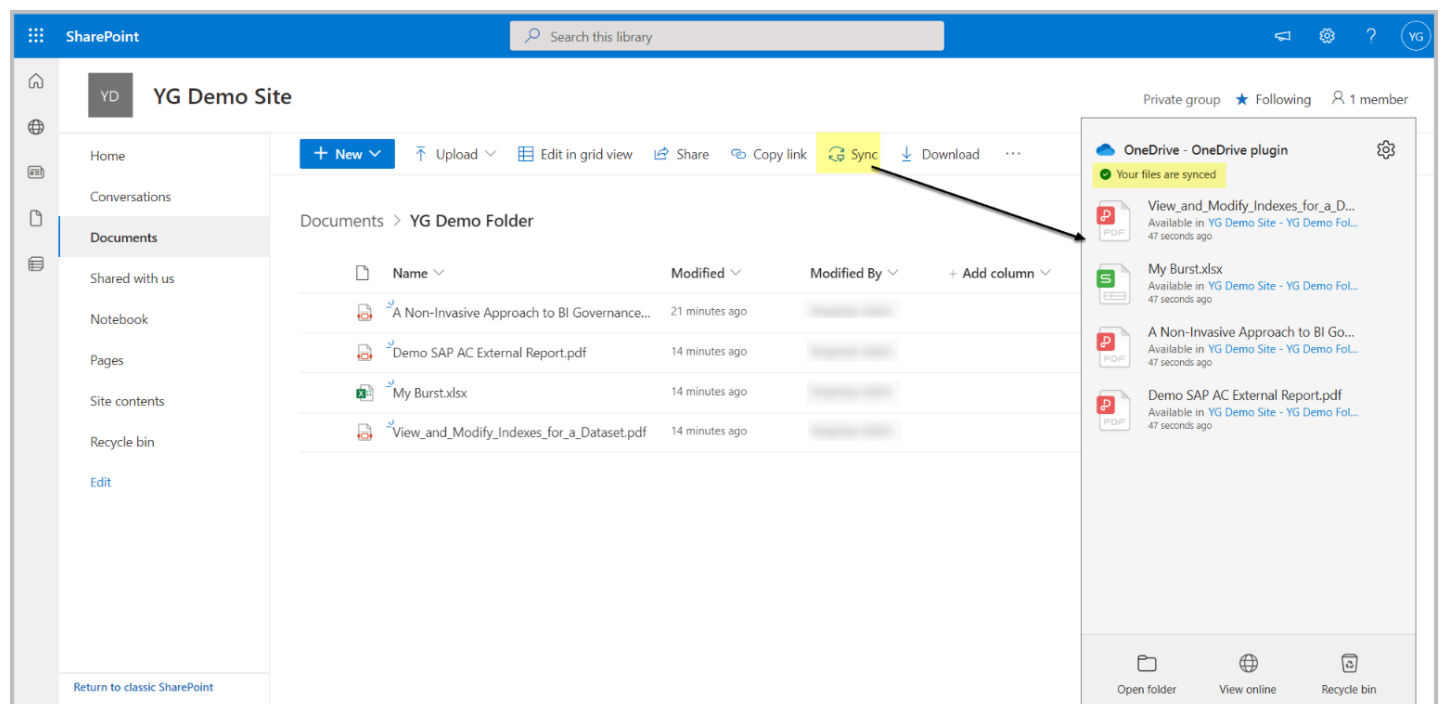
In order to connect to OneDrive, both SharePoint and OneDrive prerequisites must be fulfilled.

SHAREPOINT PREREQUISITES:

- Find more details in [Prerequisites for Connecting to Microsoft SharePoint](#)

ONEDRIVE PREREQUISITES:

- [Prerequisites for Connecting to Microsoft SharePoint](#)
- SharePoint and OneDrive licensed under one account
- Installed [OneDrive Application](#)
- [SharePoint synced with OneDrive](#) (see the screen below)



Locate Client ID and Tenant

Access Azure Portal's **Home** > **App registrations** > **Your Application** > **Overview** Tab

The screenshot shows the Microsoft Azure portal interface. The left sidebar contains navigation links for Overview, Quickstart, Integration assistant, and various management options like Branding, Authentication, and Certificates & secrets. The main content area is titled 'Application' and shows the 'Essentials' section. In this section, the 'Application (client) ID' and 'Directory (tenant) ID' are displayed, with a red circle and the number 1 highlighting these fields. Other details like 'Supported account types', 'Redirect URIs', and 'Application ID URI' are also visible. Below the Essentials section, there are links for 'Call APIs' and 'Documentation'.

1. Find **Client ID** and **Tenant** to be used for MI Data Source creation as shown on the screen above

Generate Client Secret

The screenshot shows the 'Certificates & secrets' page in the Microsoft Azure portal. The left sidebar is the same as the previous screenshot. The main content area shows the 'Certificates & secrets' section. There is a message about copying the new client secret value. Below this, there is a table for 'Client secrets'. A red circle with the number 1 highlights the 'New client secret' button. Another red circle with the number 2 highlights the 'Value' field of the newly created client secret, which is 'e16bf6b0-ba95-490a-8b9c-e253d5830cf4'.

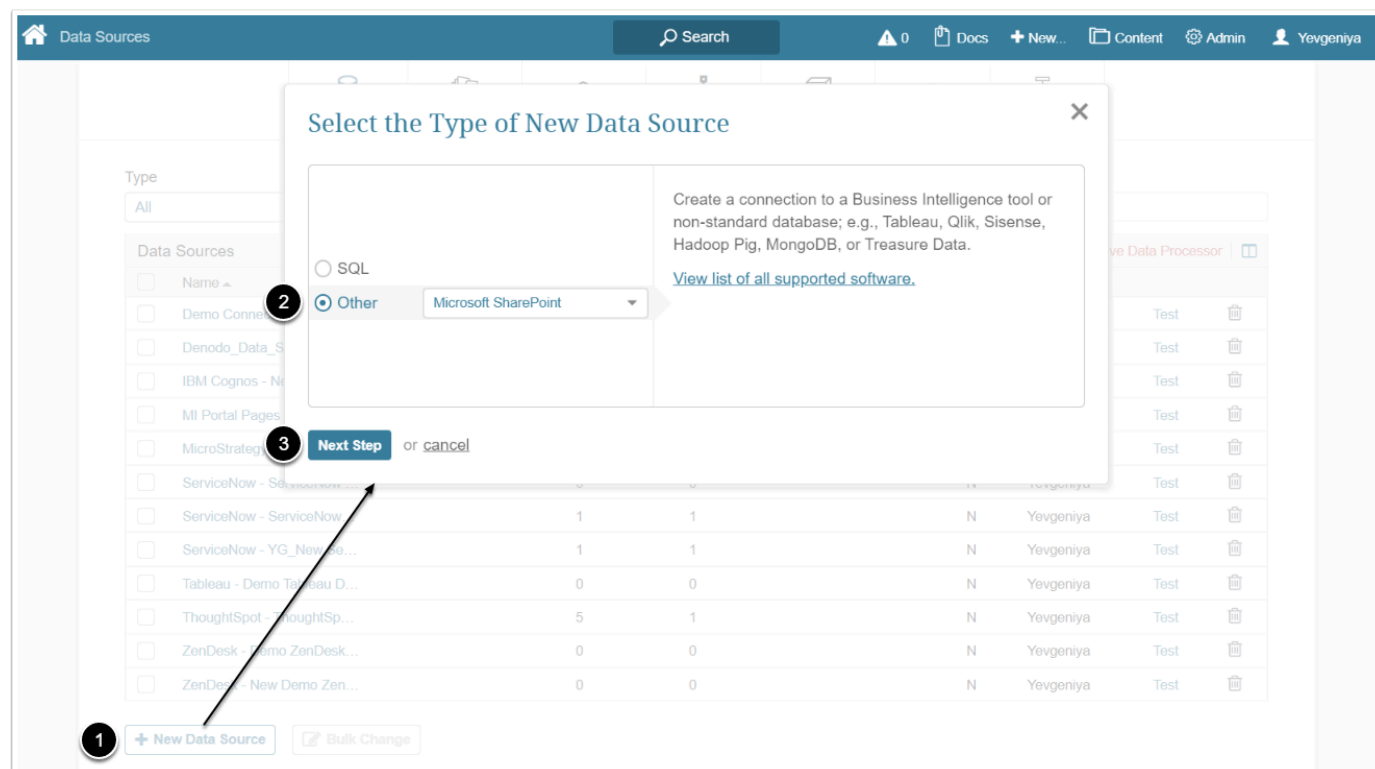
Description	Expires	Value	ID
App Secret-SP	3/30/2022	~70ixZV.0a3h992dSdF9	e16bf6b0-ba95-490a-8b9c-e253d5830cf4

On **Certificates & secrets** tab:

1. **[+New client secret]**
 - In the pop-up, specify details as needed and **[Add]**
2. Copy the Client secret **Value**
 - **NOTE:** the Value won't be available after you perform another operation or leave the tab

1. Create New Data Source

Access **Admin > Collection & Storage > Data Sources**



1. **[+New Data Source]**
2. Choose "Microsoft SharePoint" from **Other** drop-down list
3. **[Next Step]**

2. Specify Required Parameters

Plugin **Microsoft SharePoint**

1 Data Source Name

Tags

Start typing to find or create Tags, then press the Enter key to save.

2 Auth Type

3 Client id

Public identifier for app

4 Client Secret

Client secret that is known only to application and authorization server

5 Tenant

It represents organization

☐ Enable Content Auto Synchronization

☐ Enable Custom Field Data Synchronization

1. Input a descriptive phrase in **Data Source Name**
2. Select the required **Auth Type**
 - **Client credential**: specify parameters as shown on the screen
 - **OAuth**: use **Client id** and **Token**
 - **Password**: input **Client id** and MS SharePoint account credentials
 - **Identity Profile**: select the required [Identity Profile](#)
 - **NOTE**: Find the instructions on locating the required parameter values in MS SharePoint [above](#)
3. Input MS SharePoint **Client id**
4. Provide MS SharePoint **Client Secret**
5. Enter MS SharePoint **Tenant**

Optionally, toggle on:

- [Enable Content Auto Synchronization](#)
- [Enable Custom Field Data Synchronization](#)

3. Configure Optional MS SharePoint Parameters

You can configure additional parameters for more precise object collection.

▼ Optional Microsoft SharePoint Parameters

Plugin Connection Profile Parameters				
	Variable	Value	Description	
1	Document library filter		Filter by document library	⚙
2	Exclude metadata columns	Modified, LinkFilename, ContentType...	To exclude some columns.	⚙
3	Folder filter		Filter by Folder. Use as a separator!	⚙
4	Include columns	true	To get columns. Can be either false or true.	⚙
5	Include lists	true	Include lists to build datasets	⚙
6	Include Excel sheets		Include Sheet-level metadata for Excel files	⚙
7	Site filter	VLSite	Filter by site	⚙

	Name	Description
1	Document library filter	Specify one or multiple Document libraries to filter objects. If left blank, Plugin will collect objects from all libraries. <ul style="list-style-type: none"> NOTE: [Refresh Metadata] to get the list of available MS Document libraries.
2	Exclude metadata columns	Specify MS SharePoint columns that are not relevant for data collection. All available default columns are included in the list.
3	Folder filter	Specify the existing MS SharePoint Folder name to filter and collect objects by folder. To specify multiple Folders, use the pipe " " as a delimiter.
4	Include columns	Set "true" to include custom columns. This is required to proceed with Custom Field Data Synchronization .
5	Include lists	Set "true" to include List objects to be able to create Datasets from them.
6	Include Excel sheets	Set "true" to include both Excel files and their sheets as individual objects upon collection. <ul style="list-style-type: none"> NOTE: External Content won't be created for individual sheets upon Content Autosync, it is only available for Excel files.
7	Site filter	Specify the existing MS SharePoint Site name to filter and collect objects by site. <ul style="list-style-type: none"> NOTE: [Refresh Metadata] to get the list of available MS SharePoint Sites.

i IMPORTANT: Document library and Site Filters won't work if Values for them are set manually.

Clicking **[Refresh Metadata]** collects available Filter Values that are accessible for the Client ID specified in the profile.

Steps to work with Document library/Site Filter:

1. **[Refresh Metadata]** and wait until the Metadata refreshed successfully popup is displayed
2. Click the gear icon for the Filter
3. Choose the Value from the drop-down (click the field to display it)
4. **[Save]**
5. **[Refresh List]** on the *Microsoft SharePoint Objects* Tab to verify your selection

NOTE:

1. If Filters are not specified, Metric Insights will collect all objects from all Sites.
2. If you use Site + Folder Filters, make sure the Folder exists in the specified Site. In case of inconsistencies, Metric Insights will not return any objects.

4. Proceed with Advanced Configuration

Advanced Configuration settings can be set to default values unless Data Source requires more precise tuning. For more details on how to proceed, refer to [Advanced Data Source Configuration](#).

[Test Connection] in the upper right corner