

# SharePoint Integration

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Your Userlane solution can be integrated with SharePoint providing a simple way for your users to search SharePoint content without context switching.

This article covers

- how it works
- what can be searched
- how to set it up
- Best Practices

## How it works

When you search using the Assistant, it looks for information in both Userlane (like guides and announcements) and SharePoint. If your search includes results from SharePoint, you'll see a document icon.



Clicking on a SharePoint result will show you an improved view of the content. If the page is long and needs scrolling, you can open the original page in SharePoint by clicking the link below the document title.

**i** Please note that this requires logging in to SharePoint, which means that users without such a login won't be able to open pages directly in SharePoint, and can only view the content from the Userlane assistant.

## What can be searched

Due to the Microsoft Graph API limitations, we cannot search and retrieve all SharePoint content types.

We do search:

- SharePoint pages, but only the web text parts in page names, titles, and page content
- lists and list items

We cannot search:

- embedded web content, such as images and documents
- wiki pages

**i** We are NOT indexing SharePoint content in our own database. Instead, we rely on the Microsoft Graph

API to get the results in real time. Therefore, it is **not** possible to compare search results from SharePoint's native search with the results that Userlane shows in the assistant.

**i** When Userlane retrieves SharePoint content via the SharePoint integration, it **does not enforce or replicate individual end-user permissions** from SharePoint. Instead, the integration uses the permissions granted to the configured **Azure AD application** (via Microsoft Graph API application permissions) to fetch results.

## Set-Up

### Prerequisites

- Use the Microsoft Graph API and not SharePoint's own native API which is the way that is recommended by Microsoft as its no longer developed further because Microsoft strategically decided to replace it with Microsoft Graph API
- Be an Azure AD admin
- Userlane Admin or Moderator role permissions

☐ Limitation of the Graph API: Our integration only works for SharePoint online, not on-premise!

### Enable Integration

#### 1. Register Userlane as an application in the Microsoft Azure Active Directory (This can only be done by an Azure AD admin)

As a prerequisite for us to connect to SharePoint, Userlane has to be registered as an application in your organization's Azure AD tenant that is linked to SharePoint. It needs to have application permissions (not delegated ones).

☐ For the integration to work as intended, the Userlane application needs at least the `Sites.Read.All` permission for `Microsoft.Graph`, which has to be assigned under API permissions in the application registration portal. In addition, this will require consent from an Azure AD administrator in the Azure portal, which has to be repeated any time the permissions for the app are changed.

After registering Userlane in Azure AD, you'll need the following details to set up the integration:

1. Azure Active Directory Tenant ID: This is the ID of the tenant where Userlane is registered as an application.
2. Application/Client ID: It's the unique ID assigned to Userlane as a registered app, used for authentication with the Microsoft Graph API.
3. Application/Client secret: This secret is linked to the above ID and allows Userlane to authenticate with the Microsoft Graph API. You can generate it in the Certificates and secrets menu of the application registration portal. Remember to copy its value (not ID) as it's only shown once during generation.

For step-by-step instructions on how to register an app in Azure AD, please use [this Microsoft support article](#).

## 2. Enter the required fields in the Userlane Portal

To connect Userlane with SharePoint, follow these steps:

1. Log in to the Portal and navigate to

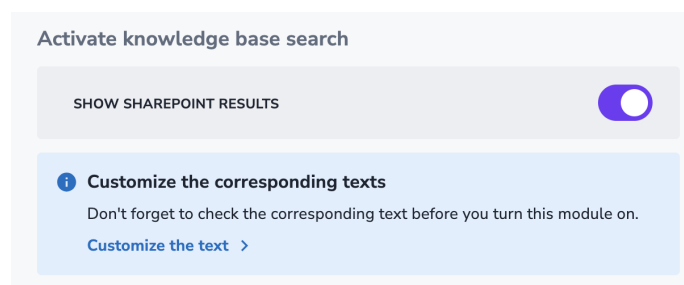
**Account > Global settings > Integrations**

2. Choose the SharePoint integration from the "Available integrations" section.
3. Fill in the following details in the form that appears:
  - Integration name: This is how the integration will appear in the search settings.
  - SharePoint Subsite URL: Enter the URL of the specific subsite in SharePoint that the integration will search.
  - Azure Active Directory Tenant ID, Application/Client ID, and Application/Client secret value: These details were obtained in the previous step.
4. Once you've entered the information, save and connect.

**i** After setting up the connection, it will be tested. If any information is incorrect, you'll see an error notification below the fields. If everything is correct, the integration will appear in the "Connected integrations" section of the Integrations page.

## 3. Activate the integration for your property's search

In the Userlane Portal, go to **Customize > Search** and make sure that the search is activated for the property. **Additionally, ensure that the integration has been activated.** Scroll down to "Connect search with (SharePoint integration name)" and enable the toggle. This will activate the integration for the end user, and include the relevant SharePoint subsites in all searches done in the assistant.



## 4. Test the integration

Go to the application the property is set up for, and test the search in the assistant to check that the integration has been set up correctly and that you can see SharePoint search results.

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## Best Practice

- Restrict the integration to specific site collections or sub-URLs that contain the content you want shared.

