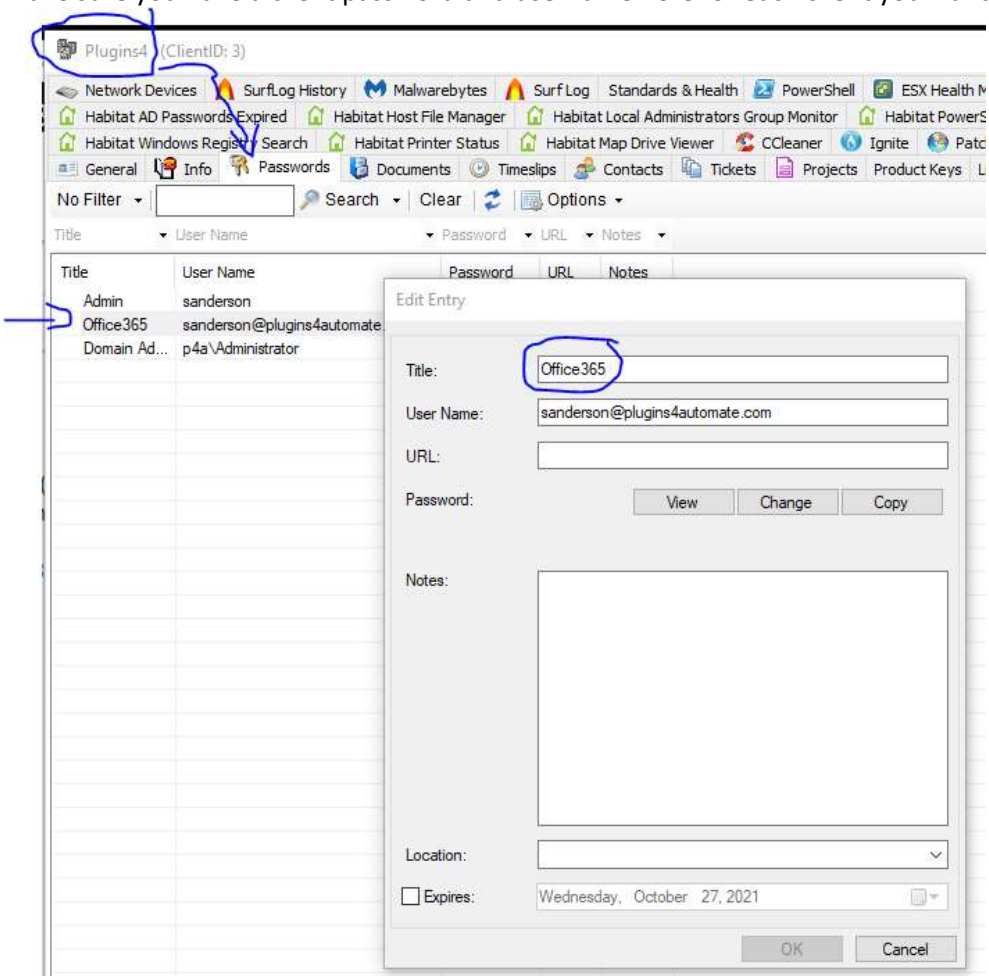
How to configure Office365 For Automate

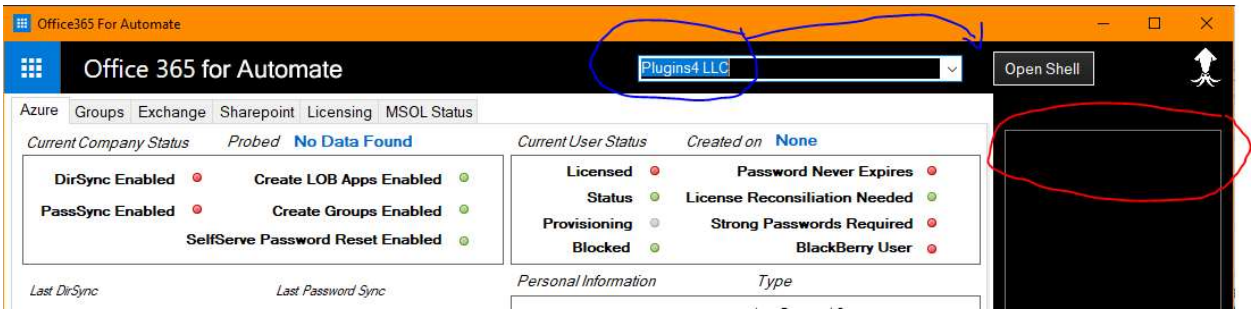
Here is the walk through on setting up a client to manage Office365.
Make sure you're on version 3.0.0.10
Here -> https://delivery.shopifyapps.com/-/a4b6a6ca46620f33/2b5489044250b92a

How-to -> Setup Office 365 in ConnectWise Automate

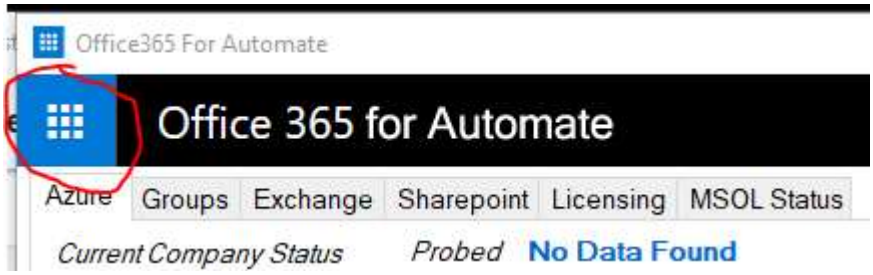
Make sure you have a client password and username here for each client you want to run Office365 for.



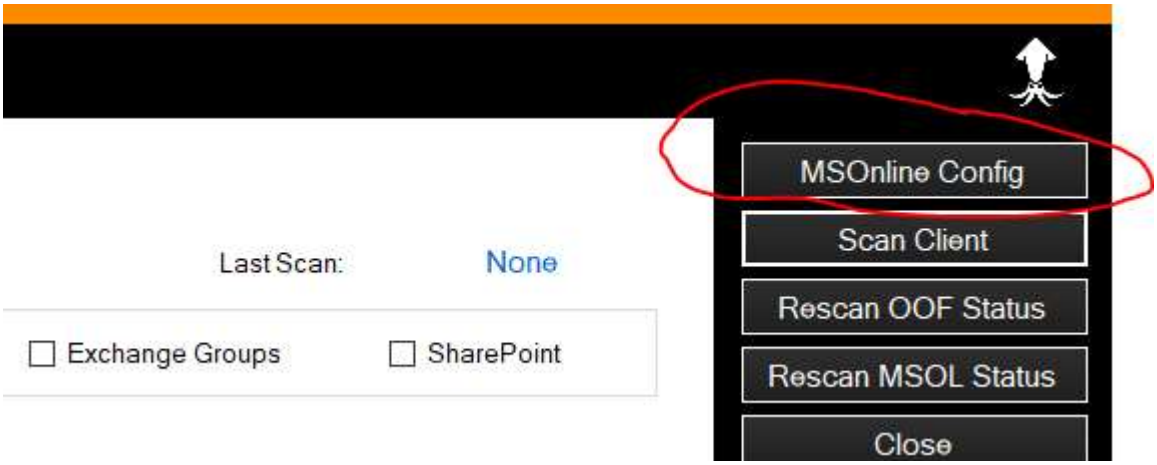
Now launch Office365 plugin and you should see this for client, The PowerShell console should now work but no user data available.



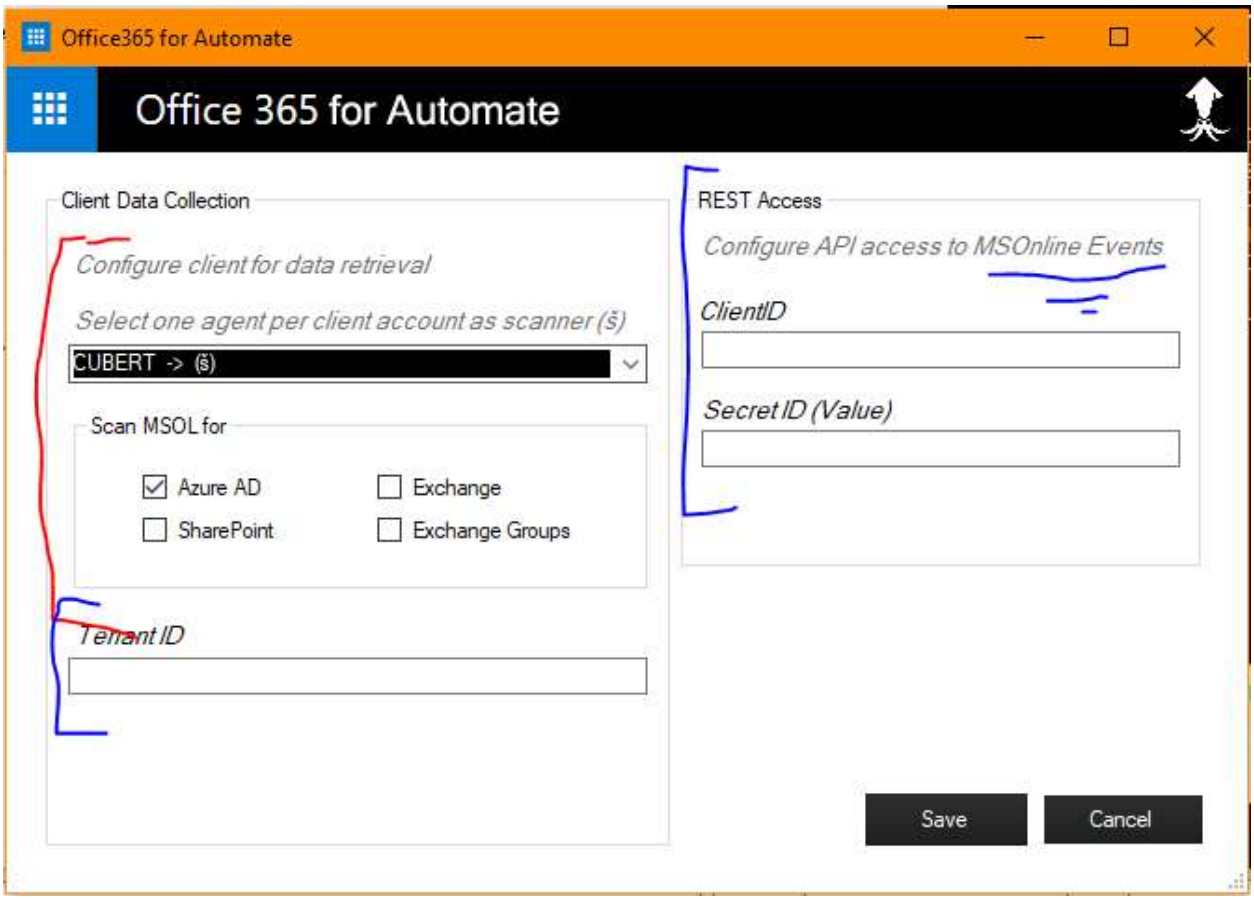
Click the blue button at top for configure



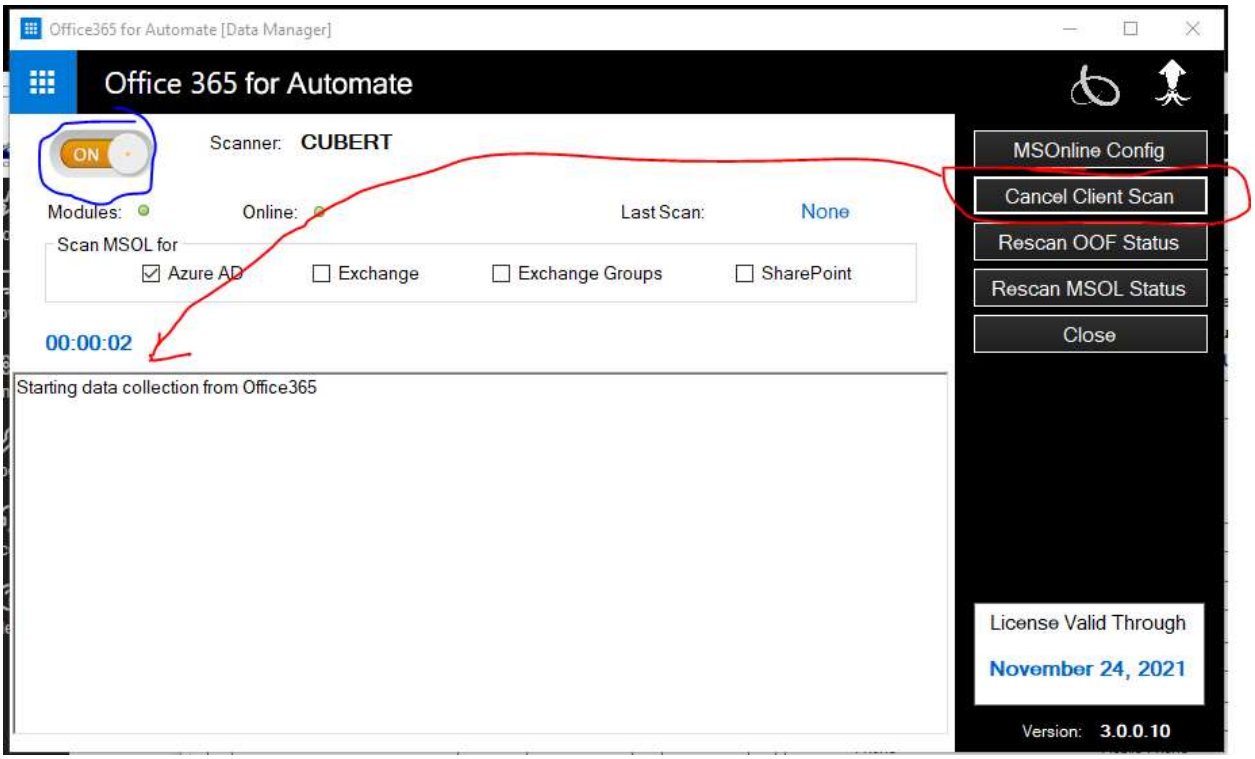
In new Config window select to MS Online Configure button



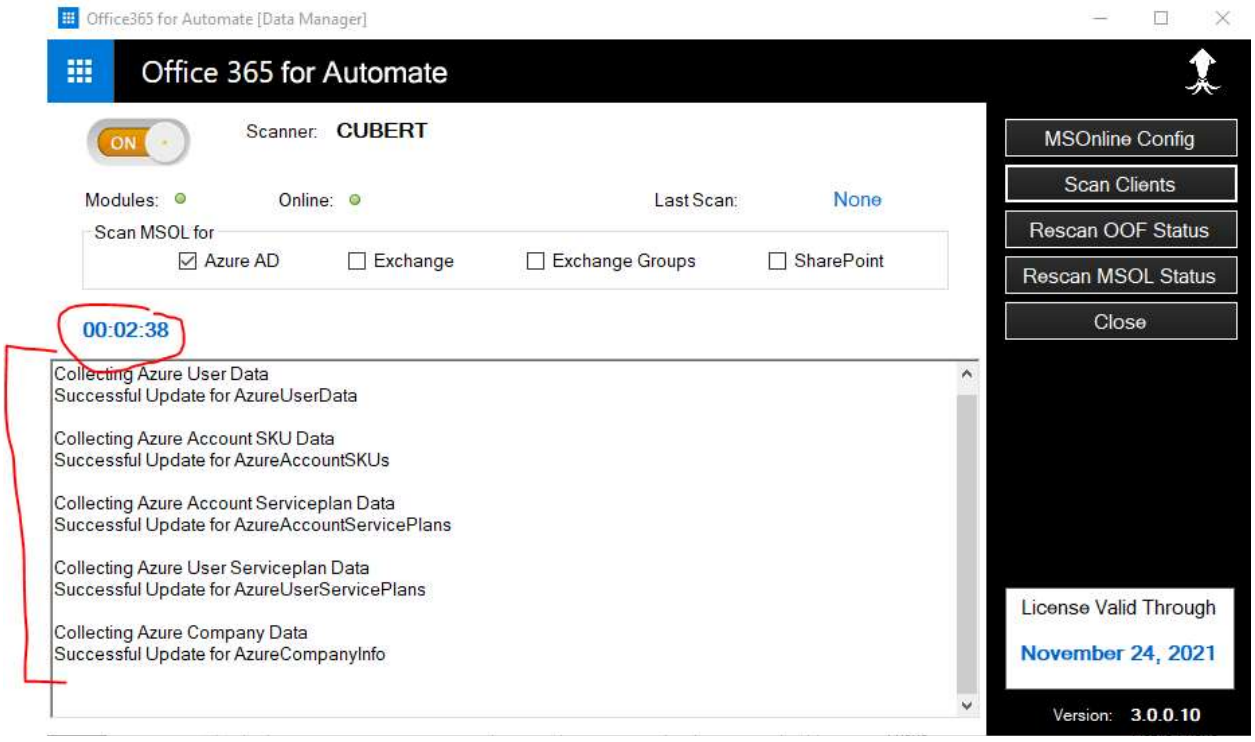
Configure 1 agent to do the heavy lifting, (Data Sync collection) 1 process that takes about 3-15 minutes to complete each night at 12 AM. Items in red are required where Items in blue are optional. If you do not supply them the plugin will still do its job just missing some data. Event from Microsoft are the first data you will notice missing if not setup correctly.



Now you will need to activate the agent for daily scans with master switch then seed the database with the services you subscribe to Azure, Exchange and SharePoint. If you do not use some of these services, the scans will go faster if you disable those scans.

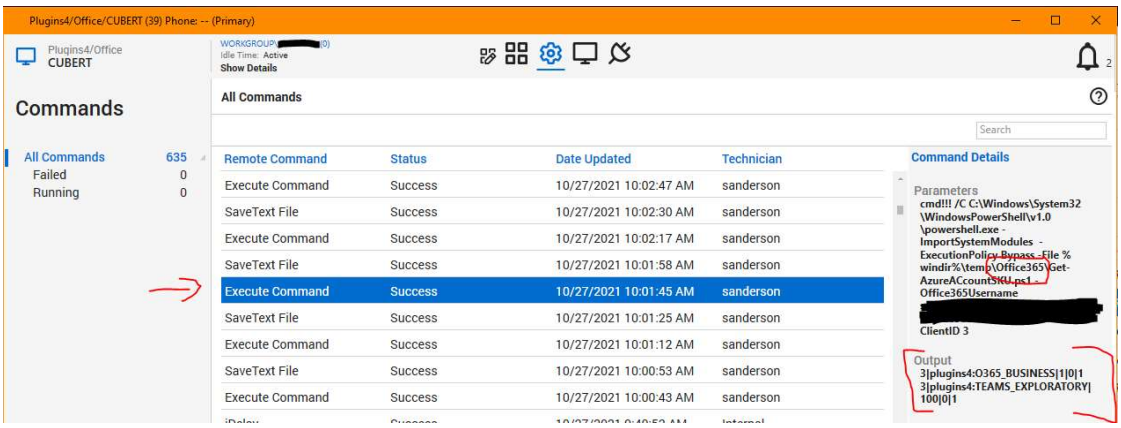


If all is accurate with permissions and the agent doing probe is “competent” you should get the following.



What is a competent probe?
An agent with a new OS (Windows10 or Server) with PowerShell 5.1 or newer. The Agent running as system service so that administrative privileges to install MS Online, Exchange and SharePoint PowerShell modules are available. The agent is always online and available to send commands to.

If you need to trouble shoot anything, you can visit the agent doing the probes command log section in agent console. Look for Executing CMD entries in logs and highlight to see return from command.



How-to -> Get Office365 REST Access

MSOL Events require the TenantID, ClientID and Secret Value for that collection to function.
If that data is accurate then you will also get event logs in automation and can seed your event logs manually with the Check MSOL button.

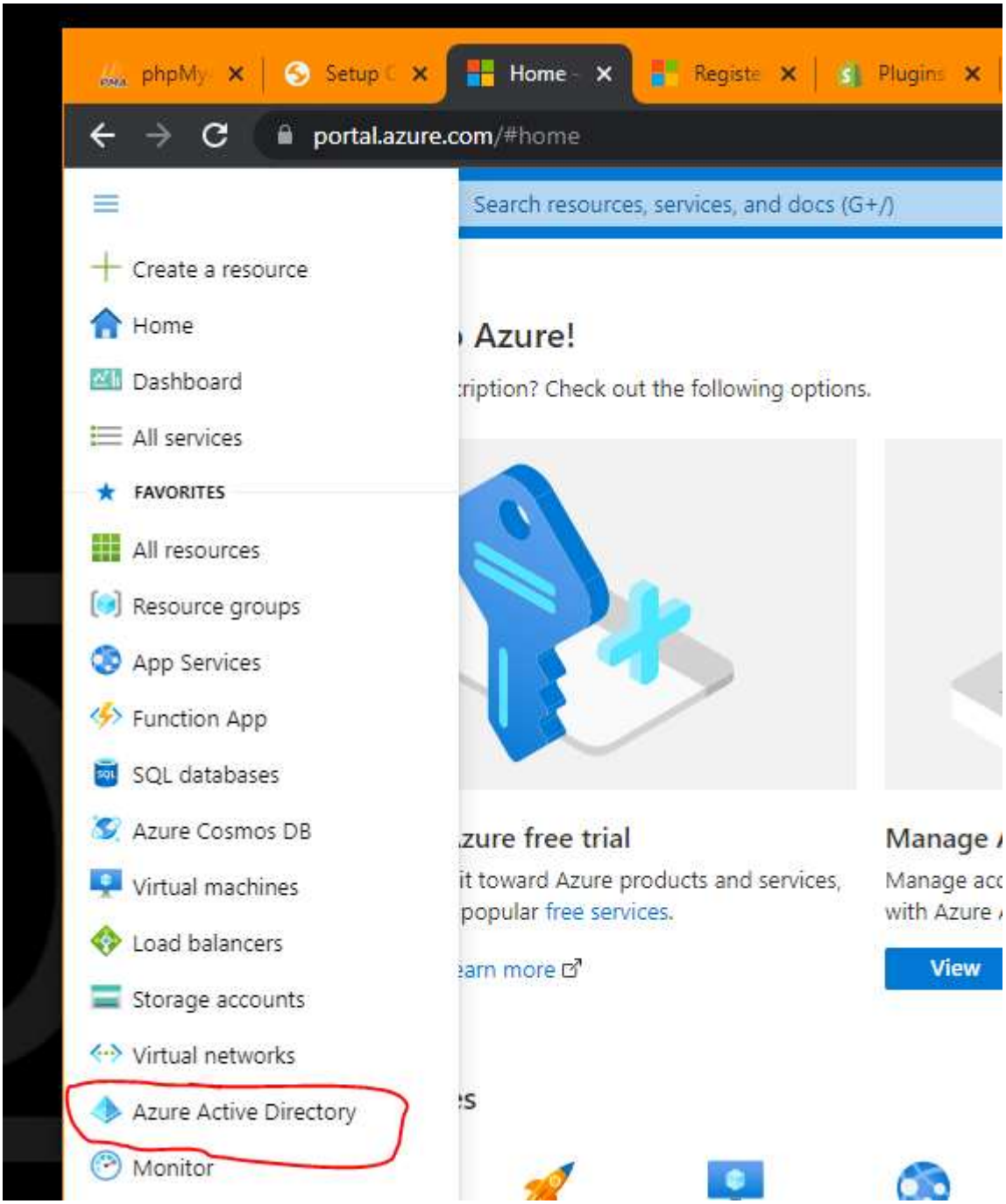
You will need to log into Office365.com and select the *Square Dots* button at the top of your home page.

Sign in to the Azure portal using either a work or school account or a personal Microsoft account.

https://portal.azure.com/

If your account gives you access to more than one tenant, select your account in the top right corner, and set your portal session to the Azure AD tenant that you want.

In the left-hand navigation pane, select the Azure Active Directory service, and then select App registrations > New registration.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Setup
Home
Registe
Plugins
portal.azure.com/#home
Search resources, services, and docs (G+/)
Create a resource
Home
Dashboard
All services
FAVORITES
All resources
Resource groups
App Services
Function App
SQL databases
Azure Cosmos DB
Virtual machines
Load balancers
Storage accounts
Virtual networks
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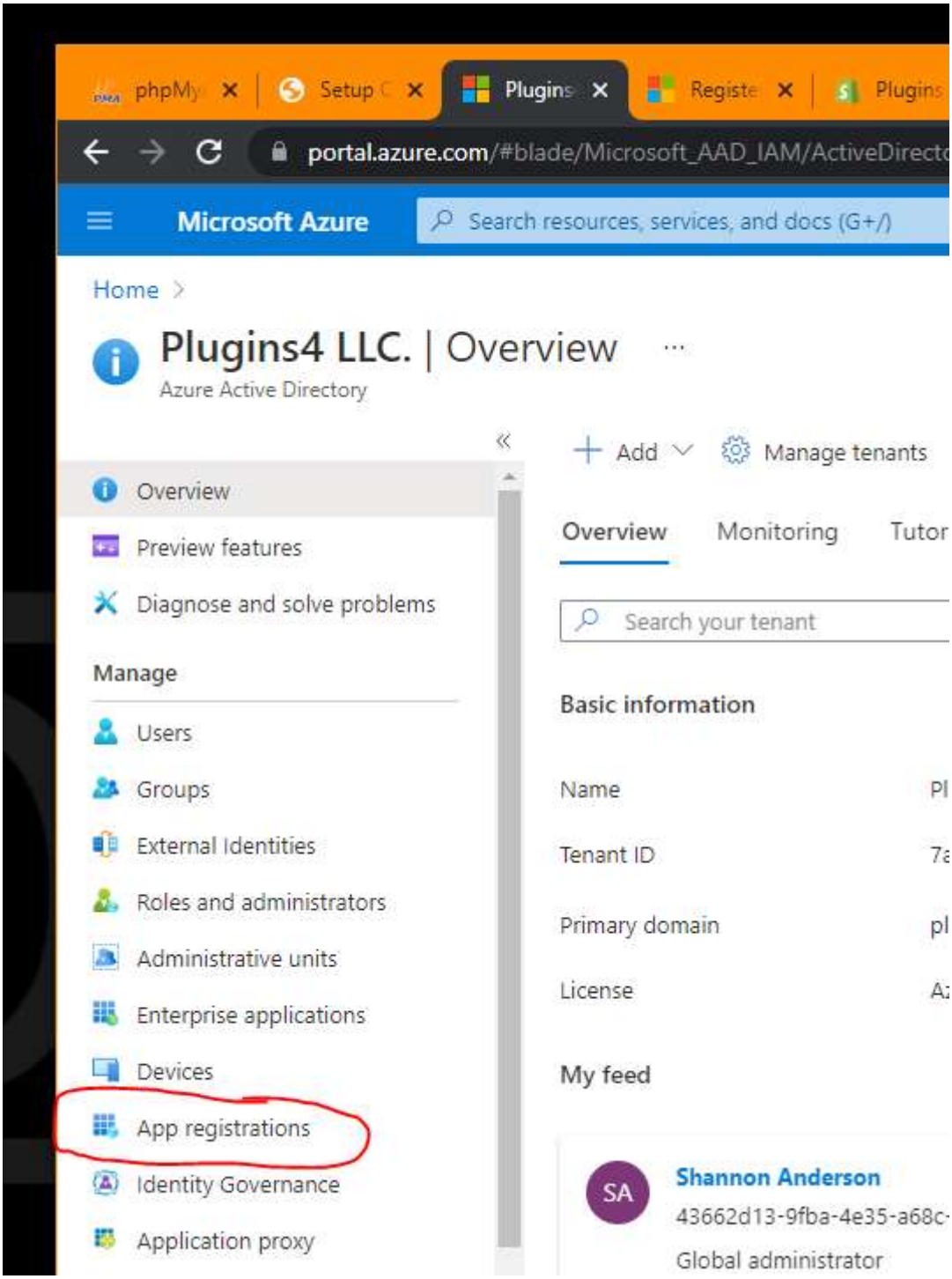
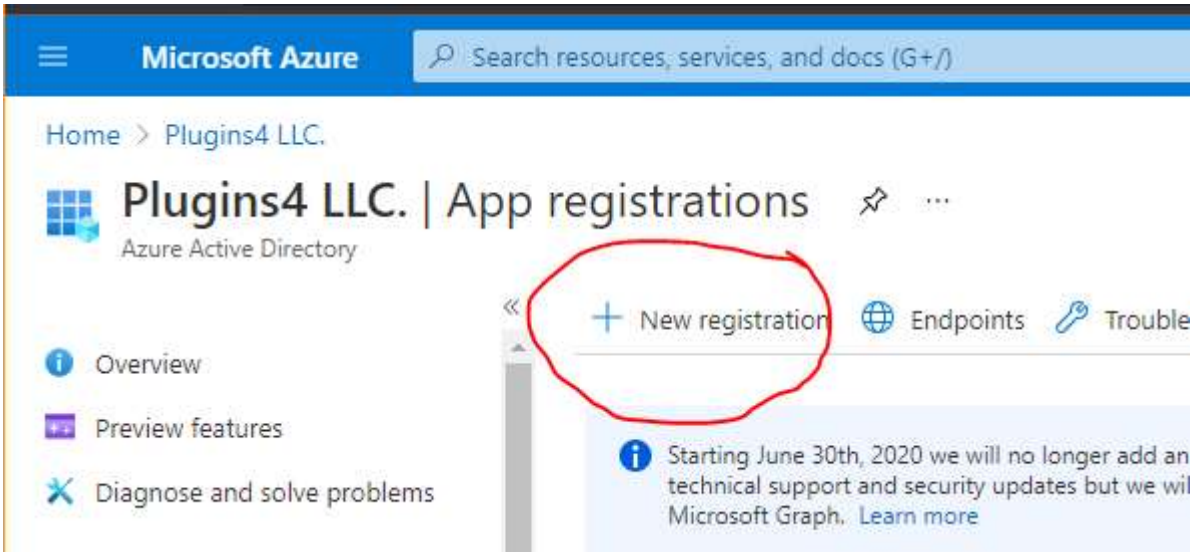
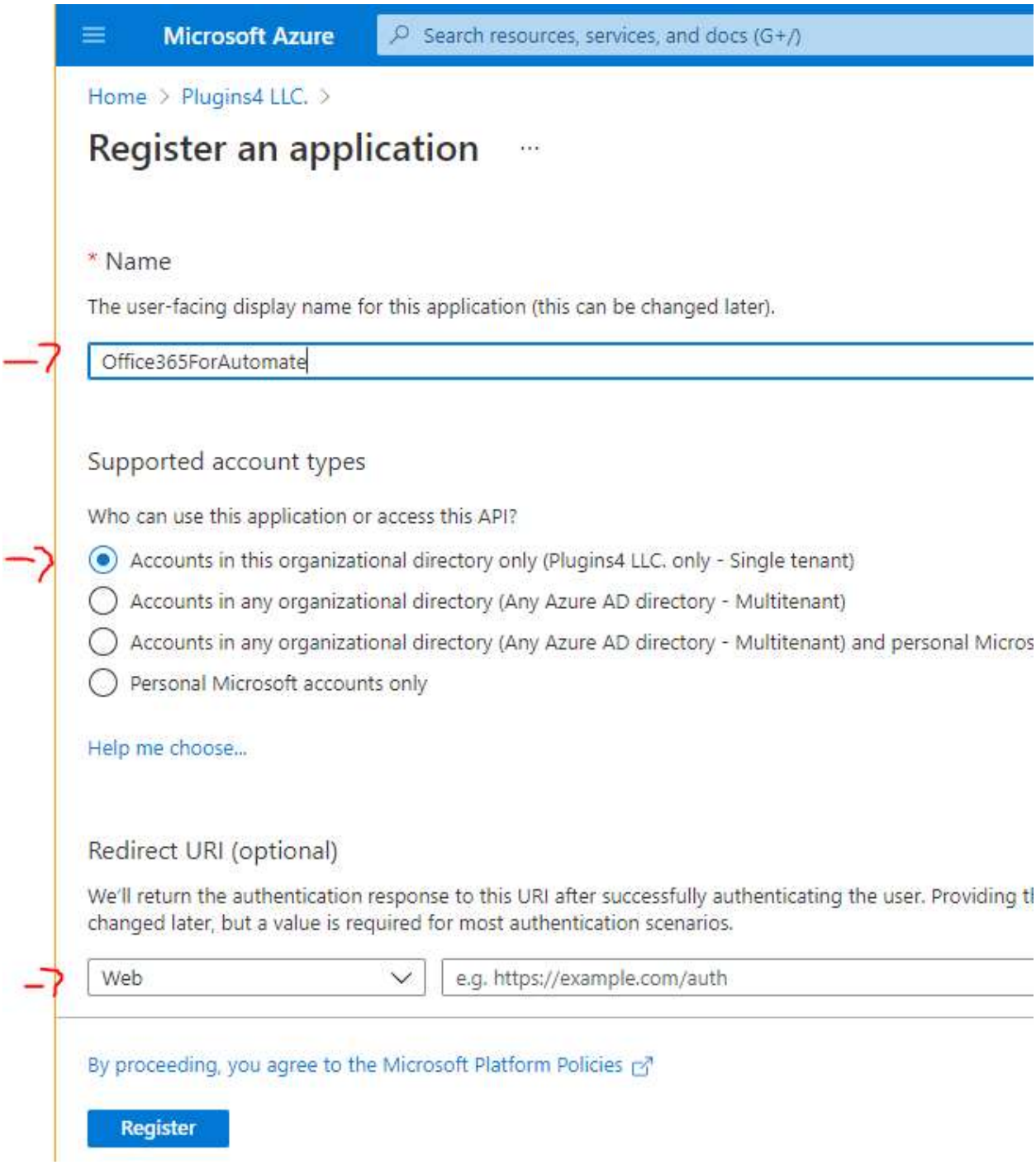


Now select *New Registration* from the top menu



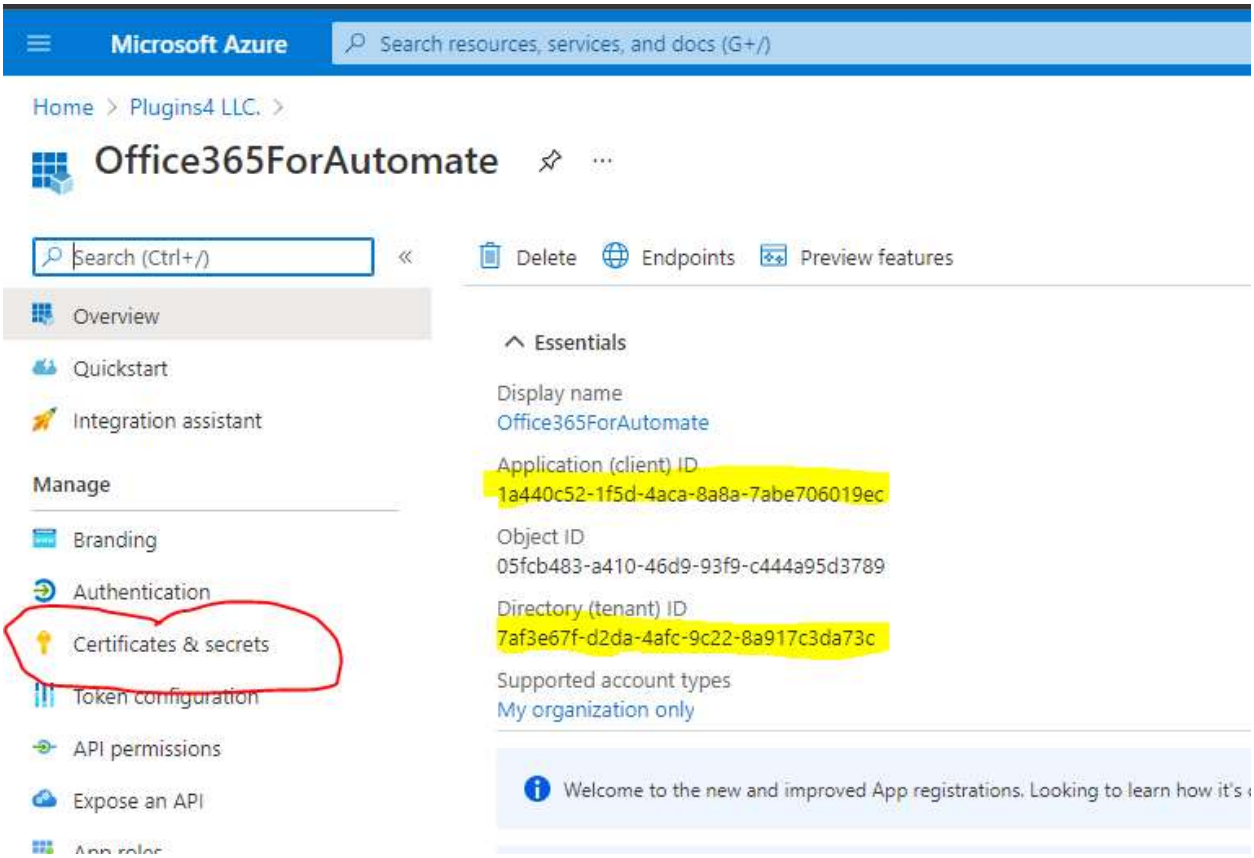
When the Register an application page appears, enter your application's registration information:

You will need the name and the account support type to be set. The Redirect is not used at all so can remain as is.

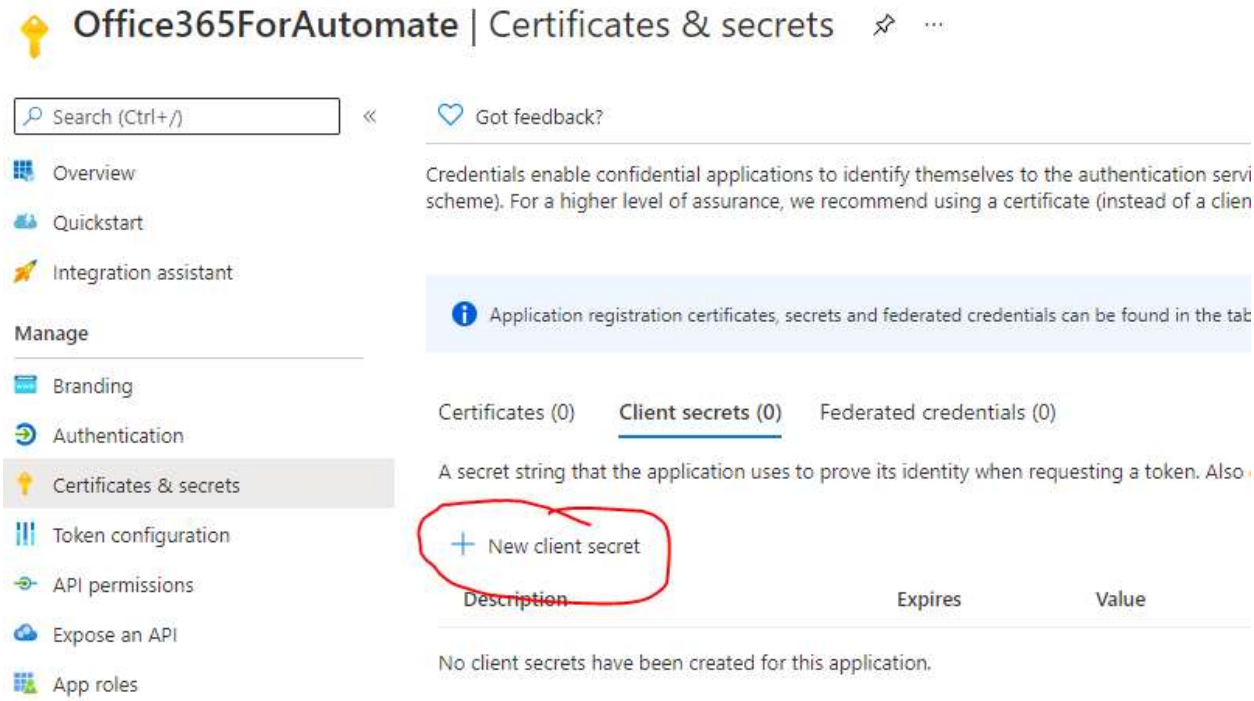


Select the Register button to complete new application registration. The next page displayed will have your “ClientID” and “TenantID”. You will need these ID’s so copy and paste them into a text file for later use. These will be the 2 of 3 key IDs needed to get rolling with REST API access.

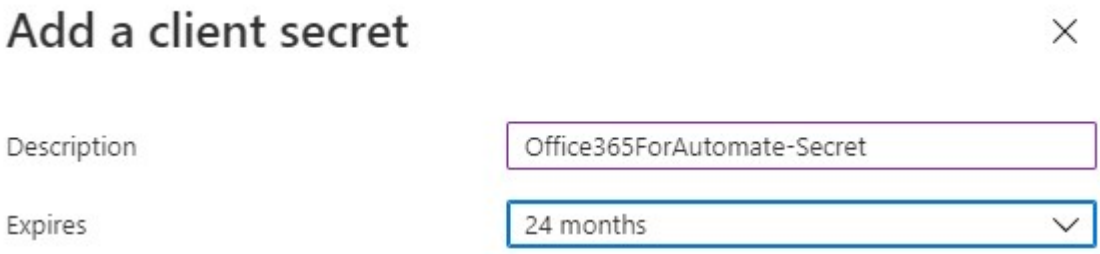
In the same window is the “Certificates & Secrets” menu item (Left Panel). You will need to select this to get the 3rd ID the “SecretID”.



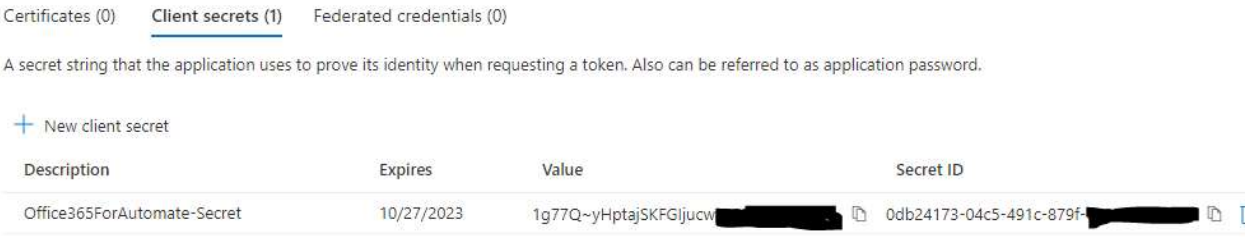
In the Certificate & Secrets panel select the “New client secret” button



In the Add a client secret pop up set the following information and click “Add”.



You will get a new Secret ID and “Value”



But Wait!!!

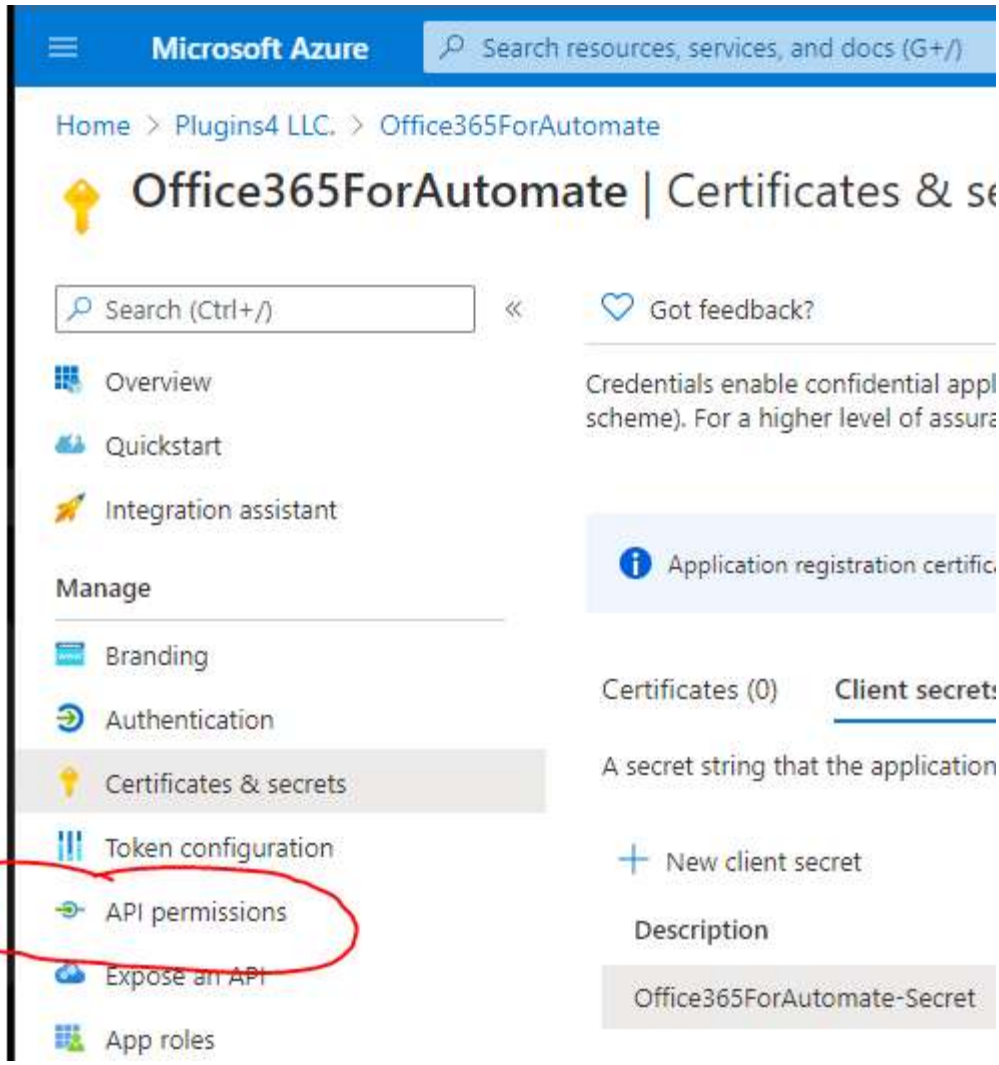
Not so fast….

You were about to grab “0db24173-04c5-491c-879” as your SecretID weren’t you? Everyone makes that mistake!

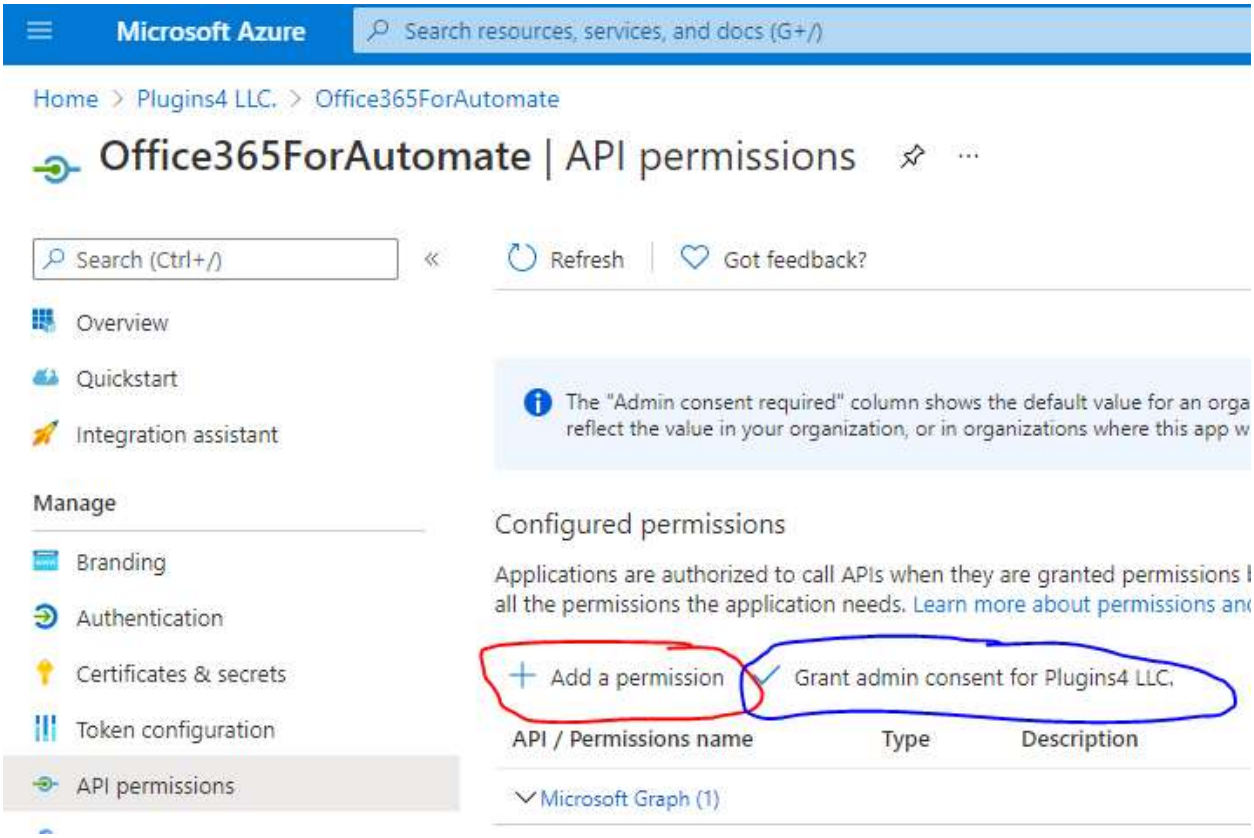
You want the “Value” of the SecretID as your SecretID..

You are still not done yet, yes you have the 3 IDs needed now but you still need to “Grant Permissions” to this new 3 ID combo.

Now select from the left menu the API permissions tool.

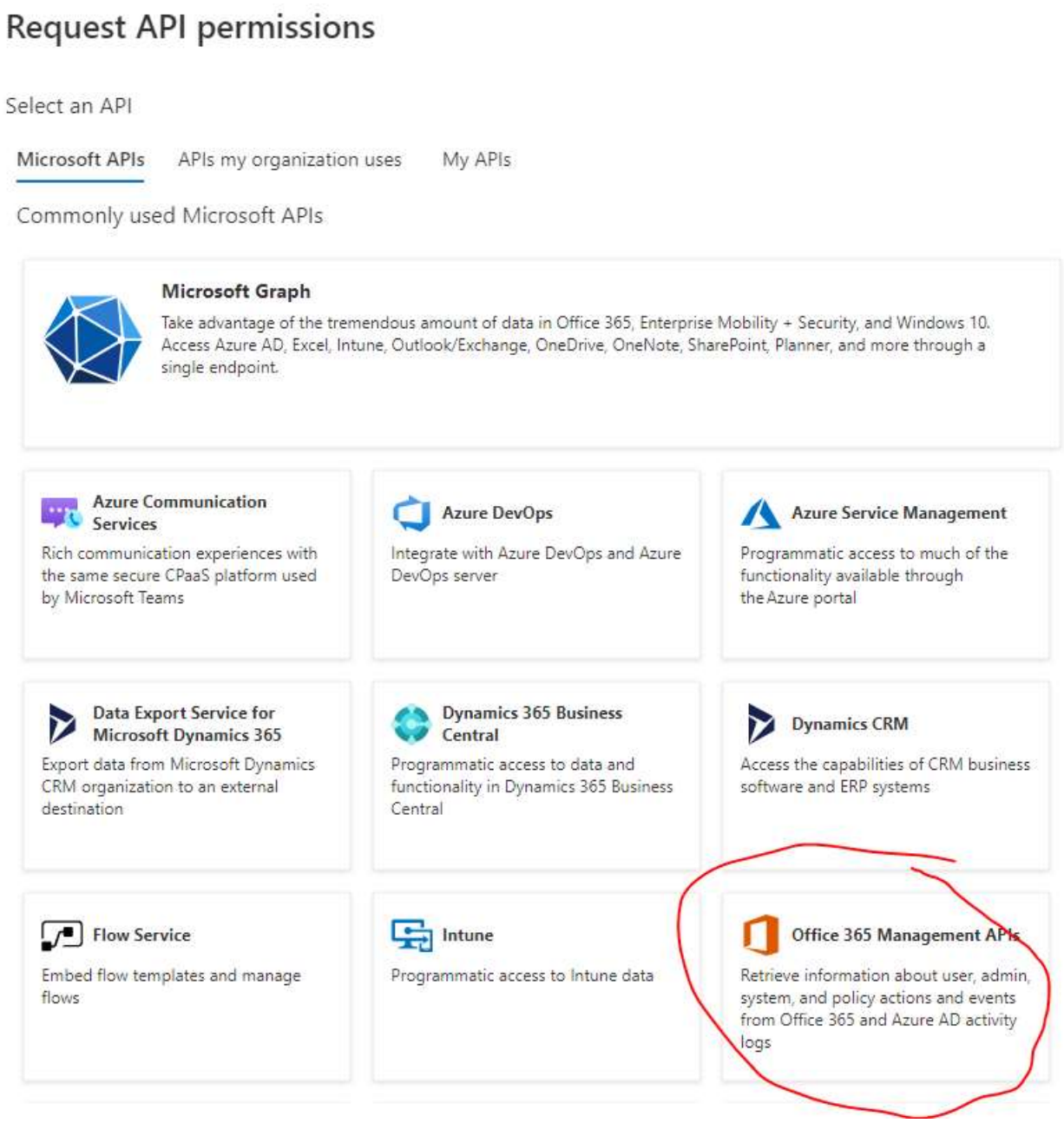


That will launch the following panel

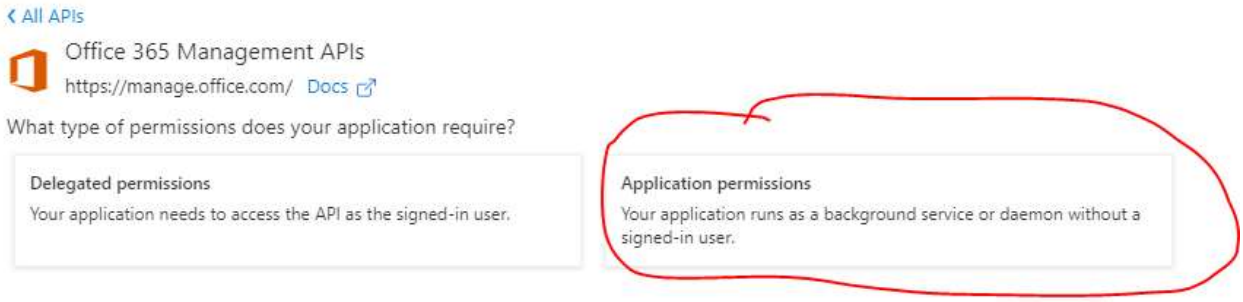


Select to add permissions button, remember the Grant Button exists.

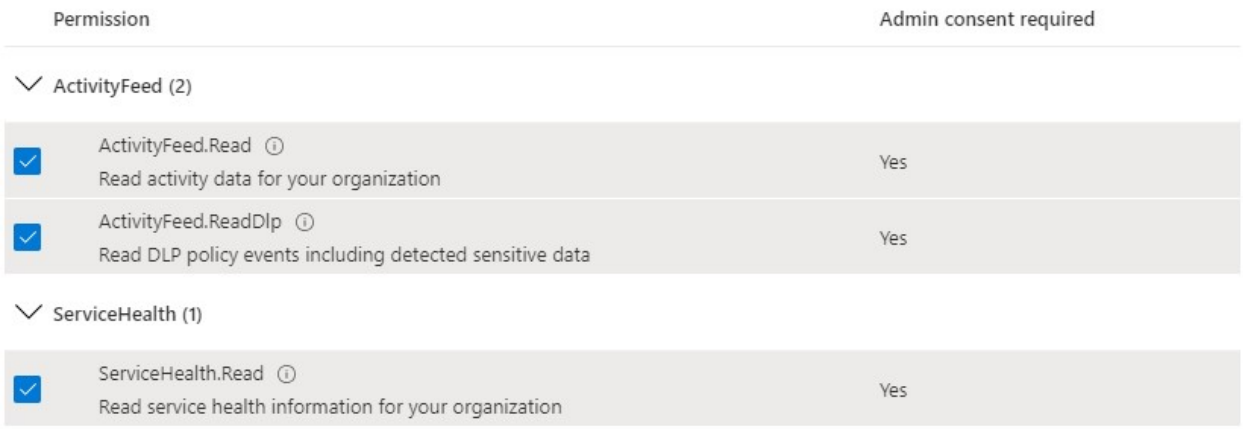
Add the Microsoft Office 365 Management API to your API permissions.



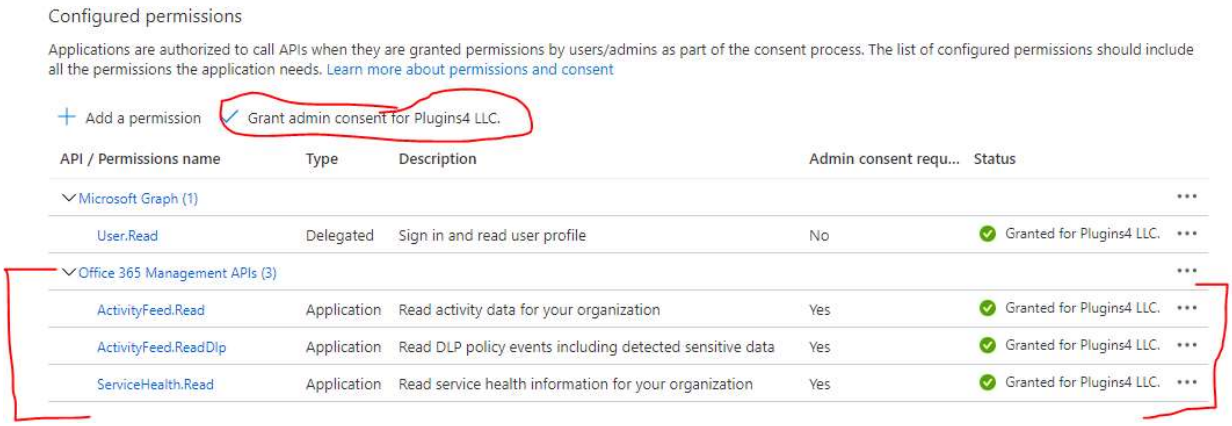
Select the permissions type as Application Permissions

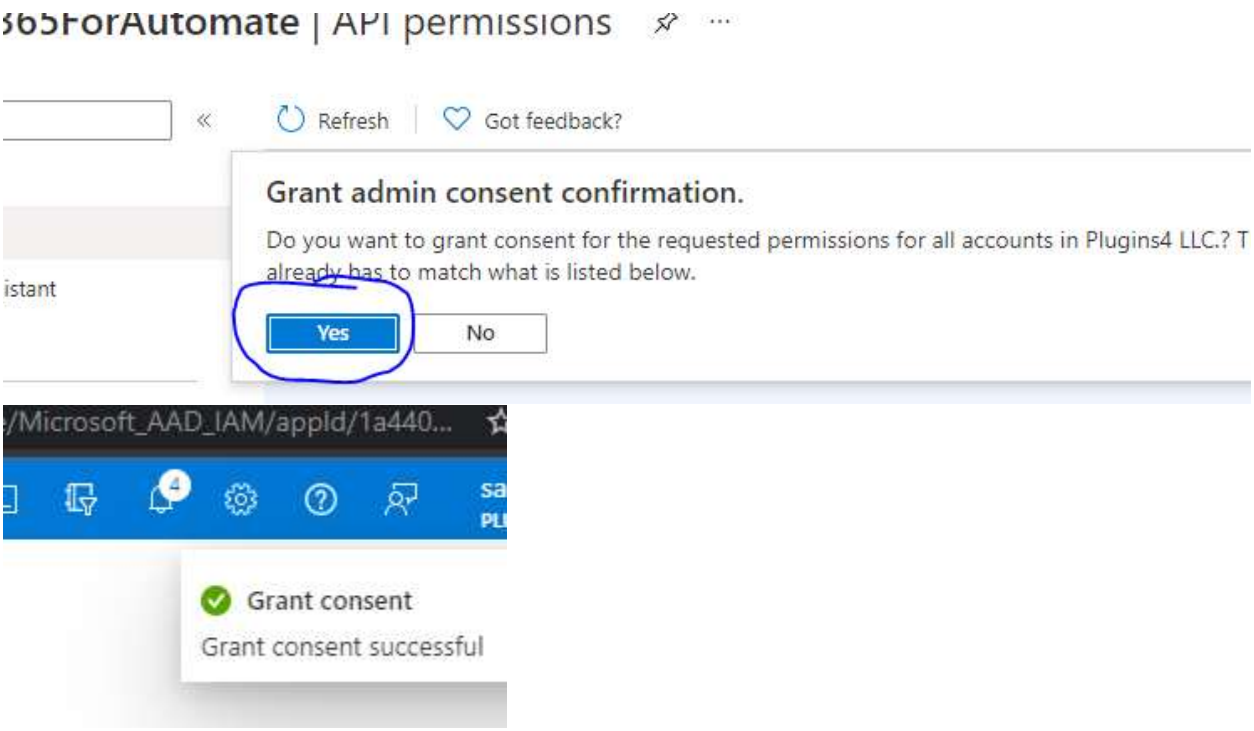


Next select the following 3 permission sets form API

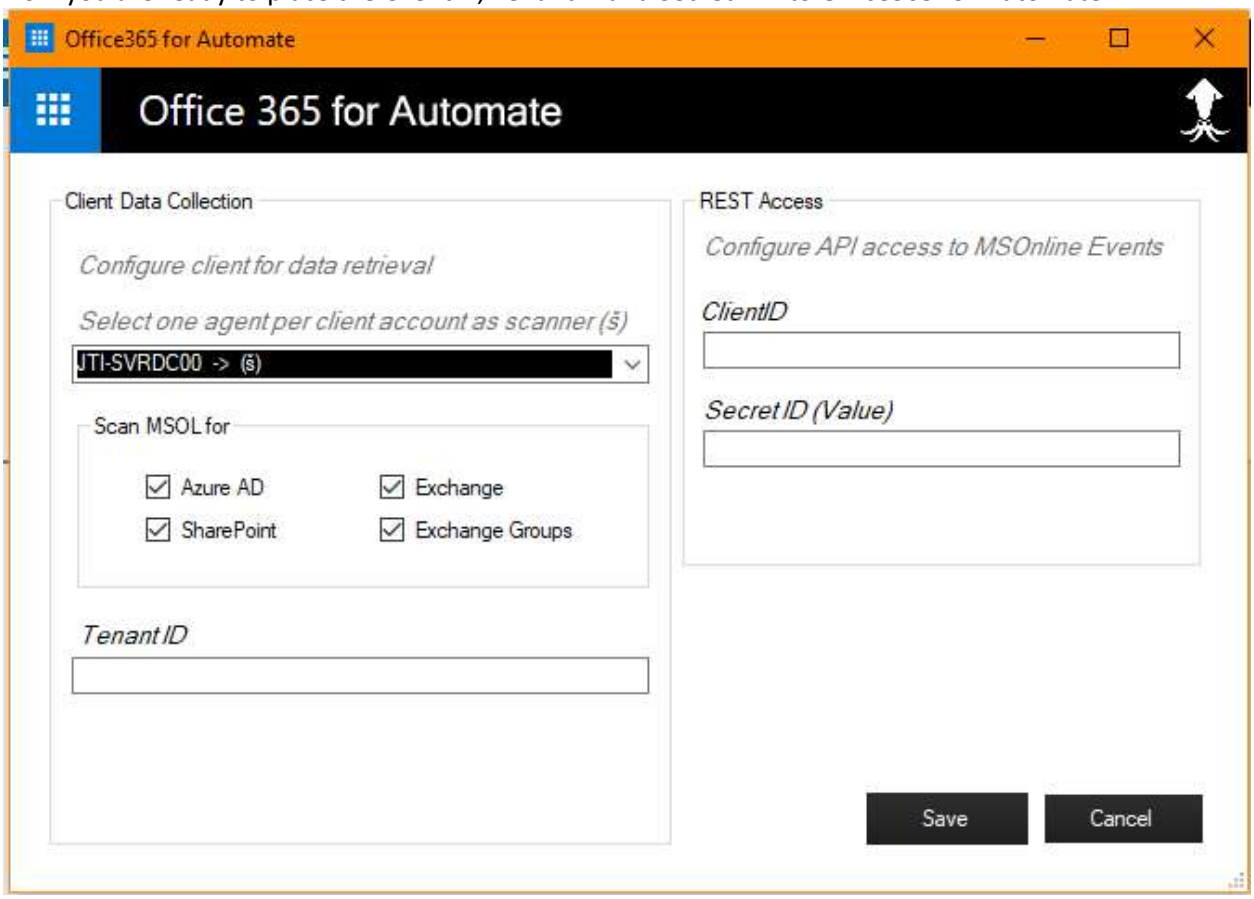


Here is where you will need to Select to Grant admin permissions.

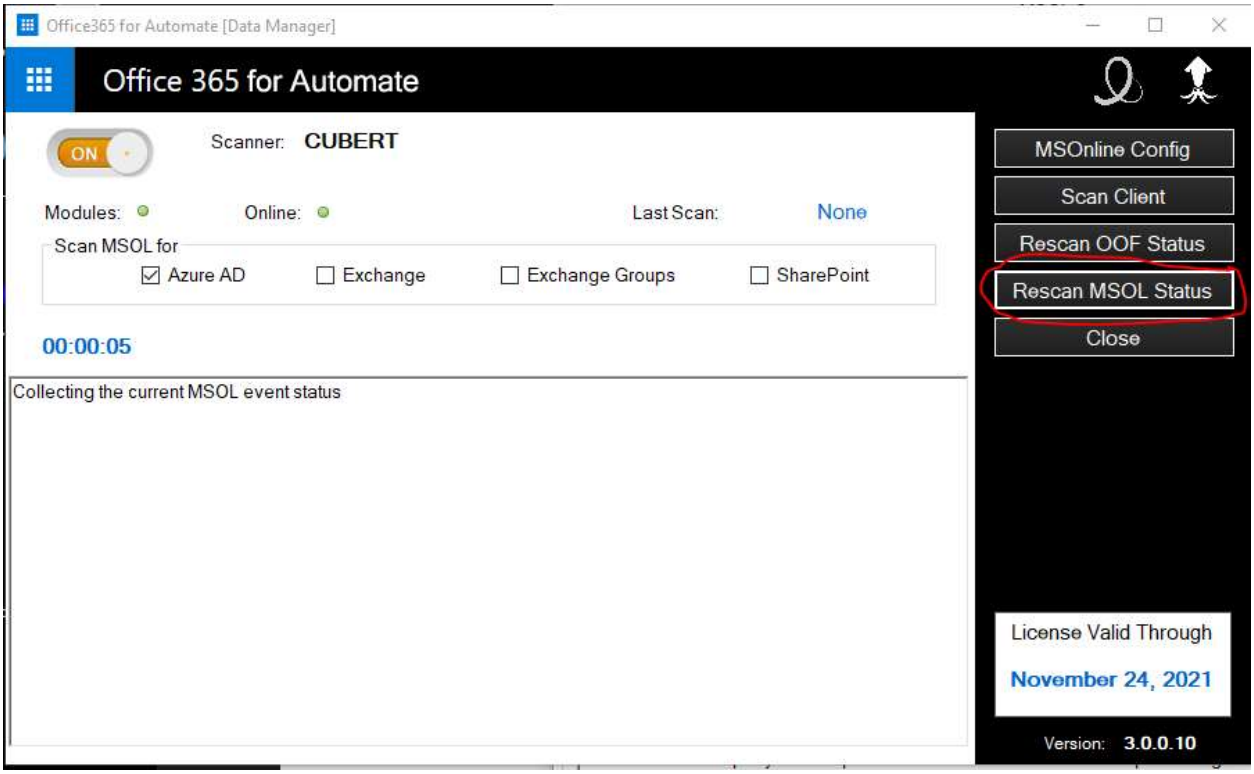




Now you are ready to place the ClientID, TenantID and SecretID into Office365 for Automate.



Afterwards go test the MSOL Status Scanner to see if you have any issues. It may take up to 10 minutes for the permissions to propagate down to the different services in MSOline so if at first it fails, wait a few minutes and try again.



Enjoy!