

# How to configure Office365 For Automate

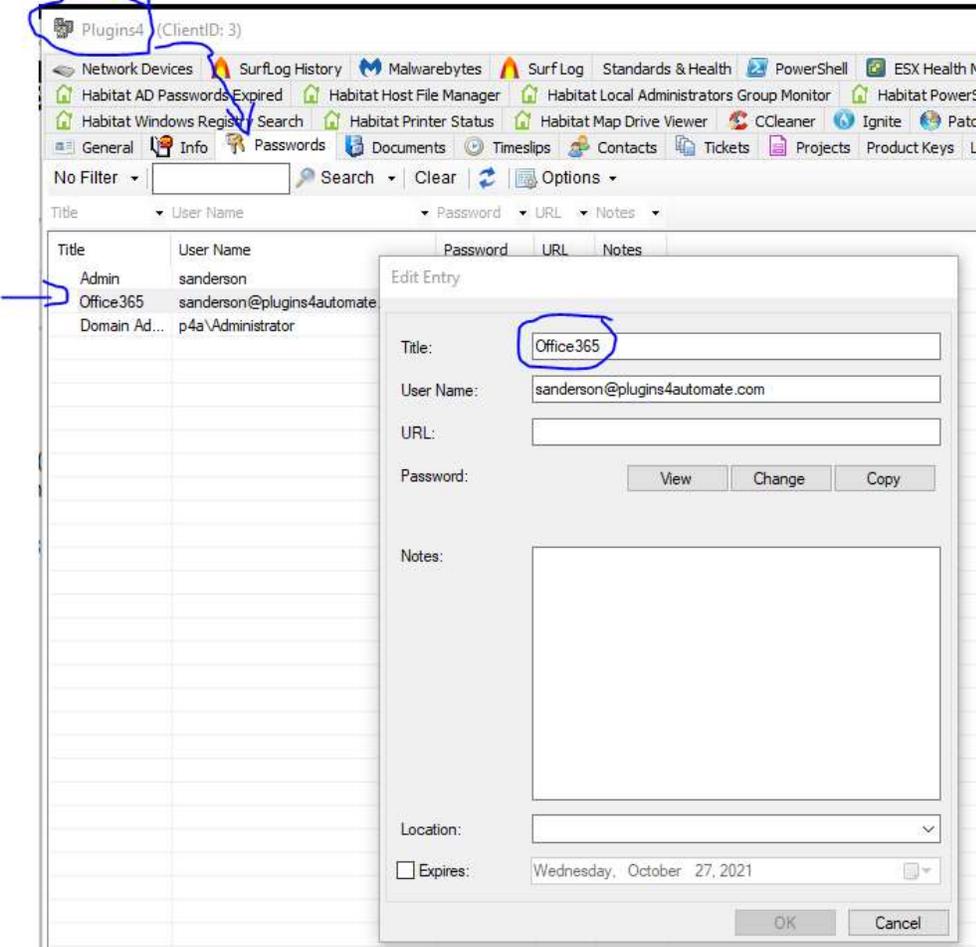
Here is the walk through on setting up a client to manage Office365.

Make sure you're on version 3.0.0.10

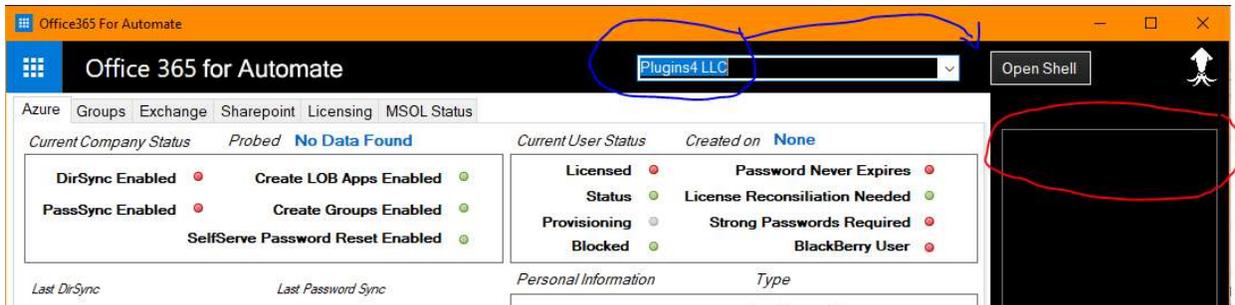
Here -> <https://delivery.shopifyapps.com/-/a4b6a6ca46620f33/2b5489044250b92a>

## How-to -> Setup Office 365 in ConnectWise Automate

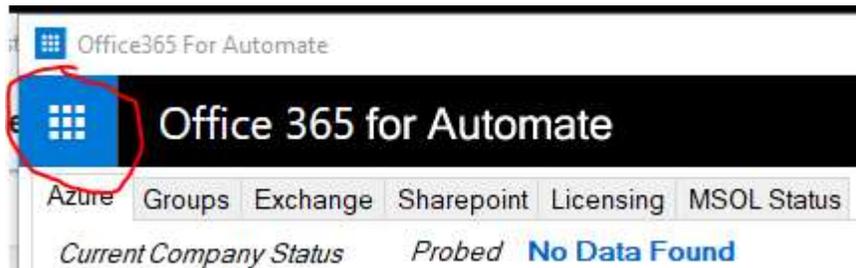
Make sure you have a client password and username here for each client you want to run Office365 for.



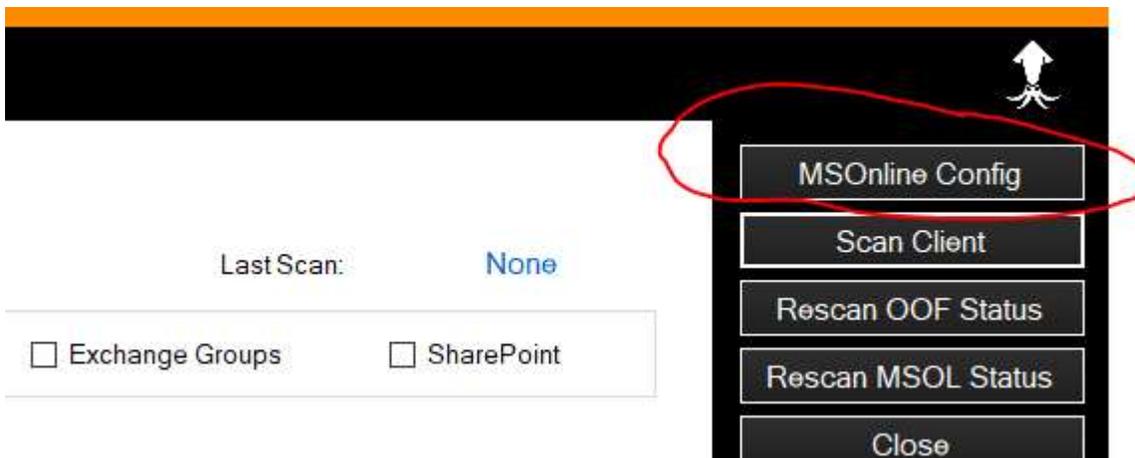
Now launch Office365 plugin and you should see this for client, The PowerShell console should now work but no user data available.



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.

Office365 for Automate

## Office 365 for Automate

Client Data Collection

*Configure client for data retrieval*

*Select one agent per client account as scanner (S)*

CUBERT -> (S)

Scan MSOL for

- Azure AD
- Exchange
- SharePoint
- Exchange Groups

Tenant ID

REST Access

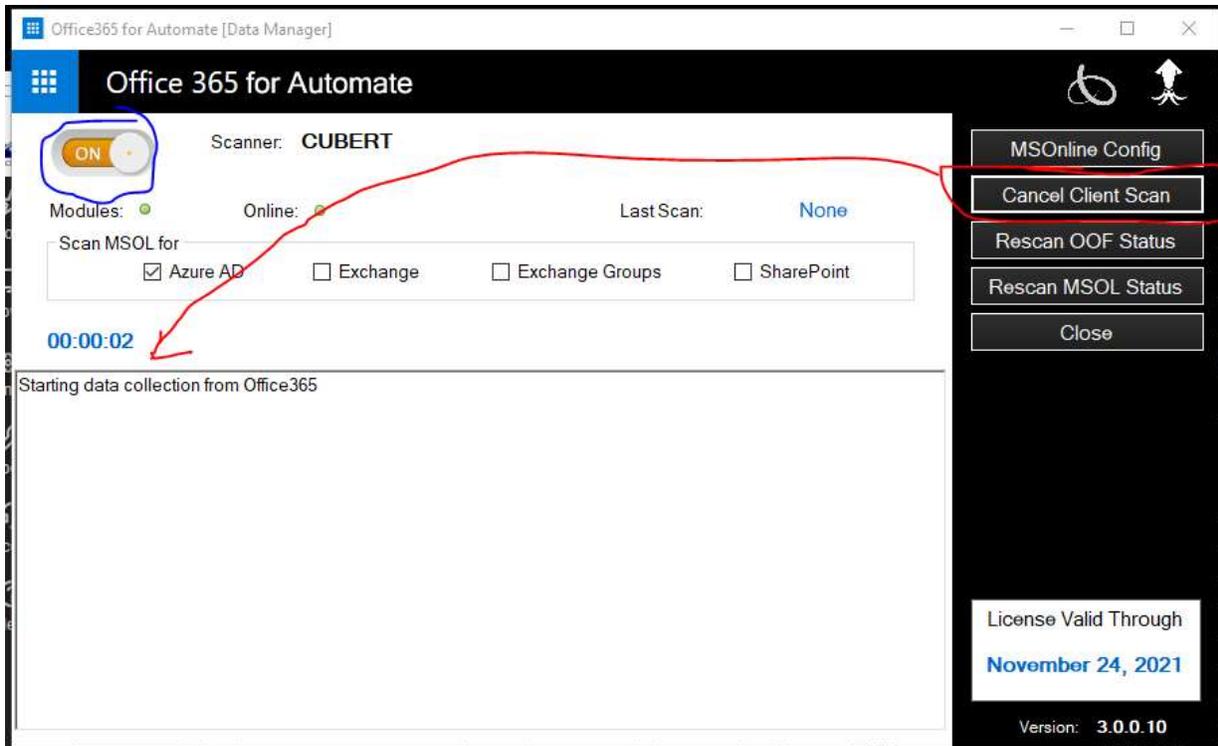
*Configure API access to MSOnline Events*

ClientID

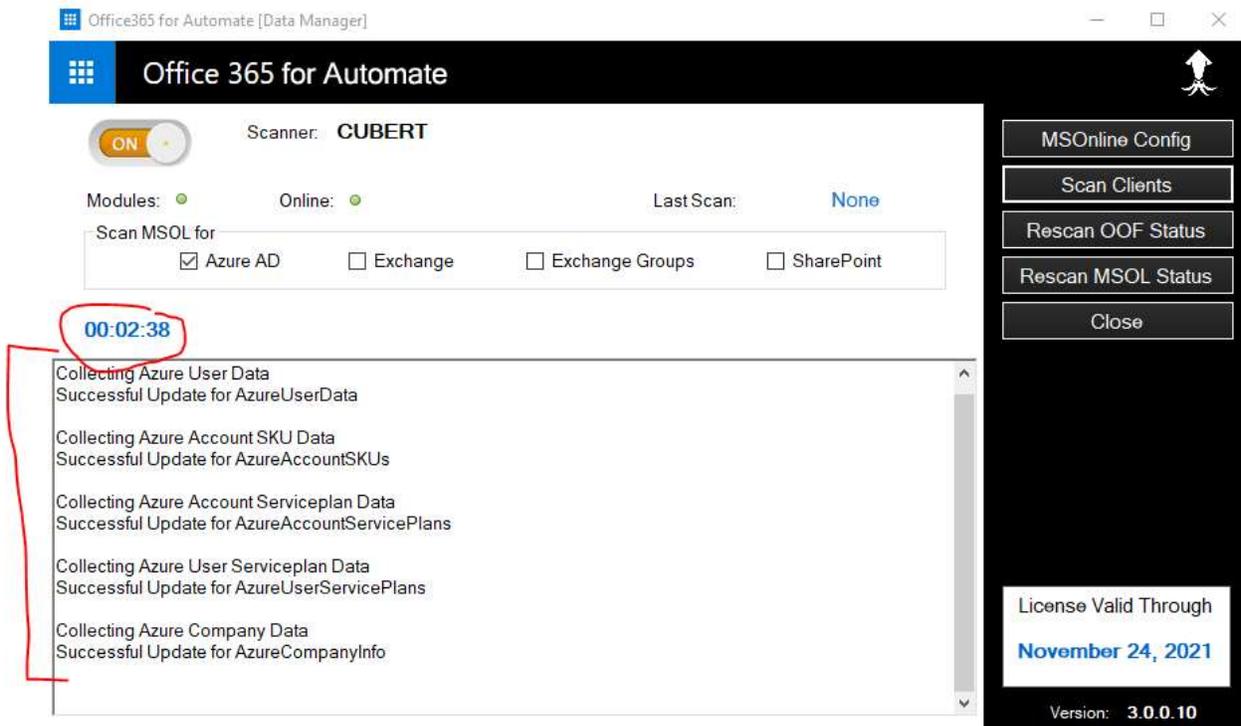
Secret ID (Value)

Save Cancel

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.



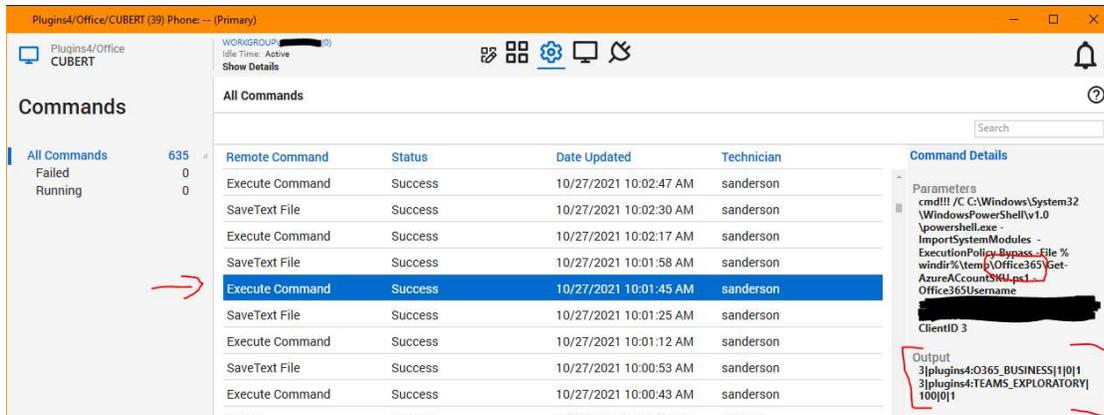
If all is accurate with permissions and the agent doing probe is “competent” you should get the following.



## 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.



Remote Command	Status	Date Updated	Technician
Execute Command	Success	10/27/2021 10:02:47 AM	sanderson
SaveText File	Success	10/27/2021 10:02:30 AM	sanderson
Execute Command	Success	10/27/2021 10:02:17 AM	sanderson
SaveText File	Success	10/27/2021 10:01:58 AM	sanderson
Execute Command	Success	10/27/2021 10:01:45 AM	sanderson
SaveText File	Success	10/27/2021 10:01:25 AM	sanderson
Execute Command	Success	10/27/2021 10:01:12 AM	sanderson
SaveText File	Success	10/27/2021 10:00:53 AM	sanderson
Execute Command	Success	10/27/2021 10:00:43 AM	sanderson

**Command Details**

Parameters  
cmd!!! /C C:\Windows\System32\WindowsPowerShell\v1.0\powershell.exe - Import-SystemModules - ExecutionPolicy Bypass -File %windir%\Temp\Office365\Get-AzureAccountSKU.ps1 - Office365Username [REDACTED] - ClientID 3

Output  
3|plugins4:0365 BUSINESS|1|0|1  
3|plugins4:TEAMS\_EXPLORATORY|100|0|1

## 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.

The image shows a browser window with the Azure portal home page. The browser's address bar displays `portal.azure.com/#home`. The navigation menu is open on the left side, listing various services. The 'Azure Active Directory' option is circled in red. The main content area features a search bar at the top, a 'Create a resource' button, and a section titled 'Welcome to Azure!' with a key icon. Below this, there are promotional cards for 'Azure free trial' and 'Manage your account', each with a 'View' button.

Browser tabs: phpMy x, Setup x, Home - x, Register x, Plugins x

Address bar: portal.azure.com/#home

Search bar: Search resources, services, and docs (G+/)

Navigation menu items:

- 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
- Azure Active Directory**
- Monitor

Main content area:

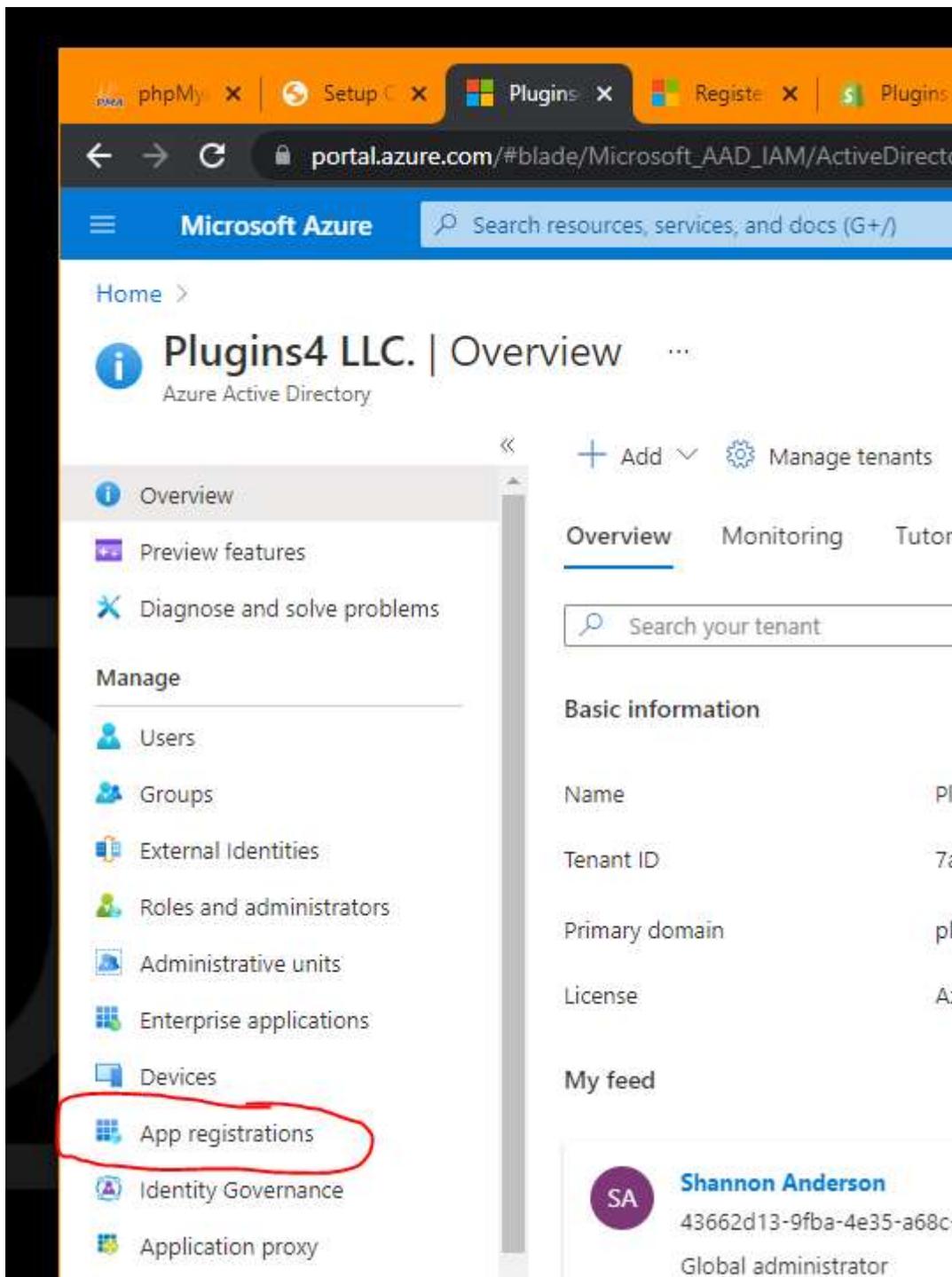
### Welcome to Azure!

description? Check out the following options.

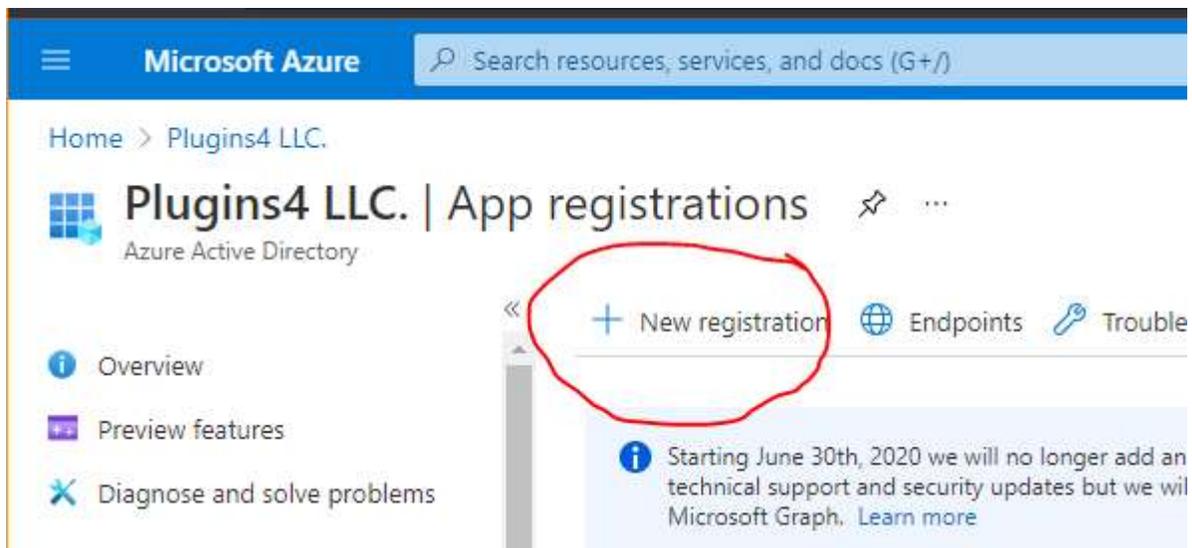


**Azure free trial**  
Get started with Azure products and services, including popular [free services](#).  
[Learn more](#)

**Manage your account**  
Manage your account with Azure.  
[View](#)



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.

Microsoft Azure Search resources, services, and docs (G+/)

Home > Plugins4 LLC. >

## Register an application ...

\* Name

The user-facing display name for this application (this can be changed later).

Office365ForAutomate

### Supported account types

Who can use this application or access this API?

Accounts in this organizational directory only (Plugins4 LLC. only - Single tenant)

Accounts in any organizational directory (Any Azure AD directory - Multitenant)

Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts

Personal Microsoft accounts only

[Help me choose...](#)

### Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this URI is optional, but a value is required for most authentication scenarios.

Web e.g. https://example.com/auth

By proceeding, you agree to the [Microsoft Platform Policies](#)

**Register**

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 3<sup>rd</sup> ID the "SecretID".

Microsoft Azure Search resources, services, and docs (G+)

Home > Plugins4 LLC. >

# Office365ForAutomate

Search (Ctrl+/) Delete Endpoints Preview features

- Overview
- Quickstart
- Integration assistant

Manage

- Branding
- Authentication
- Certificates & secrets**
- Token configuration
- API permissions
- Expose an API
- App roles

### Essentials

Display name  
Office365ForAutomate

Application (client) ID  
1a440c52-1f5d-4aca-8a8a-7abe706019ec

Object ID  
05fcb483-a410-46d9-93f9-c444a95d3789

Directory (tenant) ID  
7af3e67f-d2da-4afc-9c22-8a917c3da73c

Supported account types  
My organization only

Welcome to the new and improved App registrations. Looking to learn how it's

In the Certificate & Secrets panel select the "New client secret" button

# Office365ForAutomate | Certificates & secrets

Search (Ctrl+/) Got feedback?

- Overview
- Quickstart
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Manage

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Credentials enable confidential applications to identify themselves to the authentication service. For a higher level of assurance, we recommend using a certificate (instead of a client secret).

Application registration certificates, secrets and federated credentials can be found in the tab

Certificates (0) **Client secrets (0)** Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also

**+ New client secret**

Description	Expires	Value
No client secrets have been created for this application.		

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

## Add a client secret



Description

Office365ForAutomate-Secret

Expires

24 months

You will get a new Secret ID and “Value”

Certificates (0) Client secrets (1) Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

+ New client secret

Description	Expires	Value	Secret ID
Office365ForAutomate-Secret	10/27/2023	1g77Q~yHptajSKFGjjucw [REDACTED]	Odb24173-04c5-491c-879f- [REDACTED]

**But Wait!!!**

Not so fast....

You were about to grab “Odb24173-04c5-491c-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.

The image shows a screenshot of the Microsoft Azure portal. At the top, the header reads "Microsoft Azure" with a search bar containing the text "Search resources, services, and docs (G+/)". Below the header, the breadcrumb navigation shows "Home > Plugins4 LLC. > Office365ForAutomate". The main heading is "Office365ForAutomate | Certificates & secrets".

On the left side, there is a navigation menu with the following items:

- Overview
- Quickstart
- Integration assistant
- Manage
  - Branding
  - Authentication
  - Certificates & secrets
  - Token configuration
  - API permissions (circled in red)
  - Expose an API
  - App roles

On the right side, there is a "Got feedback?" link and a section titled "Application registration certificate". Below this, there are tabs for "Certificates (0)" and "Client secrets". The "Client secrets" tab is active, showing a description: "A secret string that the application" and a "+ New client secret" button. Below the button, there is a "Description" field containing the text "Office365ForAutomate-Secret".

That will launch the following panel

Microsoft Azure Search resources, services, and docs (G+)

Home > Plugins4 LLC. > Office365ForAutomate

## Office365ForAutomate | API permissions

Search (Ctrl+/) Refresh Got feedback?

- Overview
- Quickstart
- Integration assistant

Manage

- Branding
- Authentication
- Certificates & secrets
- Token configuration
- API permissions

The "Admin consent required" column shows the default value for an orga reflect the value in your organization, or in organizations where this app w

### Configured permissions

Applications are authorized to call APIs when they are granted permissions l all the permissions the application needs. [Learn more about permissions and](#)

API / Permissions name	Type	Description
<a href="#">+ Add a permission</a>	<input checked="" type="checkbox"/>	Grant admin consent for Plugins4 LLC.
Microsoft Graph (1)		

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

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

# Request API permissions

Select an API

Microsoft APIs   APIs my organization uses   My APIs

Commonly used Microsoft APIs

 <b>Microsoft Graph</b> Take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Azure AD, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.		
 <b>Azure Communication Services</b> Rich communication experiences with the same secure CPaaS platform used by Microsoft Teams	 <b>Azure DevOps</b> Integrate with Azure DevOps and Azure DevOps server	 <b>Azure Service Management</b> Programmatic access to much of the functionality available through the Azure portal
 <b>Data Export Service for Microsoft Dynamics 365</b> Export data from Microsoft Dynamics CRM organization to an external destination	 <b>Dynamics 365 Business Central</b> Programmatic access to data and functionality in Dynamics 365 Business Central	 <b>Dynamics CRM</b> Access the capabilities of CRM business software and ERP systems
 <b>Flow Service</b> Embed flow templates and manage flows	 <b>Intune</b> Programmatic access to Intune data	 <b>Office 365 Management APIs</b> Retrieve information about user, admin, system, and policy actions and events from Office 365 and Azure AD activity logs

Select the permissions type as Application Permissions

< All APIs



## Office 365 Management APIs

<https://manage.office.com/> [Docs](#)

What type of permissions does your application require?

### Delegated permissions

Your application needs to access the API as the signed-in user.

### Application permissions

Your application runs as a background service or daemon without a signed-in user.

Next select the following 3 permission sets form API

Permission	Admin consent required
ActivityFeed (2)	
<input checked="" type="checkbox"/> ActivityFeed.Read ⓘ Read activity data for your organization	Yes
<input checked="" type="checkbox"/> ActivityFeed.ReadDlp ⓘ Read DLP policy events including detected sensitive data	Yes
ServiceHealth (1)	
<input checked="" type="checkbox"/> ServiceHealth.Read ⓘ Read service health information for your organization	Yes

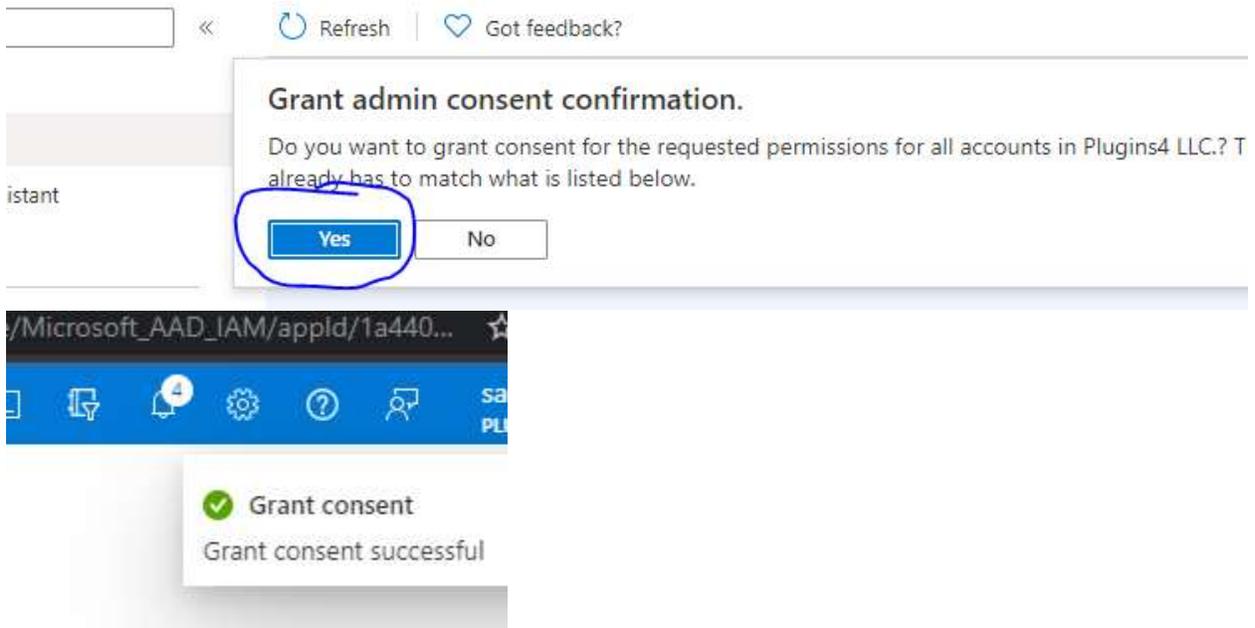
Here is where you will need to Select to Grant admin permissions.

### Configured permissions

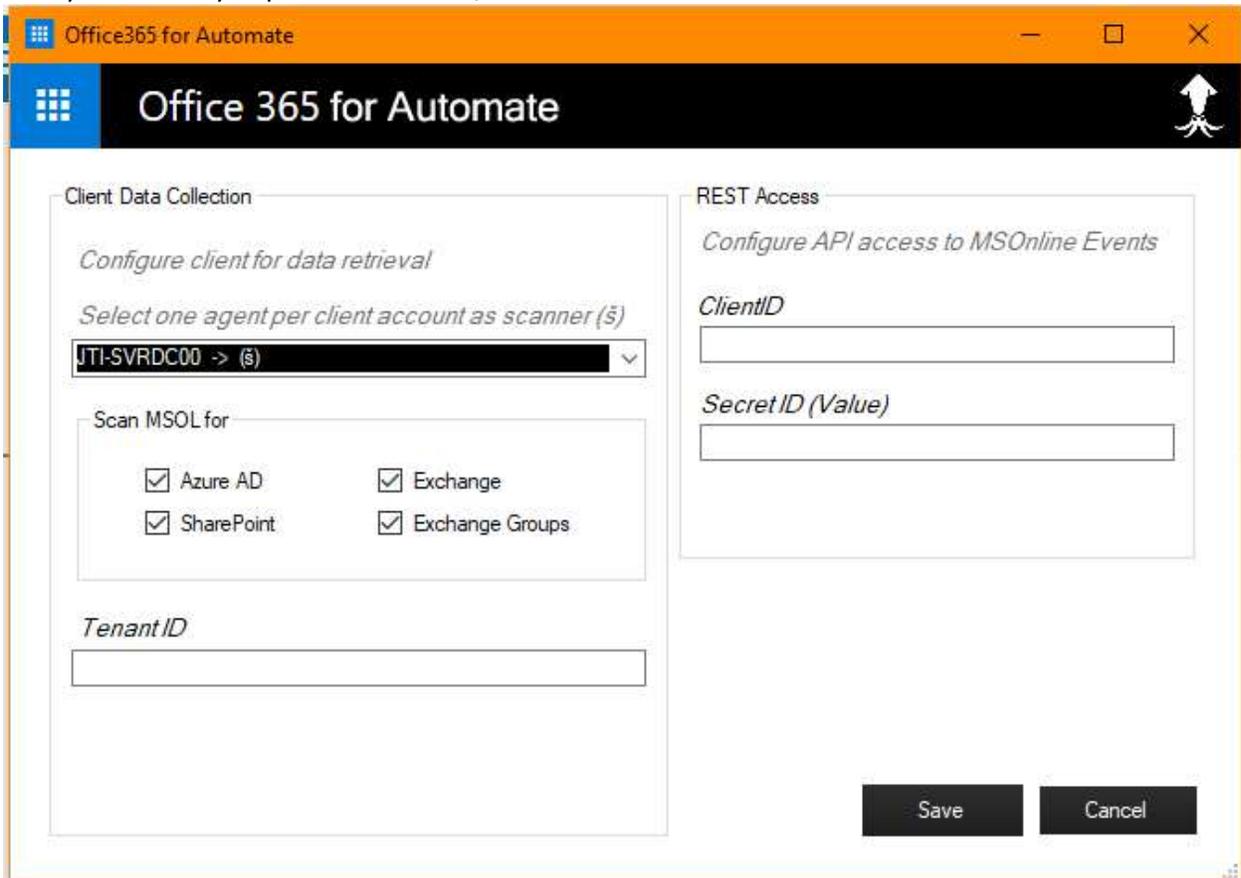
Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission  Grant admin consent for Plugins4 LLC.

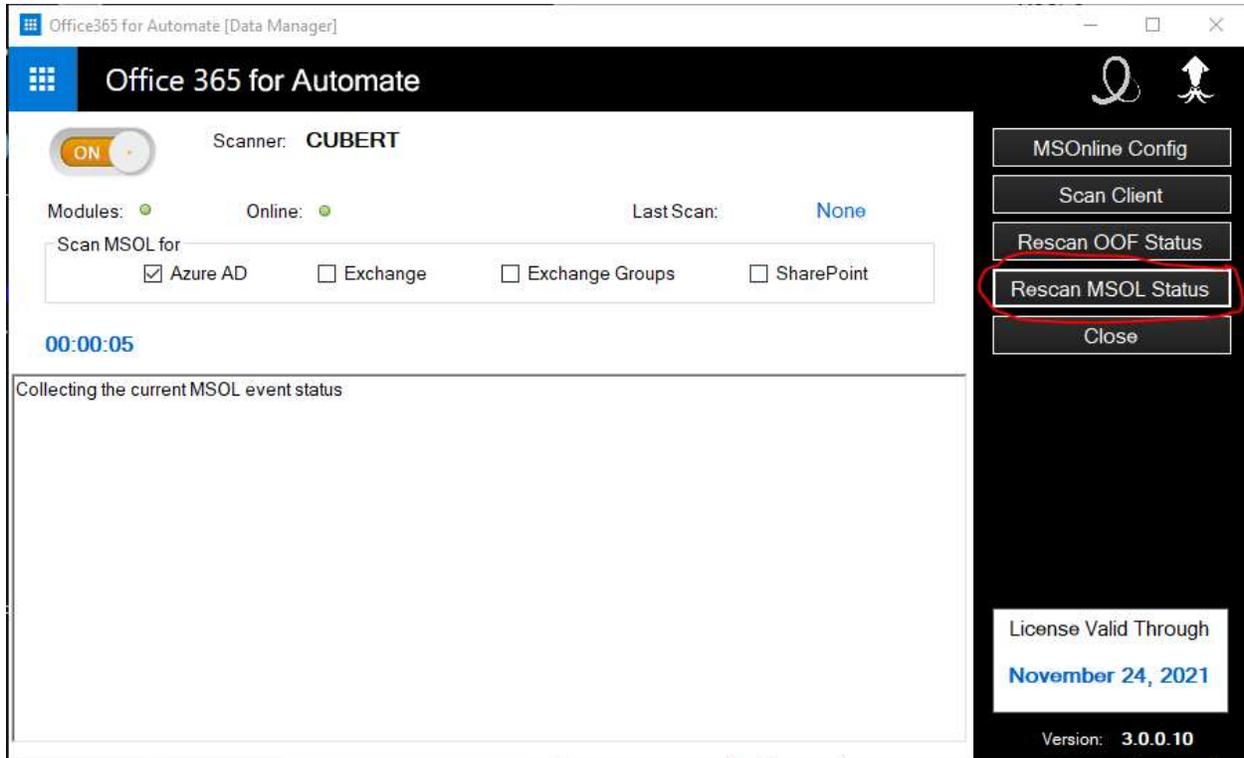
API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (1)				...
User.Read	Delegated	Sign in and read user profile	No	✔ Granted for Plugins4 LLC. ...
Office 365 Management APIs (3)				...
ActivityFeed.Read	Application	Read activity data for your organization	Yes	✔ Granted for Plugins4 LLC. ...
ActivityFeed.ReadDlp	Application	Read DLP policy events including detected sensitive data	Yes	✔ Granted for Plugins4 LLC. ...
ServiceHealth.Read	Application	Read service health information for your organization	Yes	✔ Granted for Plugins4 LLC. ...



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!