



OneDrive & Sharepoint Integration

Version 2.0, October 2022

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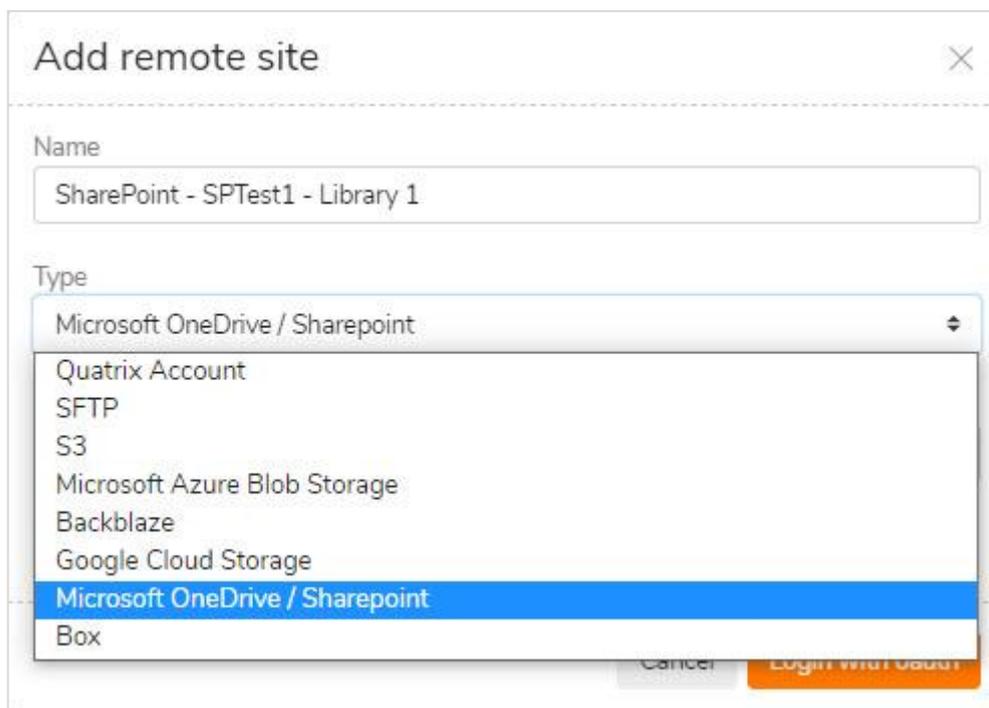


This guide is intended to assist with creating a connection and workflow to SharePoint or OneDrive. For additional general information about Workflows and Remote Sites, [visit our Help Centre](#).

Adding a Remote Site

In the “Remote Sites” menu there is the option to choose Microsoft OneDrive/SharePoint as a remote site.

Determine whether you will connect to OneDrive or Sharepoint and use the “Name” field to help describe the connection. For example, you may wish to use the name field to note the Sharepoint “Site” you are connecting to, and the specific library or folders within the site.



Add remote site [Close]

Name
SharePoint - SPTest1 - Library 1

Type
Microsoft OneDrive / Sharepoint [Dropdown Arrow]

- Quatrix Account
- SFTP
- S3
- Microsoft Azure Blob Storage
- Backblaze
- Google Cloud Storage
- Microsoft OneDrive / Sharepoint**
- Box

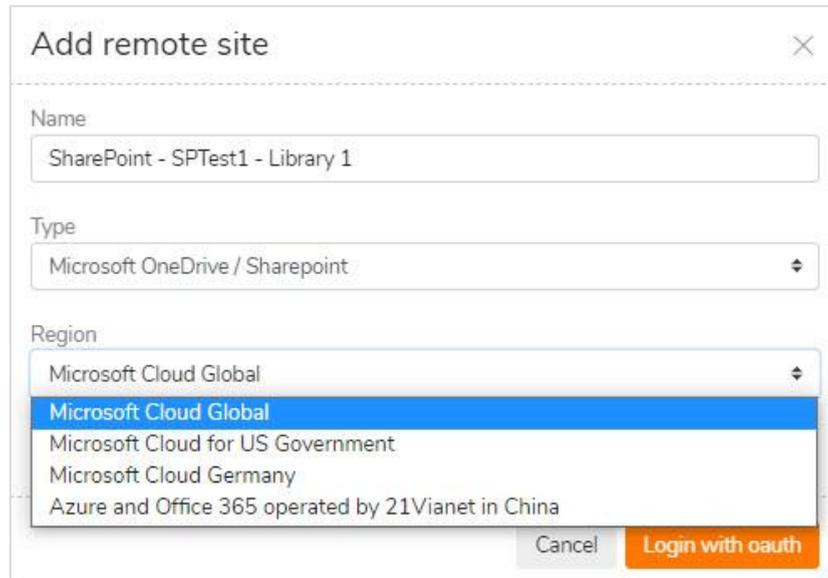
Cancel Login with Quatrix

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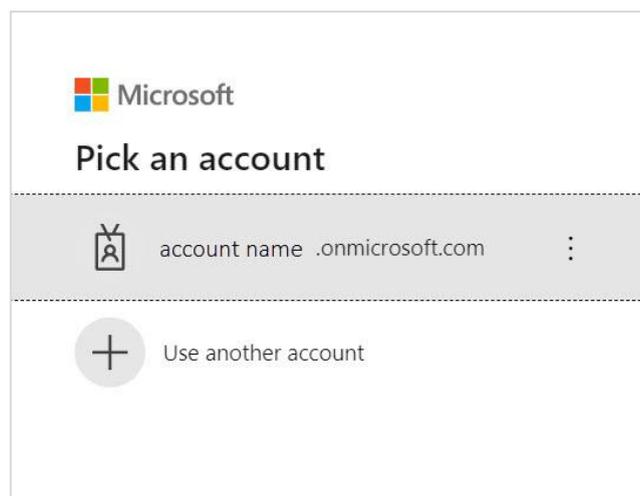
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After selecting Microsoft OneDrive / SharePoint as the “Type”, then choose the region where your Microsoft 365 OneDrive or Sharepoint account reside.



Once the fields have been populated, choose to “Login with Oauth”.

This should direct you to log into a Microsoft 365 account, unless already logged in.

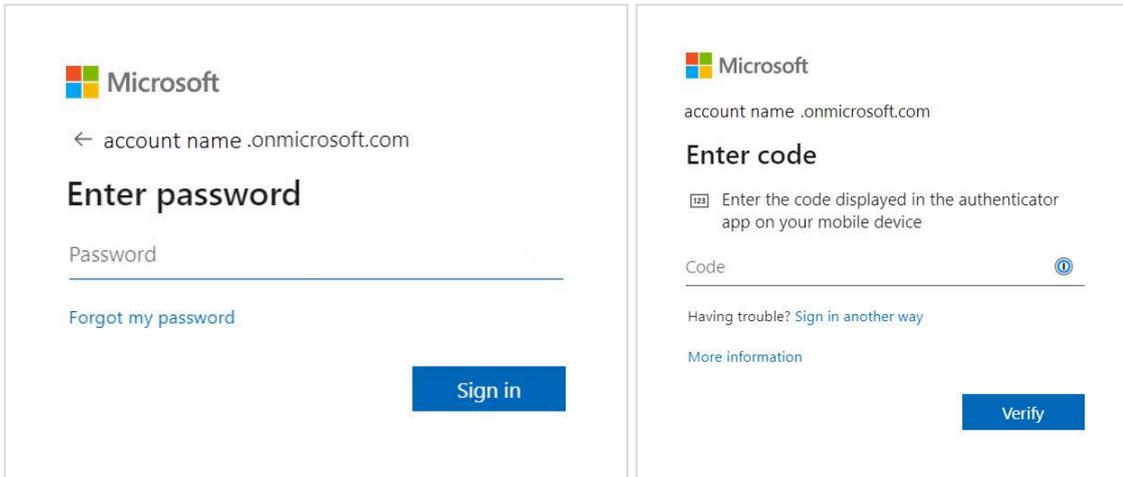


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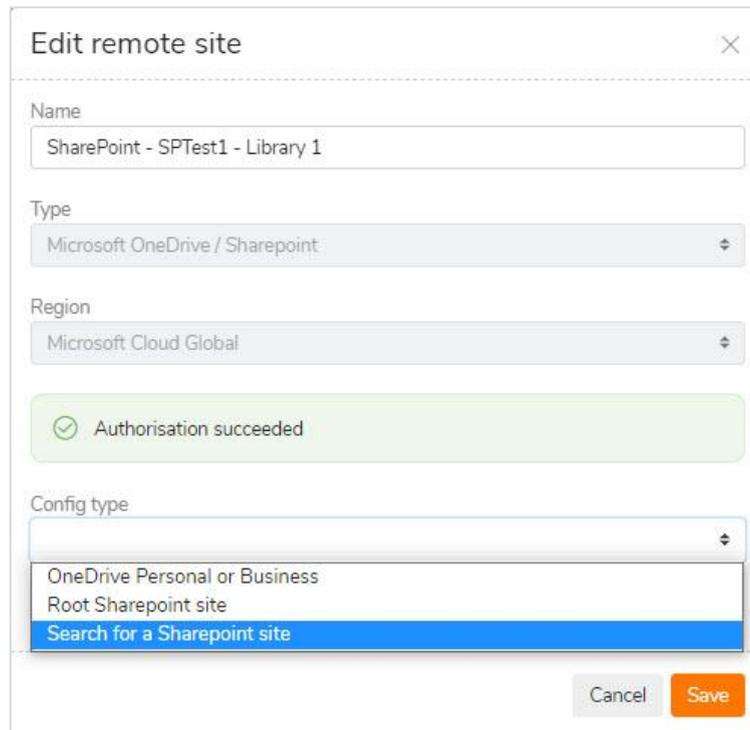
Provide credentials to authenticate and gain access.



The first screenshot shows the Microsoft login page with the text "Microsoft", "account name .onmicrosoft.com", "Enter password", a password input field, a "Forgot my password" link, and a blue "Sign in" button.

The second screenshot shows the Microsoft verification page with the text "Microsoft", "account name .onmicrosoft.com", "Enter code", a checkbox "Enter the code displayed in the authenticator app on your mobile device", a code input field, a "Verify" button, and links for "Having trouble? Sign in another way" and "More information".

After successful linkage Quatrix will display an “Authorisation succeeded” message.



The "Edit remote site" dialog box contains the following elements:

- Name:** SharePoint - SPTest1 - Library 1
- Type:** Microsoft OneDrive / Sharepoint
- Region:** Microsoft Cloud Global
- Message:** A green banner with a checkmark icon and the text "Authorisation succeeded".
- Config type:** A dropdown menu with options: "OneDrive Personal or Business", "Root Sharepoint site", and "Search for a Sharepoint site" (highlighted in blue).
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

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You should now choose whether you want to access your SharePoint or OneDrive service.

If the workflow you are planning on creating will be transferring files between a specific SharePoint site, then you can use the search capability to list the sites your Microsoft account has access to.

Edit remote site ✕

Name
SharePoint - SPTest1 - Library 1

Type
Microsoft OneDrive / Sharepoint

Region
Microsoft Cloud Global

✓ Authorisation succeeded

Config type
Search for a Sharepoint site

Search string
* Search

Site URL

SPTest1	.sharepoint.com/sites/SPTest)
Communication site	.sharepoint.com)
Team Site	sharepoint.com/sites/contentTypeHub)
mctx2qa	.sharepoint.com/sites/mctx2qa)

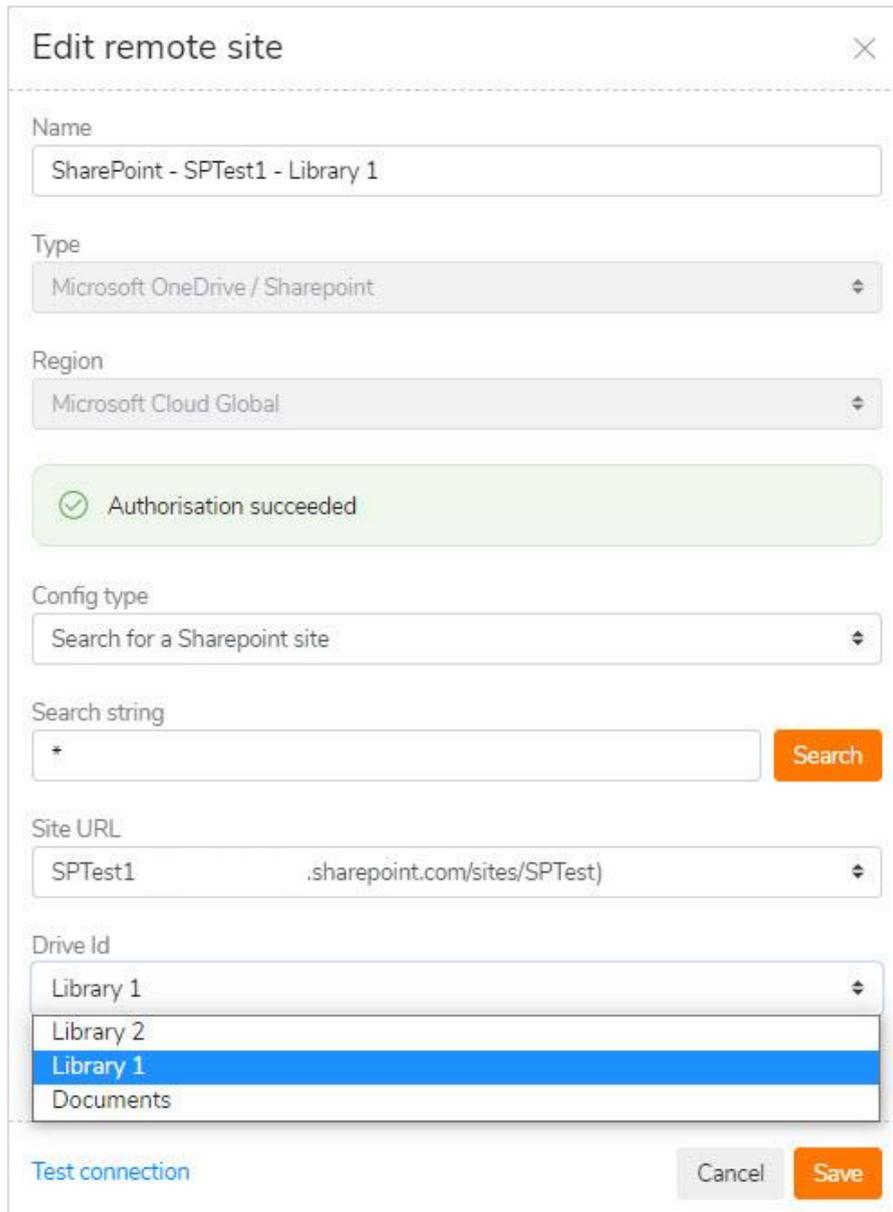
Cancel Save

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Once the list of SharePoint sites is displayed, and you have selected the desired site, you can then choose a specific library within the SharePoint site you wish to connect to. Use the Drive Id field to do this.



Edit remote site [Close]

Name: SharePoint - SPTest1 - Library 1

Type: Microsoft OneDrive / Sharepoint

Region: Microsoft Cloud Global

Authorisation succeeded

Config type: Search for a Sharepoint site

Search string: * [Search]

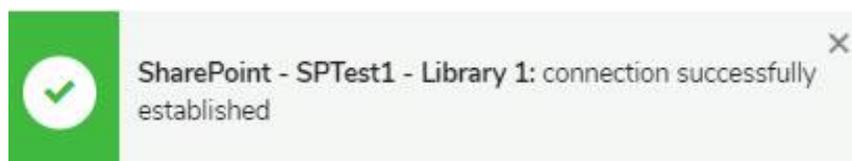
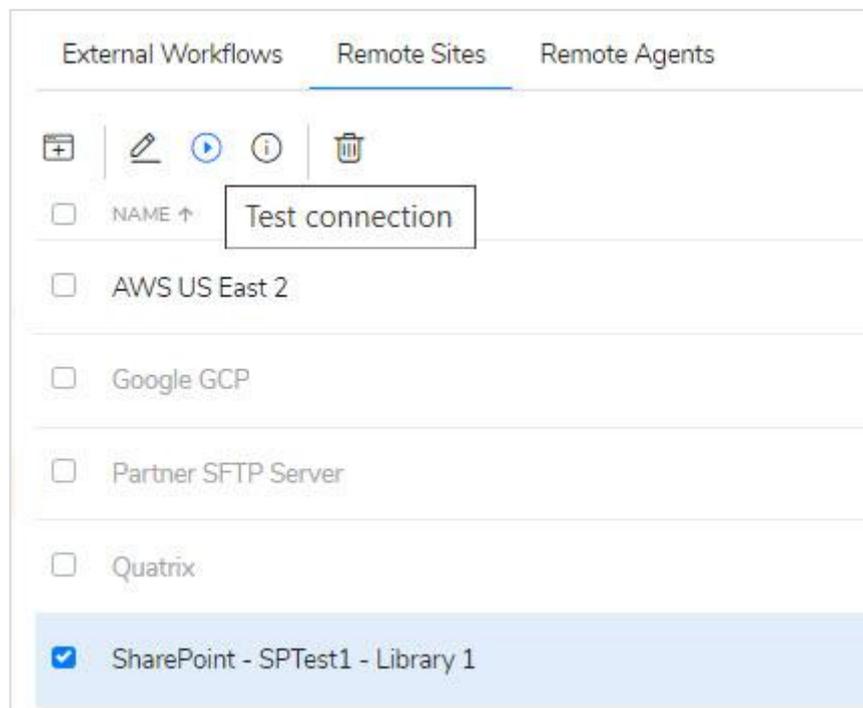
Site URL: SPTest1 .sharepoint.com/sites/SPTest)

Drive Id: Library 1 (selected), Library 2, Library 1, Documents

[Test connection] [Cancel] [Save]

If there are specific folders within a Sharepoint library you wish to transfer files to or from, you can configure this path when you create the “External Workflow”. See an example later in this article.

After saving the configuration you can use the “Test connection” option to validate the connection.



Now that you have created the “Remote Site” profiles for OneDrive or Sharepoint, you can create external Workflows to copy, move, or synchronize files between Quatrix and these repositories.

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Creating a SharePoint Workflow

SharePoint Example Workflow

Let's say that files are being deposited in a Sharepoint folder and we want to use Quatrix to pull the files from Sharepoint onto Quatrix storage. Maybe then we will combine another workflow and re-transfer to another target. In this sense Quatrix is a central broker providing an audit trail. We also want to leave the Sharepoint folder empty after a successful transfer. So in this example we will use the MOVE action.

SharePoint Note - ROOT SITE

SharePoint consists of different types of sites.

There is one site that is created out of the box once you create your Office 365 account, and that site is domainname.sharepoint.com. That site is called the Root Site. Essentially it is the site with the shortest URL (without /sites suffix). Root site is a must in each tenant and was created automatically for you when your organization acquired Office 365 account.

But as we have seen when setting up the Remote Site connection, Quatrix allows you to connect to specific SharePoint sites and libraries. And to transfer files to or from specific SharePoint folders within a library, you define the path within a Workflow as shown in the following steps.

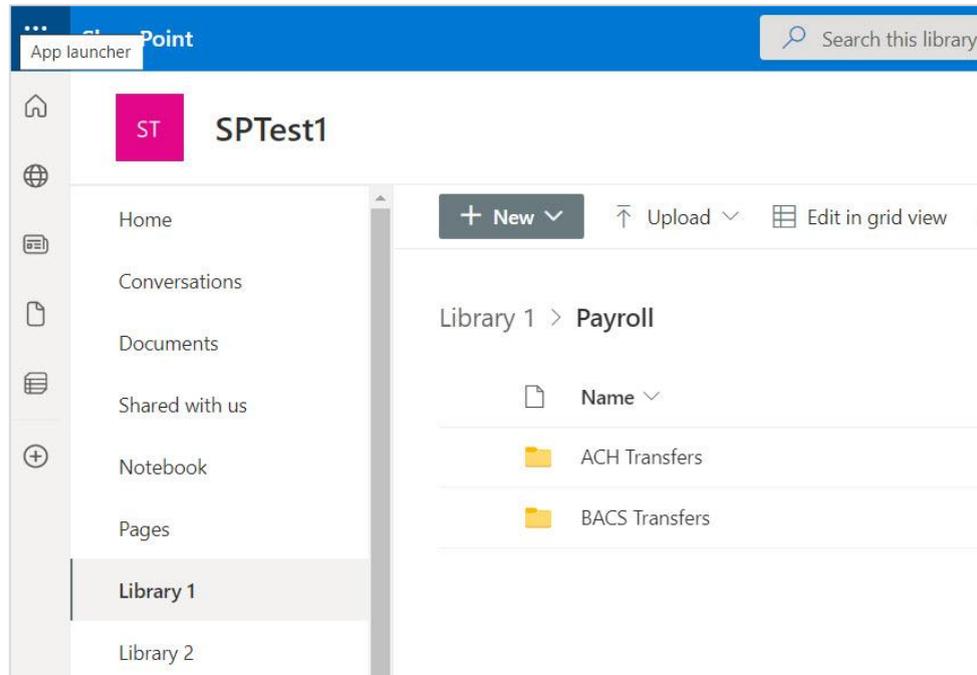
For this example we will use a connection to a Sharepoint site labeled SPTest1. Specifically we want to transfer files from a folder labeled "Payroll". In this case there are subfolders within the Payroll folder that contain files we want to transfer as well.

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Looking at the example SPTest1 site from the Microsoft Admin Center console, we see



On the Quatrix side, you will need to determine a folder where the files will be transferred into. If none yet created for this task, use File Explorer, and create the desired folder. In this example flow, a folder has been created and named “Payroll Inbound”. This will be what we enter in the destination field as we create the workflow.

To create the actual workflow, navigate to the “External Workflows” menu in Quatrix. Click on the “Add Automation” icon

Note - Coming up with a naming convention for your workflows is very important. This will help with general organising and sorting in the future.

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In this example we use a previously created “Remote Site” connection to the Sharepoint SPTTest1 site and specifically to Library 1.

External Workflows		Remote Sites	Remote Agents	
				
<input type="checkbox"/>	NAME ↓			TYPE
<input checked="" type="checkbox"/>	SharePoint - SPTTest1 - Library 1			Microsoft OneDrive / Sharepoint

Previously established Remote Sites are automatically listed under the select source field dropdown menu.

Add automation

Automation name
Payroll - SharePoint Inbound

Workflow
Move files

Select source
Current account
SharePoint - SPTTest1 - Library 1 (Site)
AWS US East 2 (Site)
SAP Agent OnP (Agent)

Include specific files that match certain patterns

Delete empty source folders ⓘ

Filter by age

Filter by size

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Because we have a specific folder called “Payroll” that exists within Library 1 on our SharePoint site, we’ll need to enter the folder name “Payroll” in the remote folder path field



The screenshot shows a configuration window with two main sections. The first section is titled "Select source" and contains a dropdown menu with the selected option "SharePoint - SPTest1 - Library 1 (Site)". The second section is titled "Type remote folder path" and contains a text input field with the value "Payroll".

For destination we select current account and use the browse select button to choose the appropriate folder we expect files to be transferred to.



The screenshot shows a configuration window with three main sections. The first section is titled "Select destination" and contains a dropdown menu with the selected option "Current account". The second section is titled "Choose folder" and contains a "Select" button followed by the text "/Payroll Inbound". The third section contains a checked checkbox with the label "Keep source folder structure including empty folders".

Send notification on failure only

Run automatically on the specified schedule

Schedule (At 0 minutes past the hour, every 12 hours) ⓘ

Minutes **Hourly** Daily Weekly Monthly

Every hour(s) on minute

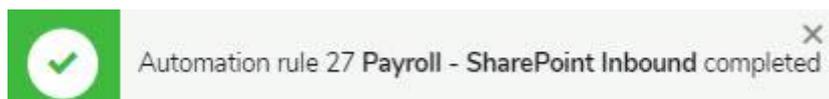
Start date
 ⓘ

Notes

Activate

Once the fields are completed and you have defined the schedule when you want the workflow to run, you can run the rule manually to test if desired. Running a rule manually is an option and via the API you can also invoke a workflow.

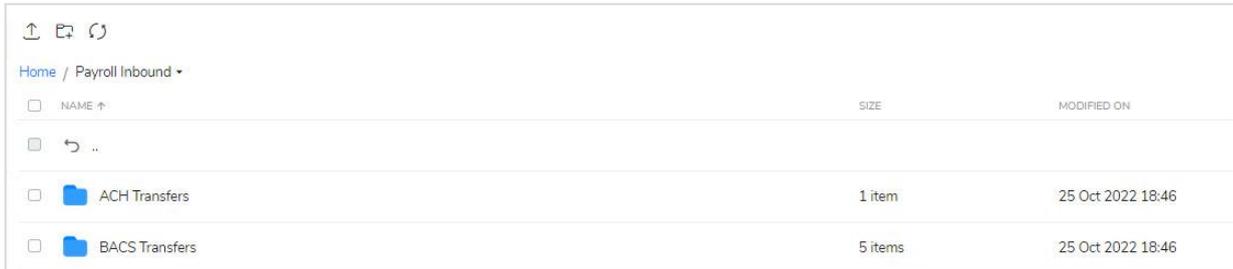
External Workflows		Remote Sites	Remote Agents
<div style="display: flex; justify-content: space-between; align-items: center;"> 🔗 ✎ ▶ 🗑 </div> <div style="display: flex; align-items: center; margin-top: 5px;"> <input type="checkbox"/> NO. ↓ <div style="margin-left: 20px; border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px;">Run now</div> </div>			
	NO. ↓	SOURCE	DESTINATION
<input checked="" type="checkbox"/>	27	Payroll - SharePoint Inbound	SharePoint - SPTest1 - Library 1 (Site) → Current account



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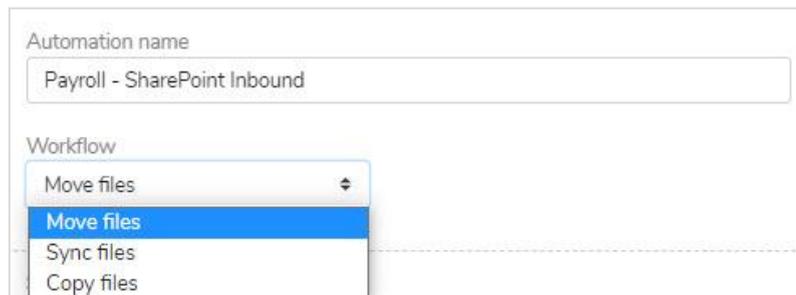
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Checking the destination folder on Quatrix we see the subfolders and files have been successfully pulled from the Sharepoint source.

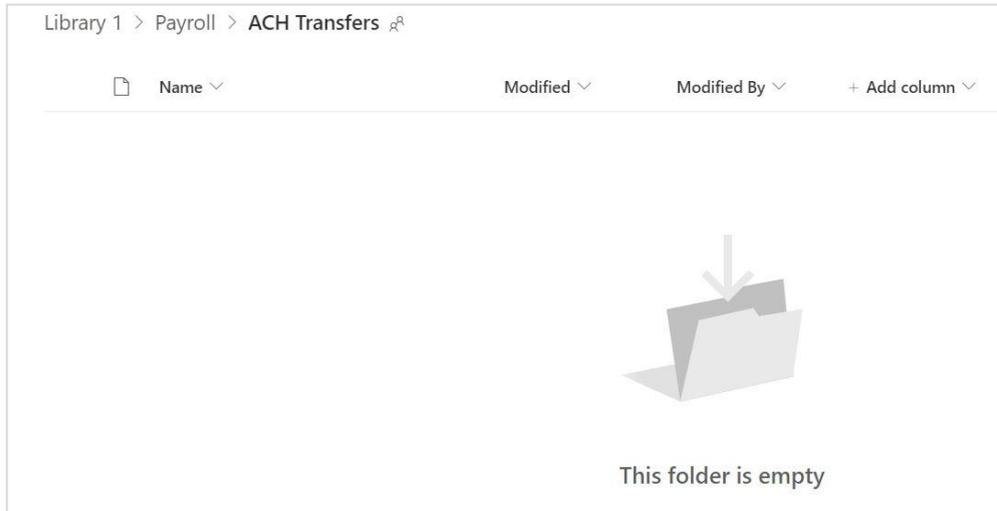


NAME	SIZE	MODIFIED ON
...		
ACH Transfers	1 item	25 Oct 2022 18:46
BACS Transfers	5 items	25 Oct 2022 18:46

In this example our intent was to leave the Sharepoint folder empty after successful transfer. The “Move” action was used to achieve this.



Checking the Sharepoint site we see the source folders are empty as expected.



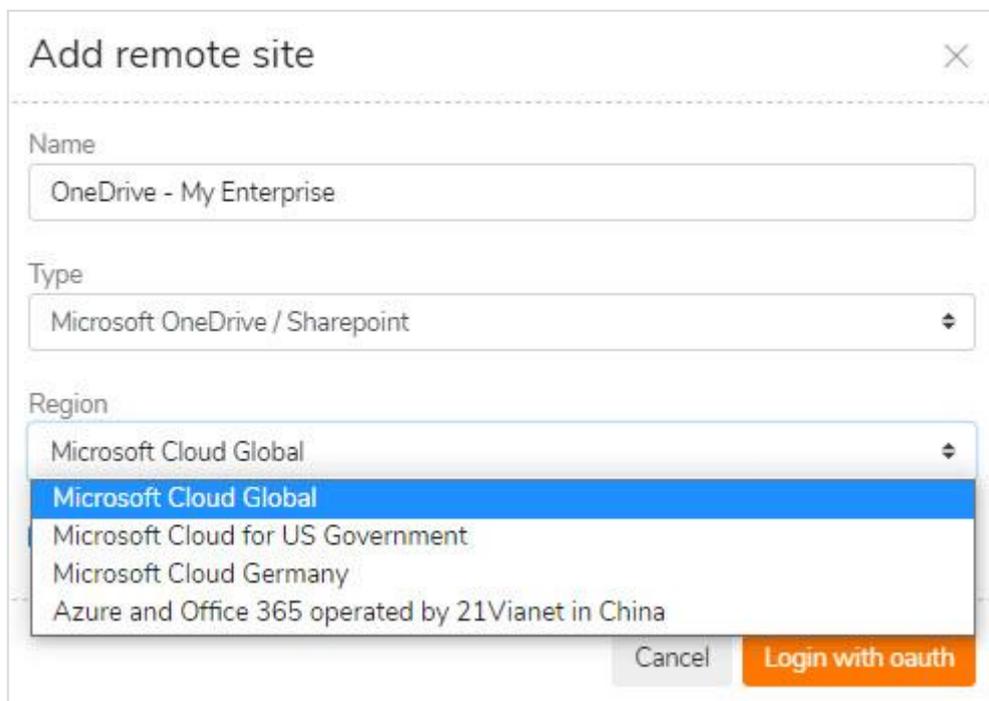
For more information about Workflows and Remote Sites, [visit our Help Centre](#).

OneDrive Remote Site Creation

To set up a OneDrive workflow in Quatrix, first create the remote site connection.

Best practice is to name the “Remote Site” so it’s easily identifiable as to the connection type.

Similar to establishing a SharePoint connection, choose “Microsoft OneDrive / Sharepoint” as the type and choose the appropriate region.



Add remote site [Close]

Name
OneDrive - My Enterprise

Type
Microsoft OneDrive / Sharepoint

Region
Microsoft Cloud Global
Microsoft Cloud Global
Microsoft Cloud for US Government
Microsoft Cloud Germany
Azure and Office 365 operated by 21Vianet in China

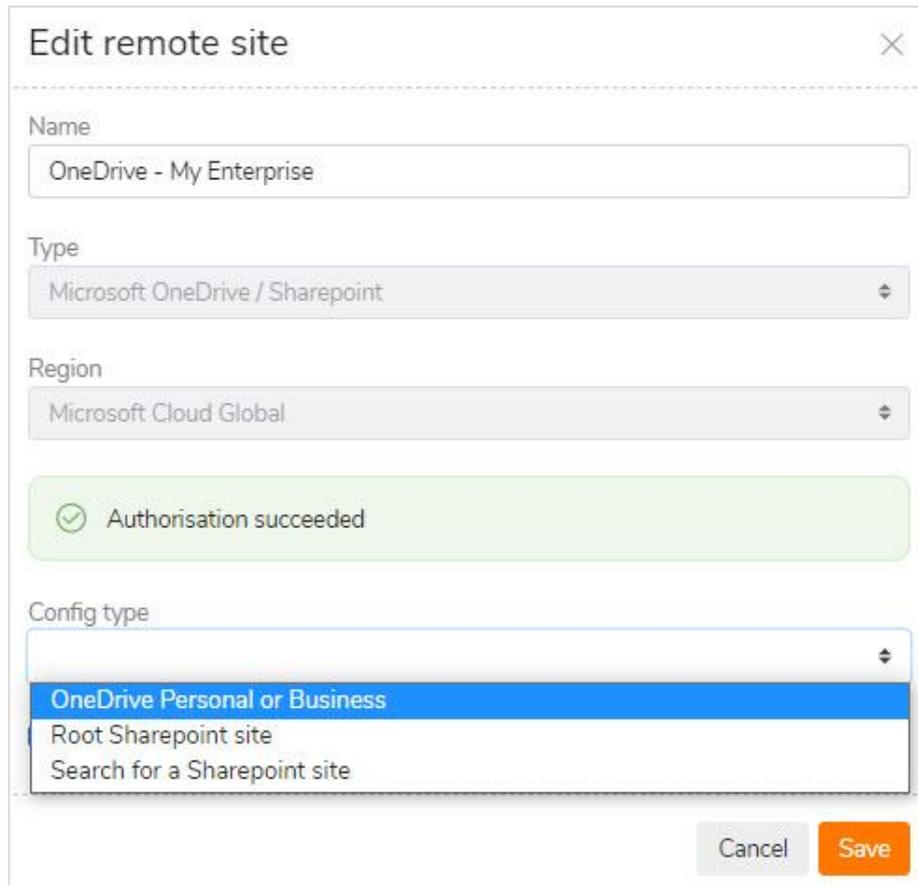
Cancel Login with oauth

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After logging in with Oauth, you should get an authorization succeeded message if successful. Now choose OneDrive Personal or Business as the config type.



Save the configuration. Test and validate the connection.

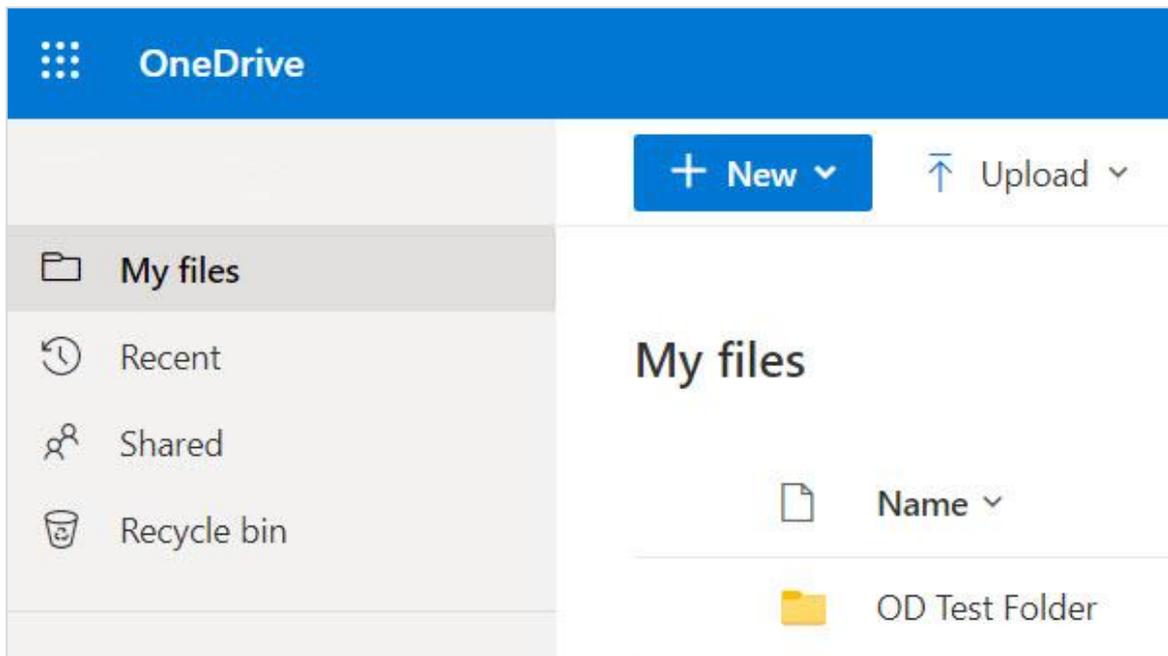


OneDrive Example Workflow

Let's say that files are being deposited in a OneDrive folder that need to be automatically transferred to Quatrix. And we want to leave the OneDrive folder empty after a successful transfer. So, in this example we will use the MOVE action.

On the Quatrix side, you will need to determine a folder where the files will be transferred into. If none yet created for this task, use File Explorer, and create the desired folder.

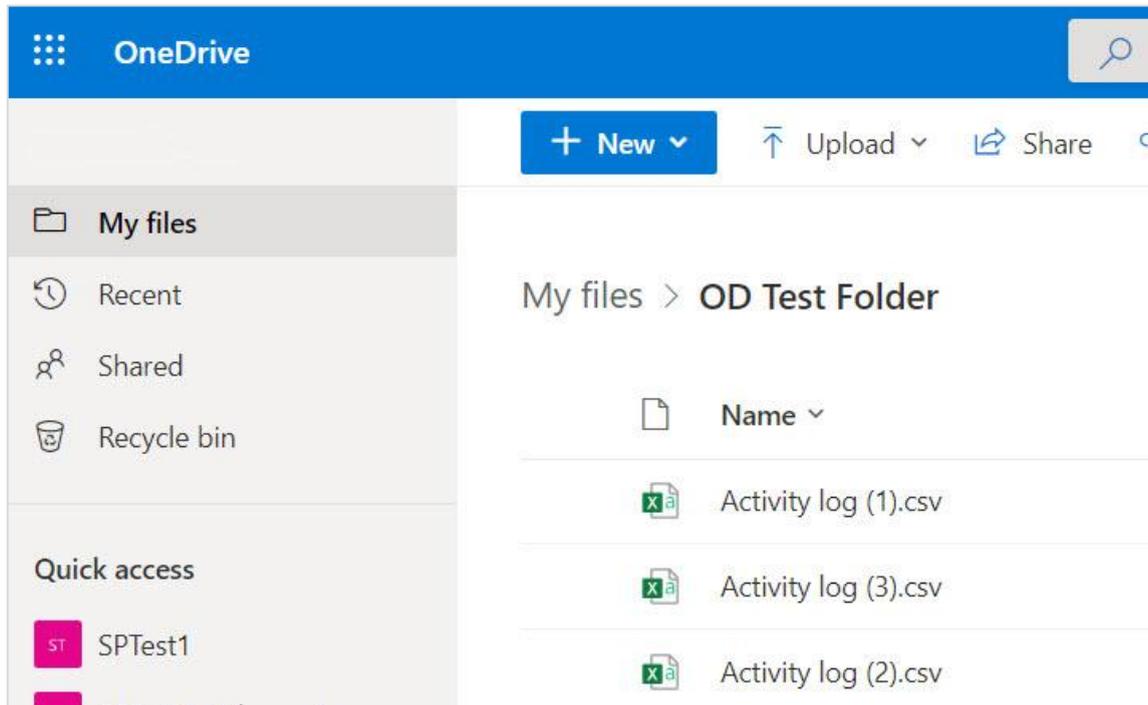
We look at the OneDrive side of things and will be using a folder named "OD Test Folder". We see some csv files in the folder.



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The source remote folder path is entered as OD Test Folder.

Once the fields are completed you can choose to run the rule manually (best practice to test) or wait until the scheduler you defined initiates the transfer.

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Add automation ✕

Automation name

Workflow

Select source

Type remote folder path

Include specific files that match certain patterns

Delete empty source folders ⓘ

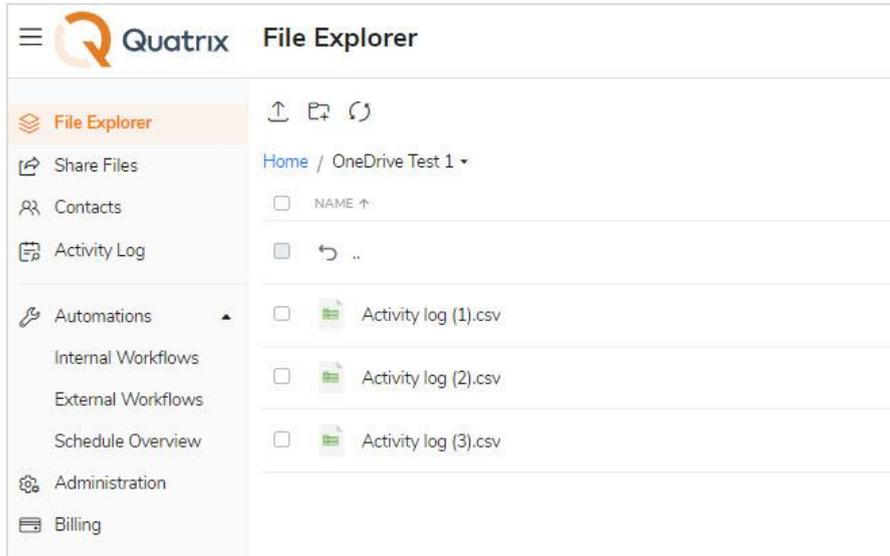
Filter by age

Filter by size

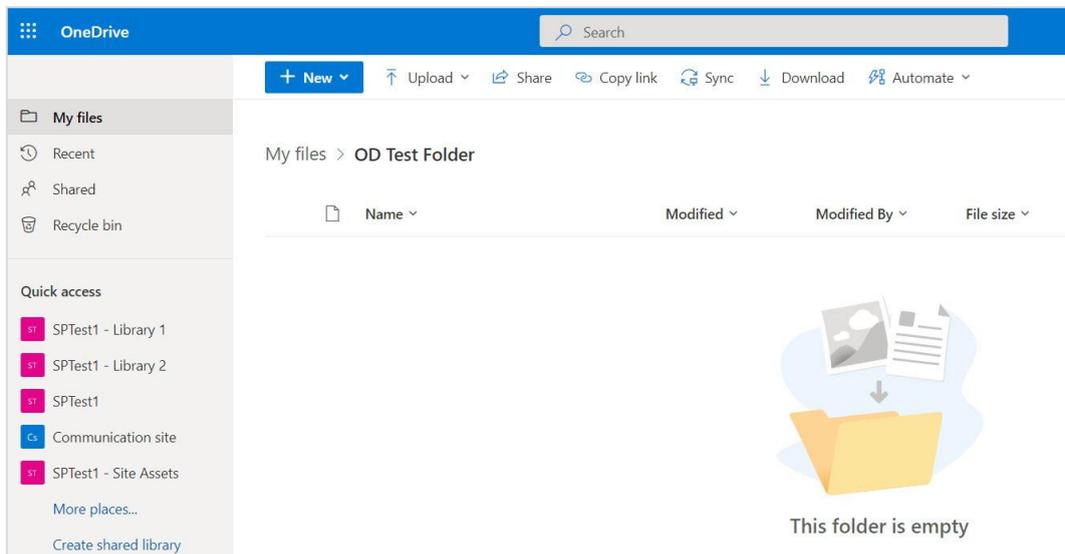
Select destination

Choose folder
 /OneDrive Test 1

After running the workflow, we see a successful transfer of files into the destination folder.



And we see the OneDrive folder is now empty which is what was expected.



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