Flo-10.

SharePoint Integration Data Sheet

20 May 2023

Summary

This document covers the key details of the integration between SharePoint and Flo10. Data flow is bi-directional, Live Folder / Documents from SharePoint can be linked to from Flo10, and Folders / Documents added to Flo10 can be created in SharePoint.

Integration

User Accounts and Roles

Flo10 can create Microsoft Teams based on project staff linked to the SharePoint folders. All users must have accounts in both Flo10 and Microsoft.

Please note that Flo10 will not inherit any user roles (such as admin rights) from SharePoint. Rights specific to Flo10 are allocated in the Flo10 admin pages.
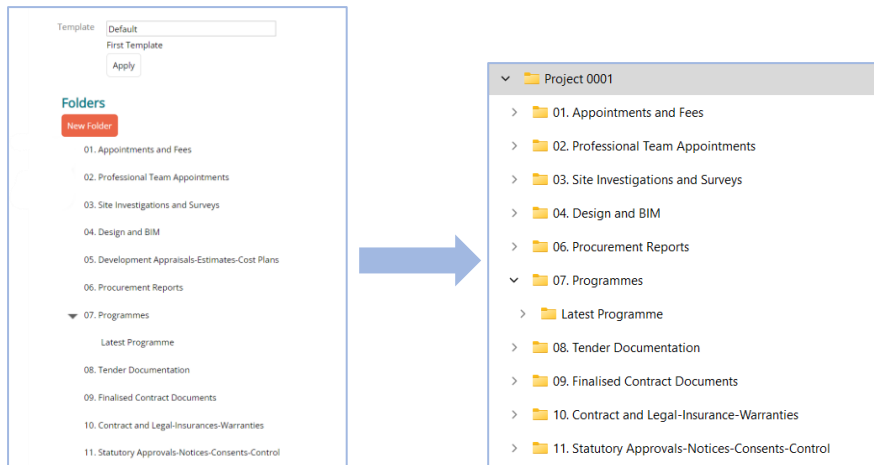
Access Permissions

Flo10 would require to be added as an App in your Microsoft Azure Tenant. We expect users to sign in using Microsoft Authentication (OAuth).

Data Flow

Data will consist of live links. Flo10 will read and display data directly from SharePoint.

SharePoint Project Folders

Flo10 can create consistent SharePoint folders for all your projects. Project Folder templates can be created and managed within Flo10 and automatically generated in SharePoint from the Project Tracker.

Access SharePoint Folders / Documents

Flo10 can display the contents of Key Folders and link directly to the Project documents. These can be displayed on the Project Landing page to give the user quick access to Project documentation.

For example, each project may have a panel displaying the documents in the BIM folder for that project.

Tracker Task Documents

SharePoint documents can be linked to individual Tracker Tasks. This is a live link and therefore will be accessible throughout the Project / Documents lifecycle.

Documents manually uploaded to a Tracker Task can be automatically filed in the SharePoint Project folder associated with the type of task.

Please note, that links are live, therefore, if a document or folder is moved or deleted, then they will no longer be accessible via the link held within Flo10. This also applies to access permissions. You will only be able to successfully open a SharePoint Document from Flo10 if you have the required access within SharePoint.