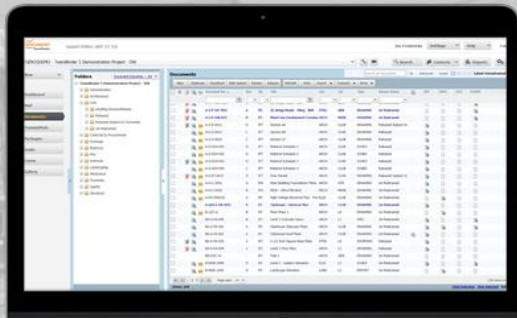


INEIGHT DOCUMENT

SharePoint Integration



InEight[®]
DOCUMENT
POWERED BY TeamBinder

Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

Rev	Date	Description
1.0	09/05/2024	First Draft - middleware
2.0	23/10/2025	Second Revision – integration in product

Contents

1	Introduction	4
2	SharePoint Data Transfer	4
2.1	Service Account.....	4
2.1.1	Creating the Service Account.....	4
3	SharePoint Account Information	5
3.1.1	SharePoint Details.....	5
3.2	SharePoint Site, List, Folder	6
3.3	Transfer Direction	7
3.3.1	Document to SharePoint.....	7
3.3.2	SharePoint to Document.....	7
3.4	Mapping the Workbook Fields.....	7
3.4.1	Mapping Types.....	8
3.5	Document filter / SharePoint filter	9
3.5.1	Numeric and String Type Fields	9
3.5.2	DateTime Fields.....	9
3.5.3	No Filter.....	10
3.6	Document Register View.....	10
3.7	Notify Email.....	10
3.8	Transfer Modified	11

1 Introduction

InEight Document provides a two-way synchronization with documents managed in Microsoft SharePoint. SharePoint Integration allows seamless transfer of documents between InEight Document and MS SharePoint. You can map specific document attributes between the solutions. Filter criteria can be defined to choose the files to transfer.

Notes:

- SharePoint Integration is currently supported only for the Document Register and is not available for other modules.
- Only documents that meet the configured filter criteria and have been uploaded within the past hour are transferred. Existing documents are not included in the transfer.
- Document transfers are triggered by changes such as creating a new revision, updating the status, or generating a new version. Actions like editing document details or replacing/removing view files are not supported.

2 SharePoint Data Transfer

2.1 Service Account

It is recommended that a service account be created for the integration account by the primary administrator on the project. Contact your project delivery consultant if this option is not available.

Note: Only the primary administrator can enable the option for service accounts. Once enabled, this account is only visible to the primary administrator.

2.1.1 Creating the Service Account

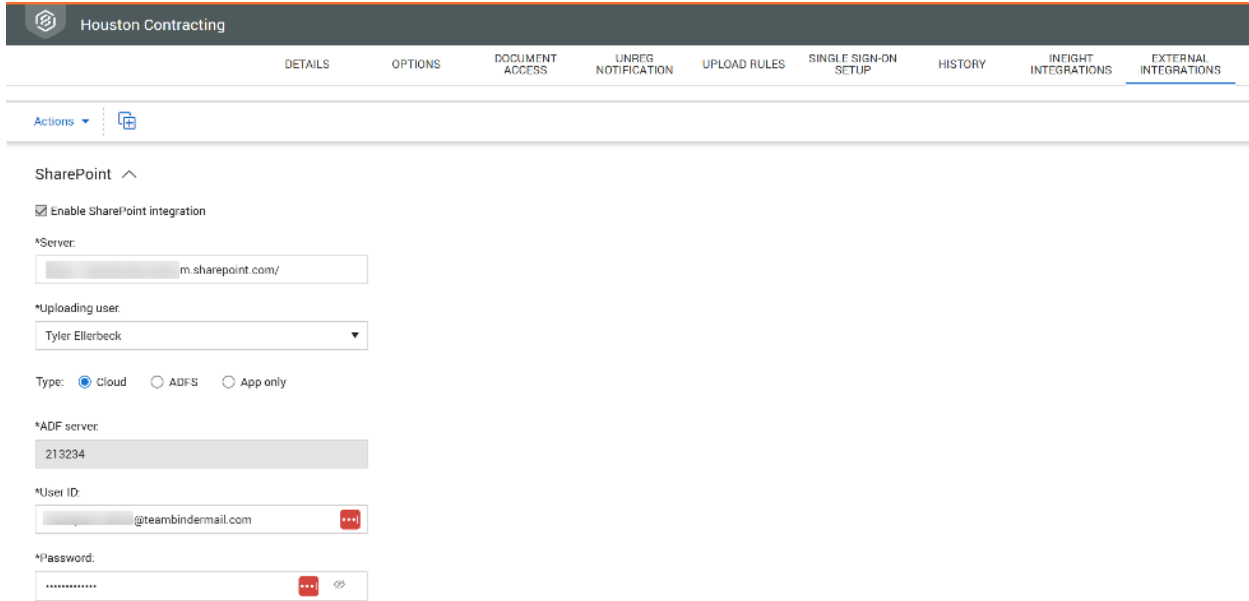
Only the primary administrator can create the service account/s under the customer's company. The service account should be named specifically for the SharePoint integration activity, for eg SP Integration. This account will then need to be given the relevant access.

Scroll down to the bottom of the contact record and select **Service account**, select any other options that are applicable.

- ☐ Make contact inactive
- ☐ Include inactive contact in filters
- ☐ Make contact restricted
- ☒ Service account (Visible only to the Primary Administrator)
- ☐ Disable password update when logging into API
- ☐ Disable 2FA when logging into API
- ☐ API only

3 SharePoint Account Information

The following information will need to be populated in the **External Integrations** tab. This can be provided by your SharePoint administrator.



3.1.1 SharePoint Details

- Enable SharePoint Integration
- **Server** – Enter your SharePoint server details
- **Uploading user** – Enter the Service Account details
- **Type** (screen options change according to what ‘type’ is chosen:
 - **Cloud** - Cloud-based is exactly as described and uses normal log-in. Use this setting if the SharePoint site resides in the Cloud and provide the following login information:
 - User ID
 - Password
 - **ADFS** - ADFS configuration can be in the cloud but may be authenticated from Active Directory Federation Services. You will need to provide the following login information:
- ADFS Server address
 - User ID
 - Password
- **App Only** - App Only is used when Two Factor Authentication has been enabled on the SharePoint site. You will need to provide the following information:
 - Tenant ID
 - Customer ID
 - Customer Secret

A copy of the **App-Only Set-up Guide** can be provided by your project delivery consultant.

DOCUMENT TO
SHAREPOINT

← → ↺ https://teambindermail.com.sharepoint.com/sites/DocumentIntegration/Uploaded%20from%20Doc/Forms/AllItems.aspx

SharePoint Server SharePoint site Search this library

DocumentIntegration

Private group

- Home
- Conversations
- Documents
- Notebook
- Pages
- TRAINING501-DOC2SP**
- TRAINING501-SP2DOC

TRAINING501-DOC2SP SharePoint Library

	Modified	Name	DocumentNo
FromDOC	February 17, 2023	FromDOC	
	March 17, 2023	SEPA-TEST	
	February 17, 2023	ToDOC	

SharePoint folder

- **SharePoint site** - SharePoint site to/from which the documents are to be transferred. On the screenshot above, SharePoint site is for eg: **/sites/DocumentIntegration/**
- **SharePoint list** – SharePoint list to/from which the documents are to be transferred. On the screenshot above, SharePoint list is for eg: **TRAINING501-DOC2SP**
Note: Create a **SharePoint Library** instead of a SharePoint list, as it is no longer supported. The SharePoint Library has this  icon.
- There should be a separate SharePoint Library for each direction.
- **SharePoint folder** - SharePoint folder to/from which the documents are to be transferred. Leave it empty if there are no folders. If a subfolder is used, include it by adding “/” before the subfolder name (e.g. Folder1/Folder2). On the screenshot above, SharePoint folder is: **FromDOC**

Field mapping

DOCUMENT TO SHAREPOINT		SHAREPOINT TO DOCUMENT				
☐	Document register view	*SharePoint site	*SharePoint document library	SharePoint folder	Notify email	Document filter
☐	Latest unrestrained ▼	/sites/DocumentIntegrationUS/	Documents		① @ineight.com	
☐	Latest unrestrained ▼	/sites/DocumentIntegrationUS/	Documents	Folder1/Folder2	② @ineight.com	

3.3 Transfer Direction

3.3.1 Document to SharePoint

Use the '**DOCUMENT TO SHAREPOINT**' tab to set up the transfer from InEight Document to the SharePoint site.

DOCUMENT TO SHAREPOINT
SHAREPOINT TO DOCUMENT

☐	Document register view	*SharePoint site	*SharePoint list	*SharePoint folder	Notify email	Document filter
☐	All	123	123	123	123	123

Access requirements when transferring documents from InEight Document to SharePoint:

- **InEight Document** – account should have at least 'view' access to the Document module.
- **SharePoint** – account should have 'edit' permission in the SharePoint site

3.3.2 SharePoint to Document

Use the '**SHAREPOINT TO DOCUMENT**' tab to set up the transfer from the SharePoint site to InEight Document. Note that all mandatory fields in the InEight Document upload screen should be added to the metadata mapping for the transfer to be successful.

DOCUMENT TO SHAREPOINT
SHAREPOINT TO DOCUMENT

☐	*SharePoint site	*SharePoint list
☐	/sites/DocumentIntegrationUS/	E2E

Access requirements when transferring documents from SharePoint to InEight Document:

- **InEight Document** – account should have 'full' access to the Document module and be part of an Upload Rule
- **SharePoint** – account should have at least 'view' access to the SharePoint site.

3.4 Mapping the Workbook Fields

The next step in the process is to enter and map the relevant fields via the **Mapping** column.

DOCUMENT TO SHAREPOINT
SHAREPOINT TO DOCUMENT

point folder	SharePoint filter	Transfer modified	Notify email	Mapping
		No	tyler.ellerbeck@ineight.com	

3.4.1 Mapping Types

Mapping ×

+

×

☐	Mapping type	Sharepoint field	Doc field	Doc value	Mapping
☐	Direct	Document No.	Document No		
☐	Direct	Discipline	Document Discipline		
☐	Fixed		Document Area	Garage	
☐	Translate	Type	Document Type		

Value Mapping ×

Select a source value to map the target value

+

×

☐	Source value	Target value
☐	DWG	Drawing
☐	Spec	Specification

There are four ways to map the metadata:

- **Direct** – when this option is selected, the field value from InEight Document is populated in SharePoint.
- **Translate** – when this option is selected, a further dropdown list is visible, allowing the addition of a metadata code in the Doc Value field and the full title in the SharePoint value field. This is applicable when the field values between InEight Document and SharePoint are not identical. E.g. The InEight Document field value is 'ARCH', whereas in SharePoint the field value is 'Architectural'.
- **Fixed** – when this option is selected, the SharePoint field and SharePoint value are cleared, to allow fixed values to be entered, which will be transferred. E.g. SharePoint has a mandatory 'Special Instruction' field. As the field doesn't exist in InEight Document, a fixed value 'SharePoint Transfer' can be defined, which will be automatically populated in the 'Special Instruction' field.
- **Reverse** – this can be used for the Document No. field when auto-numbering is being used. This option will update the Document No. in SharePoint. When Reverse is used, make sure that the account has 'edit' permission to update.

Once the data has been mapped and saved, validation will occur to make sure entries are correct.

3.5 Document filter / SharePoint filter

To apply filter conditions for transferring documents to/from InEight Document using SharePoint, they need to be defined in Collaborative Application Markup Language (CAML) format via

Document/SharePoint filter column. Refer to <https://msdn.microsoft.com/en-us/library/office/ms467521.aspx> for detailed syntax.

DOCUMENT TO SHAREPOINT		SHAREPOINT TO DOCUMENT	
+		-	
Point list	*SharePoint folder	Notify email	Document filter
	123	123	'fDocFilter3': [{('Field': 'FieldName';Co
			Mapping

3.5.1 Numeric and String Type Fields

Filter3 can be used for any numeric and string type fields.

'fDocFilter3': [{('Field': '**FieldName**', 'Condition': 'EQUAL', 'Value': "**FieldValue**")}]

Example: Filter below applies to all documents with 'Discipline' = ARCH.

'fDocFilter3': [{('Field': 'Discipline', 'Condition': 'EQUAL', 'Value': ARCH)}]

3.5.2 DateTime Fields

Filter4 can be used for DateTime fields. For Filter4, two values are required, even if the second value is empty. Also, if only a date value is required, provide it in YYYY-MM-DD format and if a DateTime value is required, provide it in YYYY-MM-DDTHH:MM:SS format.

'fDocFilter4': [{('Field': '**DateTimeFieldName**', 'Condition': 'BETWEEN', 'Value1': '**FieldValue1**', 'Value2': '**FieldValue2**'})}]

Example: Filter below applies to all documents where 'IssuedDate' is between 1st January to 31 January 2024.

'fDocFilter4': [{('Field': 'IssuedDate', 'Condition': 'BETWEEN', 'Value1': '2024-01-01', 'Value2': '2024-01-31')}]

3.5.3 No Filter

If no filter is required, it can be defined as follows:

'fDocFilter3': [{}]

List of Filter Conditions:

- EQUAL
- AFTER
- BEFORE
- BEGINWITH
- ENDSWITH
- BETWEEN
- GREATEREQUAL
- GREATERTHAN
- IN
- LESSEQUAL
- LESSTHAN
- NOTBEGINWITH
- NOTENDSWITH
- NOTBETWEEN
- NOTEQUAL
- NOTIN
- NOTLIKE
- NOTNULL
- NOTON
- ON
- ONORAFTER
- ONORBEFORE

3.6 Document Register View

The **Document register view** enables you to choose the list of documents available for transfer. This view aligns with the register view options when logged into InEight Document. It is recommended to select the “**Latest Unrestrained**” view to ensure the most current and unrestricted documents are included.

DOCUMENT TO SHAREPOINT
SHAREPOINT TO DOCUMENT

+
x

☐	Document register view	*SharePoint site	*SharePoint list
☐	All	123	123

All
Latest unrestrained
Latest
All superseded revisions
Awaiting vendor transmittals

3.7 Notify Email

Specify the email address where the notification email will be sent following the transfer. These will be received every hour as per standard sync.

DOCUMENT TO SHAREPOINT
SHAREPOINT TO DOCUMENT

+
x

*SharePoint list	*SharePoint folder	Notify email	Document filter
TRAINING501-DOC2SP	FromDOC	first.last@ineight.com	'fDocFilter3': [{Field: 'FieldName';Co

InEight Document - SharePoint Integration

Here’s an example of a notification email.

Notification - InEight Document - SharePoint Transfer Log for Project: PRODTEAM at 2026-02-05 17:20:44

S

system@teambinder.com

To:

☺

↩ Reply

↩ Reply all

➡ Forward

📎

🔗

📅

⋮

Thu 2/5/2026 11:20 AM

Block sender

⚠ This sender system@teambinder.com is from outside your organization.

Upload Result:

us.teambinder.com - File INEIGHT-DRAWING-0012.pdf has been uploaded to SharePoint <https://teambindermailcom.sharepoint.com/sites/DocumentIntegrationUS/Documents>.

us.teambinder.com - File INEIGHT-DRAWING-0013.pdf has been uploaded to SharePoint <https://teambindermailcom.sharepoint.com/sites/DocumentIntegrationUS/Documents>.

us.teambinder.com - File INEIGHT-DRAWING-0014.pdf has been uploaded to SharePoint <https://teambindermailcom.sharepoint.com/sites/DocumentIntegrationUS/Documents>.

us.teambinder.com - File INEIGHT-DRAWING-0015.pdf has been uploaded to SharePoint <https://teambindermailcom.sharepoint.com/sites/DocumentIntegrationUS/Documents>.

us.teambinder.com - File INEIGHT-DRAWING-0016.pdf has been uploaded to SharePoint <https://teambindermailcom.sharepoint.com/sites/DocumentIntegrationUS/Documents>.

us.teambinder.com - File INEIGHT-DRAWING-0017.pdf has been uploaded to SharePoint <https://teambindermailcom.sharepoint.com/sites/DocumentIntegrationUS/Documents>.

Validation Result:

↩ Reply

↩ Reply all

➡ Forward

3.8 Transfer Modified

It is recommended to set this field to **Yes** as it is useful when e.g. title is updated, with no other changes being made to rev and status. It will not create a new document/file but will just update the title/metadata.

DOCUMENT TO SHAREPOINT

SHAREPOINT TO DOCUMENT

+

×

Point folder	SharePoint filter	Transfer modified	Notify email	Mapping
		No Yes No	tyler.ellerbeck@ineight.com	