

# Content Manager

Software Version 23.4

Zero Foot Print integration

**opentext™**

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# Introduction

The Content Manager Zero FootPrint (ZFP) Office integration document enables you to integrate Content Manager with Zero FootPrint (ZFP) Office applications, Teams, and Outlook.

## Components

The Zero Foot Print (ZFP) Office integration is made up of a number of components. You can configure the components depending on the level of functionality required. The components are:

- Service API
- Office 365 application manifests
- EmailLink

## Requirements

The components listed above work together to provide the complete Zero Foot Print integration. If you need only Outlook integration, then configure the Service API, EmailLink and Outlook manifest. The other components, Office manifest, is required for Word, Excel, and PowerPoint integration.

## Service API

The Service API must be installed and must have a valid HTTPS certificate, any HTTP errors will cause the Office integration to fail.

For more details on installing and configuring the Service API, see *Content Manager Service API* document.

The Service API performs three functions within the integration:

- hosts the web application that is embedded in Office as the add-in (at /CMServiceAPI/office/index.html),
- provides the backend services to which the add-on communicates when reading from or writing to Content Manager, and
- provides services that act as a proxy between the add-in and OneDrive for reading from and writing to OneDrive.

## Service API configuration

### Office integration configuration

The Service API must be provided with the GUID and the version found in the ID element of the Office add-in [manifest](zero\_manifests). This GUID is used when a document is first opened from Content Manager to notify the add-in that the Content Manager add-in should be auto-opened when the document is opened.

To add this GUID,

1. Edit the **hptrim.config** file.
2. Add the **officeIntegrationguid** element below the setup element

For example,

```
<setup databaseId="21" />  
<officeIntegrationguid="5d7bd8ba-11b0-99b9-98ab-99fadd99a99d" version="1.0.0.0"/>
```

## Service API authentication permissions

The Service API must be configured to use OpenID Connect authentication as described in the *Content Manager OpenID Connect authentication setup* document. The following new permissions must be assigned to the Azure AD application to support OneDrive access:

- Delegated:
  - Files.Read.All
  - Files.ReadWrite.All
- Application:
  - Files.Read.All
  - Files.ReadWrite.All
  - Office 365 Exchange Online - full\_access\_as\_app

To assign these permissions,

1. Open the Azure AD application used for authenticating the Web Client.
2. Go to **API permissions** and select **Add a permission**.
3. Select **Microsoft Graph**.
4. Choose either **Delegated** or **Application** permissions.
5. Find the permission and add it.
6. Once you have added all the permissions, select **Grant admin consent** to consent to all permissions.

**NOTE:** The Office 365 Exchange Online permission is not part of the OneDrive permissions, to find it, perform the following steps:

- a. Click **Add a permission** and then select **API's my organisation uses**.
- b. Find the **Office 365 Exchange Online** in the listed.
- c. Add the **Application** permission.

## Service API authentication application ID

The Office integration requires that the application ID URI in the Azure AD app include the domain name of your Service API server. This must be adjusted before installing the Office integration manifests.

To adjust the Application ID URI,

1. Open the Azure App referenced from your **ServiceAPI hptrim.config** file.
2. Go the **Expose an API** page.
3. Edit the **Application ID URI** field.

By default the Application ID URI will look something like `api://2d89cb2b-3cb7-4c21-807e-029fdbfe74a7`,

4. Edit the Application ID URI to include the name of your Service API server. For example `api://myserver.com/2d89cb2b-3cb7-4c21-807e-029fdbfe74a7`

5. Once you have modified the Application ID URI, you will need to update the **appldURI** property (case sensitive) in the **ServiceAPI hptrim.config** file.

## Service API authorized client applications

The ZFP Office integration relies on Single Sign On from the Microsoft add-in framework. To allow this to work, we need to register our add-in. This is done in the **Expose an API** section of the Azure App created previously.

To register your add-in,

1. Add a Scope.
2. Name it `access_as_user`
3. Fill in the fields with appropriate values. For example,
  - **Admin consent display name:** Office can act as the user.
  - **Admin consent description:** Enable Office to call the add-in's web APIs with the same rights as the current user.
  - **User consent display name:** Office can act as you.
  - **User consent description:** Enable Office to call the add-in's web APIs with the same rights that you have.
4. Save the scope.
5. Add six client applications, each time selecting the scope you just added, the Client ID for each of these are:
  - d3590ed6-52b3-4102-aeff-aad2292ab01c
  - 57fb890c-0dab-4253-a5e0-7188c88b2bb4
  - bc59ab01-8403-45c6-8796-ac3ef710b3e3
  - ea5a67f6-b6f3-4338-b240-c655ddc3cc8e
  - 93d53678-613d-4013-afc1-62e9e444a0a5
  - 08e18876-6177-487e-b8b5-cf950c1e598c

# Manifests

The manifest's purpose is to notify Office 365 of the presence of your add-in. Manifest files must be customised before upload to your Office 365 Admin.

To prepare your manifests,

1. Download the sample manifests ([office](#), [outlook](#)).
2. [Generate](#) a new Guid for each manifest (if you are installing both Outlook and Office integrations).

**NOTE:** If this is an upgrade, use the Guid of the originally installed manifest. Ensure the **Version** element contains a higher number than the original.

3. Replace [MANIFESTGUID] in each manifest with a valid Guid.
4. Set the GUID from the Office manifest in the **officeIntegration** element in the **hptrim.config** file (see above).
5. Assuming the Service API is in the pattern <https://yourserver.com/CMServiceAPI>, do a search and replace of each manifest, replacing [SERVICEAPIURL] with your URL.
6. Replace [DOMAIN] with your web server domain name.
7. In the **WebApplicationInfo** element of the manifest, replace [APPCLIENTID] with the Application ID from Azure and [APPIDURI] with the Application ID URI from Azure.  
  
The name of the add-in that will be displayed in the task pane title (and in the context menu for Outlook) is embedded in the manifest. By default, it is **Content Manager** but this can be changed, if desired.
8. Go to the [Add-ins page](#) in Office 365 Admin and deploy each manifest.

**NOTE:** The setup script used for the Microsoft Teams integration also generates manifests for Office, this may be simpler than following the manual steps above. For details, see *Content Manager Microsoft Teams Integration* document.

## Browser Cookies

It may be that the Office add-in does not display after it has been uploaded. To resolve this, ensure that all cookie blocking is disabled in the web browser.



## EmailLink

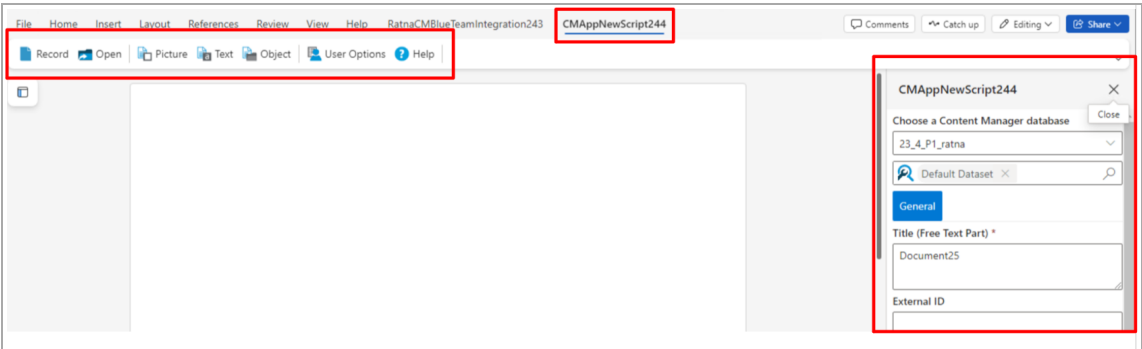
EmailLink serves two purposes in the Outlook/Office integration:

1. File email from Linked Folders in the Outlook integration, and
2. Check documents in from Office applications when **Check In on close** is selected.

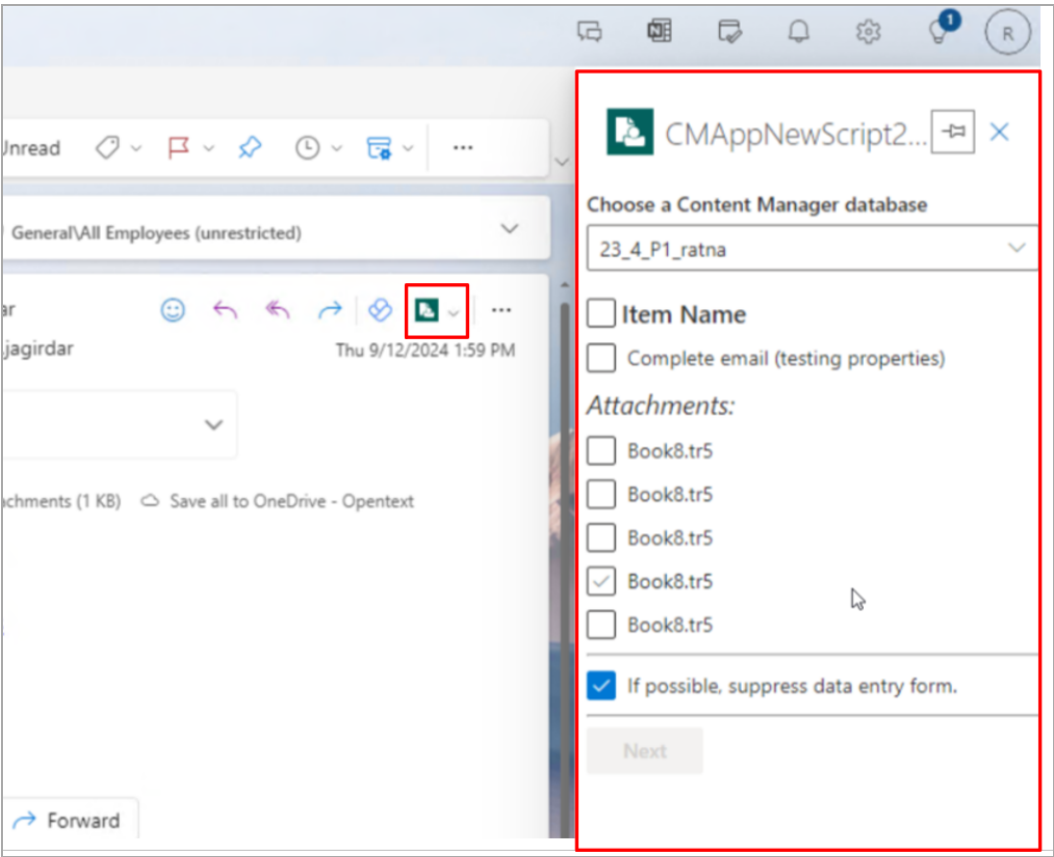
EmailLink should be installed and there must be a Microsoft authentication configuration for your Office 365 domain that is of type OAuth and has both Email and Drive selected (if both Office and Outlook integration is required).

# Content Manager menu

After the successful configuration, when you open Office or Outlook application, the Content Manager menu will be available on the menu bar.



Content Manager menu in Office



Content Manager menu in Outlook