

SharePoint file storage

The Certflow platform allows you to select whether you want to store your files within Certflow hosted storage, or SharePoint file storage.

Certflow advises users to use SharePoint file storage, as there are several benefits to your organisation that are not present when using standard Hosted Storage:

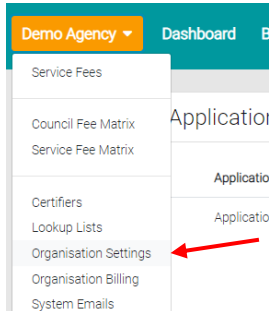
- Increase file storage space
- Automatically syncing files between the Certflow platform, and your local devices (phones, laptops, etc.) using the Microsoft OneDrive app
- Easy access and management of your files from anywhere with Microsoft SharePoint web services, in addition to the Certflow platform features
- Ability to open and edit documents directly through the Microsoft SharePoint only viewer, and Office online applications
- Quick-access shortcuts to organisation folders and files within the Certflow platform, linking directly to the resources in SharePoint

Follow the guides below to enable SharePoint file storage for your organisation and see how to access and use the additional features within the Certflow platform.

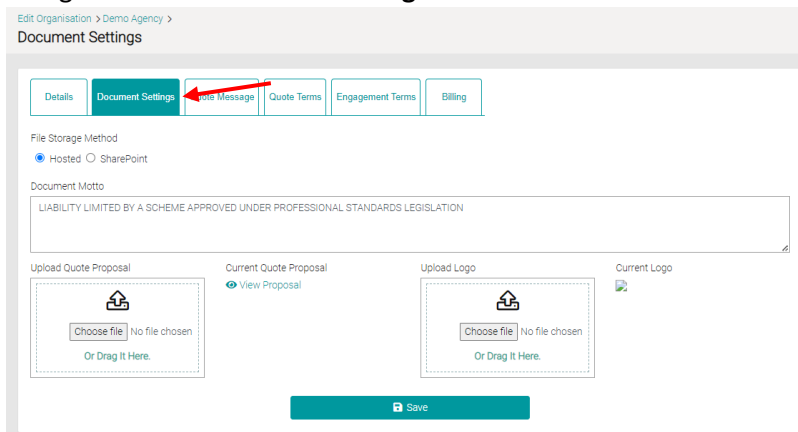
Enable SharePoint file storage

To use SharePoint file storage for your organisation, you must first enable and authenticate the connection.

1. Sign into the Certflow platform
2. Open your Organisation Settings, using the dropdown in the top left of the screen

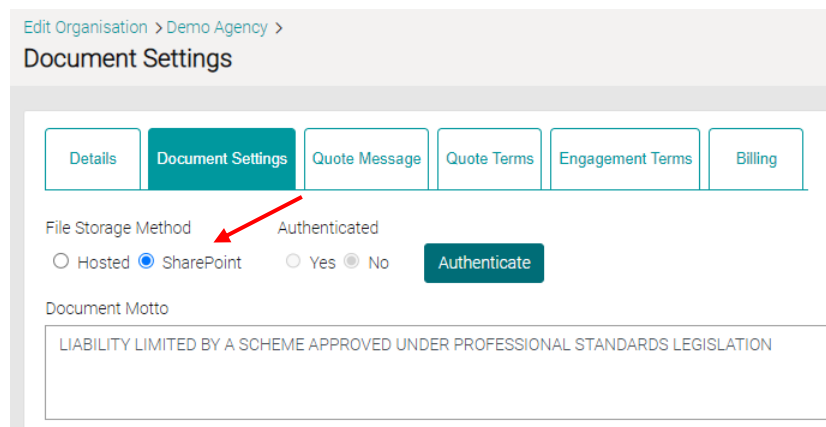


3. Navigate to the **Document Settings** tab



4. Change the **File Storage Method** option from **Hosted**, to **SharePoint**

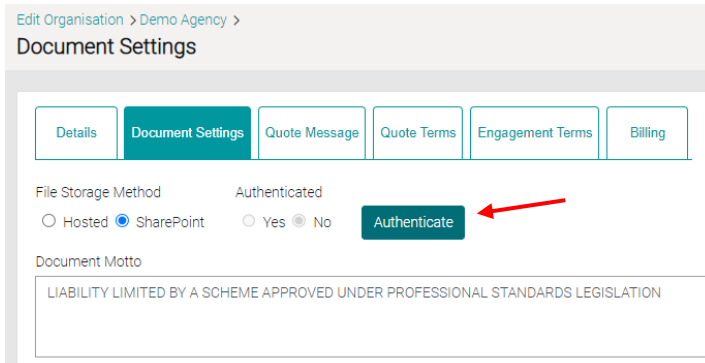
Once you have selected SharePoint as your organisation file storage method. You will see added fields that show whether the connection between Certflow and your SharePoint is currently authenticated. By default, the **No** option will be selected. See [Authenticating SharePoint](#) to authenticate your connection



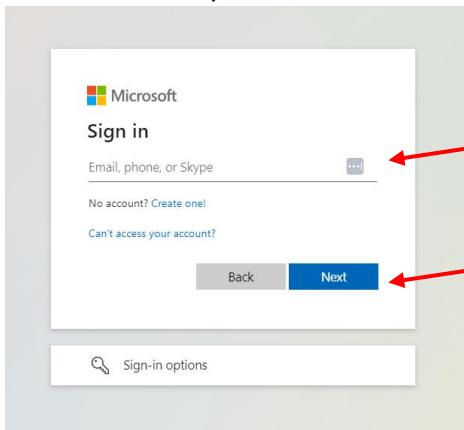
Authenticating SharePoint

For the Certflow platform to communicate with your SharePoint file storage, you must Authenticate the connection. Follow the steps below to authenticate your connection:

1. Click the **Authenticate** button in the Organisation document settings tab.



This will redirect you to the Microsoft sign in screen/process.



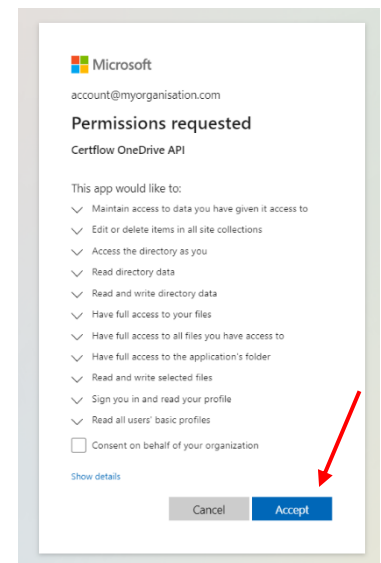
Note: This is an official Microsoft account sign in process. Certflow has no access to any of the information entered on this screen

2. Follow the prompts to sign into your Microsoft account

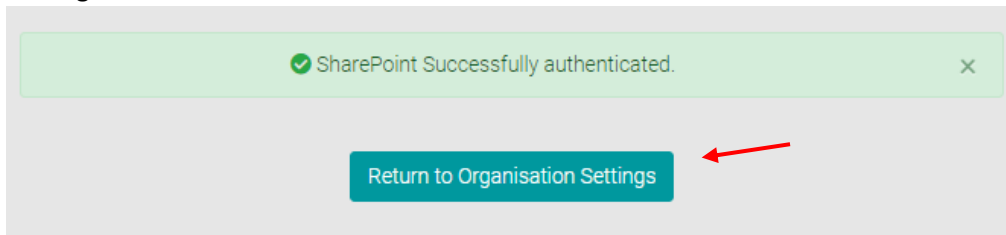
Note: This must be a Microsoft account linked to your Organisation SharePoint

3. Accept the permissions displayed on screen and grant the Certflow system access to your SharePoint storage. This is required for Certflow to read and write Survey Plans and Project documents to your SharePoint storage drive.

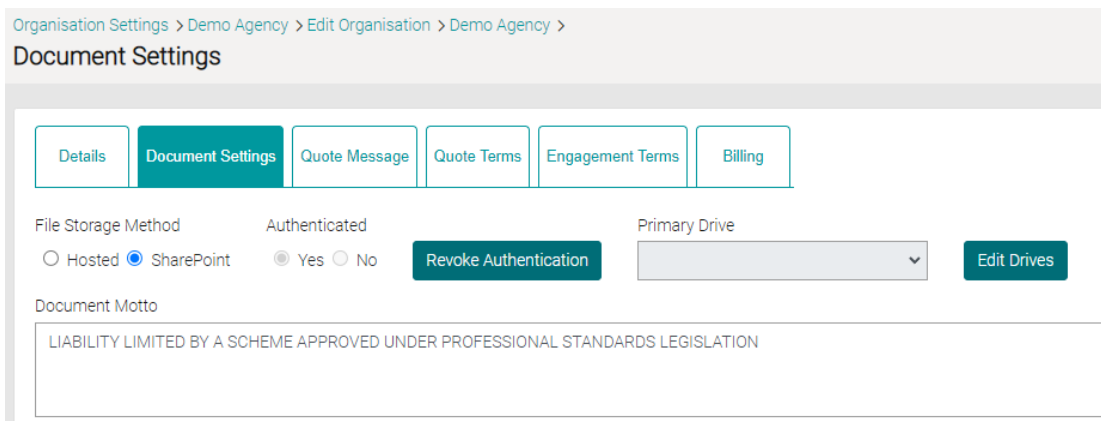
Note: You will only see this permission prompt once for your account. If you re-authenticate your connection (covered [later in this guide](#)) in future, you will not need to grant access again



- 4. Once you have granted authentication, you will be returned to the Certflow platform with the success message shown below. Click **Return to Organization Settings** to be redirected back to your Organisation Document Settings



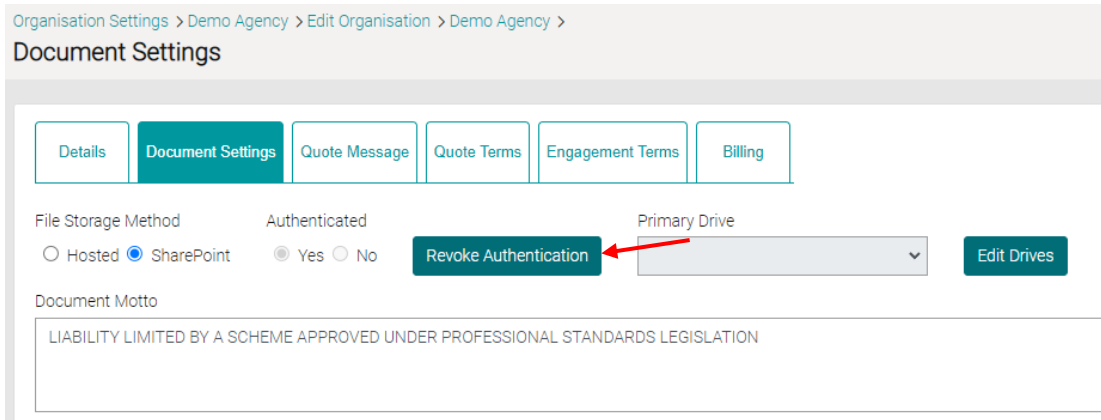
You will now see additional fields in the Document Settings tab that indicate the selected storage, and that allow you to revoke SharePoint authenticate if needed.



See [Selecting or Changing storage drive](#) and [Revoking and Re-authenticating SharePoint access](#) for more information.

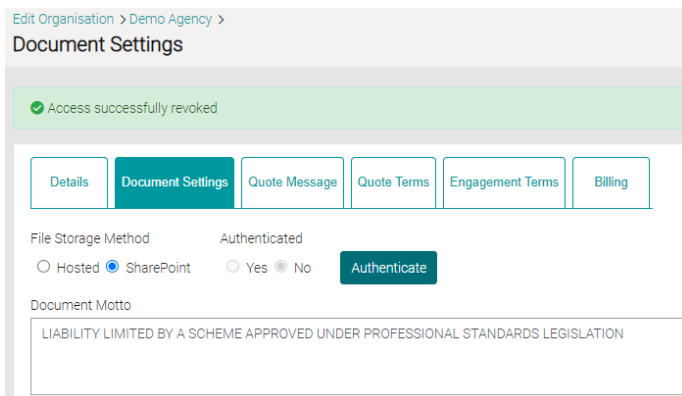
Revoking and Re-authenticating SharePoint access

Once you have **Authenticated** the connection between Certflow and your organisation SharePoint you will see a new **Revoke Authentication** button, in place of the Authenticate button that was visible previously



This button can be used at any point to revoke the current authenticate between SharePoint and Certflow. This is useful if you want to change the account used for authentication as the existing account access must be revoked before another can be added

To revoke authentication, simply click the **Revoke Authentication** button. A success message will appear at the top of the screen once access has been revoked, and you will see the **Authenticate** button appear once again



You can re-authenticate your connection at any point following the instructions to [Authenticate SharePoint](#)

Selecting or Changing storage Drive

Once you have Authenticated the connection between Certflow and your organisation SharePoint, you need to select which storage drive will be used for Certflow files and folders.

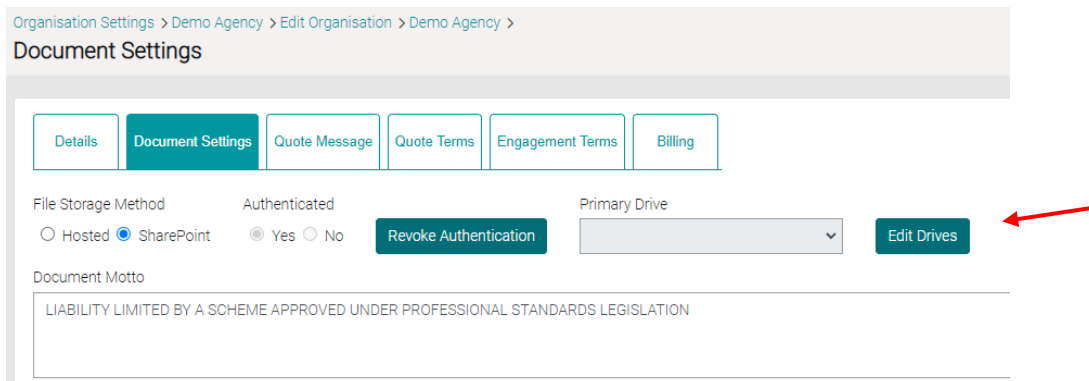
Some organisations will only have one drive configured in their SharePoint account, while others may have many. The drive selection process allows the Certflow system to support all organisation SharePoint configurations, and ensuring you have control over where files are stored.

A new **Primary Drive** field will now be visible alongside the existing **File Storage Method**, and the **Authenticated** status.

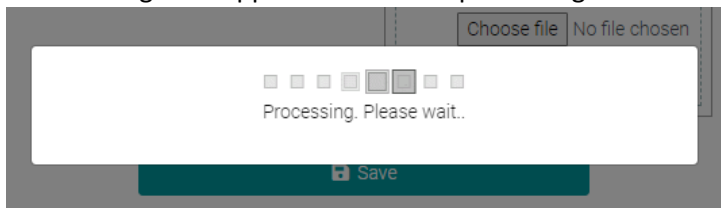
If this is the first time you are selecting a drive, the field will be blank. If you have previously selected a drive, the name of that drive will be displayed, along with a link to open it directly in a new browser tab

By default the drive field is disabled, this is prevent accidental changes to the drive selection. Follow the steps below to select your initial drive, or to change an existing drive selection.

1. Click the **Edit Drives** button.

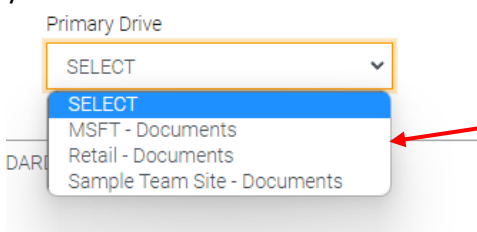


The Certflow system will poll your SharePoint account for a list of all accessible drives. This may take a few seconds depending on how many drives exist in your SharePoint account. A wait message will appear while this is processing



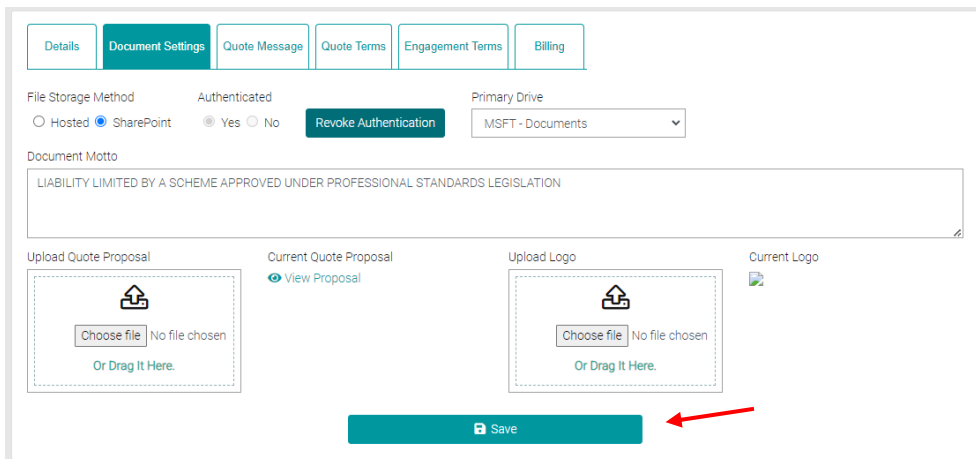
Once all accessible drives have been loaded this message will disappear, and the **Primary Drive** dropdown will be enabled

2. Click the **Primary Drive** dropdown to open it, and display a list of all accessible drives for your SharePoint account



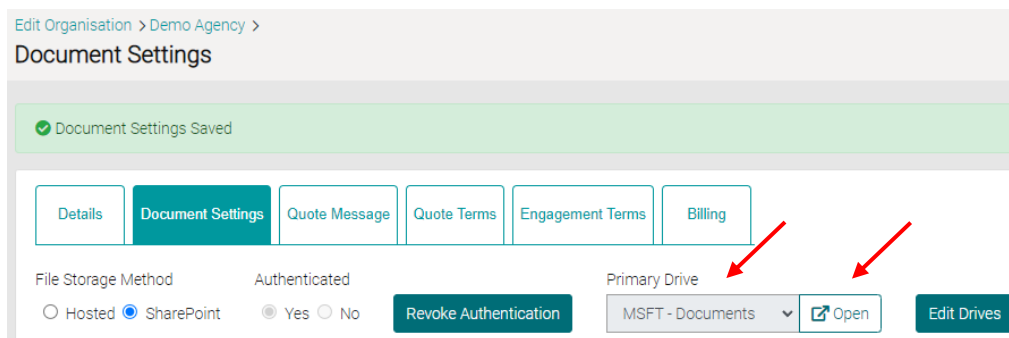
Click your selected drive from the list to select it

3. Click the **Save** button at the bottom to the Document Settings tab to confirm your drive selection



Once the document settings have saved, the Primary Drive dropdown will return to its initial disabled state, with your new drive selection showing.

- To change your selection, start again from Step 1 by clicking the **Edit Drives** button
- To open your selected SharePoint drive online, click the **Open** link beside the selected Drive



With the SharePoint drive selected, you have not completed SharePoint configuration.

The Certflow system will now read and write project documents directly to your SharePoint, and additional [SharePoint storage features](#) will be enabled.

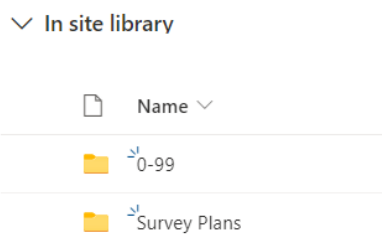
SharePoint file storage features

Once your organisation SharePoint connection is authenticated, and a drive has been selected, the following additional fields and feature will be enabled in the Certflow system.

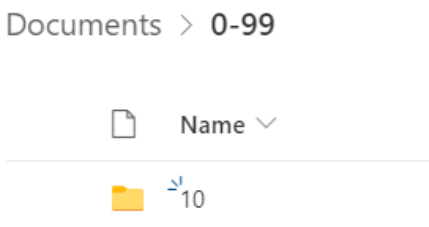
- Project Documents and Survey Plans will read and write from your organisation SharePoint drive
 - Survey Plans are read from a “Survey Plans” folder within the root directory of your selected SharePoint drive, this path will be created automatically if it does not already exist
 - Project Documents are organised into separate folder for each project. Project folders are grouped within number ranges for each 100 projects, and stored within the root directory of your SharePoint drive.

- e.g. Project number 10.
 All project files would be stored in a folder named “10”.
 This would be grouped in a folder named “0-99”
 The group folder would be stored in the root directory of your selected SharePoint drive

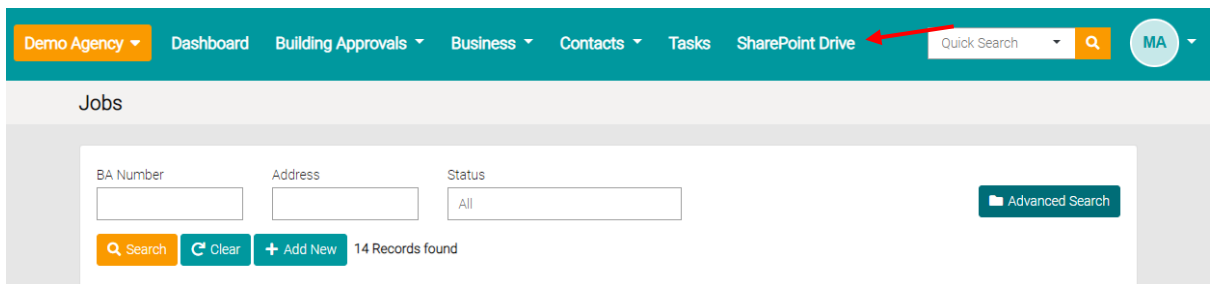
- Root directory of selected drive



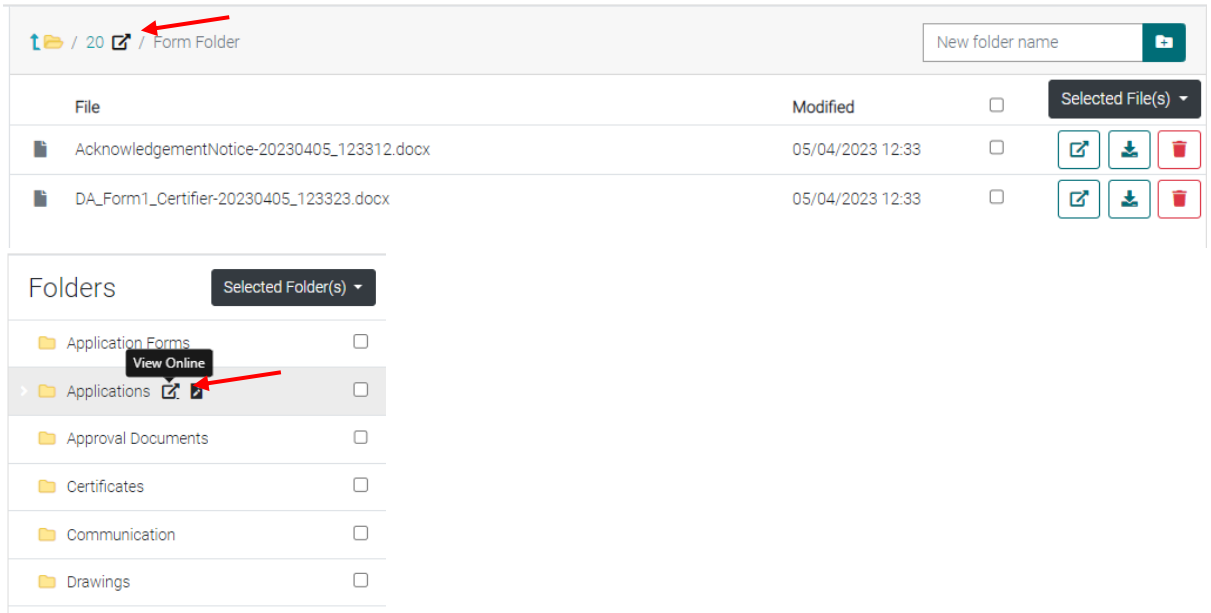
- Inside folder 0-99



- A direct link to your SharePoint drive will be added to the top navigation. Clicking this link will open your SharePoint drive in a new tab, allowing you to easily flick back and forth between Certflow and SharePoint online as needed



- A direct link will be added to every document folder in the Survey Plan and Job Folder file browsers, allowing you to open that folder directly in your SharePoint drive.
 - The folder will be opened in a new tab.
 - Links are added to the folders sidebar, as well as the breadcrumbs along the top of the file browser
 - To reduce screen clutter, these links only appear when hovering over the folder name



- A direct link will be added to every file in the Survey Plan and Job Folder file browsers, allowing you to open that file directly in your SharePoint drive.
 - The file will be opened in a new tab
 - Files will open in the SharePoint file viewer
 - Files that can be edited online – such as word documents – will open in the associated SharePoint file editor (e.g. Microsoft Word)
 - Files that are unable to be edited or previewed directly may download to your local machine instead of opening in SharePoint

