24th April 2023

ITAS Graph Service Set Up

Hivedome increased support for the ITAS Graph WebService in Trader Desktop version 8.17.0

Overview

The ITAS Graph Service (API) was introduced in version 8.15.0 primarily, but not exclusively, to act as a gateway to Microsoft 365 services such as Mail and Teams Chat. The initial integration supported the migration of the security procedures required by ITAS DocmanServer. Version 8.17.0 introduces support for SharePoint document storage.

The steps included in this document will enable ITAS customers to configure access for ITAS DocmanServer to nominated mailboxes through their Azure Portal and configure permissions for Teams and SharePoint.

Requirements

To ensure that the ITAS DocmanServer, Teams or SharePoint can be accessed by the Graph Service, the following actions should be taken:

1. Sites wishing to use these features will need to subscribe to the Graph Service, which will incur a monthly charge that will be applied to your regular ITAS Licence. Please contact Hivedome to discuss this upgrade. *****
2. Complete the Microsoft Azure set up and provide Hivedome with the configuration values detailed in the Configuration Values section of this document below.
3. Contact Hivedome to arrange the deployment of Trader Desktop version 8.17.0 to your server/s.

Please note this does not apply to Enterprise Services subscribers as the MS Graph Service will be included in this package.

Microsoft Azure Set Up

Step 1 - Register an application

- Create application in Azure Portal – see Microsoft documentation

- Create client secret
- Add permissions to application

Microsoft Graph					
Microsoft Graph	Chat.ReadWrite	Read and write user chat messages	Delegated	Admin consent	An administrator
Microsoft Graph	ChannelMessage.Send	Send channel messages	Delegated	Admin consent	An administrator
Microsoft Graph	Chat.Create	Create chats	Delegated	Admin consent	An administrator
Microsoft Graph	Mail.ReadWrite	Read and write mail in all mailboxes	Application	Admin consent	An administrator
Microsoft Graph	Sites.Read.All	Read items in all site collections	Application	Admin consent	An administrator
Microsoft Graph	Sites.ReadWrite.All	Read and write items in all site collections	Application	Admin consent	An administrator
Microsoft Graph	Files.ReadWrite.All	Read and write files in all site collections	Application	Admin consent	An administrator
Microsoft Graph	User.Read.All	Read all users' full profiles	Application	Admin consent	An administrator
Microsoft Graph	Files.Read.All	Read files in all site collections	Application	Admin consent	An administrator

Default (Everything)

- User.Read.All

Teams (Notification)

- ChannelMessage.Send
- Chat.Create
- Chat.ReadWrite

SharePoint (Document)

- Files.Read.All
- Files.ReadWrite.All
- Sites.Read.All
- Sites.ReadWrite.All

Mail (DOCMAN)

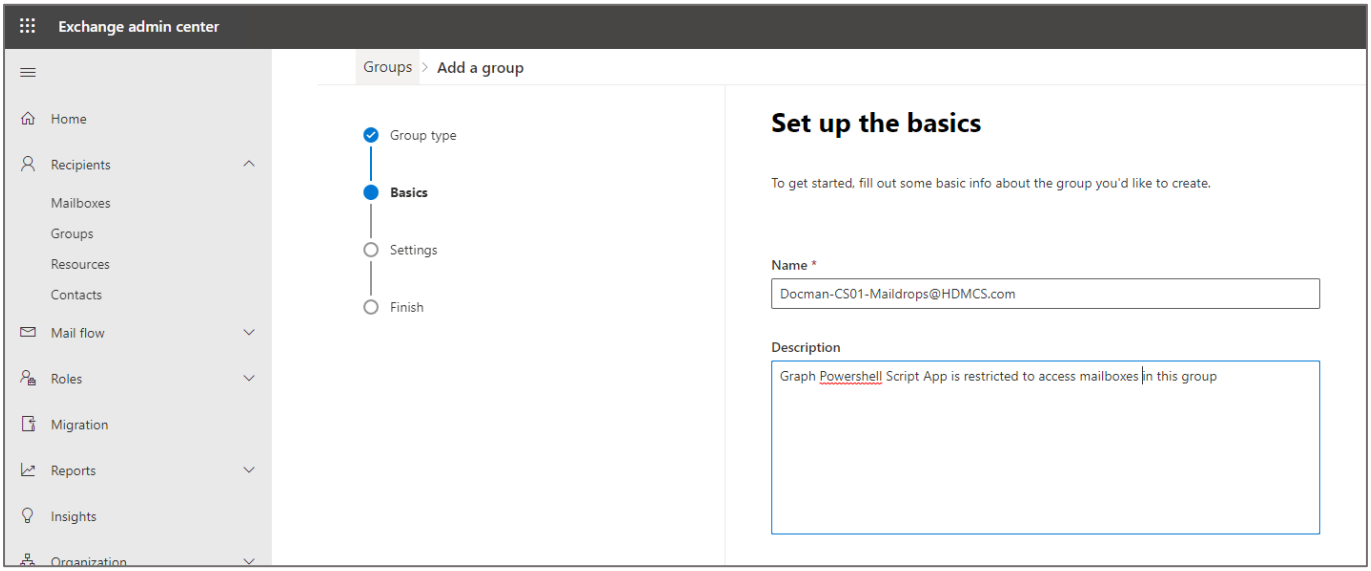
- Mail.ReadWrite

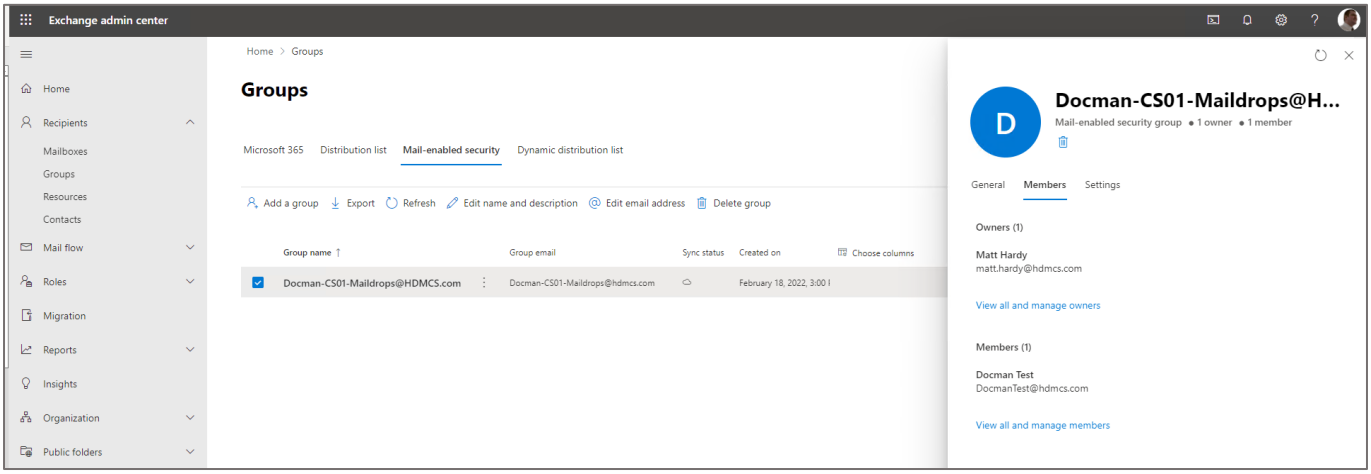
Note that additional permissions may be requested in future as we add more modules/functionalities to the service.

Step 1 - Define Application Policy

Create an Application Policy to restrict access from the application to specific shared mailboxes (e.g. Docman-Maildrops@test.com) instead of all mailboxes in the organisation.

First setup an Exchange mail group and add its members (shared mailboxes):





This policy will also need to be created on you application server/s using the below PowerShell script, ensuring the highlighted details are changed appropriately:

New-ApplicationAccessPolicy -AppId 60dd33c3-9eea-4bbb-922a-17b7b69bf0a4 -PolicyScopeGroupId Docman-CS01-Maildrops@hdmcs.com -AccessRight RestrictAccess -Description "Restrict this app to members of distribution group Docman-CS01-Maildrops."

```
RunspaceId        : f8ce9ffe-ec93-4725-9d2f-b9ade6f7485f
ScopeName         : Docman-CS01-Maildrops@HDMCS.com
ScopeIdentity     : Docman-CS01-Maildrops@HDMCS.com20220218150017
Identity          : be023abd-3c18-47e7-886f-de85b5cb1449\60dd33c3-9eea-4bbb-922a-17b7b69bf0a4:S-1-5-21-2103643036-1067027473-1901050440-54782643;abb2dca4-44f6-46d1-8aa5-5009626c20c5
AppId             : 60dd33c3-9eea-4bbb-922a-17b7b69bf0a4
ScopeIdentityRaw  : S-1-5-21-2103643036-1067027473-1901050440-54782643;abb2dca4-44f6-46d1-8aa5-5009626c20c5
Description       : Restrict this app to members of distribution group Docman-CS01-Maildrops.
AccessRight       : RestrictAccess
ShardType         : All
IsValid           : True
ObjectState       : Unchanged
```

Configuration Values

Once the Microsoft setup is complete, please supply the following configuration values to HIVEDOME for inclusion in your Trader Desktop configuration:

I. **Application (client) ID** [see Home->App registrations]
II. **Directory (tenant) ID** [see Home->App registrations]
III. **Client Credentials** [Client Secret created in Step 2 of the Setup]
IV. **Delegate credentials** (username & password). This should be an account in the same tenant as the application. It is used for delegate access type permissions e.g. the 'from' account when sending channel messages.

For more information or assistance with this set up, please contact your ITAS representative or support team.