

Antura SharePoint Connector

Antura AB, www.antura.se

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- Introduction 4
  - SharePoint connections 4
    - Supported versions 4
    - Antura Cloud or OnPremise? 5
- User Manual 6
  - Connect a document library in SharePoint to Antura 6
  - Documents linked to SharePoint 7
  - Add SharePoint libraries 9
  - Remove connected SharePoint library 9
  - Search for files and folders in SharePoint libraries 9
  - Edit a document in a SharePoint library 10
    - Edit and lock 10
    - Edit (only available for Word documents) 11
    - Open in SharePoint 12
  - Add or remove files and folders in a SharePoint library 13
    - Upload a file 13
    - Download a file or folder 14
    - Delete a file or folder 14
  - Copy files and folders between SharePoint libraries 14
  - Copy files and folders between Antura and a SharePoint library 14
  - Set properties on files 15
    - Create a document property for meta data in Antura 15
    - Create a column for meta data in SharePoint 16

- Update a property on a file in SharePoint library 18
- Appendix A: Activate Antura SharePoint Connector 19
  - Get started with Antura SharePoint Connector Server 20
    - Configure Antura SharePoint Connector Server 20
  - Get started with Antura SharePoint Connector Online 21
    - Register Antura as a client in your Microsoft Entra ID 21
    - Configure Antura SharePoint Connector Online 23
    - Microsoft 365 SharePoint Online REST API 24
- Appendix B: Troubleshooting 25
  - Reply url 25
  - Authentication failed 25
  - Reset SharePoint credentials 26

Introduction

With *Antura SharePoint Connector* it is possible to share a document library in SharePoint and link it to a project in Antura. Documents and folders can be created, edited and deleted in both systems. Searching documents in Antura also takes place in files and folders that are linked to Antura SharePoint Connector. If you use document properties (metadata) on files in Antura and these match properties in SharePoint, metadata can also be synchronized between Antura and SharePoint. Some document functions in Antura are not available for files and folders that are linked to Antura SharePoint Connector, such as "Mark as read", "Send for review / approval", "Mass update".

One of the benefits of Antura SharePoint Connector is the ability to use so-called co-authoring, allowing multiple people to edit a Word document at the same time. Permissions are synchronized between the systems.

SharePoint connections

Two different types of SharePoint connections are supported; *SharePoint Server* and *SharePoint Online*.

Depending on the current type of SharePoint connection, there is support for different authentication types;

- Form-based login - username and password are entered
- Windows authentication - automatic authentication via local Windows account
- Single Sign-On - automatic authentication via cloud account (e.g. a Microsoft 365 account)

It is possible to add several SharePoint links in one instance of Antura and multiple SharePoint libraries within one and the same project (ie in a file archive).

Supported versions

- SharePoint Online (Microsoft 365)
- SharePoint Server 2016 and SharePoint Server 2019

Antura Cloud or OnPremise?

Antura supports the following configurations of SharePoint

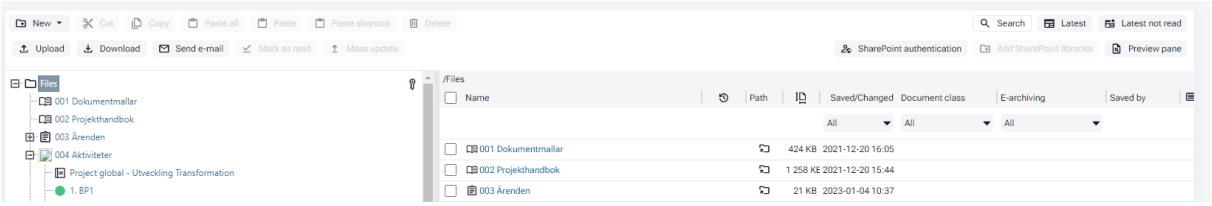
SharePoint product	Antura on premise	Antura in the cloud
SharePoint Online	Supported. Antura needs access to SharePoint Online.	Supported. Recommended that users authenticate towards SharePoint Online using Microsoft Entra ID and that Antura is configured to allow Single Sign-On.
SharePoint Server (inside Customer network)	Supported.	Not recommended. Antura needs access to SharePoint Server over the internet.

User Manual

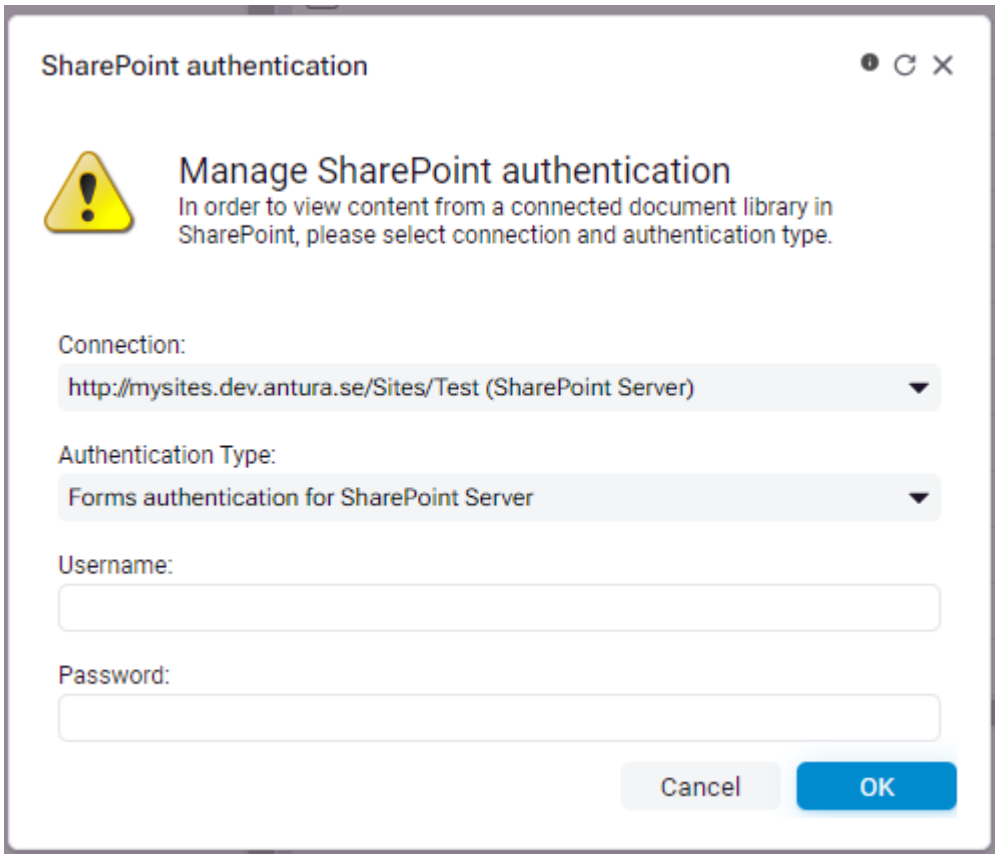
Connect a document library in SharePoint to Antura

It is only the project manager or users with the corresponding permissions in the project that has the permission to connect a SharePoint library to a project.

1. Go to *Project Place – Documents* in Antura.

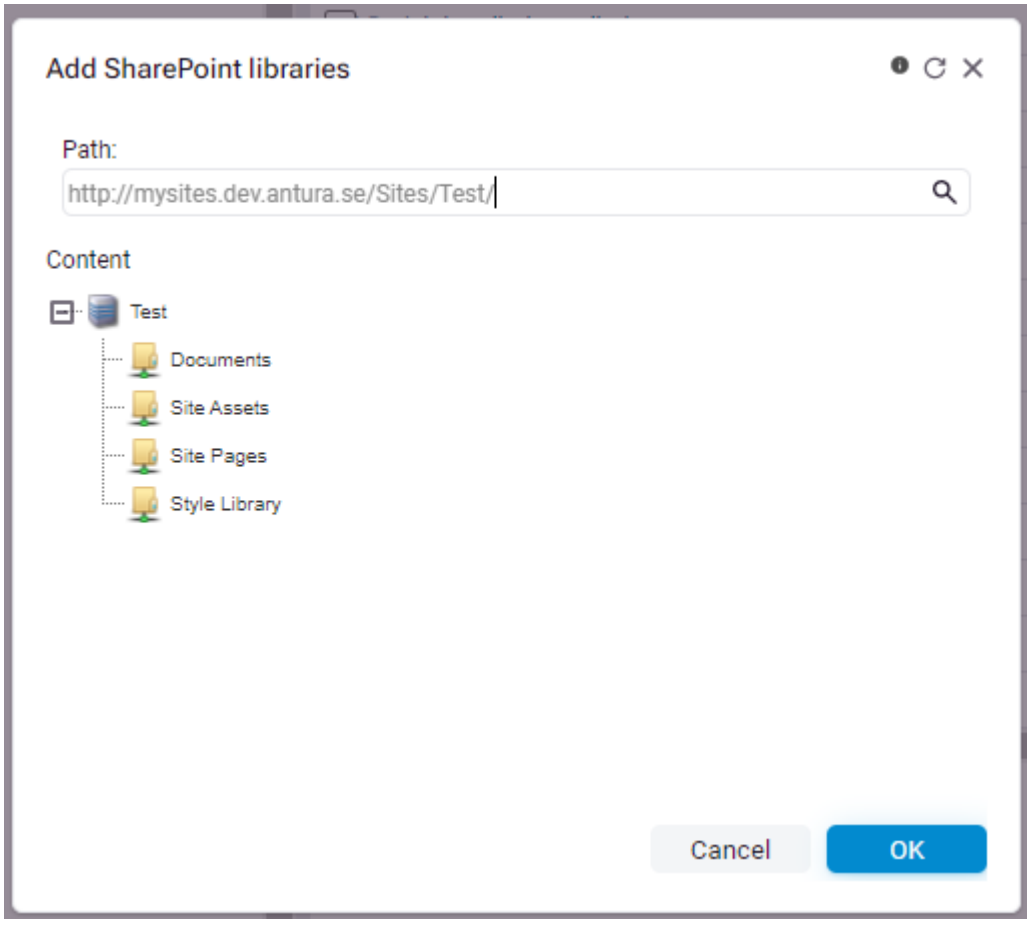


2. Click on SharePoint authentication



3. **Connection**: select a SharePoint-connection where the desired document library is located

4. **Authentication Type**: select authentication type. Note that the selected authentication type can be reset in the *user settings*, see "Appendix B: Troubleshooting"
    1. If you chose *Forms Authentication for SharePoint Online* or *Forms Authentication for SharePoint Server* enter your username and password[1]. These are encrypted and stored in the Antura Project database, and later used to authenticate towards SharePoint to access documents.
5. Click **[OK]**
6. Click on [Add SharePoint libraries]
7. **Path**: enter the path to the website in SharePoint where the desired document library is located and klick on Search-button.

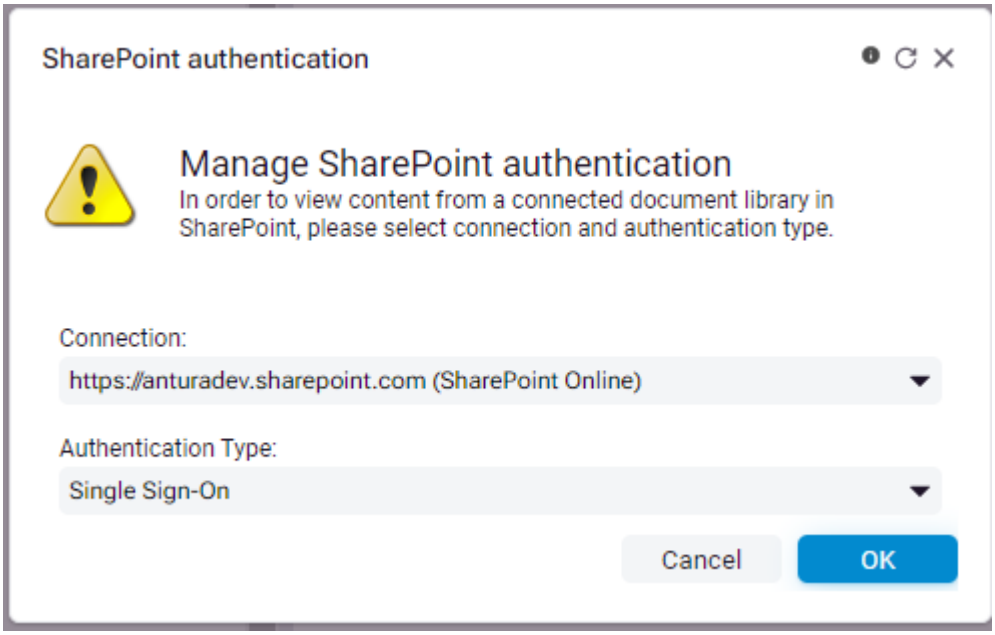


8. **Content**: select which document library in SharePoint to link to Documents[2].
9. Click [**OK**]

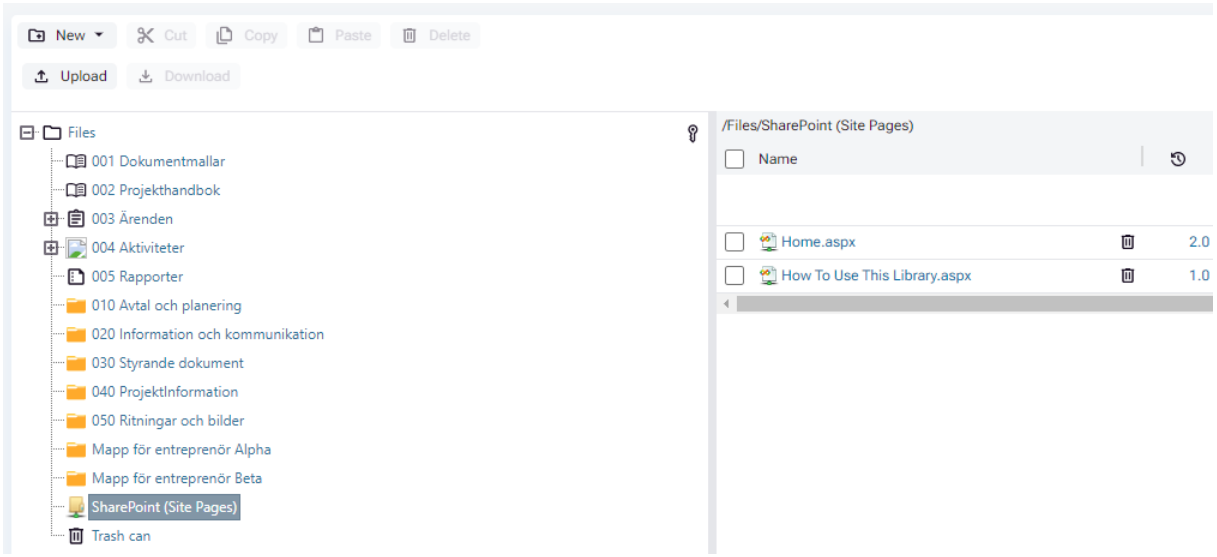
Documents linked to SharePoint

Once the project manager has connected the file archive to a SharePoint library, all users are automatically asked to authenticate to SharePoint when they click the SharePoint library in

Documents. If the file archive contains multiple linked SharePoint libraries, all SharePoint libraries become available provided the user has access to them in SharePoint.



SharePoint authentication No folders or files linked to SharePoint are displayed to the user in Documents as long as the user has not been authenticated. The user can access the authentication dialog by clicking [ ] in Documents.



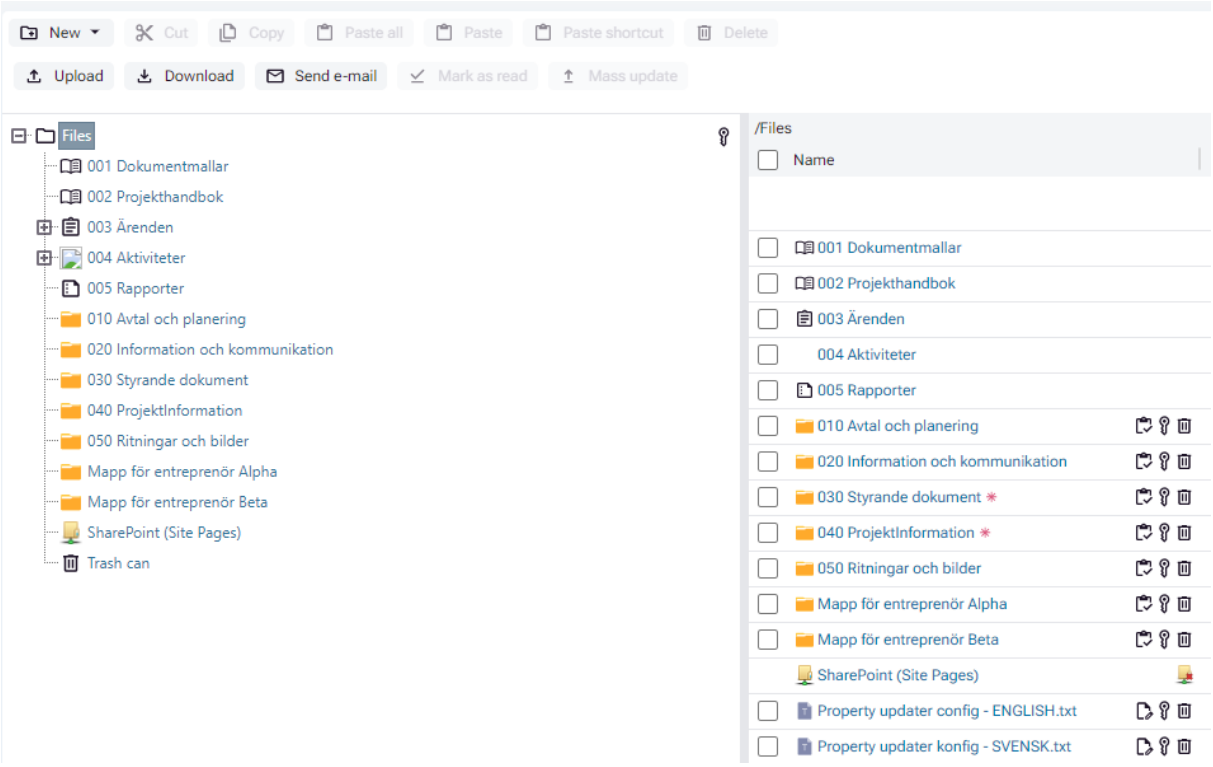
Note that users only have access to folders and files that the user has access to in SharePoint.

Add SharePoint libraries

It is possible to add more SharePoint libraries linked to a project in Antura. Additional libraries are added by clicking *Add SharePoint library* to the file archive in the project and selecting an additional library[3]. It is not possible to add the same library multiple times. A library that is already connected is not displayed in the tree structure.

Remove connected SharePoint library

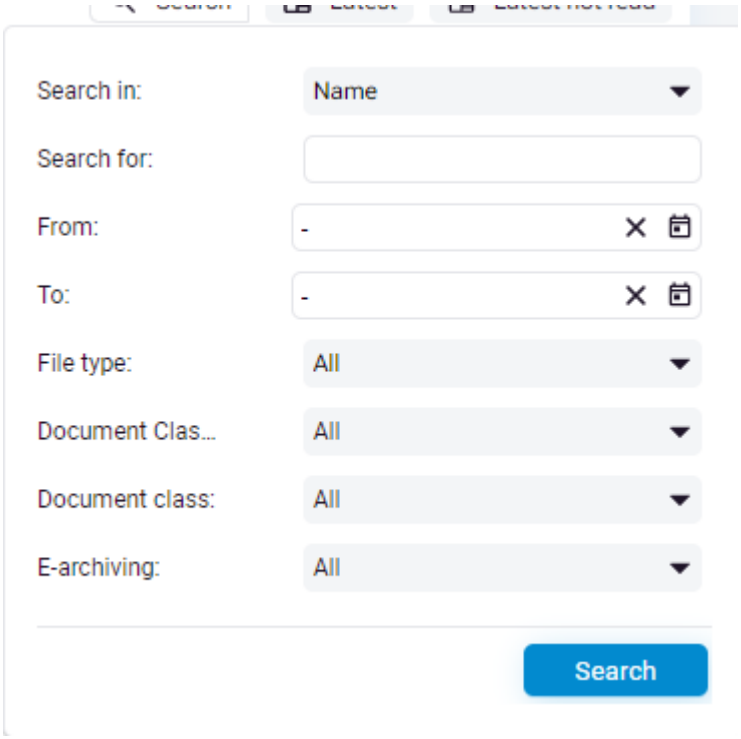
If you want to remove a SharePoint library that you have added to a project, you do so by navigating to the folder for the SharePoint library in Documents and clicking the icon to remove connected SharePoint library.



To remove a SharePoint library from a project, the Antura user needs to have permissions equivalent to a project manager (same as when adding a SharePoint library).

Search for files and folders in SharePoint libraries

When a SharePoint library is added to a file archive, it is also possible to search for files and folders in the linked SharePoint library using the usual search function in Documents with the exception of File type and any document properties.



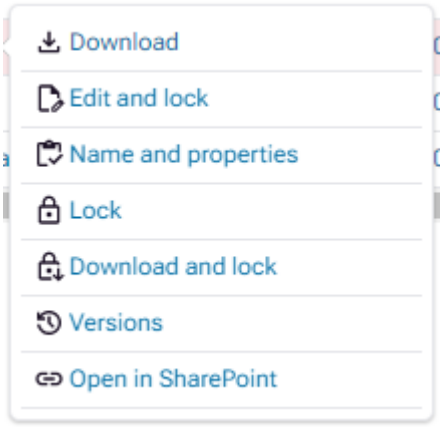
Edit a document in a SharePoint library

There are several ways to edit a document in a SharePoint library. The document can be opened from Antura or from SharePoint.

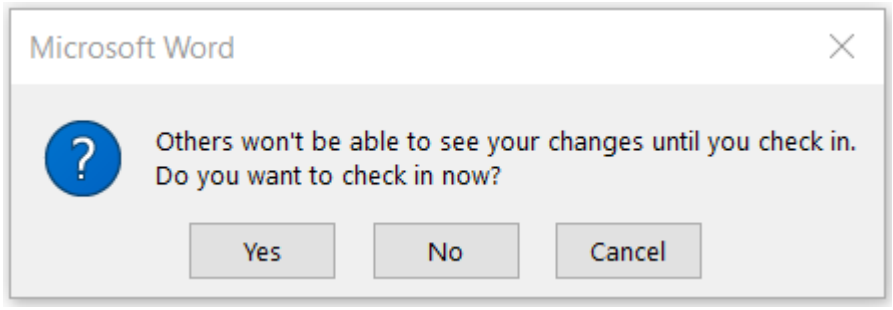
A document can be opened in Antura for editing with “Edit and lock” or “Edit”.

Edit and lock

Opens the document in its associated program and **locks editing for the document for other users both in Antura and in SharePoint**. Changes are saved to the SharePoint database when the user clicks on save in the program.



When the document is closed, a question whether the user wants to check in the document now or not appears.

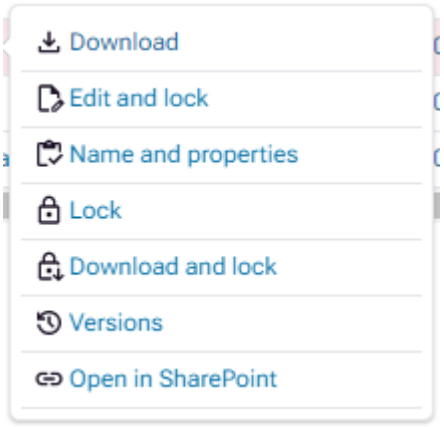


If the user selects:

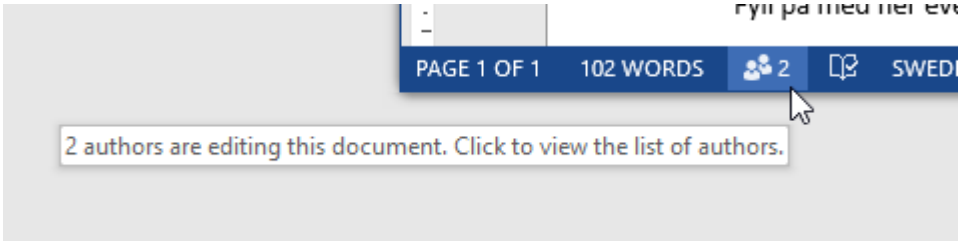
- **Yes**, the changes will be visible to other users. A dialog appears where the user can enter a comment to the version and choose whether the document should be locked after the check in.
- **No**, the changes will not be saved and the document remains locked until the user manually unlocks it using “Unlock” in Antura (Or “More” > “Check-in” in SharePoint).
- **Cancel**, the document will remain open and on-going editing can continue.

Edit (only available for Word documents)

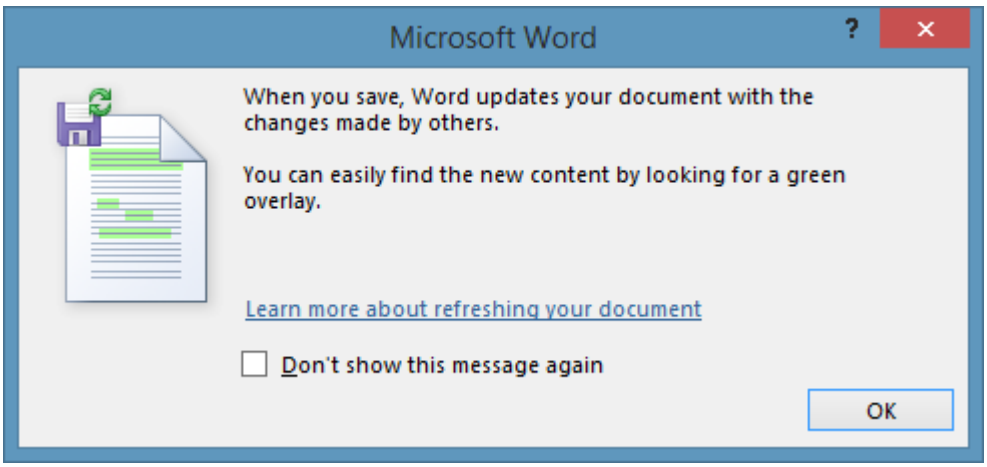
Opens the document in its associated program. The user can edit the document, and **other users can open and edit the document at the same time**, so called co-authoring.



If another user also opens the document at the same time, a message will appear indicating this in the editing program. All users who are editing the document can be seen at the bottom left corner of the program.

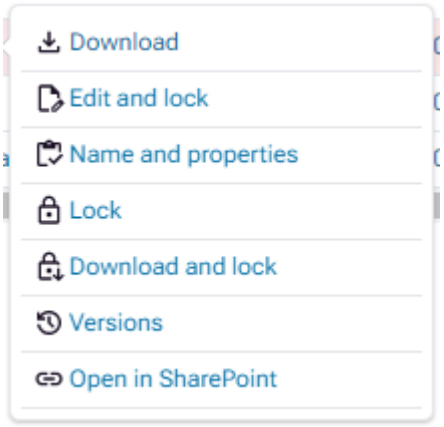


When a change has been made and saved by someone, the other users will be notified that they can see the changes by saving (and thereby synchronize the document). The new changes are shown in the document highlighted in green and all changes made until then are saved.



Open in SharePoint

Opens the folder where the document is located in SharePoint. The document can also be opened and edited from the SharePoint folder.



Add or remove files and folders in a SharePoint library

A file or a folder can be added or deleted directly in Antura or in SharePoint. The changes are synchronized and updated when the page is refreshed. If you want to do major restructuring in SharePoint, the recommendation is to do it in SharePoint.

Upload a file

A file linked to Antura SharePoint Connector can be uploaded in the same way as any ordinary files in *Project place – Documents* in Antura.

To upload a file via Antura:

1. Open the folder in *Project place – Documents*, where the file should be uploaded.
2. Use one of the following options for uploading:
    - The button **[Upload]**
    - The button **[Drag and drop]**
    - Drag file into the browser (only supported in browsers supporting HTML5, such as Firefox, Internet Explorer 10 and 11)

You cannot upload files larger than 2GB to SharePoint via Antura.

Download a file or folder

When downloading files and folders that are linked to Antura SharePoint Connector, no dialog is displayed to select whether you want to download only the latest version of the files or all versions. For files linked to Antura SharePoint Connector, the latest version of the marked files is selected.

Delete a file or folder

A file or folder can be deleted from a SharePoint library in Antura by clicking on the trash icon **[🗑]**. Deleted file can be restored in SharePoint by navigating to the recycle bin, selecting the file and clicking *Restore*.

Copy files and folders between SharePoint libraries

A file or folder can be copied from one SharePoint library to another SharePoint library in the file archive. However, you cannot replace an existing file by pasting a file that already exists in the SharePoint library.

It is also possible to move files and folders between connected SharePoint libraries in the file archive. However, it is not possible to move or copy folders between SharePoint libraries located on different SharePoint sites.

Copy files and folders between Antura and a SharePoint library

A file or folder can be copied between a SharePoint library and Antura. However, you cannot replace an existing file in a connected SharePoint library by pasting a file that already exists in the SharePoint library in Documents.

It is not possible to move files or folders between Antura and a SharePoint library. If you try to move a file or folder by cutting and pasting the file/folder or by dragging and dropping the file/folder into a connected SharePoint library in Documents, you will be asked if you want to copy the file or folder.

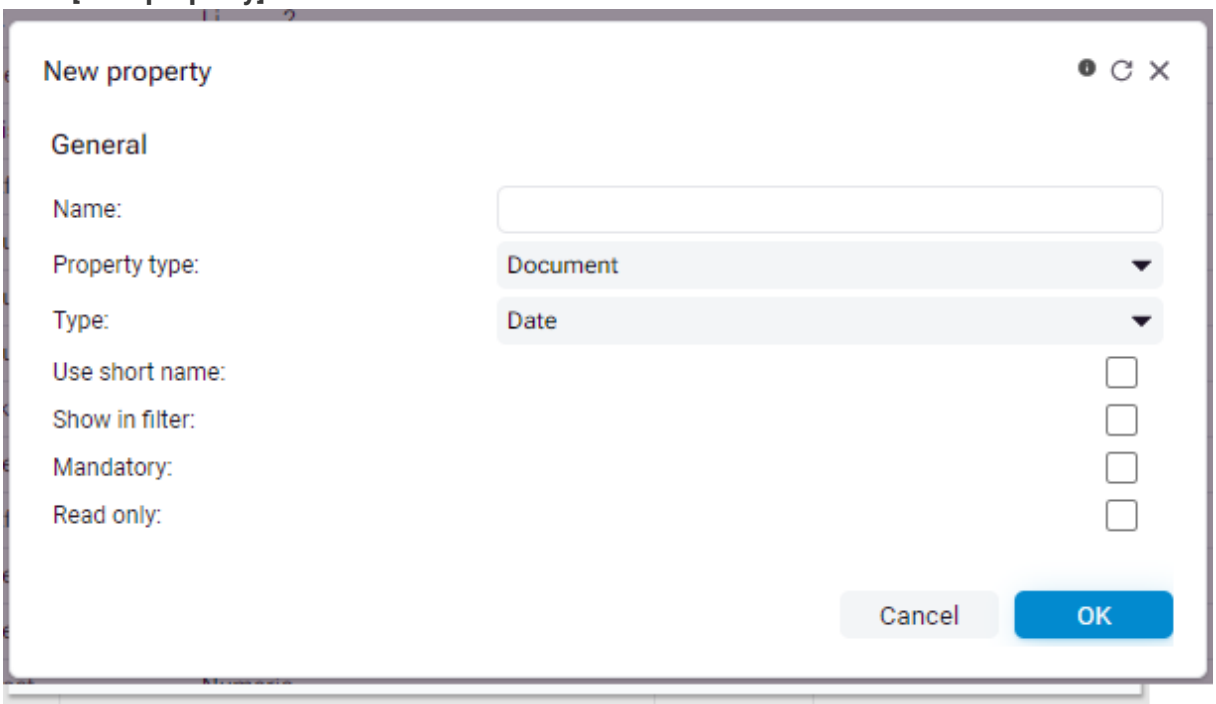
You cannot copy files larger than 2GB from Antura to SharePoint.

Set properties on files

It is possible to use document properties (meta data) on files in Antura and synchronize them with corresponding SharePoint library. To be able to sync the document properties, you will need to ensure the name of each property are identically matched in Antura and SharePoint (type and value may differ). It is also important that the type and selectable values match between Antura and SharePoint. *Note that, if using multiple libraries, the properties must match for all affected libraries in SharePoint.*

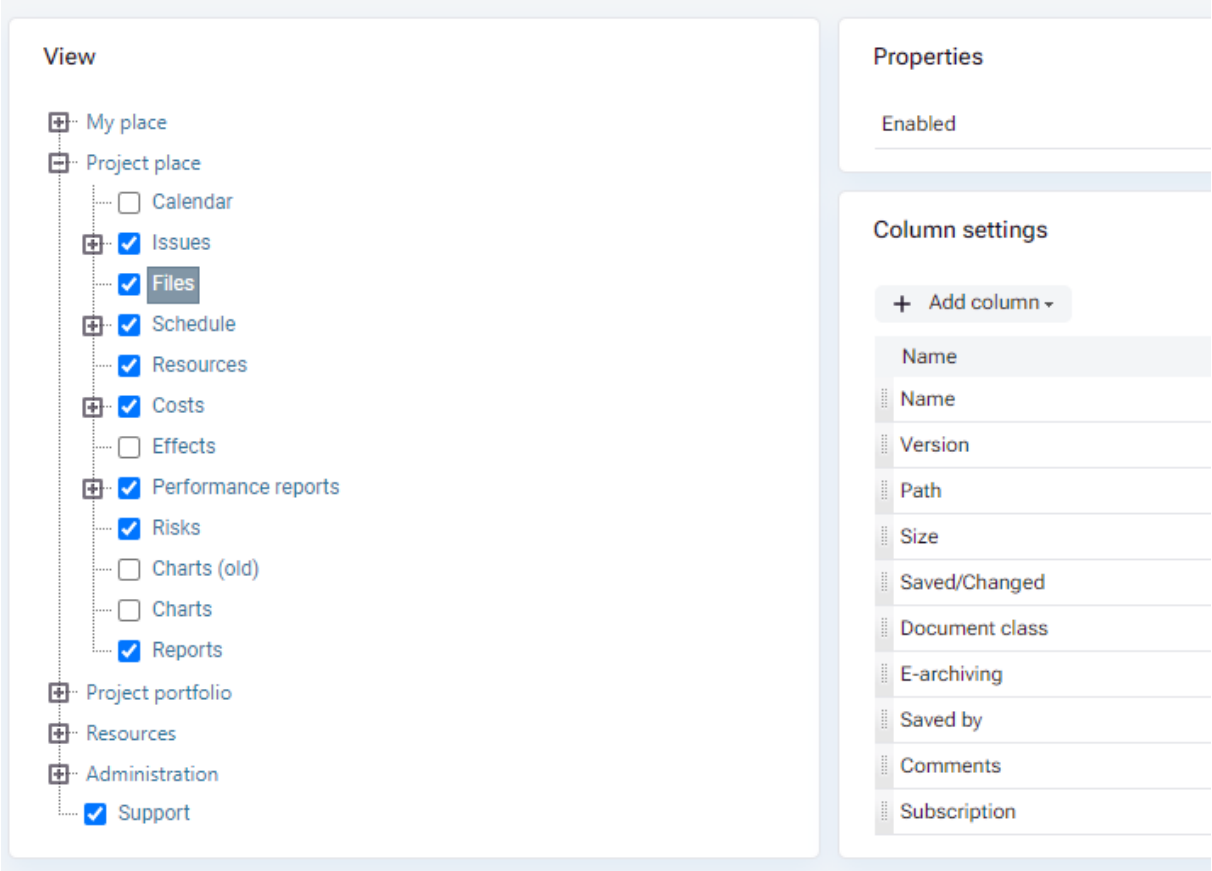
Create a document property for meta data in Antura

1. Go to *Administration – System – System properties* in Antura.
2. Click **[New property]**.



3. Choose “Document” as property type.
4. Fill in the rest of the parameters. Requirements to synchronize properties | The following types of document properties in Antura can be matched with the property in SharePoint: |
    - **Text**
    - **List**
    - **Numeric**
    - **Numerical list**
    - **Date**

5. Click **[OK]** to save. The document property is now created. It needs so be added as a column in the project's file archive.
6. Go to *Administration – System – View settings* in Antura.
7. Select to display the view *Project place – Documents.

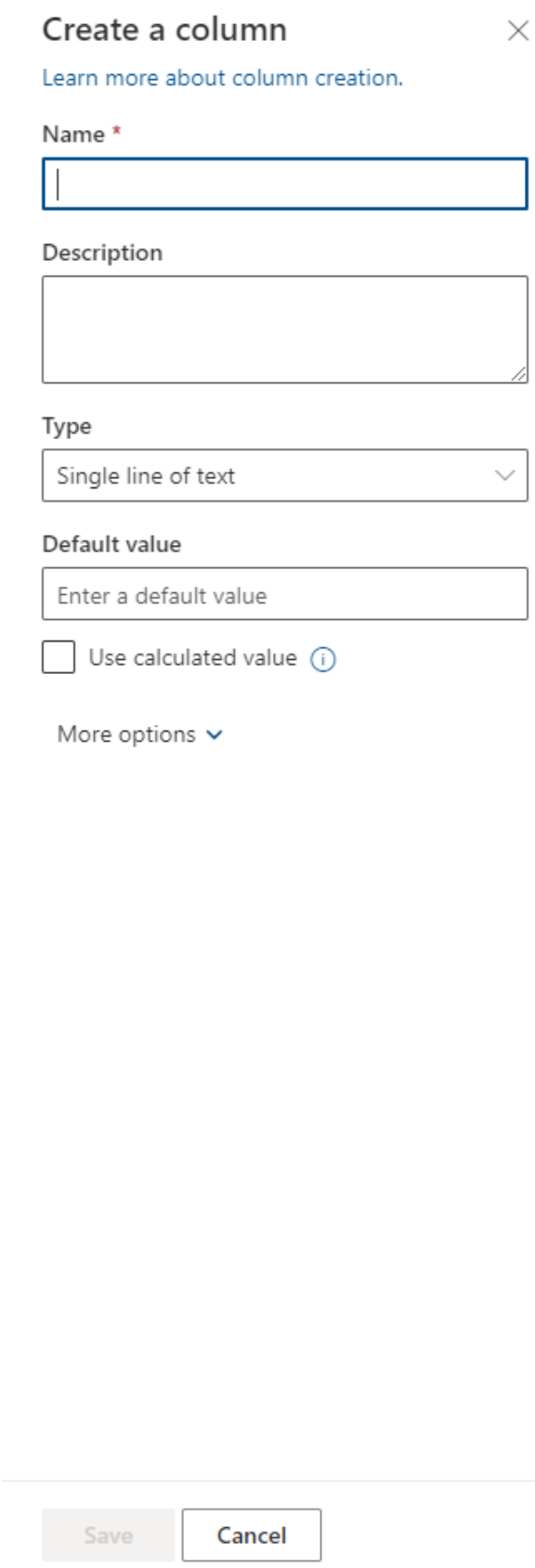


8. Click **[Add column]** and select the property that you want to synchronize with the SharePoint library.

Create a column for meta data in SharePoint

1. Log on to SharePoint and go to tab *Library*.
2. Click on **[Add column]**.

3. Fill in the parameters for the column to match the property in Antura.



Requirements to synchronize properties The following properties in SharePoint can be used

(provided they have the same corresponding name of the property and the same options as the property in Antura): |

- Single line of text
- Multiple lines of text
- Alternative (multiple choice menu)
- Numbers (1; 1,0; 100)
- Date and time
- Yes/No (checkbox) (works only if the document property in Antura is a list with the options Yes/No.)

4. Click **[Save]** to save.

Update a property on a file in SharePoint library

When a property is created in Antura and a column in SharePoint using the sections above, the properties can be updated and synchronized.

To update a property on a file in the SharePoint library via Antura:

1. In the projects file archive, click and edit directly in the property column of the file for which property shall be updated on alternatively go via menu item “Name and properties”.
   Note that properties can only be edited in Documents if the corresponding property with the same name and type also exists in the current SharePoint-library!

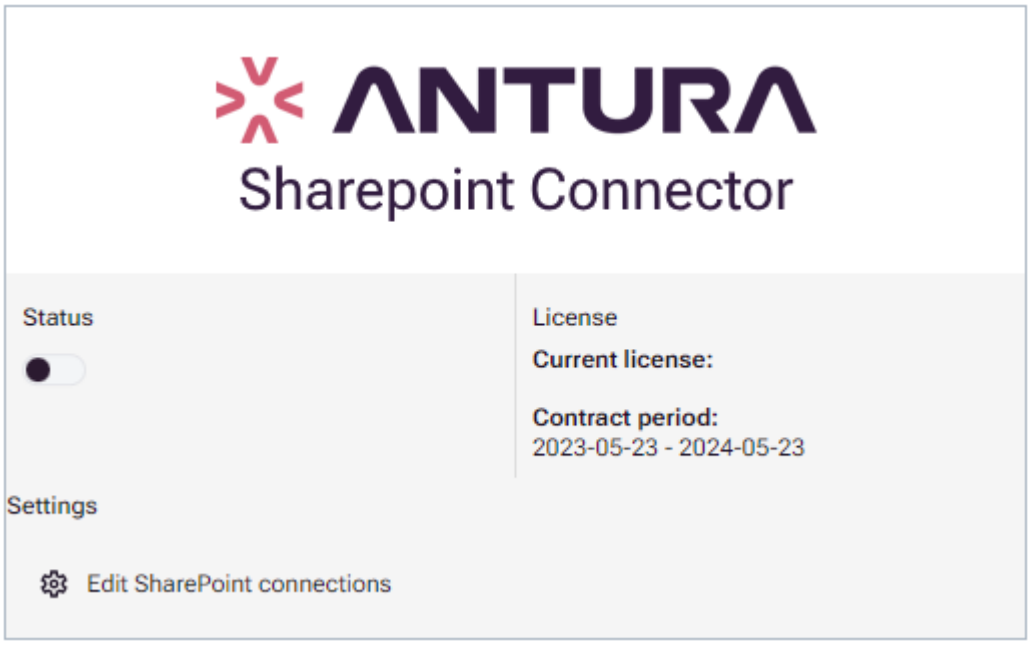
To update a property on a file in the SharePoint library via SharePoint:

1. Right click on the file that the property shall be updated for.
2. Choose *More* > *Properties* and fill in the fields that the property shall be updated for.

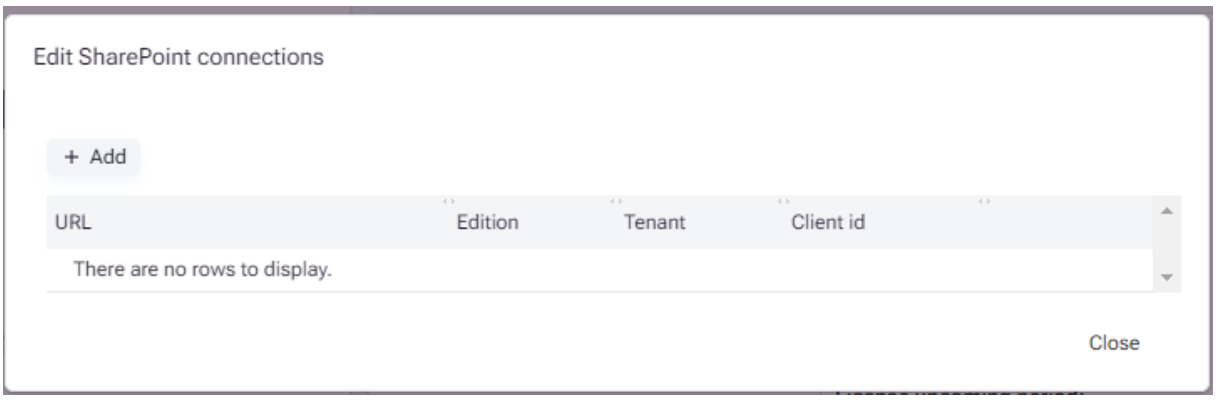
Appendix A: Activate Antura SharePoint Connector

Antura SharePoint Connector is an add-on product and needs to be activated manually in Antura. The activation can be done by an administrator in the view *Administration – Add-ons*.

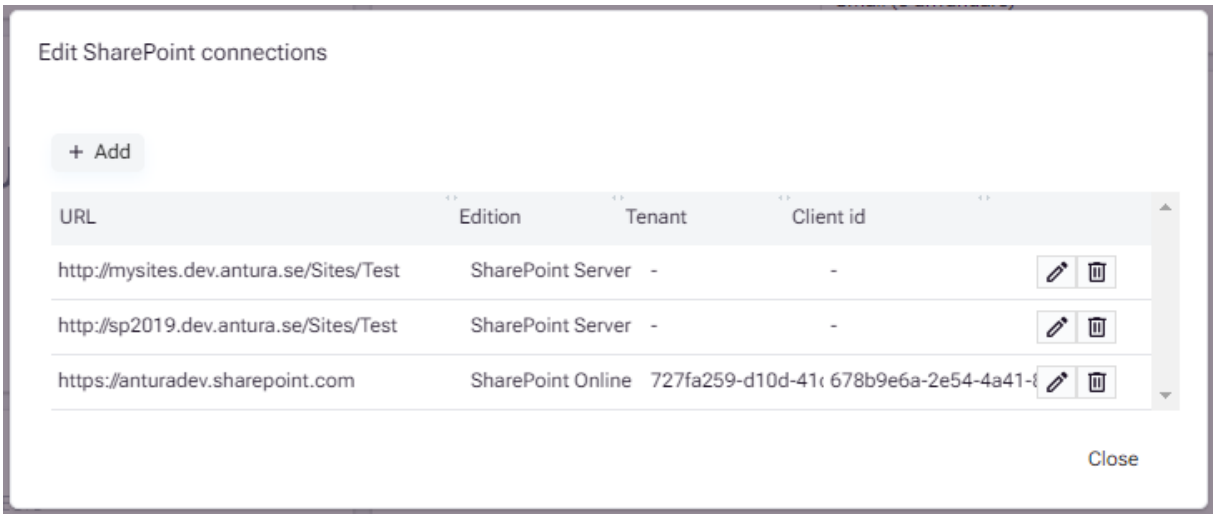
Activate Antura SharePoint Connector via the Status button.



To manage connections to SharePoint sites, use the settings function accessed via Edit SharePoint connections.



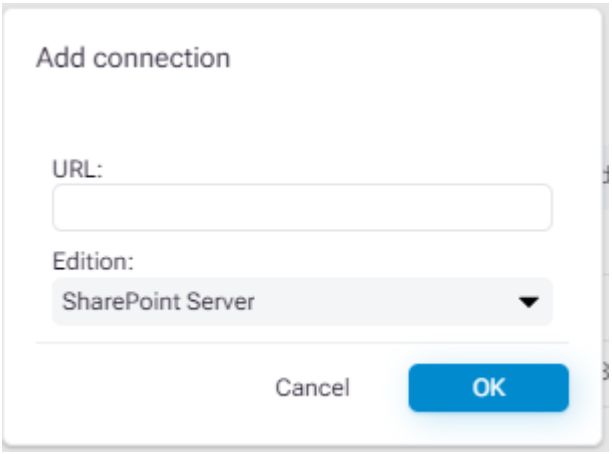
Antura supports multiple connections to SharePoint. Follow the instructions below depending on whether a connection to SharePoint Server or SharePoint Online is to be configured.



Get started with Antura SharePoint Connector Server

Configure Antura SharePoint Connector Server

1. Click on Edit SharePoint connections in the Add-Ons view for Antura SharePoint Connector
2. Click [+ Add]



3. **URL**: Enter the address for the SharePoint instance. Note that the URL to SharePoint is just the base url; typically https://[sharePointServerName].[yourOrganizationsName].com
4. **Edition**: select *SharePoint Server*

Get started with Antura SharePoint Connector Online

SharePoint Online requires a slightly different setup. We recommend using the Single Sign-On option.

Note 'Form-based authentication for SharePoint Online' does not work with the Microsoft recommended default security settings in Microsoft Entra ID. Form-based authentication for SharePoint Online does not work for users who have Multi-Factor Authentication (MFA) enabled (which is included in Microsoft's recommended default settings).

Register Antura as a client in your Microsoft Entra ID

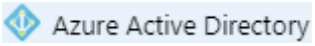
The integration of Antura with SharePoint Online requires additional setup in Microsoft Entra ID. Ask your Microsoft Entra ID administrator to do this.

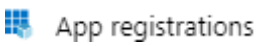
Main requirements:

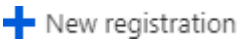
- The Antura site must run https.
- A client application must be manually registered in Microsoft Entra ID (see below).
- If Antura is accessed from multiple URL:s, a redirect URL must be added for each unique URL.

Register Antura as an application (OAuth client) in Microsoft Entra ID

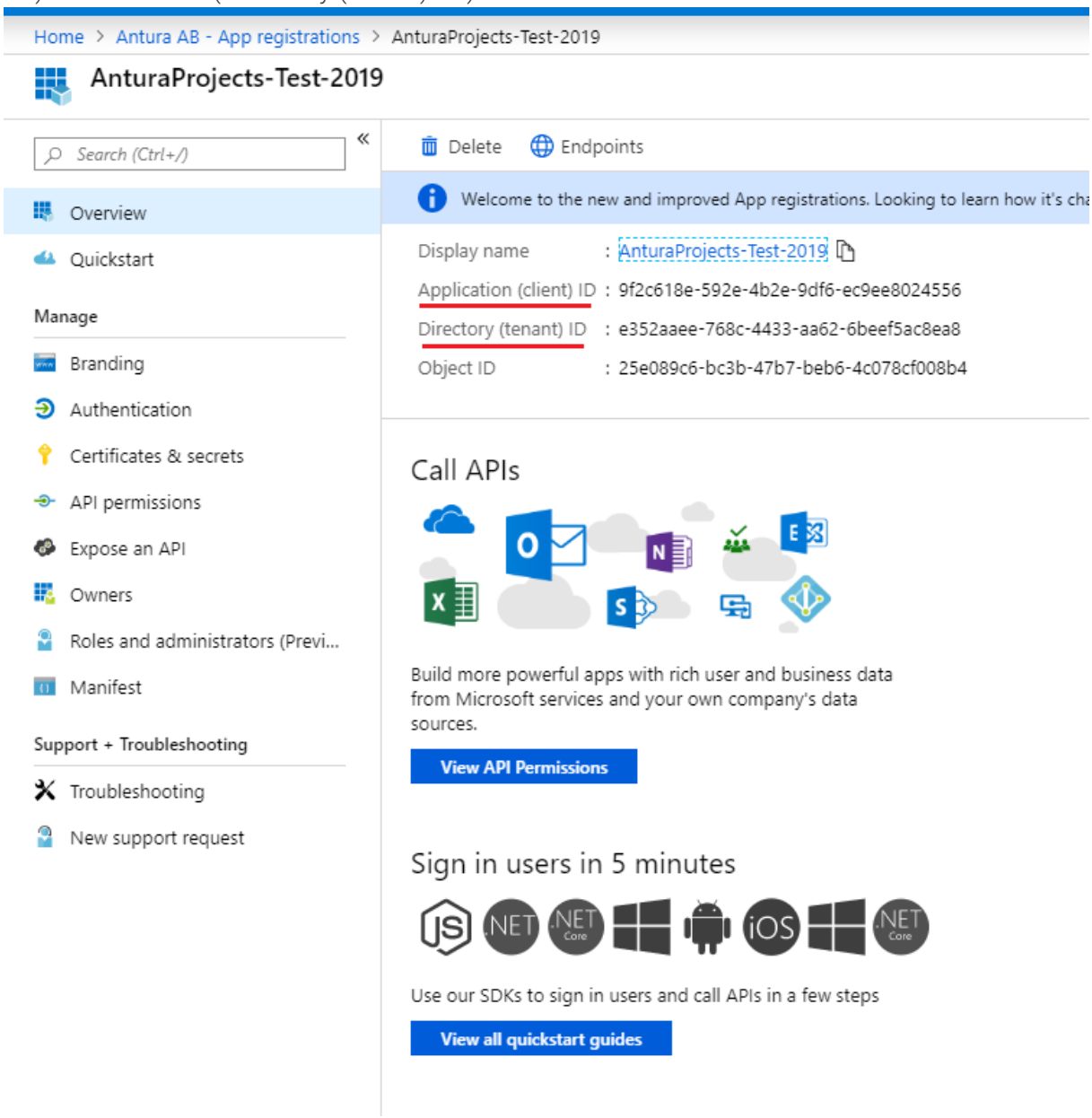
For Antura to be able to authorize SharePoint users using OAuth 2.0, Antura must be manually registered as a client application in Microsoft Entra ID. The following steps require Microsoft Entra ID admin access.

1. Log in at https://entra.microsoft.com/ (Microsoft Entra admin center) with your Microsoft 365 account.
2. Click 

3. Click 

4. Click 

5. Enter the following information:
    1. **Name** - the name of the application, can be anything, e.g. “Antura”.
    2. **Redirect URL** – https://[SITE_URL]/AnturaProjectsForSharePoint/WebServices/SharepointRedirect.ashx. Where [SITE_URL] is the main URL to the Antura site, e.g. example-organisation.projects.se. This URL tells the SharePoint login page where to redirect users after they have successfully logged into SharePoint.
6. Don't forget to click save!
7. Navigate to the newly created application and take note of the Client id ("Application (client) ID") and Tenant id ("Directory (tenant) ID").

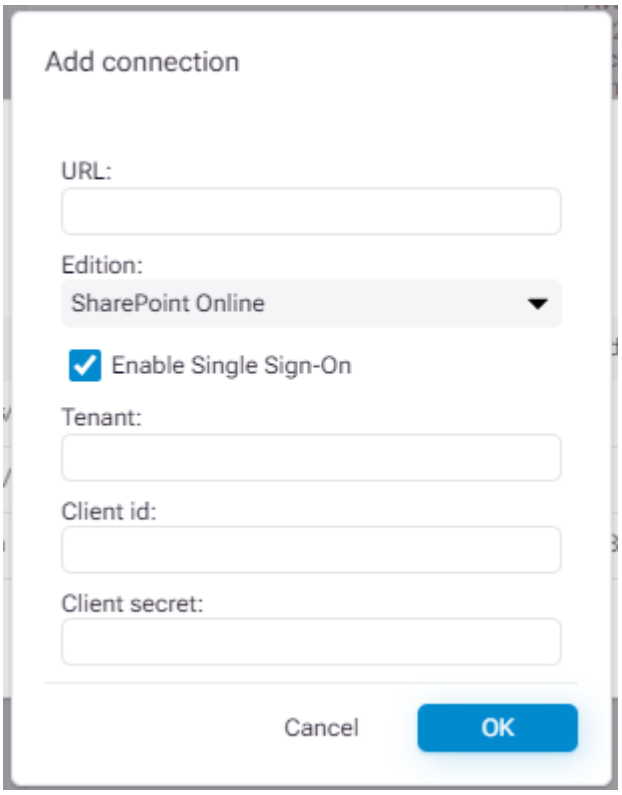


Create a client secret

1. Click Certificates & secrets
2. Click *New client secret*.
    1. **Description** – can be anything.
    2. **Expires** – preferable *Never*, otherwise you need to keep track of when it expires and update the configuration inside Antura accordingly.
3. Click *Add*.
4. Copy/take note of the client secret value, this is the only time the generated secret is available. If you forget this, simply delete the client secret and add another one, an application can have an unlimited number of client secrets.

Configure Antura SharePoint Connector Online

To manage connections to SharePoint sites – use the settings functionality in Administration – Add-Ons – Antura Project for SharePoint:

1. + Add Click on *Edit SharePoint connections* in the Add-Ons view for Antura SharePoint Connector
2. Click [

]

3. Enter the required information in the dialog. You will find the information in your Microsoft Entra ID - it was the one created in the previous section.
    1. **URL**: Enter the address for SharePoint Online. *Note that the URL to SharePoint is just the base url*; typically https://[yourOrganizationsName].sharepoint.com
    2. **Edition**: select *SharePoint Online*
    3. **Enable Single Sign-On**: Yes
    4. **Tenant**: An instance of an Microsoft Entra ID directory (copy *Directory (tenant) ID* from App registrations in the Microsoft Entra admin center)
    5. **Client-id**: The unique identifier that Microsoft Entra ID issues to an app registration (copy *Application (client) ID* from App registrations in the Microsoft Entra admin center). Also called Program ID.
    6. **Client secret**: Client secret (Secret value) in Microsoft Entra ID noted in the section "Create a client secret" above.

Microsoft 365 SharePoint Online REST API

Antura accesses SharePoint Online through the Microsoft 365 SharePoint Online REST API.

The required permissions for the application are:

- **openid** - Use the OpenID Connect protocol
- **offline_access** - Give access for an extended time through refresh tokens
- **SharePoint Online AllSites.Manage** - Allows the app (Antura) to read, create, update, and delete document libraries and lists in all site collections on behalf of the signed in user.

Note that this does not mean that Antura gains more permissions than the logged in user.

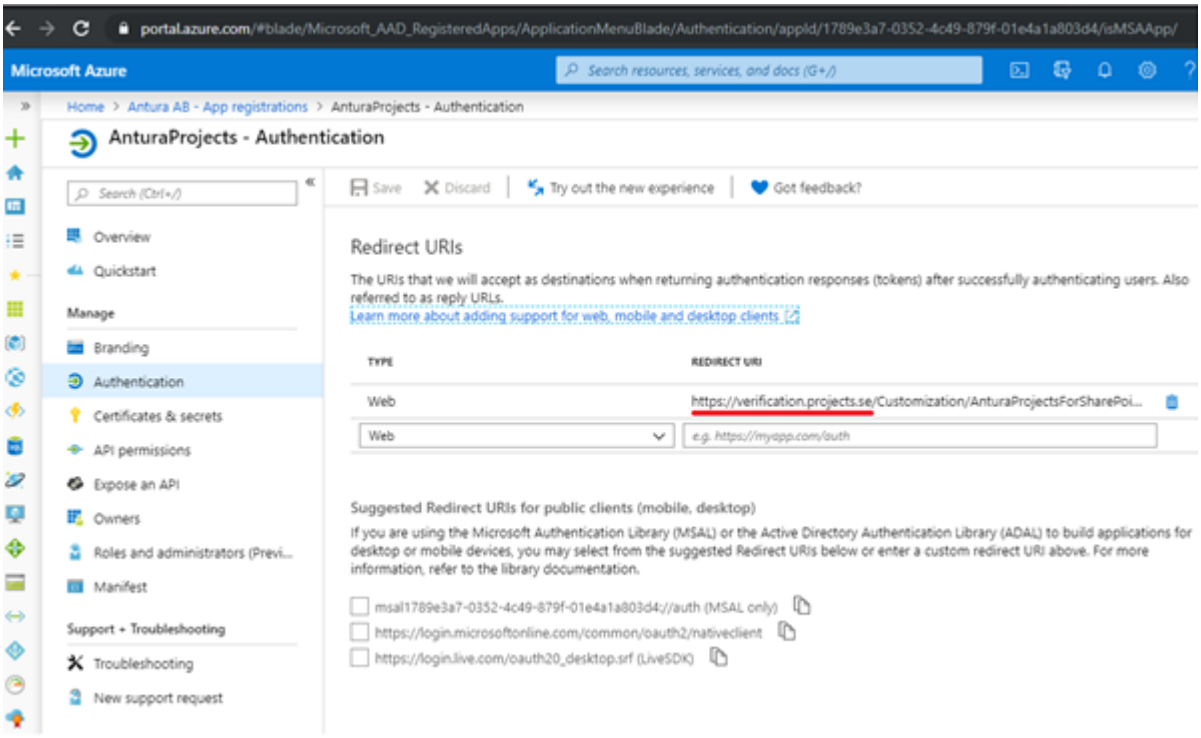
See https://learn.microsoft.com/en-us/entra/identity-platform/permissions-consent-overview for details on the API permission model.

Appendix B: Troubleshooting

Reply url

“The reply url specified in the request does not match the reply urls configured for the application”

This indicates that either the redirect URL in Microsoft Entra ID is not configured correctly (missing characters during copy paste, extra space etc.) or the redirect URL does not match the primary website URL of the Antura site (is set via the *Url:PrimaryWebSiteUrl* setting in the Application.config file).



Authentication failed

Error message in the Antura Project log:

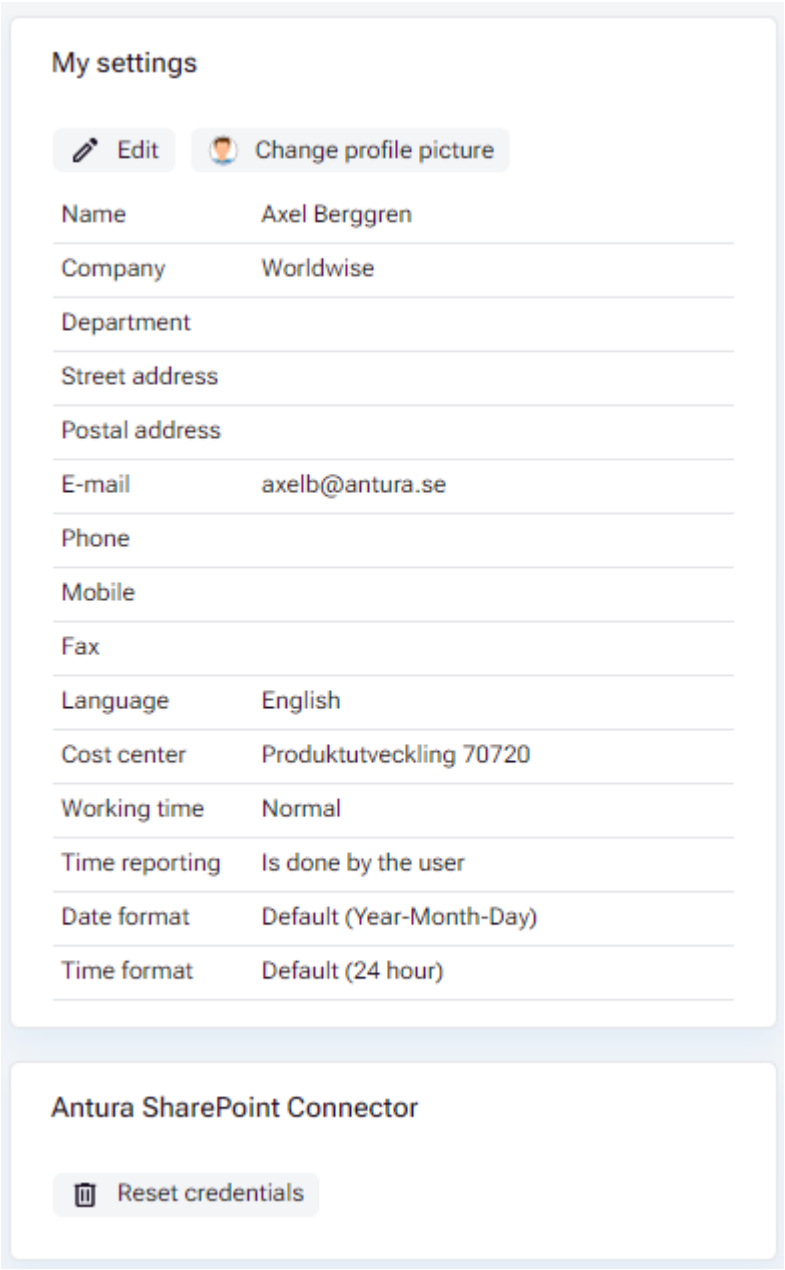
Microsoft.SharePoint.Client.IdcrlException: The sign-in name or password does not match one in the Microsoft account system

The issue may be because the user has Multi-Factor Authentication (MFA) enabled in Microsoft Entra ID (which is Microsoft's default setting). Use Single Sign-On or turn off the setting by setting *Enable security default* to 'No'.

Reset SharePoint credentials

A good first step in resolving SharePoint related authentication issues, especially during configuration of SharePoint SSO is to reset the SharePoint credentials and trying again in a new browser session.

1. Start a new browser session (e.g. “New private/incognito window”, CTRL+SHIFT+N).
2. Log into Antura.
3. Go to My place – Settings.



4. Reset credentials Click and confirm in the dialog.

5. Navigate to Project place – Documents.

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1. For connection to SharePoint Online, the user's account information in Microsoft 365 is entered (often the same as the user's information in Active Directory); for connection to SharePoint Server, the user's account information in Active Directory is entered.↩
2. The tree view that is displayed is permission-controlled and shows all document libraries in SharePoint where the user holds read permission.↩
3. Multiple libraries from several different SharePoint sites can be added.↩