

# WEB APP PART

## SHAREPOINT INTEGRATION

MAY 2017

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# WEB APP PART

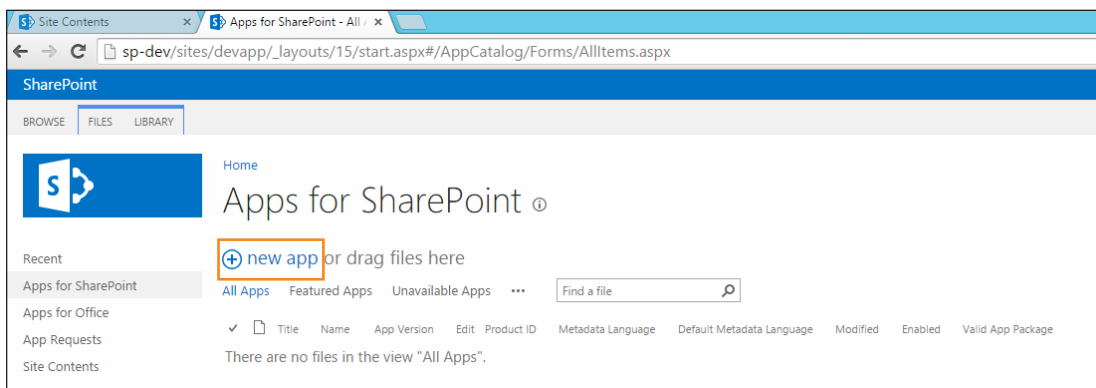
## SHAREPOINT INTEGRATION

Bring Thomson Reuters Intelligence Center™ Profile Dashboard Widgets to your firm's SharePoint® site to maximize your client and company profiles. Simply install the Thomson Reuters Intelligence Center Web App Part into your SharePoint Catalog/Library, then add the Thomson Reuters Intelligence Center Profiles into your Portal or Client Pages. Once these easy steps are completed, you will be able to customize your pages with information provided by the Thomson Reuters Intelligence Center, available to the users of your SharePoint site, without having to separately log in to the Thomson Reuters Intelligence Center.

### Installing the Intelligence Center Web App Part Into Your SharePoint Catalog/Library

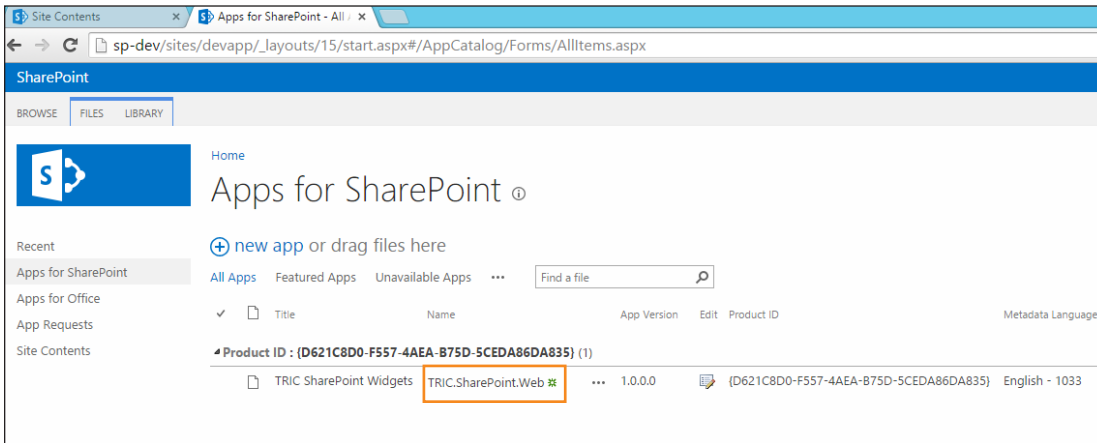
To begin the process, save the app file in a local location. To obtain the file, contact your Business Development Consultant. Follow these steps for installation:

1. Within your SharePoint setup, navigate to Apps for SharePoint and click **new app**. A dialog box will appear.



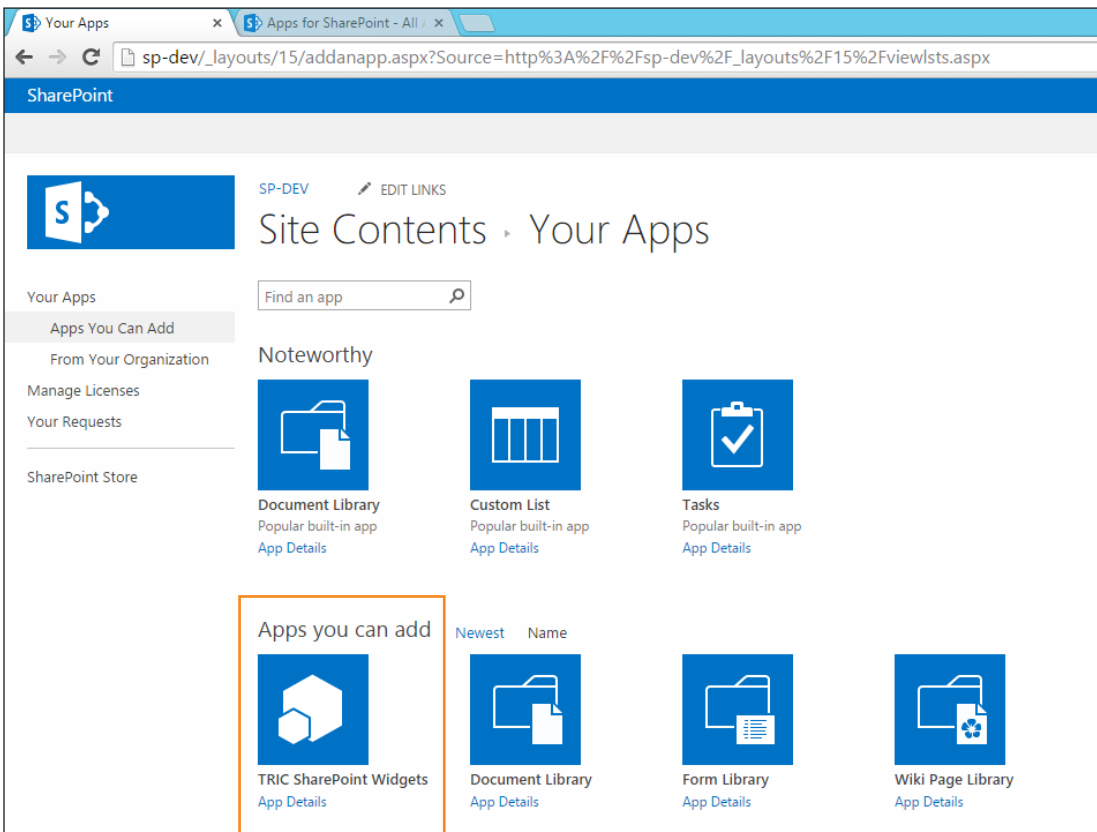
2. Using the **choose a file** button, browse to the local file location for *TRIC/SharePoint.Web\_prod\_prod.app*, which is the Thomson Reuters Intelligence Center Web App Part. Click **Open**.
3. Once the file is selected, click **OK** to begin the file upload. A new dialog box will appear indicating the progress of the upload. When complete, the display box will note a successful upload. It is recommended that the Web App be added to the "noteworthy" section, which will allow for easy access to the Web Part in SharePoint as a favorite.

4. Click **Save** to advance. The Web Part will now be available within the SharePoint App Catalog for installation to your site.

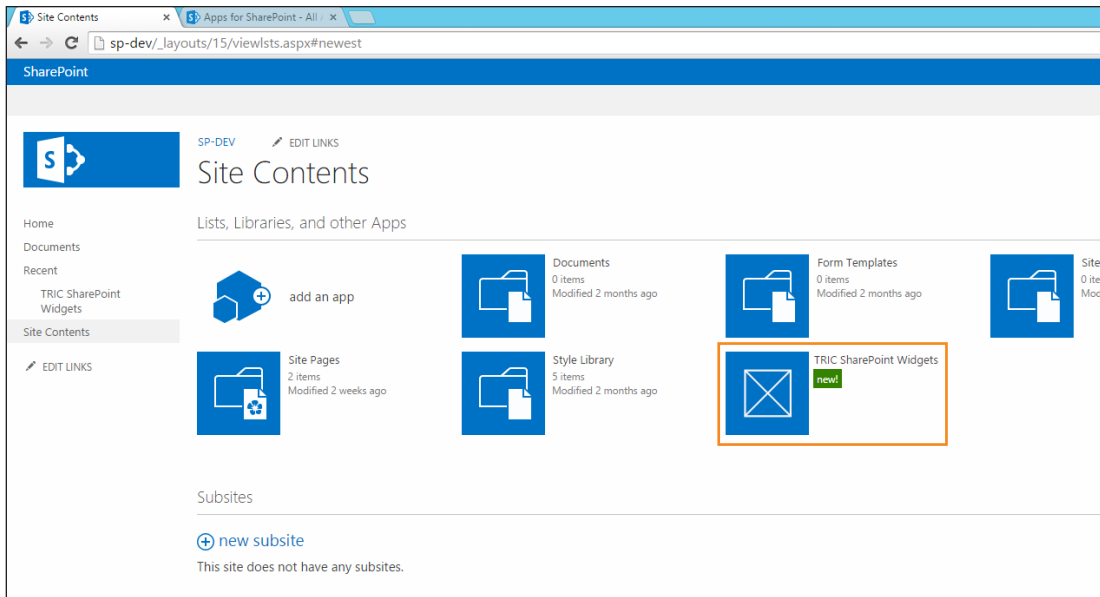


5. To add the Web App Part to your SharePoint site, navigate to the Site Contents page and click **add an app**.

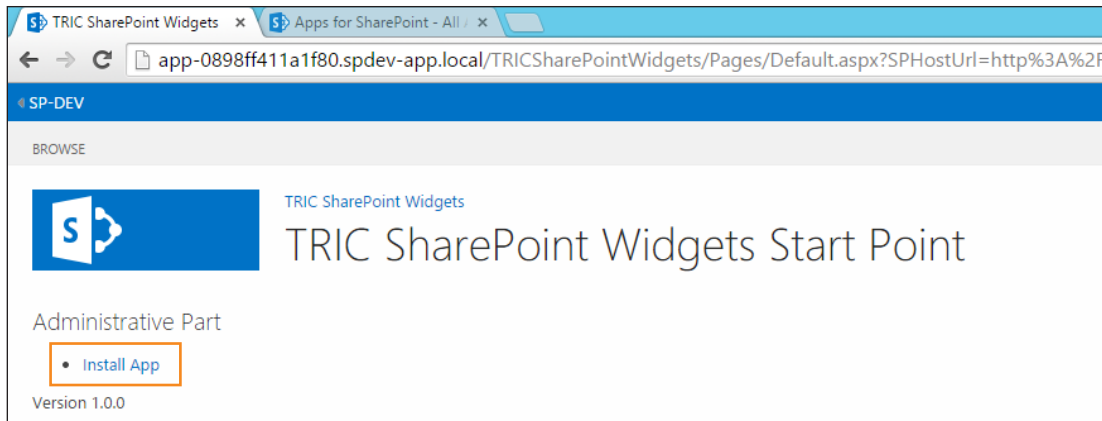
Click **TRIC SharePoint Widgets** from the Apps You Can Add section. A dialog box will appear to confirm your selection. Click **Trust it** to proceed.



- The Thomson Reuters Intelligence Web App Part will now be available to add into your site under Site Contents. From here, log in as the SharePoint Administrator (Local authentication may be required).



- Once logged in, begin the app installation process by clicking **Install App**.



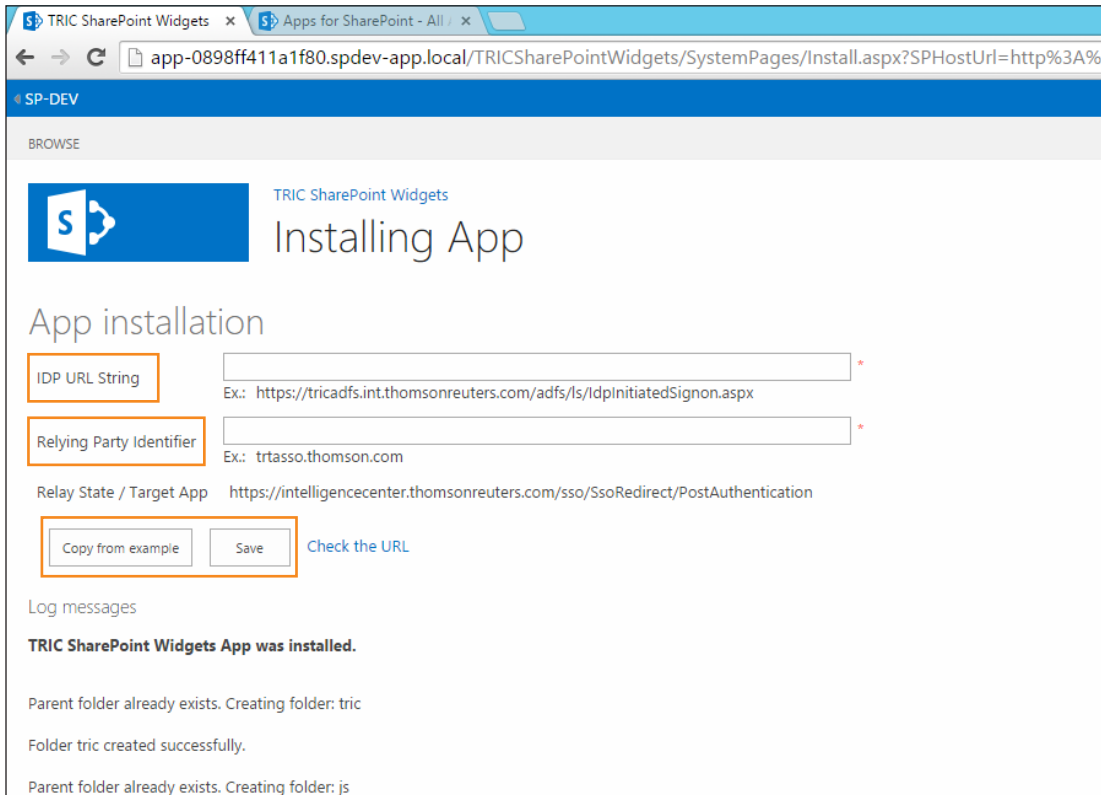
- The installation process will begin and it will be necessary to set up seamless authentication. The setup dialog box will request input for the *IDP URL String*, which will require your firm's ADFS or SAML Setup URL.

**Note:** The following information applies if prior Thomson Reuters Ping Federate ADFS or SAML Seamless Authentication for Intelligence Center has previously been completed for your firm.

The *Relying Party Identifier* is the Thomson Reuters Seamless Sign-On URL. Enter *trtasso.thomson.com*.

The *Relay State/Target App* refers to the Intelligence Center Application Location, and is preset to *https://intelligencecenter.thomsonreuters.com/sso/SsoRedirect/PostAuthentication*.

The URLs can also be added by clicking **Copy from example**, which will populate the required information. To complete installation, click **Save**.



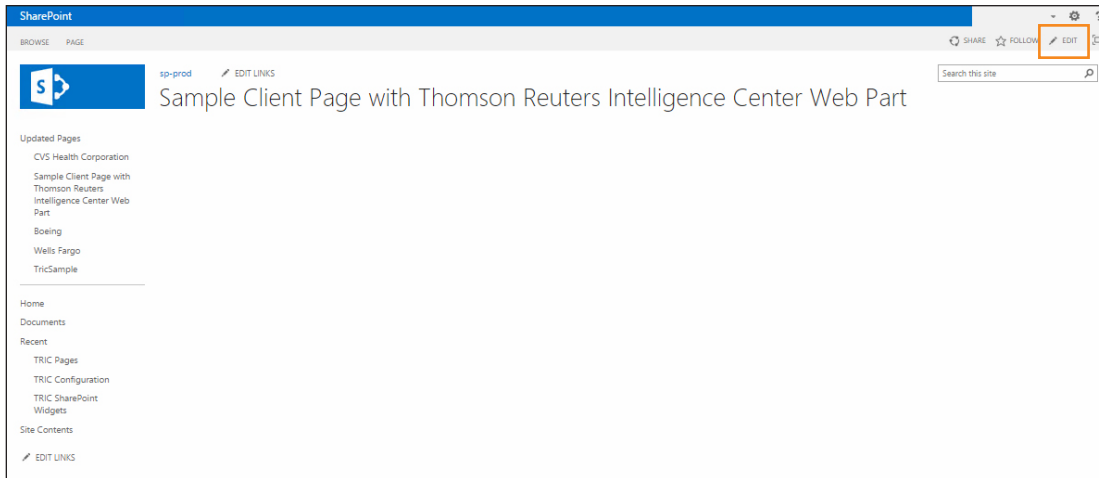
## Installing the Thomson Reuters Intelligence Center Profiles Into Your Portal or Client Pages

After you successfully install the Web App into your SharePoint site, you will be able to add Client or Industry Profiles into your Portal or Client Pages, allowing for seamless integration of Intelligence Center's data into your firm's SharePoint setup. When setting profiles up in Intelligence Center, you should share the profiles across the law firm, or "public," and the Intelligence Center Integration OnePass Sign-on credentials should be made available to the SharePoint Admin.

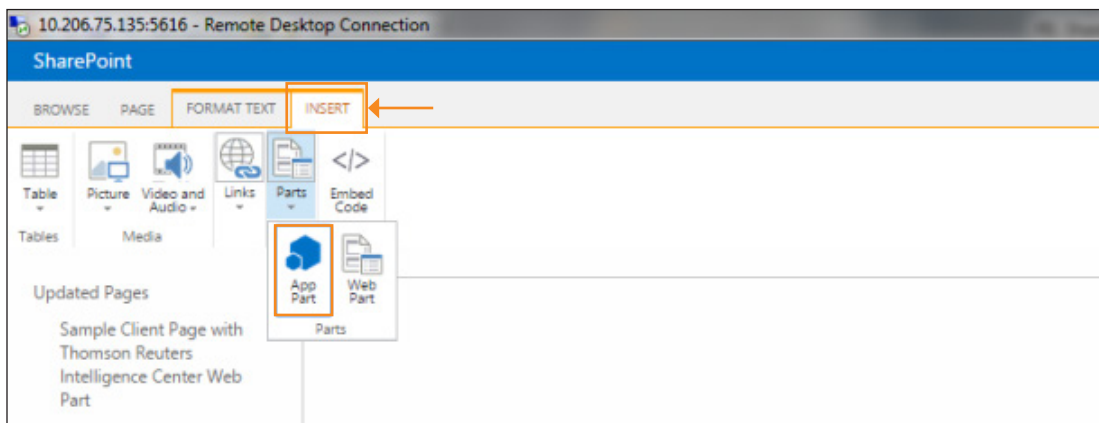
**Note:** All profiles must first be created directly in Intelligence Center and then imported into your local SharePoint.

To install Profiles, complete the following:

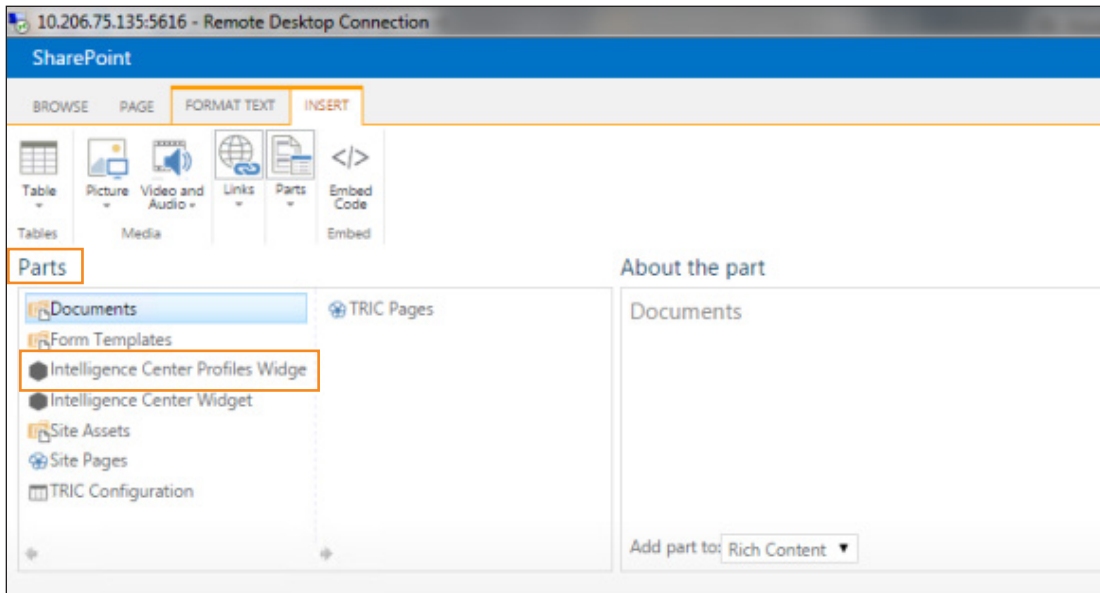
1. On the desired Client or Portal page, click **Edit** in the upper right corner.



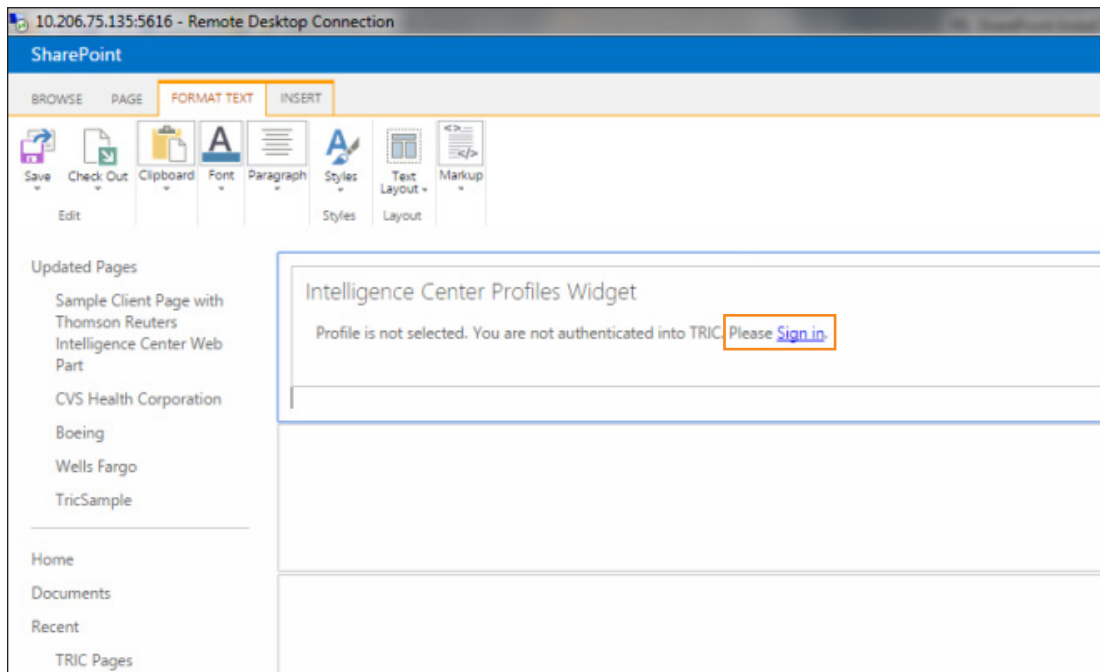
2. On the page that appears, click the **INSERT** tab and then click **App Part**.



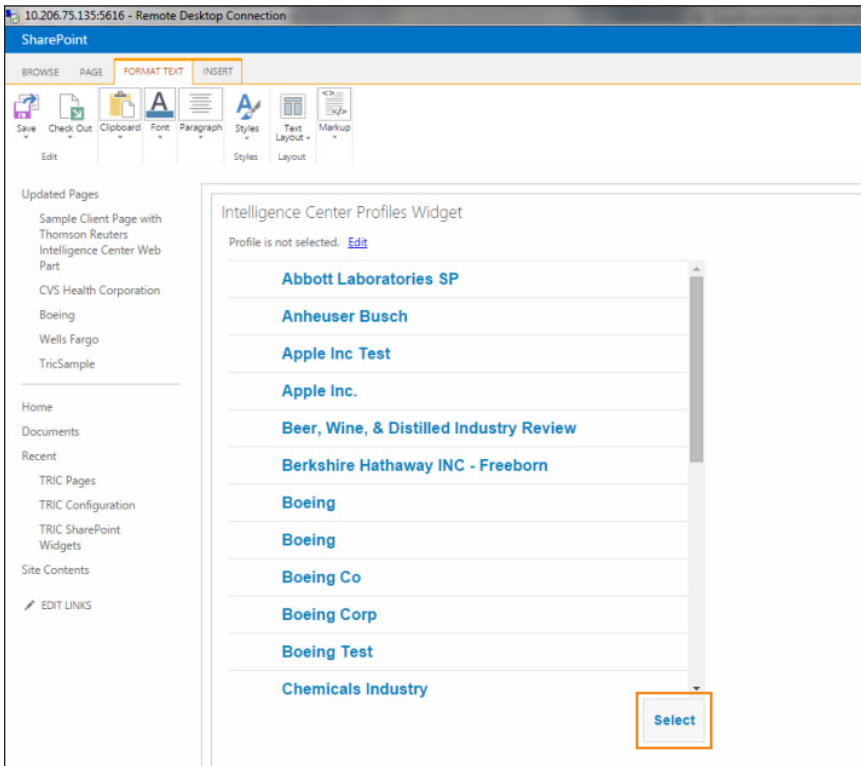
3. Locate the Parts section. Add the profile by clicking the **Intelligence Center Profiles Widget** link. This link is essential and provides precise mapping to the Intelligence Center Company or Industry Profile. Adding this link will permit automatic retrieval of data for specific Intelligence Center widgets (e.g., Litigation Activity by Juris) installed into the page. Click **Add**.



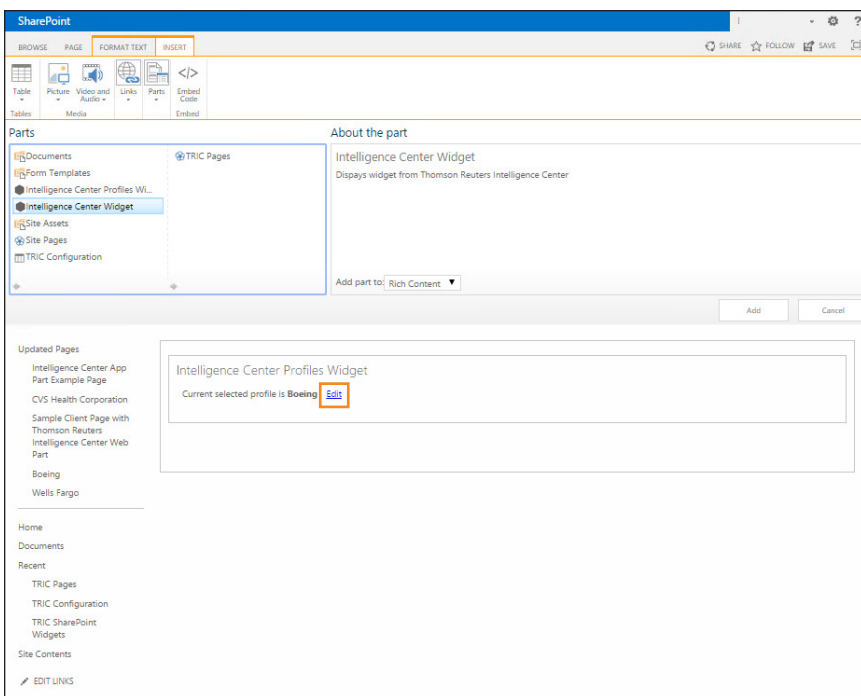
4. Authentication is required. Click **Sign In** (if required to log in to the ADFS/SAML system) and enter the Intelligence Center OnePass credentials (required only at the first log-in for SSO authentication). Click **Log In**.



- Now that authentication to Intelligence Center is complete, a list of profiles will be available to select. Navigate to the desired profile, click the profile, and click **Select**. The profile will now be selected for the particular SharePoint page.

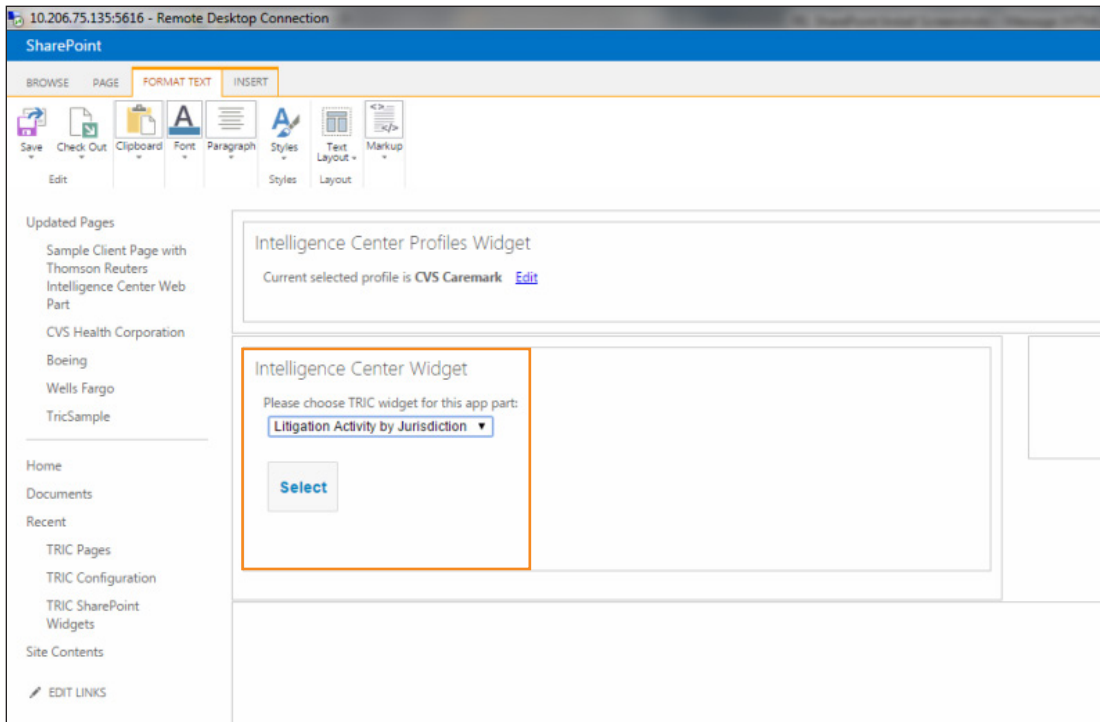


- Specific Intelligence Center Dashboard components can be added to the page. From the Parts section on the SharePoint page, click **Intelligence Center Widget** and click **Edit** in the lower right corner.





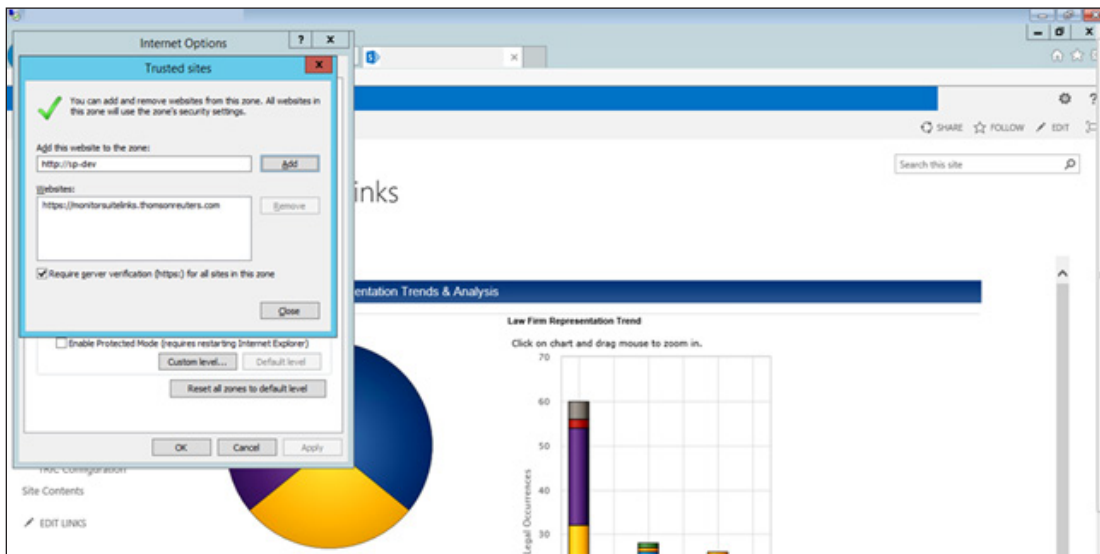
- The desired dashboard widget or specific content can now be added to the page. Select the location on the page where you want the information to appear. From the drop-down menu, select the appropriate widget. Click **Select**. The Intelligence Center content will now be available on the page.



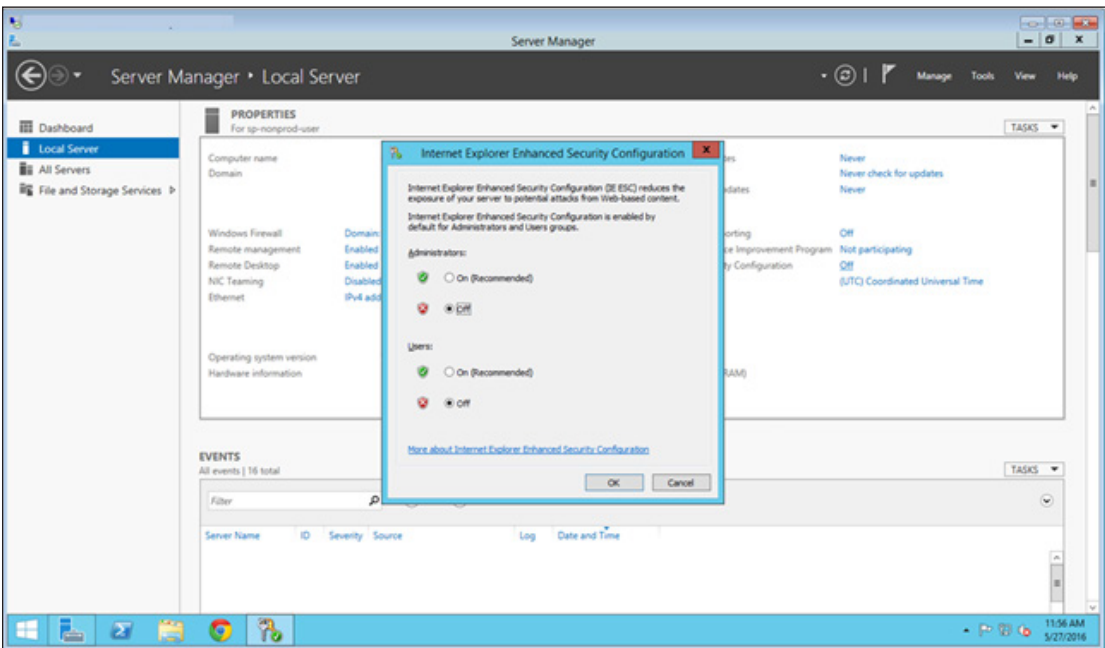
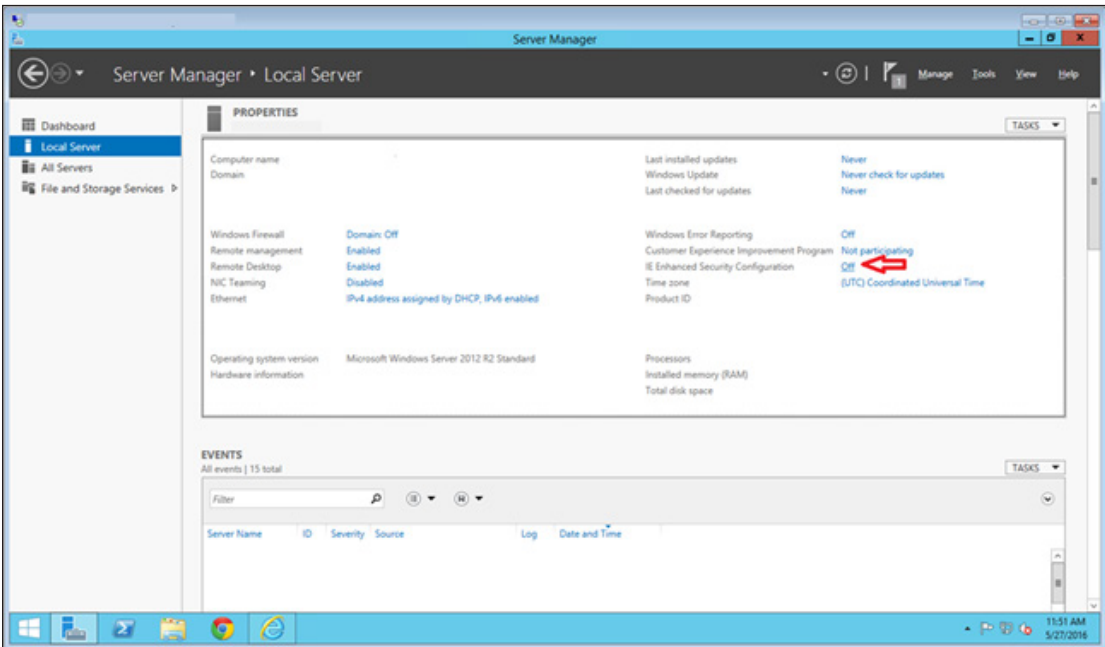
- Click **Save** to finalize the page.

### Configuring Internet Explorer Security Settings for Intelligence Center Widgets in SharePoint

- Add <https://intelligencecenter.thomsonreuters.com> and your SharePoint site URL to the trusted sites for Internet Explorer. Alternatively, you can add [https://\\*.thomsonreuters.com](https://*.thomsonreuters.com) to the trusted sites.

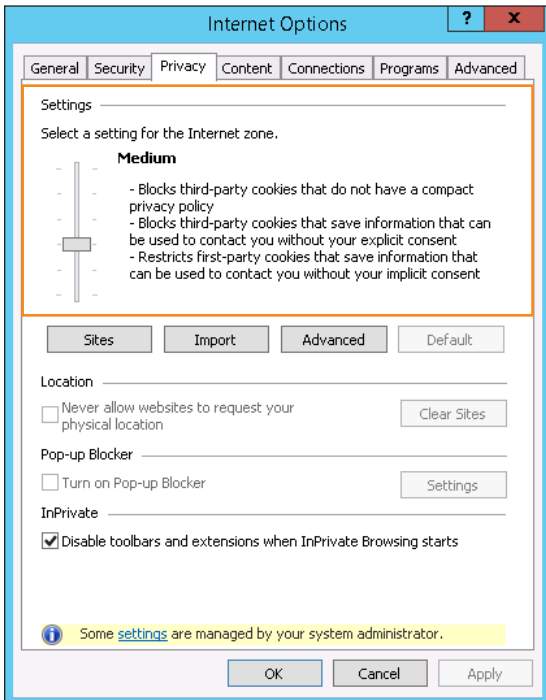


- If you are browsing from Windows Server based OS, turn off the *IE Enhanced Security Configuration*.

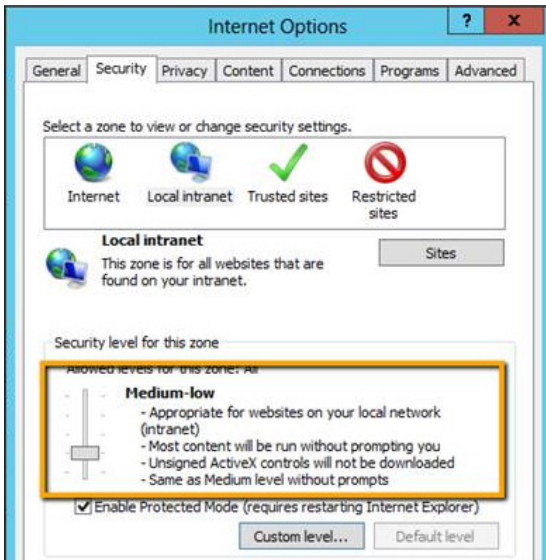


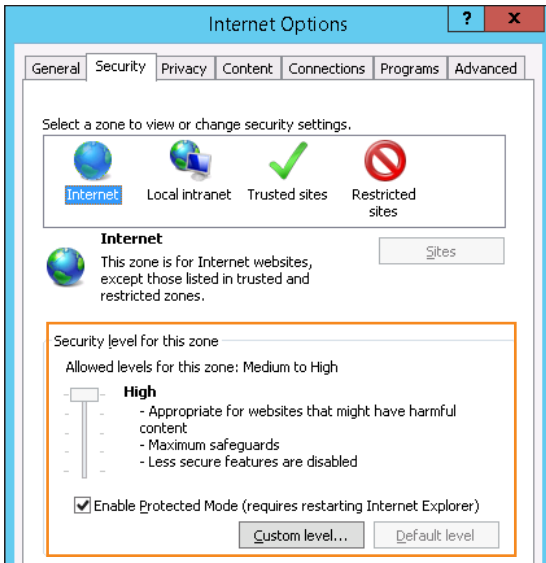
- Restart your browser.

4. Set Privacy settings to *Medium* or lower.

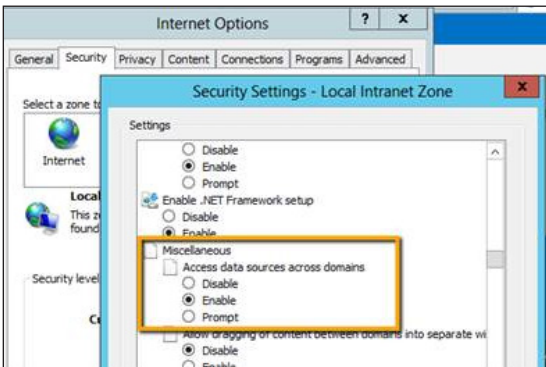


5. Set the Security settings for the local intranet as *Medium-low* or lower and for the internet zone as *High* and then make the following changes:



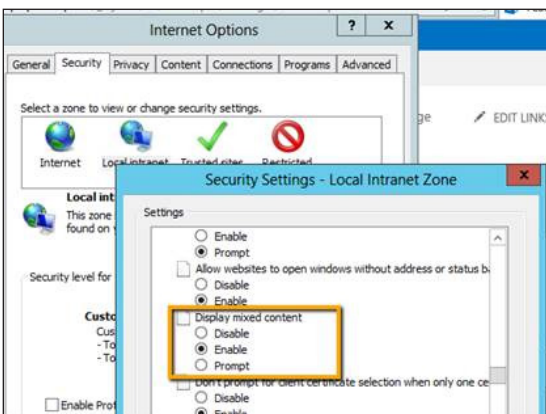


a. Make sure the *Access data sources across domains* setting is set to *Enable*.



b. Set the *Display mixed content* setting to *Enable*.

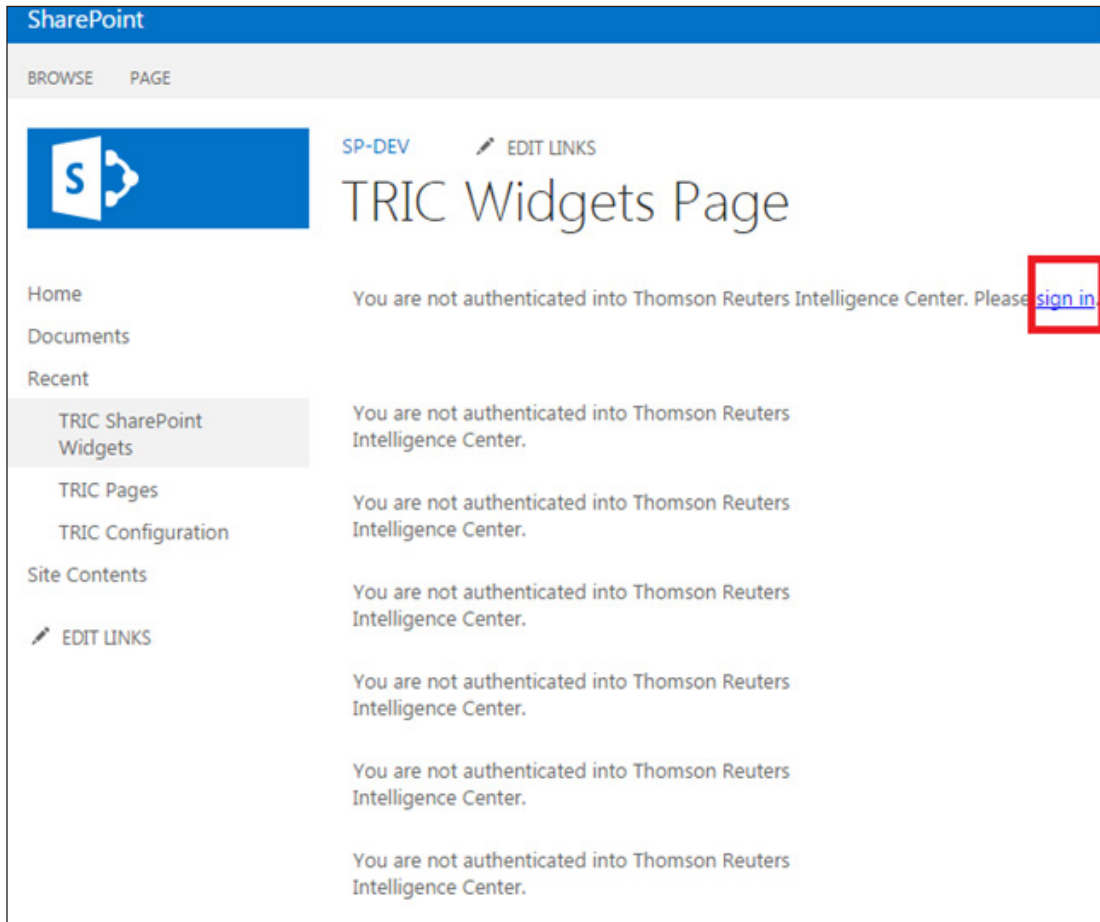
Note: This is only required if SharePoint is running http and not https.



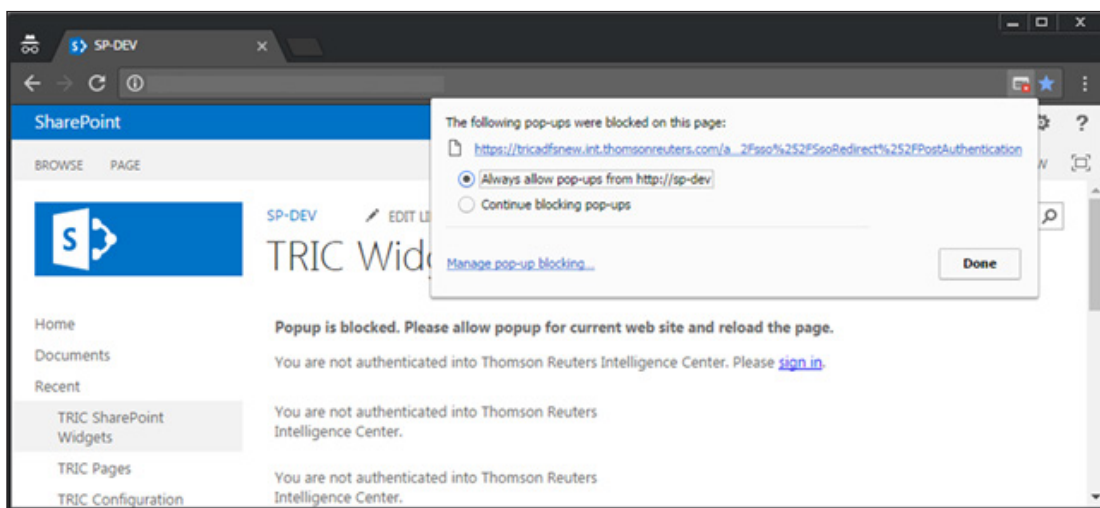
6. Restart your browser.

**Common Instructions for All Browsers**

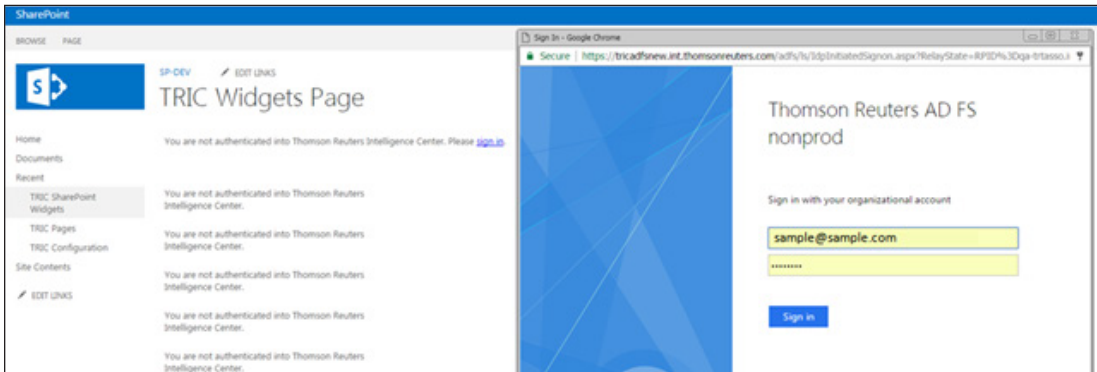
1. Wait until the page is loaded and then click **Sign In**.



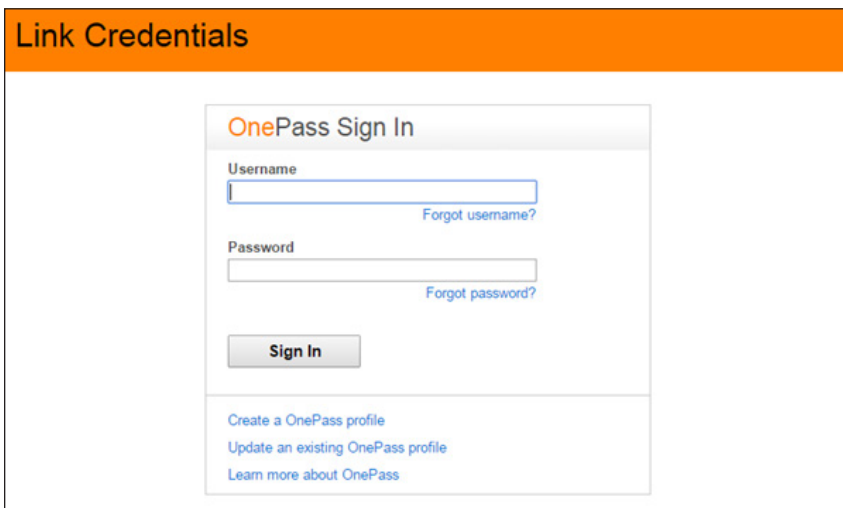
2. Ensure that your browser allows popups for the SharePoint site.



3. Reload the page and click **Sign In** again.
4. Enter your domain credentials and then click **Sign In**.



5. Link your domain account with your OnePass account (first time login only). Enter your OnePass credentials and click **Sign In**.

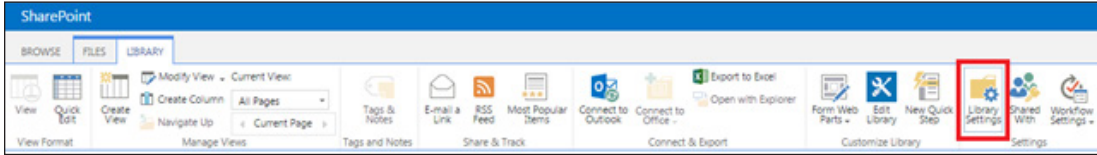


6. The popup window is automatically closed and the SharePoint web parts are then reloaded.
7. If you still see a message indicating *You are not authenticated into Thomson Reuters Intelligence Center*, reload the SharePoint page.

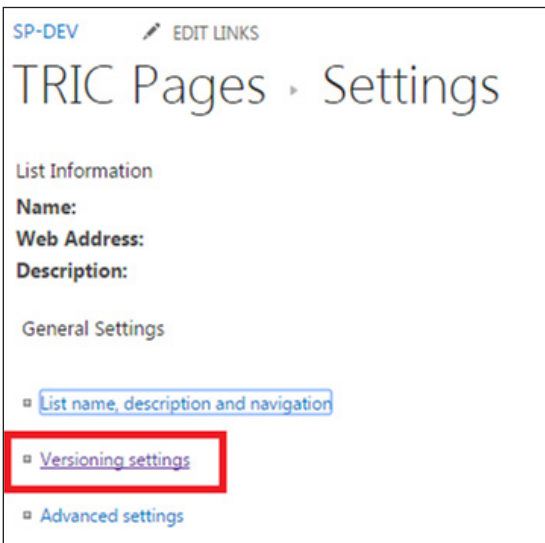
### Troubleshooting Tips

If a SharePoint page which contains Intelligence Center widgets is placed into the SharePoint library, navigate to the following setting: Library settings --> Versioning settings --> Require check out. This setting should be set to *no/false*.

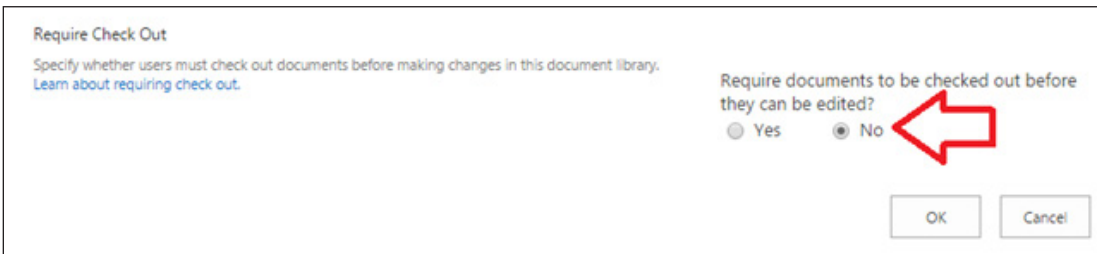
Library settings:



Versioning settings:



Require check out settings:



Otherwise, each change to a page with Intelligence Center widgets (profile changes, widget name change, etc.) will require the SharePoint page to be checked out.

#### LOOKING FOR MORE INFORMATION?

Monitor Suite is available on the Web at [monitorsuite.thomsonreuters.com](http://monitorsuite.thomsonreuters.com).

For assistance using Monitor Suite, call 1-877-347-6360.

For free reference materials, visit [legalsolutions.com/law-products/support/monitor-suite](http://legalsolutions.com/law-products/support/monitor-suite)

