

TechTip: Setting up Microsoft Entra ID for synchronization with the Eplan Cloud

Preconditions

- To synchronize Microsoft Entra ID groups, you need the P1 licenses for your Microsoft Entra ID.
- You have an Eplan Cloud company organization.
- You have access to the user management in your Eplan Cloud company organization.
[Read more](#)
- In the Eplan Cloud, create a personal access token (PAT) for your company organization and select the "User management" product. [Read more](#)

Setting up a company application

1. Create a company application with a name of your choice in Microsoft Entra ID. Eplan recommends the name "Eplan ProvisioningService".
You can connect to more than one Eplan Cloud company organization by creating further company applications with different names.
2. In the settings of Microsoft Entra ID, allow other applications that are not located in the gallery of Microsoft Entra ID.
3. Set your company application to the **automatic** provisioning mode.
Provide the following information:
 - Tenant URL: <https://api.Eplan.com/organization-scim/v1.0>
 - "Secret token": Eplan Cloud personal access token (PAT). [Read more](#)
4. Test the connection and save the details.

Attribute assignment

The following attributes must exist in the attribute assignment list:

- userName
- externalId
- active

! Recommendation: To avoid problems during the synchronization, do not delete attributes from the attribute assignment list.

Editing the attribute assignment "externalId" in Microsoft Entra ID (Provisioning Azure Active Directory users)

1. Edit the "externalId" attribute:

Mapping type	→	Direct
Source attributes	→	objectId
Default value if null	→	<empty>
Target attribute	→	externalId
Match objects using this attribute	→	Yes
Matching precedence	→	2
Apply this mapping	→	Always

2. Save your changes.

⇒ You do not have to make further changes.

Setting up the scope of synchronization

Set up the scope of synchronization before the synchronization.

Select whether **all** or only **assigned** users and groups may be used for synchronization with your Eplan Cloud company organization. If the scope of synchronization is limited to assigned users and groups, assign them to the application next.

Synchronization

Important:

- A value must be specified for the display name in Microsoft Entra ID.
- The data transfer is limited to the initial provision. This means that no data of a user is transferred to the Eplan Cloud during a further synchronization.
- You have set up the scope of synchronization.


The following data are synchronized with the Eplan Cloud:

User	First name
	Last name
	Display name
	UPN
Groups	Group name

Notes on synchronization

- During synchronization, the group name in Microsoft Entra ID becomes the team name in the Eplan Cloud user management.
- The team name and the short form are created automatically and cannot be changed manually in the Eplan Cloud user management.
- The description of the Microsoft Entra ID group is not synchronized in the Eplan Cloud user management and remains empty. The description cannot be edited manually in the user management.
- If a user or group is removed from Microsoft Entra ID or a user or group is removed from the scope of synchronization, the same users or group are removed from the Eplan Cloud.

Changes in the Eplan Cloud user management

- Administrators of the Eplan Cloud user management are notified about synchronization, such as about the addition of users or the creation of teams. These notifications are removed after 72 hours.
- Users or teams that are managed in Microsoft Entra ID can only be edited or deleted in Microsoft Entra ID.
- Users or teams that are managed in Microsoft Entra ID are marked with the icon  in the Eplan Cloud user management.

Synchronization of the users in the Eplan Cloud

The procedure described applies both to users who are part of the scope of synchronization at the beginning and to users who are added to the scope of synchronization later.

- Users who are already signed in to the Eplan Cloud with your Microsoft account are detected automatically and will be synchronized with Microsoft Entra ID in the future.
- After the synchronization, users who are not yet signed in to the Eplan Cloud with their Microsoft account receive an invitation to the Eplan Cloud via e-mail. If the user clicks the invitation link and follows the instructions, they sign in completely to the Eplan Cloud and become a member of the company organization.