

# Set-up guide for administrators

Approve EntitleWorks for your company once, connect your document systems, and keep control of access and spend.



# Contents

|   |                                               |   |
|---|-----------------------------------------------|---|
| 1 | Two roles, often two people                   | 2 |
| 2 | Checklist                                     | 2 |
| 3 | Approve EntitleWorks in Microsoft Entra (IT)  | 3 |
| 4 | What EntitleWorks asks Microsoft for (IT)     | 4 |
| 5 | Connect Procore (company admin)               | 5 |
| 6 | Connect Aconex (company admin)                | 5 |
| 7 | TeamBinder and other systems (company admin)  | 5 |
| 8 | Credits, people and time bars (company admin) | 6 |
| 9 | Troubleshooting for IT                        | 6 |

For IT administrators (Microsoft Entra) and EntitleWorks company admins. These can be different people; each section says who it is for.

# 1 Two roles, often two people

| Role             | Who                                                    | What they do                                                                                                              |
|------------------|--------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| IT administrator | Someone who manages your Microsoft 365 / Entra tenant. | Approves EntitleWorks once so staff can sign in. Can switch it off at any time.                                           |
| Company admin    | Usually a commercial or contracts lead.                | Connects Procore and Aconex for the company, buys extra credits, and is told about time bars that are about to be missed. |

Tell us who your company admin is at [han@entitleworks.ai](mailto:han@entitleworks.ai) and we will set them up. A company admin needs no Microsoft admin rights.

[Back to contents](#)

## 2 Checklist

- ☐ **IT:** approve EntitleWorks in Microsoft Entra (section 3).
- ☐ **IT:** if your tenant requires assignment, assign the people who will use it (section 3).
- ☐ **Company admin:** connect Procore and/or Aconex, if you use them (sections 5 and 6).
- ☐ **Company admin:** share the project forwarding addresses for anything else, such as TeamBinder (section 7).
- ☐ **Everyone:** send staff the user guide.

[Back to contents](#)

### 3 Approve EntitleWorks in Microsoft Entra (IT)

EntitleWorks signs people in with their Microsoft work account. Many tenants only let administrators approve new apps; if yours does, staff see a message asking for IT approval until this is done. It takes about two minutes and covers everyone.

**Option A: one link.** Signed in as a Global Administrator, Cloud Application Administrator or Application Administrator, open the link below and choose **Accept**.

[https://login.microsoftonline.com/organizations/adminconsent?client\\_id=82d21b7e-60d4-4543-ba06-1b288c2c7c16](https://login.microsoftonline.com/organizations/adminconsent?client_id=82d21b7e-60d4-4543-ba06-1b288c2c7c16)

**Option B: Entra admin centre.**

- 1 Go to **Microsoft Entra admin centre** → **Identity** → **Applications** → **Enterprise applications**.
- 2 Search for **EntitleWorks** (application ID 82d21b7e-60d4-4543-ba06-1b288c2c7c16). It is listed once anyone in your company has tried to sign in.
- 3 Open **Permissions** and choose **Grant admin consent** for your organisation.
- 4 Under **Properties**, check that **Enabled for users to sign in** is Yes. If **Assignment required** is Yes, assign the people or group who will use EntitleWorks under **Users and groups**.

#### **If approval fails with “already exists” (AADSTS650051)**

An older EntitleWorks entry is still in your directory. Use Option B on the existing entry. If you deleted it recently, wait 15 minutes before trying Option A again.

[Back to contents](#)

## 4 What EntitleWorks asks Microsoft for (IT)

All permissions are **delegated**: EntitleWorks acts as the signed-in person and can only reach what that person can already reach. There are no application (company-wide) permissions, and nothing is ever written to Microsoft 365.

| Permission                                              | Why                                                                   | When                                                     |
|---------------------------------------------------------|-----------------------------------------------------------------------|----------------------------------------------------------|
| Sign in and read basic profile (openid, profile, email) | To identify the person signing in.                                    | Every sign-in.                                           |
| Files.Read.All                                          | Pick contracts and records from the person's OneDrive and SharePoint. | Only when that person chooses Connect for Microsoft 365. |
| Sites.Read.All                                          | Browse the SharePoint sites the person can open.                      | Only when that person connects Microsoft 365.            |
| Mail.Read                                               | Read the Outlook folder the person picks for automatic notices.       | Only when that person connects Microsoft 365.            |
| offline_access                                          | Keep the connection working overnight without signing in again.       | Only when that person connects Microsoft 365.            |

**Switching it off.** In Enterprise applications → EntitleWorks → Properties, set **Enabled for users to sign in** to No. Access stops at once. Each person can also disconnect in EntitleWorks at any time.

**Where data is held.** EntitleWorks runs on Microsoft Azure in the Australia East region. Documents are analysed by Anthropic's Claude models; Anthropic does not train on business customers' data by default and deletes it within 30 days. Connection keys are encrypted. Deleting a piece of work erases its files at once; database backups roll off within 14 days.

[Back to contents](#)

## 5 Connect Procore (company admin)

Procore lets an app read a company's data only once a Procore company administrator installs it. You do this once; each person then connects in one click.

- 1 In Procore, open **Company Tools** → **Admin** → **App Management**.
- 2 Choose **Install App** → **Install Custom App**.
- 3 Enter the **App Version ID** we send you, then choose **Install**.
- 4 Each person then goes to **Settings** → **Connected systems** → Procore → **Connect** and signs in to Procore.

EntitleWorks sees only the projects and tools each person can see in Procore, and only reads.

[Back to contents](#)

## 6 Connect Aconex (company admin)

Oracle asks each customer to register the connection. It takes your Aconex organisation administrator about 10 minutes, at no cost.

- 1 In Aconex, register an OAuth client called EntitleWorks of the type **Web Server Application**. Oracle recommends the **Early Access** environment first.
- 2 Use the redirect address shown in EntitleWorks under **Settings** → **Connect your company's systems** → **Aconex**.
- 3 In that same place, paste the client ID and client secret and save. Do not email them.
- 4 Each person then goes to **Connected systems** → Aconex → **Connect** and signs in once.

Oracle's guide: [Create an OAuth client \(Oracle Aconex Help\)](#).

[Back to contents](#)

## 7 TeamBinder and other systems (company admin)

TeamBinder and many other systems offer no connection for documents. Each EntitleWorks project instead has its own address, **files+code@entitleworks.ai**. Copy it on transmittals or forward letters to it; they are read at the project's cut-off.

- Mail is accepted only from your company's email domain, or the project owner's own address.
- Many Microsoft 365 tenants block *automatic* forwarding to outside addresses. Forwarding by hand and copying the address on outgoing mail are not affected.
- If your mail gateway uses an allow-list for outbound mail, add **entitleworks.ai**.

[Back to contents](#)

## 8 Credits, people and time bars (company admin)

- **Extra credits.** Only company admins can buy top-ups, in **Settings** → **Your plan** . Top-up credits do not expire. Other staff see a note asking them to contact you.
- **Time bars.** From one day before any notice deadline, and if it becomes overdue, company admins get an email naming the notice and who owns it.
- **New starters and leavers.** Email [han@entitleworks.ai](mailto:han@entitleworks.ai). Switching someone's Microsoft account off also stops them signing in to EntitleWorks.

[Back to contents](#)

## 9 Troubleshooting for IT

| Code or message                              | Meaning and fix                                                                                                   |
|----------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| AADSTS65001                                  | Consent is needed and users cannot give it. Approve EntitleWorks (section 3).                                     |
| AADSTS650051                                 | An EntitleWorks entry already exists. Grant consent on the existing enterprise application (section 3, Option B). |
| AADSTS90094 / 90095                          | Your tenant requires admin approval for this app. Approve EntitleWorks (section 3).                               |
| AADSTS50105                                  | Assignment is required and the person is not assigned. Add them under Users and groups.                           |
| <i>Please sign in with your work account</i> | A personal Microsoft account was used. Use the company account.                                                   |

Questions about security or data handling: [han@entitleworks.ai](mailto:han@entitleworks.ai).

[Back to contents](#)

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EntitleWorks gives commercial decision support, not legal advice. Screens and labels may change as the product improves; this guide was issued October 2026.