



inoglic

User Manual

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Introduction

SharePoint Security Sync is a comprehensive solution for integrating Microsoft Dynamics 365 CRM and Power Apps with SharePoint for document management. It seamlessly syncs security privileges from Dynamics 365 CRM to Sharepoint, thereby ensuring secure and reliable access to confidential documents stored in SharePoint.

Salient Features:

- Real time sync of security permission
- Replicate Association and Dissociation of security role to/from a user/team in Dynamics 365 CRM with SharePoint
- Replicate sharing of record with another user/team in Dynamics 365 CRM with SharePoint
- Assign record to another user/team in Dynamics 365 CRM and reflect it in SharePoint simultaneously
- Add/Remove members to/from team in Dynamics 365 CRM and replicate it in SharePoint simultaneously
- Sync deletion of security role in Dynamics 365 CRM with SharePoint
- Supports all types of entities
- Multiple files and folders can be dragged and dropped at one time to SharePoint
- Single as well as multiple files or folders can be uploaded
- Users can download documents from SharePoint
- Email with file's link or file as attachment can be sent
- Files/Folders can be renamed
- Bulk copy/move Note/Activities/Sales Literature Attachments to SharePoint

- Sharable links of files/folders can be created which can also be copied for external use
- Deep search can be done for the entered keyword
- Access control of user actions on Attach2Dynamics UI
- Delete files from SharePoint
- View files before downloading
- Support for configuring multiple SharePoint connectors
- Support for single sign-on
- Support for setting default from, to, cc and bcc for an email using Email Configuration
- Support for hierarchy structure to store attachments/documents in SharePoint
- Seamless DocuSign integration to electronically sign documents stored in SharePoint
- Support to directly open record folder present on SharePoint site from the UI
- Support to create customized folder structure in SharePoint

Available for :-

Microsoft Dynamics 365 CRM: Microsoft Dynamics 365 CRM 9.1, Dataverse (Power Apps).

Deployment: Online

SharePoint: Online

Disclaimer: *In the process of synchronizing security between Dynamics 365 CRM and SharePoint, the app breaks the inheritance of permission on the folder in SharePoint. If you ever wish to restore the original state of security on the folder, it needs to be done manually and **Inogic does not take any responsibility for recovering it to the original state.** It is highly recommended that you create backups and restore points, test the system in a test environment and take backup of original systems before moving it to the production environment.*

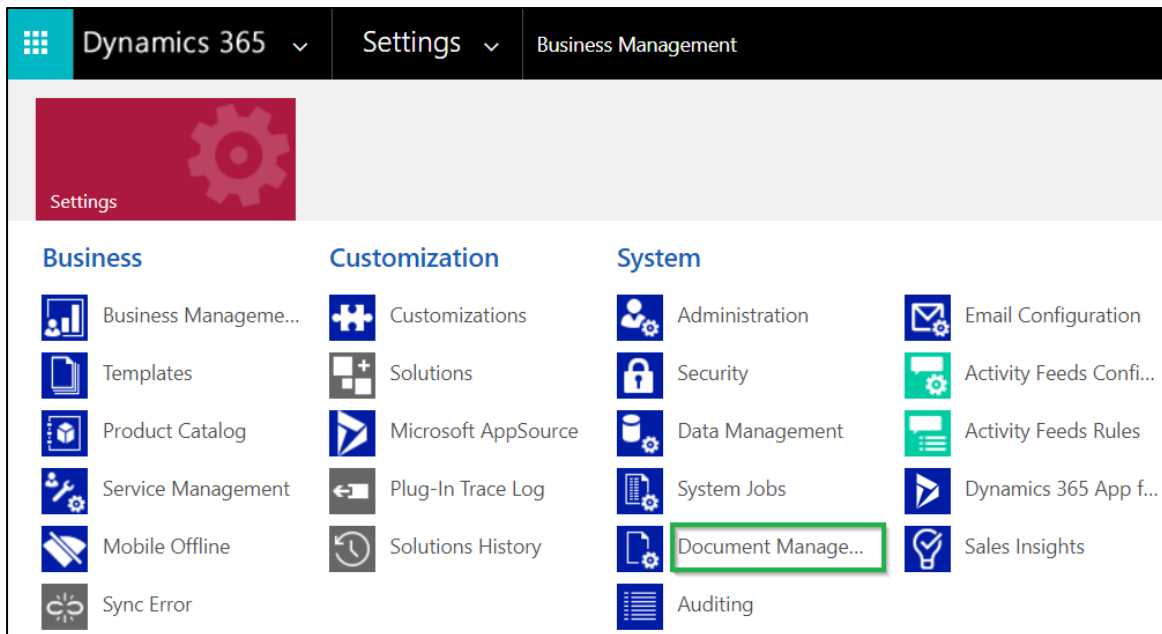
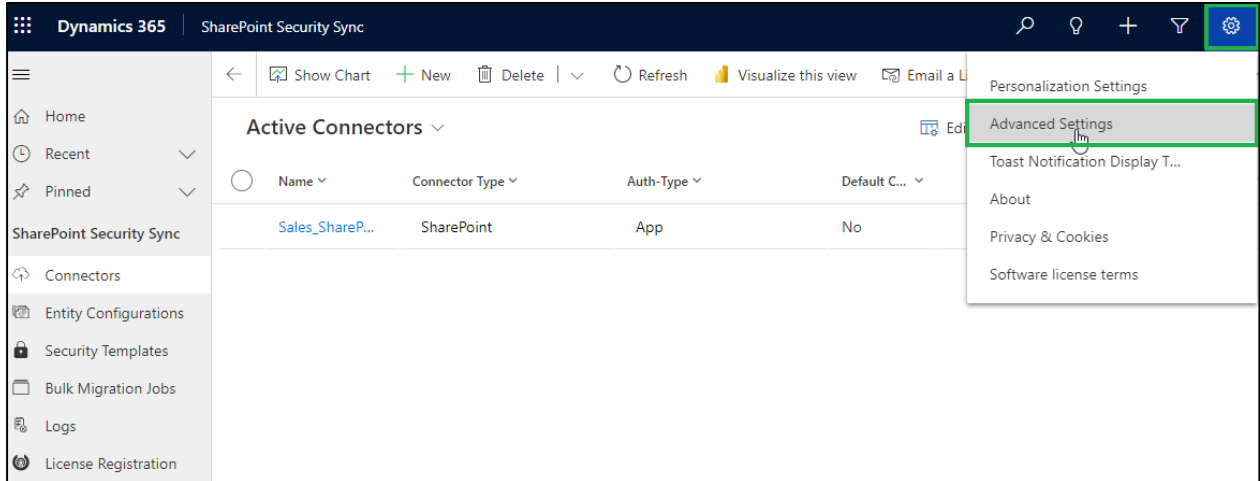
Prerequisites

Before you start using SharePoint Security Sync solution, it is necessary to enable server-based SharePoint integration for your Dynamics 365 CRM environment.

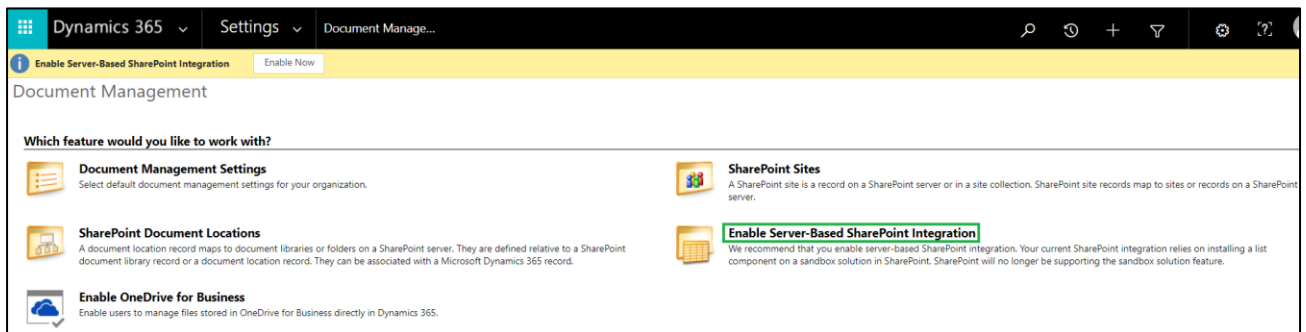
To do this, follow the steps given below:

- 1) Navigate to **Advanced Settings → Settings → Document Management.**

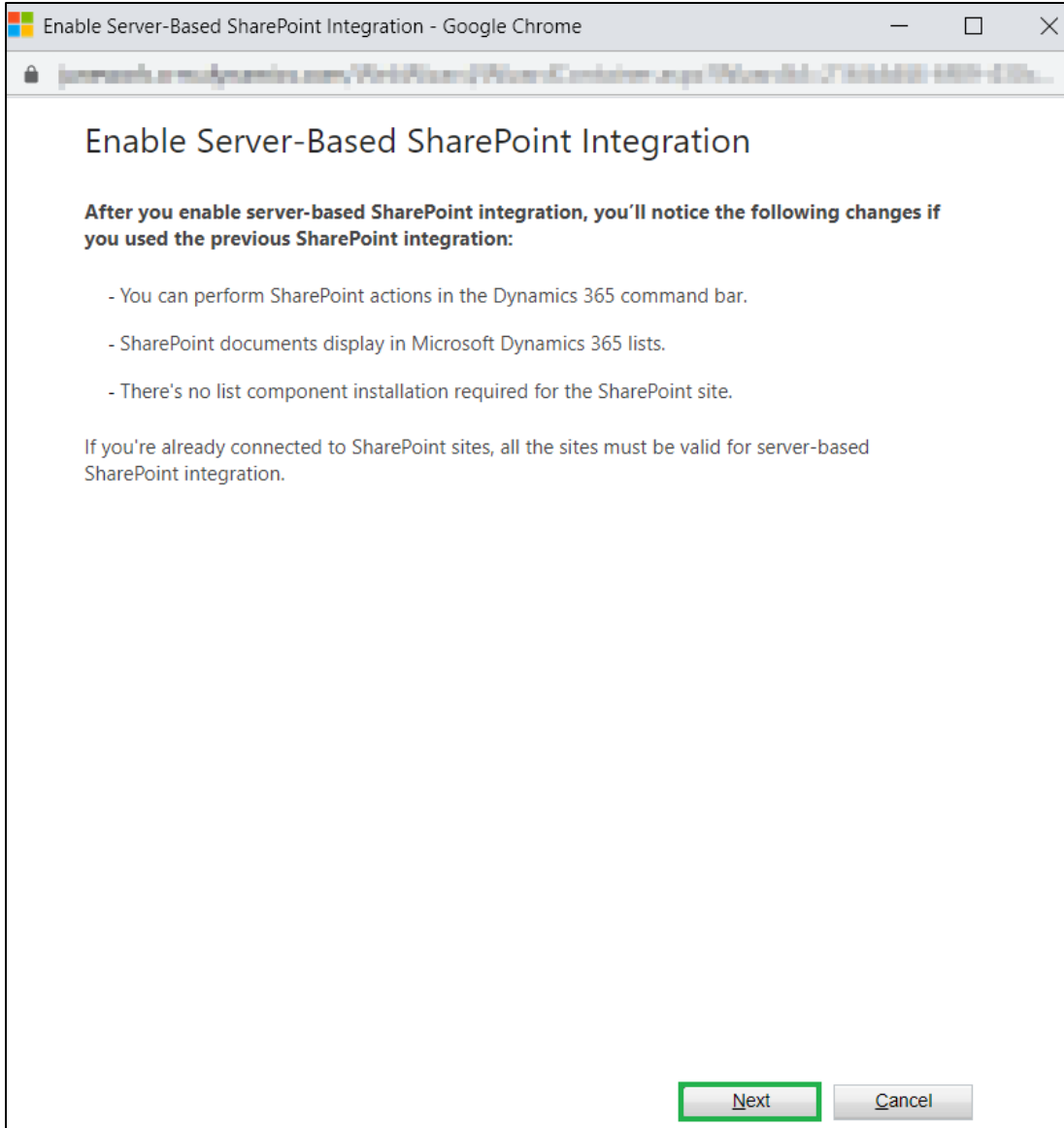
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2) Go to 'Enable Sever-Based Sharepoint Integration'.



3) Click on Next.



4) Now, select the **location of SharePoint site** and click on **Next**.

Enable Server-Based SharePoint Integration

Define Deployment → Prepare Sites → Validate Sites

Server-based SharePoint integration can connect to online or on-premises SharePoint sites. If multiple SharePoint sites are used, all sites must be of the same deployment type.

Select where your SharePoint sites are located:

Online
 On-Premises

All SharePoint Online sites must be in the same tenant as Microsoft Dynamics 365.

5) Now, enter the **URL of SharePoint site** that you want to use → Click on **Next**.

Enable Server-Based SharePoint Integration

Define Deployment **Prepare Sites** Validate Sites

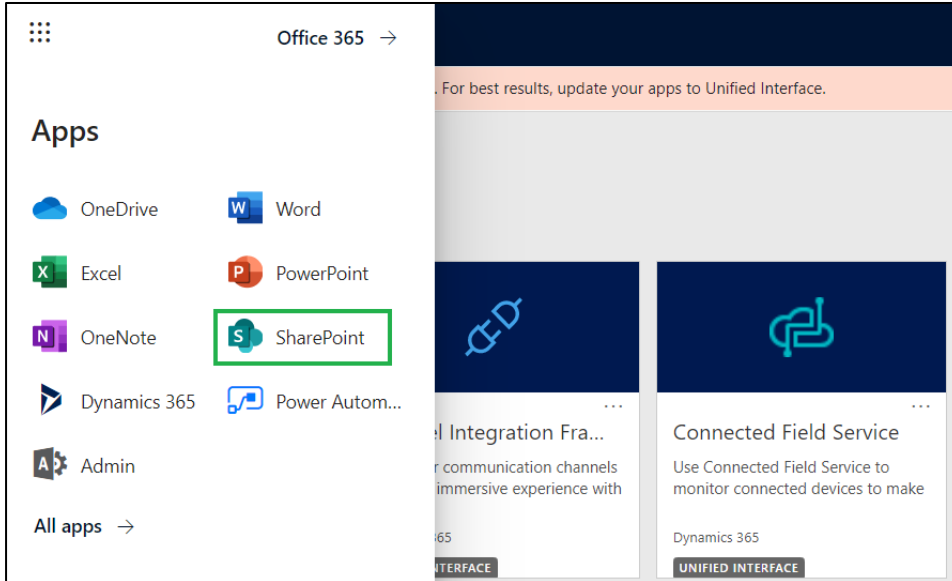
No additional setup requirements are required for connecting Dynamics 365 Online to SharePoint Online.

Enter the URL of the SharePoint site for use with server-based integration.

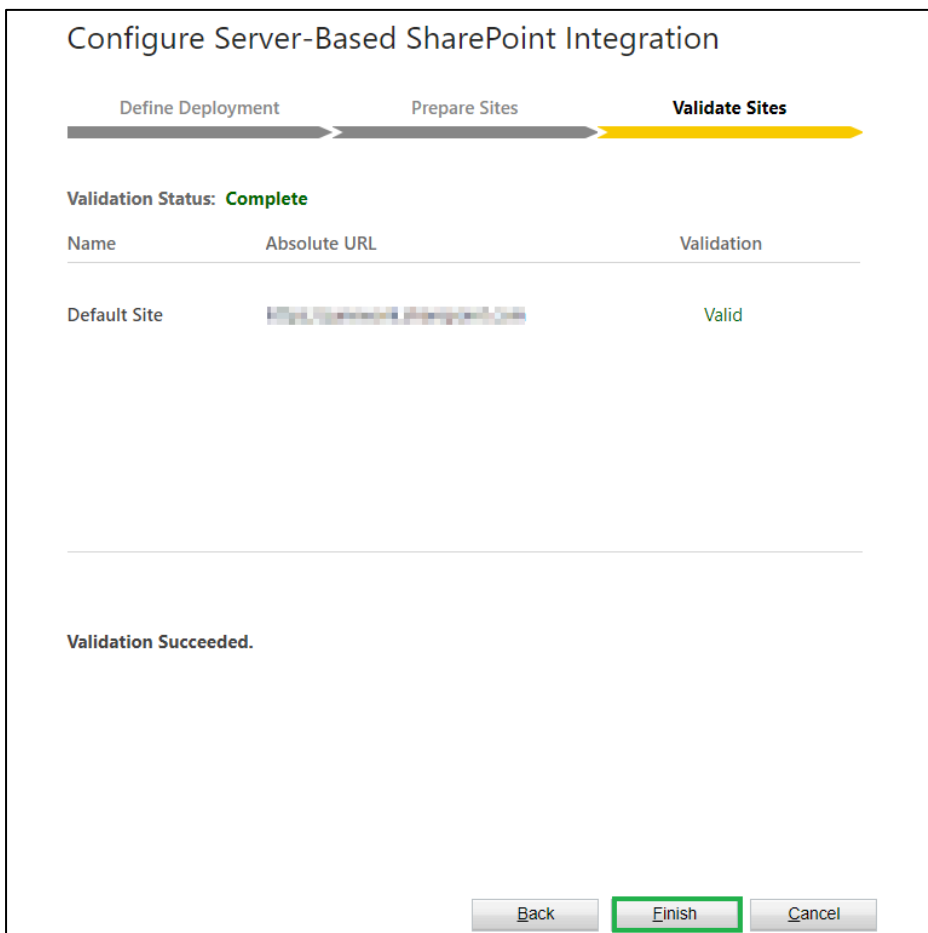
URL

6) You can get the URL of SharePoint site from here.

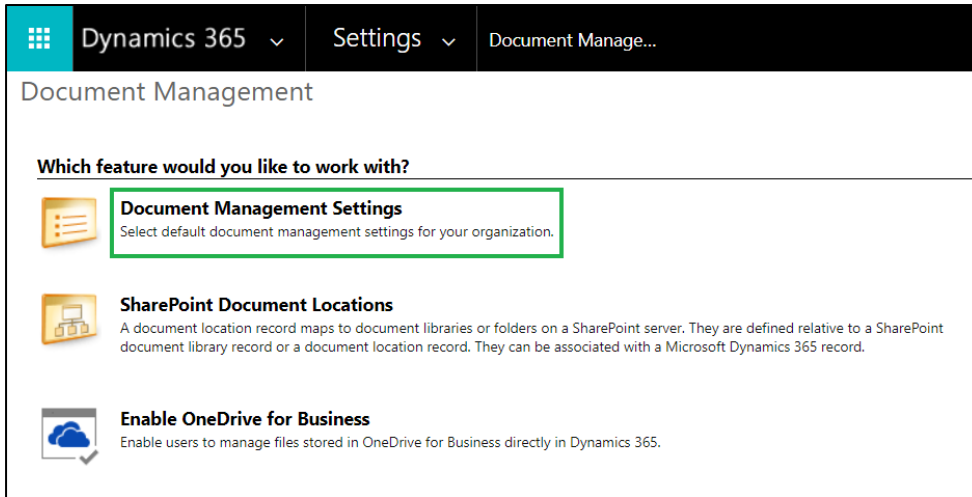
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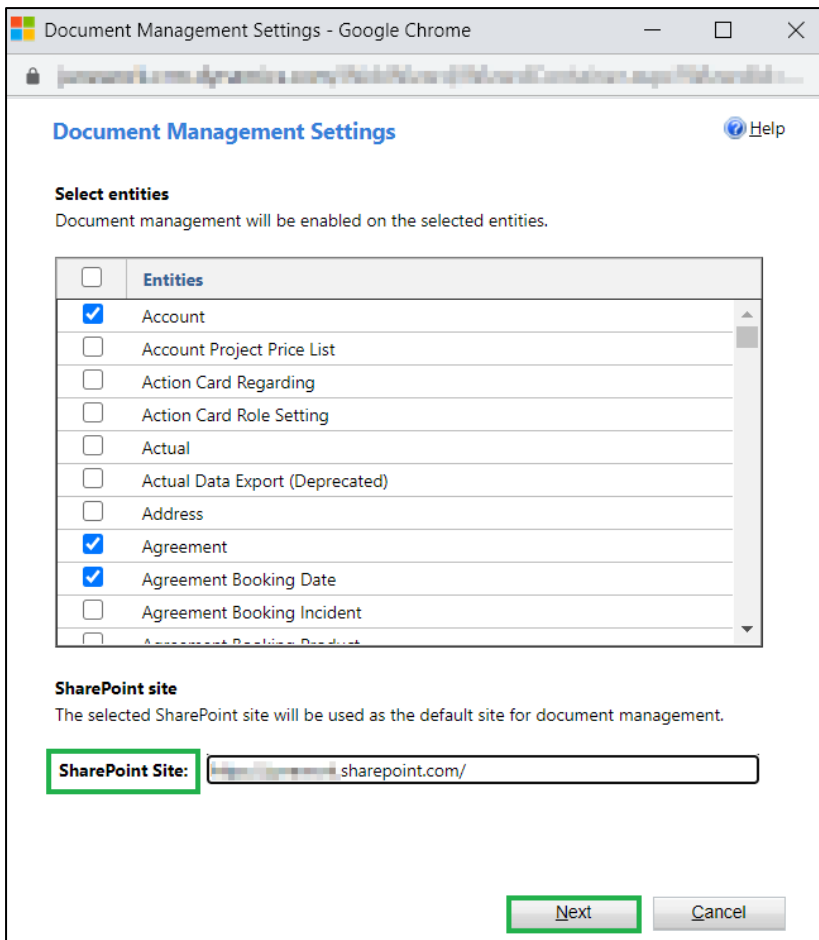
7) Once the site is validated, click on **Finish**.



- 8) The **server-based integration** of SharePoint site is now **enabled** for your Dynamics 365 CRM environment. Now, go back to **Settings → Document Management Settings**.



- 9) Select the **Entities** for which **Document Management** needs to be enabled → Enter the **URL of active SharePoint sites** where you want to store documents → Click on **Next**.



- 10) Check **'Based on entity'** to have document libraries and folders that are based on the Dynamics 365 Account entity automatically created on the SharePoint site. Users will not be prompted to create them.

If you don't want folders automatically created, **do not** select the **'Based on entity'** check box.

Click on **Next** button.

Document Management Settings [Help](#)

is a valid URL.

Select folder structure

To create a folder structure based on a specific entity, click the check box, and select an entity. Folders will be created on SharePoint in the context of your Microsoft Dynamics 365 records.

Based on entity

- 11) Click on **Finish**.

Document Management Settings Help

Document Library Creation Status

To be created:	38
Newly created:	38
Failed:	0
Already existing:	0

Creation Details

Entities	Document Library	Status	Failure Reason
Account	https://.../.../...	Succeeded	
Agreement	https://.../.../...	Succeeded	
Agreement B...	https://.../.../...	Succeeded	
Agreement B...	https://.../.../...	Succeeded	
Agreement In...	https://.../.../...	Succeeded	
Agreement In...	https://.../.../...	Succeeded	
Article	https://.../.../...	Succeeded	
Booking Time...	https://.../.../...	Succeeded	
Category	https://.../.../...	Succeeded	
Expense	https://.../.../...	Succeeded	
Full-time De...	https://.../.../...	Succeeded	

Once this is done, you can easily store Documents/Attachments related to selected Entities in the respective SharePoint site using Attach2Dynamics button.

Configuring Connectors

Disclaimer: The initial background process after the creation of Connector and Entity Configuration could take longer (could run for 3-4 hours) if there are high number of Users, Business Units or both.

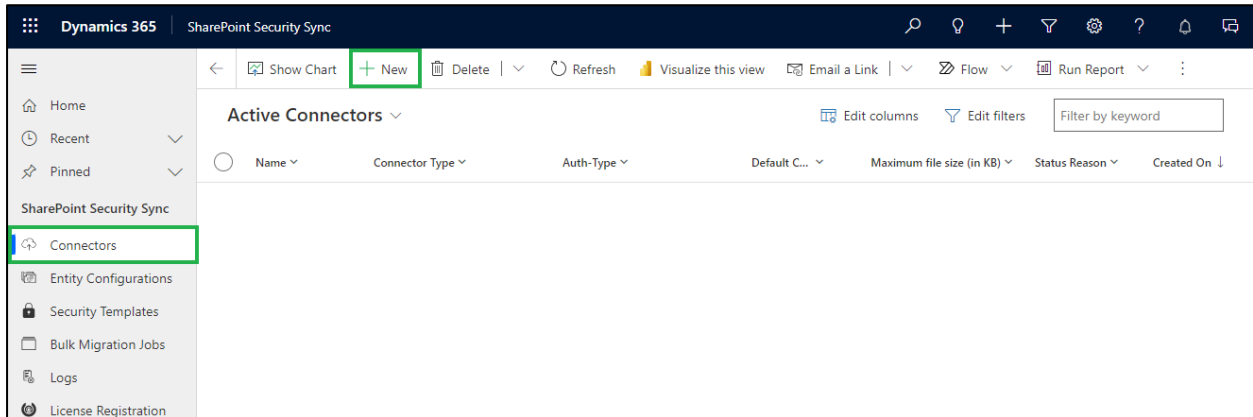
Users --> More than 300

Business Units --> More than 10

Therefore, it is recommended to configure the application during off hours. This will ensure that other user activities are not hampered.

In SharePoint Security Sync, the user can configure multiple connectors for SharePoint. For example: the user can create multiple connectors such as SharePoint_1, SharePoint_2, SharePoint_3, etc. for SharePoint.

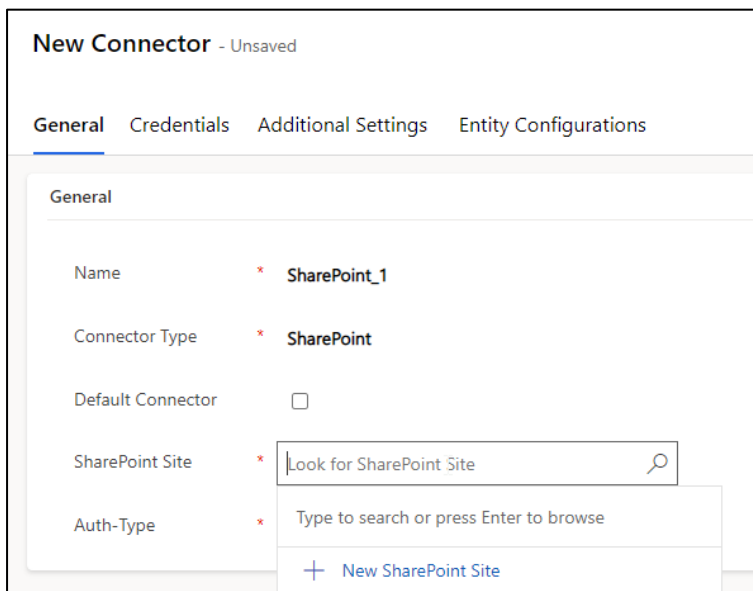
To achieve this, navigate to **SharePoint Security Sync** App and then click '**Connectors**' Entity. Next, click '**New**' to create a new '**Connector**.'



Configuring SharePoint Connector

- a) **Name:** Give name to the connector
Connector Type: Choose **SharePoint** from the drop-down.
Default Connector: If required, enable the checkbox to set SharePoint_1 as default connector.

- b) **SharePoint Site:** It is the location of SharePoint, where files and folders will be stored. Select the valid SharePoint site here.

A screenshot of the 'New Connector' form in Dynamics 365. The form has four tabs: 'General', 'Credentials', 'Additional Settings', and 'Entity Configurations'. The 'General' tab is active. The form contains the following fields:

- Name:** * SharePoint_1
- Connector Type:** * SharePoint
- Default Connector:**
- SharePoint Site:** * Look for SharePoint Site (with a search icon)
- Auth-Type:** * Type to search or press Enter to browse

At the bottom of the form, there is a '+ New SharePoint Site' button.

Note: User cannot reuse the same SharePoint site for each new connector.

c) **Auth-Type:** The Auth-Type is of two types, **Credential** and **App**.

The screenshot shows the 'New Connector' form in the 'General' tab. The fields are as follows:

- Name: * SharePoint_1
- Connector Type: * SharePoint
- Default Connector:
- SharePoint Site: * Default Site
- Auth-Type: * --Select-- (dropdown menu is open showing options: --Select--, Credential, App)

1. **Credential:** This indicates that Authentication with the connector is done through Credential i.e. id and password. It is mandatory to enter credentials in order to create a new Connector. For authentication through credentials, for any attachment action, the name of user appears who has authenticated the Connector. Enter value for **Id** and **Password/Secret**. Next authenticate the credentials.

The screenshot shows the 'New Connector' form in the 'Credentials' tab. The fields are as follows:

- Id: *
- Password/Secret: * ZZZZ UXNVE LKVLB GAGVK RWBTC AESVQ BUJI...

Note: Id and Password for SharePoint: In the **Id** field enter your username and in **Password/Secret** field enter password. It can be your normal Dynamics 365 CRM credentials.

2. **App:** This is to provide authentication with App. In App authentication, if any action is performed then the name of logged-in user appears.

New Connector - Unsaved

Jack Smith Owner Unauthenticated Status Reason

General **Credentials** Additional Settings Entity Configurations

Id * ---

Password/Secret * ---

Use below as your redirect url

https://org742a944f.crm.dynamics.com/WebResources/ikl_/Attach2Dynamics/Callback.html

Note : Valid only for SharePoint.

In order to know how to generate Id and Password/Secret for App [click here](#).

After you have generated the Id and Password enter them in the fields provided.

Sales SharePoint Site - Saved

Connector

Jack Smith Owner Authenticated Status Reason

General **Credentials** Additional Settings Entity Configurations Related

Id * 92770260-095d-4081-b548-8128b6ee6ca7

Password/Secret * ZZZZZ IVNWF HMOAI BJKSI MPCKW NHOSR ...

Use below as your redirect url

https://org742a944f.crm.dynamics.com/WebResources/ikl_/Attach2Dynamics/Callback.html

Note : Valid only for SharePoint.

Now if any logged in user uploads or performs any attachment action on files in SharePoint, their name will appear for the action.

Let's upload few files and see how it works.

- Navigate to a desired 'Entity' e.g. **Accounts Entity**.

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The screenshot shows the Dynamics 365 Sales Hub interface. The left navigation pane is visible, with the 'Accounts' menu item highlighted by a green box. The main content area displays a table of active accounts.

Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
A. Datum Corporation	425-555-0158	Redmond	Kevin Martin	kevin@adatum.com
Adventure Works				
Alpine Ski House	281-555-0157	Dallas	Cacilia Viera	cacilia@alpineskihouse...
Fabrikam, Inc.	423-555-0103	Lynnwood	Haroun Stormonth	haroun@fabrikaminc.co...
Fyzher Technologies				
Jack Smith Production House				
Northwind Traders	614-555-0121	Columbus	Heriberto Nathan	heriberto@northwindtr...
Sales Account				
Trey Research	619-555-0127	San Francisco	Alex Baker	alex@tresearch.net

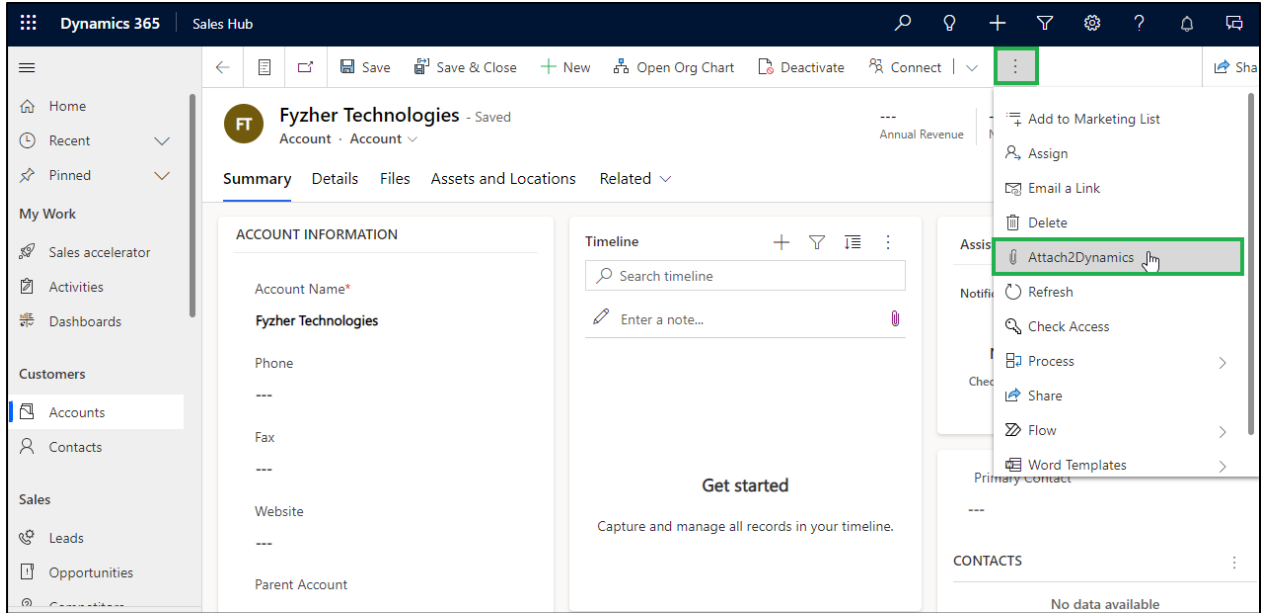
- Click on required **Account Record**.

The screenshot shows the Dynamics 365 Sales Hub interface. The left navigation pane is visible, with the 'Accounts' menu item highlighted. The main content area displays a table of active accounts. The 'Fyzher Technologies' account record is highlighted with a green box.

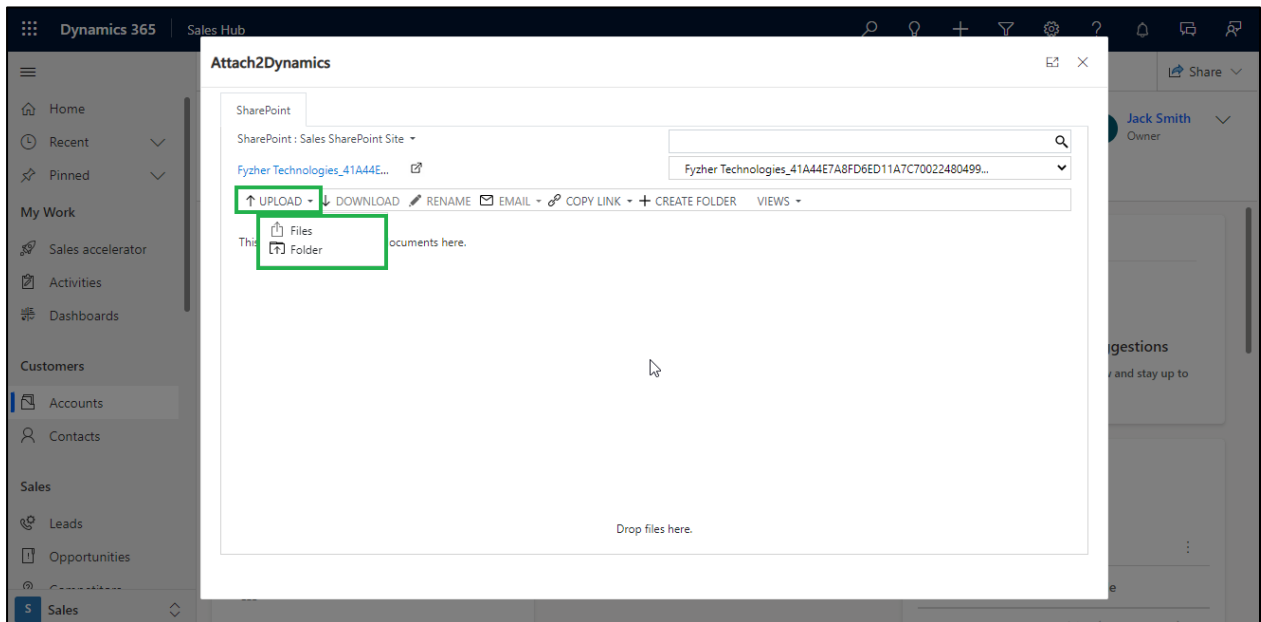
Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
A. Datum Corporation	425-555-0158	Redmond	Kevin Martin	kevin@adatum.com
Adventure Works				
Alpine Ski House	281-555-0157	Dallas	Cacilia Viera	cacilia@alpineskihouse...
Fabrikam, Inc.	423-555-0103	Lynnwood	Haroun Stormonth	haroun@fabrikaminc.co...
Fyzher Technologies				
Jack Smith Production House				
Northwind Traders	614-555-0121	Columbus	Heriberto Nathan	heriberto@northwindtr...
Sales Account				
Trey Research	619-555-0127	San Francisco	Alex Baker	alex@tresearch.net

- Now Click on **'Attach2Dynamics'** Button.

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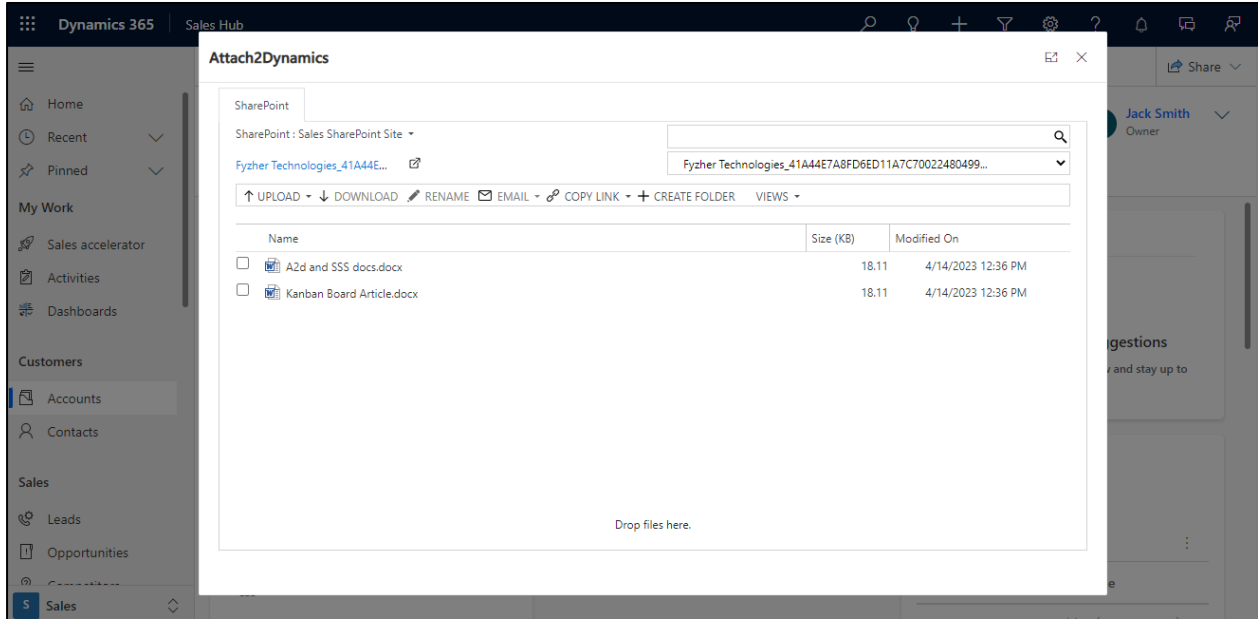


- Click on **'Upload'** Button.

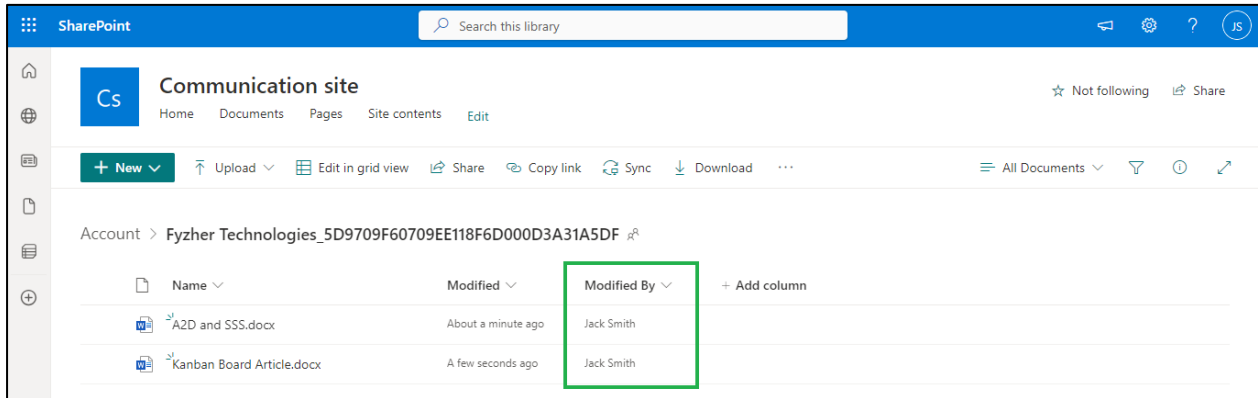


- Now your **'Files'** will be uploaded on SharePoint.

SharePoint Security Sync – User Manual

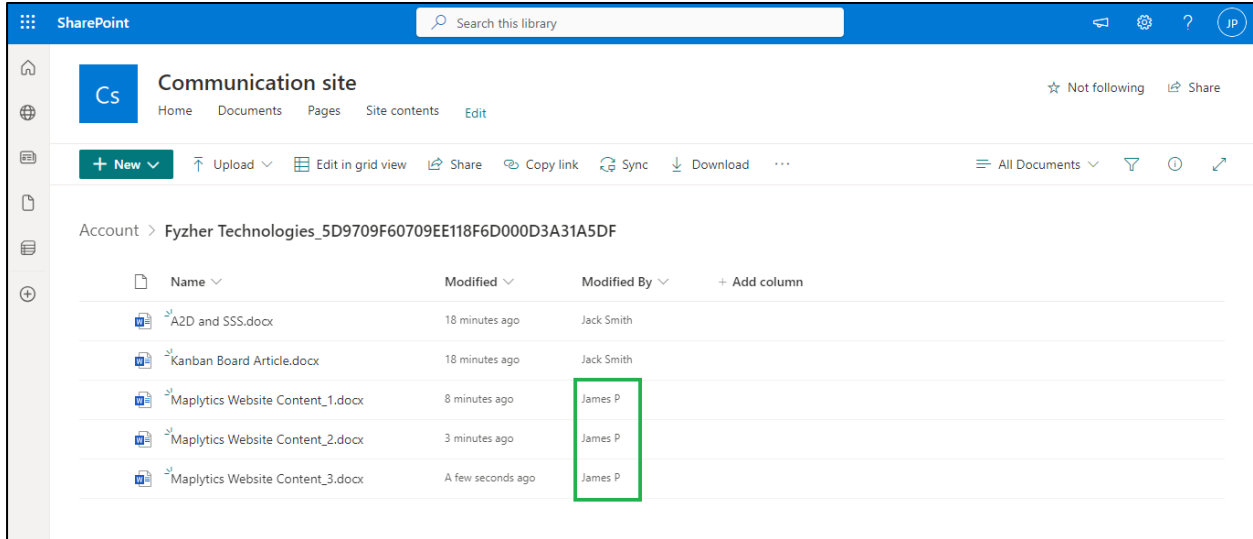


Here the name of the admin appears when they are logged in and have uploaded the file.



Now let's take another use-case when a user, who is not an admin uploads a file. James is a Sales Manager who does not have admin rights. Now he uploads the files while being logged in, and his name appears as the user uploading the file.

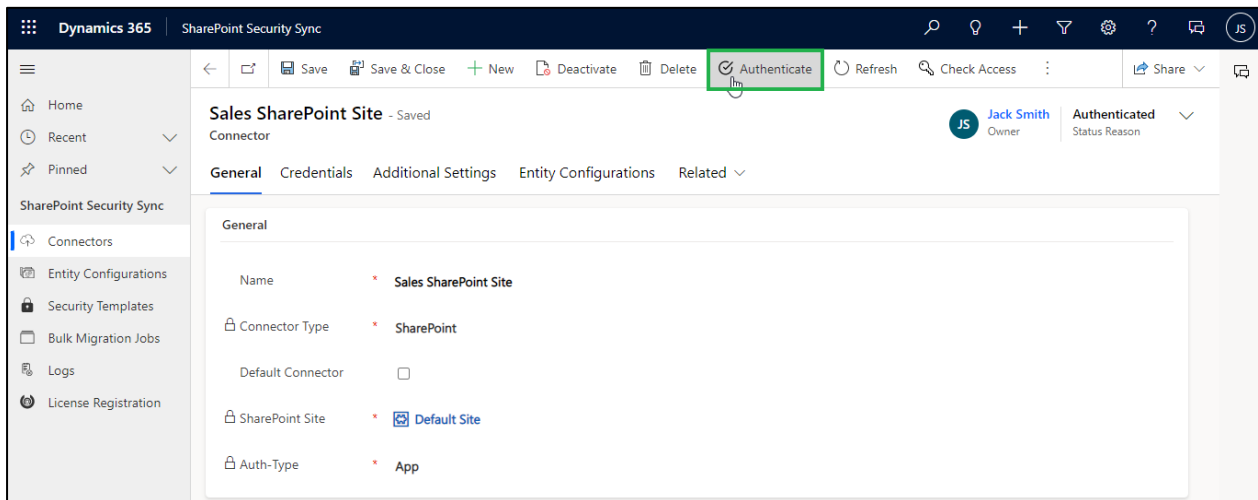
SharePoint Security Sync – User Manual



Authenticate

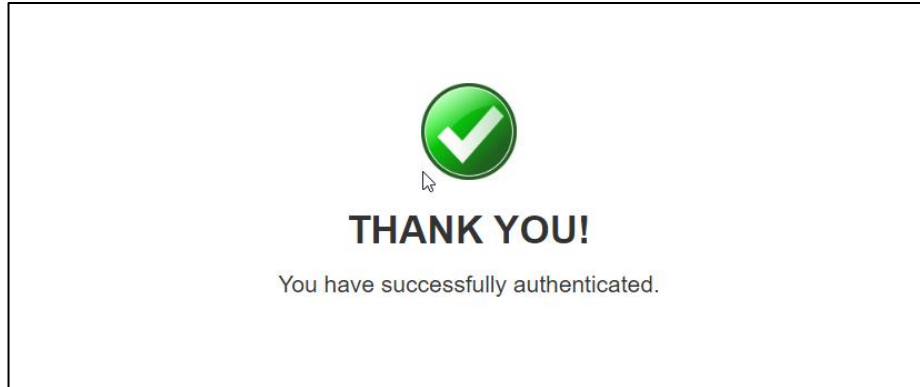
After the Connector record is created the connector credentials need to be authenticated.

To authenticate the connector, **Authenticate** button is provided on the command bar. This button is visible only to users with SharePoint Security Sync Administrator role.

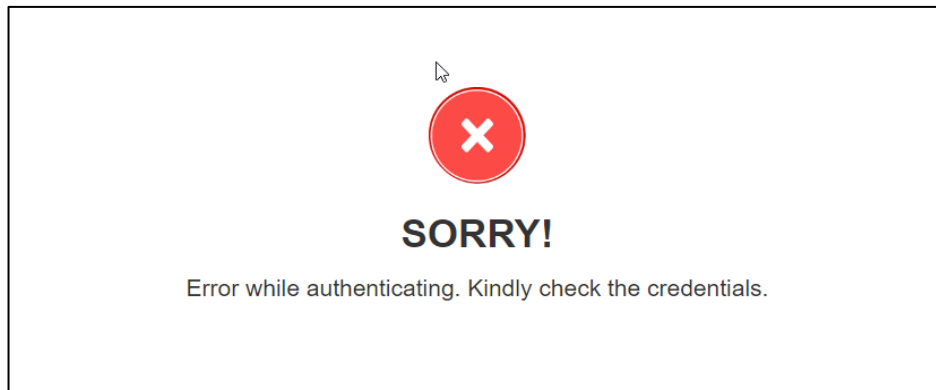


After the Connector is Authenticated, create Entity Configuration record.

If Connector is authenticated successfully, the following success pop up will appear:



If Connector authentication fails, then the following error pop up will appear:

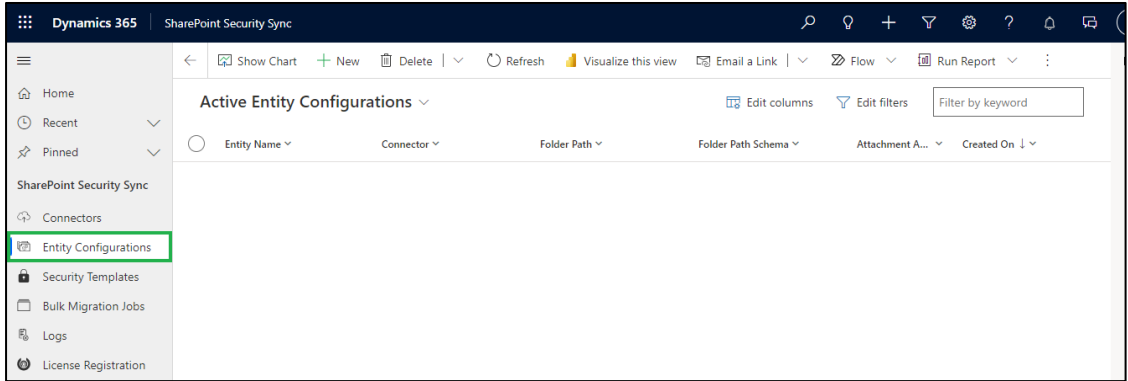


Entity Configuration

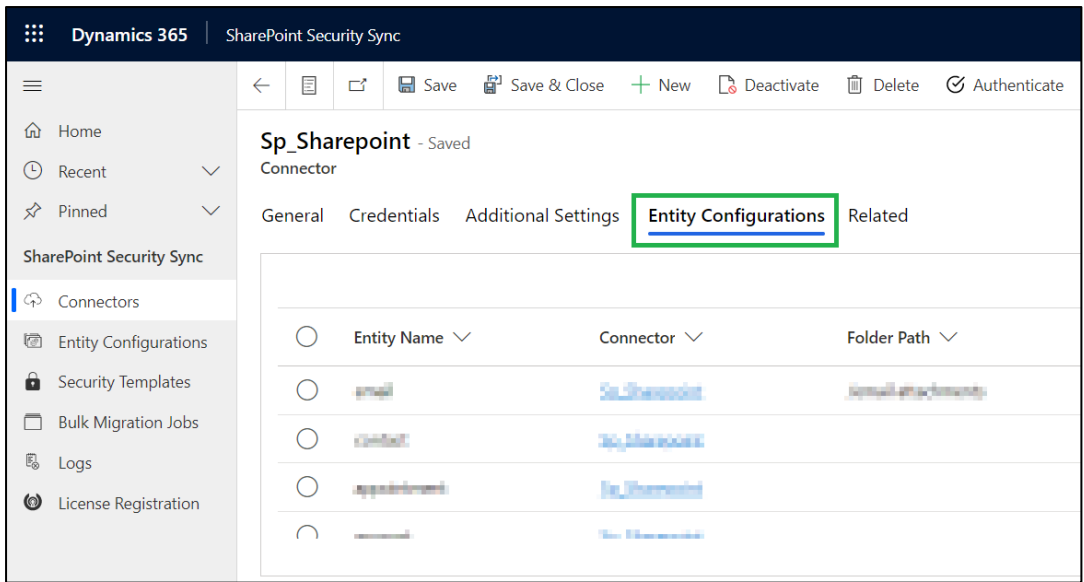
Disclaimer: In order to synchronize security for {EntityName} in SharePoint, we'd have to break the inheritance of permission for the record folder within the respective Document Library in SharePoint. If ever you wish to restore the original state, it needs to be done manually and **Inogic does not take any responsibility of restoring it to the original state.**

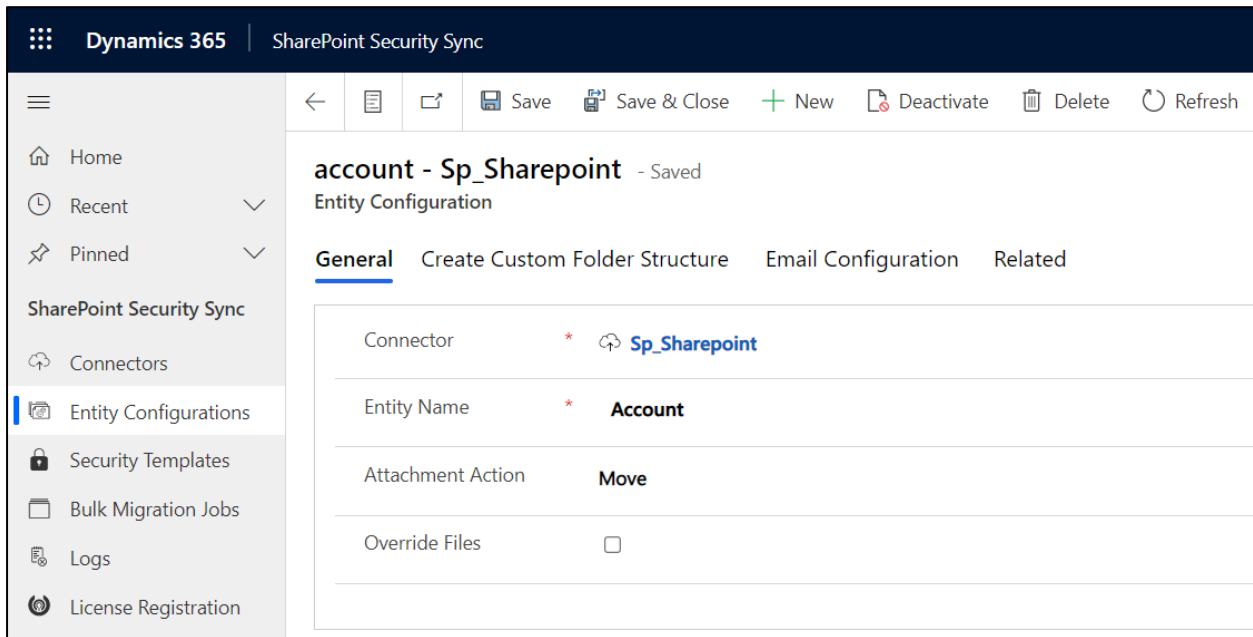
For 'Entity Configuration' go to **SharePoint Security Sync** → **Entity Configuration**.

SharePoint Security Sync – User Manual



Entity Configurations can be created from the Connector form too, just click on Entity Configuration Tab on Connector page and click on “+ New ” button.





General:

- a) **Connector:** Select the Connector for which you want to configure the Entity.
- b) **Entity Name:** Mention the Entity for which you are configuring.
- c) **Attachment Action:** You can either **Copy** or **Move** the attachment.
 - i) **Copy:** If you Select **Copy**, the attachment will be copied to SharePoint, and its cloud storage path will be stored against the record along with original attachment in the Dynamics 365 CRM.
 - ii) **Move:** If you Select **Move**, the attachment will be moved/migrated out of Dynamics 365 CRM to SharePoint, and its cloud storage path will be stored against the record.
 - iii) **None Selected:** If you don't select any option then the Attachment will not be moved to SharePoint but you will still able to use the Attach2Dynamics document management UI for the respective entity.
- d) **Override files:** If checked, means trying to upload file with same name will be overridden. If unchecked, then a new file with timestamp will get added and uploaded in SharePoint.
- e) **Auto Create Folder:** By default 'No' is selected for this field. If 'Yes' is selected then folder will be created in SharePoint for the respective entity automatically.

Create Custom Folder Structure:

SharePoint Security Sync gives provision to create your own folder structure within SharePoint for storing documents/attachments. With this tab, you can customize both the library structure as well as the record folder structure in SharePoint site. This tab is divided into two sections – **Create Library Structure** and **Create Record Folder Structure**.

The '**Create Library Structure**' section can be set as follows:

- **Library Structure:** This is an optionset field with following options – **By Period, By Starting Character and Custom.** Select either one of these options. Based on the option selected, further fields will be made available.
 - **By Period:** If this option is selected then the document library structure will be created based on certain period. To be precise, the period is based on **‘createdon’** date of record. In order to define the period additional fields are required to be populated. These fields include:
 - **Period Type:** This is yet another optionset field with the following options - **Daily, Weekly, Monthly, Quarterly, Yearly, X Month** and **X Year.**
 - **Duration:** This is a numerical field. It appears when **‘X Month’** or **‘X Year’** option is selected in **‘Period Type’**.
 - **Select Date Format:** This is also optionset field with numerous options. Select any one format for the date.

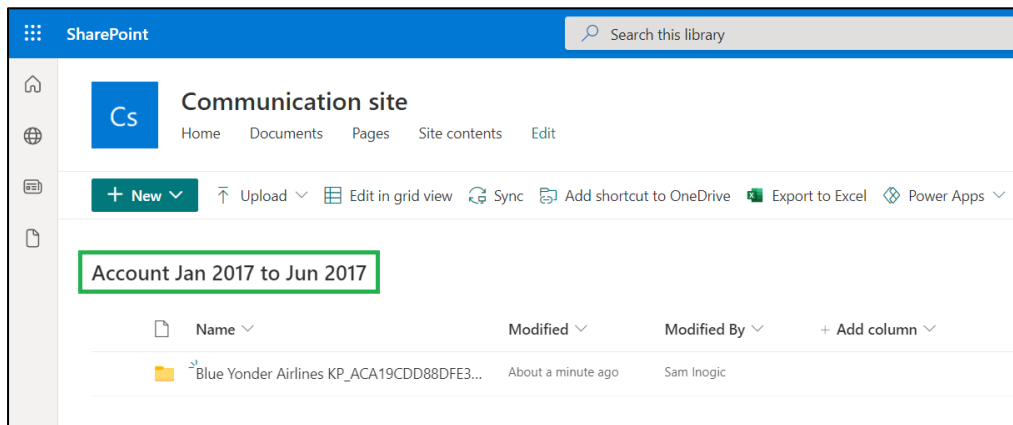
For example, suppose if user has set **‘Period type’** to **‘X Month’** and **‘Duration’** to **‘6’**. Now based on this setting a half yearly document library will be created in SharePoint for whichever record created for that particular period.

account - Sp_Sharepoint - Saved
Entity Configuration

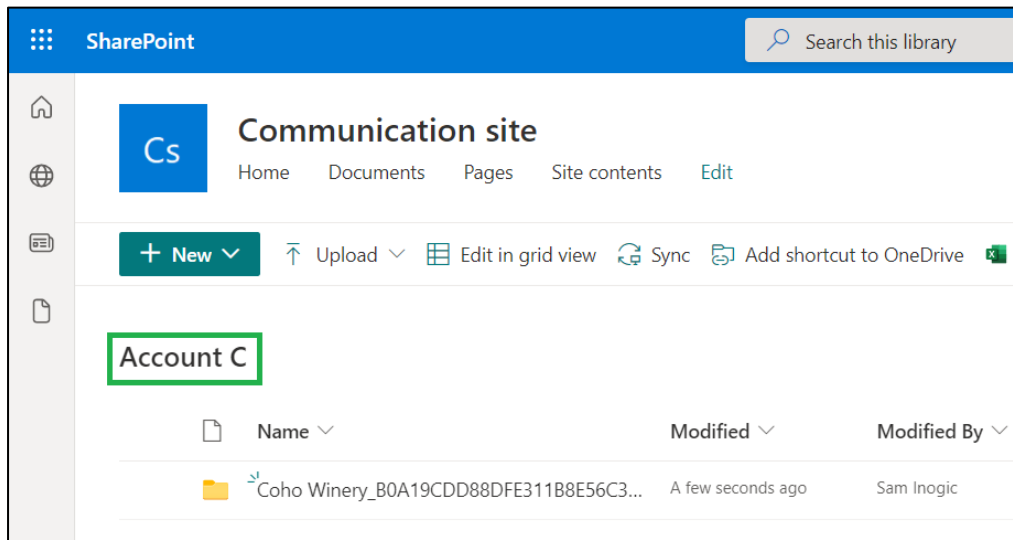
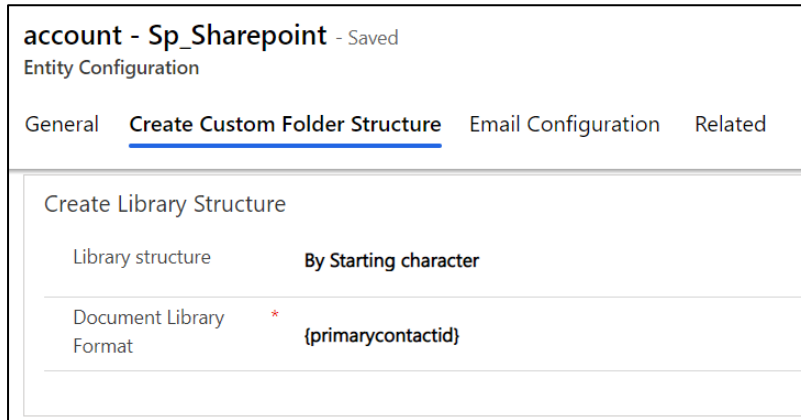
General Create Custom Folder Structure Email Configuration Related

Create Library Structure

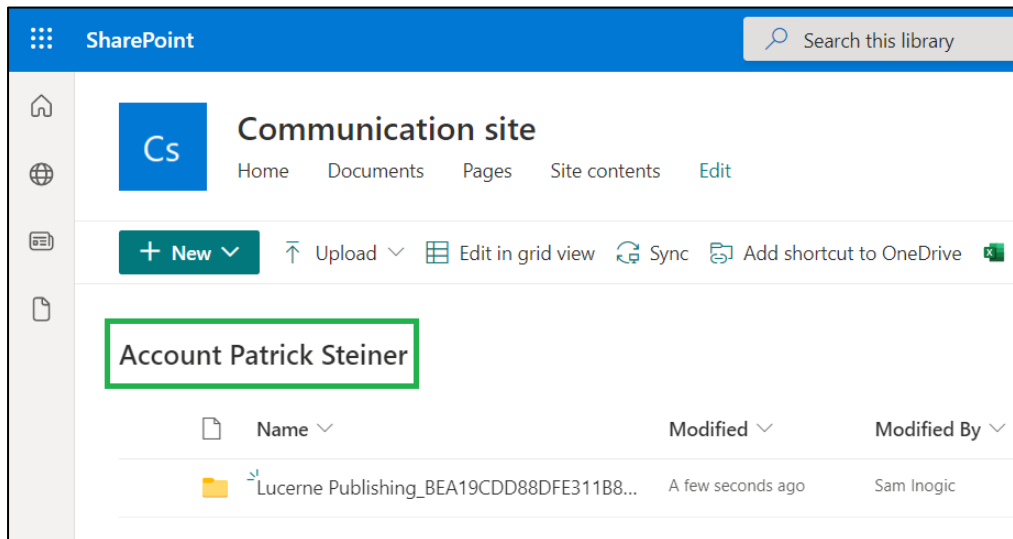
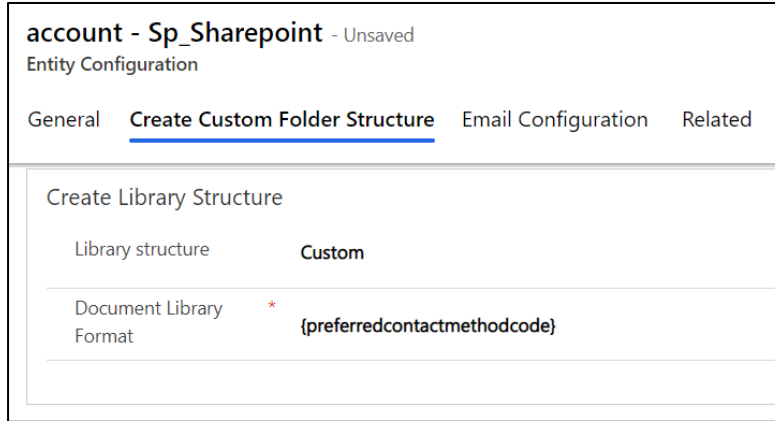
Library structure	By Period
Period type *	X Month
Duration *	6
Select date Format *	MMM yyyy



- **By Starting Character:** If this option is selected then the document library structure will be created based on the starting character of the chosen field name. Once this option is selected, the following additional field needs to be populated:
 - **Document Library Format:** Here, logical name of the field is to be entered within brace brackets {}. And the field type should be either Single.Text, Optionset or Lookup.



- **Custom:** With this option, you can create document library structure based on the full name of any chosen field. Once this option is selected, the following additional field needs to be populated:
 - **Document Library Format:** Here, logical name of the field is to be entered within brace brackets {}. And the field type should be either Single.Text, Optionset or Lookup.



The 'Create Record Folder Structure' section can be set as follows:

- **Folder Format:** Here, you can either use logical name or any text to name the folder. Further, you can also use combination of both logical name and text.

For example, suppose if user has used combination of logical and text for 'Folder Format' like '{name} KP.' Now based on this setting the following record folder structure will be created in SharePoint.

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account - Sp_Sharepoint - Saved
Entity Configuration

General **Create Custom Folder Structure** Email Configuration Related

Create Library Structure

Library structure **By Period**

Period type * **X Month**

Duration * **6**

Select date Format *

Create Record Folder Structure

Folder Format **(name) KP**

SharePoint Search this library

Communication site Home Documents Pages Site contents Edit

+ New Upload Edit in grid view Share Copy link Sync Download Add shortcut to OneDrive

Account Jan 2017 to Jun 2017 > **Blue Yonder Airlines KP_ACA19CDD88DFE311B8E56C3BE5A8B200**

Name Modified Modified By + Add column

Email Configuration: The next is Email Configuration tab. With this tab you can send the documents as attachments/links through email to the required recipients. You can set this tab as shown in below screenshot.

account - Sp_Sharepoint - Saved
Entity Configuration

General Create Custom Folder Structure Email Configuration Related

From	Me	
To	Users	x Brian B
Cc	Team	x BU 1
Bcc	Dynamic	x OwningUser

- **From** – The sender i.e. the person who sends the email
- **To** – Recipient i.e. the person to whom the email is to be sent
- **CC** – Carbon Copy i.e. the person to whom a copy of the email information is to be sent
- **BCC** – Blind Carbon Copy i.e. the person you have kept in the loop and do not want the other recipients to see that particular contact
- Types of Email addresses to select from:
 - a. **Users** – If you select Users then all the CRM users present in the environment will be enlisted while selecting the data.
 - b. **Queue** – If you select Queue then all the queues present in the environment will be enlisted while selecting the data.
 - c. **Team** – If you select Team then all the teams created in the environment will be enlisted while selecting the data.
 - d. **Dynamics** – E.g. If you have selected quote as an entity then all the lookup fields on quote which are allowed to send email will be enlisted while selecting the data.
 - e. **Manager** – E.g. If you have selected quote as an entity then, all the system-user lookup fields on quote entity will be enlisted while selecting the data, and recipient would be the manager of the selected data.

Note:

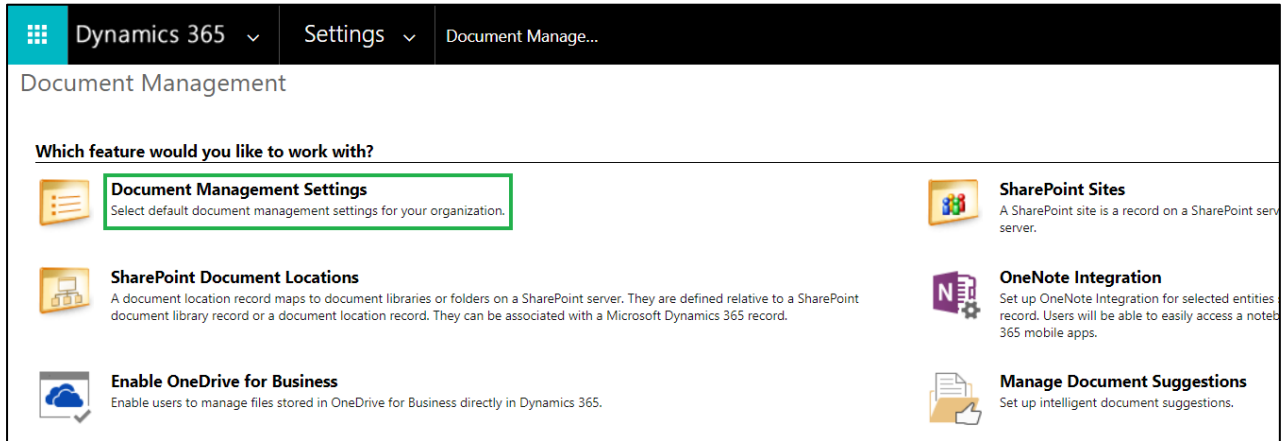
- 1) To use SharePoint Security Sync functionalities on an **Entity** it is mandatory that you create an **Entity Configuration** record for the same.
- 2) Attachment Actions can be enabled only for one entity with one Connector.
- 3) Connector and Entity Configuration are editable if user has SharePoint Security Sync Administrator role.
- 4) SharePoint Security Sync User can only read the Connector and Entity Configuration.
- 5) The security level privileges will start syncing once after creating entity configuration the user hits the File tab or Attach2Dynamics button.

Configuring Hierarchy Structure

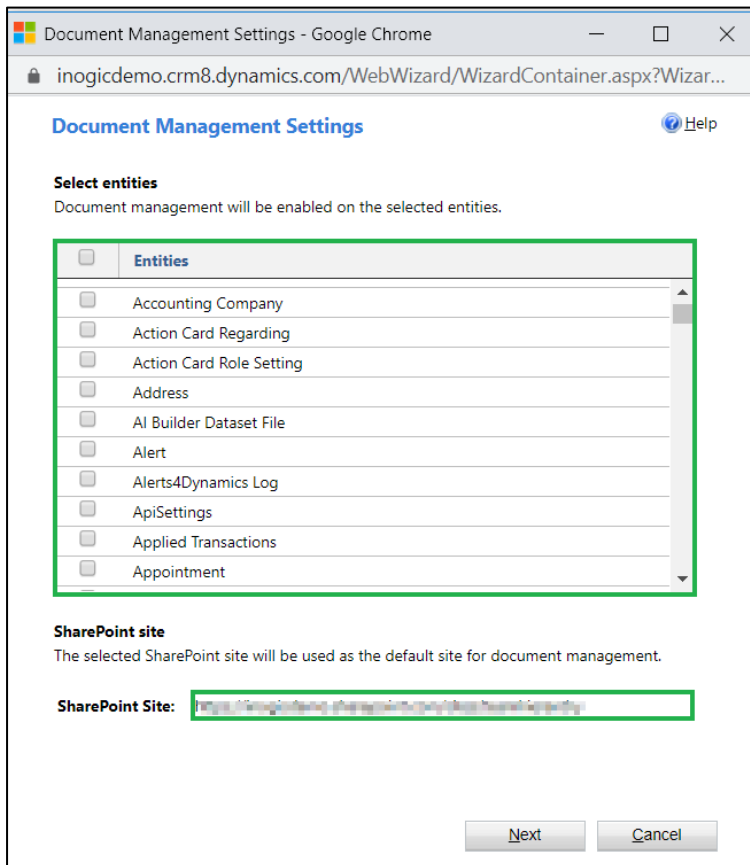
Attachments/Documents of Dynamics 365 CRM records can be stored in SharePoint sites on the basis of hierarchy.

To achieve this, follow the steps given below:

- 1) Go to **Advanced Settings** → **Settings** → **Document Management Settings**.



- 2) Select **Entities** → Enter the **URL** of respective SharePoint site.



- 3) Enable the Checkbox '**Based on Entity**' → Select either of the entities, Account or Contact and click on '**Next**'.

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Document Management Settings - Google Chrome

inogicdemo.crm8.dynamics.com/WebWizard/WizardContainer.aspx?Wizar...

Document Management Settings

[Help](#)

<https://inogicdemo.sharepoint.com/sites/teamhierarchy> is a valid URL.

Select folder structure

To create a folder structure based on a specific entity, click the check box, and select an entity. Folders will be created on SharePoint in the context of your Microsoft Dynamics 365 records.

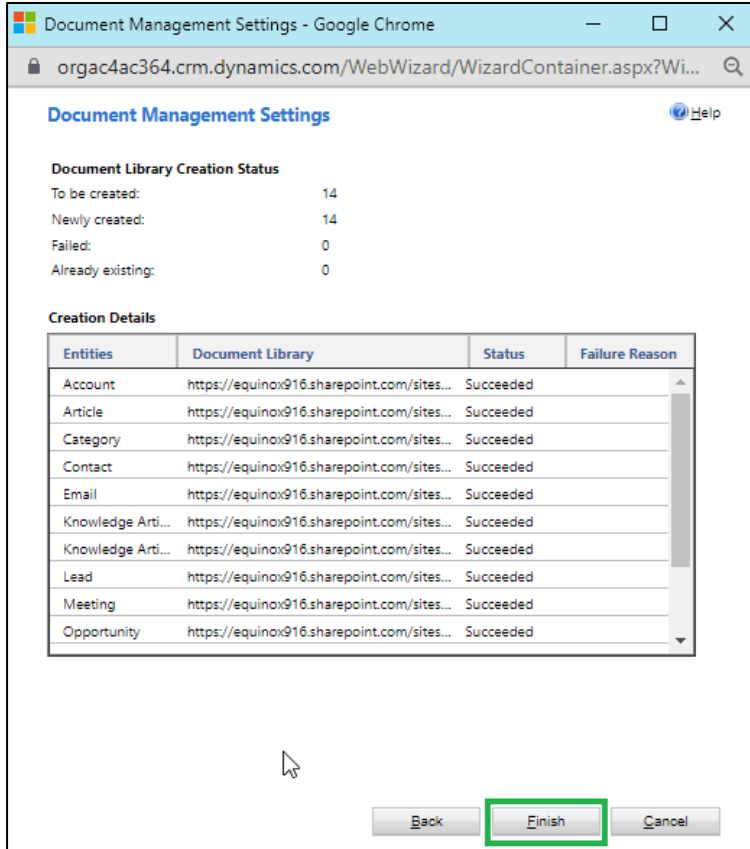
Based on entity

Contact
Account
Contact

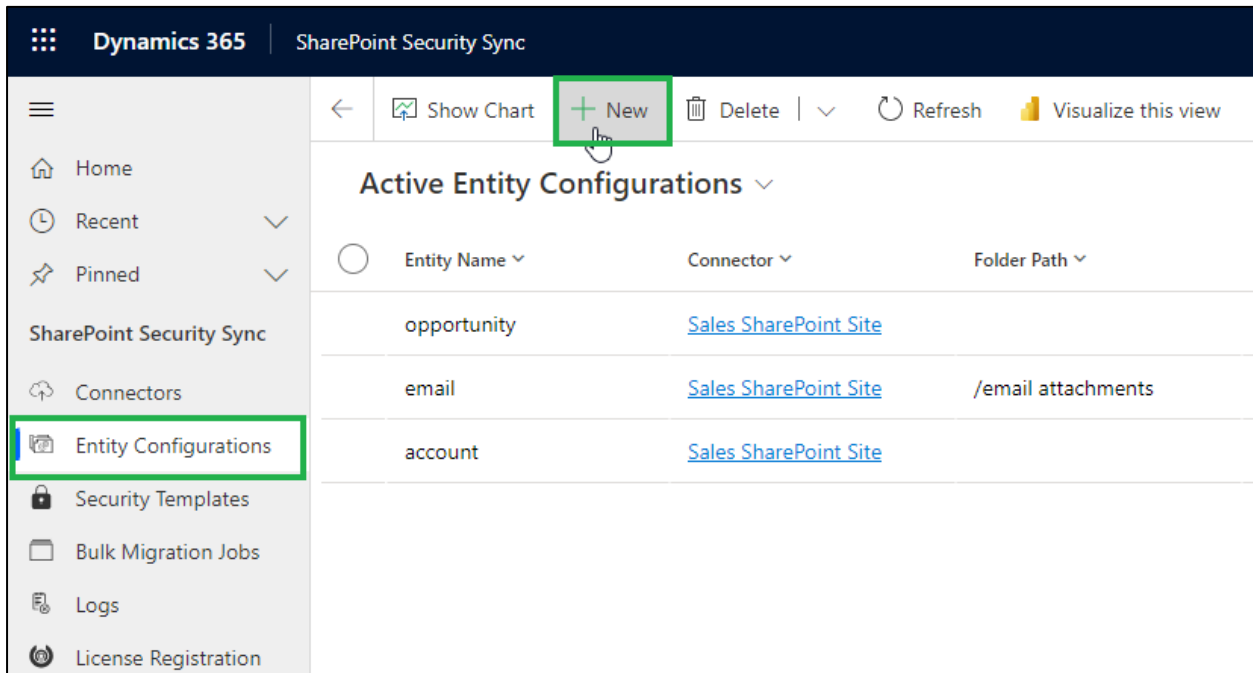
Back Next Cancel

- Click on **'Finish'**.

SharePoint Security Sync – User Manual



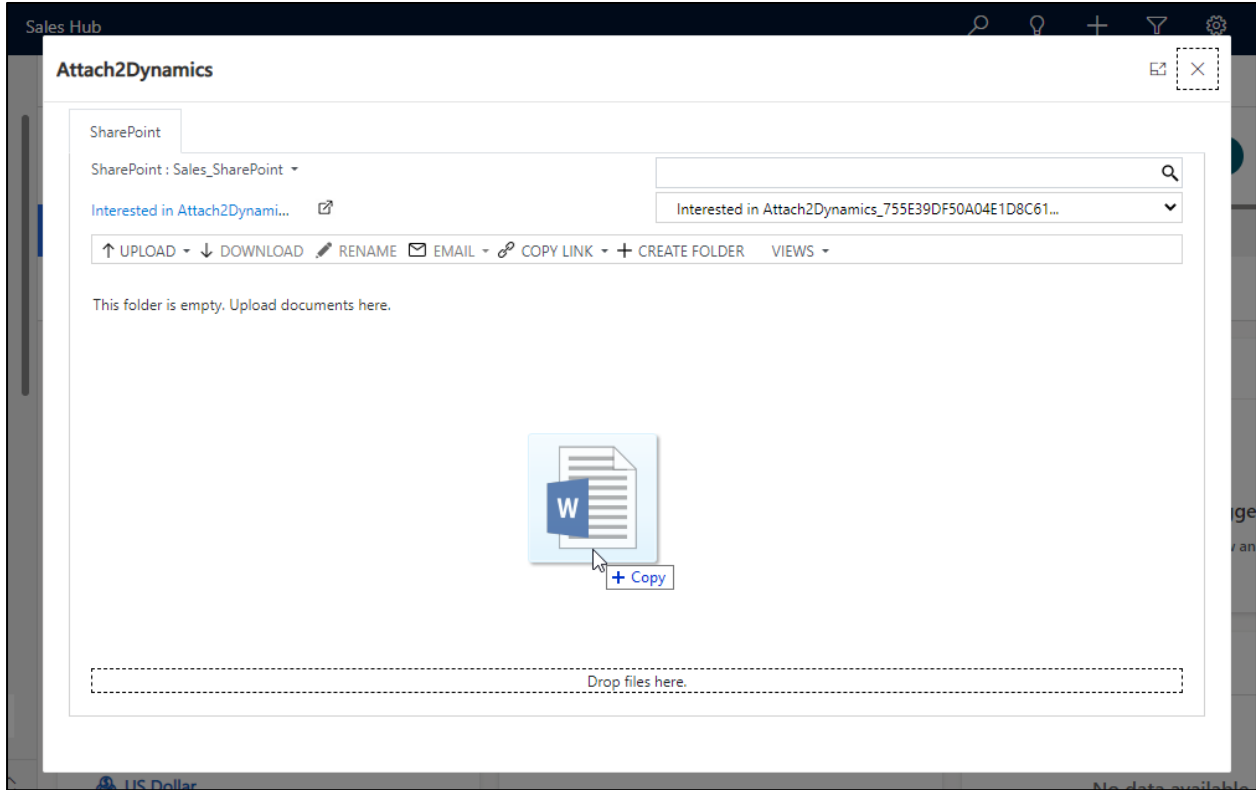
4) Next, go to **SharePoint Security Sync** → **Entity Configurations** → Click on **New**.



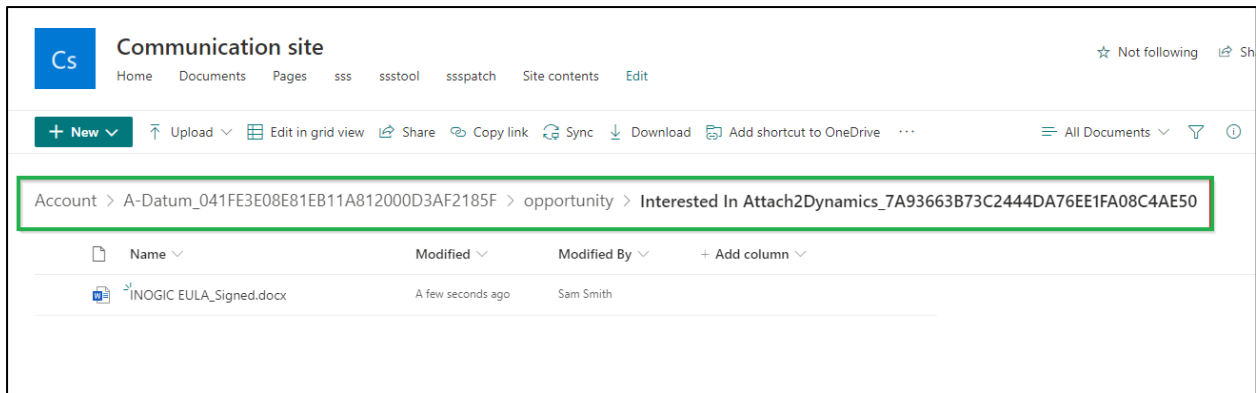
5) Populate the following fields → Click on Save.

- a. **Connector:** Select the connector for the particular SharePoint site
- b. **Entity Name:** Select the entity.
- c. **Attachment Action:** Select either move or copy
- d. **Override Files:** Enable the checkbox if required
- e. **Folder Structure Fields:** This field appears on selection of the entity for which hierarchy structure is configured. In this field, customized entity with Account or Contact lookups will be populated. Select either of the entities.

6) Now go to **Opportunity** → Select an opportunity → Click on Attach2Dynamics button → Drag and Drop required file.



- 7) Next, go to SharePoint site. Here, the respective file will be stored in the following manner:
Account > Account Name_guid > Opportunity > Opportunity Name_guid.

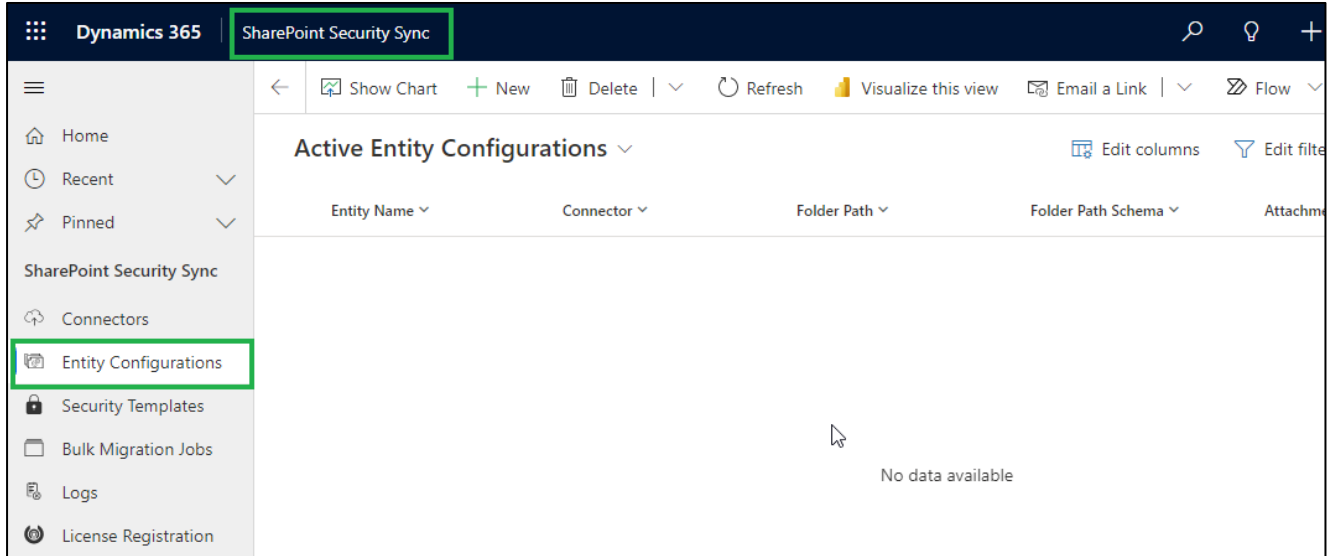


Activity Entity Configuration

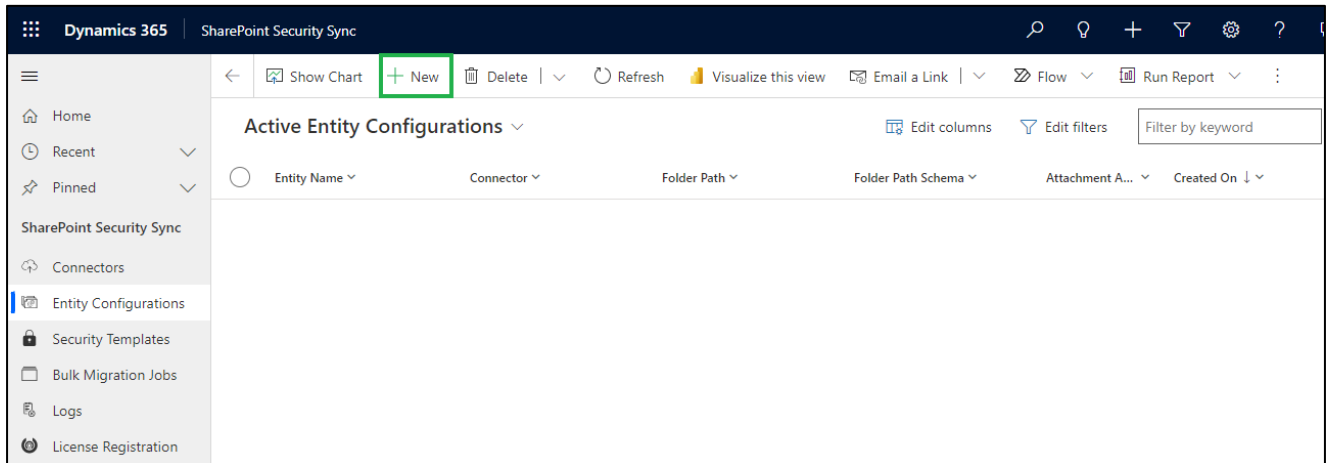
To create entity configuration for Activity Entities, follow the steps given below:

- Navigate to **SharePoint Security Sync App --> Entity Configurations.**

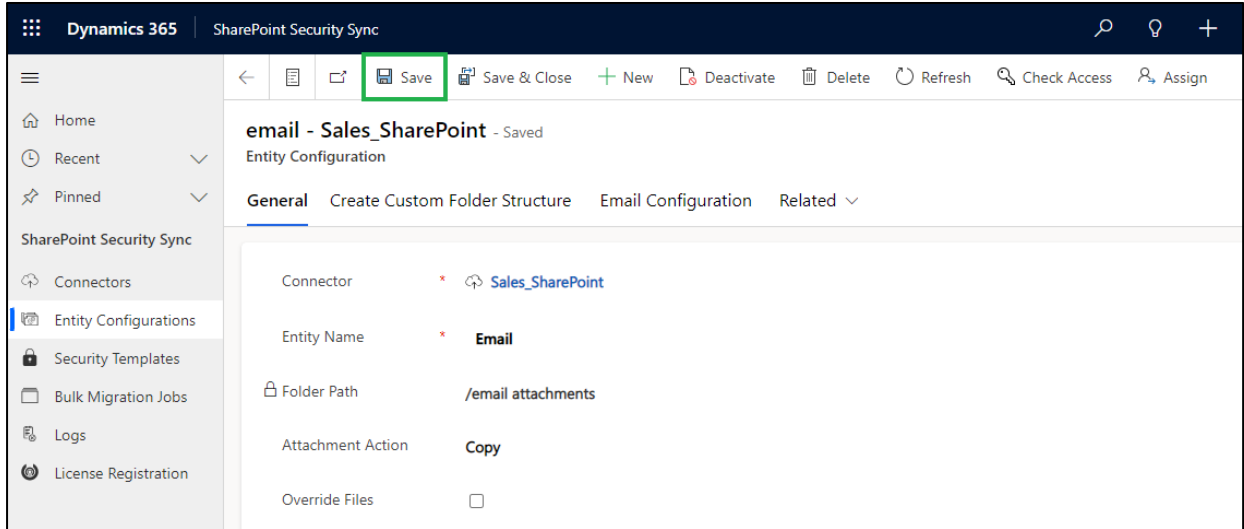
SharePoint Security Sync – User Manual



- Click on **+New**.

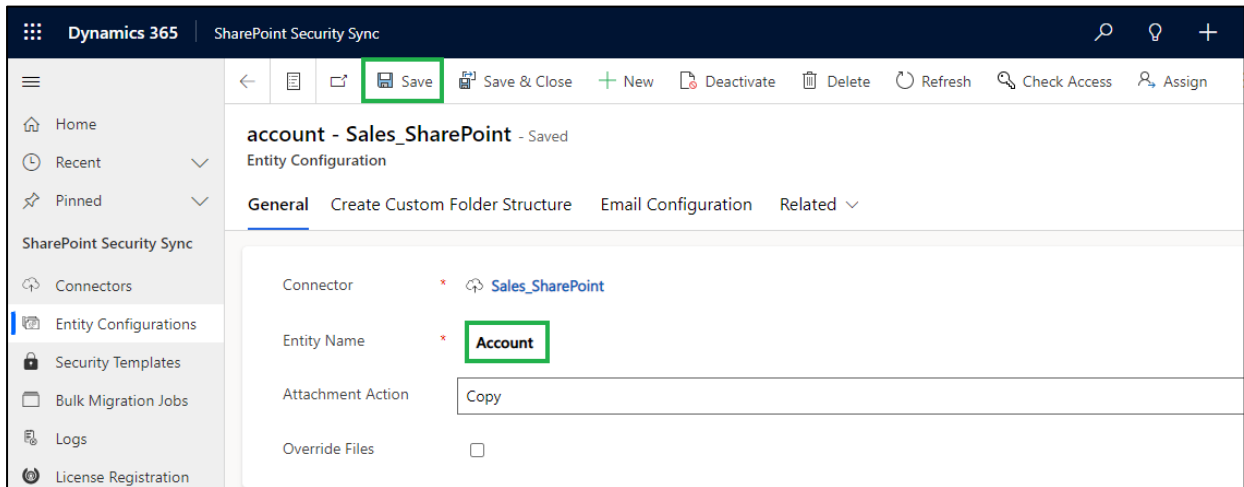


- Enter the required details to create Entity Configuration for **Email** --> Click on **Save**.



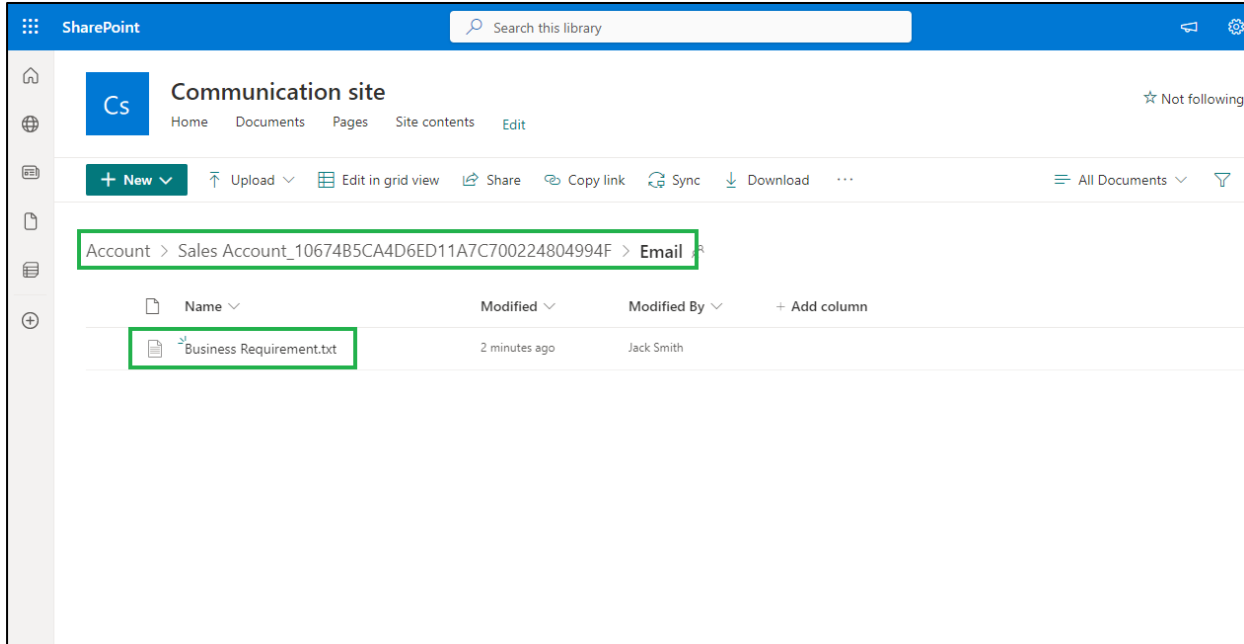
Example 1:

If an Account record is set as a Regarding for an Email record then create an entity configuration for the **Account** entity as shown in the below screenshot. Make sure to select either **Copy** or **Move** as an attachment action while configuring the entity record.



- Once the Email is **Sent or Received**, the attachments will get migrated to SharePoint and the email attachment would be uploaded inside an email folder present in the regarding record folder as shown in the below screenshot:

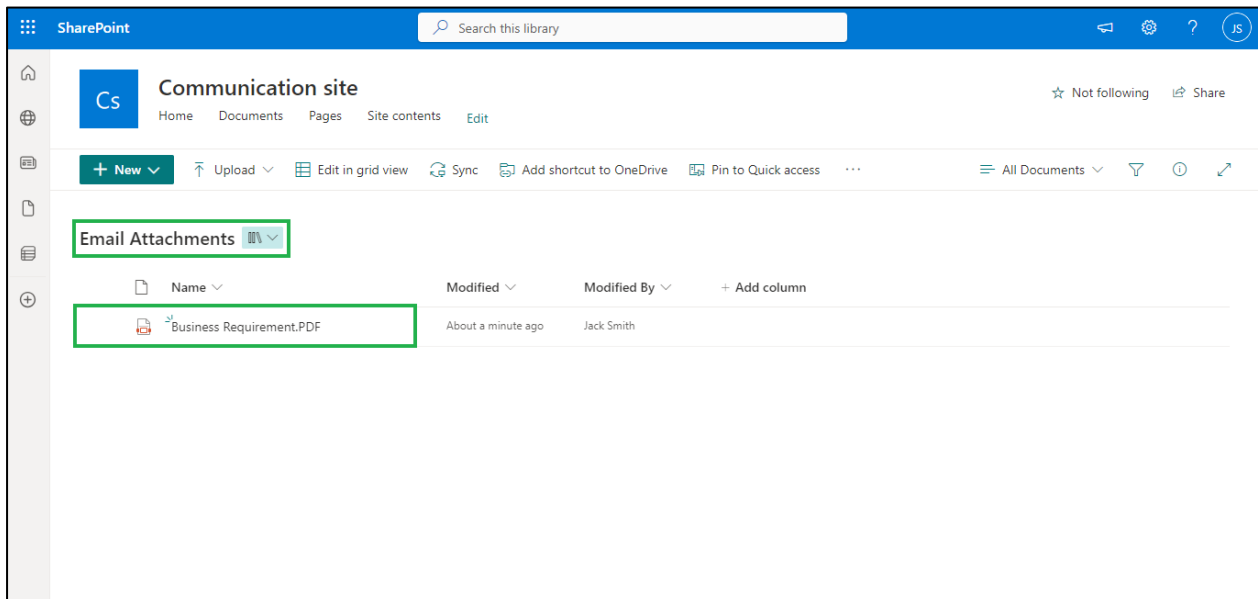
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- Similarly, if there are any other entity records as an email regarding then create an Entity configuration for those entities as well.

Example 2:

- If any entity record is not set as a Regarding for an Email record, then once the Email is **Sent or Received**, the attachments will get migrated to SharePoint, and the email attachment will be uploaded to respective email attachment folder as shown in the below screenshot:

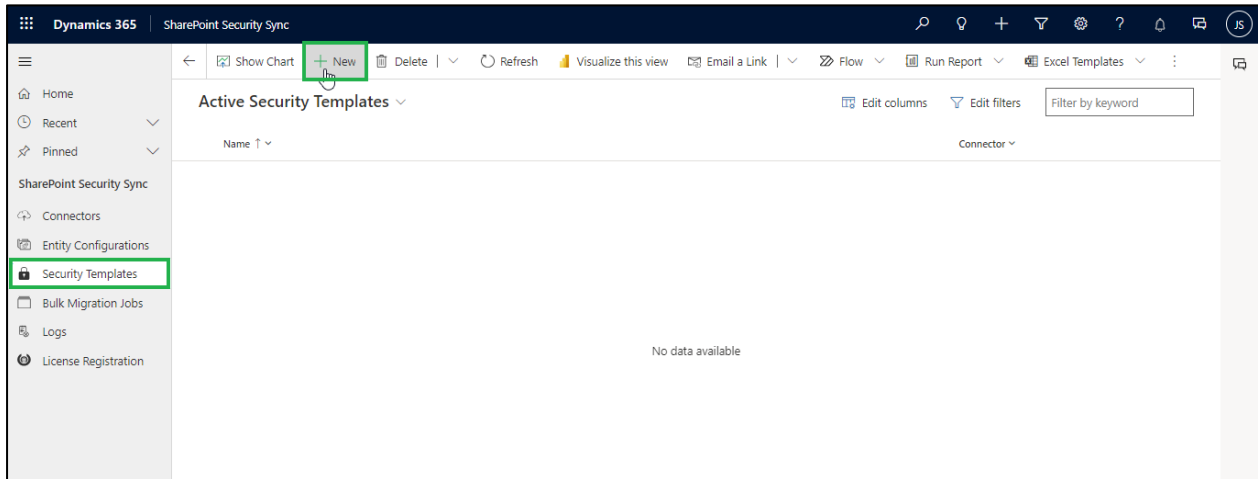


Security Templates

Security Templates Entity enables to control access given to the users over various features of Attach2Dynamics UI such as Upload, Download, Email, Copy Link, Rename etc. in SharePoint.

Note: *If two records of security template are created for the same user then the user will get highest access permission from either of the records.*

To configure Security Templates, go to **SharePoint Security Sync App --> Security Templates --> Click on '+New'**.



Fill the respective fields.

1. General

This section is where you define the name of record and the connector to SharePoint.

New Security Template

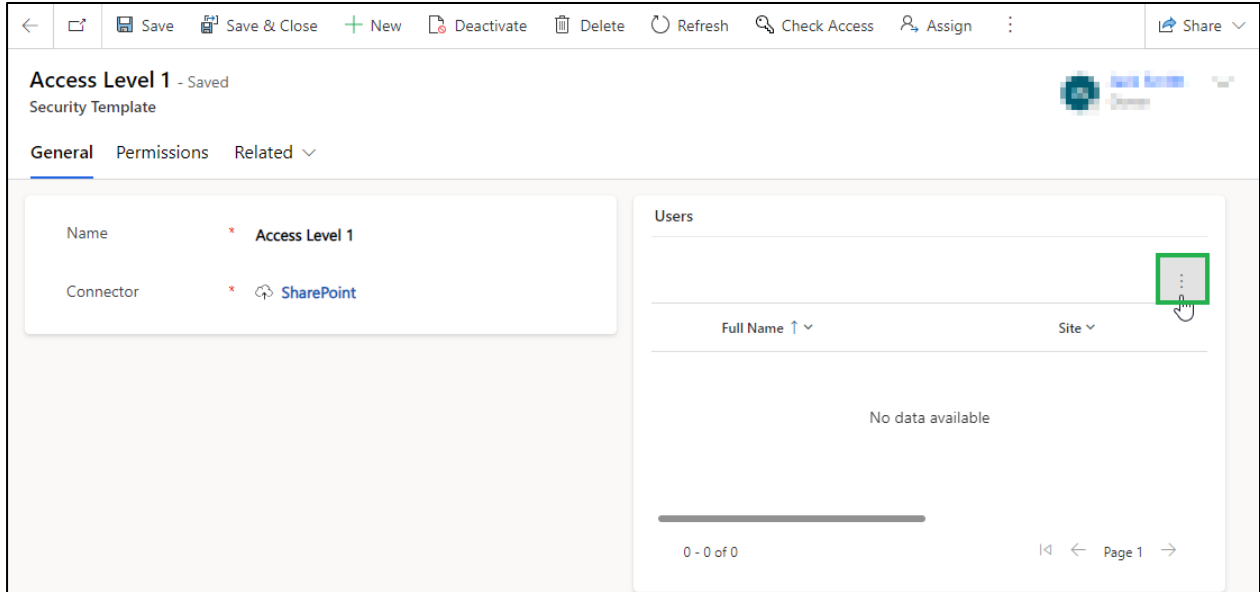
General Permissions

Name *	---	Users
Connector *	---	

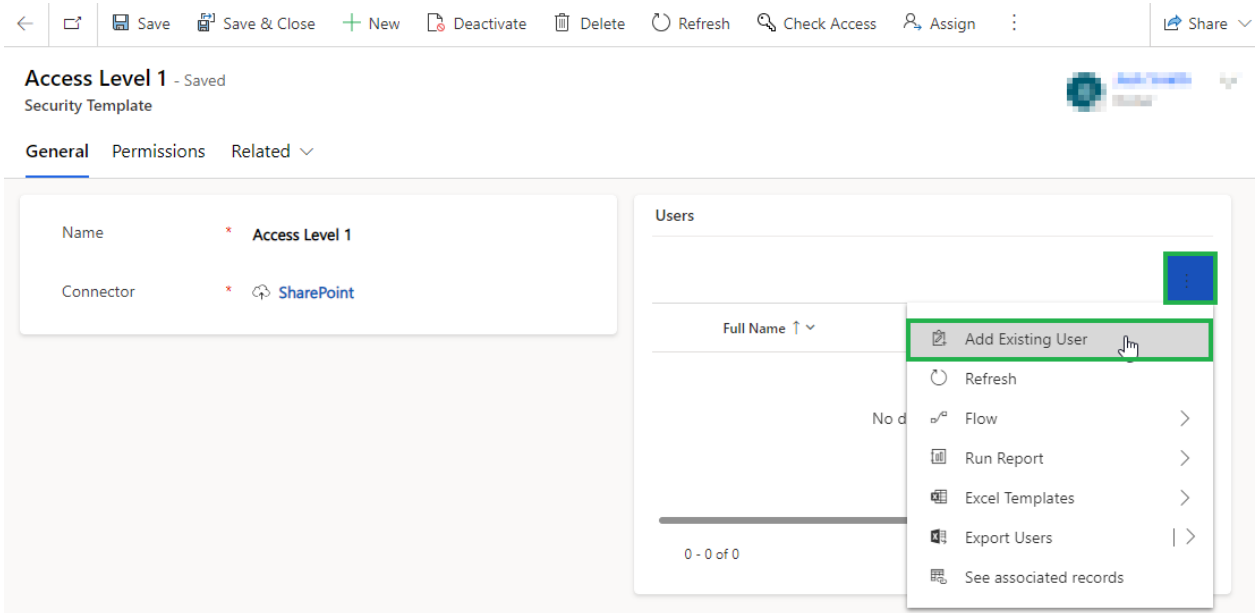
Populate the given fields and save the changes. After the changes are saved you need to select users to whom this security template should apply.

- Click on **Ellipsis**.

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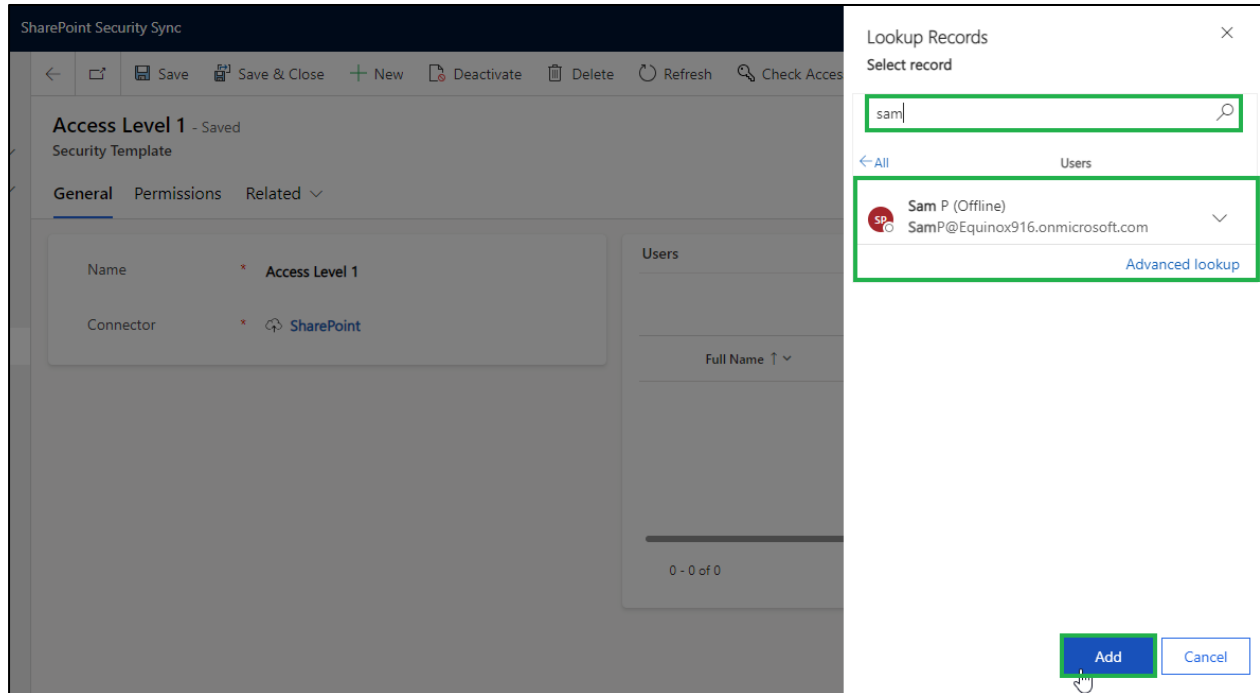


- Click on **Add Existing User**.

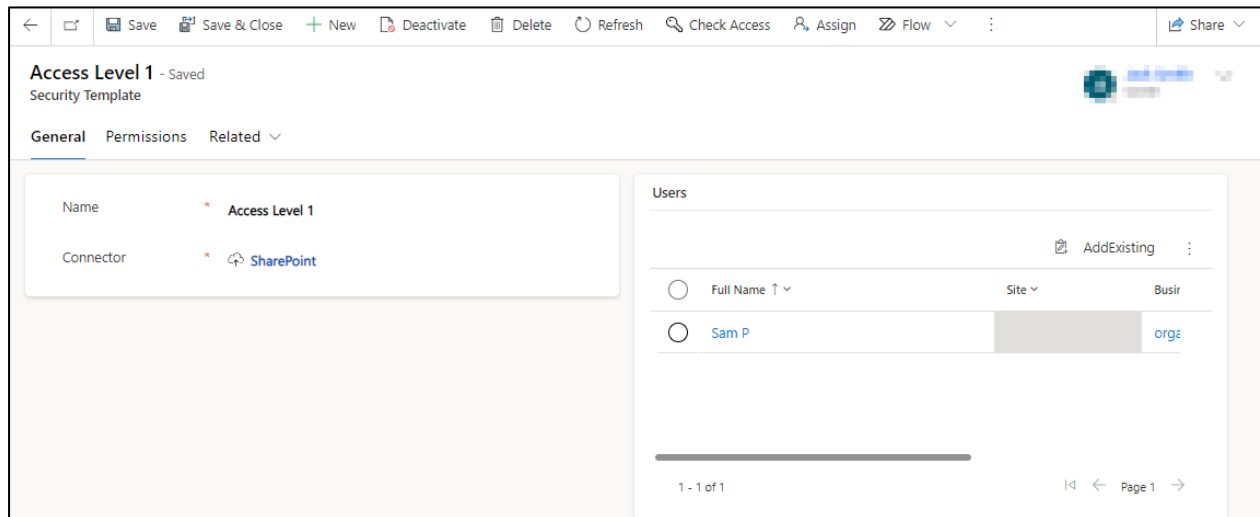


- Select desired user and click on **'Add'**.

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- Now the user has been successfully added.



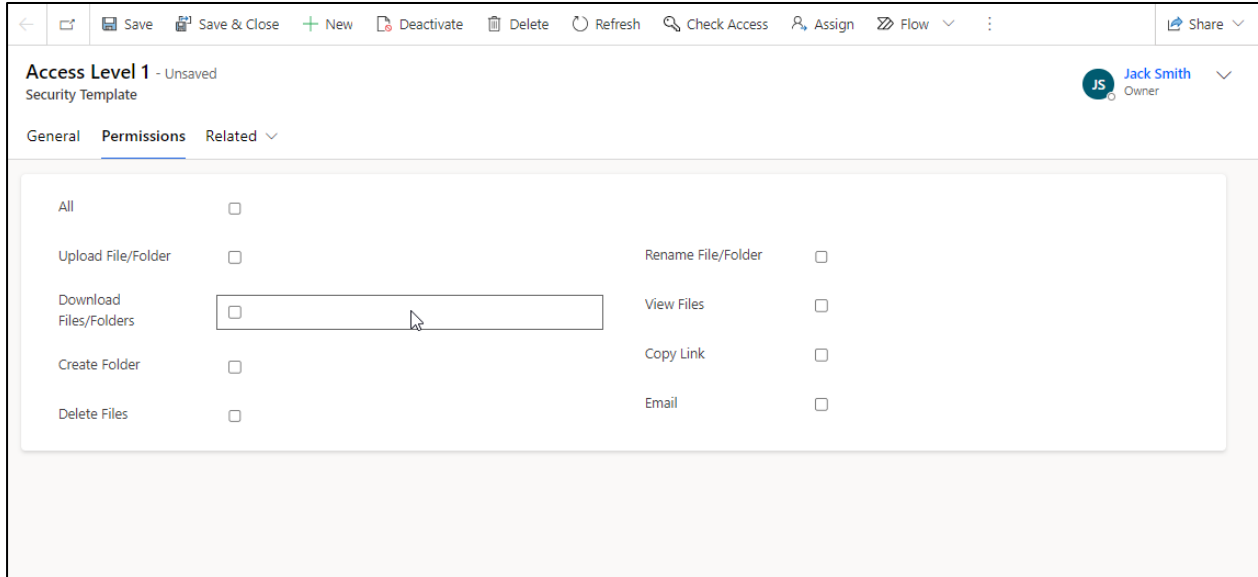
2. Permissions

Next tab is **Permissions**, which comprises all the Attach2Dynamics UI features. To provide access to any specific Attach2Dynamics UI features, just enable the checkbox for that feature on permissions tab.

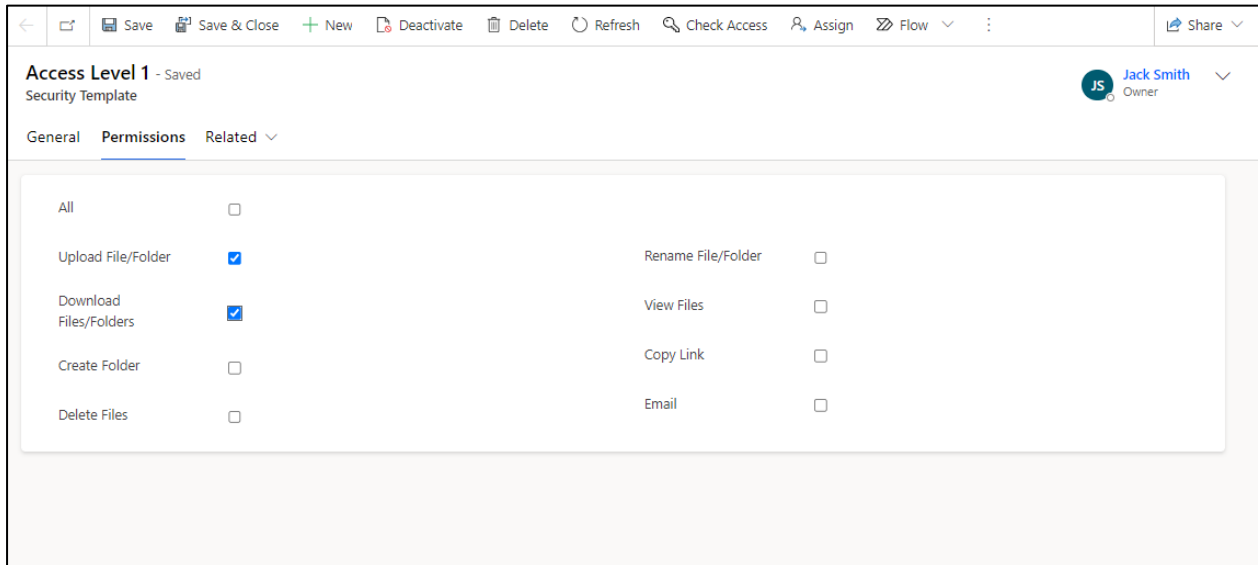
To provide a user access to Upload Files/Folders and Download Files/Folders features of Attach2Dynamics UI.

- Then, Navigate to Permissions tab.

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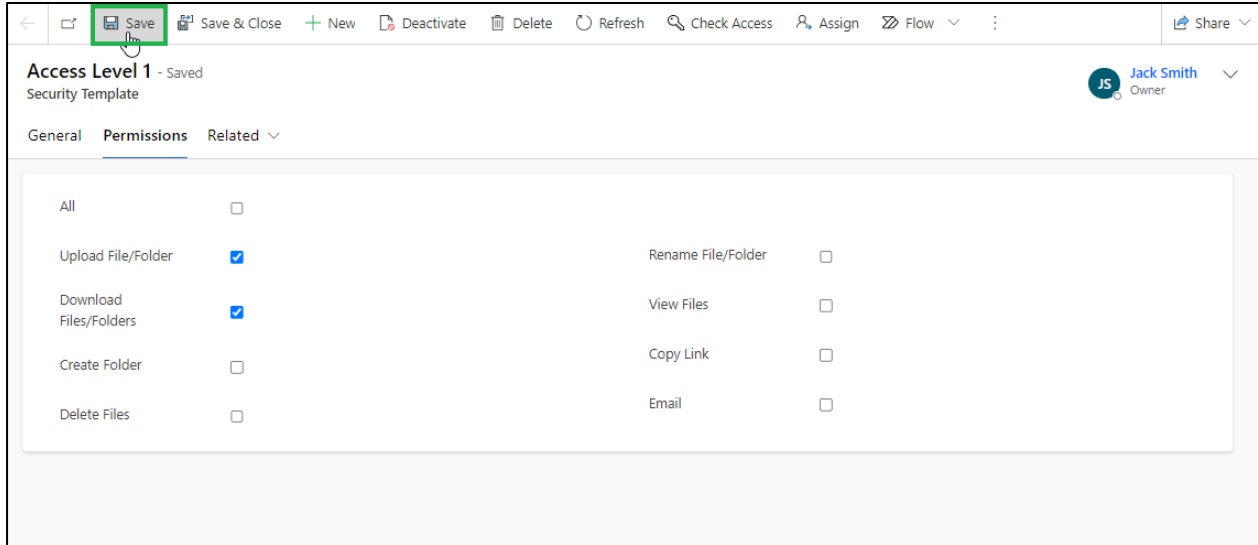


- Enable checkbox for Upload Files/Folders and Download Files/Folders features of Attach2Dynamics UI.

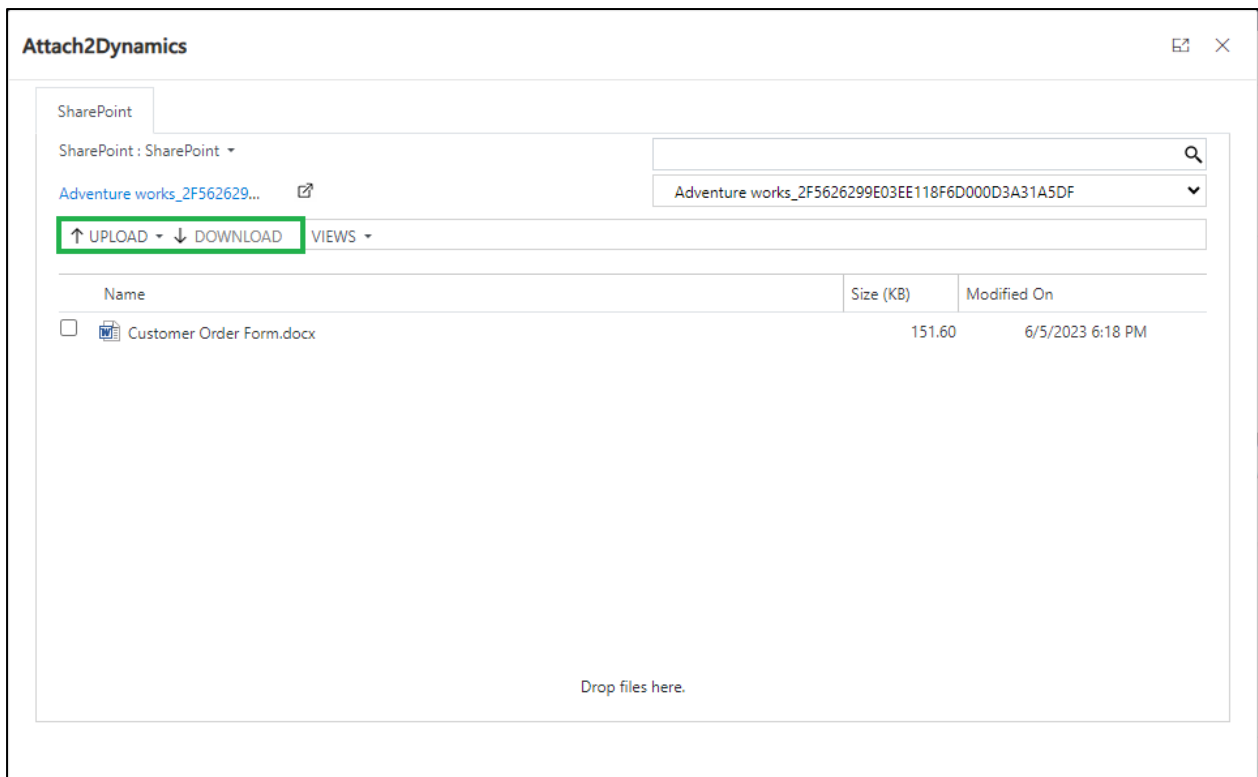


After filling the respective fields, click on 'Save'.

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Now the user will be granted access to Upload Files/Folders and Download Files/Folders features of Attach2Dynamics UI.



Note:

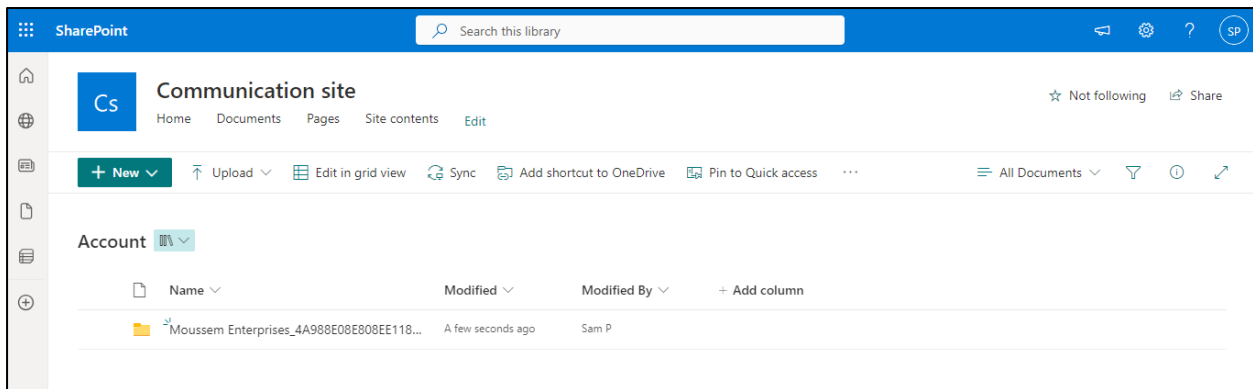
- If no template is created for a user, then all the features would be enabled except the Delete feature.
- For Delete feature a Security Template is must.

- *User permissions granted using Security Templates allow users to access various features of Attach2Dynamics UI only.*
- *Permissions given from Security Template are not related to syncing of Security from CRM to SharePoint.*

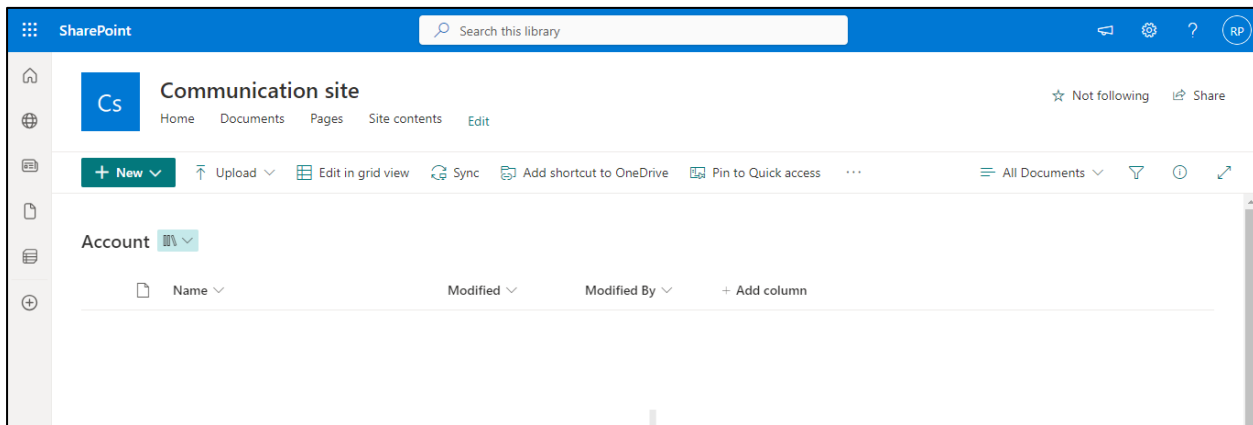
Share and Assign Record

The security role privileges are synced when a record is shared or assigned to another user. For e.g. when a User A (Sam) owns a record and other User B (Rhea) has only user level access, then Rhea won't be able to see the records owned by Sam in SharePoint.

For instance, records visible to Sam are:

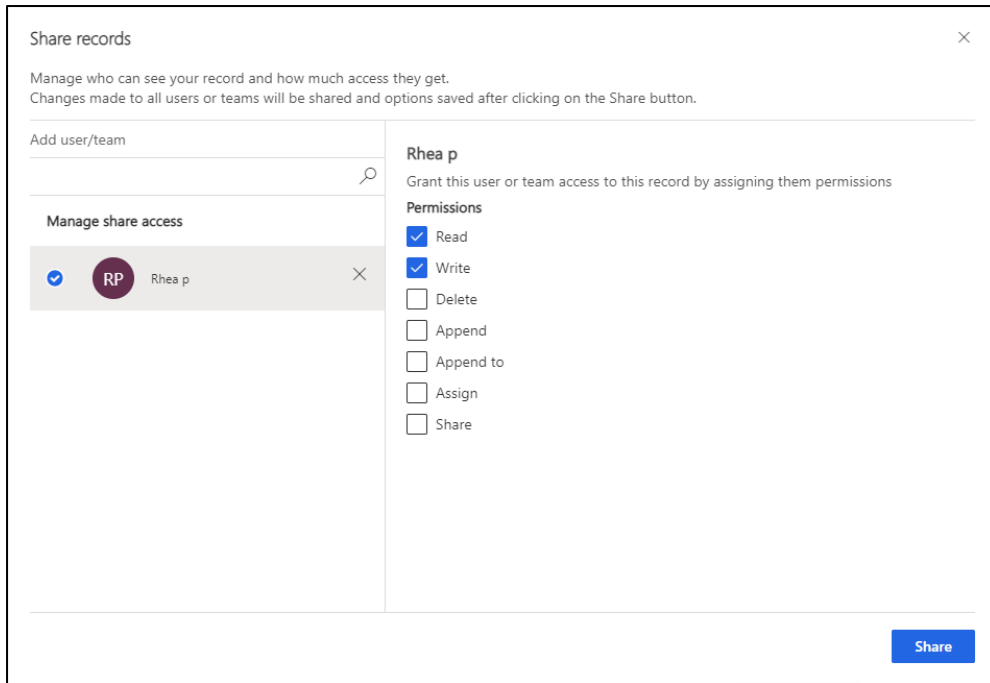
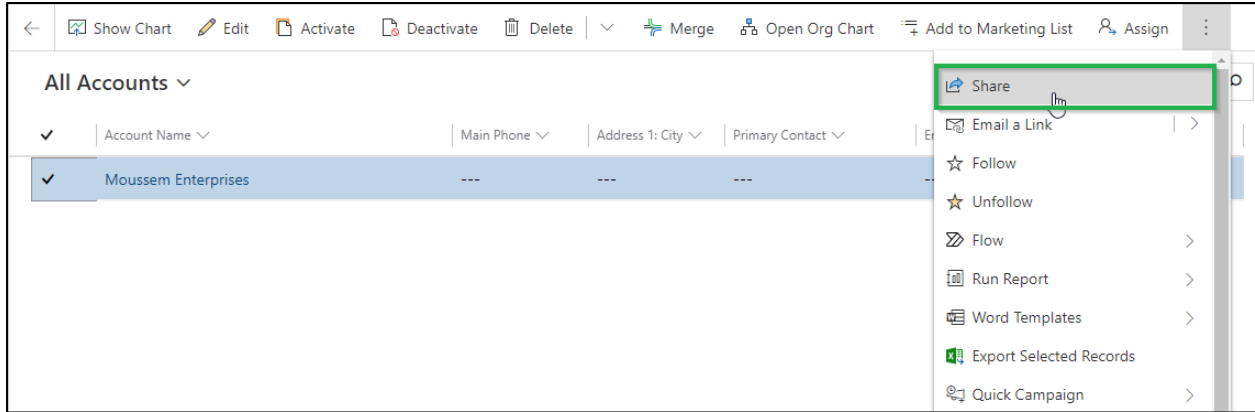


Records visible to Rhea:

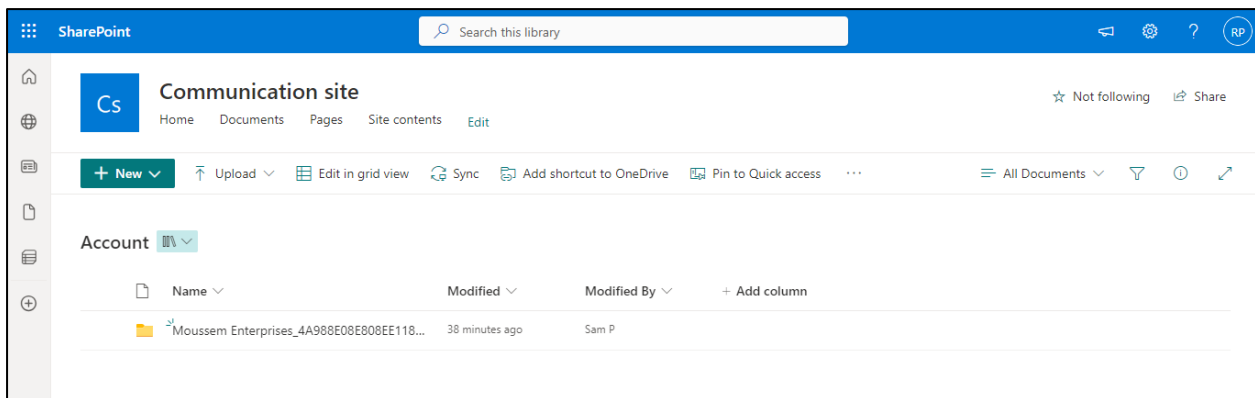


Now Sam shares the record with Rhea.

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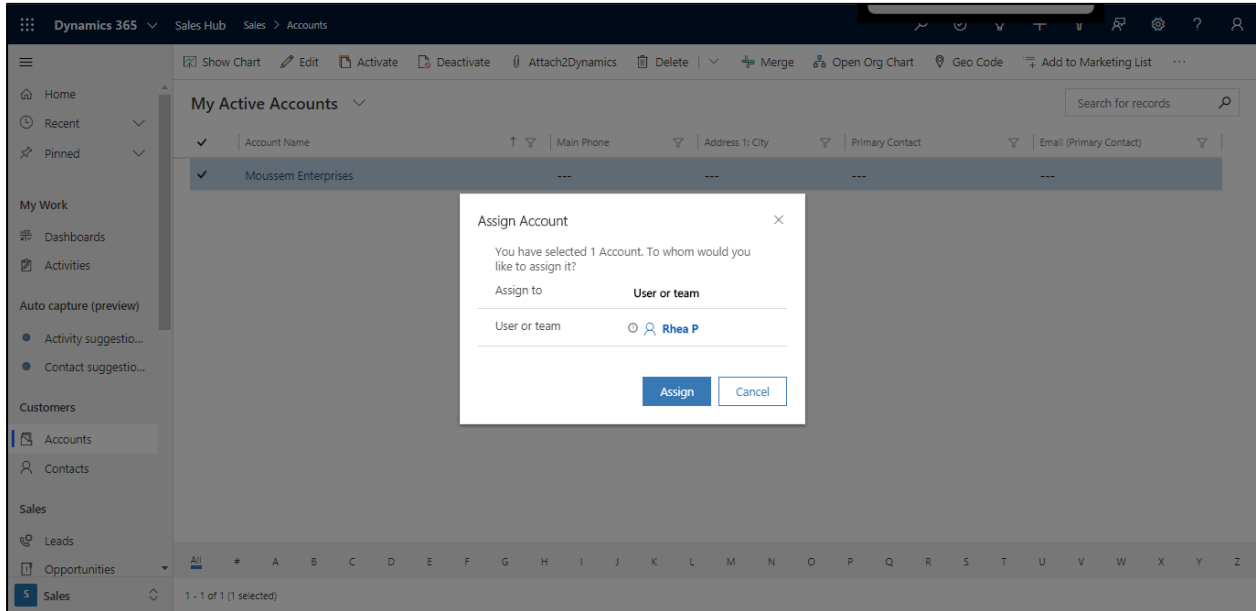


After the records are shared with Rhea she will be able to view the records owned and shared by Sam in SharePoint.



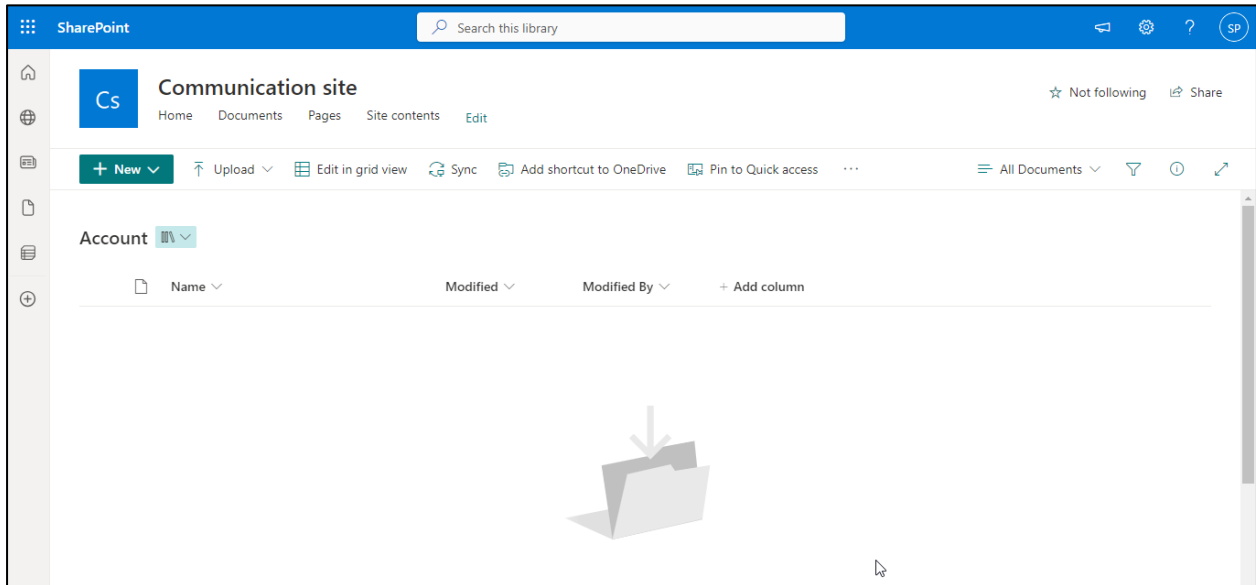
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Now due to some business requirement Sam assigns the record to Rhea.

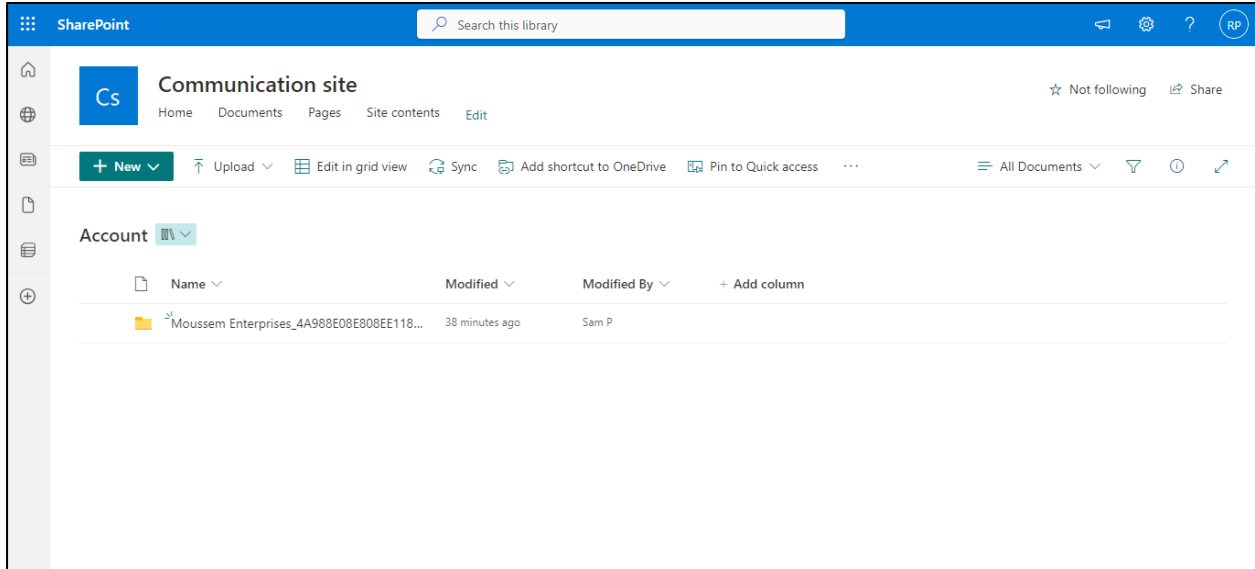


The record will not be visible to Sam anymore and will be assigned and visible to Rhea in SharePoint.

Visibility of records to Sam after record is assigned to Rhea:



Now that record is assigned to Rhea, visibility of record to her:



Modify Security Role

Apart from sharing and assigning records, we can also modify the security roles in Dynamics 365 which will be replicated in SharePoint. To understand this better, we have created two Business Units apart from root business unit that are: Marketing and Sales. Sales is the parent business unit of Marketing and in this example, we are working with Account entity.

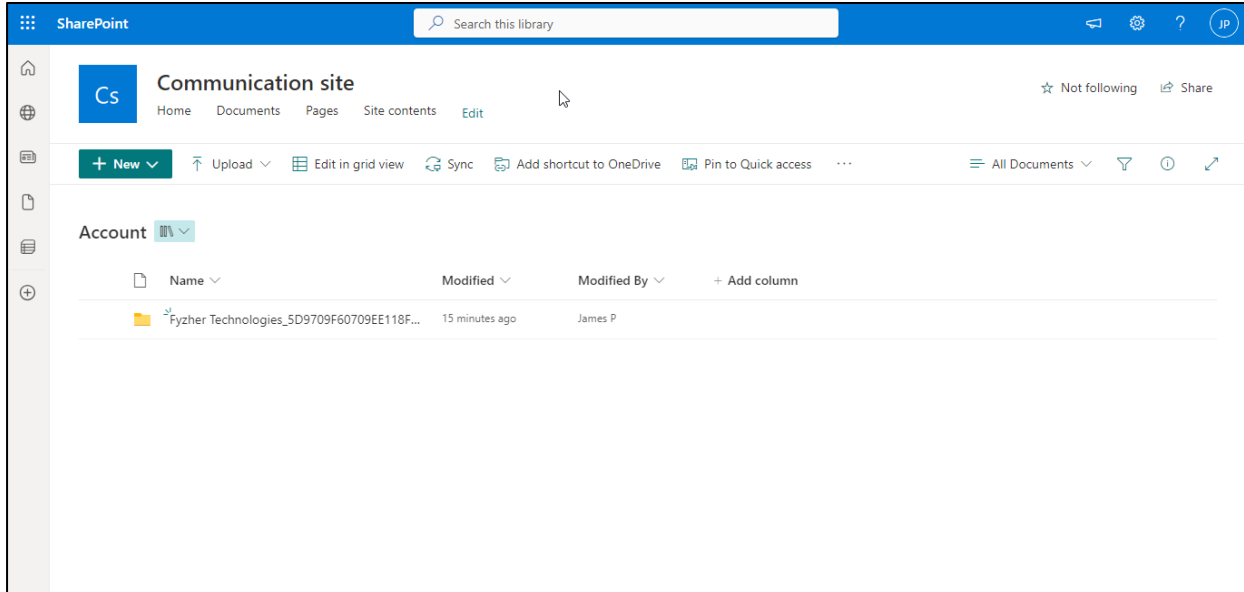
Now, Sales BU has two users, James and Rhea. James is salesperson who has user level read/write access and Rhea as a Sales Manager has Business Unit read/write access.

Marketing BU has one user Joe who is Marketing Manager and has organization level read/write access.

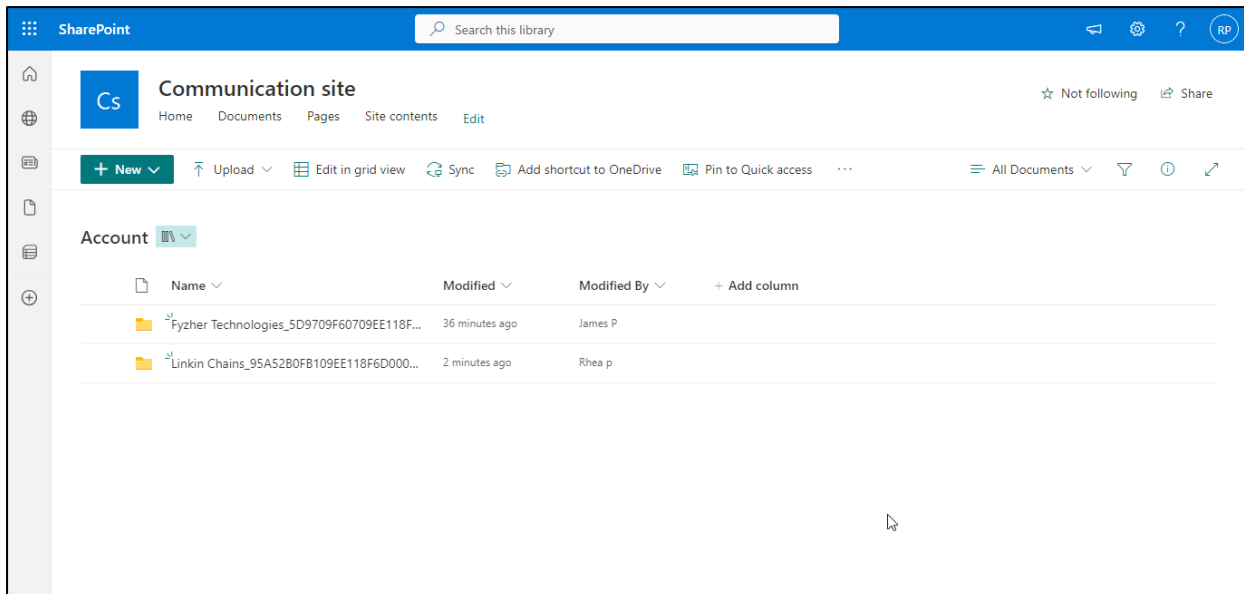
Scenario 1 Visibility:

James: With user level access, he can see only his records.

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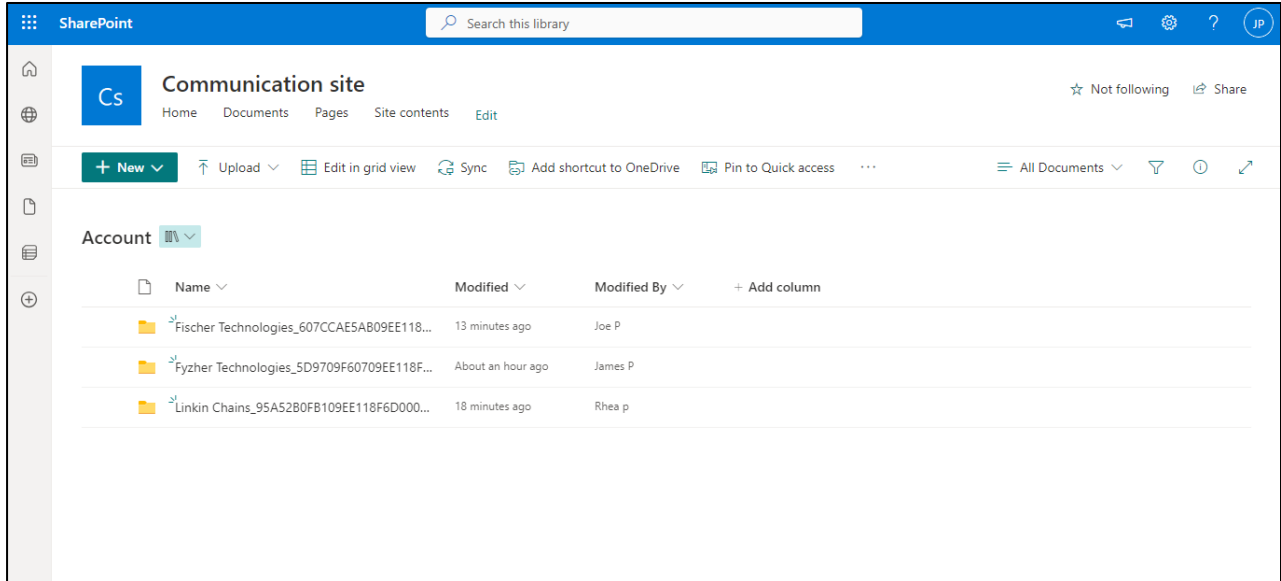


Rhea: With BU level access, she can see her own records and also see James records, who is present in the same BU.

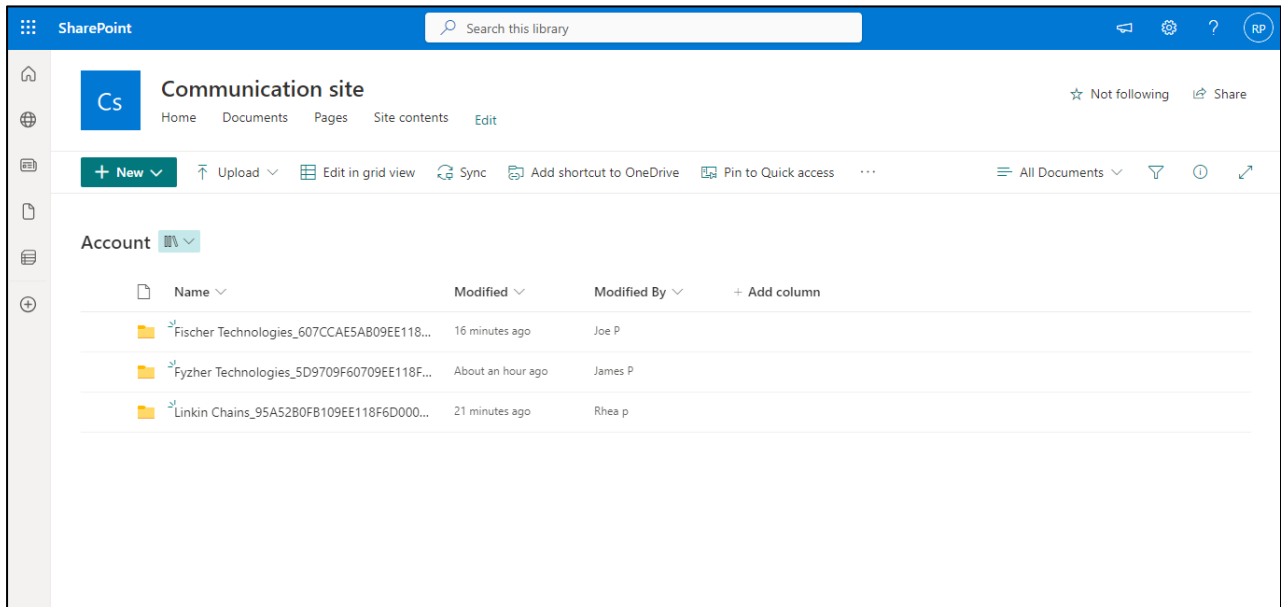


Joe: With org level access, he can see all the records created by each user present in the organization.

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Scenario 2 Visibility: Now we change the access level of Rhea to Parent Child Business Unit, and keep the security level access of Joe and James the same. With this Rhea will be able to see the records of both Joe and James.



Apart from these modifications the user level access comes into action even when a security role is associated/dissociated to/from a user/team or a member is added/removed from a team or security role deleted.

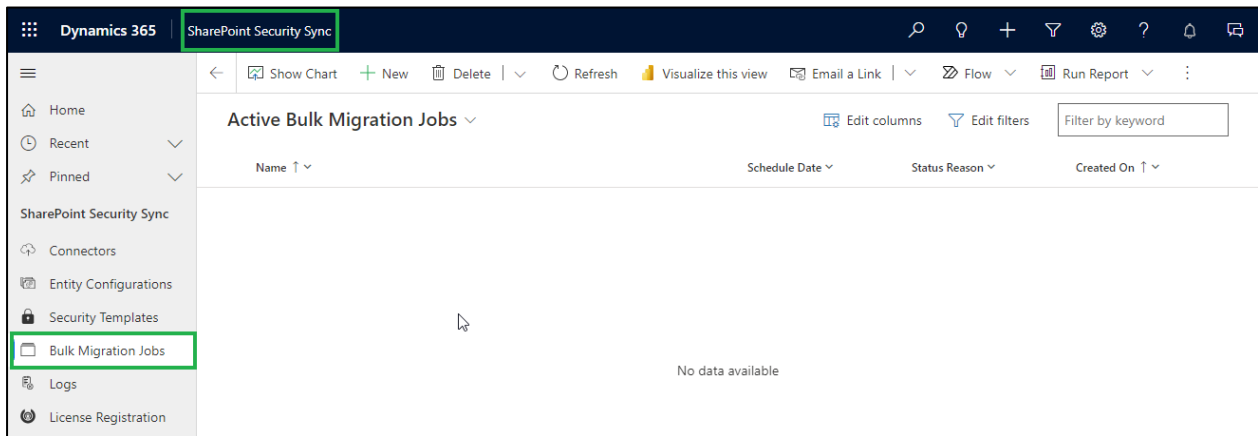
Bulk Migration Jobs

Bulk Migration Job Entity enables users to configure the bulk movement of the attachments from CRM to SharePoint and also it shows the details and status of the migrating attachments of Activities/Notes/Sales Literature.

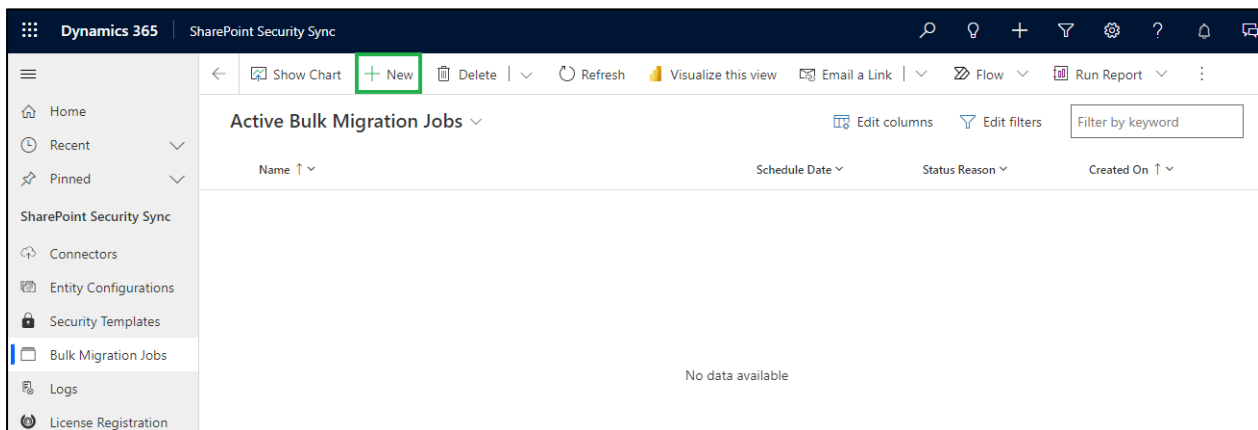
Note:

- Users are advised to do the migration during off business hours for minimum interruption as there may be bulk of data to be moved.
- Only the Entities where the Attachment Action is defined as Move or Copy in the Entity Configuration will be considered for Bulk Migration.

To configure **Bulk Migration Job**, go to **SharePoint Security Sync App --> Bulk Migration Jobs**.



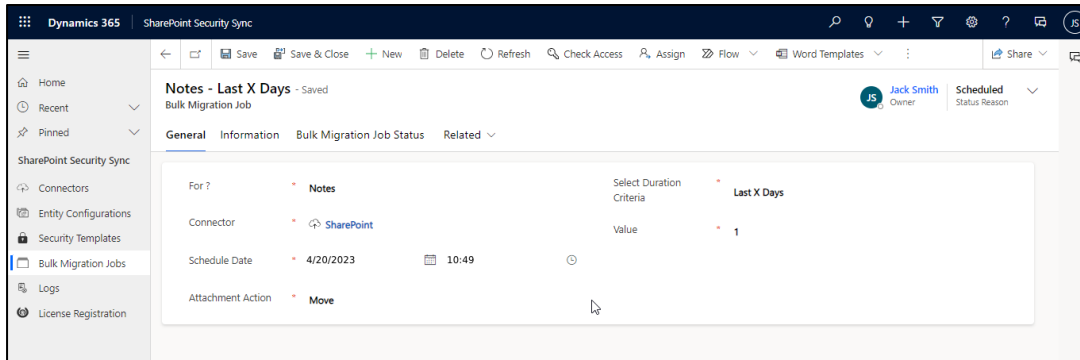
Click on '+New'.



Fill the respective fields.

1. General

This section is where you define the period and Activities/Notes/Sales Literature attachment we are moving to SharePoint.

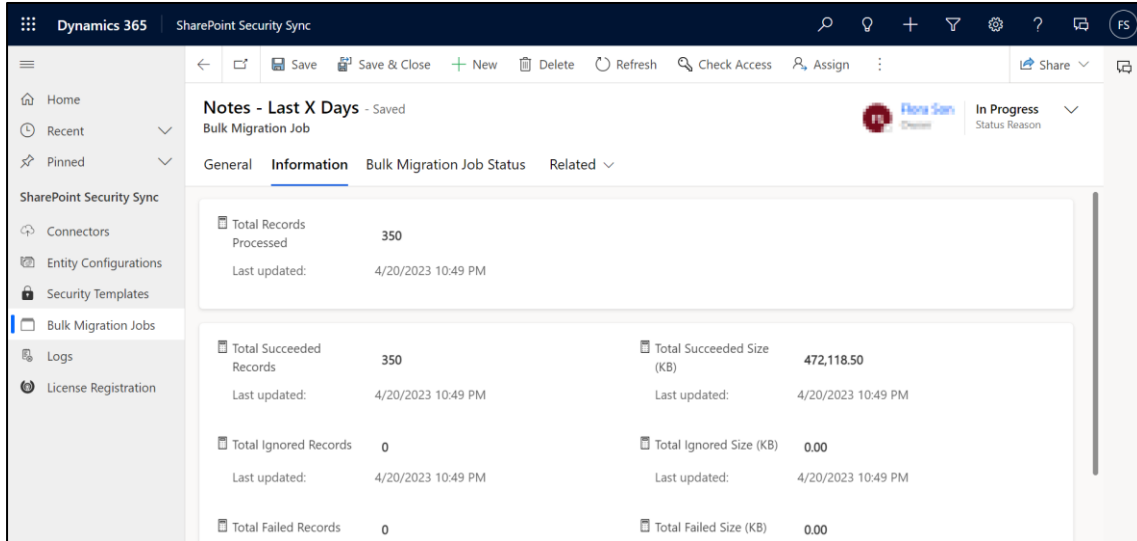


- 1. For?:** This specifies whether we are doing **Bulk Migration** for **Activities, Notes or Sales Literature**.
- 2. Connector:** In this field we specify the connector support i.e. SharePoint.
- 3. Schedule Date:** Scheduled date keeps track of the date from which the migration job will start.
- 4. Attachment Action:** In this field we specify the action ie. Copy or Move.
- 5. Select Duration Criteria:** In this field we specify the period for which we have to migrate Note Attachments/Activity Attachments/Sales Literature Attachments to SharePoint. Here, X represents Numeric Value. For e.g. Last 10 days, Last 3 weeks, etc. where the number 10 and 3 specify the Value.
 - a) Last X Days:** Specify data of how many(X) days have to be migrated to SharePoint.
 - b) Last X Weeks:** Specify data of how many(X) weeks have to migrate to SharePoint.
 - c) Last X Months:** Specifies data of how many(X) months have to be migrated to SharePoint.
 - d) Last X Years:** Specifies data of how many(X) years has to be migrated to SharePoint.
 - e) Older Than:** This moves all the Note Attachments/Activitiy attachments prior and inclusive of the date SharePoint.
 - f) Custom:** This specifies the period **Process From** date to **Process Till** date between which the data is to be moved to SharePoint.

Note: The Notes and Sales Literature Attachments will be moved to their corresponding record folder and Activity attachments will move to a common folder named **Activity Attachment or Regarding Folder**.

2. Information

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The next tab is **Information** that comprises the details of processed records.

- 1) **Total Records Processed:** Total number of Activities/Notes/Sales Literature attachment that are processed.
- 2) **Total Succeeded Records:** Total number of records that have successfully migrated to SharePoint.
- 3) **Total Ignored Records:** Number of records that were ignored.
- 4) **Total Failed Records:** Total number of records that failed in the process of migration.
- 5) **Total Succeeded Size (KB):** The size of records that were moved to SharePoint. This tells the Dynamics 365 CRM user how much space he has freed from the CRM.
- 6) **Total Ignored Size (KB):** This is the size of files that were ignored while migrating to SharePoint.
- 7) **Total Failed Size (KB):** Size of failed files while uploading to SharePoint.

Visibility of Attach2Dynamics button

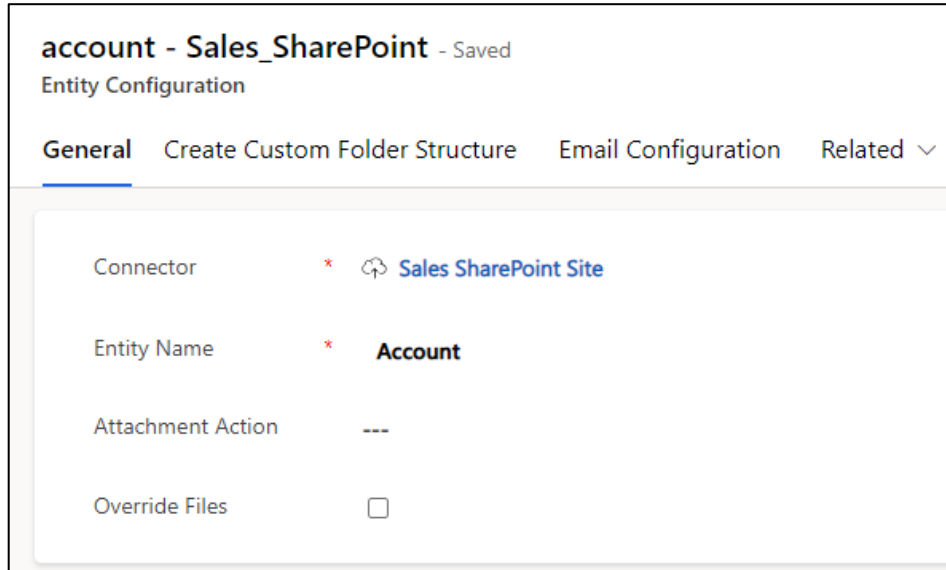
Attach2Dynamics button is visible only if;

- 1) Logged in User is either has SharePoint Security Sync User or Administrator role
- 2) Entity Configuration record exists for that entity and is in active state.

Use of Attach2Dynamics

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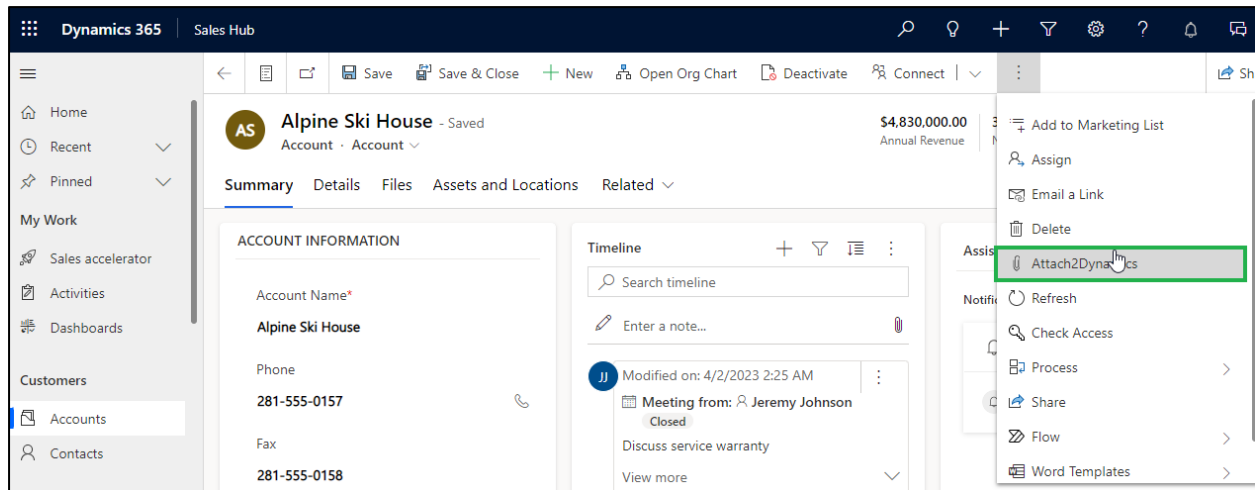
Once Entity Configuration record is created user can start using Attach2Dynamics. Let's take an example of Account entity. Suppose Entity configuration record for Account entity with SharePoint connector is created.



The screenshot shows the 'Entity Configuration' form for 'account - Sales_SharePoint'. The form is titled 'Entity Configuration' and has tabs for 'General', 'Create Custom Folder Structure', 'Email Configuration', and 'Related'. The 'General' tab is selected. The form contains the following fields:

- Connector: * Sales SharePoint Site
- Entity Name: * **Account**
- Attachment Action: ---
- Override Files:

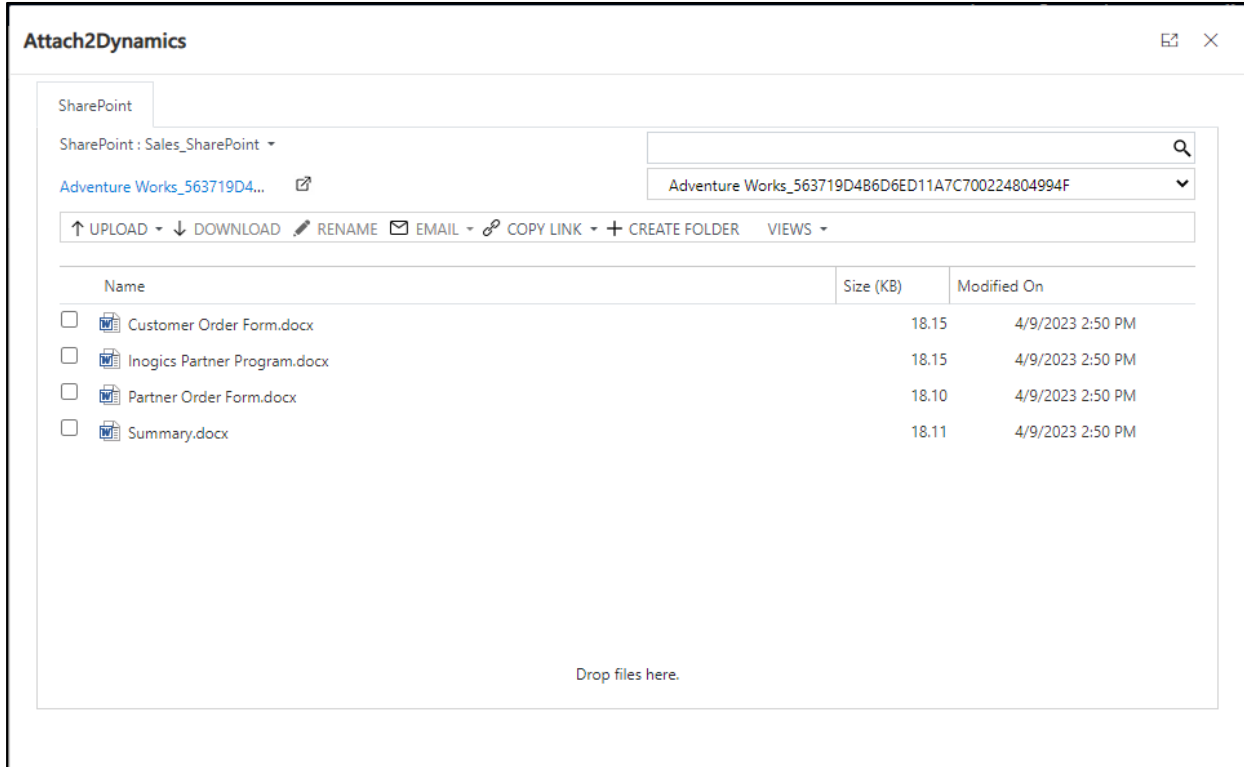
Attach2Dynamics button will be seen in the Command bar.



The screenshot shows the Dynamics 365 interface for the 'Alpine Ski House' account. The command bar at the top right contains several buttons, including 'Attach2Dynamics', which is highlighted with a green box. The account information shows 'Alpine Ski House' with an annual revenue of \$4,830,000.00. The timeline shows a meeting from Jeremy Johnson on 4/2/2023 at 2:25 AM.

On Click of the button, Attach2Dynamics window opens.

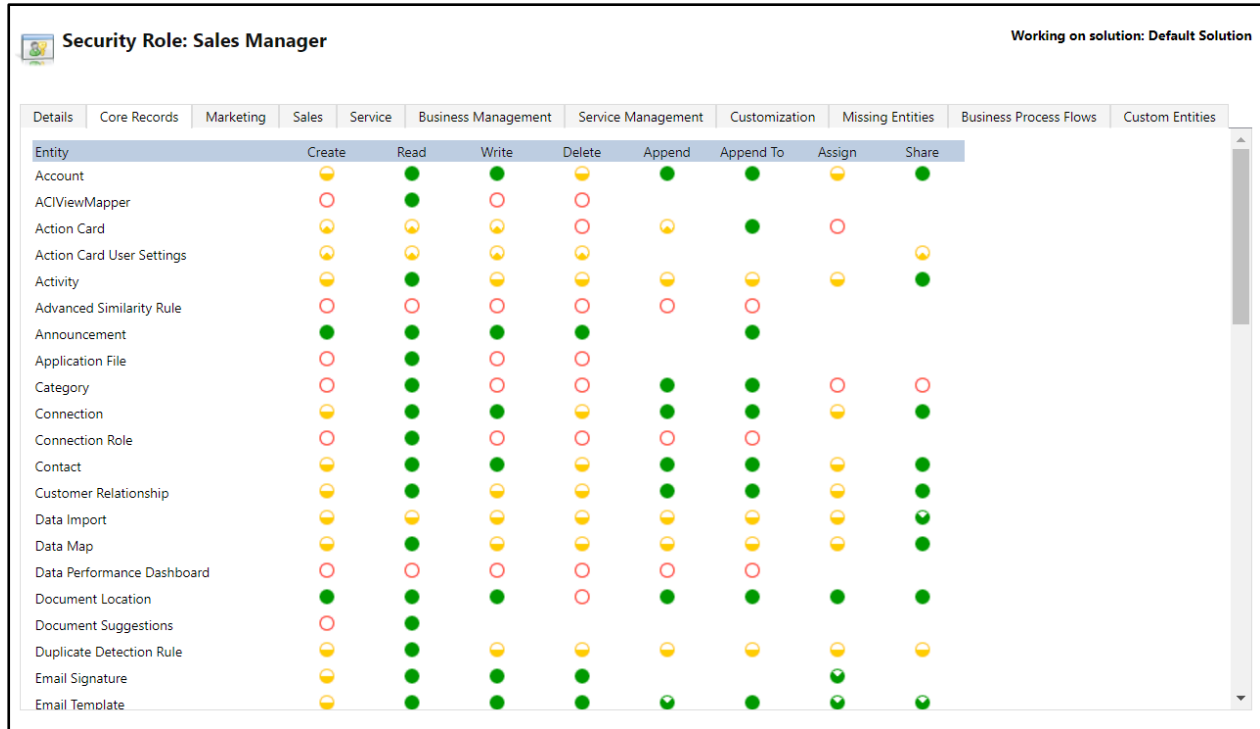
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Below are the features:

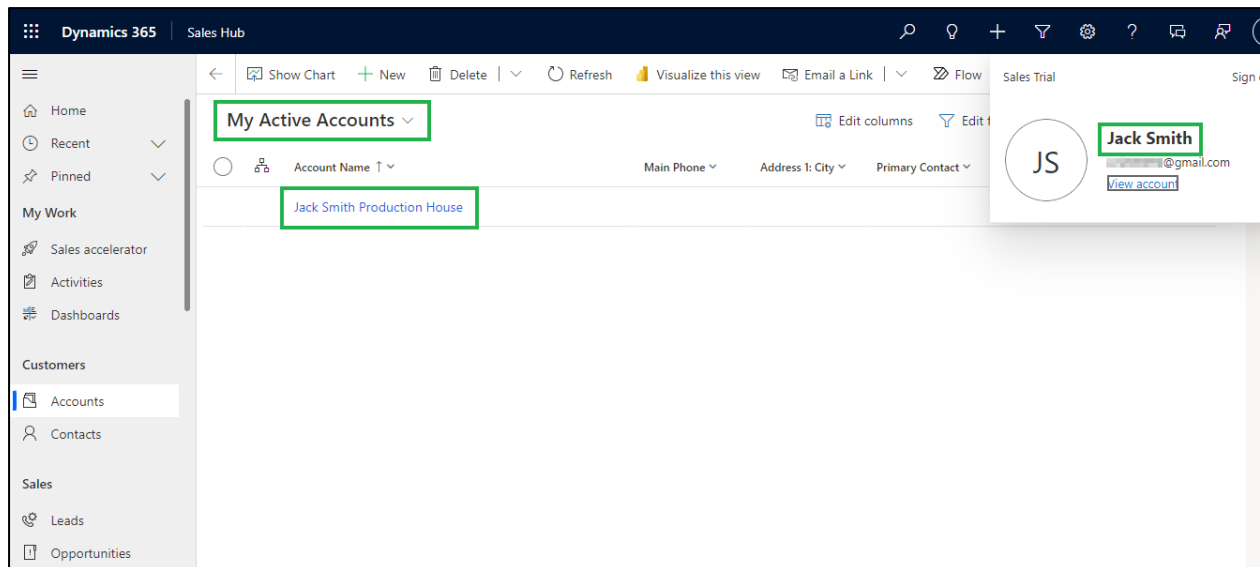
- a) **Sync Privileges** SharePoint Security Sync auto-syncs Dynamics 365 CRM security privileges with that of SharePoint. Any changes made to the security role of a user in Dynamics 365 CRM will be replicated in SharePoint with the help of this SharePoint Security Sync feature.

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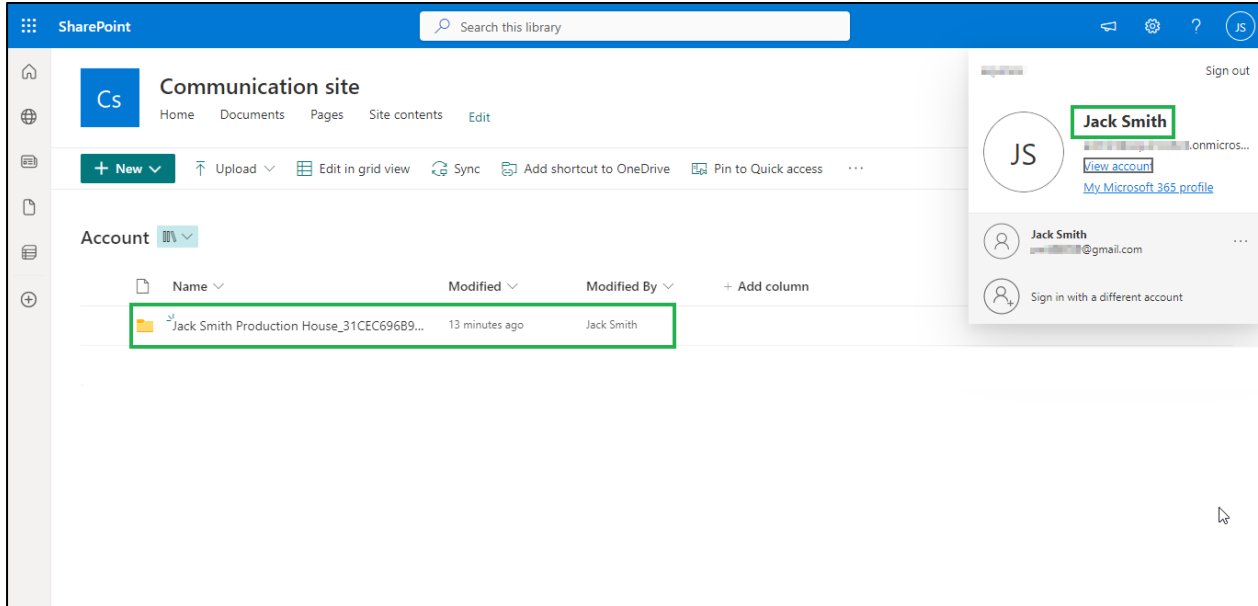
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account	Yellow	Green	Green	Yellow	Green	Green	Yellow	Green
ACIViewMapper	Red	Green	Red	Red	Red	Red	Red	Red
Action Card	Yellow	Yellow	Yellow	Yellow	Yellow	Green	Red	Red
Action Card User Settings	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Activity	Yellow	Green	Yellow	Yellow	Yellow	Yellow	Yellow	Green
Advanced Similarity Rule	Red	Red	Red	Red	Red	Red	Red	Red
Announcement	Green	Green	Green	Green	Green	Green	Green	Green
Application File	Red	Green	Red	Red	Red	Red	Red	Red
Category	Red	Green	Red	Red	Green	Green	Red	Red
Connection	Yellow	Green	Green	Yellow	Green	Green	Yellow	Green
Connection Role	Red	Green	Red	Red	Red	Red	Red	Red
Contact	Yellow	Green	Green	Yellow	Green	Green	Yellow	Green
Customer Relationship	Yellow	Green	Yellow	Yellow	Green	Green	Yellow	Green
Data Import	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Green
Data Map	Yellow	Green	Yellow	Yellow	Yellow	Yellow	Yellow	Green
Data Performance Dashboard	Red	Red	Red	Red	Red	Red	Red	Red
Document Location	Green	Green	Green	Red	Green	Green	Green	Green
Document Suggestions	Red	Green	Green	Green	Green	Green	Green	Green
Duplicate Detection Rule	Yellow	Green	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Email Signature	Yellow	Green	Green	Green	Green	Green	Green	Green
Email Template	Yellow	Green	Green	Green	Green	Green	Green	Green

For example, here in CRM, the user can only see a particular record, '**Jack Smith Production House**' in Account entity.



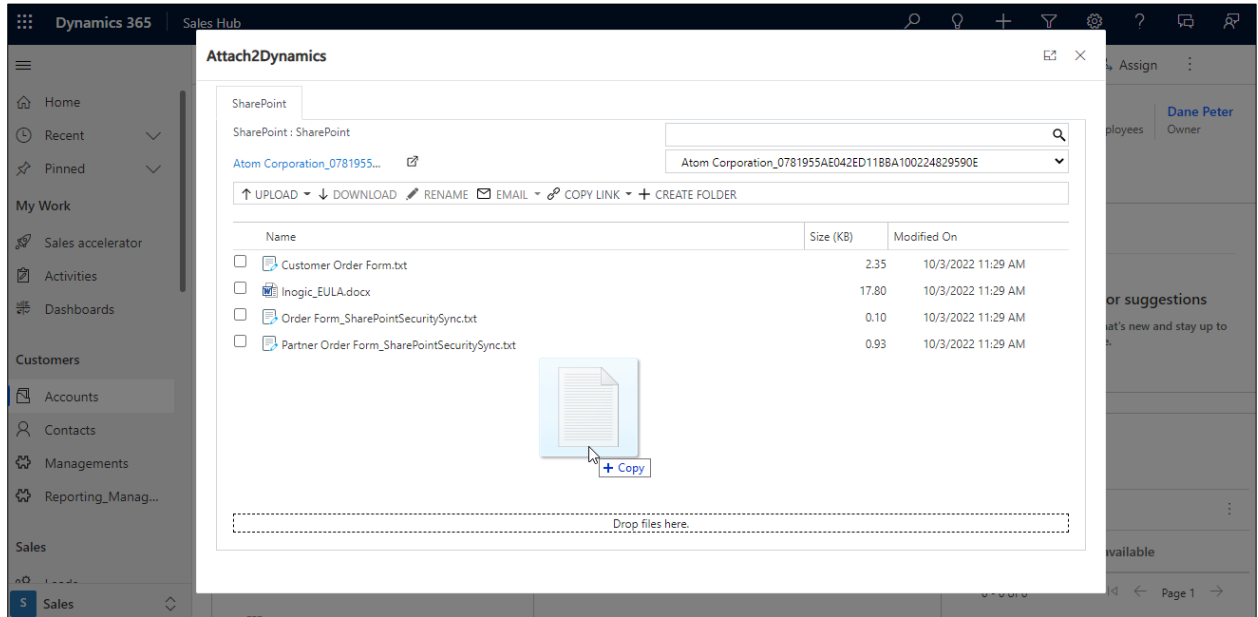
With SharePoint Security Sync, the user will have the same privileges in SharePoint as well, i.e., the user will only be able to see '**Jack Smith Production House**' record of Account entity in SharePoint site.

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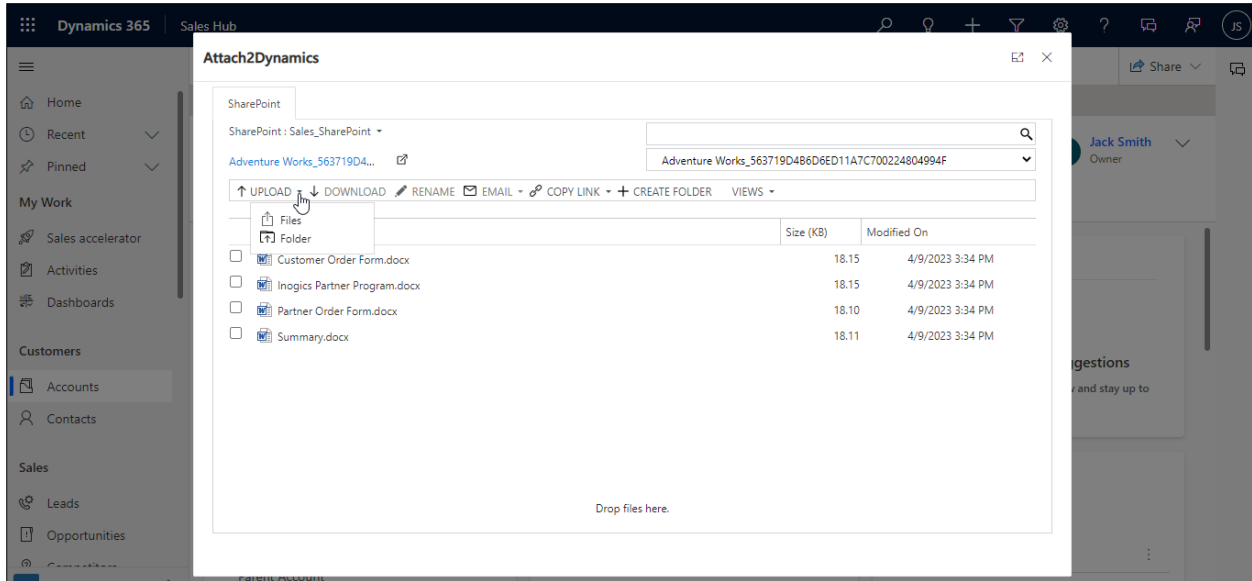
- b) **Drag and Drop Files and Folders:** Users can drag and drop multiple files and folders at one time to SharePoint.

Note: Drag & Drop of files and folders is not supported in IE.

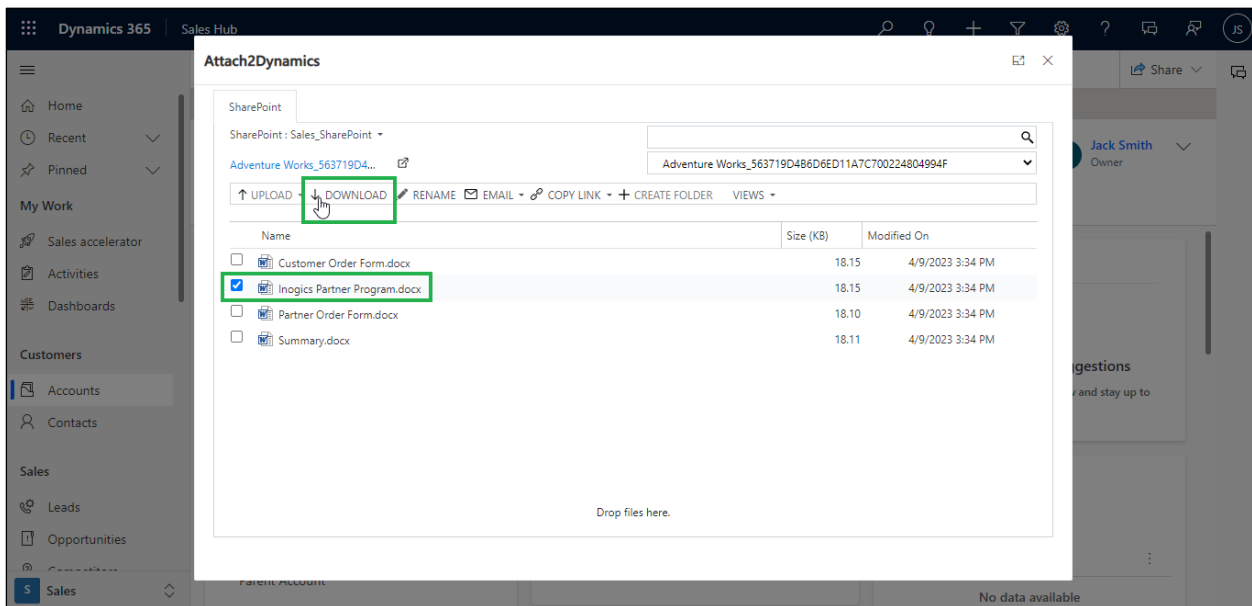


- c) **Upload:** Users can upload multiple files and single folder at a time using the solution. They get user-friendly UI to see the list of files uploaded on SharePoint against the current record. Upload Folder through button is not available on IE.

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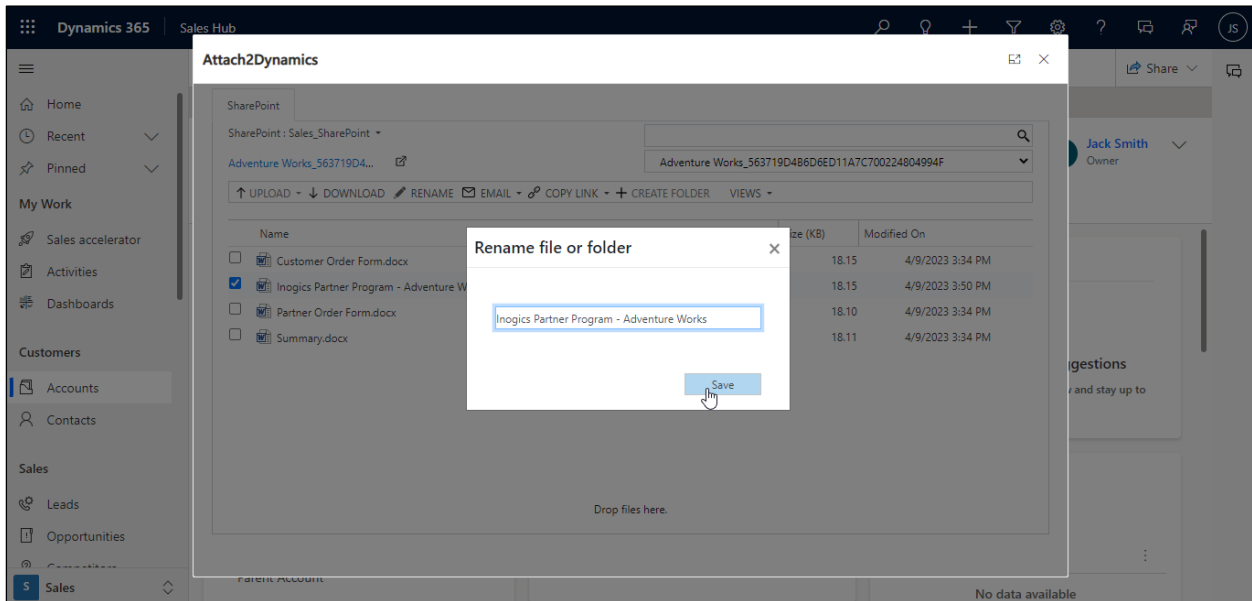
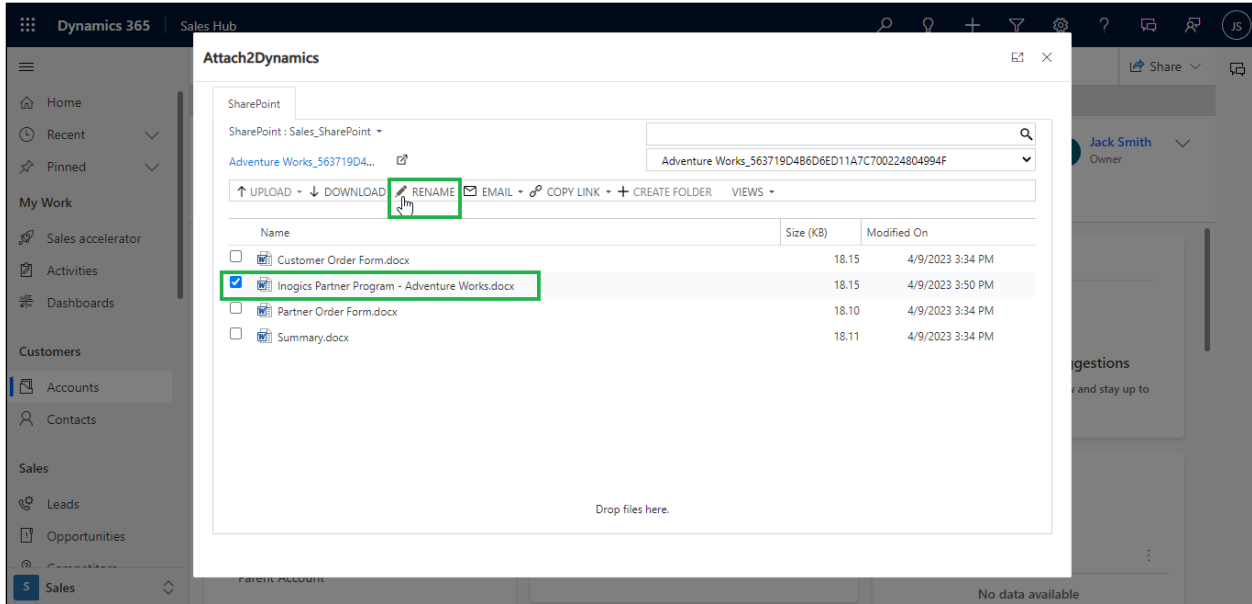


- d) **Download:** Users can get access to all documents of required storage system and download them. Bulk download of files is possible. Download of folder is not supported for SharePoint.



- e) **Rename:** Users have the option to rename the documents by selecting the required files and folders.

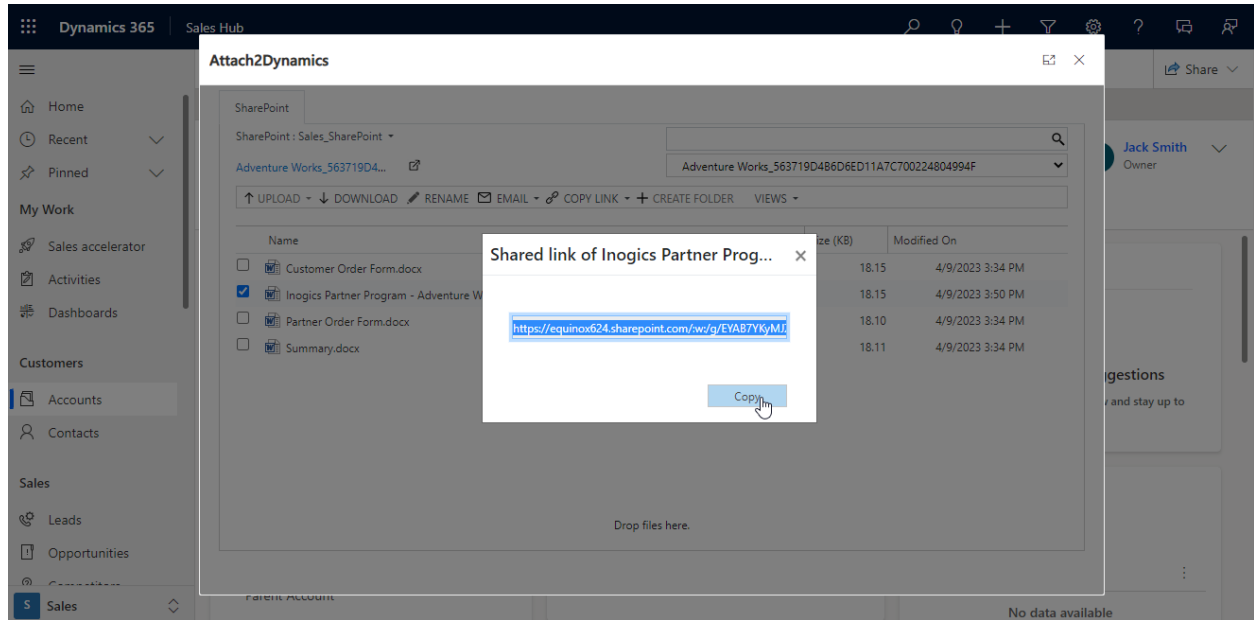
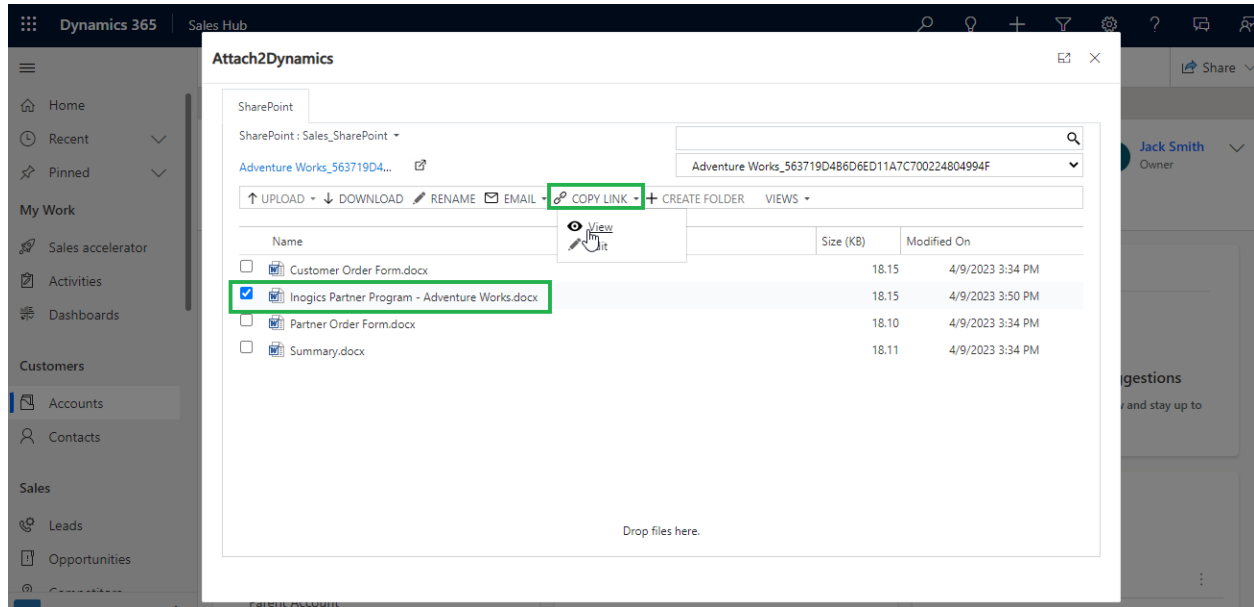
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- f) **Copy Link:** Users can simply copy and paste the generated link for the selected document using this option when required to be sent outside the Dynamics 365 CRM.

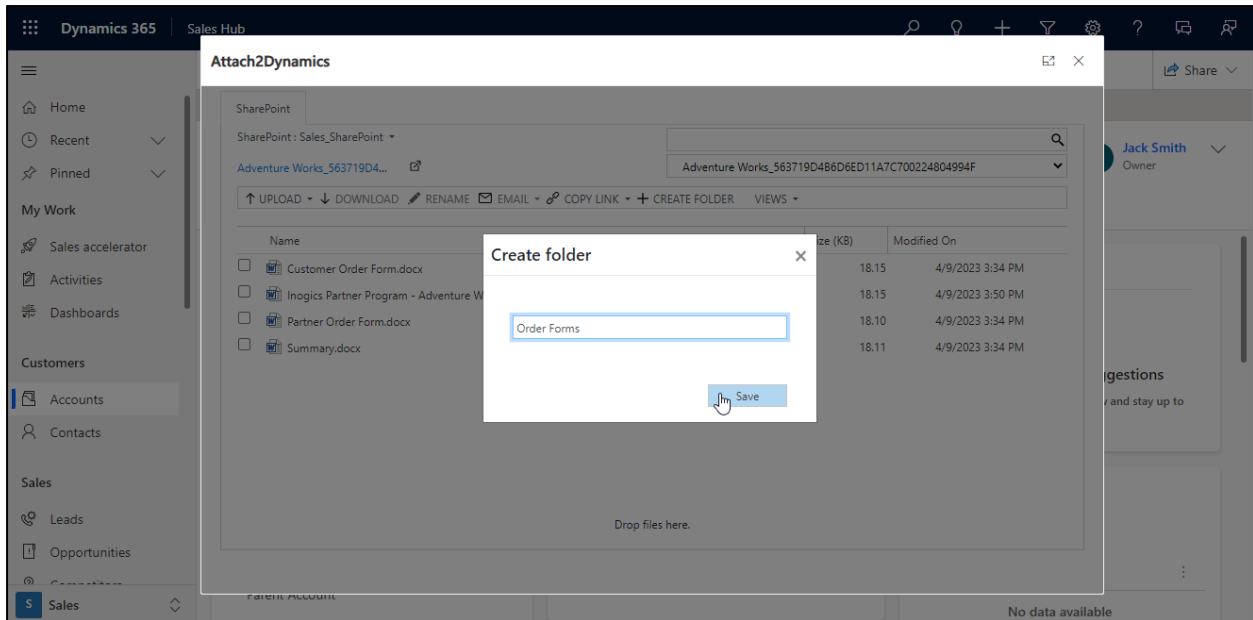
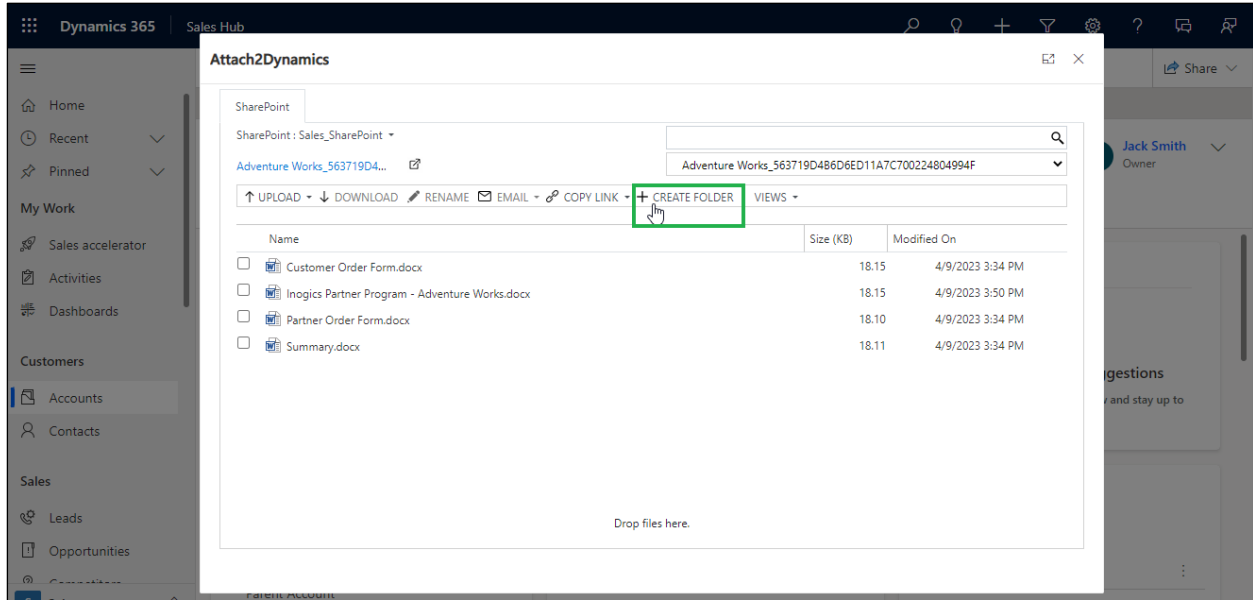
If only **View** is selected then the document is available in read only mode whereas, if **Edit** mode is selected then the document is available for editing.

SharePoint Security Sync – User Manual



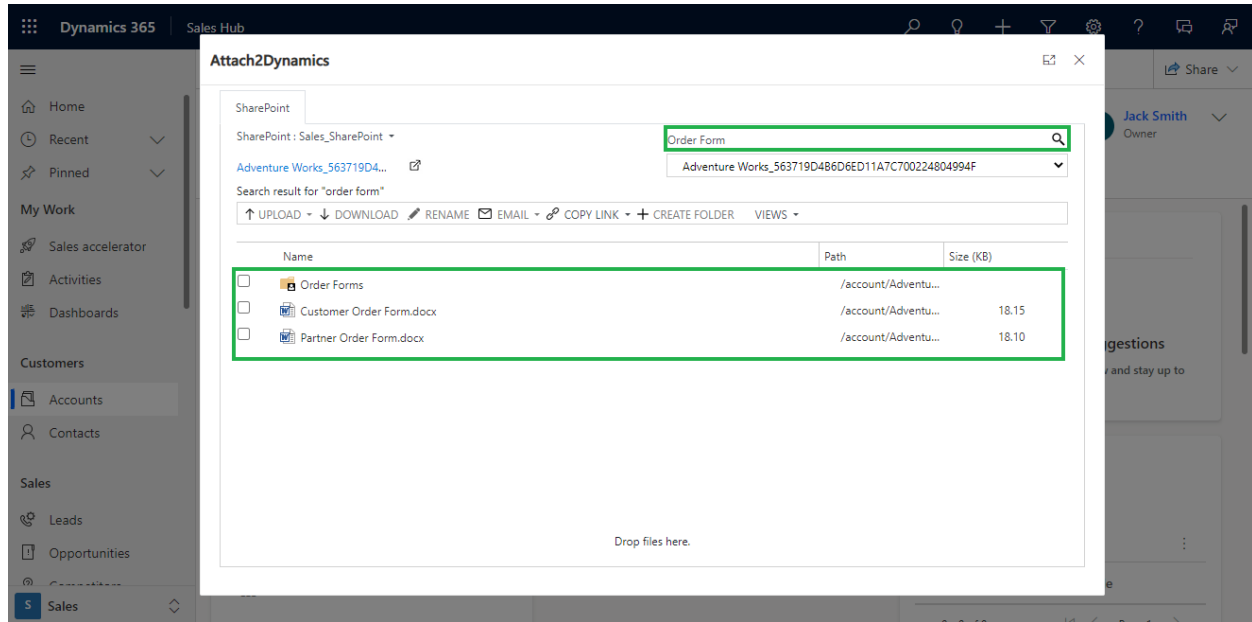
g) Create Folder: Users can create folders in SharePoint as per requirement.

SharePoint Security Sync – User Manual



- h) **Deep search Tab:** Users can deep search for files/folders related to the entered keyword in the search tab and obtain all the documents with the search name in the enlisted file area. Deep search allows you to search for files or folders based on your current path. If you are currently in a **“/A.Datum/Sample”** path and if there are more folders/files inside that path, if you search for any keyword it'll scan till the last file and folder and return the result.

SharePoint Security Sync – User Manual



i) **Move/Copy Dynamics 365 CRM Attachments:** Users can move/copy Dynamics 365 CRM Notes Attachments/Email Attachments and Sales Literature Attachments to SharePoint.

a. **Notes:**

If enabled, it'll move/copy the Note Attachments to the respective entity folder and leave a hyperlink of the path in Note Body. By clicking on the link, users can navigate to the respective SharePoint folder where the attachments are stored.

Copy:

SharePoint Security Sync – User Manual

The screenshot shows a Microsoft Dynamics 365 account record for 'A Datum'. The top navigation bar includes the account name, 'Account · Account', and user information for 'Jack Smith, Owner'. Below the navigation are tabs for 'Summary', 'Details', 'Files', 'Assets and Locations', and 'Related'. The main content area is divided into three columns: 'ACCOUNT INFORMATION' on the left, a 'Timeline' in the center, and 'Assistant' on the right. The 'Timeline' section is highlighted with a green border and contains a note from Jack Smith dated 5/30/2023 at 3:47 PM. The note text is: 'Note modified by Jack Smith', 'File Name : Customer Order Form.PDF', and 'Customer Order Form.PDF'. A mouse cursor is pointing at the file name. The 'Assistant' section on the right shows 'No notifications or suggestions' and 'No data available' under the 'CONTACTS' heading.

The screenshot shows a SharePoint library view for the account 'A-Datum_69318FF41DFEED118F6E000D3A32CECD'. The top navigation bar includes 'SharePoint', a search box, and the site title 'Communication site'. Below the navigation are tabs for 'Home', 'Documents', 'Pages', 'Site contents', and 'Edit'. The main content area shows a table with columns for 'Name', 'Modified', and 'Modified By'. A file named 'Customer Order Form.PDF' is listed in the table, with a modification time of '5 minutes ago' and 'Jack Smith' as the modifier. The file name in the table is highlighted with a green border.

Move:

SharePoint Security Sync – User Manual

The screenshot shows a Microsoft Dynamics 365 account record for 'A Datum'. The top navigation bar includes the account name, 'Account · Account', and user information for 'Jack Smith' (Owner). Below the navigation bar are tabs for 'Summary', 'Details', 'Files', 'Assets and Locations', and 'Related'. The main content area is divided into three columns. The left column, 'ACCOUNT INFORMATION', lists fields like 'Account Name*', 'A Datum', 'Phone', 'Fax', and 'Website'. The middle column, 'Timeline', shows a notification: 'Note modified by Jack Smith' with a file name 'Inogic partner program.PDF' and a timestamp 'Modified on: 3:06 PM'. The right column, 'Assistant', shows 'No notifications or suggestions'.

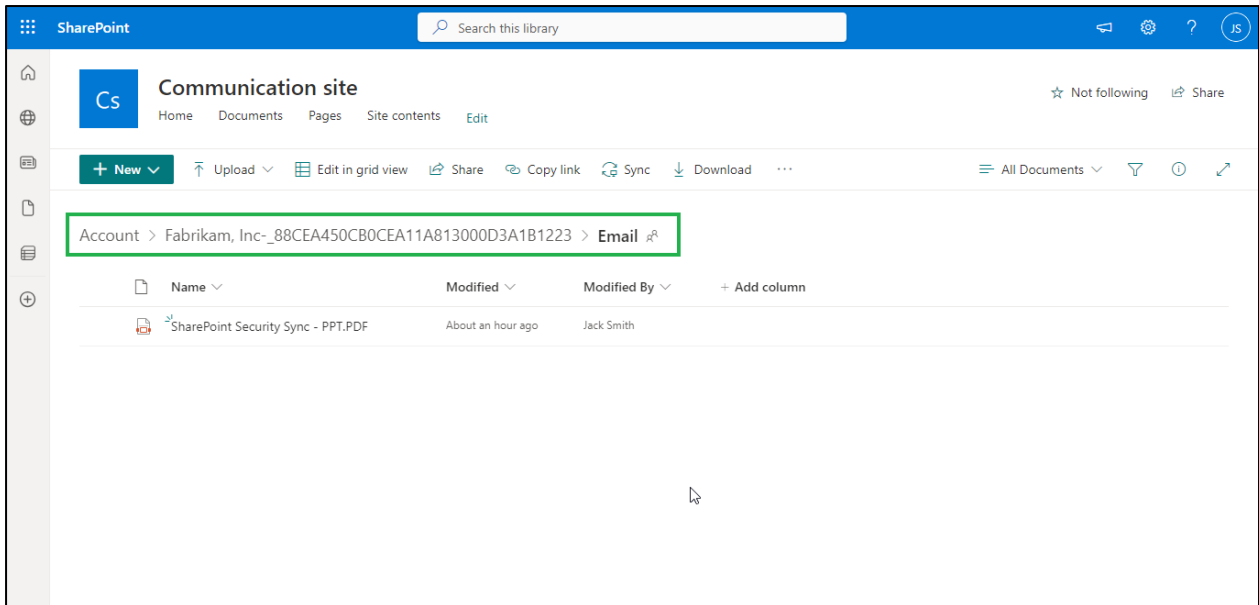
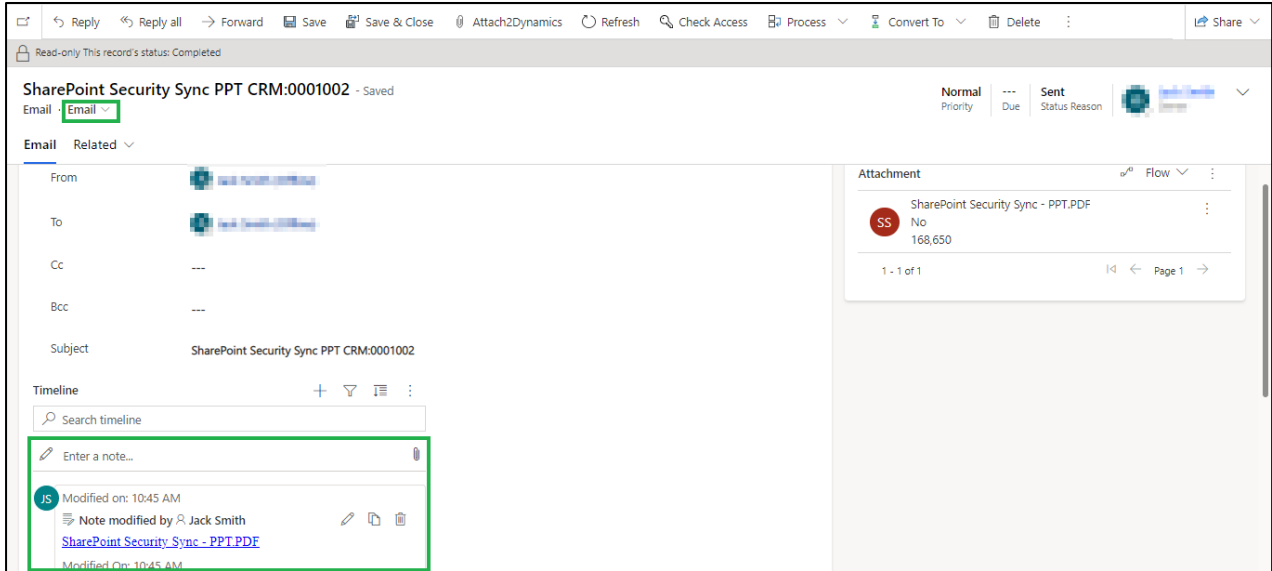
The screenshot shows a SharePoint library view for a 'Communication site'. The top navigation bar includes the site name, a search bar, and navigation links for 'Home', 'Documents', 'Pages', 'Site contents', and 'Edit'. Below the navigation bar are buttons for '+ New', 'Upload', 'Edit in grid view', 'Share', 'Copy link', 'Sync', and 'Download'. The main content area shows a file named 'Inogic partner program.PDF' with a timestamp of '29 minutes ago' and 'Modified By: Jack Smith'. The file name is highlighted with a green box.

b. Email Attachments:

If enabled, it'll move/copy the Email Attachments to a common folder called Email Attachments or Regarding folder and leave a hyperlink of the path in Note Body.

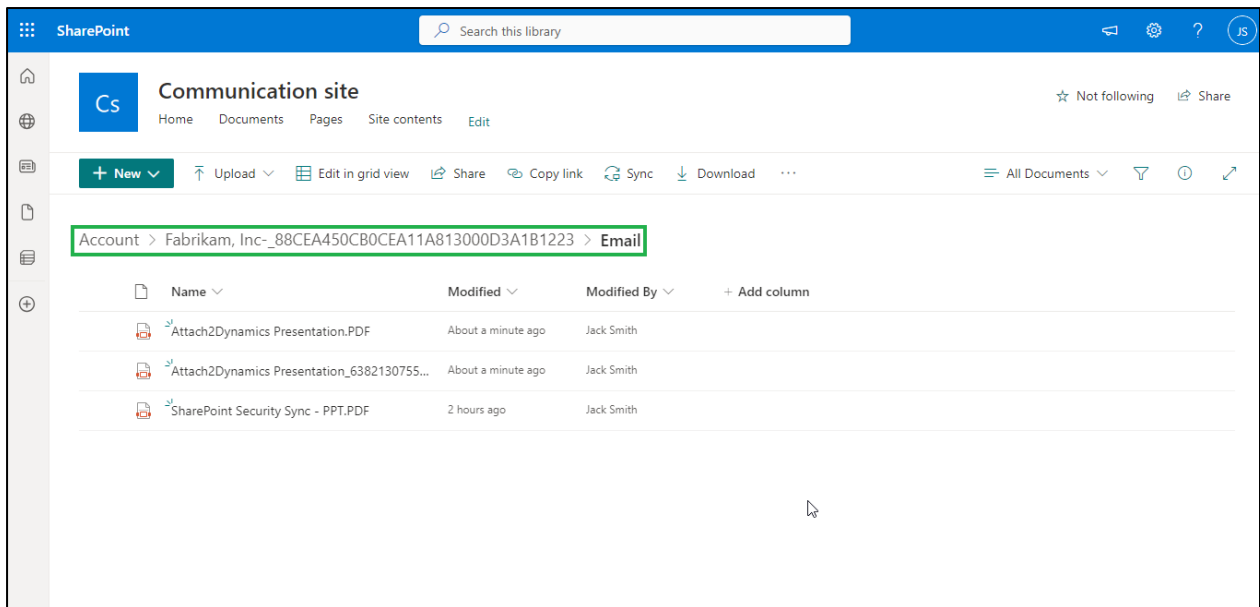
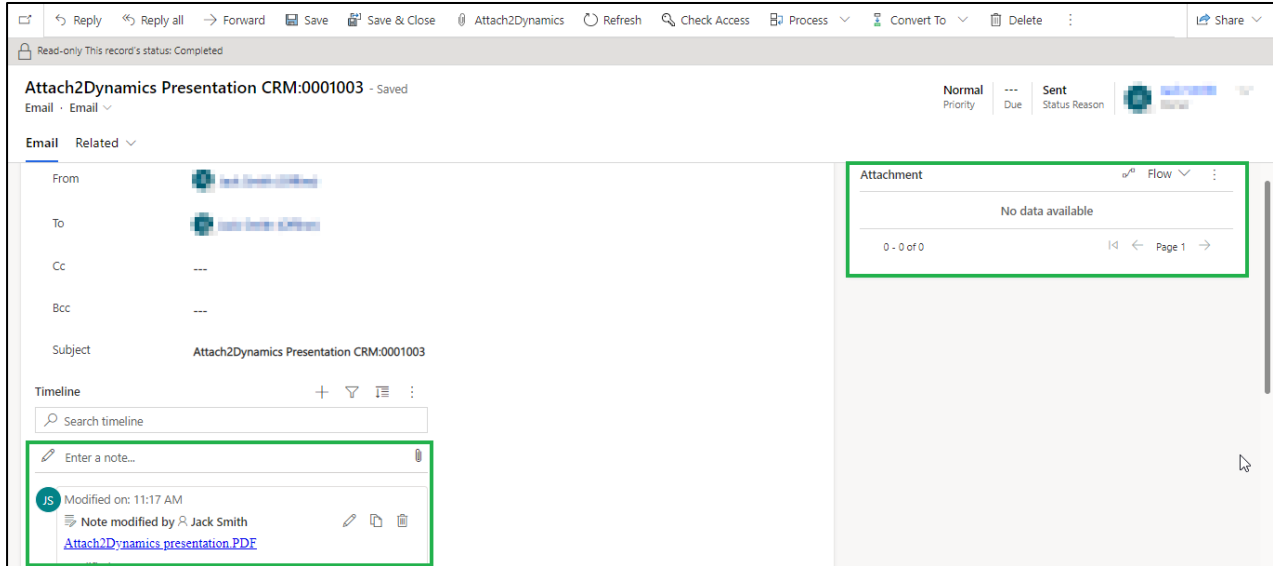
Copy:

SharePoint Security Sync – User Manual



Move:

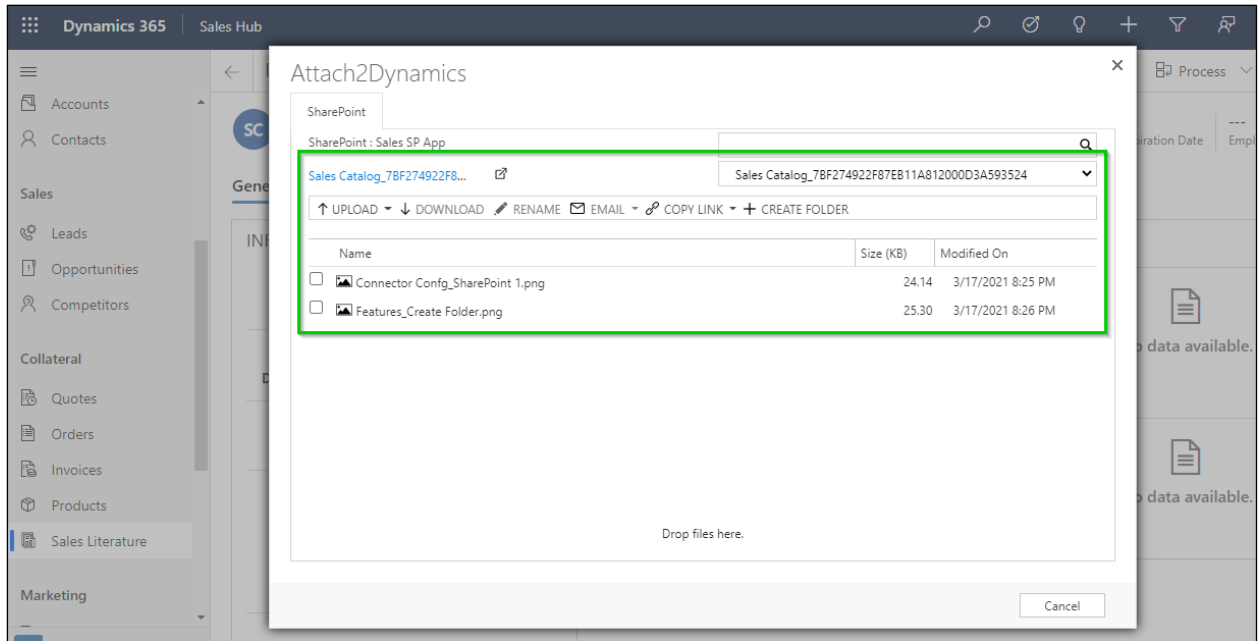
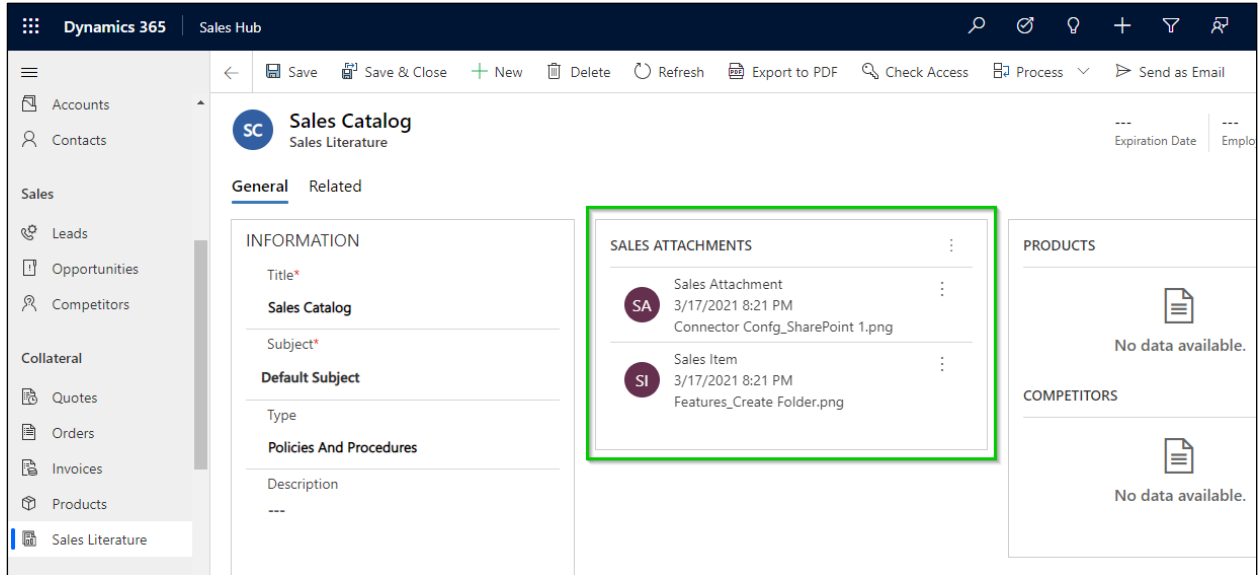
SharePoint Security Sync – User Manual



c. Sales Literature Attachments:

If enabled, it'll move/copy the Sales Literature Attachments to the respective Sales Literature folder and leave a hyperlink of the path back in Cloud Storage Links section.

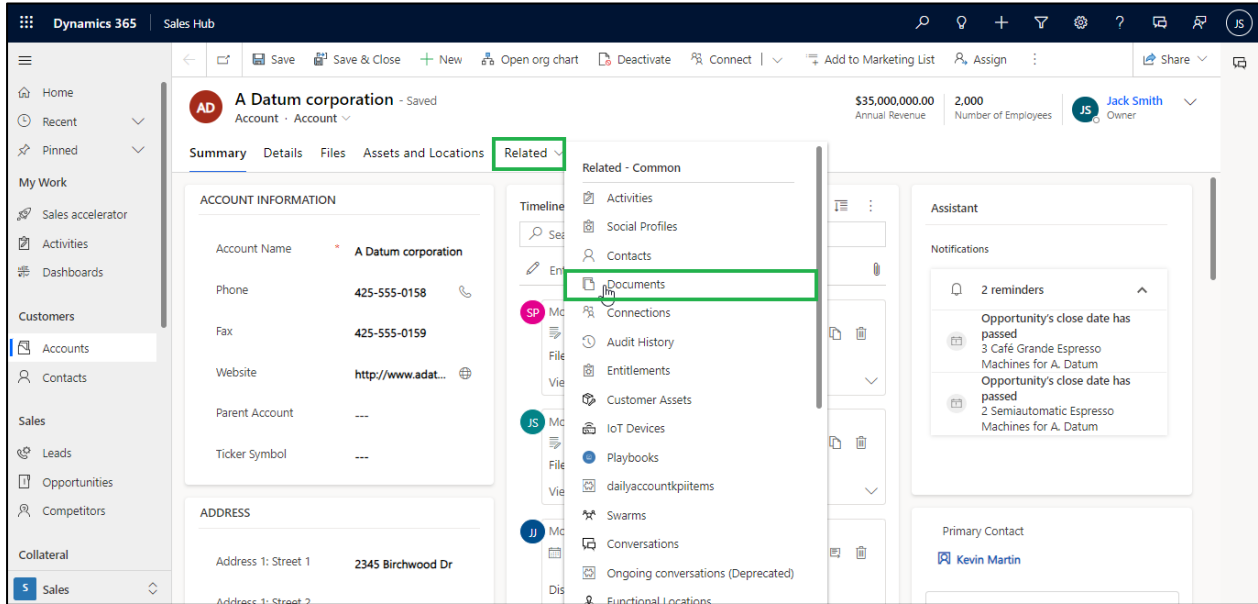
SharePoint Security Sync – User Manual



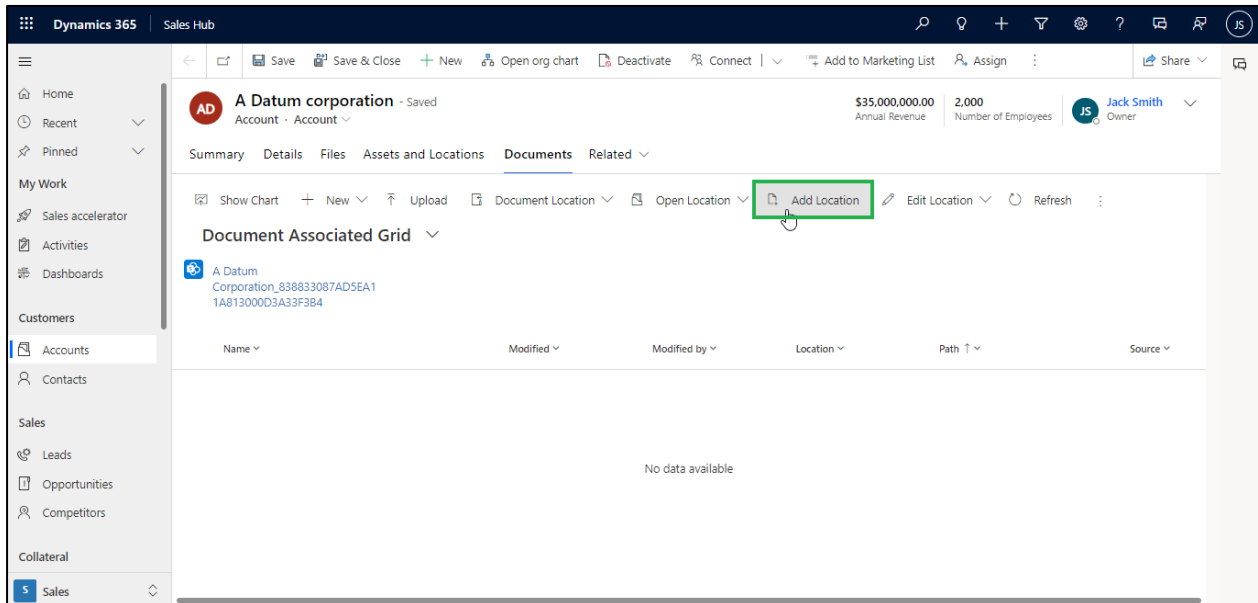
- j) **Document Location:** For a record, we can have multiple Document Locations within SharePoint Site. With the help of Attach2Dynamics UI, you can select which folder (Document Location) you want to upload the file in an easy to use UI.

SharePoint Security Sync – User Manual

- To add multiple document locations for a record in Attach2Dynamics UI, follow the steps given below:
- Go to a record, e.g., (Account) and navigate to **'Documents Tab'**.

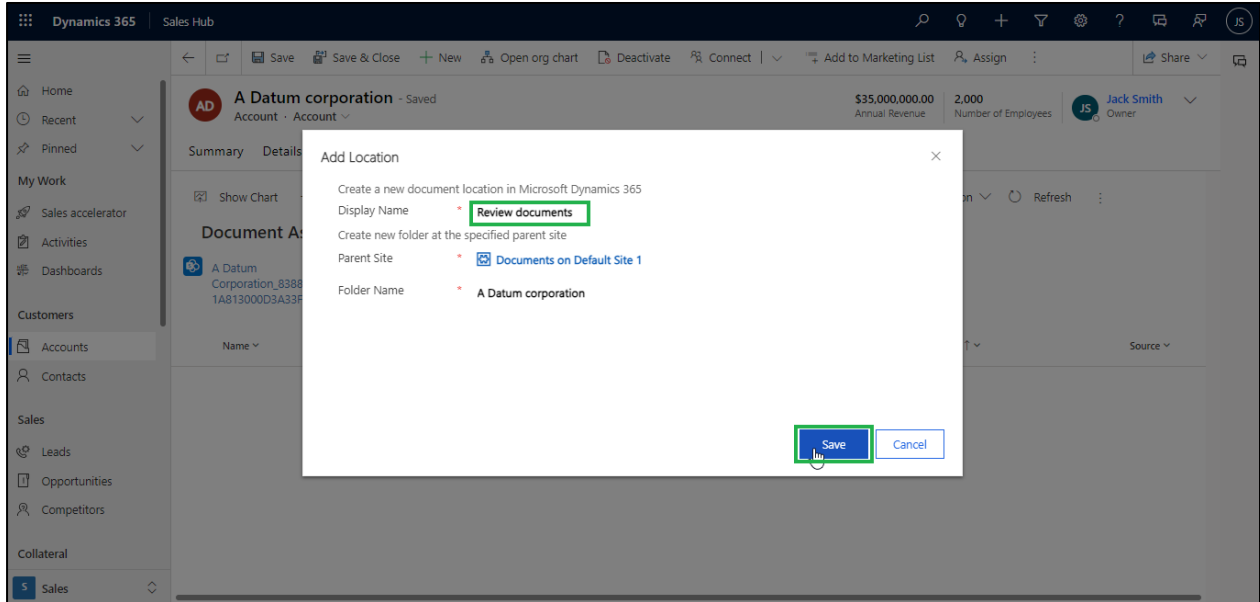


- Click on **'Add Location'**.

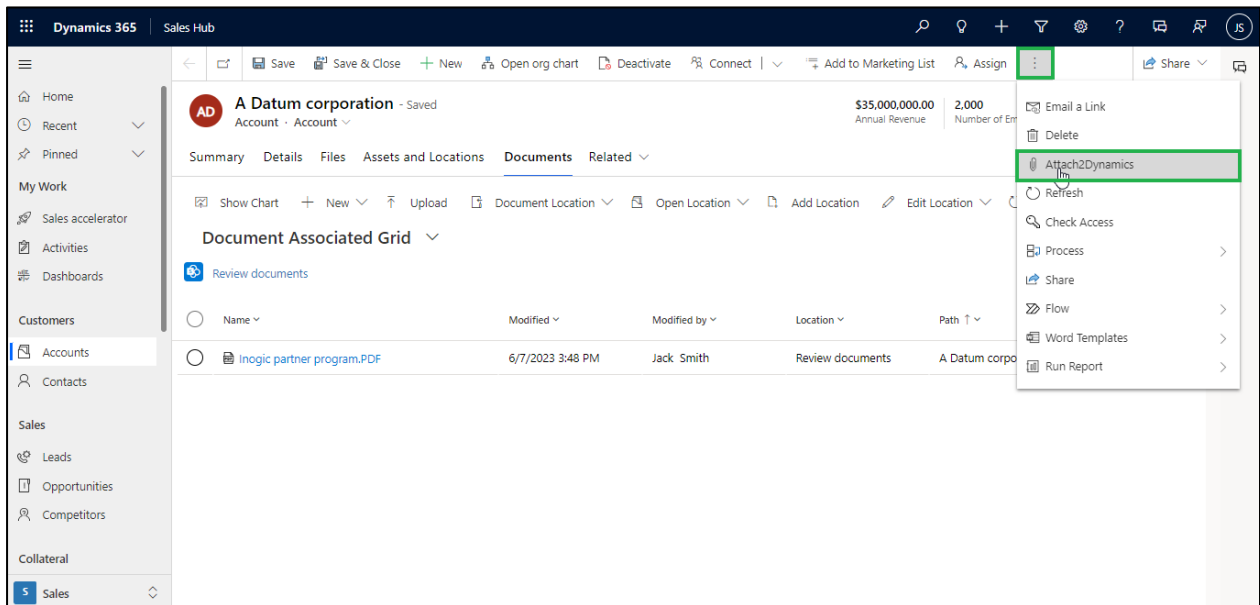


- Give this Document Location a **'Display Name'** e.g., (Review Documents) and Click **'Save'**.

SharePoint Security Sync – User Manual

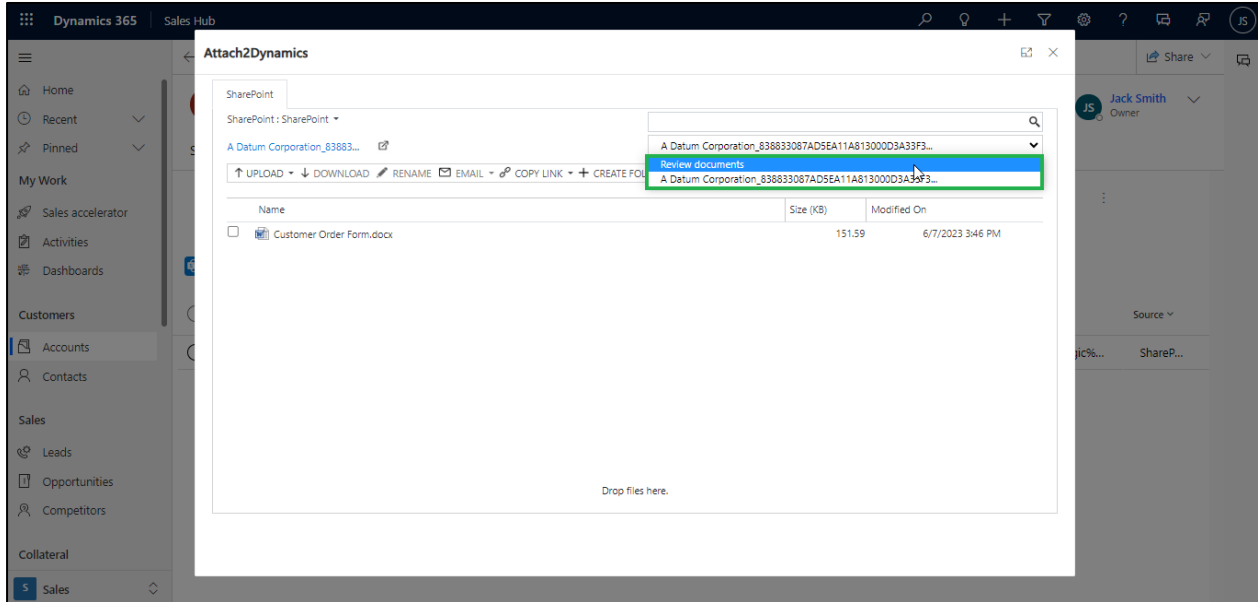


- Navigate to **Attach2Dynamics UI**.

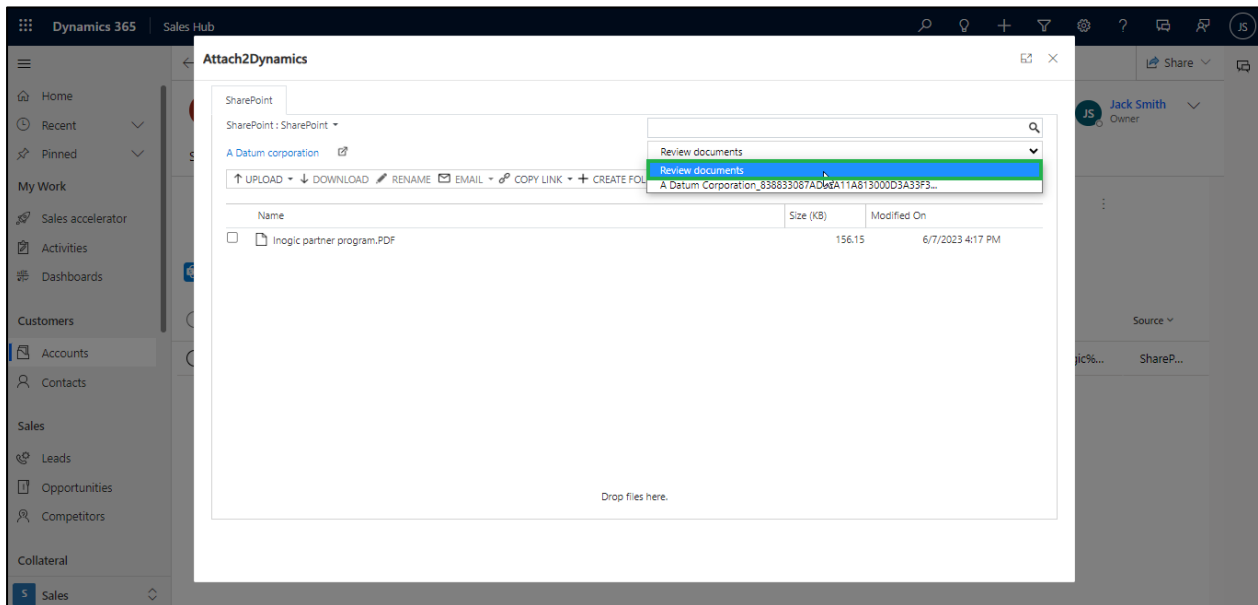


- Now you will have multiple document locations where you can upload files using Attach2Dynamics UI.

SharePoint Security Sync – User Manual

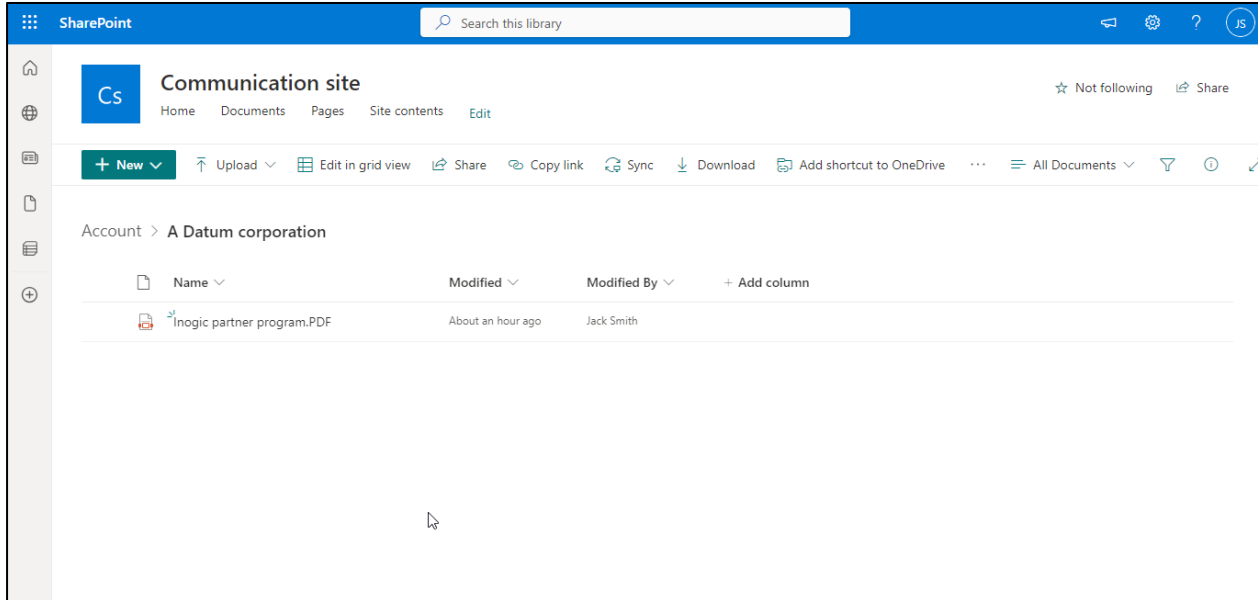


- Go to newly added Document location.

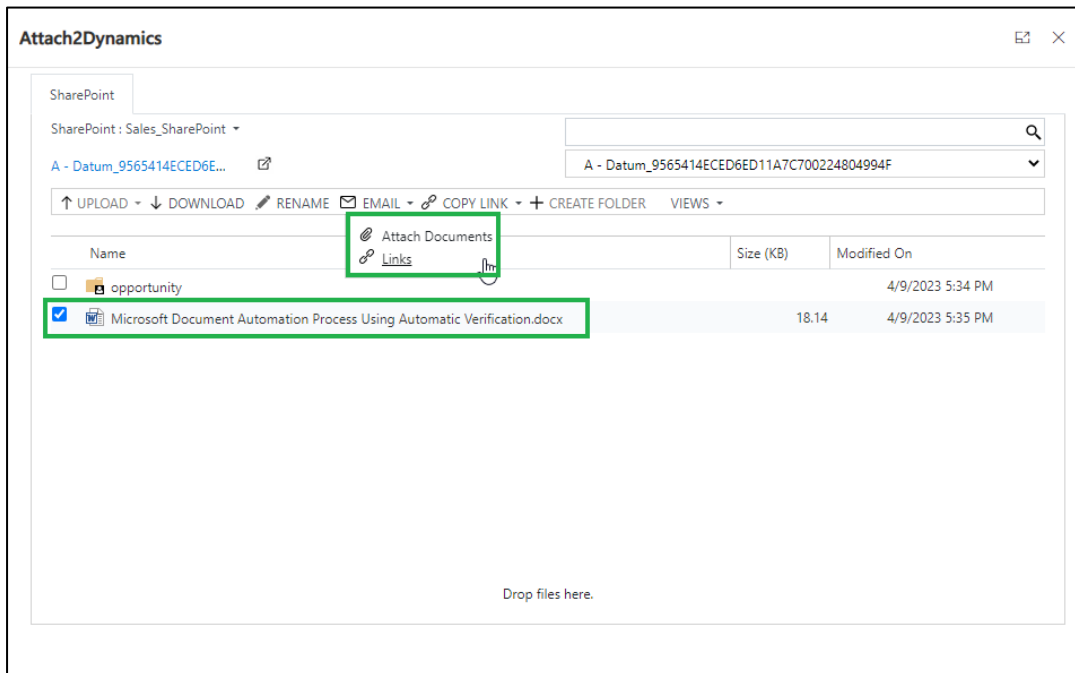


- By clicking on '**Open Folder**' icon, you can directly navigate to document location in the SharePoint site.

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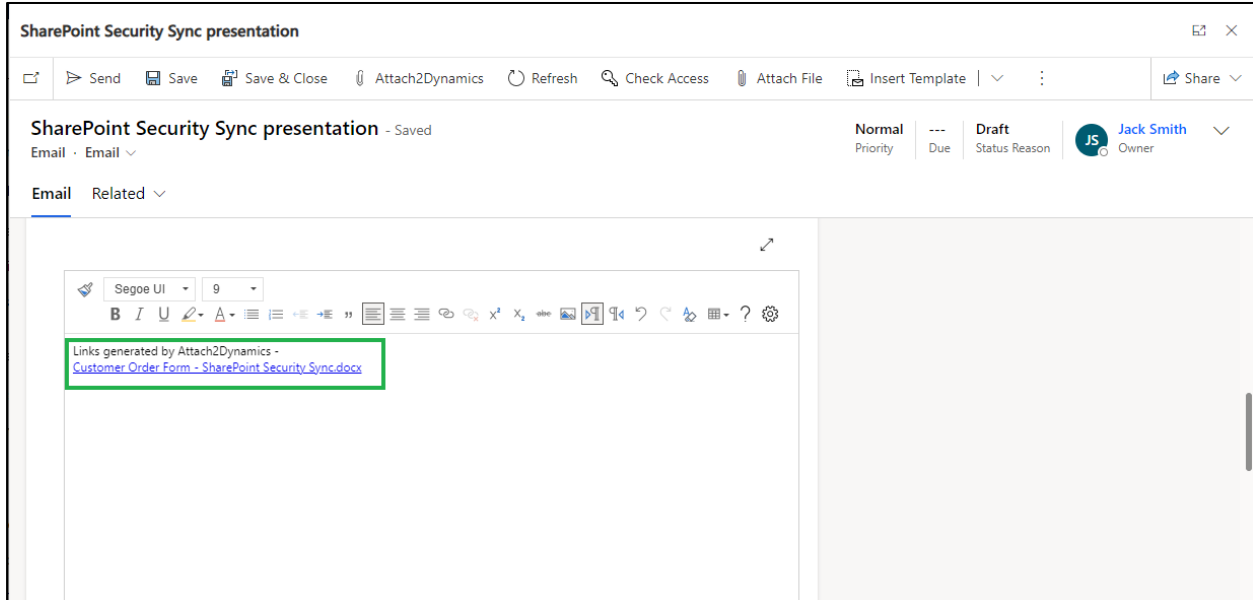


k) Email: Users also have an option to send an email. There are two options for this – send as **Link** or **Attachment**.



1) Links: On selecting this option you can insert the file's/folder's link in the email body. The below window opens on choosing the option 'Link' with link of file in email body.

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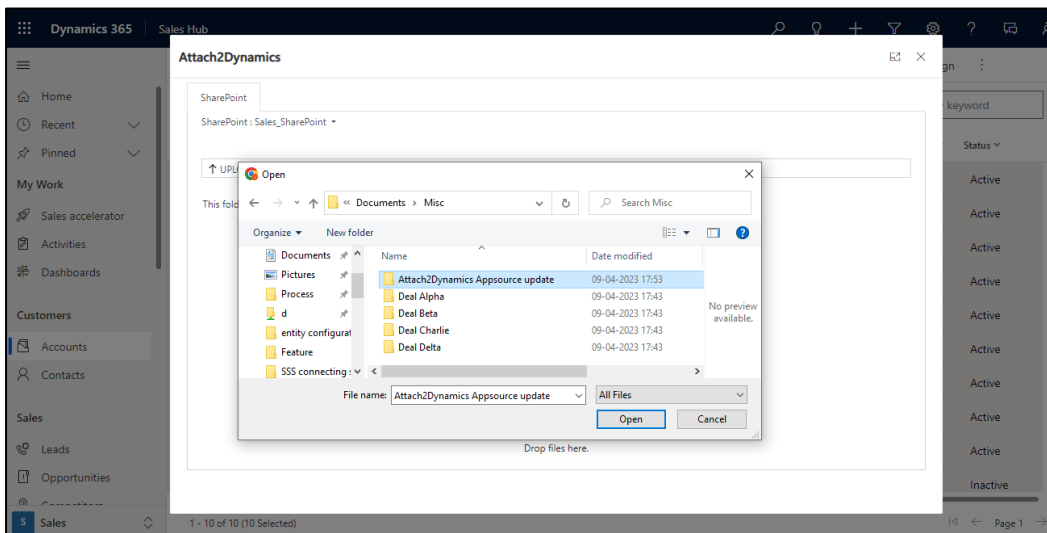
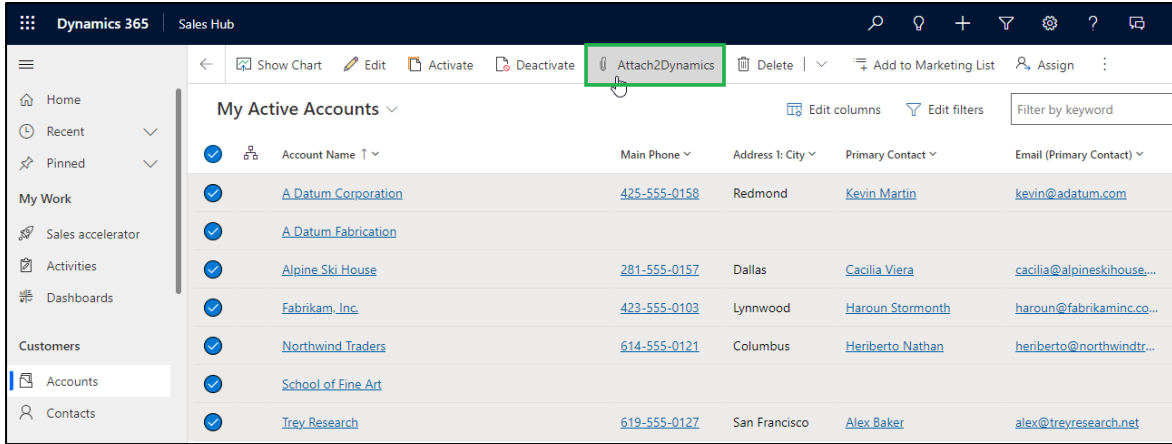
- 2) **Attach Documents:** On selecting this option you can attach the file itself in the email body. The below window opens with file as attachment by choosing 'Attach.'



Note: Email can be sent only with files and not folders. Also, multiple files can be sent in single mail.

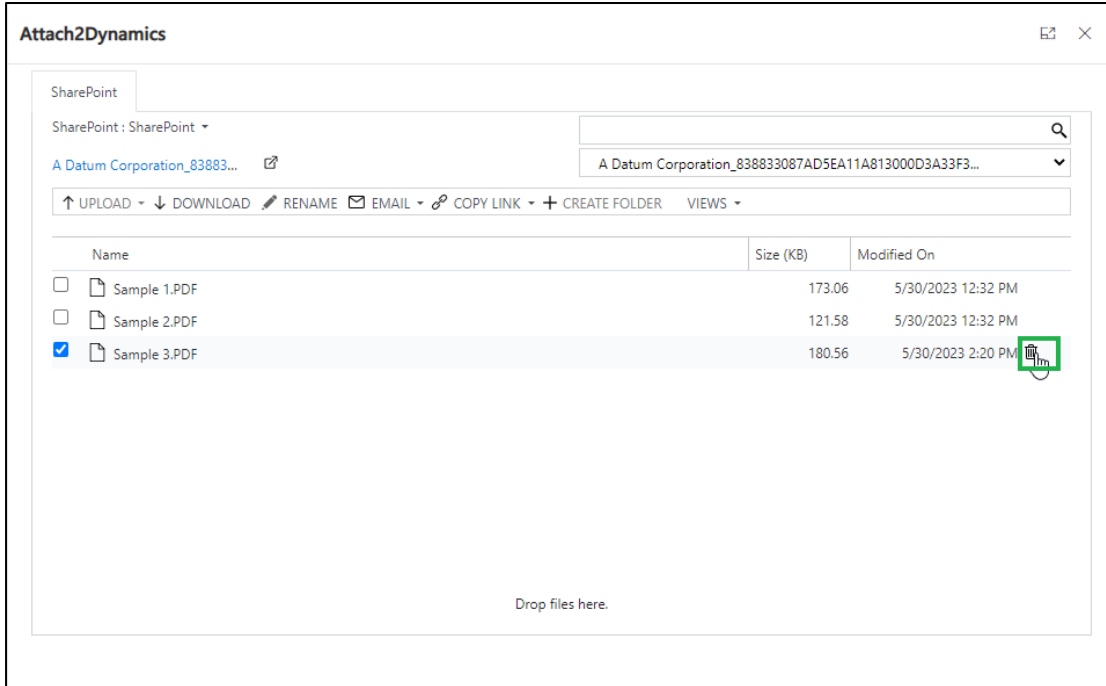
- 1) **Support for uploading files from Home Page:** Upload files from home page directly for the selected records.

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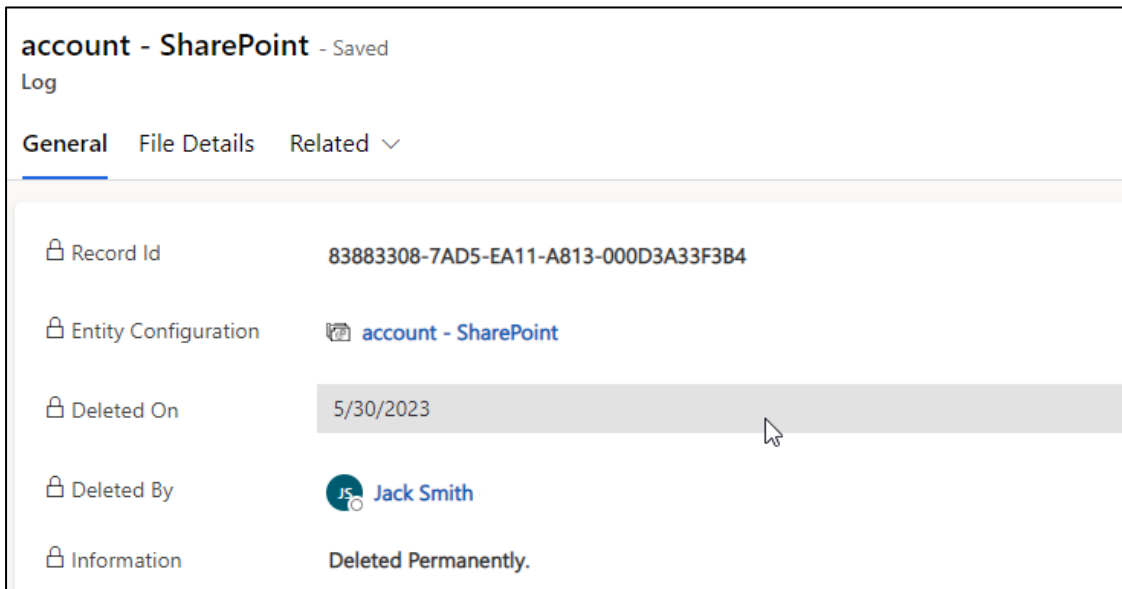


m) Delete: Users can delete files from Attach2Dynamics UI.

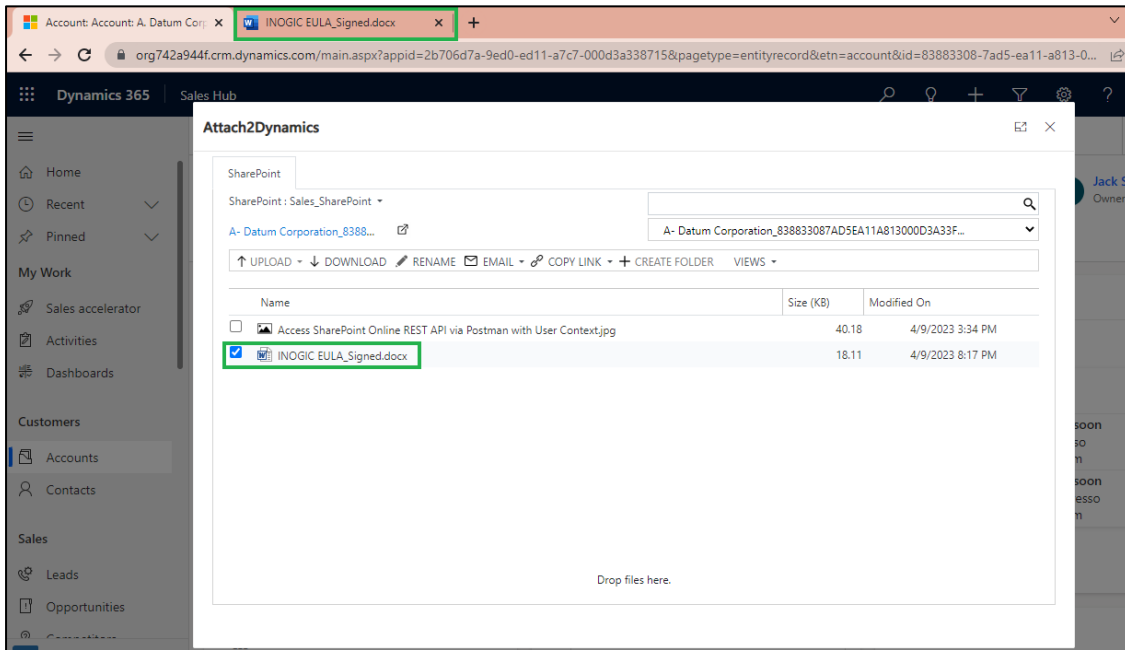
SharePoint Security Sync – User Manual



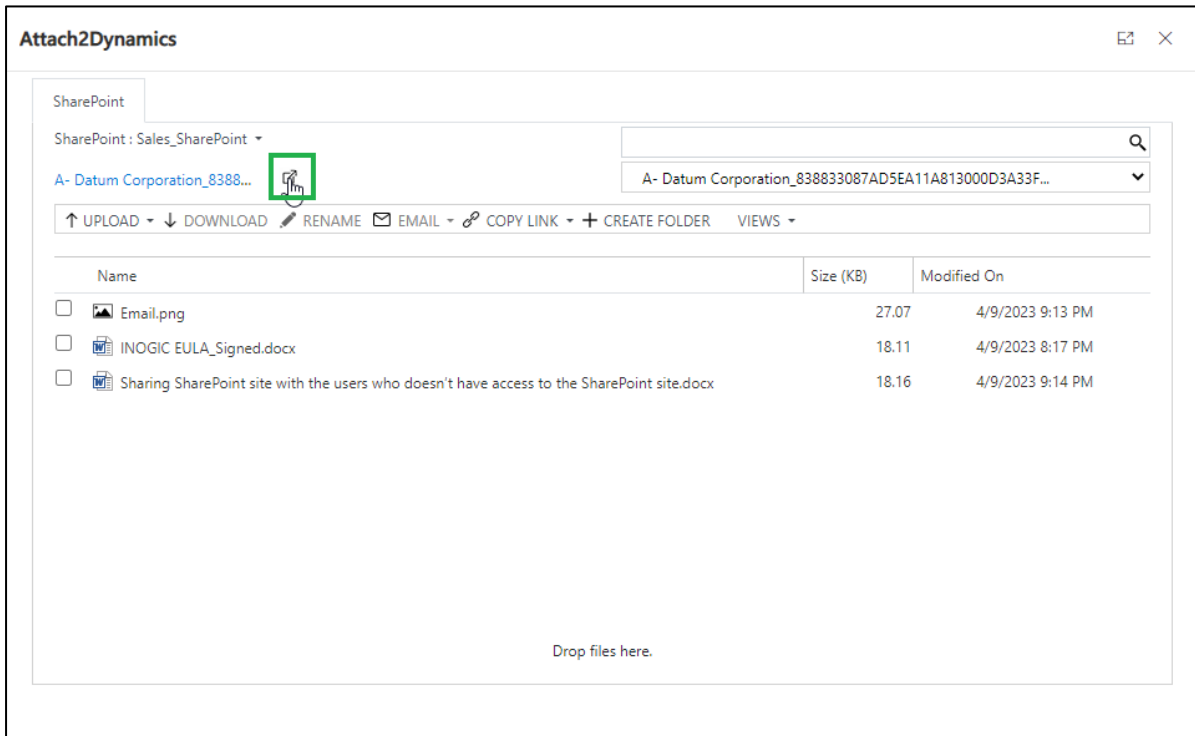
- Once a user deletes a file, an error log gets generated, as shown in below screenshot.



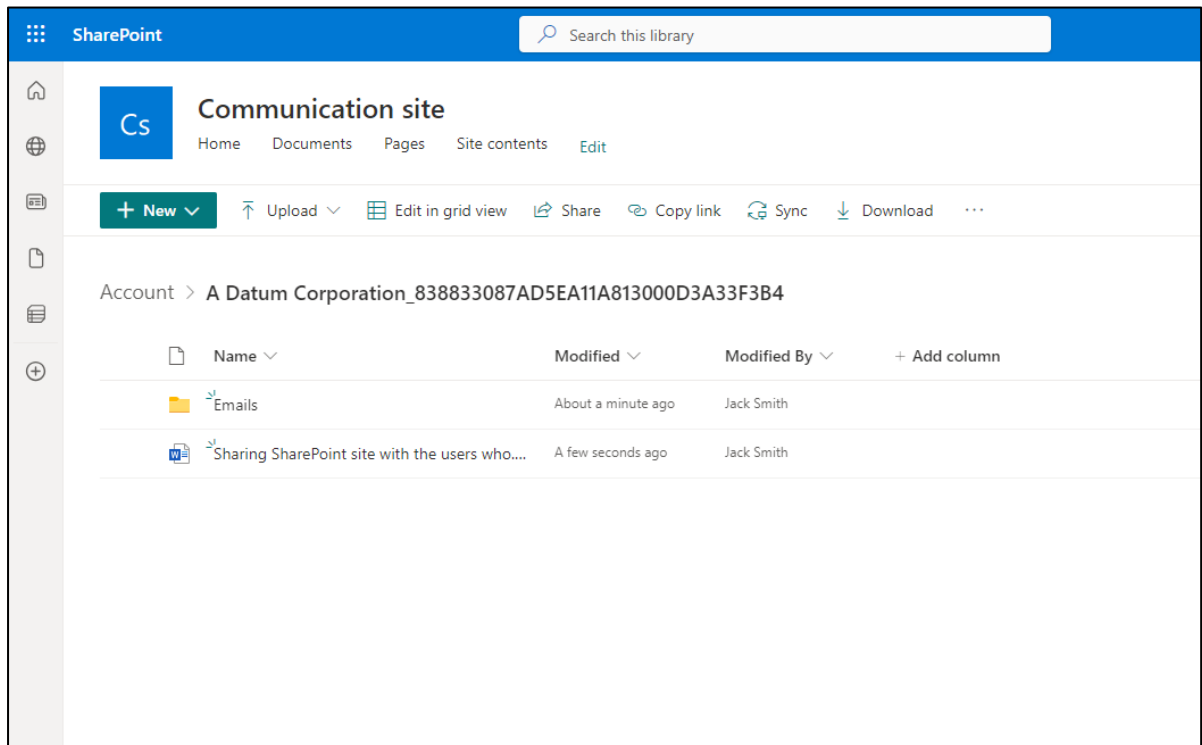
n) **View Files:** User can preview necessary files with a single click before downloading it.



o) **Open Folder:** User can open the record folder present on SharePoint site directly from Attach2Dynamics document management UI by clicking on the icon highlighted below:



After the clicking on the **Open Record** icon a new tab will be opened which will be redirected to the record folder.



Note: This feature is available only for SharePoint.

p) Create Custom Folder Structure

Users can now create a customized folder structure within SharePoint for storing and managing CRM documents/attachments. Users can customize the **Library Structure** and the **Record Folder Structure** within SharePoint as per their requirements.

Library Structure: Using this feature, users can customize the library structure in the following ways:

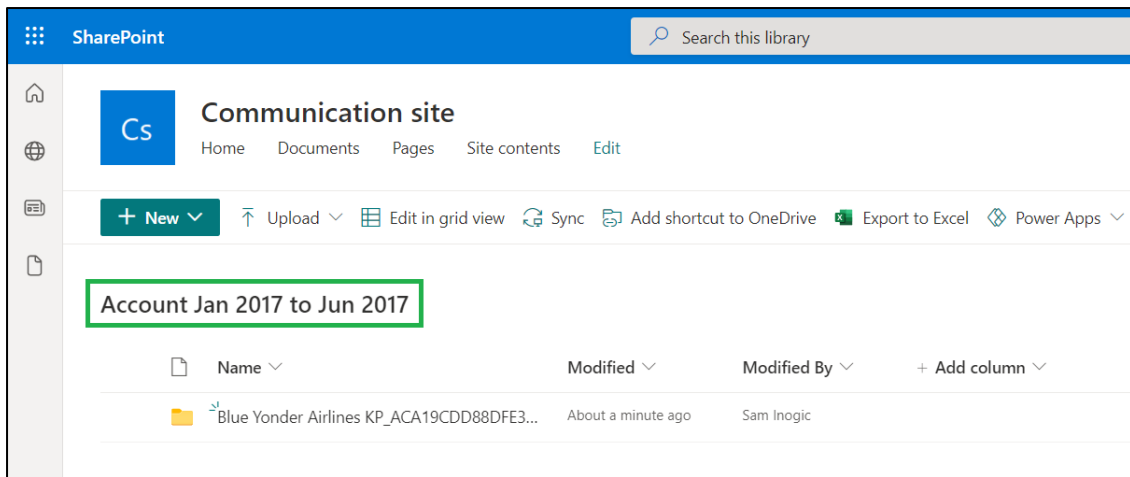
- i) **By Period:** Using this option user can create datewise, daywise, monthwise and yearwise document library structure within SharePoint. It comes handy for maintaining daily, monthly, quarterly sales or financial data in SharePoint. In the below screenshot, configuration of custom folder structure by period for Account entity is shown:

account - Sp_Sharepoint - Saved
Entity Configuration

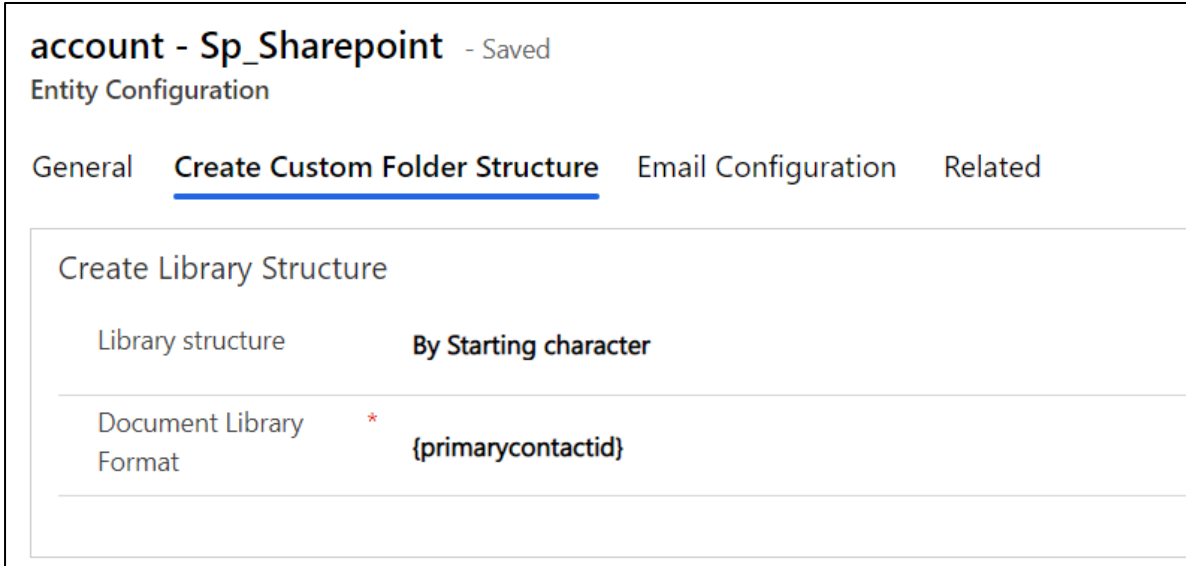
General Create Custom Folder Structure Email Configuration Related

Create Library Structure

Library structure	By Period
Period type *	X Month
Duration *	6
Select date Format *	MMM yyyy



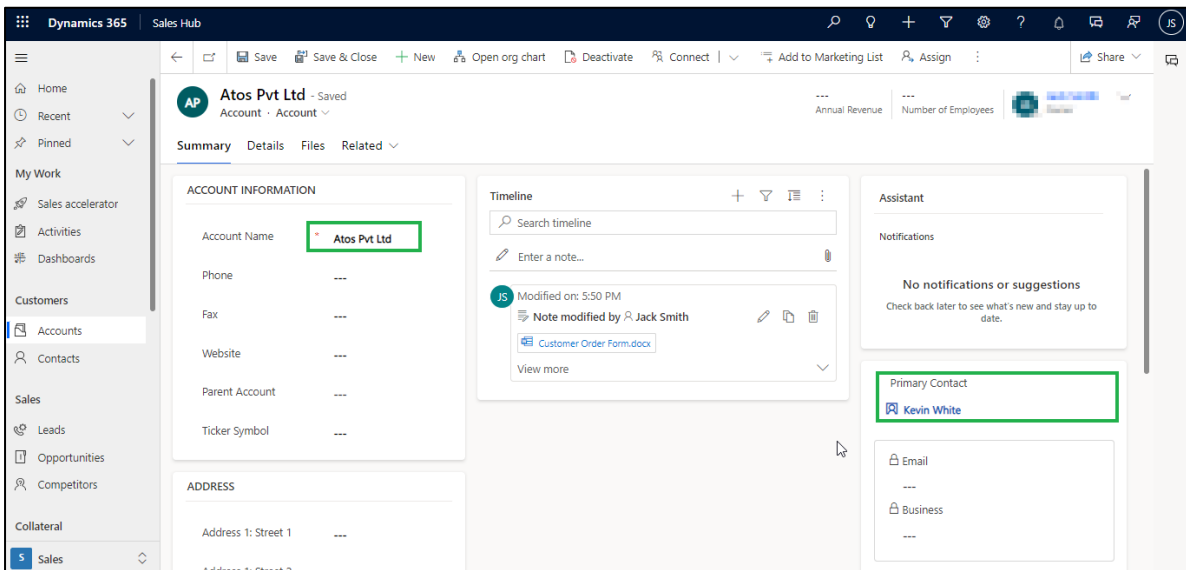
- ii) **By Starting Character:** Using this option user can create document library structure based on the starting character of any chosen field. This comes handy for segregating folders alphabetically. In the below screenshot, configuration of custom folder structure by starting character for Account entity is shown:



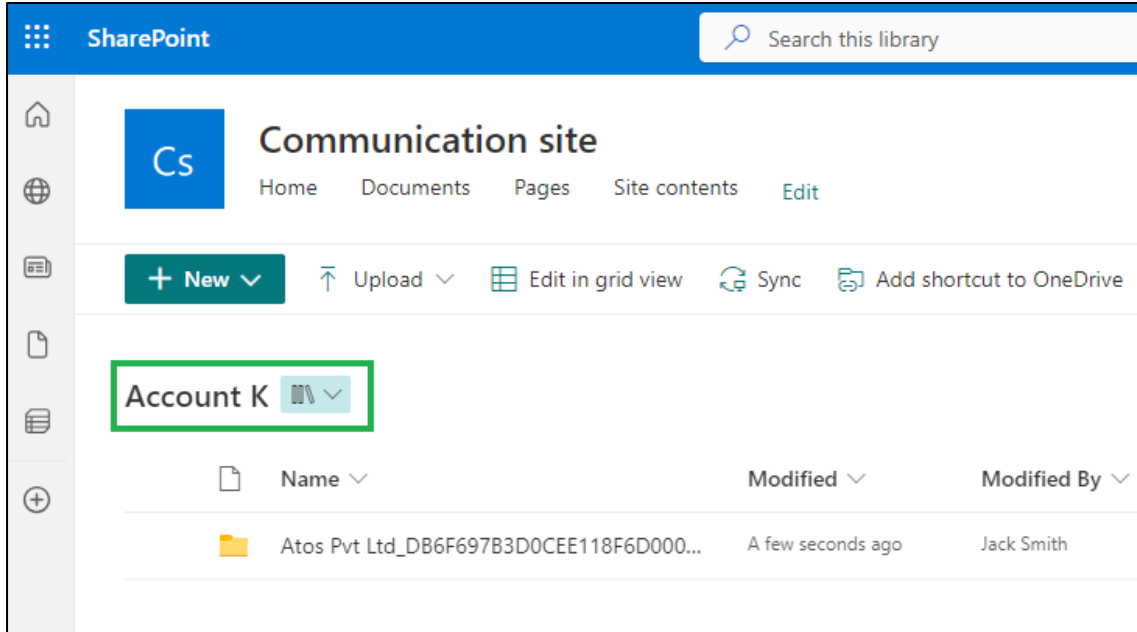
Once configuration for creating library structures based on starting character is completed, users will be able to segregate folders alphabetically.

For Example:

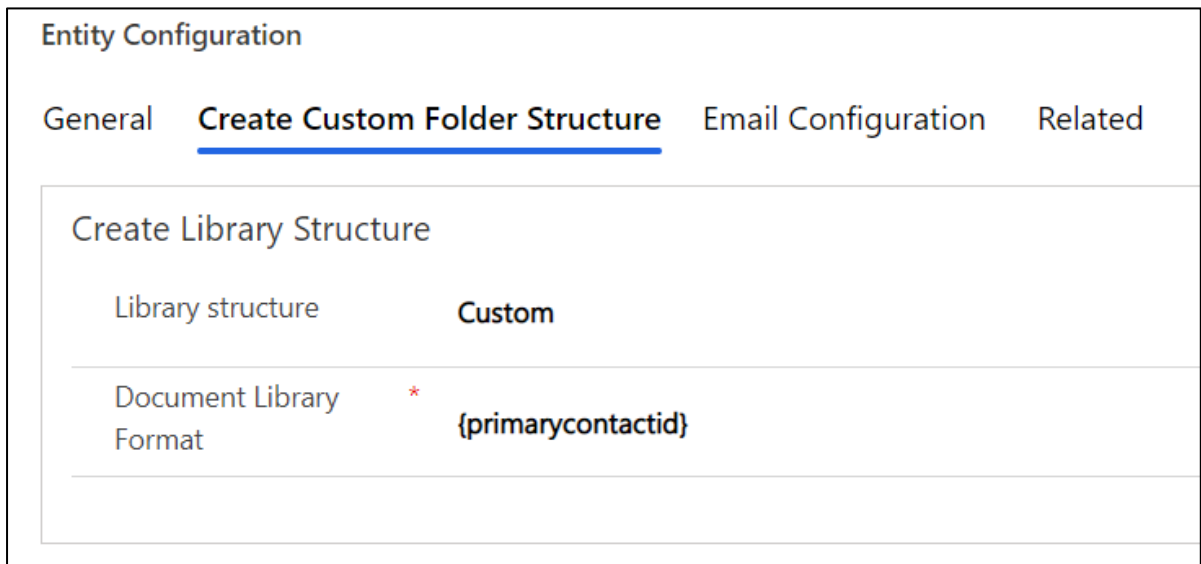
A user creates an Account with Primary Contact name starting from alphabet 'K'.



Then a SharePoint Library for Account's with Primary contact names starting from alphabet 'K' will be created in SharePoint.



iii) **Custom:** Using this option users can create document library structure based on any field name. This comes handy for segregating folders on the basis of primary contacts, contact method, address, etc. In the below screenshot, configuration of custom folder structure by a particular field type for Account entity is shown:

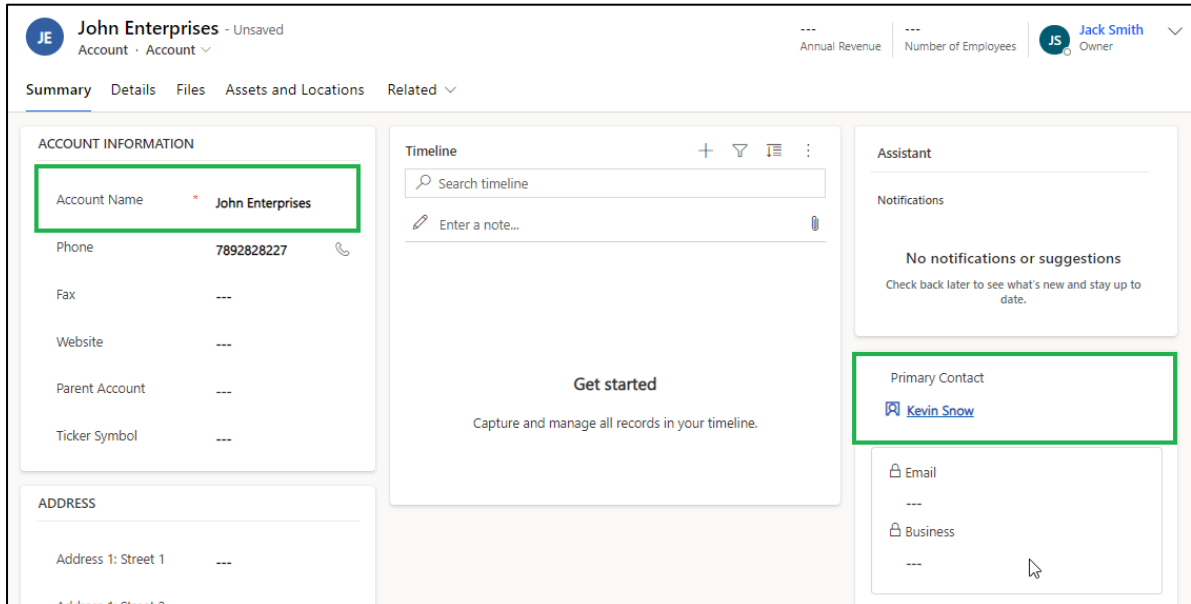


Once configuration for creating a document library structure based on custom values in the primary contact fields is completed, users can segregate folders on the basis of primary contacts.

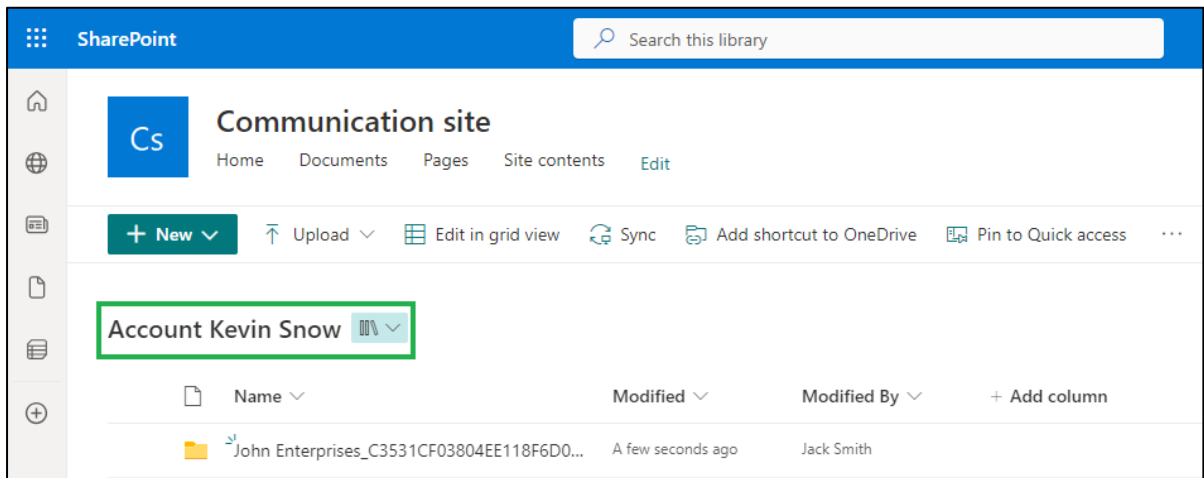
For example:

A user creates an account with primary contact name as ‘Kevin Snow’.

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Then a SharePoint Library for Accounts with Kevin Snow as primary contact will be created in SharePoint.



Record Folder Structure: With this feature, users can customize the record folder structure in SharePoint by using **logical name**, **text** or a **combination of both logical name and text**.

account - Sp_Sharepoint - Saved
Entity Configuration

General Create Custom Folder Structure Email Configuration Related

Create Library Structure

Library structure **By Period**

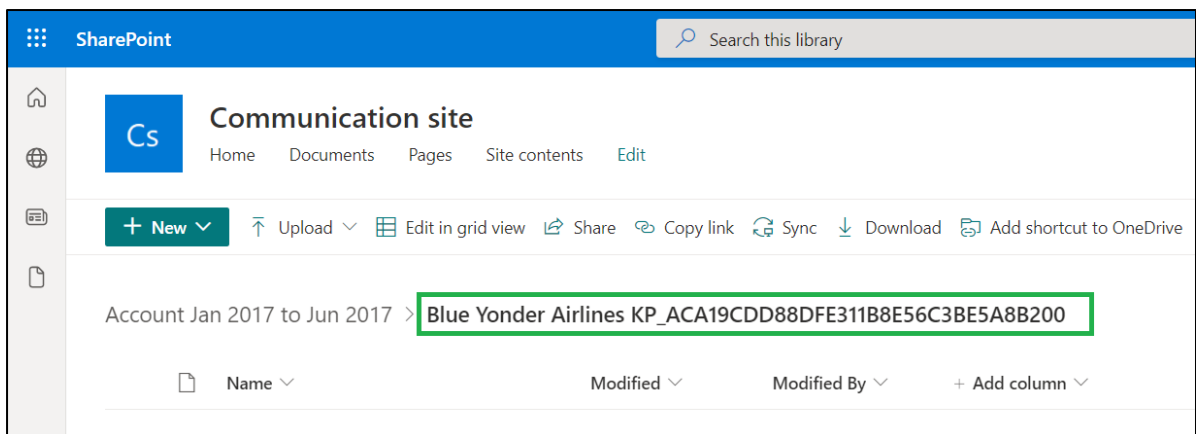
Period type * **X Month**

Duration * **6**

Select date Format *

Create Record Folder Structure

Folder Format **{name} KP**




q) Auto Create Folder

This feature allows users to create folder structure in the respective SharePoint Site with the help of workflow. The ‘**Auto Create Folder**’ field on the entity configuration form serves this purpose.

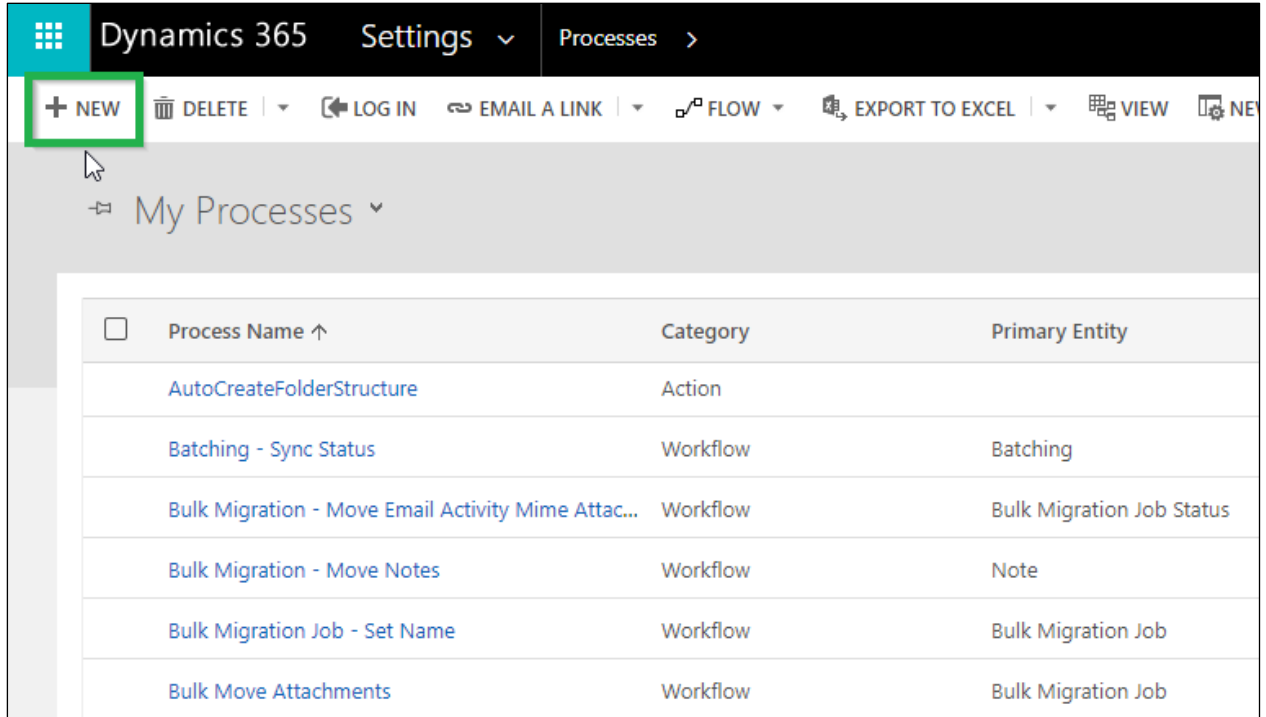
account - SharePoint - Saved
Entity Configuration

General Create Custom Folder Structure Email Configuration

Connector	*	 SharePoint
Entity Name	*	Account
Attachment Action		Copy
Override Files		<input type="checkbox"/>
Auto Create Folder		No

By default the field is set to 'No'. The user has to select 'Yes' from the dropdown of Auto Create Folder to create folder structure in SharePoint Site. To create the folder automatically, the user has to first create a workflow or can use Power Automate as well and call the **AutoCreateFolderStructure** action. Follow the steps given below to create a workflow.

- Navigate to **Advance settings** --> **Processes** --> Select **'+New'**.



Give an appropriate name to the workflow --> For **'Category'** select **'Workflow'** --> Choose the entity for which you want to create folders automatically --> Click on **Ok**.

Create Process

Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: *

Category: * Entity: *

Run this workflow in the background (recommended)

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Type: New blank process
 New process from an existing template (select from list):

Template Name ↑	Primary Entity	Owner
[Empty table body]		

As per business requirement this workflow can be run for different events.

Entity

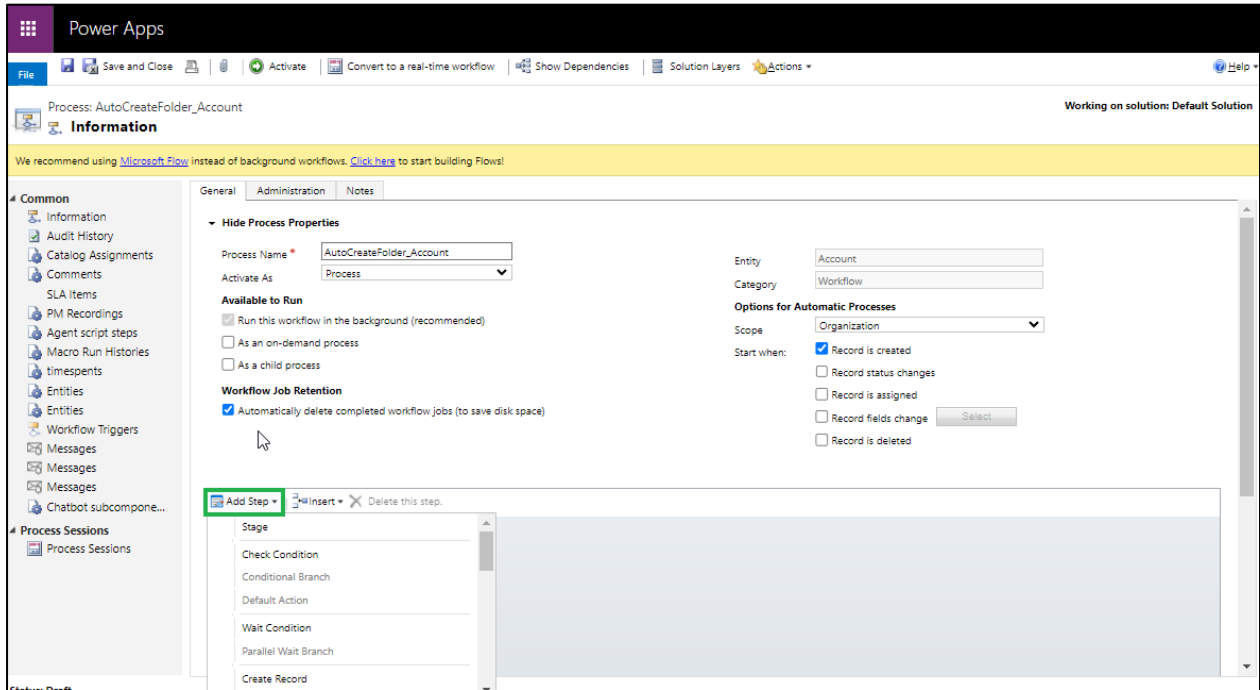
Category

Options for Automatic Processes

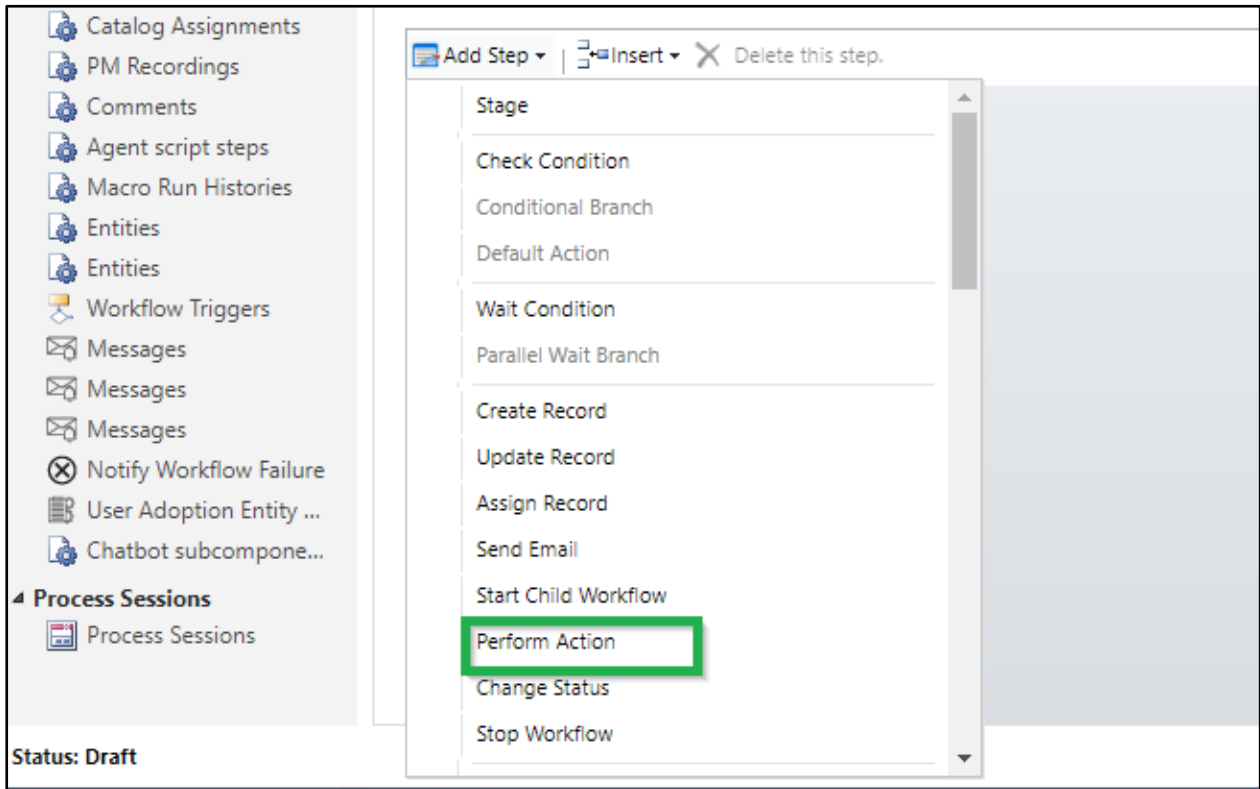
Scope

Start when: Record is created
 Record status changes
 Record is assigned
 Record fields change
 Record is deleted

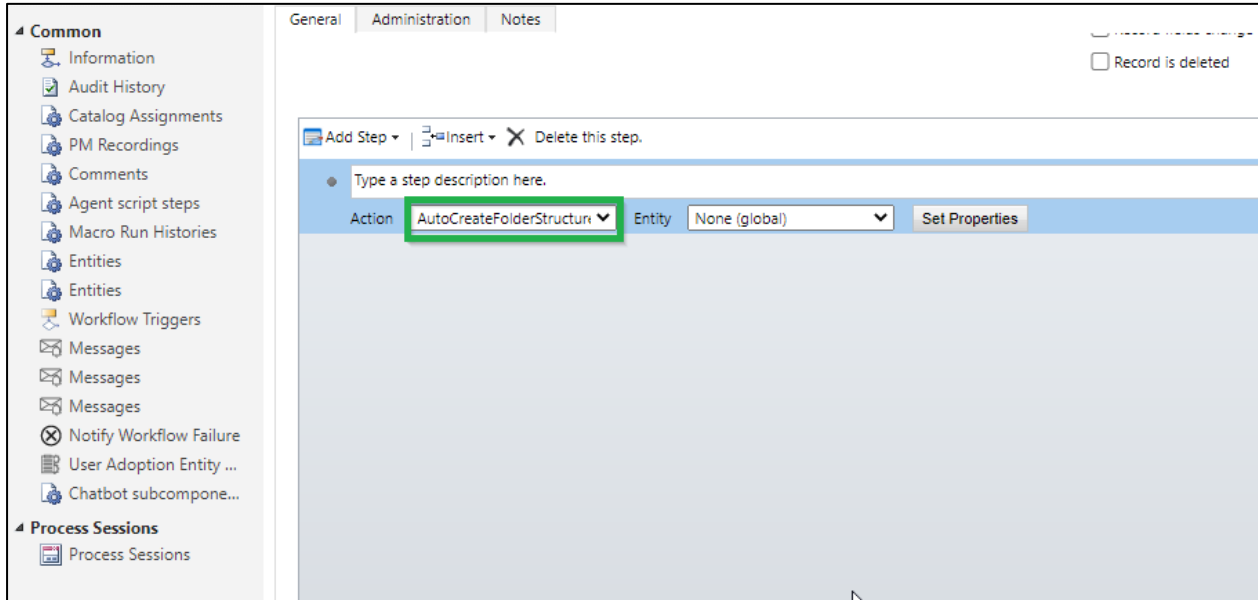
Click on 'Add Step'.



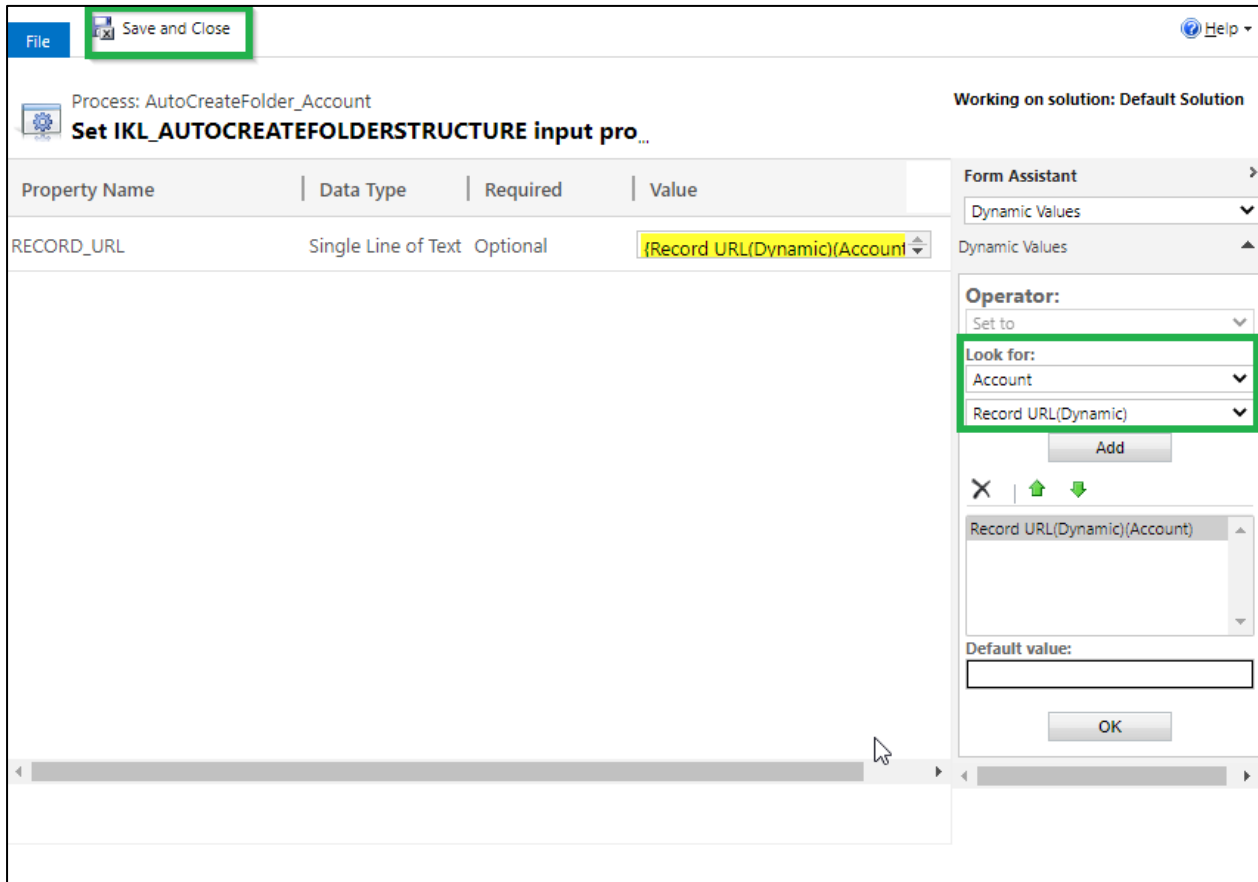
Next, select **Perform Action** step.



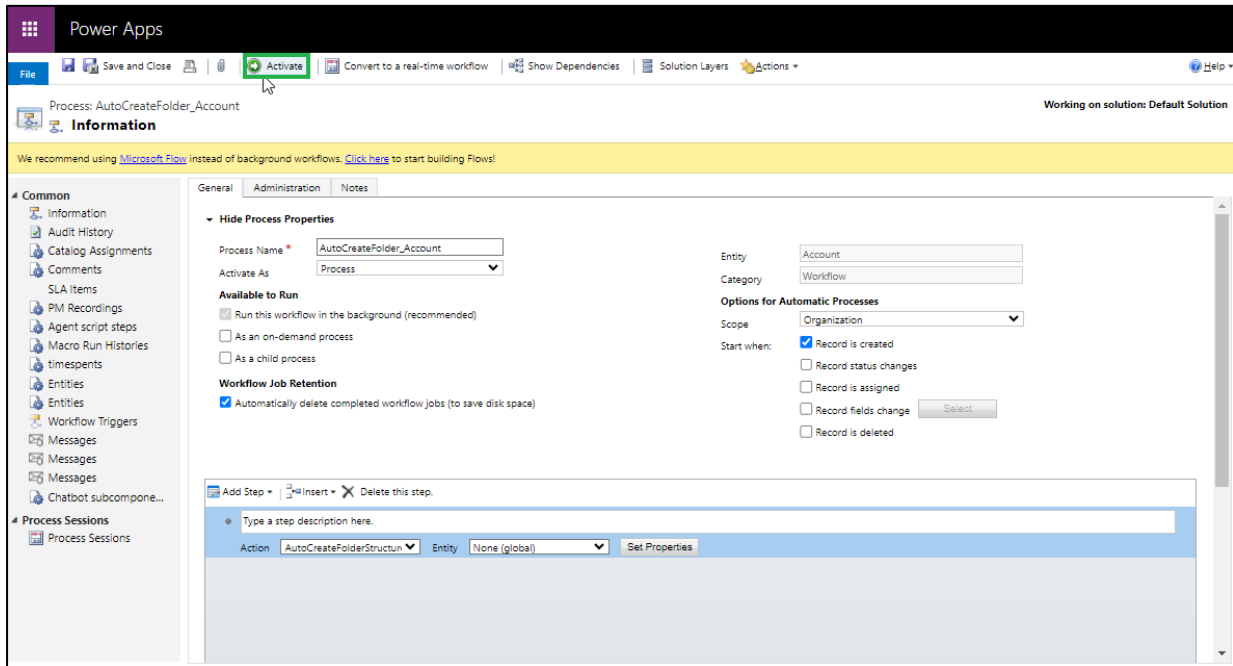
Then from the dropdown select the **AutoCreateFolderStructure** action as shown below:



Click on **Set Properties** --> Select **Account** and **Record URL(dynamic)** in the **'Look for'** section --> Click on **Save and Close**.



Activate the workflow.



Once the workflow is activated, based on the triggering event the record would be created in SharePoint. By Auto Create folder feature user will be able to create folder in the SharePoint without hitting the **Attach2Dynamics** button or **Documents/Files** tab.

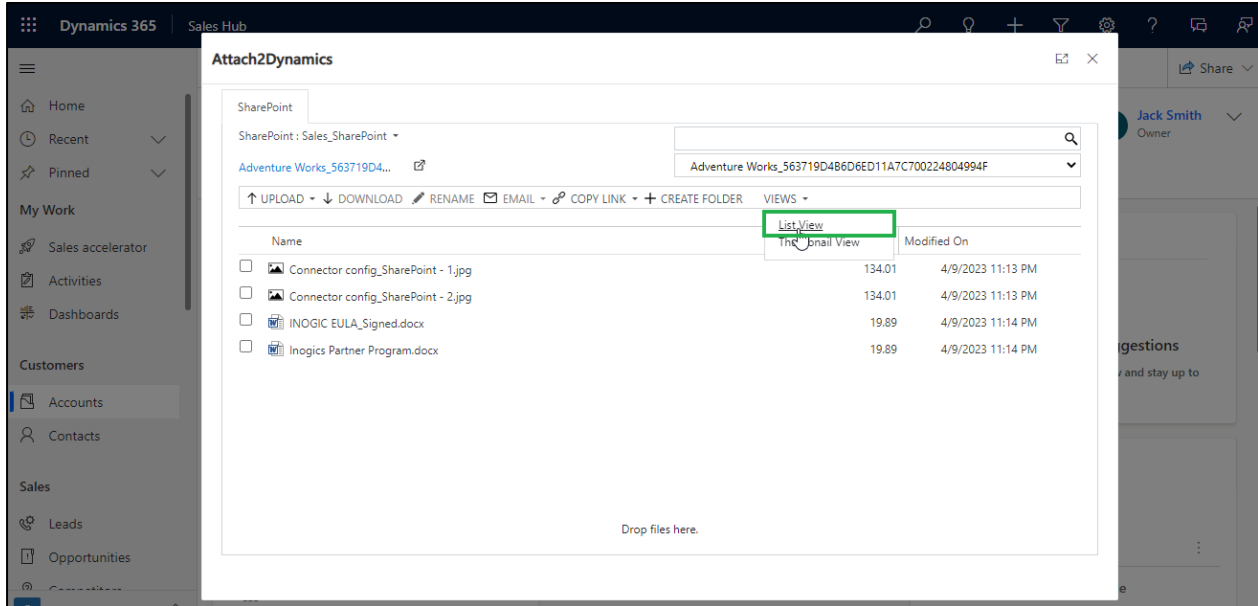
r) **Thumbnail View and List View**

Users can now view folders/files stored on Sharepoint in List View as well as Thumbnail view with Attach2Dynamics UI in Dynamics 365 CRM.

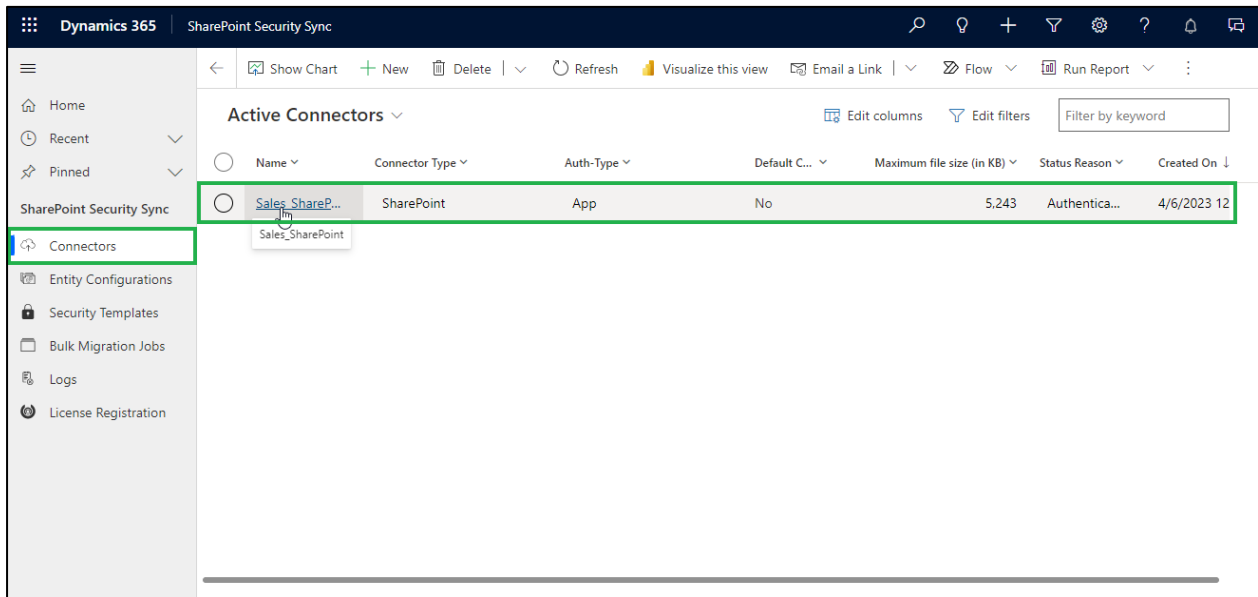
Views: Using this feature, users can change the views in the following ways:

- i. **List View:** Using this option, users can view files/folders in List View.

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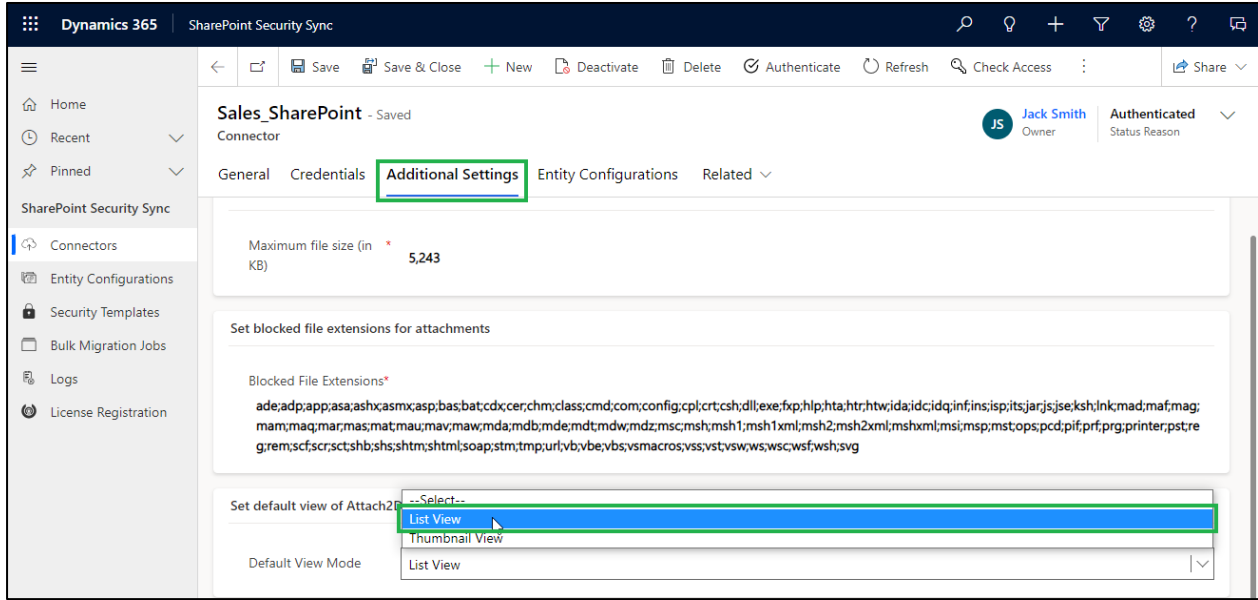


- To set List View as your default view, follow the steps given below:
- Navigate to **SharePoint Security Sync App --> Connectors** and **Click** on required **Connector Record**.

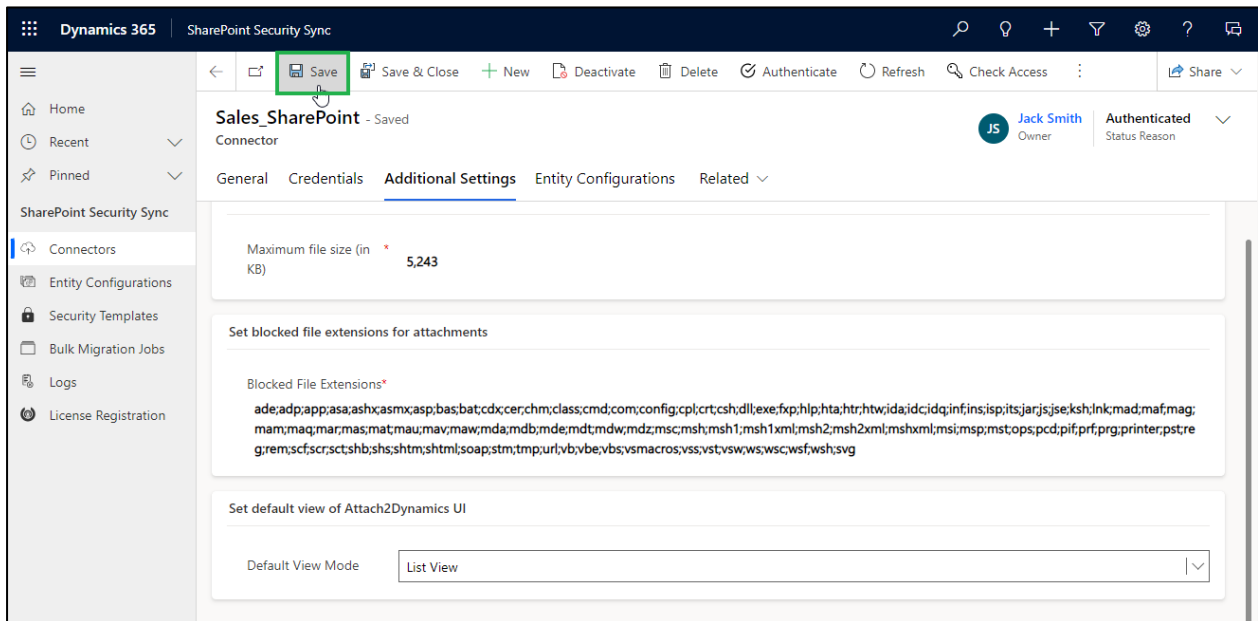


- Go to **Additional Settings** and **Select** default view of your '**Attach2Dynamics UI**' as '**List View**'.

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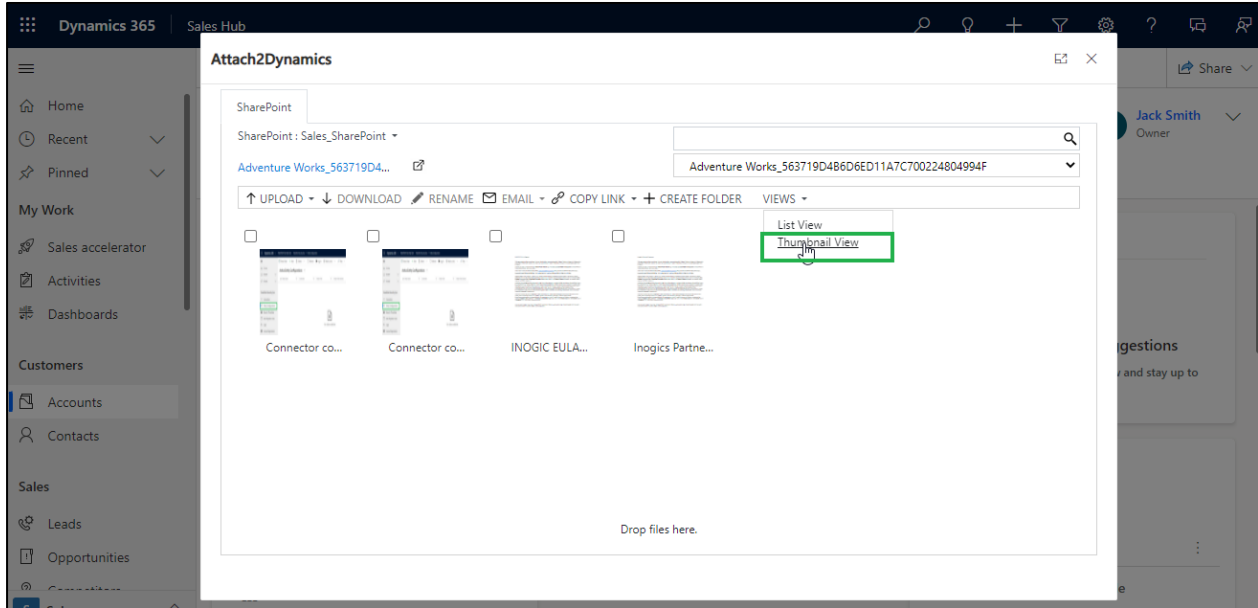


- Click on 'Save'.

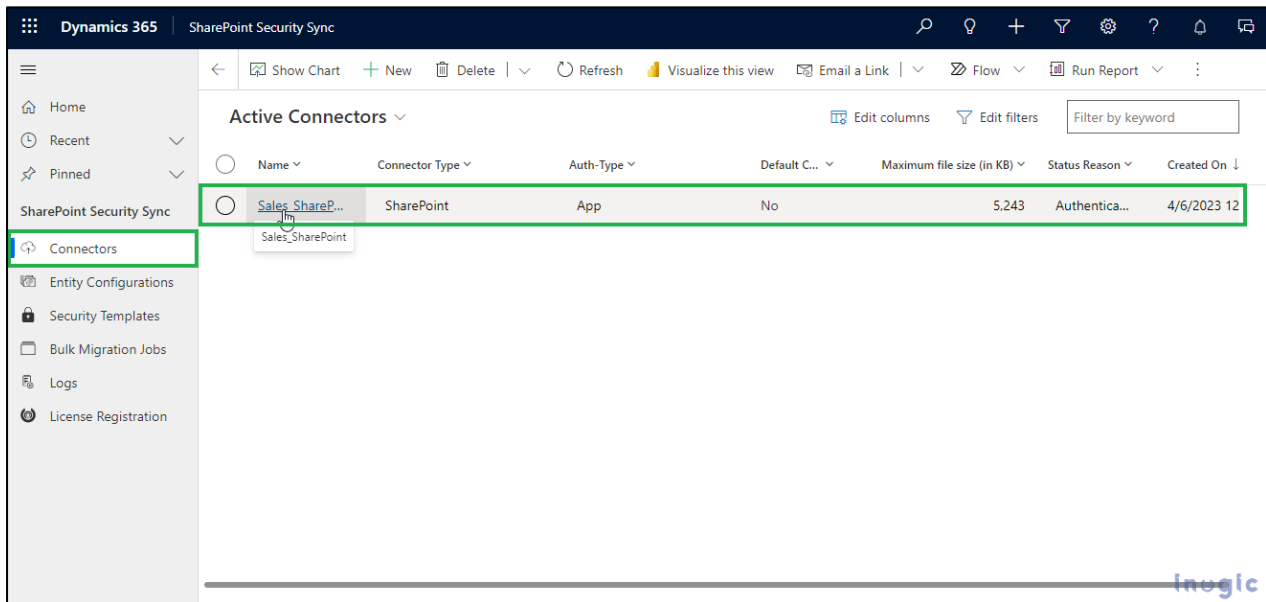


- Thumbnail View:** Using this option, users can view files/folders in Thumbnail View, making it easy and quick for users to skim through various documents and find their desired files without a hassle.

SharePoint Security Sync – User Manual

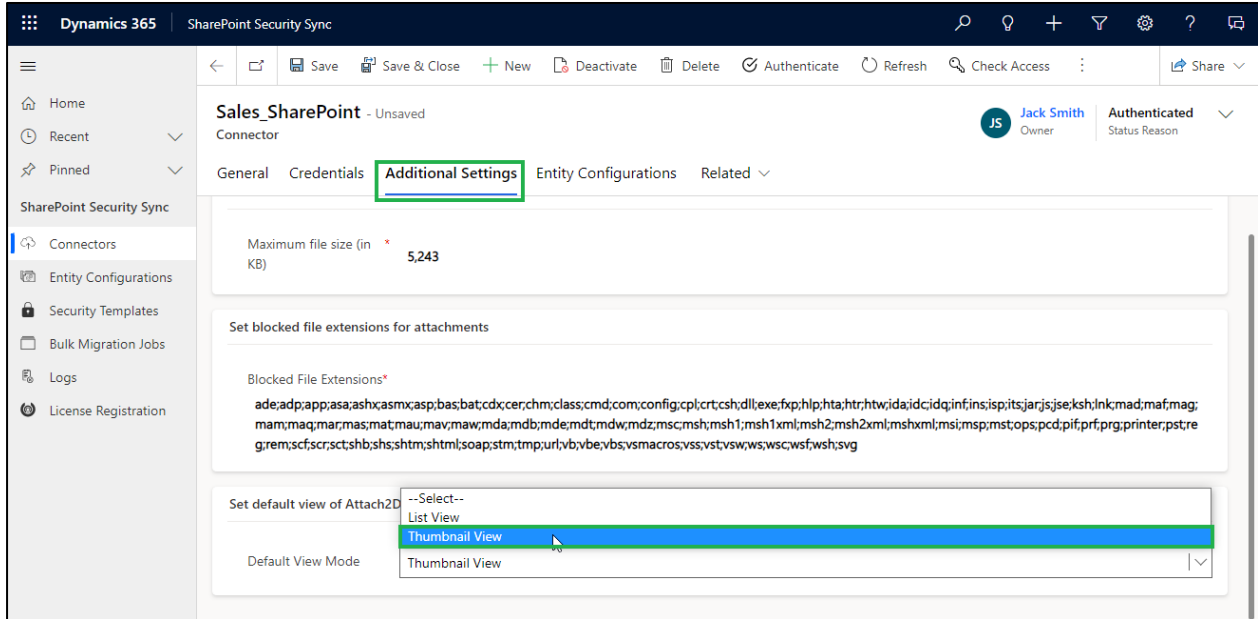


- To set Thumbnail View as your default view follow the steps given below:
- Navigate to **SharePoint Security Sync App** --> **Connectors** and **Click** on required **Connector Record**.

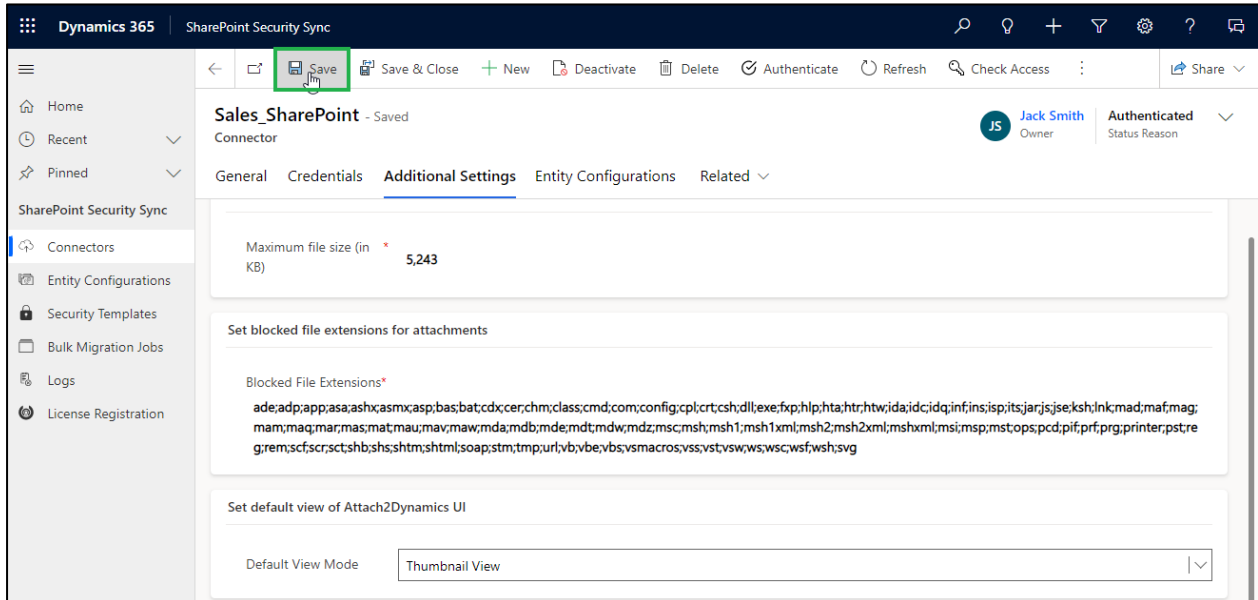


- Go to **Additional Settings** and **Select** default view of your '**Attach2Dynamics UI**' as '**Thumbnail View**'.

SharePoint Security Sync – User Manual



- Click on 'Save'.



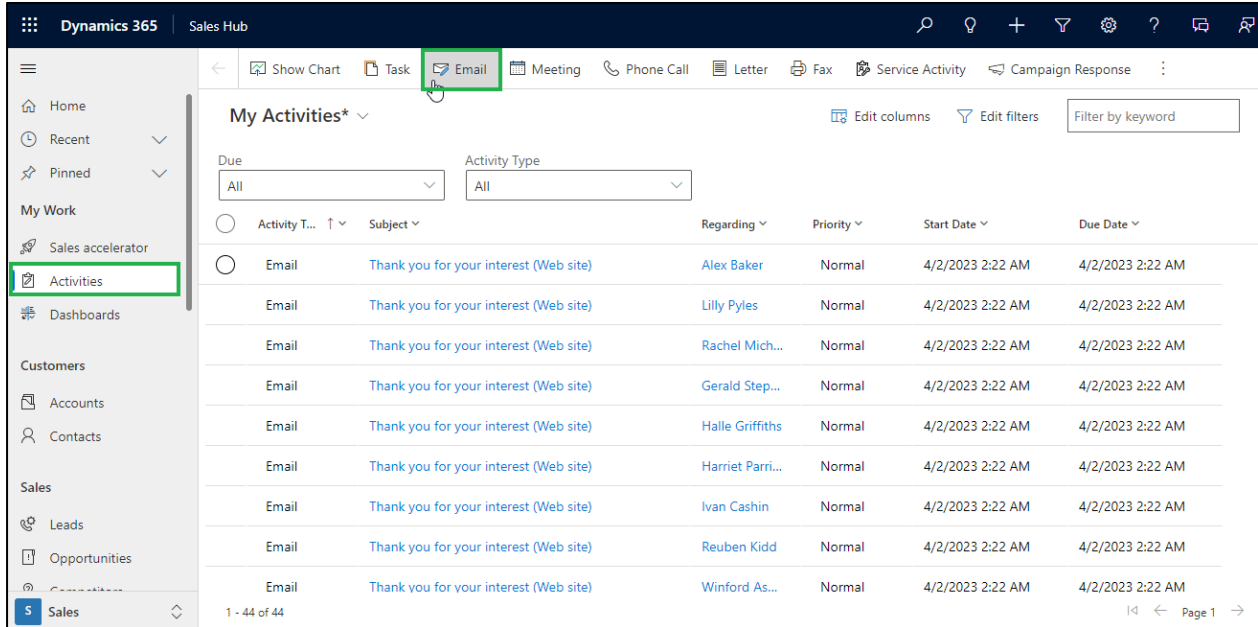
s) Attach Files of Various Records Directly from Email Form

With this feature, users can attach files/documents of various records directly from email activity form without switching between different entities.

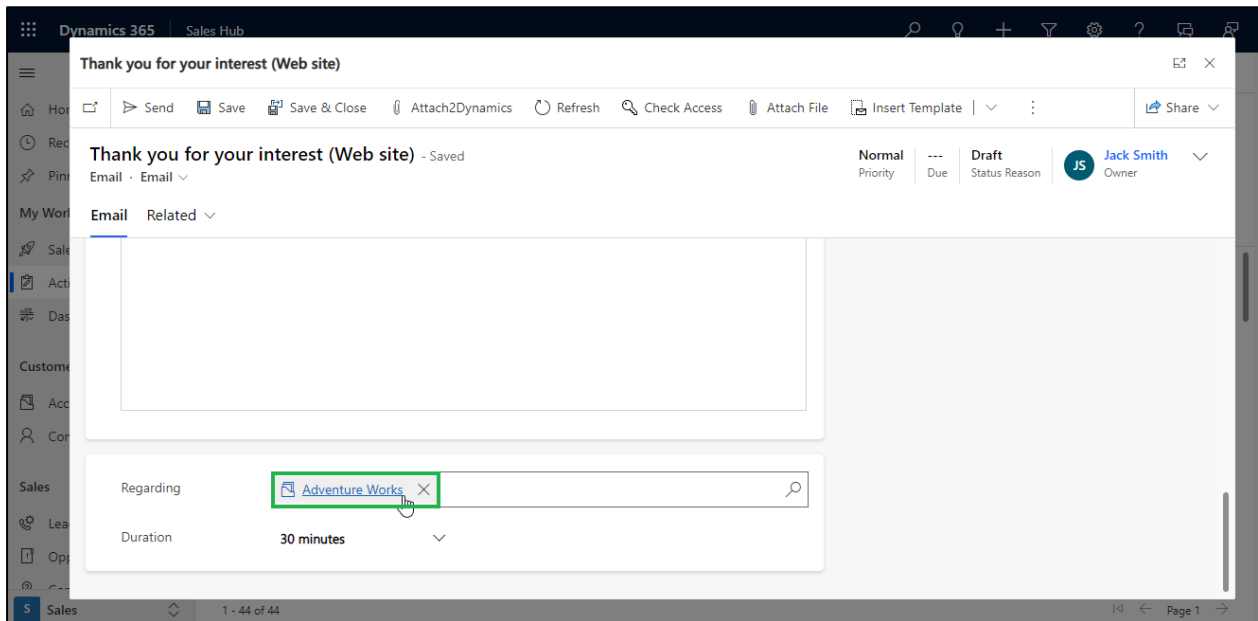
To attach files/documents as links or attachments directly on Email form, please follow the steps given below:

- Navigate to Activities --> Click on 'Email' activity.

SharePoint Security Sync – User Manual

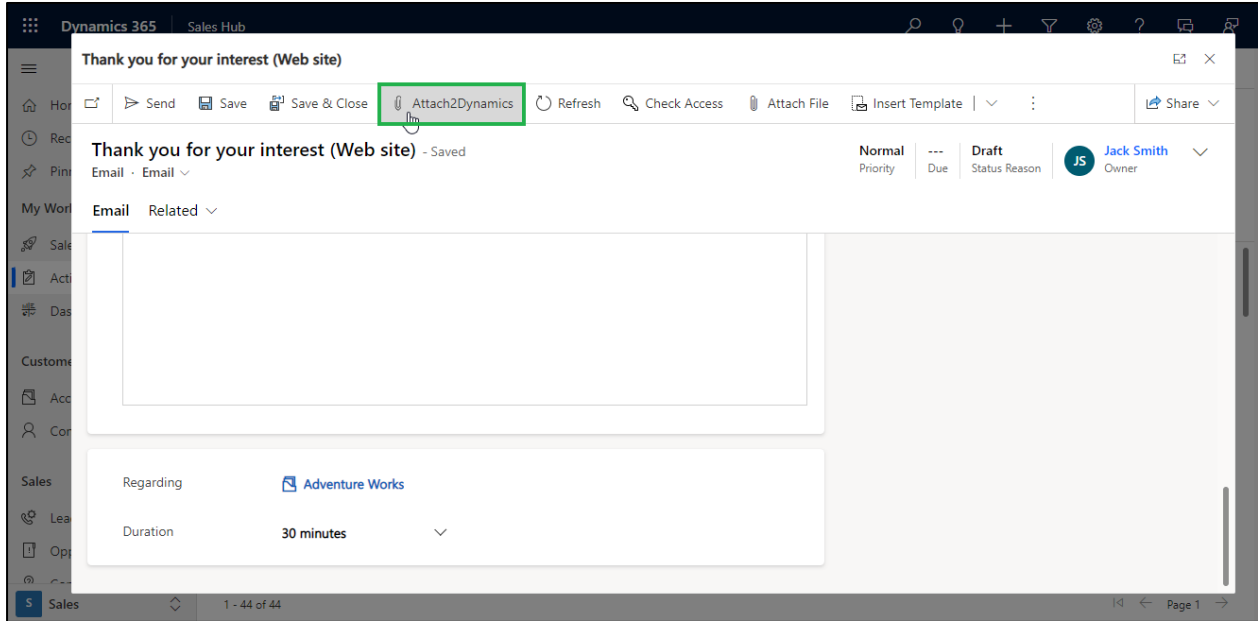


- Select the desired **record** from the regarding field.

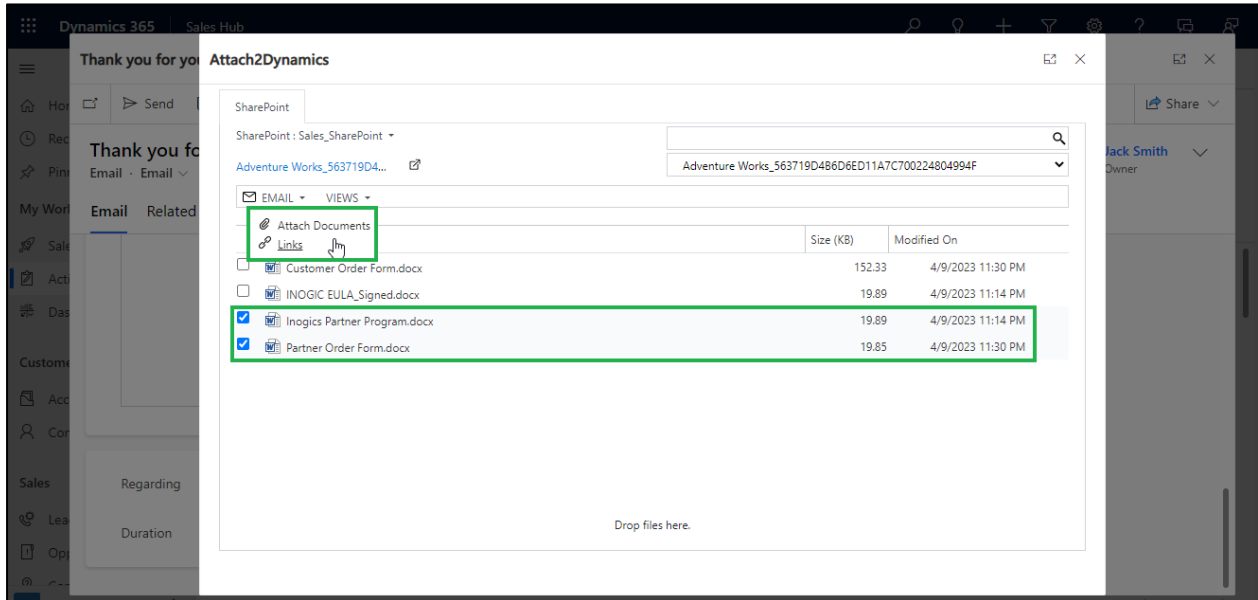


- Click on 'Attach2Dynamics' Button.

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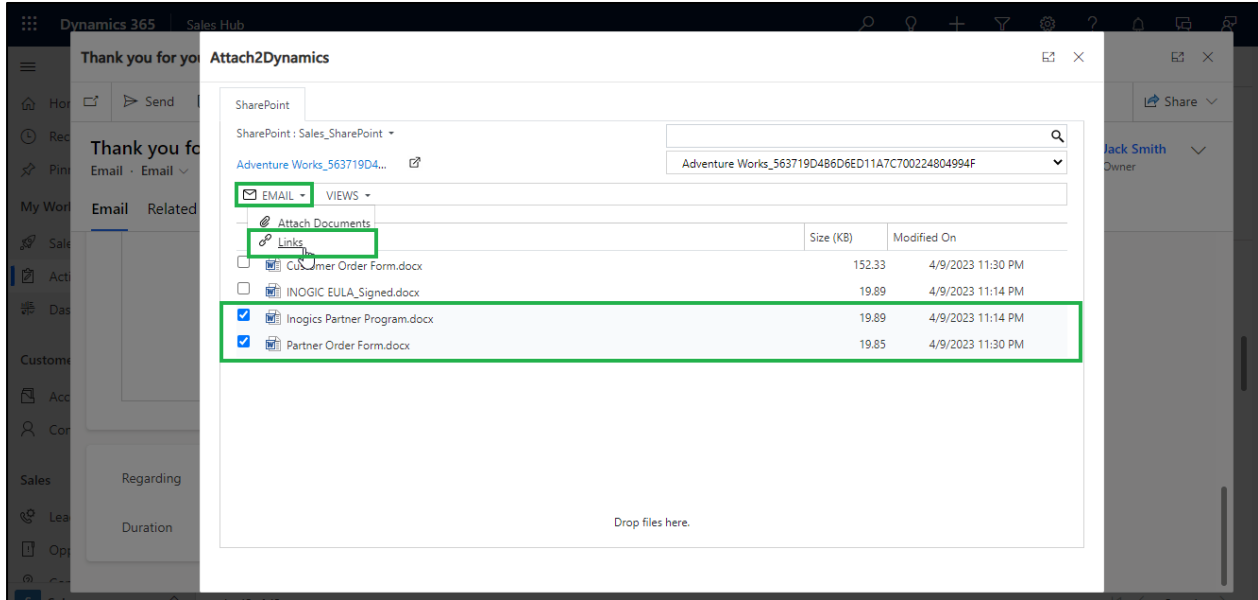


- Now select the required files and attach them as links or attachments on Email form.

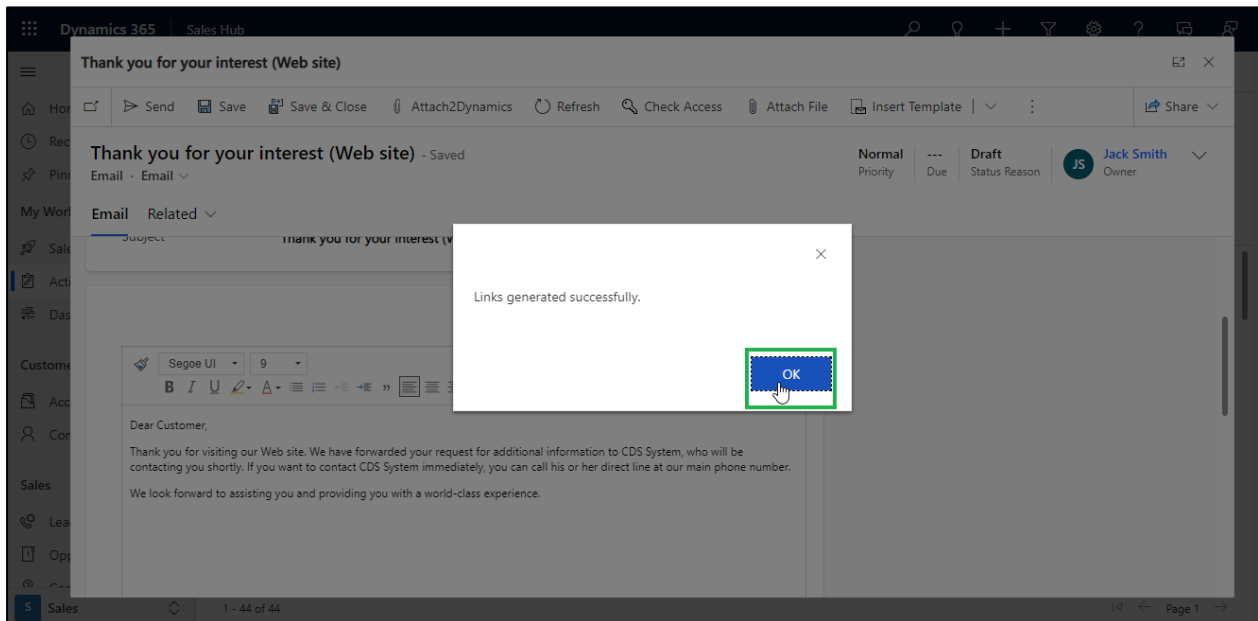


- Attach as Links:** To attach files as links, follow the steps given below.
 - Select the desired files and click on '**Links**' option on the '**EMAIL**' Dropdown.

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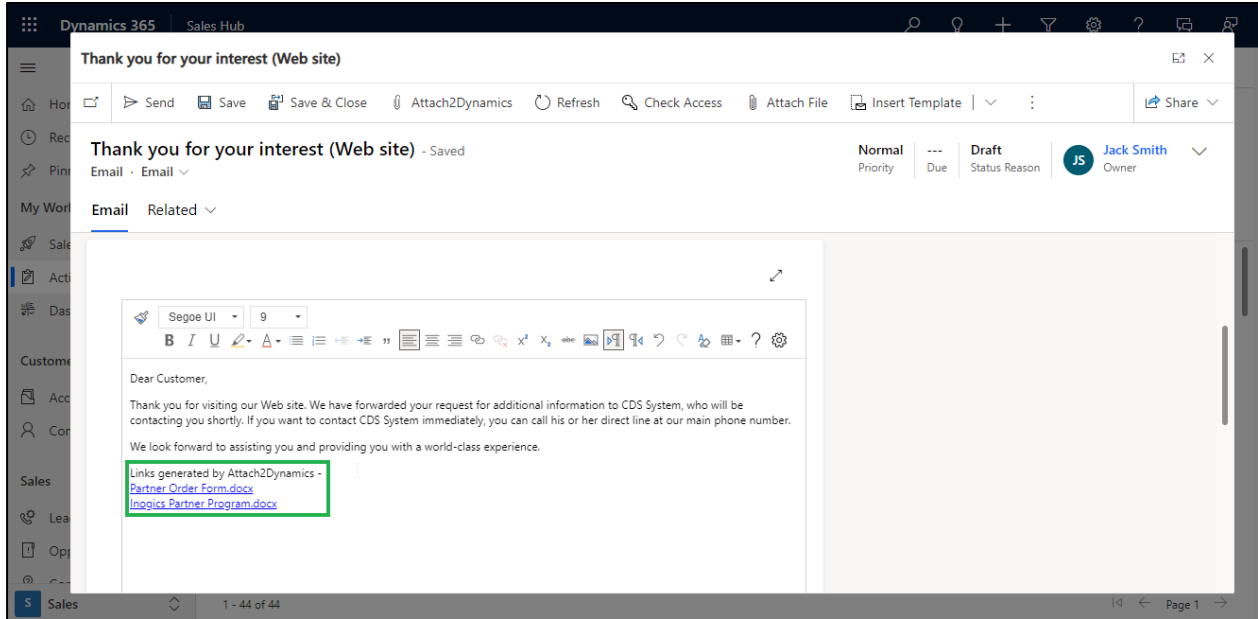


- Click 'ok'.



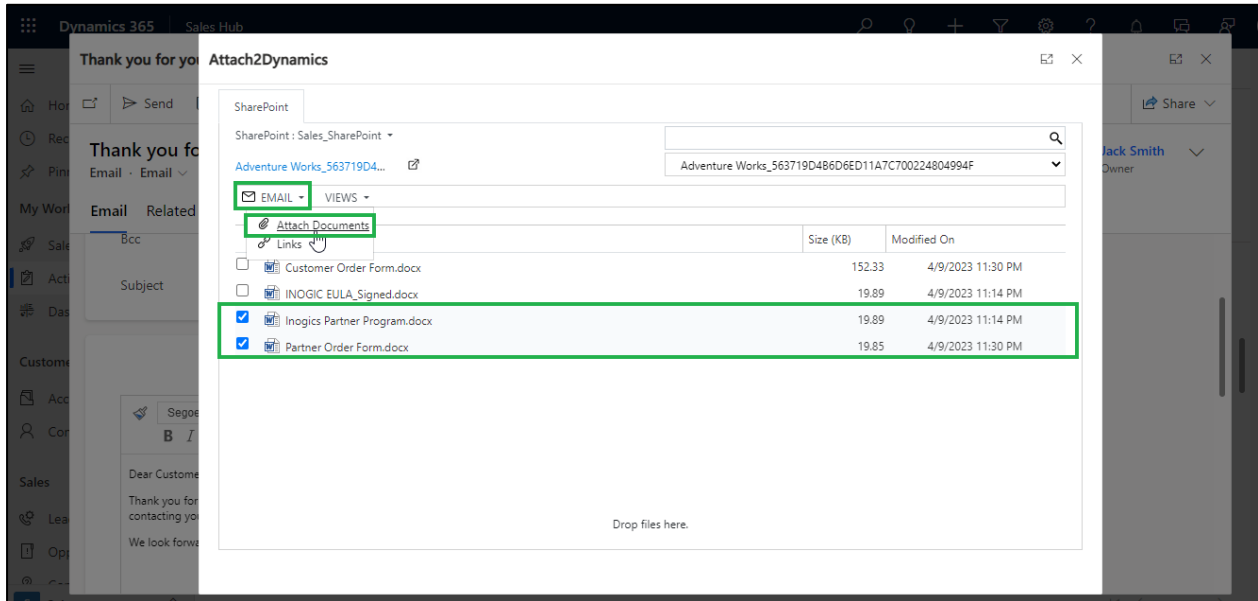
- Links to respective files on records will be generated successfully.

SharePoint Security Sync – User Manual



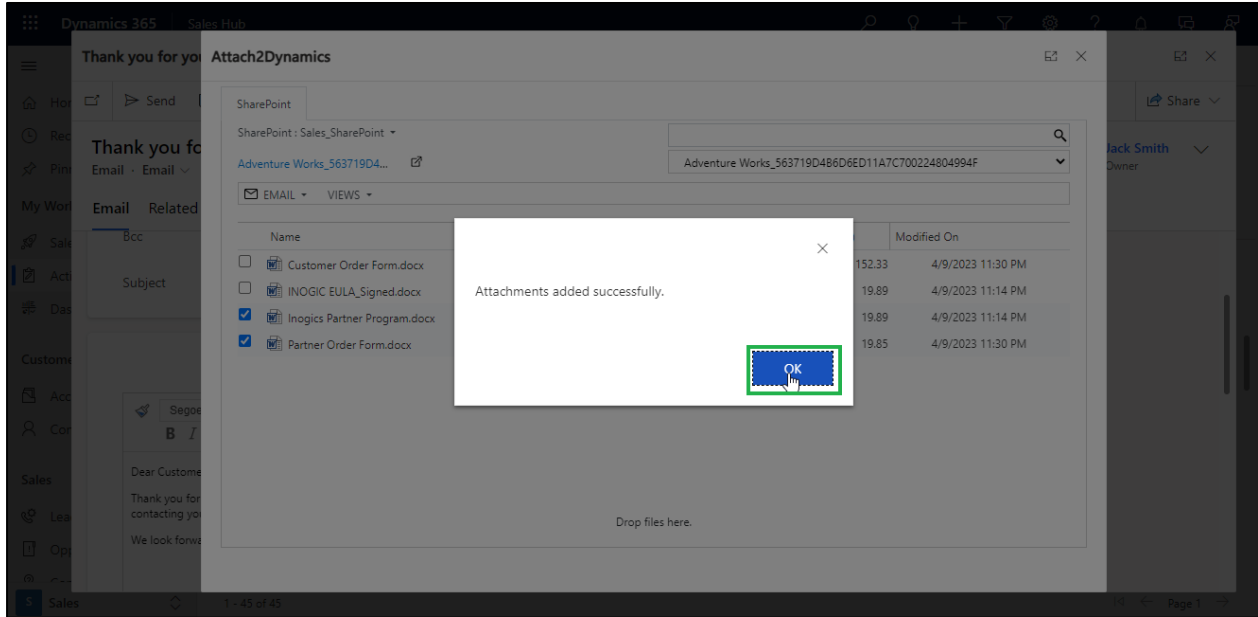
ii. **Attach as Documents:** To attach files as documents, follow the steps given below.

- Select the desired files and click on **'Attach Documents'** option on the **'EMAIL'** Dropdown.

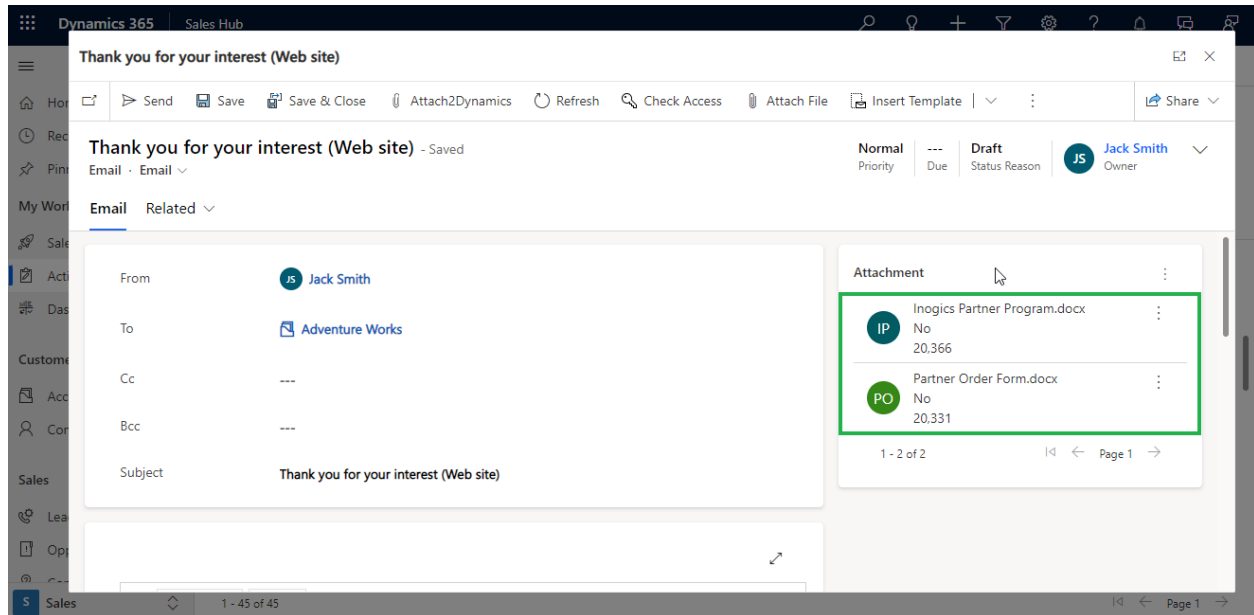


- Click **'ok'**.

SharePoint Security Sync – User Manual



- Selected documents will be successfully attached on the email form.

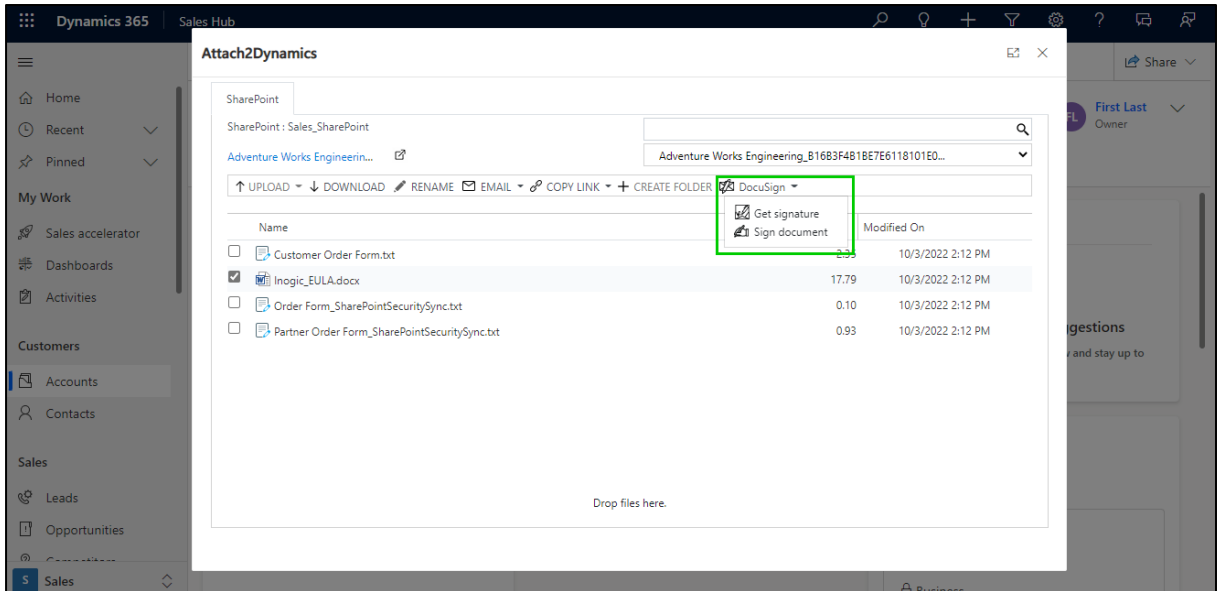


- t) **DocuSign:** Users are given the provision to use the features of DocuSign to electronically sign documents/attachments stored in SharePoint. Once the DocuSign option is enabled, the DocuSign button will be displayed on Attach2Dynamics UI. Users can now select a document and use the **'Get Signature'** functionality or **'Sign Document'** feature by clicking on the respective button.

To download the DocuSign solution, kindly click [here](#).

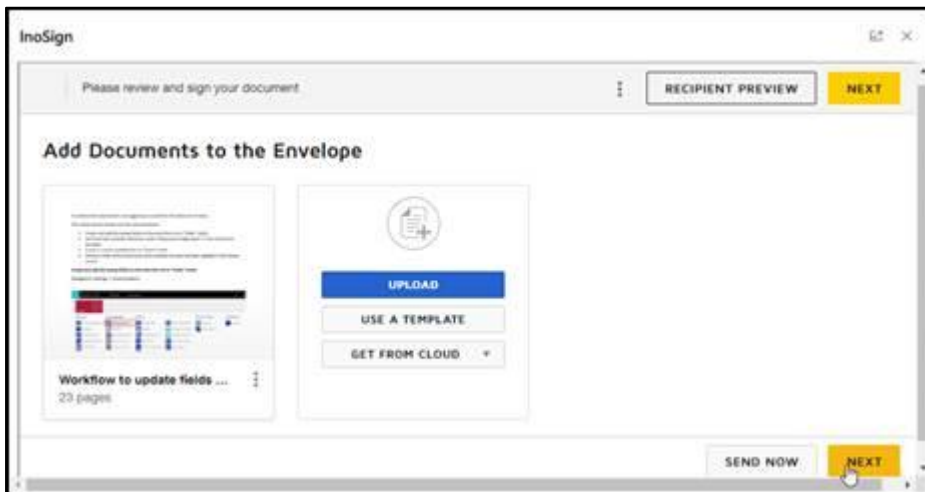
SharePoint Security Sync – User Manual

Note: To use this feature, both DocuSign solution and SharePoint Security Sync solution must be installed.

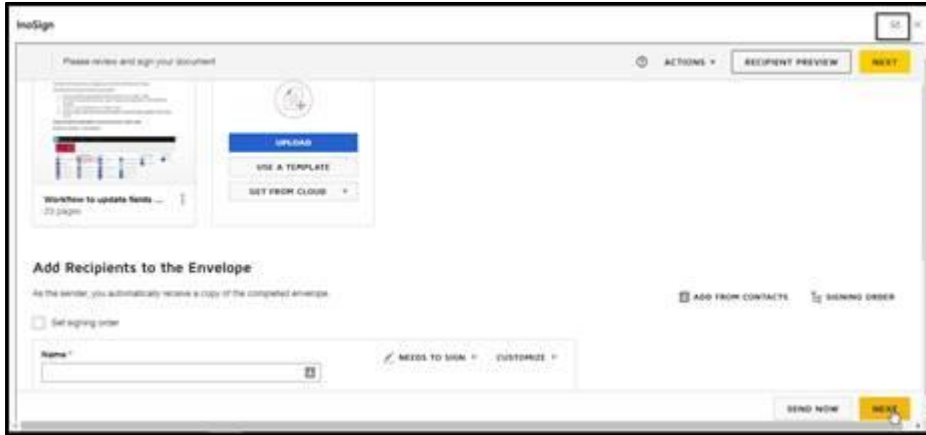


Note : The entity for which you want to use the DocuSign feature should be enabled for notes.

After clicking on the button, a Pop-up will open containing the selected document.



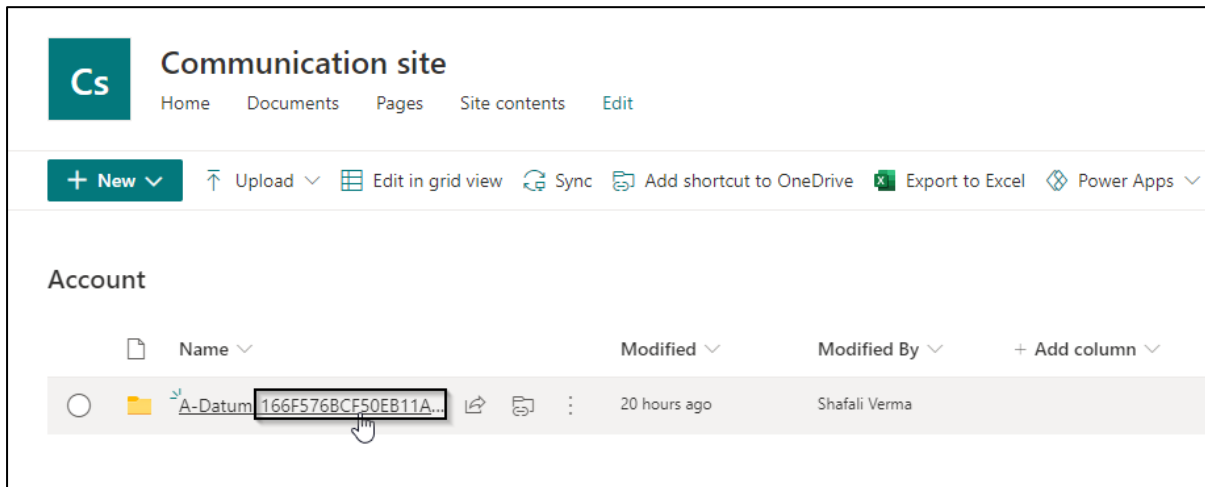
Users can switch to Fullscreen/default screen mode using the highlighted icon in the below screenshot.



Note: It may take time to load the DocuSign UI.

How to remove GUID?

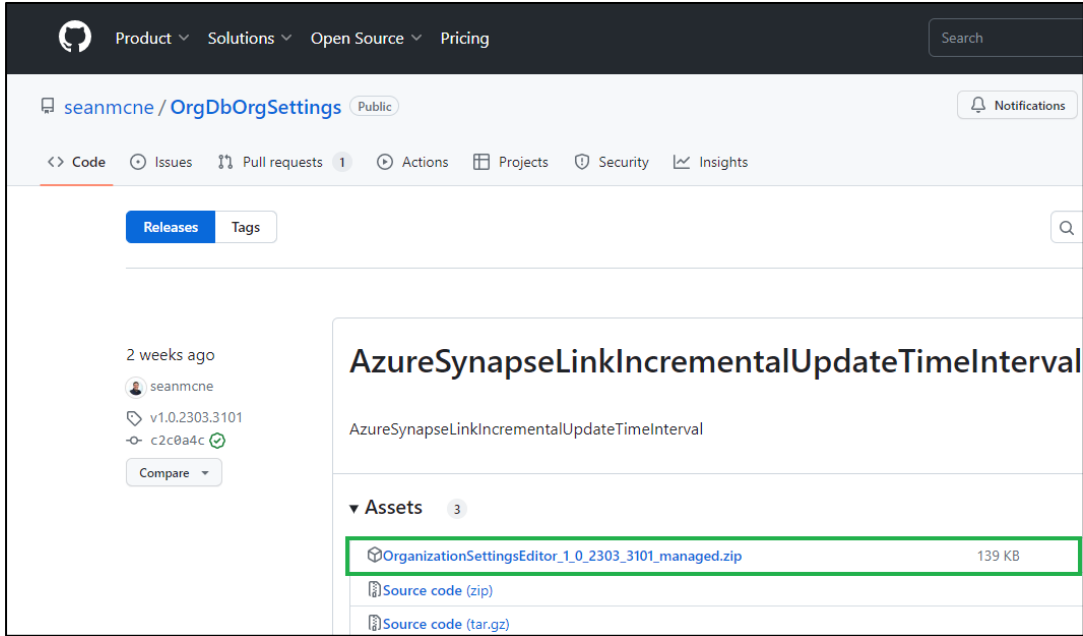
When a document is uploaded to the SharePoint using Attach2Dynamics or using OOB Documents tab in SharePoint, a folder with record name is created in the SharePoint. But along with the name, GUID (Unique ID of the record) is also added in the SharePoint folder name as shown in the below screenshot this GUID:



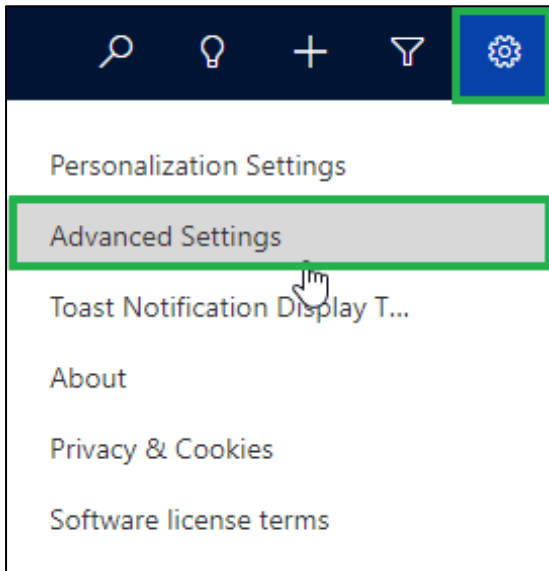
The Appended GUID (Numbers) are irrelevant to the end user.

To remove the GUID you first need to change the organization settings of CRM. To change the settings, please follow the steps given below:

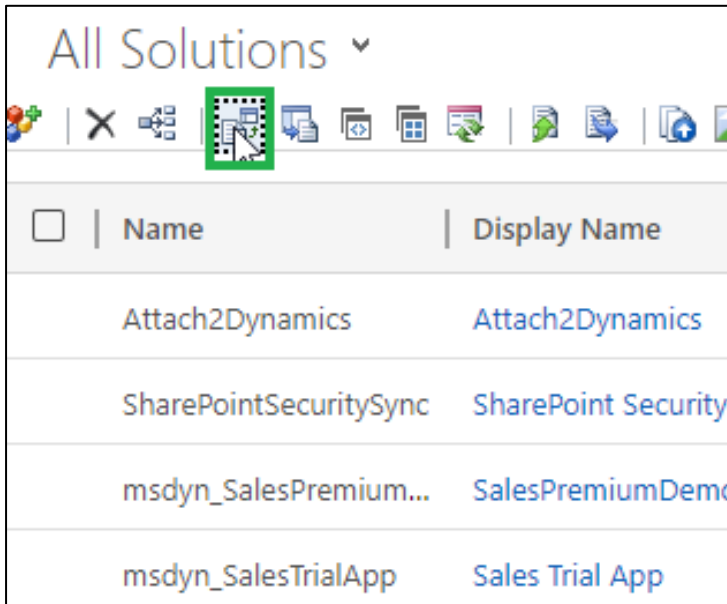
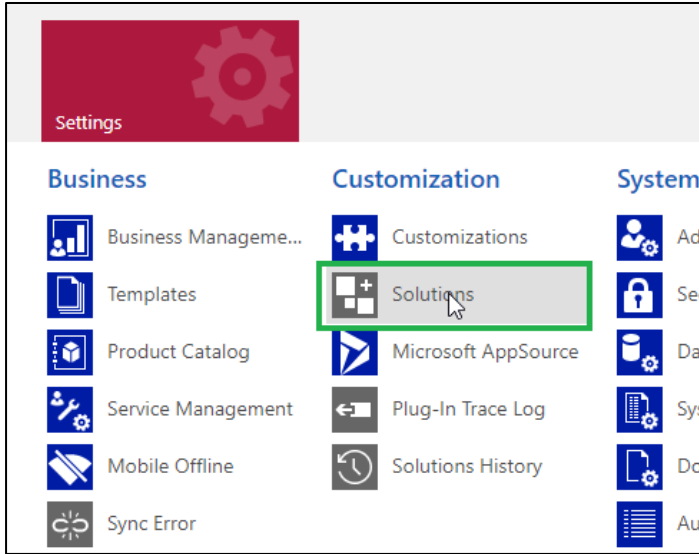
- Navigate to the [link](#) and download the **'OrganizationSettingsEditor'** solution file by clicking on the name as shown in the below screenshot.



- Once the solution is downloaded, import it into your environment.
- Click on the **gear icon** --> **Select Advanced Settings**.

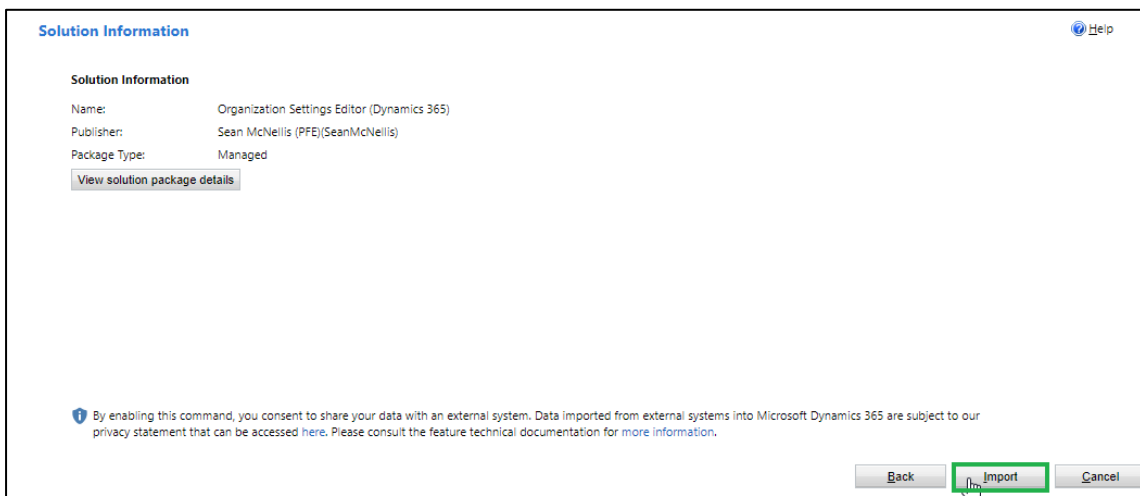
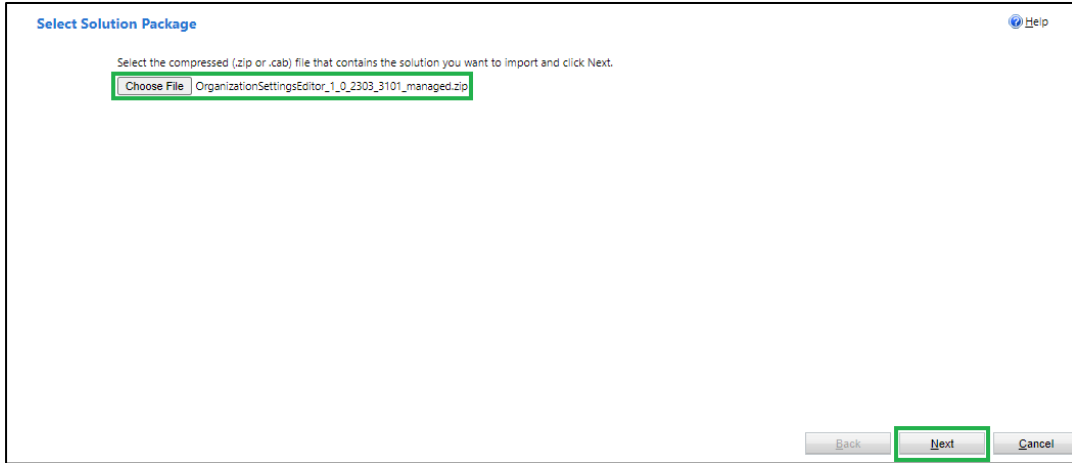


- Navigate to **Settings** --> **Solutions** --> Click on 'Import solution' button.



- Please choose the downloaded '**OrganizationSettingsEditor**' solution file and click on the '**Next**' button to proceed.

SharePoint Security Sync – User Manual



- After the solution is successfully imported, open the solution and navigate to the Configuration page and search for **'CreateSPFoldersUsingNameandGuid'**.

Dynamics 365 Settings Solutions

Web client experience for security settings is being deprecated. Please use the Power Platform admin center to leverage the latest experience and manage

All Solutions

Name	Display Name	Version	Installed On	Package Type	Publisher
OrganizationSettingsE...	Organization Settings ...	1.0.2303.3...	4/11/2023	Managed	Sean McNeillis (PFE)
Attach2Dynamics	Attach2Dynamics	9.0.0.37	4/2/2023	Managed	Inogic
SharePointSecuritySync	SharePoint Security Sy...	9.0.0.34	4/2/2023	Managed	Inogic

- By default, the **'Current Value'** of **'CreateSPFoldersUsingNameandGuid'** is set to true, to change it, and click on the edit button.

SharePoint Security Sync – User Manual

Solution Organization Settings Ed... Click a setting row for more details at the bottom of the page. NOTE: you should not change any setting without having a specific reason to do so.

Name	Default Value	Current Value	Type	Min	Max	Action	Support Url
ActivateAdditionalRefreshOfWorkflowConditions	false	not set	Boolean	-	-	Add	KB2691237
ActivityConvertDigCampaignUnchecked	true	not set	Boolean	-	-	Add	KB 2691237
ActivityRollupChildRecordLimit	10000	not set	Number	1	50000	Add	KB 2691237
AddressBookMaterializedViewsEnabled	true	not set	Boolean	-	-	Add	KB2691237
AllowClientMessageBarAd	true	true	Boolean	-	-	Edit	Organization entity attributes
AllowDisabledUsersAddedToOwnerTeams	False	not set	Boolean	-	-	Add	Manage teams
AllowParamsNoEquals	false	not set	Boolean	-	-	Add	KB 2691237
AllowPromoteDuplicates	false	not set	Boolean	-	-	Add	None
AllowRoleAssignmentOnDisabledUsers	False	false	Boolean	-	-	Edit	KB 2691237
AllowSaveAsDraftAppointment	false	not set	Boolean	-	-	Add	KB 2691237
AlwaysCheckTraceLogDeletePrivilege	false	not set	Boolean	-	-	Add	KB 2691237
AlwaysMoveRecordToOwnerBusinessUnit	true	not set	Boolean	-	-	Add	KB 2691237
appointmentricheditorexperience	false	false	Boolean	-	-	Edit	Organization entity attributes
AuthorizationAppLockTimeOutInMilliSeconds	300000	not set	Number	1	999999	Add	KB 2691237
AuthorizationExpiredDataCleanUpInDays	30	not set	Number	-1	999999	Add	KB 2691237
AuthorizationLockUserTimeOutInSeconds	3	not set	Number	1	999999	Add	KB 2691237
AuthorizationSkipAadUserStateValidation	false	not set	Boolean	-	-	Add	KB 2691237
AuthorizationTransactionTimeOutInMilliSeconds	60000	not set	Number	1	999999	Add	KB 2691237
AutoCreateContactOnPromote	true	not set	Boolean	-	-	Add	KB 2691237
AutoTrackSentFolderItems	false	not set	Boolean	-	-	Add	KB 2849744
BackgroundSendBatchSize	10	not set	Number	1	255	Add	KB 2691237
BPFInstanceDaysModifiedForOfflineSync	365	not set	Number	0	30	Add	KB 2691237
BuildsCountBeforeUsingSubqueryForPostsSecurity	500	not set	Number	1	2100	Add	KB 2691237
CanCreateApplicationStubUser	False	false	Boolean	-	-	Edit	KB 2691237
ChangeDoubleQuoteToSingleQuote	false	not set	Boolean	-	-	Add	KB 2849744
CleanInheritedAccessWhenRepairantOrShareCascadingNone	false	not set	Boolean	-	-	Add	KB 2691237
ClientDisableTrackingForReplyForwardEmails	0	not set	Number	0	1	Add	KB2691237
ClientUIPDisabled	false	not set	Boolean	-	-	Add	KB 2691237
CreateQueueItemForSynchronizingMailbox	true	not set	Boolean	-	-	Add	KB 2691237
CreateQueueItemsForAcceptingQueueRecipients	true	not set	Boolean	-	-	Add	KB 2691237
CreateSPFoldersUsingNameandGuid	true	true	Boolean	-	-	Edit	KB2691237
DefaultHeightForWizardReports	0	not set	Double	-	-	Add	KB 2849744

- Enter 'false' (lower case) in 'CreateSPFoldersUsingNameandGuid' field --> Click on 'Update' button --> Click on 'OK' button from the confirmation pop-up.

Solution Organization Settings Ed... Click a setting row for more details at the bottom of the page. NOTE: you should not change any setting without having a specific reason to do so.

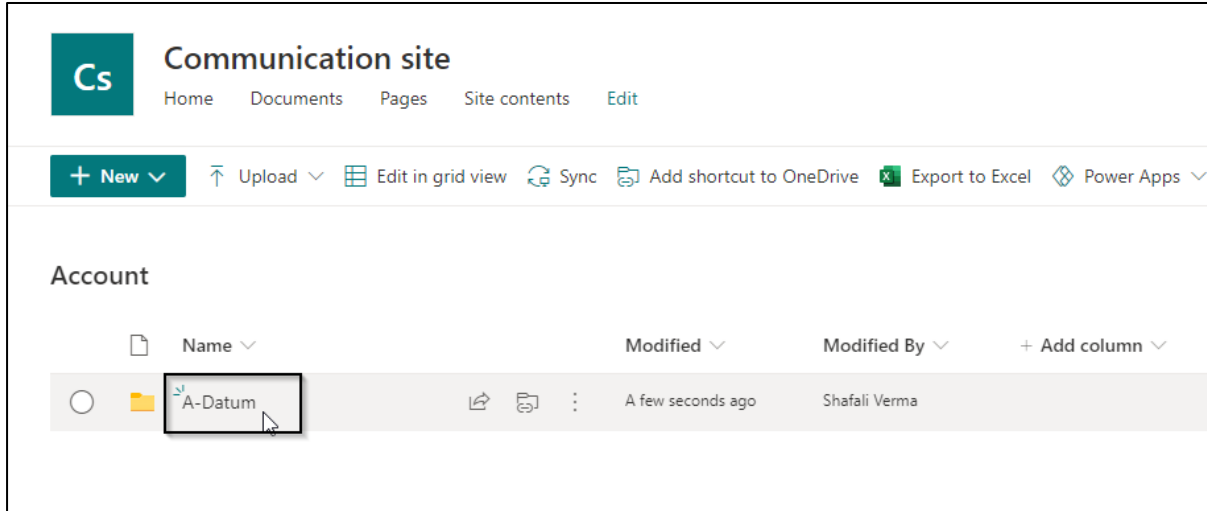
Name	Default Value	Current Value	Type	Min	Max	Action	Support Url
ActivateAdditionalRefreshOfWorkflowConditions	false	not set	Boolean	-	-	Add	KB2691237
ActivityConvertDigCampaignUnchecked	true	not set	Boolean	-	-	Add	KB 2691237
ActivityRollupChildRecordLimit	10000	not set	Number	1	50000	Add	KB 2691237
AddressBookMaterializedViewsEnabled	true	not set	Boolean	-	-	Add	KB2691237
AllowClientMessageBarAd	true	true	Boolean	-	-	Edit	Organization entity attributes
AllowDisabledUsersAddedToOwnerTeams	False	not set	Boolean	-	-	Add	Manage teams
AllowParamsNoEquals	false	not set	Boolean	-	-	Add	KB 2691237
AllowPromoteDuplicates	false	not set	Boolean	-	-	Add	None
AllowRoleAssignmentOnDisabledUsers	False	false	Boolean	-	-	Edit	KB 2691237
AllowSaveAsDraftAppointment	false	not set	Boolean	-	-	Add	KB 2691237
AlwaysCheckTraceLogDeletePrivilege	false	not set	Boolean	-	-	Add	KB 2691237
AlwaysMoveRecordToOwnerBusinessUnit	true	not set	Boolean	-	-	Add	KB 2691237
appointmentricheditorexperience	false	false	Boolean	-	-	Edit	Organization entity attributes
AuthorizationAppLockTimeOutInMilliSeconds	300000	not set	Number	1	999999	Add	KB 2691237
AuthorizationExpiredDataCleanUpInDays	30	not set	Number	-1	999999	Add	KB 2691237
AuthorizationLockUserTimeOutInSeconds	3	not set	Number	1	999999	Add	KB 2691237
AuthorizationSkipAadUserStateValidation	false	not set	Boolean	-	-	Add	KB 2691237
AuthorizationTransactionTimeOutInMilliSeconds	60000	not set	Number	1	999999	Add	KB 2691237
AutoCreateContactOnPromote	true	not set	Boolean	-	-	Add	KB 2691237
AutoTrackSentFolderItems	false	not set	Boolean	-	-	Add	KB 2849744
BackgroundSendBatchSize	10	not set	Number	1	255	Add	KB 2691237
BPFInstanceDaysModifiedForOfflineSync	365	not set	Number	0	30	Add	KB 2691237

CreateSPFoldersUsingNameandGuid

Update Reset Default Remove Setting Cancel

Default: True - creates SharePoint folders using the format of (Name)+(GUID).
False: Creates SharePoint folders using just the name.

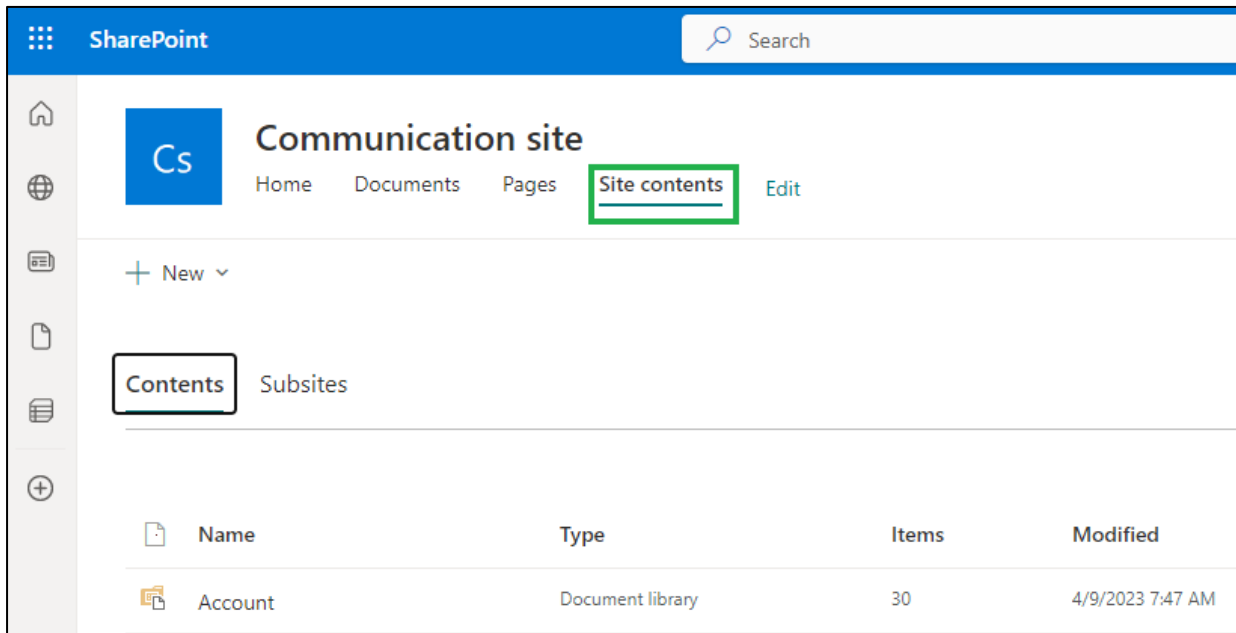
Note: SharePoint Folders created after applying the above settings will be created without GUID, the history folders in SharePoint which are created before the above settings will remain with GUID as shown in the below screenshot.



Sharing SharePoint Site

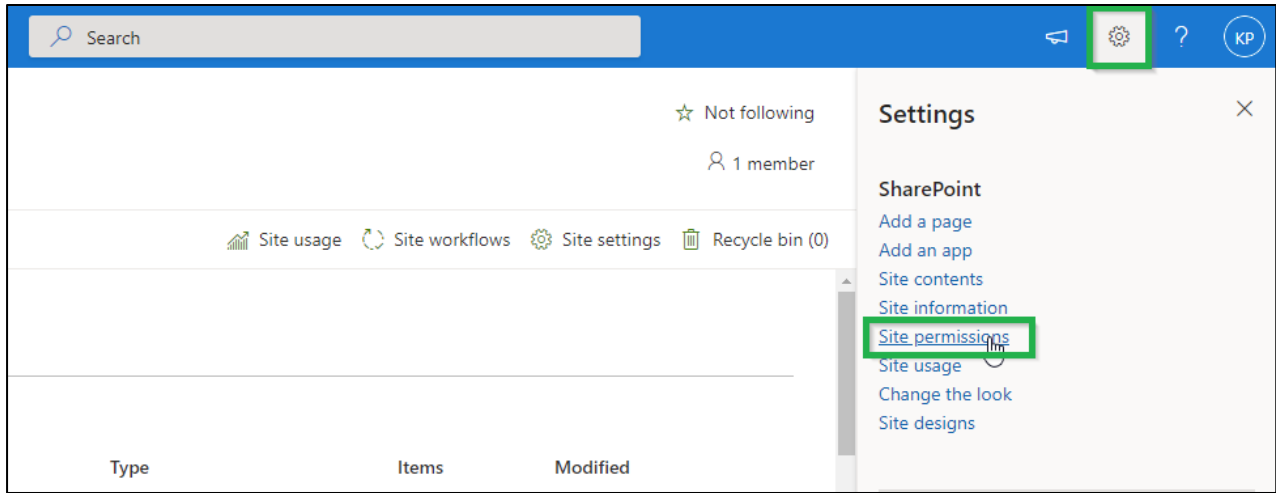
If you want to share the SharePoint site with the users who doesn't have access to the SharePoint site then, follow the steps given below. These are the steps taken from the point of view of user who is the SharePoint Site Owner.

- Open the SharePoint site for which the user doesn't have access --> Click on the Site contents tab.

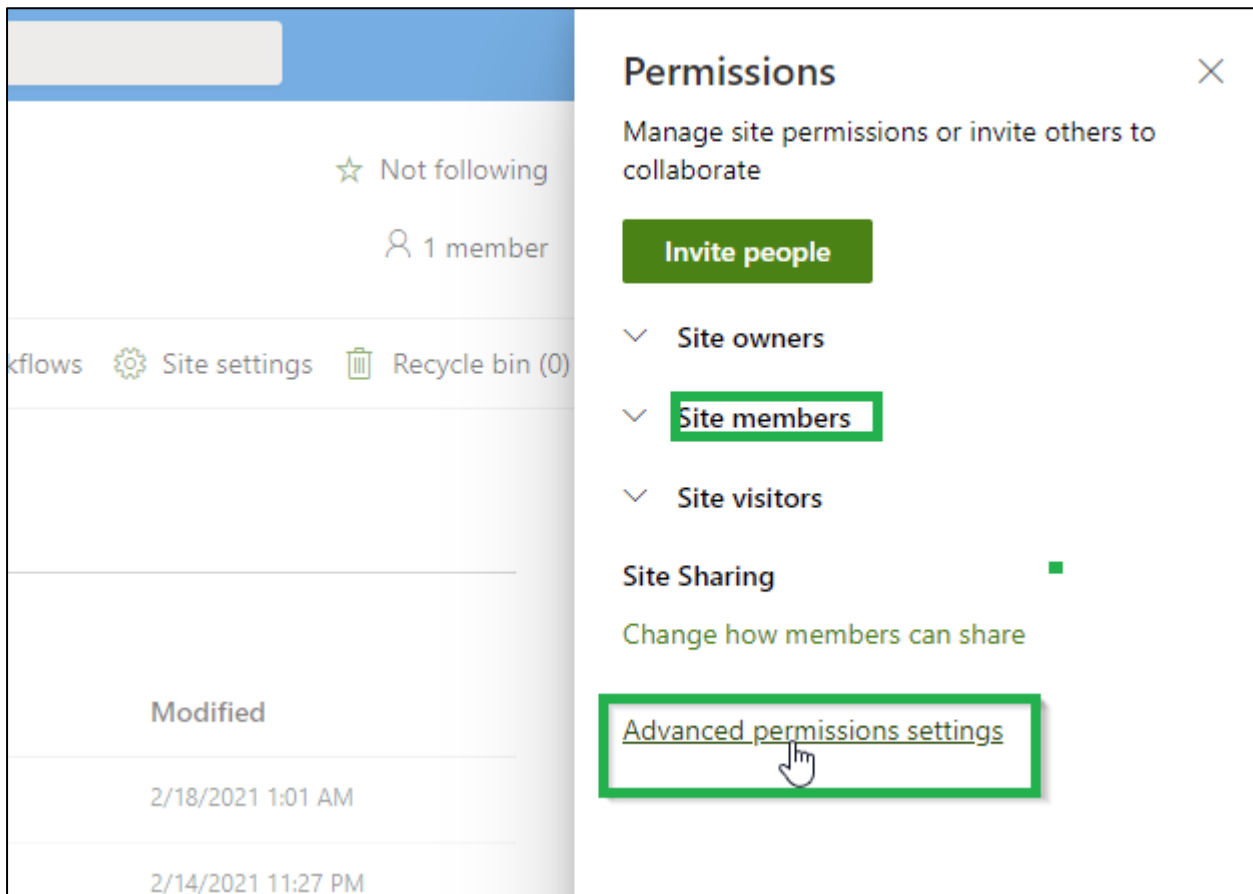


SharePoint Security Sync – User Manual

- Click on the Setting button on the top which is highlighted in the below screenshot --> Click on the Site Permissions.

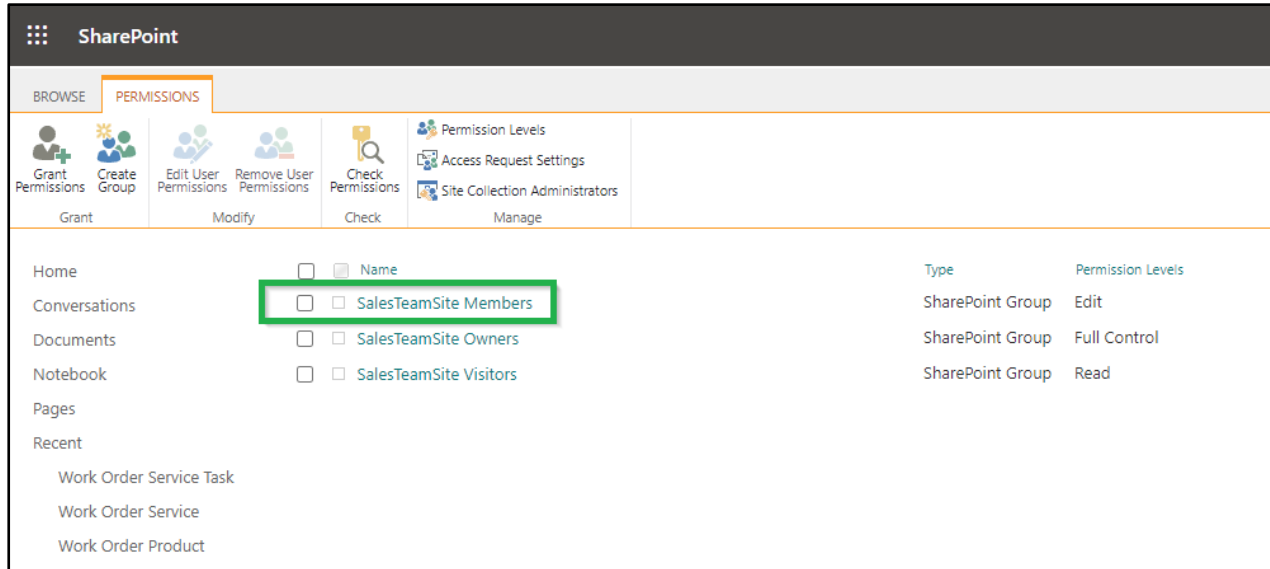


- Next, click on the Advanced permissions settings.

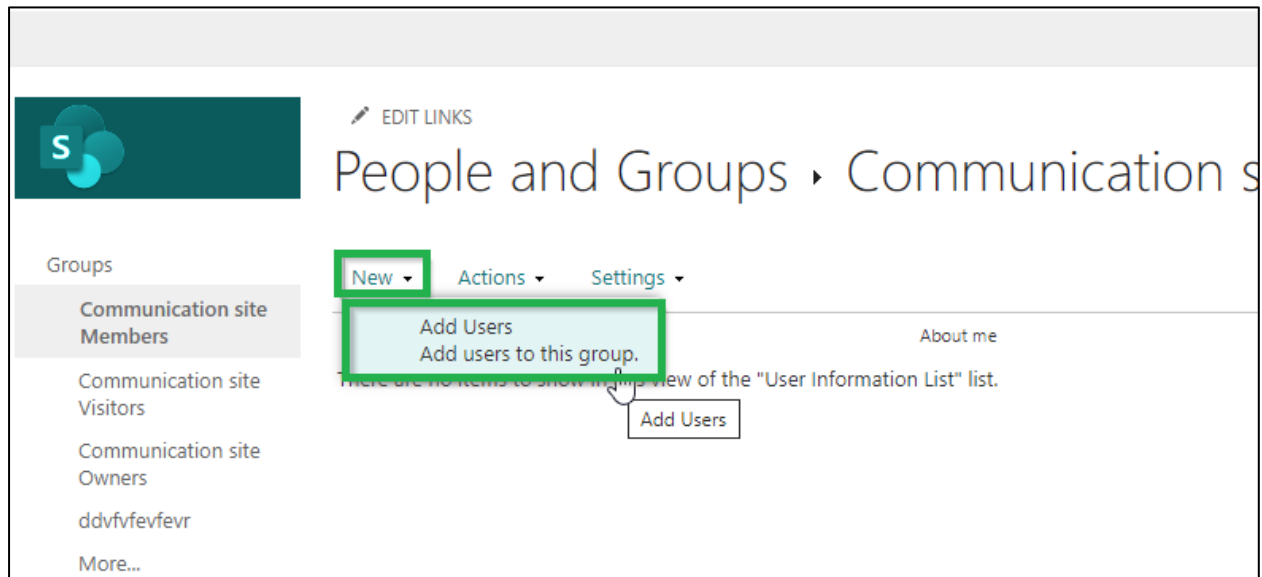


SharePoint Security Sync – User Manual

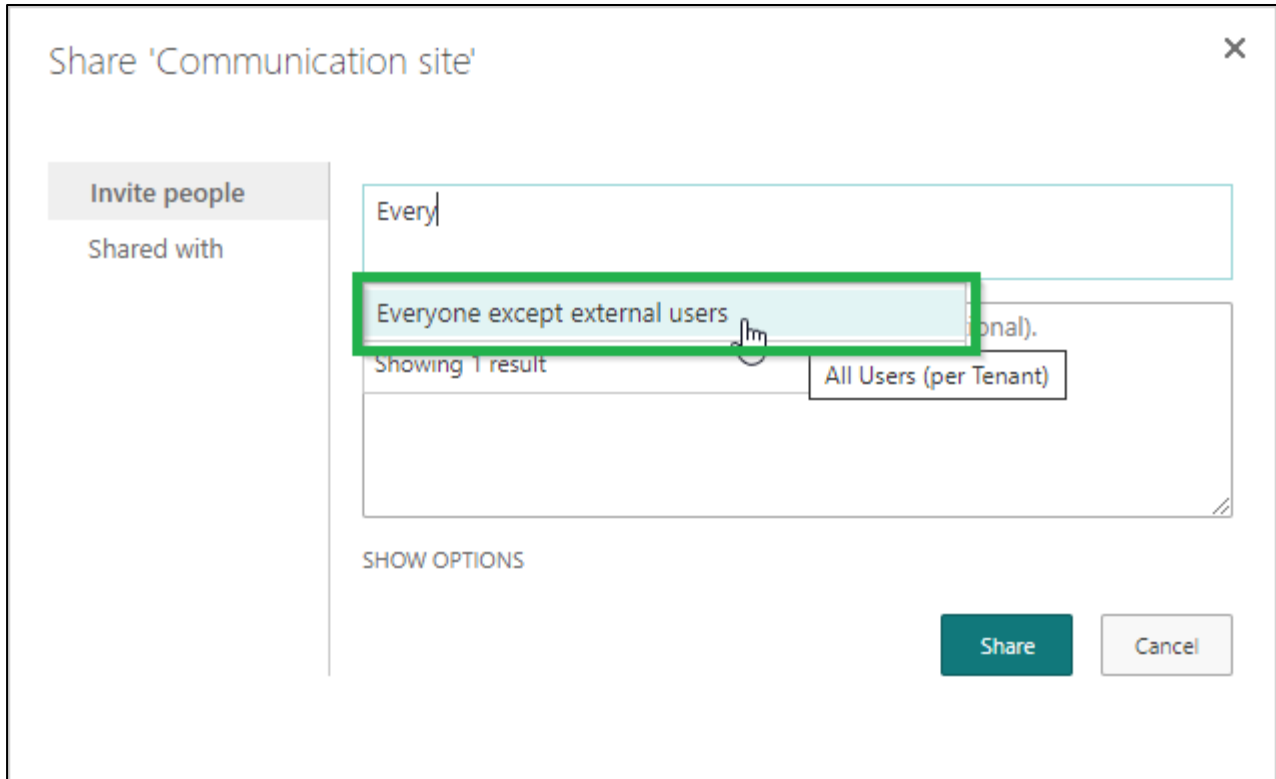
- Now you will find three option from which you need to select the option {YourSiteName} Members.



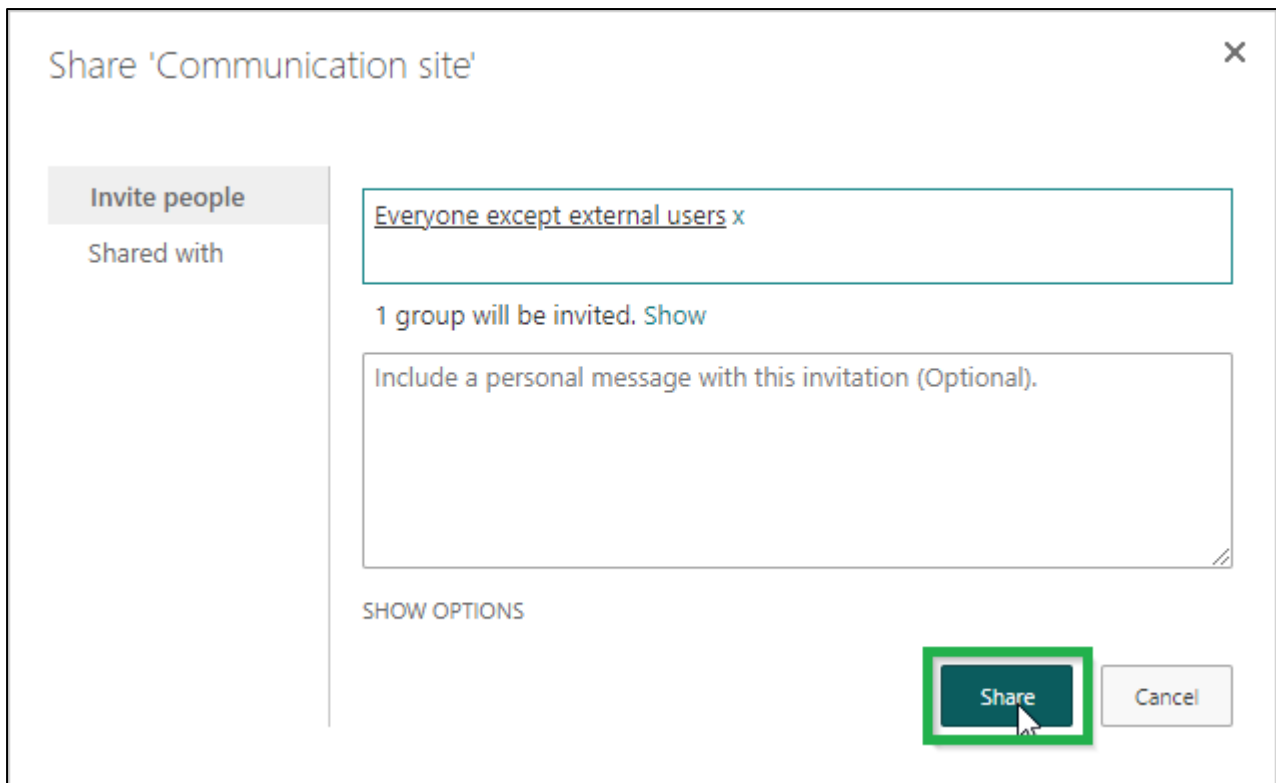
- Click on the New button dropdown --> Select Add Users Add users to this group.



- Now enter 'Everyone except external users', you will automatically get the suggestion please select it.



- After selecting the option, click on the Share button.



After sharing the site, the users will be able to access the site and will not get the permission issue from the Attach2Dynamics UI.

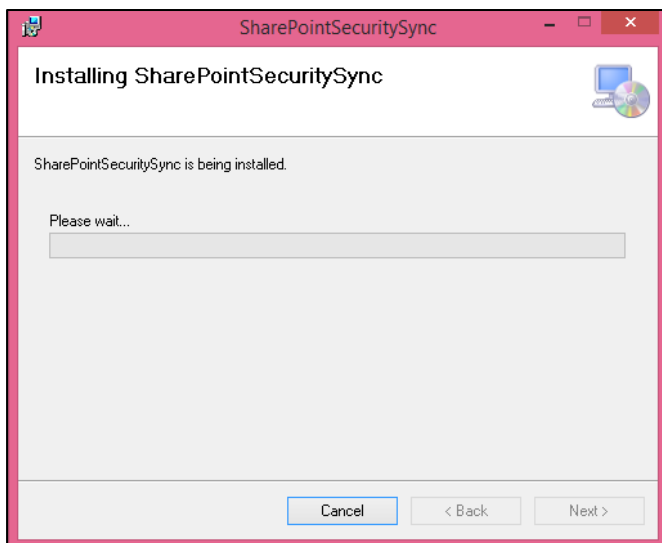
SharePoint Security Sync Tool

SharePoint Security Sync Tool enables you to sync previous records in bulk. Syncing security privileges for records in bulk is a tedious and time consuming task. In such situation SharePoint Security Sync Tool can be used to carry out this huge task. It relatively takes less time to sync records with SharePoint Security Sync Tool.

Pre-requested - .NET Framework 4.6.2 or above.

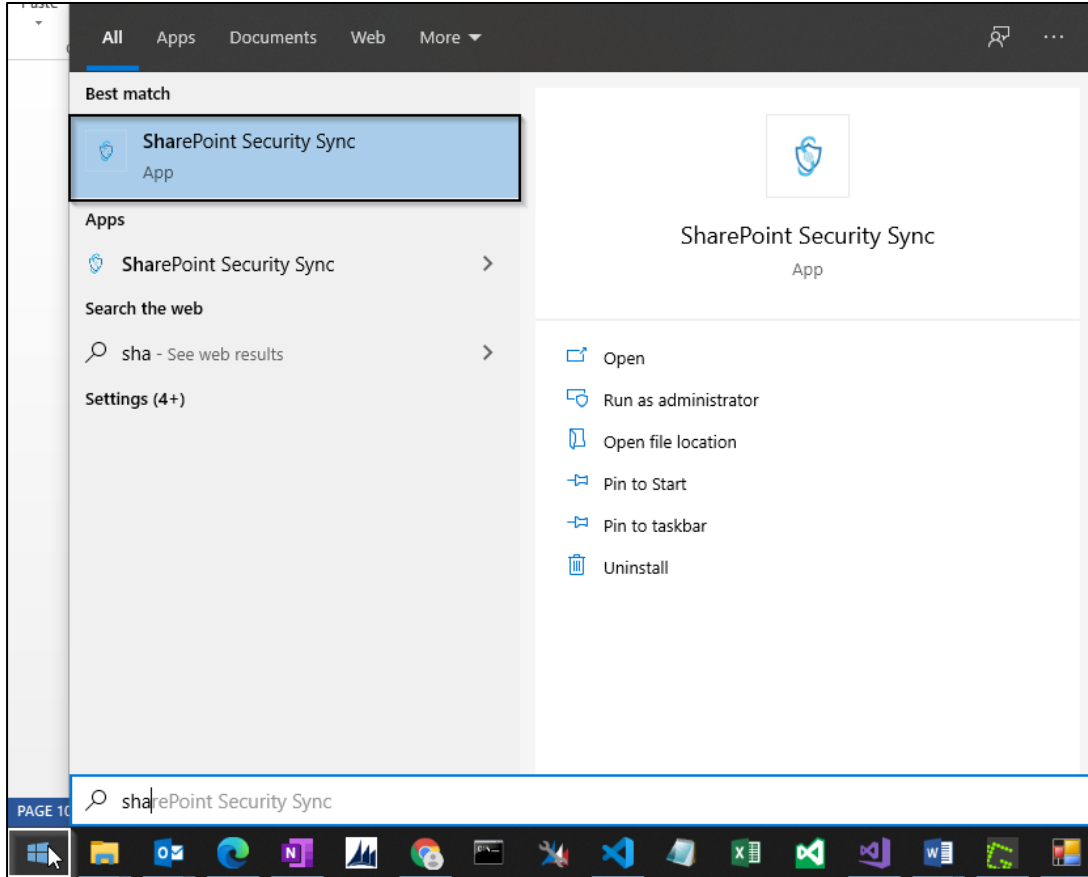
SharePoint Security Sync Tool Installation

Download and Install SharePoint Security Sync tool in your system.



After installing the tool, follow the steps given below:

- Click on the SharePoint Security Sync Tool icon to open the tool.



- Select deployment type as '**Office 365**' and fill the following details in given fields.
 - **Display list of available organizations:** Enable the checkbox in case of multiple organizations in CRM
 - **Online Region:** Select the respective region
 - **Username:** Use the CRM username
 - **Password:** Use the CRM password

After filling all the details click on '**Login**'.

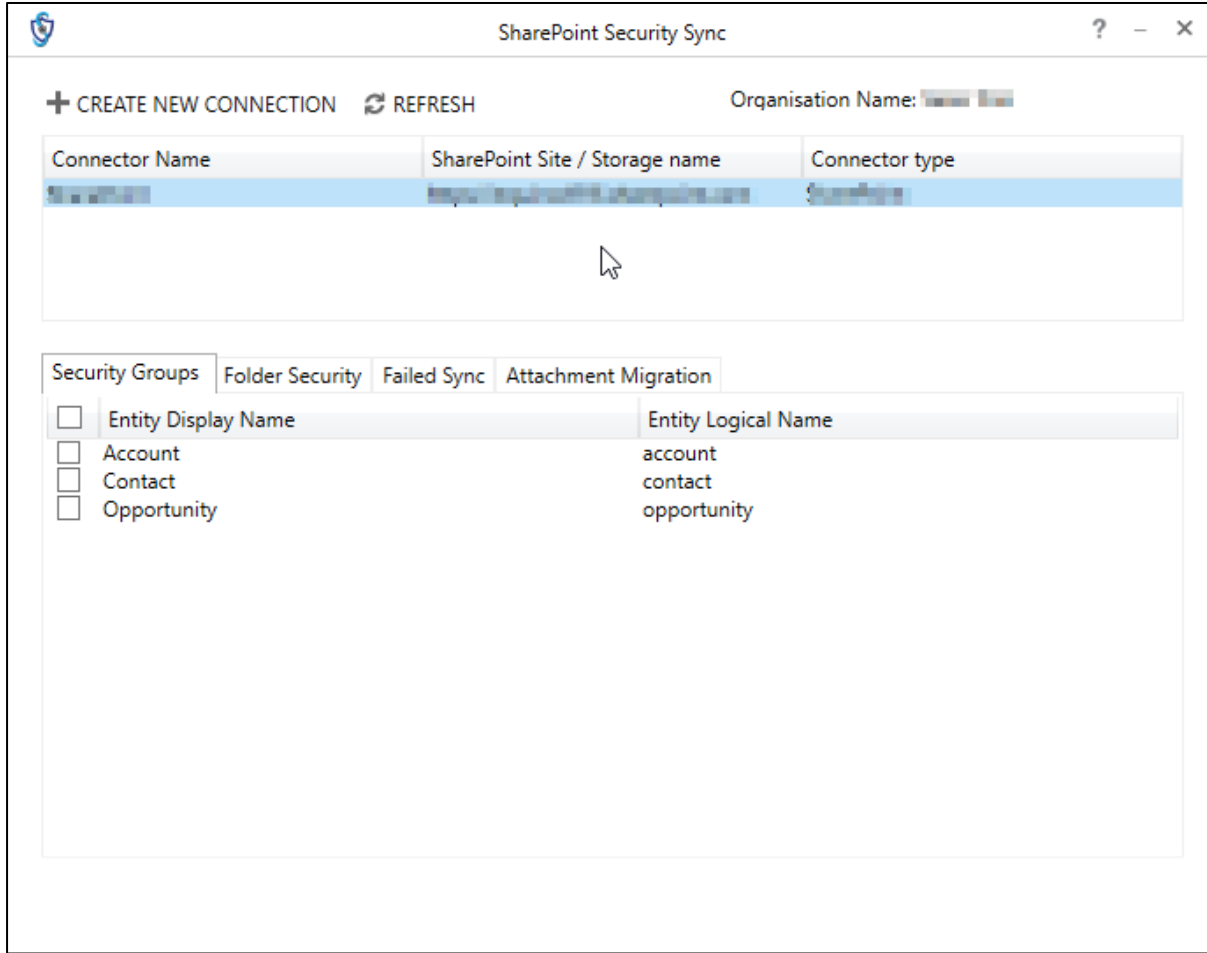
The screenshot shows a window titled "SharePoint Security Sync" with a standard Windows title bar (minimize, maximize, close buttons). The window content is titled "Login". Under "Deployment Type:", there are two radio buttons: "On-premises" (unselected) and "Office 365" (selected). Below this are three checkboxes: "Sign in as current user" (unchecked), "Display list of available organizations" (unchecked), and "Show Advanced" (checked). A section titled "Advanced" contains three input fields: "Online Region" (a dropdown menu), "User Name" (a text box), and "Password" (a text box with masked characters). At the bottom of the dialog are two buttons: "Login" and "Cancel". A mouse cursor is pointing at the "Login" button.

SharePoint Security Sync Tool Functions

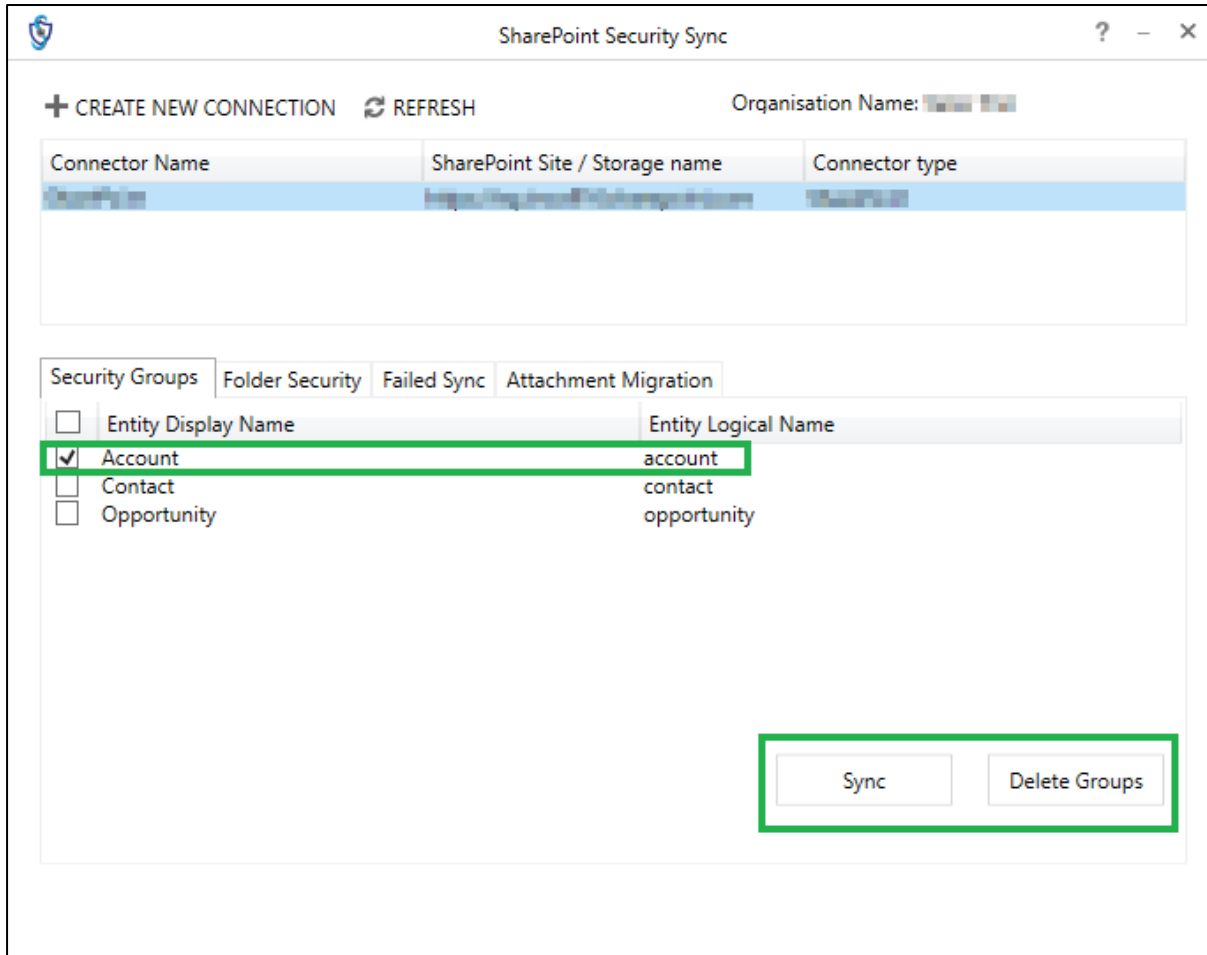
Once logged in, you will find details of all the configured connectors. Select any one of the connectors for which you want to sync the security privileges. If more connectors are added then click on 'Refresh' button on the top to update connector details.

Now let's go through the different functions of SharePoint Security Sync Tool.

1. First click on the respective SharePoint Site.
2. After clicking on respective SharePoint Site, **four** new tabs will be displayed – **Security Groups, Folder Security, Failed Sync and Attachment management.**



- Now, click on first tab – **Security Groups**. Here, all the existing configured entities will be displayed. Select any entity. After selecting the entity, two buttons will appear – **Sync and Delete Groups**. Click on **'Sync'** button to create groups against that entity. Click on **'Delete Groups'** to delete all the existing groups against that entity.



- Next tab is **Folder Security**. With this tab, you can **synchronize** records for a selected period. You can also select particular user/users from the **drop-down menu** and apply **folder security** to the records they owned.

For example, if your CRM has 6 users and you want to sync records of only a particular user for “Account” entity created during a particular period, then you can select that specific user from the dropdown menu and click on Sync button as shown in the below-given image in order to sync records.

SharePoint Security Sync – User Manual

SharePoint Security Sync

+ CREATE NEW CONNECTION REFRESH Organisation Name: [Redacted]

Connector Name	SharePoint Site / Storage name	Connector type
[Redacted]	[Redacted]	[Redacted]

Security Groups Folder Security Failed Sync Attachment Migration

<input type="checkbox"/>	Entity Display Name	Entity Logical Name	From Date	To Date	Users
<input checked="" type="checkbox"/>	Account	account	08-12-2020 <input type="text" value="15"/>	08-12-2020 <input type="text" value="15"/>	[Dropdown]
<input type="checkbox"/>	Contact	contact	08-12-2020 <input type="text" value="15"/>	08-12-2020 <input type="text" value="15"/>	<input type="checkbox"/> George Stark
<input type="checkbox"/>	Opportunity	opportunity	08-12-2020 <input type="text" value="15"/>	08-12-2020 <input type="text" value="15"/>	<input checked="" type="checkbox"/> Jack Smith
					<input type="checkbox"/> James P
					<input type="checkbox"/> Joe P
					<input type="checkbox"/> Rhea p
					<input type="checkbox"/> Sam P

Sync

Sync records of

SharePoint Security Sync – User Manual

SharePoint Security Sync

+ CREATE NEW CONNECTION REFRESH Organisation Name: Sales Team

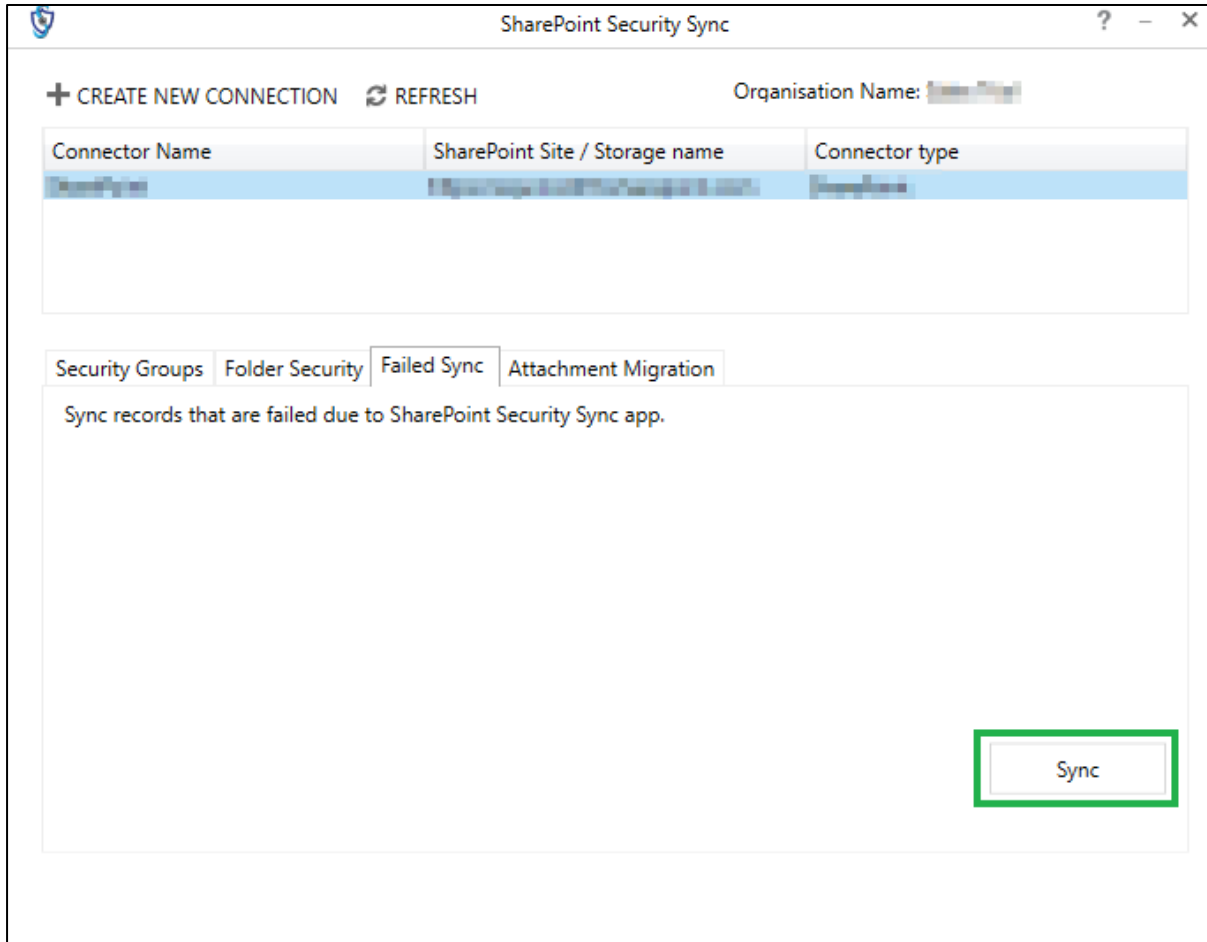
Connector Name	SharePoint Site / Storage name	Connector type
...

Security Groups Folder Security **Failed Sync** Attachment Migration

<input type="checkbox"/>	Entity Display Name	Entity Logical Name	From Date	To Date	Users
<input checked="" type="checkbox"/>	Account	account	08-12-2020 15	08-12-2020 15	Jack Smith
<input type="checkbox"/>	Contact	contact	08-12-2020 15	08-12-2020 15	
<input type="checkbox"/>	Opportunity	opportunity	08-12-2020 15	08-12-2020 15	

Sync

- The third tab is **Failed Sync**. Click on the **'Sync'** button to sync all the failed records.



6. The last tab is to perform the **Bulk Migration Job** i.e. **Move/ Copy** the past attachments from Dynamics CRM to SharePoint. You are required to fill the following fields for smooth migration of attachments:
- **For?:** This specifies whether you are doing Bulk Migration for Activities, Notes or Sales Literature.
 - **Entity:** Select the entity for which you want to migrate attachments.
 - **Action:** Select either '**Copy**' or '**Move**'.
 - **From:** Enter the date from which you want to start the migration job.
 - **To:** Enter the end date till which you want to do the migration.

The screenshot shows the SharePoint Security Sync application window. At the top, there is a header with the application name and window controls. Below the header, there are buttons for '+ CREATE NEW CONNECTION' and 'REFRESH', along with a field for 'Organisation Name'. A table lists connectors with columns for 'Connector Name', 'SharePoint Site / Storage name', and 'Connector type'. Below the table, there are tabs for 'Security Groups', 'Folder Security', 'Failed Sync', and 'Attachment Migration'. The 'Attachment Migration' tab is active, showing configuration options for 'For?' (Activities), 'Entity' (Meeting,Email), 'Action' (Copy), 'From' (01-09-2020), and 'To' (08-12-2020). A 'Proceed' button is highlighted with a green border.

Connector Name	SharePoint Site / Storage name	Connector type
SharePoint	https://sharepoint/.../.../...	SharePoint

Security Groups | Folder Security | Failed Sync | Attachment Migration

For?

Entity

Action

From

To

SharePoint Security Sync Use Case

To better understand how SharePoint Security Sync works let's consider a use case.

Consider there are 2 users – User A and User B. Here, User A has organizational level access. This provides User A access to all records in both Dynamics 365 CRM and SharePoint.

Access in Dynamics 365 CRM:

SharePoint Security Sync – User Manual

Account Name	Main Phone	Address 1: City	Primary Contact
Alpine Ski House	+43-1-12345-0	Vienna	Cathan Cook
Blue Yonder Airlines	555-0135	Sydney	Brian LaMee
City Power & Light Assembly	425-555-7824	Seattle	---
Coho Winery	+1-674-555-0162	Santa Cruz	Cat Francis

Access in SharePoint:

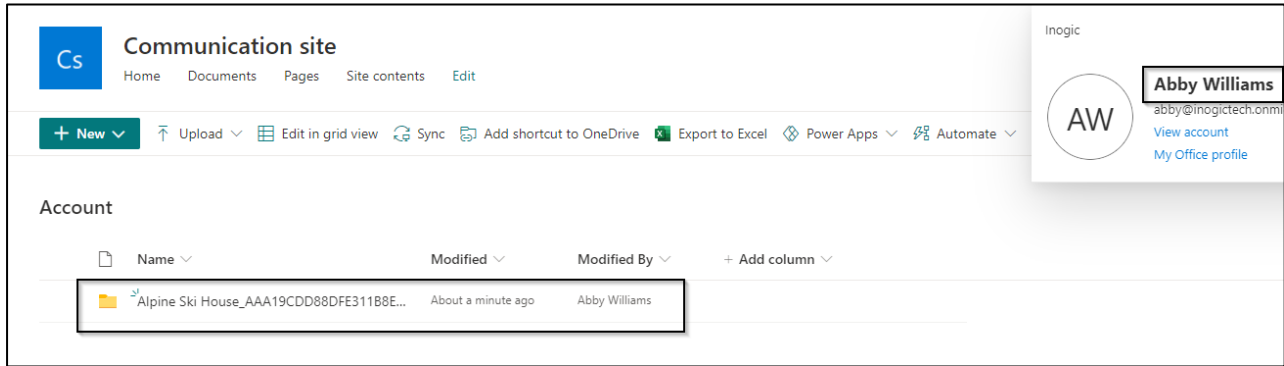
Name	Modified	Modified By
Alpine Ski House_AAA19CDD88DFE311B8E...	About a minute ago	Abby Williams
Blue Yonder Airlines_ACA19CDD88DFE311B...	A few seconds ago	Sam Sam
City Power - Light Assembly_D56B3F4B1BE...	About a minute ago	Sam Sam
Coho Winery_B0A19CDD88DFE311B8E56C3...	About a minute ago	Sam Sam

Now User B has only user level access. Here, User B will have access to only those records that are created by him/her.

Access in Dynamics 365 CRM:

Account Name	Main Phone	Address 1: City	Primary Contact
Alpine Ski House	+43-1-12345-0	Vienna	Cathan Cook

Access in SharePoint:



Log

View and track any errors occurred during the functioning of SharePoint Security Sync.

Contact Us

M/S. INOGIC TECH (INDIA) PVT. LTD.

A/301, Everest Nivara InfoTech Park,

TTC Industrial Area, MIDC, Turbhe

Navi Mumbai, Maharashtra 400705

INDIA

E-mail : crm@inogic.com

Skype : [crm@inogic.com](https://www.skype.com/people/inogic)

Twitter: @inogic