



inogic

User Manual

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Introduction

SharePoint Security Sync is a comprehensive solution for integrating Microsoft Dynamics 365 and Power Apps with SharePoint for document management. It provides seamless integration between two systems and syncs security privileges from Dynamics 365 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/Email/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
- 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 8.2 & above, Dataverse (Power Apps).

Deployment: Online

SharePoint: Online

Disclaimer: *In the process of synchronizing security between 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.*

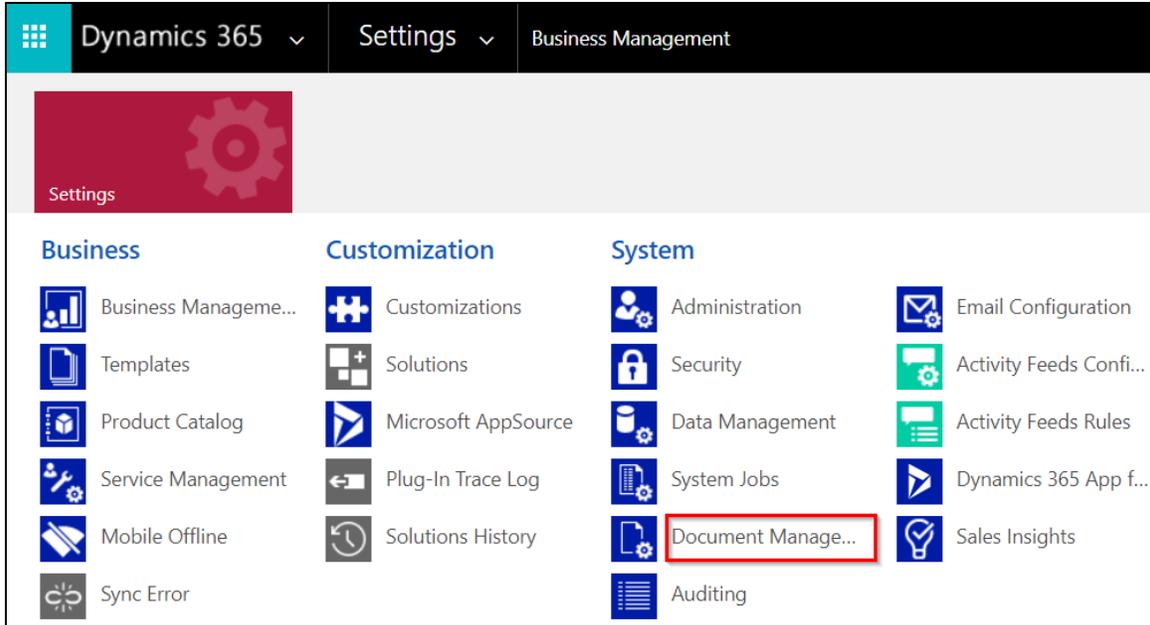
Prerequisites

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

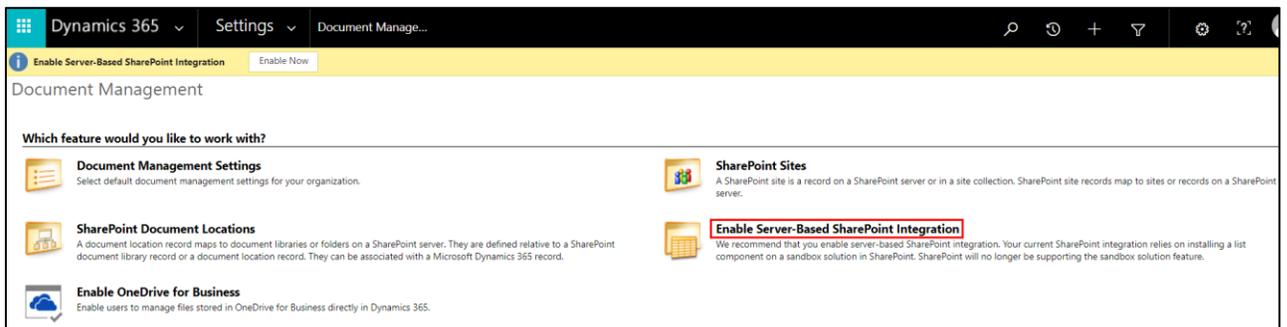
To do this, follow the steps given below:

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

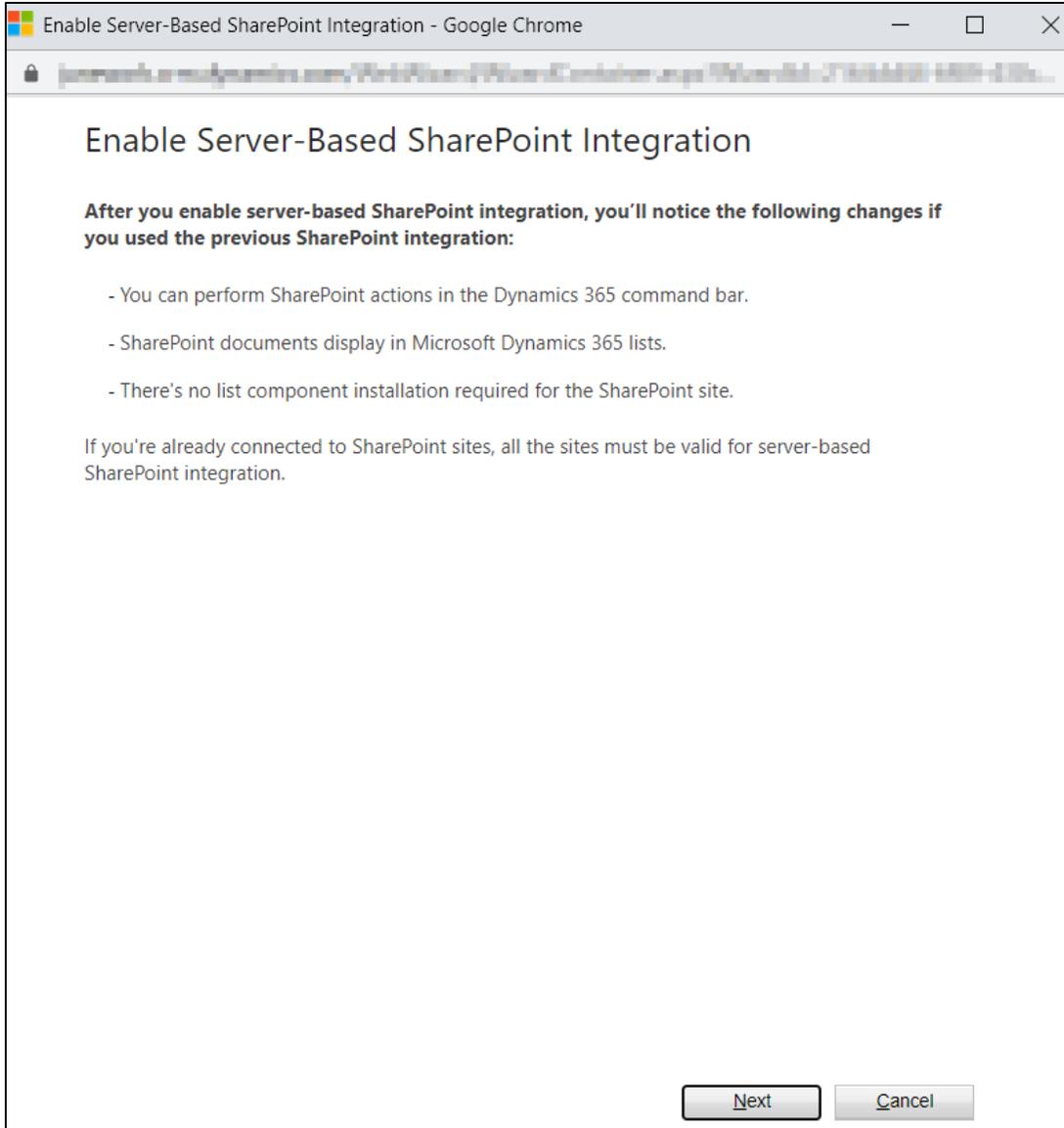
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2) Go to 'Enable Sever-Based Sharepoint Integration'.



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

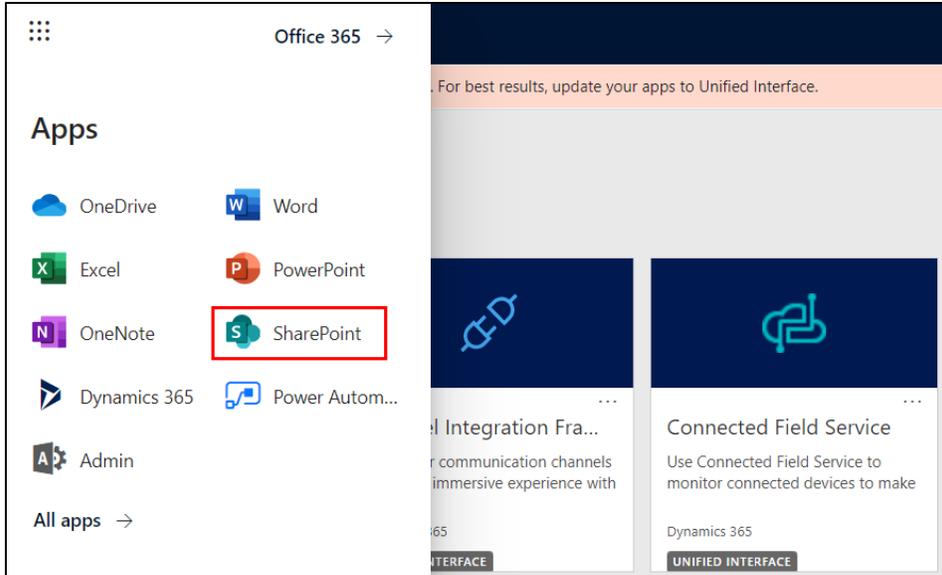
No additional setup requirements are required for connecting Dynamics 365 Online to SharePoint Online.

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

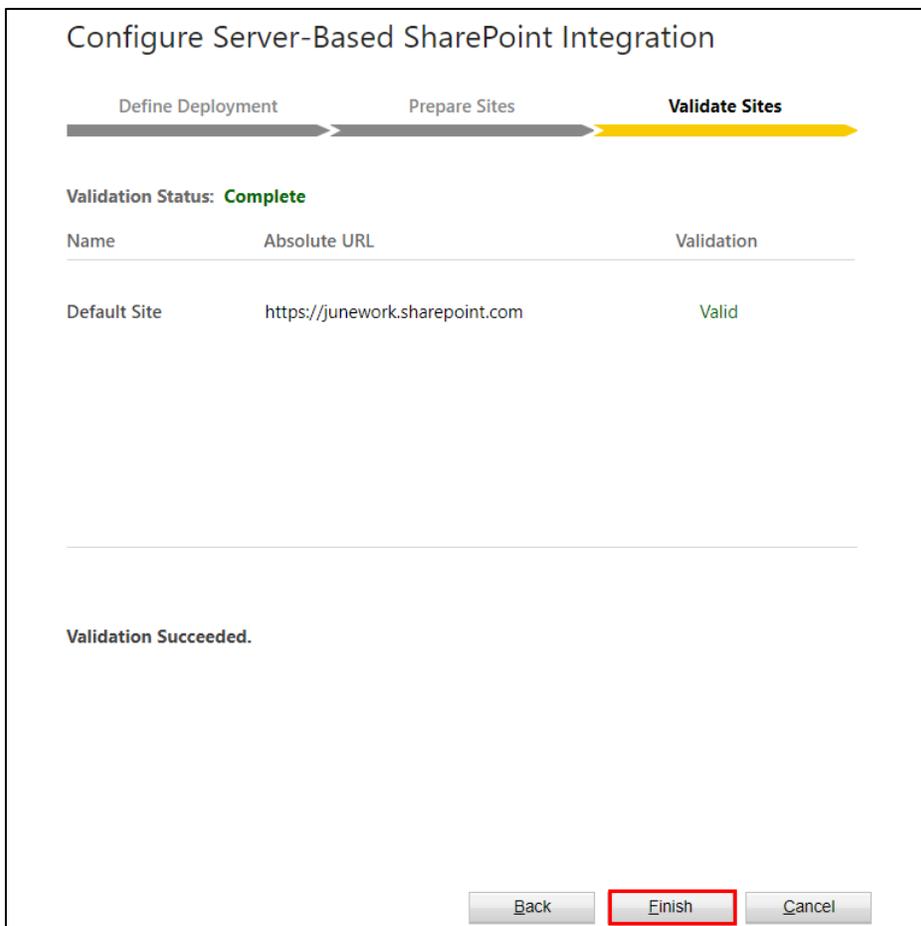
URL

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

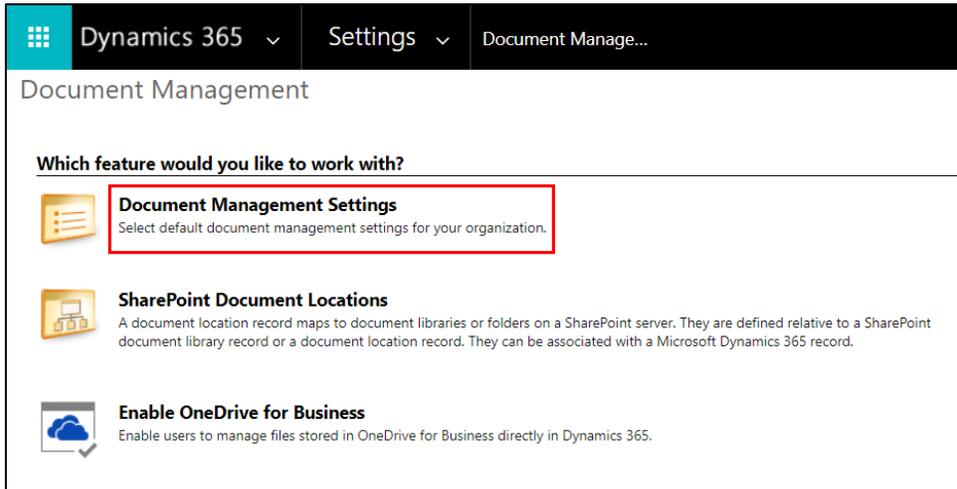
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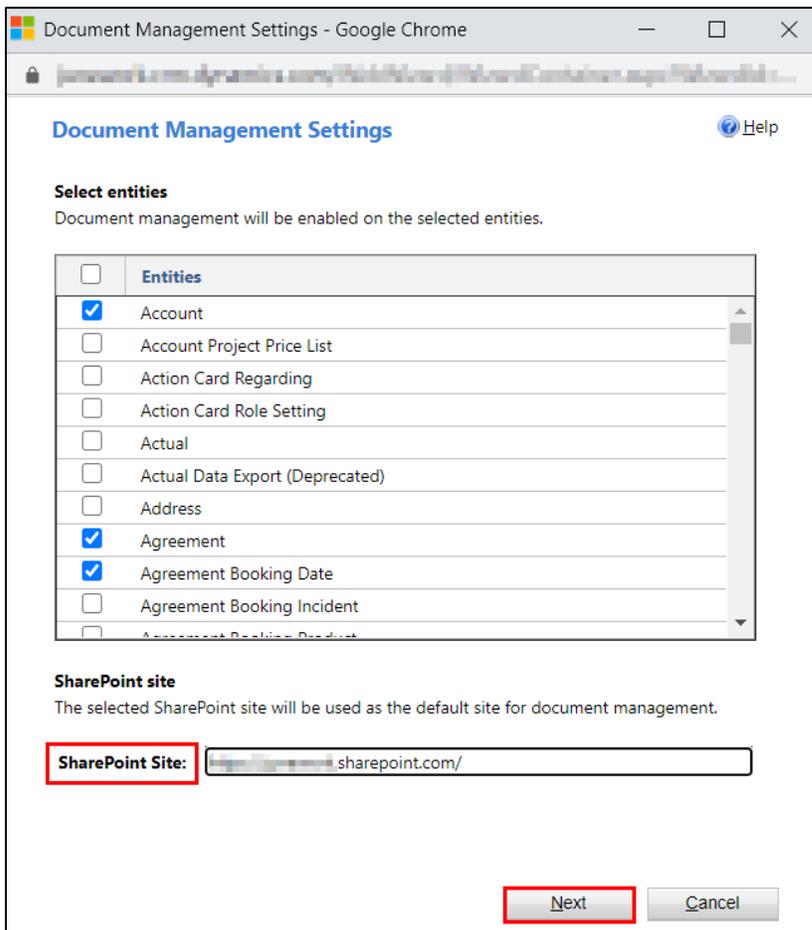
7) Once the site is validated, click on **Finish**.



- 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](#)

<https://junework.sharepoint.com/> 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.

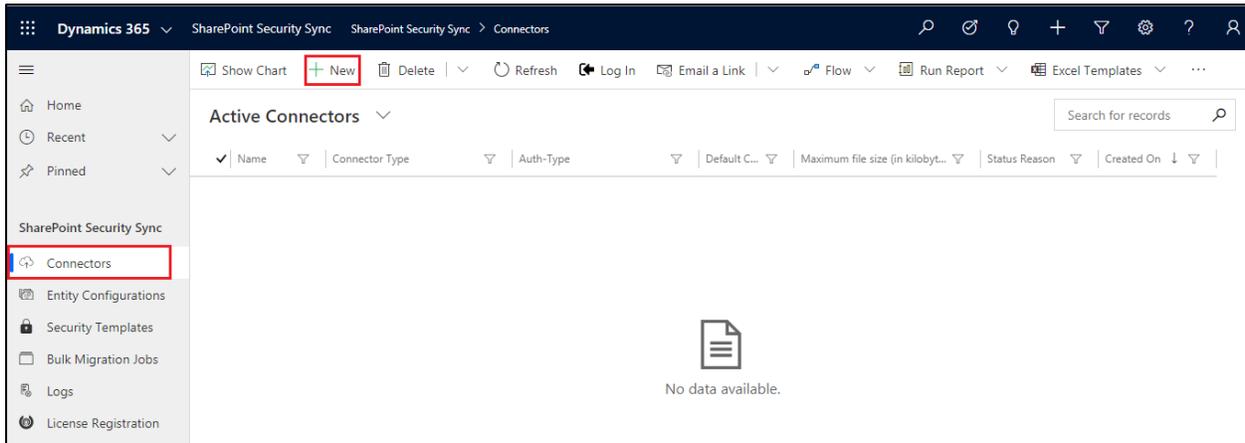
Users --> More than 300

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.

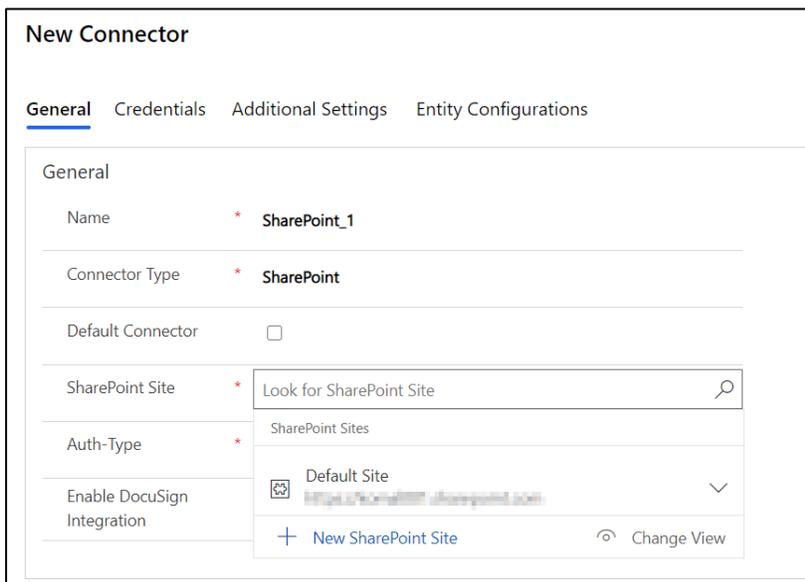
To achieve this, navigate to **SharePoint Security Sync** App and then click **'Connectors'** Entity. Next, click **'New'** to create a new **'Connector.'**



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 fields are: 'Name' (required) with the value 'SharePoint_1'; 'Connector Type' (required) with the value 'SharePoint'; 'Default Connector' (checkbox) which is unchecked; 'SharePoint Site' (required) with a search box containing 'Look for SharePoint Site'; 'Auth-Type' (required) with a dropdown menu showing 'Default Site' and a URL 'https://contoso.sharepoint.com'; and 'Enable DocuSign Integration' (checkbox) which is checked. There is a '+ New SharePoint Site' button and a 'Change View' button at the bottom.

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

- c) **Enable DocuSign Integration:** Enable the checkbox to make use of DocuSign features.

Note: To use DocuSign feature from Attach2Dynamics UI it is necessary to install and configure DocuSign solution in Dynamics 365 CRM.

New Connector

General | Credentials | Additional Settings | Entity Configurations

General

Name	*	Sharepoint_1
Connector Type	*	SharePoint
Default Connector		<input type="checkbox"/>
SharePoint Site	*	 Default Site
Auth-Type	*	---
Enable DocuSign Integration		<input checked="" type="checkbox"/>

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

New Connector

General Credentials Additional Settings Entity Configurations

General

Name * SharePoint_1

Connector Type * SharePoint

Default Connector

SharePoint Site * Default Site

Auth-Type * --Select--
--Select--
Credential
App

Enable DocuSign Integration

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.

New Connector

General Credentials Additional Settings Entity Configurations

Id * [REDACTED]

Password/Secret * ZZZZZ 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.

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New Connector

Sam Richard Owner | Unauthenticated Status Reason

General **Credentials** Additional Settings Entity Configurations

Id	*	---
Password/Secret	*	---

Use below as your redirect url
https://a4ddev.crm8.dynamics.com/WebResources/ikl_/Attach2Dynamics/Callback.html

Create Azure Active Directory App
In order to get Id and Secret Key please follow this [blog](#)

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

Connector

Sam Richard Owner | Unauthenticated Status Reason

General **Credentials** Additional Settings Entity Configurations Related

Id	*	ef6166ad-617d-4904-a6ae-c44b058e6c97
Password/Secret	*	ZZZZZ VQMVE LAUGW EHDTH NQBOV UDJCA H...

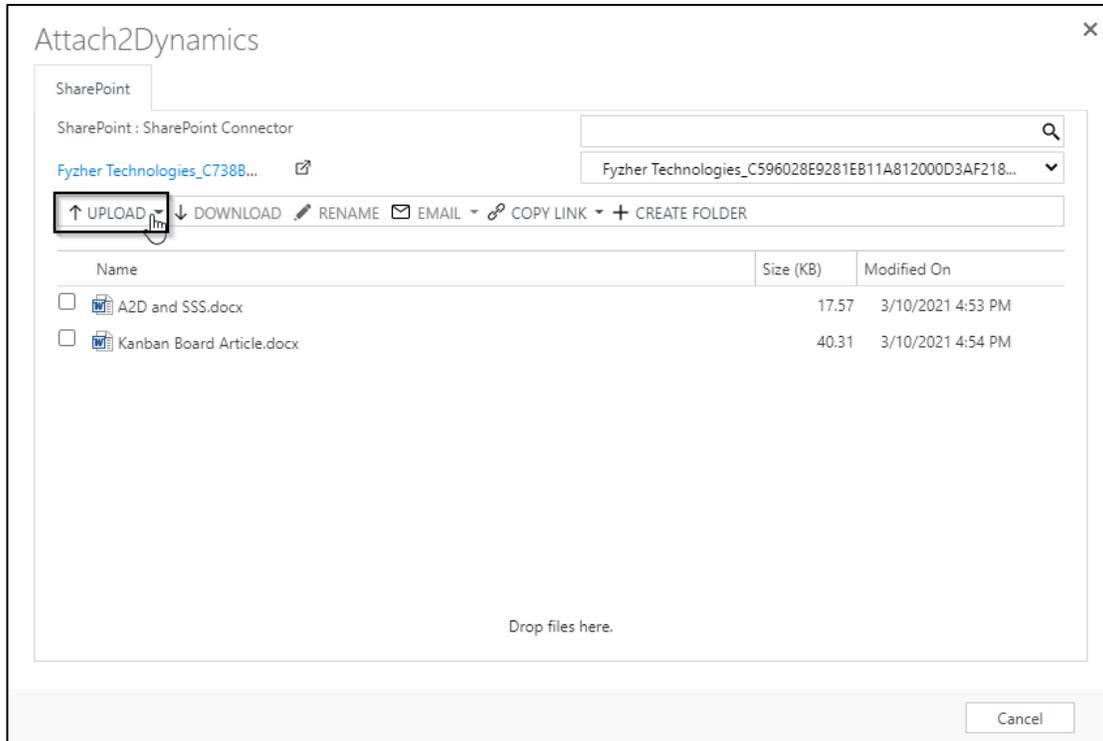
Use below as your redirect url
https://a4ddev.crm8.dynamics.com/WebResources/ikl_/Attach2Dynamics/Callback.html

Create Azure Active Directory App
In order to get Id and Secret Key please follow this [blog](#)

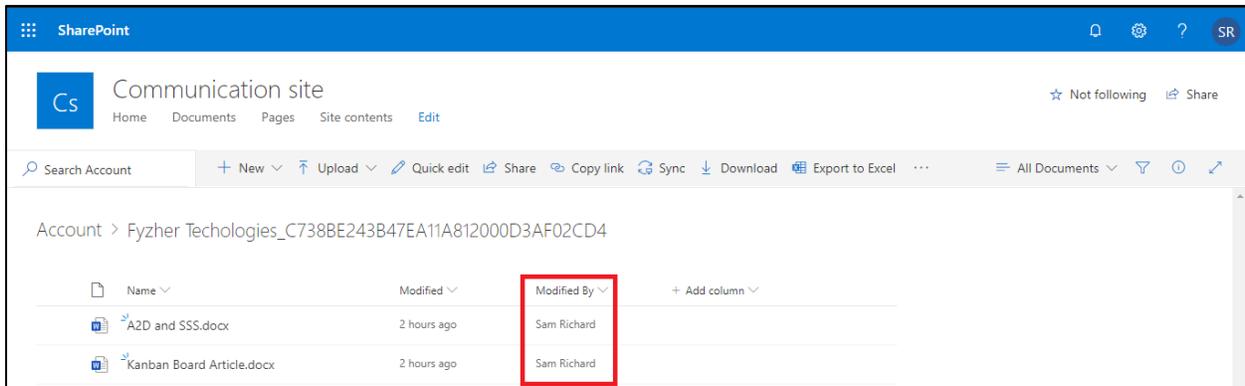
Now if any logged in user uploads or performs any attachment action on files in SharePoint, their name will appear for the action.

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

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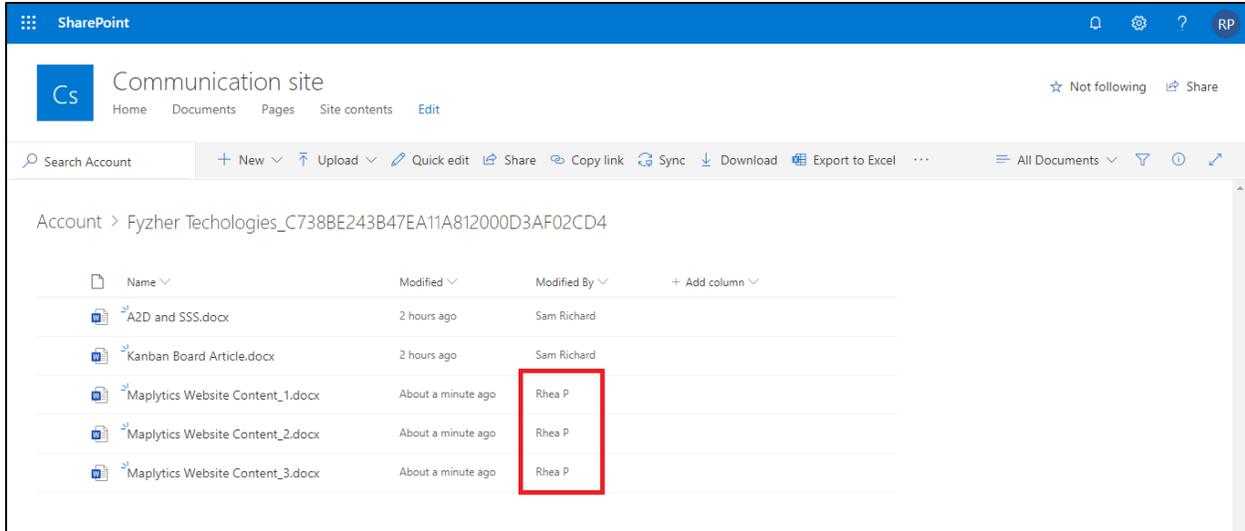


Here the name of the admin appears when they are logged in and have uploaded the file.



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

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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.



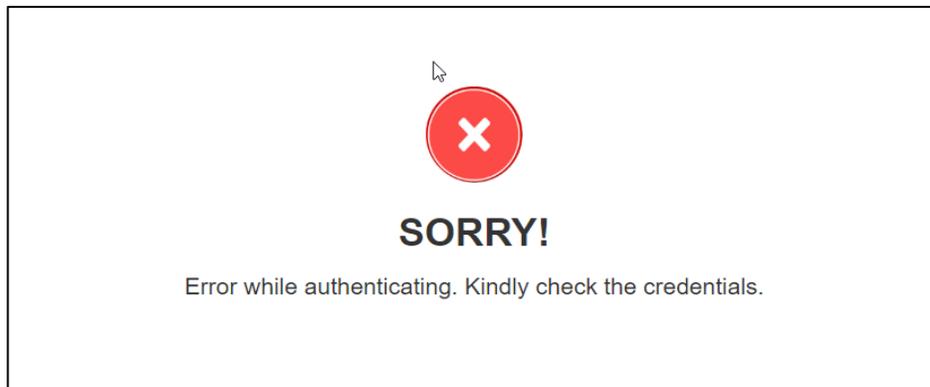
After the Connector is Authenticated, create Entity Configuration record.

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

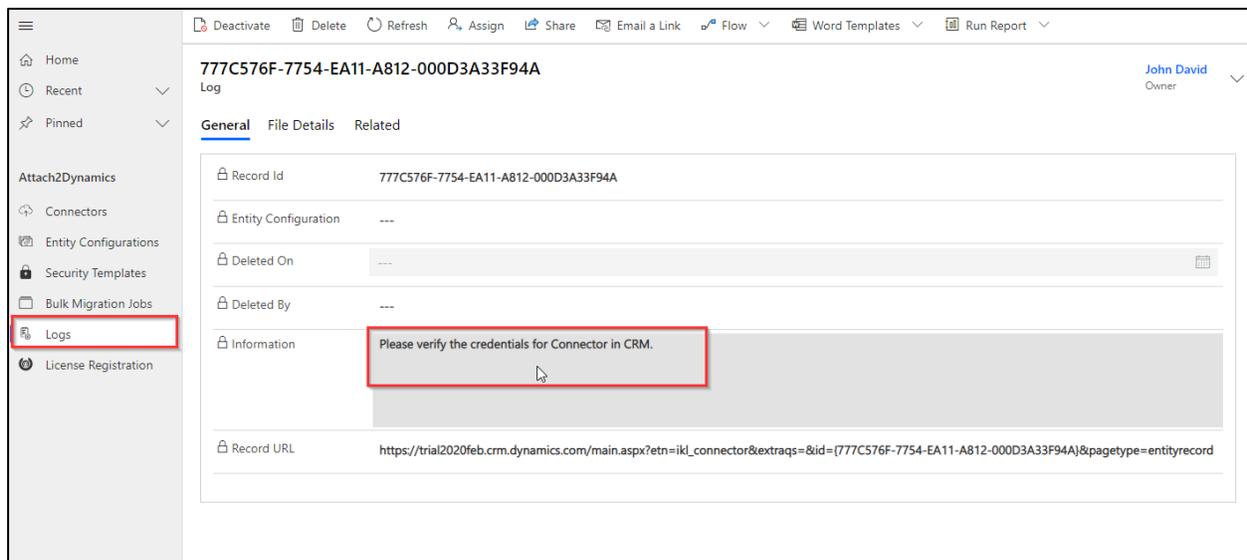
SharePoint Security Sync – User Manual



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



And to see the what exactly the error is, navigate to **'Logs Entity'**, check the error and retry the authentication.

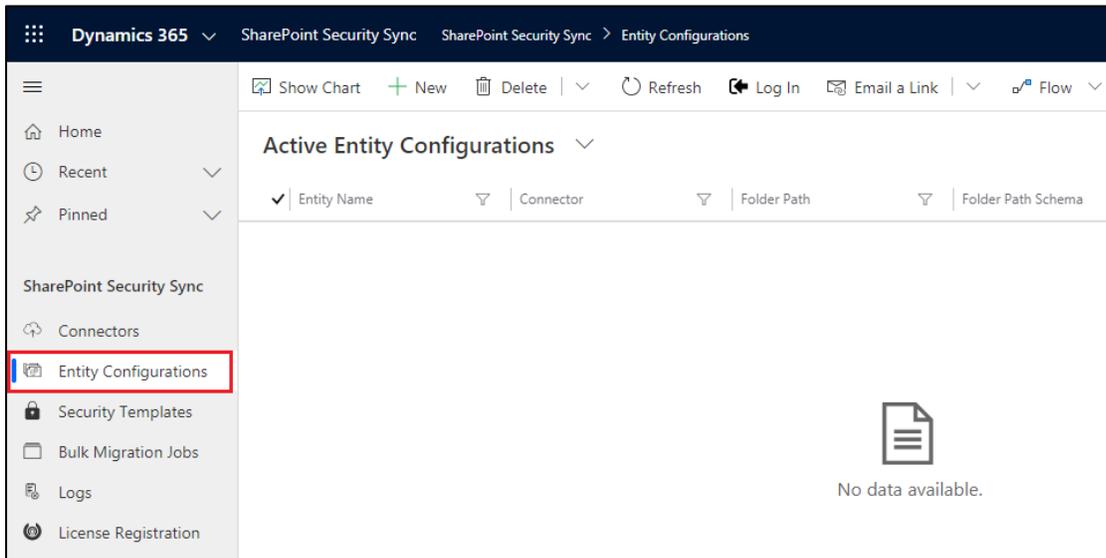


The screenshot shows the SharePoint Security Sync interface. On the left is a navigation pane with a search icon and a list of items: Home, Recent, Pinned, Attach2Dynamics, Connectors, Entity Configurations, Security Templates, Bulk Migration Jobs, Logs (highlighted with a red box), and License Registration. The main content area shows a log entry for record ID 777C576F-7754-EA11-A812-000D3A33F94A. The entry is titled "Log" and has "John David" as the owner. The "General" tab is selected, showing fields for Record Id, Entity Configuration, Deleted On, Deleted By, and Information. The "Information" field contains the message "Please verify the credentials for Connector in CRM." which is highlighted with a red box. The "Record URL" field shows the full URL: https://trial2020feb.crm.dynamics.com/main.aspx?etn=ikl_connector&extraqs=&id=(777C576F-7754-EA11-A812-000D3A33F94A)&pagetype=entityrecord.

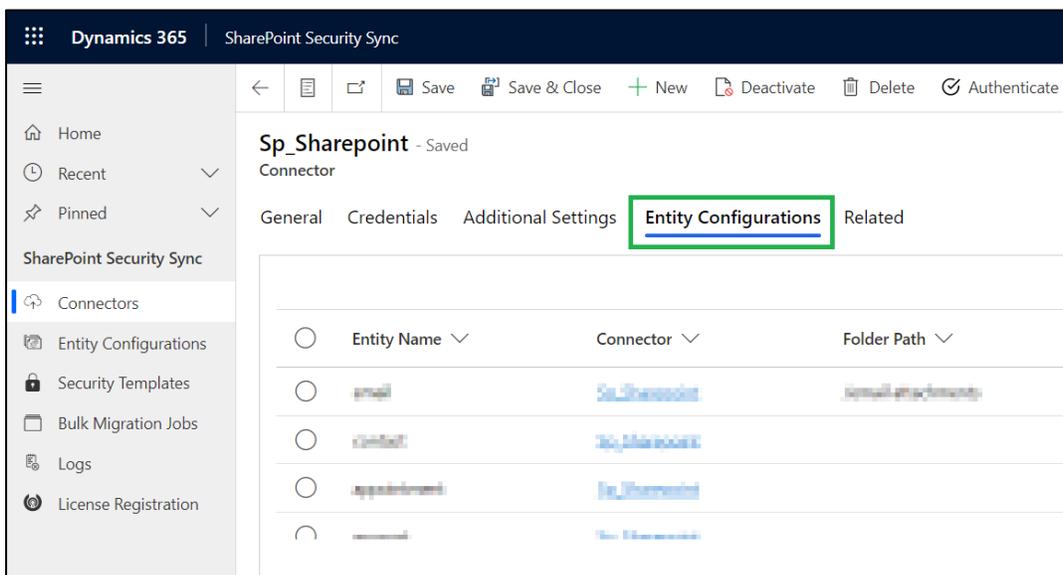
Entity Configuration

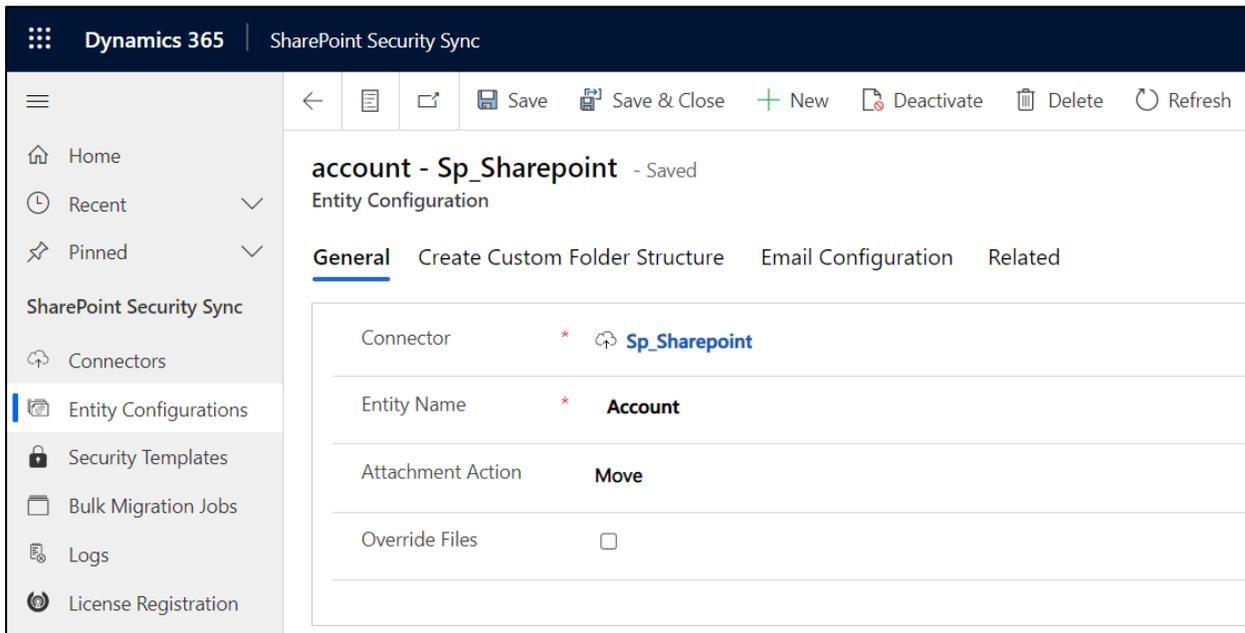
Disclaimer: In order to synchronize security for {EntityName} in SharePoint, we'd have to break the inheritance of permission for the record folder within the respective Document Library in SharePoint. If ever you wish to restore the original state, it needs to be done manually and **Inogic does not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

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



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.
 - ii) **Move:** If you Select **Move**, the attachment will be moved/migrated 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 be 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 number appended is created 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.

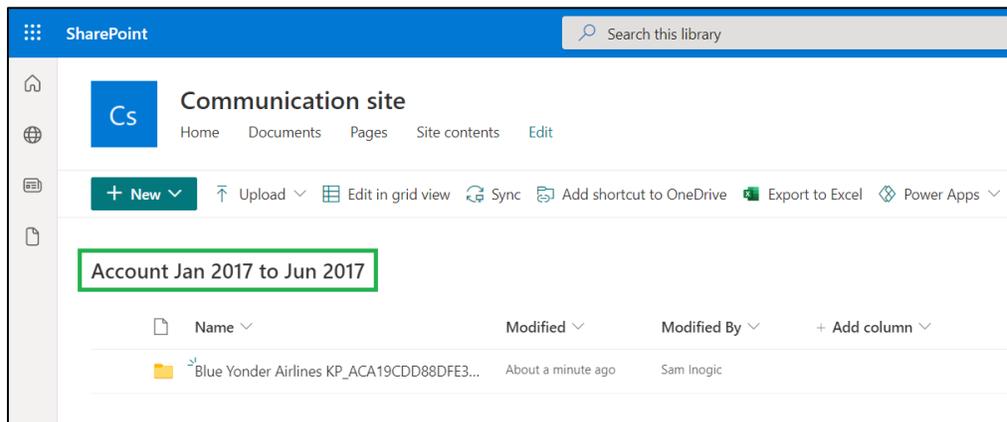
For example, suppose if user has set **‘Period type’** to **‘X Month’** and **‘Duration’** to **‘6’**. Now based on this setting a half yearly document library will be created in SharePoint for whichever record created for that particular period.

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.

account - Sp_Sharepoint - Saved
Entity Configuration

General Create Custom Folder Structure Email Configuration Related

Create Library Structure

Library structure	By Starting character
Document Library Format *	{primarycontactid}

- **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.

account - Sp_Sharepoint - Unsaved
Entity Configuration

General Create Custom Folder Structure Email Configuration Related

Create Library Structure

Library structure	Custom
Document Library Format *	{preferredcontactmethodcode}

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.

account - Sp_Sharepoint - Saved
Entity Configuration

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

Create Library Structure

Library structure **By Period**

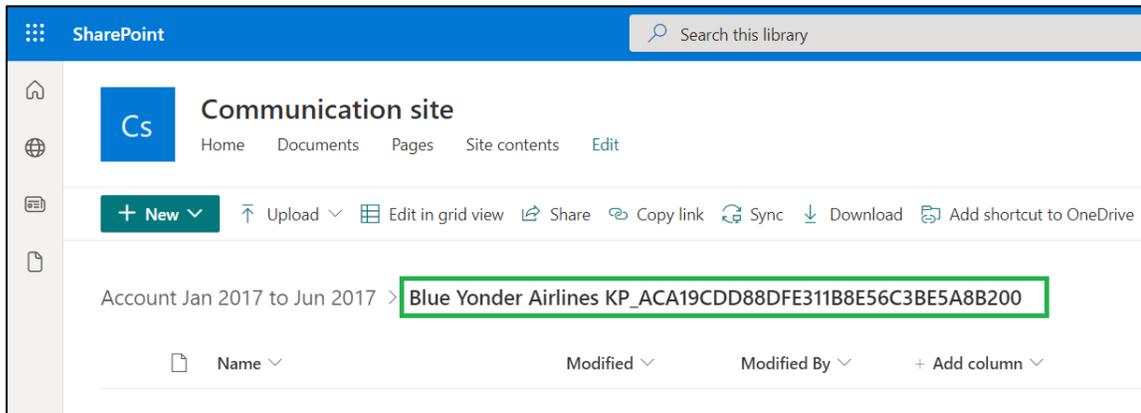
Period type * X Month

Duration * 6

Select date Format * MMM yyyy

Create Record Folder Structure

Folder Format (name) KP



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:

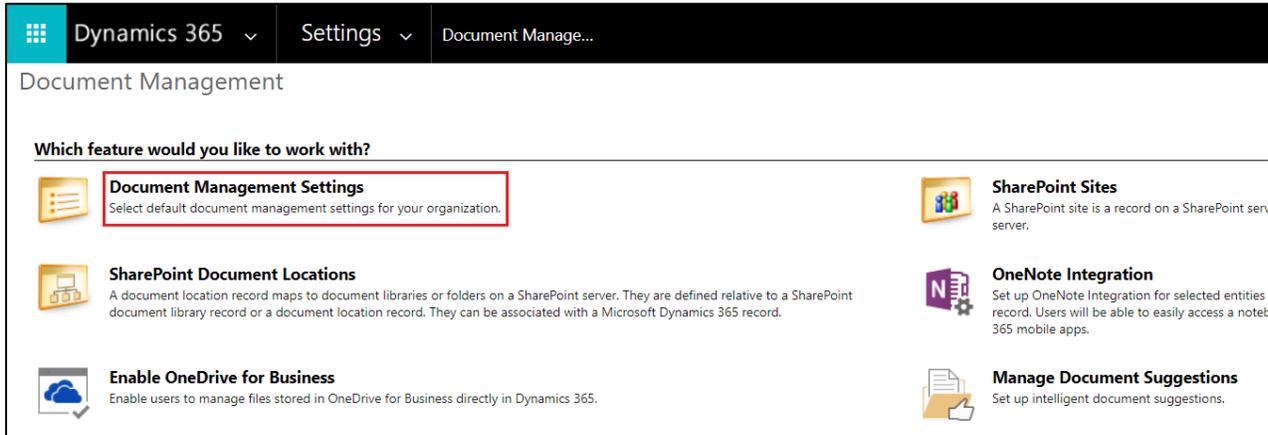
- 1) To use SharePoint Security Sync functionalities on an **Entity** it is mandatory that you create an **Entity Configuration** record for the same.
- 2) Attachment Actions can be enabled only for one entity with one Connector.
- 3) Connector and Entity Configuration are editable if user has SharePoint 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

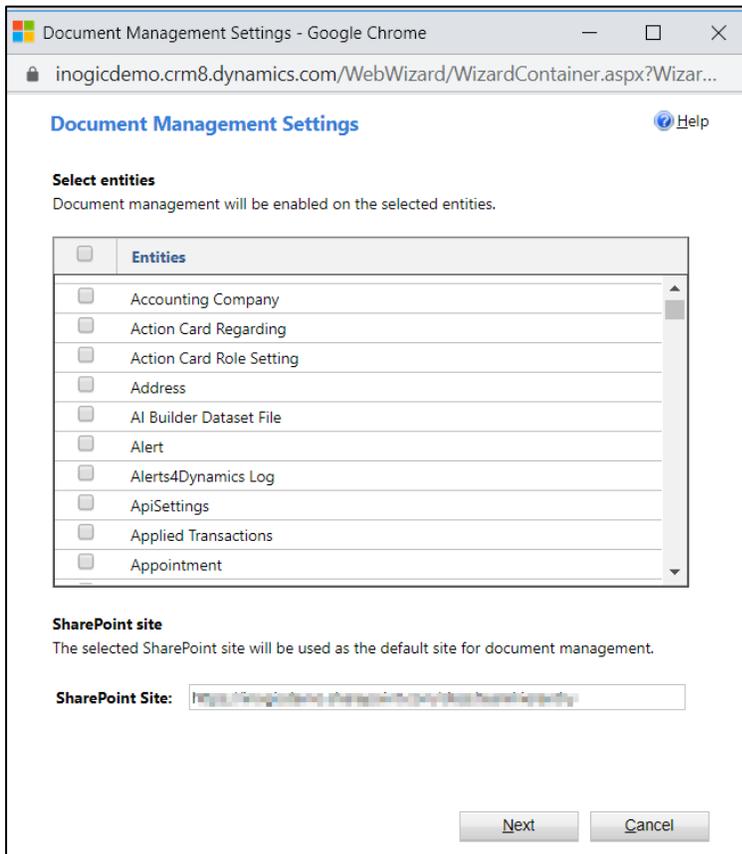
Attachments/Documents of Dynamics 365 CRM records can be stored in SharePoint sites on the basis of hierarchy.

To achieve this, follow the steps given below:

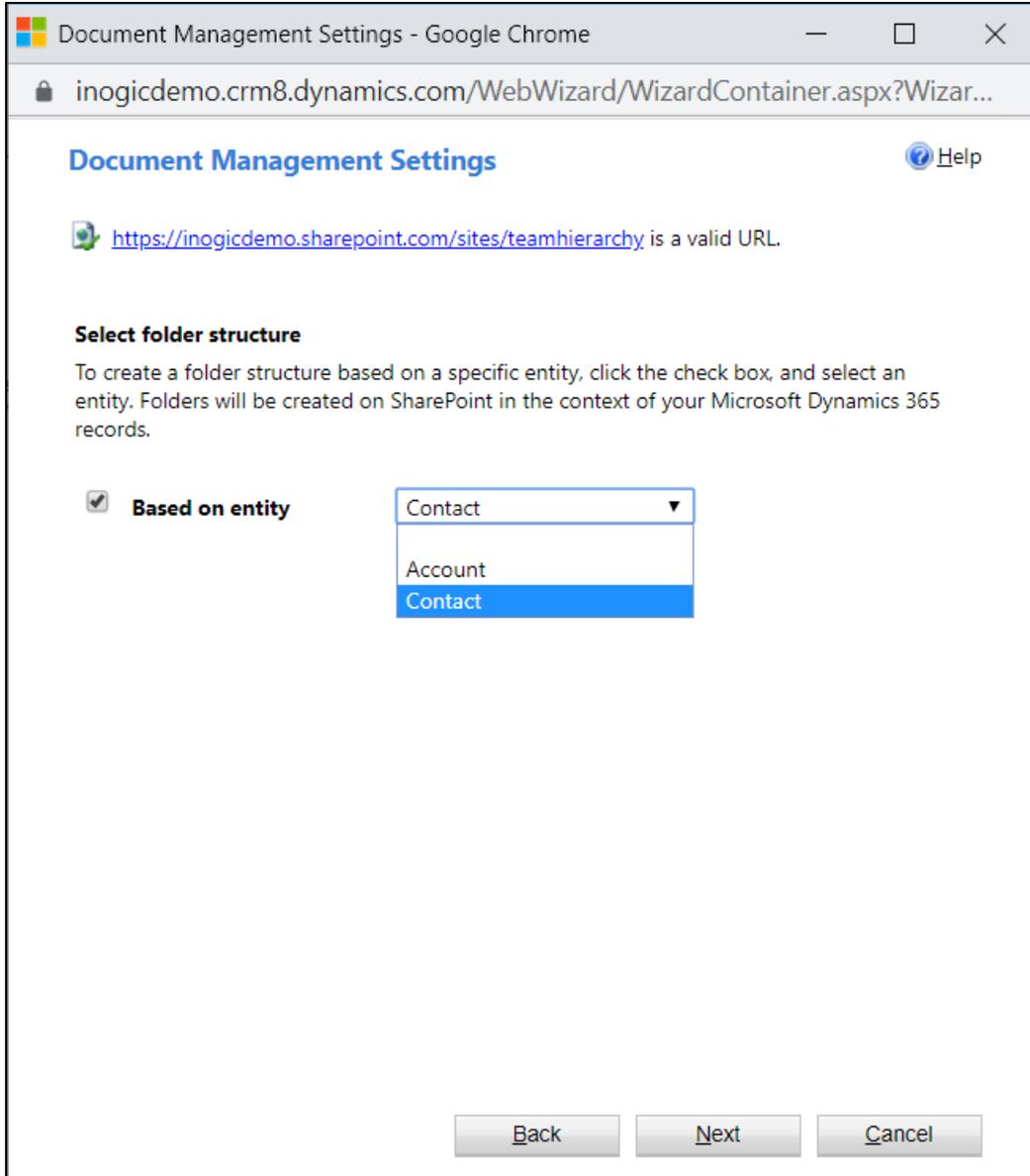
- 1) Go to Advanced Settings → Settings → Document Management Settings.



- 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.

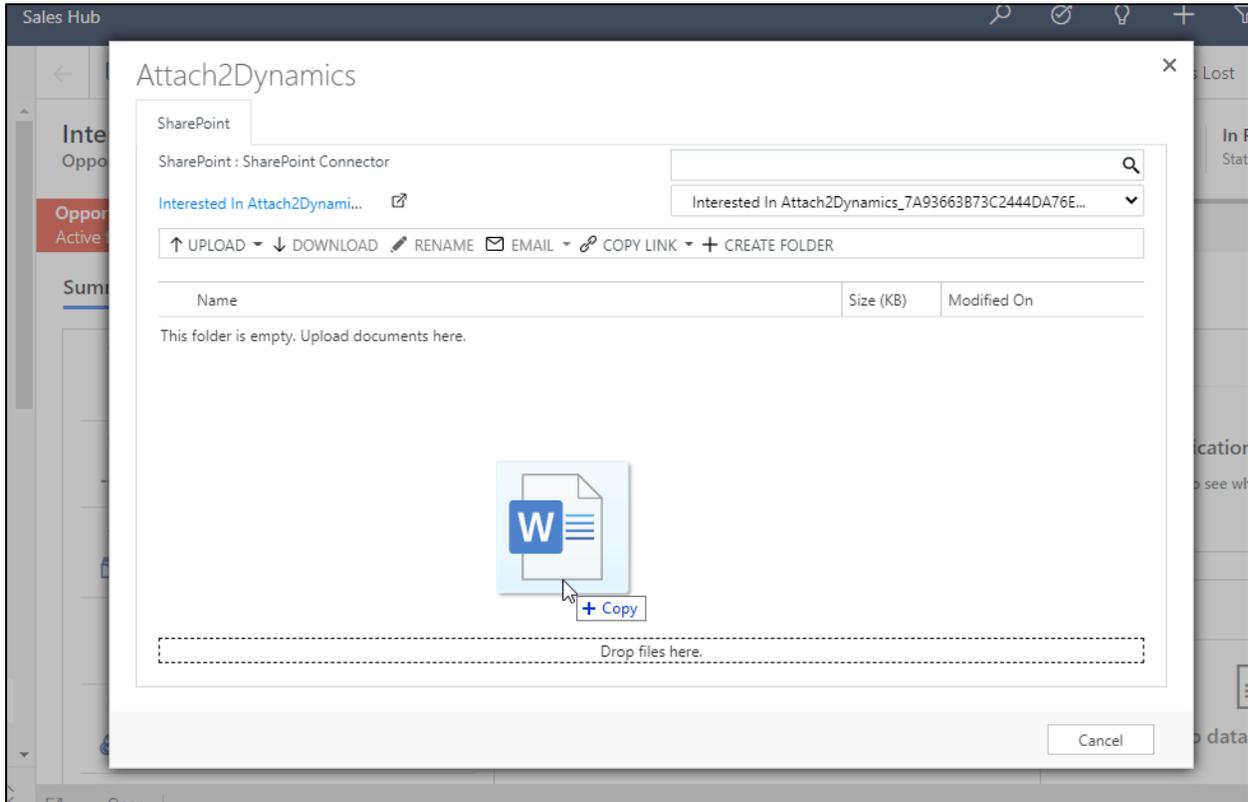


4) Next, go to Entity Configurations → Click on New.

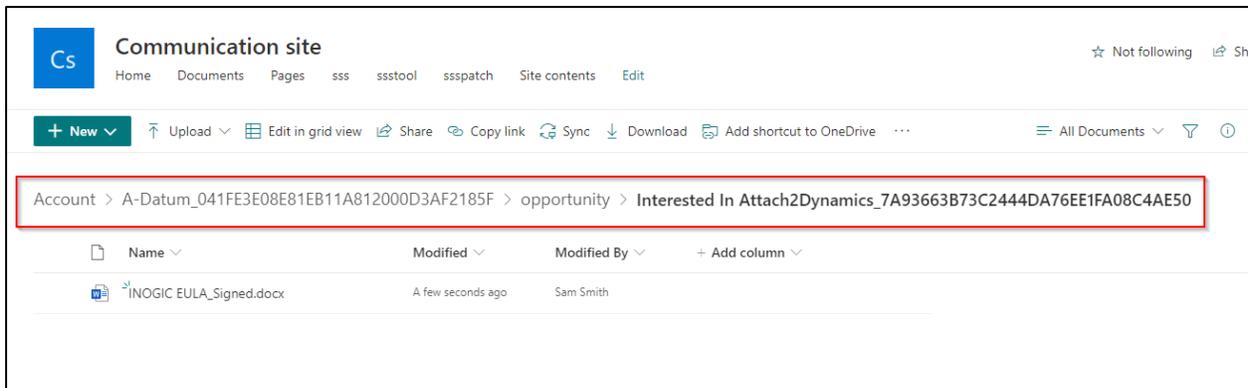
5) Populate the following fields → Click on Save.

- 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.

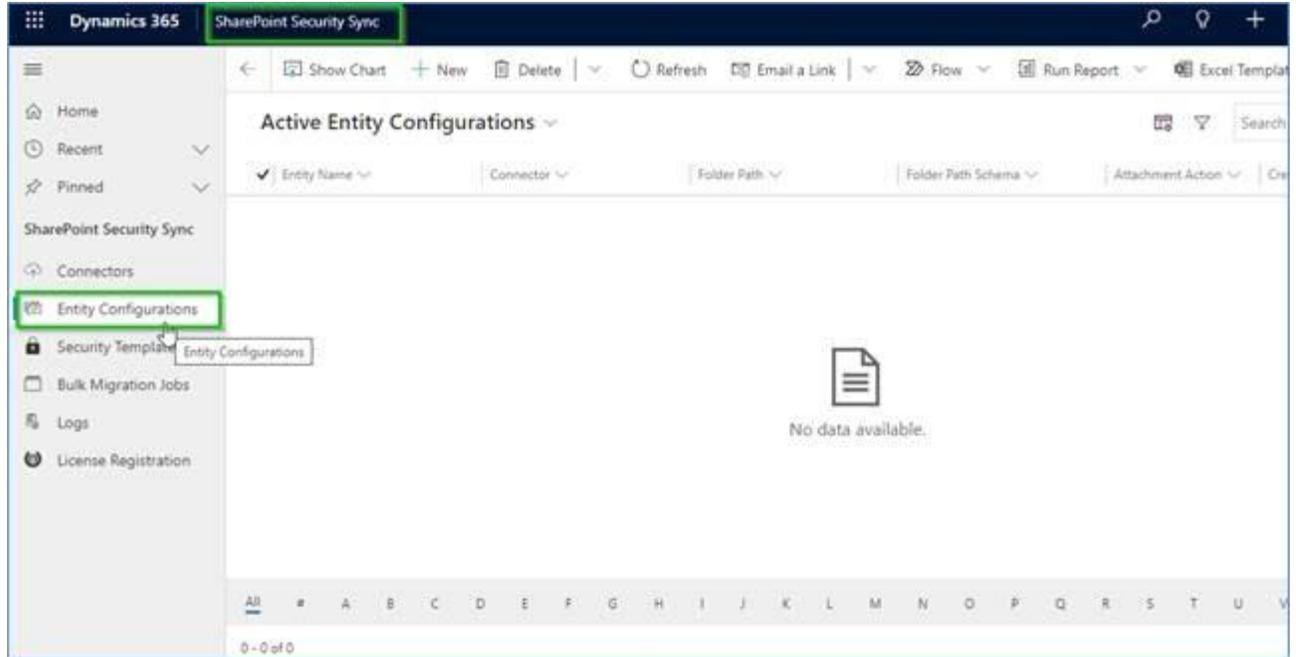


Activity Entity Configuration

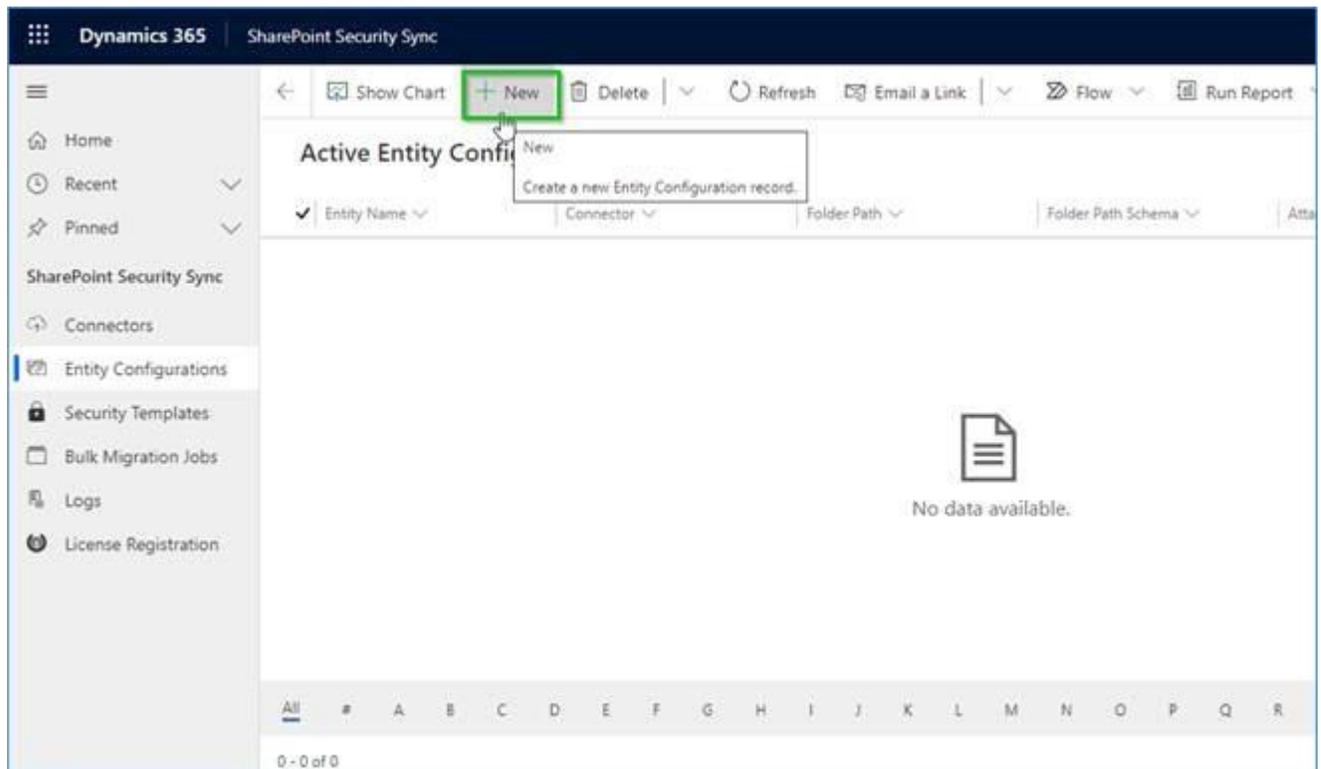
To create entity configuration for Activity Entities, follow the steps given below:

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

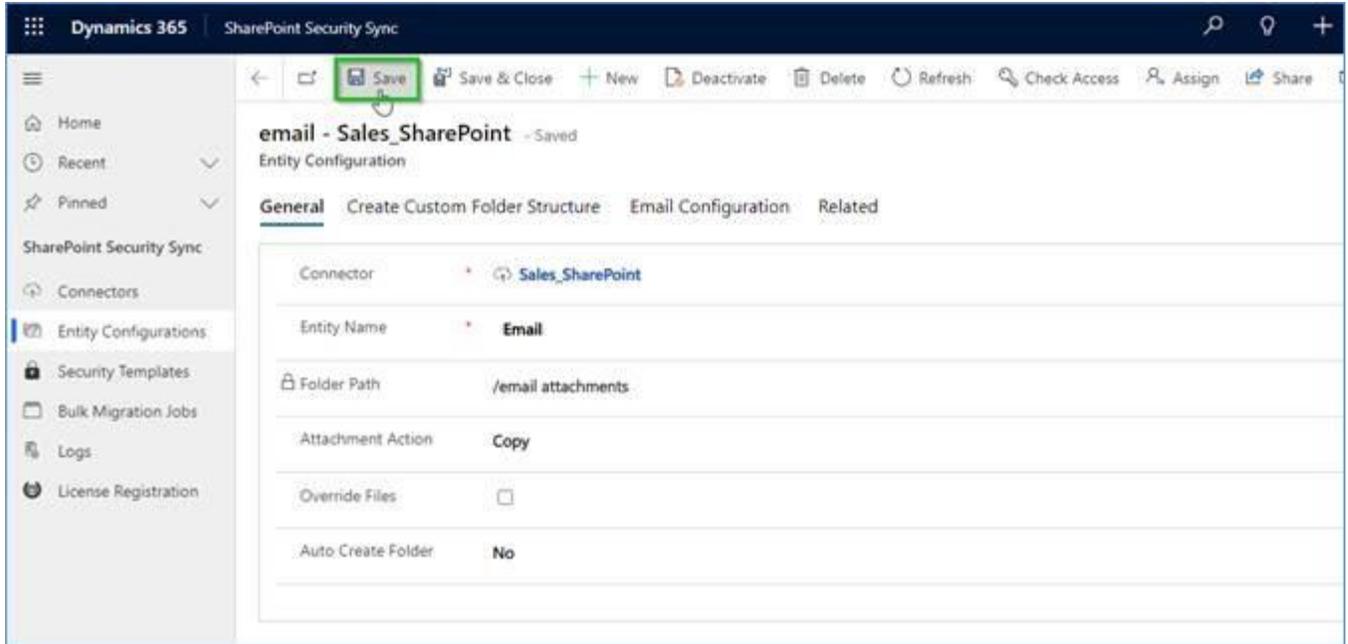
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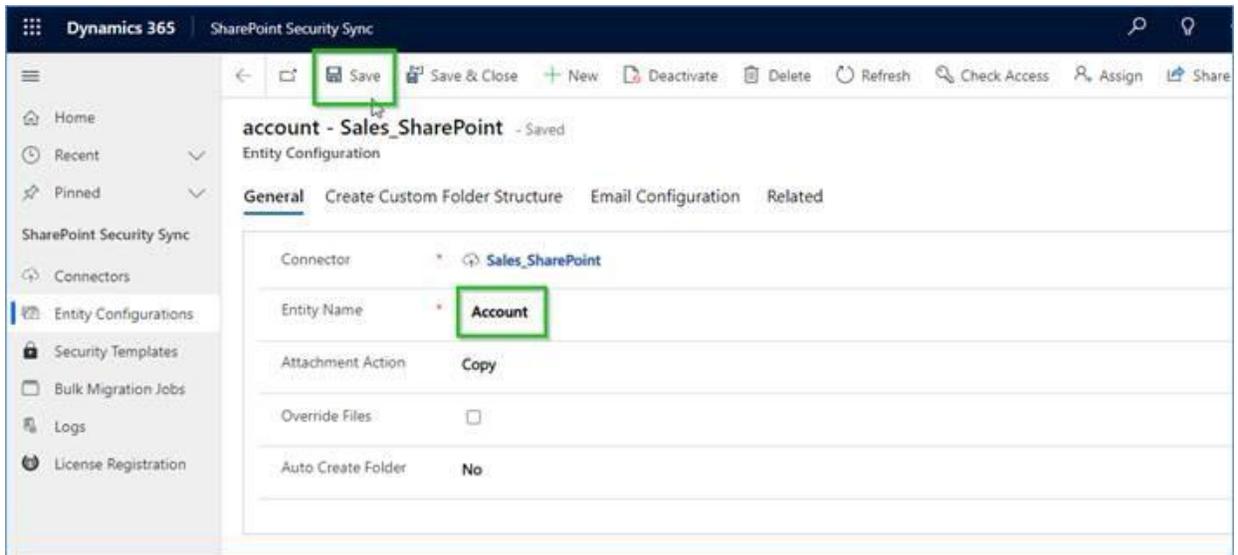
- Click on **+New**.



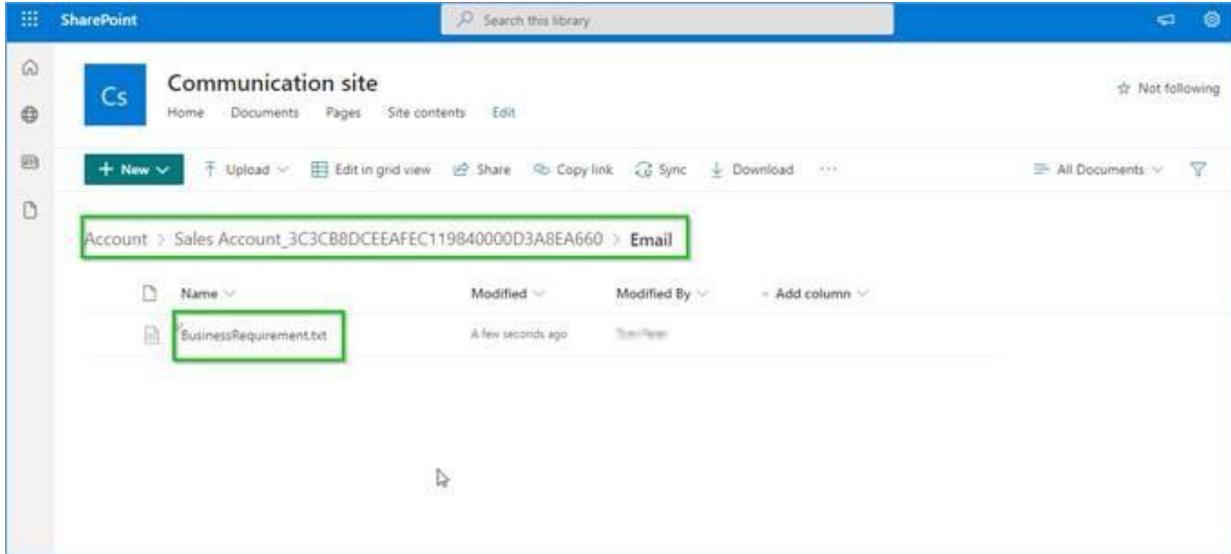
- Enter the required details to create Entity Configuration for **Email** --> Click on **Save**.



- For example - 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:



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

Security Templates

Security Templates Entity enables to control access given to the users over various features of Attach2Dynamics 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 * ---

Connector * ---

Users

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.

Access Level 1
Security Template

Sam P
Owner

General Permissions Related

Name * Access Level 1

Connector * SharePoint_1

Users

Full Name	Site	Busi
<input checked="" type="checkbox"/> Sam P	---	cao

2. Permissions

Next tab is **Permissions** which comprises of all the Attach2Dynamics features. To provide access to Attach2Dynamics features just enable the checkbox given against each and every feature.

SharePoint security template

Security Template

General **Permissions** Related

All	<input checked="" type="checkbox"/>
Upload File/Folder	<input checked="" type="checkbox"/>
Download Files/Folders	<input checked="" type="checkbox"/>
Create Folder	<input checked="" type="checkbox"/>
Delete Files	<input checked="" type="checkbox"/>
DocuSign	<input checked="" type="checkbox"/>
Rename File/Folder	<input checked="" type="checkbox"/>
View Files	<input checked="" type="checkbox"/>
Copy Link	<input checked="" type="checkbox"/>
Email	<input checked="" type="checkbox"/>

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

Note:

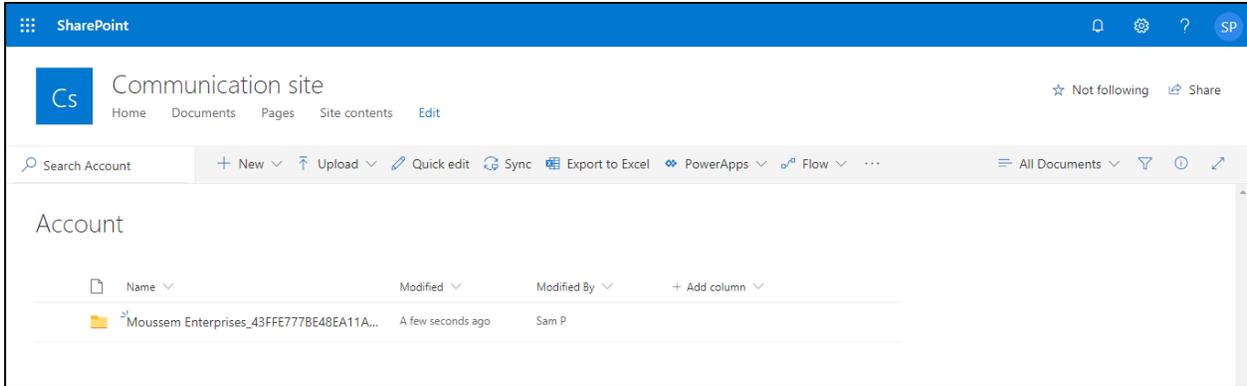
- *If no template is created for a user, then all the features would be enabled except the Delete feature.*
- *For Delete feature a Security Template is must.*

Share and Assign Record

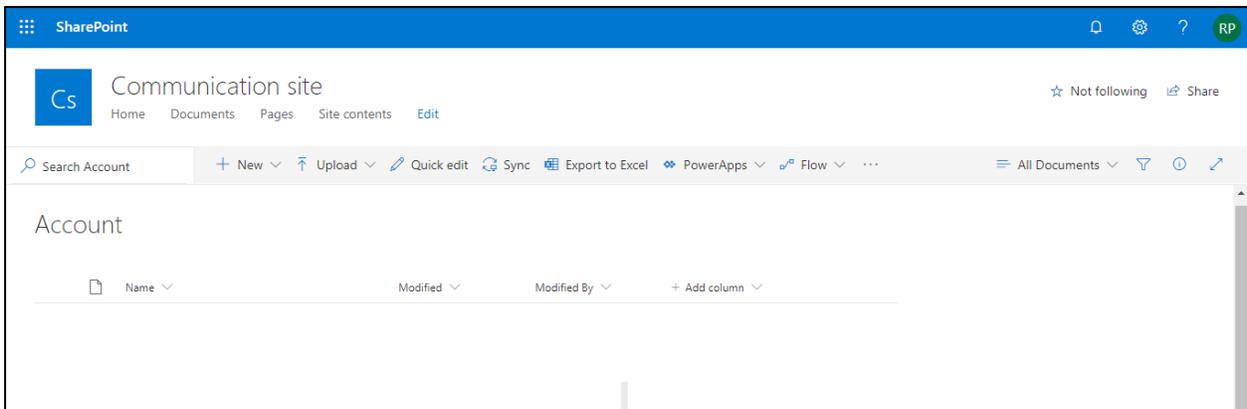
The security role privileges are synced when a record is shared or assigned to another user. For e.g. when a User A (Sam) owns a record and other User B (Rhea) has only user level access, then Rhea won't be able to see the records owned by Sam in SharePoint.

For instance, records visible to Sam are:

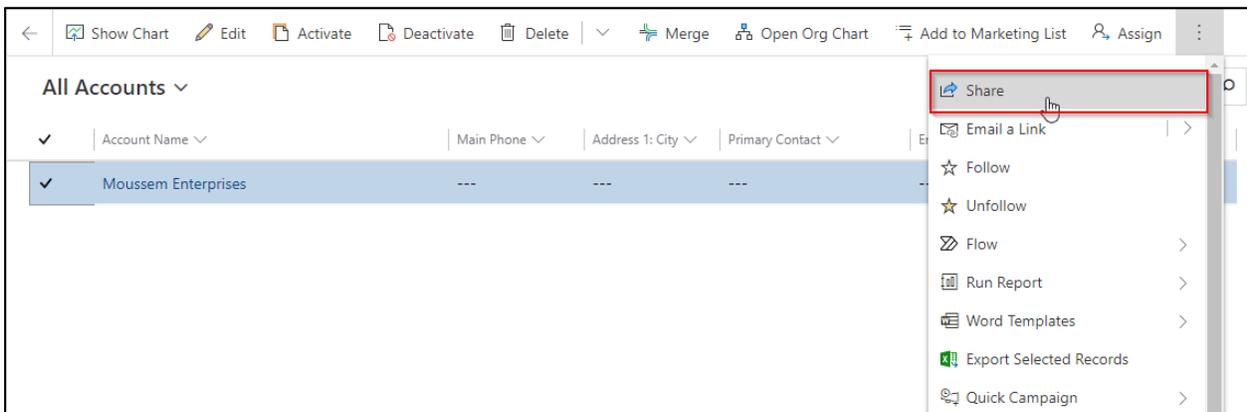
SharePoint Security Sync – User Manual



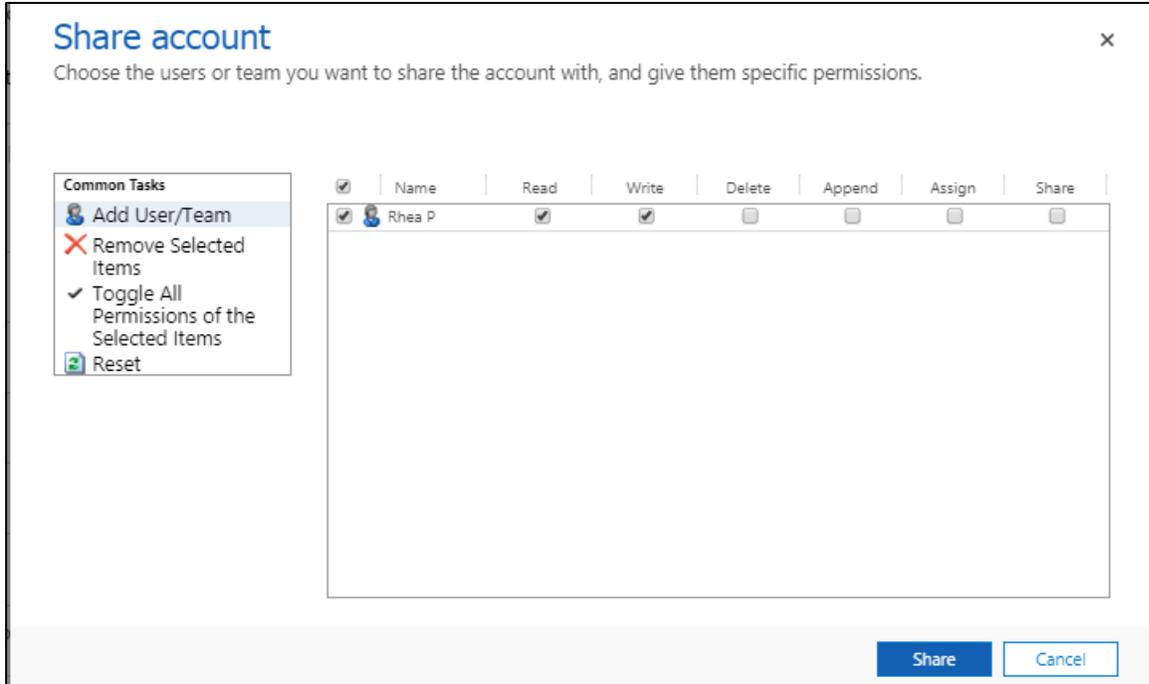
Records visible to Rhea:



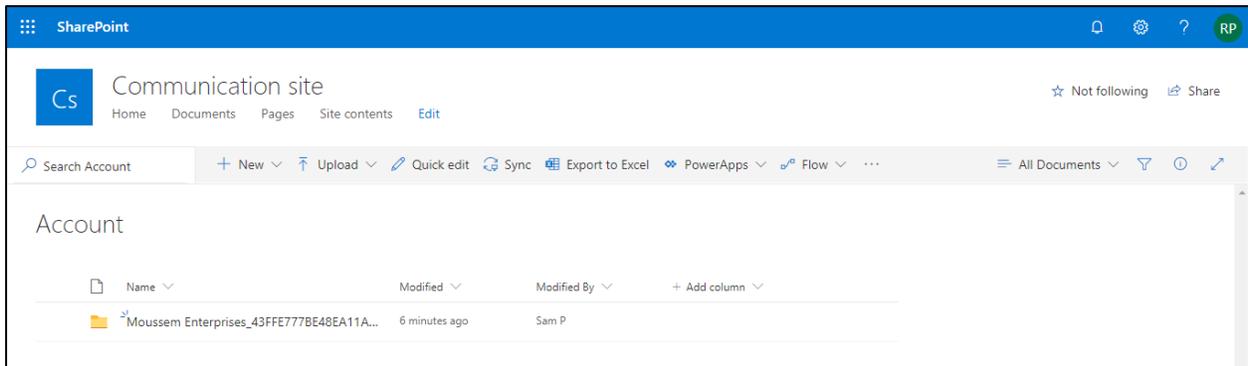
Now Sam shares the record with Rhea.



SharePoint Security Sync – User Manual

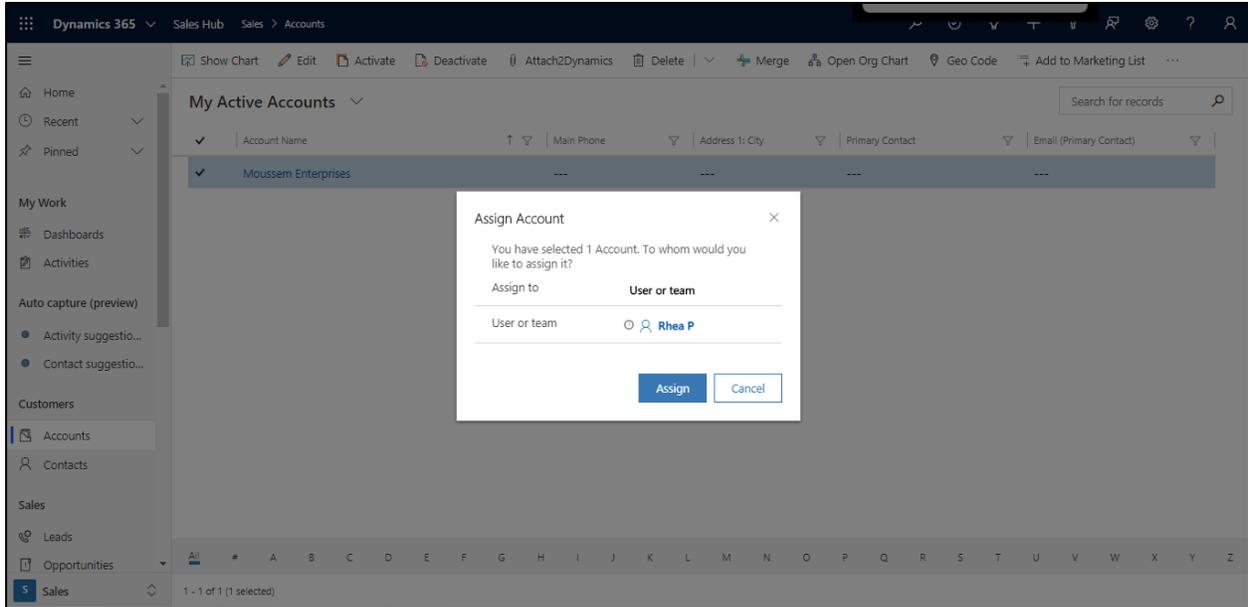


After the records are shared with Rhea she will be able to view the records owned and shared by Sam in SharePoint.



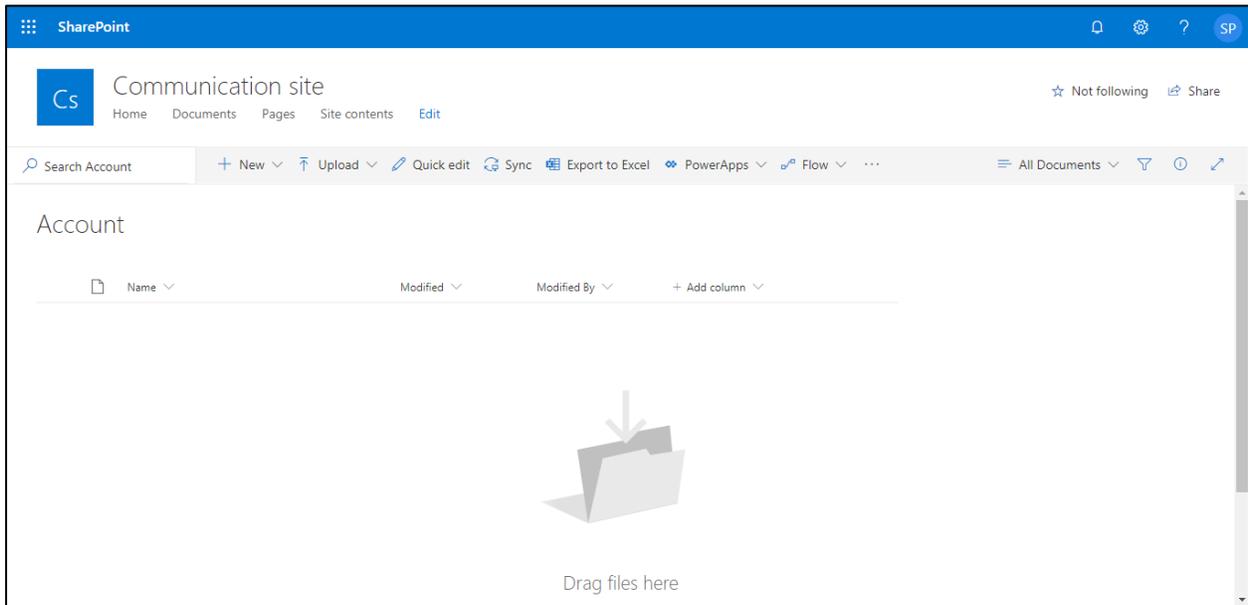
Now due to some business requirement Sam assigns the record to Rhea.

SharePoint Security Sync – User Manual

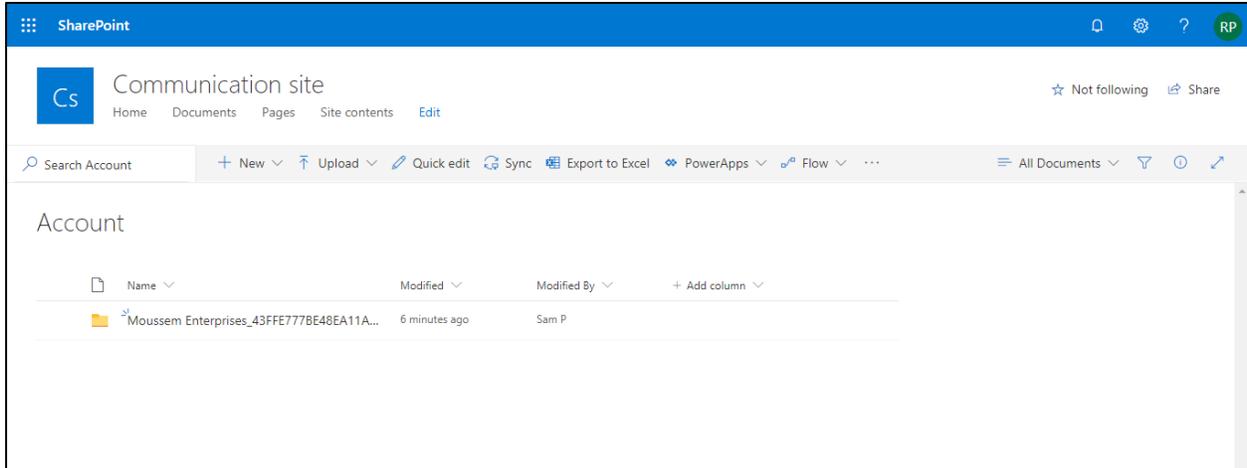


The record will not be visible to Sam anymore and will be assigned and visible to Rhea in SharePoint.

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

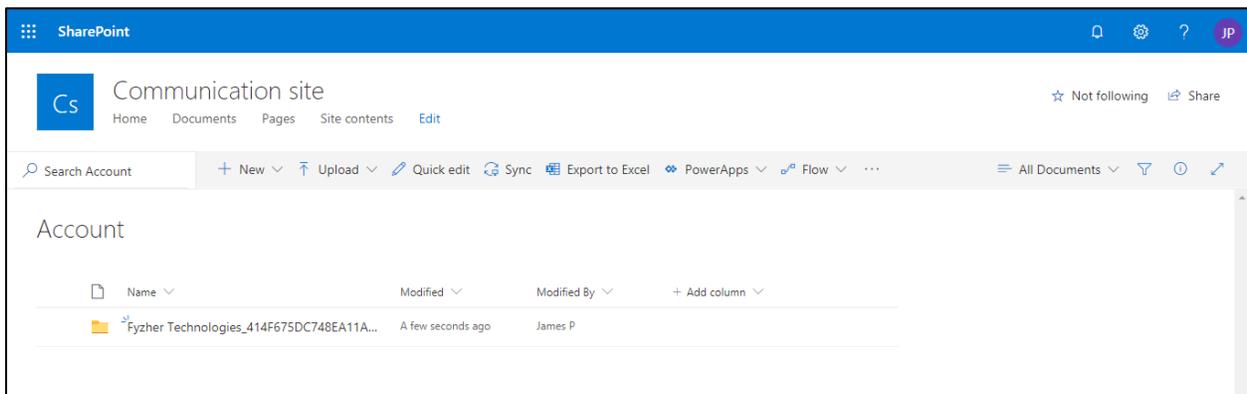
Apart from sharing and assigning records, we can also modify the security roles in Dynamics 365 which will be replicated in SharePoint. To understand this better, we have created two Business Units apart from root business unit that are: Marketing and Sales. Sales is the parent business unit of Marketing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

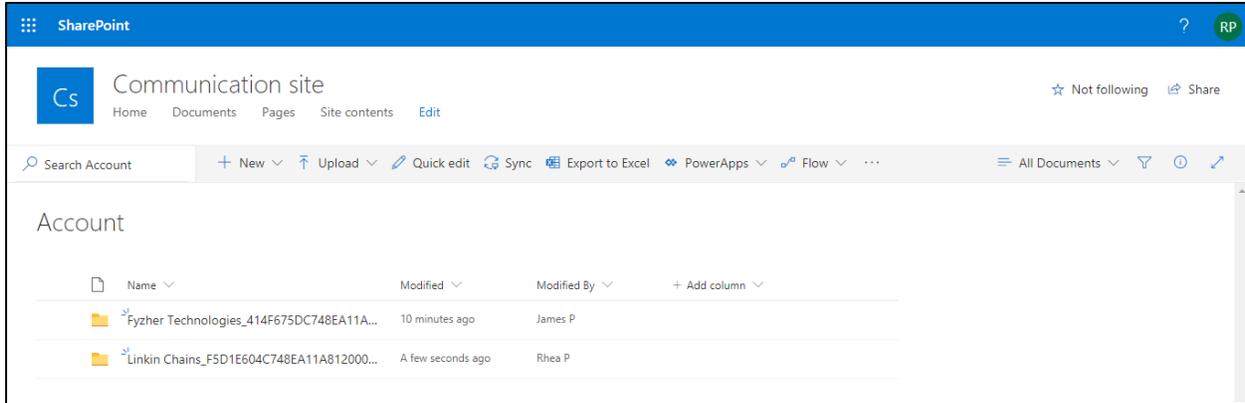
Scenario 1 Visibility:

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

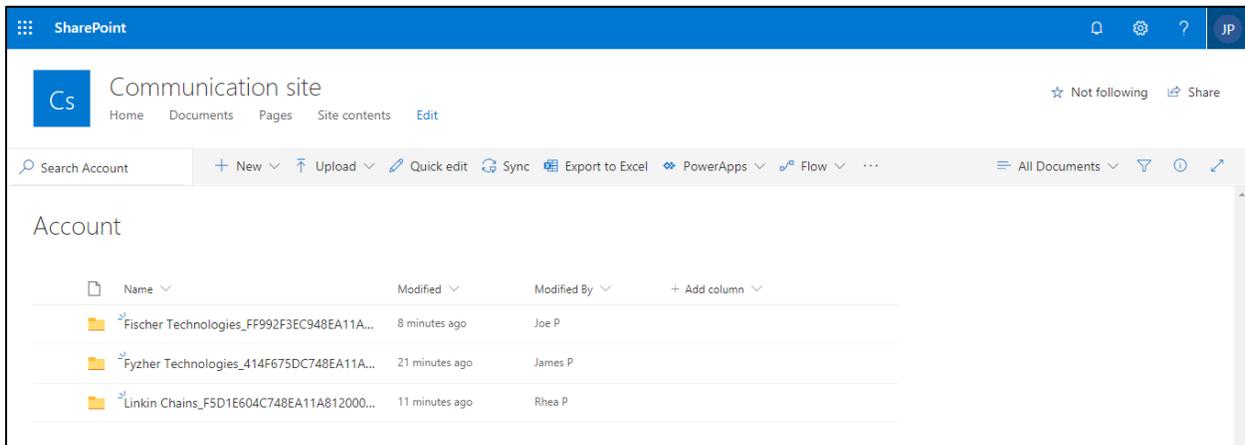


Rhea: With BU level access, she can see records of James and her own.

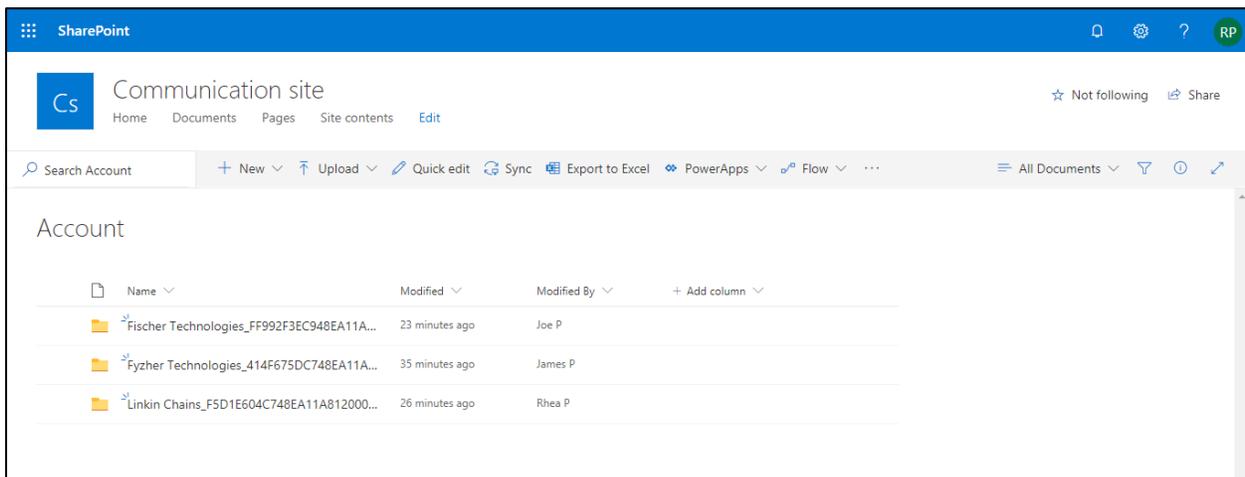
SharePoint Security Sync – User Manual



Joe: With org level access he can see all records.



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 Emails, Notes and Sales Literature Attachments**.

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 Email/Note/Sales Literature attachment we are moving to SharePoint.

The screenshot shows a configuration form for a Bulk Migration Job. The title is "Emails - Last X Weeks" and the subtitle is "Bulk Migration Job". In the top right corner, it says "Scheduled" and "Status Reason", and the owner is "Sam P". Below the title, there are four tabs: "General", "Information", "Bulk Migration Job Status", and "Related". The "General" tab is active. The form contains the following fields:

For ?	*	Emails	Select Duration Criteria	*	Last X Weeks
Connector	*	SharePoint_1	Value	*	2
Schedule Date	*	14-11-2019			16:00
Attachment Action	*	Move			

1. **For?:** This specifies whether we are doing **Bulk Migration** for **Emails, 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/Email Attachment/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 Notes/Email 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 Email attachments will move to a common folder named **Email Attachment or Regarding Folder**.

2. Information

BULK MIGRATION JOB		Status Reason	Owner																								
Emails - Last X Weeks		Completed	John Sam																								
Read only																											
<p>General Information Bulk Migration Job Status Related</p>																											
<table border="1"> <tr> <td>Total Records Processed</td> <td>161</td> <td colspan="2"></td> </tr> <tr> <td>Last updated:</td> <td>08-09-2019 14:37</td> <td colspan="2"></td> </tr> </table>				Total Records Processed	161			Last updated:	08-09-2019 14:37																		
Total Records Processed	161																										
Last updated:	08-09-2019 14:37																										
<table border="1"> <tr> <td>Total Succeeded Records</td> <td>160</td> <td>Total Succeeded Size (KB)</td> <td>46,234.85</td> </tr> <tr> <td>Last updated:</td> <td>08-09-2019 14:37</td> <td>Last updated:</td> <td>08-09-2019 14:37</td> </tr> <tr> <td>Total Ignored Records</td> <td>1</td> <td>Total Ignored Size (KB)</td> <td>0.89</td> </tr> <tr> <td>Last updated:</td> <td>08-09-2019 14:37</td> <td>Last updated:</td> <td>08-09-2019 14:37</td> </tr> <tr> <td>Total Failed Records</td> <td>0</td> <td>Total Failed Size (KB)</td> <td>0.00</td> </tr> <tr> <td>Last updated:</td> <td>08-09-2019 14:37</td> <td>Last updated:</td> <td>08-09-2019 14:37</td> </tr> </table>				Total Succeeded Records	160	Total Succeeded Size (KB)	46,234.85	Last updated:	08-09-2019 14:37	Last updated:	08-09-2019 14:37	Total Ignored Records	1	Total Ignored Size (KB)	0.89	Last updated:	08-09-2019 14:37	Last updated:	08-09-2019 14:37	Total Failed Records	0	Total Failed Size (KB)	0.00	Last updated:	08-09-2019 14:37	Last updated:	08-09-2019 14:37
Total Succeeded Records	160	Total Succeeded Size (KB)	46,234.85																								
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Last updated:	08-09-2019 14:37	Last updated:	08-09-2019 14:37																								
Total Failed Records	0	Total Failed Size (KB)	0.00																								
Last updated:	08-09-2019 14:37	Last updated:	08-09-2019 14:37																								

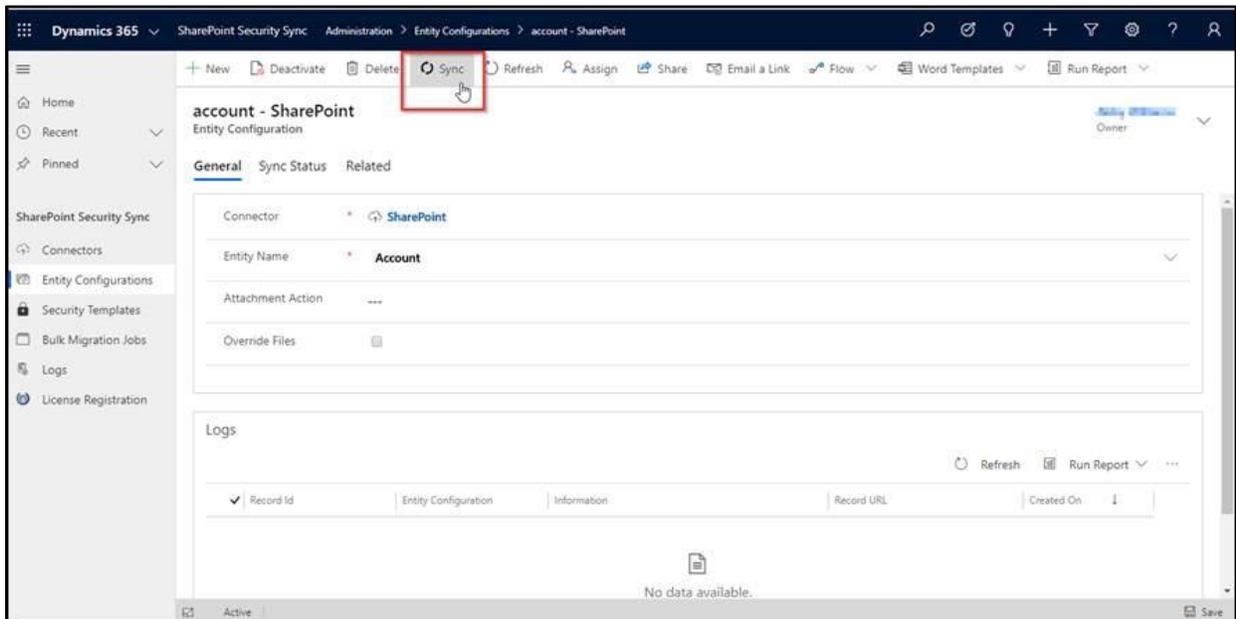
The next tab is **Information** that comprises the details of processed records.

- 1) **Total Records Processed:** Total number of Emails/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.

Sync Button

Sync button is visible only if there are failed sync records. In such a case just click on the 'Sync' button to complete the syncing process.



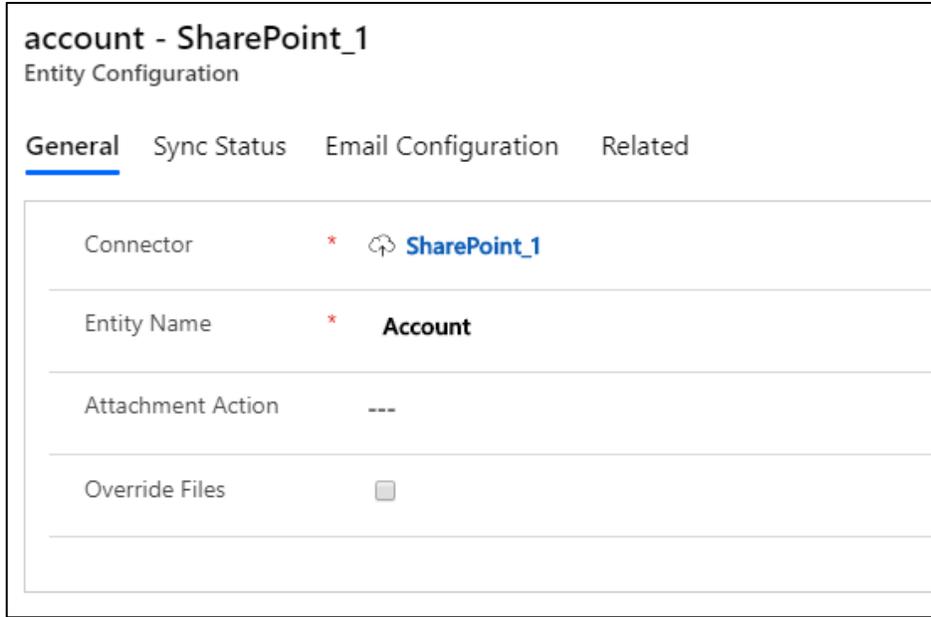
Visibility of Attach2Dynamics button

Attach2Dynamics button is visible only if;

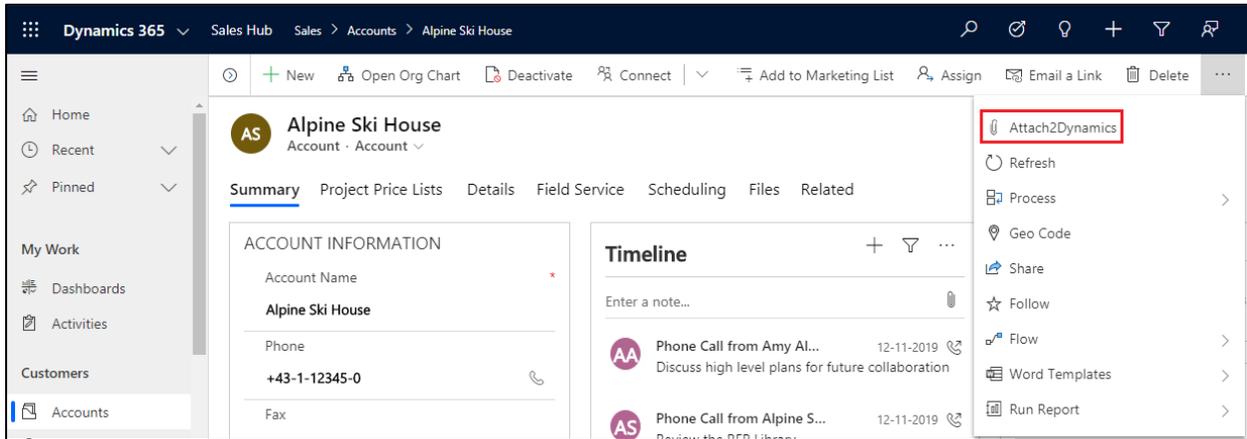
- 1) Logged in User is either has SharePoint Security Sync User or Administrator role
- 2) Entity Configuration record exists for that entity and is in active state.

Use of Attach2Dynamics

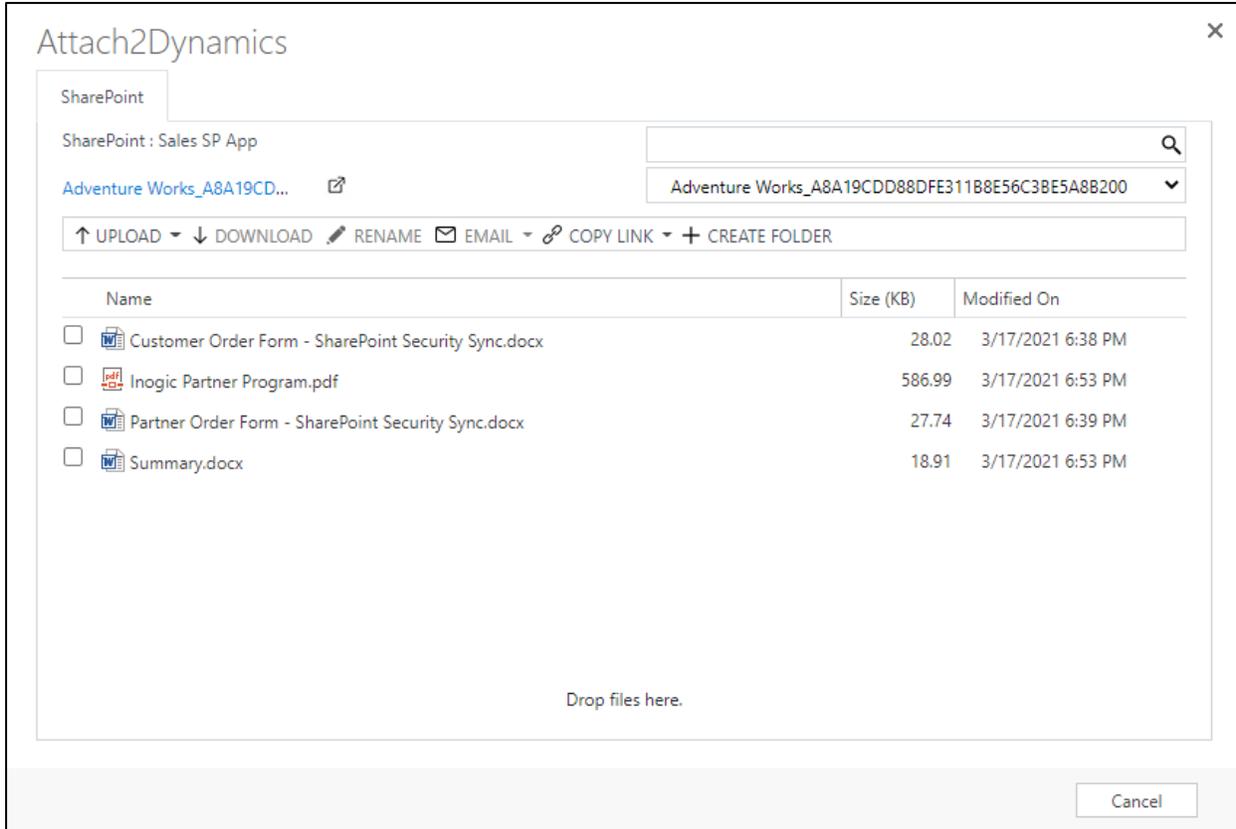
Once Entity Configuration record is created user can start using Attach2Dynamics. Let's take an example of Account entity. Suppose Entity configuration record for Account entity with SharePoint connector is created.



Attach2Dynamics button will be seen in the Command bar.



On Click of the button, Attach2Dynamics window opens.



Below are the features:

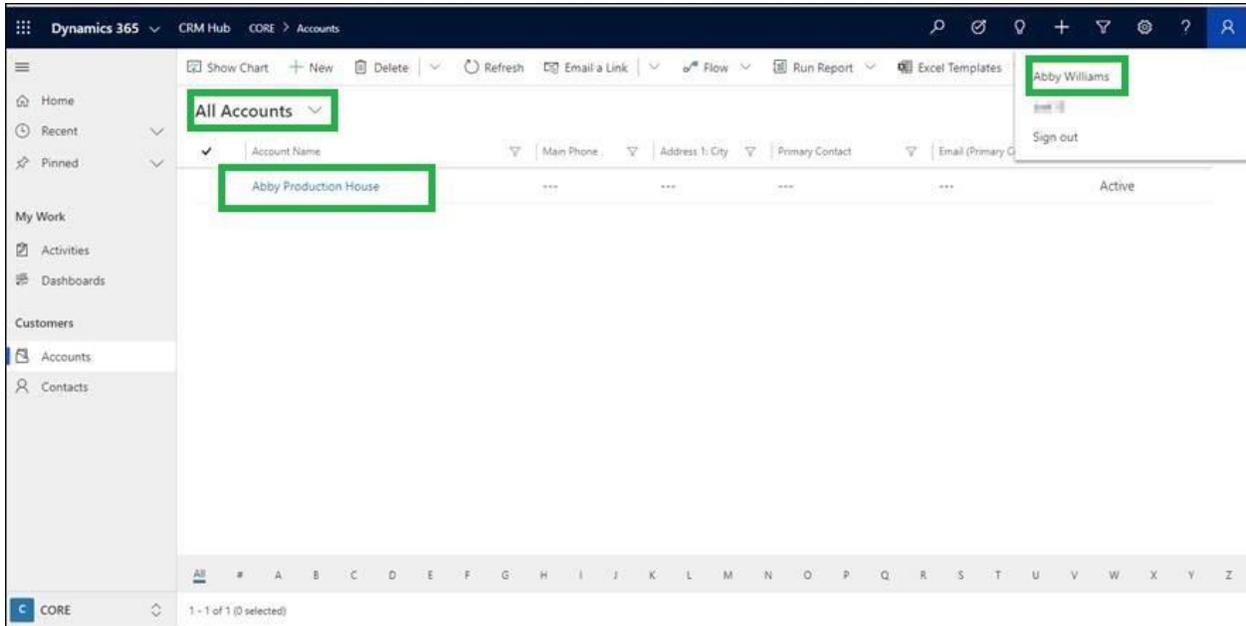
- a) **Sync Privileges** SharePoint Security Sync auto-syncs Dynamics 365 CRM security privileges with that of SharePoint. Any changes made to the security role of a user in Dynamics 365 CRM will be replicated in SharePoint with the help of this SharePoint Security Sync feature.

SharePoint Security Sync – User Manual

Security Role: Sales Manager Working on solution: Default Solution

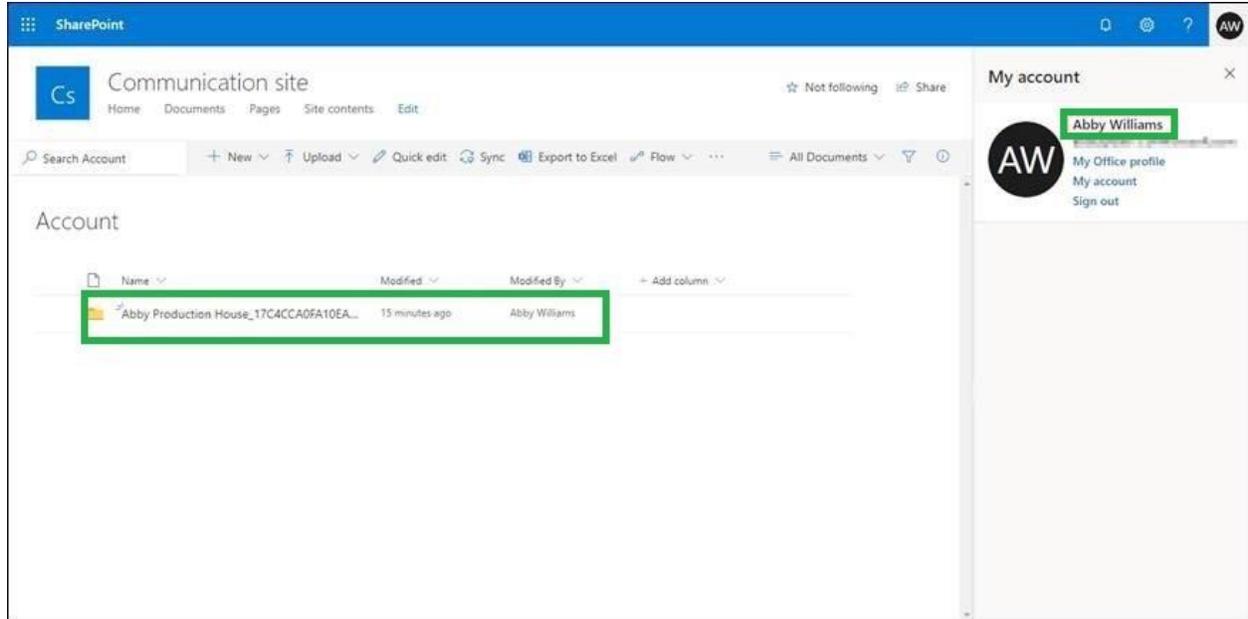
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account	🟡	🟢	🟢	🟡	🟢	🟢	🟡	🟢
ACIViewMapper	🔴	🟢	🔴	🔴	🟡	🟢	🔴	🟡
Action Card	🟡	🟡	🟡	🟡	🟡	🟢	🔴	🟡
Action Card User Settings	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Activity	🟡	🟢	🟡	🟡	🟡	🟡	🟡	🟢
Advanced Similarity Rule	🔴	🔴	🔴	🔴	🔴	🔴	🔴	🔴
Announcement	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Application File	🔴	🟢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

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



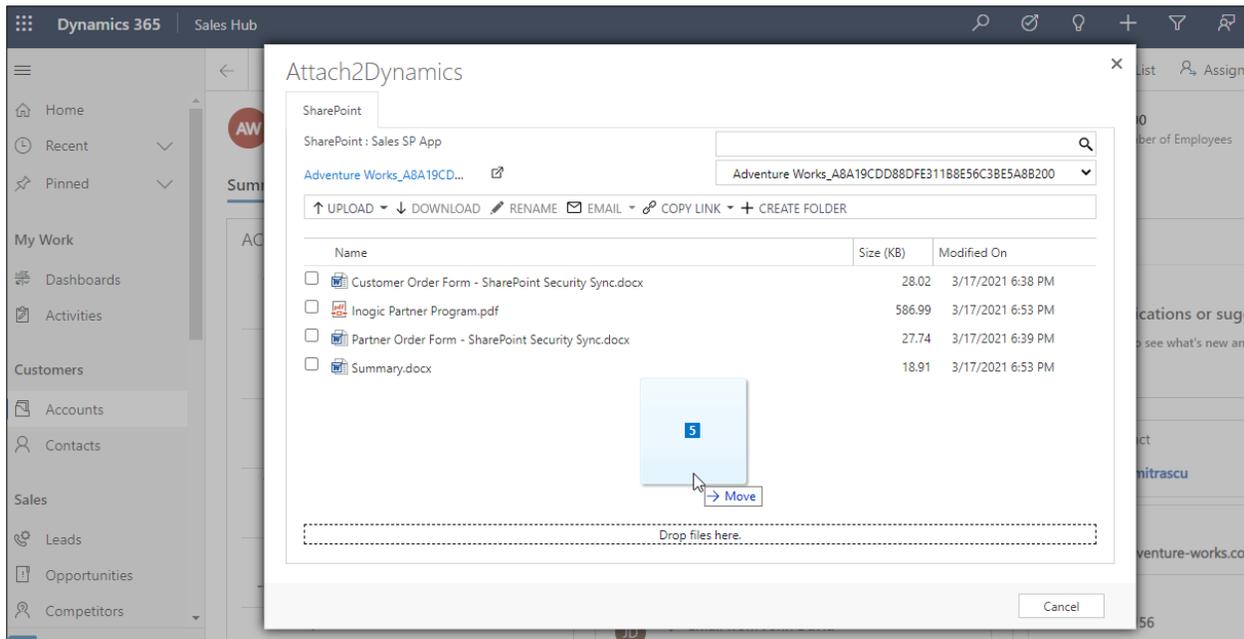
With SharePoint Security Sync, the user will have the same privileges in SharePoint also i.e. , the user will only be able to see '**Abby Production House**' record of Account entity in SharePoint site.

SharePoint Security Sync – User Manual



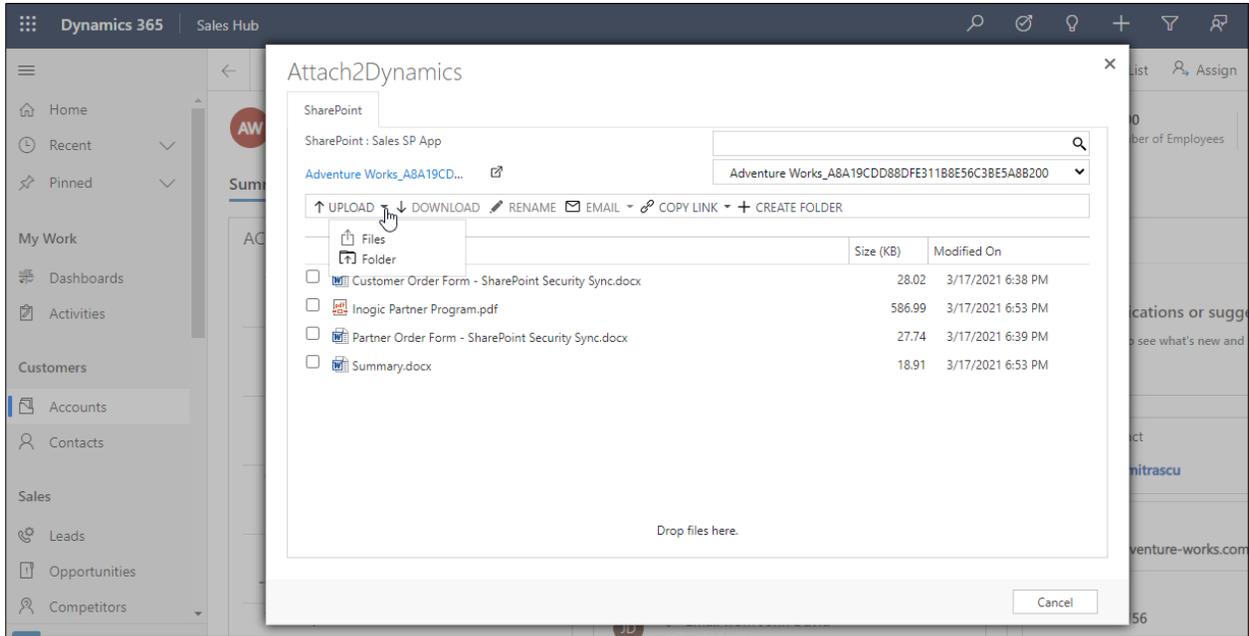
b) Drag and Drop Files and Folders: Users can drag and drop multiple files and folders at one time to SharePoint.

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

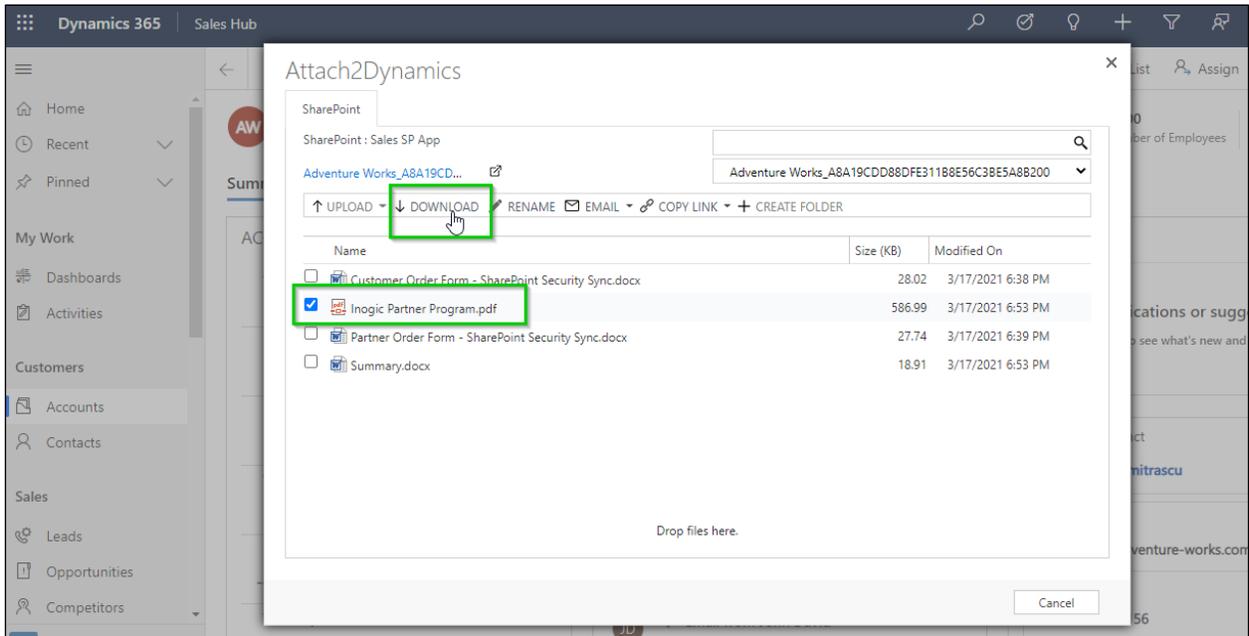


c) Upload: Users can upload multiple files and single folder at a time using the solution. They get user-friendly UI to see the list of files uploaded on SharePoint against the current record. Upload Folder through button is not available on IE.

SharePoint Security Sync – User Manual

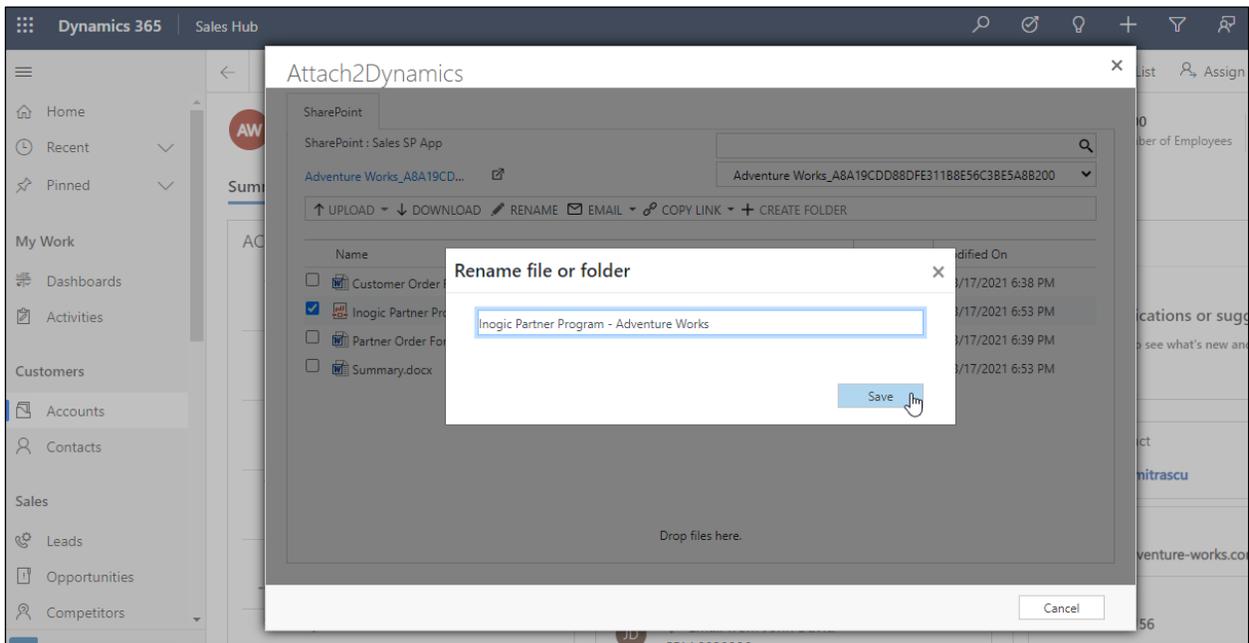
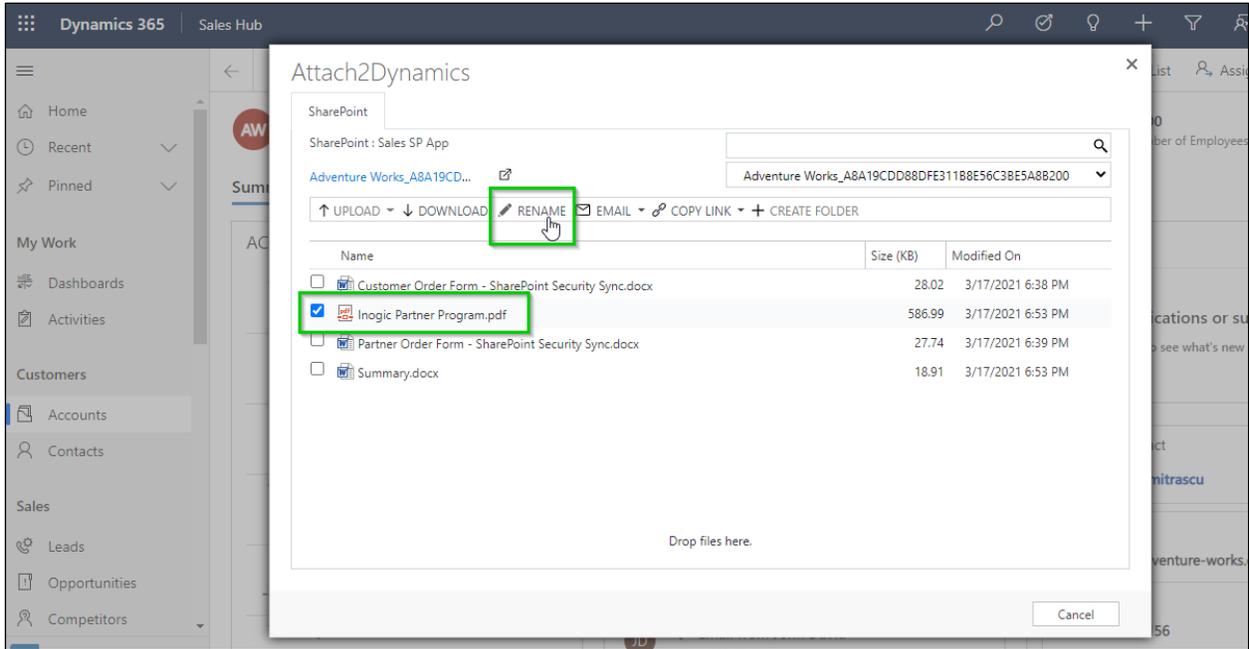


- d) Download:** Users can get access to all documents of required storage system and download them. Bulk download of files is possible. Download of folder is not supported for SharePoint.



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

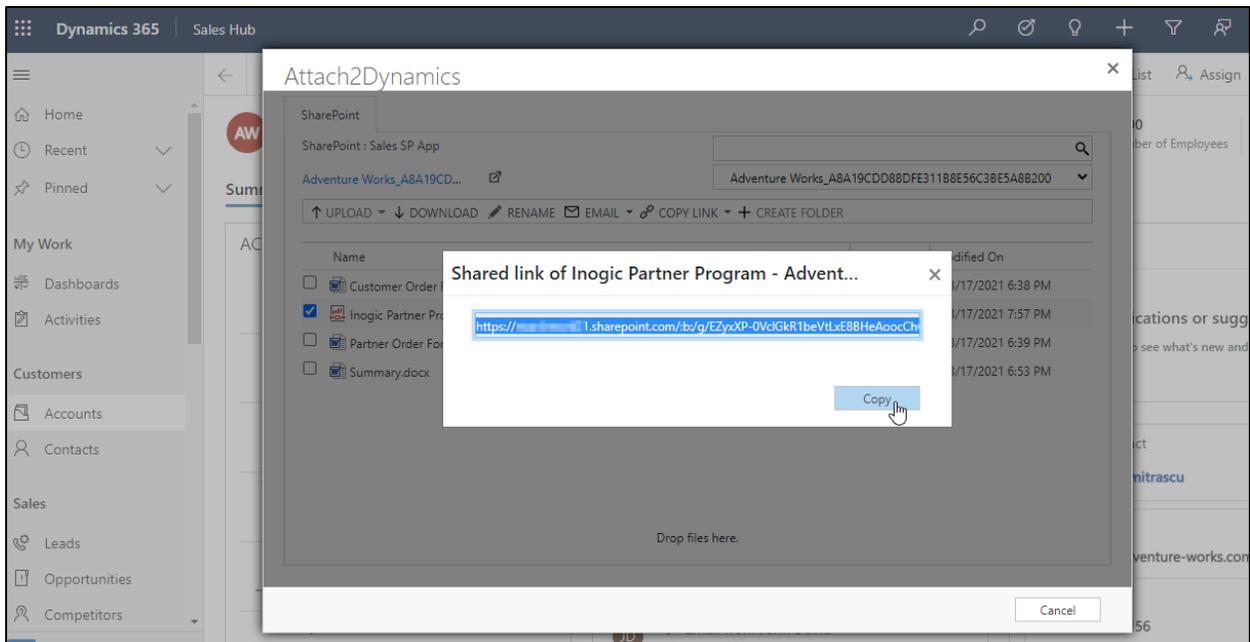
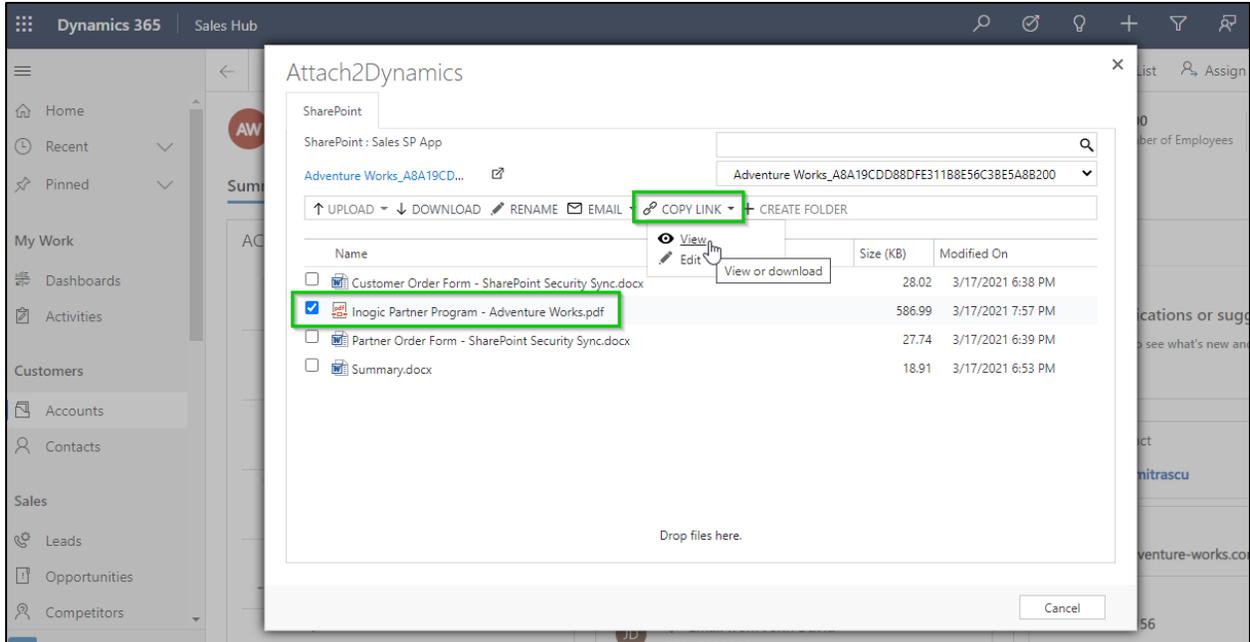
SharePoint Security Sync – User Manual



- 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.

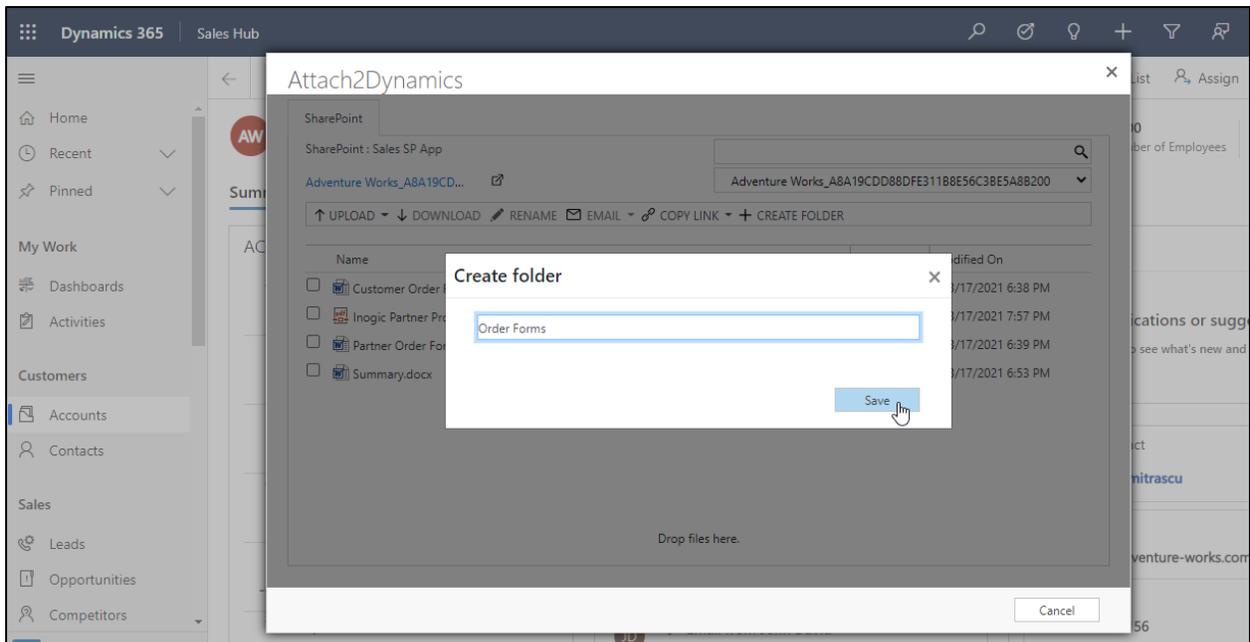
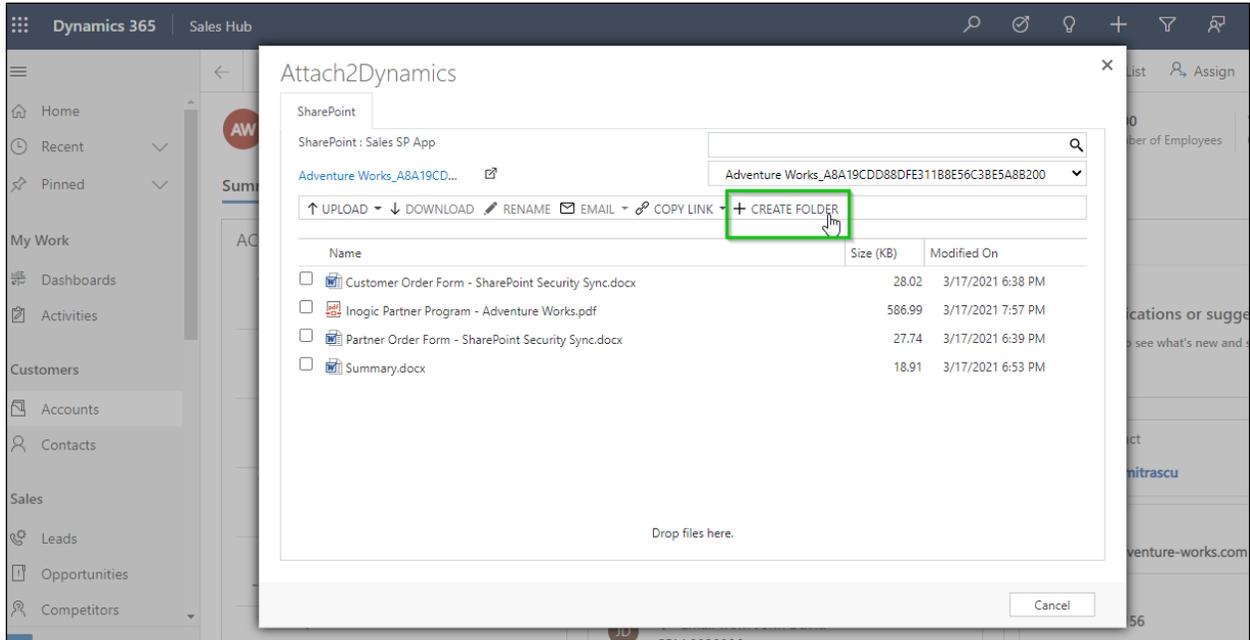
If only **View** is selected then the document is available in read only mode whereas, if **Edit** mode is selected then the document is available for editing.

SharePoint Security Sync – User Manual



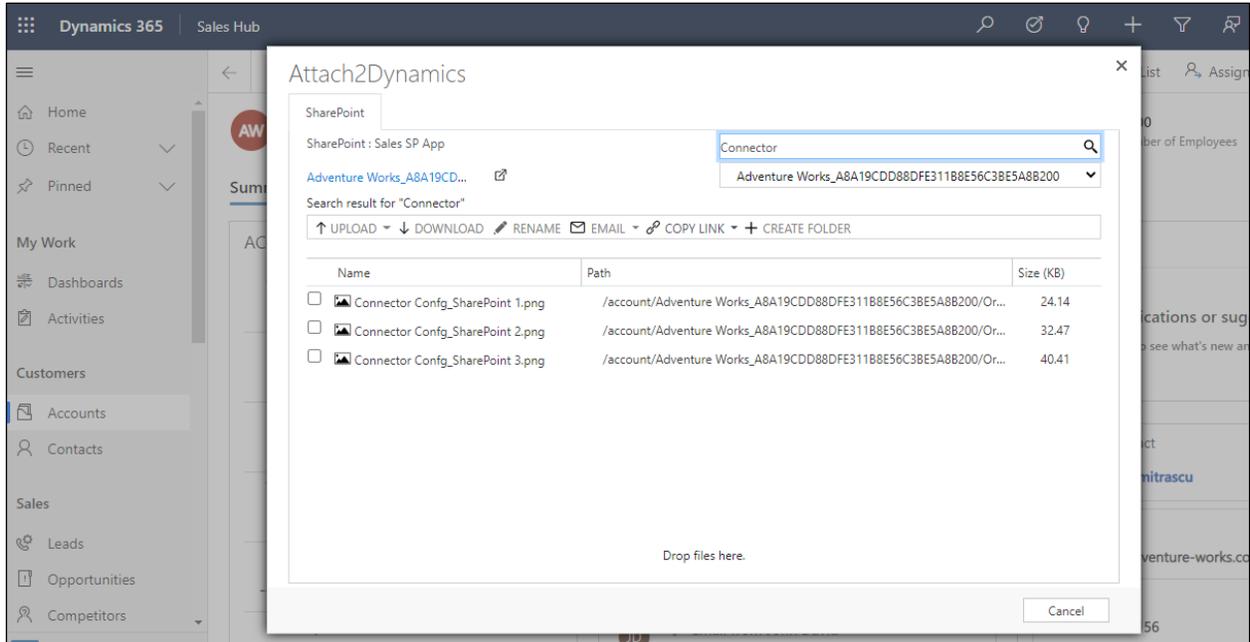
g) Create Folder: Users can create folders in SharePoint as per requirement.

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

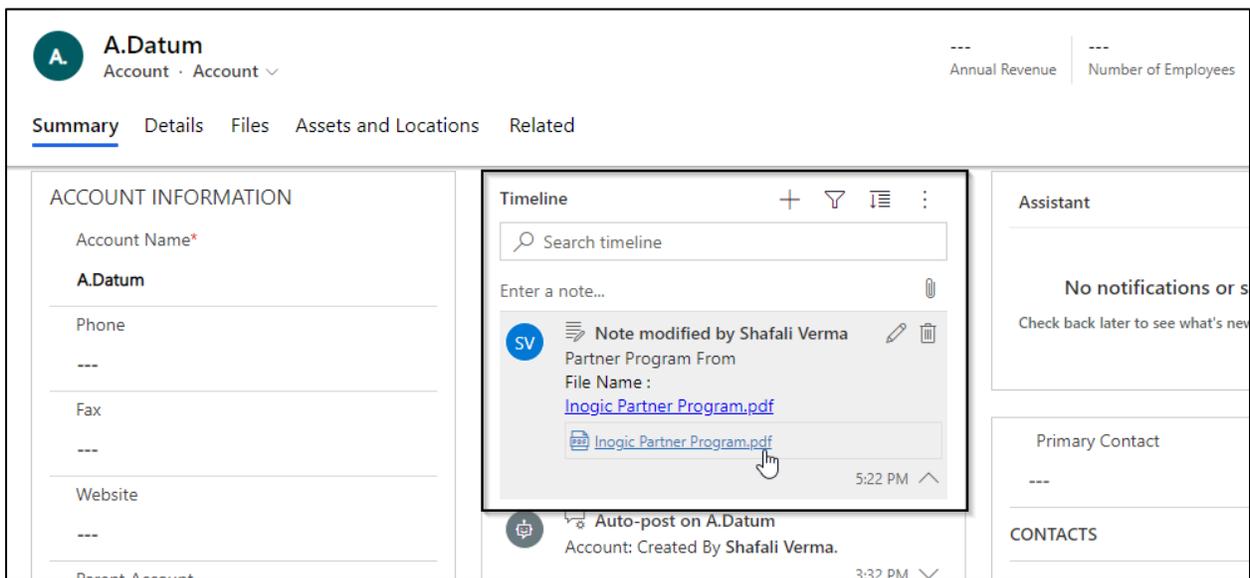


i) **Move/Copy Dynamics 365 CRM Attachments:** Users can move/copy Dynamics 365 CRM Notes Attachments/Email Attachments and Sales Literature Attachments to SharePoint.

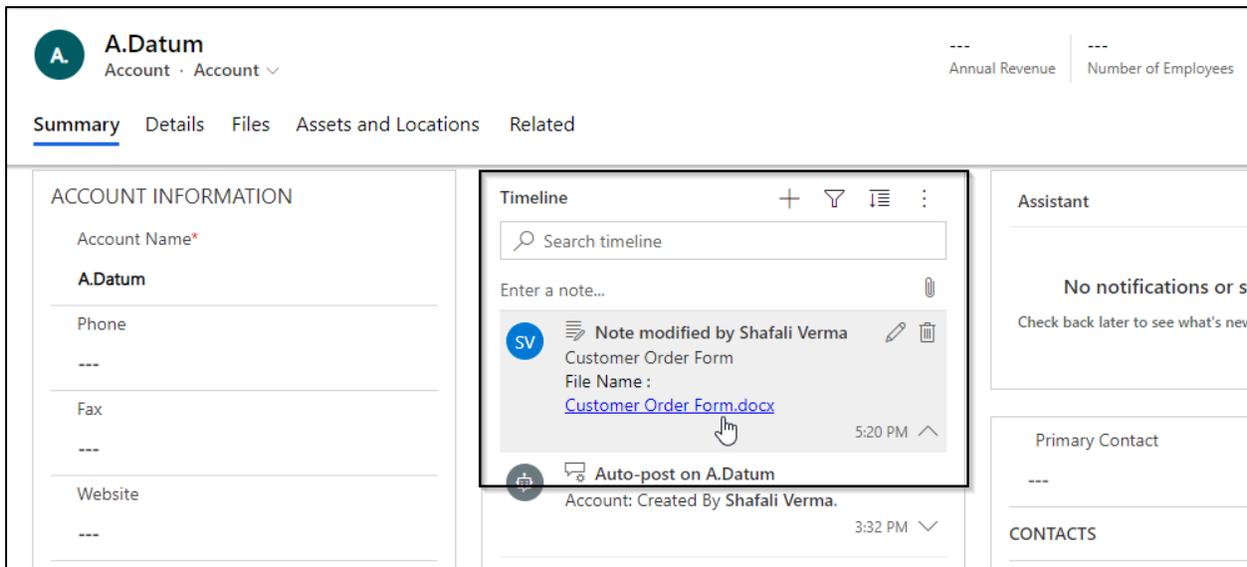
a. **Notes:**

If enabled, it'll move/copy the Note Attachments to the respective entity folder and leave a hyperlink of the path in Note Body.

Copy:



Move:

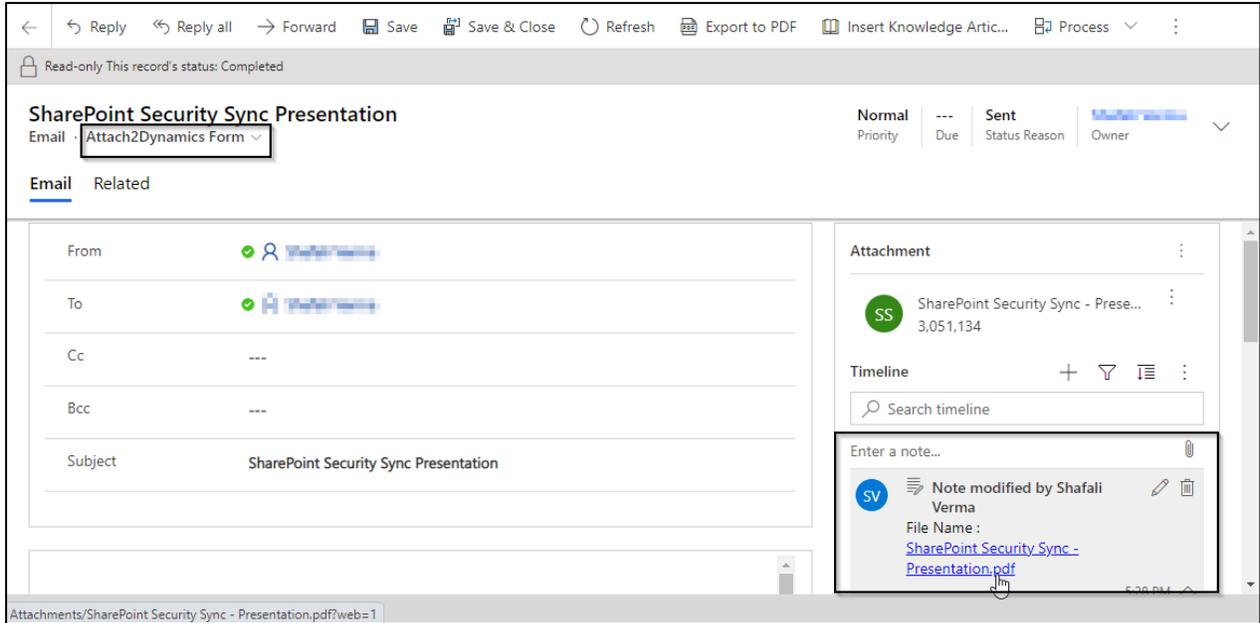


b. Email Attachments:

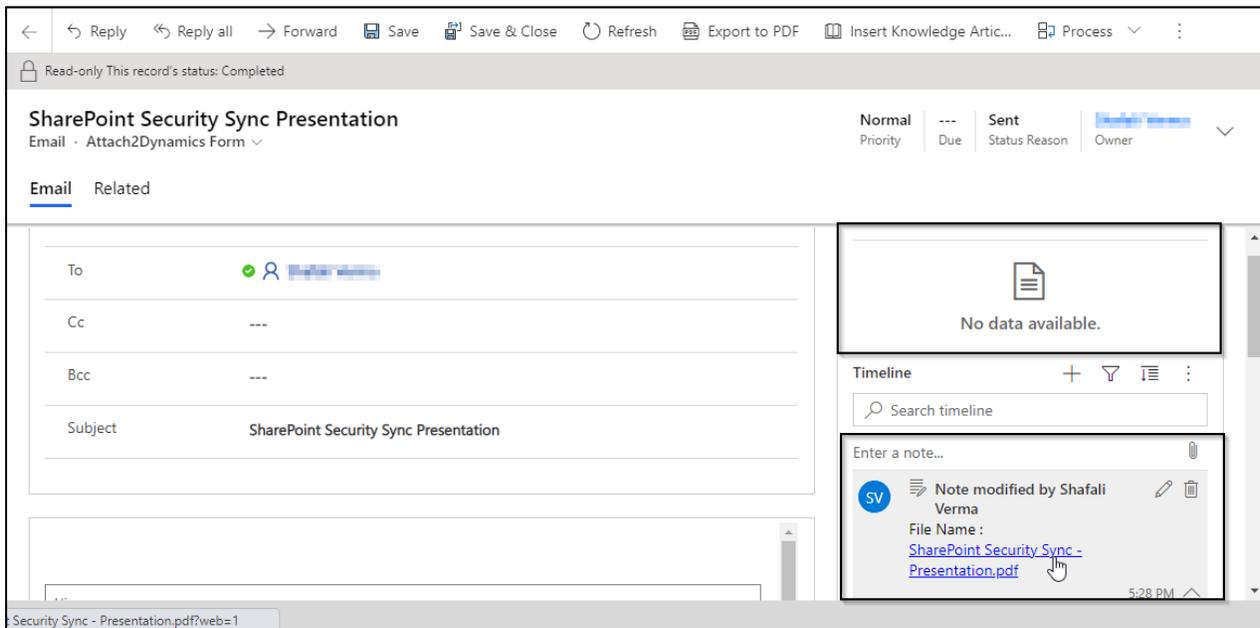
If enabled, it'll move/copy the Email Attachments to a common folder called Email Attachments or Regarding folder and leave a hyperlink of the path in Note Body.

Copy:

SharePoint Security Sync – User Manual



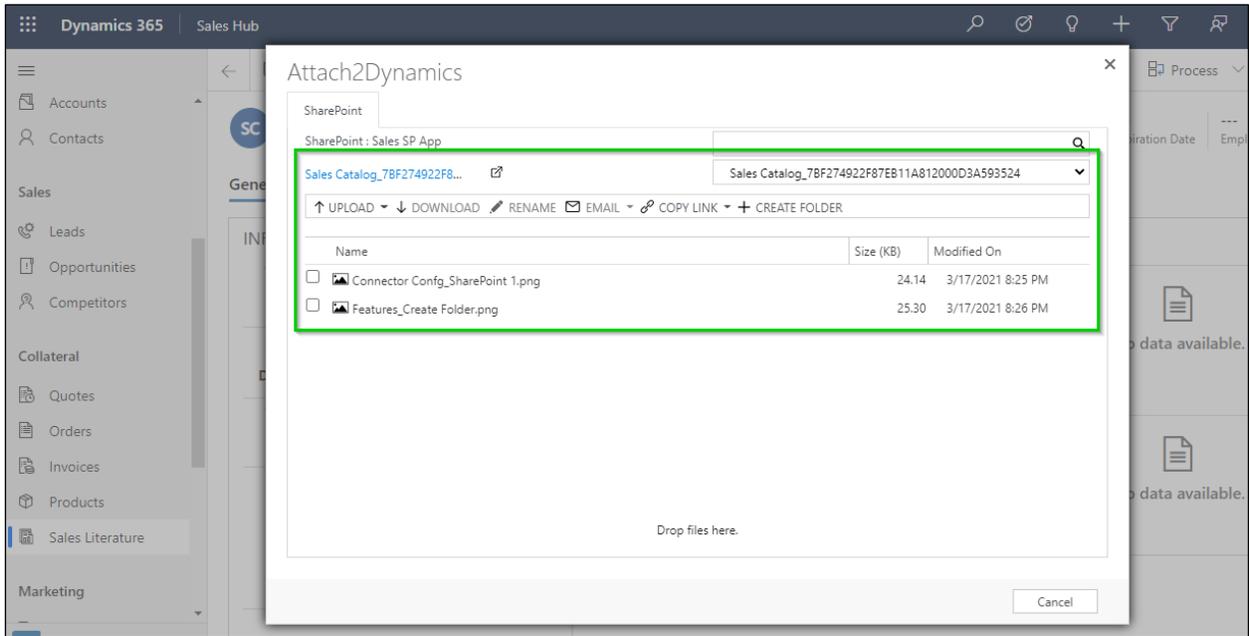
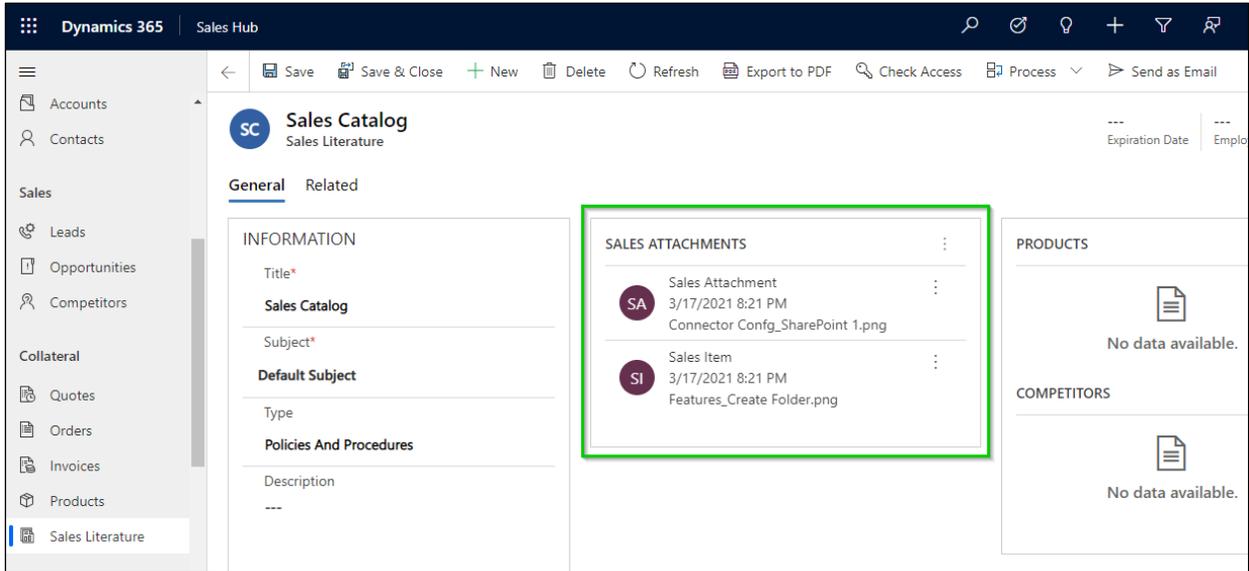
Move:



c. Sales Literature Attachments:

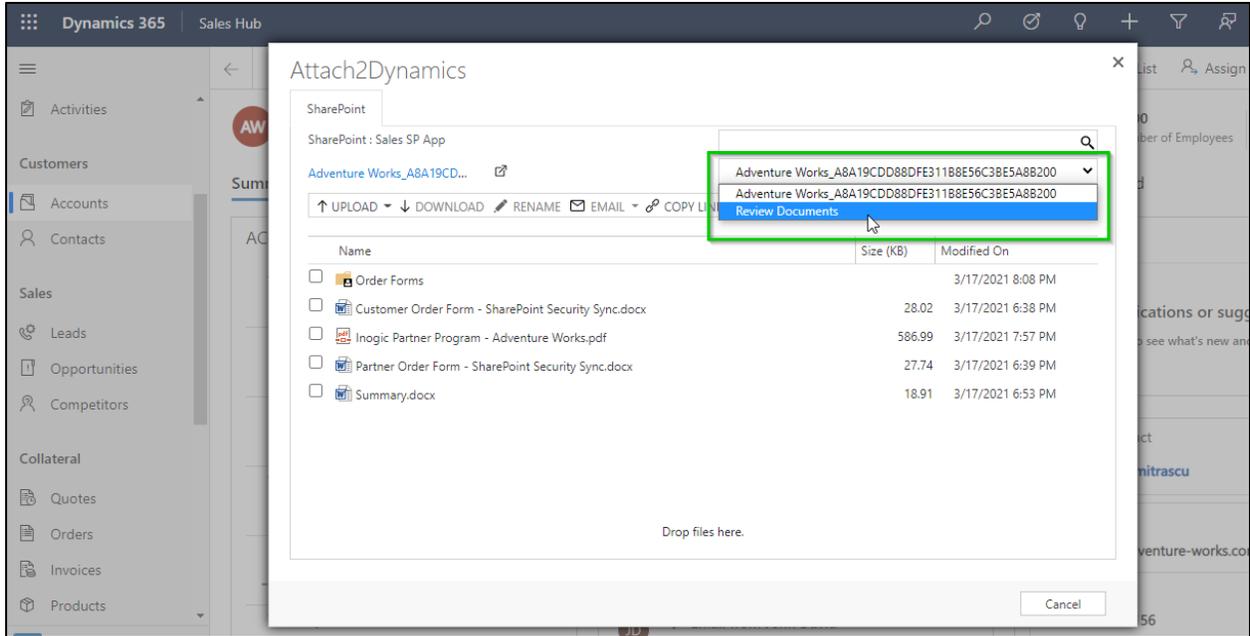
If enabled, it'll move/copy the Sales Literature Attachments to the respective Sales Literature folder and leave a hyperlink of the path back in Cloud Storage Links section.

SharePoint Security Sync – User Manual

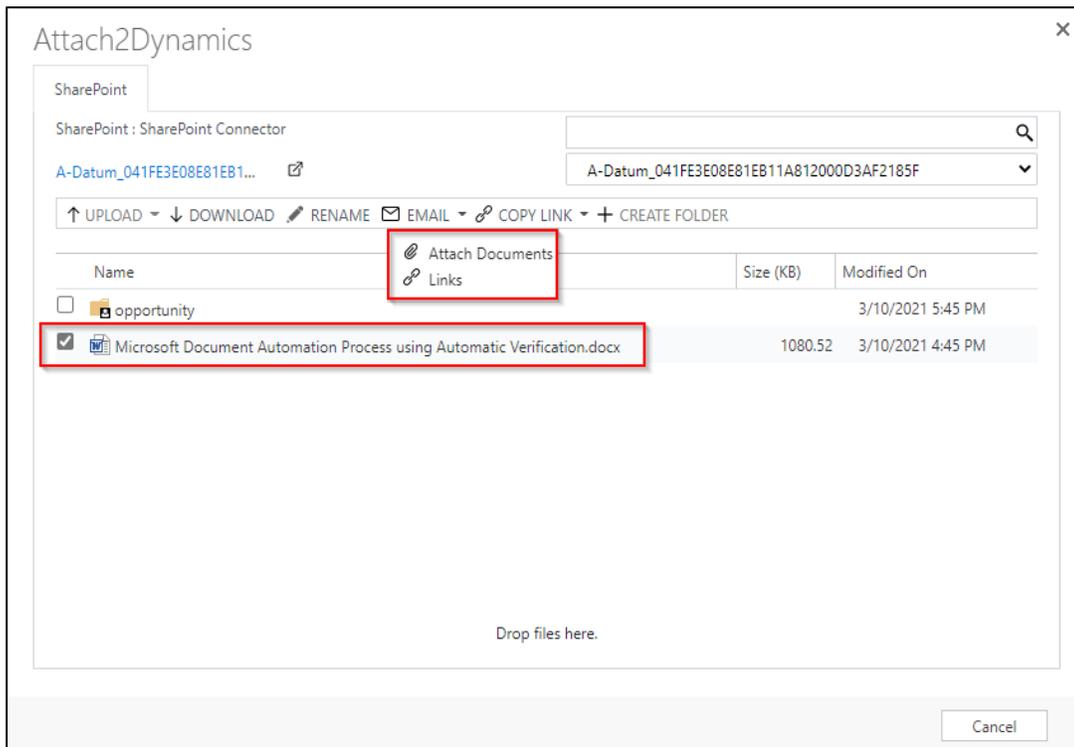


- j) **Document Location:** For a record, we can have multiple Document Locations within SharePoint Site. With the help of Attach2Dynamics, you can select which folder (Document Location) you want to upload the file in an easy to use UI.

SharePoint Security Sync – User Manual

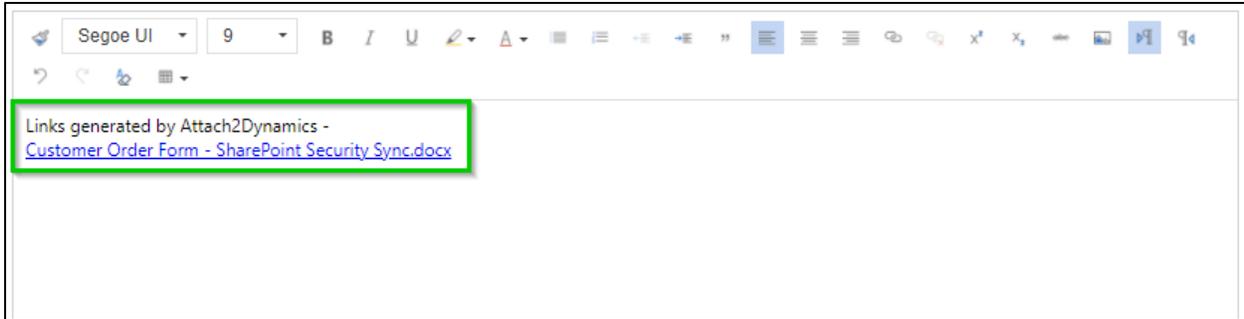


k) **Email:** Users also have an option to send an email. There are two options for this – send as **Link** or **Attachment**.



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.

SharePoint Security Sync – User Manual

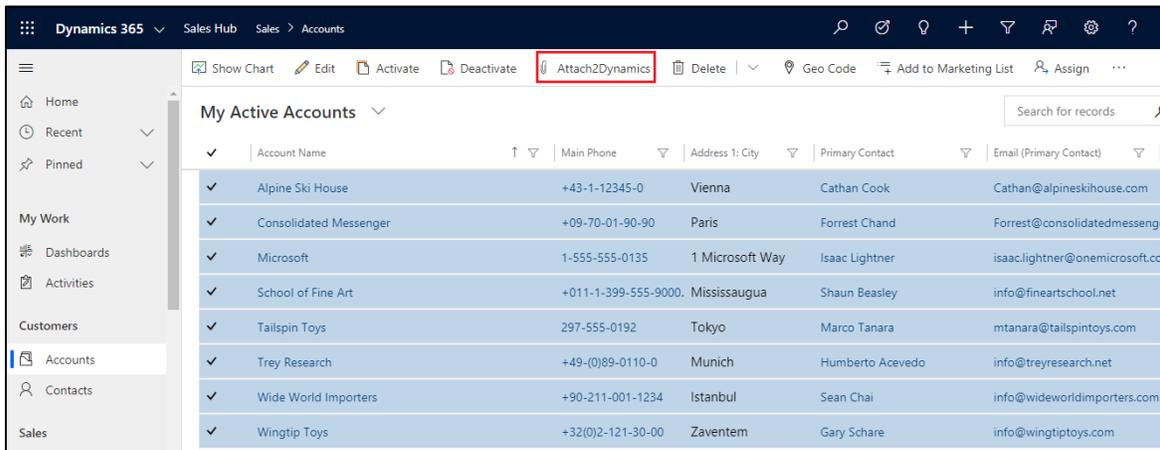


2) Attach Documents: On selecting this option you can attach the file itself in the email body. The below window opens with file as attachment by choosing 'Attach.'

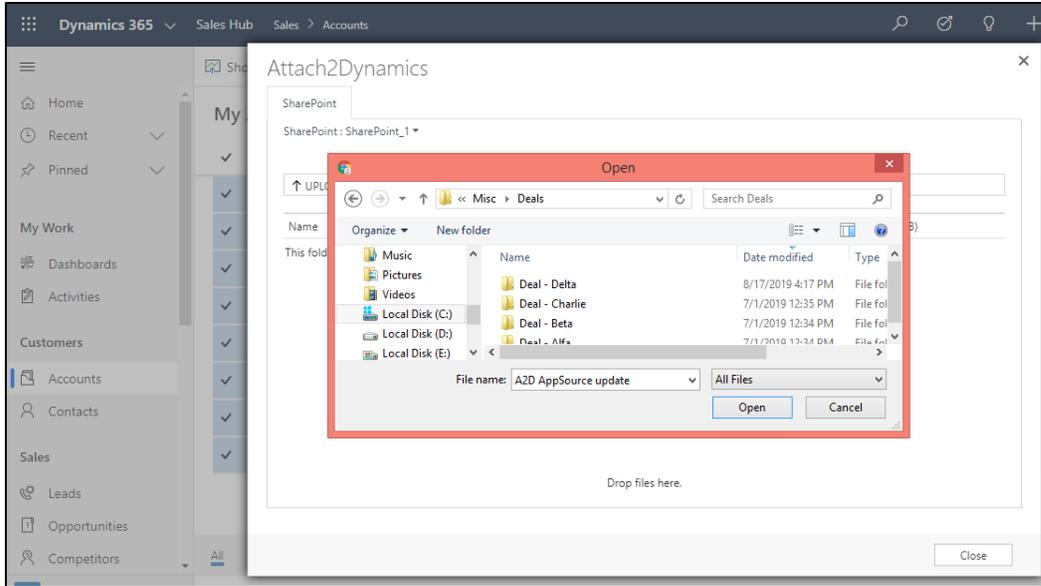


Note: Email can be sent only with files and not folders. Also, multiple files can be sent in single mail.

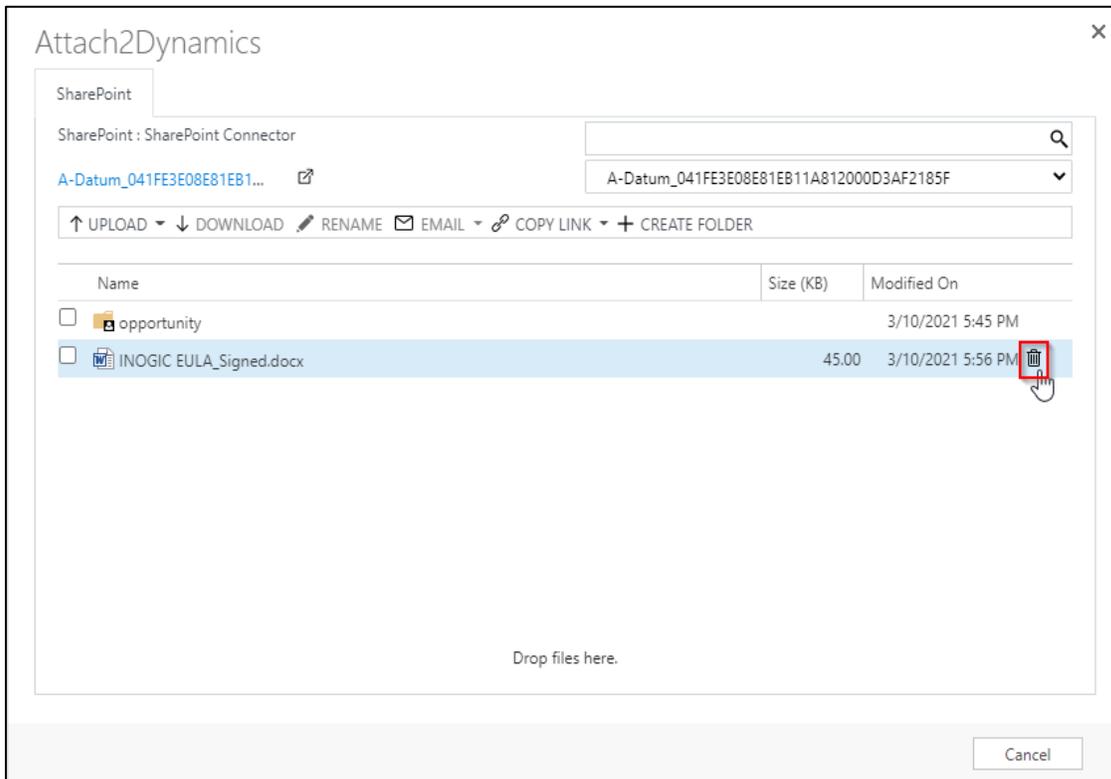
1) Support for uploading files from Home Page: Upload files from home page directly for the selected records.

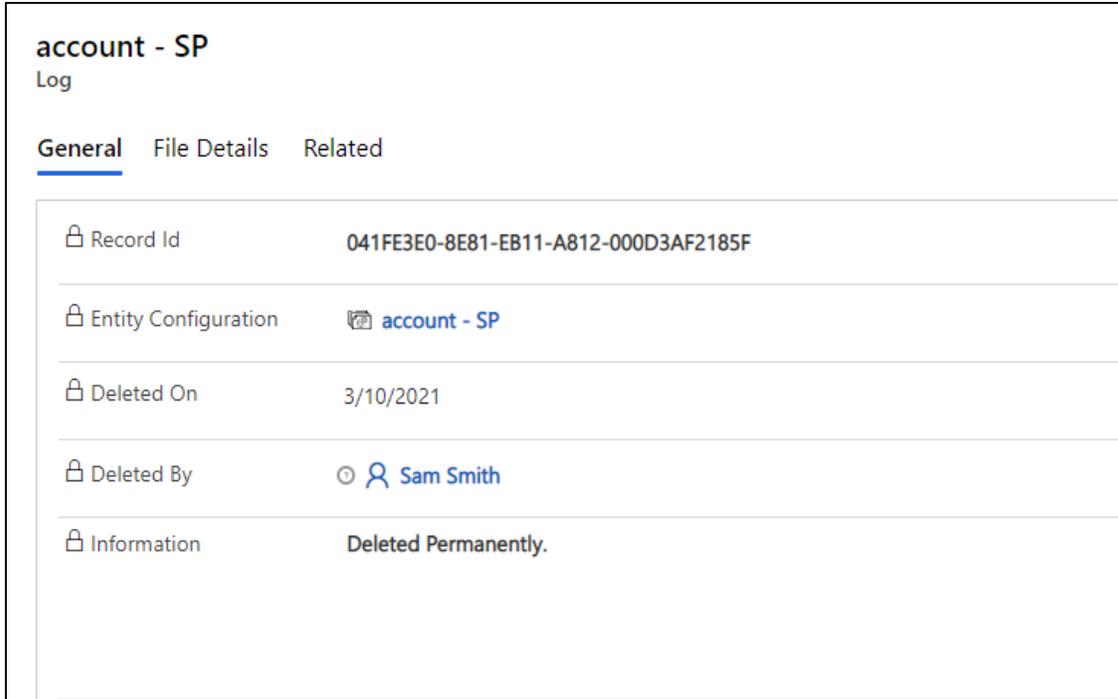


SharePoint Security Sync – User Manual

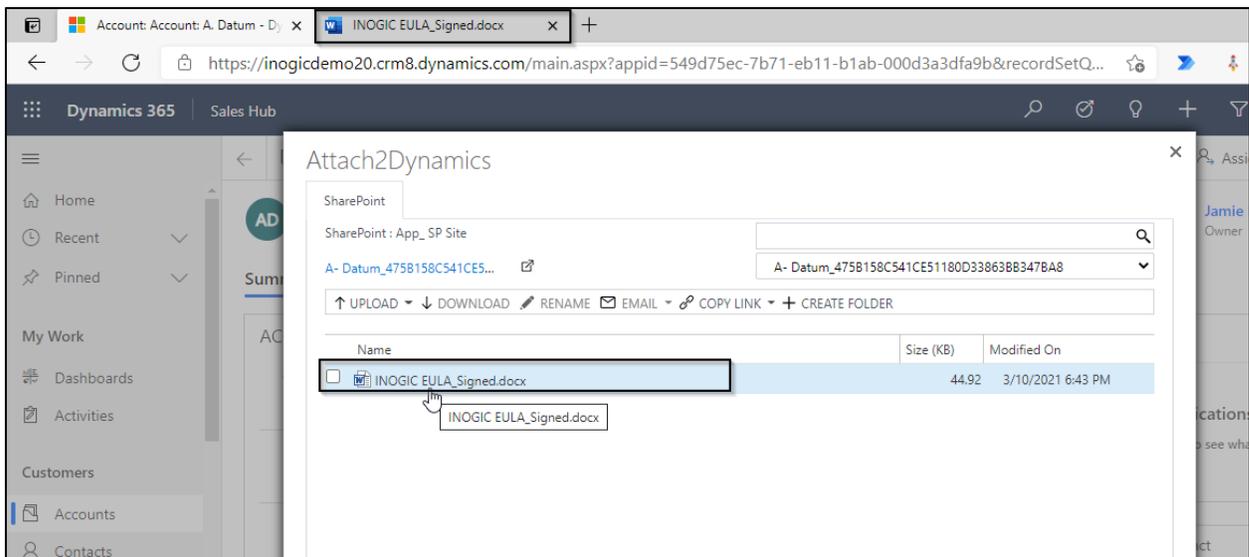


m) Delete: Users can delete files from SharePoint.





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

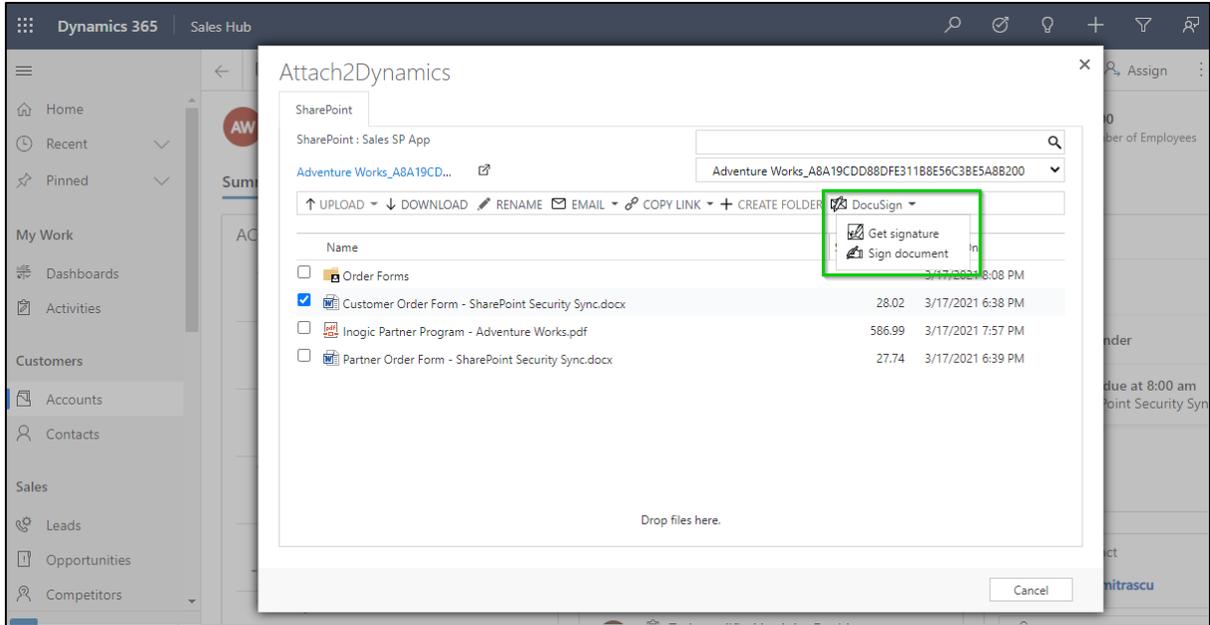


o) **DocuSign:** Users are given the provision to use the features of DocuSign to electronically sign documents/attachments stored in SharePoint.

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.

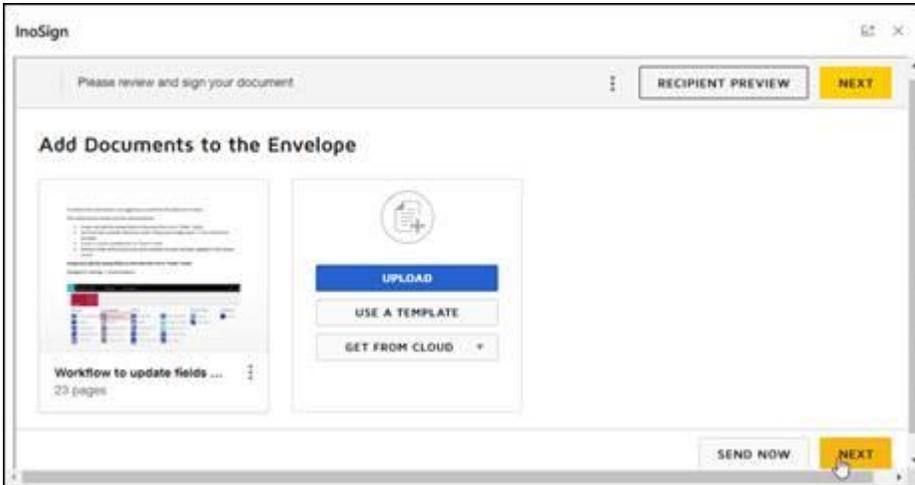
Note: To use this feature both DocuSign solution and SharePoint Security Sync solution must be installed.

SharePoint Security Sync – User Manual



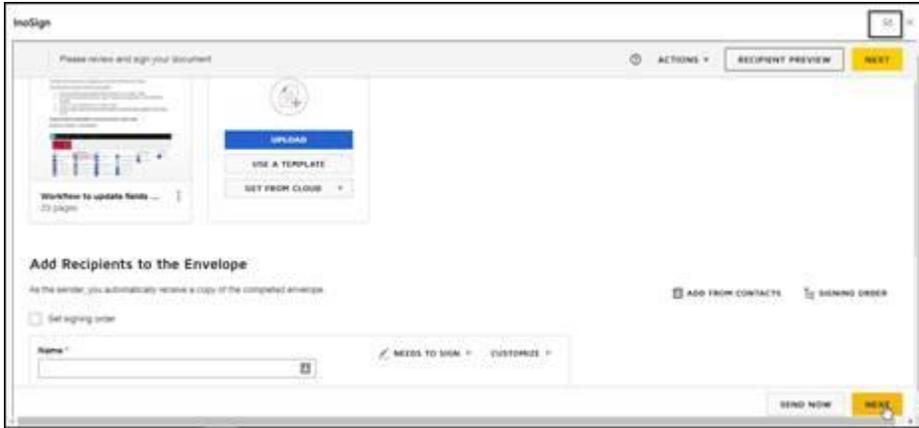
Note : The entity for which you want to use the DocuSign feature should be enabled for notes.

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



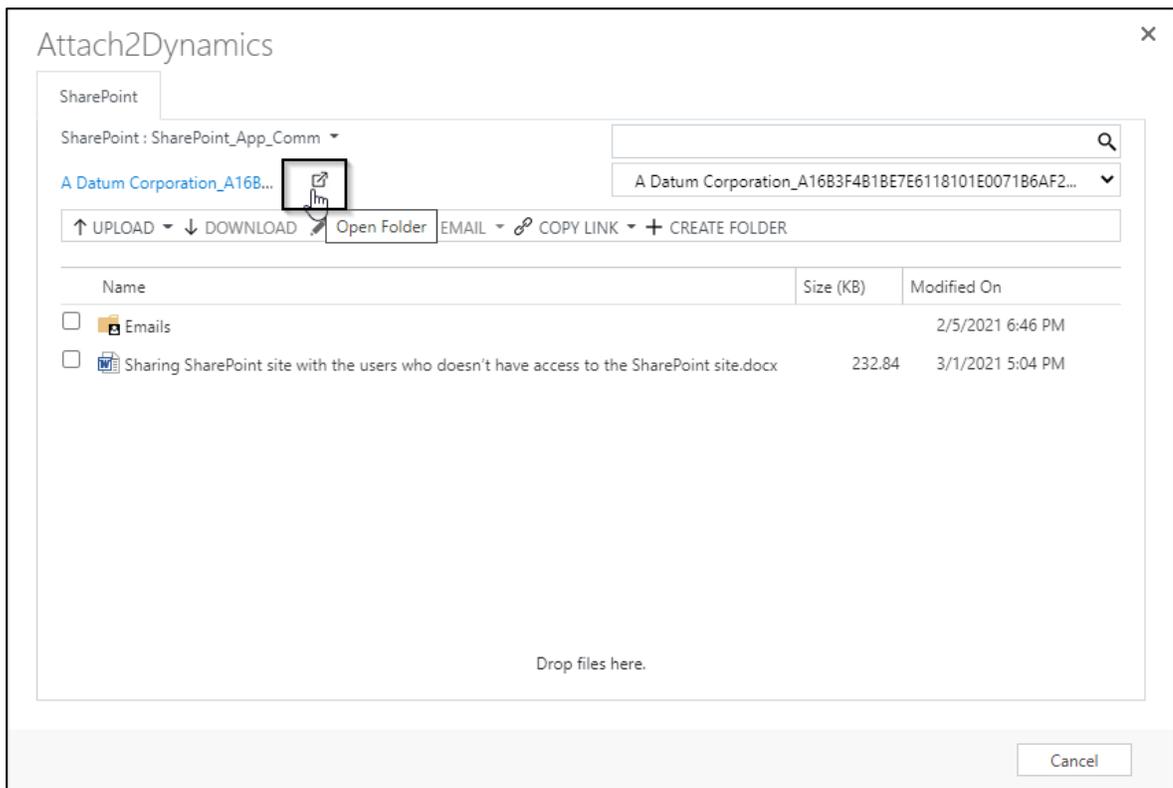
Users can switch to Fullscreen/default screen mode using the highlighted icon in the below screenshot.

SharePoint Security Sync – User Manual

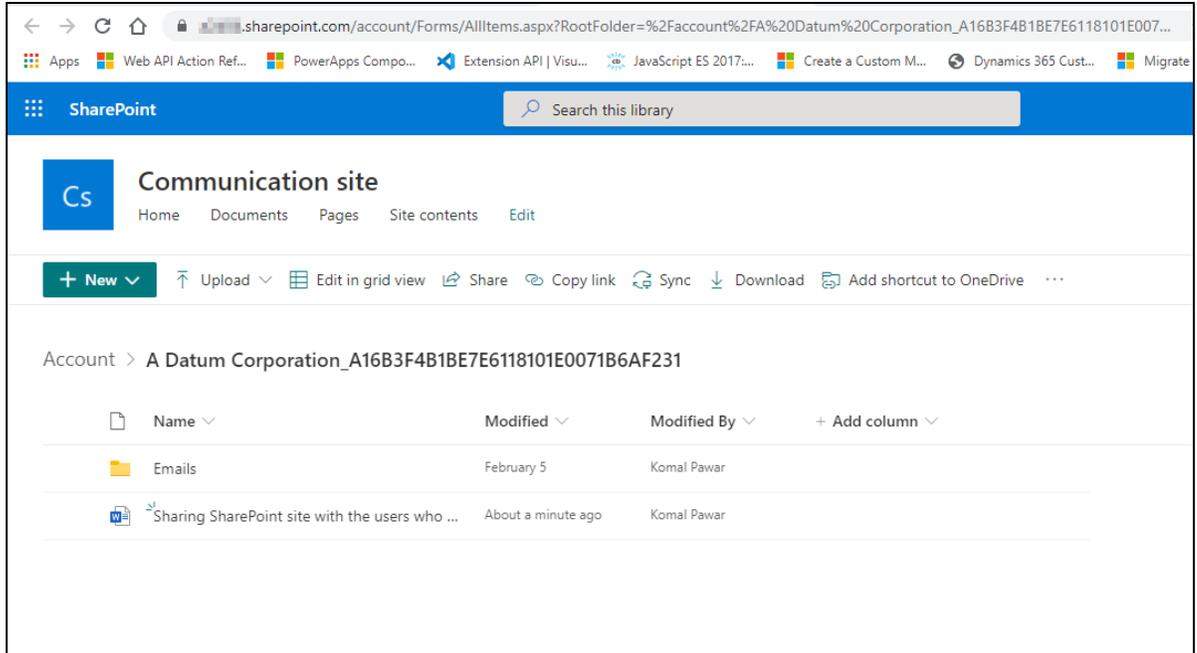


Note: It may take time to load the DocuSign UI.

p) 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.

q) 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:

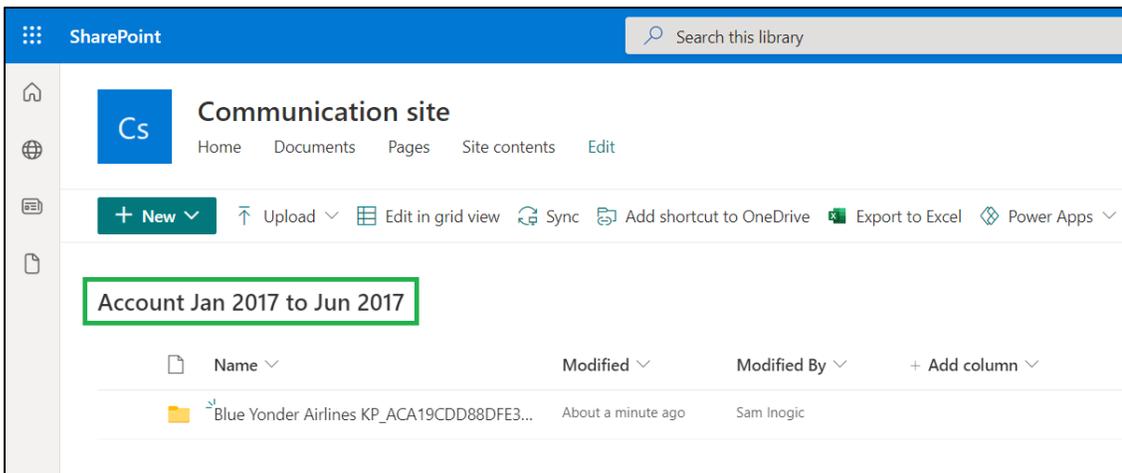
- i) **By Period:** Using this option user can create datewise, daywise, monthwise and yearwise document library structure within SharePoint. It comes handy for maintaining daily, monthly, quarterly sales or financial data in SharePoint. In the below screenshot, configuration of custom folder structure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

account - Sp_Sharepoint - Saved
Entity Configuration

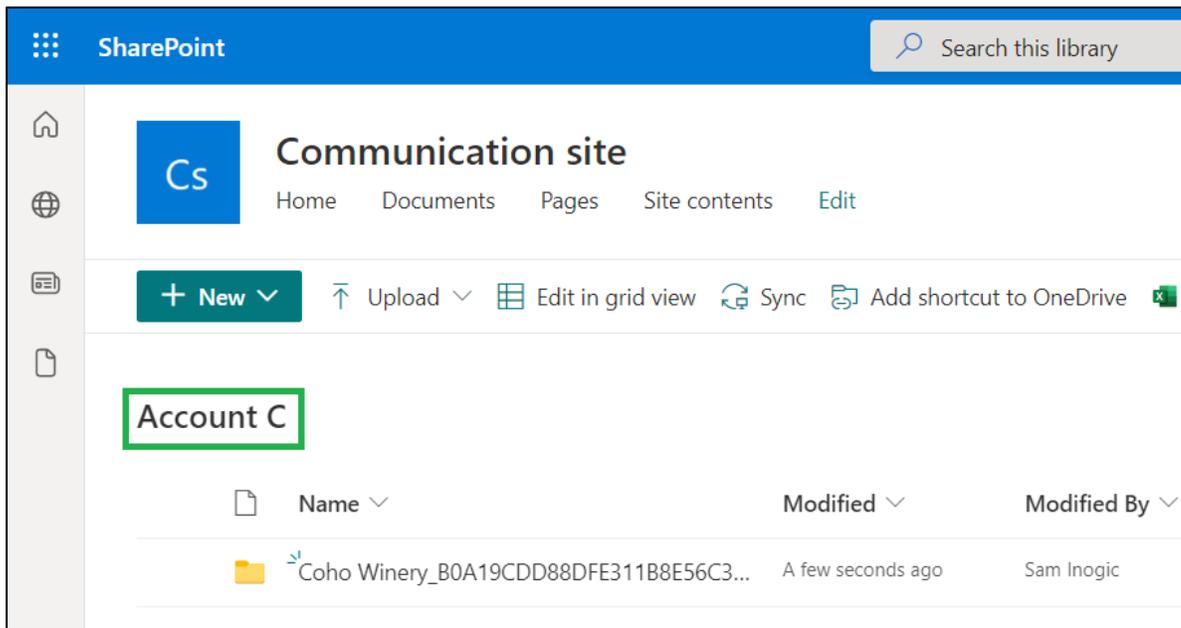
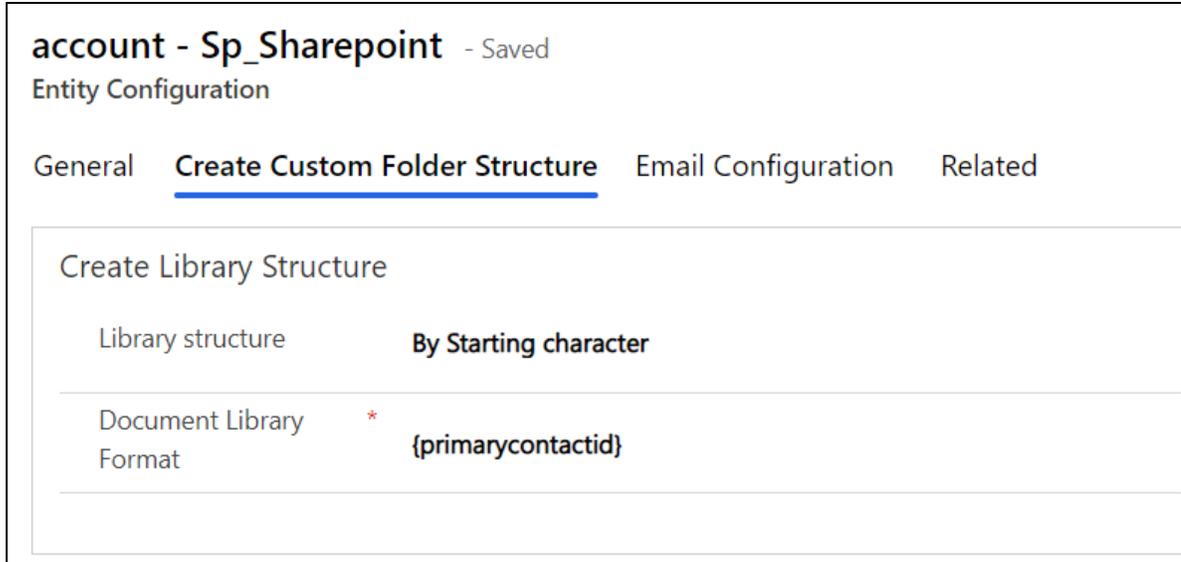
General Create Custom Folder Structure Email Configuration Related

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:



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:

Entity Configuration

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

Create Library Structure

Library structure	Custom
Document Library Format	* {primarycontactid}

SharePoint Search this library

Cs Communication site Home Documents Pages Site contents Edit

+ New Upload Edit in grid view Sync Add shortcut to OneDrive

Account Patrick Steiner

Name	Modified	Modified By
Lucerne Publishing_BEA19CDD88DFE311B8...	A few seconds ago	Sam Inogic

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**

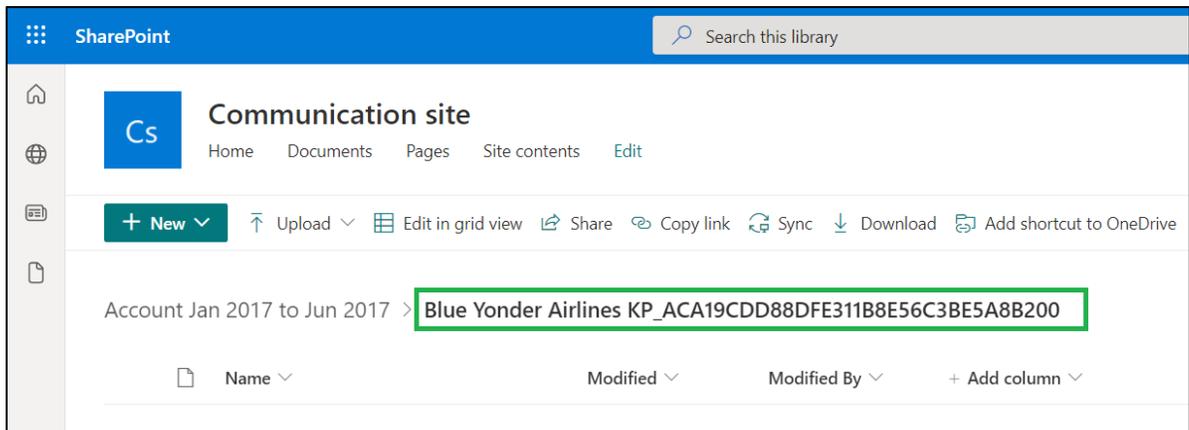
Period type * **X Month**

Duration * **6**

Select date Format *

Create Record Folder Structure

Folder Format **{name} KP**



r) 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.

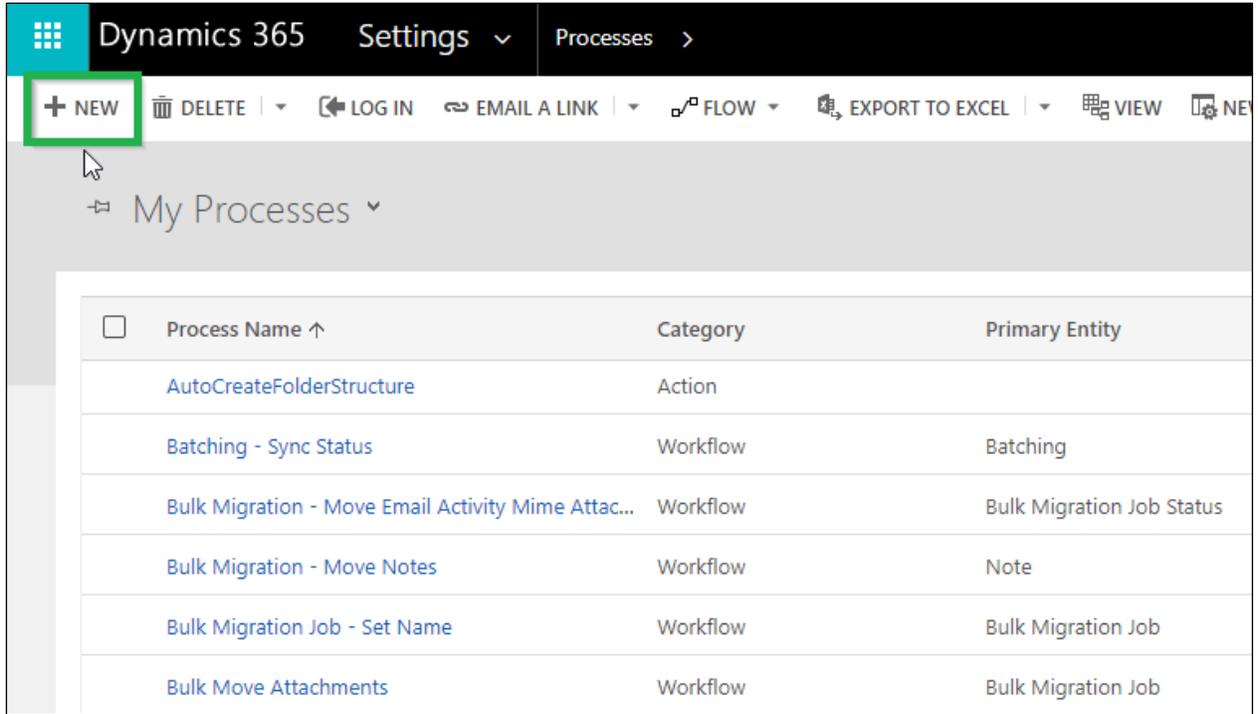
account - SharePoint - Saved
Entity Configuration

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

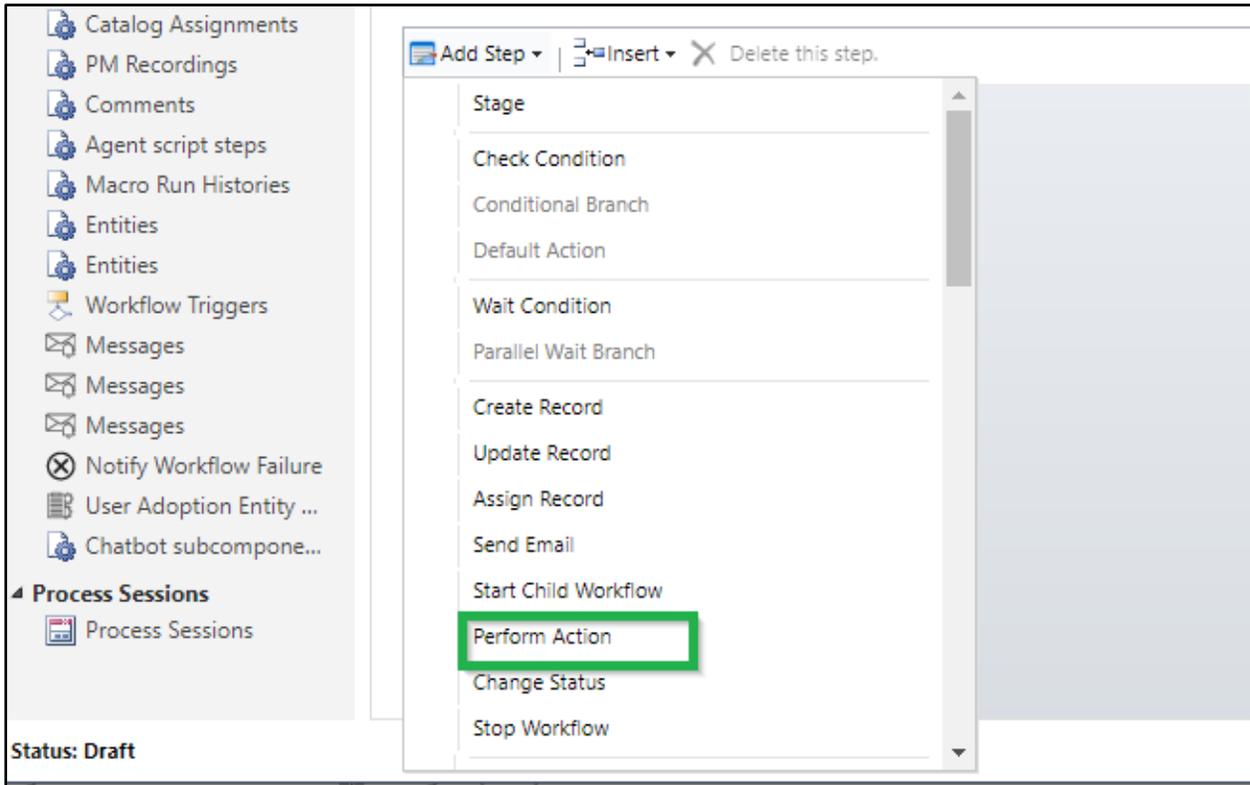
Category

Options for Automatic Processes

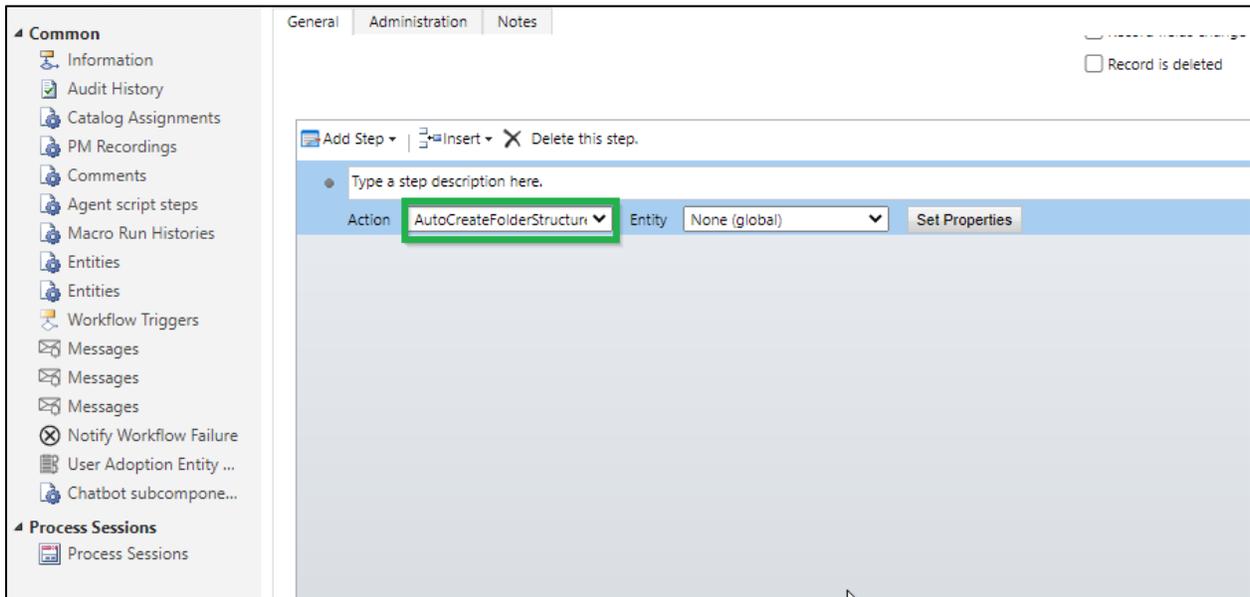
Scope

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

Next, select **Perform Action** step.

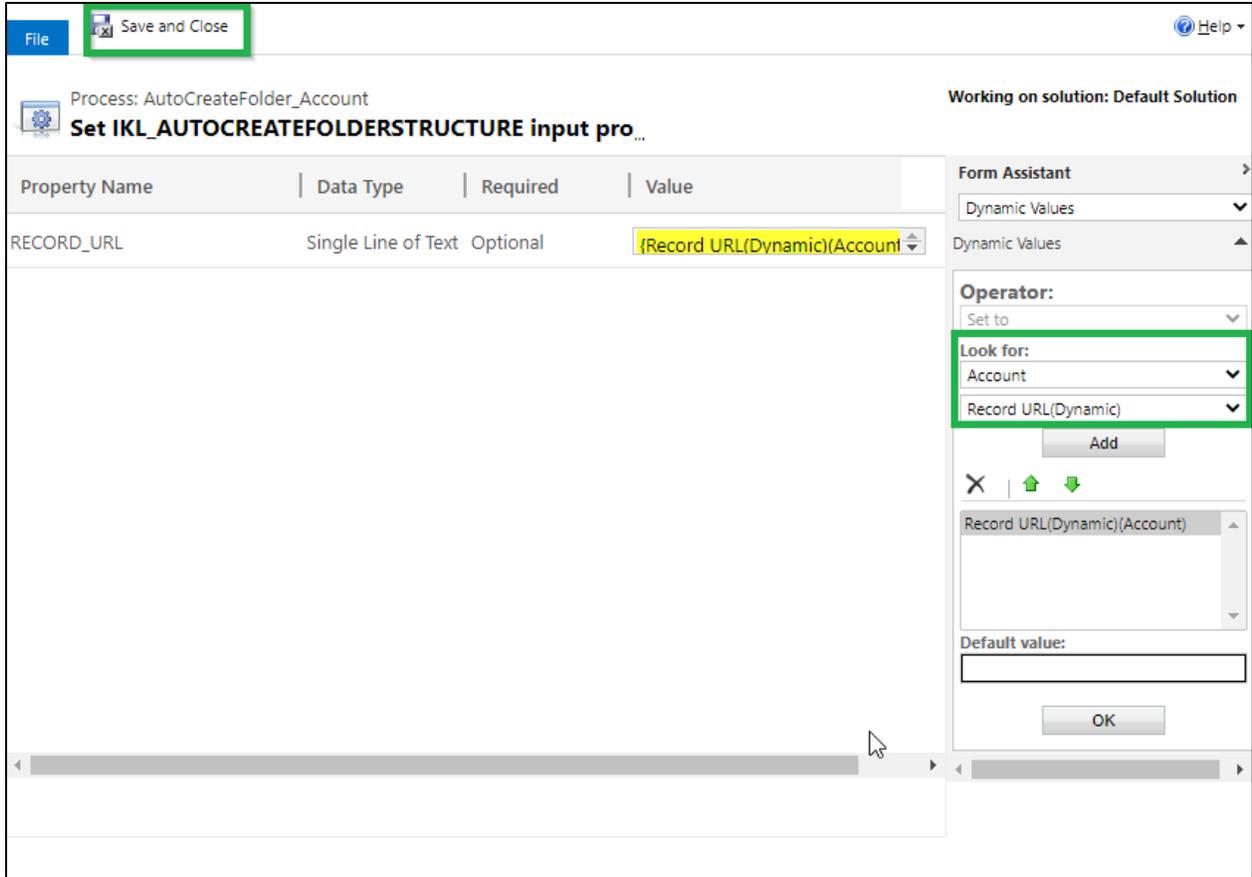


Then from the dropdown select the **AutoCreateFolderStructure** action as shown below:

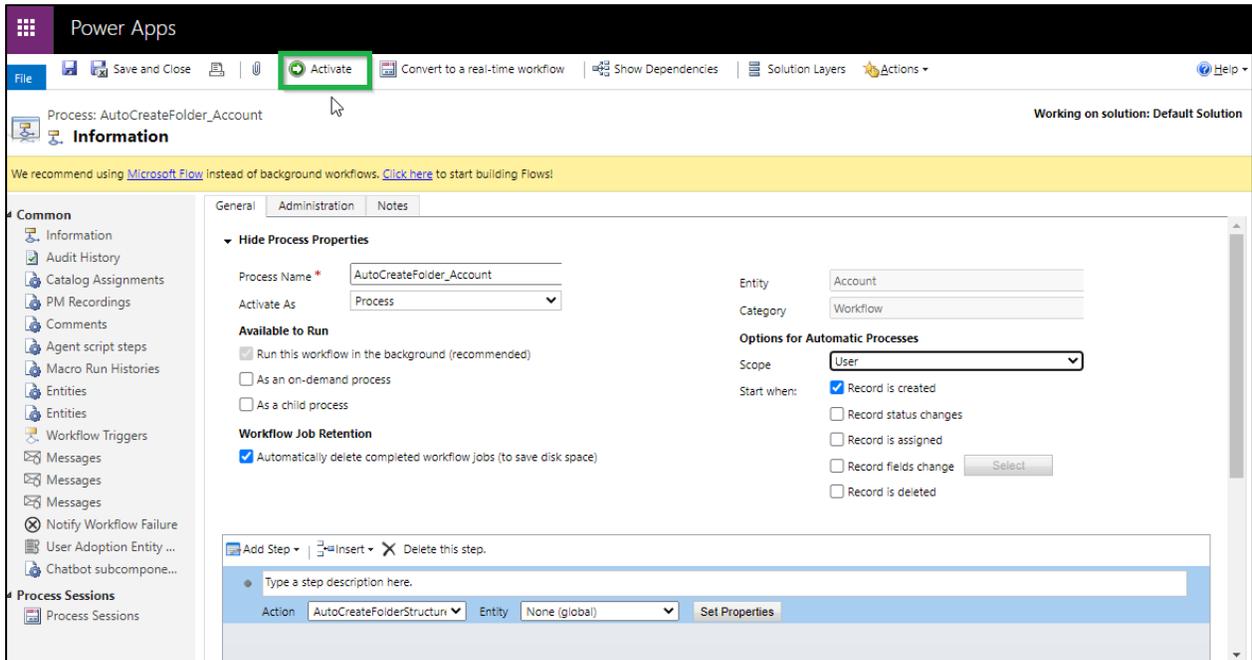


Click on **Set Properties** --> Select **Account** and **Record URL(dynamic)** in the '**Look for**' section --> Click on **Save and Close**.

SharePoint Security Sync – User Manual



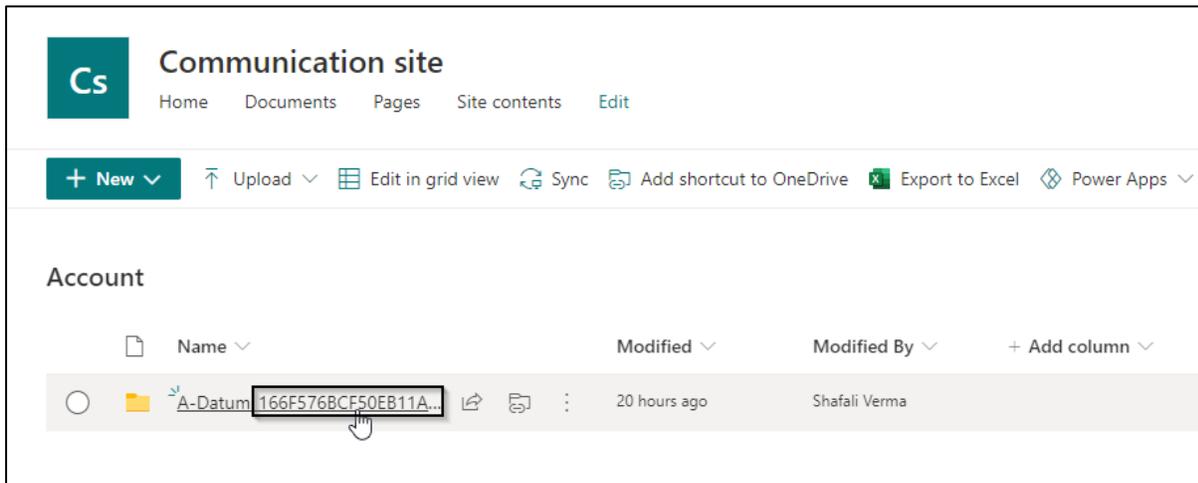
Activate the workflow.



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 tab**.

How to remove GUID?

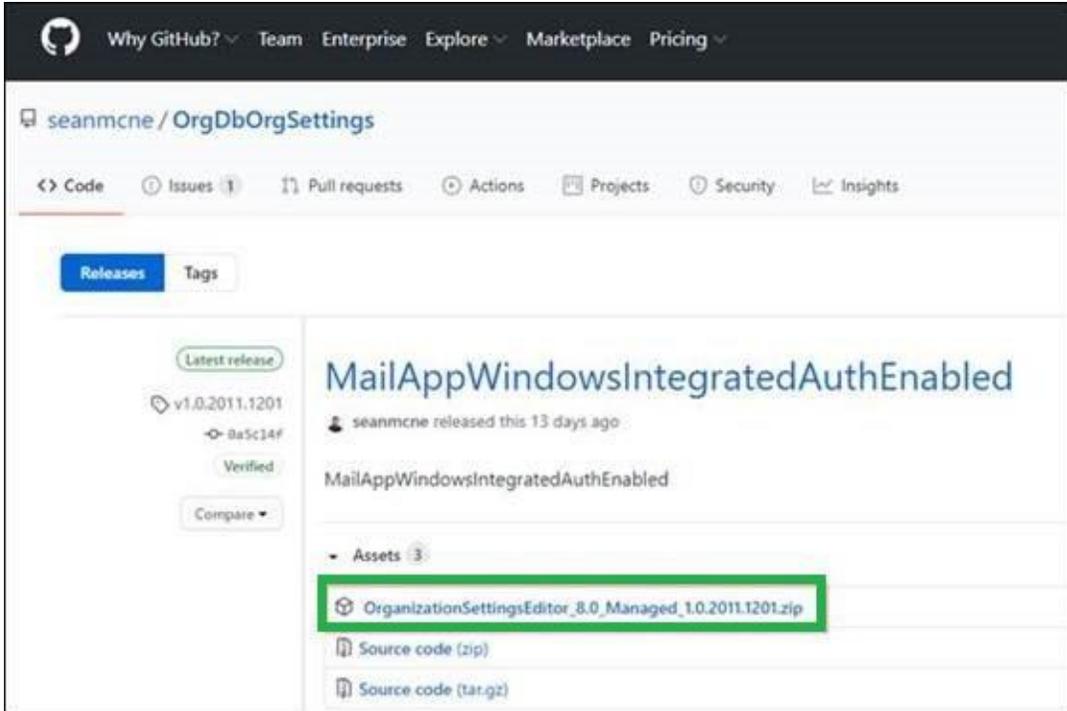
When a document is uploaded to the SharePoint using Attach2Dynamics or using OOB Documents tab in SharePoint, a folder with record name is created in the SharePoint. But along with the name, GUID (Unique ID of the record) is also added in the SharePoint folder name as shown in the below screenshot this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



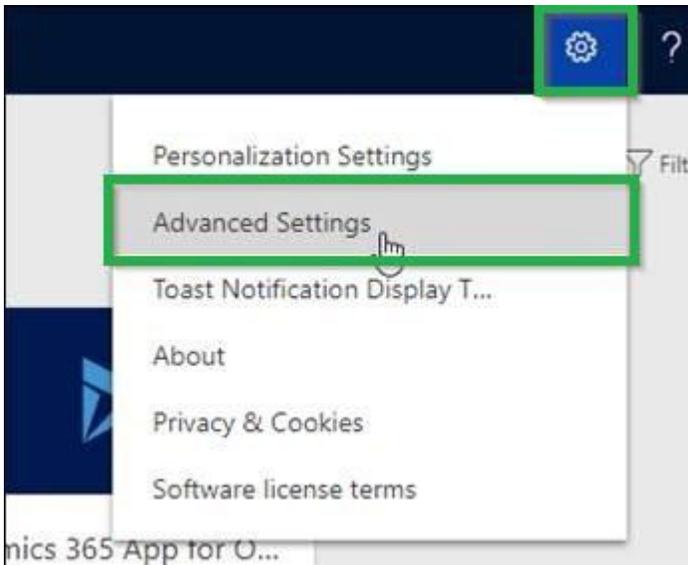
The Appended GUID (Numbers) are irrelevant to the end user.

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

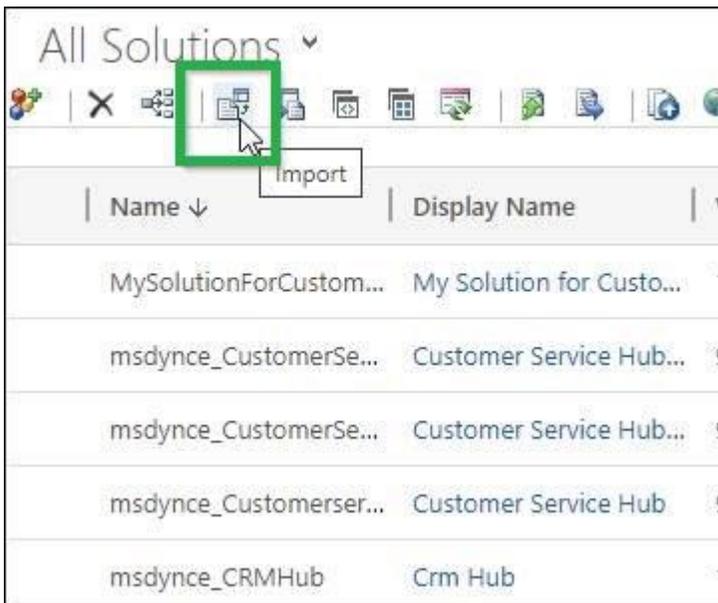
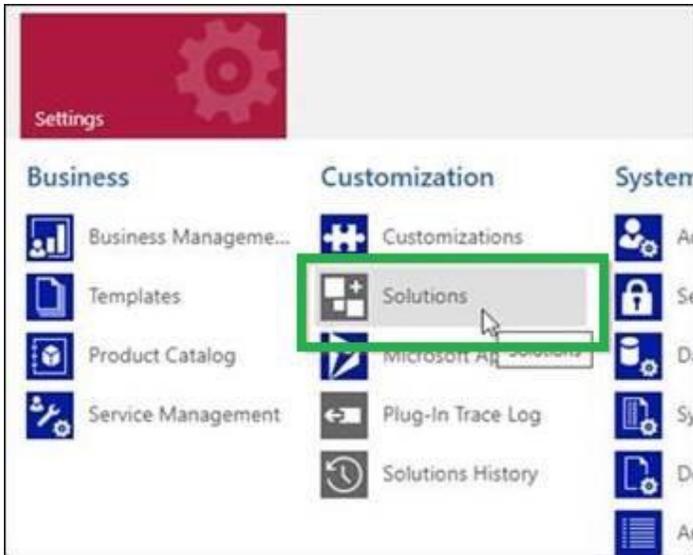
- Navigate to the [link](#) and download the '**OrganizationSettingsEditor**' solution file by clicking on the name as shown in the below screenshot.



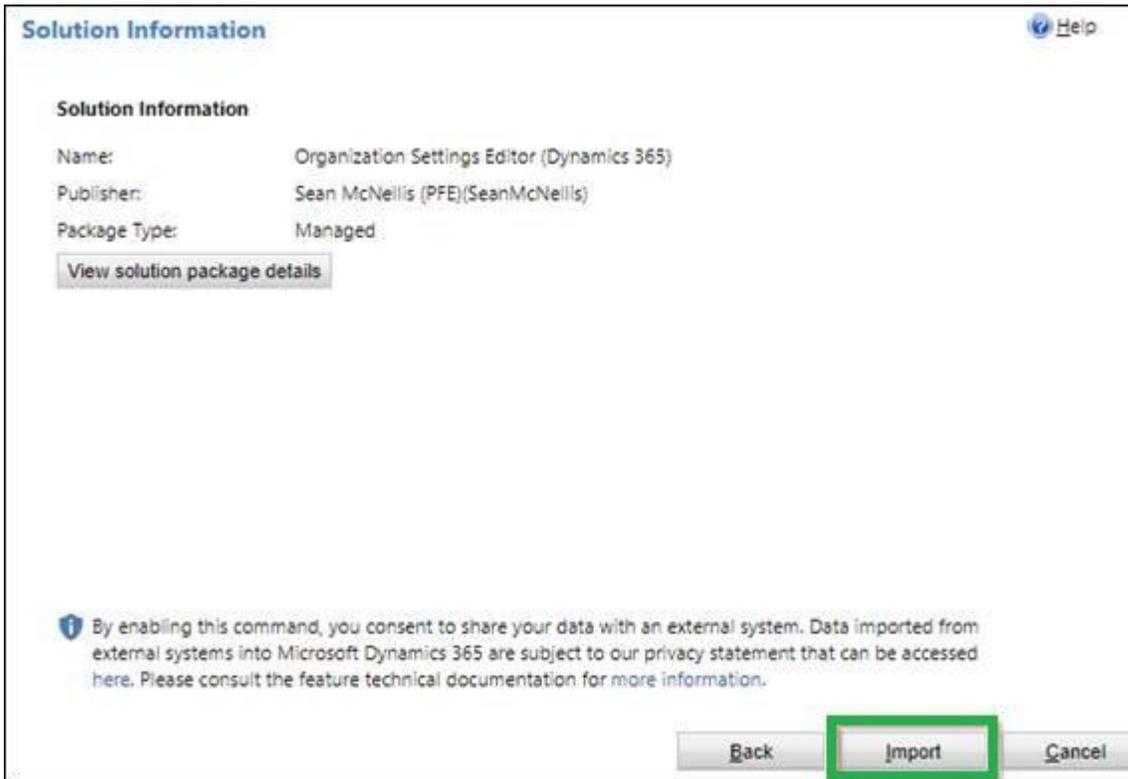
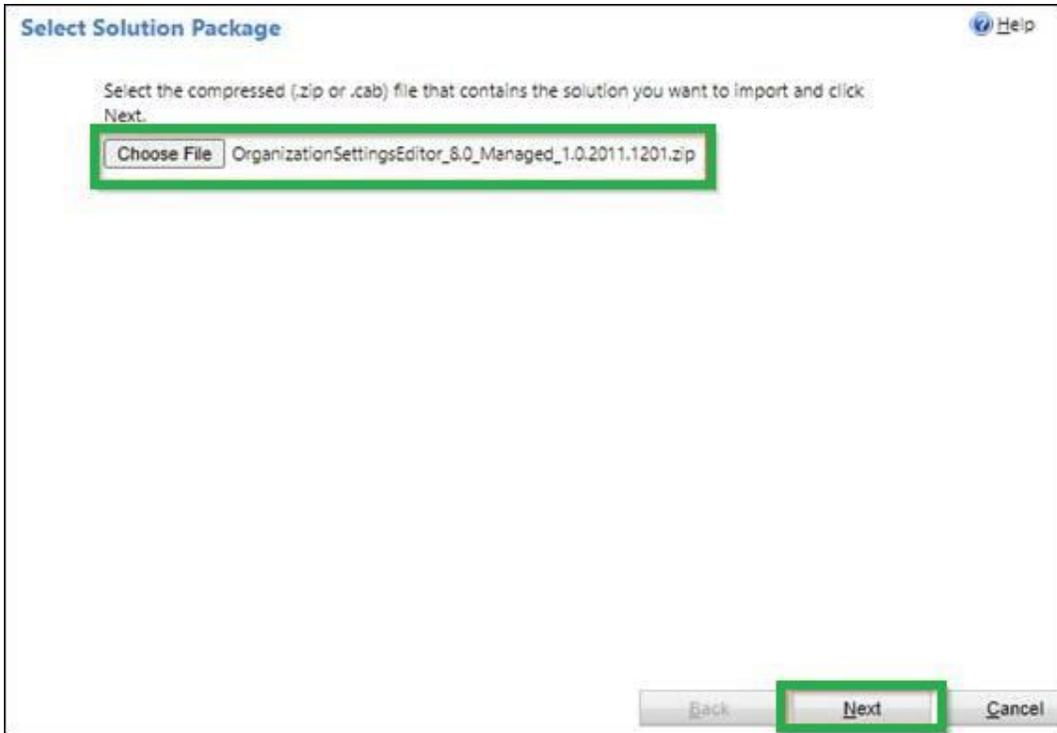
- Once the solution is downloaded, import it into your environment.
- Click on the **gear icon** --> **Select Advanced Settings**.



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



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



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

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Name	Display Name	Version	Installed On	Package T...	Publisher
OrganizationSettingsEditor	Organization Settings Editor (Dynamics 365)	1.0.2011.1201	11/25/2020	Managed	Sean McNellis (PFE)
OmnichannelPrimeOutbound...	Omnichannel – Outbound for Dynamics 365...	1.5.11.815	10/30/2020	Managed	Microsoft Dynamics 365
OmnichannelOutbound	Omnichannel – Outbound	1.5.0.48	10/30/2020	Managed	Microsoft Dynamics 365

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

Solution: Organization Settings Editor (Dynamics 365)

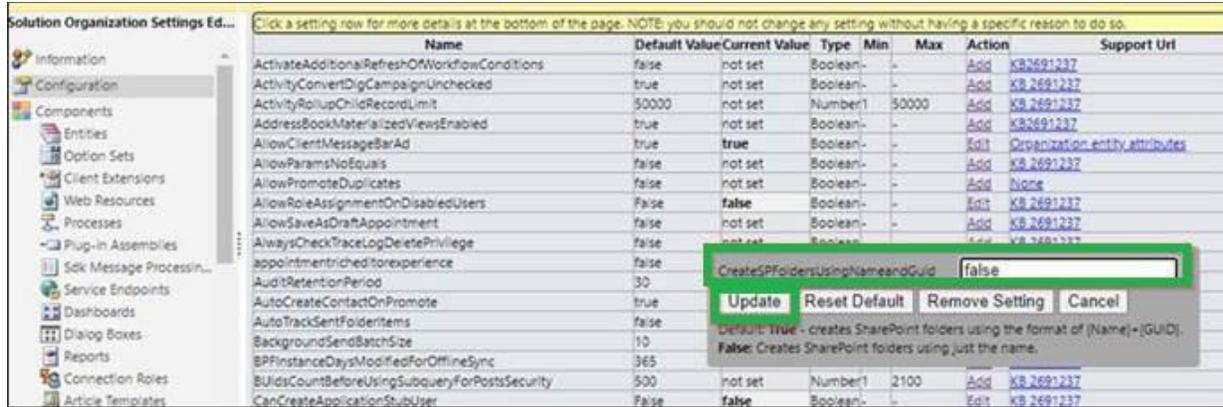
Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the configuration page.

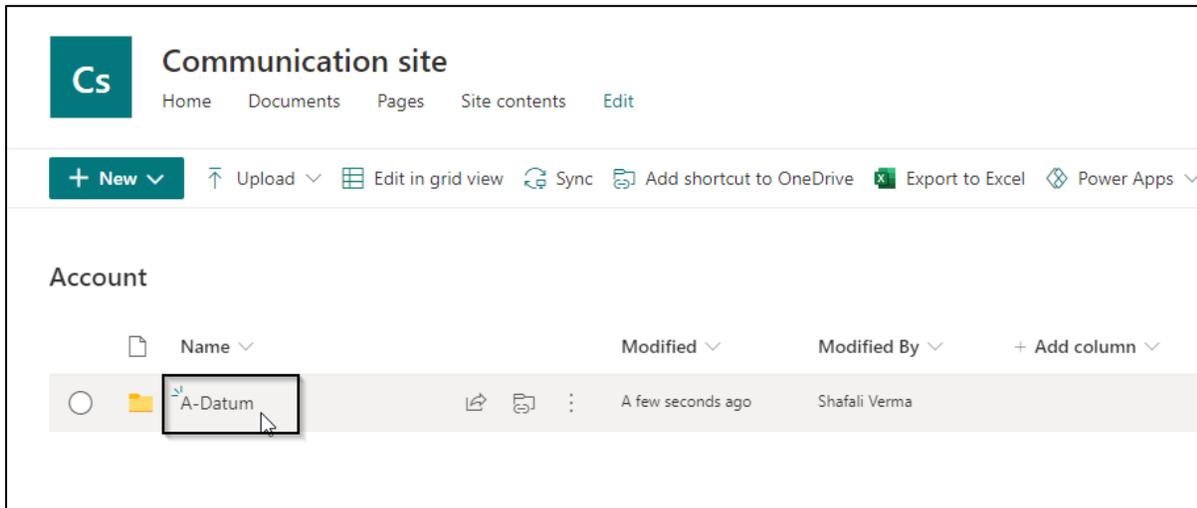
Solution Organization Settings Ed... [Click a setting row for more details at the bottom of the page. NOTE: you should only modify a setting without having a specific reason to](#)

Name	Default Value	Current Value	Type	Min	Max	Action
ActivateAdditionalRefreshOfWorkflowConditions	false	not set	Boolean-	-	-	Add KB 2691237
ActivityConvertDigCampaignUnchecked	true	not set	Boolean-	-	-	Add KB 2691237
ActivityRollupChildRecordLimit	50000	not set	Number1	50000	-	Add KB 2691237
AddressBookMaterializedViewsEnabled	true	not set	Boolean-	-	-	Add KB 2691237
AllowClientMessageBarAd	true	true	Boolean-	-	-	Edit Organization
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
appointmentricheditorexperience	false	false	Boolean-	-	-	Edit Organization
AuditRetentionPeriod	30	30	Number-1	3650	-	Edit KB 2691237
AutoCreateContactOnPromote	true	not set	Boolean-	-	-	Add KB 2691237
AutoTrackSentFolderItems	false	not set	Boolean-	-	-	Add KB 2849744
BackgroundSendBatchSize	10	not set	Number1	255	-	Add KB 2691237
BPFInstanceDaysModifiedForOfflineSync	365	not set	Number0	30	-	Add KB 2691237
BUIDsCountBeforeUsingSubqueryForPostsSecurity	500	not set	Number1	2100	-	Add KB 2691237
CanCreateApplicationStubUser	False	false	Boolean-	-	-	Edit KB 2691237
ChangeDoubleQuoteToSingleQuote	false	not set	Boolean-	-	-	Add KB 2849744
CleanInheritedAccessWhenReparentOrShareCascadingNone	false	not set	Boolean-	-	-	Add KB 2691237
ClearSystemUserPrincipalsWhenDisable	true	not set	Boolean-	-	-	Add KB 2691237
ClientDisableTrackingForReplyForwardEmails	0	not set	Number0	1	-	Add KB 2691237
ClientUEIPDisabled	false	not set	Boolean-	-	-	Add KB 2691237
ClientUEIPDisabled	false	not set	Boolean-	-	-	Add KB 2691237
CreateSPFoldersUsingNameandGuid	true	true	Boolean-	-	-	Edit KB 2691237

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



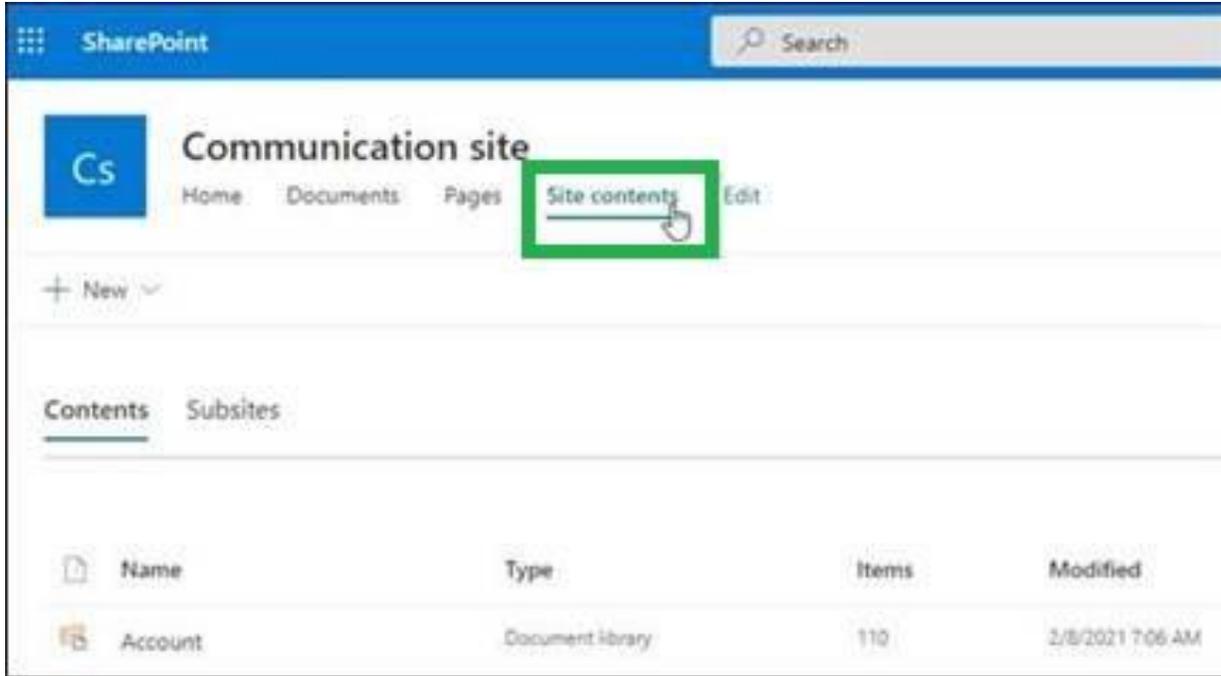
Note: SharePoint Folders created after applying the above settings will be created without GUID, the history folders in SharePoint which are created before the above settings will remain with GUID as shown in the below screenshot.



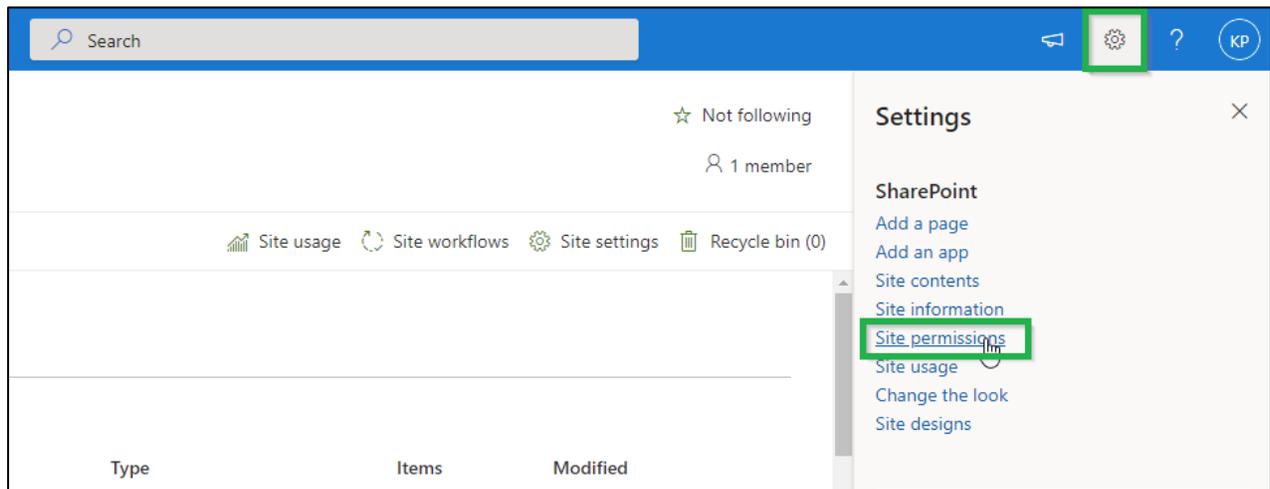
Sharing SharePoint Site

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.

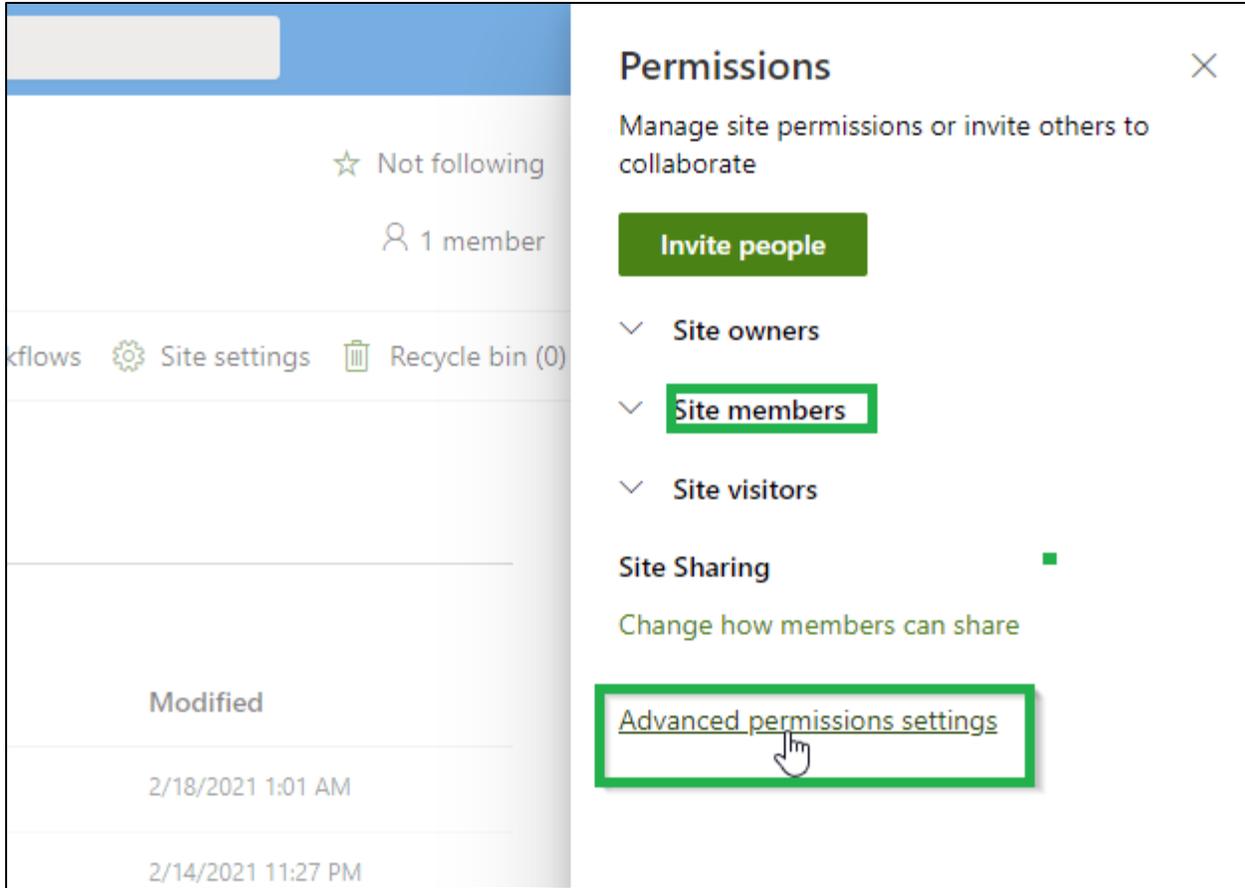
- Open the SharePoint site for which the user doesn't have access --> Click on the Site contents tab.



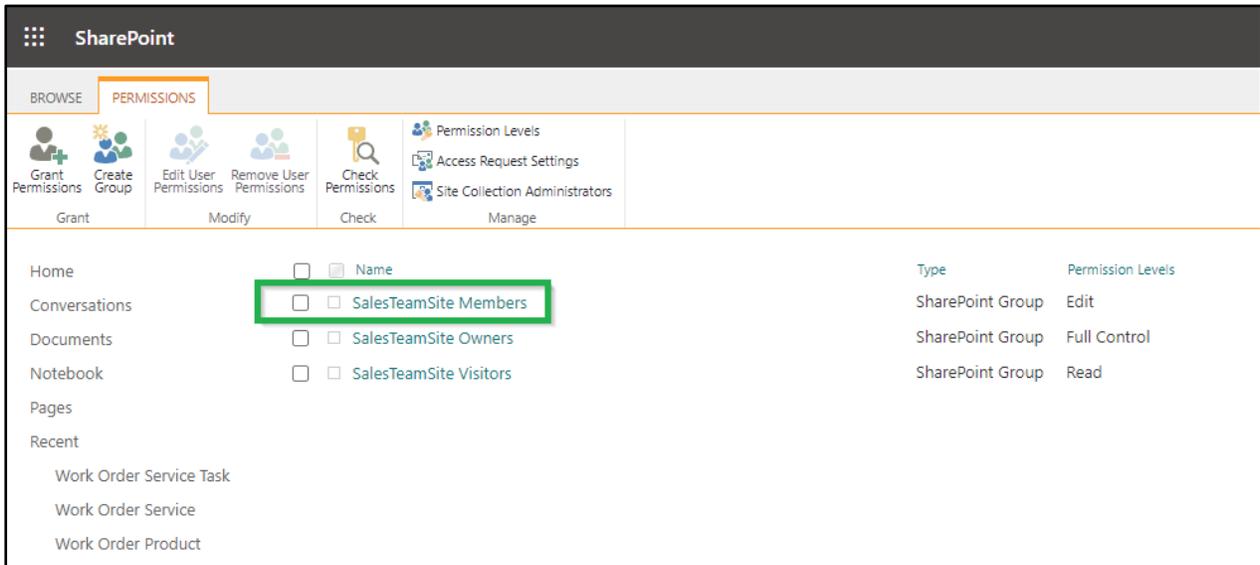
- Click on the Setting button on the top which is highlighted in the below screenshot --> Click on the Site Permissions.



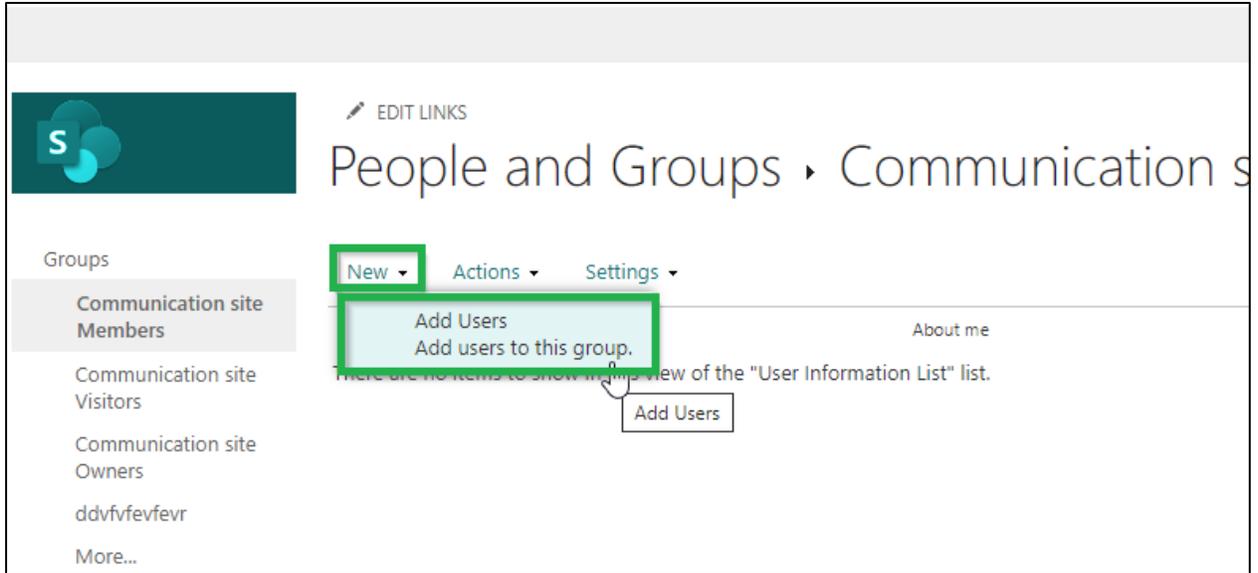
- Next, click on the Advanced permissions settings.



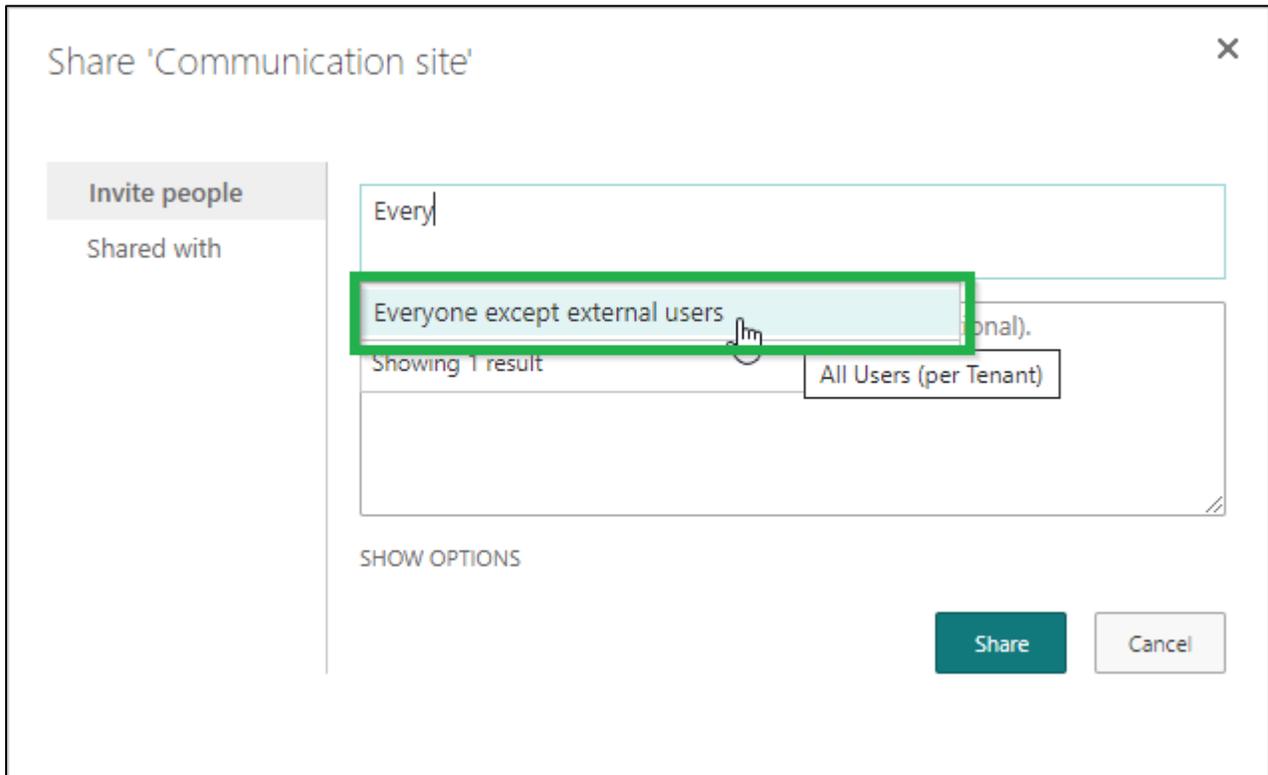
- Now you will find three option from which you need to select the option {YourSiteName} Members.



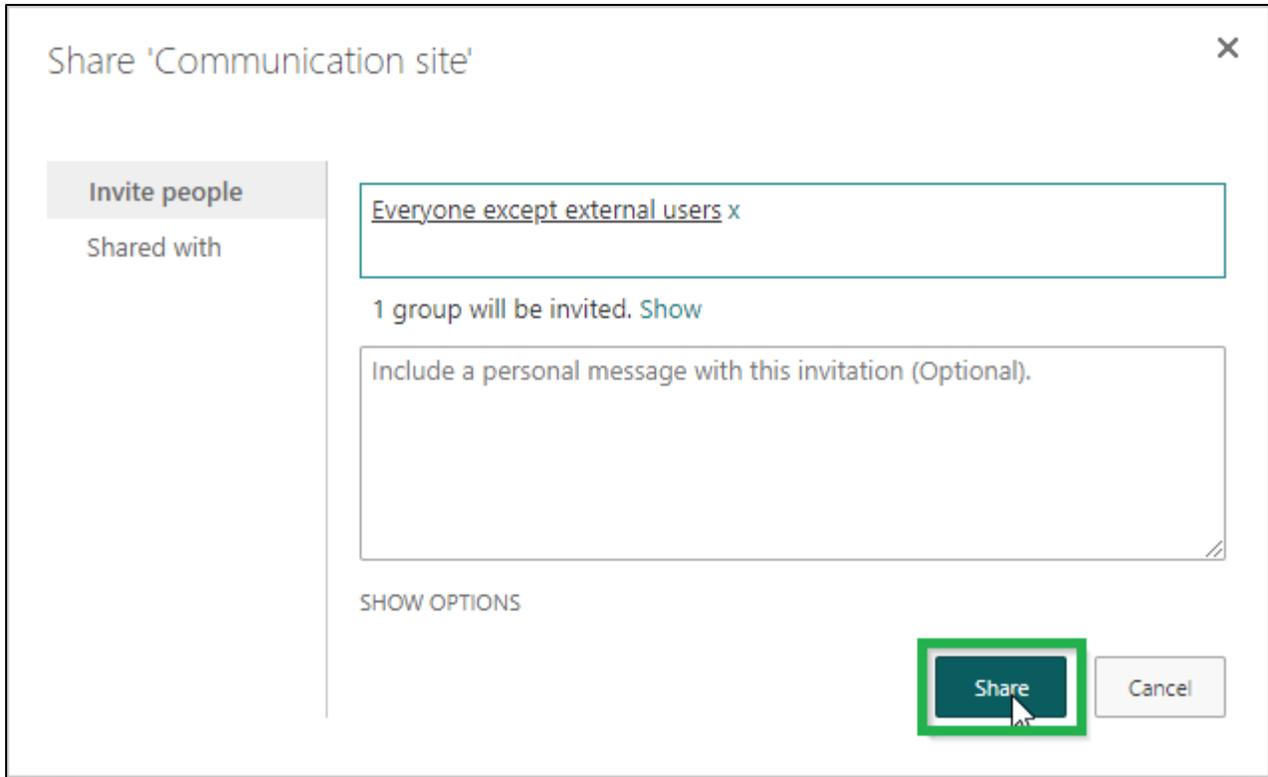
- Click on the New button dropdown --> Select Add Users Add users to this group.



- 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

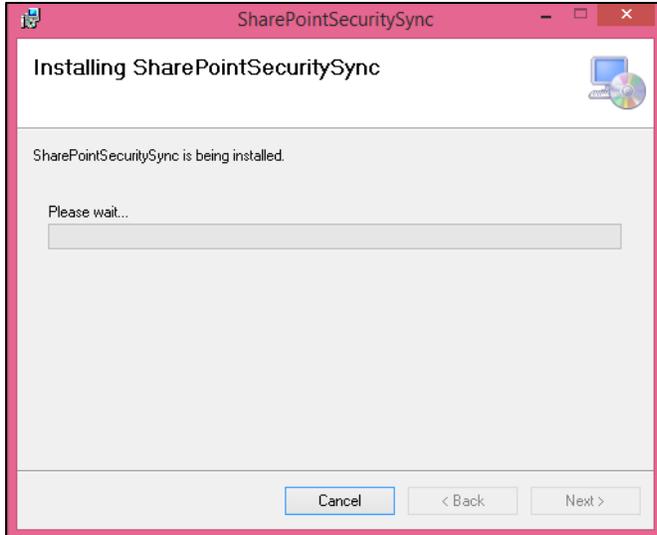
SharePoint Security Sync Tool enables you to sync previous records in bulk. Syncing security privileges for records in bulk is a tedious and time consuming task. In such situation SharePoint Security Sync Tool can be used to carry out this huge task. It relatively takes less time to sync records with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

Pre-requested - .NET Framework 4.6.2 or above.

SharePoint Security Sync Tool Installation

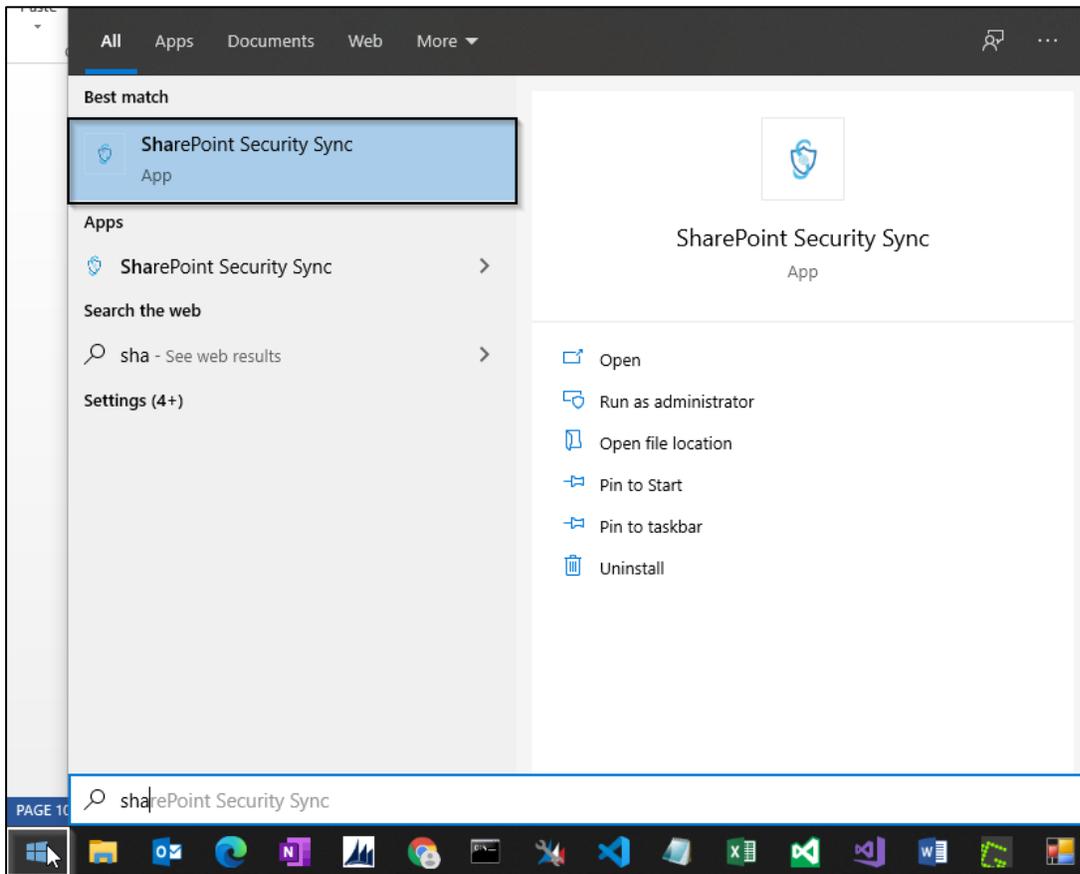
Download and Install SharePoint Security Sync tool in your system.

SharePoint Security Sync – User Manual



After installing the tool, follow the steps given below:

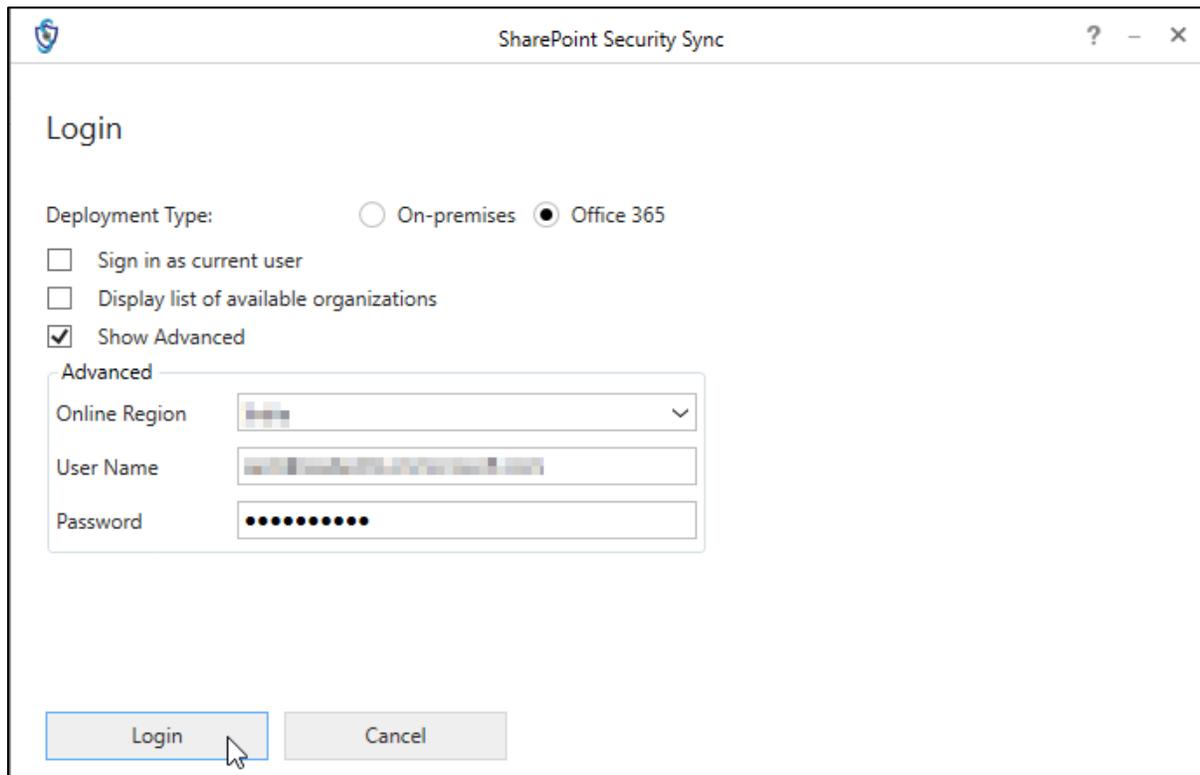
- Click on the SharePoint Security Sync Tool icon to open the tool.



- 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 "Login" dialog box. The dialog box has a title bar with a question mark, minus, and close button. The main content area is titled "Login" and contains the following elements:

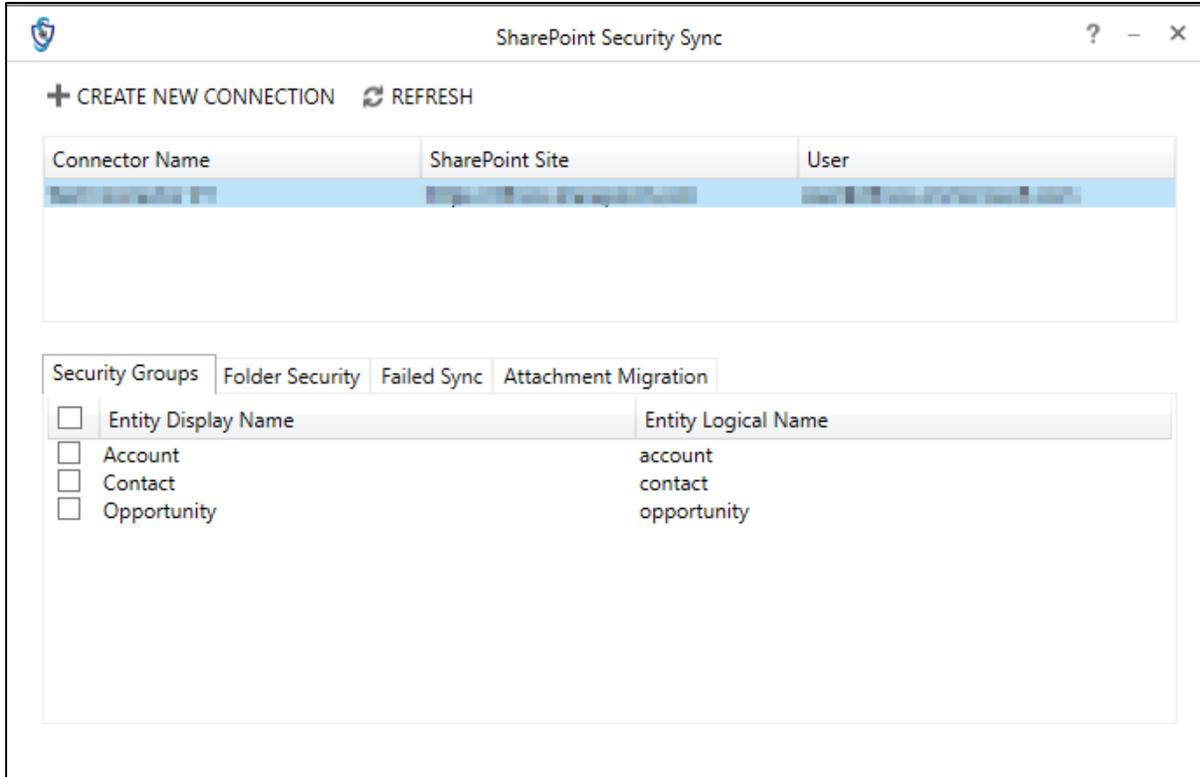
- Deployment Type:** Two radio buttons: "On-premises" (unselected) and "Office 365" (selected).
- Sign in as current user
- Display list of available organizations
- Show Advanced
- Advanced** section (indicated by a dashed line):
 - Online Region:** A dropdown menu with a downward arrow.
 - User Name:** A text input field containing a blurred username.
 - Password:** A password input field with 10 dots.
- At the bottom, there are two buttons: "Login" (highlighted with a mouse cursor) and "Cancel".

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.

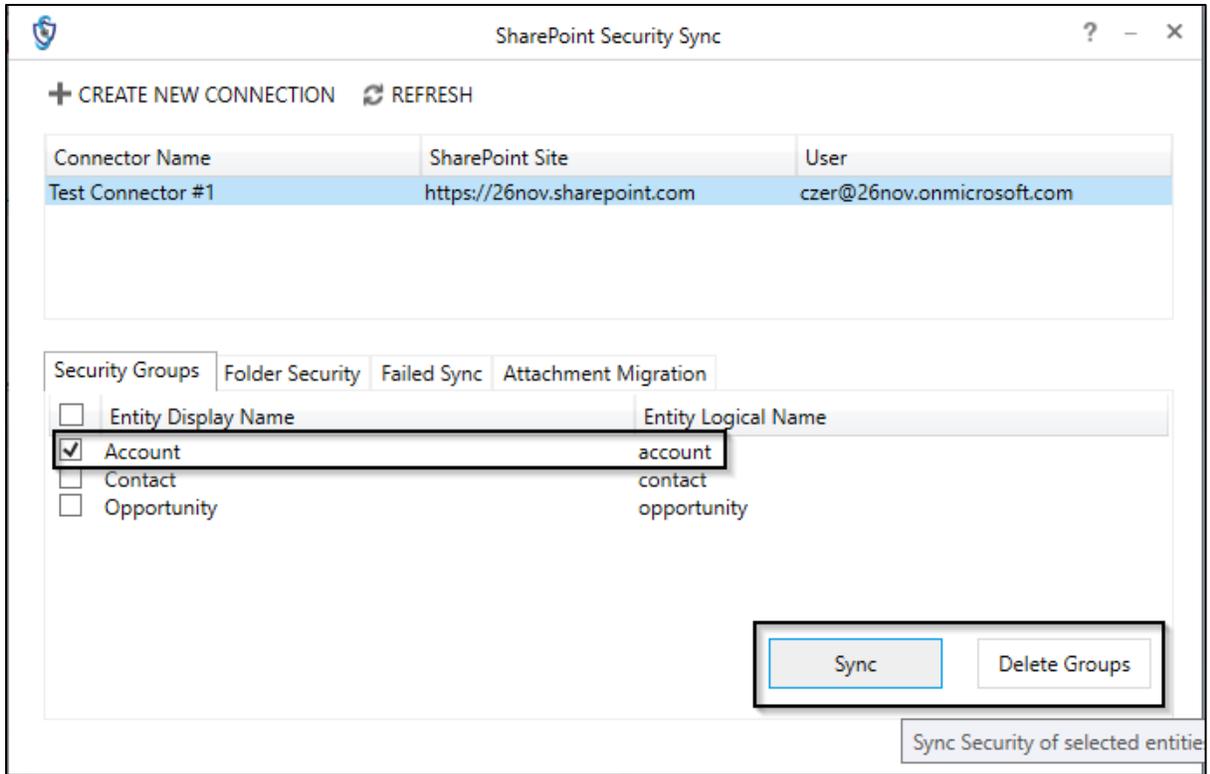
Now let's go through the different functions of SharePoint Security Sync Tool.

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.**

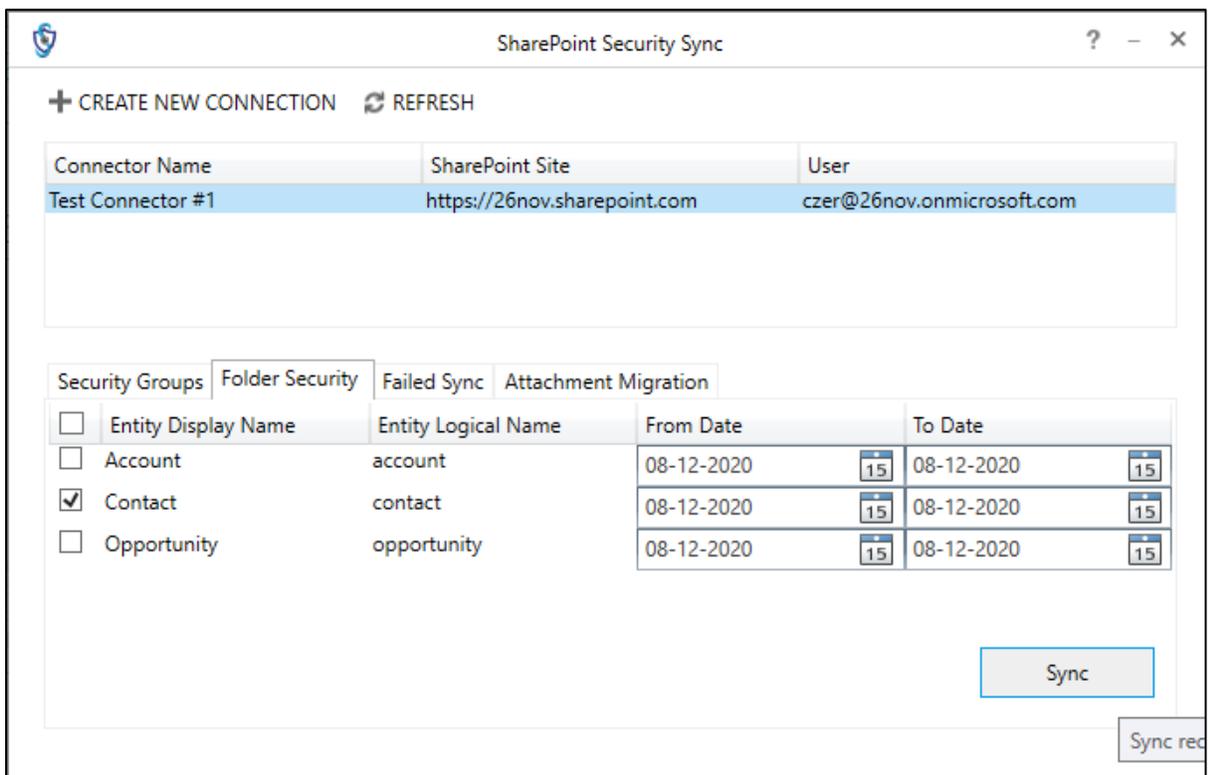


- Now, click on first tab – **Security Groups**. Here, all the existing configured entities will be displayed. Select any entity. After selecting the entity, two buttons will appear – **Sync and Delete Groups**. Click on **'Sync'** button to create groups against that entity. Click on **'Delete Groups'**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

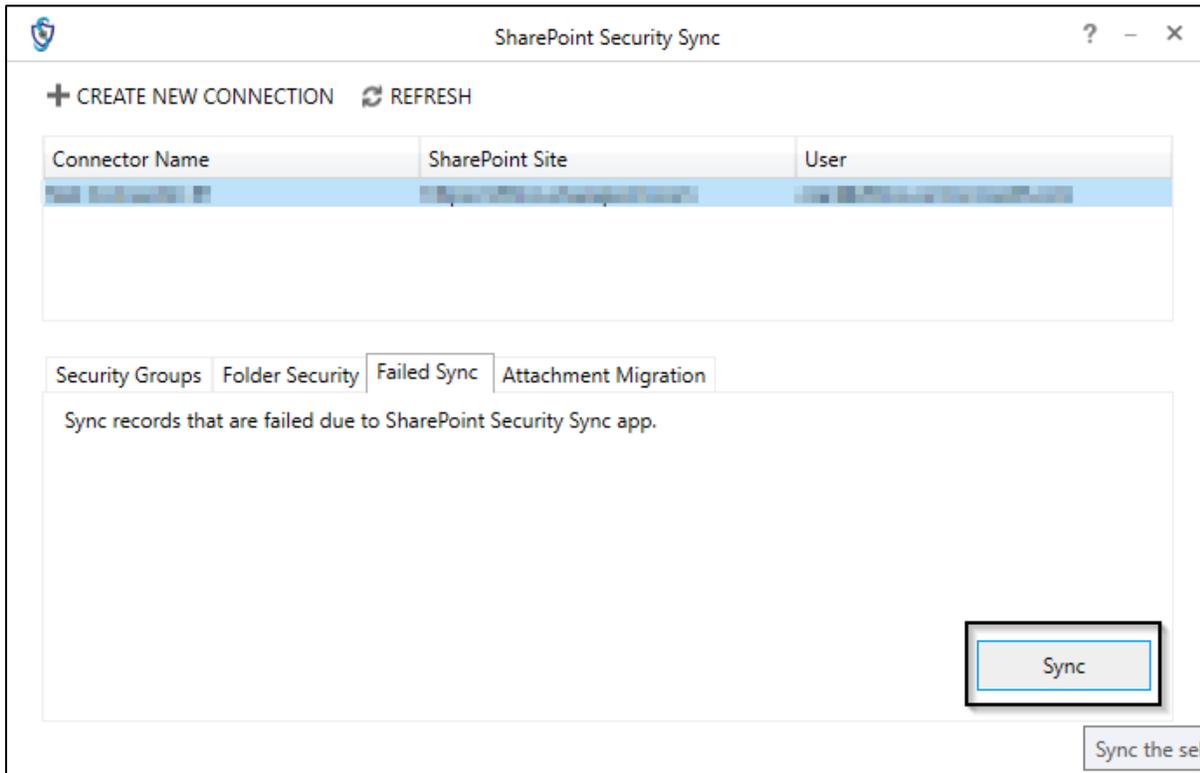
SharePoint Security Sync – User Manual



- Next tab is **Folder Security**. With this tab you can sync/assign records for a selected period of time.



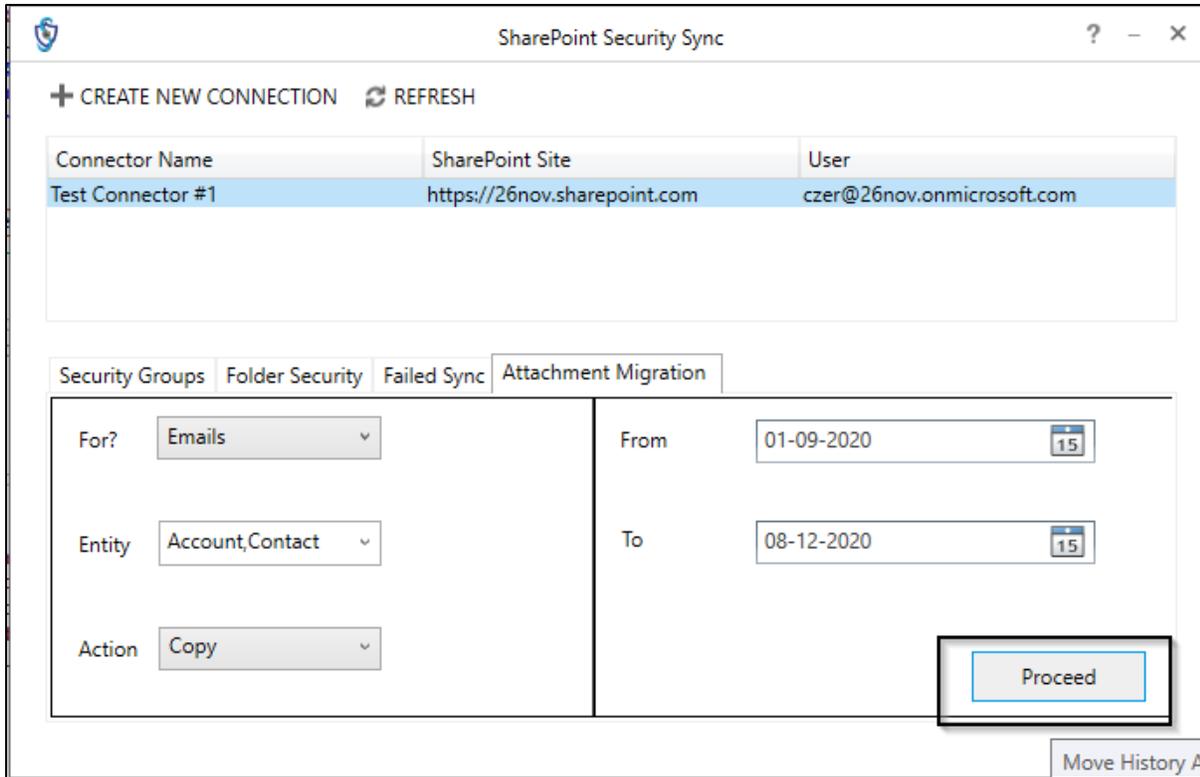
5. The third tab is **Failed Sync**. Click on the **'Sync'** button to sync all the failed records.



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 Emails, 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.

SharePoint Security Sync – User Manual

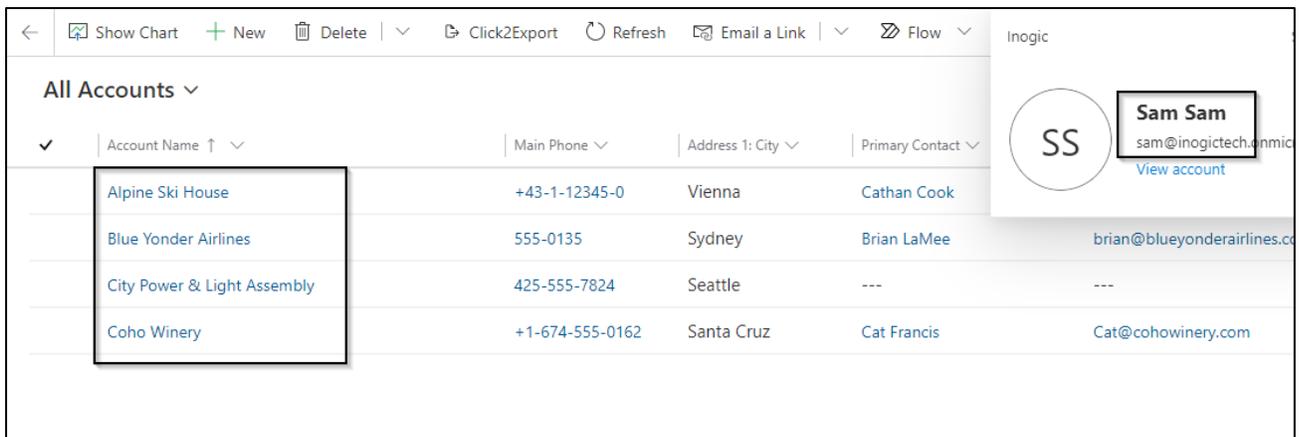


SharePoint Security Sync Use Case

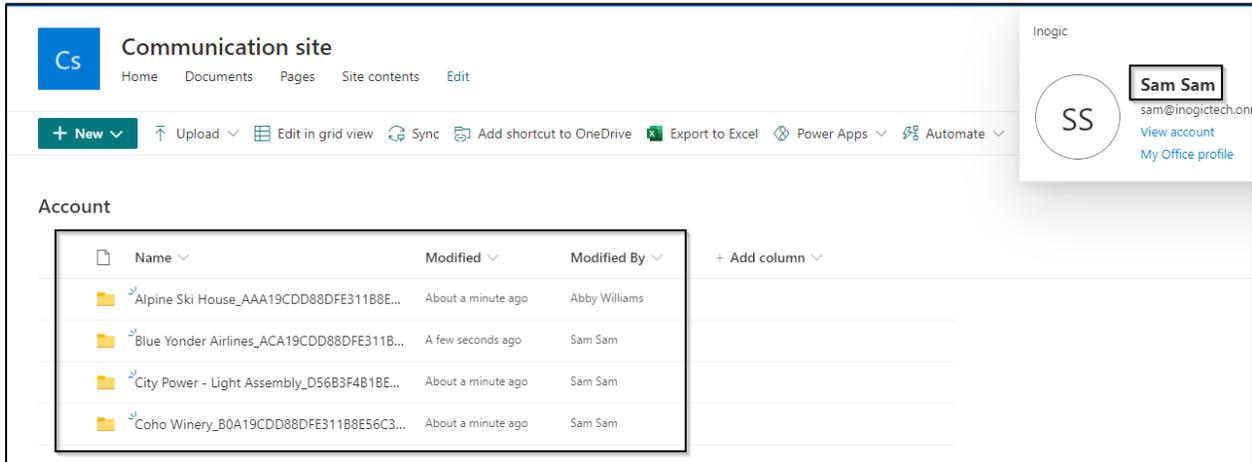
To better understand how SharePoint Security Sync works let's consider a use case.

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:

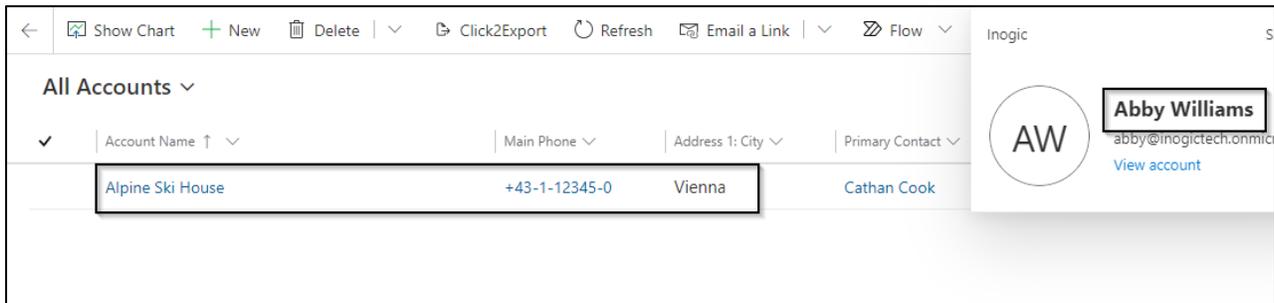


Access in SharePoint:

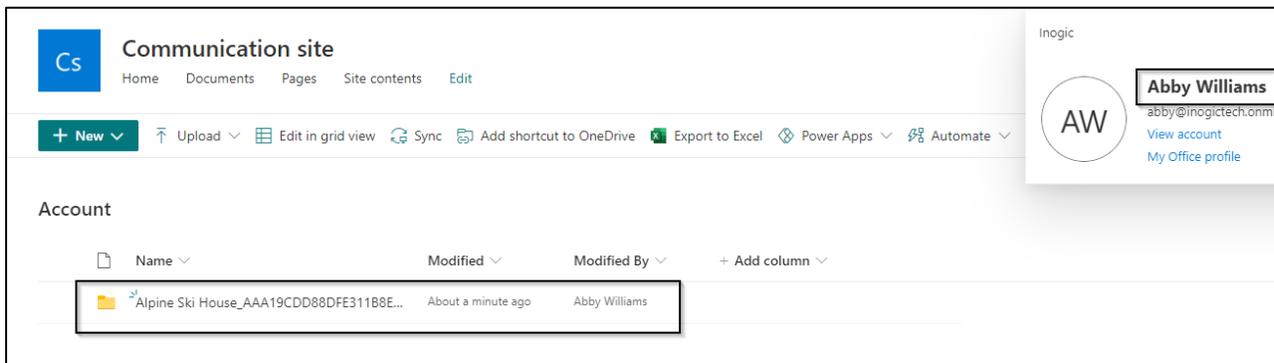


Now User B has only user level access. Here, User B will have access to only those records that are created by him/her.

Access in Dynamics 365 CRM:



Access in SharePoint:



Log

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

Contact Us

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