



White Paper

SharePoint Security Sync - White Paper

Aim:

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.

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
- 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

- If any logged in user uploads or performs any attachment action on SharePoint their name will appear for the action
- Supports all types of entities
- 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 integration with DocuSign 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

Supported Versions

Versions: Microsoft Dynamics 365 8.2 & above, Dataverse (Power Apps). **Deployment Models:** Online.

SharePoint: Online

Who needs it?

Security models of both Dynamics 365 CRM and SharePoint are different. At times, it becomes necessary to restrict access to Dynamics 365 CRM data stored in SharePoint. With SharePoint Security Sync you can safely store and manage documents in SharePoint by replicating Dynamics 365 CRM security privileges in SharePoint.

Configure Connectors

Configure connector to enable syncing with SharePoint security model.

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New Connector

General | Credentials | Additional Settings | Entity Configurations

General

Name * **SharePoint_1**

Connector Type * **SharePoint**

Default Connector ☐

SharePoint Site * **Look for SharePoint Site**

Auth-Type * **App**

Enable DocuSign Integration ☒

+ New SharePoint Site Change View

Support for single sign-on

Perform all actions in the context of logged-in user. For SharePoint connector, when Auth-Type is credential, then for any attachment action the name of that user appears who has authenticated the connector while, when auth-type is App, for any attachment action the name of logged in user appears.

New Connector

General | Credentials | Additional Settings | Entity Configurations

General

Name * **SharePoint_1**

Connector Type * **SharePoint**

Default Connector ☐

SharePoint Site * **Default Site**

Auth-Type * **App**

Enable DocuSign Integration ☒



Entity Configuration

Configure Entities with connector which needs to be given controlled access.

Dynamics 365 | SharePoint Security Sync

Home | Recent | Pinned

SharePoint Security Sync

Connectors

Entity Configurations

Security Templates

Bulk Migration Jobs

Logs

License Registration

account - Sp_Sharepoint - Saved

Entity Configuration

General | Create Custom Folder Structure | Email Configuration | Related

Connector * **Sp_Sharepoint**

Entity Name * **Account**

Attachment Action **Move**

Override Files ☒

Set default from, to, cc and bcc for an email using Email Configuration.

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account - Sp_Sharepoint - Saved
Entity Configuration

General Create Custom Folder Structure Email Configuration Related

From: Me
To: Users
Cc: Team
Bcc: Dynamic

Hierarchy Structure

Store attachments/documents of Dynamics 365 CRM records on the basis of hierarchy in SharePoint.

opportunity - SharePoint Hierarchy
Entity Configuration

General Email Configuration Related

Connector: SharePoint Hierarchy

Entity Name: Opportunity

Attachment Action: Move

Override File: ☐

Folder Structure Field: Account

SharePoint

Communication site

Home Documents Pages Site contents List

Account: Any - Northwind Traders Alpha_C2A19CDD88DFE311B8E56C3BESA6B200

| Name | Modified | Modified By | Add columns |
|-------------------------|----------|-------------|-------------|
| AnonymousLinkImage.aspx | 1/1/2024 | John Doe | |
| AnonymousLinkImage.aspx | 1/1/2024 | John Doe | |
| AnonymousLinkImage.aspx | 1/1/2024 | John Doe | |

Custom Folder Structure

Create customized folder structure in SharePoint to store and manage attachments easily.

account - Sp_Sharepoint - Saved
Entity Configuration

General Create Custom Folder Structure Email Configuration Related

Create Library Structure

Library structure: Custom

Document Library Format: {preferredcontactmethodcode}

Create Record Folder Structure

Folder Format: {name} Alpha

SharePoint

Communication site

Home Documents Pages Site contents List

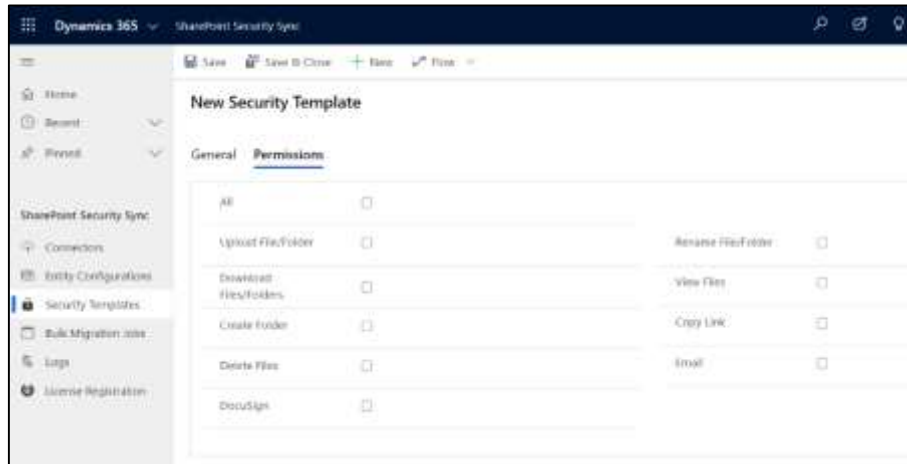
Account: Any - Northwind Traders Alpha_C2A19CDD88DFE311B8E56C3BESA6B200

| Name | Modified | Modified By | Add columns |
|------|----------|-------------|-------------|
|------|----------|-------------|-------------|

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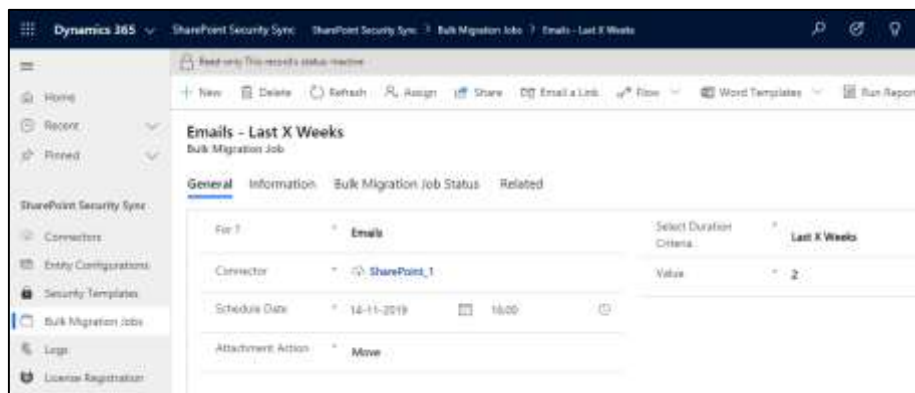
Security Templates

Restrict user actions over various features of Attach2Dynamics such as Upload, Download, Email, Create Folder, Delete, etc.



Bulk Migration Job

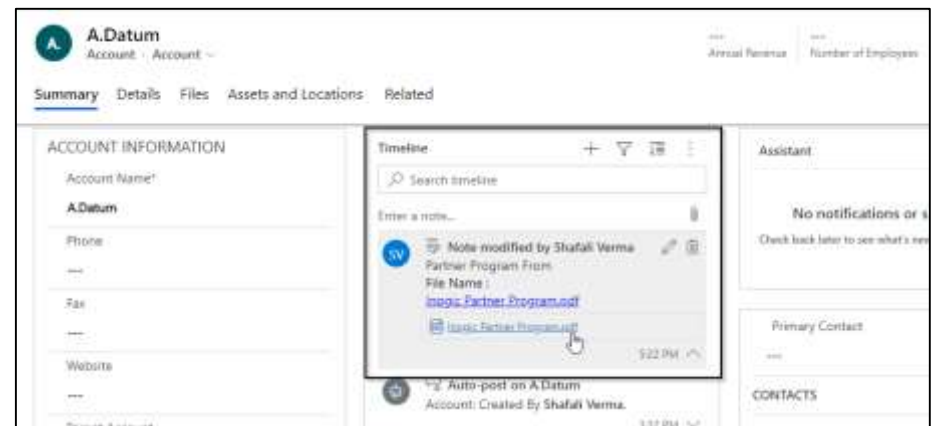
Migrate documents/history data for an estimated period in bulk from Dynamics 365 CRM to SharePoint.



| Emails - Last X Weeks | | | |
|---|------------------|---------------------------|------------------|
| Bulk Migration Job | | | |
| General Information Bulk Migration Job Status Related | | | |
| Total Records Processed | 0 | | |
| Last updated: | 14-11-2019 15:36 | | |
| Total Succeeded Records | 0 | Total Succeeded Size (KB) | 0.00 |
| Last updated: | 14-11-2019 15:36 | Last updated: | 14-11-2019 15:36 |
| Total Ignored Records | 0 | Total Ignored Size (KB) | 0.00 |
| Last updated: | 14-11-2019 15:36 | Last updated: | 14-11-2019 15:36 |
| Total Failed Records | 0 | Total Failed Size (KB) | 0.00 |
| Last updated: | 14-11-2019 15:36 | Last updated: | 14-11-2019 15:36 |

Move/Copy Attachments

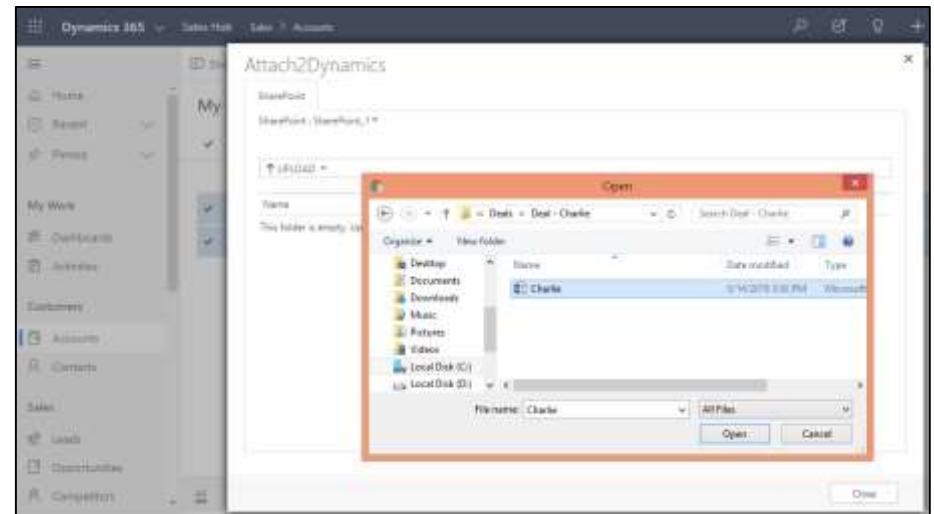
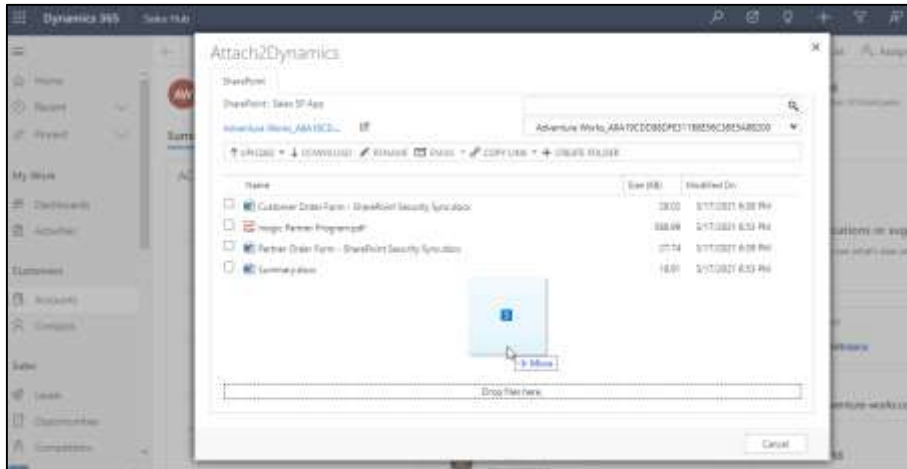
Move/Copy Dynamics 365 CRM Notes/Email/Sales Literature Attachments to SharePoint.



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Drag & Drop

Drag and Drop files/folders through the Attach2Dynamics UI.

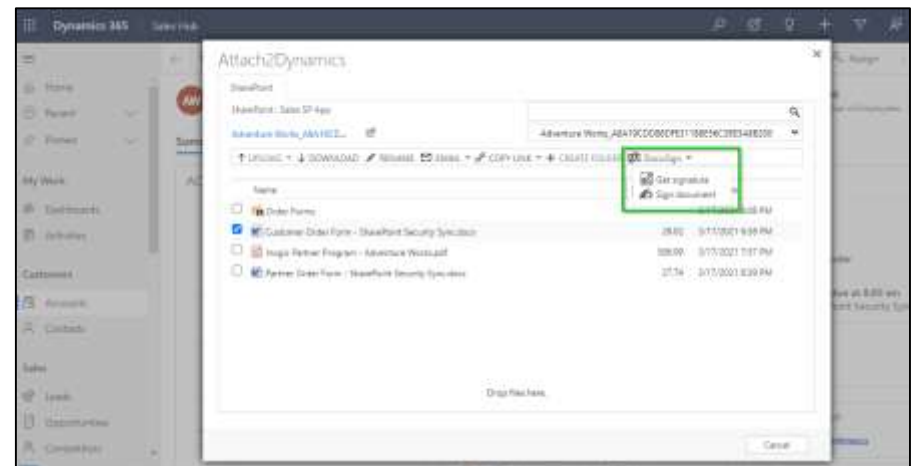
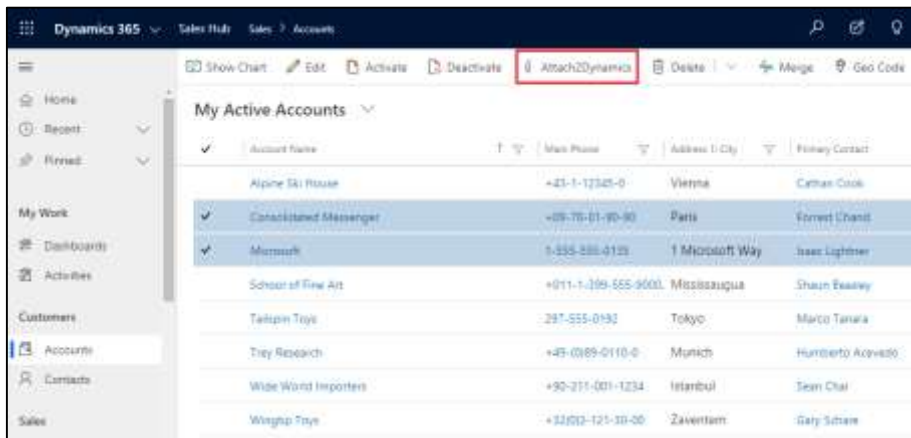


DocuSign Integration

Use DocuSign to electronically sign documents stored in SharePoint.

Direct Upload of files from Home Page

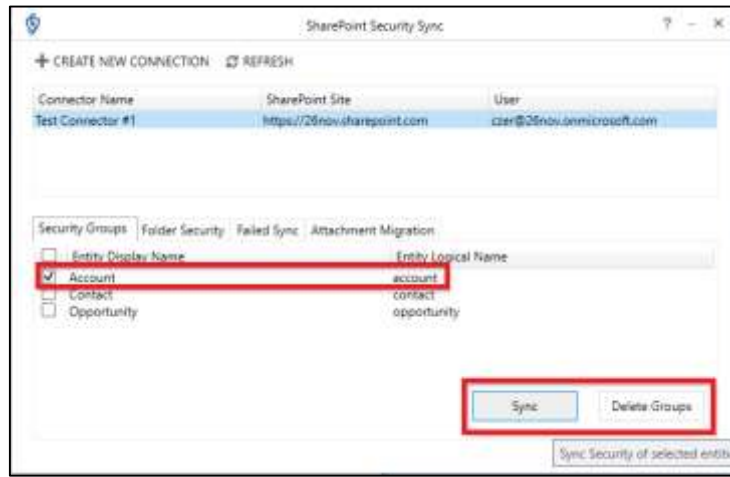
Upload files directly from home page for selected records.



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SharePoint Security Sync Tool

Use SharePoint Security Sync tool to sync security privileges on a large scale with ease.



Sync Details of User with User Level Privilege

Sync the visibility of records visible in Dynamics 365 to SharePoint.



Download & Upload

Download & Upload files/folders through the UI directly into SharePoint.

Deep Search Tab

Search for files/folders within subfolders by entering keyword in search tab.

Email

Email anonymous link (of a file/folder) or file as an attachment.

Create folder

Create folders in SharePoint as per requirement.

Rename

Rename files/folders in SharePoint.

Copy a Link

Copy and share generated link as per requirement.

Delete

Delete unwanted files from SharePoint.

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View Files

Preview files stored in SharePoint before downloading.

Open Folder

Open record folder present on SharePoint site directly from Attach2Dynamics document management UI.

Log

View 'Log' entity for errors occurred during the functioning of SharePoint Security Sync.

Contact Us:

INOGIC (MUMBAI - INDIA)

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

Twitter: @inogic