

Microsoft Dynamics 365

Document Management Accelerator

We believe that

When Dynamics 365 and Velrada's Document Management are seamlessly integrated, they create a comprehensive information platform that is essential for better decision making.



Advanced Document Management for Dynamics 365



Velrada's **Advanced Document Management Solution** for Dynamics 365 helps organisation to overcome the limitations of out-of-the-box functionalities through advanced metadata management, automated workflows, and sophisticated search capabilities, ensuring efficient and secure handling of large volumes of documents.

With comprehensive compliance features, detailed audit trails, and scalable architecture, the solution is tailored to meet the specific needs of organisations, optimizing productivity and fostering seamless collaboration across teams.

Key benefits include:

- **Scalable architecture** to handle growth and overcome SharePoint limitations.
- **Attachment management** offers a cost-effective storage solution in SharePoint Online, allowing the organisation to utilize SharePoint's advanced document management features, including search capabilities, compliance, and Microsoft Copilot for M365.
- Automatically **inherit key information** from Dynamics 365 records or predefined **metadata** based on the document locations.
- **Well defined information structure** that better fits your organizational needs, simplifying navigation and document retrieval processes .
- Multiple users can collaborate on documents in real-time, and you can easily share documents with customers and partners, **Improving collaboration and teamwork.**
- **Increased productivity and efficiency** through advanced search capability and interface.
- Prepare for future **compliance** needs and **integration with Copilot**, with metadata already associated with documents.

Solution Overview

7. Compliance

Protect sensitive documents through Information Protection and Data Loss Prevention. Configure retention and disposal policies to ensure documents are kept up-to-date and compliant.

5. Advanced Search

Enhance the D365 in-place document search experience to find relevant documents based on Dynamics 365 record metadata. Easily access documents associated with corresponding records.

3. Metadata

Automatically Inherit key metadata values from Dynamics 365 records, or default metadata based on where the documents are stored.

1. Document Location Structure

Design and implement document library structure that aligns closely with business needs, offers greater scalability, and efficiently manages large volumes of documents without performance implications.



6. Security

Synchronizes Dynamics 365 privileges with SharePoint permissions, thereby safeguarding data access and protecting confidential information.

4. Document Migration

Migrate documents from source system to SharePoint Online in a scalable structure. Link corresponding Dynamics 365 records to new document locations

2. Attachment Management

Using custom flows to capture attachment from emails, and notes and migrate into a structured document location in SharePoint Online, ensuring the attachments can be accessible from the original record.

Service Approach

Discovery & Assessment

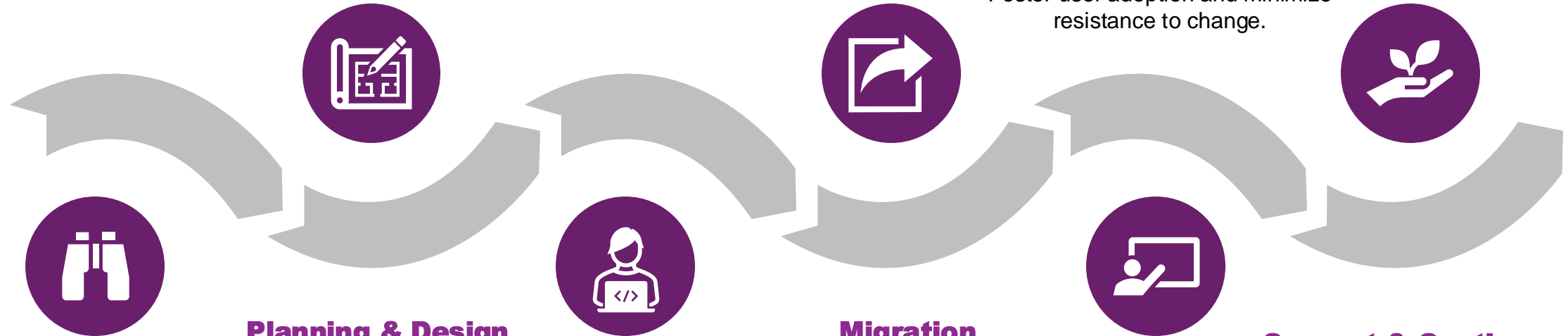
Understand the organization's current systems, pain points, and requirements.

Build & Configure

Build Advanced document management solution to align with the business requirements

Training & Adoption

Equip users with the knowledge and skills to effectively use the new document management solution. Foster user adoption and minimize resistance to change.



Planning & Design

Design the document management architecture tailored to the organization's needs.

Migration

Ensure a smooth transition of existing documents into the new system.
Maintain data integrity and security during the migration process.

Support & Continuous Improvement

Ensure long-term success and continuous improvement of the document management solution.

Advanced Dynamics 365 Document Management Solution Offering

| FEATURES | Basic 2 - 4 WEEKS* | Standard 4 - 6 WEEKS* | Enterprise 6 - 8 WEEKS* |
|--|---------------------------------|---------------------------------|-----------------------------------|
| Doc Location Structure | Up to 5 x Dynamics 365 Entities | Up to 10x Dynamics 365 Entities | Over 10x Dynamics 365 Entities |
| Security Alignment | ☑ | ☑ | ☑ |
| Attachment Management | | ☑ | ☑ |
| Dynamics 365 Metadata Sync | | ☑ | ☑ |
| Custom Document Uploader | | ☑ | ☑ |
| Advanced Search | | ☑ | ☑ |
| Compliance - Retention & Disposal | | | ☑ |
| Compliance - Information Protection | | | ☑ |
| Compliance – Data Loss Prevention (DLP) | | | ☑ |
| Training | Basic | Standard | Advanced |

Dynamics 365 Document Migration Offering

Small

The small migration Service is designed for small businesses looking to transition smoothly from SharePoint (both on-premises and online) to a more flexible and scalable environment.

Ideal for organizations with up to 500GB of data, this service ensures a straightforward and efficient migration process, retaining essential file metadata such as filename, created date, and created by.

4 weeks*

Medium

The medium migration Service is tailored for businesses needing to migrate up to 1TB of data from SharePoint on-premises, file shares, or SharePoint Online to a new and scalable SharePoint Online environment.

This service includes the transfer of all custom metadata, ensuring a smooth and organized transition that maintains the integrity of your data while enabling you to fully leverage the scalability and advanced features of SharePoint Online.

4-8 weeks*

Large

The large migration Service is designed for businesses with extensive data needs, offering migration of over 1TB of data from other LOB systems such as SharePoint on-premises/online, file shares, or third-party data sources to a scalable SharePoint Online environment.

This comprehensive service includes mapping and automatically tagging custom metadata to your files during migration, ensuring an organized and efficient transition that maximizes the potential of your new SharePoint Online environment.

From 8 weeks*