



**White Paper**

## SharePoint Security Sync - White Paper

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### Aim:

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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.

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### Features:

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- 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 structures in SharePoint
- Thumbnail View and List View on Attach2Dynamics UI
- Attach Files of Various Records Directly from Email Form

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### Supported Versions

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**Versions:** Microsoft Dynamics 365 CRM 9.1 & above, Dataverse (Power Apps).

**Deployment Models:** Online.

**SharePoint:** Online

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### Who needs it?

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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.

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## Configure Connectors

Configure connector to enable syncing with SharePoint security model.

**New Connector** - Unsaved

General | Credentials | Additional Settings | Entity Configurations

General

Name \* **SharePoint\_1**

Connector Type \* **SharePoint**

Default Connector

SharePoint Site \*

Auth-Type \*   
+ New SharePoint Site

## 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

SharePoint | Search this library

Communication site | Home | Documents | Pages | Site contents | Edit | Not following | Share

+ New | Upload | Edit in grid view | Share | Copy link | Sync | Download | Add shortcut to OneDrive | All Documents\*

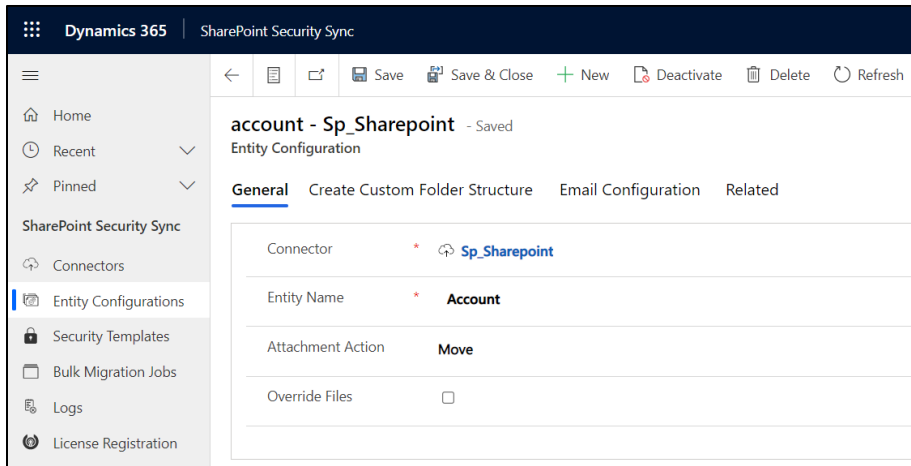
Account > Adventure Works\_A8A19CDD88DFE311B8E56C3BE5A8B200

Name	Modified	Modified By	
Inogic Partner Program.pdf	A few seconds ago	Veronica V	
Summary.docx	About a minute ago	Veronica V	
Customer Order Form - SharePoint Security...	15 minutes ago	John David	
Partner Order Form - SharePoint Security Sy...	15 minutes ago	John David	

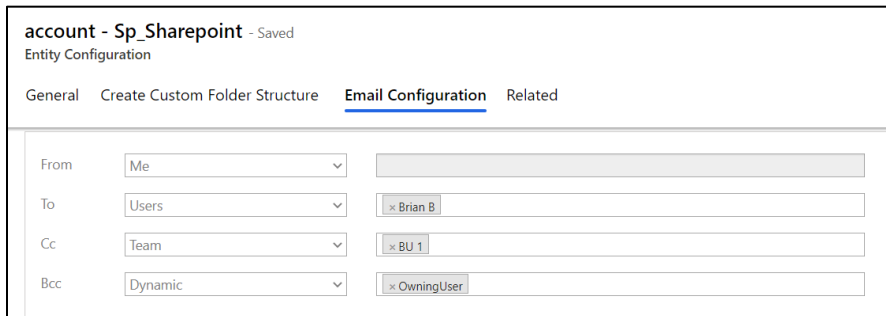
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## Entity Configuration

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

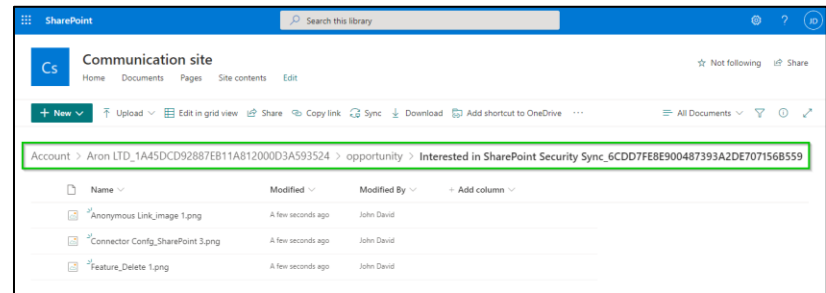
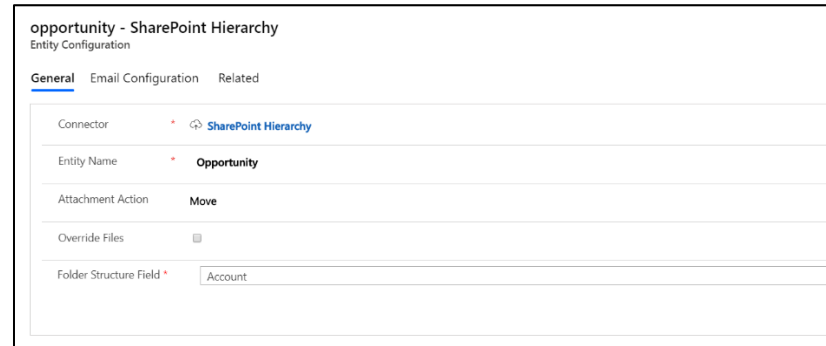


Set default from, to, cc, and bcc for an email using Email Configuration.



## Hierarchy Structure

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



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## Custom Folder Structure

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

The screenshot shows the 'Entity Configuration' page for 'account - Sp\_Sharepoint'. The 'Create Custom Folder Structure' tab is active. It contains two sections: 'Create Library Structure' and 'Create Record Folder Structure'. In the 'Create Library Structure' section, 'Library structure' is set to 'Custom' and 'Document Library Format' is set to '{preferredcontactmethodcode}'. In the 'Create Record Folder Structure' section, 'Folder Format' is set to '{name} Alpha'.

The screenshot shows a SharePoint library view for a 'Communication site'. The breadcrumb path is 'Account Any > Northwind Traders Alpha\_C2A19CDD88DFE311B8E56C3BE5A8B200'. The folder name is highlighted with a green box. The table below shows columns for 'Name', 'Modified', and 'Modified By'.

## Security Templates

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

The screenshot shows the 'Access Level 1' Security Template configuration page. The 'Permissions' tab is active, displaying a table of permissions with checkboxes for enabling or disabling them.

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

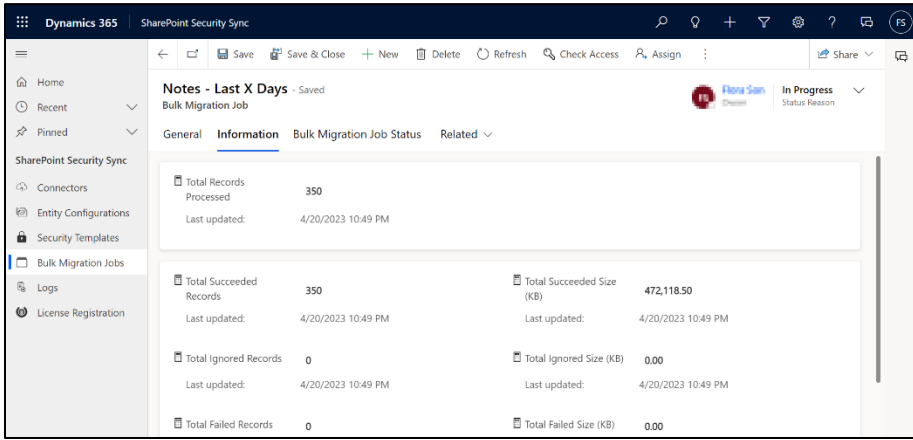
## Bulk Migration Job

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

The screenshot shows the 'Bulk Migration Job' configuration page in Dynamics 365. The 'Notes - Last X Days' job is selected. The configuration details are as follows:

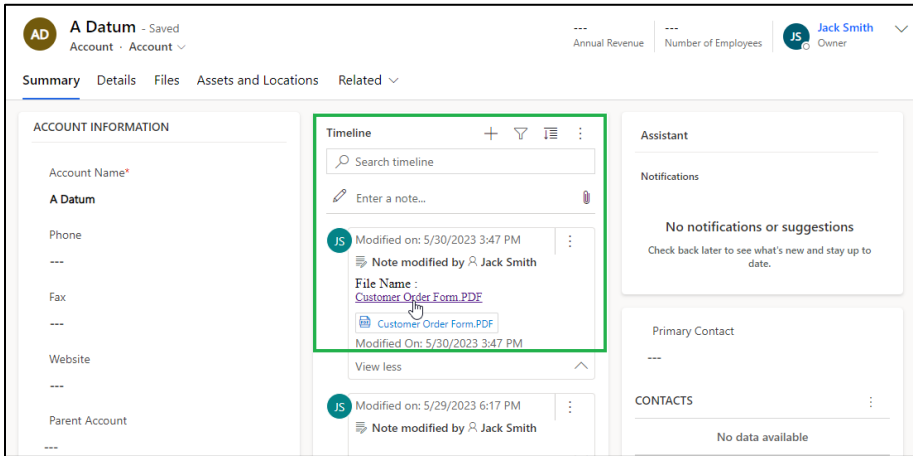
Field	Value
For ?	Notes
Select Duration Criteria	Last X Days
Connector	SharePoint
Schedule Date	4/20/2023 10:49
Attachment Action	Move
Value	1

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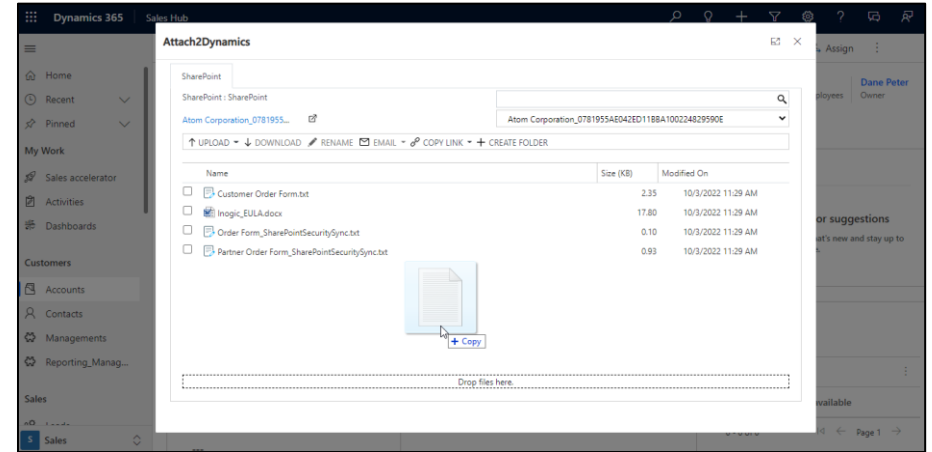
## Move/Copy Attachments

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



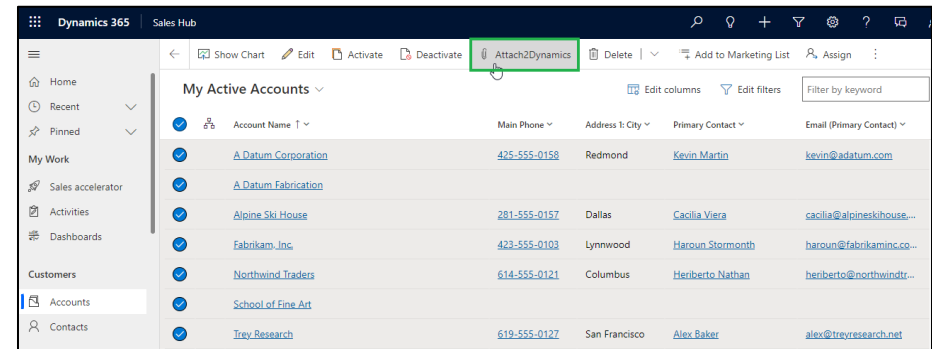
## Drag & Drop

Drag and Drop files/folders through the Attach2Dynamics UI.

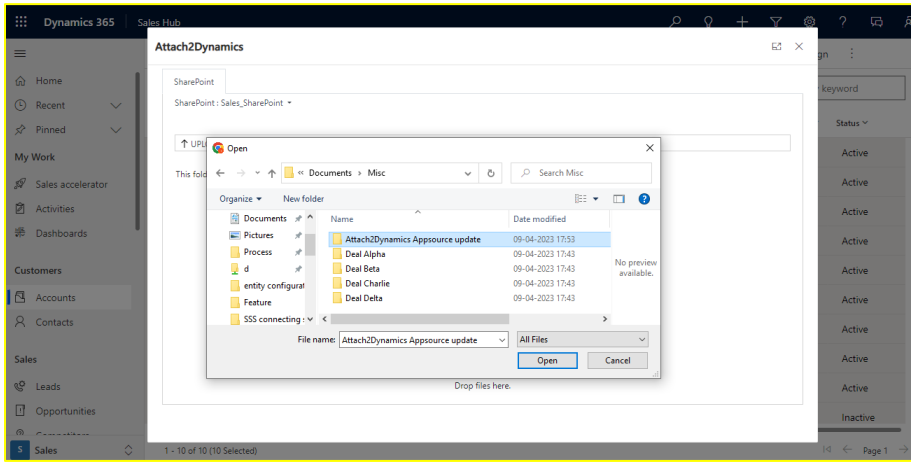


## Direct Upload of files from Home Page

Upload files directly from home page for selected records.

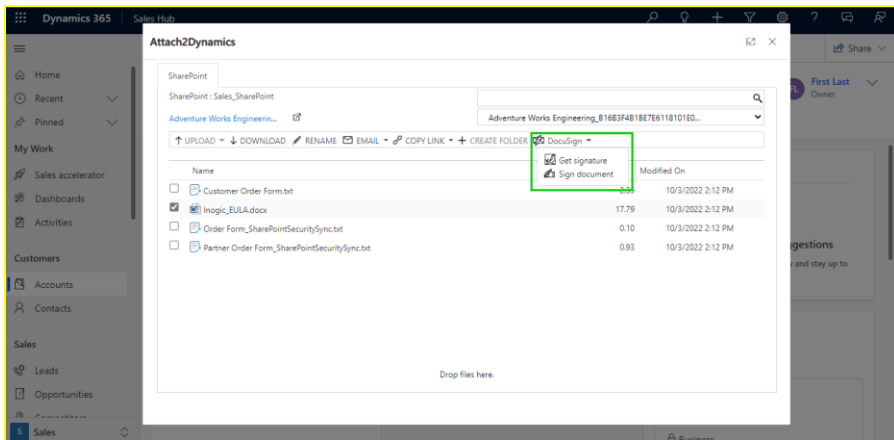


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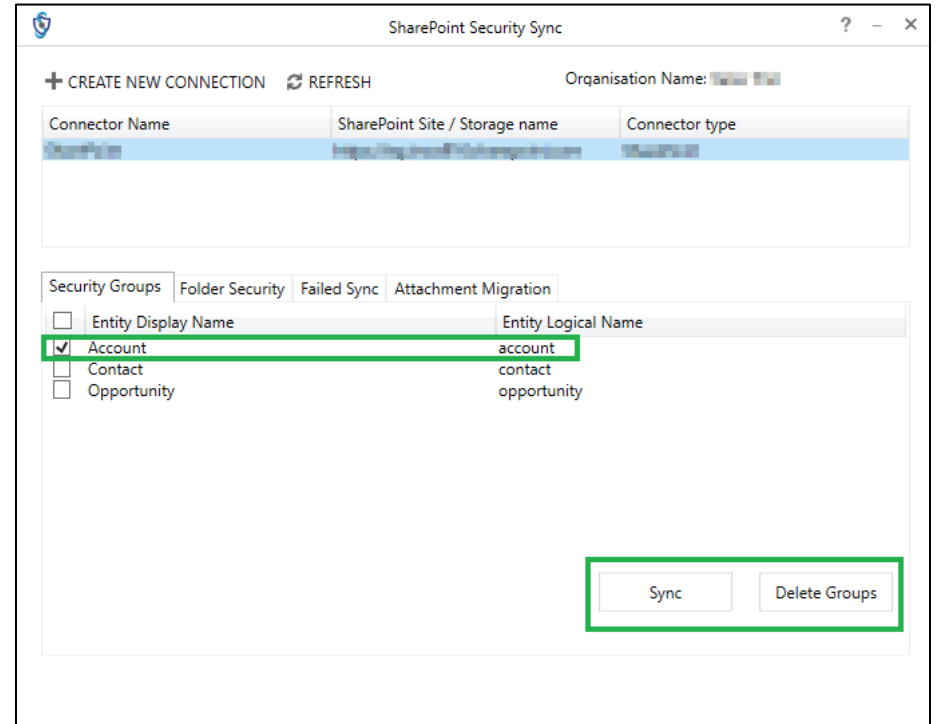
## DocuSign Integration

Use DocuSign to electronically sign documents stored in SharePoint.



## SharePoint Security Sync Tool

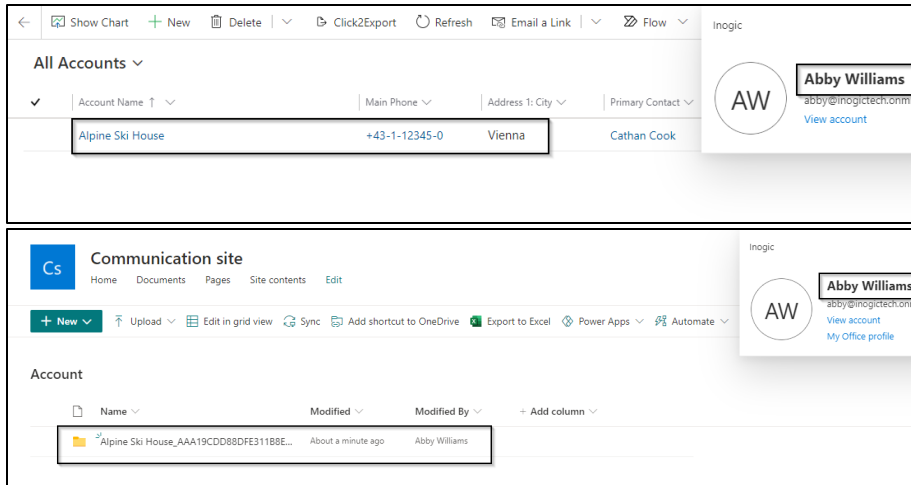
Use SharePoint Security Sync tool to sync security privileges on a large scale with ease.



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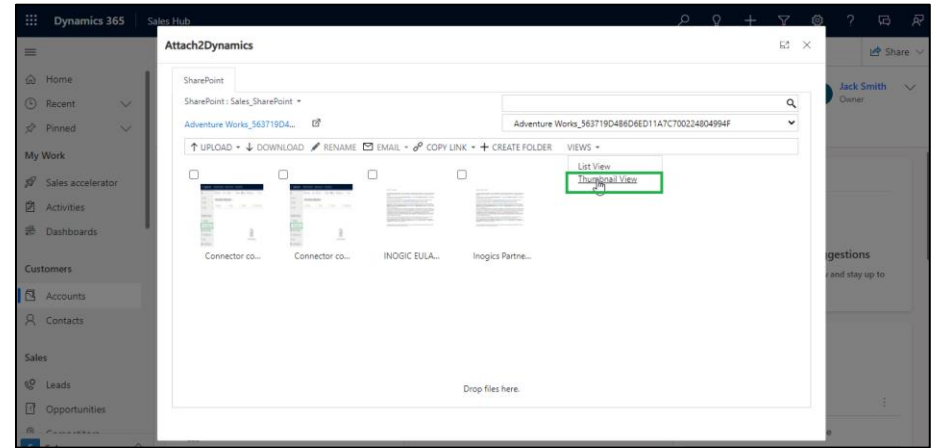
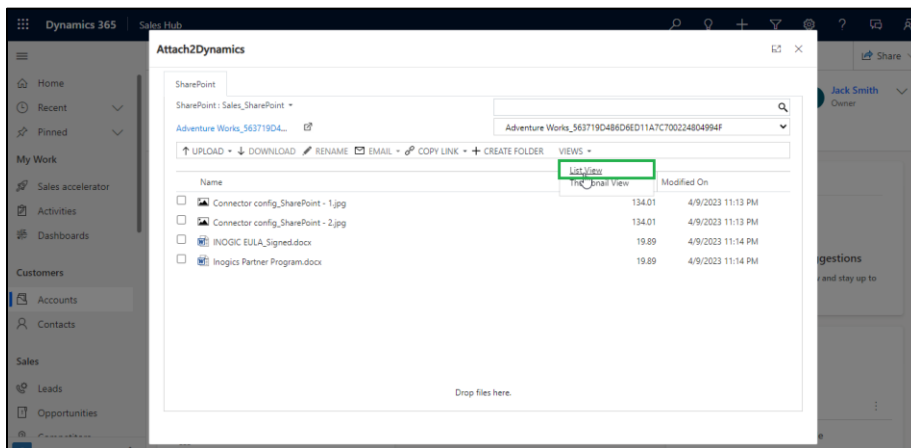
## Sync Details of User with User Level Privilege

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



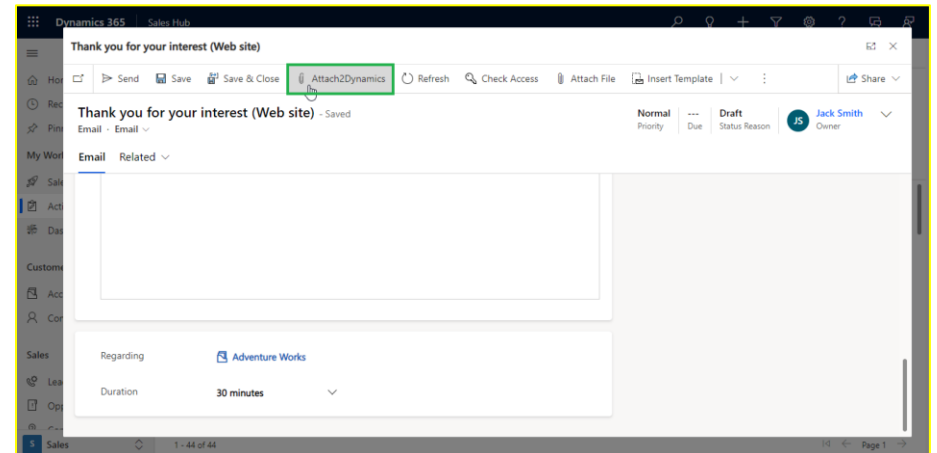
## Thumbnail View and List View

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



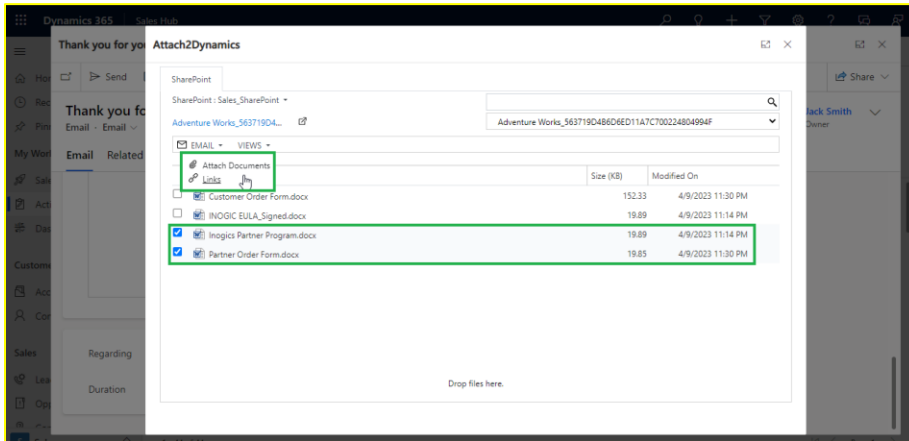
## Attach Files of Various Records Directly from Email Form

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





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### 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.

### 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.

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**Contact Us:**

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**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](mailto:crm@inogic.com)

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

**Twitter:** @inogic