Administrator & User Guide

July 2017

Version 4.0.0.9

MSD DocStore is a product of

DotWood CRM B.V.

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The Netherlands

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1 Introduction

The DocStore is a tool which automatically stores attachments from Microsoft Dynamics 365 (MSD) into SharePoint. DocStore allows for better management of files from MSD and reduction of data storage costs in MSD online. The following shows an overview of the functionality.

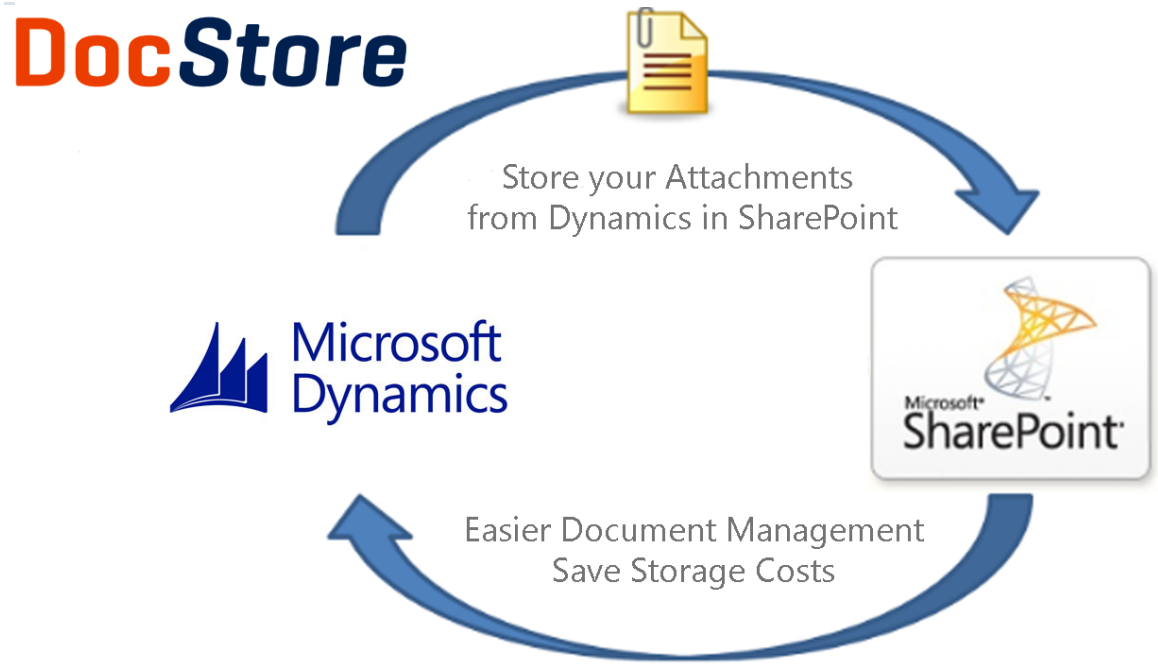


Figure 1: overview functionality DocStore

Both on-premise and online versions of MSD and SharePoint (Office365) are supported. Attachments are stored within the Email document library which is generated by configuring the Document Settings within MSD. Stored files remain visible in MSD from the Related Documents area on the Email form. Furthermore, direct links to the stored files are available on the Email form which allow the user to open the files quickly. Docstore can easily be customized to provide roll-up file overviews and field mappings into SharePoint.

This documents contains explanations to get started with DocStore, on required settings, customization options and functionalities. The assumption is made that the DocStore is retrieved via the Appsource. The trial process is not explained in this document as this is explained on the website www.appsource.com.

A separate migration tool is available for DocStore in case existing e-mail or note attachments in MSD need to be migrated. Although explained in this guide, please consult your MSD partner of contact support@crmdocstore.com for further assistance.

2 Prerequisite Settings

2.1 Prerequisite Document Management Settings

PLEASE NOTE: IN ORDER TO CONFIGURE AND CORRECT FUNCTIONING OF DOCSTORE THE DOCUMENT INTEGRATION WITHIN MSD MUST BE ENABLED AND CONFIGURED WITHIN THE DOCUMENT MANAGEMENT SETTINGS. SEE ALSO APPENDIX I FOR ENABLING SERVER SIDE INTEGRATION.

- Select Document Management within Settings area
- Verify that the Email entity and Note entity is enabled within Document Management Settings.

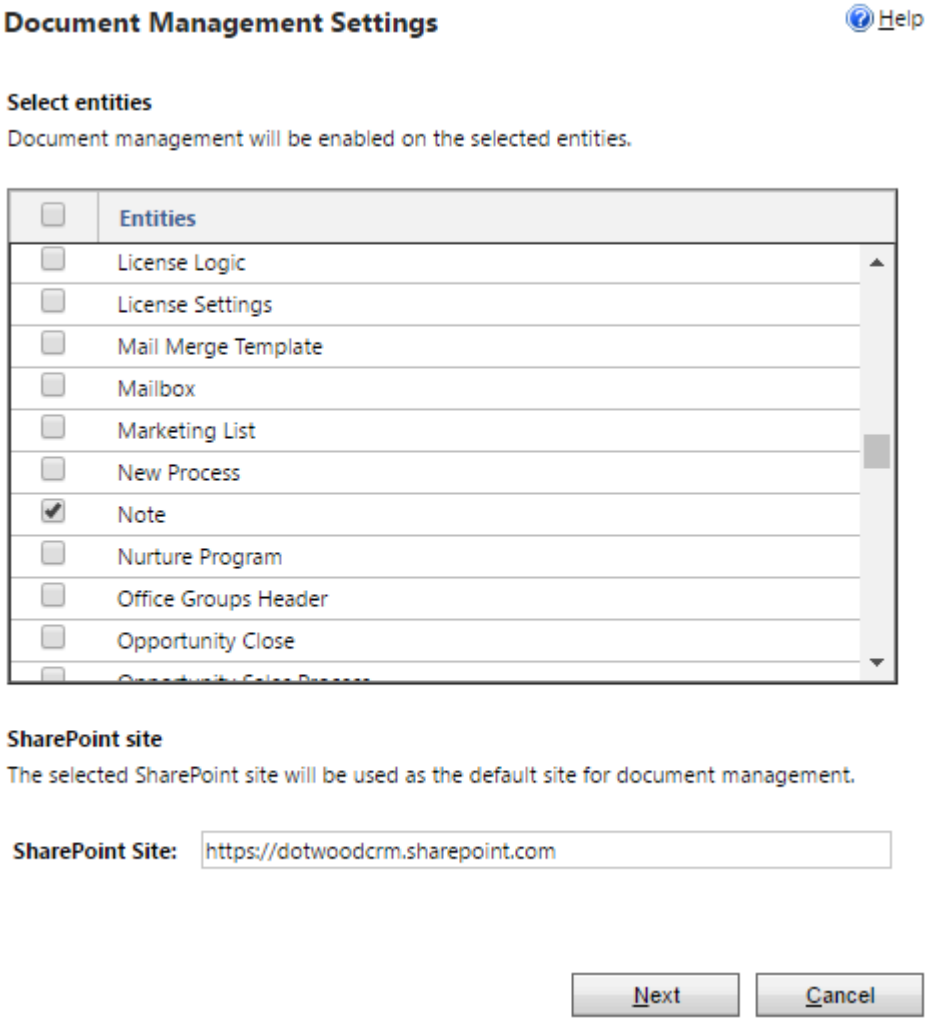


Figure 2: email and note entity must be checked

- Finish configuration of the standard SharePoint integration.

2.2 Imported solutions via AppSource

When finishing the FREE TRIAL process available at AppSource, the following solution must be in place.

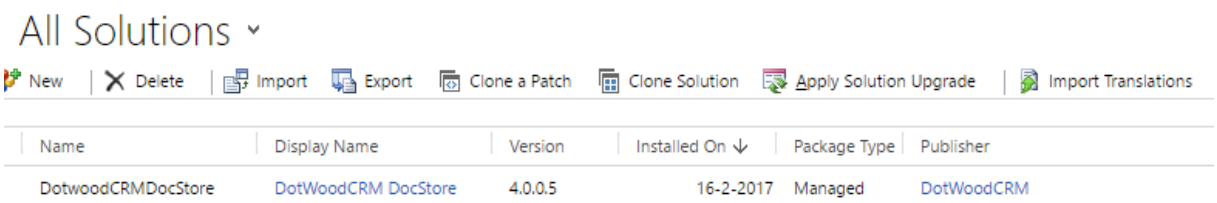


Figure 3: imported solution after free trial process AppSource

2.3 DocStore settings

Prior to first use some initial settings must be done within MSD.

- Navigate to Settings > Document Management
- Select SharePoint Sites

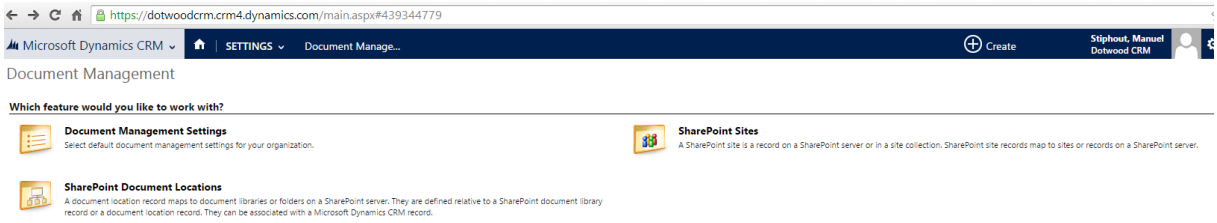


Figure 4: selecting sharepoint sites in document settings

- Select the Default Site

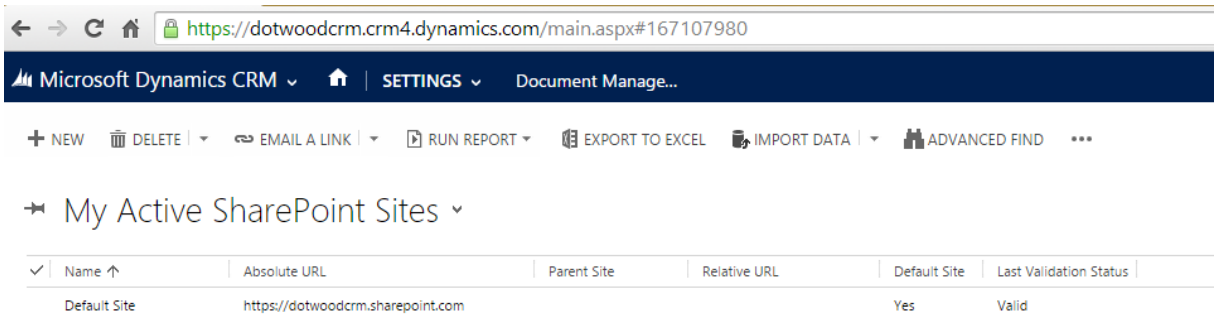


Figure 5: selecting the default sharepoint site which contains docstore settings

- Go to section Doc Store Settings section on SharePoint Site form

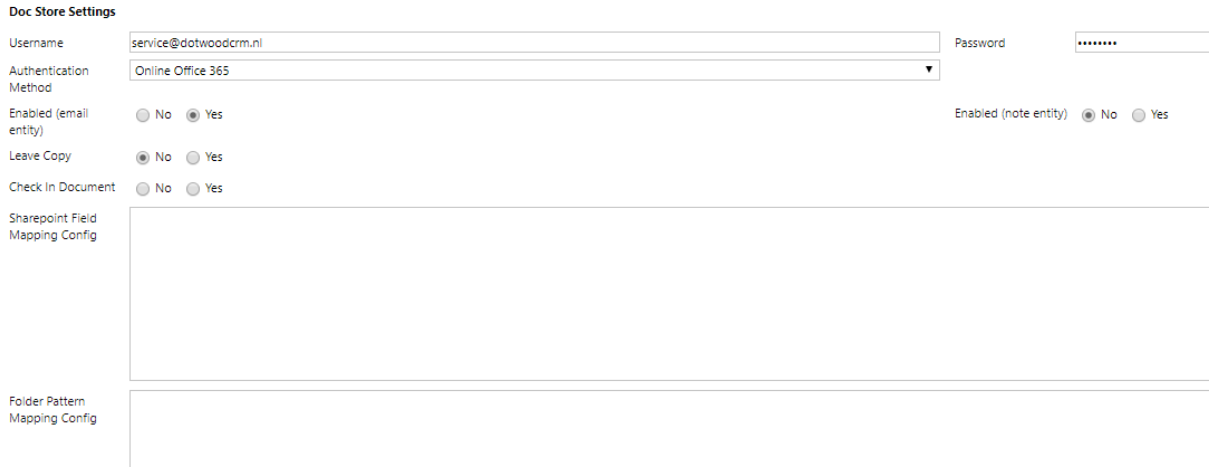


Figure 6: docstore settings on the sharepoint site (default) record form

The following DocStore settings are available:

Field	Description
Username	This is the user which DocStore will use to save files in SharePoint. This must be a user with both access MSD and SharePoint. A service account is recommended of which the password does not change.
Password	The is the corresponding password of the user above.
Authentication Method	The method which is used to access MSD/SharePoint. Select *Online Office365* in case of MSD online and SharePoint online.
Enabled	Select Yes to enable DocStore functionality. Select No in case the functionality must be (temporarily) disabled.
Leave Copy	Select *No* so the original attachment in MSD will be deleted when copied successfully to SharePoint. It is recommended set this option to *Yes* during trial period.
Check in Document	**Leave this field blank (recommended).** Only fill in *Yes* if checkin needs to be forced due to additional configuration for checkin in SharePoint.
SharePoint Mapping Config	This field is used to configure field mapping to SharePoint. If left blank (recommended) only the minimal standard fields will be populated in SharePoint. See next chapter for further explanations.
Folder Pattern Mapping Config	This option allows for storage of attachments in a custom document locations in SharePoint other than the standard integration explained in 4.3. Leave this field blank when standard integration between Dynamics and SharePoint is used.

PLEASE NOTE: FILES WILL BE CREATED IN SHAREPOINT BY THE SYSTEM USER. ACCESS TO FILES BY MSD USERS IN SHAREPOINT IS CONFIGURED WITHIN SHAREPOINT.

- Select Save & Close
- DocStore is ready to use.

2.4 Configuring multi-entity search (optional)

The easiest and fastest way to search for e-mail attachments is by using the multi-entity search. This search box is available in the top ribbon.

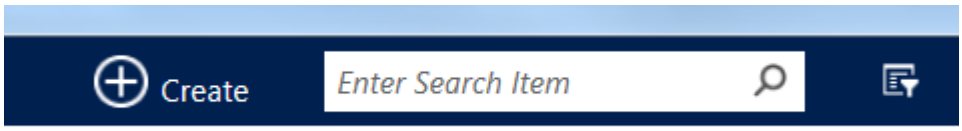


Figure 7: multi-entity search box

In order to search for email attachments the multi-entity search must be configured from Settings>Administration> System Settings in the General tab.

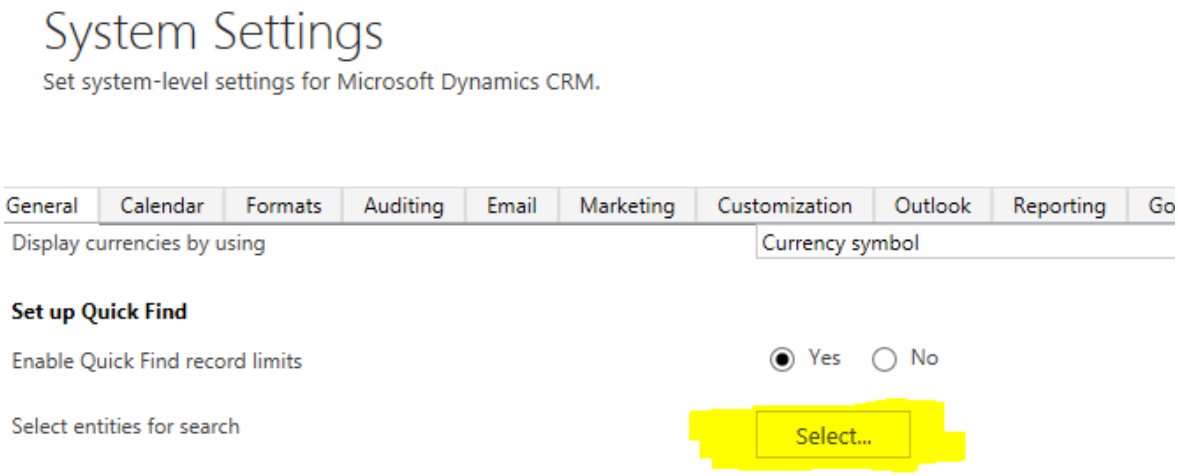
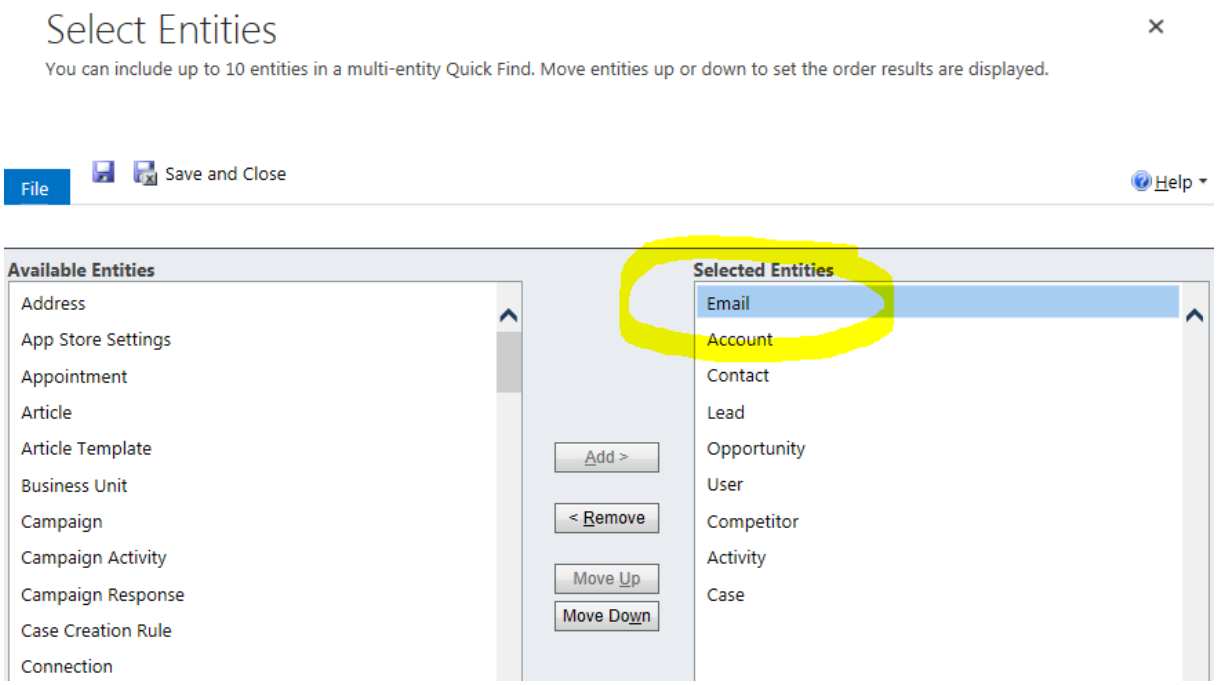


Figure 8: select entities for multi-entity search in system settings

Make sure the Email is selected so emails are included in the search results.



Next chapter will explain the use of this search functionality.

PLEASE NOTE: THE FIELD SHAREPOINT LOCATION ON EMAIL MUST BE CONFIGURED IN THE QUICK FIND VIEW OF EMAIL ENTITY AS FIND FIELD. FOR VERSION DOCSTORE .23 AND EARLIER THIS MUST BE DONE MANUALLY.

3 Use and Functionalities

After completing the configuration the DocStore will automatically capture email and note attachments from MSD once the email and note activities are created and closed in MSD.

3.1 Viewing and opening attachments

3.1.1 Via the Email form

On the email form in MSD are links available which the user can use to quickly access and open the Email attachments. Both e-mails created within MSD and created from Outlook (by tracking) are supported. Forwarding of e-mails with attachements is also supported.

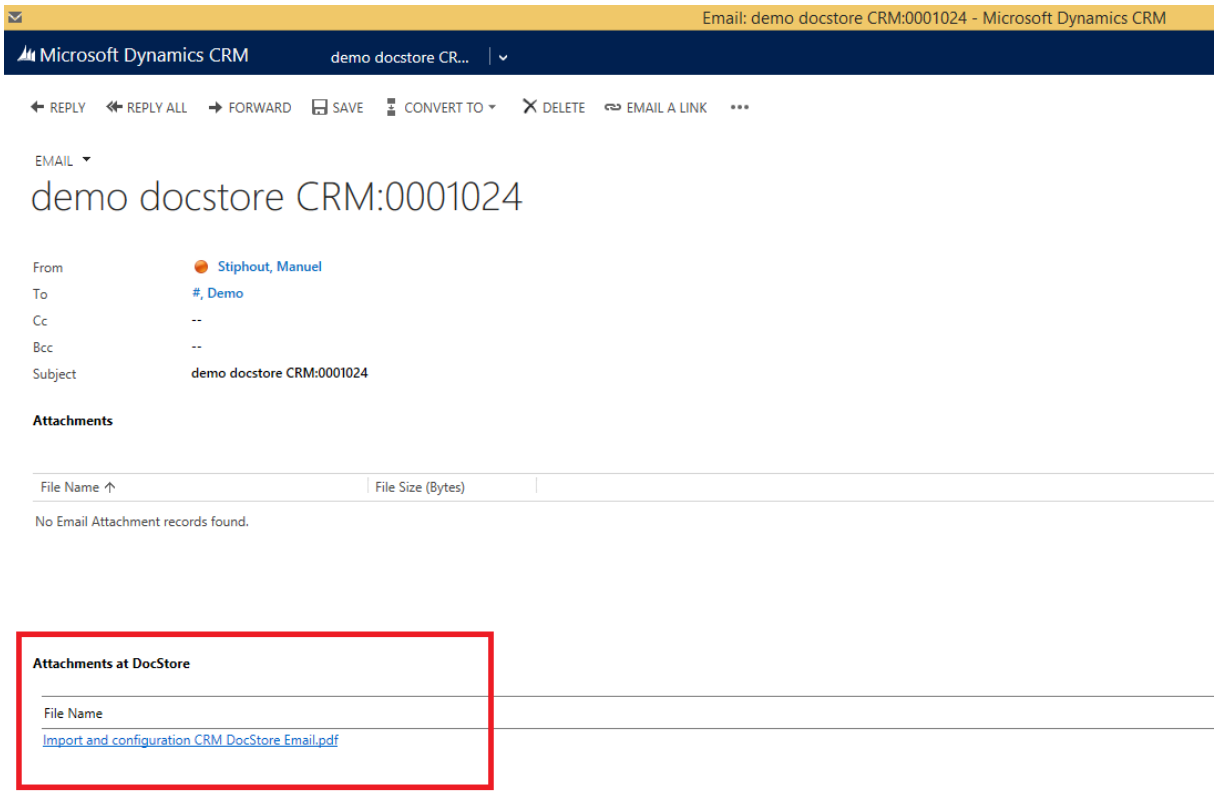


Figure 9: any attachment is accessible via a link on the email form

The attachments are also available from the related Documents section on the Email form.

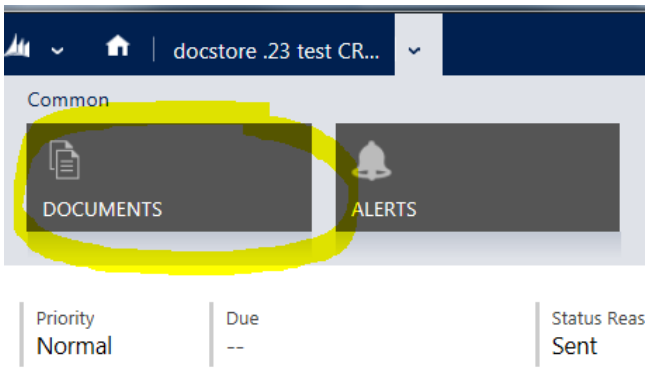


Figure 10: the Documents section on the Email Form

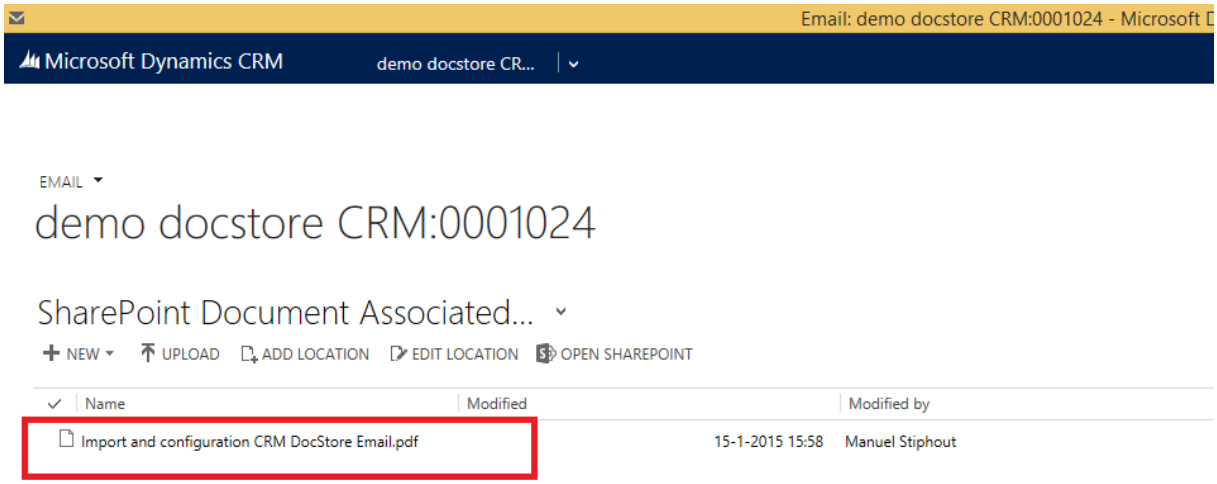


Figure 11: attachments are visible in the standard related Documents section

3.1.2 Via the rollup view

If the rollup view is configured (see 4.1) the user will be able to view and open e-mail attachments from the entity form view. In the following the rollup view is available on the account form. The rollup view consists of the main (related) fields from the email (attachments).

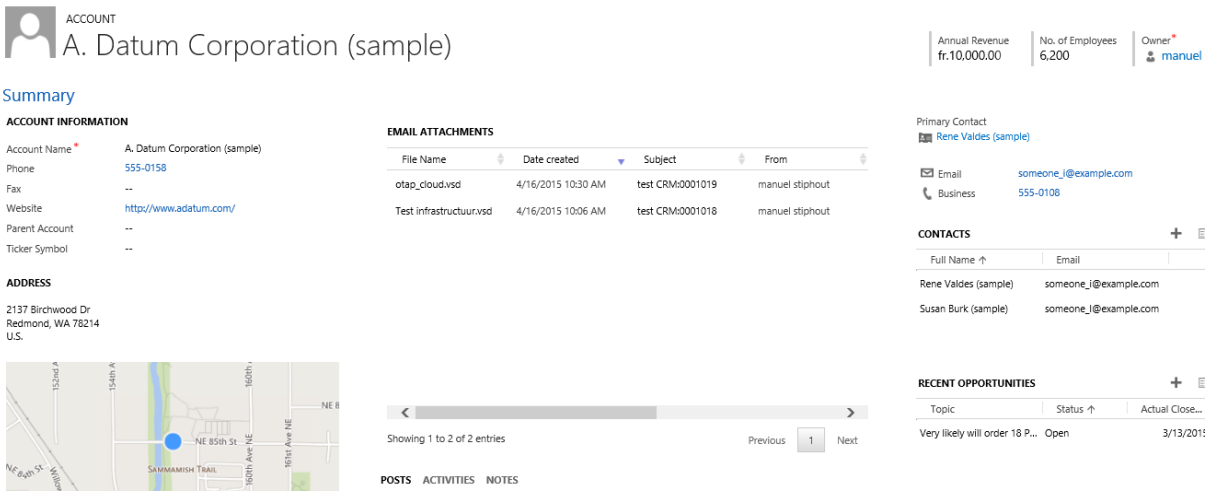


Figure 12: rollup view on account form to view and open attachments and related records

3.2 Searching attachments

3.2.1 Via multi-entity search in MSD

Via the multi-entity search the user can search for e-mail attachments by using the filename as search word. In the following example an email attachment with filename 'test infrastructuur.vsd'. The search word does not require minimum amount of characters but should contain an asterix (*) if the filename does not start with the letters inserted as search words.

Enter the search word in the search box en select magnifying glass. In the following example 'test infra' is entered.

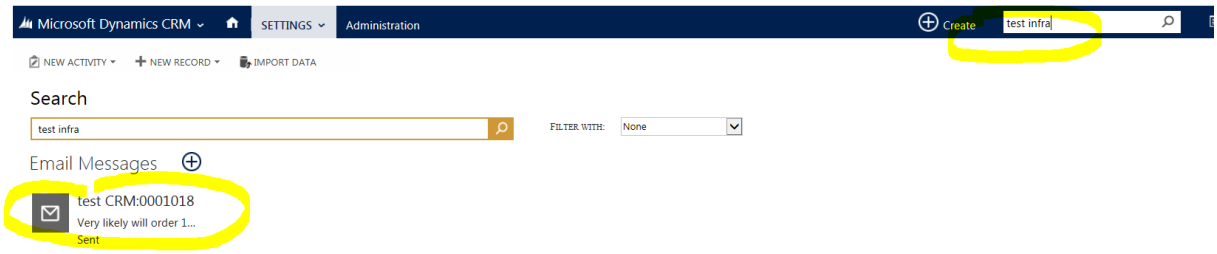


Figure 13: email as search result from multi-entity search

The search result is an email. Open the email and the attachment file name is visible as a link.

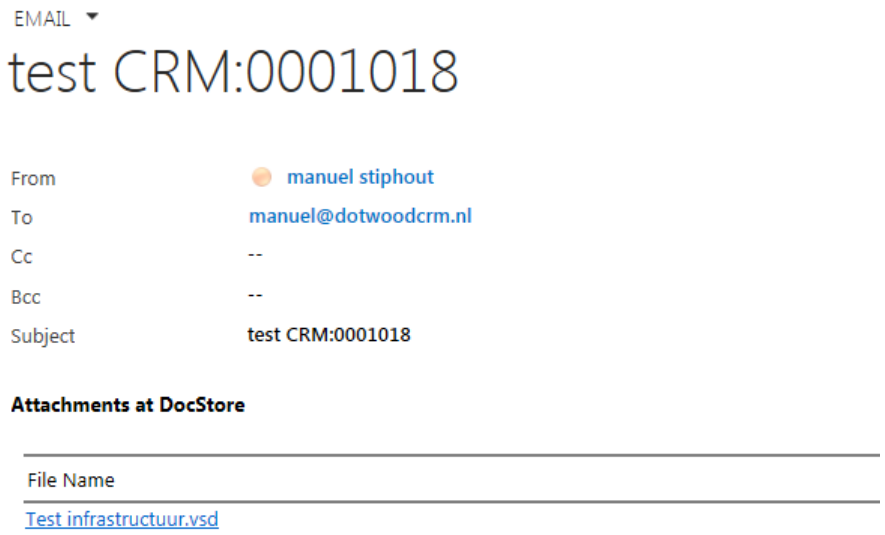


Figure 14: open the search result email and the attachment is visible

3.2.2 Via Advanced Find

Alternatively, the user can use Advanced Find to find the e-mail/attachments.

- Use the field Sharepoint Location (which contains the file name)

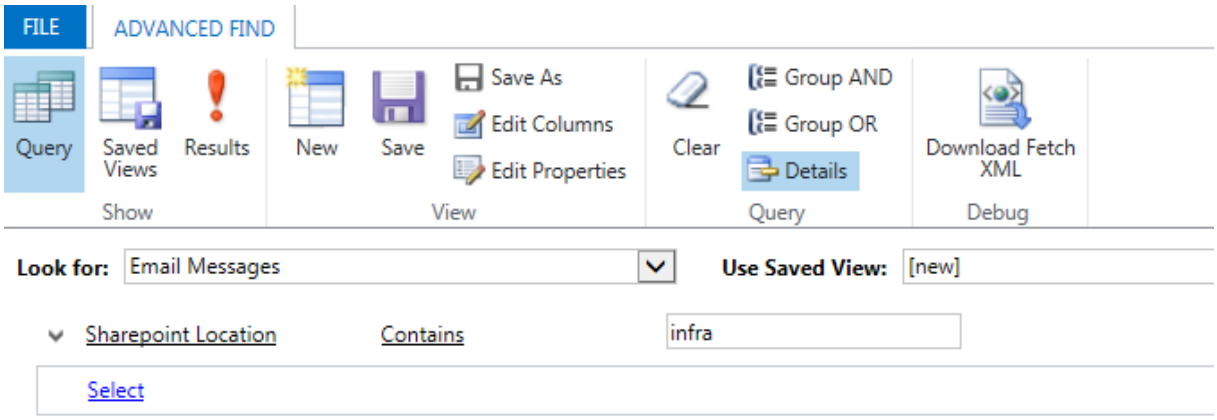


Figure 15: use sharepoint location field to search on file name attachment in advanced find

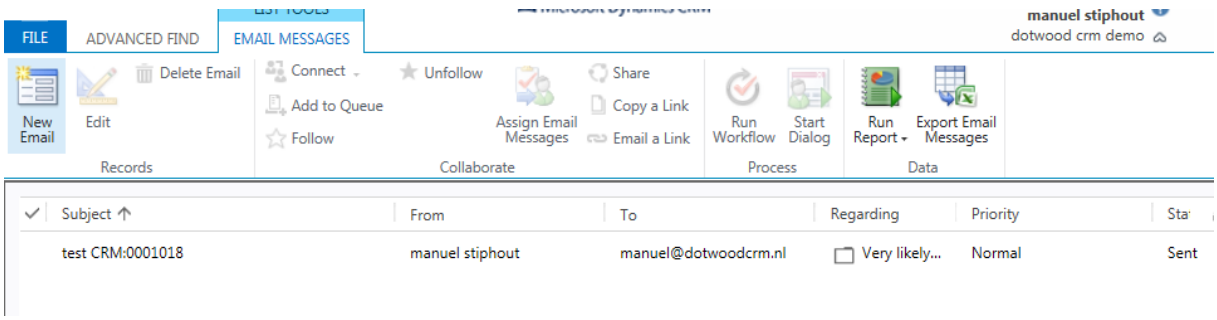


Figure 16: email search result advanced find

3.2.3 Via SharePoint

As e-mail attachments are saved in SharePoint the user can also search use SharePoint search functionality. These functions are available from both SharePoint views inside MSD and from forms inside SharePoint. This search functionality is configured within SharePoint.

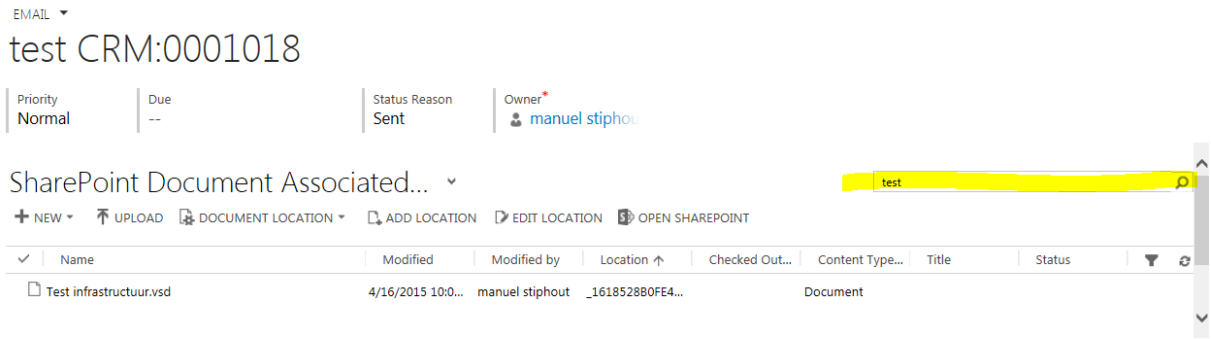


Figure 17: search function Document view in MSD

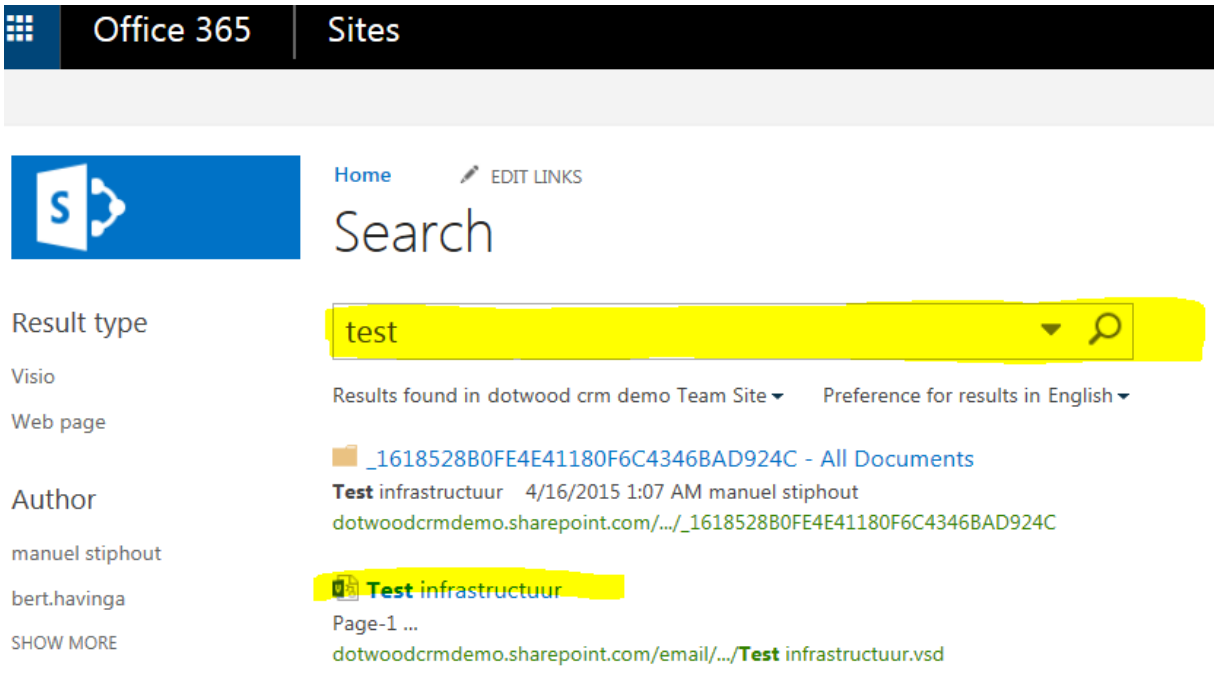


Figure 18: search results in SharePoint

4 Customization Options (administrators only)

DocStore can be customized to add rollup views and SharePoint field mappings. Please note this requires technical skills and therefore it is recommended to contact support at DotWood MSD or your MSD partner for assistance.

4.1 Configuring rollup view

The rollup view provides the ability to view email attachments of underlying records. In the following example the rollup view is added to the account form. The user can view email

attachments of emails which relates to the account but also which relate to underlying records such as the opportunity. The following shows the rollup view of email attachments of emails which relate to both the account and the underlying opportunity.

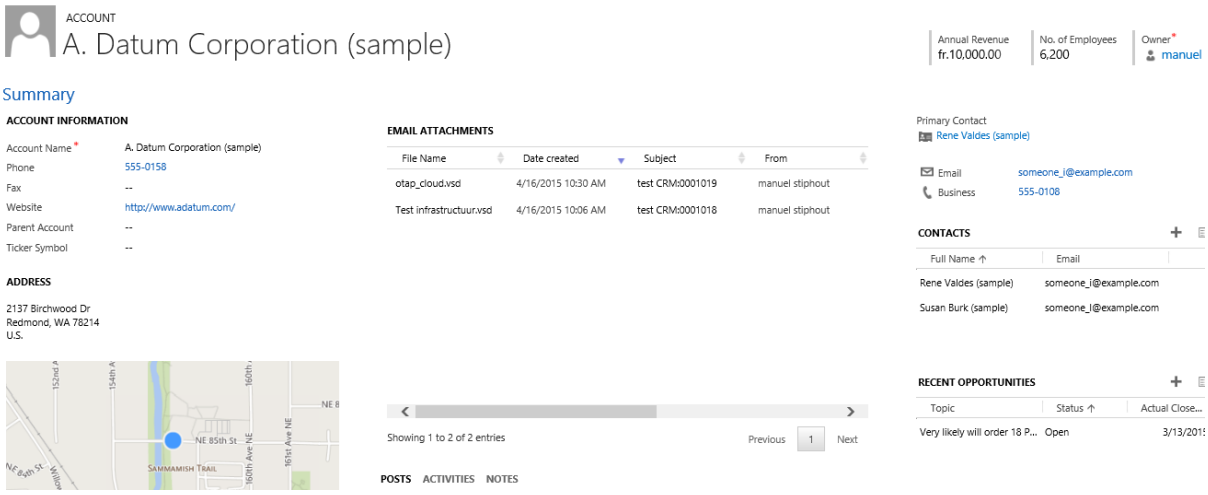
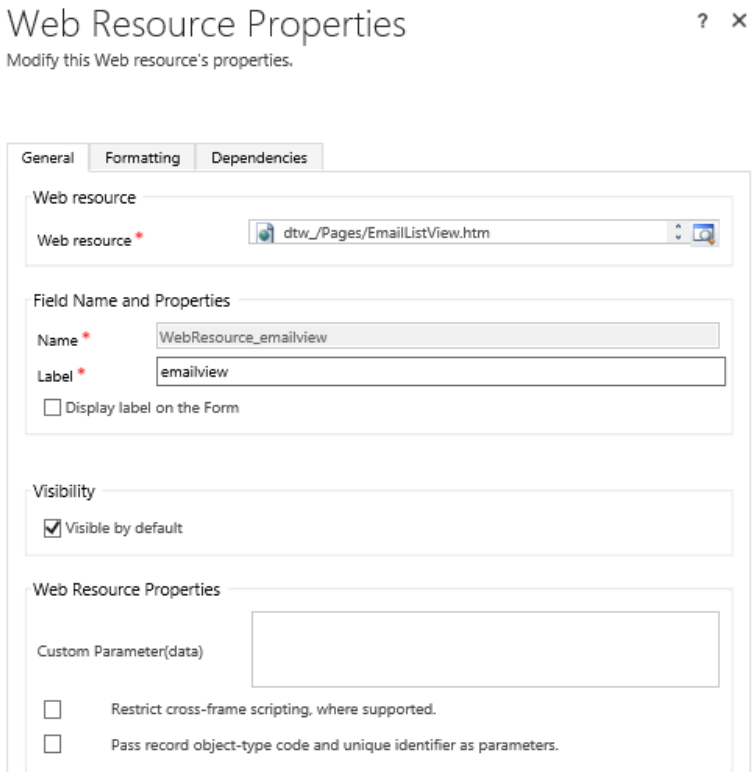


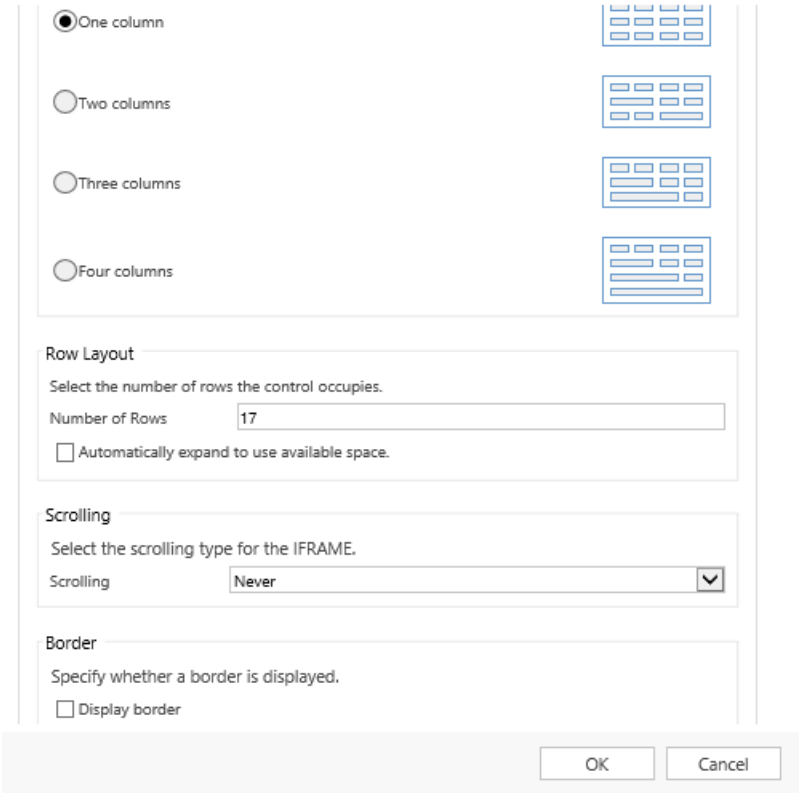
Figure 19: the rollup view on an account record form

The rollup view can be added as a Web Resource. In the form designer select under Insert tab the Web Resource. Look up the Web Resource called dtw_/Pages/EmailListView.htm

The following shows the recommended settings for the Web Resource.



Figuur 1: web resource properties rollup view tab general



Figuur 2: web resource properties rollup view tab formatting

By default the web resource is only available on account, opportunity, salesorder and incident entities. Please contact your partner for assistance in case of further required entities.

4.2 Configuring SharePoint field mapping

By default the DocStore populates some standard metadata fields in SharePoint when transferred such as created on, created by and filename. Within the DocStore settings the field 'SharePoint Mapping Field Config' allows additional fields to be configured in XML format. The following is an example XML which populates the standard field 'Title' in SharePoint with the filename.

```
<FieldInformationConfig>
        <FieldInformation>
                <Id>fa564e0f-0c70-4ab9-b863-0177e6ddd247</Id>
                <Type>Text</Type>
                <DisplayName>Title</DisplayName>
                <InternalName>Title</InternalName>
                <Value>@</Value>
                <AttributeName>filename</AttributeName>
                <AttributeSource>activitymimeattachment</AttributeSource>
                <Format></Format>
        </FieldInformation>
</FieldInformationConfig>
```

- Write or paste the XML configuration text into the SharePoint Mapping field on the DocStore settings area.

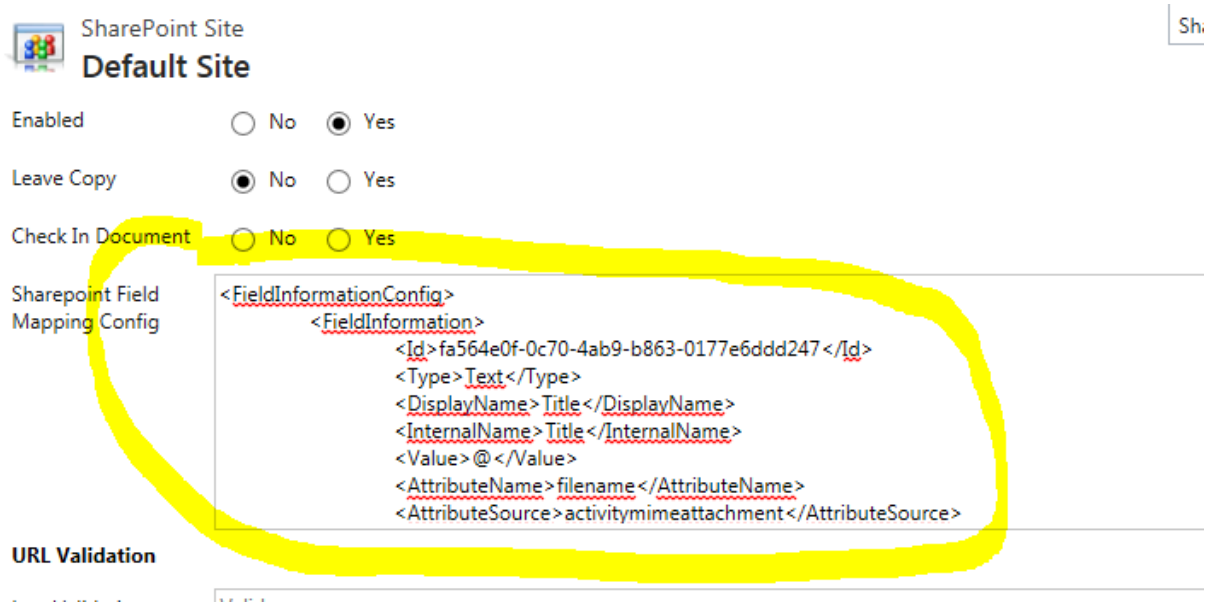


Figure 20: sharepoint field mapping config field must contain the xml config

After saving and closing. In this example the Title field is populated with the filename without extension.

Please contact you MSD partner if you wish to further configure the mapping of SharePoint fields.

4.3 Configuring Folder Pattern Mapping

DocStore can be configured to use custom created Document Locations. This requires an XML configuration in the DocStore settings area. Functionality to create custom Document Locations must already be in place, if not, please consult with your Dynamics partner.

The following is a brief explanation which helps your Dynamics partner to configure:

If exists xml configuration string in field dtw_folderpatternconfig sharepointsite and entity has given logical name

b) logic will be applied to entities different from email

c) mimeattachments are copied to resulting sharepoint locations

Logic replaces file path of attachment to sharepoint based on rule described

To understand how replacement works here is link https://regex101.com/r/TASRp7/2

Below is an example configuration in which a custom work order entity has the incident entity as parent. Attachments from work order are placed in a custom document location,

specifically in the folders ‘internal’ and ‘repair company’ which are present in the document location of the parent incident record.

```
<entitylist>
	<entity name='new_workorder'>
		<folder>
			<expression>(.+)-(\d+)</expression>
			<replacement>incident/$1/$1-$2/internal</replacement>
			<attributeName>new_name</attributeName>
		</folder>
		<folder>
			<expression>(.+)-(\d+)</expression>
			<replacement>incident/$1/$1-$2/repaircompany</replacement>
			<attributeName>new_name</attributeName>
		</folder>
	</entity>
</entitylist>
```

5 DocStore Migration Tool

A migration tool is available to migrate existing attachments to SharePoint via the following URL:

https://ics.blob.core.windows.net/clickonceinstall/publish.htm

Before running the tool make sure you have DocStore solution configured (explained in 2).

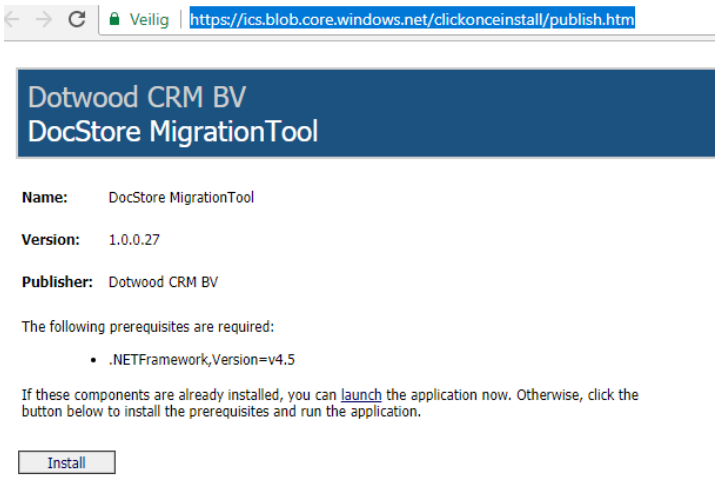


Figure 21: locating the migration tool file for download

Select Install, Save and Run the file

Select Run anyway

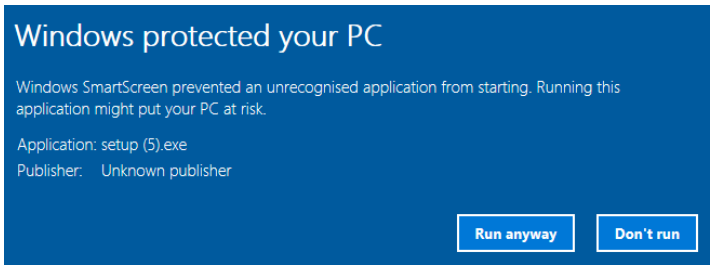


Figure 22: running the file

Select Login to MSD

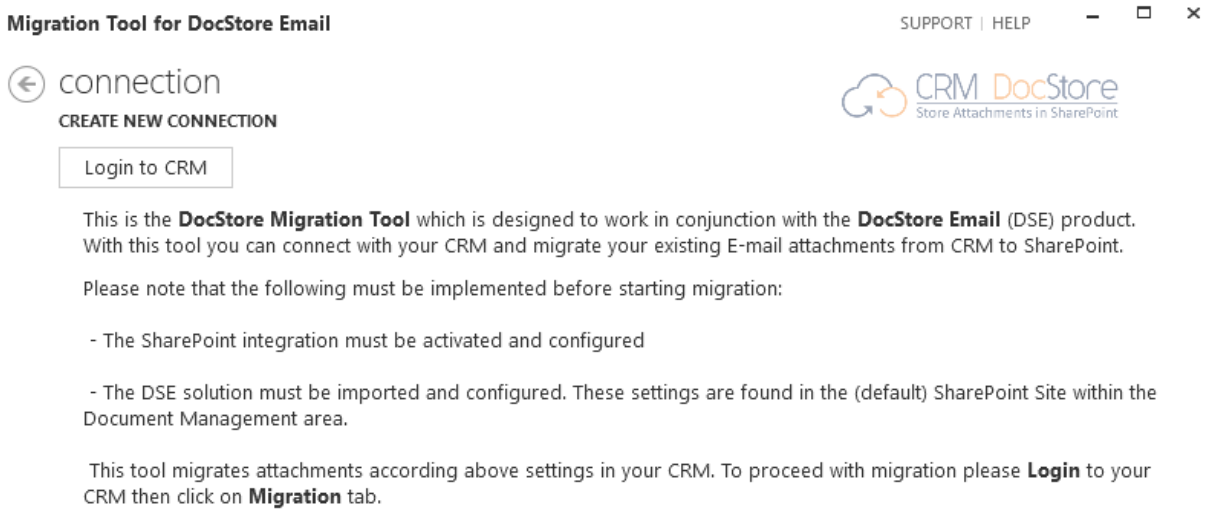


Figure 23: first login to your MSD environment

Select Office365 in case of MSD Online

Enter credentials and select Login

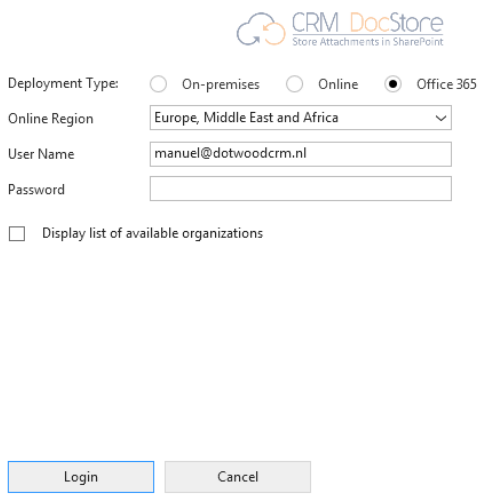


Figure 24: enter credentials and select O365 for MSD Online

Select the right organization/instance and select Login

Figure 25: select the organization/instance

Now select Migration tab

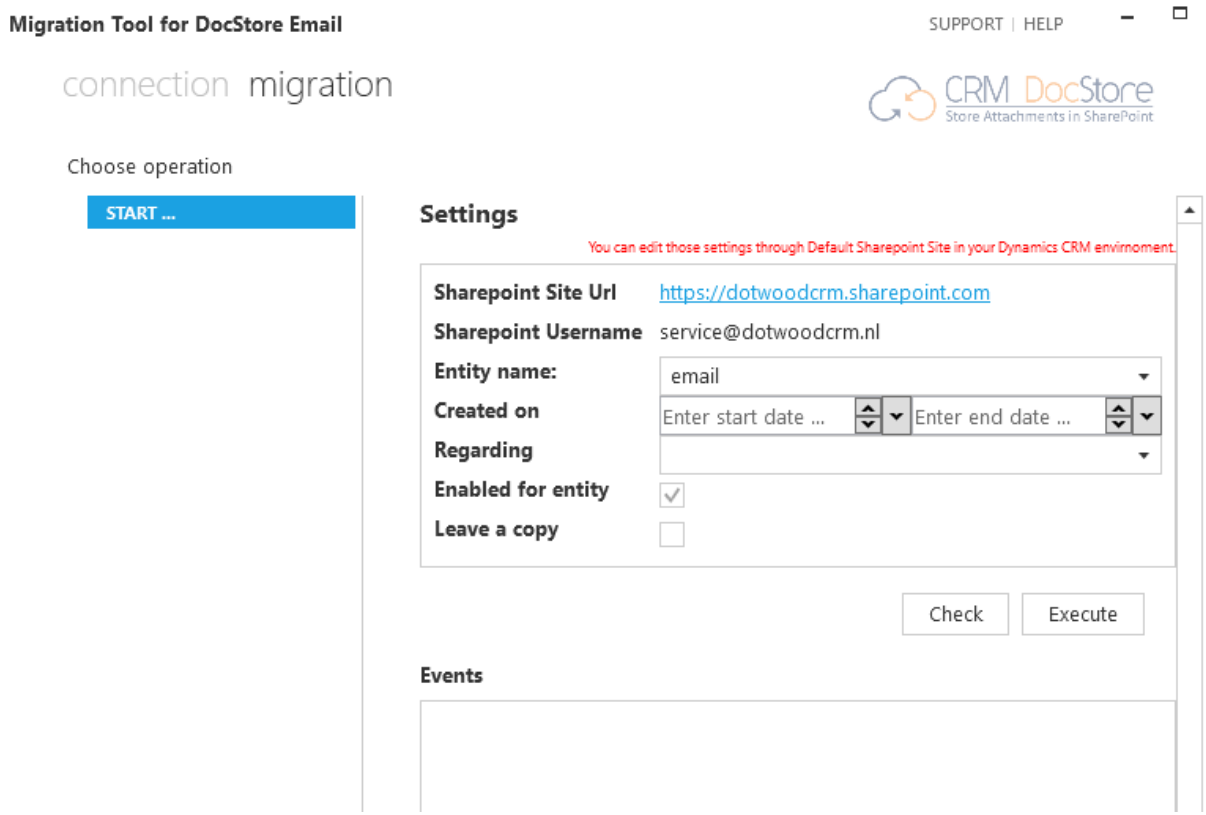


Figure 26: select migration tab select your options

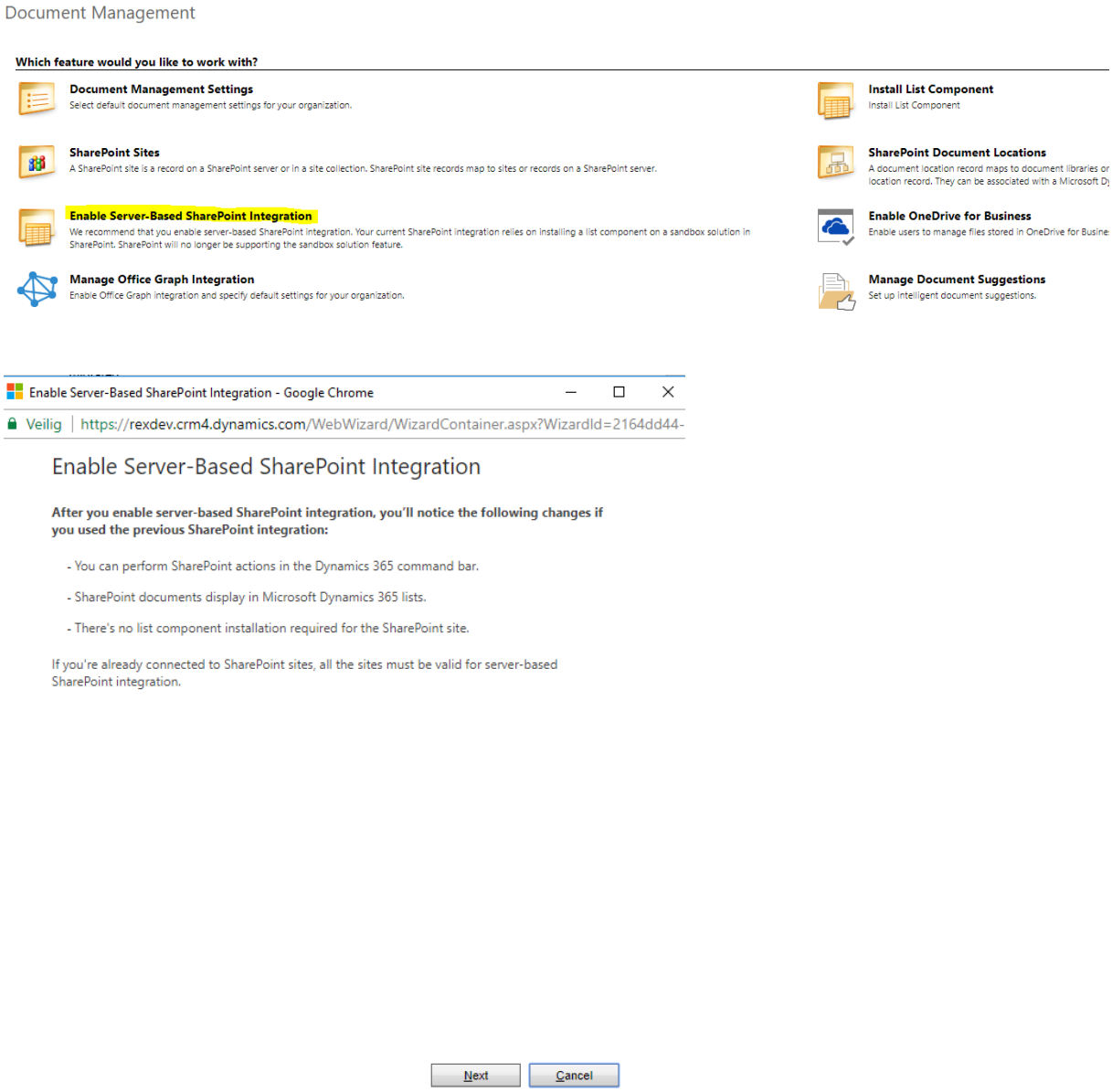
You have the option to migrate either email attachments or note attachments. Email is default selected. The DocStore settings are shown as configured in the Dynamics MSD environment.

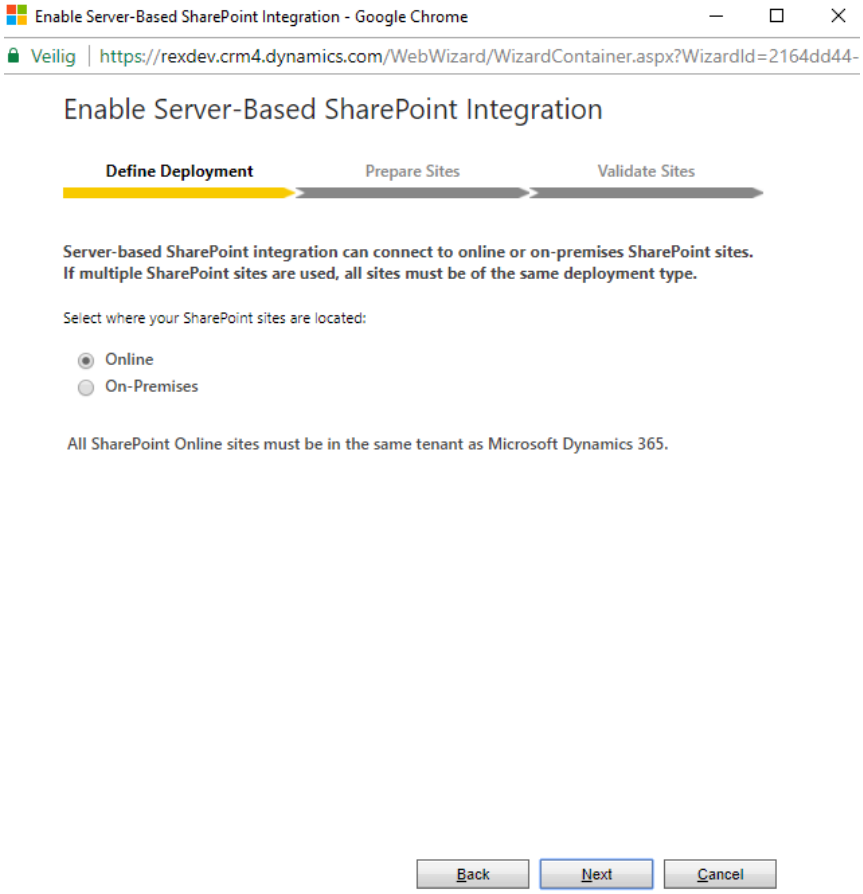
Filters can be applied to select attachments created between a certain time frame and/or regarding specific entity.

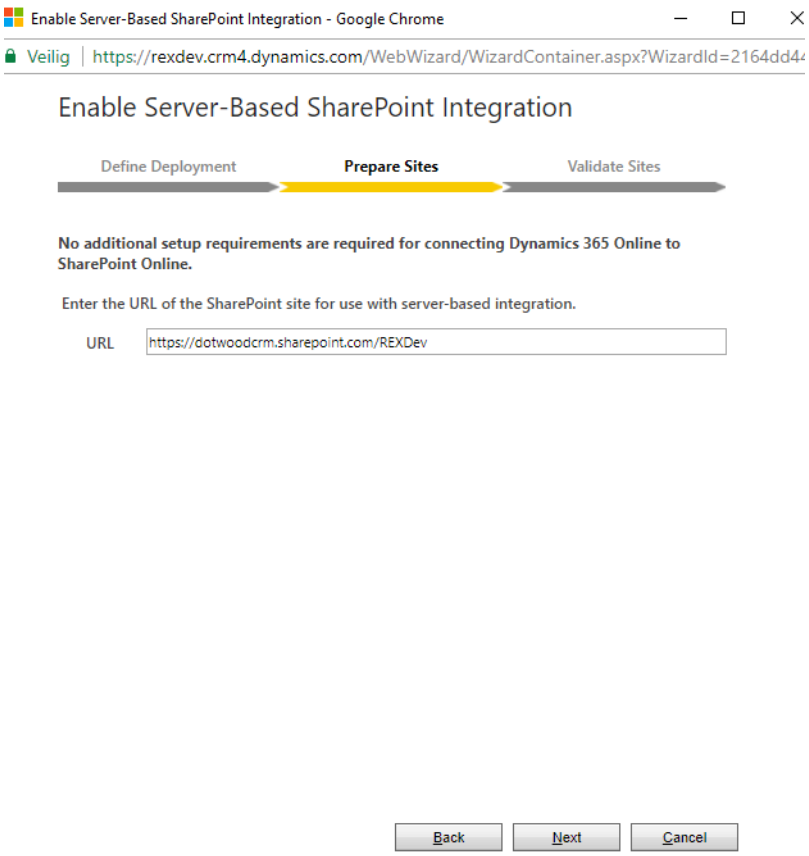
Select Check if you wish to check first how many attachments are in the system to be migrated.

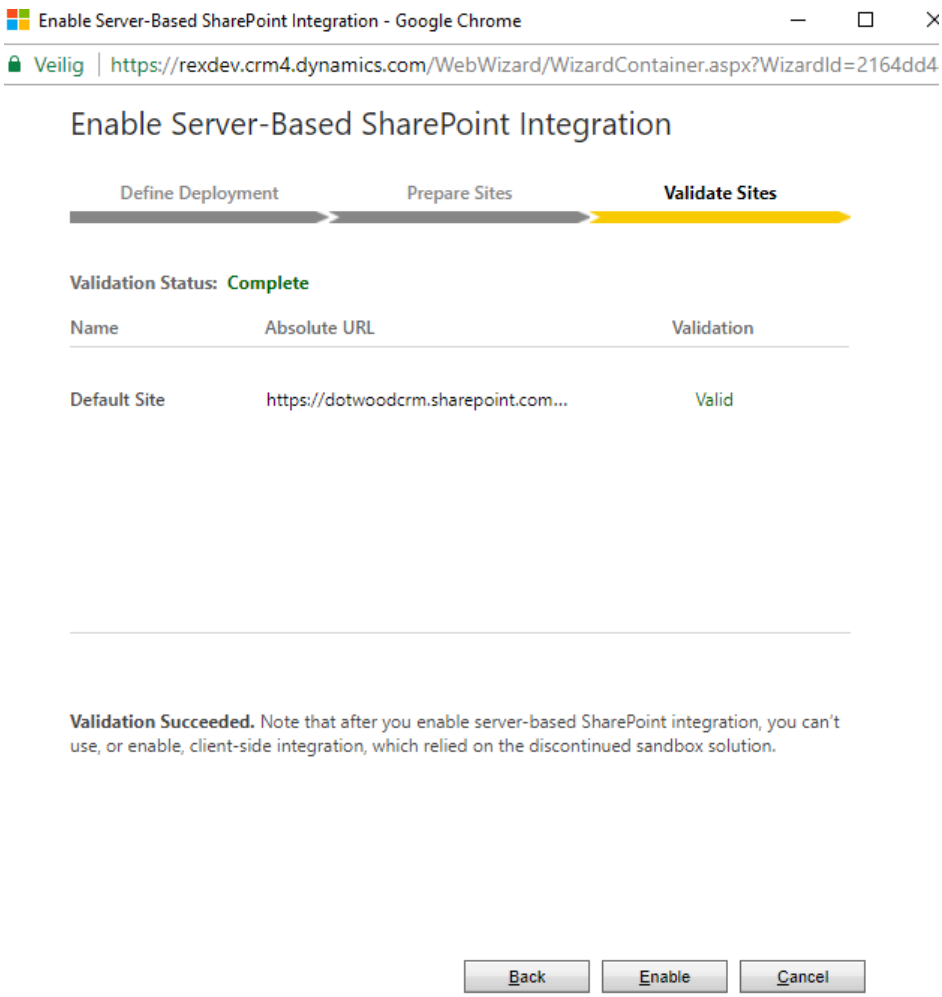
Select Execute to start migration of attachments. Please note that this process may take up much time. Migration process can be stopped at any time by closing the window. The tool can be rerun for any remaining attachment at any time.

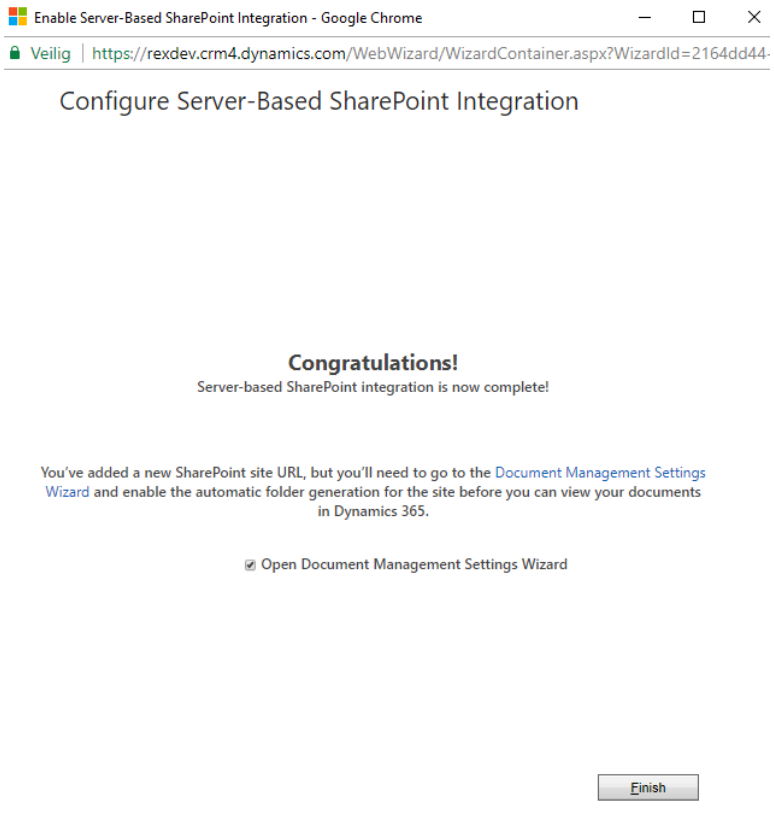
6 APPENDIX I Enable Server Side SharePoint Integration

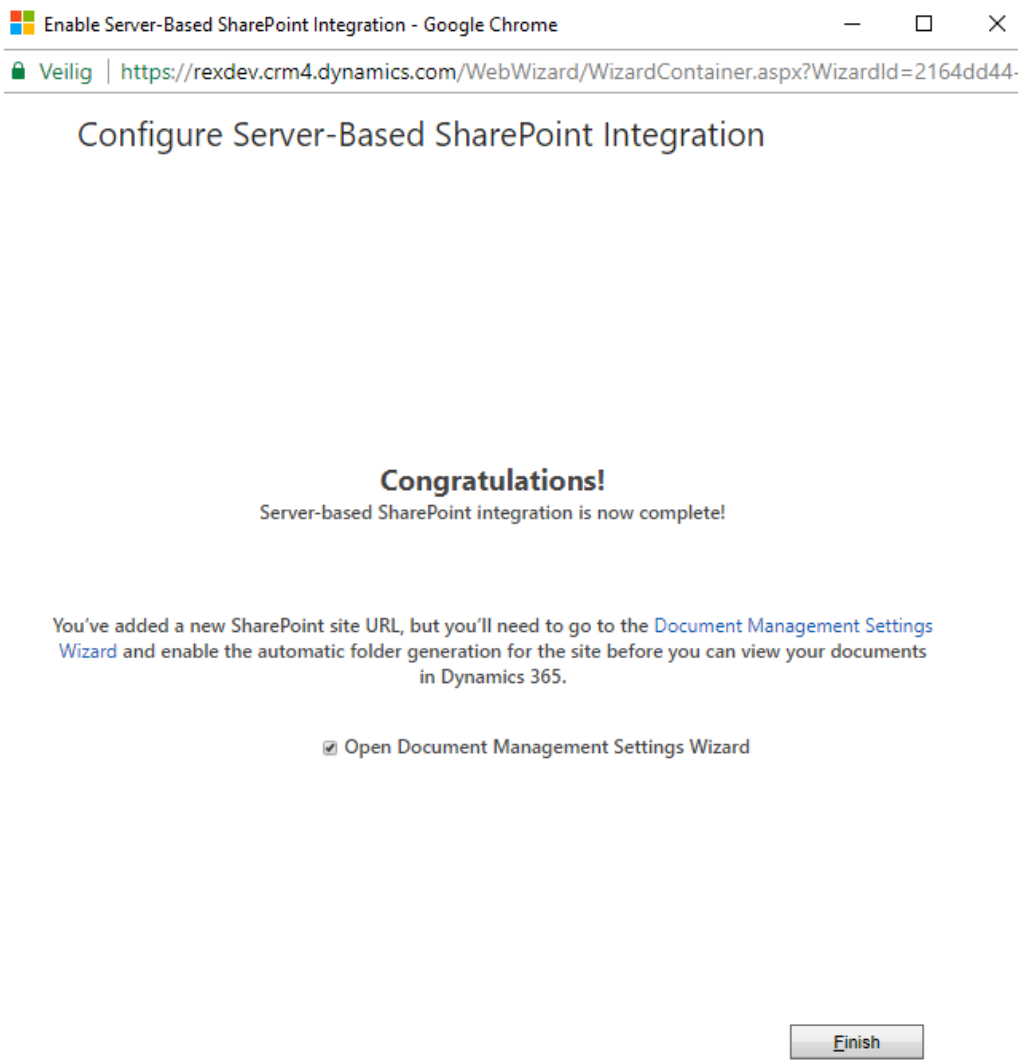



Enable Server-Based SharePoint Integration - Google Chrome
Veilig | https://rexdev.crm4.dynamics.com/WebWizard/WizardContainer.aspx?WizardId=2164dd44-
Enable Server-Based SharePoint Integration
Define Deployment
Prepare Sites
Validate Sites
Server-based SharePoint integration can connect to online or 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.
Back
Next
Cancel


Enable Server-Based SharePoint Integration - Google Chrome
Veilig | https://rexdev.crm4.dynamics.com/WebWizard/WizardContainer.aspx?WizardId=2164dd4
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
https://dotwoodcrm.sharepoint.com/REXDev
Back
Next
Cancel


Enable Server-Based SharePoint Integration - Google Chrome
Veilig | https://rexdev.crm4.dynamics.com/WebWizard/WizardContainer.aspx?WizardId=2164dd4
Enable Server-Based SharePoint Integration
Define Deployment
Prepare Sites
Validate Sites
Validation Status: Complete
Name
Absolute URL
Validation
Default Site
https://dotwoodcrm.sharepoint.com...
Valid
Validation Succeeded. Note that after you enable server-based SharePoint integration, you can't use, or enable, client-side integration, which relied on the discontinued sandbox solution.
Back
Enable
Cancel


Enable Server-Based SharePoint Integration - Google Chrome
Veilig | https://rexdev.crm4.dynamics.com/WebWizard/WizardContainer.aspx?WizardId=2164dd44
Configure Server-Based SharePoint Integration
Congratulations!
Server-based SharePoint integration is now complete!
You've added a new SharePoint site URL, but you'll need to go to the Document Management Settings Wizard and enable the automatic folder generation for the site before you can view your documents in Dynamics 365.
Open Document Management Settings Wizard
Finish



Server-Based SharePoint Integration is enabled. Please proceed with Document Management Settings Wizard as described in 2.1.

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