

DOCUMENT MANAGEMENT

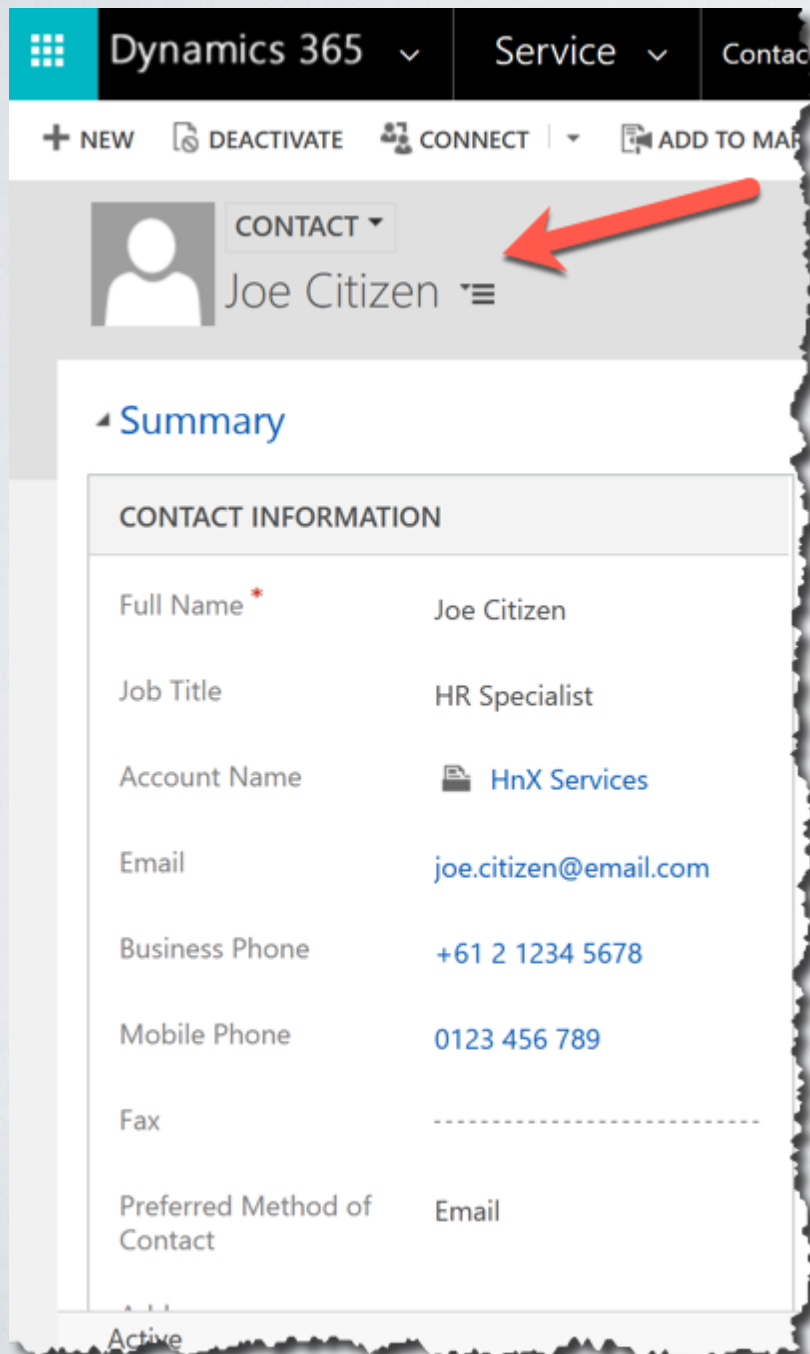
for Dynamics 365 and SharePoint Online

PROBLEMS

- 1) Metadata from Dynamics entities not available in Sharepoint.
- 2) Security access control are not aligned between Dynamics and Sharepoint.
- 3) Excessive Dynamics disk space usage from uncontrolled Notes and Email attachments.

PROBLEM #1

Inability to transfer entity field values from Dynamics to SharePoint.



Dynamics 365 | Service | Contact

+ NEW | DEACTIVATE | CONNECT | ADD TO MAP

CONTACT | Joe Citizen

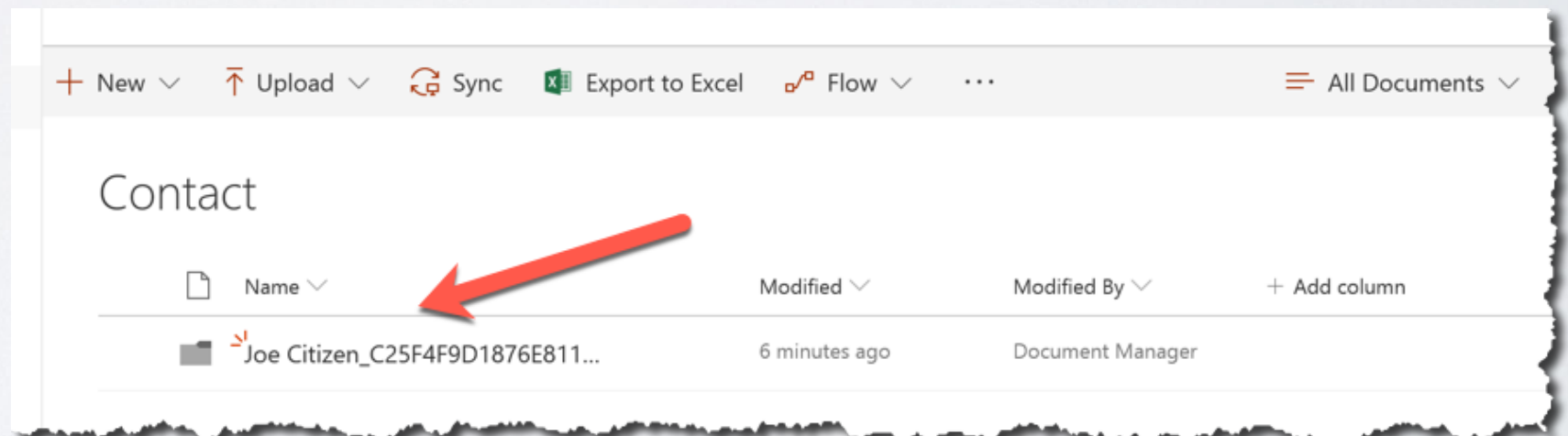
Summary

CONTACT INFORMATION

Full Name *	Joe Citizen
Job Title	HR Specialist
Account Name	HnX Services
Email	joe.citizen@email.com
Business Phone	+61 2 1234 5678
Mobile Phone	0123 456 789
Fax	-----
Preferred Method of Contact	Email

Active

- Sharepoint captures only Name of the Contact record
- Other Contact fields not available in Sharepoint
- Documents contained within do not have metadata



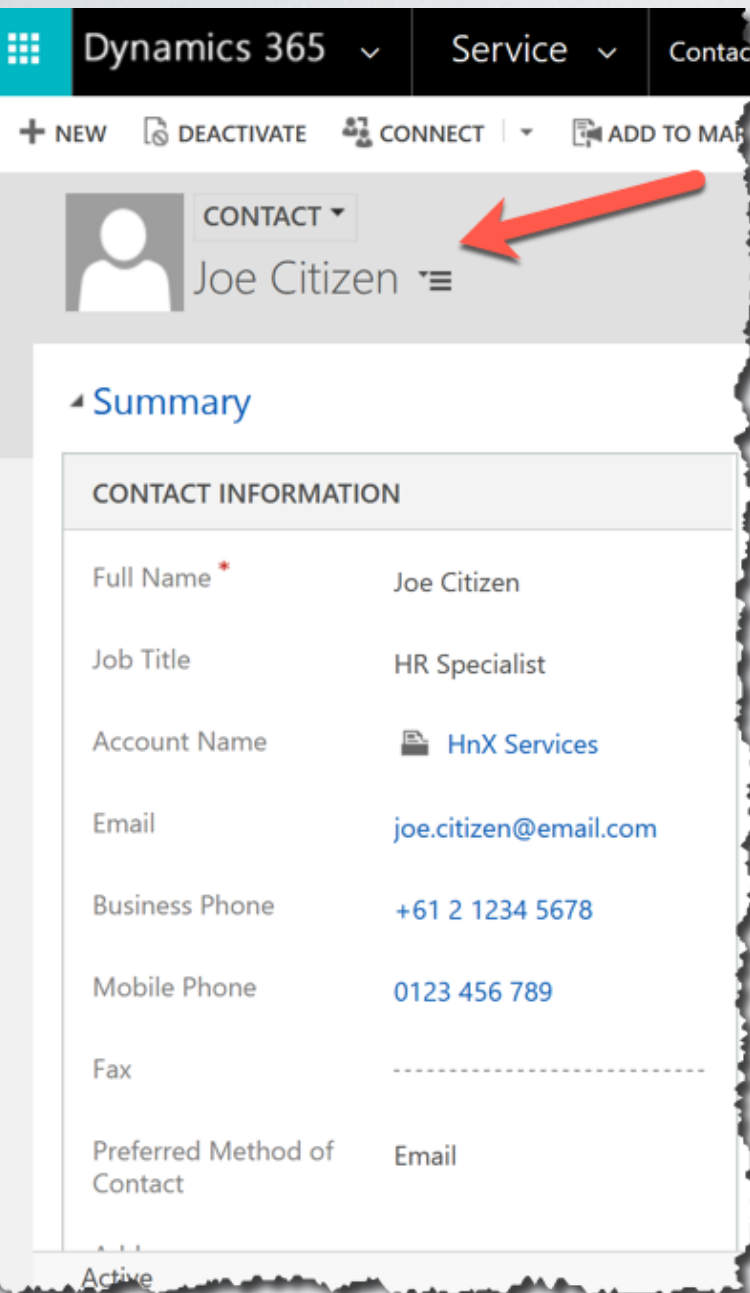
+ New | Upload | Sync | Export to Excel | Flow | All Documents

Contact

Name	Modified	Modified By	+ Add column
Joe Citizen_C25F4F9D1876E811...	6 minutes ago	Document Manager	

SOLUTION #1

Solution to manage metadata migration from Dynamics to SharePoint



Dynamics 365 | Service | Contact

+ NEW | DEACTIVATE | CONNECT | ADD TO MAP

CONTACT | Joe Citizen

Summary

CONTACT INFORMATION

Full Name *	Joe Citizen
Job Title	HR Specialist
Account Name	HnX Services
Email	joe.citizen@email.com
Business Phone	+61 2 1234 5678
Mobile Phone	0123 456 789
Fax	-----
Preferred Method of Contact	Email

Active

- Any Dynamics entity field can be designated as metadata in SharePoint
- Changes are reflected in real time from Dynamics to SharePoint

Contact

Name	Full Name	Job Title	Company Name	Email	Mobile Phone	Business Phone
Joe Citizen_C25F4F9D...	Joe Citizen	HR Specialist	HnX Services	joe.citizen@email.com	0123 456 789	+61 2 1234 5678

- Documents upload to SharePoint will have metadata assigned automatically
- Document can now be integrated with external records management systems

Contact > Joe Citizen_C25F4F9D1876E811A964000D3AD1CAED

Name	Full Name	Job Title	Company Name	Email	Mobile Phone	Business Phone
Application.docx	Joe Citizen	HR Specialist	HnX Services	joe.citizen@email.com	0123 456 789	+61 2 1234 5678
Profile.pdf	Joe Citizen	HR Specialist	HnX Services	joe.citizen@email.com	0123 456 789	+61 2 1234 5678


PROBLEM #2

Inability to manage user access control on SharePoint documents & folders

CONTACT ▾
Joe Citizen

Summary

CONTACT INFORMATION

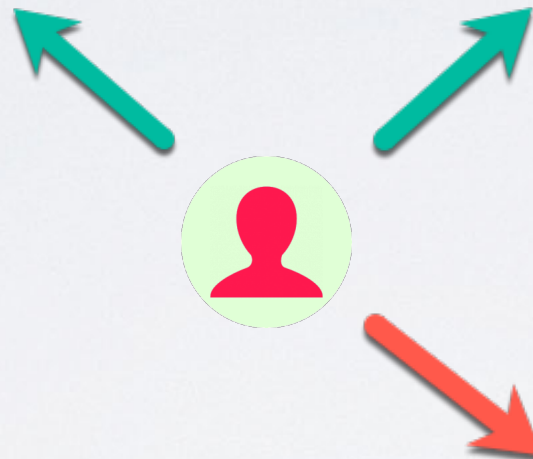
Full Name *	Joe Citizen
Job Title	HR Specialist
Account Name	 HnX Services
Email	joe.citizen@email.com



ACCOUNT ▾
HnX Services

Summary



ACCOUNT INFORMATION



Account Name *	HnX Services
Phone	+61 02 1234 5678
Fax	+61 02 1234 5678
Website	http://www.hnxservices.com





+ New ▾ ↑ Upload ▾ ↻ Sync  Export to Excel  Flow ▾ ...

Contact

 Name ▾	Modified ▾	Modified By ▾	+ Add column
 Joe Citizen_C25F4F9D1876E811...	26 minutes ago	Document Manager	

+ New ▾ ↑ Upload ▾ ↻ Sync  Export to Excel  Flow ▾ ...

Account

 Name ▾	Modified ▾	Modified By ▾	+ Add column
 HnX Services_C3CB8B5C6472E8...	About a minute ago	Document Manager	

- Unmanaged user access control in SharePoint
- User security management is not aligned between Dynamics and SharePoint


SOLUTION #2

Fully managed user access control of SharePoint documents & files

CONTACT ▾
Joe Citizen

Summary

CONTACT INFORMATION

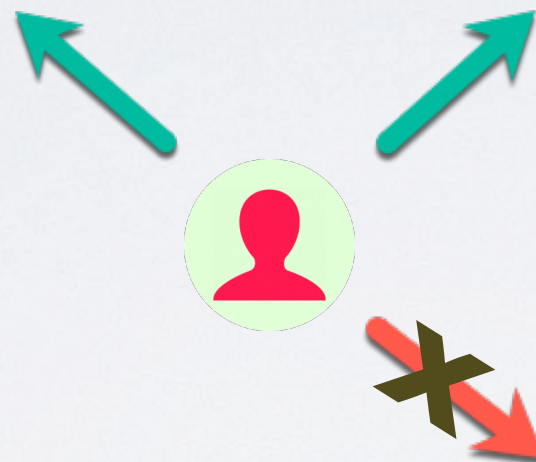
Full Name *	Joe Citizen
Job Title	HR Specialist
Account Name	 HnX Services
Email	joe.citizen@email.com



ACCOUNT ▾
HnX Services

Summary



ACCOUNT INFORMATION



Account Name *	HnX Services
Phone	+61 02 1234 5678
Fax	+61 02 1234 5678
Website	http://www.hnxservices.com





+ New ▾ ↑ Upload ▾ ↻ Sync  Export to Excel  Flow ▾ ...

Contact

 Name ▾	Modified ▾	Modified By ▾	+ Add column
 Joe Citizen_C25F4F9D1876E811...	26 minutes ago	Document Manager	

+ New ▾ ↑ Upload ▾ ↻ Sync  Export to Excel  Flow ▾ ...

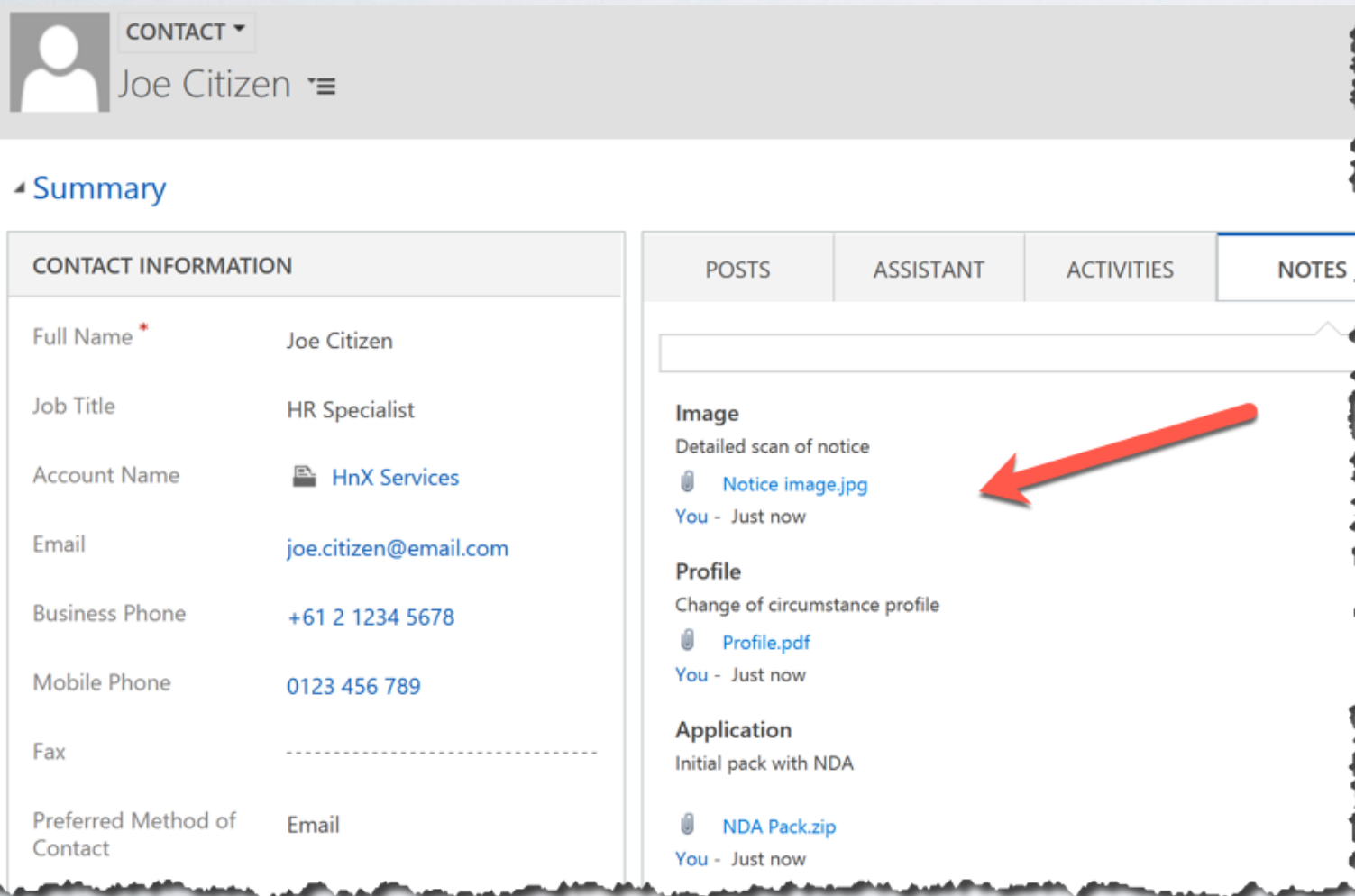
Account

 Name ▾	Modified ▾	Modified By ▾	+ Add column
 HnX Services_C3CB8B5C6472E8...	About a minute ago	Document Manager	


- Granular security access control of SharePoint from within Dynamics
 - Role-based access control in Dynamics is honoured in Sharepoint
 - Security control on Sharepoint when sharing entity records in Dynamics




PROBLEM #3

Inability to control and manage file attachments in Notes and Emails



The screenshot shows a contact record for 'Joe Citizen' in Microsoft Dynamics 365. The 'CONTACT' dropdown is set to 'CONTACT'. The 'Summary' tab is active. The 'CONTACT INFORMATION' section on the left lists details for Joe Citizen, including his job title 'HR Specialist', account 'HnX Services', email 'joe.citizen@email.com', and phone numbers. The 'NOTES' tab on the right shows a list of notes. A red arrow points to the first note, 'Image: Detailed scan of notice', which has a file attachment 'Notice image.jpg' uploaded 'Just now' by 'You'. Below this, a 'Profile' note 'Change of circumstance profile' has a file attachment 'Profile.pdf' uploaded 'Just now' by 'You'. At the bottom, an 'Application' note 'Initial pack with NDA' has a file attachment 'NDA Pack.zip' uploaded 'Just now' by 'You'.

CONTACT INFORMATION	
Full Name *	Joe Citizen
Job Title	HR Specialist
Account Name	 HnX Services
Email	joe.citizen@email.com
Business Phone	+61 2 1234 5678
Mobile Phone	0123 456 789
Fax	-----
Preferred Method of Contact	Email

POSTS	ASSISTANT	ACTIVITIES	NOTES
<p>Image Detailed scan of notice  Notice image.jpg You - Just now</p> <p>Profile Change of circumstance profile  Profile.pdf You - Just now</p> <p>Application Initial pack with NDA  NDA Pack.zip You - Just now</p>			

- Inability to prevent users from upload file attachments in Notes
- In ability to manage the file-types user can upload
- Leads to un-manageable increase to Dynamics database size

SOLUTION #3

CONTACT ▾
Joe Citizen ☰

Summary

CONTACT INFORMATION		POSTS	ASSISTANT	ACTIVITIES	NOTES
Full Name *	Joe Citizen	<p>Enter a note</p> <p>Image Detailed scan of notice</p> <p>***Uploaded 'Notice image.jpg' file migrated to Documents***</p> <p> Notice image.html SYSTEM - Today 8:13:09 AM</p> <p>Profile Change of circumstance profile</p> <p>***Uploaded 'Profile.pdf' file migrated to Documents***</p> <p> Profile.html SYSTEM - Today 8:12:37 AM</p> <p>Application Initial pack with NDA</p> <p>***Unloaded 'NDA Pack.zip' file migrated to Documents***</p>			
Job Title	HR Specialist				
Account Name	HnX Services				
Email	joe.citizen@email.com				
Business Phone	+61 2 1234 5678				
Mobile Phone	0123 456 789				
Fax	-----				
Preferred Method of Contact	Email				
Address	1 Joe Avenue				

- Attachment are automatically migrated to SharePoint
- Associated metadata from parent entity also migrated
- Full control on file types and size limits of attachments
- Granular entity-based controls

+ New ▾ ↑ Upload ▾ ✎ Quick edit ➦ Share 🔗 Copy link ↻ Sync ... ☰ All Documents* ▾ 🔍 ⓘ

Contact > Joe Citizen_C25F4F9D1876E811A964000D3AD1CAED

Name ▾	Full Name ▾	Job Title ▾	Company Name ▾	Email ▾	Mobile Phone ▾	Business Phone ▾
NDA Pack.zip	Joe Citizen	HR Specialist	HnX Services	joe.citizen@email.com	0123 456 789	+61 2 1234 5678
Notice image.jpg	Joe Citizen	HR Specialist	HnX Services	joe.citizen@email.com	0123 456 789	+61 2 1234 5678
Profile.pdf	Joe Citizen	HR Specialist	HnX Services	joe.citizen@email.com	0123 456 789	+61 2 1234 5678

OTHER FEATURES

- Back-ground synchronization of existing records
- Support both OOTB and custom Dynamics entities
- All features are managed from a single simple interface