

ATRIO Project Service
for M&A Corporate

USER GUIDE



TABLE OF CONTENTS

Table of Contents	2
Introduction.....	3
Prerequisites.....	3
Office365 Groups	3
1 Setup.....	4
1.1 Sharepoint Credentials	4
1.2 Product Key.....	6
1.3 Create a Project Template	7
1.4 Create an Office365 Group for Your Project Template.....	8
1.5 Setup Automatic Office365 Group Creation	9
2 Configuration.....	10
2.1 Add documents to your template Office365 group.....	10
2.2 Add Document Links to Your Template Tasks.....	11
2.2 Configuring Document Link Formats in Workflows	12
3 Creating Projects and Updating Project tasks	13
3.1 Creating a Project From a Template	13
3.2 Marking a Task complete	15
Compatibility	15
Support	16
Disclaimer	17

INTRODUCTION

This guide is meant to be used by an advanced CRM user experienced with entities, records, workflows, and solutions. It will walk you through the process of setting up an Office 365 Group for a project template, how to link documents hosted on an Office365 Group to project tasks, and how to setup a process to automatically copy files when a project is created from a template. It will also show you how to mark tasks complete on projects.

PREREQUISITES

OFFICE365 GROUPS

Before to begin the installation process, provision Office365 Groups to your organization. Office 365 Groups is a Dynamics 365 solution you provision from your Office 365 admin portal.

The screenshot shows the Dynamics 365 Administration Center interface. At the top, there's a header with the Microsoft logo and 'Dynamics 365'. Below that is the title 'Dynamics 365 Administration Center'. A navigation bar contains tabs: INSTANCES, UPDATES, SERVICE HEALTH, BACKUP & RESTORE, and APPLICATIONS. The main heading is 'Manage your solutions'. Below this, there's a sub-heading 'Manage your solutions' with a back arrow icon. A message says 'Select a preferred solution to manage on selected instance: Testing M&A Corporate'. A table lists various solutions with columns: SOLUTION NAME, VERSION, AVAILABLE UNTIL, and STATUS. The 'Office 365 Groups' solution is highlighted with a red box. To the right of the table, there's a detailed view for 'Office 365 Groups' showing an 'INSTALL' button, a description, and a 'Learn more' link.

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Live Assist for Dynamics 3...	1.0.0.0	1/1/2050	Not installed
Live Assist for Microsoft D...	1.0.0.0	1/1/2050	Not installed
Live Assist for Microsoft D...	1.0.0.0	1/1/2050	Not installed
Office 365 Groups	2.7.0.0	1/1/2050	Not installed
Organization Insights	1.2.2.0	12/31/2026	Not installed
Preview Community Portal	8.2.0.256	1/1/2050	Not installed
Preview Custom portal	8.2.0.256	1/1/2050	Not installed
Preview Customer Self-Ser...	8.2.0.256	1/1/2050	Not installed
Preview Employee Self-Ser...	8.2.0.256	1/1/2050	Not installed
Preview Partner Portal	8.2.0.256	1/1/2050	Not installed
Project Service Automation	1.2.0.69	1/1/2050	Upgrade available
Social Selling Assistant	1.0.25.0	1/1/2050	Not installed
Versium Predict	6.0.1.0	7/1/2024	Not installed
Voice of the Customer for ...	9.0.823.1	1/1/2050	Not installed

Office 365 Groups

INSTALL

With Office 365 groups, you can collaborate with people across your company even if they aren't Dynamics 365 users. Groups provide a single location to share conversations, meetings, ... (more)

Created by: Microsoft

[Learn more](#)

Also make sure to have the "Atrio Common" solution installed.

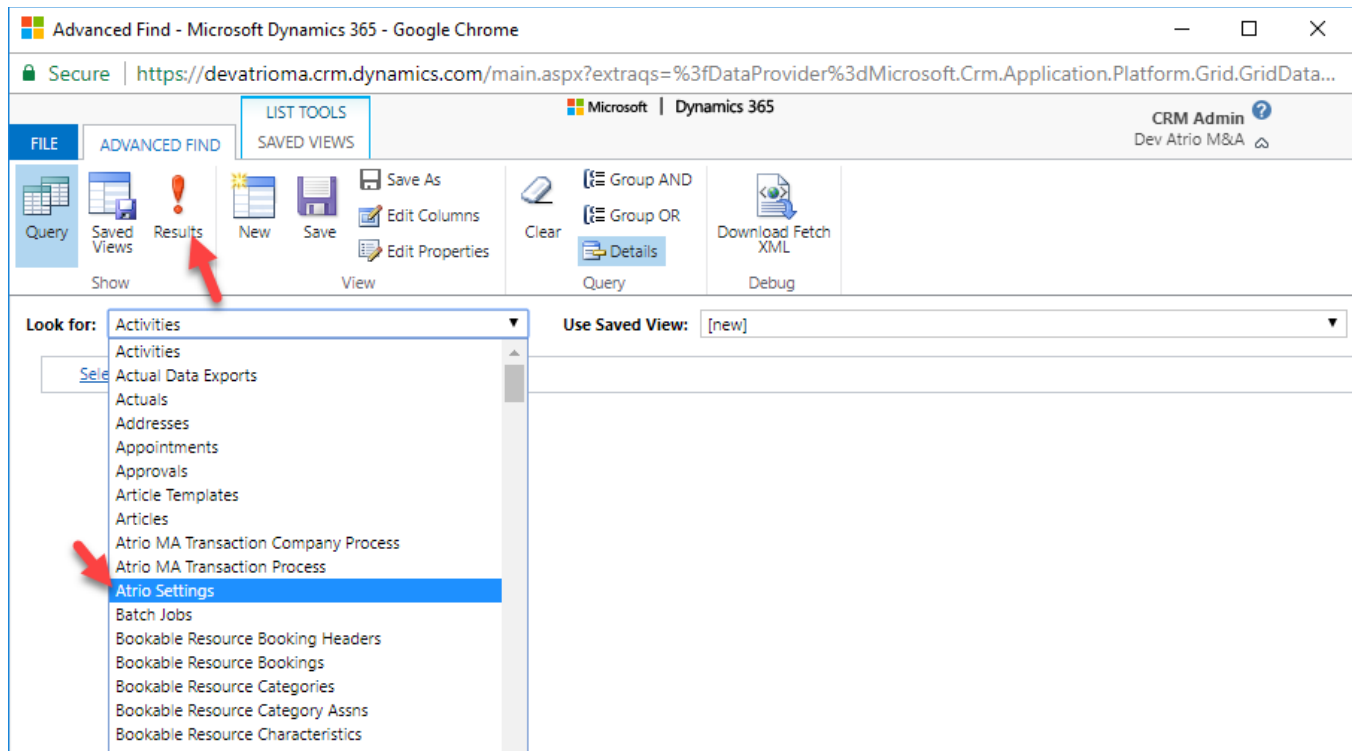
1 SETUP

1.1 SHAREPOINT CREDENTIALS

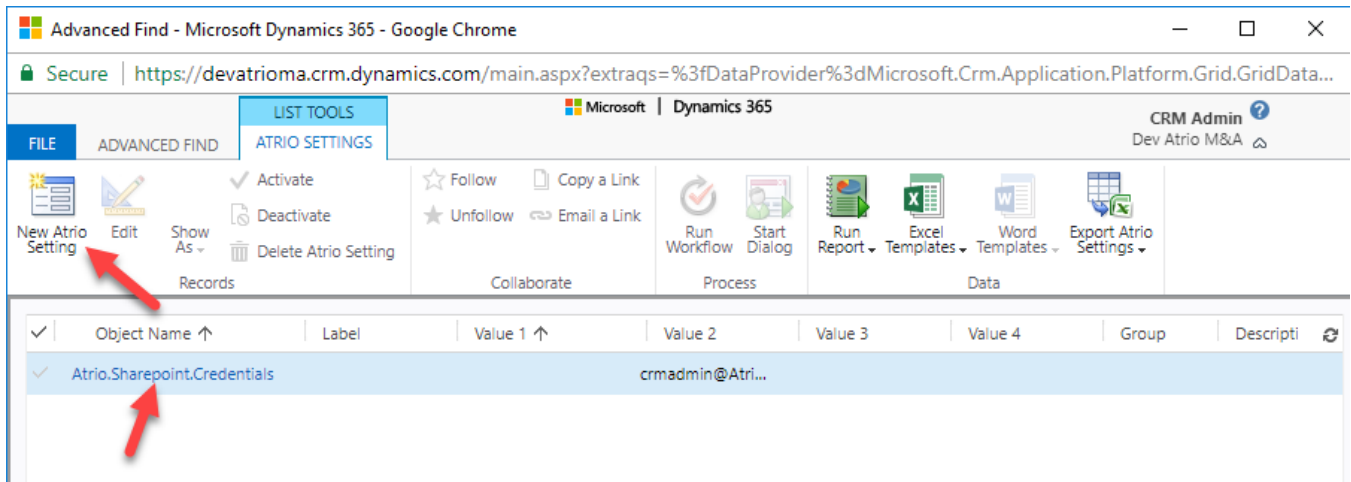
The first step is to setup the credentials we will be using to connect to the Office365 group sites. Perform an advanced find by clicking on the rightmost button shown:



A search window will popup, select the Atrio Settings entity, then hit Results:



If you see a record called Atrio.Sharepoint.Credentials already, select and open that record, otherwise hit the New Atrio Setting button:



A window will popup for creating the new record with several form fields. In the Object Name field, type “Atrio.Sharepoint.Credentials”, in the field Value2, type the username that you are using to login to CRM, preferably an admin account. In the password, type in the plaintext password for this account. This field is secure and the password is not shown or referenced anywhere else.

Then, hit the save and close button.

ATRIO SETTING : INFORMATION

Atrio.Sharepoint.Cre...

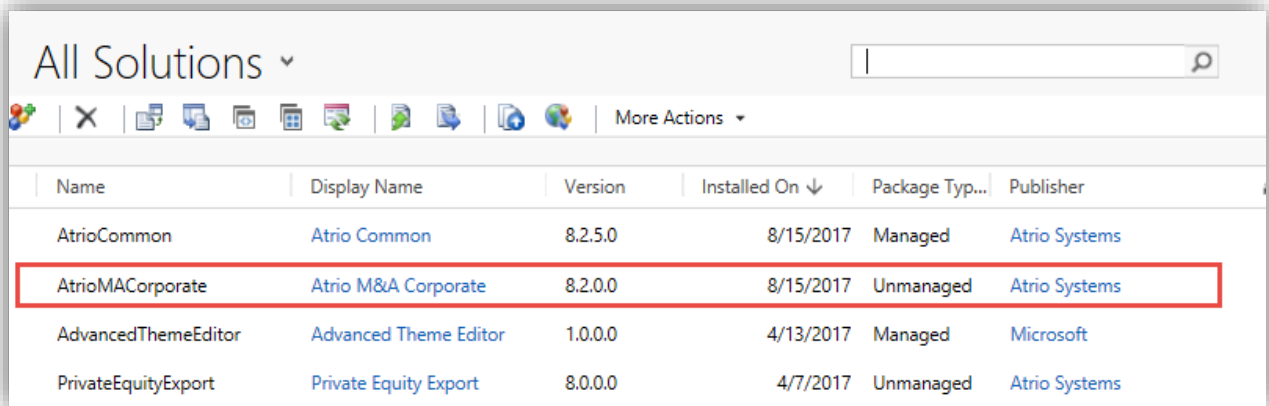
General

Object Name *	Atrio.Sharepoint.Creden	Label	--	Group
Values				
Value 1	--		Value 3	--
Value 2	crmadmin@AtrioMADemo.onmicrosoft.com		Value 4	--
🔑 Password	samplePassword123			

1.2 PRODUCT KEY

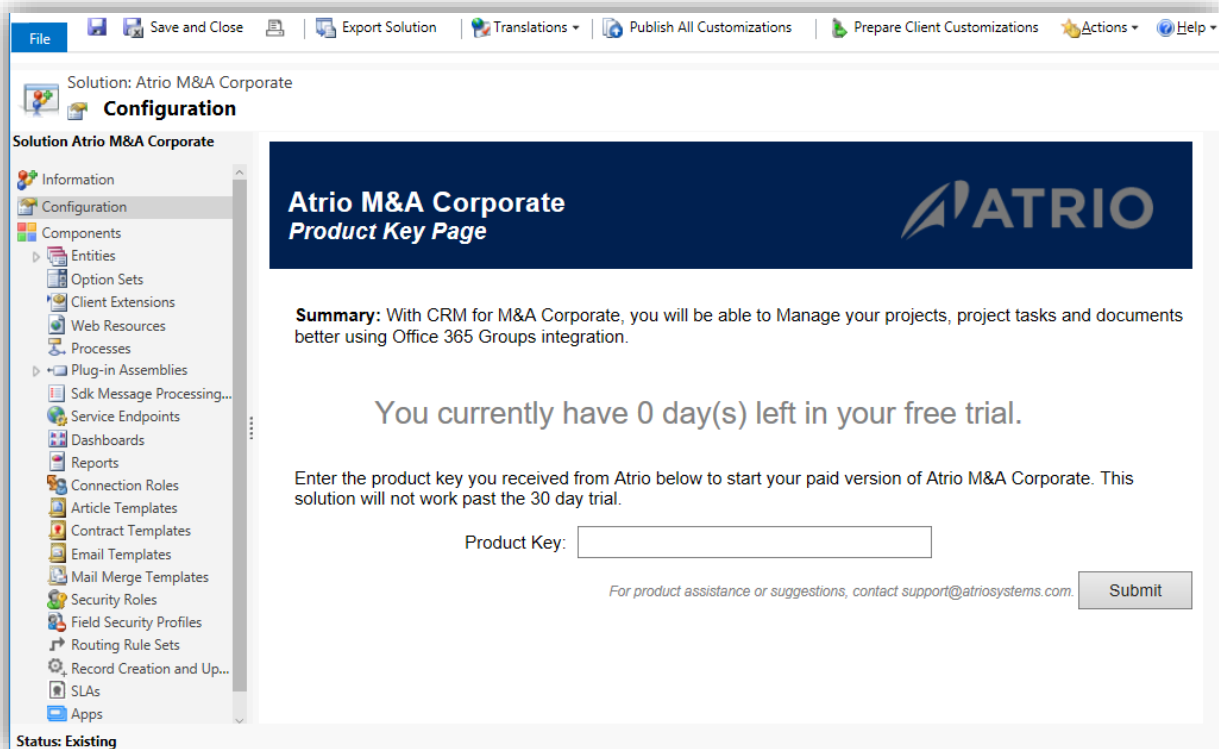
After 30 days of use, ATRIO Project Service for M&A Corporate will no longer work. To enter a purchased product key, follow the steps below.

1. Navigate to the **Solutions** page again and open up the **Atrio Address Auto Complete** solution.



Name	Display Name	Version	Installed On ↓	Package Typ...	Publisher
AtrioCommon	Atrio Common	8.2.5.0	8/15/2017	Managed	Atrio Systems
AtrioMACorporate	Atrio M&A Corporate	8.2.0.0	8/15/2017	Unmanaged	Atrio Systems
AdvancedThemeEditor	Advanced Theme Editor	1.0.0.0	4/13/2017	Managed	Microsoft
PrivateEquityExport	Private Equity Export	8.0.0.0	4/7/2017	Unmanaged	Atrio Systems

2. The **Configuration Page** will appear. Towards the bottom of the page will be a slot for the product key. Type in the product key you received from Atrio and click **Submit**. If you do not have a product key, contact Atrio at support@atriosystems.com to receive one.



File | Save and Close | Export Solution | Translations | Publish All Customizations | Prepare Client Customizations | Actions | Help

Solution: Atrio M&A Corporate

Configuration

Solution Atrio M&A Corporate

- Information
- Configuration
- Components
 - Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
 - Plug-in Assemblies
 - Sdk Message Processing...
 - Service Endpoints
 - Dashboards
 - Reports
 - Connection Roles
 - Article Templates
 - Contract Templates
 - Email Templates
 - Mail Merge Templates
 - Security Roles
 - Field Security Profiles
 - Routing Rule Sets
 - Record Creation and Up...
 - SLAs
 - Apps

Status: Existing

Atrio M&A Corporate

Product Key Page

Summary: With CRM for M&A Corporate, you will be able to Manage your projects, project tasks and documents better using Office 365 Groups integration.

You currently have 0 day(s) left in your free trial.

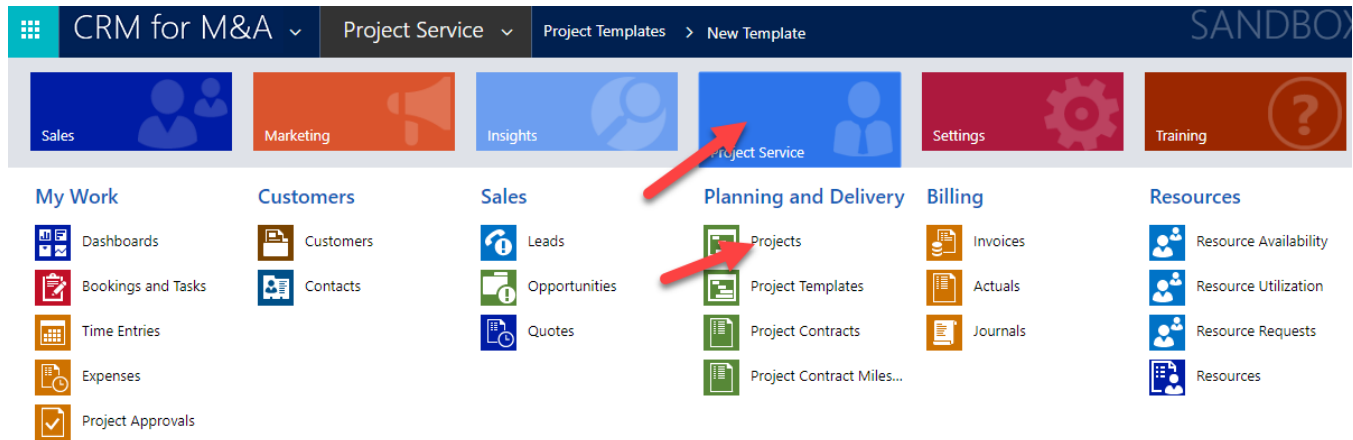
Enter the product key you received from Atrio below to start your paid version of Atrio M&A Corporate. This solution will not work past the 30 day trial.

Product Key:

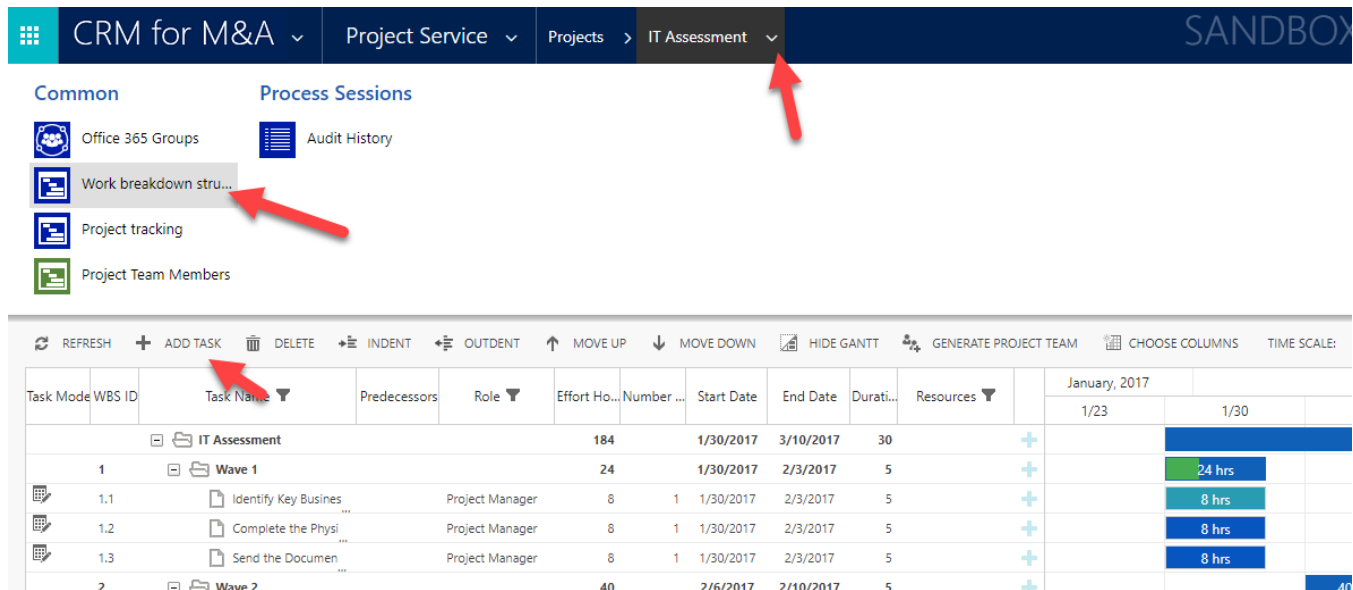
For product assistance or suggestions, contact support@atriosystems.com.

1.3 CREATE A PROJECT TEMPLATE

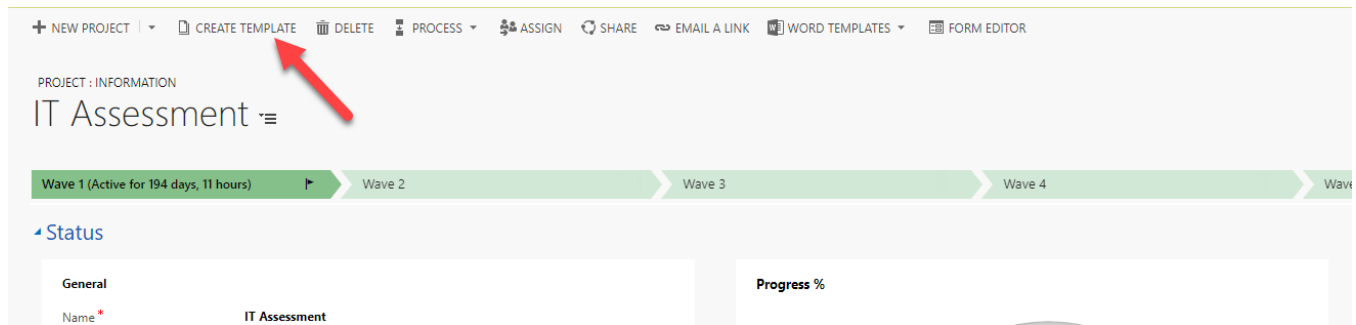
If you already have a project template you would like to use, feel free to proceed to the next step. Otherwise, navigate to Project Service > Projects in the main CRM menu.



Create a new project by hitting the new project button (or use an existing one). Make sure to create any tasks you want to be in the template by using the work breakdown structure. Resources do not need to be assigned to these tasks as they will be blank in the template:



Once you are done creating the project you want to use as a template, save it, then hit the Create Template button. This will create a new project template from the project you just made.

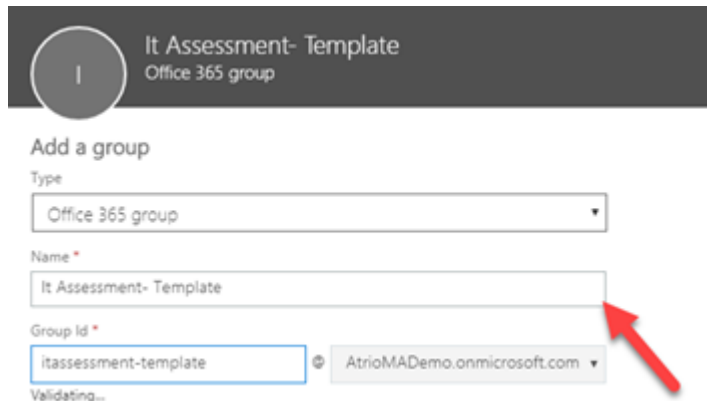


1.4 CREATE AN OFFICE365 GROUP FOR YOUR PROJECT TEMPLATE

Office365 groups are not automatically created for project templates. You will need to create an Office 365 group for your template manually.

In a web browser, navigate to <https://portal.office.com/adminportal/home#/groups>. If you are prompted to sign in, use the same username and password as for your CRM site.

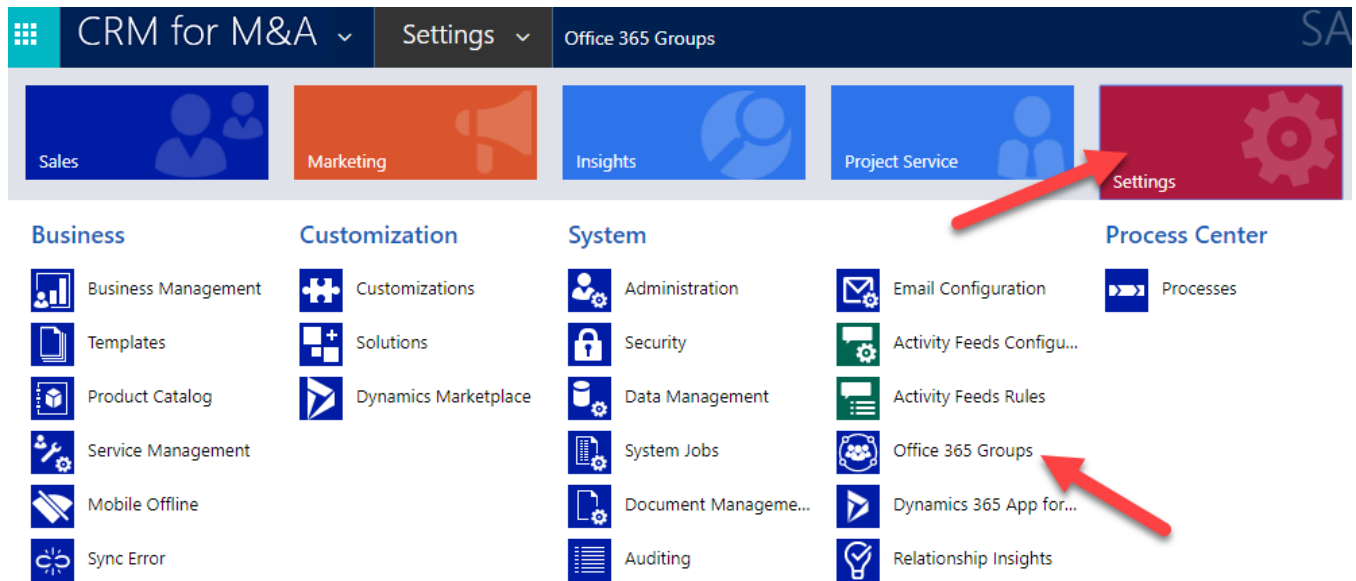
Click the “Add a group” button, a form should appear where you can create a new Office365 group. In the name field, type in the exact name of your project template as it appears in CRM, in our case, “IT Assessment-Template”. The GroupID field should automatically fill in, remember this value for later configuration.



Select the privacy settings you wish to have for your group (public or private), and add a group owner, preferably an admin account. Then hit the add button.

1.5 SETUP AUTOMATIC OFFICE365 GROUP CREATION

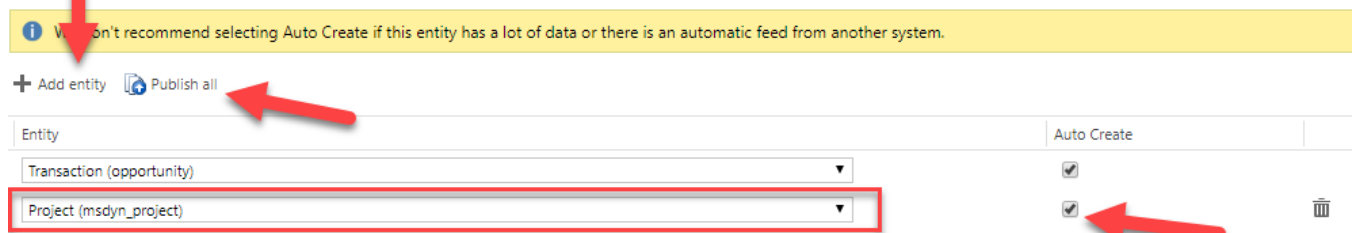
Back In CRM, navigate to Settings > Office 365 Groups:



If you do not see Project (msdyn_project) listed under entities, hit add entity and ensure it is listed and the Auto Create box is checked, then hit publish all.

Office 365 Groups Integration Settings

Use this page to turn on Office 365 Groups integration with specific record types. With groups, you can collaborate with people across your company even if they aren't Dynamics 365 users. Groups provide



2 CONFIGURATION

2.1 ADD DOCUMENTS TO YOUR TEMPLATE OFFICE365 GROUP

Now that all the setup is done for your template, if you want documents to be linked to tasks you need to upload the documents to the Office365 Group you created for your Template. Remember the Group ID for the Office365 Group you created? Navigate to the sharepoint site your office365 groups are hosted on, in Atrio's case it is <https://atriomademo.sharepoint.com/>, and append /sites/<your group id> to the url. For example, the full URL for Atrio's IT Assessment template example that we created earlier is <https://atriomademo.sharepoint.com/sites/itassessment-template>.

This site behaves exactly as a normal Sharepoint online site, you can create document libraries and/or folders and upload the project files you wish to be linked to those locations. In our case, we chose to upload the files to a Document Library called Projects, in a folder called "IT Assessment- Template". Where you choose to organize your files is entirely up to you.

The screenshot displays the SharePoint interface for the 'IT Assessment- Template' public group. On the left is a navigation pane with links to Home, Documents, Notebook, Pages, Projects (selected), Site contents, Recycle bin, and Edit. The main area shows the 'Projects' folder containing the 'IT Assessment- Template' sub-folder. Below this, a table lists the contents of the 'IT Assessment- Template' folder:

Name	Modified	Modified By
Test2	August 2	CRM Admin
Document.docx	August 2	CRM Admin
ErrorDetails.txt	August 2	CRM Admin
TestWord.docx	August 2	CRM Admin

2.2 ADD DOCUMENT LINKS TO YOUR TEMPLATE TASKS

Now that you have documents added to your Template's Office 365 group, you need to link the documents to each task. Navigate to Project Templates and click on your Template to open it up. Open up the Task Updates Section and double click on the leftmost column to open up the Task record.

Task Updates

Group By: (no grouping) ▼

✓	Completed	WBS ID	Parent Task	Project Task Name	Due Date	Role
<input type="checkbox"/>	No	1.1	Wave 1	Identify Key Business Contacts	2/3/2017 11:5...	Project Manager
<input type="checkbox"/>	No	1.2	Wave 1	Complete the Physical Sites Inventory	2/3/2017 11:5...	Project Manager
<input type="checkbox"/>	No	1.3	Wave 1	Send the Document Request List	2/3/2017 11:5...	Project Manager
<input type="checkbox"/>	No	2.1	Wave 2	Complete the Business Application Software Inventory	2/10/2017 11:...	Business Applications
<input type="checkbox"/>	No	2.2	Wave 2	Complete the Server / Infrastructure Inventory	2/10/2017 11:...	Server Infrastructure
<input type="checkbox"/>	No	2.3	Wave 2	Complete the Network Infrastructure Inventory	2/10/2017 11:...	Network Infrastructure
<input type="checkbox"/>	No	2.4	Wave 2	Complete the Security Survey	2/10/2017 11:...	Security
<input type="checkbox"/>	No	2.5	Wave 2	Complete the Telecommunications Survey	2/10/2017 11:...	---
<input type="checkbox"/>	No	3.1	Wave 3	Complete the Client Hardware Survey	2/17/2017 11:...	Client Infrastructure
<input type="checkbox"/>	No	3.2	Wave 3	Complete the Mobile Device Inventory	2/17/2017 11:...	Mobile Device Infrastr...

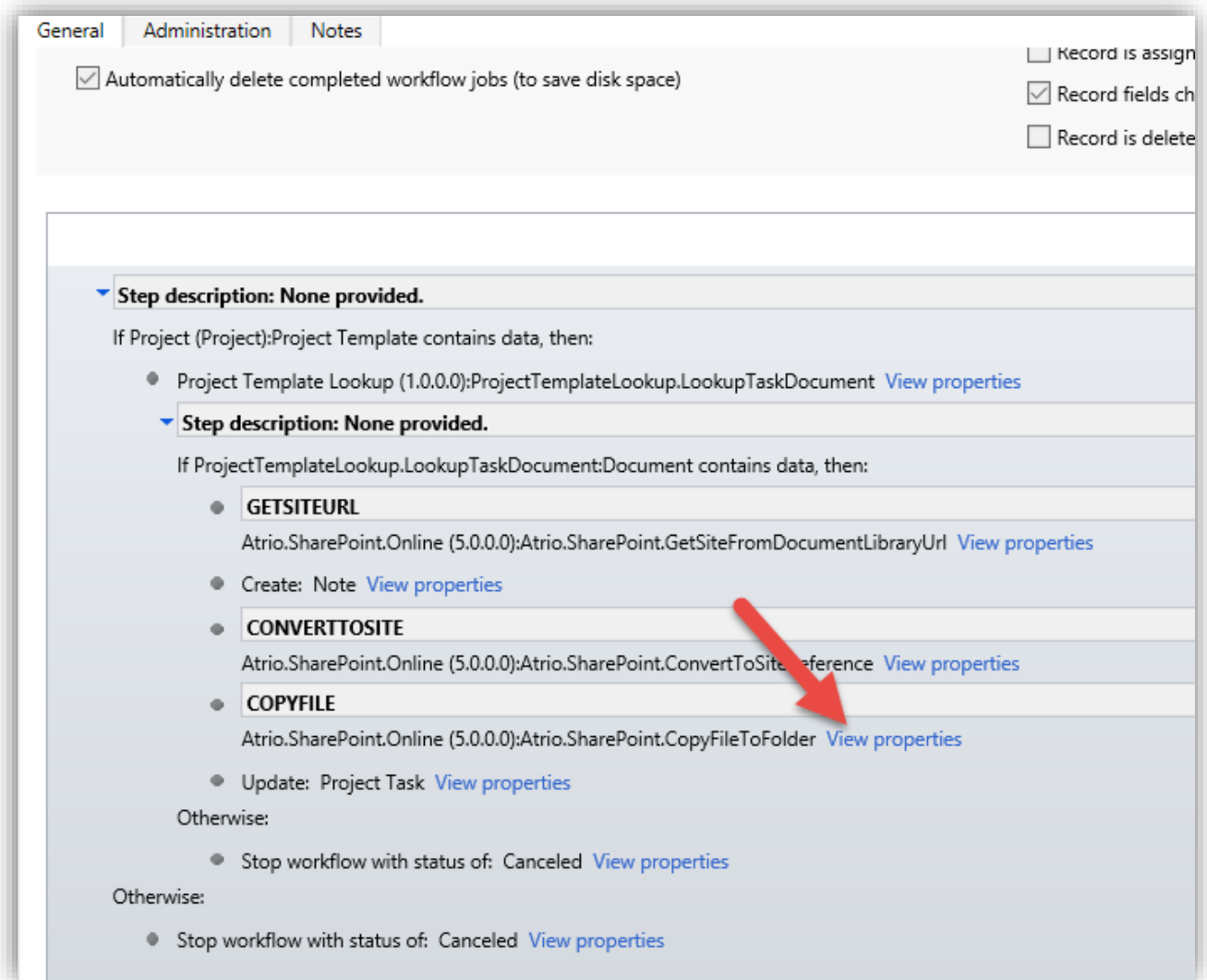
In the Document field, add the direct file url for the file on the office365 site you wish to link. For example, if I wanted to link the file "Error Details.txt" in the folder "Template Files" which is located in the "Projects" document library, the direct url would be

<https://atriomademo.sharepoint.com/sites/itassessment-template/Projects/Template Files/ErrorDetails.txt>

The format for a direct url is <Office365group Url>/<Document Library>/<Folder path>/<file name>. Then, save the task.

2.2 CONFIGURING DOCUMENT LINK FORMATS IN WORKFLOWS

Go to Settings> Processes in the same CRM menu. Open up the “Task Created From Template” process, and open up the properties section of the CopyFileToFolder step:



The screenshot shows the CRM workflow configuration interface for the "Task Created From Template" process. The "General" tab is active, displaying a list of steps. A red arrow points to the "COPYFILE" step, which is highlighted. The "COPYFILE" step is configured to use "Atrio.SharePoint.Online (5.0.0.0):Atrio.SharePoint.CopyFileToFolder".

General Administration Notes

☒ Automatically delete completed workflow jobs (to save disk space) ☐ Record is assigned ☒ Record fields changed ☐ Record is deleted

▼ Step description: None provided.

If Project (Project):Project Template contains data, then:


- Project Template Lookup (1.0.0.0):ProjectTemplateLookup.LookupTaskDocument [View properties](#)
- ▼ Step description: None provided.
- If ProjectTemplateLookup.LookupTaskDocument:Document contains data, then:
- GETSITEURL
Atrio.SharePoint.Online (5.0.0.0):Atrio.SharePoint.GetSiteFromDocumentLibraryUrl [View properties](#)
- Create: Note [View properties](#)
- CONVERTTOSITE
Atrio.SharePoint.Online (5.0.0.0):Atrio.SharePoint.ConvertToSiteReference [View properties](#)
- COPYFILE
Atrio.SharePoint.Online (5.0.0.0):Atrio.SharePoint.CopyFileToFolder [View properties](#)
- Update: Project Task [View properties](#)
- Otherwise:
- Stop workflow with status of: Canceled [View properties](#)
- Otherwise:
- Stop workflow with status of: Canceled [View properties](#)

Make sure that the process is activated and check parameters on the COPYFILE step.

- Setting the Source File URL field to be the Document field in the LookupTaskDocument local value.
- Setting the Target Site field a reference resulted from converting from Office 365 Url field in the Project Task Entity.

The other settings are just describing the document library and folder you are hosting the file in on the Office365 group site, and where you would like to place the copy in the Project Office365 group. Be sure to save and close and reactivate the workflow after any change.

File



Process: Task Created From Template

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Source File URL	Single Line of Text	Required	<code>{Document(ProjectTemplateLookup.LookupTaskDocument)}</code>
Source Document Library	Single Line of Text	Optional	Shared Documents
Source Folder Path	Single Line of Text	Optional	
Target Site	Lookup	Required	<code>{SharePoint Site ID(CONVERTTOSITE:SiteRef (SharePoint Site))}</code>
Target Document Library	Single Line of Text	Optional	Shared Documents
Target Folder Path	Single Line of Text	Optional	
New File Name	Single Line of Text	Optional	
Sharepoint OnPremise	Two Options	Optional	<input checked="" type="radio"/> False <input type="radio"/> True

3 CREATING PROJECTS AND UPDATING PROJECT TASKS

3.1 CREATING A PROJECT FROM A TEMPLATE


Once all the setup and configuration is complete, any time you create a new project from a template the processes bundled with the solution will automatically create an Office365 group for the project and copy all the files from the template to the new group site. It will also update all the document links in the new project tasks to point to the new site.

To create a new project from a template, simply navigate to Project Service>Projects, and hit the New Project button on the left.

Name the project and pick a template to use, then save the project. The office 365 group make take up to a few minutes to create itself.

Pick a Project Template

Project Template

 IT Assessment- Template
7/12/2017 12:09 PM

[Look Up More Records](#)

1 result

[+ New](#)

Status

General

Name *

 --

Description

--

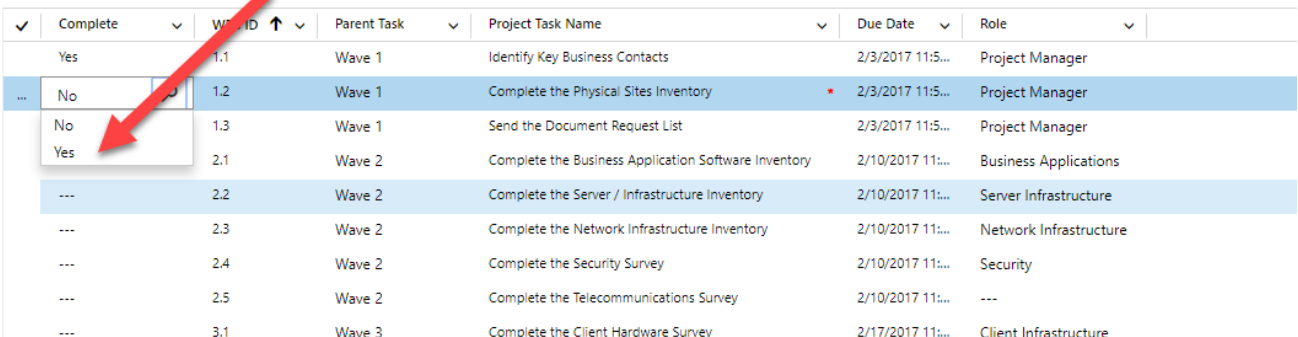
3.2 MARKING A TASK COMPLETE

Marking a task complete on a project is also much easier with the bundled workflows. In the task update section simply change the value in the complete column to read “yes”.

Task Updates

Group By: (no grouping) ▼

✓	Complete ▼	W ID ↑ ▼	Parent Task ▼	Project Task Name ▼	Due Date ▼	Role ▼
	Yes	1.1	Wave 1	Identify Key Business Contacts	2/3/2017 11:5...	Project Manager
...	No	1.2	Wave 1	Complete the Physical Sites Inventory	2/3/2017 11:5...	Project Manager
	No	1.3	Wave 1	Send the Document Request List	2/3/2017 11:5...	Project Manager
	Yes	2.1	Wave 2	Complete the Business Application Software Inventory	2/10/2017 11:...	Business Applications
...		2.2	Wave 2	Complete the Server / Infrastructure Inventory	2/10/2017 11:...	Server Infrastructure
...		2.3	Wave 2	Complete the Network Infrastructure Inventory	2/10/2017 11:...	Network Infrastructure
...		2.4	Wave 2	Complete the Security Survey	2/10/2017 11:...	Security
...		2.5	Wave 2	Complete the Telecommunications Survey	2/10/2017 11:...	---
...		3.1	Wave 3	Complete the Client Hardware Survey	2/17/2017 11:...	Client Infrastructure



COMPATIBILITY

Atrio CRM for M&A is available for most of today’s platforms. It can be used with Outlook 2010, Outlook 2013, and Outlook 2016 as well as through multiple browsers for laptops and desktops. Apps are also readily available to provide access to mobile phones and tablets.

Compatible Browsers:

- Internet Explorer on Windows
- Firefox on Windows
- Safari on Mac OS X
- Chrome on Windows or Google Nexus 10

Mobile Devices with a CRM App:

- Microsoft Dynamics CRM for iPad
- Microsoft Dynamics CRM for Windows 8
- Dynamics CRM for Android Tablets

Supported Phone OS:

- iOS 7.x and 8.x
- Android 4.4
- Windows Phone 8.1

For a full list of supported hardware visit; <https://technet.microsoft.com/en-us/library/dn531131.aspx>

SUPPORT

Please send any product issues or suggestions to support@atriosystems.com.

Atrio Systems, Inc.
6001 N. Adams Rd, Suite 285
Bloomfield Hills, MI 48304
248-594-1500

DISCLAIMER

THIS SOFTWARE IS PROVIDED "AS IS", AND ATRIO SYSTEMS, INC. DISCLAIMS ALL WARRANTIES WITH REGARD TO THIS SOFTWARE INCLUDING ALL IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. IN NO EVENT SHALL ATRIO SYSTEMS, INC. BE LIABLE FOR ANY SPECIAL, INDIRECT, OR CONSEQUENTIAL DAMAGES OR ANY DAMAGES WHATSOEVER RESULTING FROM LOSS OF USE, DATA OR PROFITS, WHETHER IN ACTION OF CONTRACT, NEGLIGENCE, OR OTHER TORTIOUS ACTION, ARISING OUT OF OR IN CONNECTION WITH THE USE OR PERFORMANCE OF THIS SOFTWARE.