



White Paper

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Aim:

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.

Features:

- 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.

Supported Versions

Versions: Microsoft Dynamics 365 v9.x and above. Deployment Models: Dynamics 365 Online and On-Premises with IFD

Who needs it?

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.

Configure Connectors

Configure connector to enable syncing with SharePoint security model.

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Connector Type	* SharePoint
Default Connector	
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Auth-Type	SharePoint Sites Default Site With the second seco
	+ 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.

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Entity Configuration

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

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

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Hierarchy Structure

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

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Entity Name *	Opportunity	
Attachment Action	Move	
Override Files		
Folder Structure Field *	Account	

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Security Templates

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

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Bulk Migration Jobs	Delete Files	0	View Files					
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Bulk Migration Job

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

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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.

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Direct Upload of files from Home Page

Upload files directly from home page for selected records.

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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 unwanted files from SharePoint.

Preview files stored in SharePoint before downloading.

SharePoint Security Sync Tool

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

\$	SharePoint Security Sync	? – ×
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Security Groups Folder Security Fail	ed Sync Entity Logical N Iead account	lame
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Sync Details of User with User Level Privilege

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

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Log

View 'Log' entity for errors occurred during the functioning of SharePoint Security Sync.

Contact Us:

INOGIC (MUMBAI - INDIA)

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