## What is DocMan?

DocMan is an extension for Dynamics 365 that aims to be a seamless connection between Dynamics and the storage of Documents in SharePoint.

Often Dynamics Customers will have a license to SharePoint as part of their Subscription, but this can be difficult to use as a single solution between CRM Records, Documents and Emails.
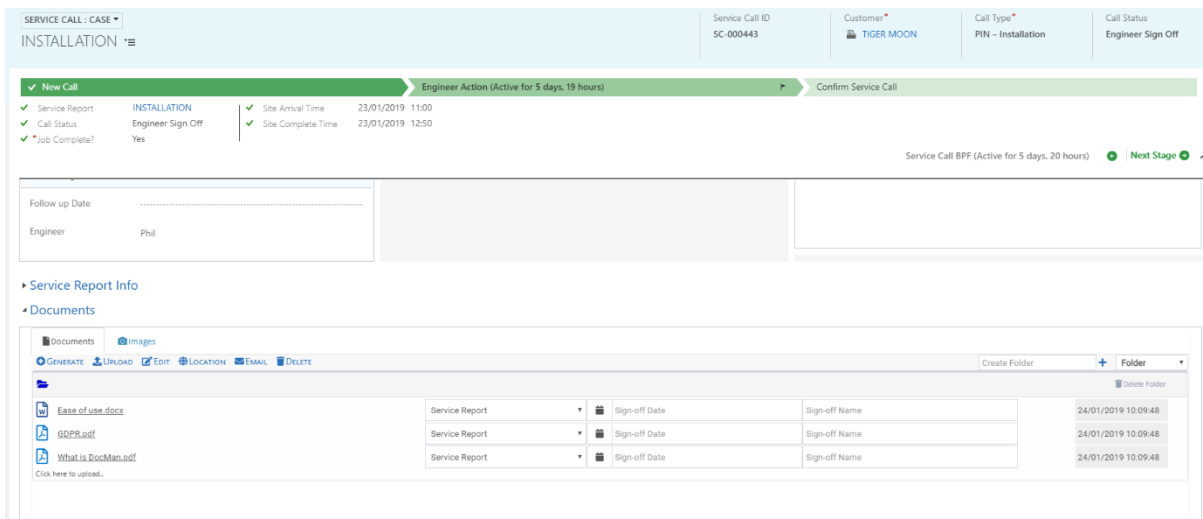
DocMan connects these systems together for a simple, efficient use between Dynamics and SharePoint to get the best from both products.

From a User perspective, this empowers users to simply drag and drop documents into CRM, set the type of document, manage metadata and then share documents with 3rd parties via email or portal.
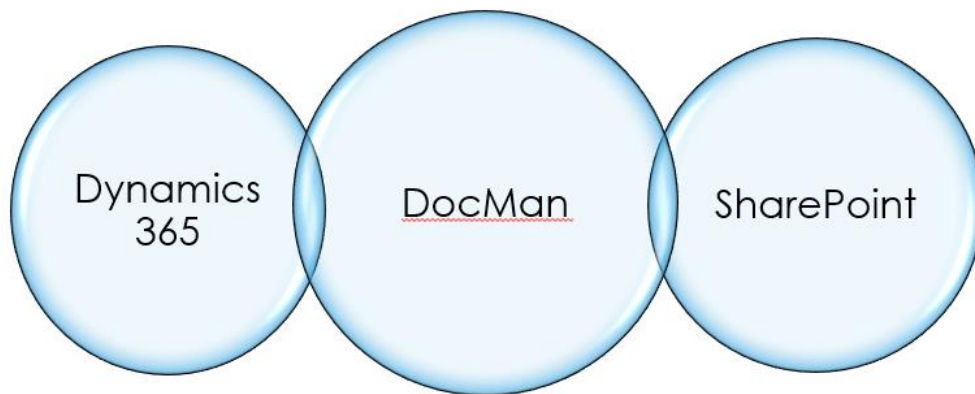
How do I view Documents for a Record in CRM?

We search for and open a Record in Dynamics and we will be presented with the list of Documents held for that Record.
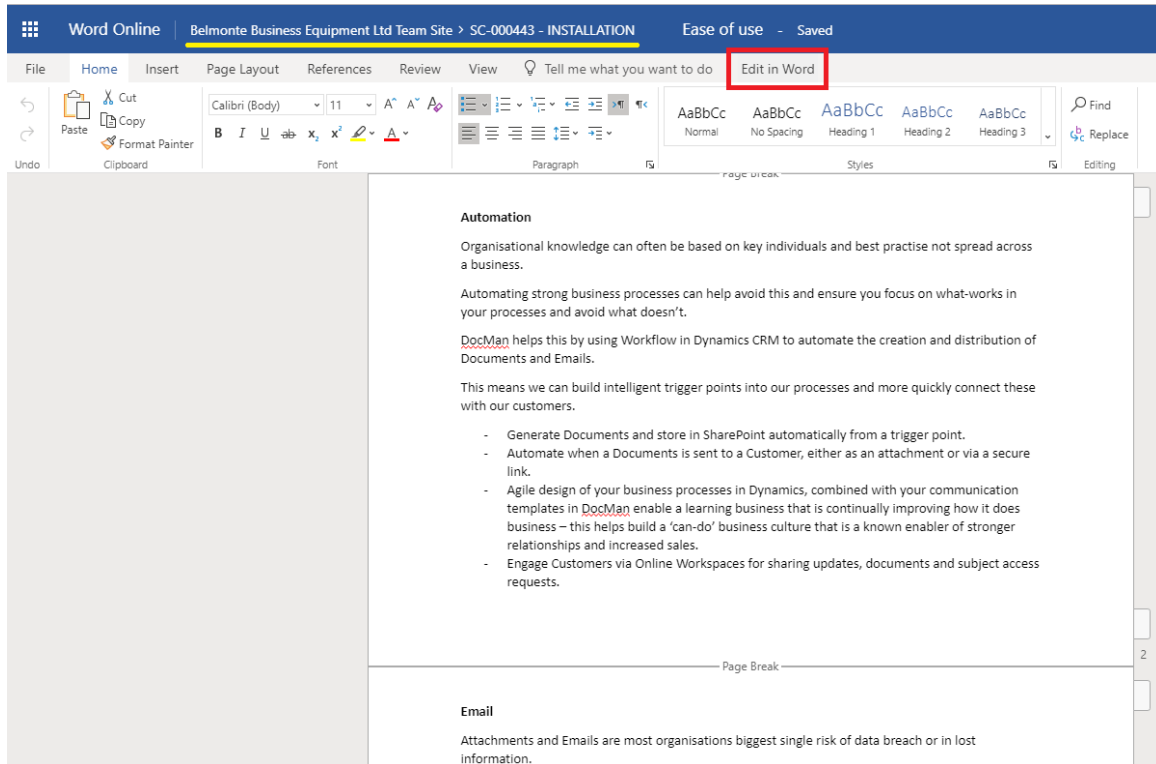

Figure 1 - Viewing our SharePoint Documents in Dynamics

How do I open a Document?

Clicking the left-hand icon for any of the Documents will open the Document in a new window.

For Office Documents, this will open the editable view within Office Online.

Within this view of an Office Document, we can see the ==Path== of the Document in SharePoint – and have the option to **Edit in Word** to open the same Document in our Desktop version of Microsoft Office.

For Images or PDFs, these will be opened as Read-Only within our Browser.

For other files, this will present us the option to download the document.

If in Office we click SAVE AS, then this will let us Save a Copy of the Document directly into the same SharePoint Location.
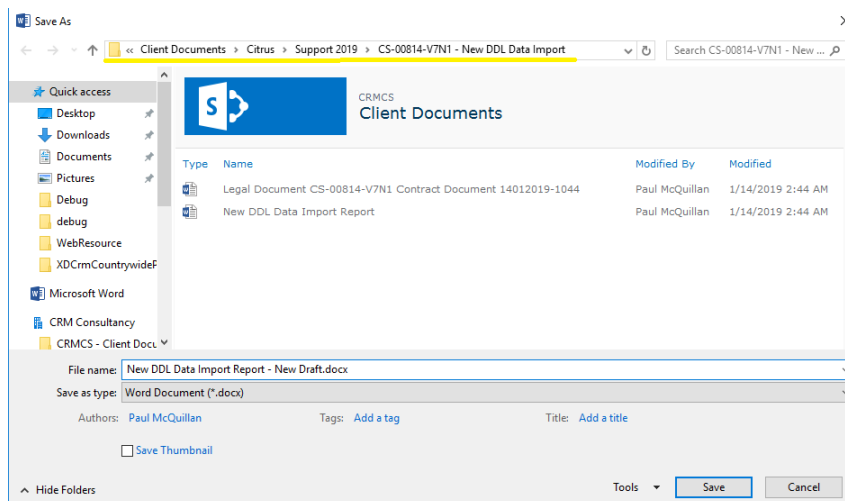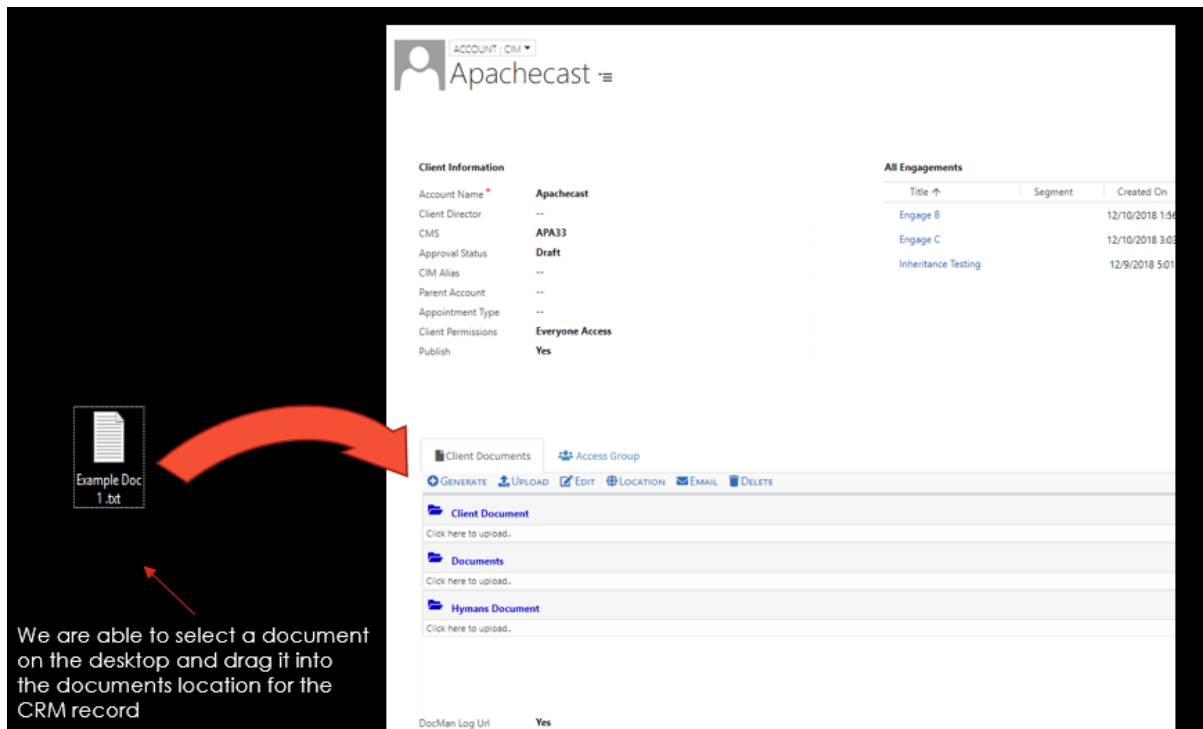

Figure 2 - Saving a Copy of the Document into SharePoint from Word

How do I upload a Document?

The easiest way to upload a Document is to drag the Document from our Desktop and drop into the Panel in CRM:

We can also Click here to Upload to open a selector and choose which Document to upload.
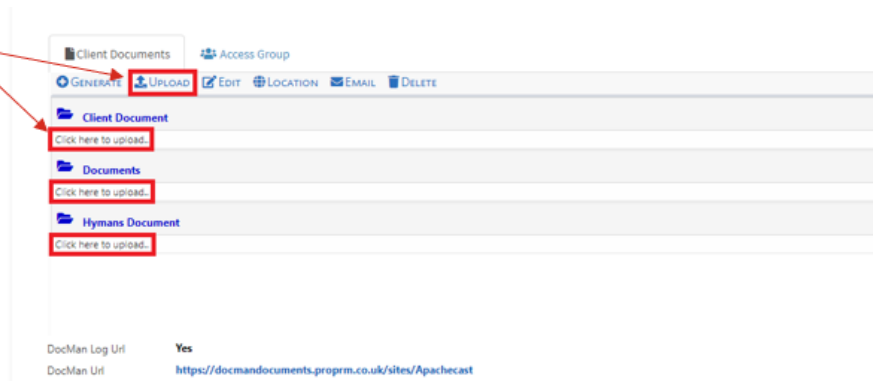
Each Document will then appear in the list as 'Uploading..' whilst the Document saves into SharePoint, and once finished uploading will appear in the Panel as a Document connected to that CRM Record.

NOTE: As soon as the Document is shown as 'Uploading', we can navigate away from the CRM Record or Document Panel as the upload will continue regardless.

Can I upload multiple Documents?

Yes – we can drag and drop groups of documents, or select multiple documents in the selector.

How do I access SharePoint directly?

Whenever we are working within Dynamics, we can view the Panel of Documents and then click the LOCATION button to open that specific Location in SharePoint.
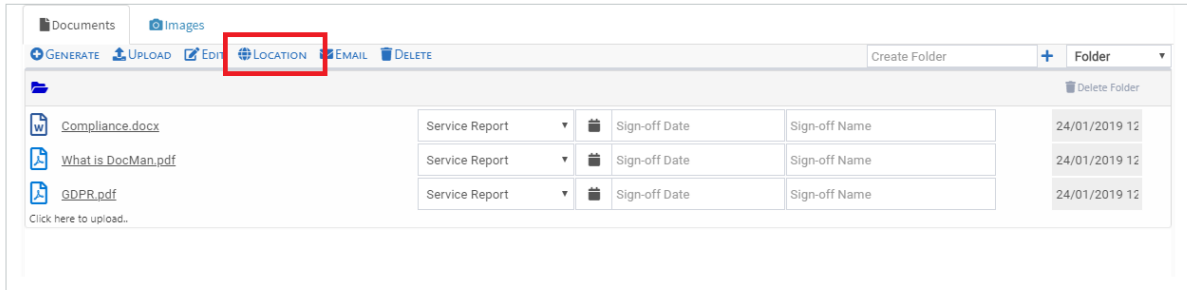
This will give us the full view of SharePoint in a new Tab:
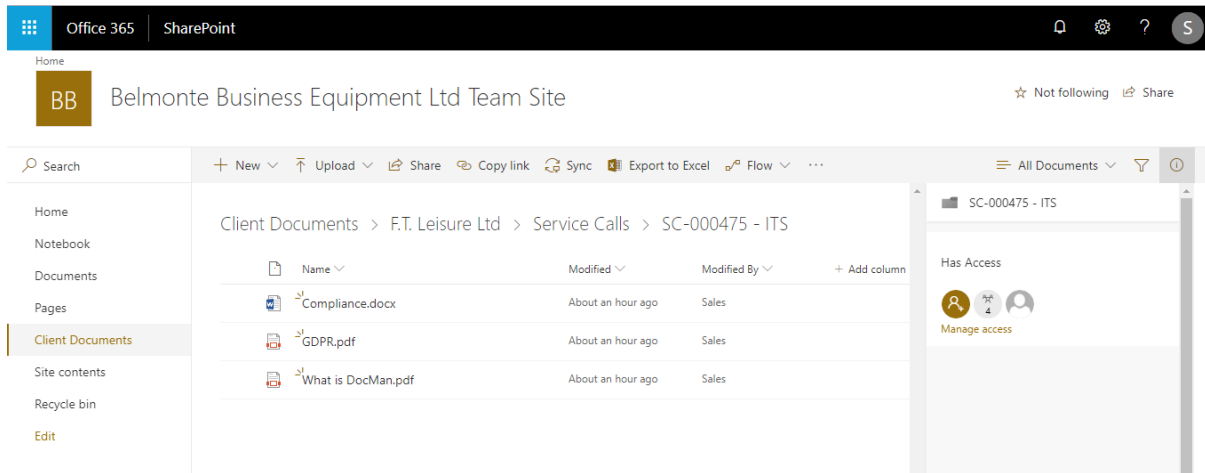
Here we can see the structure in SharePoint that DocMan is creating for the Records tracked in CRM.

This structure being entirely bespoke to suit how you want to store Documents between Dynamics and SharePoint for ease of use, and good governance.

This aims to combine the powerful Search and Workflow capabilities of CRM with the Strong Storage options in SharePoint and Teams.

Grouping our Documents

DocMan shows the list of Documents divided into Groups.

The most obvious way of thinking of these Groups is viewing by Folder – this will show the Documents Folder by Folder.

We can then upload Documents to a specific Folder by clicking the 'Upload to this Folder' link, or dragging a Folder from the Desktop into that Folder.

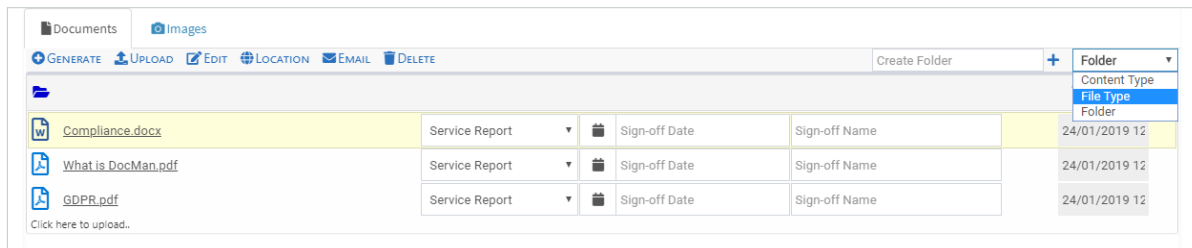The drop-down selector in the top-right of our panel allows us to change how the Documents are being Grouped.

Grouping allows us to quickly organise our stored information in the CRM record into any of the following:

• **Folder** – Show me the information grouped in folders, much like our standard File System.

• **File Type** – Group the Documents by the File Type to keep Word Documents, PDF's, PowerPoint Presentations separated by that File Type.

• **Content Type** – Divides the Documents by the Content Types that we have configured for that area of CRM; this can be very useful for managing the Documents by the Type of Document involved, and give us a quick way of uploading new Documents into that Content Type.

We can also configure DocMan to have additional Grouping Options here:

• **Metadata** – if we track a Field for our Documents that we then want to Group By, we can configure DocMan to have this as a particular Grouping option and Group Documents by this Metadata instead.

• **CRM Record** – we can also configure a DocMan Panel to show the Documents of Multiple CRM Records, and if we do this, DocMan will present us with a further Grouping option to divide the Documents by which CRM Record is involved.

> **Note for Administrators:** A longer explanation of this Group-by-CRM-Record functionality can be found here: **http://www.crmcs.co.uk/content/using-docman-for-a-documents-roll-up-view-in-dynamics.aspx**

These last two types of Grouping are slightly more advanced but can be configured by the DocMan Administrator as options for viewing Documents in that particular area of CRM.

What happens when I upload a Document?

Each time we upload a Document, this does the basic act of uploading the Document into the SharePoint Location for the CRM Record we are looking at.

But this also sets a number of Fields within the Document as the Document Metadata – this is done depending on the rules defined in DocMan.

CRM Field to Document Metadata – this sets a Field in the Document based on a Field or combination of Fields within CRM, say to set the Quote Number of the Quote record in CRM into the Metadata of the Document.

Content Type – on upload, DocMan can check a number of these Rules to determine what Content Type should be assigned for the Document.

Workflow – DocMan can be configured to trigger a New CRM Action or Workflow on upload of a Document to that type of CRM Record.

How are these Rules defined?

DocMan supports a number of rules that define what should happen when a Document is uploaded for a Type of CRM Record, or a Document of a particular Content Type is uploaded – these Rules can be configured by a DocMan Administrator using the DocMan Configuration Area in the Dynamics Settings.

What is the Content Type?

Each Document has a Content Type – this defines the Type of Document we are tracking, and so what Metadata or Workflow we want attached to a Document of that Type.
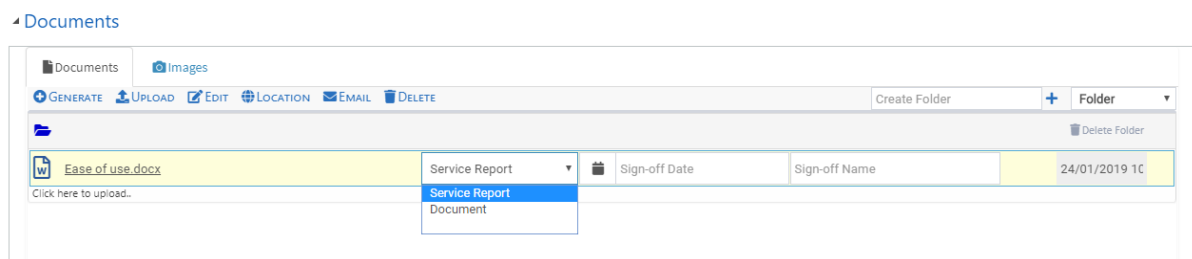

Figure 3 - Changing the Content Type for a Document

In the above example, we can choose whether the Document is a **Service Report** or a generic **Document** – and by choosing Service Report, this presents us with follow-up fields for the Sign-off Date and Sign-off Name. These Fields are the Document Metadata.

> **Note for Administrators:** DocMan and SharePoint allow us to define a number of Content Types for how we track Documents, a longer explanation of how this is done and synchronised between Dynamics and SharePoint can be found here: http://www.crmcs.co.uk/content/publishing-content-types-from-dynamics-to-sharepoint.aspx

Do I need to specify a Content Type for each of my Documents?

No – you will often find that uploading a Document will give the Document a Default Content Type. (based on the Type of Record you are uploading the Document for, or by DocMan analysing the Title or Content of the Document)

But sometimes specifying a Content Type can help us keep our Documents organised – and driving any logic from Documents will typically start from the Content Type.

Can I Delete Documents after being Uploaded?

Yes – we can select a Document by clicking into that Document in the Panel.

This will highlight the Document to show us that we have it selected.

With a Document selected, we can then click DELETE and this will send the Document to the SharePoint Recycling Bin – and so remove from our view here.

Want to delete multiple documents? Then hold CONTROL down as we click to highlight a Document, this will highlight multiple Documents as we click, and then clicking DELETE will delete all those highlighted.
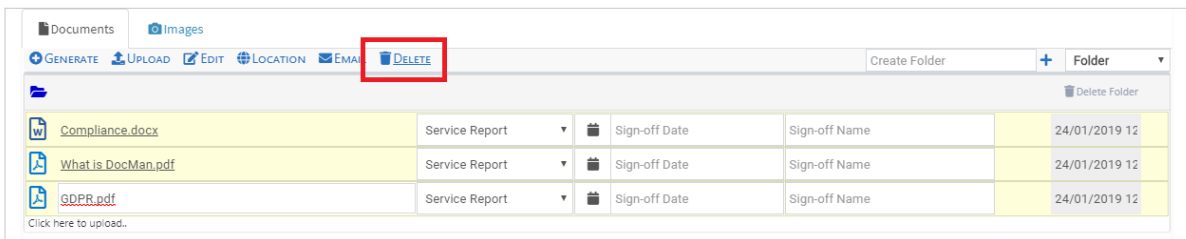

Figure 4 - Clicking Delete here will remove all 3 of the selected Documents and banish them to the SharePoint Recycling Bin

CRM**CS**

How do I Email Documents from CRM?

We can highlight one or more Documents in the Panel and then click EMAIL to present us with three options for how to share the Documents over Email.

Email Link – This puts a link directly into SharePoint in the Email rather than an Attachment – this is only useful if the Recipient of the Email has access to SharePoint, and so allows us to email documents internally without sending as Attachments.

Email as External Link – This puts a link into the email, but gives external users the ability to download the Document. The Link in this Email is (by default) valid for the next 7 days. This allows us to share the Document(s) externally without sending as Attachments.

Email as Attachment – The more traditional way that attaches each of the highlighted Documents as an attachment to the Email.

All three options will open the Email in Dynamics in a new Window – where we can specify the **To** Recipient, **Email Subject** and **Body** before sending out.
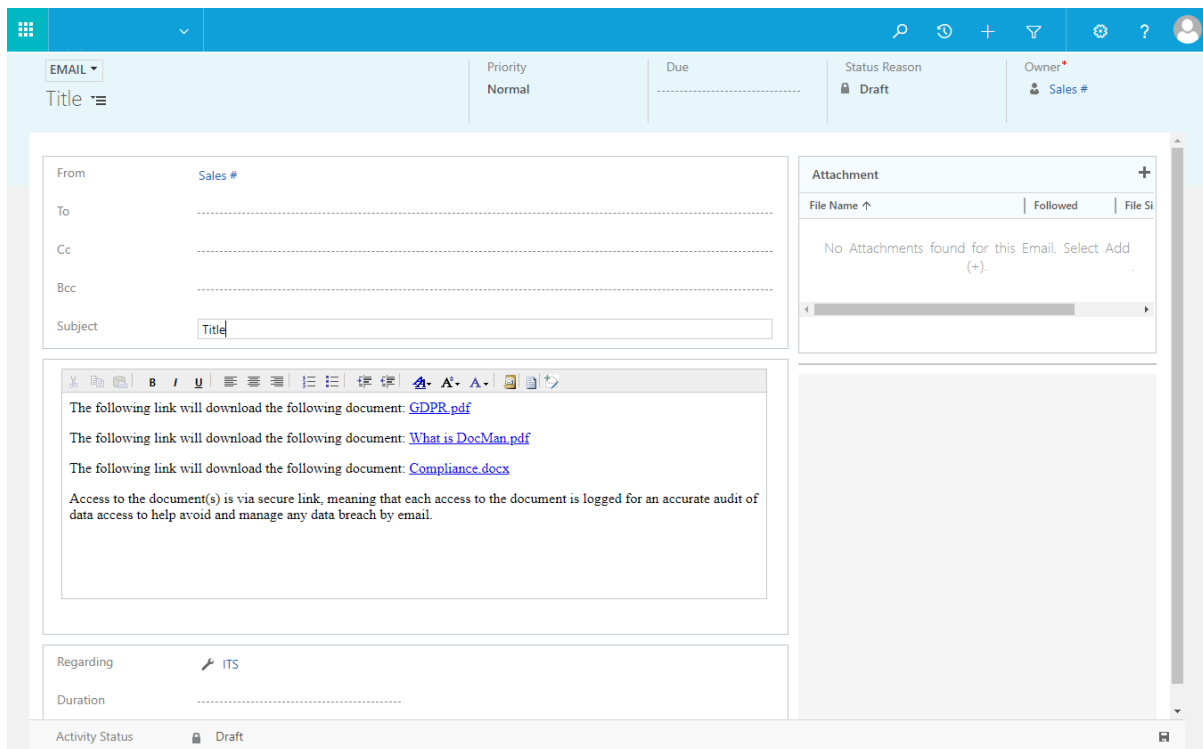

Figure 5 - Clicking Email as External Link to create a new Email in Dynamics with links to the selected Documents

Note for Administrators: The To, From and CC Recipients of the Email can be configured with Default Values to increase the speed for Users emailing Documents from DocMan. The Subject and Email Template can similarly be configured.

Does DocMan work with the normal In-Dynamics Document View?

Yes – DocMan works the way Dynamics does for handling Document Locations in SharePoint.

This means the usual view of Documents in Dynamics is available to us:

This native Dynamics approach can be used alongside or instead of the DocMan Panel.

The functionality here is not as comprehensive as DocMan but allows for more standard functionality rather than the custom Panel.

That's the basics! What else is possible?

At its heart DocMan is about connecting Dynamics with SharePoint for good management and governance of Documents, the prevent endless searches of the Outlook Inbox or a loosely organised fileshare to find useful documents and key business intelligence.

These basics help us put this in practise – giving us a common well structured file storage that works in tandem with the records we track in CRM.

Going beyond the basics, we can look at:

- **Generating Documents -** DocMan generating new Documents for us based on the Templates in Dynamics or more advanced Document Generation Tools such as Xperido.
- **Document to Workflow -** Triggering Workflow from a Document of a particular Content Type being uploaded or generated.
- **Cognitive Services** - integration with Machine Learning Services to allow Dynamics to read the content of the Document or PDF on upload, and then set various Metadata Workflow or Fields in CRM accordingly.