

P13: Integrating SharePoint with Dataverse

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Context

Item	Detail
Tag	Vertical Patterns Power Platform Admin Center
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Version Control	V1.0
Application Use Case	Enable document management by integrating SharePoint with Dataverse
Reference Usage	Managing documents in Dataverse using SharePoint integration

Story Behind The Pattern

Item	Detail
The Problem	Storing and managing documents directly in Dataverse can be inefficient, and users need a seamless way to manage documents using SharePoint while working in Dataverse.
The Solution	Integrate SharePoint with Dataverse to enable document management functionality, allowing users to store, access, and manage documents in SharePoint directly from Dataverse.
Dependencies	Power Platform Admin Center access, SharePoint site, Power Pages site (optional), Dataverse environment, permissions to manage integrations and table permissions.

The Pattern

Method: Integrating SharePoint with Dataverse

Here's a step-by-step guide to integrate SharePoint with Dataverse, configure document management, and ensure proper permissions and functionality:

1. Access the Power Platform Admin Center
 - Log in to the Power Platform Admin Center (admin.powerplatform.microsoft.com) using your admin credentials.
 - Ensure you have the necessary permissions to manage environments, integrations, and table permissions.
2. Navigate to Environments
 - Use the navigation menu on the left sidebar to go to the Environments section.
 - Select the environment where you want to enable SharePoint integration (e.g., "DSFA - DEV - REBUILD A").
3. Enable Document Management Functionality
 - In the selected environment, go to Settings in the sidebar.
 - Navigate to Integration > Document Management Settings.
 - Enable the document management functionality for your environment by toggling the relevant option to "On" or checking the box to enable it.
 - Save the changes to activate document management capabilities.
4. Set Up SharePoint Integration
 - In the Power Platform Admin Center, under Resources, choose Power Pages sites.
 - Select the Power Pages site where you want to enable SharePoint integration.

- Click Manage from the main menu to open the site settings.
 - On the site information page, locate the Services section.
 - Toggle the SharePoint Integration control to the Yes position.
 - Confirm the action by clicking Enable in the confirmation window that appears.
 - Verify that SharePoint integration is now enabled for the site.
5. Configure Document Management for Tables
- Return to the Power Platform Admin Center.
 - Go to Settings > Integration > Document Management Settings.
 - Select the entities (tables) you want to enable for SharePoint document management (e.g., Accounts, Contacts, Opportunities).
 - Enable document management for these entities by checking the boxes next to each table.
 - Specify the SharePoint site URL where documents will be stored (e.g., "<https://yourcompany.sharepoint.com/sites/DataverseDocs>").
 - Configure the folder structure if prompted (e.g., create folders based on table names or record IDs).
 - Save the settings to apply document management to the selected tables.
6. Set Up Table Permissions
- Open Power Apps (make.powerapps.com) and navigate to the environment you're working in.
 - Go to the Solutions area and open the solution containing your tables (or use the default solution).
 - Under Security Roles, configure the appropriate permissions for the tables enabled for document management:
 - Grant Read, Write, and Append permissions for the selected tables (e.g., Accounts, Contacts).
 - Ensure SharePoint Integration permissions are enabled for relevant roles (e.g., "SharePoint Document Management" privilege).
 - Assign these security roles to the appropriate Web Roles in Power Pages (if using a Power Pages site) to ensure users have access to manage documents.
 - Save and publish the changes.
7. Test the Integration
- Open a record in Dataverse (e.g., an Account record) that has document management enabled.
 - Navigate to the Documents or Files tab within the record.
 - Upload a test document (e.g., a PDF or Word file) and verify that it is stored in the associated SharePoint site.
 - Check the SharePoint site to confirm the document is saved in the correct folder structure.
 - Perform actions like downloading, editing, or deleting the document from Dataverse to ensure the integration works seamlessly.
8. Monitor and Maintain the Integration
- Regularly monitor the integration by checking for errors in document uploads or access issues in the Power Platform Admin Center (e.g., under Analytics or Health).
 - Review user feedback to identify any issues (e.g., permission errors, missing documents).
 - Make adjustments as needed, such as updating SharePoint site URLs, modifying table permissions, or enabling document management for additional tables.
 - Ensure SharePoint storage limits and retention policies align with your organization's requirements.