Module [#]: Sharepoint Integration

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- Overview
- Requirements
- Sharepoint Setup
- Document Management Configuration
- Managing Documents
- Lab

Overview

Overview

- Provides Document Management capabilities
- Enabled by default
- Can utilize Dynamics CRM Look and Feel
- Can create document folder automatically
- Uses Sharepoint 2007, 2010 or Online

Requirements

Supported Configurations

- **Supported Sharepoint Versions**
  - All Sharepoint 2007 versions (iFrame only)
  - Sharepoint 2010 (iFrame or List Component)
  - Currently Sharepoint Online will be iFrame only. Update is in the works.
- **List Component for CRM**
  - Sharepoint 2010 only
  - Automatic folder creation
  - Microsoft Dynamics CRM Grid Look and Feel

Note: The CRM Outlook client does not offer document integration with Sharepoint, when the client is in Offline mode.

Sharepoint Setup

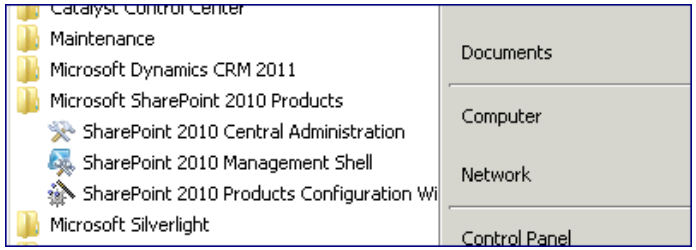
Installing List Component

- **Preparing Sharepoint**
  - Download CRM List Component
    - http://www.microsoft.com/downloads/en/details.aspx?FamilyID=23c0f351-8694-4d92-9ddf-34a949aec6a7&displayLang=en
  - Execute download to extract files
  - Run Powershell Script to enable “Microsoft SharePoint Foundation User Code Service”
  - Install and Activate the CRM List Component

Note: Detailed Steps for Installation can also be found in the readme.htm included in the download or this module’s Lab.

Installing List Component

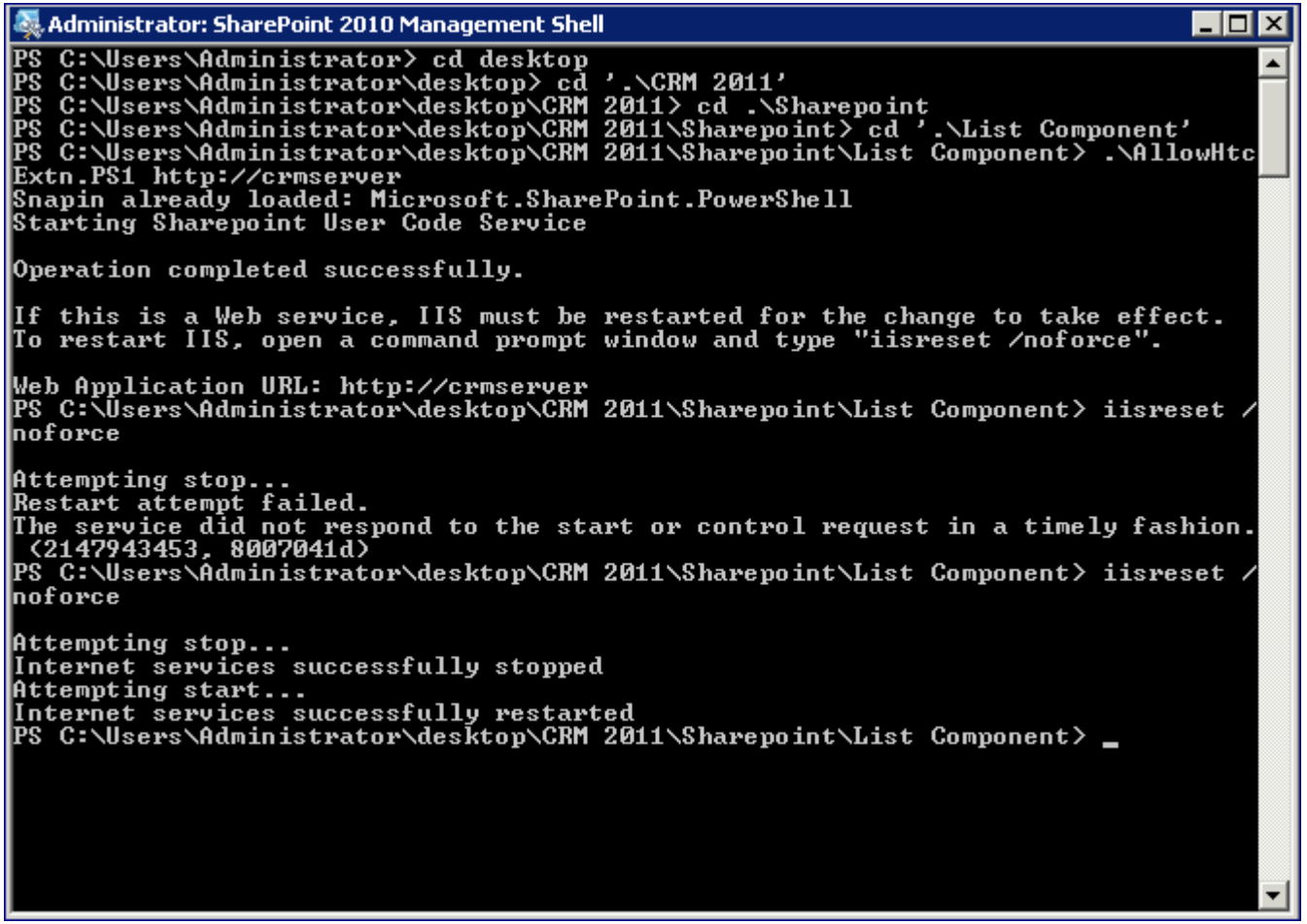
- **Running the PowerShell Script**
  - Open the SharePoint 2010 Management Shell



  - Copy the script to the SharePoint server and navigate to it with Management Shell
  - Run the following Command:

    .\AllowHtcExtn.ps1 *http://servername*

Installing List Component

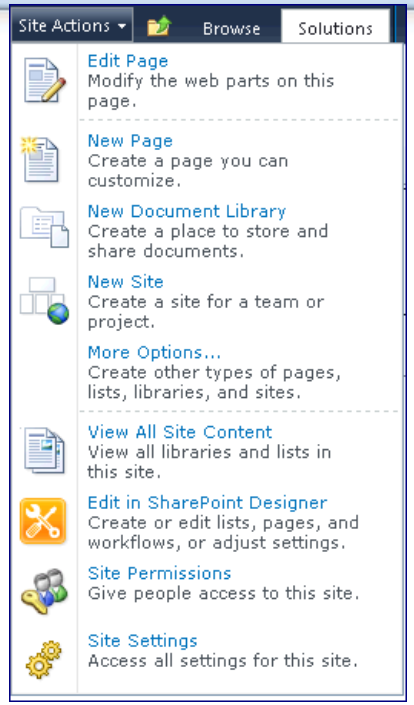


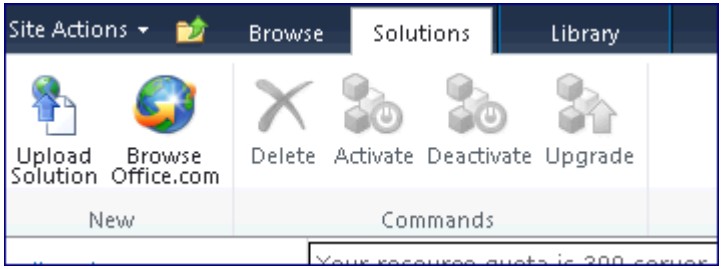
Installing List Component

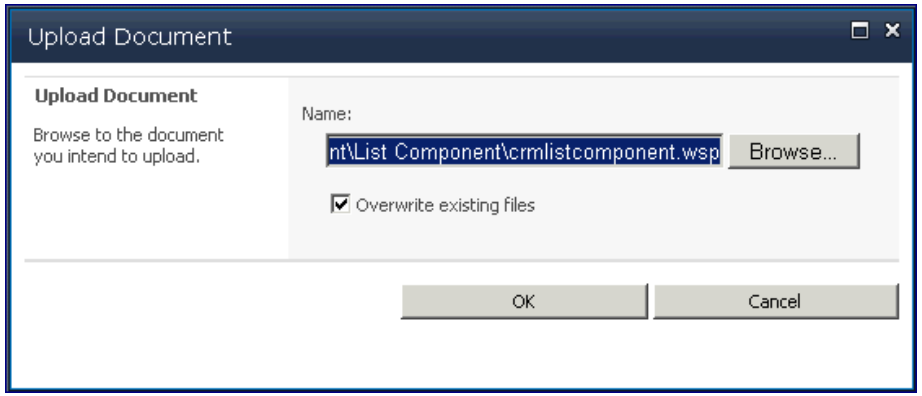
Install List Component

- Open your browser.
- In the address bar, type the URL of the site collection on which you want to install the Microsoft Dynamics CRM List component.
- Click **Site Actions**, and then click **Site Settings**.
- Under **Galleries**, click **Solutions**.
- On the **Solutions** tab, in the **New** group, click **Upload Solution**.
- Click **Browse**, locate the crmlistcomponent.wsp file, and then click **OK**.
- On the **Solutions** tab, in the **Commands** group, click **Activate**.

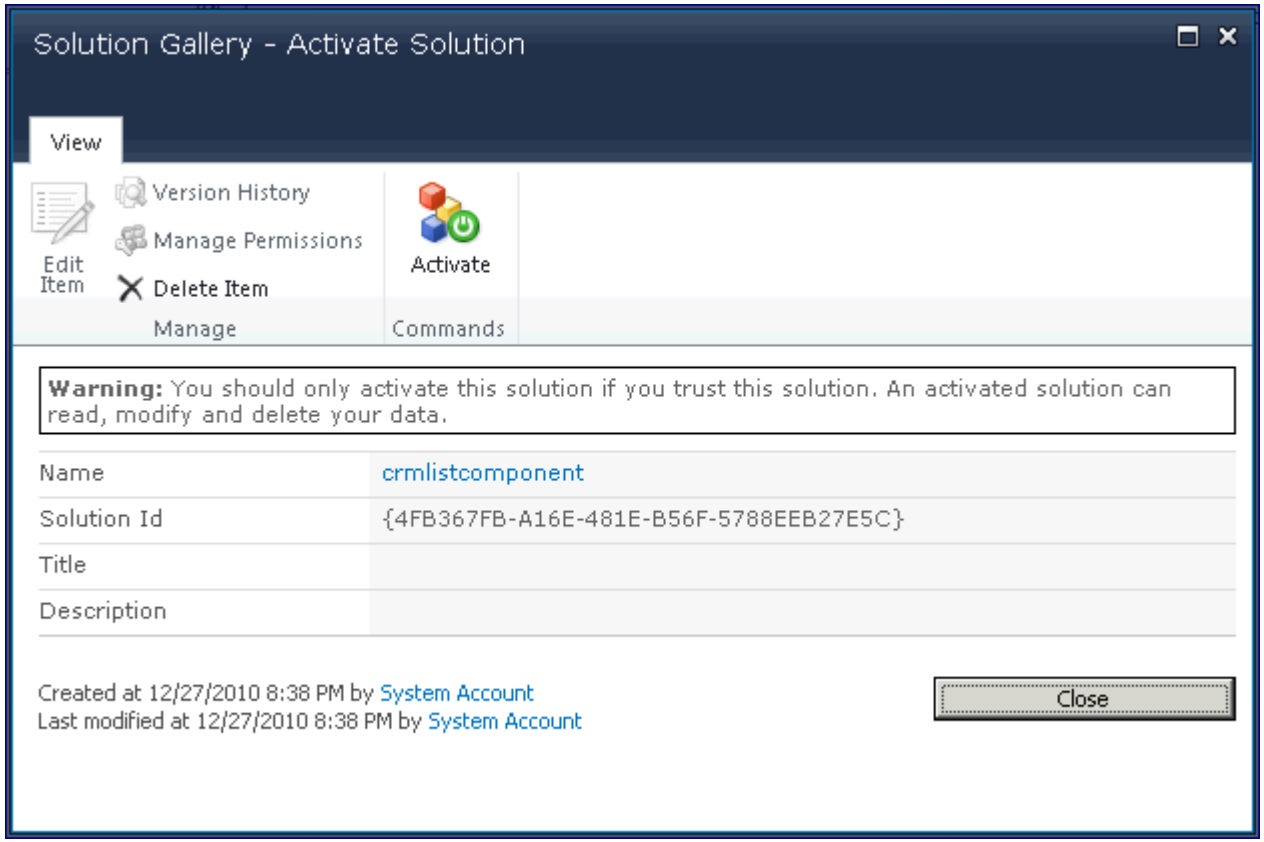
Installing List Component







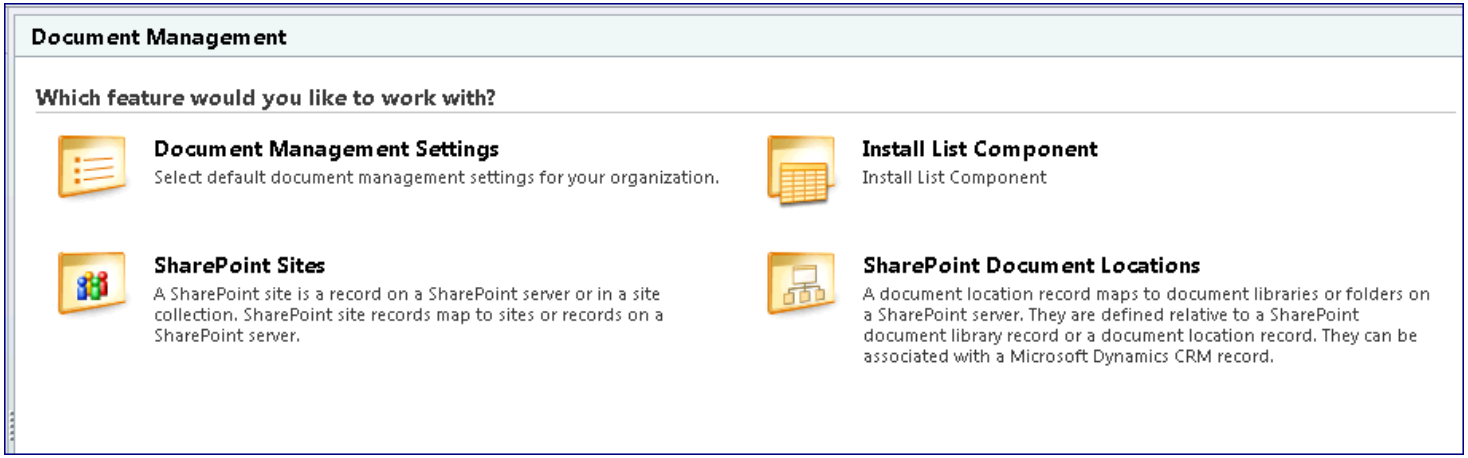
Installing List Component



Document Management Configuration

Getting Started

- **Areas in the Document Management Settings**
  - Document Management Settings
  - SharePoint Sites
  - Install List Component
  - SharePoint Document Locations

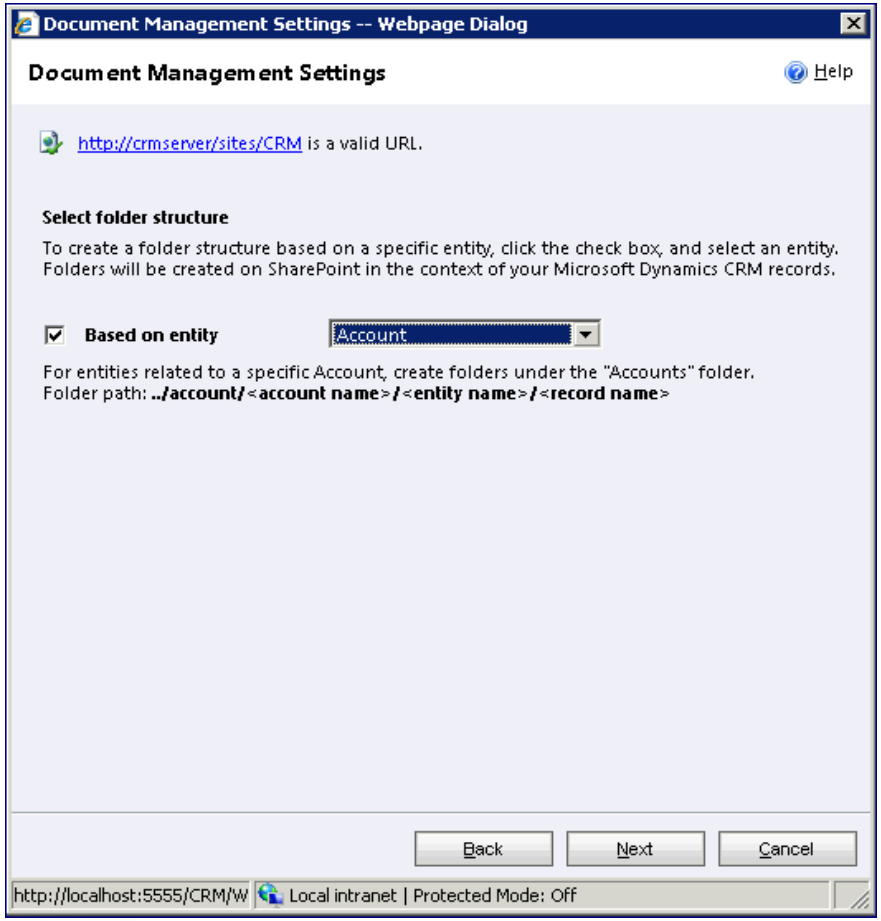


Document Management Settings

- Can be enabled for those entities that can be customized
- Entities enabled by default
  - Account
  - KbArticle
  - Lead
  - Opportunity
  - Product
  - Quote
  - Sales Literature
- Folders automatically created if the site has the List component installed

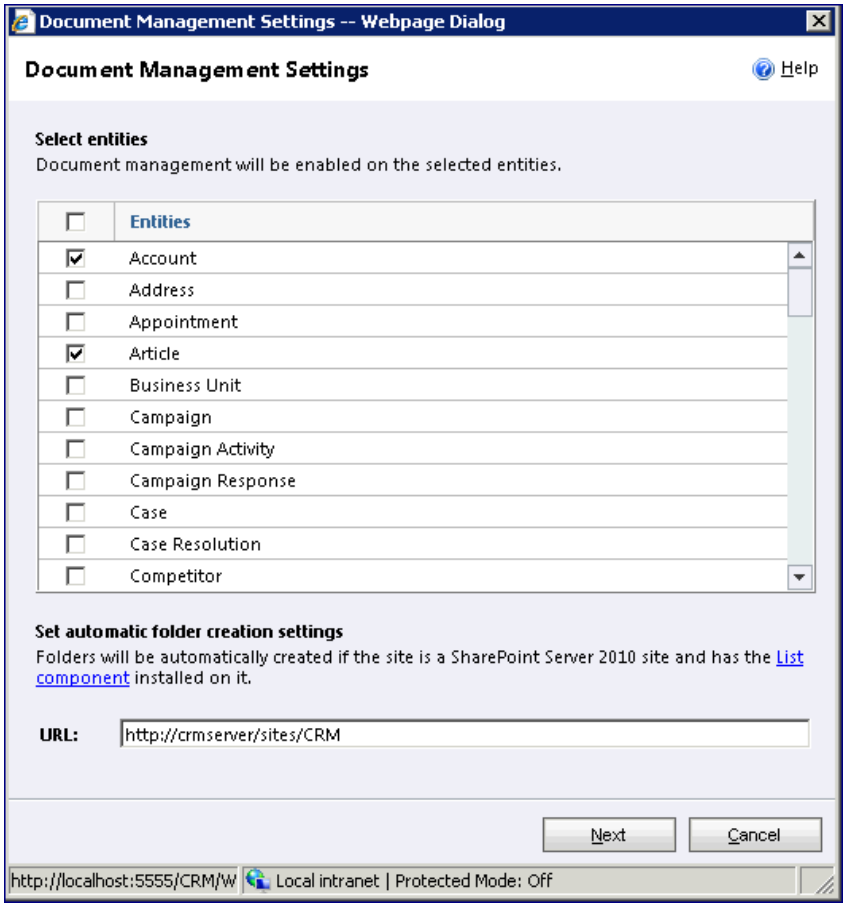
Document Management Settings

- Select folder structure



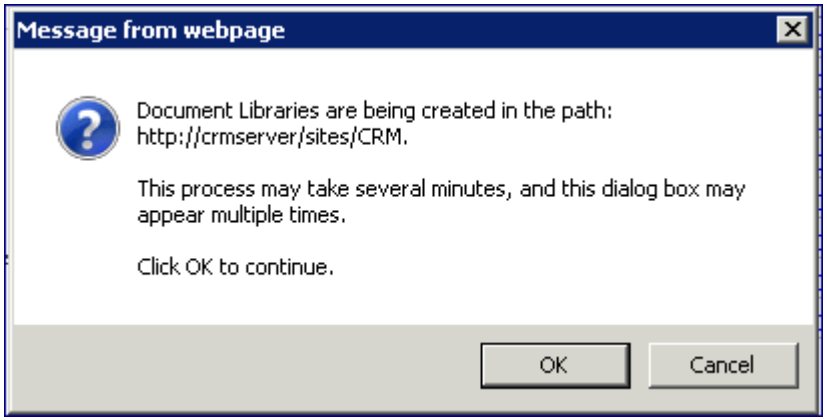
Document Management Settings

- Select Entities

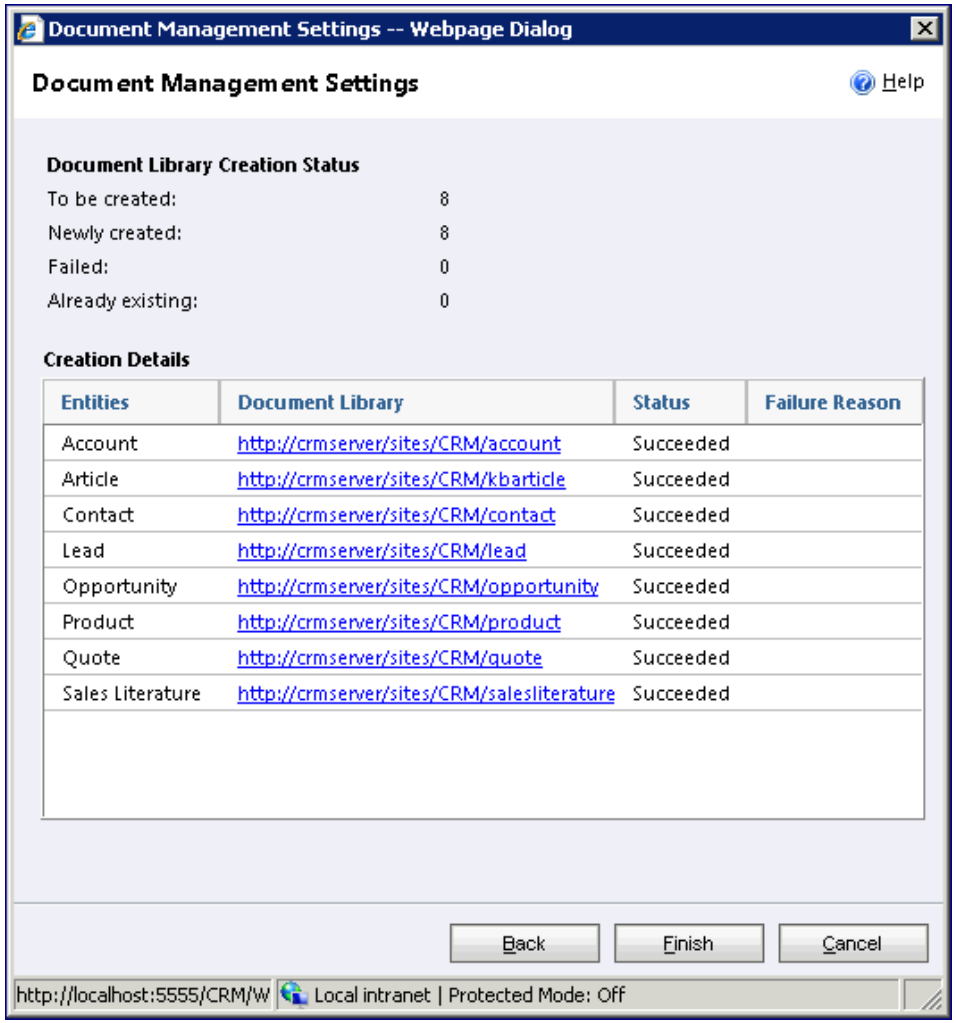


Document Management Settings

- May receive the following message while the Library Creation process runs



Document Management Settings

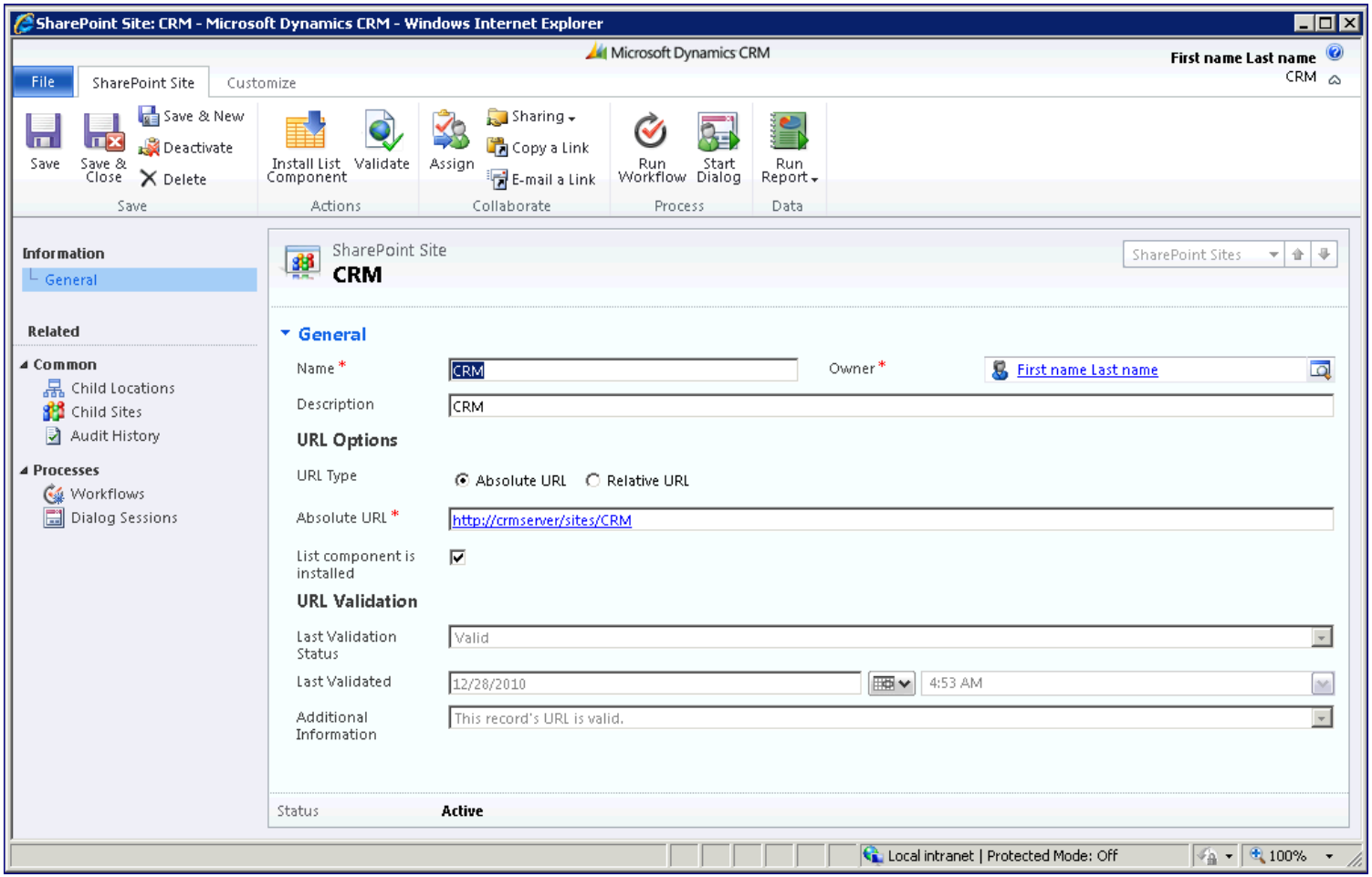


SharePoint Sites

- Sites in Microsoft Dynamics CRM are records that point to a site or site collection on SharePoint. Sites and site collections in SharePoint contain document libraries and folders that are used to store documents for Microsoft Dynamics CRM records.

    - **Absolute URL**. Specify the full URL of an existing site collection or site on SharePoint.
    - **Relative URL**. Only use this option when you have at least one site record pointing to a site collection in SharePoint. Use relative URLs if the sites or subordinate sites that you want are relative to an existing site record. Relative URLs can make the site maintenance easier.
    - **List component is installed**. Click this check box if you have specified the URL of a site collection on SharePoint Server 2010 and if you have installed the Microsoft Dynamics CRM List component on the specified parent site collection. This check box is available only if you used the **Absolute URL** option.

SharePoint Sites



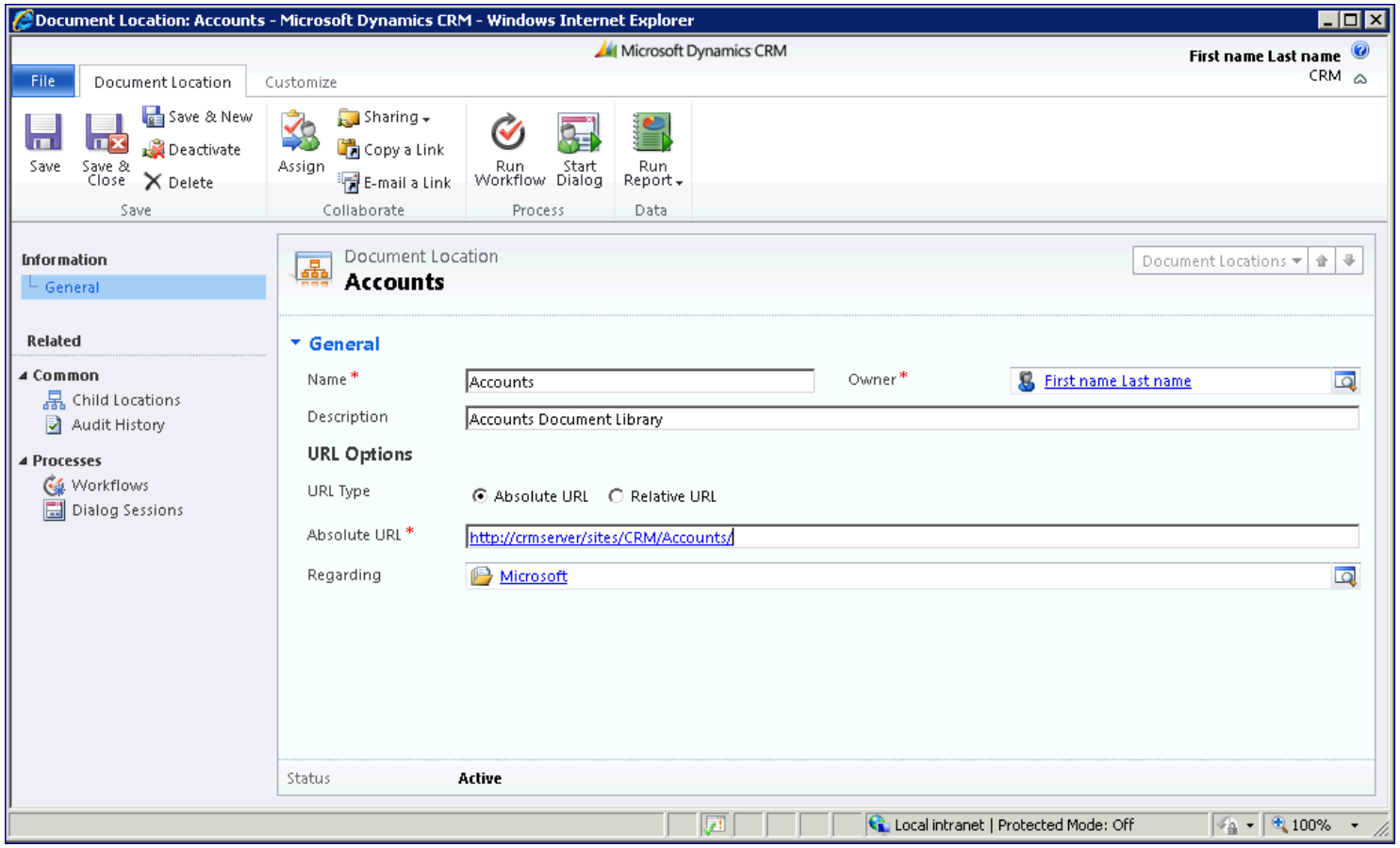
Install List Component

- When clicking the **Install List component** option in the **Document Management** area, you will be brought to a Microsoft site that contains a download with four files:

SharePoint Document Locations

- Specify a Document Location for CRM Records
- Maps to Document Library or Folder

SharePoint Document Locations

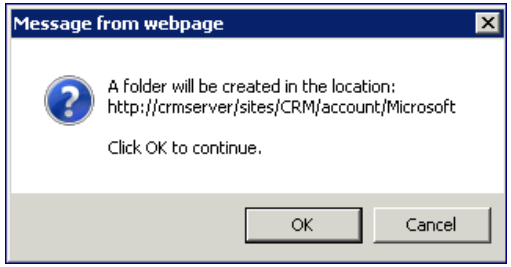


Managing Documents

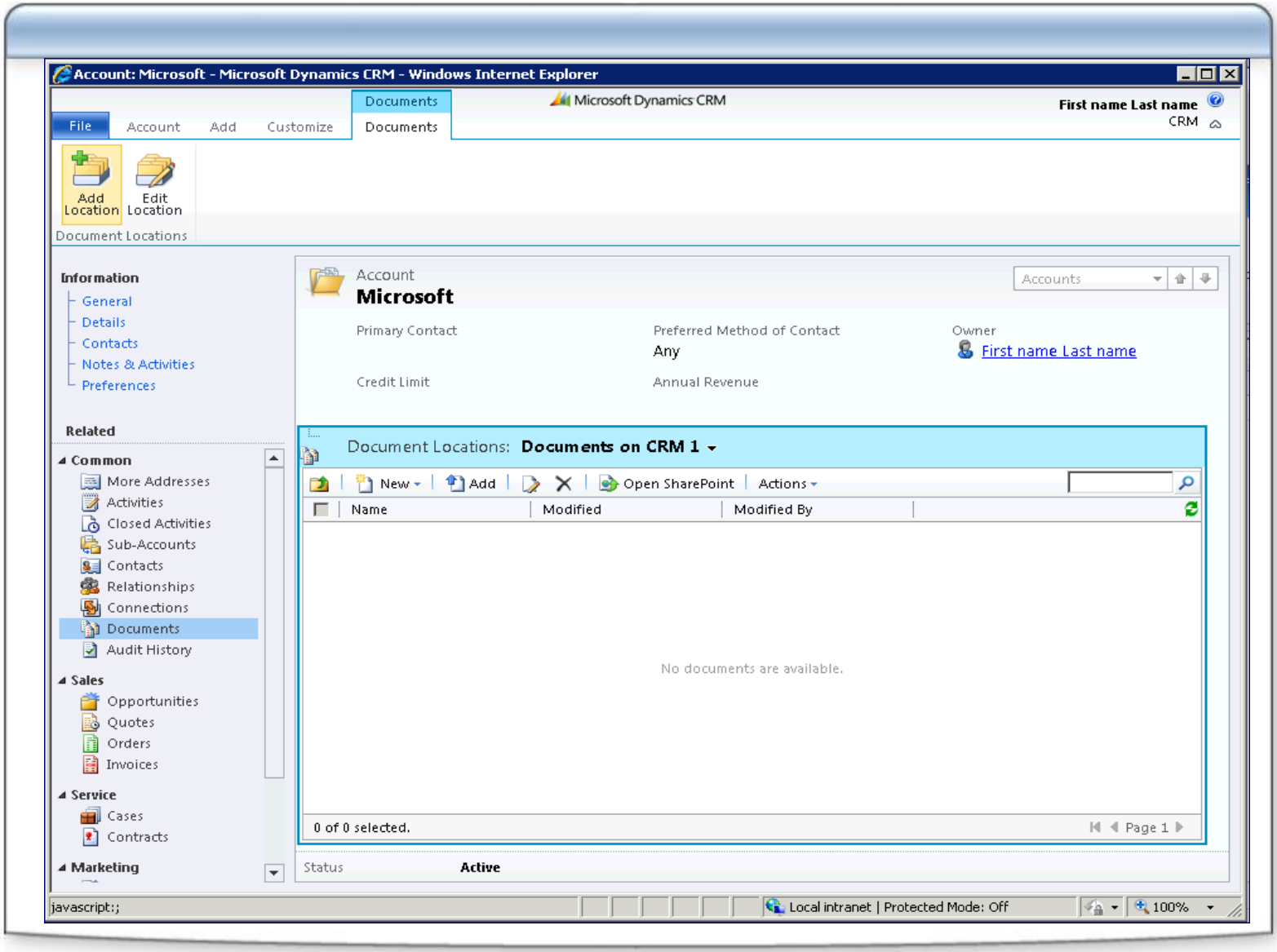
Adding a Document Location to a Record

- Open a record for one of the Entities that you enabled Document Management for
- Select Documents on the Left Menu Navigation

- Receive message about folder creation (If List Component is installed)

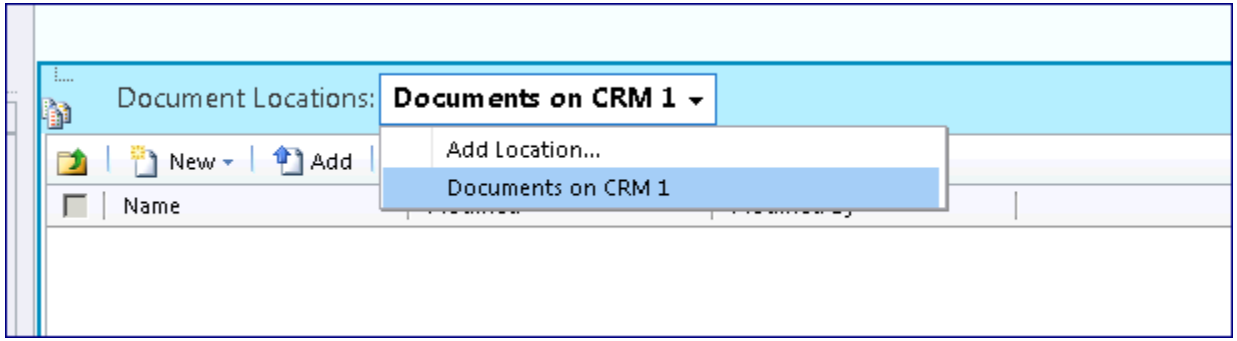


Adding a Document Location to a Record



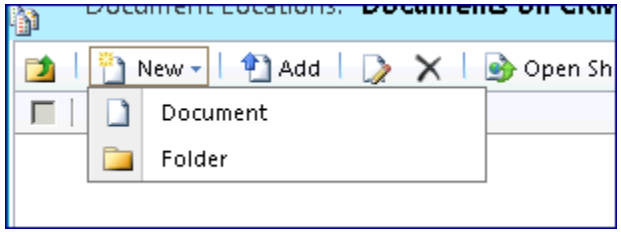
Add or Edit a Document Location

- Note the drop-down option for “Document Locations” The drop-down will show all SharePoint locations associated with the record. This helps the user quickly look at multiple SharePoint locations for the specific record.

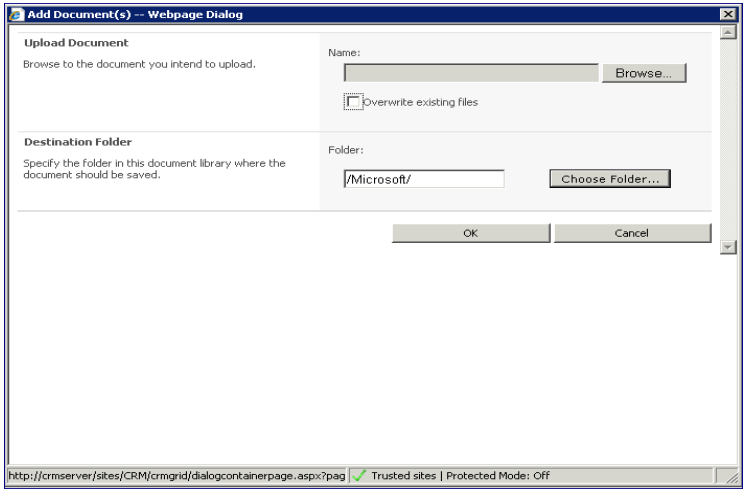


Managing Documents

- Create New Documents or Folders



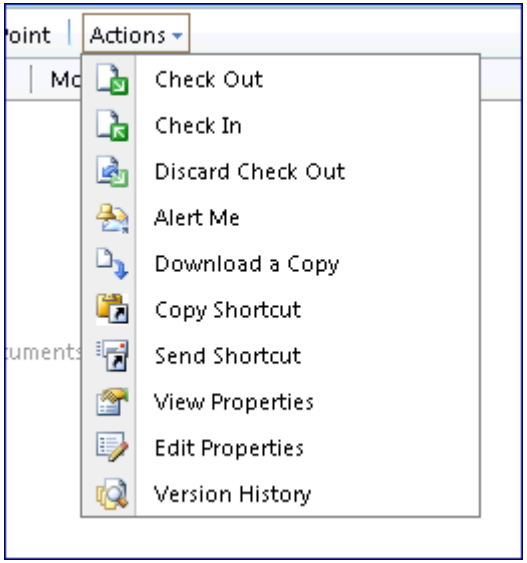
- Add a Document



Managing Documents

- Edit an existing document

- Perform specific SharePoint actions



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