

SharePoint Integration

STRATEGY ■ CONSULTING ■ SUPPORT



SharePoint Integration

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

Overview

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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

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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

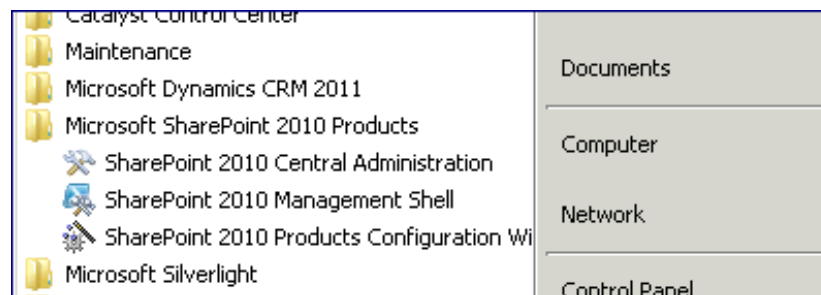
STRATEGY ■ CONSULTING ■ **SUPPORT**

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

```

Administrator: SharePoint 2010 Management Shell
PS C:\Users\Administrator> cd desktop
PS C:\Users\Administrator\desktop> cd '..\CRM 2011\'
PS C:\Users\Administrator\desktop\CRM 2011> cd .\Sharepoint
PS C:\Users\Administrator\desktop\CRM 2011\Sharepoint> cd '..\List Component\'
PS C:\Users\Administrator\desktop\CRM 2011\Sharepoint\List Component> .\AllowHtc
Extn.PS1 http://crmserver
Snapin already loaded: Microsoft.SharePoint.PowerShell
Starting Sharepoint User Code Service

Operation completed successfully.

If this is a Web service, IIS must be restarted for the change to take effect.
To restart IIS, open a command prompt window and type "iisreset /noforce".

Web Application URL: http://crmserver
PS C:\Users\Administrator\desktop\CRM 2011\Sharepoint\List Component> iisreset /
noforce

Attempting stop...
Restart attempt failed.
The service did not respond to the start or control request in a timely fashion.
(2147943453, 8007041d)
PS C:\Users\Administrator\desktop\CRM 2011\Sharepoint\List Component> iisreset /
noforce

Attempting stop...
Internet services successfully stopped
Attempting start...
Internet services successfully restarted
PS C:\Users\Administrator\desktop\CRM 2011\Sharepoint\List Component> _

```

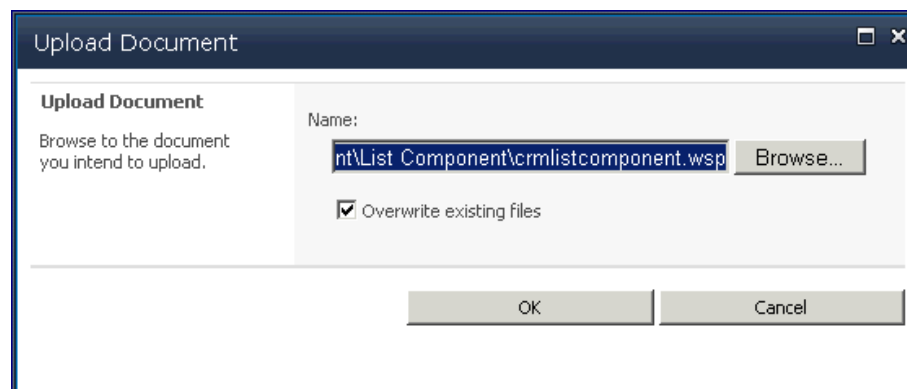
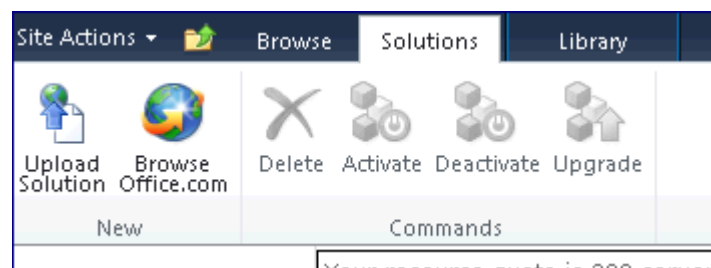
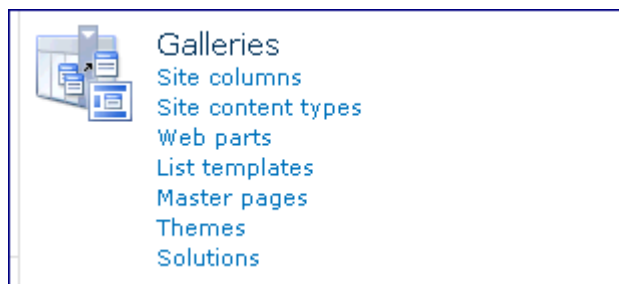
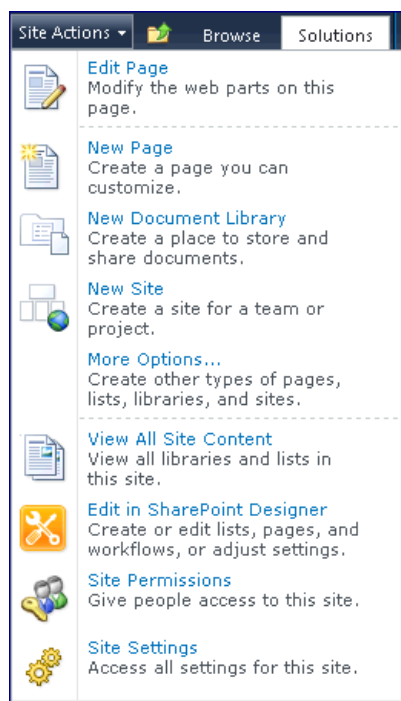
Installing List Component

● Install List Component

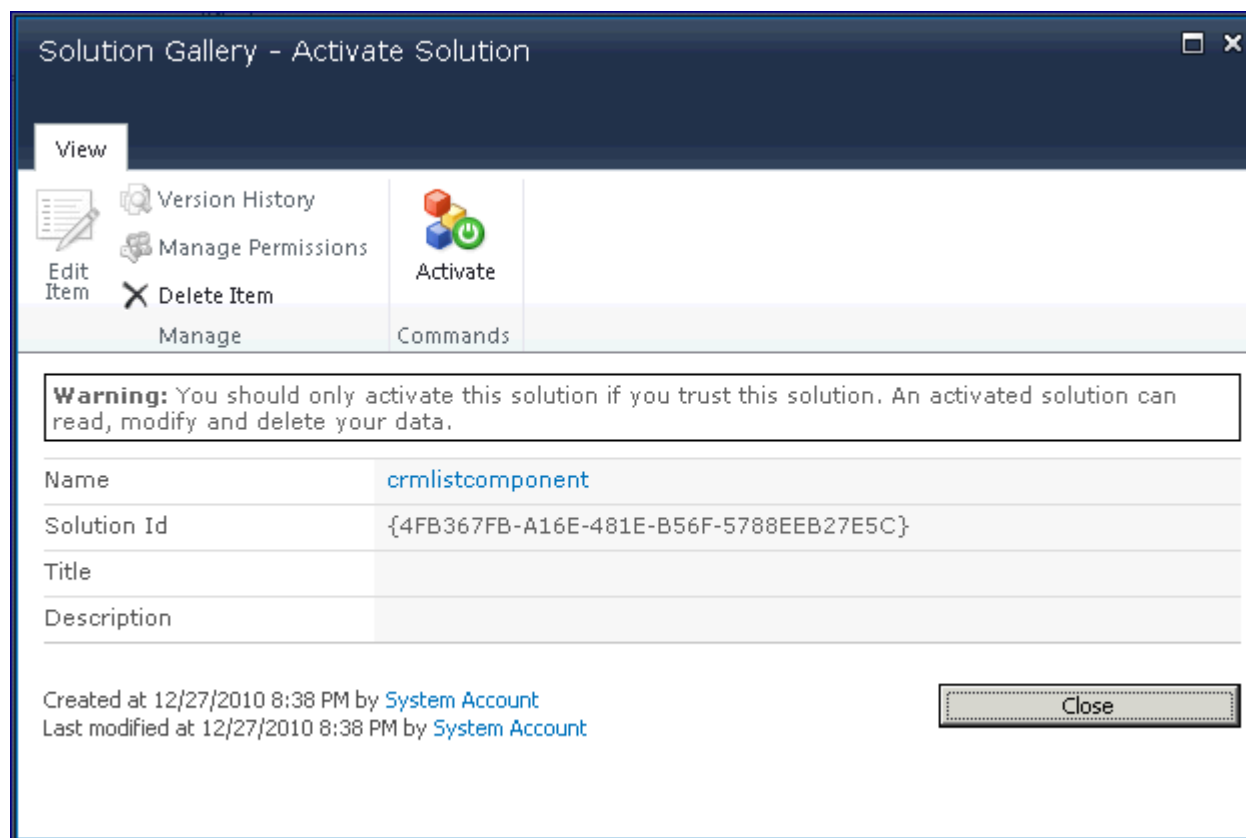
Open your browser.

- 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



<input type="checkbox"/> Name	Edit	Modified
crmlistcomponent		12/27/2010 8:38 PM

A green chess king piece stands prominently on the left, with a row of white chess pawns receding into the background. The pieces are on a reflective surface, and the background is a soft, out-of-focus light green.


Document Management Configuration


Getting Started


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


Document Management

Which feature would you like to work with?

**Document Management Settings**
Select default document management settings for your organization.

**Install List Component**
Install List Component

**SharePoint Sites**
A SharePoint site is a record on a SharePoint server or in a site collection. SharePoint site records map to sites or records on a SharePoint server.

**SharePoint Document Locations**
A document location record maps to document libraries or folders on a SharePoint server. They are defined relative to a SharePoint document library record or a document location record. They can be associated with a Microsoft Dynamics CRM record.

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 -- Webpage Dialog

Document Management Settings [Help](#)

<http://crmserver/sites/CRM> is a valid URL.

Select folder structure
To create a folder structure based on a specific entity, click the check box, and select an entity. Folders will be created on SharePoint in the context of your Microsoft Dynamics CRM records.

☒ **Based on entity** Account

For entities related to a specific Account, create folders under the "Accounts" folder.
Folder path: `../account/<account name>/<entity name>/<record name>`

[Back](#) [Next](#) [Cancel](#)

<http://localhost:5555/CRM/W> Local intranet | Protected Mode: Off

Document Management Settings

- Select Entities

Document Management Settings -- Webpage Dialog

Document Management Settings [Help](#)

Select entities
Document management will be enabled on the selected entities.

<input type="checkbox"/>	Entities
<input checked="" type="checkbox"/>	Account
<input type="checkbox"/>	Address
<input type="checkbox"/>	Appointment
<input checked="" type="checkbox"/>	Article
<input type="checkbox"/>	Business Unit
<input type="checkbox"/>	Campaign
<input type="checkbox"/>	Campaign Activity
<input type="checkbox"/>	Campaign Response
<input type="checkbox"/>	Case
<input type="checkbox"/>	Case Resolution
<input type="checkbox"/>	Competitor

Set automatic folder creation settings
Folders will be automatically created if the site is a SharePoint Server 2010 site and has the [List component](#) installed on it.

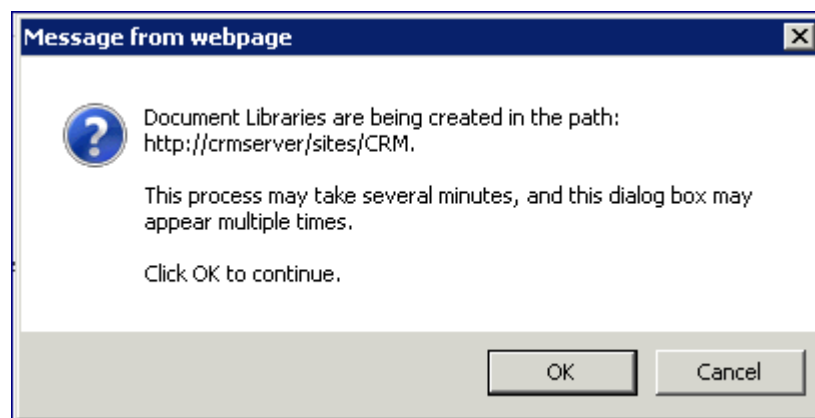
URL:

[Next](#) [Cancel](#)

http://localhost:5555/CRM/w Local intranet | Protected Mode: Off

Document Management Settings

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



Document Management Settings

Document Management Settings -- Webpage Dialog

Document Management Settings [Help](#)

Document Library Creation Status

To be created:	8
Newly created:	8
Failed:	0
Already existing:	0

Creation Details

Entities	Document Library	Status	Failure Reason
Account	http://crmserver/sites/CRM/account	Succeeded	
Article	http://crmserver/sites/CRM/kbarticle	Succeeded	
Contact	http://crmserver/sites/CRM/contact	Succeeded	
Lead	http://crmserver/sites/CRM/lead	Succeeded	
Opportunity	http://crmserver/sites/CRM/opportunity	Succeeded	
Product	http://crmserver/sites/CRM/product	Succeeded	
Quote	http://crmserver/sites/CRM/quote	Succeeded	
Sales Literature	http://crmserver/sites/CRM/salesliterature	Succeeded	

Back Finish Cancel

http://localhost:5555/CRM/W Local intranet | Protected Mode: Off

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

SharePoint Site: CRM - Microsoft Dynamics CRM - Windows Internet Explorer

Microsoft Dynamics CRM

First name Last name
CRM

File SharePoint Site Customize

Save Save & Close Save & New
Delete

Install List Component Validate Assign Copy a Link E-mail a Link
Share Run Workflow Start Dialog Run Report

Save Actions Collaborate Process Data

Information
General

Related

Common
Child Locations
Child Sites
Audit History

Processes
Workflows
Dialog Sessions

SharePoint Site
CRM

SharePoint Sites

General

Name * CRM Owner * First name Last name

Description CRM

URL Options

URL Type ☒ Absolute URL ☐ Relative URL

Absolute URL * <http://www.example.com/CRM>

List component is installed ☒

URL Validation

Last Validation Status Valid

Last Validated 12/26/2009 4:53 AM

Additional Information This record's URL is valid.

Status Active

Local intranet | Protected Mode: Off 100%

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

Document Location: Accounts - Microsoft Dynamics CRM - Windows Internet Explorer

Microsoft Dynamics CRM

First name Last name
CRM

File Document Location Customize

Save Save & Close Save & New Deactivate Assign Sharing Copy a Link E-mail a Link Run Workflow Start Dialog Run Report

Save Collaborate Process Data

Information
General

Related

Common
Child Locations
Audit History

Processes
Workflows
Dialog Sessions

Document Location
Accounts

Document Locations

General

Name Accounts Owner First name Last name

Description Accounts Document Library

URL Options

URL Type ☒ Absolute URL ☐ Relative URL

Absolute URL <http://mymcrmsite/CRM/Accounts/>

Regarding [Microsoft](#)

Status Active

Local intranet | Protected Mode: Off 100%



Managing Documents

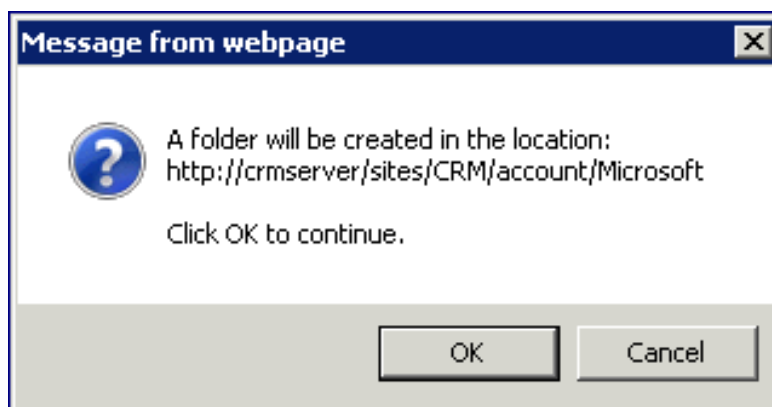


Adding a Document Location to a Record

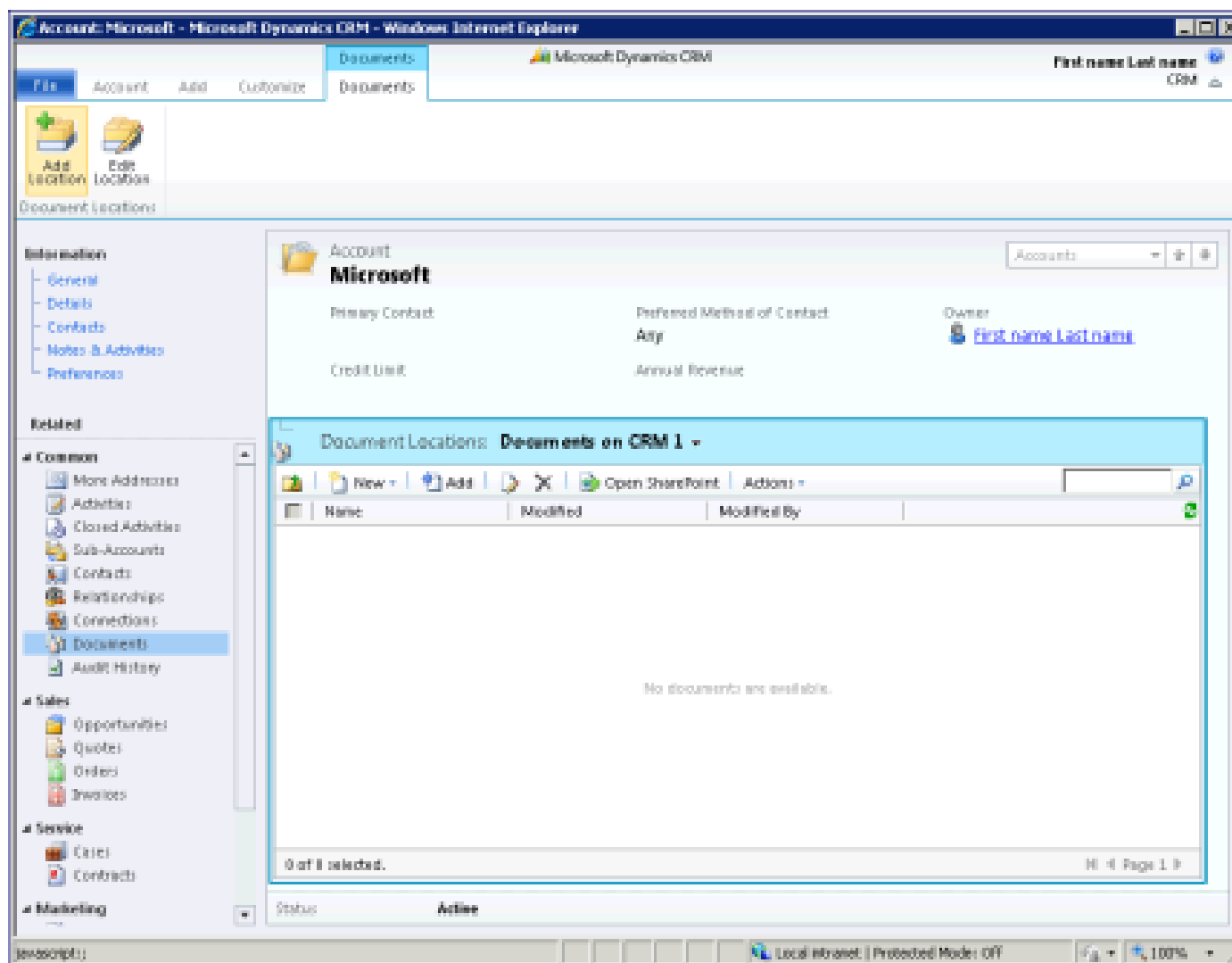
- Open a record for one of the Entities that you enabled Document Management for
- Select Documents on the Left Menu Navigation



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

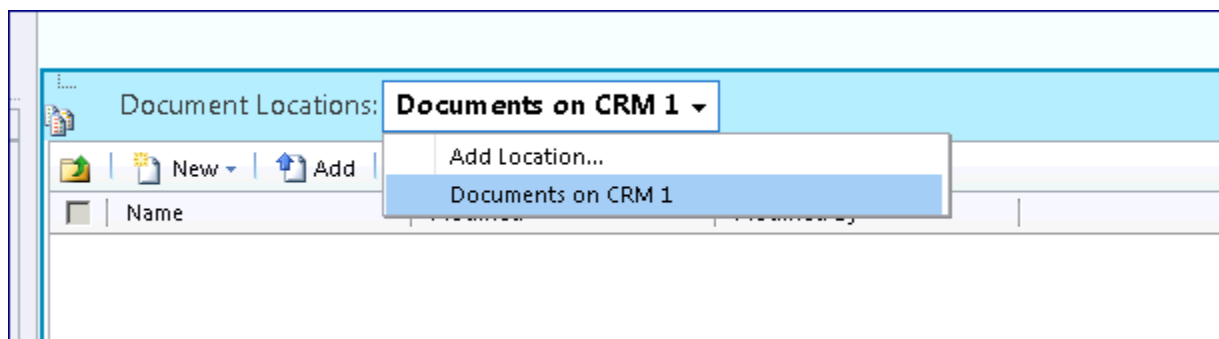


Adding a Document Location to a Record



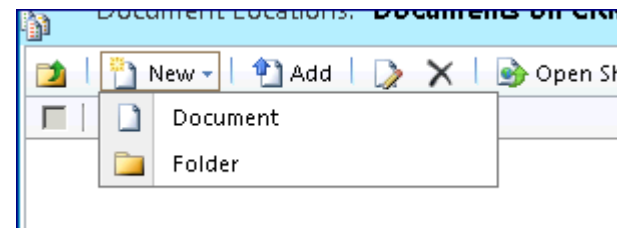
Add or Edit a Document Location

- 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.

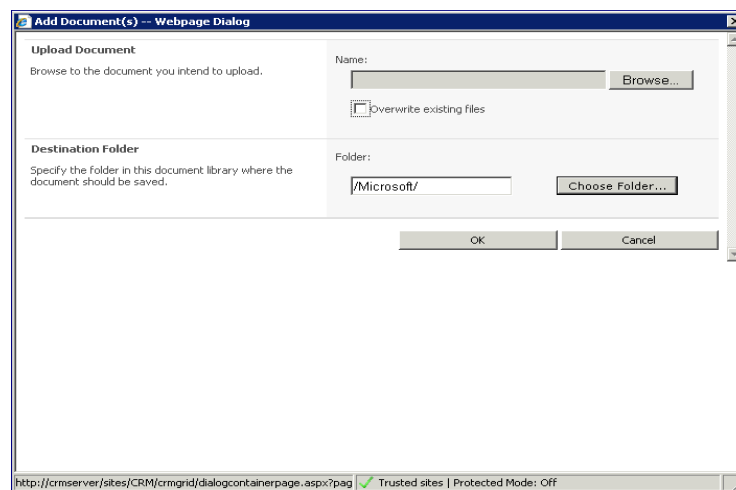


Managing Documents

- Create New Documents or Folders



- Add a Document

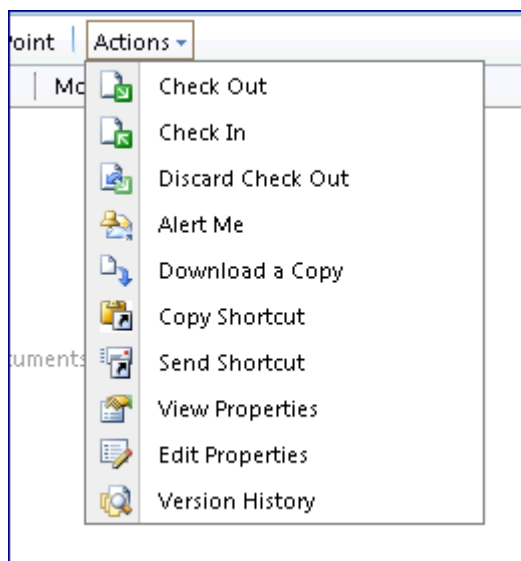


Managing Documents

- Edit an existing document



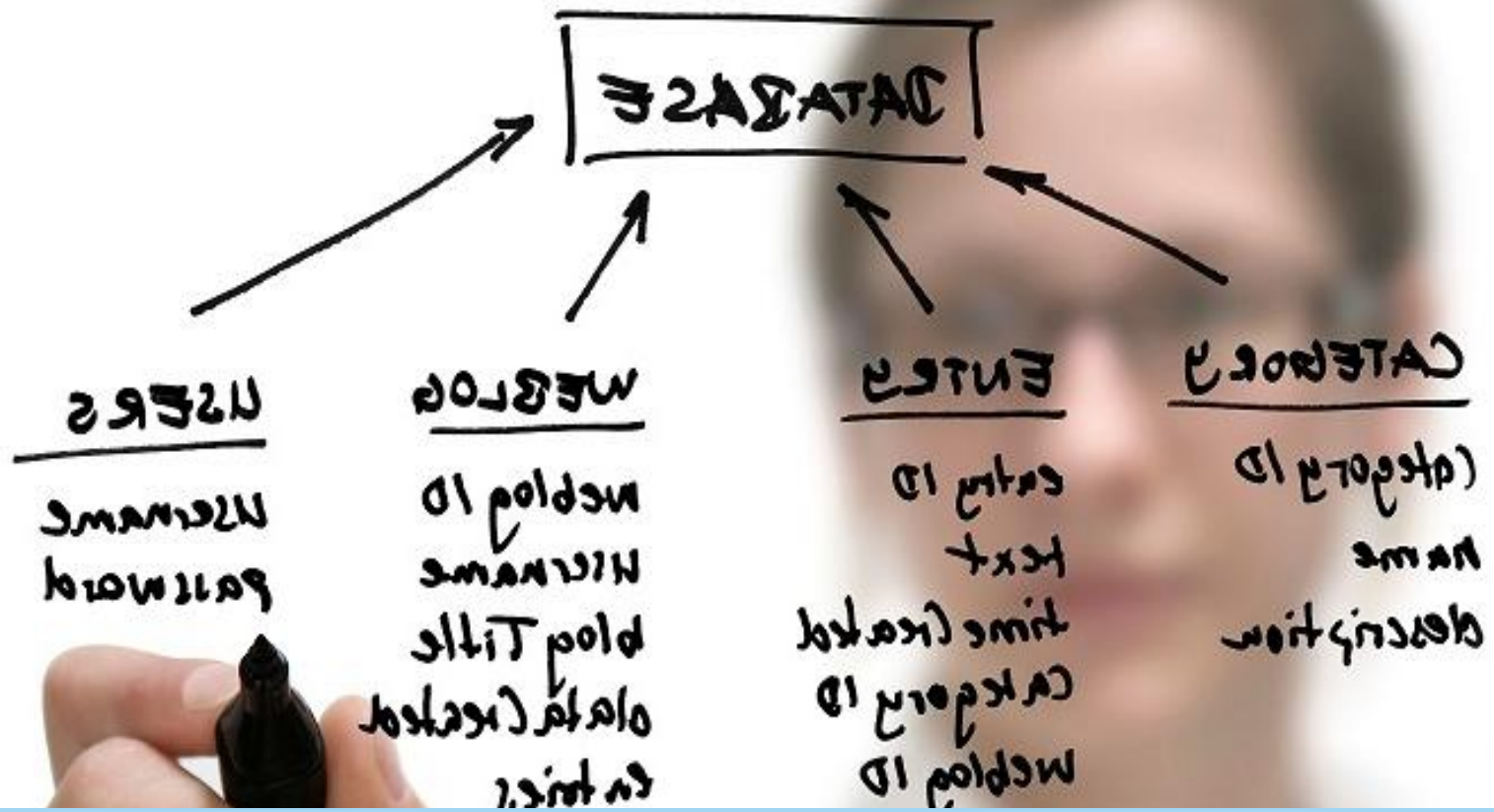
- Perform specific SharePoint actions



Summary

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





Questions?