Integrating Microsoft Dynamics 365 On-premise to SharePoint Online
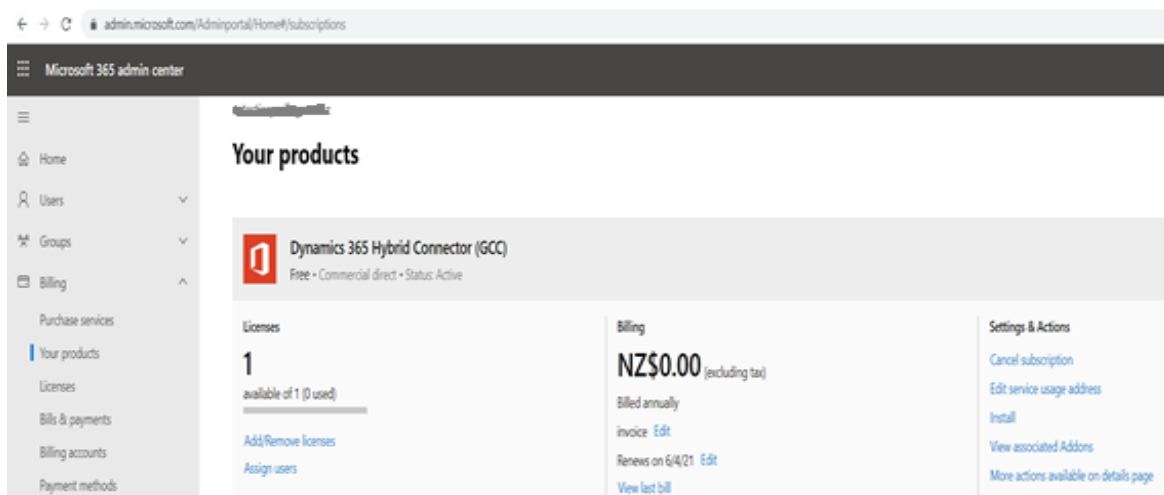
Step-1: Back up Database
Step-2: Permissions Required:

1. *Be part of the Administrator Group on the Windows and in D365 Server*
2. *local Administrators group membership on D365 Server*
3. *Office 365 Global Administrators Membership to run the Microsoft AzurePowerShell cmdlets*

Step-3: Prerequisites:

1. *Configure IFD for Microsoft Dynamics 365 (https://docs.microsoft.com/en-us/previous-versions/dynamicscrm-2016/deployment-administrators-guide/dn609803(v=crm.8)?redirectedfrom=MSDN)- Not Required*
2. *Claims-based Authentication for Dynamics 365 (https://www.microsoft.com/en-us/download/details.aspx?id=41701)*
3. *Microsoft Dynamics 365 Hybrid Connector (https://admin.microsoft.com/Adminportal/Home#/subscriptions)*

4. *Install 509 Digital Certificate issued by trusted certificate OR Self-signed certificate if using the server-based authentication*

5. *Certificate "devrito2016" is downloaded and installed by the IT Help in the IIS Manager (https://www.ssls.com/knowledgebase/how-to-install-an-ssl-certificate-on-iis8/)*

6. *Bindings for the certificate (443) is created under the Microsoft Dynamics CRM:*
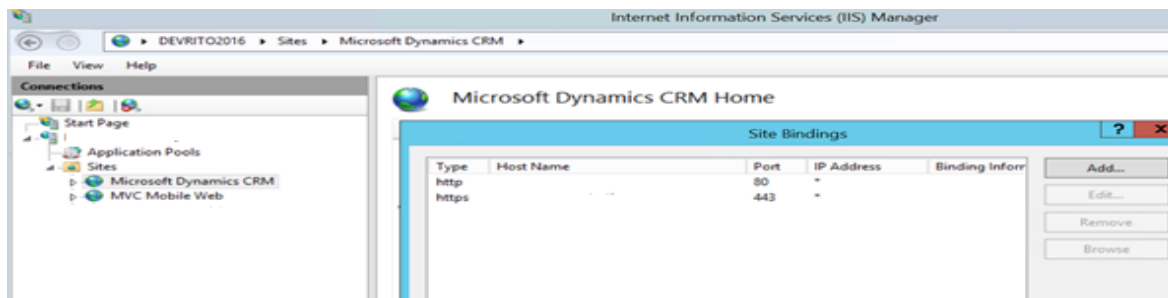
7. Make sure the user and RITO Service Account executing should be associated to Certificate in the MMC and should have permissions:
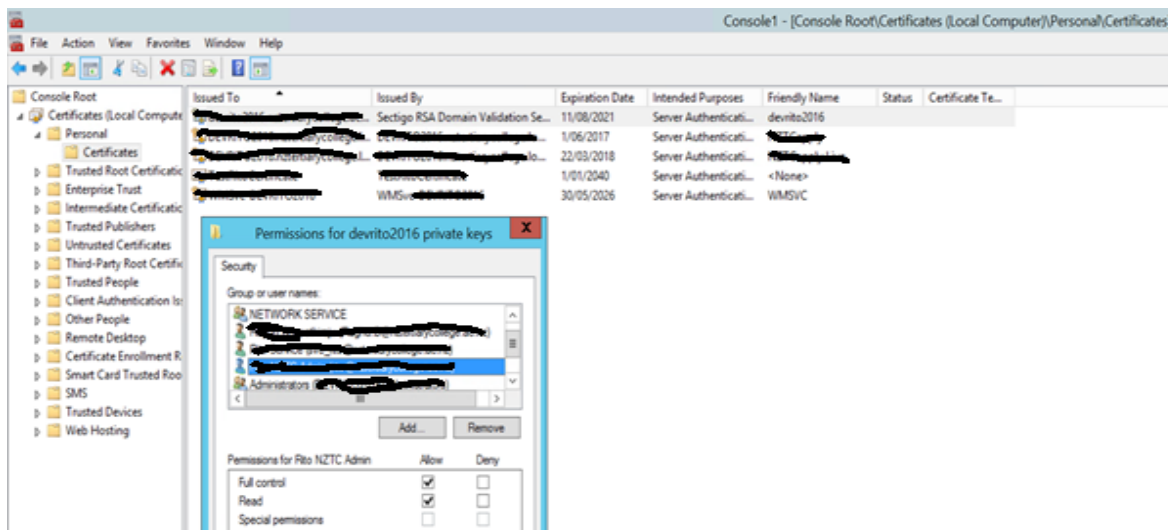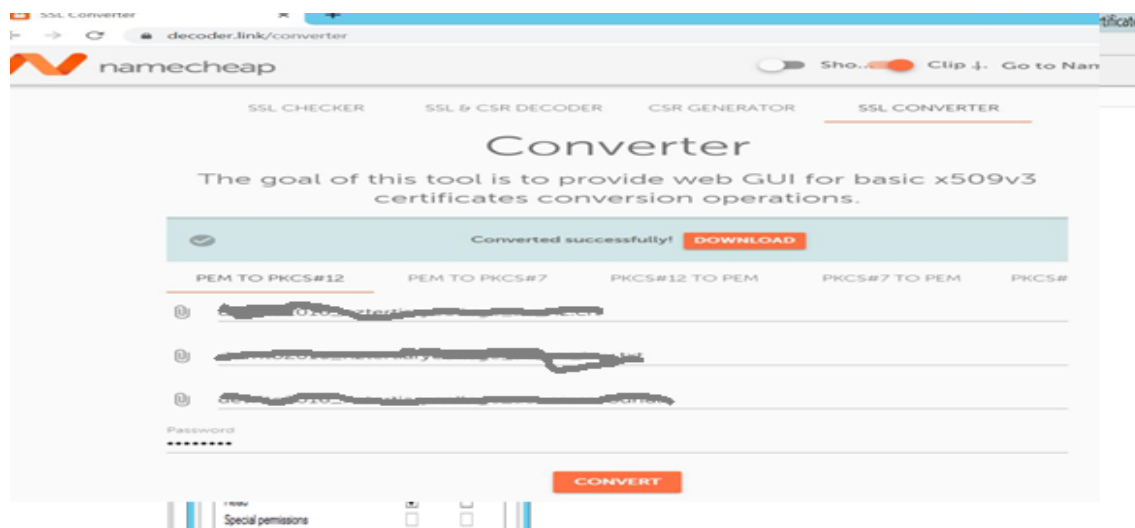

8. In order to get the .pfx file, you need to use this tool:
https://decoder.link/converter
Please upload the .crt, .ca-bundle and the private key in .key format there. Also, please set up a password, as the .pfx will be corrupted without it.
You can stay on "PEM TO PKCS#12" tab. ".crt" goes to "Certificate File"; ".key" to "Key File"; '.ca-bundle' to "Bundle File".

Step-4: The following software features are required to run the Windows PowerShell cmdlets described in this topic

Microsoft Online Services Sign-In Assistant for IT Professionals Beta
Azure Active Directory Module for Windows PowerShell (64-bit version)

Step-5: Now as the certificate is valid and converted to the ".pfx" run the following command in the Powershell (as an admin):

CertificateScriptWithCommand = ".\CertificateReconfiguration.ps1 -certificateFile C:\Users\sysadmin\Downloads\SSLS\devrito2016.pfx -password nztc1234 -updateCrm -certificateType S2STokenIssuer
-serviceAccount NZTCOLLEGE\rito_wf -storeFindType FindBySubjectDistinguishedName"
Invoke-Expression -command $CertificateScriptWithCommand

Step-6: To install the latest version MSOnline, Please execute the below command in the PowerShell

Install-Module -Name MSOnlineExt -RequiredVersion 1.0.35

Step-7: Prepare the PowerShell session (execute this command in PowerShell 7 rather than in the PowerShell 5).

The following cmdlets enable the computer to receive remote commands and add Office 365 modules to the PowerShell session:

```
Enable-PSRemoting -force
New-PSSession
Import-Module MSOnline -force
Import-Module MSOnlineExt -force
```

```
PS C:\Program Files\Microsoft Dynamics CRM\tools> Import-Module MSOnline -force
PS C:\Program Files\Microsoft Dynamics CRM\tools> Import-Module MSOnlineExt -force
WARNING: Please consider enabling telemetry to help us improve MSOnlineExt!

Join with the following command:

Set-MSOnlineExtTelemetryOption -Participate $true

To disable this warning and set your preference, use the following command and then reload the module:
Set-MSOnlineExtTelemetryOption -Participate $true or $false
```

Step-8: Connect to Office 365.

When you run the Connect-MsolService command, you must provide a valid Microsoft account that has Office 365 Global Administrator membership for the SharePoint Online license that is required.

```
$msolcred = get-credential
connect-msolservice -credential $msolcred
```

```
PS C:\Program Files\Microsoft Dynamics CRM\tools> $msolcred = get-credential

cmdlet Get-Credential at command pipeline position 1
Supply values for the following parameters:
Credential
PS C:\Program Files\Microsoft Dynamics CRM\tools> connect-msolservice -credential $msolcred
PS C:\Program Files\Microsoft Dynamics CRM\tools>
```

Step-9: Set the certificate.

```
$Certificate = New-Object
System.Security.Cryptography.X509Certificates.X509Certificate2
("C:\ITSupport\Certificate_folder\CertificateName.crt")
$CERCertificateBin = $Certificate.GetRawCertData()
$CredentialValue = [System.Convert]::ToBase64String($CERCertificateBin)
```

Step-10: Set the Azure Active Directory Service Principal Name (SPN) in SharePoint.

```
$RootDomain = "*.contoso.com"
$CRMAppId = "00000007-0000-0000-c000-000000000000"
New-MsolServicePrincipalCredential -AppPrincipalId $CRMAppId -Type asymmetric -
Usage Verify -Value $CredentialValue
$CRM = Get-MsolServicePrincipal -AppPrincipalId $CRMAppId
$ServicePrincipalName = $CRM.ServicePrincipalNames
$ServicePrincipalName.Remove("$CRMAppId/$RootDomain")
```

```
$ServicePrincipalName.Add("$CRMAppId/$RootDomain")
Set-MsolServicePrincipal -AppPrincipalId $CRMAppId -ServicePrincipalNames
$ServicePrincipalName
```

```
C:\Program Files\Microsoft Dynamics CRM\Tools> $RootDomain = "
C:\Program Files\Microsoft Dynamics CRM\Tools> $CRMAppId = "00000007-0000-0000-c000-000000000000"
C:\Program Files\Microsoft Dynamics CRM\Tools> New-MsolServicePrincipalCredential -AppPrincipalId $CRMAppId -Type asymmetric -Usage Verify -Value $CredentialVal
C:\Program Files\Microsoft Dynamics CRM\Tools> $CRM = Get-MsolServicePrincipal -AppPrincipalId $CRMAppId
C:\Program Files\Microsoft Dynamics CRM\Tools> $ServicePrincipalName = $CRM.ServicePrincipalNames
C:\Program Files\Microsoft Dynamics CRM\Tools> $ServicePrincipalName.Remove("$CRMAppId/$RootDomain")
ue
C:\Program Files\Microsoft Dynamics CRM\Tools> $ServicePrincipalName.Add("$CRMAppId/$RootDomain")
C:\Program Files\Microsoft Dynamics CRM\Tools> Set-MsolServicePrincipal -AppPrincipalId $CRMAppId -ServicePrincipalNames $ServicePrincipalName
C:\Program Files\Microsoft Dynamics CRM\Tools>
```

Step-11: Configure the Microsoft Dynamics 365 Server for server-based authentication with SharePoint.

```
Add-PSSnapin Microsoft.Crm.PowerShell
$setting = New-Object "Microsoft.Xrm.Sdk.Deployment.ConfigurationEntity"
$setting.LogicalName = "ServerSettings"
$setting.Attributes = New-Object
"Microsoft.Xrm.Sdk.Deployment.AttributeCollection"
$attribute1 = New-Object "System.Collections.Generic.KeyValuePair[String, Object]"
("S2SDefaultAuthorizationServerPrincipalId", "00000001-0000-0000-c000-
000000000000")
$setting.Attributes.Add($attribute1)
$attribute2 = New-Object "System.Collections.Generic.KeyValuePair[String, Object]"
("S2SDefaultAuthorizationServerMetadataUrl",
"https://accounts.accesscontrol.windows.net/metadata/json/1")
$setting.Attributes.Add($attribute2)
Set-CrmAdvancedSetting -Entity $setting
```

```
PS C:\Program Files\Microsoft Dynamics CRM\Tools> Add-PSSnapin Microsoft.Crm.PowerShell
PS C:\Program Files\Microsoft Dynamics CRM\Tools> $setting = New-Object "Microsoft.Xrm.Sdk.Deployment.ConfigurationEntity"
PS C:\Program Files\Microsoft Dynamics CRM\Tools> $setting.LogicalName = "ServerSettings"
PS C:\Program Files\Microsoft Dynamics CRM\Tools> $setting.Attributes = New-Object "Microsoft.Xrm.Sdk.Deployment.AttributeCollection"
PS C:\Program Files\Microsoft Dynamics CRM\Tools> $attribute1 = New-Object "System.Collections.Generic.KeyValuePair[String, Object]" ("S2SDefaultAuthorizationServerPrincipalId", "00000001-0000-0000-c000-000000000000")
PS C:\Program Files\Microsoft Dynamics CRM\Tools> $setting.Attributes.Add($attribute1)
PS C:\Program Files\Microsoft Dynamics CRM\Tools> $attribute2 = New-Object "System.Collections.Generic.KeyValuePair[String, Object]" ("S2SDefaultAuthorizationServerMetadataUrl", "https://accounts.accesscontrol.windows.net/metadata/json/1")
PS C:\Program Files\Microsoft Dynamics CRM\Tools> $setting.Attributes.Add($attribute2)
PS C:\Program Files\Microsoft Dynamics CRM\Tools> Set-CrmAdvancedSetting -Entity $setting
PS C:\Program Files\Microsoft Dynamics CRM\Tools>
```

Step-12: Run the Enable Server-Based SharePoint Integration Wizard in the D365 (http://org2020/orgname/main.aspx#613453)

Step-13: Navigate to Settings --> Document Management --> Enable server-based SharePoint integration.

Step-14: For the SharePoint sites, select Online, and then select Next.
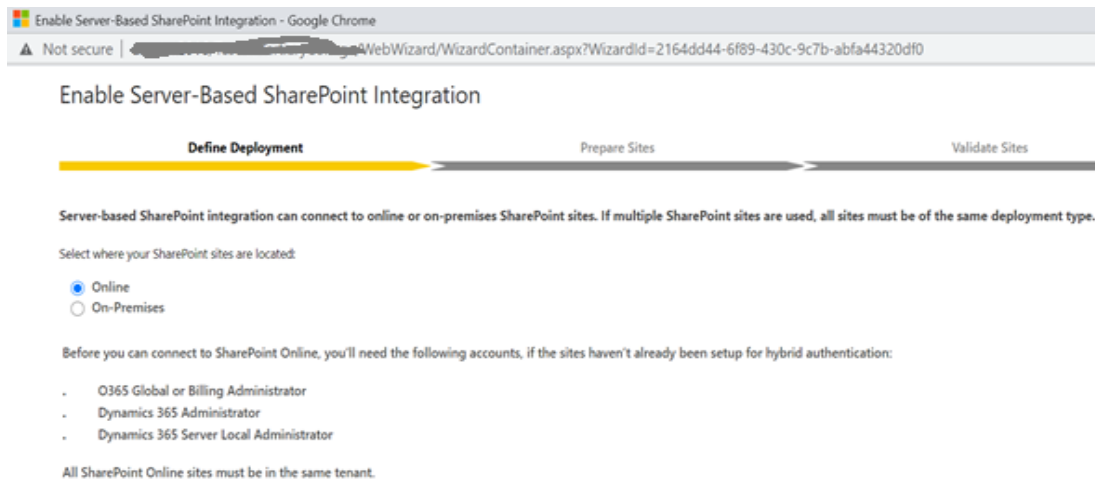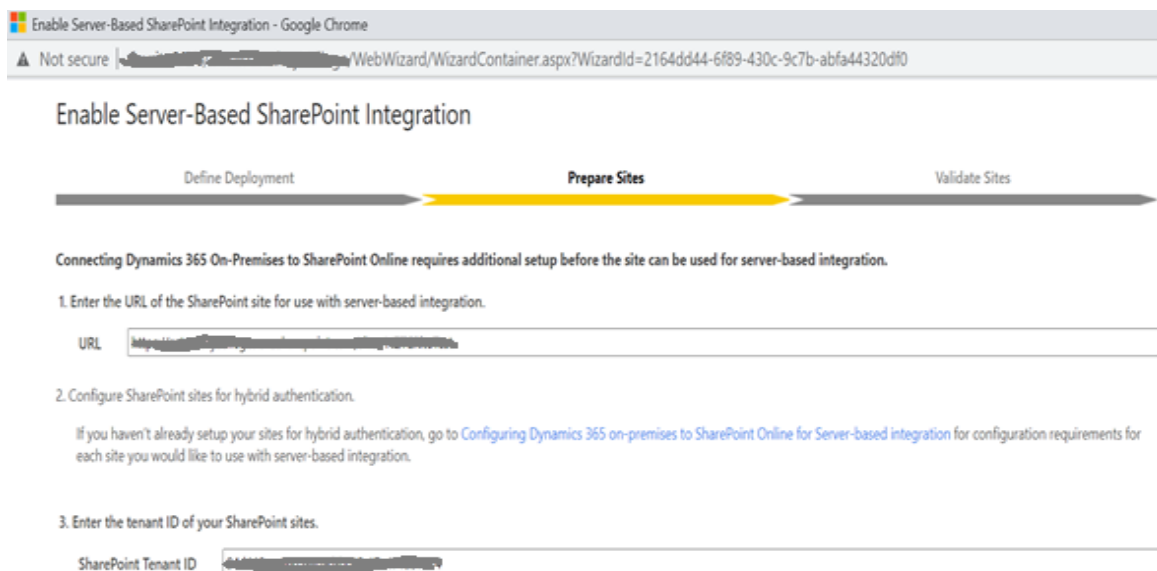
Step-15: Enter the SharePoint Online site
collection URL: https://orgname.sharepoint.com/sites/environment

Step-16: Get the SharePoint online tenant ID

In the Azure Active Directory module for Windows PowerShell shell, run the
following commands:

$CRMContextId = (Get-MsolCompanyInformation).
ObjectID $CRMContextId

Step-17: Enter the tenant ID, Click Next

Step-18: The validate sites section appears. If all sites are determined to be valid.

Enable Server-Based SharePoint Integration - Google Chrome

⚠ Not secure | ▬▬▬▬▬▬▬▬▬▬▬ /WebWizard/WizardContainer.aspx?WizardId=2164dd44-6f89-430c-9c7b-abfa44320df0

Enable Server-Based SharePoint Integration

Define Deployment → Prepare Sites → **Validate Sites**

Validation Status: Complete

Name	Absolute URL	Validation
Default Site	https://▬▬▬▬▬▬▬▬▬	Valid

Step-19: Click Enable

Enable Server-Based SharePoint Integration - Google Chrome

⚠ Not secure | ▬▬▬▬▬▬▬▬ /Web/Wizard/WizardContainer.aspx?WizardId=2164dd44-6f89-430c-9c7b-abfa44320df0

Configure Server-Based SharePoint Integration

Congratulations!
Server-based SharePoint integration is now complete!

You've added a new SharePoint site URL, but you'll need to go to the Document Management Settings Wizard and enable the automatic folder generation for the site before you can view your documents in Dynamics 365.

☐ Open Document Management Settings Wizard

Finish

← → C 🔒 ▬▬▬▬▬.sharepoint.com/sites/▬▬▬▬/_layouts/15/viewlsts.aspx?view=14

SharePoint   🔍 Search

▬▬▬▬▬
Private group

Home
Conversations
Documents   Contents   Subsites
Notebook
Pages
Site contents
Recycle bin
Edit

☐	Name	Type	Items	Modified
🗂	▬▬▬	Document library	0	10/2/2020 5:11 PM
🗂	Category	Document library	0	10/2/2020 5:11 PM
🗂	Documents	Document library	0	5/10/2020 6:19 AM
🗂	Form Templates	Document library	0	5/22/2020 12:28 PM
🗂	Site Assets	Document library	5	5/25/2020 9:29 AM
🗂	▬▬▬	Document library	0	10/2/2020 5:11 PM
🗂	Style Library	Document library	0	5/10/2020 6:19 AM
🗂	Site Pages	Page library	1	5/10/2020 6:19 AM

Step-20: Create and upload documents to the D365:
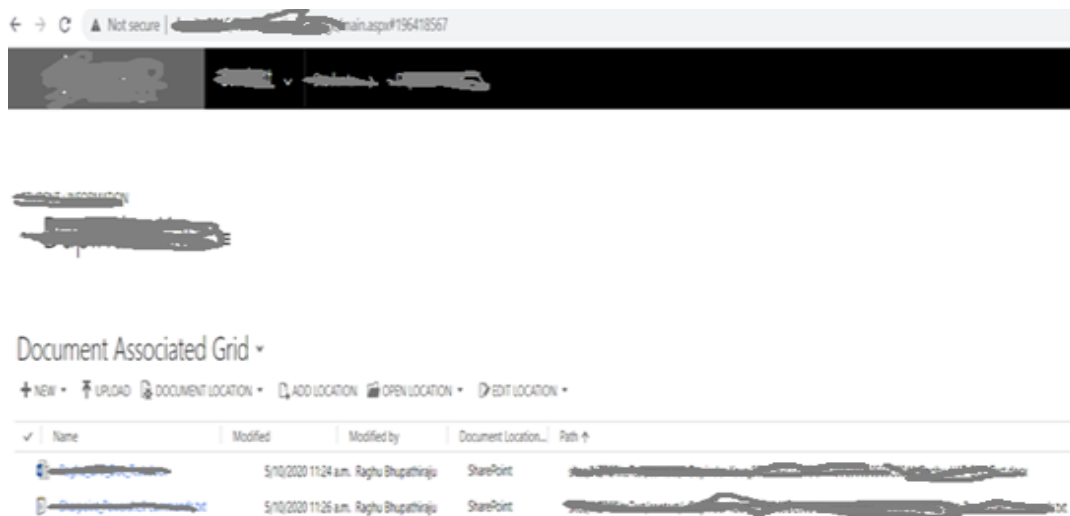
Step-21: Login Open SharePoint Online and see that they are synchronized as below:

Reference:https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/admin/on-prem-server-based-sharepoint-online
https://debajmecrm.com/2018/06/25/crm-on-premise-to-sharepoint-online-integration-common-obstacles-faced-and-their-work-around/