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 (<u>https://docs.microsoft.com/en-us/previous-versions/dynamicscrm-2016/deployment-administrators-guide/dn609803(v=crm.8)?redirectedfrom=MSDN)-</u> 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)

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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:

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8. In order to get the .pfx file, you need to use this tool: <u>https://decoder.link/converter</u>

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".

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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)

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

\$RootDomain = "*.contoso.com" \$CRMAppId = "00000007-0000-0000-c000-00000000000" 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

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S C:\Program Files\Microsoft Dynamics (RM\Tools)	\$CRM = Get-MsolServicePrincipal -AppPrincipalId \$CRMAppId
S C:\Program Files\Hicrosoft Dynamics (RH\Tools)	<pre>\$ServicePrincipalName = \$CRM.ServicePrincipalNames</pre>
C: VProgram Filles Wicrosoft Dynamics CRW/Tools>	<pre>\$ServicePrincipalName.Remove("\$CRWAppId/\$RootDomain")</pre>
ve	
S C:\Program Files\Microsoft Dynamics (RM\Tools)	<pre>\$ServicePrincipalName.Hdd("\$C\$MAppId/\$RootDomain")</pre>
6 C:\Program Files\Hicrosoft Dynamics (RH\Tools)	Set-MsolServicePrincipal - AppPrincipalId \$C8WAppId - ServicePrincipalNames \$ServicePrincipalName
S C:\Program Files\Wicrosoft Dynamics (RW\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", "0000001-0000-0000-c000-00000000000") \$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



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

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

Step-14: For the SharePoint sites, select Online, and then select Next.

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Enable Server-Based SharePoint Integration	I.						
Define Deployment	Prepare Sites	Validate Sites					
Server-based SharePoint integration can connect to online or on-premi	ses SharePoint sites. If multiple SharePoint sites are use	ed, all sites must be of the same deployment type.					
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Select where your SharePoint sites are located: Online On-Premises Before you can connect to SharePoint Online, you'll need the following ar O365 Global or Billing Administrator Dynamics 365 Administrator Dynamics 365 Server Local Administrator	ccounts, if the sites haven't already been setup for hybrid	authentication:					

Step-15: Enter the SharePoint Online site collection URL: <u>https://orgname.sharepoint.com/sites/environment</u>

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





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Step-19: Click Enable

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Step-20: Create and upload documents to the D365:

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Step-21: Login Open SharePoint Online and see that they are synchronized as below:

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