



Archive Document Management for Dynamics CRM®

Archive document management powered by
Microsoft Dynamics CRM2011/2013®



Seamless integration to
Microsoft Office® Outlook, Excel and Word

Archive Dynamics Collaboration Portal extends
the reach of CRM documents to internal or
external users

Powered by





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In Depth Archive Document Management

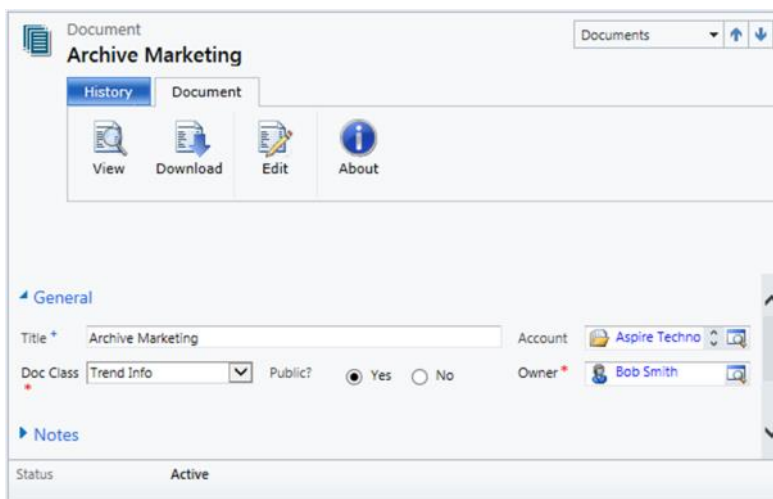
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Archive Solution Summary

Embedded within Dynamics CRM2011/2013®

Archive is embedded within Dynamics CRM2011/2013® and there are no additional client applications to learn. The familiar CRM user interface encourages early user adoption ensuring an effective Document Management System to enhance your CRM investment.



Low administration overhead. Once installed and setup on the CRM server, there is no further administration required.

Secure Document Storage & Compression

Documents are compressed and encrypted using AES 128-bit and are stored on any network storage device rather than the database. Document decryption only occurs when an authorised user retrieves a document. Compression and storage to disk prevents enlarging the SQL database.



Using CRM 2011/2013 security roles, all access can be secured for the appropriate users.



Archive Solution Summary

Full Document Lifecycle

Documents can be edited and multiple versions stored. A document's history is instantly viewable, older versions can be archived to a separate library.



Import service for migration & mailrooms

Archive includes an import service for mailroom scanned images or migrating existing file system documents. New documents can be imported with the appropriate metadata automatically assigned.

Instant Retrieval & Microsoft Office® Add-In

Documents can be retrieved from wherever CRM can be accessed. In addition the Microsoft Office® Archive add-in for Excel/Word 2010/2013, drives efficient document management using familiar day to day applications.





Archive Solution Summary

Fully customisable

Documents are entities within CRM that can have customised attributes. This allows as complex a document taxonomy as required.



New forms and attributes can be created, relationships with other entities can be defined. Archive utilises the power of xRM.

Parent/Child relationship structures can be defined for your documents. As Archive entities are CRM entities, access and control can be secured using the standard CRM security model.

Share and Collaborate with Dynamics Collaboration Portal

Multiple users can access documents simultaneously through CRM or the Office Add-In.



Extend the reach of Dynamics 2011/2013 to your entire user base and external parties. Portal users can download, view or update documents and data from outside the Dynamics CRM2011/2013 application.



Archive Key Features

Archive Toolbar for Dynamics CRM2011/2013®



Document retrieval and edit, are easily accessible in the Archive Toolbar.

Through simple navigation and rich functionality the Archive Toolbar for CRM, Excel and Word enable the workforce to drive efficient document management throughout the business.

Archive Toolbar for Microsoft Outlook, Excel & Word®



Embedded in the Office Ribbon, users can access Archive from a familiar user interface.





Archive Key Features

Archive Search

The screenshot shows a 'Document Store Search' window with the following search criteria:

- Document Type: All documents? Document
- Filters:
 - Title: [Empty text box]
 - Checked out to me?
 - Created by me?
 - Owned by me?
 - Owned by: [Empty dropdown]
 - Created on: Select a date [Calendar icon]
 - Account: Aspire Technologies Limited
 - Doc Class: [Empty dropdown]
 - Public?: True False

Buttons: Clear, Find

Document Type	Title	Version	Checked Out?	Checkout User
Document	Aspire Technologies - Introduction	6.0	False	
Document	Getting more from your Customer Relationship Management	4.0	False	
Document	Archive Marketing	3.0	False	
Document	Invite	2.1	False	

Buttons: Open

Advanced search capabilities within Excel and Word, reduce the time taken to retrieve, download and update documents collaboratively, collectively and securely.

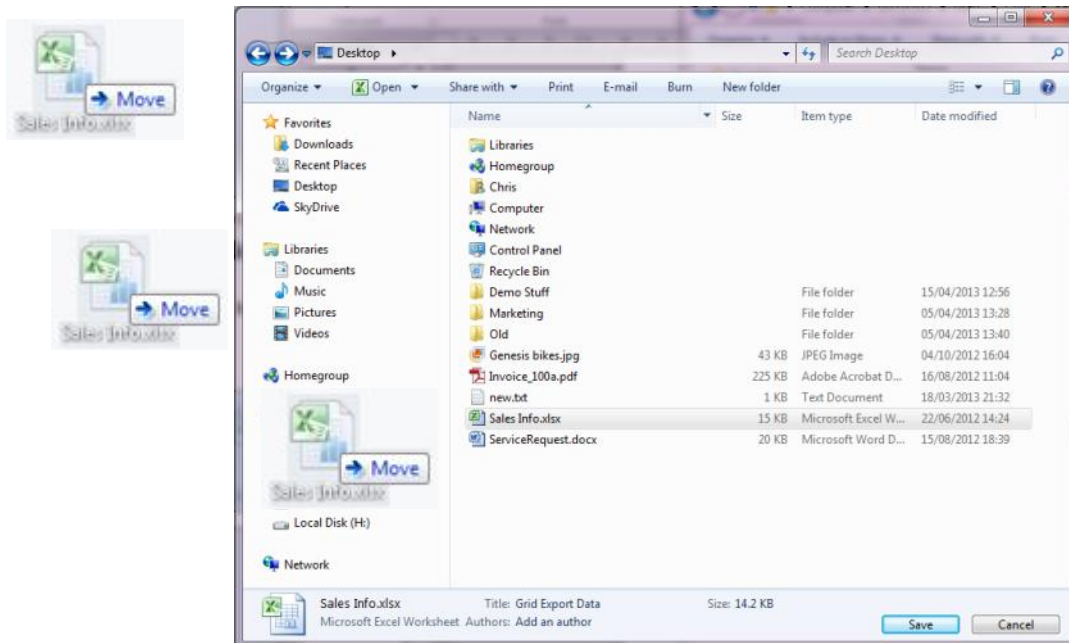
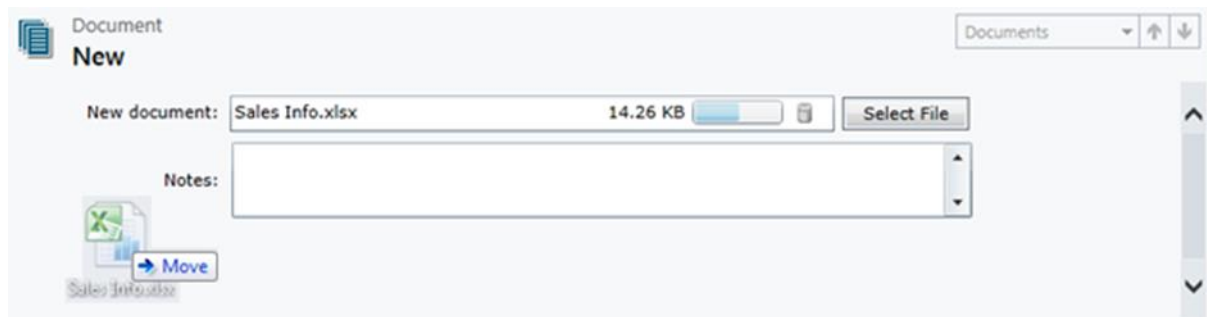
Search criteria can be modified to meet your needs. Search by Document Type, Owner, or any other document field important to your business.



Archive Key Features

Drag & Drop File Upload

Uploading files to Archive is fast and easy. You can drag and drop onto the Toolbar, browse to your files using Windows Explorer, or drag files directly into the new document upload window.





Archive Key Features

Multiple Document Upload

Uploading multiple files with Archive's Multiple Document Upload Dashboard is a favourite feature. Drag & drop or click & browse, the upload dashboard allows you to set key fields, upload various file types, all in a user-friendly CRM dashboard.

Dashboard: Multiple Documents Upload ▾

Add Multiple Documents

Document Type: Document ▾ All Docs

Title : Genesis bikes	Details
Genesis bikes.jpg 42.02 KB Finished ✓ Select File	Preview
Title : Sales Info	Details
Sales Info.xlsx 14.26 KB Finished ✓ Select File	Preview
Title : Invoice_100a	Details
Invoice_100a.pdf 224.72 KB Finished ✓ Select File	Preview
Title : ServiceRequest	Details

Add Remove Clear Upload

Select files from Windows Explorer, 'lasso' them from your desktop, set criteria and simply 'drop' the files onto the dashboard. It's that easy to use!

Files and documents can be uploaded into the system in the minimum amount of time, with very little effort. A document management system accepted by users across the business, guarantees a return on your investment.



Archive Key Features

Image Preview Embedded in Forms

Images in Archive can be previewed within CRM2011/2013.

If a document type has multiple images, these can be previewed using our Image Previewer . A simple left/right arrow control allows you to flick through your images.

For example if you were storing cars in your CRM system, you could browse through the various stock photos.

The screenshot shows a CRM form for 'Cars' with the title 'Audi R8'. The form has a 'General' tab selected. The fields are:

Name *	Audi R8
Manufacturer	Audi
Year	2013
Value	£95,000.00

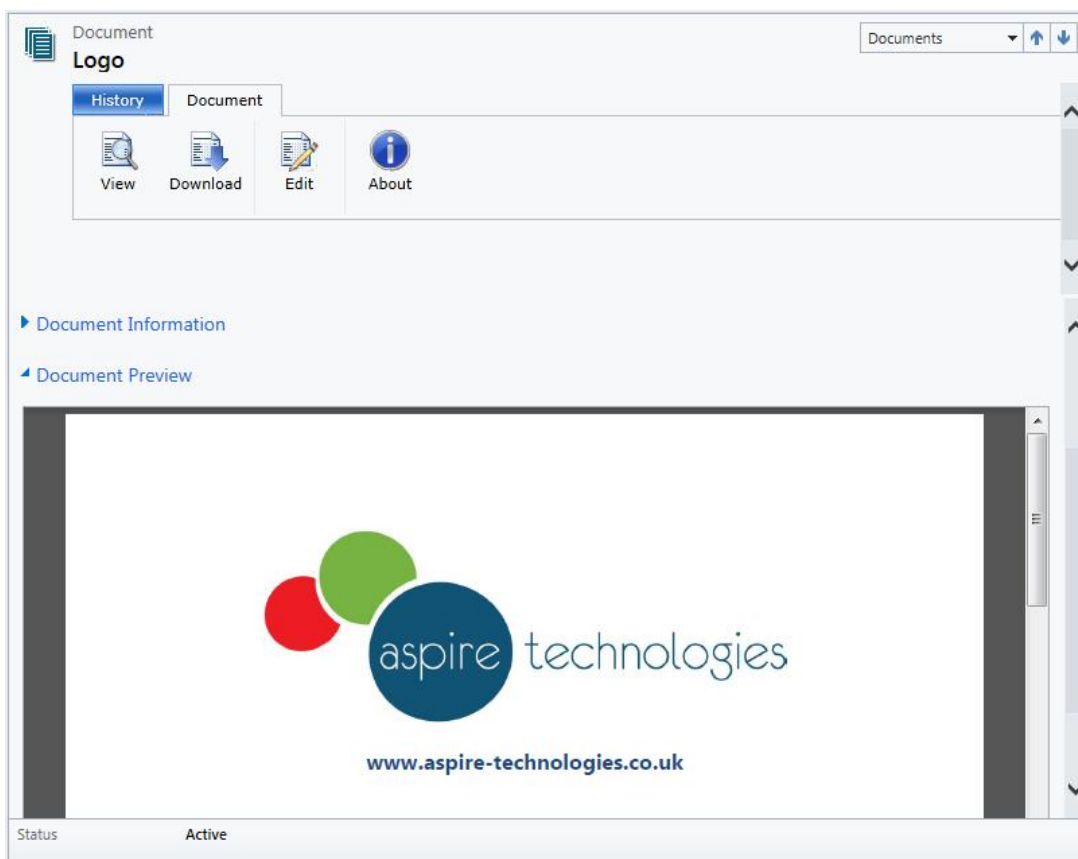
To the right of the form is an image previewer. It displays a white Audi R8 sports car. Below the image are navigation arrows, the text 'AR81', and 'Open' and 'View' buttons. In the top right corner of the form, there is a dropdown menu set to 'Cars' and two small arrows (up and down).



Archive Key Features

Document Preview in an iFrame

Other documents such as PDF's can be shown within an iFrame embedded on the form. Saving time by allowing users to immediately preview their documents.





Archive Key Features

Preview Images in Charts

For fast and efficient document selection it is possible to configure Archive document types to display images in CRM data visualisation charts.

You may wish to browse a product catalogue, flip through a register of employee images or company assets.

Archive preview images in charts allows fast, effective and efficient document selection and retrieval.

The screenshot shows a CRM interface with a table of cars and a preview window. The table has columns for Name and Created On. The preview window shows a white Audi R8 with license plate EN R8553.

Name	Created On
Alfa Romeo Spider	27/03/2013 15:25
Audi R8	18/03/2013 12:54

Car Photos

AR81

Open View



In Depth Archive Document management

Document Lifecycle

Archive's full document lifecycle allows you to store multiple versions of documents, view their history, review any changes that were made and who made them.

Referential documents may rarely change whilst other documents are produced in a more iterative manner with multiple people collaborating on the production of a single document. Whilst documents may be edited by many different people from many departments, Archive will only allow the document to be checked out by one user at any time.



'Checking Out' locks the document to ensure only the 'Checked out by' user can make changes. Other users are prevented from editing a 'Checked Out' record, but they may still view, preview or retrieve previous versions, if they have the appropriate permissions.

Once a user has completed a document edit, the document is 'Checked In' the revision is set to either a major or minor version and the older version is moved to history. Only the current version can be edited, but from the Archive toolbar you can review older versions. All preview screens within Dynamics CRM2011/2013 will only display the current version.

Historical versions can be archived. When documents are archived they are moved to the archive library, which reduces storage space in the main document library. When CRM records are deactivated, documents are automatically archived.

Archived documents can be viewed but cannot be edited.



In Depth Archive Document management

Document Security

Archive ensures that all documents uploaded to the Archive web cache are compressed and stored securely. Archive Library Service (ALS) manages the movement of documents between the upload cache and document libraries.



ALS runs using credentials of an Active Directory user and the document library location can be any form of NAS (Network Attached Storage) that implements NTFS security (using Windows Active Directory).

When a document is stored in the upload cache, the ALS will obfuscate the filename and encrypt the contents using the AES encryption standard. The file is then compressed and moved to the document library.

When a user requests to view or edit a document, ALS is asked to retrieve the document from the library and transfers it to the download cache. The file remains encrypted and its filename remains obfuscated. When the user makes the decision (via Internet Explorer) to open or save the document, the file is then decompressed, decrypted and streamed directly from the server to the users browser. This ensures document security when retrieving document from the server.



In Depth Archive Document management

Customisable CRM Entities

Archive entities are CRM entities that can be fully customised from within CRM 2011./2013. New forms and attributes can be created for your business needs and relationships with other entities can be defined.

To initially create an Archive entity you can use the 'CRM Document Entity Configuration' tab of the application settings program installed on the web server. This creates the basic CRM entity with a set of basic views, the document preview button and the document entry form.

You can customise the basic form or create a new entity form to meet your requirements. You can add fields and customise views. In small organisations 1 or 2 document types maybe sufficient, but as an organisation grows, so does its document management requirements. With Archive you have the choice to create as many as are appropriate to your business.

Relationships can be defined between Archive documents and standard, or custom CRM entities creating a parent/child relationship structure. For example you could create an Archive entity called 'Account Document' and create a 'one to many' relationship between Account and Account Document. Any Account Documents would have one single account as its parent, thereby restricting and relating the document to that account.

Many to many relationships can also be created. This allows a document to be shared across multiple entities including different types of entities. Any edits to those documents will therefore be seen by all the entities with a link to that document. For standard 'boiler plate' documents this can be a distinct advantage and reduce the library storage requirements.

As the Archive entities are ordinary CRM entities, access and control can be secured as with any other entity in CRM 2011/2013 using the standard CRM security model.



In Depth Archive Document management

A Comparison of Archive & SharePoint

SharePoint maybe described as a document resource for Company handbooks and forms, internal policies and procedures, but that doesn't constitute SharePoint as a true Document Management System (DMS).

SharePoint allows you to upload files into categories and folder structures. But again, this isn't true DMS.

There are technical imitations and on-going costs of SharePoint installations through continual development and support charges. Licences can be cheap but the cost of ownership and maintenance is high. With its own server infrastructure and never ending reliance on SharePoint experts continual customisation, configuration and support, rendering the return on investment fruitless.

Technical limitations include:

- Documents are stored in the database. This is a very slow way to store documents and can result in extremely large, unmanageable CRM databases
- In SharePoint you can't mix different document types in the same folder. In most DMS you may have a folder containing different types i.e. Personal folder with a subset containing Salary, Contract etc. or a Project folder for RFI, Proposals, Invoices etc. With SharePoint you must define a super set of all the possible metadata
- A lack of Access Control Lists (ACL) at the document level allowing you to have different access levels in the same folder
- Users can access documents via SharePoint without being subject to Dynamics ACL
- New employees need to be added to Dynamics and SharePoint to gain access to documents



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