



Attachments2OneDrive

Setup Guide

Reduce remote database size, save on cloud storage costs, retain attachment shortcuts in Act!, boost database performance, and improve collaboration by moving Act! attachment storage to OneDrive Business.



Act! Database connection mode: **Direct SQL Connection**

SQL Logon options:

Windows Authentication: the current Windows user has read and write access to the SQL instance hosting the Act! database.

The screenshot shows the 'Act! Database Settings' window. On the left is a navigation pane with 'Act! Database', 'OneDrive', 'Scheduled Task', and 'Help'. The main area is titled 'Act! Database Settings'. At the top, there are two radio buttons: 'Use Direct SQL Connection' (selected) and 'Use local Act! database'. Below this, there are two text input fields: 'Act! Database Name' with the value 'Act2019Demo_2' and 'SQL Server Name' with the placeholder text 'leave blank if the Act! database is hosted on the current computer'. At the bottom, there are two radio buttons: 'Use Windows Authentication' (selected) and 'Use SQL Authentication'.

SQL Authentication: enter a SQL username and password for to access the Act! database.

Note: This will not be the same username and password as used to login via the Act! Application.

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Act! Database connection mode: **Local Act! Database**

Due to limitation with the Act! SDK, processing of Attachments associated with Note record is unavailable when using this connection method.

Act! Database	Act! Database Settings	
OneDrive	<input type="radio"/> Use Direct SQL Connection <input checked="" type="radio"/> Use local Act! database	
Scheduled Task	Act! Database Name	Act2022Demo
Help	Database Host	leave blank if the Act! database is hosted on the current computer
	Act! Username	Chris Huffman
	Act! Password	



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Choose process only Attachments associated with specific Act! record types, or all Attachments in the Database.

Select to wait a period of time before an Attachment is moved to OneDrive. This can be any combination of X years Y months Z days. Leave this field blank to move every Attachment as soon as possible.

This applies to the Start Date for Activity and History records and the Display Date for Note records.

Act! Record Settings

Process attachments linked to the following record types Activities Documents History Notes

Process attachments after **1 year**

- 30 days
- 6 months
- 1 year
- 7 years



To determine the SharePoint URL, open your OneDrive/SharePoint location in a web browser and copy the address from the browser's address bar (without the http:// prefix)

Act! Database	SharePoint/OneDrive Settings	
OneDrive	SharePoint URL <small>https://</small>	<input type="text" value="Sharepoint Site URL or leave blank for default OneDrive site"/>
Scheduled Task	Email Account	<input type="text" value="Office365 Email Address"/> <input type="button" value="Authorise"/>
Help		

To authorise access to the online folder, enter your email address and press the Authorise button. This will open a web page asking you to login to your Microsoft account. Follow the wizard and enable access for the Attachment2OneDrive application.

Once successfully Authorise, the button on the screen will display as Deauthorise.



Use the Register button in the top right of the window to register the application or renew a subscription.

Your current subscription or trial expiry date will be also displayed in the top right of the form.



The email address on the popup register form will pre-populate from the email address entered on the OneDrive tab of the settings window.



A two-week trial period is available by pressing the **Start a 2 week trial** button.

While in the trial period, only Attachments associated with Act! User My Records will be processed.



Add this application to the Windows Task Scheduler, to have it automatically run at set intervals.

Act! Database	Windows Scheduled Task	
OneDrive	Task Name Attachments2OneDrive for Act2022	
Scheduled Task	<input type="button" value="Create Windows Scheduled Task"/>	<input type="button" value="Open Windows Task Scheduler"/>
Help		

Create Windows Scheduled Task button will create a new task in the Task Scheduler, using the task name specified on the form.

The default schedule is to run daily every 10 minutes 7:05AM to 7:05PM.

This can be adjusted to suit your needs via the Windows Task Scheduler. Press the **Open Windows Task Scheduler** button to display the Task Scheduler.