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Helping your business
grow faster

2IDENTIFY

January 2018

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Click on each icon or number to go directly to the respective area

2IDENTIFY
By NOESIS

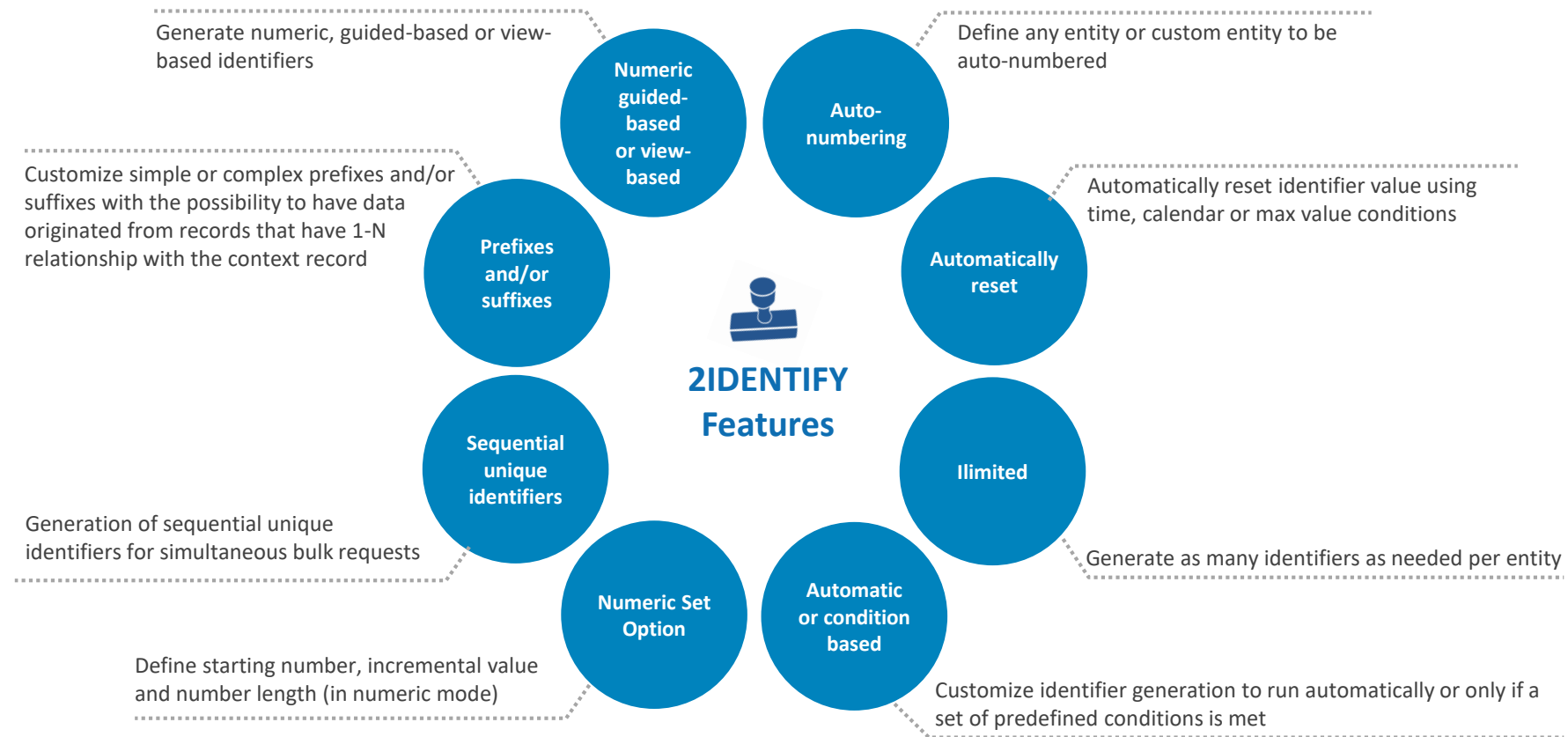**www.noesis.pt**

Introduction

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What is it?

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What is 2IDENTIFY?

Definition	Goal	Usability

2IDENTIFY is a product...

...to **spot records** and **to insert identification fields** into any **entity** within Dynamics 365

...it offers the capability to randomly create identifiers **using different criteria** and / or **expression combinations** to be applied into multiple fields on the selected entity

XXXXXXXXX

CRITERIA X

CRITERIA 1

CRITERIA 2

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2IDENTIFY key features

Generate numeric, guided-based or view-based identifiers

Define any entity or custom entity to be auto-numbered

Numeric guided-based or view-based

Auto-numbering

Customize simple or complex prefixes and/or suffixes with the possibility to have data originated from records that have 1-N relationship with the context record

Prefixes and/or suffixes

Automatically reset identifier value using time, calendar or max value conditions

Automatically reset

2IDENTIFY Features

Sequential unique identifiers

Ilimited

Generation of sequential unique identifiers for simultaneous bulk requests

Generate as many identifiers as needed per entity

Numeric Set Option

Automatic or condition based

Define starting number, incremental value and number length (in numeric mode)

Customize identifier generation to run automatically or only if a set of predefined conditions is met

Configuration

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Click on each icon or number to
go directly to the respective area

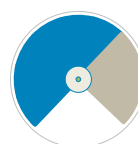**2IDENTIFY**
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Install & Configuration

Installation in three steps

1
Go to Windows Store App
Or: https://appsource.microsoft.com
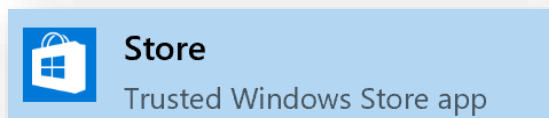
2
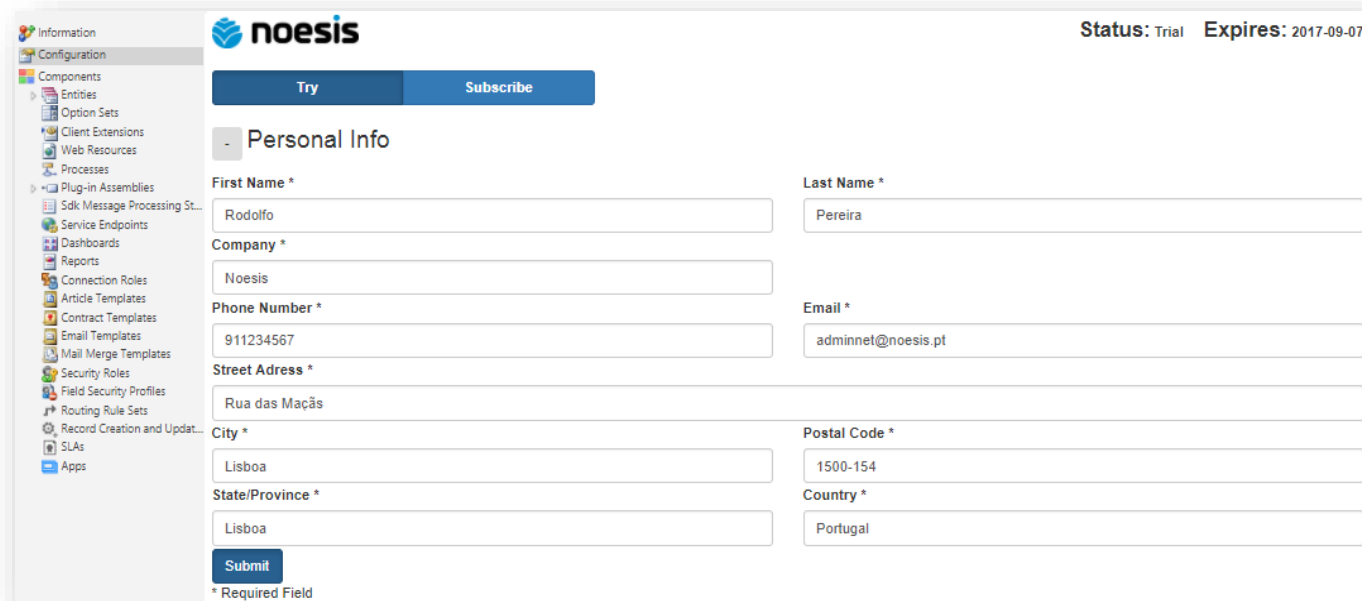**Search for "2IDENTIFY"**

3
Press Free Trial
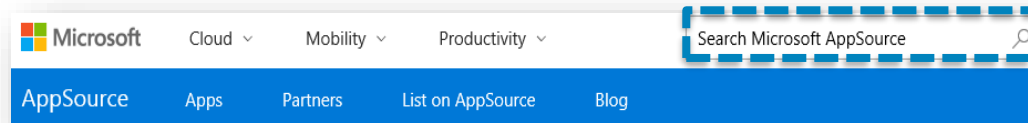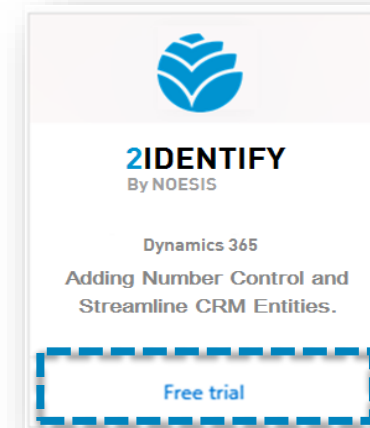
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2IDENTIFY Configuration

Installation is done

Activate 2IDENTIFY in Configuration Page

To register it is possible to choose a Try or to Subscribe the 2IDENTIFY

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2IDENTIFY Configuration

To subscribe in addition to personal info add the Billing and the Licensing Info.

Security Roles

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What is a Security Role?

If you would like a user to be able to create new a 2IDENTIFY configuration they should be assigned the **Unique Identifier Configurator Security Role**. A Security Role defines how different users, such as salespeople, access different types of records. To control access to data, you can modify existing Security Roles, create new Security Roles, or change which Security Roles are assigned to each user. Each user can have multiple Security Roles.

The Unique Identifier

Configurator **Security Role**…

is the **permission** for a user **to create**…

a **New 2IDENTIFY Configuration**

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Types of Security Roles

Users who you would like to have access to the 2IDENTIFY solution should be assigned the 2IDENTIFY **Unique Identifier User** or **Unique Identifier User BU Security Role**

User
Organization Security Level

BU
Business Unit Security Level

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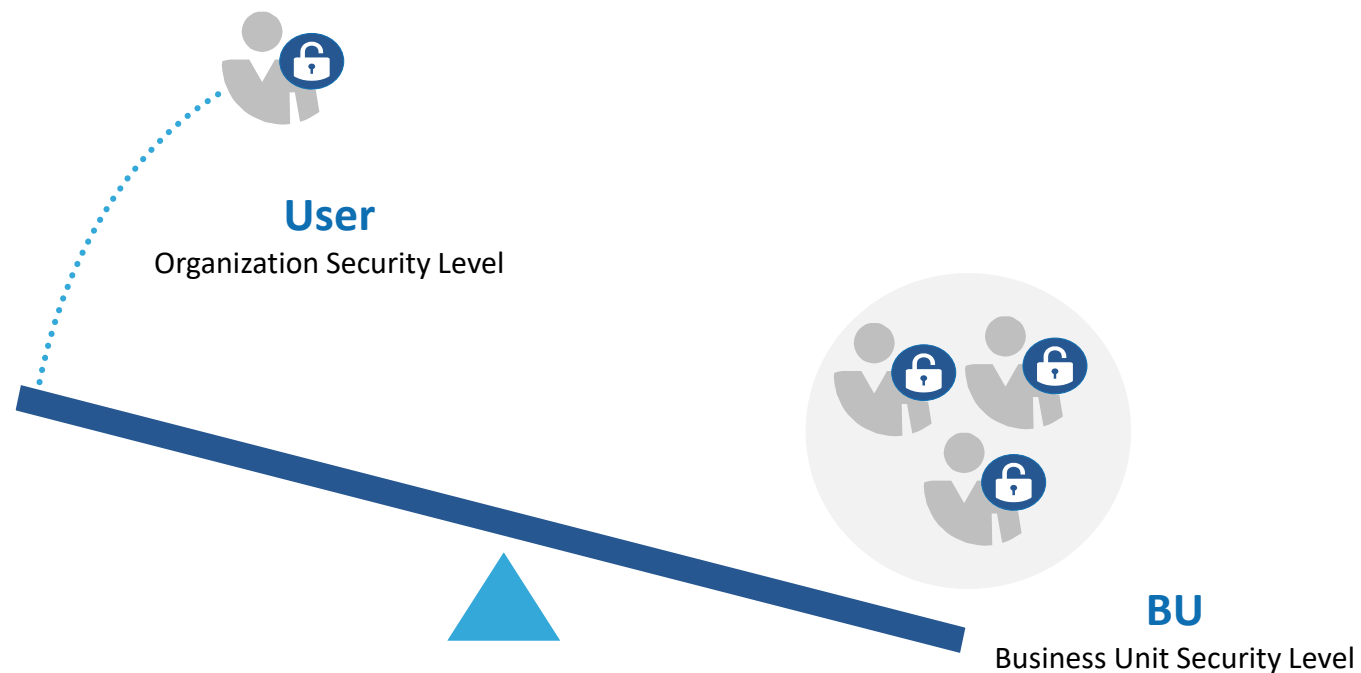
How to assign Security Roles

Go to **Settings**, **Security** and click on **Security Roles**

How to assign Security Roles

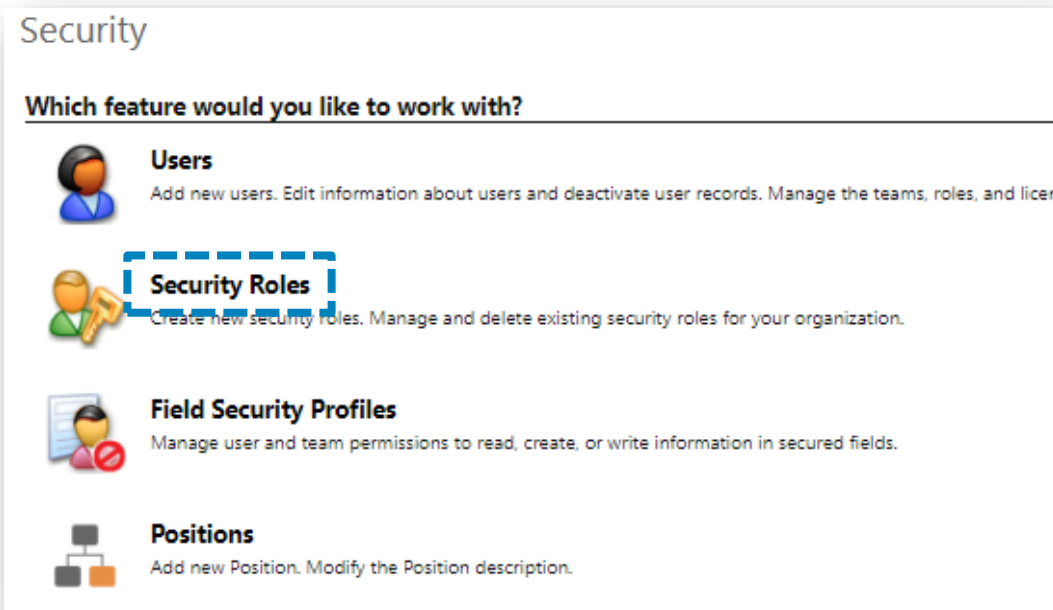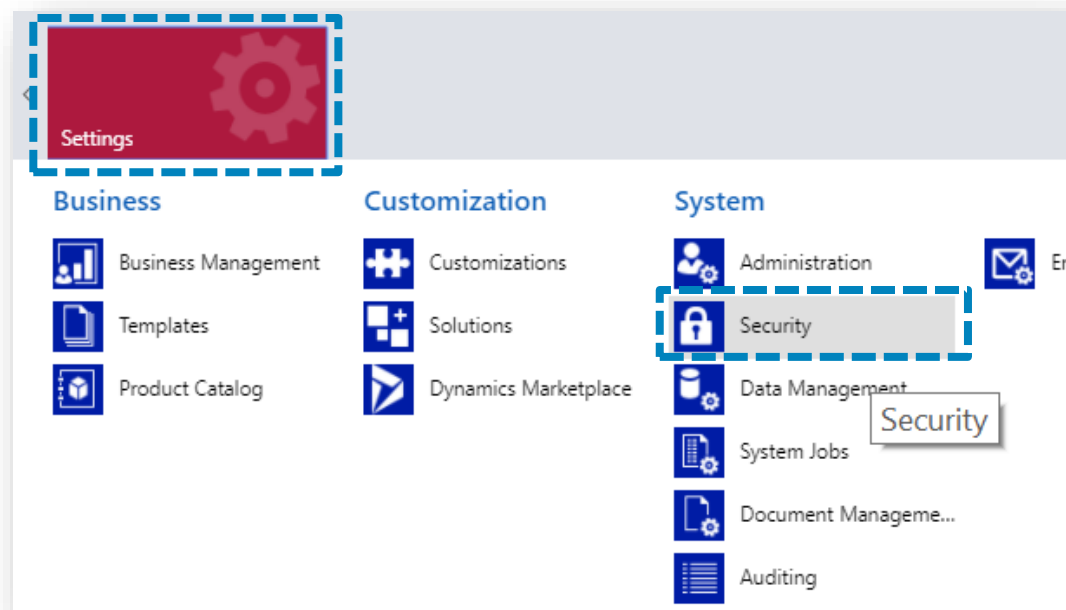Click on **New**. Then, there are tabs to insert the key security permissions wanted. The tabs to complete are: **Details**, **Core Records**, **Marketing**, **Sales**, **Service**, **Business Management**, **Service Management**, **Customization**, **Missing Entities**, **Business Process Flows** and **Custom Entities**. The permission levels available are: **None Selected**, **User**, **Business Unit**, **Parent: Child Business Units** and **Organization**. At the end of this chapter you will find further information regarding this matter if needed
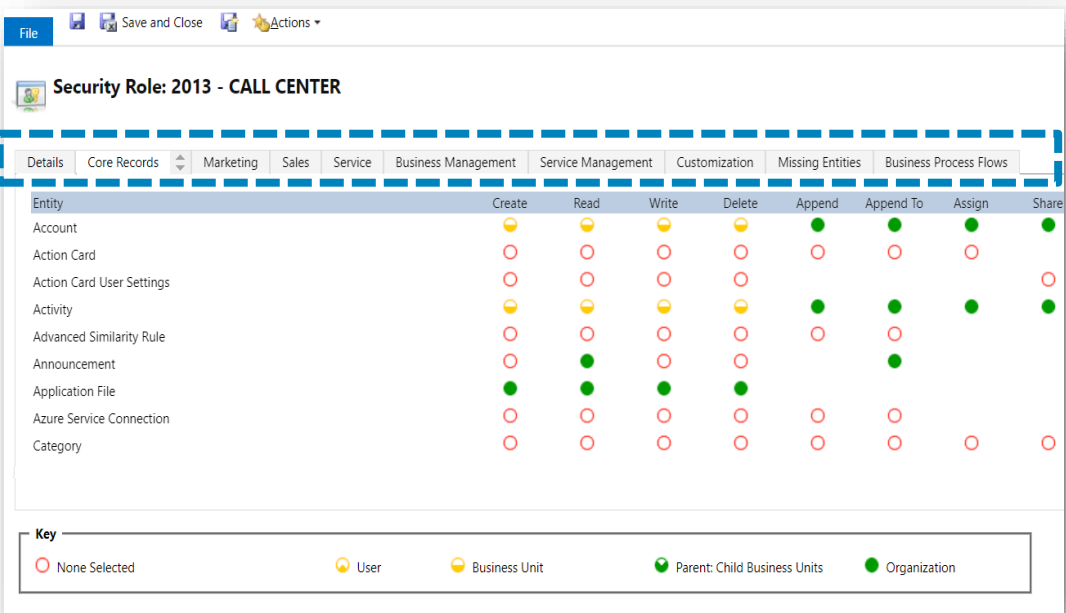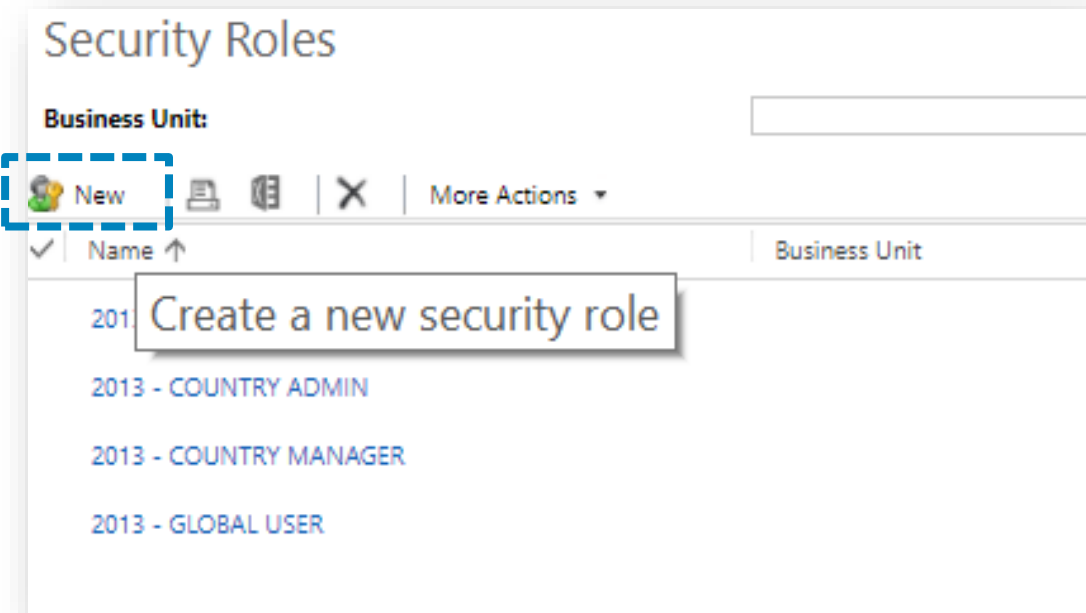
Security Roles – for 2IDENTIFY

To allow a user create new a 2IDENTIFY configuration there's a need to assign him a **Unique Identifier Configurator User** or **Unique Identifier User BU Security Role**. The two next slides explain how in detail

Unique Identifier User

Steps to assign a user with the **Unique Identifier Configurator User Security Role**:

1. Details tab: give the name **Unique Identifier User**
2. Customization tab: give Organization permission to read to Plug-in Assymbly; Plug-in Type; Sdk Message, Sdk Message Processing Step, Sdk Message Processing Step Image

Unique Identifier User

3. Business Process Flows tab: give Organization permission to create, read, write, delete, append and append to, to all the list with exception of PO Receipt

Unique Identifier User

4. Custom Entities tab: give **Organization** permission to read and write of **Unique Identifier Configuration**

Unique Identifier User BU

Steps to assign a user with the **Unique Identifier Configurator User BU Security Role**:

1. Details tab: give the name **Unique Identifier User BU**

2. Customization tab: give Organization permission to read to Plug-in Assymbly; Plug-in Type; Sdk Message, Sdk Message Processing Step, Sdk Message Processing Step Image

3. Business Process Flows tab: give Organization permission to create, read, write, delete, append and append to, to all the list with exception of PO Receipt

4. Custom Entities tab: give **Business Unit** permission to read and write of **Unique Identifier Configuration**

Additional information regarding Security Roles definition

- Security Role privileges are **cumulative**: having more than one Security Role gives a user every privilege available in every role.

- Each Security Role consists of record-level privileges and task-based privileges.

- Record-level privileges define which tasks a user with access to the record can do, such as **Read**, **Create**, **Delete**, **Write**, **Assign**, **Share**, **Append**, and **Append To**. Append means to attach another record, such as an activity or note, to a record. Append to means to be attached to a record. More information: Record-level privileges.

- Task-based privileges, at the bottom of the form, give a user privileges to perform specific tasks, such as publish articles or perform a mail merge**.**

- **The coloured circles on the Security Role settings page define the access level for that privilege**. Access levels determine how deep or high in the organizational business unit hierarchy the user can perform the specified privilege. The following table lists the levels of access in Microsoft Dynamics 365 and in the **next slide it is the description of each level**.

Key			
○ None Selected	◖ User	◖ Business Unit	◕ Parent: Child Business Units	● Organization

Additional information regarding Security Roles definition

● **Global.** This access level gives a user access to all records in the organization, regardless of the business unit hierarchical level that the instance or the user belongs to. Users who have Global access automatically have Deep, Local, and Basic access, also.

Because this access level gives access to information throughout the organization, it should be restricted to match the organization's data security plan. This level of access is usually reserved for managers with authority over the organization.

The application refers to this access level as **Organization**.

● **Deep.** This access level gives a user access to records in the user's business unit and all business units subordinate to the user's business unit.

Users who have Deep access automatically have Local and Basic access, also.

Because this access level gives access to information throughout the business unit and subordinate business units, it should be restricted to match the organization's data security plan. This level of access is usually reserved for managers with authority over the business units.

The application refers to this access level as **Parent: Child Business Units**.

● **Local.** This access level gives a user access to records in the user's business unit.

Users who have Local access automatically have Basic access, also.

Because this access level gives access to information throughout the business unit, it should be restricted to match the organization's data security plan. This level of access is usually reserved for managers with authority over the business unit.

The application refers to this access level as **Business Unit**.

● **Basic.**

This access level gives a user access to records that the user owns, objects that are shared with the user, and objects that are shared with a team that the user is a member of.

This is the typical level of access for sales and service representatives.

The application refers to this access level as **User**.

○ **None.** No access is allowed.

UIC – Unique Identifier Configuration

UIC - Unique Identifier Configuration

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How to access UIC

Go to **Administration** and tap **Unique Identifier Configurations**

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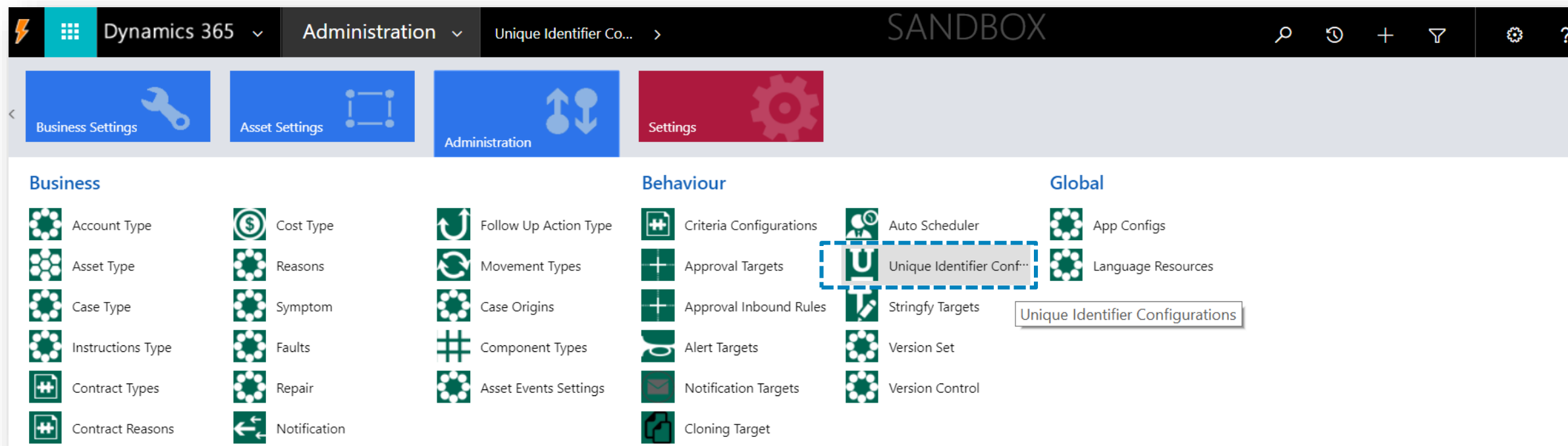
How to access UIC

There it is possible to verify all **Unique Identifier Configurations** already created and its features, such as:

- Sequence Type;
- Prefix;
- Suffix;
- What attribute and entity this setting will affect;
- Current Status Active or Draft

All Unique Identifier Configurations ⌄

Search for records

Name	Sequence Type	Next Number	Increment By	Length	ZeroPad	Prefix	Suffix	Overwrite Origin...	Regarding Attrib...	Regarding Entity	Reset Mode	Status Reason
[Example] Invoice ID s...	View-Based Count	1	1		No			Yes	name	invoice	Off	Active
[Example] Case creati...	Numeric	10	1		No	{ToString(create...		Yes	title	incident	Reset by Minute...	Active
[Example] Account Id...	Guid			10	No			Yes	accountnumber	account	Off	Active

UIC - Unique Identifier Configuration

How to create an UIC

Click on the button **+ NEW** to create a **Unique Identifier Configuration**

UIC – Key Tabs

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UIC

| Key Tabs | Advanced Tabs |

UIC – Tabs Available

To create a New Unique Identidier Configuration there are **five tabs available**

1 GENERAL

2 PLUGIN INFO

3 GENERATOR OPTIONS

4 CRITERIAS

5 RESET OPTIONS

UNIQUE IDENTIFIER CONFIGURATION : INFORMATION ▼

New Unique Identifier Configuration

▸ General

▸ Plugin Info

▸ Generator Options

▸ Criterias

▸ Reset Options
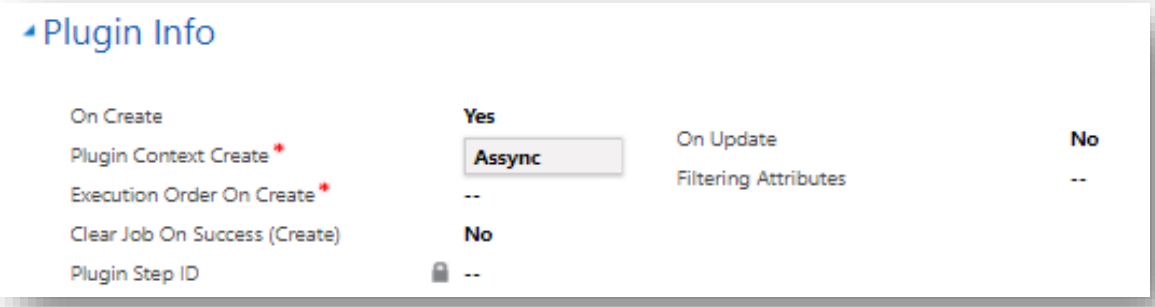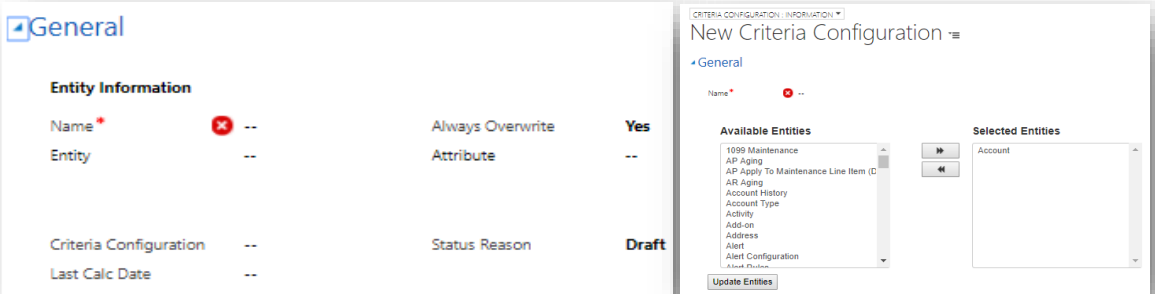
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UIC	
Key Tabs	Advanced Tabs

UIC – Key Tabs

The Key Tabs for the creation of a new UIC are within the tabs: **General, Plugin Info and General Options**

1 ● GENERAL

- **Name**: give a name to the Unique Identifier

- **Entity**: entity within which Unique Identifier will identify records

- **Always overwrite**: Yes/No

- **Attribute**: accordingly to the entity selected choose attributes to be identified

- **Criteria Configuration:** filters the views that will appear in Criteria (existing one or new)

- **Last Calc Date:** date and time of laste calculation

- **Status Reason:** Draft (editing version)/ Active (closed version)

2 ● PLUGIN INFO

- **On Create:** always **yes** and it works as an extending trigger

- **Plugin Context Create:** choice between **Assync** (occurrence of events independently of the main program flow) or **Sync** (abbreviations of synchronization, coordination of events).

- **On Update:** Yes/No. If yes, it sets a new plugin, with plugin context update, execution order and filtering attributes

- **Execution Order On Create:** type a number that will prioritize the flow of steps (value between 1-100)

- **Filtering Attributes:** attributes of the filter

- **Clear Job On Success (Create):** Yes/No. If yes – deletes the system job. If no – no changes

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UIC

Key Tabs | Advanced Tabs

UIC – Key Tabs

3 GENERATOR OPTIONS   The Key Tabs for the creation of a new UIC are within the tabs: **General, Plugin Info and General Options**

- **Sequence Type:**

Fetch XML Count - this tool allows to execute a Fetch request and see the result in XML

Or Numeric

or Guid

In case of choosing **Fetch XML Count** complete the following fields:

- **Lenght:** choose a numerical value between 1-9

- **Increment By:** choose a numerical value

- **ZeroPad:** Yes/No

- **View:** select an existing view or check the chapter UI – View to see how to create a new one.

◢ Generator Options

Generator Information

Sequence Type	**FetchXML Count**		
Length *	❌ --		
Increment By *	--		ZeroPad *	**No**
View			

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UIC

Key Tabs	Advanced Tabs

UIC – Key Tabs

3 **GENERATOR OPTIONS**   The Key Tabs for the creation of a new UIC are within the tabs: **General, Plugin Info and General Options**

- **Sequence Type:**

Fetch XML Count

Or **Numeric**

or Guid

In case of choosing **Numeric** complete the following fields:

- **Lenght:** choose a numerical value between 1-9

- **Increment By:** choose a numerical value

- **ZeroPad:** Yes/No

- **Next Number:** choose a numerical value

- **Numeric Style:** Choose between Base8, Base10 or Base16

◢ Generator Options

Generator Information

Sequence Type	**Numeric**		Next Number *	--
Length *	❌ --			
Increment By *	--		ZeroPad *	**No**
Numeric Style	**Base10**			

UIC

| Key Tabs | Advanced Tabs |

UIC – Key Tabs

The Key Tabs for the creation of a new UIC are within the tabs: **General, Plugin Info and General Options**

3 GENERATOR OPTIONS

- **Sequence Type:**

Fetch XML Count

Or Numeric

or **Guid –** Global Unique Identifier

In case of choosing **Numeric** complete the following fields:

- **Lenght:** choose a numerical value between 1-9

- **Guid Style:** choose between 32 digits or 32 digits separated by hyphens

- **Case:** refers to the case of the letters, choose between Lower or Upper case.
  Length Direction: choose between First X or Last X.

◢ Generator Options

Generator Information

Sequence Type	**Guid**
Length *	❌ --
Guid Style	--
Case	**Lower**

Length Direction	**First X**

UIC – Advanced Tabs

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UIC	
Key Tabs	Advanced Tabs

UIC – Advanced Tabs

After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

1 ● **GENERAL** ✓

2 ● **PLUGIN INFO** ✓

3 ● **GENERATOR OPTIONS** ✓

4 ● **CRITERIAS**

5 ● **RESET OPTIONS**

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Key Tabs	Advanced Tabs

UIC – Advanced Tabs

4 **CRITERIAS** After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

First save the changes made before.

- **Criteria Validation:** Not Matching inverts the criteria's result. Matching Record searches for a defined attribute.

- **Validate Field Change:** Yes (track changes) No (don't track changes)

- **Grouping:** Or / And. E.g. Identify records that match multiple criteria or identify records that match one or another.

Tap the + sign to add a new Criteria.

- **Name:** indicates what the filter is about (usually reflects the view).

- **Type:** Simple (obsolete); Managed (uses a view to query) or Advanced (uses a fetch XML to query).

- **Criteria Configuration:** Choose one already created (in General trab).

- **View:** choose a view option.

- **Context Type:** No Context (executes the view/fetch as it is) or Executing Context (executes the view/fetch in the Regarding Entity) or Dynamic Context (processes a dynamic tag).

- **Context Placeholder**: it is replaced by the regarding entity ID.

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UIC	
Key Tabs	Advanced Tabs

UIC – Advanced Tabs

5 **RESET OPTIONS** After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

Reset Mode: the Unique Identifier Configuration can be set according to a defined time framework within the following options:

- **By Year**
- **By Month**
- **By Weekday**
- **By Day**
- **By Hour**
- **By Minute**
- **By Specific Condition**
- **By Specific Sequence Value**
- **Never Reset**

◄ Reset Options

Reset Options

Reset Mode   **Specific Sequence Value**

UIC

| Key Tabs | Advanced Tabs |

UIC – Advanced Tabs

5 RESET OPTIONS   After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

In case of choice of one of these Reset Options, the rest will be automatically adapt to the chosen one

- **By Year**
- **By Month**
- **By Weekday**
- **By Day**
- **By Hour**
- **By Minute**
- By Specific Condition
- By Specific Sequence Value
- Never Reset

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Key Tabs | Advanced Tabs

UIC – Advanced Tabs

5 **RESET OPTIONS** After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

In case of a Specific Condition, follow this instructions.

- By Year
- By Month
- By Weekday
- By Day
- By Hour
- By Minute
- **By Specific Condition:** Set details by click in **edit** on **Reset Specific Confition** and on **Reset Condition Match**
- By Specific Sequence Value
- Never Reset

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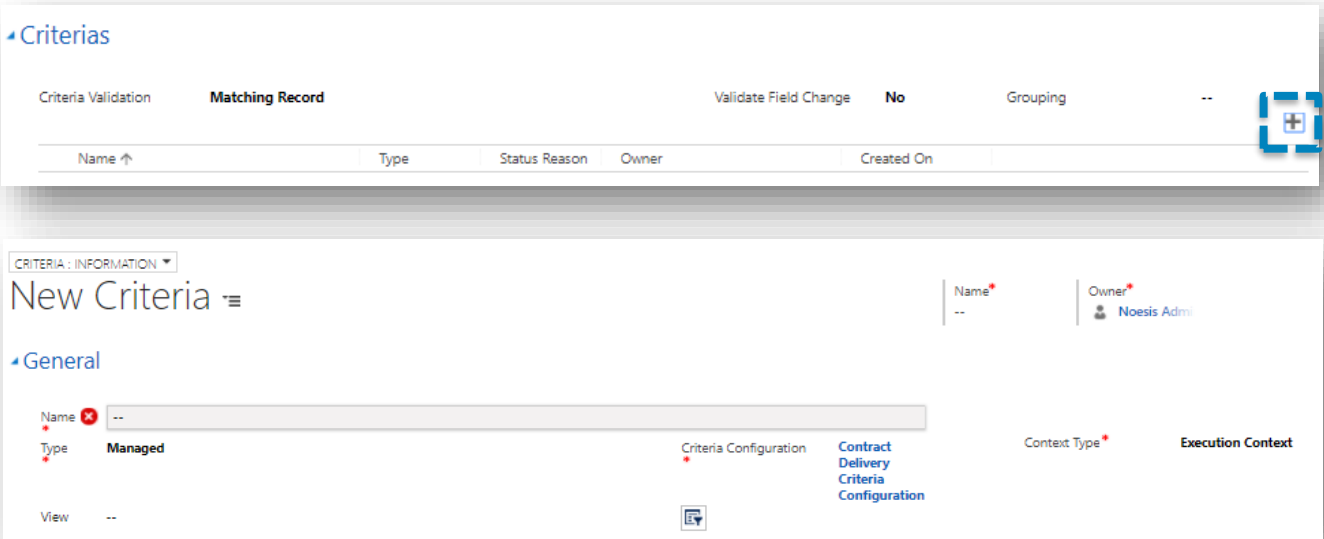
UIC - Key Tabs

UIC – Advanced Tabs

5 ● **RESET OPTIONS**   After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

In case of a Specific Condition, follow this instructions for **Functions**.

- By Year
- By Month
- By Weekday
- By Day
- By Hour
- By Minute
- **By Specific Condition**
- By Specific Sequence Value
- Never Reset

Mailbox From	--	Split To Recipients *	No
Message Subject *	Subject X	Edit	

🔧 Functions ▾	⚡ Dynamic ⊡	⤫ Conditional	⇅ Default	📌 Fixed

🔧 Functions ▾

$ ToCurrency → Converts a value to a chosen currency.

● Count → Counts the number of strings.

● Length → Gives the dynamic expression value's lengh.

A PadString → Adds zeros to the left or right.

A Replace → Replaces an old value for a new value for the dynamic expression.

A ExecuteCriteria → Returns the number of records that a criteria returns.

A FormatString →

T Trim → Takes out spaces at the beginning (Trim Left) or at the end of the dynamic expression (Trim Right).

A ToString → Applies specific format to a string.

T ToSubString → Gives a part of the string.

◉ ToTimeZone → Converts a datetime into a chosen timezone.

🔗 ToUrl → Creates a link for a direct record access.

T ToLower	Sets all letters in lower case.
T ToTitleCase	Sets all words' first letter in upper case.
T ToUpper	Sets all letters in upper case.

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UIC	
Key Tabs	Advanced Tabs

UIC – Advanced Tabs

5 RESET OPTIONS After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

In case of a Specific Condition, follow this instructions for **Dynamic** and **Conditional**

- By Year
- By Month
- By Weekday
- By Day
- By Hour
- By Minute
- **By Specific Condition**
- By Specific Sequence Value
- Never Reset

| Mailbox From | -- | Split To Recipients * | No |
| Message Subject * | Subject X | Edit | |

| Functions ▾ | ⚡ Dynamic ⊡ | ⤬ Conditional | ↻ Default | ✈ Fixed |

| Functions ▾ | ⚡ Dynamic ⊡ |
account | Choose an attribu ▾

Category
Logical Name:
accountcategorycode

Classification
Logical Name:
accountclassificationcode

Account
Logical Name: accountid

→ Allows the definition of an hierarchy of attributes based on a regarding entity.

| Mailbox From | -- | Split To Recipients * | No |
| Message Subject * | Subject X | Edit | |

| Functions ▾ | ⚡ Dynamic ⊡ | ⤬ Conditional | ↻ Default | ✈ Fixed |

| Functions ▾ | ⚡ Dynamic ⊡ | ⤬ Conditional |
{expression:matchValue?trueValue|falseValue}

→ Allows the creation of conditional dynamic expressions. E.g. If the regarding entity is masculine write "caro", if the regarding entity if feminine write "cara".

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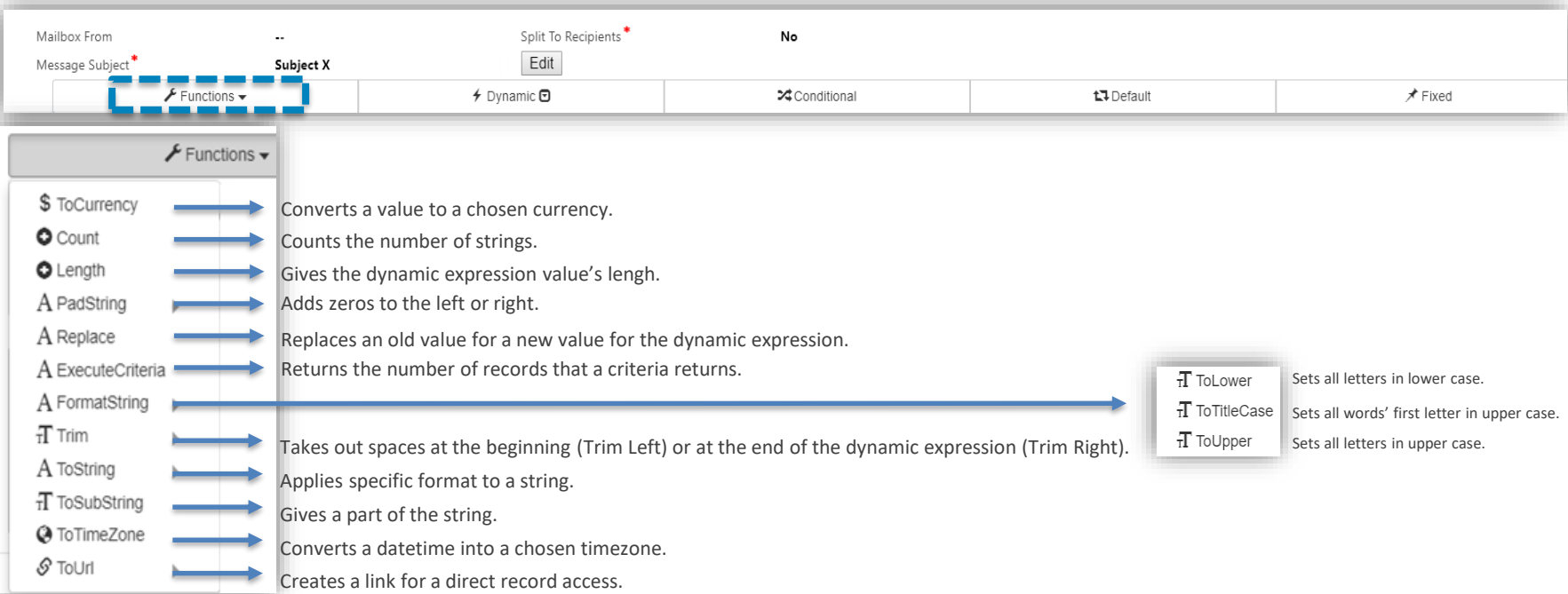**UIC**

Key Tabs | **Advanced Tabs**

UIC – Advanced Tabs

5 RESET OPTIONS   After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

In case of a Specific Condition, follow this instructions for **Default** and **Fixed**

- By Year
- By Month
- By Weekday
- By Day
- By Hour
- By Minute
- **By Specific Condition**
- By Specific Sequence Value
- Never Reset

| Mailbox From | .. | Split To Recipients* | No |
| Message Subject* | **Subject X** | Edit | |

| Functions ▾ | Dynamic | Conditional | Default | Fixed |

Allows the insertion of a value when the dynamic expression is null.

| Mailbox From | .. | Split To Recipients* | No |
| Message Subject* | **Subject X** | Edit | |

| Functions ▾ | Dynamic | Conditional | Default | Fixed |

| Functions ▾ | Dynamic | Conditional |

{expression:matchValue?trueValue|falseValue}

Fixed allows the insertion of a defined fixed value.

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UIC – Advanced Tabs

5 RESET OPTIONS   After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

In case of choice of **Specific Sequence Value** choose a number for the **Start of Sequence**

- By Year
- By Month
- By Weekday
- By Day
- By Hour
- By Minute
- By Specific Condition
- **By Specific Sequence Value**
- Never Reset

◢ Reset Options

Reset Options

Reset Mode   **Specific Sequence Value**

Start of Sequence   2

UIC

Key Tabs | Advanced Tabs

UIC – Advanced Tabs

5 **RESET OPTIONS**   After completing the three main tabs, Advanced Tabs can be found in the following tabs: Criterias and Reset Options.

In case of not wanting a timeframe definition, choose **Never Reset**

- By Year
- By Month
- By Weekday
- By Day
- By Hour
- By Minute
- By Specific Condition
- By Specific Sequence Value
- **Never Reset**

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UI – View

UIC

Key Tabs | Advanced Tabs

Follow these steps to create a Unique Identifier view

● **GENERATOR OPTIONS: View**

Go to Generator Options and choose de Sequence Type **Fetch XML Count.**

In the **View** area, click on the **+ New** icon and add a new one.
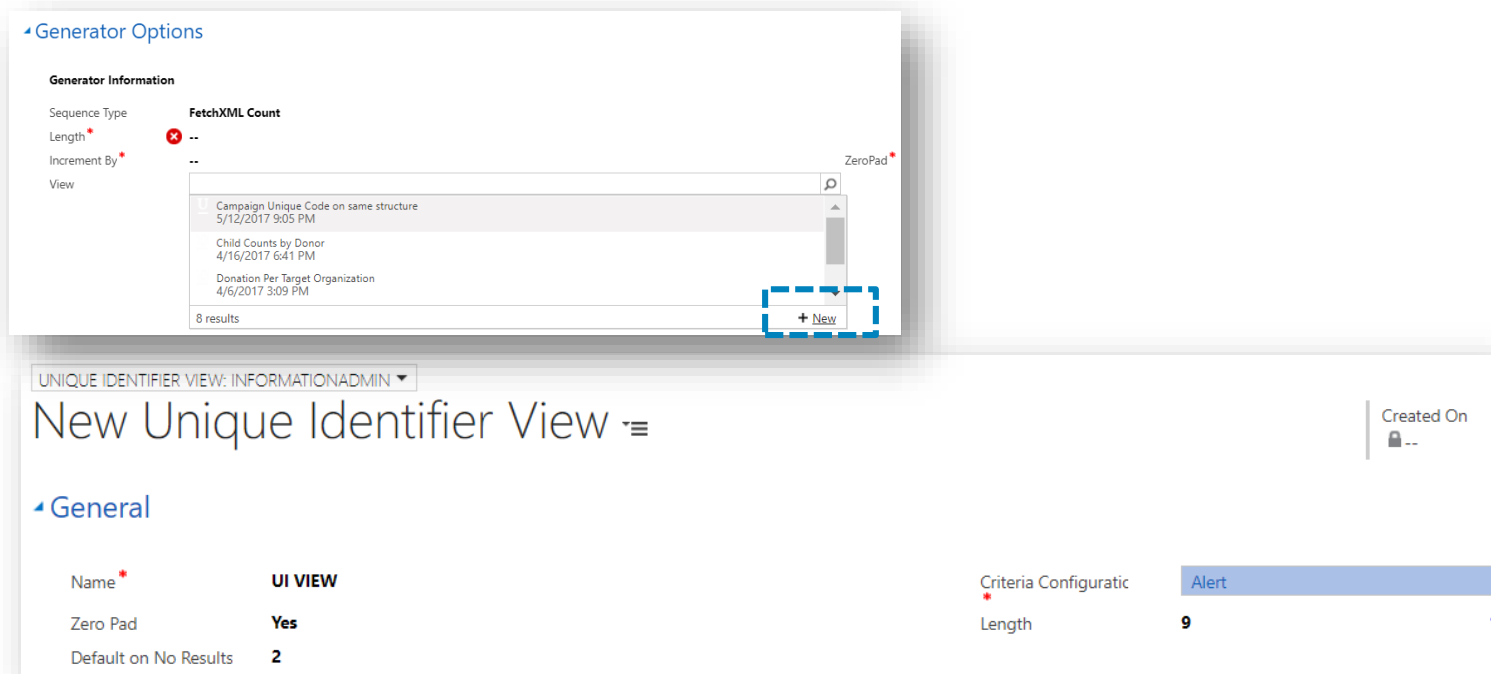
Complete the fields:

Name: text free to choose a name

Zero Pad: Yes/No

Default on No Results: choose a numerical value

Criteria Configuration: choose an existing one or go to General Tab to create a new one

Lenght: choose a numerical value between 1-9

Generator Options

Generator Information

Sequence Type	FetchXML Count
Length *	--
Increment By *	--
View	

ZeroPad *

Campaign Unique Code on same structure
5/12/2017 9:05 PM

Child Counts by Donor
4/16/2017 6:41 PM

Donation Per Target Organization
4/6/2017 3:09 PM

8 results   + New

UNIQUE IDENTIFIER VIEW: INFORMATIONADMIN ▾

New Unique Identifier View

Created On
🔒 --

General

Name *	UI VIEW		Criteria Configuratic *	Alert
Zero Pad	Yes		Length	9
Default on No Results	2			

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Practice

Using 2IDENTIFY- Accounts

Below, you can see in "Account Name" how some of the tests are done.

First we created the configuration, UIC, we wanted and then created the accounts

Using 2IDENTIFY- Invoices

Below, you can see in "Invoice ID" how some of the tests are done.

First we created the configuration, UIC, we wanted and then created the invoices

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