

InRule® for Microsoft Dynamics 365 Deployment Guide



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Document Updated against InRule for Microsoft Dynamics 365 Integration Framework v2.3.11

Document Updated against Microsoft Dynamics 365 v9.0 online, v9.0 on-prem

InRule does not upgrade this document after each Integration Framework release, please see release notes for individual versions if the version that you are using does not match the versions listed above.

If you are working with earlier versions of any of the above products, the information in this document may not apply to you. Please check to see if earlier documentation is available to cover your needs.

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1 Introducing the InRule® for Microsoft Dynamics 365 Integration Framework

InRule provides the *InRule® for Microsoft Dynamics 365 Integration Framework* to enable rule execution integration with Microsoft Dynamics 365. This integration framework serves as a runtime companion to the *irX for Microsoft Dynamics 365* Product.

This guide focuses on the deployment of the Integration Framework to your environment. While there are a number of options available when it comes to how you choose to integrate InRule with Dynamics 365, this guide details the primary deployment path for cloud-based integration with Microsoft Azure.

Before beginning this guide, you may first want to familiarize yourself with the *irX for Microsoft Dynamics 365* product by reading the [irX for Microsoft Dynamics 365 Help Documentation](#).

This document also provides an addendum, [Appendix E: Methods for Executing Rules from Dynamics 365](#) that discusses the different options available to you for running rules beyond what this Deployment Guide covers. It is a good next step for implementers who are looking for advanced options for running rules.

If you are interested in getting rule execution integration working between InRule and Microsoft Dynamics 365 as quickly and easily as possible, this guide is the best place to start!

Additional material is available on the Downloads section of our support website. Please see the [Additional Resources](#) section of this document for support website detail.



InRule® for Microsoft Dynamics® CRM

Enterprise-grade rules for Microsoft Dynamics CRM

? [irX® for Microsoft Dynamics® CRM Help Documentation \(2 MB\)](#)

? [InRule® for Microsoft Dynamics® CRM Integration Framework Deployment Guide \(4 MB\)](#)

📄 [InRule® for Microsoft Dynamics® CRM Integration Framework \(21 MB\)](#)

2 Understanding your options

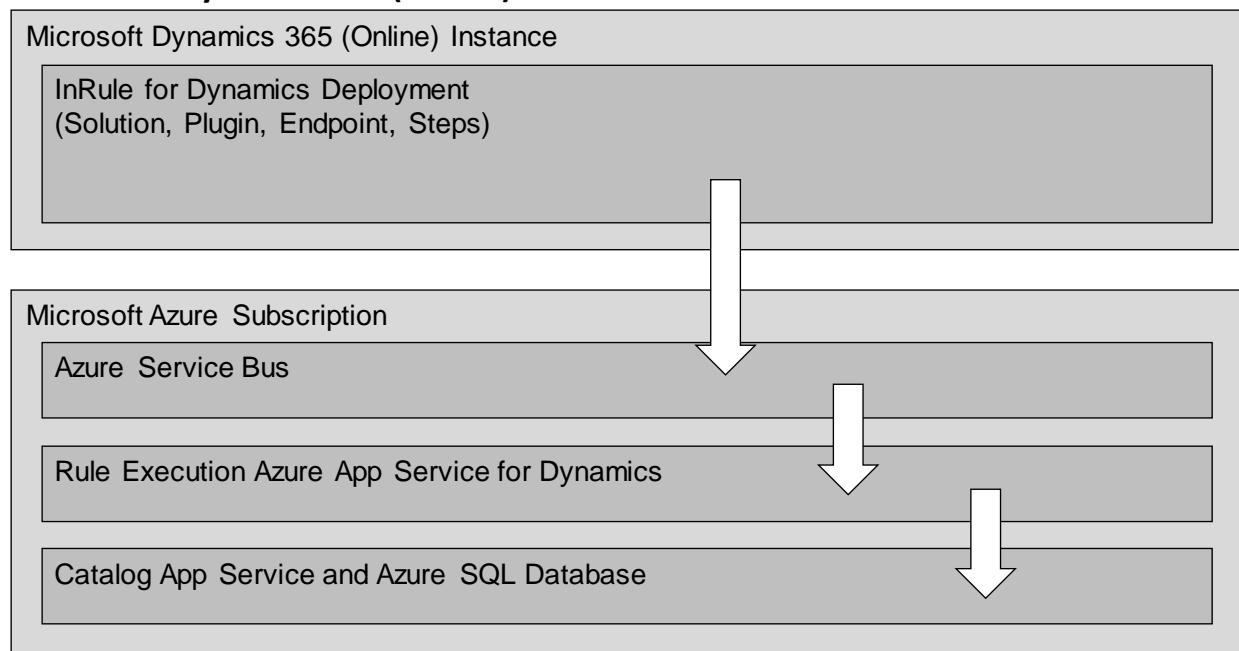
Microsoft Dynamics 365 is available through Microsoft as both an Online SaaS option, and as a downloadable software product that can be installed on either an on-premise environment or through a third party cloud or hosting provider in an IaaS manner with Virtual Machines. When setting up the InRule Integration Framework, ensure that all Azure components and the Dynamics installation are in the same geographical location to reduce timeout exceptions due to network latency.

2.1 Microsoft Dynamics 365 (Online) – PaaS with Microsoft Azure

If you are using Microsoft Dynamics 365 (Online), you will be hosting InRule using a Platform-As-A-Service (PaaS) model on Microsoft Azure. This document discusses the following four components:

1. Catalog App Service and Azure SQL Database
2. Azure Service Bus Relay
3. Rule Execution App Service for Dynamics 365
4. Rule Services Solution for Dynamics 365

Microsoft Dynamics 365 (Online) – PaaS with Microsoft Azure



Section 3 of this document, [Performing the Installation: In Azure](#), provides a complete walkthrough.

[Appendix B: Anatomy of a Request for Execution of Rules Diagram](#) contains a more complete diagram depicting how a standard request navigates through components.

2.2 Microsoft Dynamics 365 (On Premise) – IaaS with IIS

If you are using Microsoft Dynamics 365 (On premise) or plan to deploy to the cloud using an Infrastructure-As-A-Service (IaaS) model, you will be hosting our integration framework via Internet Information Services (IIS) on a Window Server OS. This document discusses the following 3 components:

1. Catalog Web Service and Database
2. Rule Execution Web Service for Dynamics 365 On-Premise
3. Rule Services Solution for Dynamics 365 On-Premise

Section 4 of this document, [Performing the Installation: On-Premise](#), provides a complete walkthrough.

2.3 Other Integration Options

You are welcome to look at alternate integration options. Here are some possible integration options that you may pursue:

- Integration with Microsoft Dynamics 365 (Online) without the use of an Azure Service Bus.
- Integration with Microsoft Dynamics 365 (Online) utilizing IaaS options instead of Azure's PaaS options.
- Integration with Microsoft Dynamics 365 (On premise) against Azure PaaS hosted InRule components. If this is your preferred approach, an on-premise Dynamics installation will work off the shelf with the inRule installation instructions in the [“Performing the Installation: In Azure”](#) section of this document.

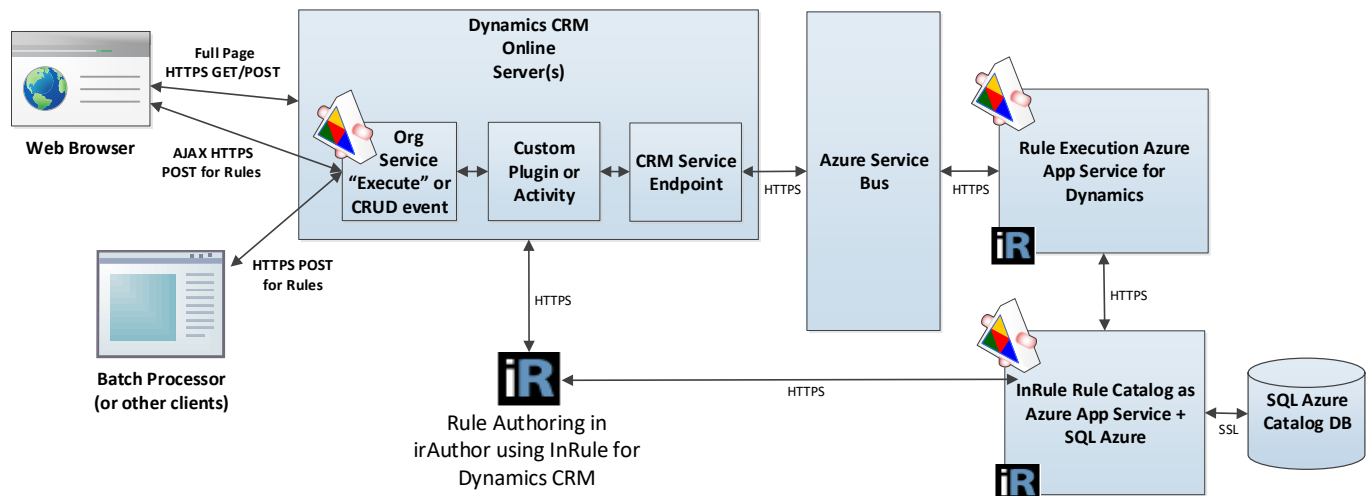
While all of these are possible routes, they will not work with the Integration Framework we provide off the shelf. As such, we strongly encourage that you follow the model outlined in this guide to start with, until you've acquired a more advanced understanding of how all of the pieces of the *InRule® for Microsoft Dynamics 365 Integration Framework* work together to provide a solution.

3 Performing the Installation: In Azure

This section discusses the steps needed to integrate InRule with Microsoft's online version of Microsoft Dynamics 365. Using this scenario InRule components are hosted on Microsoft Azure.

3.1 An overview of the Components needed

This guide will provide the instructions for setting up all of the components below:



Catalog App Service and Azure SQL Database

A Catalog service will be used to store Rule Apps that will be consumed by the Rule Execution App Service. This Catalog Service will be hosted as an Azure App Service. The back end of the Catalog Service utilizes an Azure SQL Database for retrieval and persistence of Rule Applications.

Azure Service Bus Relay

Dynamics 365 is designed to communicate to third party services through an Azure Service Bus. Utilizing an Azure Service Bus is the preferred communication mechanism allowing for security and quick horizontal scaling of services. The *Integration Framework Rule Execution App Service* connects to the Service Bus and registers itself as a Relay listener. When Dynamics 365 makes a request to the Service Bus, the Service Bus relays that message to a listener and allows for two-way communications for as long as the connection is open.

The *Integration Framework Rule Execution App Service* leverages a specific kind of Service Bus called Azure Relay. Within the context of the InRule architecture, the Relay performs the same function as a "traditional" Service Bus, but includes some extra functionality specific to WCF relays. For the sake of consistency with Microsoft's Dynamics documentation, we will refer to the Relay as a Service Bus throughout this document. However, be aware that they are different resource types within Azure itself.

Rule Execution App Service for Dynamics 365

The Rule Execution App Service is responsible for loading Dynamics entity data, executing rules against loaded data, and responding to Dynamics with rule execution results.

Rule Services Solution for Dynamics 365

The Rule Services Solution contains a custom plugin, an endpoint, client resources, a configuration form, and a security role called InRule Integration Administrator. It must be configured to communicate with the Azure Service Bus.

3.2 Gathering prerequisites

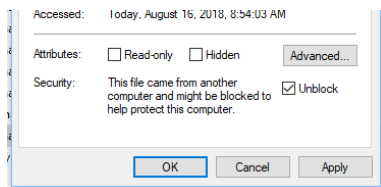
This section reviews what you will want to have prepared before you begin with the integration steps in the next section.

Required Files

The following file should be downloaded from [our support website's downloads section](#) before you begin:

- InRule for Microsoft Dynamics 365 Integration Framework.zip

After you have downloaded this file, but before extracting, make sure that you go to the file properties for the zip and select **Unblock**. If the zip file is not unblocked before extracting, the deployment scripts will not be able to execute successfully.



After unblocking the zip file, extract the contents to a working folder. When you are finished, you should have a directory structure that looks like this:

InRule For Microsoft Dynamics CRM Integration Framework.zip

└─ InRule For Microsoft Dynamics CRM Integration Framework

 readme.txt

 └─ DynamicsDeployment

 Deploy-CrmPackage.ps1

 ...(many other supporting files)

 └─ PkgFolder

 └─ ...(many other supporting files)

 └─ RuleApplications

 DynamicsRules.ruleapp

 └─ RuleExecutionAzureService

 Register-AzureApp.ps1

 azuredeploy.json

 azuredeploy.parameters.json

 InRule.Crm.WebJob.zip

 └─ RuleExecutionOnPremService

 DeployScript.ps1

 InRule.Crm.WebService.deploy-readme.txt

 InRule.Crm.WebService.SetParameters.xml

 ...(many other supporting files)

 └─ RuleHelperDeployment

 └─ InRule.Crm.RuleHelper.dll

 └─ ...(many other supporting files)

Files in **bold** will be used directly in the walkthrough steps below.

Rule Authoring Environment

A Rule Authoring Environment is used to upload a Rule Application to your catalog app service. A Rule Authoring Environment is a machine or virtual machine where irAuthor has been installed with the irX for Microsoft Dynamics 365 extension. If you followed the instructions outlined in [irX for Microsoft Dynamics 365 Help Documentation](#) then you should already have a rule-authoring environment available to you.

We have made it a point to call out the rule authoring environment separately because it is important to be aware of the licensing implications of this step. You will need to utilize an irAuthor license and an irX for Microsoft Dynamics 365 license for the duration of this process. If you're a system administrator who does not intend to perform rule authoring duties after the deployment is up and running, you can either choose to borrow an environment from someone who will use a rule authoring environment, or you will want to be sure to deactivate your license when you're finished with your deployment responsibilities.

Administrative Accounts

Dynamics 365 Organization Service URI: You will want to have the root URL of the organization web service exposed by your Dynamics 365 instance. The server URL is usually in the format of "<https://organization-name.crm.dynamics.com>"

Dynamics Service Account Login and Password: You will want to have a username and account created specifically for use by the InRule for Microsoft Dynamics 365 Framework App Service. This account should have the 'System Administrator' role as it is continually updated with permission to new entities when they are created. Alternatively, this user can have another security role such as the 'InRule Integration Administrator' which is included in the InRule solution. If an alternate role is used, it is important to note that its permissions are not dynamically updated and will have to be done manually. This user account will not be needed if you decide to create an S2S user account outlined in [Section 3.3.2: Registering an Azure Active Directory Application \(Optional\)](#) of this document.

Administrative Password to use for SQL Server: You should decide what username and password you want to use for administrative privileges on the SQL Server. You will use this password when following the referenced catalog setup guide.

*** This walkthrough will utilize the above administrative login and password for the Catalog Service to connect to the SQL Server Database. In a more secure environment, a separate SQL User should be created that only has access to the single database needed by the catalog. It is up to the reader of this document to go this more secure route.*

Administrative Password to use for Catalog Service: You should decide what username and password you want to use for administrative privileges within irCatalog. You will use this password when following the referenced catalog setup guide and will need to provide it when deploying the Execution Service.

*** This walkthrough utilizes the default login of 'admin' and password of 'password'. It will be up to the reader to go through the process of utilizing the Catalog Manager to change these credentials to be more secure.*

Administrative Login and Password for Microsoft Azure: You must have a username and password that will be used to perform administrative tasks within Microsoft Azure.

InRule Azure License File

You will need a special .xml file used for licensing InRule in an Azure cloud environment. This may have been provided with your InRule Welcome package. You can contact support@InRule.com if you have questions about where to get your license file.

Deciding resource names

The following worksheet can be used to decide what to name Azure resources as you go through this Guide.

Many of these resources must have names that are unique in the world; they are hosted on Microsoft Azure and are given domain names that match. We recommend creating a “Base” name that does not exceed 14 characters. We recommend encoding an organization name, an application name, and an environment name into this ‘Base’ name. For Example:

{ApplicationAbbreviation}{OrganizationAbbreviation}{EnvironmentAbbreviation}

MyAppInRuleDev
12345678901234

You can choose to follow this convention or invent your own.

| Resource and Description | Example Name |
|--|---|
| Base Name | MyAppInRuleDev |
| Azure Resource Group Name | MyAppInRuleDevResourceGroup |
| Azure SQL Server Name <i>must be lower case</i> | myappinruledevsqlserver |
| Catalog Database Name | MyAppInRuleDevCatalogDb |
| Catalog App Service Name | MyAppInRuleDevCatalogService |
| Service Bus Namespace | MyAppInRuleDevServiceBus |
| Rule Execution App Service Plan Name | MyAppInRuleDevRuleExecutionAppServicePlan |
| Rule Execution App Service Name | MyAppInRuleDevRuleExecutionAppService |

3.3 Deploying and Configuring Components

3.3.1 Catalog App Service

Installing the Catalog App Service

The first major objective for a Dynamics 365 implementation is the deployment of a Catalog service to Microsoft Azure.

During this process, you will be creating:

- An Azure SQL Server
- An Azure SQL Server Database
- An Azure App Service to host the InRule Catalog in the Azure cloud

When you are finished, you should be able to connect to this app service from a locally installed copy of irAuthor, and successfully save a RuleApp to the catalog.

The full process of installing the Catalog in Microsoft Azure is outlined in the documentation found on the InRule AzureAppServices GitHub, which can be found here:

<https://github.com/InRule/AzureAppServices#ircatalog>

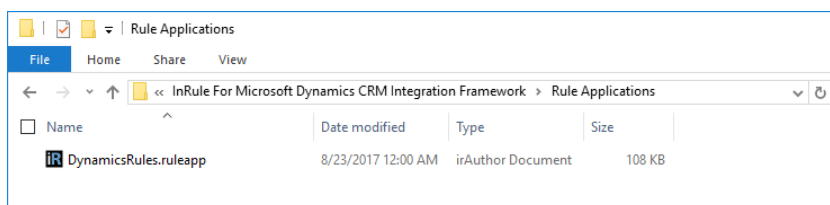
Pleasure ensure you are installing the irCatalog service, not the irServer Rule Execution Service, which is found on the same page and is not compatible with Dynamics 365 integration.

Testing the Catalog App Service by uploading the starter Rule App

At the conclusion of the installation process outlined above you should have a Catalog URI, Username, and Password to use to connect to the catalog service.

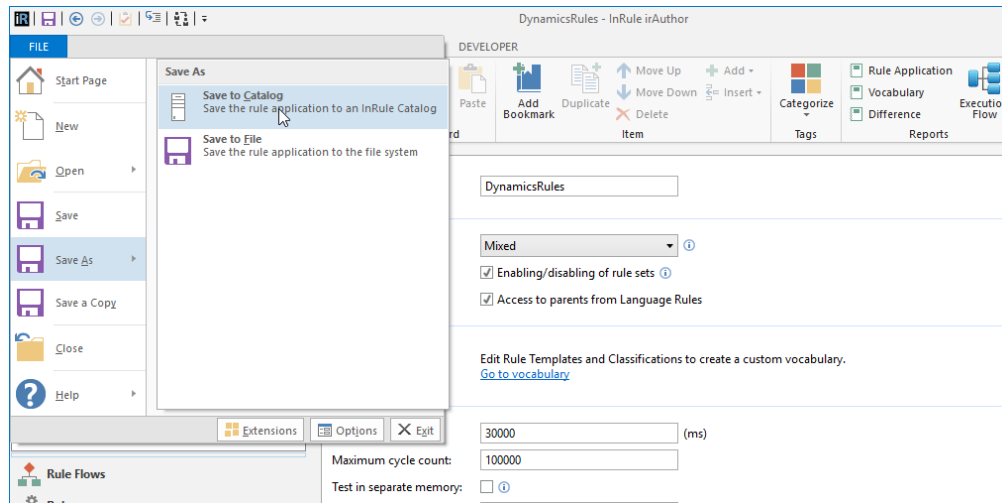
Next we will utilize your rule authoring environment to upload the Rule Application that you extracted into your working directory at:

`\InRule for Microsoft Dynamics 365 Integration Framework\Rule Applications\DynamicsRules.ruleapp`

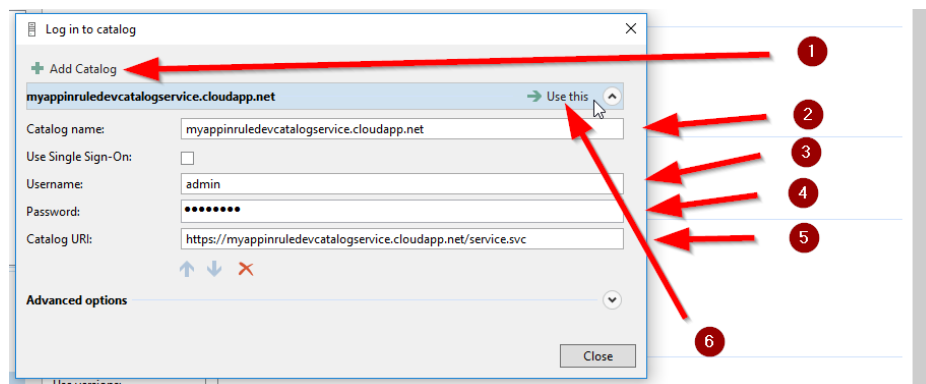


1: Navigate to this file in your rule authoring environment and double click on it, this will open the file with irAuthor.

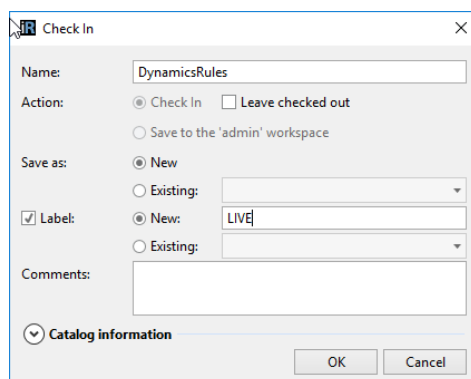
2: Save the Rule Application by choosing File → Save As → Save to Catalog



3: Choose Add Catalog, enter connection information for the Catalog Server that you deployed, and then select Use This.



4: Save with the name DynamicsRules and the Label LIVE



Save the Rule Application to the Catalog using the name of *DynamicsRules*. We must also be sure to label this Rule Application with the text 'LIVE', as configured in the app service configuration. Be sure not to forget this label, it is a small but important step!

At this point, if you can click OK without an error, we have successfully saved the DynamicsRules Rule App to the new Catalog that you have created. We can now continue by creating the Service Bus Namespace.

If you have any trouble getting to this point, it is advised that you resolve any issues with the Catalog before attempting to continue.

3.3.2 Registering an Azure Active Directory Application (Optional)

This section is only necessary if you intend to leverage a server-to-server (S2S) connection between the rule execution service and your Dynamics environment. Server-to-server authentication uses a Dynamics Application User associated to an Azure AD Application for authentication instead of a named user account. This approach can be beneficial as it allows Dynamics integration with InRule without having to purchase an additional full user. Additionally, this will save you from needing to store Dynamics user passwords in Azure. For more information about server-to-server authentication, please refer to the following link: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/build-web-applications-server-server-s2s-authentication>

If you do not want to use server-to-server authentication, you can skip this section and connect with a named user account and Dynamics connection string instead.

Be sure to reference [Appendix J: Known Issues, Limitations and Troubleshooting](#) of this document for considerations regarding the user account and permissions created with this approach.

Registering an Azure AD application is fully automated in the Register-AzureApp.ps1 PowerShell script included in the *RuleExecutionAzureService* folder within the *InRule for Microsoft Dynamics 365 Integration Framework.zip* file downloaded in [Section 3.2: Required Files](#).

This script requires the Azure AD PowerShell module to be installed on the computer before running the script. If this module is not yet installed, you can install it by opening an admin PowerShell window and executing 'Install-Module AzureAD'.

1: Navigate to the \RuleExecutionAzureService directory:

```
PS C:\> cd .\RuleExecutionAzureService\  
PS C:\RuleExecutionAzureService>
```

2: Execute Register-AzureApp.ps1

The script accepts the parameters "Username" and "Password," which need to be credentials for an Azure Active Directory Global Administrator. Alternatively, you can run the script without passing in any credentials, and the script will prompt you with an interactive login.

By default, the application is registered in the primary directory the user account belongs to. If the app needs to be registered in a different Azure Active Directory tenant, you can pass in the tenant ID with the optional "TenantId" parameter.

Without a TenantId passed:

```
PS C:\RuleExecutionAzureService> .\Register-AzureApp.ps1 -Username admin -Password password
```

With an example TenantId passed:

```
PS C:\RuleExecutionAzureService> .\Register-AzureApp.ps1 -Username admin -Password password `>> -TenantId 29d4c658-27b9-4a52-829d-f2dfe1cc7dfe
```

Observe that no errors occur while the application registration script is running.

When finished, the script will output three values: The application name, application ID, and the secret key. Save these 3 values, particularly the secret key, as there will be no way to retrieve this later. The application ID will be needed when deploying the Rule Execution package, and both the Application ID and Key will be needed when deploying the Rule Execution App Service.

```
Application Details for the InRuleDynamicsCrmIntegration application:
=====
Application Name:      InRuleDynamicsCrmIntegration
Application Id:        [REDACTED]
Secret Key:           [REDACTED]
```

3.3.3 Rule Execution App Service for Dynamics 365

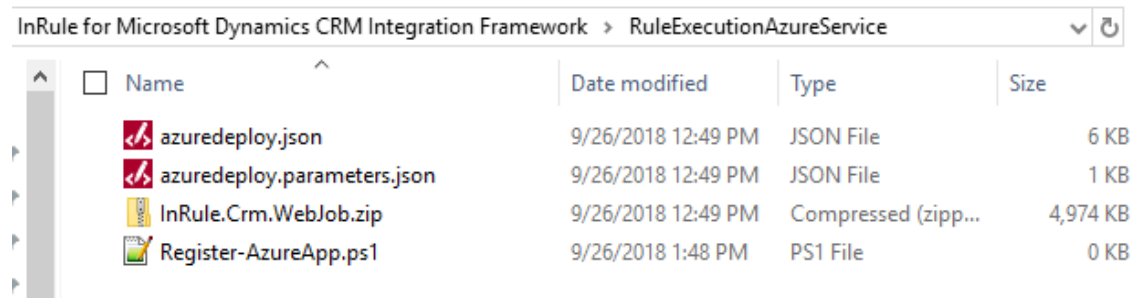



Next, we'll deploy the InRule Rule Execution service as an Azure WebJob running on an App Service, along with all its Azure resource dependencies. To make this process easier, we'll be using an Azure Resource Manager (ARM) template, which allows us to deploy and configure all the Azure resources the Rule Execution Service relies on.

There are a number of methods for deploying an ARM template; this documentation will detail two: via Azure CLI and via PowerShell.

1: Locate azuredeploy.parameters.json

Before deploying the ARM template, we need to define certain parameters.

Locate the *azuredeploy.parameters.json* file in the *RuleExecutionAzureService* folder within the *InRule for Microsoft Dynamics 365 Integration Framework.zip* file downloaded in [Section 3.2: Required Files](#).


| InRule for Microsoft Dynamics CRM Integration Framework > RuleExecutionAzureService | | | | |
|---|---|--------------------|---------------------|----------|
| | Name | Date modified | Type | Size |
| |  azuredeploy.json | 9/26/2018 12:49 PM | JSON File | 6 KB |
| |  azuredeploy.parameters.json | 9/26/2018 12:49 PM | JSON File | 1 KB |
| |  InRule.Crm.WebJob.zip | 9/26/2018 12:49 PM | Compressed (zipp... | 4,974 KB |
| |  Register-AzureApp.ps1 | 9/26/2018 1:48 PM | PS1 File | 0 KB |

2: Update parameters

Open the file with your text editor of choice and edit the parameters listed below

```

1 {
2   "$schema": "https://schema.management.azure.com/schemas/2015-01-01/deploymentParameters.json#",
3   "contentVersion": "1.0.0.0",
4   "parameters": {
5     "appServiceName": {
6       "value": ""
7     },
8     "relayName": {
9       "value": ""
10    },
11    "catalogUri": {
12      "value": "https://{Context}/Service.svc"
13    },
14    "catalogUser": {
15      "value": "admin"
16    },
17    "catalogPassword": {
18      "value": "password"
19    },
20    "orgUrl": {
21      "value": ""
22    },
23    "appId": {
24      "value": ""
25    },
26    "appSecret": {
27      "value": ""
28    },
29    "crmConnectionString": {
30      "value": ""
31    }
32  }
33 }
```

| | |
|--|--|
| 1 appServiceName | <p>Provide a name for the Azure App Service that the Rule Execution Service will run on.</p> <p>Note, by default, an App Service Plan will be created by the ARM template. The App Service Plan will follow the naming convention of the App Service name you provide here, with "Plan" appended to the end (ex. appServiceNamePlan). If you wish to deploy your app service to an already existing App Service Plan rather than create a new one, or for more information on the necessary configurations for the App Service Plan, reference Appendix G: Azure App Service Plan Configuration</p> |
| 2 relayName | Provide a name for the Azure WCF Relay (aka Azure Service Bus). This is NOT the desired namespace URL for the Relay, it should be the desired name of the actual Azure resource. |
| 3 catalogUri | <p>The URI for the Catalog Service that will be used</p> <p>Example: https://myappinruledevcatalogservice.cloudapp.net/service.svc </p> |
| 4 catalogUser | Username for Catalog Service, default value is 'admin'. |
| 5 catalogPassword | Password for Catalog Service, default is 'password', please change this using the catalog manager! |
| 6 orgUrl (If using named user account authentication instead of S2S authentication, leave blank) | <p>The root URL for the Dynamics 365 instance.</p> <p>Follows this format: https://organization-name.crm.dynamics.com</p> <p>If using named user account authentication instead of S2S authentication, leave this blank. The Dynamics Org URL will be defined as a part of the crmConnectionString parameter instead.</p> |
| 7 appId (If using named user account authentication instead of S2S authentication, leave blank) | ID for the Azure Active Directory application registered in Registering an Azure Active Directory Application . If using connection string instead of S2S authentication, provide a value for the crmConnectionString parameter instead |
| 8 appSecret (If using named user account authentication instead of S2S authentication, leave blank) | Key secret for the Azure AD app registered in Registering an Azure Active Directory Application . If using named user account authentication instead of S2S authentication, provide a value for the crmConnectionString parameter instead |
| 9 crmConnectionString (If using S2S authentication, leave blank) | <p>Provide a Dynamics connection string if you are not using S2S authentication, otherwise leave blank. Information on connection string formatting can be found here: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/xrm-tooling/use-connection-strings-xrm-tooling-connect</p> <p>The account used here should have the 'System Administrator' role or the 'InRule Integration Administrator' role. It is important to note that the 'InRule Integration Administrator' role is not updated when new entities are created. Reference Appendix J: Known Issues, Limitations and Troubleshooting for more information.</p> <p> Important: Some customers have reported needing to provide a username in the format "domain\username" in order to successfully connect using IFD.</p> |

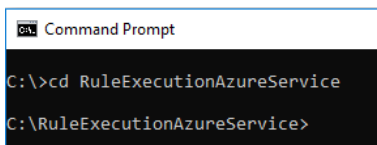
3: Option 1: Deploy ARM Template with Azure CLI

Now that the ARM template is configured, we'll deploy it to get the resources up and running. The following will detail how to use the Azure CLI to deploy the ARM template (Note, this section assumes Azure CLI has already been installed):

3.1 Run Command Prompt or Powershell



3.2 Navigate to the RuleExecutionAzureService folder

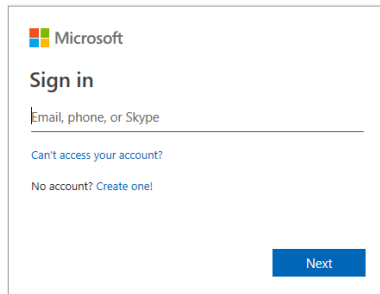


3.3 Enter "az login" to login into Azure

```
Command Prompt

C:\>cd RuleExecutionAzureService
C:\RuleExecutionAzureService>az login
```

3.4 Enter your Azure admin credentials to login when prompted in the new browser window opened



3.5 Select the appropriate subscription

If your Azure account has access to multiple subscriptions, you will need to set your active subscription to where you create your Azure resources:

```
C:\RuleExecutionAzureService>az account set --subscription SUBSCRIPTION_NAME
```

3.6 Create Resource group

If you have not created a resource group yet, you will need to create one. You will need to define a name and a geographic location for where to host the resource. This example uses Central US:

```
C:\RuleExecutionAzureService>az group create --name ResourceGroupName --location centralus
```

3.7 Execute the following command to deploy the ARM template

Replace "ResourceGroupName" with the name of the Azure Resource Group you want to deploy to

```
C:\RuleExecutionAzureService>az group deployment create -g ResourceGroupName
--template-file .\azuredploy.json --parameters .\azuredploy.parameters.json
--query properties.outputs.relayKey.value -o table
```

Observe that the template deploys with no errors

If the template deploys successfully, you will see a result that looks similar to this:

```
Result
-----
kwSQxK+ [REDACTED]
```


The value that is output is your Azure Service Bus key, which is a value you will need to configure your Dynamics instance in a later step.

4: Option 2: Deploy ARM Template with Powershell


(If you have already deployed the ARM template via Azure CLI in the section above, this section is not necessary)

Now that the ARM template is configured, we'll deploy it to get the resources up and running. The following will detail how to use Powershell to deploy the ARM template (Note, this section assumes Azure PowerShell has already been installed):

1.1 Run Powershell

 Windows PowerShell

1.2 Navigate to the RuleExecutionAzureService folder

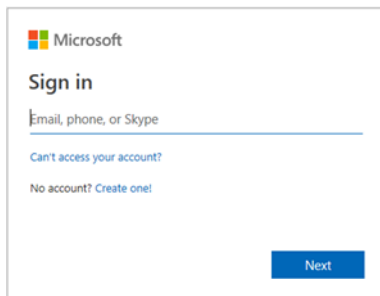
 Windows PowerShell

```
PS C:\> cd .\RuleExecutionAzureService\  
PS C:\RuleExecutionAzureService>
```

1.3 Enter “Connect-AzureRmAccount” to login into Azure

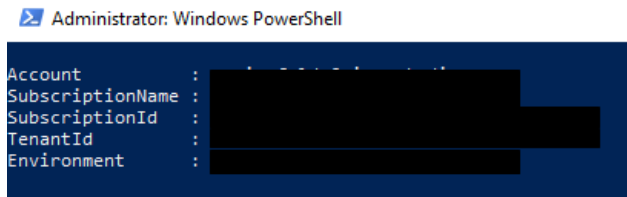
```
PS C:\RuleExecutionAzureService> Connect-AzureRmAccount
```

1.4 Enter your Azure admin credentials to login when prompted in the new browser window opened



1.5 Select the appropriate subscription

Upon logging in, your default subscription information will be displayed:

Administrator: Windows PowerShell

```
Account      : [REDACTED]  
SubscriptionName : [REDACTED]  
SubscriptionId  : [REDACTED]  
TenantId      : [REDACTED]  
Environment    : [REDACTED]
```

If this is not the subscription you want to deploy to, you can use the “Select-AzureRmSubscription” cmdlet to change the targeted subscription. Just replace “SubscriptionNameHere” with the name of the desired subscription:

Windows PowerShell

```
PS C:\RuleExecutionAzureService> Select-AzureRmSubscription -SubscriptionName SubscriptionNameHere
```

4.6 Create Resource Group

If you have not created a resource group yet, you will need to create one. You will need to define a name and a geographic location for where to host the resource. This example uses Central US:

```
PS C:\RuleExecutionAzureService> New-AzureRmResourceGroup -Name ResourceGroupName -Location centralus
```

4.7 Execute the following command to deploy the ARM template

Replace “ResourceGroupName” with the name of the Azure Resource Group you want to deploy to

Windows PowerShell

```
PS C:\RuleExecutionAzureService> New-AzureRmResourceGroupDeployment -ResourceGroupName ResourceGroupName `
>> -TemplateFile .\azuredeploy.json -TemplateParameterFile .\azuredeploy.parameters.json
```

Observe that the template deploys with no errors

If the deployment is successful, you should see an output similar to this:

```
DeploymentName      : azuredeploy
ResourceGroupName  : 
ProvisioningState   : Succeeded
Timestamp          : 9/27/2018 7:45:26 PM
Mode               : Incremental
TemplateLink       : 
Parameters
  Name      Type      Value
  -----
  relayKey   String    [REDACTED]

Outputs
  Name      Type      Value
  -----
  relayKey   String    [REDACTED]
```

Note the value of “relayKey” underneath the “Outputs” heading. This value is your Azure Service Bus key, and will be needed when configuring your Dynamics instance in later steps.

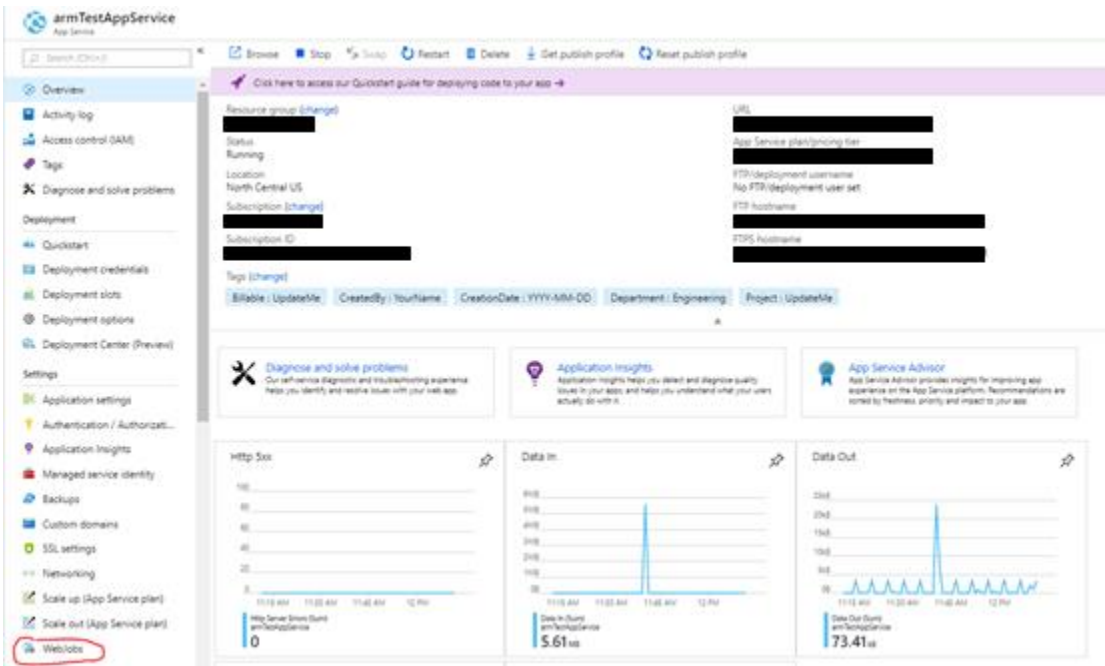
5: Verify Setup

Navigate to the Azure portal and locate the deployed App Service

1 of 2 items selected ☐ Show hidden types

| | NAME | TYPE |
|-------------------------------------|-------------------|-------------|
| <input checked="" type="checkbox"/> | armTestAppService | App Service |

Click on the app service, and on the nav-bar that appears to the left of the resource overview, select WebJobs



Ensure the InRule.Crm.WebJob is present and its “Status” is set to “Running”



WebJobs

WebJobs provide an easy way to run scripts or programs as background processes in the context of your app.

| NAME | TYPE | STATUS | SCHEDULE |
|-------------------|------------|---------|----------|
| InRule.Crm.WebJob | Continuous | Running | n/a |

3.3.4 Upload License file

Regardless of how you choose to deploy the ARM template, you'll need to upload a license file to the web app service in order for both the catalog service and the rule execution app service to properly function. The simplest way to upload the license file is via FTP.

This example leverages Azure CLI in addition to Powershell commands. If you intend to use this method, please run the CLI from Powershell.

Alternative approaches using Powershell only should be possible if desired but are not detailed in this document.

First, retrieve the FTP deployment profile (url and credentials) with the [az webapp deployment list-publishing-profiles](#) command and put the values into a variable:

```
# Example: az webapp deployment list-publishing-profiles --name contoso-execution-  
prod-wa --resource-group inrule-prod-rg --query "[?contains(publishMethod,  
'FTP')].{publishUrl:publishUrl,userName:userName,userPWD:userPWD}[0]" | ConvertFrom-  
Json -OutVariable creds | Out-Null
```

```
az webapp deployment list-publishing-profiles --name WEB_APP_NAME --resource-group  
RESOURCE_GROUP_NAME --query "[?contains(publishMethod,  
'FTP')].{publishUrl:publishUrl,userName:userName,userPWD:userPWD}[0]" | ConvertFrom-  
Json -OutVariable creds | Out-Null
```

Then, upload the license file using those retrieved values:

```
# Example:  
$client = New-Object System.Net.WebClient;$client.Credentials = New-Object  
System.Net.NetworkCredential($creds.userName,$creds.userPWD);$uri = New-Object  
System.Uri($creds.publishUrl + "/InRuleLicense.xml");$client.UploadFile($uri,  
"$pwd\InRuleLicense.xml");  
  
$client = New-Object System.Net.WebClient;$client.Credentials = New-Object  
System.Net.NetworkCredential($creds.userName,$creds.userPWD);$uri = New-Object  
System.Uri($creds.publishUrl + "/InRuleLicense.xml");$client.UploadFile($uri,  
"LICENSE_FILE_ABSOLUTE_PATH")
```

3.3.5 Rule Services Solution for Dynamics 365

At this point, all of the Azure Requirements are met. The Azure Service bus should be listening for incoming communication from Dynamics. We must now setup Dynamics, which can be done in one of two ways:

1. **AppSource Deployment** -- You can install the Rule Services Solution through Microsoft AppSource. The InRule AppSource listing can be found by going to [AppSource](#) and searching for InRule. Proceed to Step 4 in the following instructions after installing from AppSource.
2. **PowerShell Deployment** -- You can follow the guide below to deploy the Dynamics package via PowerShell script.



Important: You only need to deploy the Rule Services Solution by **one** of the two above methods. Doing both is unnecessary.



Important: Only deploy the solution using one of the two above methods. Do not manually import included solution files.

1: Navigate to the ‘\DynamicsDeployment’ directory:

```
Administrator: Windows PowerShell
PS C:\> cd .\DynamicsDeployment\
PS C:\DynamicsDeployment>
```

2: Execute Deploy-CrmPackage.ps1

Deploy-CrmPackage.ps1

```
PS C:\> .\Deploy-CrmPackage.ps1
```

If you are using S2S authentication in the execution service, you will need to pass in your Azure Active Directory application ID as the “AzureAppId” parameter to the Deploy-CrmPackage.ps1 script. This is the application ID that was output in [Section 3.3.2](#), and will be used to create a new Application User in Dynamics. If you were not involved in registering your Azure Active Directory application, your Azure administrator should be able to provide you with this ID. If you are using connection-string based authentication in the execution service, you do not need to provide this parameter.

```
PS C:\DynamicsDeployment> .\Deploy-CrmPackage.ps1 -AzureAppId <app ID here>
```

Additionally, the script supports 2 other parameters: “SbNamespaceAddress” and “SasKey”. These parameters allow you to pass in the **fully qualified** Service Bus Namespace Address (e.g.: `https://<<ServiceBusNamespace>>.servicebus.windows.net/<<SB Relay Path>>`) and Service Bus Key for the Service Bus your Rule Execution App Service is listening on and will allow the script to auto-configure your Dynamics instance to point at that Service Bus. These parameters operate independently of the “AzureAppId” parameter; they may be alongside it or on their own. However, if you opt to provide a value for either “SbNamespaceAddress” or “SasKey,” you must provide a value for the other as well.

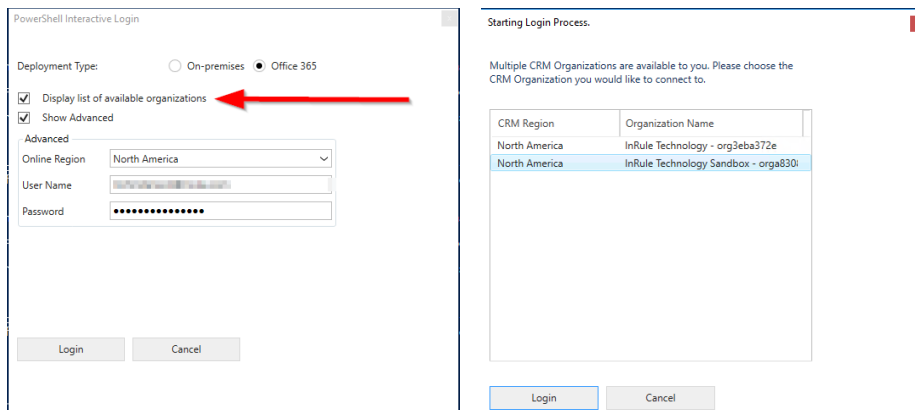
```
PS C:\DynamicsDeployment> .\Deploy-CrmPackage.ps1 -SbNamespaceAddress <service bus name here>
-SasKey <service bus key here>
```

If you choose not to provide the “SbNamespaceAddress” and “SasKey” parameters, you will receive a notification (shown below) after the script finishes executing reminding you that you need to manually configure the SAS Namespace and SAS Key as outlined in [Step 4](#) of this section.

The SAS Key needs to be set in the Rule Execution Service Endpoint Configuration in order to run rules

3: Provide Dynamics 365 Service Credentials

By default, the script will display an interactive login window to connect to Dynamics. Please be sure to check the ‘Display list of available organizations’ to make sure that you select the correct instance of Dynamics to install to!



Alternatively, the Deploy-CrmPackage.ps1 script also accepts a Dynamics Connection String:

.\Deploy-CrmPackage.ps1

```
-CrmConnectionString 'AuthType=Office365;Url=https://irroadsandbox.crm.dynamics.com/;Username=CRM_USERNAME@irroadsandbox.com;Password=PASSWORD'
```

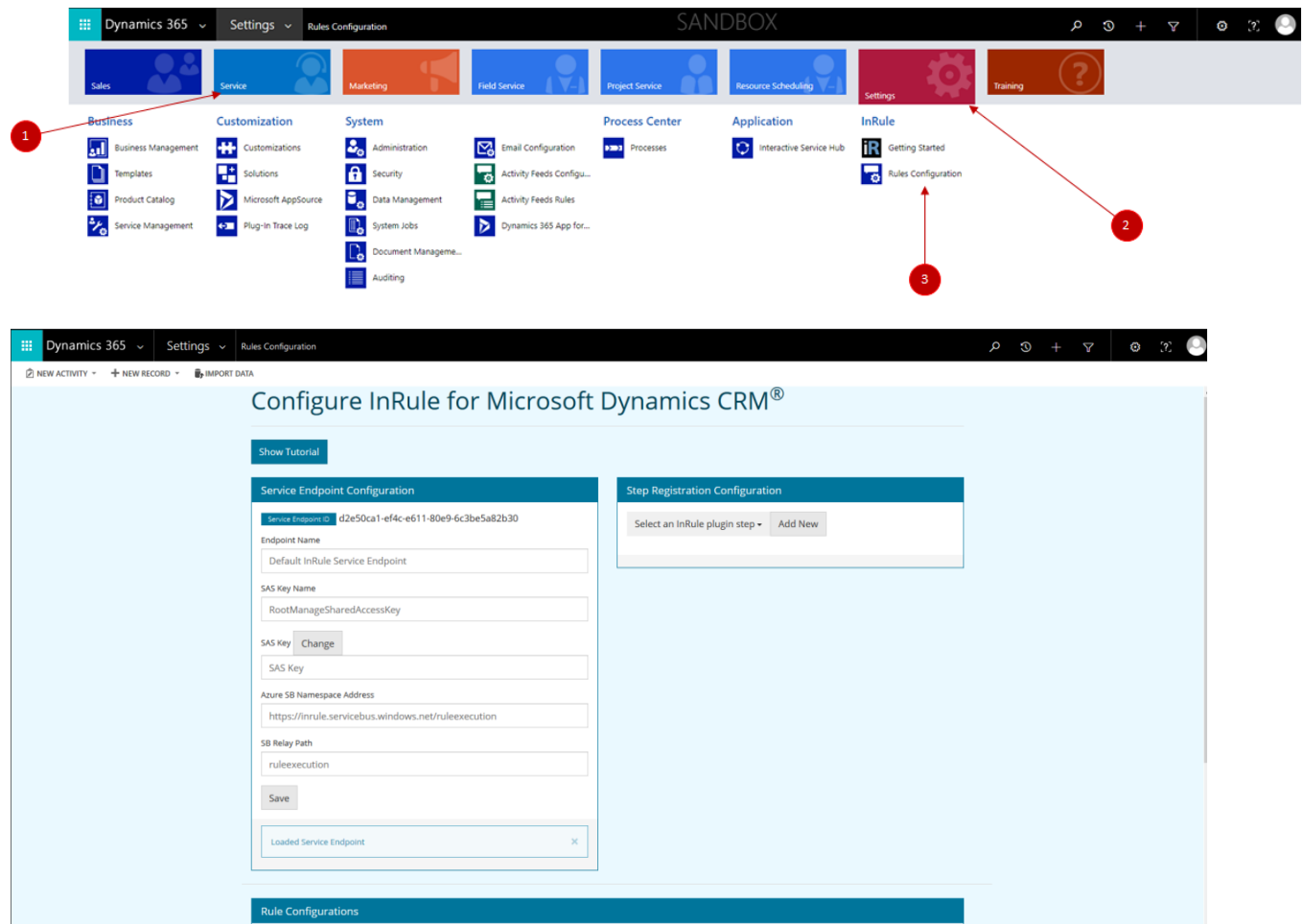
```
.\Deploy-CrmPackage.ps1 -CrmConnectionString
'AuthType=Office365;Url=https://{DYNAMICSURL}.crm.dynamics.com/;Username={DYNAMICSUSERNAME};Pa
ssword={DYNAMICSPASSWORD}'
```

Observe that no errors occur while the Deploy Script is running.

4: Configure the Rule Services Solution in Dynamics

Next, we need to configure the Dynamics Solution that has been deployed to point to the Rule Execution Service that is already available on Azure. We will need to have the Service Bus Namespace and the Service Bus Key (SAS Key) ready for this step. You can find more information about these settings in the [Rule Execution App Service for Dynamics 365](#) section.

Navigate to the Rules Configuration page:



You will need to define values in the following fields.

| Configuration Form Fields | Details on these settings are found in " Rule Execution App Service for Dynamics 365 " section. |
|---------------------------|--|
| Endpoint Name | For basic configuration, this can be left as is. |
| SAS Key Name | The key output by the ARM template is the 'RootManageSharedAccessKey' key, so this value can be left as the default in most scenarios. |
| SAS Key | This is the key secret value, and is output by the ARM template after completion of the deployment Note: If you provided the "SasKey" parameter in Step 2 of this section, this value will already be set. |

| | |
|----------------------------|---|
| Azure SB Namespace Address | <p>Change the service bus namespace here, as the default value of 'inrule-crmonline' will not work for you. The service bus namespace is the same value provided for the relay name in the ARM template parameters file.</p> <p>Using the Service Bus Namespace and the Service Bus Path, construct the address as follows: https://<<ServiceBusNamespace>>.servicebus.windows.net/<<SB Relay Path>></p> <p>Note: If you provided the “SasName” parameter in Step 2 of this section, this value will already be set.</p> |
| SB Relay Path | Unless you have changed the corresponding setting in rule execution app service, this value can be left as the default, which is 'ruleexecution' |

The following screenshots show the Service Endpoint Configuration screen before and after configuration.

- [#1 in screenshot] SAS Key Name
- [#3 in screenshot] SAS Key
- [#4 in screenshot] Azure SB Namespace Address
- [#5 in screenshot] SB Relay Path

Please note that you must click on 'SET' [#2 in screenshot] before the SAS Key can be entered.

For a more complete description of all of the configuration options available, reference [Appendix F: Rules Configuration and Settings](#)

Notice: If you are using the standard Azure US environment 'AzureCloud', then the provided domain suffix will work fine. However, if you are using an alternate Azure Environment such as US Government or an international environment – be sure to update the suffix to the appropriate value for your region.

Be sure to click save, and to observe the “Saved Changes” notice:

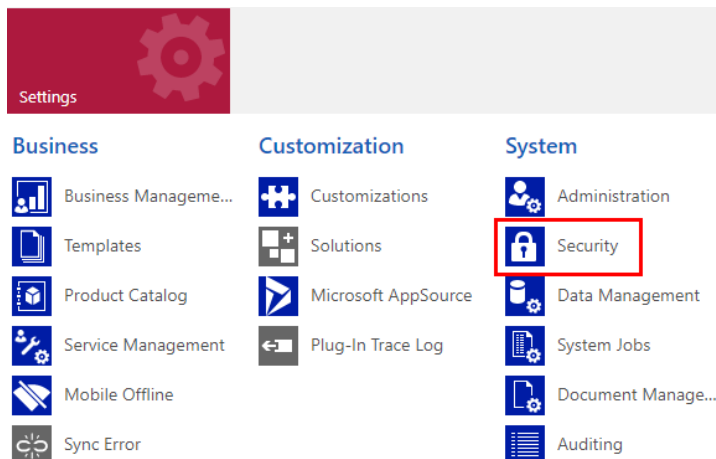
5: Manually Configuring S2S Authentication for AppSource Deployments

When deploying the solution via AppSource, the creation of the Application User that is used by S2S Authentication between the Rule Execution Service and the Dynamics Rule Services Solution must be manually configured if desired. S2S Authentication is for single tenant AzureAD applications only.



Important: These steps are only necessary for users that have deployed via AppSource and want to leverage S2S authentication with a single tenant Azure AD application.

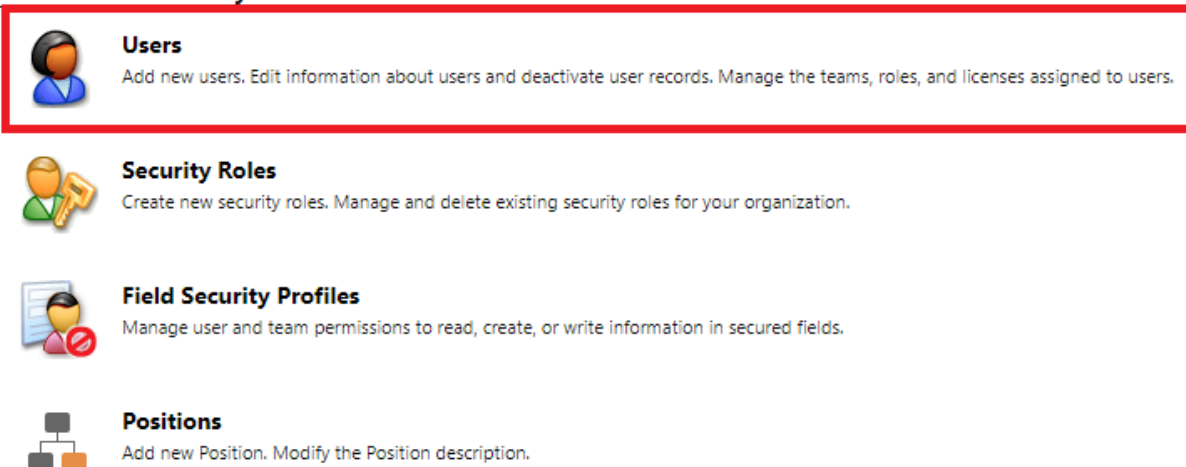
5.1: Navigate to Settings > Security:



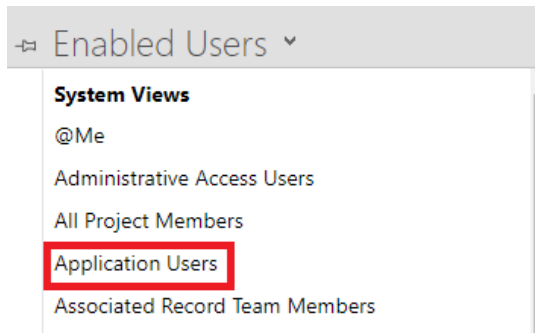
5.2: Select Users:

Security

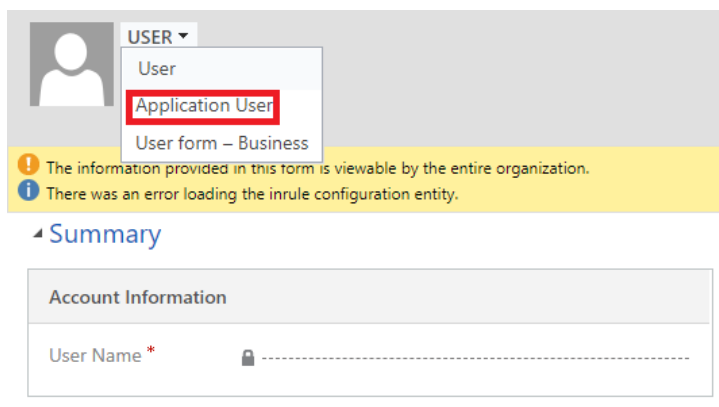
Which feature would you like to work with?



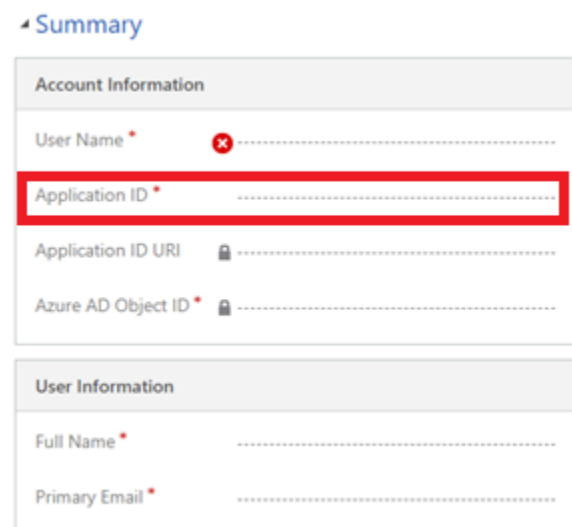
5.3: Toggle to the Application Users View:



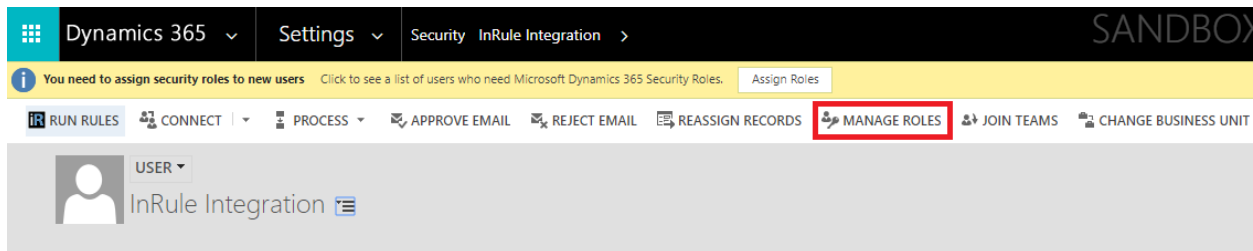
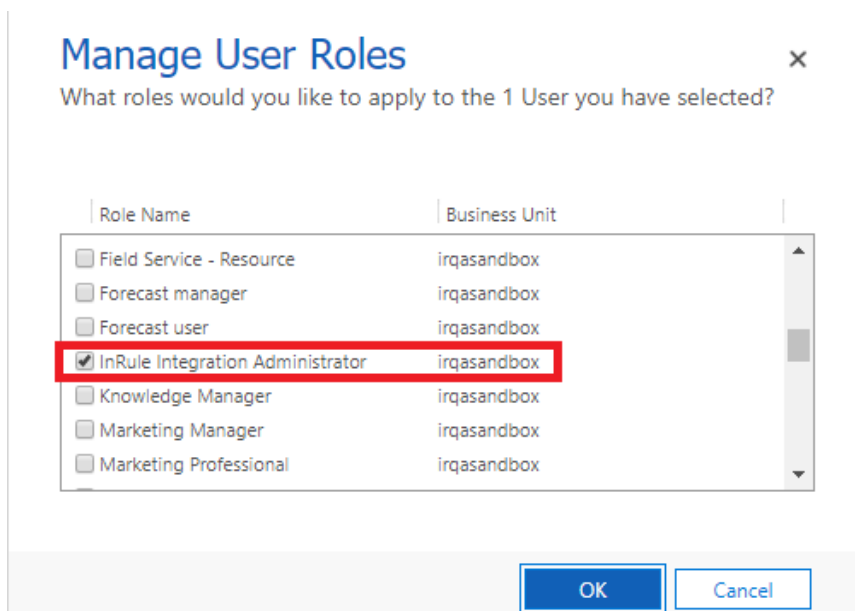
5.3: Select New, and Toggle to Application User



5.4: Populate the Application ID based on the configured S2S Application (as outlined in section 3.3.2)



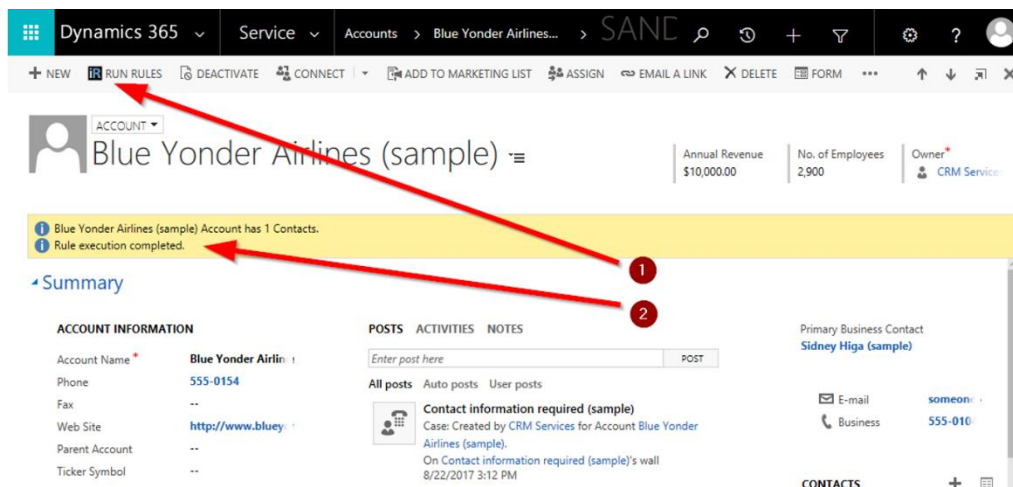
5.5: Populate the Username, Full Name and Primary Email with NEW account info for what the App User should be called

5.6: Click “Save”**5.7: Click “Manage Roles” in the top menu bar****5.8: Tick the box for "InRule Integration Administrator" role and click OK**

6: Verify a successful deployment!

A 'Run Rules' button will now exist on the edit form of all Dynamics entities. The way this button behaves will depend on the settings that have been configured under the Rule Configuration section; this document assumes the default configuration behavior. To understand what settings are available and what they mean, please see [Appendix F: Rules Configuration and Settings](#) of this document.

Open up an Account and execute 'Run Rules'. The default deployment is configured to run a Rule App from the catalog named DynamicsRules, which is what we uploaded to the catalog in the Verify Catalog stage. If everything has been set up correctly, you should see the "Rule Execution Completed" message and the description of the account will be updated to provide the date and time.



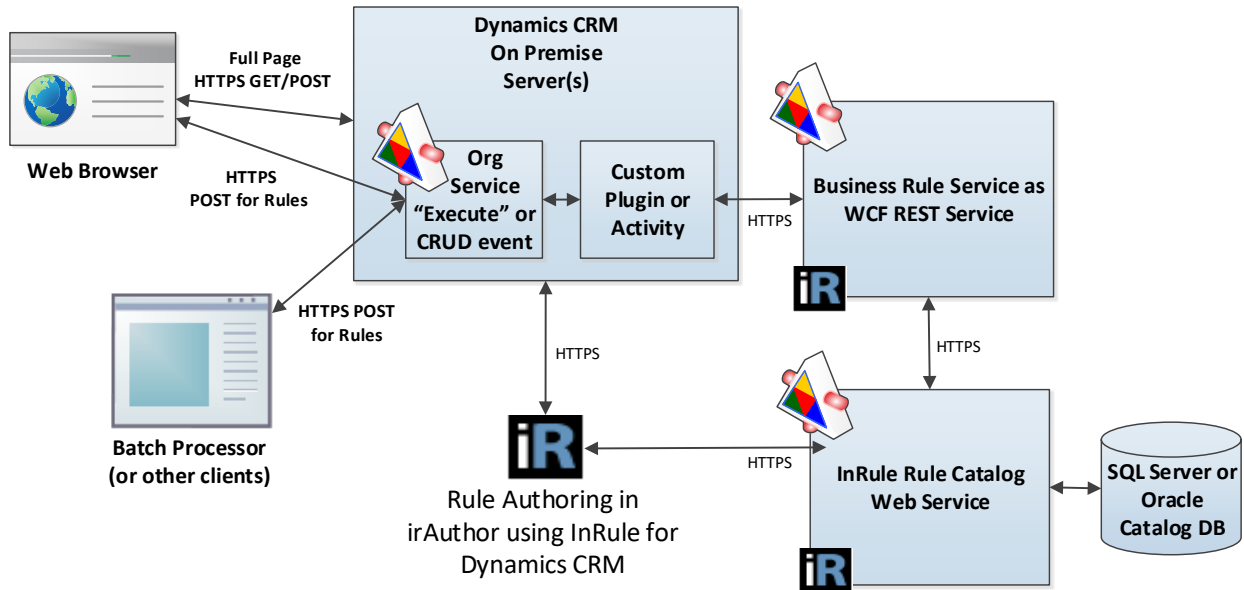
If there are any issues with executing rules and you are using an S2S user account from section 3.3.2, check [Appendix J: Known Issues, Limitations and Troubleshooting](#) of this document. If you are using the connection string, make sure the user account specified has the necessary privileges to access the particular entity. In most applications, the user account used in the connection string has the role of 'System Administrator'. This security role is automatically updated with permission when new entities are created. If the user account has the role 'InRule Integration Administrator,' it is important to note that the permissions of the role are only updated when the InRule solution is deployed. Adding permission for new entities will have to be done manually.

4 Performing the Installation: On-Premise

This section discusses the steps needed to integrate InRule with Microsoft's on-premise version of Microsoft Dynamics.

This section assumes that you already have an IIS web server and an on-premise version of Dynamics deployed and configured.

4.1 An overview of the Components needed



Catalog Web Service and Database

A Catalog service will be used to store Rule Apps that will be consumed by the Rule Execution Service. This Catalog Service will be hosted as a web service on an IIS server. The back end of the Catalog Service utilizes a SQL Server or Oracle database for retrieval and persistence of Rule Applications. The Installation Documentation and InRule Installer, which will be used to install the service itself, are available on [our support website's downloads section](#) provides instructions for setting up the catalog.

Rule Execution Web Service for Dynamics 365 On-Premise

The WCF Web Service implementation is designed to be generically applied to any given Dynamics Entity and corresponding InRule rules that may apply to that Entity. After the web service is published, the service can be directed to run various Rule Applications against different Entity types by passing arguments in the REST calls. This will require a separate deployment than the Catalog Web Service; this process will be covered in the ["Deploy the Rule Execution Web Service"](#) section.

Rule Services Solution for Dynamics 365 On-Premise

The RuleExecutionServices solution contains a custom plugin, client resources, and a configuration form. Unlike the Online solution, this is configured to work directly against the execution service, rather than requiring the "middle-man" of the Azure Service Bus.

4.2 Gathering prerequisites

This section reviews what you will want to have prepared before you begin with the integration steps in the next section.

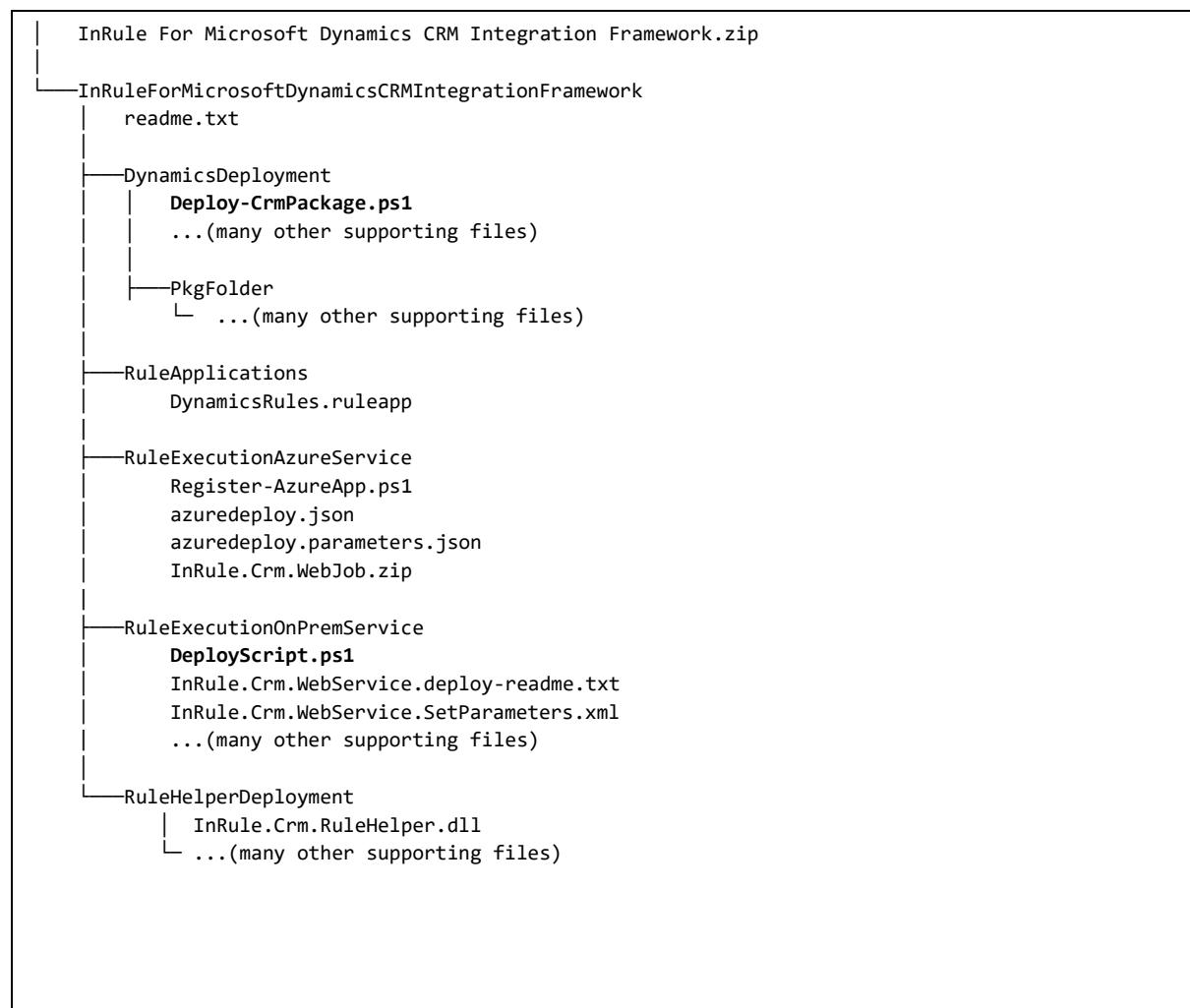
Required Files

The following files should be downloaded from [our support website's downloads section](#) before you begin:

- InRule for Microsoft Dynamics 365 Integration Framework.zip
- InRule Catalog Installer – InRule Installer.exe

Please download and extract each of these archives to corresponding subdirectories within a working folder.

When you are finished, you should have a directory structure that looks like this:



Files in **bold** will be used directly in the walkthrough steps below.

Rule Authoring Environment

A Rule Authoring Environment is used to upload a Rule Application to your catalog app service. A Rule Authoring Environment is a machine or virtual machine where irAuthor has been installed with the irX for Microsoft Dynamics 365 extension. If you followed the instructions outlined in [irX for Microsoft Dynamics 365 Help Documentation](#), then you should already have a rule-authoring environment available to you.

We have made it a point to call out the rule authoring environment separately because it is important to be aware of the licensing implications of this step. You will need to utilize an irAuthor license and an irX for Microsoft Dynamics 365 license for the duration of this process. If you're a system administrator who does not intend to perform rule authoring duties after the deployment is up and running, you can either choose to borrow an environment from someone who will use a rule authoring environment, or you will want to be sure to deactivate your license when you're finished with your deployment responsibilities.

Administrative Accounts

Dynamics On-Prem Organization Service URI: You will want to have the root URL of the organization web service exposed by your Dynamics 365 instance. The server URL is usually in the format of "[http://crm-server:port/organization-name](#)"

Dynamics Service Account Login and Password: You will want to have a username and account created specifically for use by the InRule for Microsoft Dynamics 365 Framework Web Service.

Administrative Password to use for SQL Server: You should decide what username and password you want to use for administrative privileges on the SQL Server. This walkthrough will construct a connection string that will utilize these resources to connect to the catalog.

*** This walkthrough will utilize the above administrative login and password for the Catalog Service to connect to the SQL Server Database. In a more secure environment, a separate SQL User should be created that only has access to the single database needed by the catalog. It is up to the reader of this document to go this more secure route.*

Administrative Password to use for Catalog Service: You should decide what username and password you want to use for administrative privileges within irCatalog.

*** This walkthrough utilizes the default login of 'admin' and password of 'password'. It will be up to the reader to go through the process of utilizing the Catalog Manager to change these credentials to be more secure.*

InRule License Keys

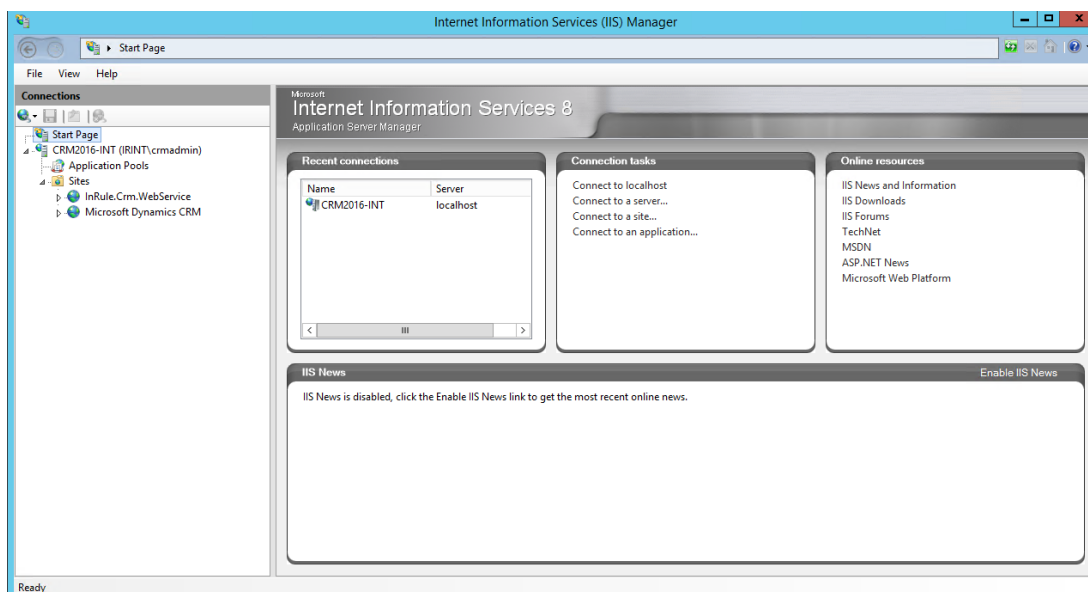
You will need your InRule irServer license keys. These can be found at <https://support.inrule.com/activations.aspx>. You can contact support@InRule.com if you have questions about where to get your license keys. For guidance on how to activate your keys, reference [Appendix I](#).

4.3 Deploying and Configuring Components

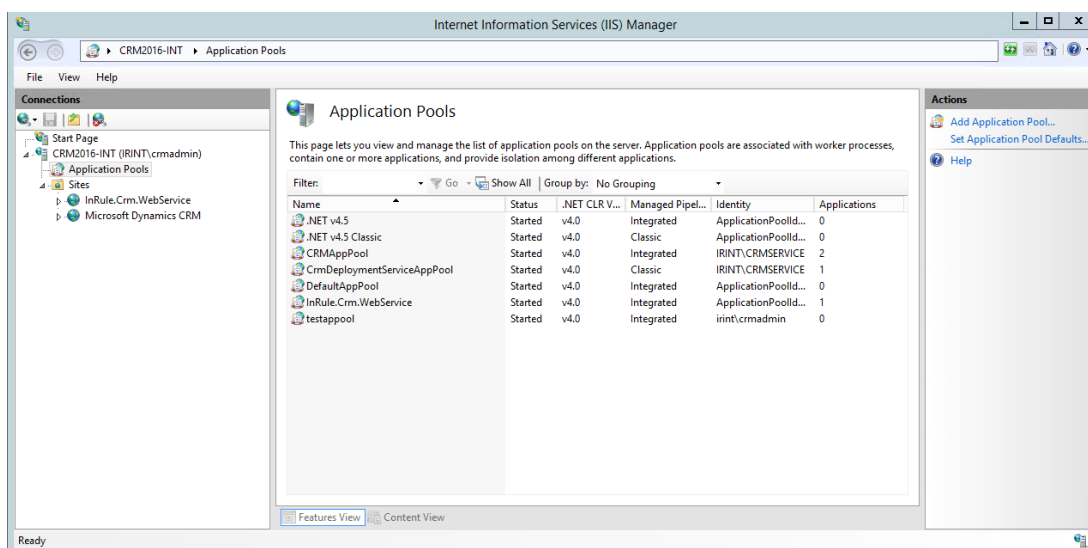
4.3.1 Setting Up an Application Pool in IIS

Before a website can be setup to host the catalog web service, a suitable application pool needs to be created. Any IIS server will already have a DefaultAppPool that can be used; whether this section is necessary will depend on your organizations architecture and requirements.

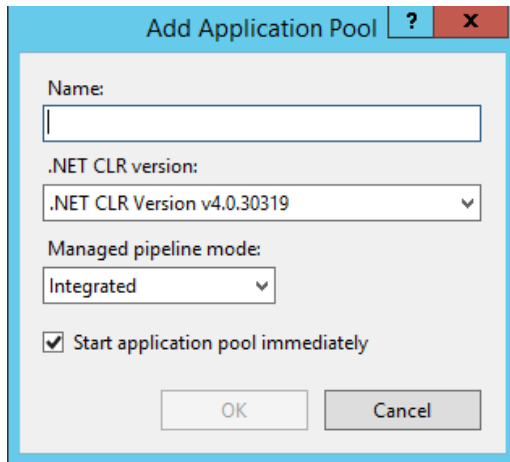
1: Open IIS Manager



2: Click on Application Pools on the left-hand nav pane

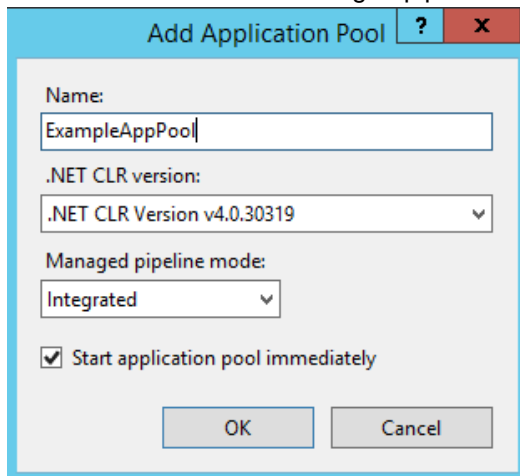


3: Click “Add Application Pool” under “Actions” in the right-hand pane

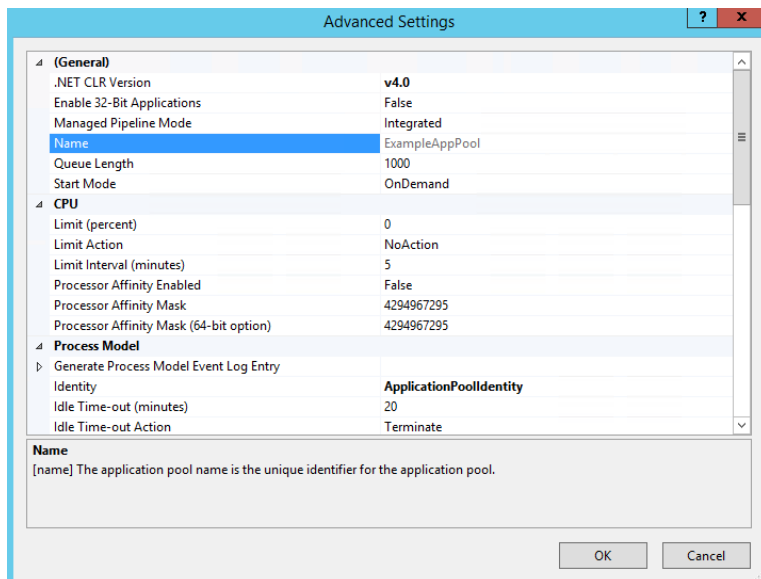


4: Define a name for the Application Pool and Create

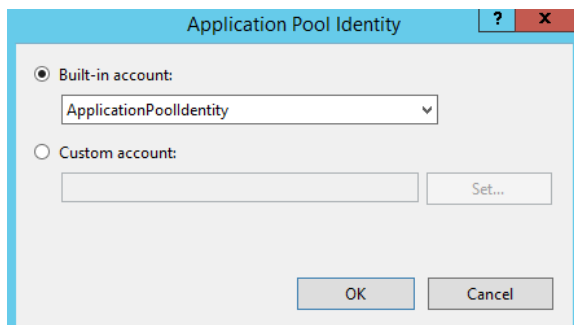
.NET CLR Version and Managed pipeline mode should be left as their default values. Press OK



5: Click on the new App Pool and Select “Advanced Settings” on the right-hand pane



6: Under the “Process Model” header, select the small “...” button next to the “Identity” property



Here you can select what kind of identity model you want to use for your application pool. You'll want to either use the Application Pool Identity or create a custom account.

The Application Pool Identity creates a virtual account with the same name as your new application pool. All worker processes within this application pool will run under this account

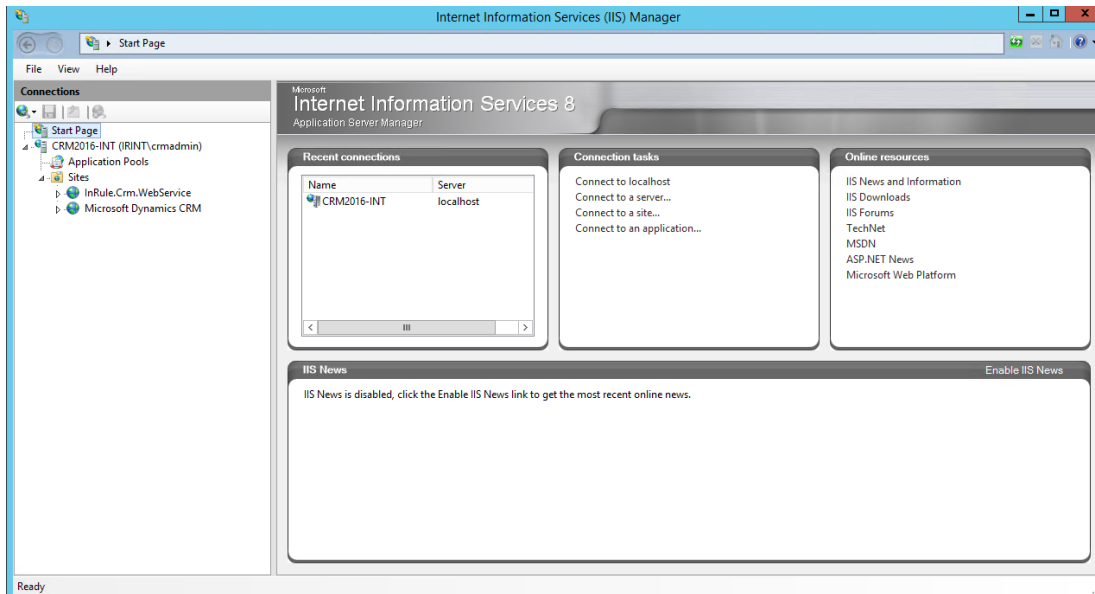
Custom accounts are the best solution if you want to use your Windows credentials to authenticate to the Catalog web service.

Press “OK” when you have made your selection and are finished.

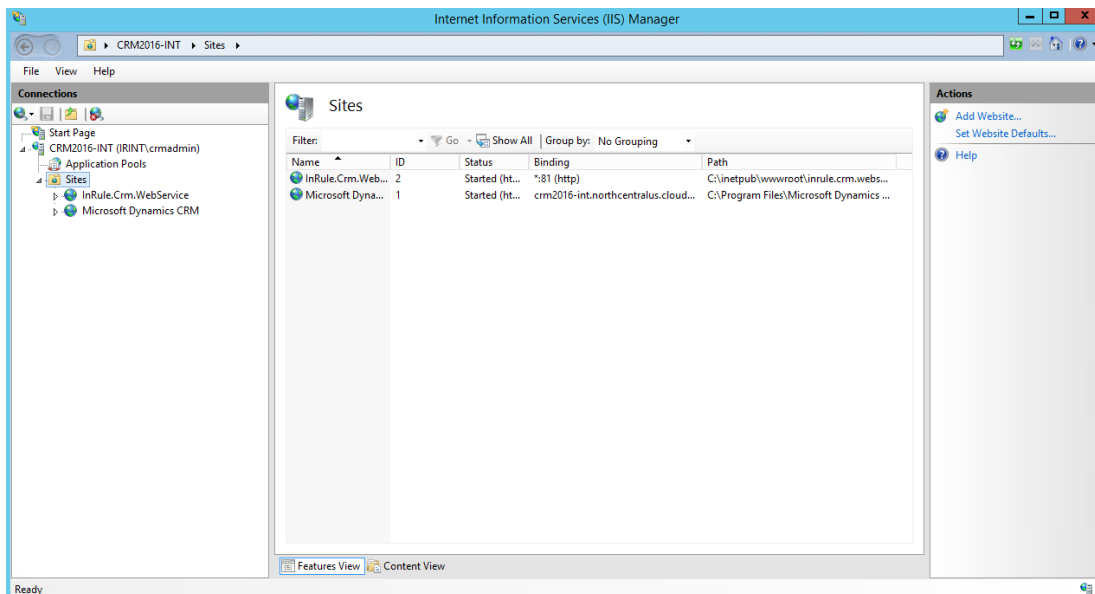
4.3.2 Setting Up the IIS Site for the Rule Execution Web Service

Next, we'll need to setup a website in IIS to host the execution web service. This will require a Windows Server with IIS installed.

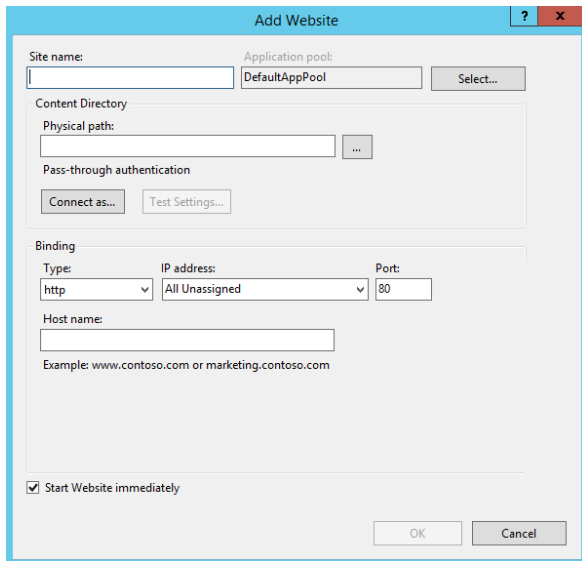
1: Open IIS Manager



2: Click on sites on the left-hand nav pane



3: Click “Add Website” under “Actions” in the right-hand pane



The screenshot shows the 'Add Website' dialog box with the following fields and values:

- Site name:** (empty)
- Application pool:** DefaultAppPool
- Content Directory:**
 - Physical path:** (empty)
- Pass-through authentication:** (empty)
- Binding:**
 - Type:** http
 - IP address:** All Unassigned
 - Port:** 80
 - Host name:** (empty)
- Start Website immediately:** ☒

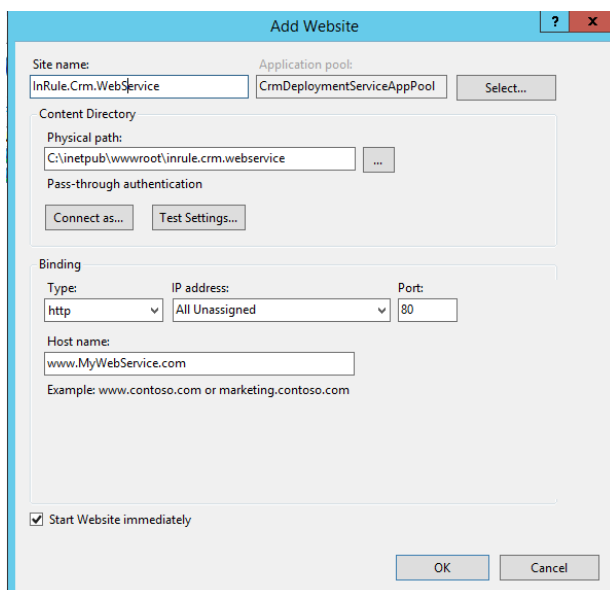
4: Define website information

Define a site name, application pool and host name for the website; these can be configured however makes sense within your organization.

The physical path needs to be set to the actual Dynamics Rule Execution web service folder. This will require you having the InRule components downloaded onto the same server you are setting up the website on

Lastly, select either HTTP or HTTPS, depending on which makes sense for your architecture. If you opt to use HTTPS, you will be required to select a certificate before you can finalize the site.

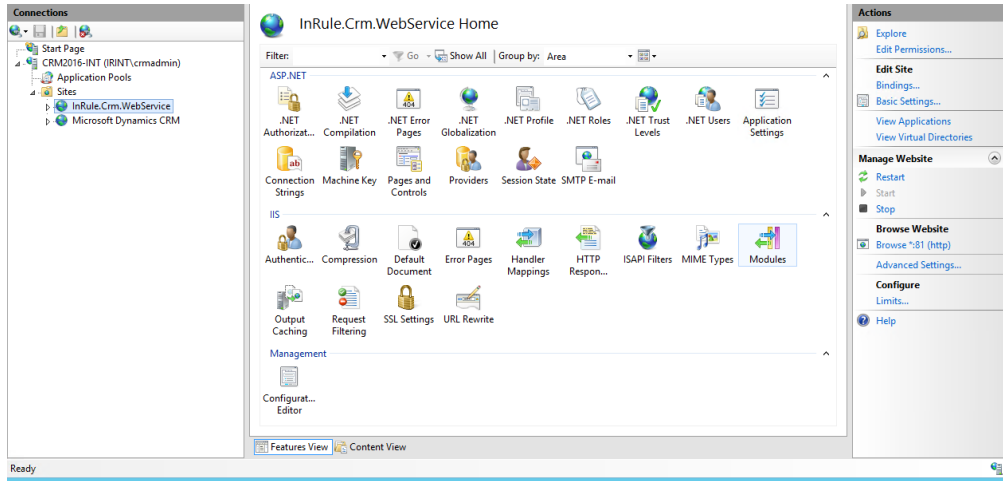
Once you’ve populated all the required fields, press OK to finalize and start the website



The screenshot shows the 'Add Website' dialog box with the following fields and values:

- Site name:** InRule.Crm.WebService
- Application pool:** CrmDeploymentServiceAppPool
- Content Directory:**
 - Physical path:** C:\inetpub\wwwroot\inrule.crm.webservice
- Pass-through authentication:** (empty)
- Binding:**
 - Type:** http
 - IP address:** All Unassigned
 - Port:** 80
 - Host name:** www.MyWebService.com
- Start Website immediately:** ☒

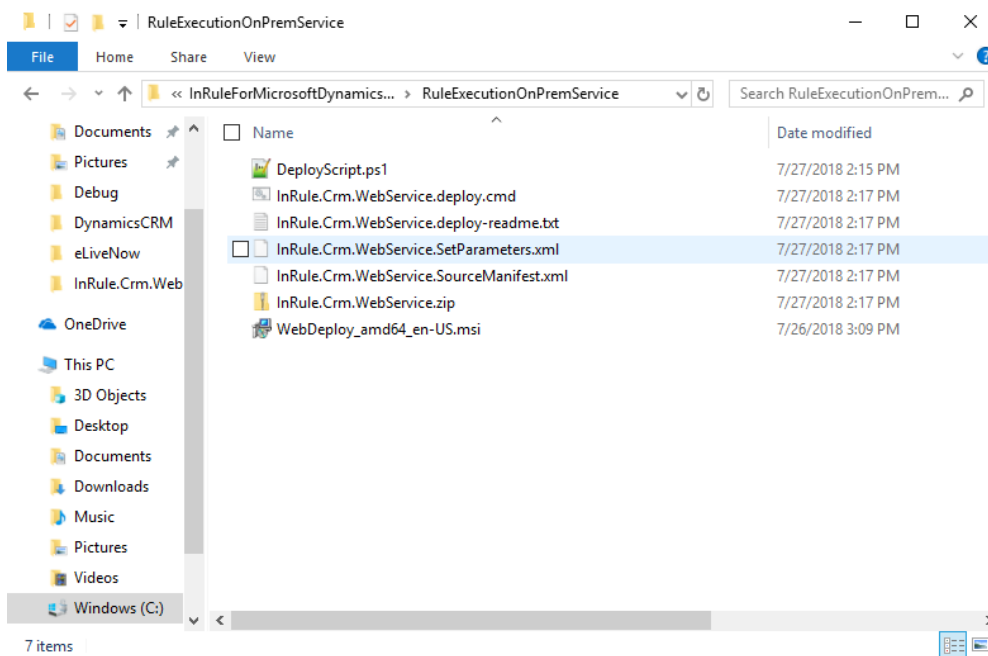
5: Verify your website successfully created



4.3.3 Deploy the Rule Execution Web Service

1: Open your “RuleExecutionOnPremService” folder:


For guidance on how to find this folder, reference the [“Required Files”](#) section above. The folder will need to be copied onto the IIS server you set up your website on in the previous section.



2: Open the InRule.Crm.WebService.SetParameters.xml file in Notepad or a similar text editor




3: Change placeholder parameter values to real values

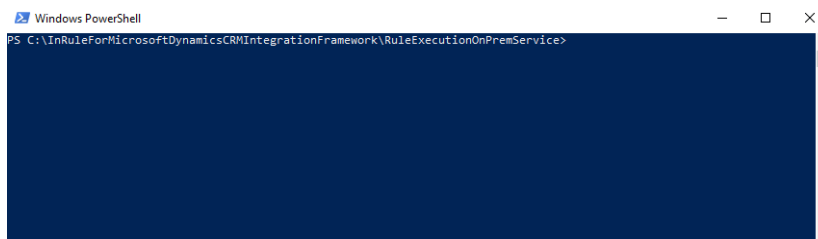
| | |
|---|--|
| 1 IIS Web Application Name | The name of your IIS website as defined in the “Setting up the Catalog Web Service in IIS” section |
| 2 UseInRuleCatalog | Defines if the catalog is being used to store rule apps. Set to true if using the catalog, and false if using file system |
| 3 CatalogUri | The URI for the Catalog Service that will be used |
| 4 CatalogLabel | Defines the label text used to by the service to target the specific rule app in the catalog. Labels are assigned to rule apps in the catalog |
| 5 CatalogUser | Username for Catalog Service, default value is ‘admin’. |
| 6 Catalog Password | Password for Catalog Service, default is ‘password’, please change this using the catalog manager! |
| 7 CatalogSSO | Defines whether to use app pool identity to authenticate to the catalog web service |
| 8 RuleAppDirectory | Specifies the directory where rule apps will be stored if using file system instead of the catalog. If using the catalog, leave as-is. |
| 9 DynamicsCRM-Web.config Connection String | <p>Provide a Dynamics connection string if you are not using S2S authentication, otherwise leave blank. Information on connection string formatting can be found here: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/xrm-tooling/use-connection-strings-xrm-tooling-connect</p> <p> Important: Some customers have reported needing to provide a username in the format “domain\username” in order to successfully connect using IFD.</p> |

4: Save your changes

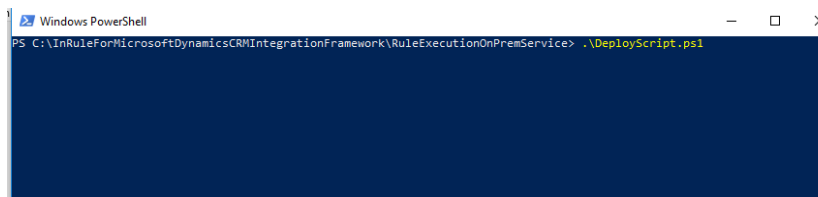
5: Launch PowerShell as an administrator

 Administrator: Windows PowerShell

6: Navigate to the “RuleExecutionOnPremService” folder



7: Run the “DeployScript.ps1” file




Observe that no errors occur while this script does its work.

4.3.4 Rule Services Solution for Dynamics On-Prem Deployment

At this point, all of the InRule server components are setup. The rule execution service should be listening for incoming communication from Dynamics. We must now setup Dynamics. To make this process easier, we will be using PowerShell.

1: Launch PowerShell as an administrator:

 Administrator: Windows PowerShell

2: Navigate to the '\Dynamics Deployment' directory:

```
PS C:\work\CRMIntegrationFrameworkTesting\2.3.4.81\InRuleForMicrosoftDynamicsCRMIntegrationFramework\DynamicsDeployment\tools> cd..
PS C:\work\CRMIntegrationFrameworkTesting\2.3.4.81\InRuleForMicrosoftDynamicsCRMIntegrationFramework\DynamicsDeployment>
```

3: Execute Deploy-CrmPackage.ps1

For Dynamics On-Prem v9, run Deploy-CrmPackage.ps1 with the added argument: -OnPrem. If you need to install the Dynamics On-Prem v8.2 compatible version, use -OnPrem_8_2 instead.

version 9.0

```
PS C:\> .\Deploy-CrmPackage.ps1 -OnPrem
```

version 8.2

```
PS C:\> .\Deploy-CrmPackage.ps1 -OnPrem_8_2
```

5: Provide Dynamics On-Prem Service Credentials

You will need to login for this script to continue, please be sure to check the 'Display list of available organizations' to make sure that you select the correct instance of Dynamics to install to!

Alternatively, the Deploy-CrmPackage.ps1 script also accepts a Dynamics Connection String:

```
.\Deploy-CrmPackage.ps1
```

```
-CrmConnectionString 'AuthType=Office365;Url=https://irroadsandbox.crm.dynamics.com/;Username=CRM\<username>.com;Password=<password>'
```

```
.\Deploy-CrmPackage.ps1 -CrmConnectionString
'AuthType=AD;Url=https://{DYNAMICSURL}.crm.dynamics.com/;Username={DYNAMICSUSERNAME};Password=
{DYNAMICSPASSWORD}'
```

This is a sample connection string; with an on-premise install, there are a wide variety of options that may be relevant, depending on your architecture. For more information on connection string formats, refer to Microsoft's available documentation, found [here](#).



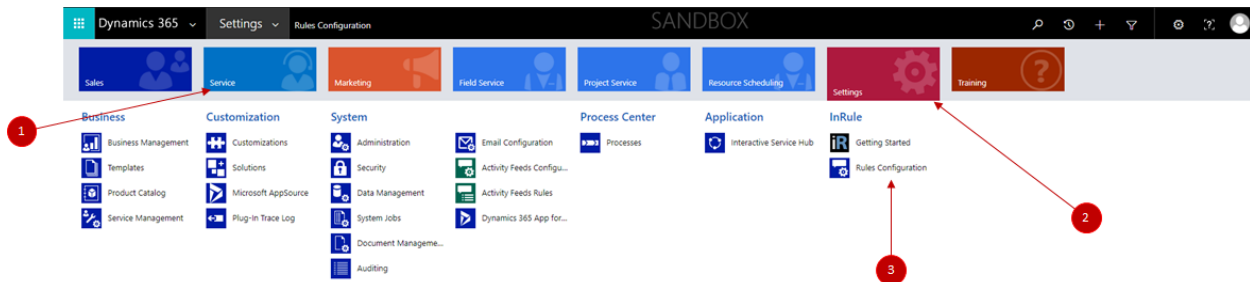
Important: Some customers have reported needing to provide a username in the format "domain\username" in order to successfully connect using IFD.

Observe that no errors occur while the script is executing.

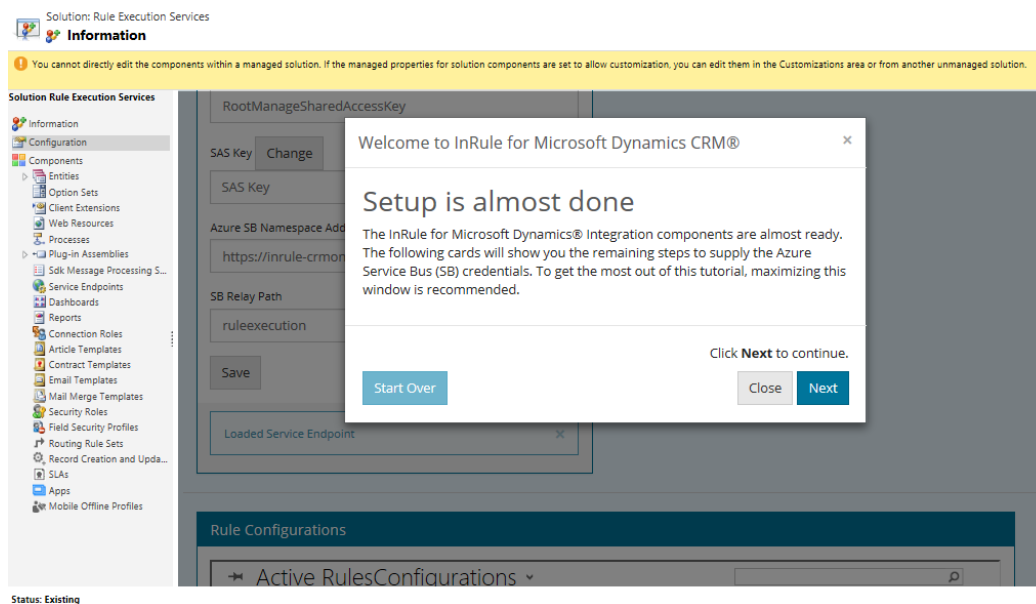
6: Configure the Rule Services Solution in Dynamics

Next, we need to tell the Dynamics Solution that has been deployed where to find the Rule Execution Service deployed earlier. We will need to have the Rule Execution Service URI ready for this step.

Navigate to the Rules Configuration Page



When the Rule Services Solution is entered for the first time, the Welcome to InRule for Microsoft Dynamics 365 wizard will appear:



Close the wizard, as it is applicable to Online only.

At the top of the Rules Services Solution configuration page, you will see the Service Endpoint Configuration options for the solution:

Service Endpoint Configuration

Service Endpoint ID: d2e50ca1-ef4c-e611-80e9-6c3be5a82b30

Endpoint Name
Default InRule Service Endpoint

SAS Key Name
RootManageSharedAccessKey

SAS Key **Set**
No SAS Key has been set

Azure SB Namespace Address
https://inrule-crmonline.servicebus.windows.net/ruleexecution

SB Relay Path
ruleexecution

Save

Do not configure, for Online only

All of these settings can be left as their default values for an on-premise installation, as they pertain to the Online solution only.

Instead of configuring the above, you will need to scroll down all the way to bottom to the “Rule Configurations” section and select the active Rule Configuration

Rule Configurations

Active RulesConfigurations Search for records

| ✓ | Name ↑ | Service Endpoint... | Created On | |
|---|---------|---------------------|-------------------|--|
| ✓ | Default | http://crm2016... | 7/18/2018 3:39 PM | |

1 - 1 of 1 (1 selected) Page 1

The following popup should appear:

RULE CONFIGURATION - INFORMATION

Default

Modified On
11/14/2018 9:23 PMModified By
First name LastStatus
Active

General

| General | |
|----------------|-------------------------------------|
| Name * | Default |
| Description | Default rules configuration options |
| RuleApp Name * | DynamicsRules |
| RuleSet Name | DefaultRules |

Advanced

Service Endpoint Id (or Uri) * `http://crm2016-int:81/CrmRuleExecution.svc/Execute`

Plugin

| | |
|------------------------------|----|
| Max Plugin Depth | 1 |
| Plugin Retry Interval | 0 |
| Plugin Retry Count | 2 |
| Rule Execution Log Enabled * | No |

Custom Action Settings

You can configure the naming conventions of this rule configuration as you see fit, but under “Advanced” on the right-hand side of the page, you will need to set the Service Endpoint URI to the URI of your Rule Execution Service endpoint

Advanced

Service Endpoint Id (or Uri) * `http://crm2016-int:81/CrmRuleExecution.svc/execute`

Be sure to click save (the small save button in the bottom-right corner)

7: Verify a successful deployment!

A ‘Run Rules’ button will now exist on the edit form of all Dynamics entities. The way this button behaves will depend on other settings that have been configured under the Rule Configuration section; this document assumes the default configuration behavior. To understand what settings are available and what they mean, please see [Appendix E: Methods for Executing Rules from Dynamics 365](#) of this document.

Open up an Account and execute ‘Run Rules’. The default deployment is configured to run a Rule App from the catalog named DynamicsRules, which is what we uploaded to the catalog in the Verify Catalog stage. If everything has been set up correctly, you should see the “Rule Execution Completed” message and the description of the account will be updated to provide the date and time.

It is worth noting that the On-Prem plugin will be deployed **outside** of Sandbox mode. To read more on why this is necessary and the resulting implications, reference [Appendix J: Known Issues, Limitations and Troubleshooting](#).

Appendix A: Additional Resources

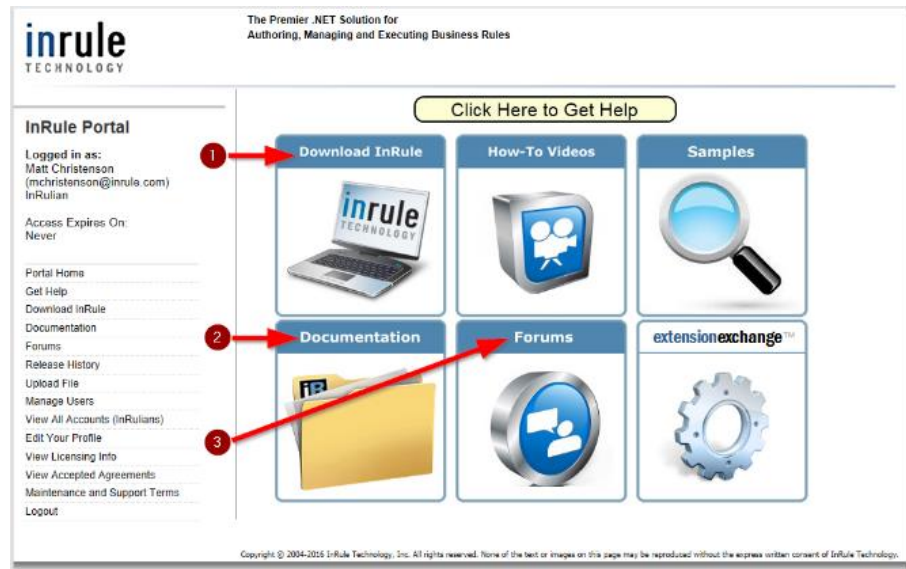
Having trouble? Relax! InRule offers many additional resources to help you get InRule correctly integrated with Microsoft Dynamics 365.

InRule's Support Website

InRule's support website can be found at <http://support.inrule.com>. If you do not already have a login for our support site, the client administrator at your company has the ability to create an account for you. If you are unsure of who your client administrator is, please email support@inrule.com.

The InRule Support Website has three different areas that readers should be aware of:

1. Downloads
2. Documentation
3. Forums



The Downloads section

The download section of the Support Website contains numerous resources that will likely be of interest to you:

InRule Installer*

Filed under the 'InRule' section of the downloads page, The InRule installer package will launch a graphical user interface that will walk the user through installing many of InRule's offerings. These offerings include both *irAuthor* which is used to edit Rule Applications, and *irX for Microsoft Dynamics 365*, which is an extension to *irAuthor* that allows synchronizing schema between Rule Applications and Dynamics 365.

*It is recommended that the reader of this document has established a rule-authoring environment by installing both *irAuthor* and *irX for Microsoft Dynamics 365* before attempting to deploy the *InRule for Microsoft Dynamics 365 Integration Framework*.

irX for Microsoft Dynamics 365 Help Documentation

Filed under the 'InRule for Microsoft Dynamics 365' section of the downloads page. This document discusses how to utilize the *irX for Microsoft Dynamics 365 irAuthor* extension to connect to Microsoft Dynamics 365 in a rule-authoring environment to synchronize rule application schema objects against Microsoft Dynamics 365 entities and to test Rule Applications directly against data coming from the Microsoft Dynamics 365 environment.

InRule for Microsoft Dynamics 365 Integration Framework Deployment Guide

This is the guide that you are reading now. The intention of this guide is to give a complete reference for those wanting to get the Integration Framework up and going as quickly as possible without deviating from what we consider to be the most common deployment scenario.

This is a fantastic place to start if you already have some familiarity with *irX for Microsoft Dynamics 365* and are ready to deploy the *InRule for Microsoft Dynamics 365 Integration Framework* as a runtime companion.

InRule for Microsoft Dynamics 365 Integration Framework

This downloadable archive contains all of the following located off of the root:

- **Rule Applications \ Dynamics Rules.ruleapp:** This Rule App is intended to be used both to test a basic deployment of the Integration Framework, but also to serve as a starting point for authoring further rules against your Dynamics 365 environment.
- **Rule Execution Azure Service:** This folder contains the app service package and configuration files that will be needed to deploy the Rule Execution App Service to Azure as discussed elsewhere in this document.
- **Rule Execution OnPrem Service:** This folder contains the web app and configuration files that will be needed to deploy the Rule Execution on-prem service as discussed elsewhere in this document.
- **RuleHelper Deployment:** This folder contains the .NET assemblies necessary to utilize the Rule Helper library to dynamically query Dynamics 365 for information during the execution of rules. RuleHelper is included with the Rule Execution Service, but also made available here for deploying to irAuthor's EndPointAssemblies folder
- **Dynamics Deployment:** This folder provides all of the resources needed to deploy the necessary Solution, Plugin, Endpoint, and Step registrations required to enable Dynamics 365 to send Rule Execution requests to an Azure Service Bus with an attached Rule Execution App Service.
- **ReadMe.txt:** This file contains some information about this Integration Framework, including historic release notes, product version information, and license information.

Catalog App Service – Azure Package and Config File

Found in the 'InRule for Microsoft Azure' section of the downloads page, this archive contains both the app service package and app service configuration files that you will need to perform an Azure based installation of irCatalog.

Catalog App Service – Install Documentation

This document will discuss how to install InRule's irCatalog in Microsoft Azure using a PaaS model.



InRule® for Microsoft Dynamics® CRM v5.2.0

Enterprise-grade rules for Microsoft Dynamics CRM

? [irX® for Microsoft Dynamics® CRM Help Documentation \(2 MB\)](#)

? [InRule® for Microsoft Dynamics® CRM Integration Framework Deployment Guide \(4 MB\)](#)

[InRule® for Microsoft Dynamics® CRM Integration Framework \(21 MB\)](#)

The Documents section

The documents section of the Support Website contains additional documentation about how the various components to InRule operate.

Although the documents section does not contain documentation that discusses integration with Dynamics 365 (that documentation can be found in the downloads section), it does contain the following three areas of interest:

1. Online Authoring Help: This document discusses anything you would need to know about how to author Rule Applications. The majority of this document applies to utilization of irAuthor, InRule's custom graphical authoring product.
2. Online SDK Help: InRule exposes an extensive .NET based API. This document discusses the use of the full SDK for use by software developers that would like to integrate with InRule.
3. Miscellaneous documentation section: Here you will find a variety of special interest documents, such as an installation guide, an implementation guide, and a guide that focusses on InRule's UDF language, irScript.

The screenshot shows the InRule Portal's Documentation section. On the left is a sidebar with navigation links. The main content area has a search bar and sorting options. Below these are links to online help for various versions. A table of documents is shown at the bottom, with red arrows and numbers 1, 2, and 3 pointing to specific links and the table itself.

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Authorized Licensee Docs
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extensionexchange
Utilities
InRule Version 3

The Premier .NET Solution for
Authoring, Managing and Executing Business Rules

Media » InRule Version 4 and 5 » Documentation

Documentation

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[For Online Authoring 4.1 Help \(click here\)](#), [For Online SDK 4.1 Help \(click here\)](#)
[For Online Authoring 4.5 Help \(click here\)](#), [For Online SDK 4.5 Help \(click here\)](#)
[For Online Authoring 4.6 Help \(click here\)](#), [For Online SDK 4.6 Help \(click here\)](#)
[For Online Authoring 5.0 Help \(click here\)](#), [For Online SDK 5.0 Help \(click here\)](#)

| Name | Date | Downloads | Comments |
|---|------------------|-----------|----------|
| InRule Technology Evaluation Guide by Mark Malen | Tue, Aug 8 2017 | 6 | 0 |
| InRule Implementation Guide by Alan Holley This guide is intended to provide high-level architectural and design guidance regarding the implementation... | Thu, Dec 10 2015 | 484 | 0 |
| InRule for Javascript Documentation by Mark Malen This is the documentation for our new offering "InRule for JavaScript" where you can execute... | Wed, Nov 18 2015 | 202 | 0 |
| Case Management Patterns and Practice Using InRule®... by Mark Malen Case management fundamentally changes the orientation of business applications from flow to data... | Tue, Jan 27 2015 | 287 | 0 |
| Windows Communication Foundation (WCF) Setup by Mark Malen This document provides instructions on how to install IIS, ASP.NET, and WCF on various operating... | Tue, May 6 2014 | 299 | 0 |

Online User Forums

Numerous internal resources at InRule monitor InRule Forums. This is the first place to go if you want to benefit directly from **the helpful and knowledgeable people** at InRule.

The Premier .NET Solution for
Authoring, Managing and Executing Business Rules

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Forums > InRule Forums > InRule For Dynamics CRM

InRule For Dynamics CRM

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| Topics | Replies | Views |
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| <input type="checkbox"/> InRule CRM Integration Error returned from rule service: Label has... Latest post by Dustin Oxford, Mon, Jul 31 2017 11:14 AM | 3 | 19 |
| <input type="checkbox"/> InRule Custom Action does not return the Notification or Error Latest post by Josh Elster, Fri, Jul 28 2017 9:31 AM | 1 | 7 |
| <input type="checkbox"/> Attribute a numeric value to an option set list of metadata in order... Latest post by Matt Christenson, Tue, Mar 21 2017 6:16 PM | 1 | 29 |
| <input type="checkbox"/> Exception in OnPremisePlugin.cs Latest post by Haribalachandar..., Wed, Dec 21 2016 3:16 AM | 4 | 30 |
| <input type="checkbox"/> IRx and Quote Details Latest post by nick.welburn@bupa..., Fri, Oct 28 2016 11:09 AM | 2 | 25 |
| <input type="checkbox"/> InRule for Dynamics CRM Latest post by Josh Elster, Thu, Nov 5 2015 4:16 PM | 1 | 41 |
| <input type="checkbox"/> 400 - Bad Request Latest post by Duchan, Thu, Nov 27 2014 8:28 AM | 0 | 37 |
| <input type="checkbox"/> Accessing a Parent's Parent and a childs childs child from an entity... Latest post by Chris Miller, Wed, Dec 18 2013 12:34 PM | 5 | 123 |

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InRule's Support Team

The support team at InRule is available to help with any product support needs, troubleshooting suspected product bugs, resolving any licensing issues, and free tele-hugs.

The best way to reach Support is through a detailed email sent to support@inrule.com.

You can also reach our support team by calling +1 (312) 648-1800.



InRule's ROAD Team

ROAD Services agreements can be used to engage with ROAD, InRule's professional services team.

ROAD can provide your organization with specialized consulting and tailored Architecture and Authoring Guidance.

ROAD can assist with less common installation requirements, such as deployment to third party cloud providers or integration with custom software.

ROAD can be contacted by emailing ROADServices@InRule.com



InRule Training Services

InRule offers the following interactive training services:

- Onsite and Remote attendance courses
- Hands-On multi-day courses with interactive labs
- Virtual Express training courses delivered online for rapid knowledge transfer

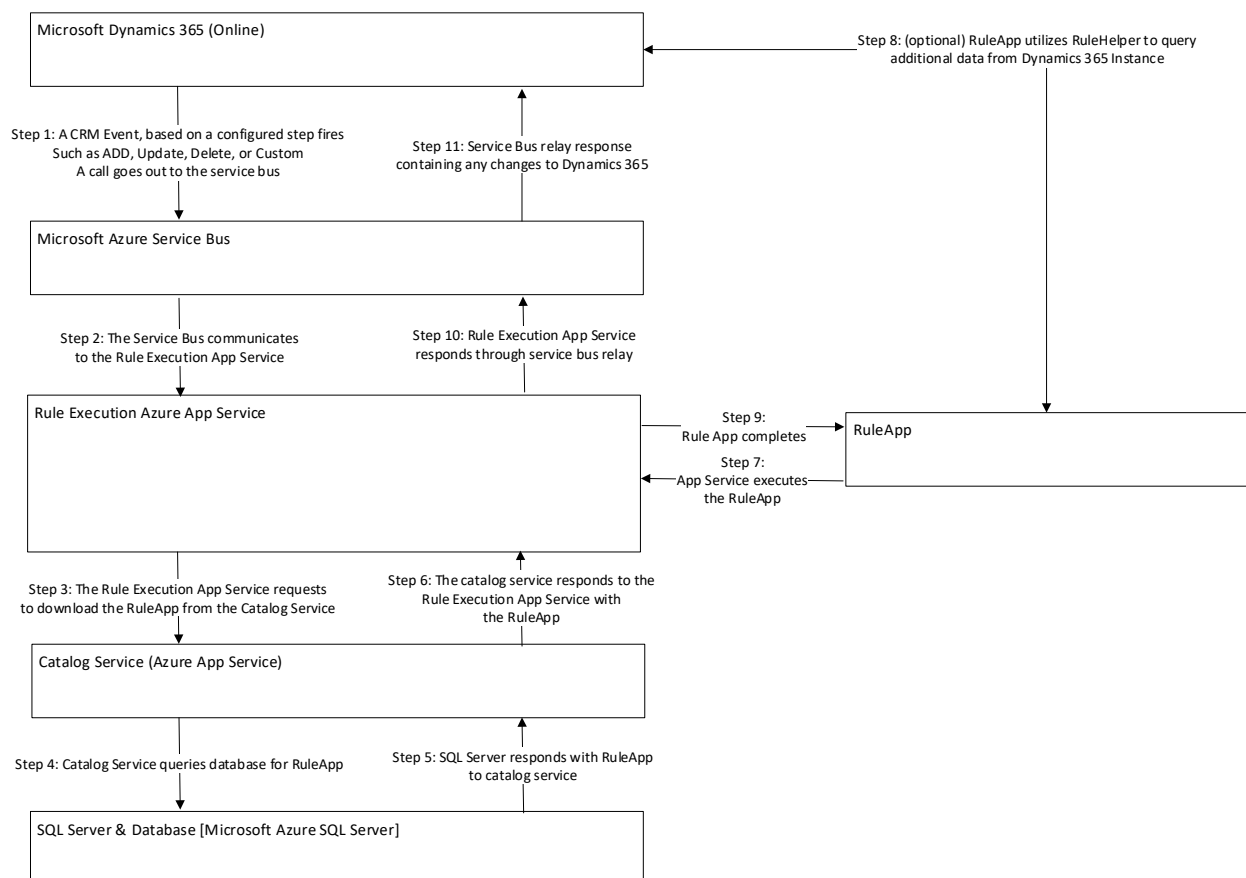
If you are interested in scheduling training services, please contact us at Training@InRule.com.



Appendix B: Anatomy of a Request for Execution of Rules Diagram

The below diagram helps to give a top-level understanding of how InRule is integrated with Microsoft Dynamics 365 (Online). Please note this diagram is a simplification that does not cover topics like caching, iterations, and multiple environments. It serves to show how the request moves through different Azure resources.

1. A Dynamics 365 Event based on a configured step fires, such as ADD, UPDATE, DELETE, or CUSTOM. This generates a call to the Service Bus, which is setup to relay requests to the connected Rule Execution App Service.
2. The Service Bus receives the request and relays it to the Rule Execution App Service, which has attached itself to the Service Bus as a relay listener. For On-Premise, the rule execution service interacts directly with Dynamics.
3. The Rule Execution App Service makes a request to the Catalog Service, asking for a copy of the requested RuleApp.
4. The Catalog Service Queries its SQL Server based database for a copy of the requested RuleApp.
5. The SQL Server responds with the RuleApp.
6. The catalog service responds to the Rule Execution App Service with the RuleApp.
7. The RuleApp executes inside the Rule Execution App Service.
8. Optionally, the RuleApp has an opportunity to query Dynamics 365 for additional data needed to execute rules.
9. The RuleApp completed execution
10. The Rule Execution App Service responds through the Azure Service Bus
11. The Azure Service Bus relays the response to Dynamics 365, where the receiving plugin synchronizes changes.



Appendix C: irX General Integration Concepts

Runtime Mapping across Nested Relationships

Much like Dynamics 365, the InRule rule engine offers strong support for hierarchical and relational data. Within a given Rule Application, data can be considered across parent-child relationships within a single rule request. These relationships can take the form of Collections (1 - * relationships) or 1 – 1 relationships.

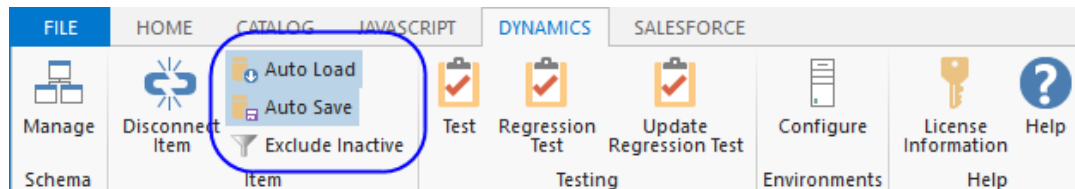
Note: When N:N relationships are imported into InRule, they behave as 1:N Collection relationships within the Rule Application.

In addition to the abilities of both products to handle relational data, both products also offer the ability to declaratively configure “Entities” and “Fields”. Both products also allow for different strongly-typed Entities and Fields to be accessed with loosely-typed SDK interfaces. Because of these inherent similarities and flexible interfaces, it is possible to build a reusable mapping component that can convert any given graph of loosely-typed Dynamics Entities to InRule Entities, and vice versa.

Controlling irVerify Behavior with Load, Save and Inactive Record Settings

When working with a tree composed of many related Dynamics Entities, it is often useful to have explicit control over which relationships are either automatically loaded or automatically considered in change detection for persistence. If a relationship is skipped during the initial load routines, then it is available to be conditionally populated later using rules.

In the irX rule authoring ribbon, there are three buttons that give the rule author the control to denote if a relationship should be automatically loaded, saved or have inactive records excluded.



Note: Automatic loading and saving is enabled by default for all relationships that are imported from Dynamics. The rule author can opt-out of these automatic behaviors by unselecting “Auto Load” or “Auto Save”. When these buttons are selected, metadata attributes are written into the Rule Application for the given relationship. These metadata attributes are used by the irVerify data loader when recursively loading data or detecting changes for persistence.

Important: If loading or saving is disabled for a given relationship, then it is also disabled for all Entities that are children of that relationship.

Since Microsoft Dynamics 365 uses the “inactive” status to do a soft delete of records, it is possible to include both active and inactive records when loading a Collection or relationship. You can use the “Exclude Inactive” button to exclude inactive records, returning only active records. To ensure that this feature works correctly, the child Entity of the Collection or relationship should map the Dynamics 365 **Status** field.

Appendix D: Accessing Dynamics 365 Directly from Rule Helper

In the default Rule Execution setup, all relationships between Entity types must be established before these entities can be used by the rule app. This behavior is intuitive, but it is not ideal for all business problems. The InRule Integration framework provides a 'Rule Helper' assembly that can be used directly in a rule app and allows rules to load, compare, and assign data that is not related in Dynamics before rules are executed.

When to use the Query from Rules Approach

The query from rules approach adds value for the following business problems:

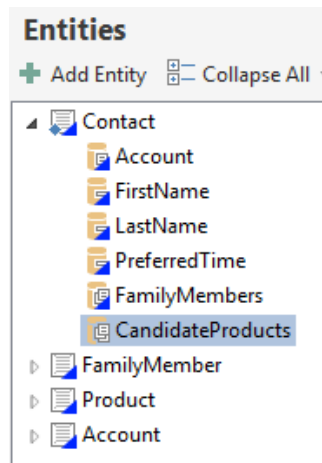
- The rules need to reference “lookup” information that may be in a list or set of Entities that are not specifically related to the current Entity hierarchy
- The purpose of rules is to create new relationships between Entity instances that already exist in Dynamics
- The rules need to compare many combinations of unrelated Dynamics Entities and produce results about best possible matches or scores
- A custom filter is required when loading data for 1:N or N:N relationships

Working with Disconnected Fields when Loading and Saving Data

One of the most important integration concepts when loading Dynamics data from rules is the notion of “Disconnected” Fields and Fields that have “Auto Load” and “Auto Save” disabled.

irX allows the rule author to explicitly control the “Auto Load” and “Auto Save” behaviors of Fields that are connected to Dynamics.

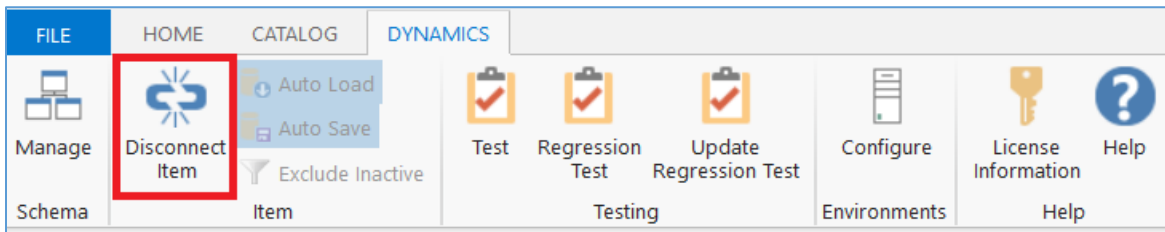
The example below shows a Collection named CandidateProducts. Since the Collection is not marked with a blue triangle, it is not considered to be attached to Dynamics.



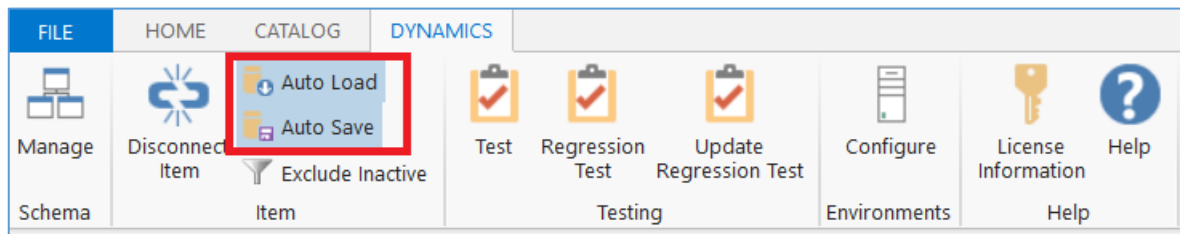
Important: Although Entity Fields and Collections may be “Disconnected” from Dynamics, the types contained by the Collections can be set to types that were imported from Dynamics.



Note: If a Field is added to the schema using irAuthor, then it will be disconnected from Dynamics. If a Field has been imported from Dynamics using irX, then it can be disconnected from Dynamics by clicking the “Disconnect Item” button in the irX ribbon.



Important: Two additional settings appear in the irX ribbon that offer additional control over automatic loading and saving behaviors for Fields that remain connected to Dynamics. In the example below, both buttons are “lit up”, which denotes that the settings are enabled. By default, automatic loading and saving is enabled for all Fields that are connected to Dynamics.

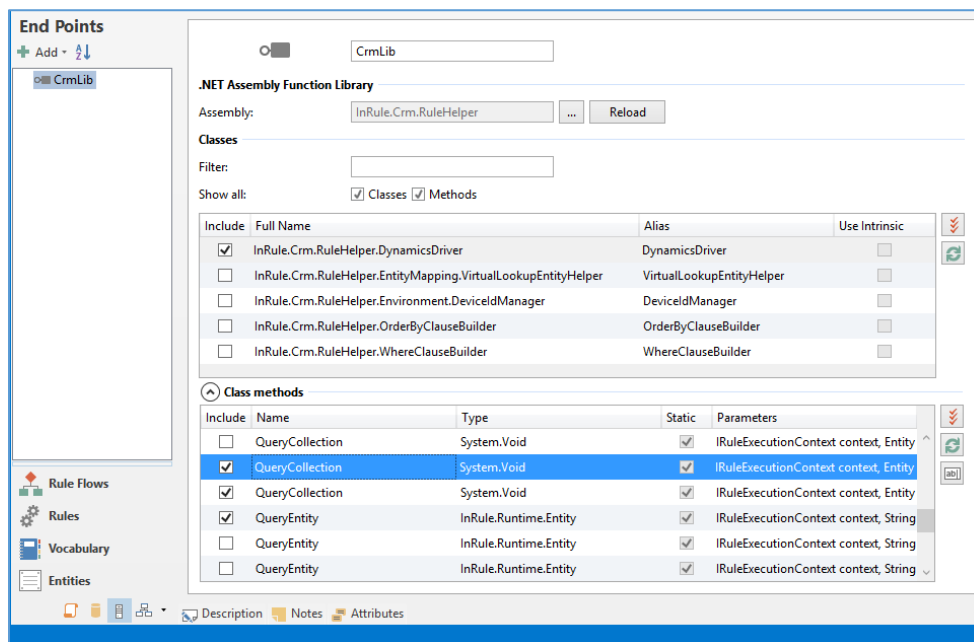


Integrating the Rule Helper Component

InRule provides a sample rule application (DynamicsRules) that is already configured for RuleHelper usage. You can simply edit this rule app, or, if you wish to integrate RuleHelper into an existing rule app, you can copy both the UDF Library “RuleHelper” and End Point “CrmHelper” from the DynamicsRules rule to another rule application.

If you wish to manually create the UDF Library and End Point in irAuthor, follow the steps below.

1. Create a new rule app using the irX add-in for irAuthor.
2. Create a new “.NET Assembly Function Library” end point and bind the end point to the InRule.Crm.RuleHelper.dll assembly. Select the DynamicsDriver class and then select the methods that should be callable from rules. Edit the name of the end point to “CrmLib” or similar. Select the methods from the DynamicsDriver that are needed for the Rule Application. You do not need to select all the methods—only import the methods that will actually get used by rules. Additional methods can always be imported later by revisiting the endpoint screen and reloading the assembly.




3. Add a User Defined Function library and set the name to “CrmHelpers” or similar. This library will contain functions that the rules will call to query Dynamics.
4. Add a User Defined Function to the new library. The example below shows a UDF that will be used to execute the QueryCollection method on the DynamicsDriver. Fill out the UDF with script that will call a method on the DynamicsDriver.


Note: The methods on the DynamicsDriver are designed to be reused for more than one Entity type, Field, or set of Fields. The name of the Target Field or Collection should be supplied as a string. When querying a Collection of results, an optional “where” clause can be provided that will be forwarded to calls against the CRM SDK. In addition, an “order by” clause can be provided to return sorted results.

Important: This integration pattern relies on the “Context” object that is available from irScript. The Context object returns information based on the context under which a given UDF is executed. For example, when executing an Entity Rule Set, the Context.Entity returns

a reference to the Entity against which the current Rule Set is executing. The Context and its child properties are passed to the DynamicsDriver so it has enough information to form calls to Dynamics 365 and map responses back to the InRule Rule Session.

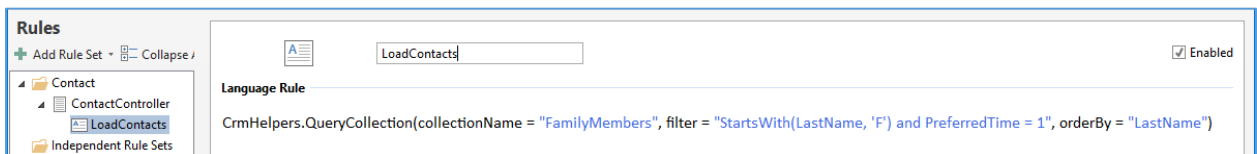
 **Note:** The Context.FunctionLibraries property can be used to create calls to the .NET assembly library methods, such as the methods imported in Step 5 above. The following script example demonstrates how to use the Context object in irScript to form a call to a static .NET method:


```
Context.FunctionLibraries.DynamicsDriver.QueryCollection(Context,
Context.Entity, collectionName, filter, orderBy, connectionString);
```


 **Important:** The “connectionString” argument is optional due to overloading of the methods on the DynamicsDriver class. If the connectionString is not passed in the by the rule engine, then it will be looked up from either the .NET config file based on the given environment. A sample connection string that need to be defined in the irAuthor.exe.config XML is included below. For information on Dynamics connection string formatting, refer to <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/xrm-tooling/use-connection-strings-xrm-tooling-connect>


```
<connectionStrings>
  <add name="DynamicsCRM"
    connectionString="AuthType=Office365;Username=jsmith@contoso.onmicrosoft.com;
    Password=passcode;Url=https://contoso.crm.dynamics.com"/>
</connectionStrings>
```

- Rules can now be authored to execute methods on the DynamicsDriver. These methods can be used to load Collections, single Entities, or single Fields from Dynamics based on conditional logic within rules.



 **Note:** The example above includes a call to the default business language templates for a method on the DynamicsDriver. The InRule vocabulary features can be used to modify these templates to be more user-friendly for business users.

 **Important:** The Target Collection in the sample rule is called “FamilyMembers”. This is a Field that either does not exist in Dynamics (only for use in rules), or has been imported and then “disconnected” from Dynamics using the “Disconnect Field” button, or has “Auto Load” disabled.

 **Note:** Please see the following sections for more details on the creating the “filter” clauses similar to the one used this example.

Filtering Queries using the Where Clause Builder

When loading data from Dynamics during rule execution, it is critical that the rule author is able to author logic to specify which Entity data to load. Using the RuleHelper, this is accomplished by allowing the rule author to pass in a “filter” or “where” clause into the calls against the DynamicsDriver class.

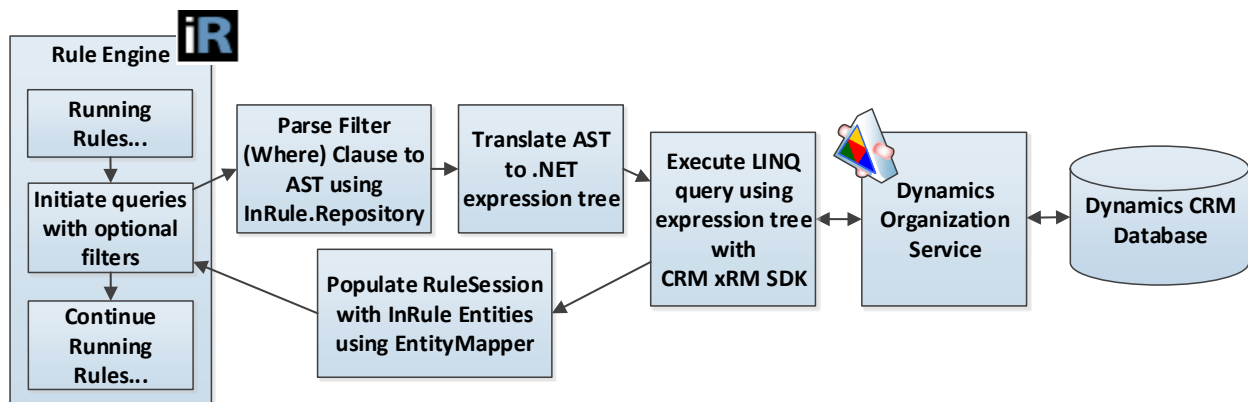
During execution of the DynamicsDriver, the filter clause is parsed into an Abstract Syntax Tree (AST) and then translated into a LINQ expression tree, so it can be consumed using the CRM SDK. The filter clause is based on the InRule function syntax format.



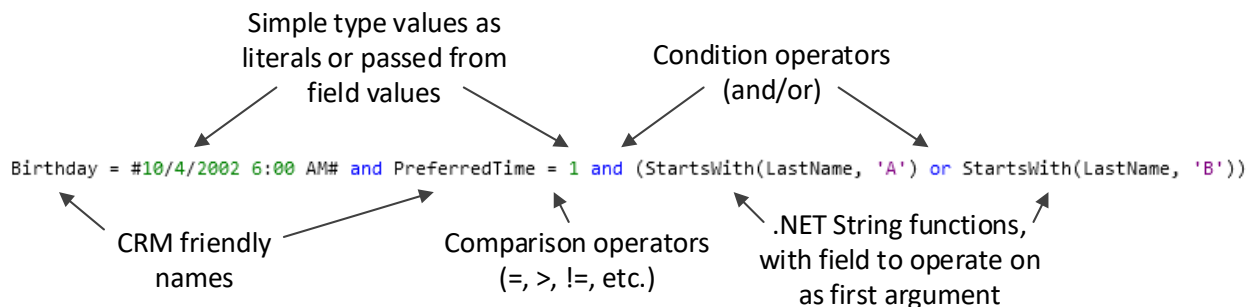
Note: The InRule function syntax format is used for the following reasons:

- The syntax rule format is consistent with the rule authoring experience used throughout irAuthor
- This format can make good use of the InRule AST parser that is included as part of irSDK

The diagram below depicts the logical flow of steps used by the DynamicsDriver and WhereClause builder classes to query data from rules.



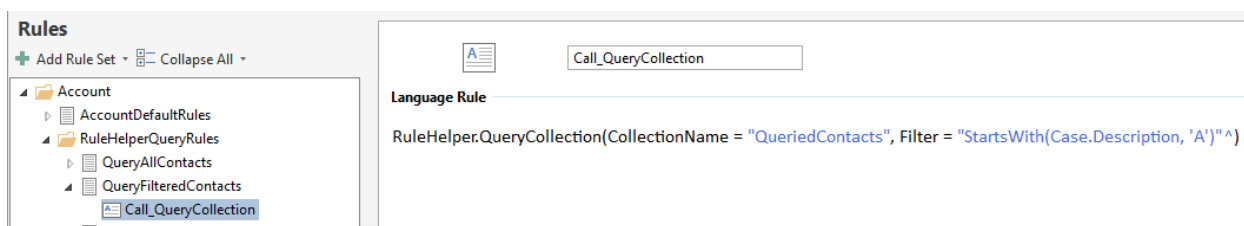
The diagram and notes below contain some additional information about forming the filter clause in a rule:



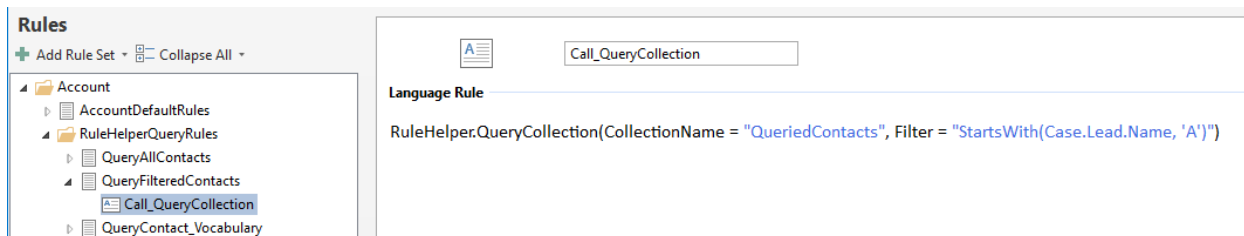
- All the Field names that are used are the Dynamics friendly names that are used in the Rule Application. These names are mapped back to the Dynamics Field names in the parser.
- String literals should be wrapped in single quotes, date literals should be wrapped in pound signs.
- Simple operators are supported to compare values, such as =, !=, >, < (ex. Age > 21, Name != 'Ralph').
- Multiple conditions can be chained together using 'and' and 'or' keywords.
- The expression tree builder will attempt to call a given .NET framework function if it appears in the expression.

- The .NET call must be expressed as a function, with the first argument being the name of the Field to operate on. The remainder of the arguments will be passed through in order to the .NET function call when it is formed.
- Examples: `StartsWith(FirstName, 'A')` `EndsWith(LastName, 'ez')` `Contains(LastName, 'Smith')`
- Any non-static methods on the .NET String class are candidates to be called as functions using the parser syntax above. However, InRule has only tested the `StartsWith`, `EndsWith`, and `Contains` methods on the String class.
- The following keywords and operators are supported by the InRule AST parser and expression tree translation code: `=`, `<>`, `!=`, `+`, `-`, `*`, `/`, **or**, **and**, **xor**, `>`, `>=`, `<`, `<=`, `^`, `%`

The filter expression also supports querying against related entities, simply by appending the related entity name in front of the relevant query field. Querying against related entities requires that all **entities** queried in the relationship chain be imported into irAuthor. The queried **fields** on each of the queried entities do not necessarily need to be imported, but if they are not, the entire Dynamics schema field name must be used, rather than their irAuthor aliases.

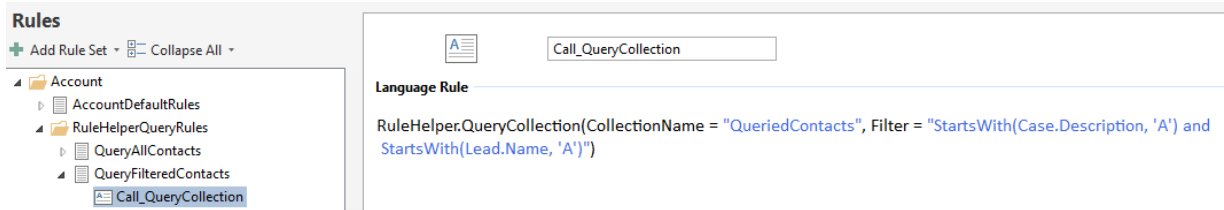


In this example, we are populating a collection by querying the Contact entity, which is the “parent” entity here. We are then applying a filter statement to return only contacts with related Cases that have Descriptions starting with “A.” Cases in this example is the “child” entity. Notice how the hierarchy of the related entity down to field is denoted. If you wanted to drill down another layer to a “grandchild” entity (in this example, an entity related to Case), it would be accomplished by simply continuing the chain from entity to field. Below is an example of a “grandchild” case:



This example would return Contacts that have related Cases with related Leads with names starting with “A.” The filter expression can support querying in this manner up to 4 “layers” deep, including the initially queried entity. Put another way, it can support up to the “Great-Great-Grandchild” level.

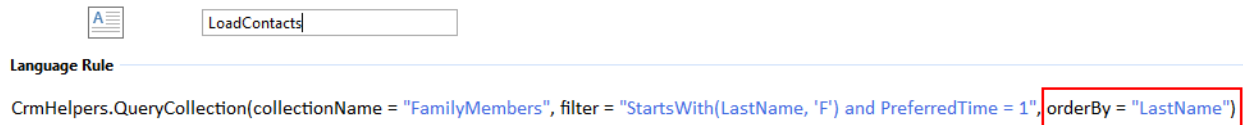
The filter expression supports querying against multiple properties from different related entities. In the below example, we are querying for Contacts with Cases that have Descriptions starting with “A” and also have Leads with Names starting with “A.”



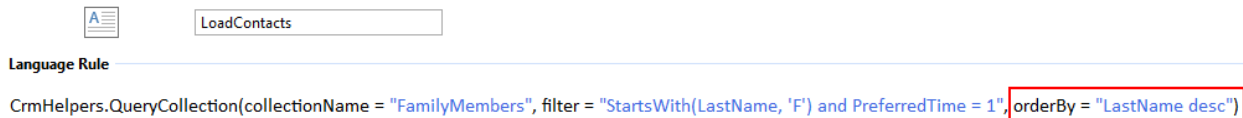
Ordering Query Results with the OrderByClauseBuilder


The DynamicsDriver class also supports the ability to control the order of the results returned from Dynamics by passing in an optional “order by” clause. The order by clause can accept only a single Field name, which should be the name of the Field in the Rule Application. The results are always sorted in ascending order, unless the Field name is followed by the “desc” syntax. Please see the examples below:


To sort ascending, pass the Field name to use in the sort:



To sort descending, pass the Field name to use in the sort followed by the “desc” keyword:



 **Note:** The “order by” clauses generally contain much simpler expressions than “where” clauses. However, InRule syntax rules format is used for the order by clause to be consistent with the where clause approach.

 **Important:** The parsing and translation of the order by clause is handled in the Rule Helper contained in the OrderByClauseBuilder class.

Methods Available in the Rule Helper

The following table lists the public, static methods that are available in the DynamicsDriver

| Method Name | Description |
|---------------------------|--|
| LoadMappedChildCollection | Populates a child Entity Collection based on an existing 1:N relationship in Dynamics. The Collection is populated based on existing parent-child relationship data in Dynamics. |
| LoadMappedChildEntity | Populates a child Entity Field based on an existing 1:1 relationship in Dynamics. The Field is populated based on existing parent-child relationship data in Dynamics. |
| QueryCollection | Populates an Entity Collection with a set of a given Entity type. An optional filter clause (where clause) can be used to define selection criteria for the Entity set. The Collection does not need to correspond to a 1:N relationship in Dynamics. |
| QueryEntity | Populates an Entity Field or variable based on a query to Dynamics. An optional filter clause (where clause) can be used to define selection criteria for the Entity. The Field does not need to correspond to a 1:1 relationship in Dynamics. If more than one Entity is returned from the query to Dynamics, then the first Entity in the set is used. |
| QueryField | Populates a primitive Field or variable based on a query to Dynamics. An optional filter clause (where clause) can be used to define selection criteria for the Entity. If more than one Entity is returned from the query to Dynamics, then the Field value from the first Entity in the matching set is used. |
| QueryNtoNCollection | Loads entities across an N:N Collection that has been defined in Dynamics. The relationship name and parent and child ID Fields must be provided. |
| LoadMappedNtoNCollection | Similar to QueryNtoNCollection, except that the relationship must be imported into the Rule Application. |
| GetUserLocalTimeFromUtc | Converts a Dynamics UTC time value into the local time for a given user. This method makes use of the LocalTimeFromUtcTimeRequest that is part of the CRM SDK. |

Additional Flags Available to Control Loading and Caching Behaviors in the Rule Helper

During a given query operation, there may be advanced use cases that require specific control over loading or reloading data from Dynamics 365. The optional overloads of the QueryEntity and QueryCollection methods expose a set of optional Boolean flags that help control caching and depth of loading behaviors. The table below list these parameters:

| Parameter Name | Description |
|-------------------|--|
| loadChildren | Denotes if the execution service should recurse the Entity graph and load all children. If false, no children are loaded below the Collection Members that are loaded. The default value is true. |
| useCaching | Denotes if previously loaded Dynamics Entities should be reused from the InRule entity cache, or if new Dynamics instances should be created. If false, a copy of the Entity is created, and its Instance ID is not set to the GUID of the Dynamics Entity. The default value is true. |
| overwriteIfLoaded | Denotes if a previously loaded Dynamics Entity should be repopulated with the latest values in Dynamics. This behavior will overwrite Field values stored in the cache. The default value is false. |



Note: The default values should always be used for the cache settings unless there is a specific use case that requires different behaviors.

Appendix E: Methods for Executing Rules from Dynamics 365

Understanding your Options for the Initiation of Rule Execution from Dynamics 365

There are two major options that an implementer might take when deciding how rule execution will be initiated.

Options for the initiation of rule execution

Option 1: CRM initiates rule execution automatically in response to Create, Update, or Delete events against an entity.

Details about what entity, event, RuleApp, and RuleSetName to use are defined by creating a step on the *Inrule Rule Execution Services Solution – Rule Configuration Form*.

Option 2: Initiate rule execution via the 'Run Rules' button, InRule Workflow Activity, or custom user code using the InRule Custom Action step pre-configured with the plug in.

Details about which rules to call and what settings to use are made on a call by call basis.

Each of these options offer both advantages and disadvantages. It is not uncommon for an implementer to use both of these options in combination with each other.

In this section, we explain the advantages and disadvantages of each technique.

Executing Rules in Response to Entity Create or Update Events

Overview

The Rule Services Solution contains a plugin that can act as a handler for events fired by Microsoft Dynamics 365. By registering new steps to a known set of Create or Update events against Microsoft Dynamics 365 Entities, rules execute against the entities that are associated with an event as it occurs. An implementer must use the Plugin Registration Tool provided by the Microsoft Dynamics 365 Software Development Kit (SDK) to assist in the registering of these steps.

Advantage of Letting Dynamics 365 Initiate Rule Execution in Response to Events

Rules execute against an entity as it is being created or updated no matter how those events are initiated. This means that not only will rules be executing when creating or saving entities from within the Dynamics 365 Entity Forms UI, but they are also executed when entities are changed through API calls.

API calls are frequently consumed by 3rd party add-on user interfaces, Extract-Transform-Load (ETL) synchronization with other software products, and by custom software solutions as an integration point with Dynamics 365. By utilizing this option, an implementer can take advantage of rule execution for needs beyond the Dynamics 365 Entity Forms UI.

Disadvantage of Letting Dynamics 365 Initiate Rule Execution in Response to Events

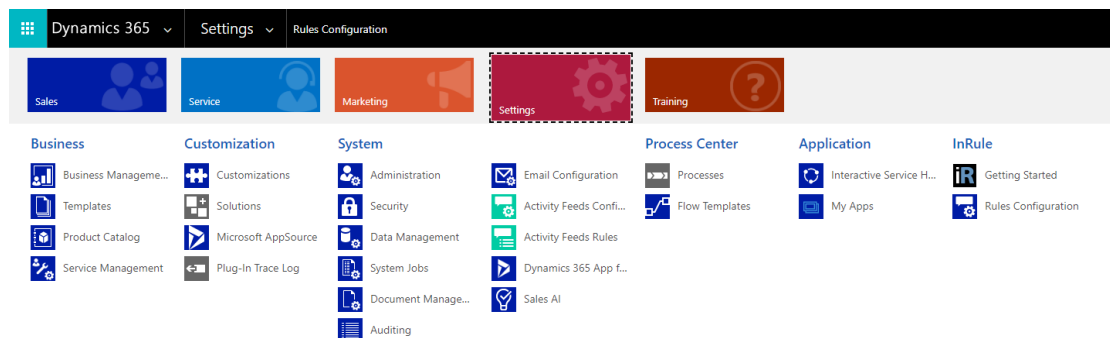
The Dynamics 365 Entity Forms UI (or any other UI for that matter) will not be aware of any feedback given by the execution of rules such as errors, validation issues, or Notifications. This is because the UI is not aware that rules have run. The only way for the UI to know that rules have executed is to initiate rules from within the UI by manually calling the InRule Custom Action, and then iterating through the results of the call to update any UI based on rule engine feedback.

Configuring Plugin Steps for Initiation of Rules Execution through Create and Update Events

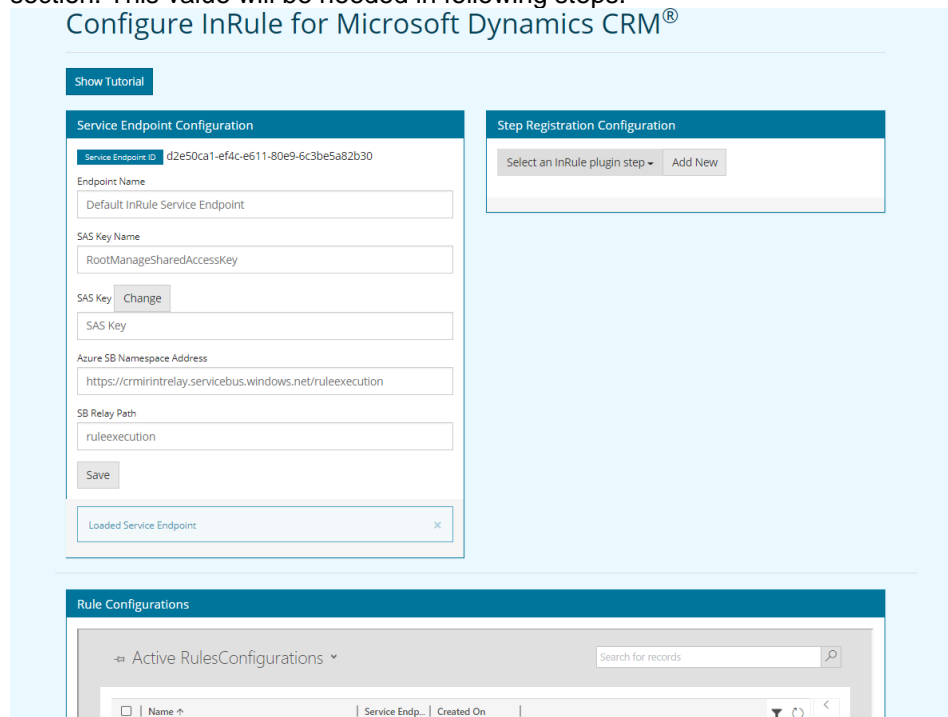
This section explains how to configure rule execution on create and update events generated by Microsoft Dynamics 365. If you are interested in understanding the advantages and disadvantages of this route, please be sure to first review [Understanding your Options for the Initiation of Rule Execution from Dynamics 365](#).

You can register plugin steps using the InRule Rules Configuration page included with the solution, or by using the Plugin Registration Tool from the Microsoft Dynamics 365 Software Development Kit (SDK): Link as of Feb 2018: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/download-tools-nuget>

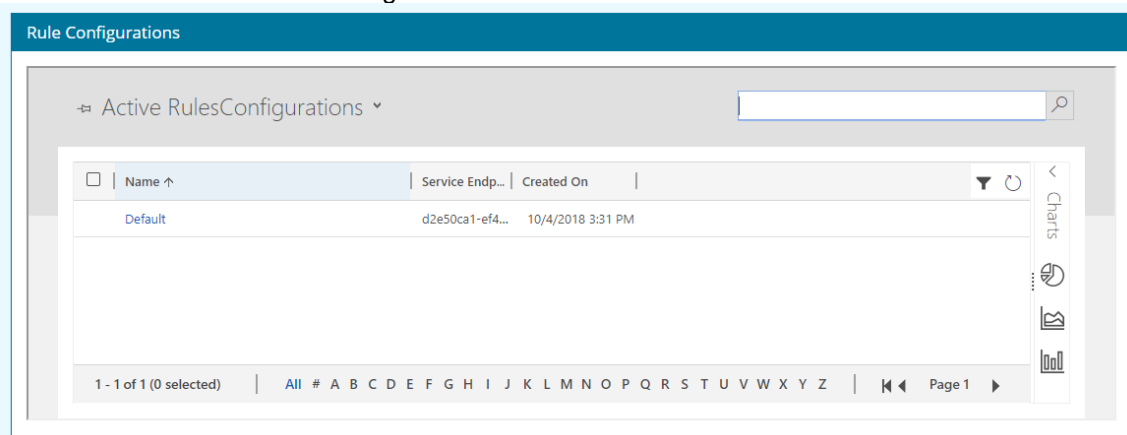
1. Login to Dynamics 365 and go to the “Settings” tab and select Rules Configuration under the InRule section



2. Note the Service Endpoint ID that appears at the top of the “Service Endpoint Configuration” section. This value will be needed in following steps.



3. Scroll down to Active RulesConfigurations



4. Right click on “Default” and select “Open in New Window.” The following should open up in a new tab:

NEW RUN RULES DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG FLOW ...

RULE CONFIGURATION : INFORMATION

Default

Modified On: 11/5/2018 9:55 AM

Modified By:

Status: Active

General

| | |
|----------------|-------------------------------------|
| Name * | Default |
| Description | Default rules configuration options |
| RuleApp Name * | DynamicsRules |
| RuleSet Name | DefaultRules |

Advanced

Service Endpoint Id (or Uri) *: d2e50ca1-ef4c-e611-80e9-6c3be5a82b30

Plugin

| | |
|------------------------------|----|
| Max Plugin Depth | 1 |
| Plugin Retry Interval | 0 |
| Plugin Retry Count | 2 |
| Rule Execution Log Enabled * | No |

5. Select “New” in the top right

SAVE SAVE & CLOSE NEW RUN RULES FLOW FORM EDITOR

RULE CONFIGURATION : INFORMATION

New Rule Configuration

Modified On: -----

Modified By: -----

Status: Active

General

| | |
|----------------|-------|
| Name * | ----- |
| Description | ----- |
| RuleApp Name * | ----- |
| RuleSet Name | ----- |

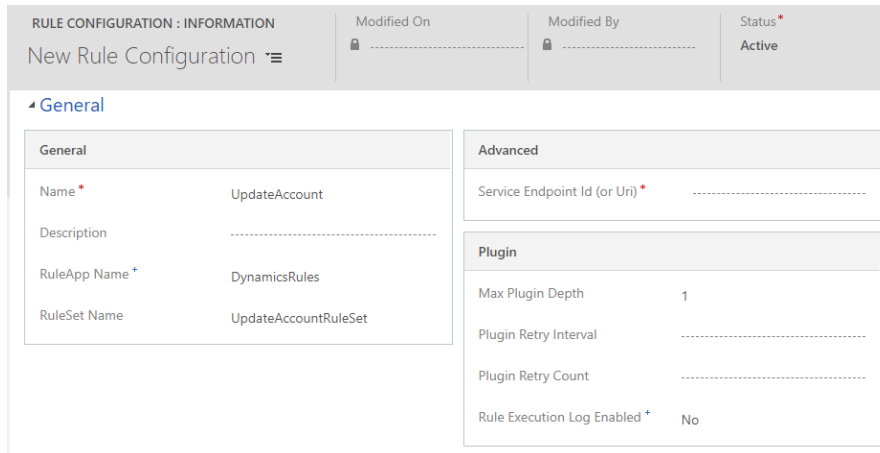
Advanced

Service Endpoint Id (or Uri) *: -----

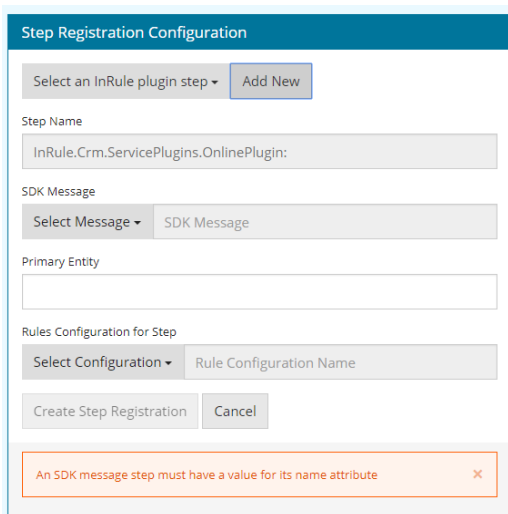
Plugin

| | |
|------------------------------|-------|
| Max Plugin Depth | ----- |
| Plugin Retry Interval | ----- |
| Plugin Retry Count | ----- |
| Rule Execution Log Enabled * | No |

6. Configure the Rule Configuration as follows:
 - a. Choose a name
 - b. Create a description
 - c. Enter the RuleApp containing the RuleSet you want
 - d. Enter the RuleSet you want executed when the step is invoked
 - e. Set "Service Endpoint Id" on the right side equal to the ID noted in Step 2
 - f. Press "Save" in the top-left corner
 - g. Repeat this process for every step you want to register

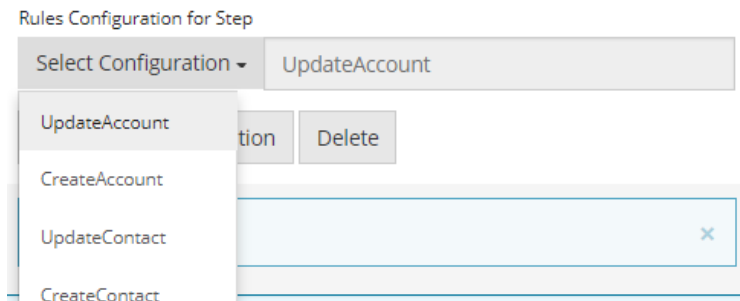


7. Return to the Rules Configuration page and navigate to the Step Registration Configuration section and click **Add New**

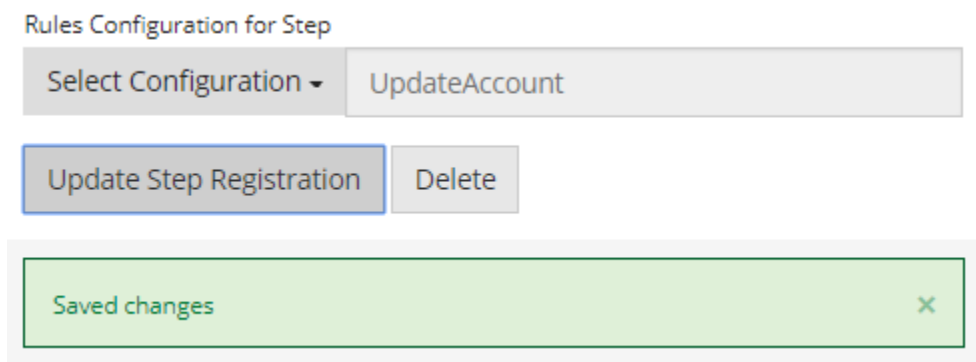


8. Choose the SDK Message (Update, Create, inrule_RulesEngineAction)
 - a. Update – Update of the primary entity
 - b. Create – Create of the primary entity
 - c. inrule_RulesEngineAction – The custom action message invoked when the 'Run Rules' button is clicked. Adding a new registration lets you override the default configuration for a specified entity
9. Select a Primary Entity for your rule registration to use

10. Open the Rule Configurations for Step dropdown menu that appears and select the Rule Configuration that you made in Step 6 (For our example, it would be UpdateAccount).



11. Click "Update Step Registration" and verify that the registration successfully saves

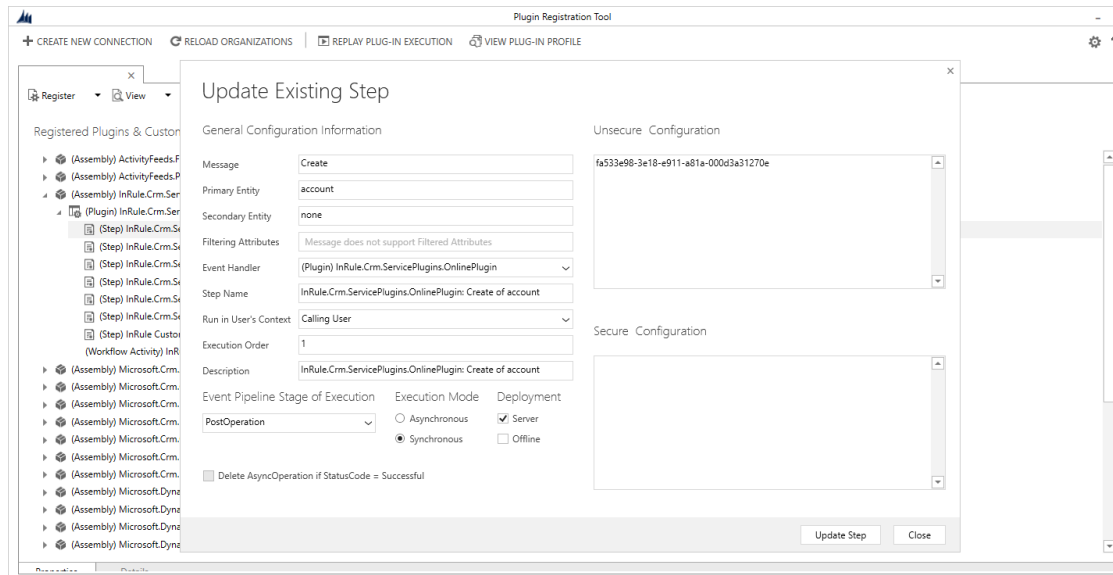


Repeat steps 7 to 10 for all configurations you created in Step 5

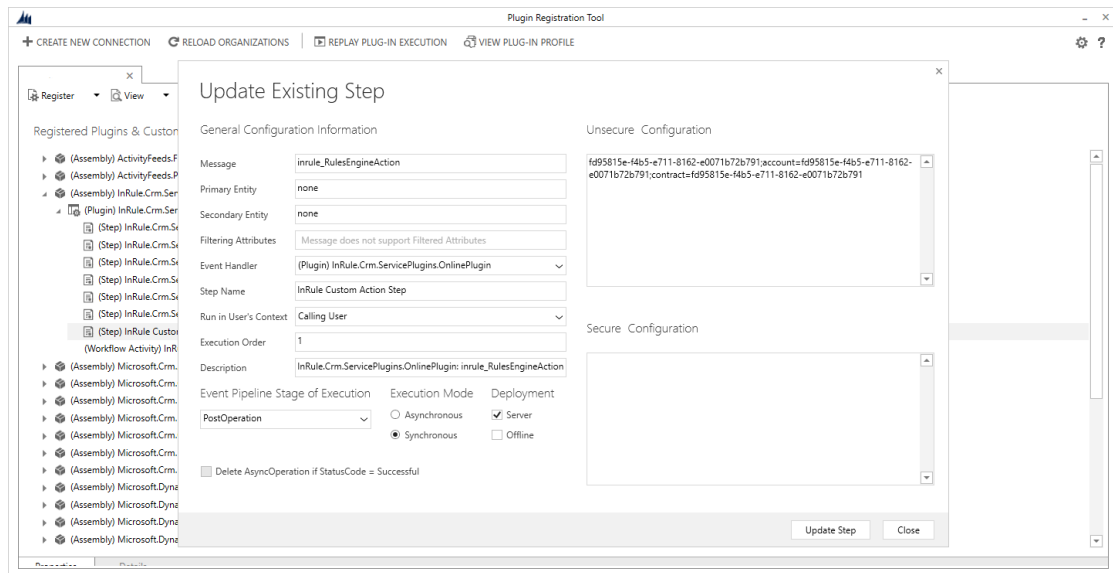


Important: This tool registers all steps to Post Operation stage of execution. If an alternate stage is desired it will need to be modified with the Microsoft Plugin Registration tool linked above and pictured below.

Below is what the Microsoft Plugin Registration Tool looks like. The registration step configuration can be done with either tool. Microsoft's Registration Tool offers additional configuration if needed:



The unsecure configuration field contains the GUID identifier for the associated Rule Configuration. The `inrule_RulesEngineAction` steps are all stored in this configuration field on the InRule Custom Action Step as entity name, ID pairs.



Executing Rules Invoking the InRule Custom Action

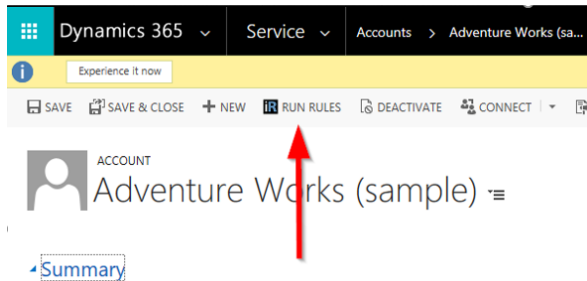
Calling Rules from the Run Rules Button

The Rule Services Solution contains a plugin that has a preregistered step called the InRule Custom Action. The InRule Custom Action allows developers to trigger the execution of rules at arbitrary times by calling into Microsoft Dynamics 365's API.

In addition to providing the InRule Custom Action, the Rule Services Solution contains a web resource named `invokeCustomAction.js` that contains a JavaScript module that encapsulates the complexities of calling into the Microsoft Dynamics 365 API.

The `invokeCustomAction.js` module exposes an `InRule.executeRules()` method that does the work of extracting entity context and form values from within the Microsoft Dynamics 365 Entity Forms UI.

The Rule Services Solution places a 'Run Rules' button on the ribbon of each Dynamics 365 Entity Form, as shown here:



When the Run Rules button is pressed, the `InRule.executeRules()` method defined in `invokeCustomAction.js` is called. This will execute rules against the current entity based on the settings defined in the Rule Services Solution – Rule Configuration Form, described under the section titled An Explanation of InRule Custom Action Options.

The Run Rules button makes it easy for the end user to choose when to execute rules.

An implementer may also choose to write their own JavaScript logic that calls `InRule.executeRules()` explicitly and makes use of alternate options. This can be useful in scenarios where an implementer wants to rules to run automatically based on user interface events that occur in the browser.

Calling Rules from the InRule Workflow Activity

If you need to run rules from a workflow, the solution also provides a custom workflow activity that invokes the same custom action discussed above. It is possible to call a custom action from a workflow without a custom workflow activity, but the InRule Custom Action requires the entity ID, which is not easily obtainable using only the built-in workflow designer. The custom workflow activity passes in the entity ID and type in automatically for you, and provides the rest of the custom action settings as input fields on the activity. The activity also returns the details of the response as individual fields, instead of raw json. These are the fields returned:

- Informational Notifications
- Warning Notifications
- Error Notifications
- Validations
- Errors

When using the custom workflow activity, you can select the option to throw an exception on failure. If you choose to throw an exception on failure, the workflow will end immediately if the custom action fails, and the user will see an error message if they are running the workflow synchronously. If you want to

implement conditional logic to handle failures, you can disable this option and check for the existence of data in the Error return variable to determine if the activity failed.



Important: Before you can use the custom workflow activity, you will need to update the max plugin depth setting for the custom action step to be at least 2, instead of the default value of 1. This is because causing a plugin to be run from a workflow adds 1 to the current plugin depth.

Advantages of Executing Rules through the InRule Custom Action

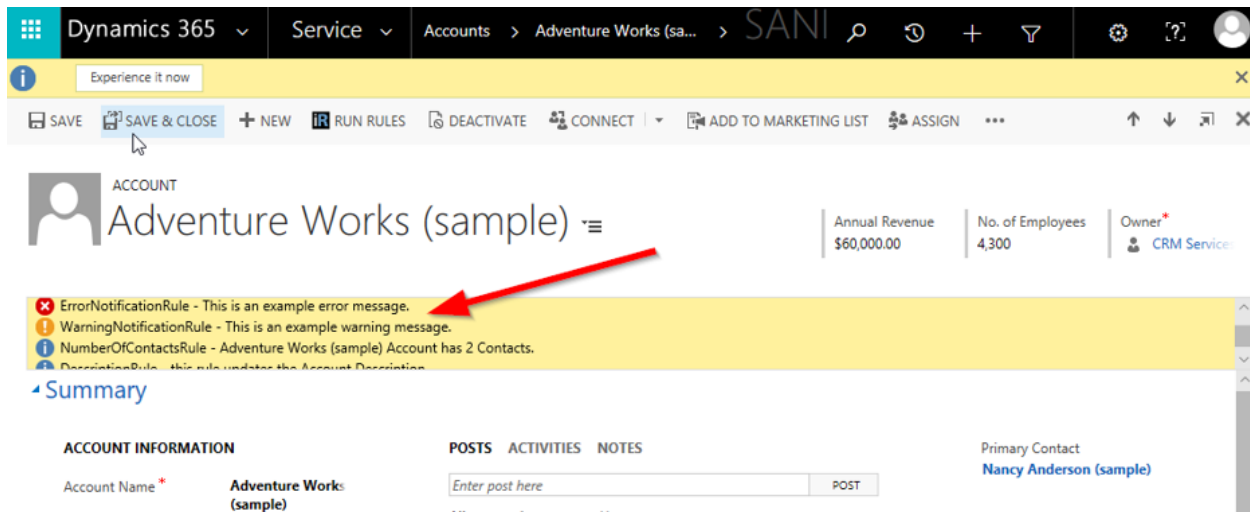
There are three advantages to executing rules through the Custom Action instead of allowing Dynamics 365 to initiate the execution of rules in response to an event.

The End User has Complete Control over when the Rules will execute.

Because the InRule Custom Action needs to be explicitly called, the end user or integration developer has more control over when rules will be executed. In a default implementation, the user will initiate the execution of rules by pressing the 'Run Rules' button found in the UI Ribbon of an Entity Form, however in an advanced implementation, an implementer might wire in a call to execute rules on a form load event or when another action occurs within the UI. This might also be used when rules need to execute when an entity is saved but in such a way that feedback is displayed immediately on the UI form.

The Results of Rule Execution can be utilized by the User Interface

The user interface has access to the results of rule execution; this gives it the ability to display notifications that have been fired as well as any validation errors that may have been identified during the execution of rules.



Rules can be executed against a User Interface's 'dirty data'

The InRule Custom Action can be provided with a form's 'dirty data' to execute rules against. This allows rules to be executed against values that have never been saved into Dynamics 365. A common use-case here is when a RuleApp is used to perform form value validation, or to provide insight into a what-if scenario prior to changes being saved.

Disadvantages to Executing Rules through the InRule Custom Action

There are a few disadvantages to executing rules through the InRule Custom Action.

Changes to entities made through the Dynamics 365 API will not initiate the execution of rules

Because it is the 'Run Rules' button, or custom implementation code that initiates rules, changes made to entities programmatically via the Dynamics 365 API will not be able to trigger the initiation of rule execution.

It is important for an implementer to consider that if they want rules to run every time a create, update, or delete event occurs against an entity, going the InRule Custom Action route will not be an option.

Custom JavaScript required for some advanced scenarios

While you may use the Run Rules button out-of-the-box to manually initiate the execution of rules, if you want to wire the execution of rules in with form events or add any UI customizations, you will need to write custom JavaScript code.

Configuring the *InRule Custom Action* to Initiate Rule Execution

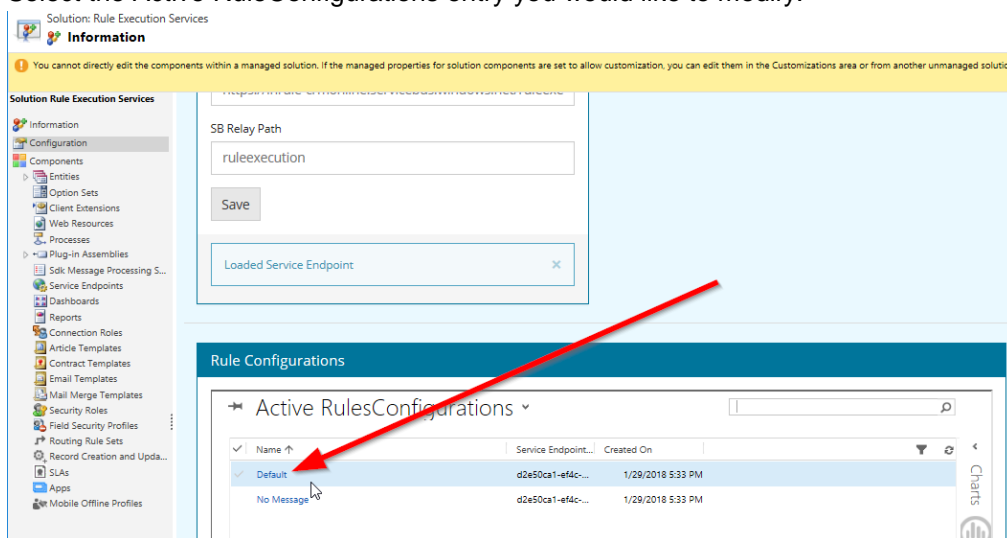
This section contains detailed instructions on how to use the InRule Custom Action to initiate Rule Execution. Actions provide an easy way to trigger functionality in Dynamics and can be invoked using multiple different methods. Registering an action creates a corresponding web API endpoint. This endpoint can be used by external code, or in the case of the 'Run Rules' button, called from JavaScript. Actions can also be called from workflows using either directly with the workflow designer, or through a custom workflow activity.

An Explanation of the InRule Custom Action Options

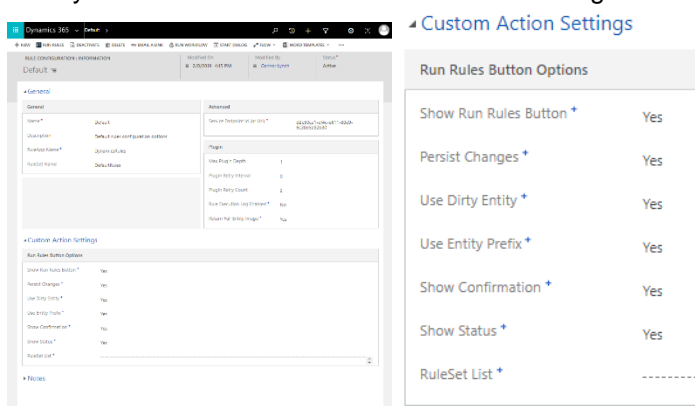
For an explanation of the InRule Custom Action Options, reference the [introduction](#) detailed earlier in this appendix.

Configuring InRule Custom Action options on the Rule Configuration Form

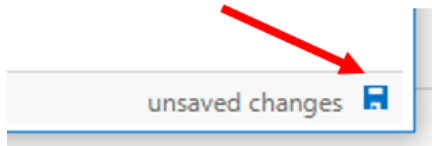
1. Navigate to the Rule Services Solution Rule Configuration Form
2. Select the Active RuleConfigurations entry you would like to modify.



3. Modify the values under the Custom Action Settings section



4. Save the Entity in the bottom right hand corner



Overriding Rule Configuration behavior with user Options and custom JavaScript

The **Run Rules** ribbon button executes the `InRule.executeRules()` method without passing in any parameters. The method will use the configuration defined by the Rule Services Solution – Rule Configuration Form. However, if an implementer chooses to call the `InRule.executeRules()` method from within custom JavaScript code, a `userOptions` object can be passed in that will override the Rule Configuration.

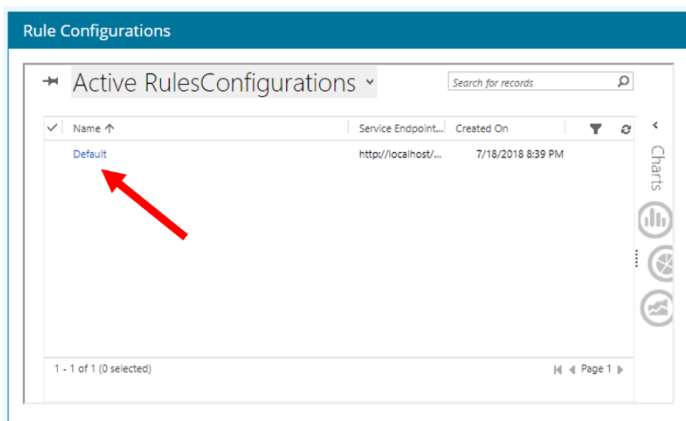
The below JavaScript clip demonstrates how to load up a `userOptions` object with the values preferred, and then pass those options on to `inRule.executeRules(userOptions)`.

```
var formContext = executionContext.getFormContext();
var userOptions = {
    persistChanges: true,
    useDirtyEntity: false,
    entityType: formContext.data.entity.getEntityName(),
    entityId: xpage.data.entity.getId(),
    useEntityPrefix: false,
    showConfirmation: true,
    showStatus: true,
    ruleAppName: "MyRuleApplication",
    ruleSetName: "MyRuleSet"
};
inRule.executeRules(userOptions);
```

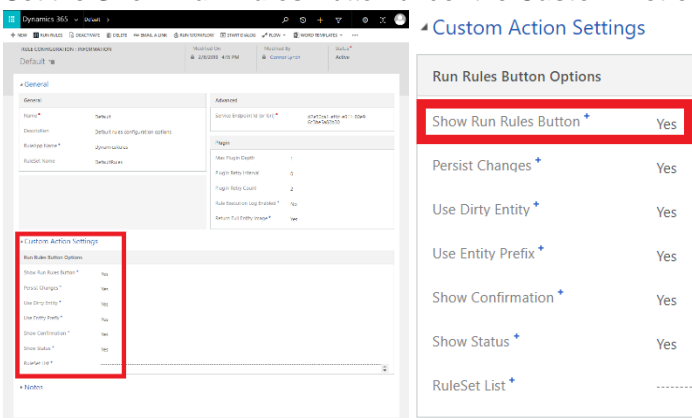
Disabling the InRule Run Rules Button

Out-of-the-box, the Run Rules button is used to manually initiate the execution of rules. In some instances, the Run Rules button may not be needed, and the button can be globally disabled as described below.

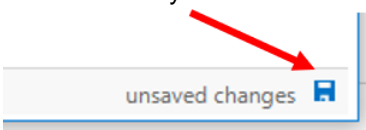
1. Navigate to the Rule Services Solution Rule Configuration Form
2. Scroll down and select the 'Default' record under the 'Rule Configurations' section. Please note that the changes must be made in this specific record or they will not take effect.



- Set the **Show Run Rules Button** under the **Custom Action Settings** section



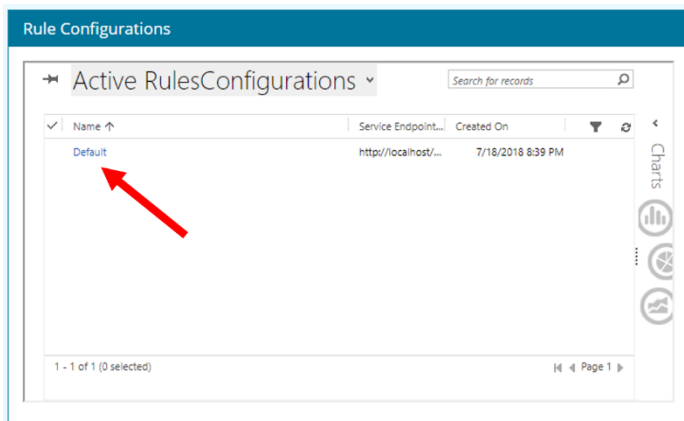
- Save the Entity in the bottom right hand corner



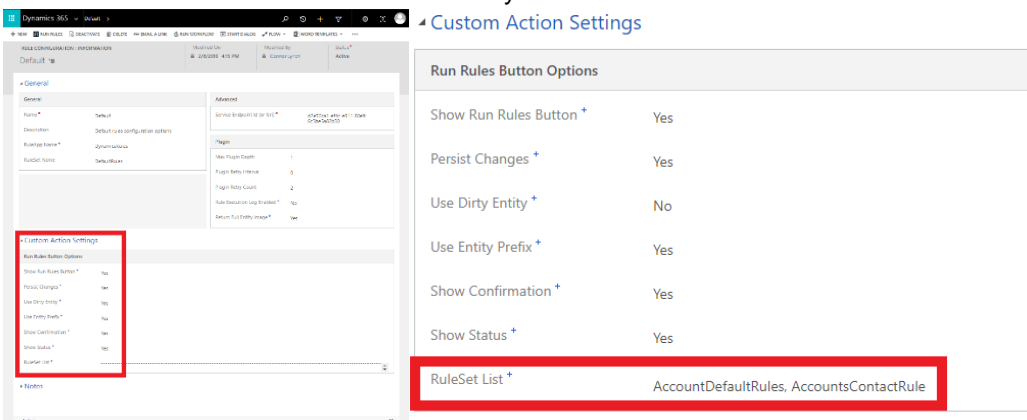
Using the RuleSet List

Out-of-the-box, the Run Rules button is scoped to only run the default rule set that is specified in the configuration file. With this RuleSet List field, you have the option to add a comma separated list of rule sets that may be selected. When this is populated the Run Rules Button will have a dropdown menu added to allow you to select the rule set when running the rule. To enable this functionality, follow the steps below:

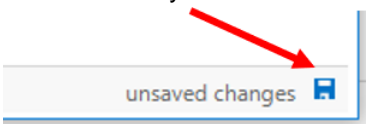
- Navigate to the Rule Services Solution Rule Configuration Form
- Scroll down and select the 'Default' record under the 'Rule Configurations' section. Please note that the changes must be made in this specific record or they will not take effect.



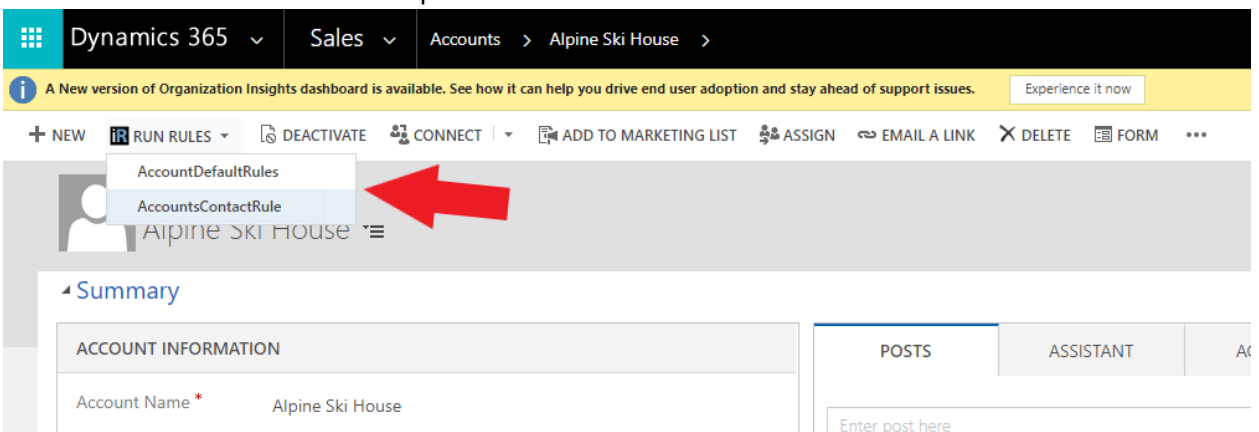
- Fill in the ruleset names that you wish to use in this field. Make sure that they are separated with a comma or the menu will not load correctly.



- Save the Entity in the bottom right hand corner



- Go to the entity page for the configuration that you have just edited and ensure that the Run Rules button now has the desired option sets.



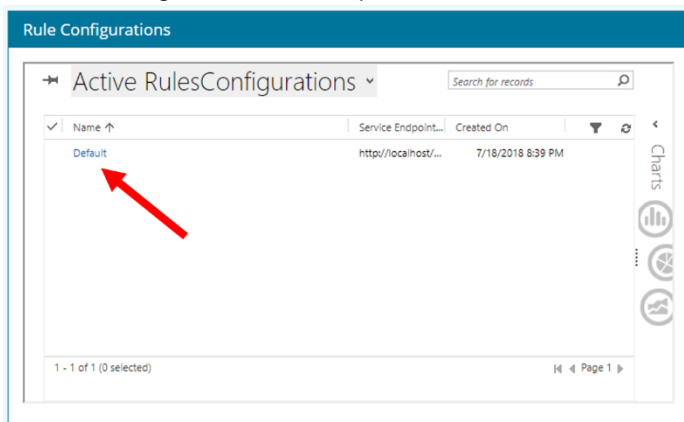
Pattern for Merging Client-Side Changes and Server-Side Data for a Single Rule Request

Dynamics 365 passes data using a data construct called an “Entity Image.” An image represents the data for an Entity instance, but the image may not contain all the Fields that are assigned to that instance.

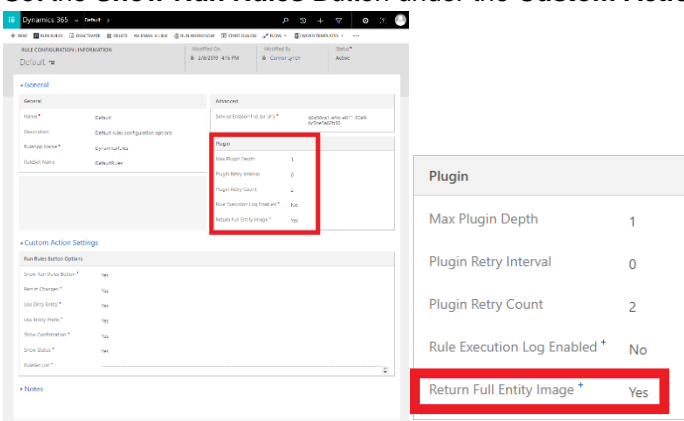
The Entity Image will always be returned containing all the fields passed into the service. Even in the case of Update events, the images passed to integration components will contain the all Fields on the Entity and the updated values for the fields that have actually “changed” from their previously persisted values.

This can be conditionally disabled from the Rule Configuration Form. Doing this will result in no Entity Image being return from the rule service. To disable the entity image, follow the steps below:

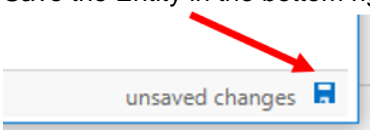
1. Navigate to the Rule Services Solution Rule Configuration Form
2. Scroll down and select the ‘Default’ record under the ‘Rule Configurations’ section. Please note that the change made in this specific record will take effect across the whole system.



6. Set the **Show Run Rules Button** under the **Custom Action Settings** section



7. Save the Entity in the bottom right hand corner



A Dynamics Entity instance is built using an image that is included in the body of an HTTP POST request. This image should be the instance that includes changed Fields. The Entity identifier provided in the image is used to query the latest complete server-side version of the Entity and this version of the entity is merged with the passed “changes” image before passing the Entities to the rule engine.



Important: If no “changes” image data is provided, then only the server-loaded image of the data is used. The merge operation is skipped if the “changes” image is null.



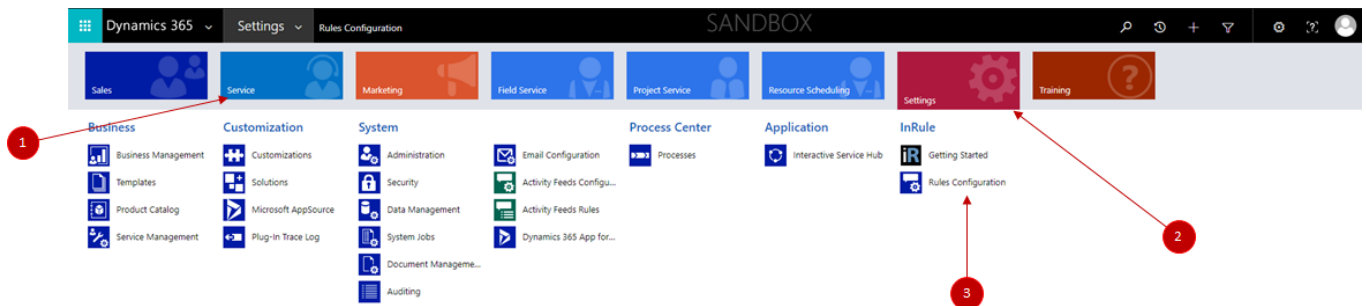
Important: During “inserts” of new records into Dynamics, there will be no server-side data available. The merge pattern is still available to be used for this case, but the server-side data will always be null.

Appendix F: Rules Configuration and Settings

The *Rule Services Solution – Rule Configurations Form* provides a central location where you can configure the Plug-in provided by the solution. Some of the tasks that you can perform using this form include:

- Change the properties of the default 'Rule Configurations' entry.
- Establish multiple 'Rule Configurations' each which can be associated with different steps.
- Choose the RuleApp Name that will be executed with a given Rule Configuration
- Choose the RuleSet Name that will be executed with a given Rule Configuration
- Choose the Service Endpoint that will be used to contact the *InRule Rule Execution App Service for Dynamics 365*
- Setting the maximum plugin execution depth
- Choose the retry interval and retry counts
- Choose what options will be used by default from the InRule Custom Action JavaScript module to the *Rule Configuration Form*

Drop down the chevron next to the first menu item after Dynamics 365, Select Settings, Select Rules Configurations under the InRule heading.

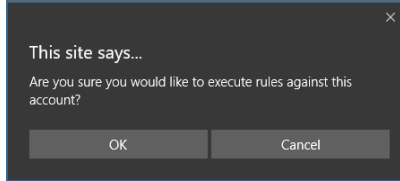
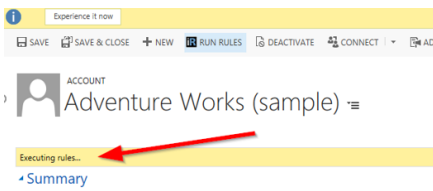
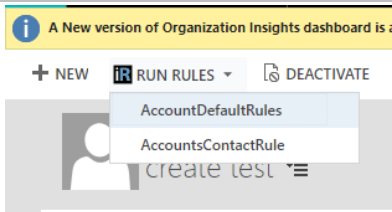


An Explanation of the InRule Custom Action Options

The below options must be passed into the InRule Custom Action. InvokeCustomAction.js exposes InRule.executeRules() which will use values defined in the Rule Services Solution – Configuration Form. Alternatively, a consumer of InRule.executeRules() can pass in an object that provides specific values that should be used on a call by call basis

Custom Action Settings

| Run Rules Button Options | |
|------------------------------------|-------|
| Show Run Rules Button ⁺ | Yes |
| Persist Changes ⁺ | Yes |
| Use Dirty Entity ⁺ | Yes |
| Use Entity Prefix ⁺ | Yes |
| Show Confirmation ⁺ | Yes |
| Show Status ⁺ | Yes |
| RuleSet List ⁺ | ----- |

| | |
|------------------------------|---|
| Show Run Rules Button | <p>If true, then the <i>Inrule Run Rules Button</i> will be visible on all pages.</p> <p>If false, then the <i>InRule Run Rules Button</i> will be globally removed. This will only effect the the use of the button, but not other registered plugin steps.</p> |
| PersistChanges | <p>If true, changes made to all entities by InRule are persisted back to Dynamics.</p> <p>If false, any changes made by InRule are sent back in the response and can be consumed by the caller, but they are not persisted back to Dynamics.</p> |
| UseDirtyEntity | <p>If true, the InRule Custom Action will expect that form data will be included in the API call. The form data is used to populate the root entity in the Rule Engine. This is useful in scenarios when data has changed on the Dynamics form but the save button has not yet been pressed. This allows a user to run rules against data before a save takes place.</p> <p>If false, the only data passed to the Custom Action is the Entity ID (guid) of the entity, and the Custom Action will query Dynamics directly for that entities data. This limits the InRule Custom Action to being aware only of data that has been fully saved to Dynamics.</p> |
| UseEntityPrefix | <p>If true, then the supplied <i>RuleSetName</i> is interpreted as a suffix to the <i>EntityType</i> Name. For example: if the supplied <i>RuleSetName</i> is "DefaultRules" and the <i>EntityType</i> Name you are dealing with is "Account", then the <i>RuleSetName</i> actually used will be "AccountDefaultRules".</p> <p>If false, then the supplied <i>RuleSetName</i> is interpreted literally.</p> |
| ShowConfirmation | <p>If true, this will ask the user in the User Interface with the following visual prompt before actually executing rules:</p>  |
| ShowStatus | <p>If true, a status messages will be displayed within the Dynamics interface when rules are executing, when rules are finished, and if rules are cancelled by the confirmation dialog.</p>  |
| RuleSet List | <p>This is a free form text box that allows for you to specify a list of rule set names that can be run with the particular rule set configuration. When this is populated, the default Rule Set Name will be ignored and these options will be populated into a dropdown on the run rules button.</p>  |

Appendix G: Azure App Service Plan Configuration

Azure App Service Plan Overview

The Dynamics Rule Execution Azure App Service service runs on an Azure App Service Plan. The ARM Template deployment process outlined in [Section 3.3.3: Rule Execution App Service for Dynamics 365](#) will, by default, automatically deploy an App Service Plan for you.

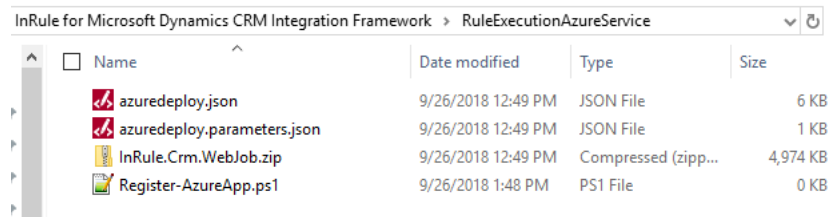
This App Service Plan will be deployed to the subscription and resource group provided during the deployment process. Additionally, the plan will be configured with a “B1” (Basic, Small) pricing tier. This is the **lowest** tier possible for the Rule Execution App Service to run in, as it is the lowest tier that allows running in **Always On** mode. **Always On** is required to permit a continuous web job to run on the app service. Thus, regardless of whether or not you opt to allow the ARM template to create an App Service Plan for you, or use a pre-existing one, the plan must, at a minimum, be of the “B1” tier or higher.

Should you wish to use a pre-existing Azure App Service Plan rather than have a new one created for you, a few configuration steps within the ARM template itself are necessary.

Configuring the ARM Template to Use an Existing Azure App Service

1: Locate azuredeploy.parameters.json

The ARM template parameters file is located in the *RuleExecutionAzureService* folder as, defined in [Section 3.3.3: Rule Execution App Service for Dynamics 365](#)



| Name | Date modified | Type | Size |
|-----------------------------|--------------------|-----------------------|----------|
| azuredeploy.json | 9/26/2018 12:49 PM | JSON File | 6 KB |
| azuredeploy.parameters.json | 9/26/2018 12:49 PM | JSON File | 1 KB |
| InRule.Crm.WebJob.zip | 9/26/2018 12:49 PM | Compressed (zip) File | 4,974 KB |
| Register-AzureApp.ps1 | 9/26/2018 1:48 PM | PS1 File | 0 KB |

2: Create “createAppServicePlan” parameter

Open the file in your text editor of choice. Find the “crmConnectionString” parameter at the end of the file. You will add an additional parameter called “createAppServicePlan” Detailed below (Note, be sure to add the pictured comma immediately following the first bracket after the “crmConnectionString” parameter):

```

29  "crmConnectionString": {
30    "value": ""
31  },
32  "createAppServicePlan": {
33    "value": false
34  }
35  }
36  }
```

3: Create “appServicePlanName” parameter

Next, we need to make a pair of parameters to inform the ARM template where to host the app service itself, now that we are no longer creating a plan for it to run on. First, create the “**appServicePlanName**” parameter directly below the “createAppServicePlan” parameter you just made in the step above. Define the parameter as detailed below and set the value equal to **the name of your app service plan**.

```
32  "createAppServicePlan":{  
33    "value": false  
34  },  
35  "appServicePlanName":{  
36    "value": "Your App Service Plan Name Here"  
37  },
```

4: Create “servicePlanResourceGroupName” parameter

Lastly, we need to add a parameter to inform the ARM template what resource group your App Service Plan is in. Create the “servicePlanResourceGroupName” parameter as shown below and define the value as **the name of the resource group your App Service Plan exists in**.

```
35  "appServicePlanName":{  
36    "value": "Your App Service Plan Name Here"  
37  },  
38  "servicePlanResourceGroupName":{  
39    "value": "Your Resource Group Name Here"  
40  },
```

5: Save azuredeploy.parameters.json and continue deployment

Save and close the file. You can now proceed with the deployment process outlined in [Section 3.3.3: Rule Execution App Service for Dynamics 365](#) as normal; your rule execution app service will now deploy to the App Service Plan you defined in the steps above

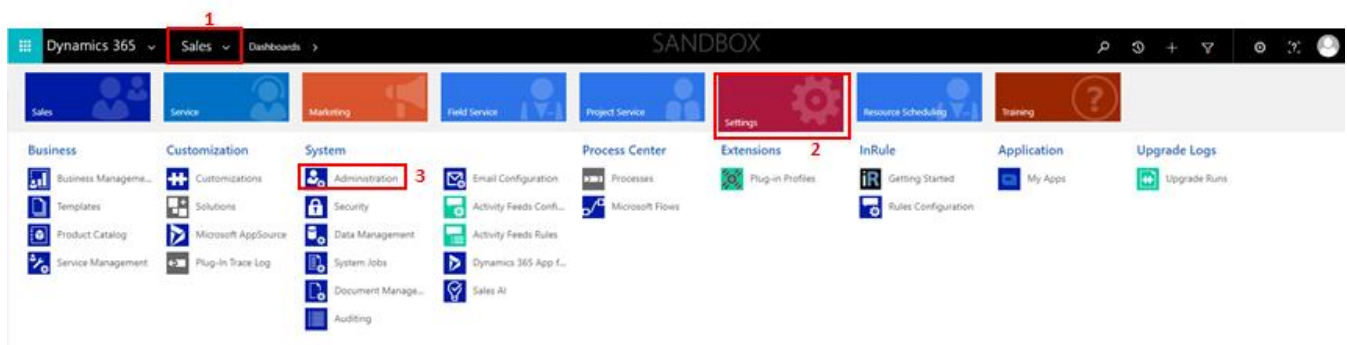
Appendix H: Dynamics 365 Tracing and InRule Event Logging

Dynamics 365 Plug-In Trace Logging

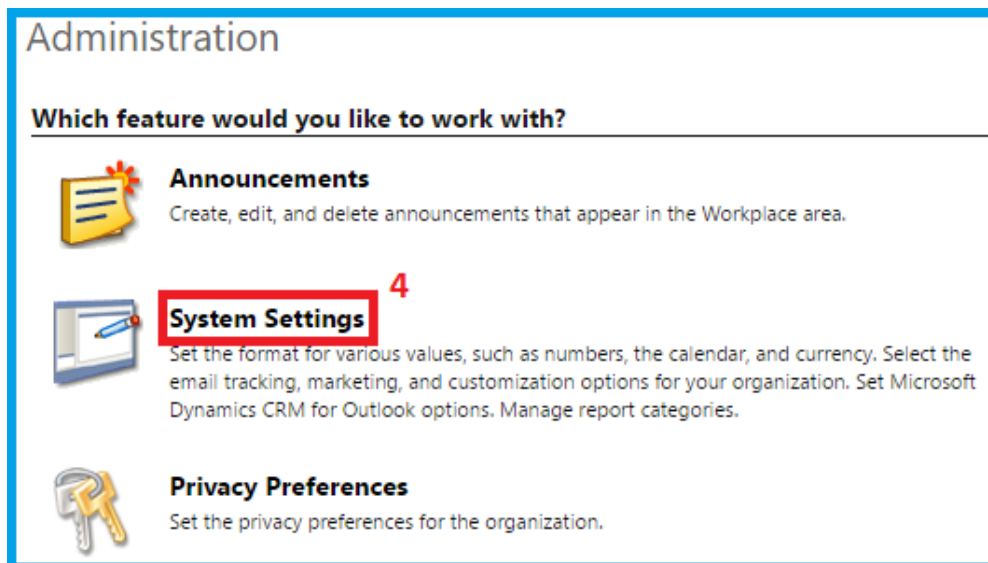
The Dynamics Plug-In Trace Log feature is a debugging tool made available within Dynamics itself for reviewing plugin events and exceptions. This section will highlight how to enable this feature within Dynamics and how to utilize it. Currently, Plug-In Trace Logs only work with the Execution Service in online deployments. For more detail on the limitations of on-prem deployments, reference [Appendix J: Known Issues, Limitations and Troubleshooting](#).

Enable Plug-In Trace Log

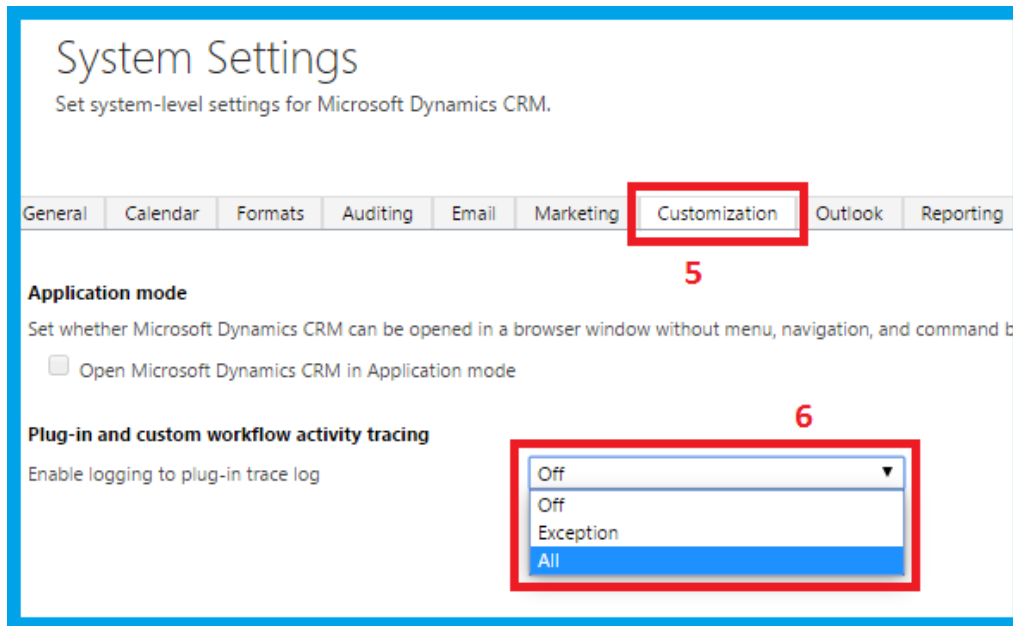
To enable the Plug-in Trace Log, first navigate to **Settings > Administration**.



Once you're in the Administration section, click on **System Settings**.

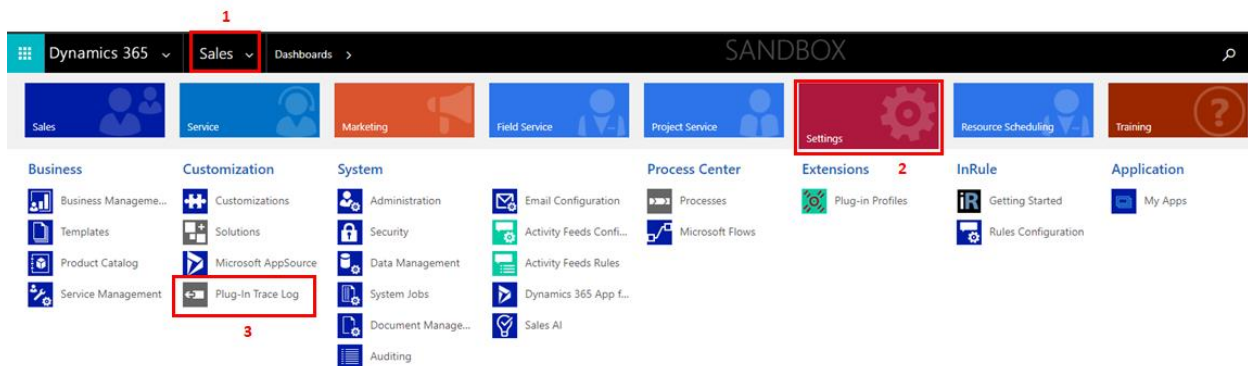


From here you can navigate to the **Customization** tab and select **All** for the **Enable logging to plug-in trace log** field. Then click **OK**. This will create trace logs for all plugin events within your Dynamics environment. In the context of InRule, this includes Create, Update, and Custom Action events.





Viewing Plug-In Trace Log

To review Plug-In Trace Logs after they have been enabled, navigate to **Settings > Plug-in Trace Log**.



Here, there will be a list populated with all logged plugin events. If you do not see a list of logs in a similar fashion as below, that means no plugin events have been logged.

|  |  | More Actions ▾ | | | |
|---|---|-----------------|-----------------------------------|--------------------------|------------------------|
| <input type="checkbox"/> | System Creat... | Operation Ty... | Type Name | Message Name | Execution Start Time ↓ |
| | Yes | Plug-in | InRule.Crm.ServicePlugins.Onli... | inrule_RulesEngineAction | 1/21/2019 12:53 PM |
| | Yes | Plug-in | InRule.Crm.ServicePlugins.Onli... | inrule_RulesEngineAction | 1/21/2019 12:52 PM |
| | Yes | Plug-in | InRule.Crm.ServicePlugins.Onli... | inrule_RulesEngineAction | 1/21/2019 12:52 PM |
| | Yes | Plug-in | InRule.Crm.ServicePlugins.Onli... | inrule_RulesEngineAction | 1/21/2019 12:52 PM |
| | Yes | Plug-in | InRule.Crm.ServicePlugins.Onli... | inrule_RulesEngineAction | 1/21/2019 12:11 PM |
| | Yes | Plug-in | InRule.Crm.ServicePlugins.Onli... | inrule_RulesEngineAction | 1/21/2019 12:10 PM |
| | Yes | Plug-in | InRule.Crm.ServicePlugins.Onli... | inrule_RulesEngineAction | 1/21/2019 12:10 PM |
| | Yes | Plug-in | InRule.Crm.ServicePlugins.Onli... | inrule_RulesEngineAction | 1/21/2019 12:10 PM |

For this example, we will view the resulting log of executing a Custom Action from manually running rules. To view a specific log, simply click on the hyperlinked **Type Name** text.

The first section within a specific trace log is the Configuration section, which details the various configuration details about the event, including the Rule Configuration ID used, the event type, the plugin step ID, and more. This section can be useful for debugging by providing a quick means of determining whether or not the rules executed were properly configured.

Configuration

| General | | | |
|-----------------|--|----------------------|-------------------------------------|
| System Created | Yes | | |
| Type Name | InRule.Crm.ServicePlugins.OnlinePlugin | | |
| Message Name | inrule_RulesEngineAction | Primary Entity | none |
| Configuration | fd95815e-f4b5-e711-8162-e0071b72b791 | Secure Configuration | -- |
| Persistence Key | 00000000-0000-0000-0000-000000000000 | Operation Type | Plug-in |
| Plugin Step Id | 070ad2c4-ae70-e711-811a-e0071b6a6141 | | |
| Context | | | |
| Depth | 1 | Mode | Synchronous |
| Correlation Id | d3b2ce70-4af3-4fd7-a8fb-0a38792ef397 | Request Id | 4eae987f-1be5-467f-b5f5-cff3942fbae |

The second section, the Execution section, is typically the most useful for debugging. It will provide a block of all messages logged by the plugin during its execution, as well as any exception details, if the event resulted in an exception.

| | | | |
|----------------------|--|-------------------------|--------|
| Execution Start Time | 1/21/2019 1:51 PM | Execution Duration (ms) | 26,341 |
| Message Block | Original Input parameters: Parameter name: entityId, Value: {E1F7327C-9D1A-E911-A82C-000D3A31299D} Parameter name: entityType, Value: contact | | |
| Exception Details | Unhandled exception: Exception type: System.ServiceModel.FaultException`1[Microsoft.Xrm.Sdk.OrganizationServiceFault] Message: An unexpected error occurred from ISV code. (ErrorType = ClientError) Unexpected exception from plug-in (Execute): InRule not set to an instance of an object.Detail: <OrganizationServiceFault xmlns:i="http://www.w3.org/2001/XMLSchema-instance" xmlns="http://schemas.microsoft.com/xrm/2011"> <ActivityId>2a4757b4-fe60-44a6-97d4-45543c322b93</ActivityId> <ErrorCode>-2147220956</ErrorCode> <ErrorDetails xmlns:d2p1="http://schemas.datacontract.org/2004/07/System.Collections.Generic"/> <Message>An unexpected error occurred from ISV code. (ErrorType = ClientError) Unexpected exception from plug-in (Execute): InRule not set to an instance of an object.</Message> <Timestamp>2019-01-21T19:51:39.3705065Z</Timestamp> <ExceptionRetriable>>false</ExceptionRetriable> <ExceptionSource>PluginExecution</ExceptionSource> <InnerFault i:nil="true"/> <OriginalException>System.NullReferenceException at InRule.Crm.ServicePlugins.OnlinePlugin.Execute(IServiceProvider serviceProvider) at Microsoft.Crm.Sandbox.SandboxAppDomainHelper.<__DisplayClass14_3.>Execute(b__0) --- End of stack trace from previous location where exception was thrown --- at System.Runtime.ExceptionServices.ExceptionDispatchInfo.Throw() at Microsoft.Crm.Sandbox.SandboxAppDomainHelper.Execute(IOrganizationServiceFactory organizationServiceFactory, Dictionary`2 pluginSecureConfig, IPluginExecutionContext requestContext, Boolean enablePluginStackTrace, Boolean chaosFailAppDomain) at Microsoft.Crm.Sandbox.SandboxAppDomainHelper.Execute(IOrganizationServiceFactory organizationServiceFactory, Dictionary`2 pluginSecureConfig, IPluginExecutionContext requestContext, Boolean enablePluginStackTrace, Boolean chaosFailAppDomain) at Microsoft.Crm.Sandbox.SandboxWorker.Execute(SandboxCallInfo callInfo, SandboxPluginExecutionContext requestContext, Guid pluginTypeName, String pluginConfiguration, String pluginSecureConfig, SandboxRequestCounter& workerCounter, Boolean r <TraceText> Entered InRule.Crm.ServicePlugins.OnlinePlugin.Execute() Plugin context retrieved. Message is inrule_RulesEngineAction Loading configuration entity with ID 133ca426-9d1a-e911-a82c-000d3a31299d | | |

The message block logs rule execution “milestones.” In the event that the plugin fails to execute properly, the message block is useful for determining at what point it is failing. The Exception Details block will provide any related details to any exception thrown and is generally the first place to look to diagnose the nature of a plugin execution failure.

Rule Execution Service Event Log

Event logging can be enabled in the Rule Execution App Service to monitor application events. These logs can be tremendously useful for debugging any issues encountered with the Rule Execution Service.

Viewing Application Event Logs

To enable event logging, login to Azure and navigate to your App Service as created as a part of the Azure deployment process detailed in [Section 3.3.3: Rule Execution App Service for Dynamics](#).

Once you're looking at the overview of your app service, select **Diagnose and solve problems**

The screenshot shows the Azure App Service overview page for a service named 'IntegrationsTeam'. At the top, there are action buttons: Browse, Stop, Swap, Restart, Delete, Get publish profile, and Reset publish profile. Below these, the resource group is 'IntegrationsTeam', status is 'Running', location is 'North Central US', subscription is 'Engineering-DevTest', and subscription ID is 'cf3242e8-7c98-4b60-a714-3be7b91c5df1'. On the right, the URL is 'https://cmmirint-webjob.azurewebsites.net', app service plan is 'cmmirint-webjobPlan (Basic: 1 Small)', and deployment details are listed. Below the overview, there are three main sections: 'Diagnose and solve problems' (highlighted with a red box), 'Application Insights', and 'App Service Advisor'. The 'Diagnose and solve problems' section includes a wrench icon and text: 'Our self-service diagnostic and troubleshooting experience helps you identify and resolve issues with your web app.'

Select Diagnostic Tools

App Service Diagnostics

Use App Service Diagnostics to investigate how your app is performing, diagnose issues, and discover how to improve your application. Select the problem category that best matches the information or tool that you're interested in:

The screenshot shows the 'App Service Diagnostics' page with several categories of diagnostic tools. The 'Diagnostic Tools' category is highlighted with a red box. The categories and their descriptions are:

- Availability and Performance**: Is your app experiencing downtime or slowness? Click here to run a health checkup to discover issues that may affect your app's high availability, by either platform or app issues. Keywords: Health Check, Downtime, Six Errors, 4xx Errors, CPU, Memory.
- Configuration and Management**: Are you having issues with something that you configured specifically for your app? Find out if you misconfigured App Service features, such as backups, deployment slots, and scaling. Keywords: Scaling, Swaps, Failed Backups, IPs, Migration.
- SSL and Domains**: Having trouble with certificates and custom domains? Discover any issues related to SSL certificates, authentication, and domain management. Keywords: 4xx Errors, SSL, Domains, Permissions, Auth, Cert.
- Best Practices**: Are you running your application in production? Review best practice recommendations to best ensure that you running your production application with the optimal configurations and suggestions. Keywords: AutoScale, Traffic Manager, AlwaysOn, ARR Affinity.
- Diagnostic Tools** (highlighted): Sometimes deeper investigation is necessary. With Diagnostic Tools, you can run language-specific tools to profile your app, collect network traces, memory dumps, and more. Keywords: Profiler, Memory Dump, DaaS, AutoHeal, Metrics, Security.

Select Application Events

App Service Diagnostics Tools and Resources

ASP.NET | ASP.NET Core | Java | PHP

Sometimes deeper investigation is necessary. With Diagnostic Tools, you can run language-specific tools to profile your app, collect network traces, memory dumps, and more.

🔍 The stack used by your Web App was automatically detected to be **Static Only**. If incorrect, please select the correct option on the right.

- Diagnostic Tools



- Support Tools



- Premium Tools



You should see a list of all application events logged by the rule execution service, denoted with the notification level, timestamp, event ID, source and web server. Selected an event log will cause the log details to appear in a separate column on the right-hand side of screen.

| Level | Date Time ▲ | Event Id | Source | Computer |
|-------|---------------------|----------|---------------------|----------------|
| Level | Date Tim | Event I | Source | Computer |
| Info | 01/21/2019 20:12:13 | 2000 | HttpPlatformHandler | RD00155D70EBC2 |
| Info | 01/21/2019 20:12:13 | 2000 | HttpPlatformHandler | RD00155D70EBC2 |
| Info | 01/21/2019 20:12:12 | 2000 | HttpPlatformHandler | RD00155D70EBC2 |

Recycling application MACHINE/WEBROOT/APPHOST/~

In the event of rule service issues, error events in this log stream can be useful for debugging purposes. For example, below is an example of an error event log in an instance where the rule service contacting the catalog looking for a rule application that didn't exist:


```
Time: 10/30/2018 7:19:54.872 PM, Source: WcfCatalogProxy, Message:
Rule application 'DynamicsRules2' does not exist in the catalog.
Installer Version: 5.2.0.166
irSDK Version: 5.2.0.166
HostAppDomainHeapMemoryMB: 18
, Detail:

Operating System: Microsoft Windows NT 10.0.14393.0
Processor Count: 1
CLR Version: 4.0.30319.42000
CLR Mode: 32-bit
Thread Culture: 1033
ThreadID: 15
ProcessID: 0
Installer Version: 5.2.0.166
irSDK Version: 5.2.0.166

Error Information:
InRule.Repository.Service.InRuleCatalogException: Rule application 'DynamicsRules2' does not exist in
the catalog.
```

Typically, the response message at the beginning of the log and the Error Information section provide the most pertinent debugging information.

Adjusting Logging Levels

The Application Event Log can quickly become bogged down with too many logs, making finding specific logs that you may be interested in more difficult. To cut down on excessive informational logs, the Rule Execution Service, by default, will be deployed with a logging level of “Warn,” meaning only Warnings and Errors will be logged. However, this can be adjusted as needed for whatever your needs may be.

To adjust your Rule Execution Service’s logging level, navigate to your App Service as created as a part of the Azure deployment process detailed in [Section 3.3.3: Rule Execution App Service for Dynamics](#).

Once you’re looking at the overview of your app service, select **Application Settings** in the settings menu:

The screenshot displays the Azure Portal interface for a web application. On the left, the 'Settings' menu is visible, with 'Application settings' highlighted. The main content area shows the 'Overview' tab, displaying details such as Resource group (IntegrationsTeam), Status (Running), Location (North Central US), Subscription (Engineering-DevTest), and Subscription ID (cf3242e8-7c98-4b60-a714-3be7b91c5df1). Below this, there are tags for Billing, CreatedBy, CreationDate, Department, and Project. At the bottom, there are three tiles: 'Diagnose and solve problems', 'Application Insights', and 'App Service Advisor'.

Scroll down until you see the **Application settings** section:

Application settings

i Application Settings are encrypted at rest and transmitted over an encrypted channel. You can choose to display them in plain text in your browser by using the controls below.

Hide Values Show Values

| APP SETTING NAME | VALUE | SLOT SETTING | DELETE |
|---|------------------------------|--------------------------|--------|
| inrule:crm:catalog:label | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:crm:catalog:password | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:crm:catalog:ruleAppDirectory | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:crm:catalog:sso | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:crm:catalog:uri | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:crm:catalog:useInRuleCatalog | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:crm:catalog:user | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:crms2s:azureAppId | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:crms2s:azureAppSecret | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:crms2s:crmOrgUri | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:crms:serviceBus:key | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:crms:serviceBus:namespace | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:crms:serviceBus:owner | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:crms:serviceBus:path | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:logging:level | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |
| inrule:repository:licensing:licenseFolder | Hidden value. Click to edit. | <input type="checkbox"/> | ✕ |

[+ Add new setting](#)

Locate the **inrule:logging:level** setting. Note that its value is currently set to “Warn.”


inrule:logging:level Warn


Simply change the value to the desired logging level. You may select from one of the following levels that the Rule Execution Service leverages:

| Logging Level | Details |
|---------------|--|
| Info | Logs all application events, including Informational events that track the general flow of the application |
| Warn | Logs Warning and Error events. Warning events highlight abnormal or unexpected events in the application flow, but don't otherwise cause application execution to stop |
| Error | Logs only Error events. Error events result in the halted execution of the application's current activity due to a failure |

For more detailed, technical explanations of what is included with each logging level, please reference the [Runtime Event Log Details documentation on the support site.](#)

Once you have configured the setting to the desired to level, press Save at the top of the page:

 Save

 Discard


Remote debugging

OffOn

Remote Visual Studio version

20152017

Application settings

 Application Settings are encrypted at rest and transmitted over an encrypted channel. You

Hide Values

Show Values

| APP SETTING NAME | VALUE |
|-----------------------------|------------------------------|
| inrule:crm:catalog:label | Hidden value. Click to edit. |
| inrule:crm:catalog:password | Hidden value. Click to edit. |

Appendix I: Activating Your License Keys

Whether you're deploying the Online or On-Prem solution will determine the appropriate method for activating your InRule licenses. For Online installations, you will have an Azure license file provided to you by InRule which will be deployed to your Azure app service via FTP. This process is detailed in the [Performing the Installation: In Azure section](#).

For On-Prem, you will leverage the InRule License Activation Utility and follow the walkthrough below.

1: Download the license activation utility:

Download and install the InRule Activation Utility from support.inrule.com on the server where you intend to deploy the InRule Execution Service.

2: Run the Activation Utility:

Run the activation utility as an Administrator to install Event Log Source.

InRule License Activation Utility 5.1.0

InRule Technology, Inc.
License Activation Utility

☐ I don't have an internet connection ⓘ

Activated Licenses

There are no activated products on this machine. ⓘ

Activate Licenses

Name:*

Organization:

License Key(s): ⓘ
For one or more inactive products: irServer®, irSDK®, irAuthor®, irCatalog®, InRule® for Microsoft Dynamics® CRM, InRule® for the Salesforce® Platform

XXXX-XXXX-XXXXXX-XXXXXX-XXXXXX-XXXXXX
XXXX-XXXX-XXXXXX-XXXXXX-XXXXXX-XXXXXX
XXXX-XXXX-XXXXXX-XXXXXX-XXXXXX-XXXXXX

Activate ⓘ

Event Log Source

Uninstall ⓘ

| | | | |
|--------------------------|----------------------------------|-----------|--|
| CRM2016-INT (1 cores) | irServer®/irSDK® (v5.1.0.150) | 7/19/2018 | |
|--------------------------|----------------------------------|-----------|--|

4: Enter your name, organization name and license keys into the Activation Utility:

Enter your name, organization and the relevant license keys into the Activation Utility and press Activate

InRule License Activation Utility 5.1.0

InRule Technology, Inc.
License Activation Utility

☐ I don't have an internet connection ⓘ

Activated Licenses

| License Key | Expiration Date |
|-------------|-----------------|
| [Redacted] | [Redacted] |
| [Redacted] | [Redacted] |

Reactivate ⓘ Deactivate ⓘ

Activate Licenses

Name:
Your Name Here

Organization:
Your Org Here

License Key(s): * ⓘ
For one or more inactive products: InRule® for the Salesforce® Platform

License Key 1 Here
License Key 2 Here
etc.

Activate ⓘ

Event Log Source

Uninstall ⓘ

5: Verify your license keys have activated:

InRule License Activation Utility 5.1.0

InRule Technology, Inc.
License Activation Utility

☐ I don't have an internet connection ⓘ

Activated Licenses

| License Key | Expiration Date |
|-------------|-----------------|
| [Redacted] | [Redacted] |
| [Redacted] | [Redacted] |

Reactivate ⓘ Deactivate ⓘ

Appendix J: Known Issues, Limitations and Troubleshooting

This portion of the document lists current known issues and limitations that may be encountered in usage of the Integration Framework. Most should only be encountered in limited edge cases.

- v5.3.0 of the Dynamics Integration Framework is only compatible with Dynamics v9.0 for both online and on-prem
- To deploy to a v8.2 Dynamics environment, view [Section 4.3.4](#) of this deployment guide.
- In some cases, the rule helper can return nested entities from a query, which may cause performance issues.
- Status cannot be set as part of a rule app. The status field can be added to the entity schema in a rule app and can be read as part of executing a rule, but this value cannot be set by a rule.

Connections

Support for Connections is currently limited. You can bring in the Connection entity relationship through irX as well as write rules against the Connection entity, however, the ability to write rules against the Connected entity itself through the Connection relationship is not supported. For example, if you have an Account Connected to a Contact, you can write rules against the Connection entity itself and do things like change the Role, Role Type, or other fields on the Connection entity, however, you will not be able to write rules against the Contact entity. The Connection entity sits between the two Connected entities (in this case Account and Contact) and contains all the Connection metadata describing the Connection.

On-Prem Execution Mode

Running the plugin in an On-Prem Dynamics environment requires running outside of Sandbox mode. Plugins in sandbox isolation mode run under partial trust, which prevents plugins from doing things like accessing the file system and registry. This prevents the execution service from logging to Dynamics' plugin trace logs. This also prevents reflection from being used, which is necessary for serializing Dynamics classes for communication over WCF. When using service endpoints to communicate with Azure Service Bus, Dynamics provides helper classes that handle this serialization, but no such classes are provided for On-Prem communication.

1-Minute Timeout

Because of Dynamics default configuration, a 1-Minute Timeout may occur when a request to the Azure Service Bus takes longer than a minute to respond. This can occur because of latency between Dynamics and the rule execution service, or anything else that causes the rule execution service to take more than 1 minute to respond.

2-Minute Timeout

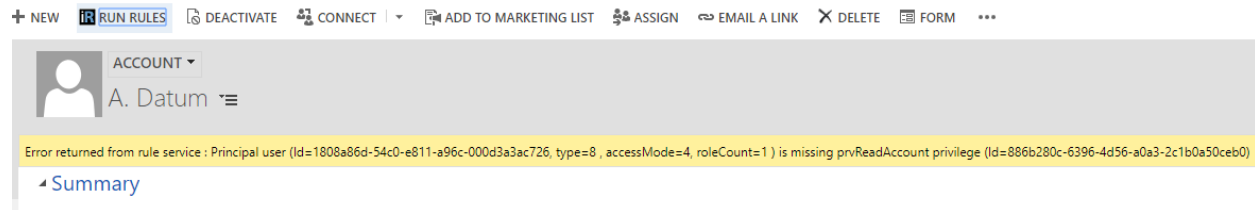
Dynamics plugin execution is configured to timeout when the plugin runs for more than two minutes. In online implementations there is nothing that can be done about this behavior because the plugin cannot be taken out of sandbox mode. Since On-Prem implementations must be run outside of sandbox mode, this timeout period can be changed by updating the configuration.

S2S User Settings

If the 'InRule Integration' user is being used with the associated 'InRule Integration Administrator' role, the entity permissions are not updated after the initial creation. If a new entity type is created, it will not automatically be added to this security role and will have to be added manually. This user account can be assigned to the 'System Administrator' role to alleviate the stale permission issue, as it is automatically updated with permission when new entities are created.

Missing Entity Privilege Error

If, after attempting to run rules, you see an error like the one below, make sure that the 'InRule Integration' user has been assigned the 'InRule Integration Administrator' role, and that the role has the permissions needed to access any entities necessary.



Common Troubleshooting Items

- When deploying the Azure WCF Relay (aka Azure Service Bus), you will need to ensure the Azure subscription you are deploying the Relay into has the Relay extension enabled.
- Dynamics requires that the user registering the plugin must be a deployment administrator, not just a system administrator without inclusion in the Deployment Administrators group of Deployment Manager. If the registering user lacks the proper permissions, Dynamics will return an error stating “**Assembly must be registered in isolation.**”