DYNAMICS 365 BUSINESS PROCESS VISUALIZATION USING VISIO

A Solution to create a Microsoft VISIO template by consuming the configured entity values from the CRM entity record.

Contents

Overview

The DYNAMICS 365 BUSINESS PROCESS VISUALIZATION USING VISIO Solution is an add-on feature to Dynamics 365 CRM to create a Microsoft VISIO template taking the values from the CRM entity record.

DYNAMICS 365 BUSINESS PROCESS VISUALIZATION USING VISIO benefits:

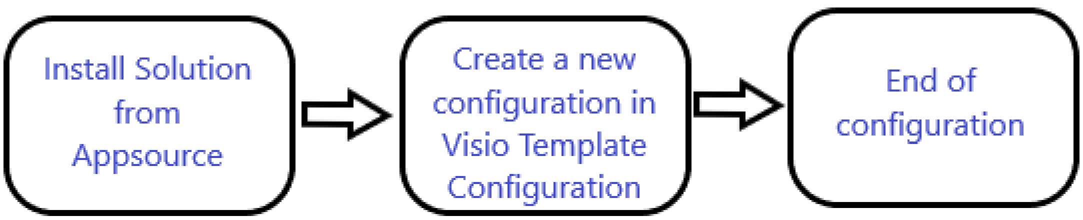
- DYNAMICS 365 BUSINESS PROCESS VISUALIZATION USING VISIO enables you to visualize the Opportunity Status (based on the template configuration entity) in a simplified way by using Microsoft VISIO.

This solution seamlessly works with Dynamics CRM 2016 and later.

DYNAMICS 365 BUSINESS PROCESS VISUALIZATION USING VISIO Configuration

The DYNAMICS 365 BUSINESS PROCESS VISUALIZATION USING VISIO solution can be used for Dynamics 365 opportunity entity. This section outlines the steps to be performed by a System Administrator to make Solution available to the end users.

The below diagram summarizes the configuration and usage of DYNAMICS 365 BUSINESS PROCESS VISUALIZATION USING VISIO solution, and the processes that runs in the backend.



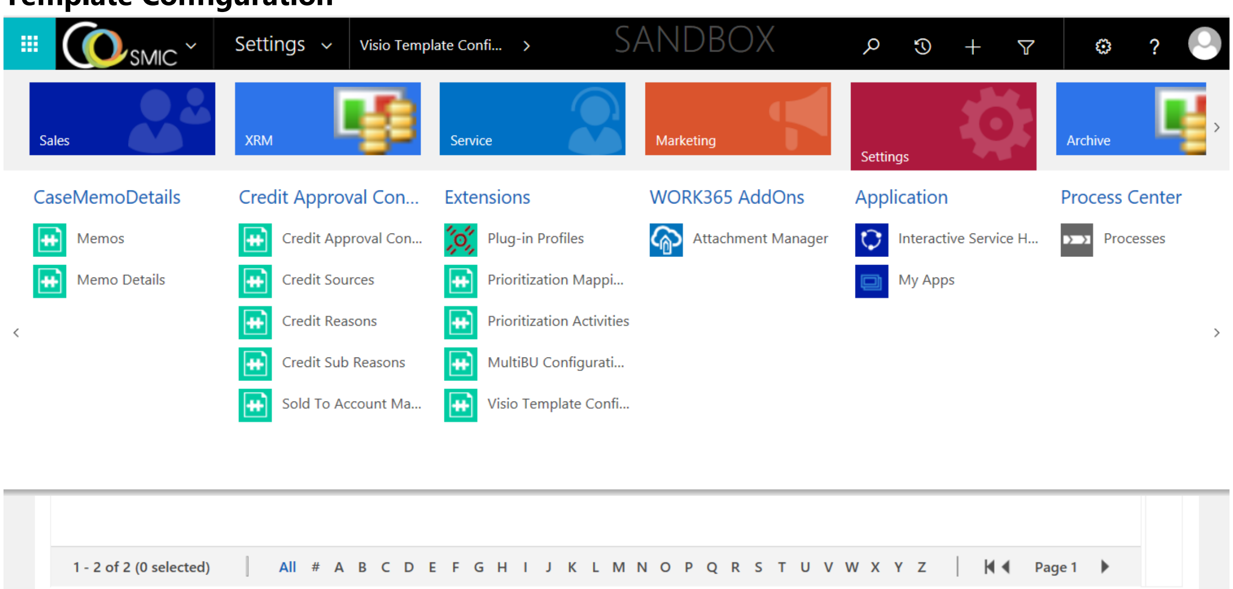
Solution Configuration Steps

Pre-requisites:

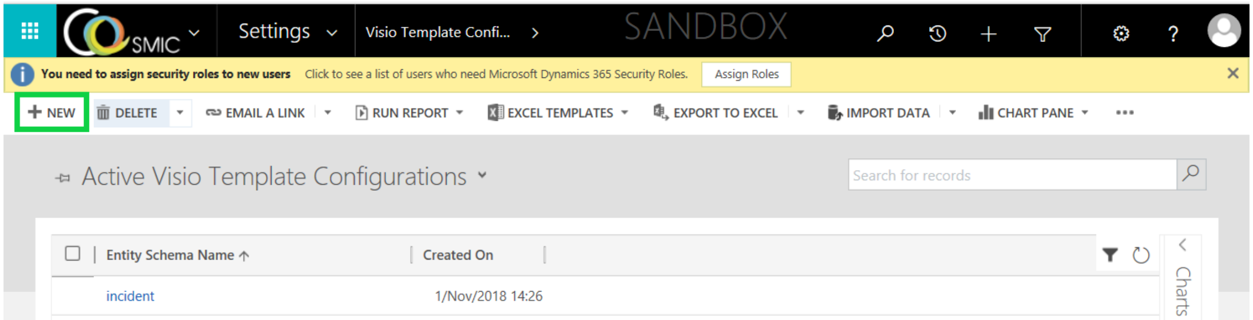
UI Configuration

1. Open Microsoft Dynamics 365

2. Go to **DYNAMICS 365 BUSINESS PROCESS VISUALIZATION USING VISIO -> VISIO Template Configuration**

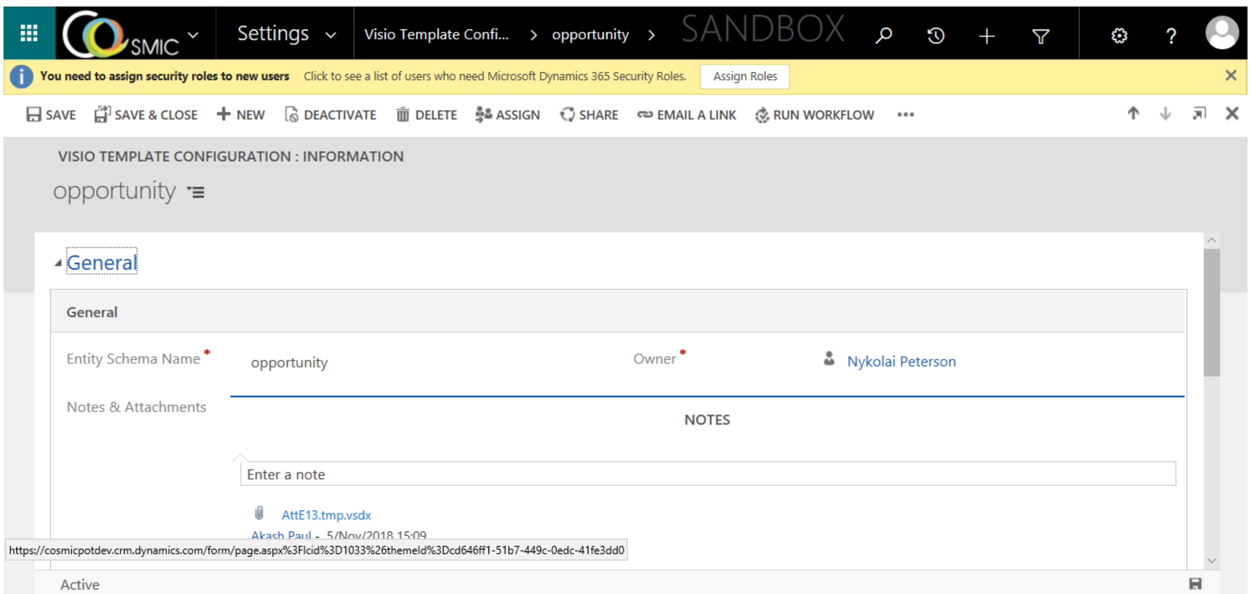


3. Click on **VISIO Template Configuration** and click *NEW* to create a new VISIO configuration.



Entity Schema Name: Mention the schema name of the entity whose records are to be exported to VISIO template. After mentioning, save the record to enable the Notes & Attachments section.

Note: The name of the Visio Template Configuration Entity should match with the entity schema name of the CRM org.

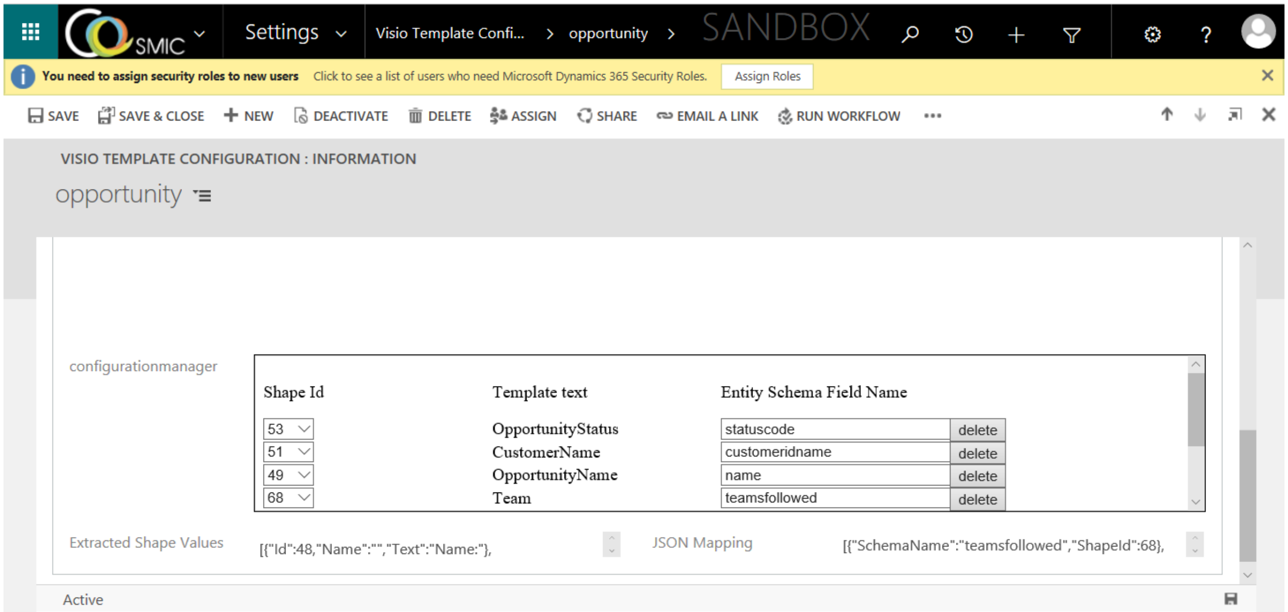


Notes & Attachments: Upload the blank VISIO template file in Notes & Attachments section. After that, refresh the page.

Extracted Shape Values: After refreshing, the VISIOTemplateReader plugin will read the VISIO template and assign a ID to each field along with the template text in the VISIO template.

VISIO Template Configuration Manager: Use this web-resource to map entity record attributes to the VISIO template fields.

- **Shape Id:** Represents the ID assigned to the field in the Extracted Shape Values.
- **Template Text** (Auto-populated)**:** Represents the field text present in the VISIO template.
- **Entity Schema Field Name:** Represents the schema name of the CRM entity attribute.

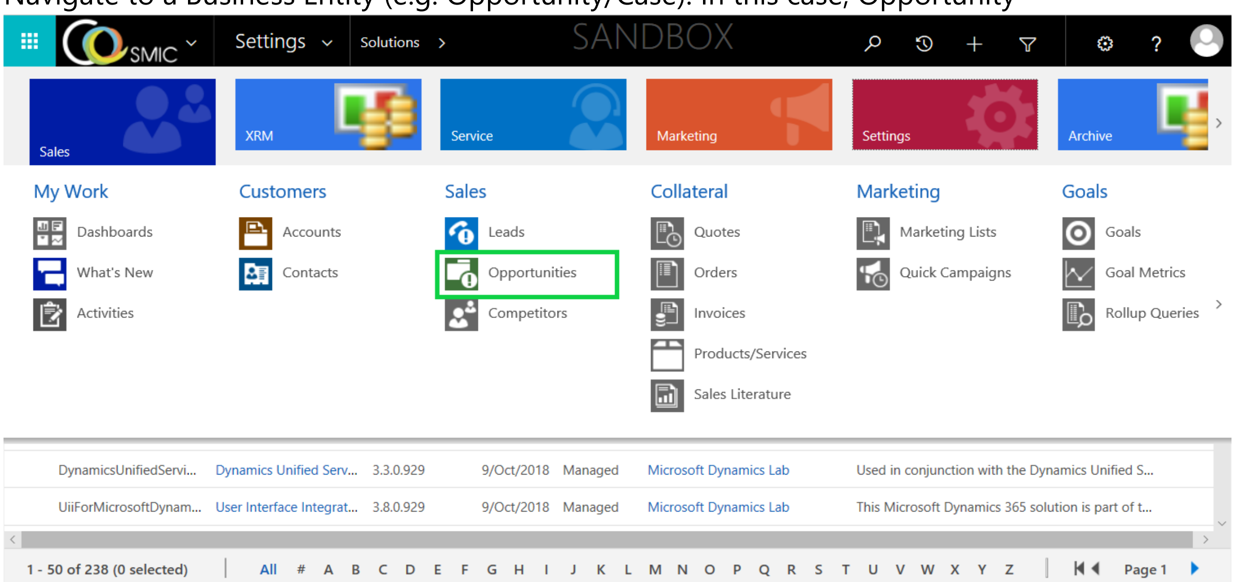


After mapping the values, click on SAVE to save the configuration.

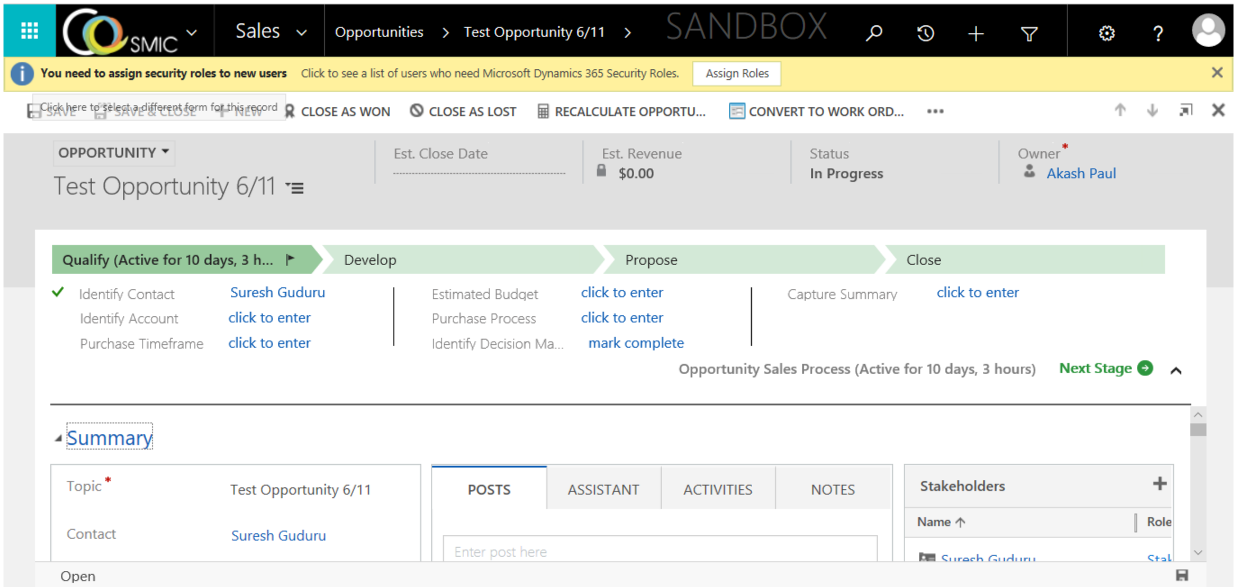
End User Experience

Once the solution is imported and configured in the Dynamics 365 organization, a user can create VISIO configurations for opportunity entity and export records to VISIO. The steps outlined below illustrate the process.

1. Navigate to a Business Entity (e.g. Opportunity/Case). In this case, Opportunity

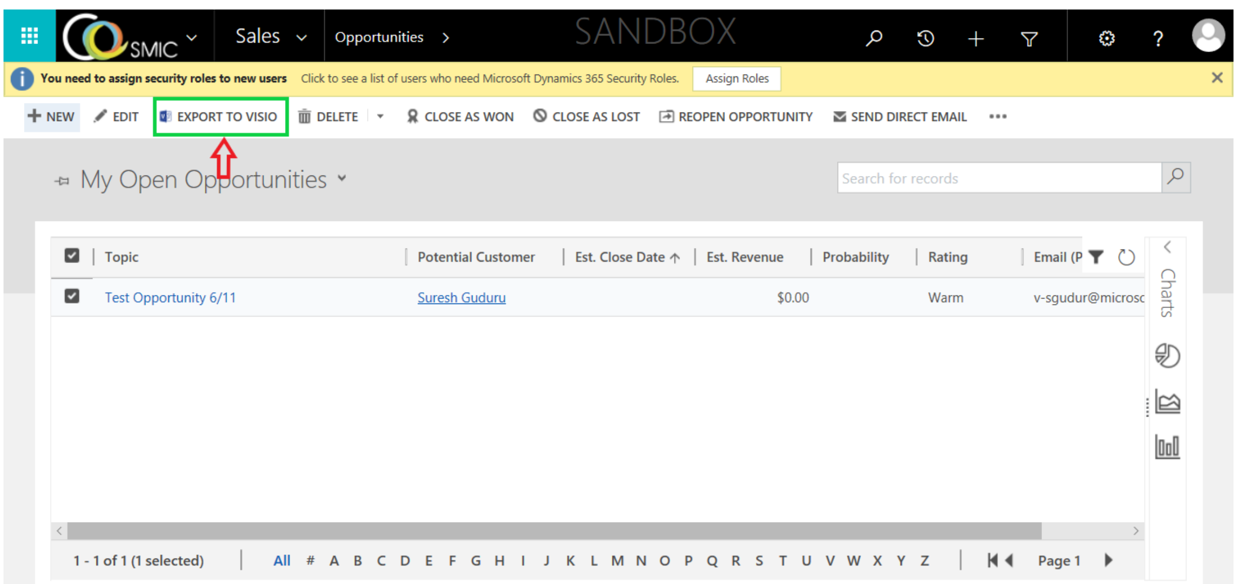


2. Create a new Opportunity.



3. Save the record and return to the Opportunity Lookup page.

4. Select the opportunity you want to export to VISIO and click on the *EXPORT TO VISIO* ribbon button.



On the click on of the *EXPORT TO VISIO* button, the ExportToVISIO plugin will trigger and fill the VISIO template fields with values from the CRM entity according to the mapping done in the VISIO Template Configuration Manager web-resource. The VISIO template with the values, will be attached to the Notes & Attachments section of that entity record.

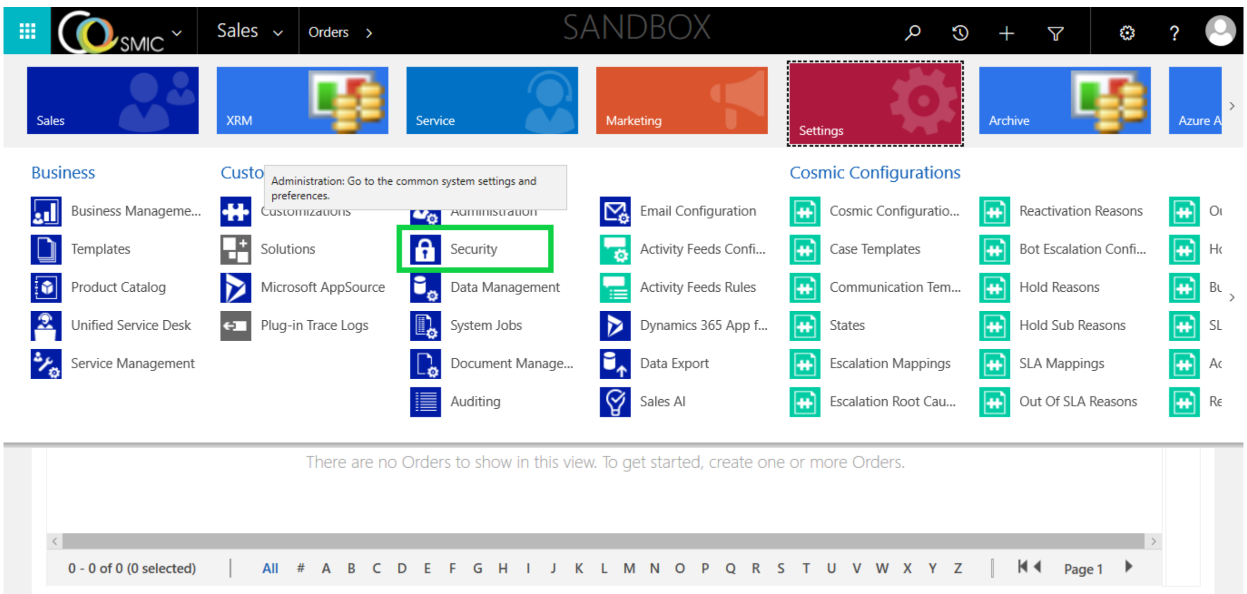
Confirmation of VISIO Template Export

- Open the entity record
- Go to the Notes & Attachment section
- Look for the VISIO template, download the attachment and check whether the field values match with the latest field values in the entity form.

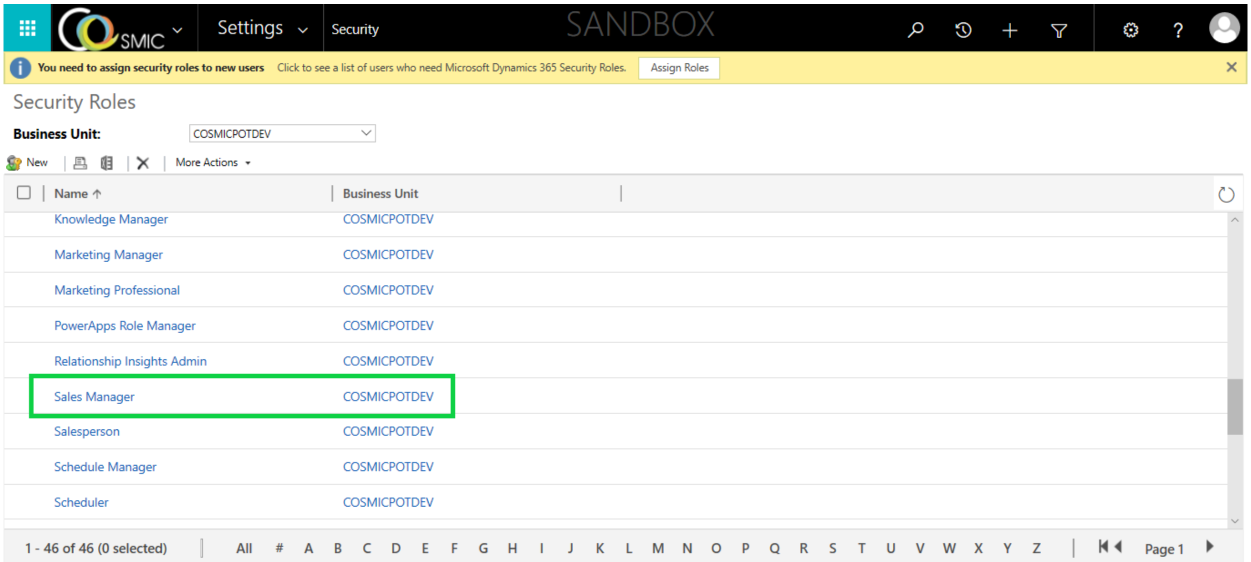
Access to the Custom Entities for other Roles

This section describes how to provide custom entity access to all roles except System Admin.
Scenario: System Admin wants to provide entity privileges to Sales Manager role.

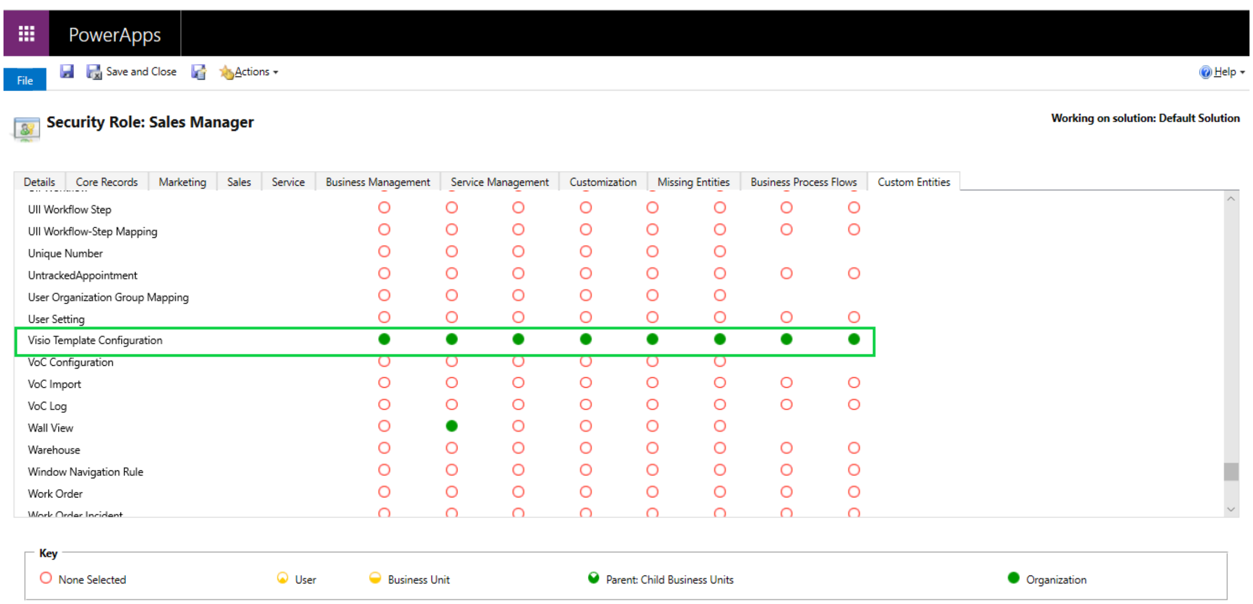
1. Login to the CRM and go to **Settings|Security**.



2. Click **Security Roles|Sales Manager** role as shown in the below screenshot.



3. Go to **Custom Entities** tab and set **read/write/update/assign/assigned** permissions for Sales Manager



Troubleshooting Steps

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