



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.

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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:

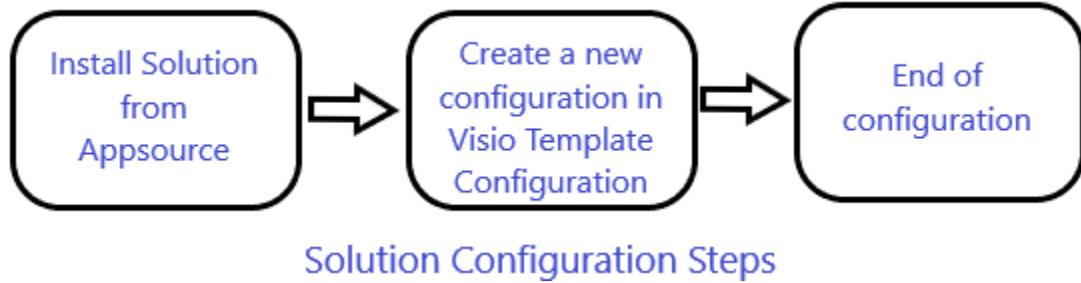
- DYNAMICS 365 BUSINESS PROCESS VISUALIZATION USING VISIO enables you to visualize the Opportunity Status (based on the template configuration entity) in a simplified way by using Microsoft VISIO.

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.

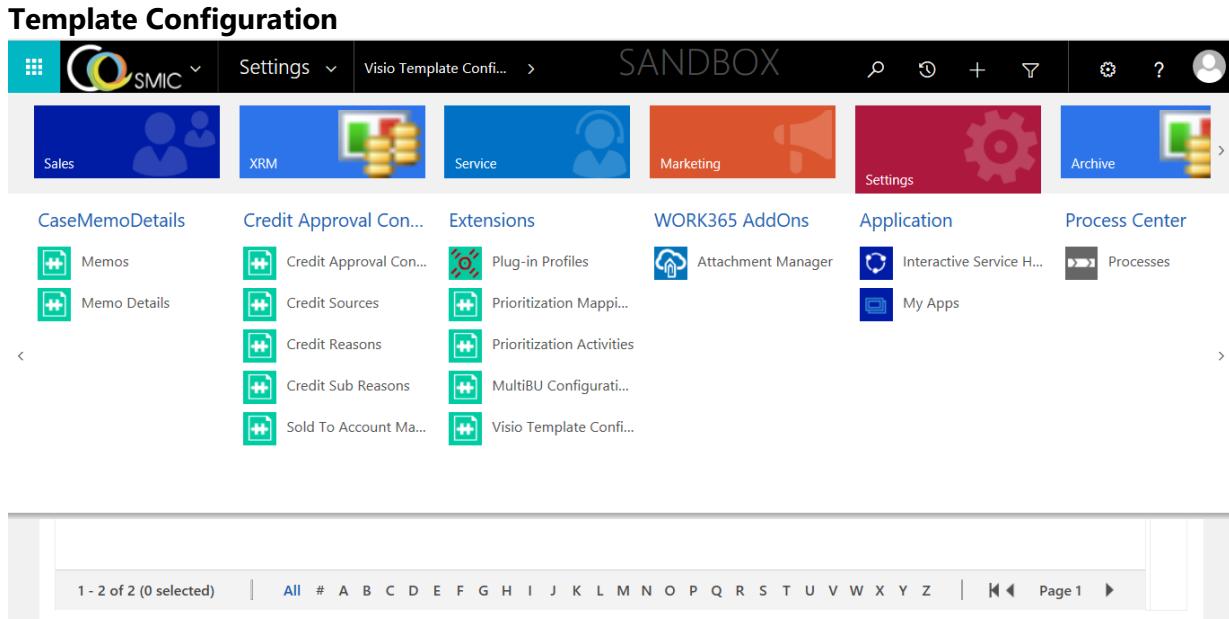
The below diagram summarizes the configuration and usage of DYNAMICS 365 BUSINESS PROCESS VISUALIZATION USING VISIO solution, and the processes that runs in the backend.



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.

The screenshot shows the Microsoft Dynamics 365 interface with the 'Sandbox' environment selected. The top navigation bar includes 'Settings', 'Visio Template Config...', 'Sandbox', and various search and filter icons. A yellow banner at the top right says 'You need to assign security roles to new users'. The main area displays a list of 'Active Visio Template Configurations' with one record shown: 'incident' created on '1/Nov/2018 14:26'.

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.

The screenshot shows the Microsoft Dynamics 365 interface with the 'Sandbox' environment selected. The top navigation bar includes 'Settings', 'Visio Template Config...', 'opportunity', 'Sandbox', and various search and filter icons. A yellow banner at the top right says 'You need to assign security roles to new users'. The main area displays the 'VISIO TEMPLATE CONFIGURATION : INFORMATION' for the 'opportunity' record. The 'General' tab is selected, showing the 'Entity Schema Name' as 'opportunity' and the 'Owner' as 'Nykolai Peterson'. The 'Notes & Attachments' section contains a note input field and an attachment named 'AttE13.tmp.vsdx' uploaded by 'Akash Paul' on '5/Nov/2018 15:09'.

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.

The screenshot shows the 'Visio Template Configuration : INFORMATION' page for the 'opportunity' entity. It displays a table mapping shape IDs to template text and entity schema field names. The table includes columns for Shape Id, Template text, and Entity Schema Field Name.

Shape Id	Template text	Entity Schema Field Name
53	OpportunityStatus	statuscode
51	CustomerName	customeridname
49	OpportunityName	name
68	Team	teamsfollowed

Extracted Shape Values: [{"Id":48,"Name":"","Text":"Name:"}, {"Id":68,"Name":"","Text":"Team"}]

JSON Mapping: [{"SchemaName": "teamsfollowed", "ShapeId": 68}, {"SchemaName": "customeridname", "ShapeId": 51}, {"SchemaName": "name", "ShapeId": 49}, {"SchemaName": "statuscode", "ShapeId": 53}].

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

End User Experience

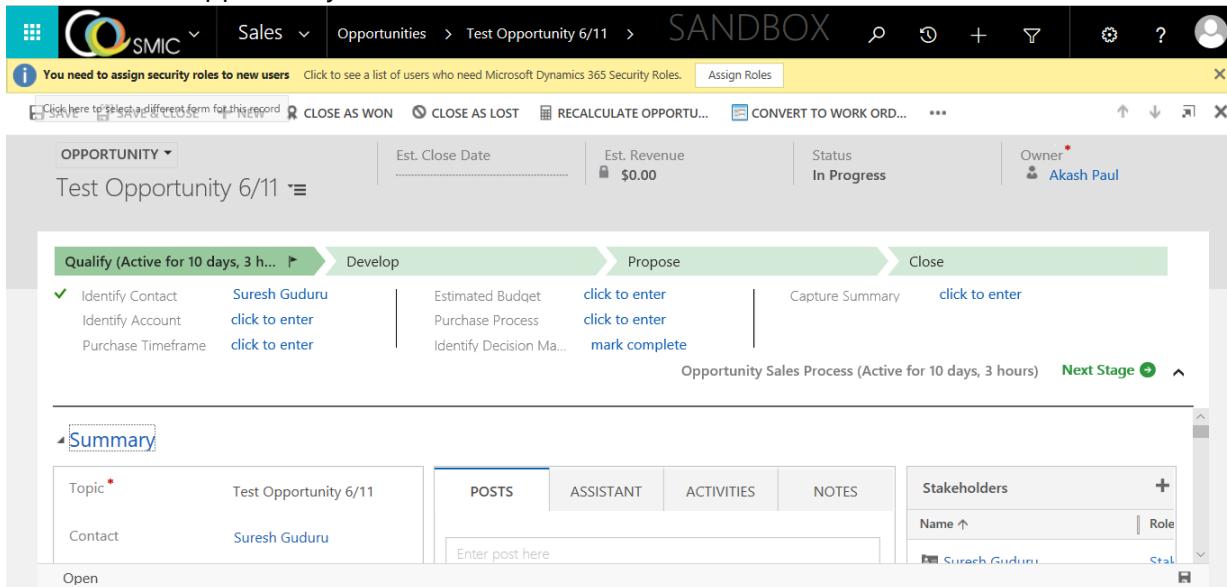
Once the solution is imported and configured in the Dynamics 365 organization, a user can create VISIO configurations for opportunity entity and export records to VISIO. The steps outlined below illustrate the process.

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

The screenshot shows the Microsoft Dynamics 365 home page. The top navigation bar includes links for Sales, XRM, Service, Marketing, Settings, and Archive. Below the navigation bar, there is a grid of business entities: My Work, Customers, Sales, Collateral, Marketing, and Goals. The 'Opportunities' icon in the Sales section is highlighted with a green box. At the bottom, a table lists installed solutions, and a navigation bar at the bottom shows page 1 of 238.

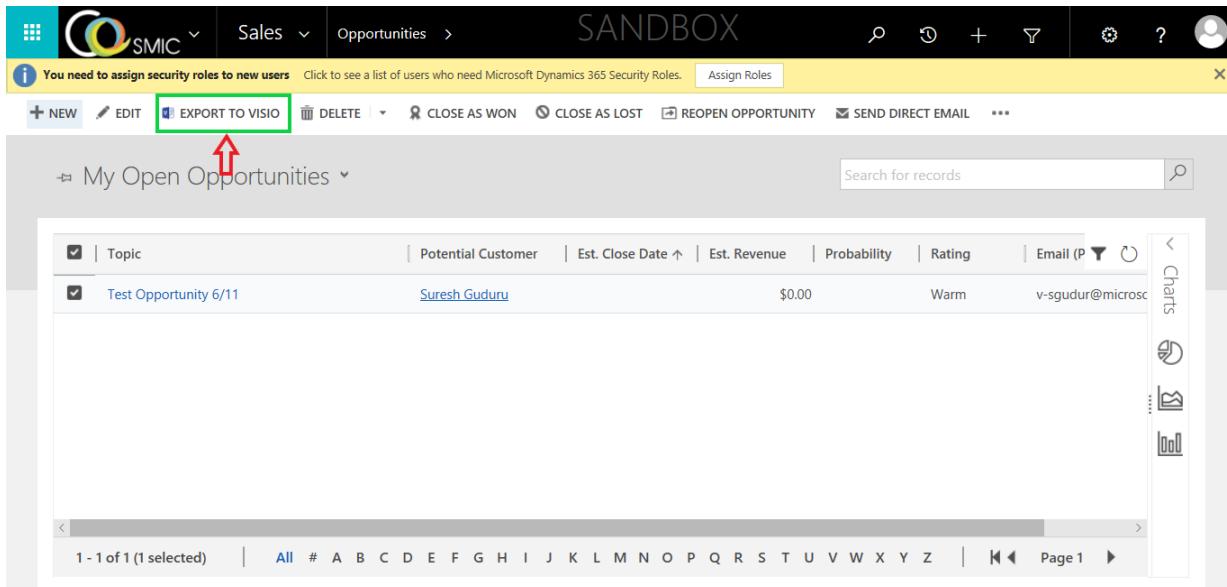
DynamicsUnifiedServ...	Dynamics Unified Serv...	3.3.0.929	9/Oct/2018	Managed	Microsoft Dynamics Lab	Used in conjunction with the Dynamics Unified S...
UiiforMicrosoftDynam...	User Interface Integrat...	3.8.0.929	9/Oct/2018	Managed	Microsoft Dynamics Lab	This Microsoft Dynamics 365 solution is part of t...

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

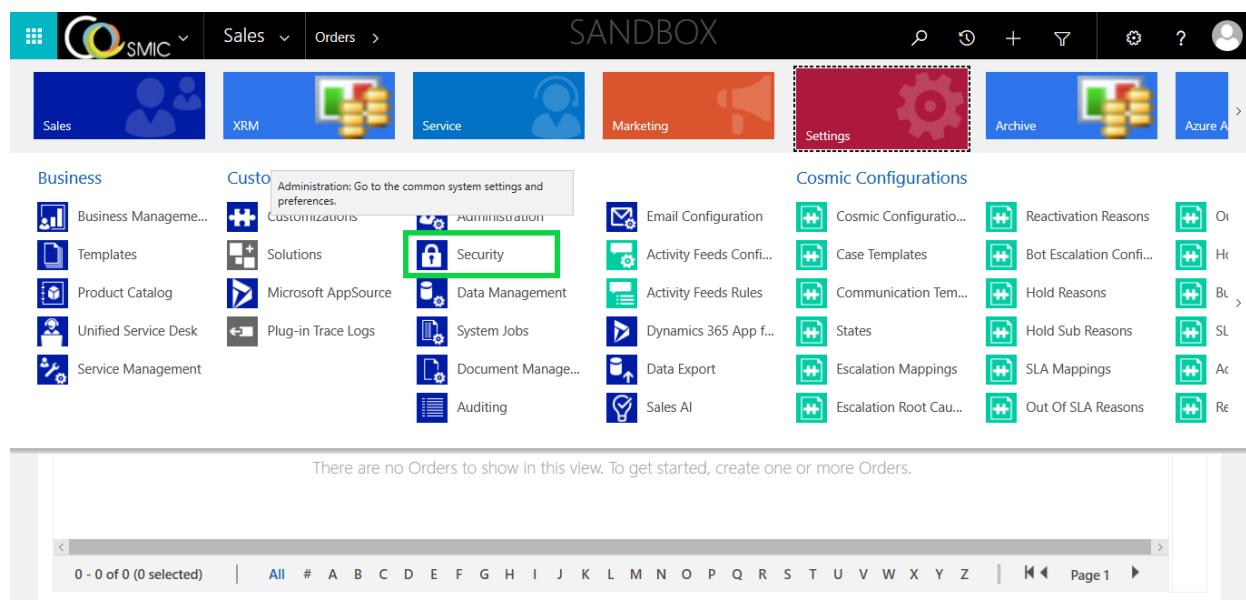
- Open the entity record
- Go to the Notes & Attachment section
- Look for the VISIO template, download the attachment and check whether the field values match with the latest field values in the entity form.

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.

The screenshot shows the Microsoft Dynamics 365 Security Roles page. At the top, there's a banner with the text "You need to assign security roles to new users" and a "Assign Roles" button. Below the banner, the title "Sandbox" is displayed. The main area is titled "Security Roles" and has a "Business Unit" dropdown set to "COSMICPOTDEV". A table lists various roles, each with a checkbox and a "Name" column. The "Sales Manager" row is highlighted with a green border. The "Business Unit" for all listed roles is "COSMICPOTDEV". The bottom of the screen shows navigation buttons for pages 1-46 and letters A-Z.

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

The screenshot shows the PowerApps Security Role: Sales Manager page. The top navigation bar includes "File", "Save and Close", "Actions", and "Help". The main content area is titled "Security Role: Sales Manager" and shows a grid of custom entities. The columns represent permissions: Details, Core Records, Marketing, Sales, Service, Business Management, Service Management, Customization, Missing Entries, Business Process Flows, and Custom Entities. The "Custom Entities" column is highlighted with a green border. The "Visio Template Configuration" entity has all permission icons filled with black. A legend at the bottom, titled "Key", defines the icons: a red circle for "None Selected", a yellow circle with a user icon for "User", a yellow circle with a business unit icon for "Business Unit", a green circle with a parent/child icon for "Parent: Child Business Units", and a green circle for "Organization".

Troubleshooting Steps

End of Document

