

CARESOFT TASK SCHEDULER

HELP GUIDE



//CareSoft uk

Version 1.2

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2. INTRODUCTION

Welcome to the CareSoft Task Scheduler for Dynamics 365. This document will guide you through the process of installing and configuring the Task Scheduler for your instance of Dynamics 365.

Before you begin, this guide assumes you have System Administrator experience of Dynamics 365 and an understanding of the process around publishing customizations. If these concepts are new to you we recommend you familiarize yourself with these concepts first before installing the task scheduler.

Alternatively, you can purchase a Premium Support Package from CareSoft UK Ltd and one of our support team will guide you through the process.

3. INSTALLATION

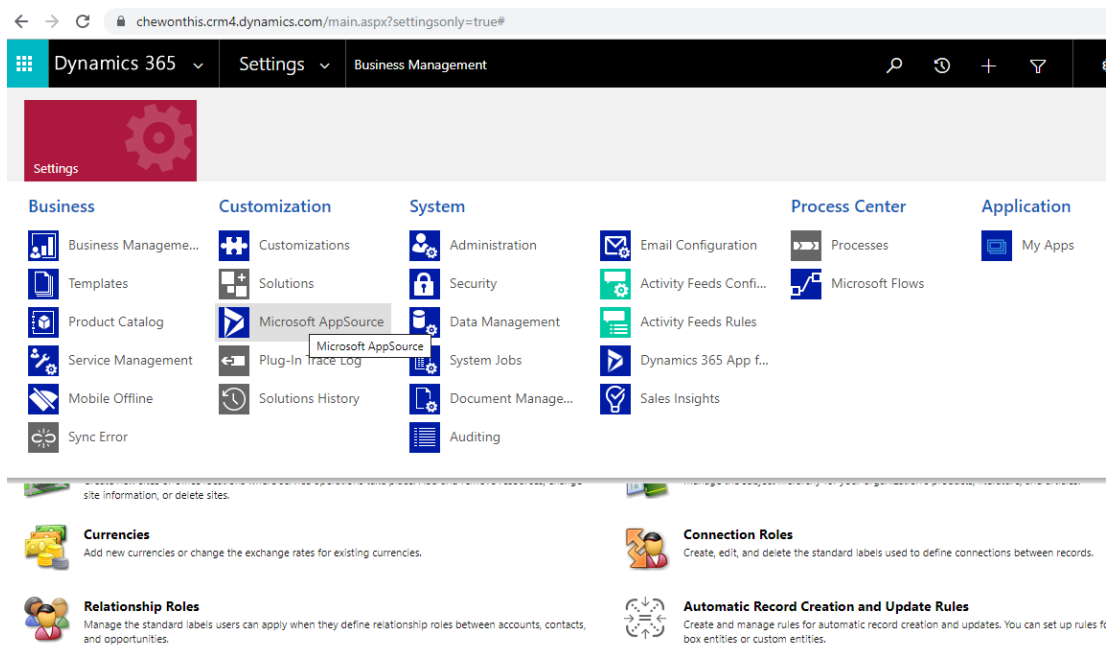
3.1 PRE-REQUISITES

Before beginning the installation process, ensure you have the following:

- An instance of Dynamics 365 CE and a user account with System Administrator permissions
- A user account with permissions to register an application within Azure Active Directory. EG. A tenant administrator

3.2 INSTALLATION PROCESS

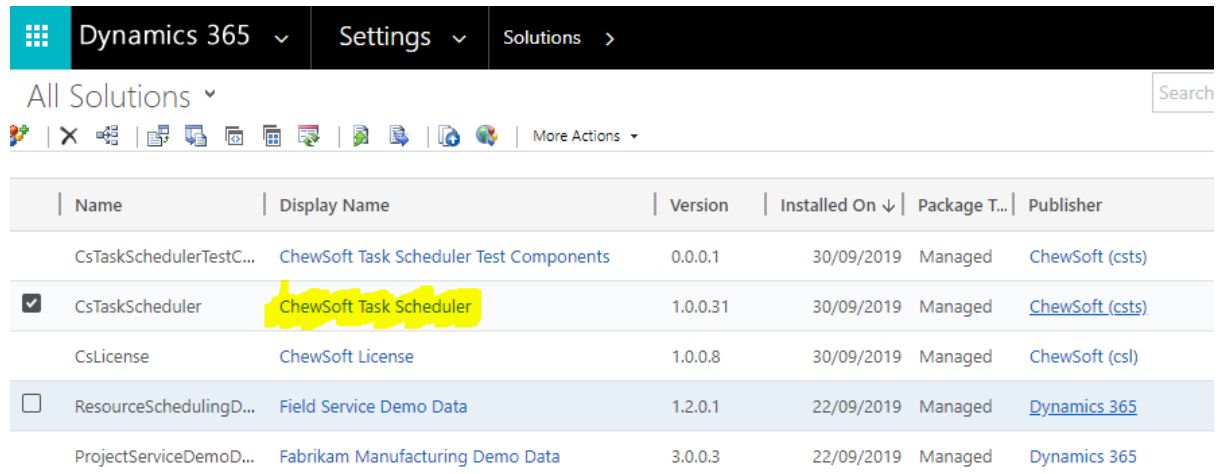
1. Open Dynamics 365 and navigate to Advanced Settings
2. From the menu, select Microsoft AppSource
3. In the App Source window that opens, search for Task Scheduler.
4. On the CareSoft Task Scheduler select "Free Trial" and follow the installation steps.



4. CONFIGURING THE TASK SCHEDULER

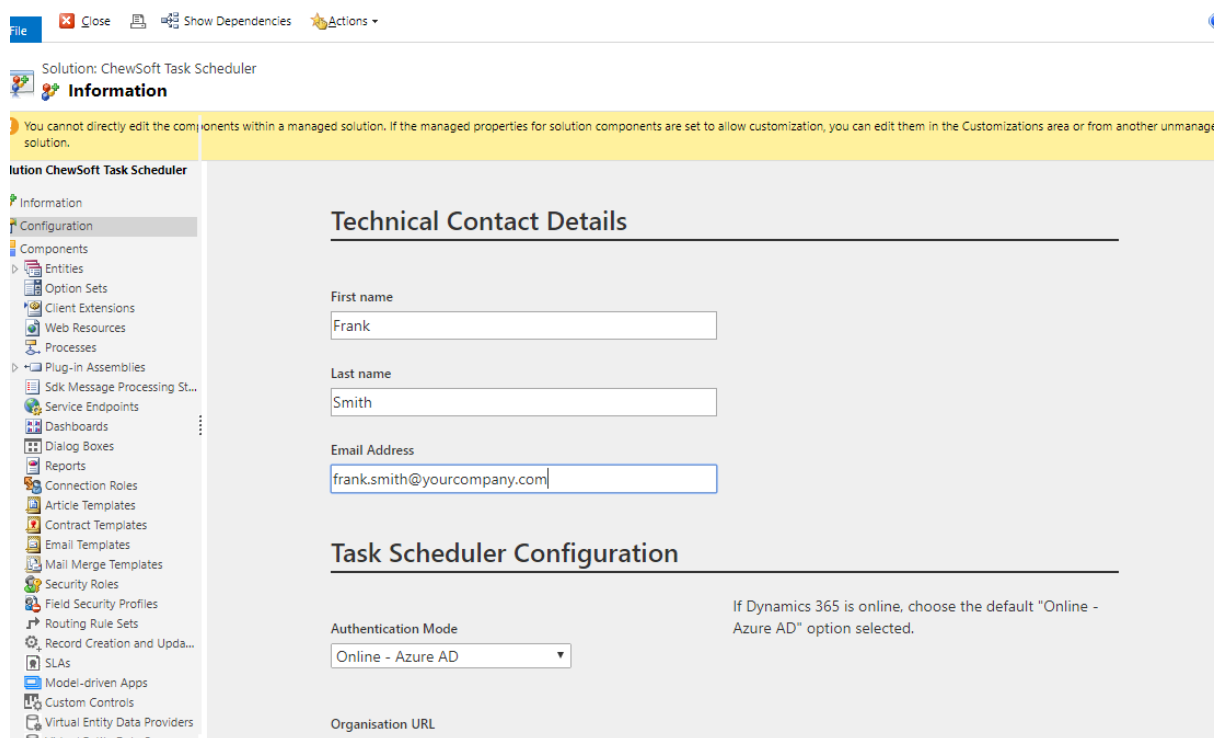
Once the installation process has completed, the task scheduler must be configured.

1. In Dynamics 365, Navigate to Advanced Settings
2. From the menu, select Solutions.
3. In the list of solutions, double click the entry for “CsTaskScheduler”



Dynamics 365						
Settings						
Solutions						
All Solutions						
Name	Display Name	Version	Installed On	Package T...	Publisher	
CsTaskSchedulerTestC...	ChewSoft Task Scheduler Test Components	0.0.0.1	30/09/2019	Managed	ChewSoft (csts)	
☒	CsTaskScheduler	ChewSoft Task Scheduler	1.0.0.31	30/09/2019	Managed	ChewSoft (csts)
	CsLicense	ChewSoft License	1.0.0.8	30/09/2019	Managed	ChewSoft (csl)
☐	ResourceSchedulingD...	Field Service Demo Data	1.2.0.1	22/09/2019	Managed	Dynamics 365
	ProjectServiceDemoD...	Fabrikam Manufacturing Demo Data	3.0.0.3	22/09/2019	Managed	Dynamics 365

4. In the window that opens, enter your organisation’s technical contact details for the Task Scheduler.



File Close Show Dependencies Actions

Solution: ChewSoft Task Scheduler

Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution: ChewSoft Task Scheduler

Information

Configuration

Components

Entities

Option Sets

Client Extensions

Web Resources

Processes

Plug-in Assemblies

Sdk Message Processing St...

Service Endpoints

Dashboards

Dialog Boxes

Reports

Connection Roles

Article Templates

Contract Templates

Email Templates

Mail Merge Templates

Security Roles

Field Security Profiles

Routing Rule Sets

Record Creation and Upda...

SLAs

Model-driven Apps

Custom Controls

Virtual Entity Data Providers

Virtual Entity Data Sources

Technical Contact Details

First name
Frank

Last name
Smith

Email Address
frank.smith@yourcompany.com

Task Scheduler Configuration

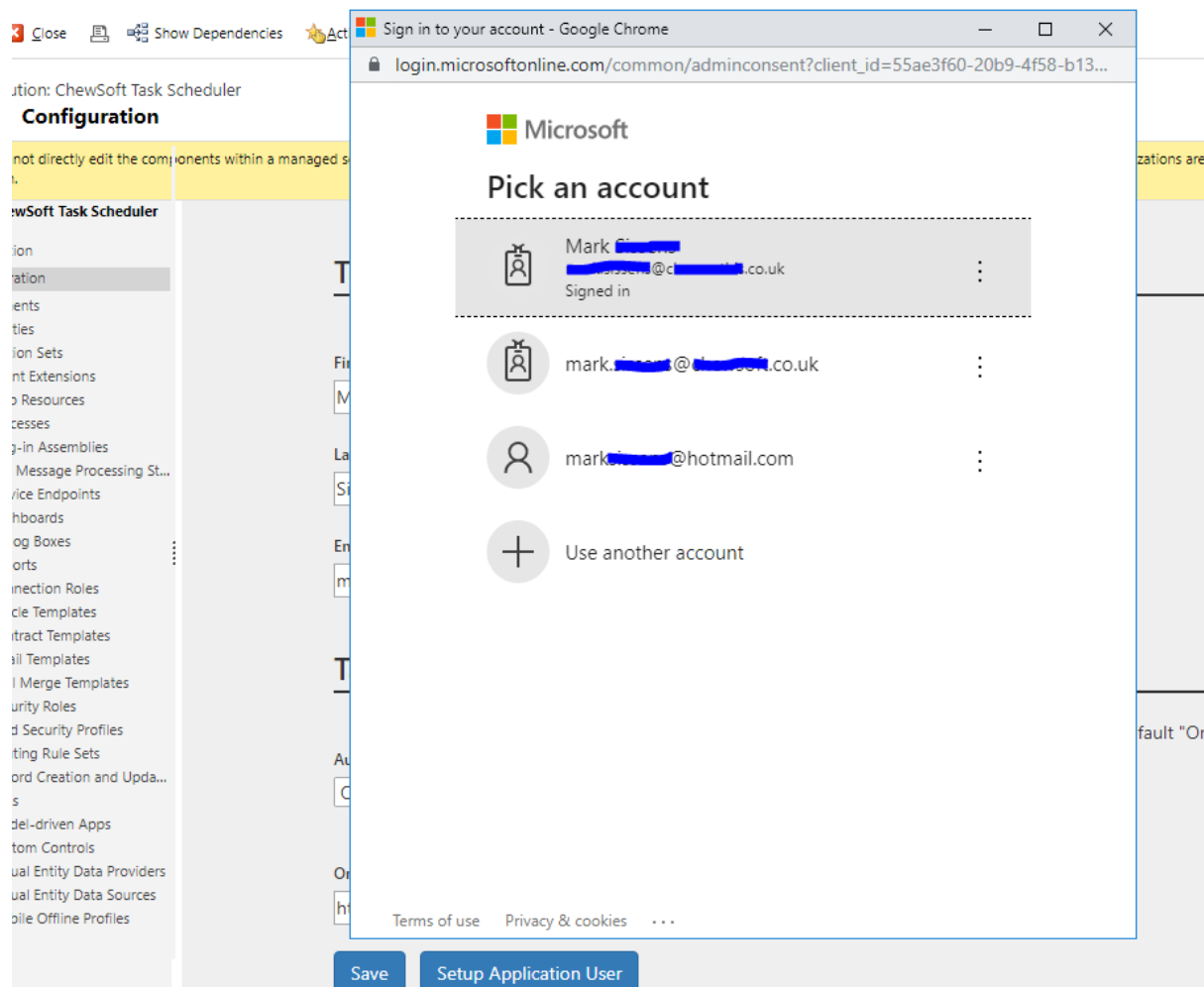
Authentication Mode
Online - Azure AD

Organisation URL

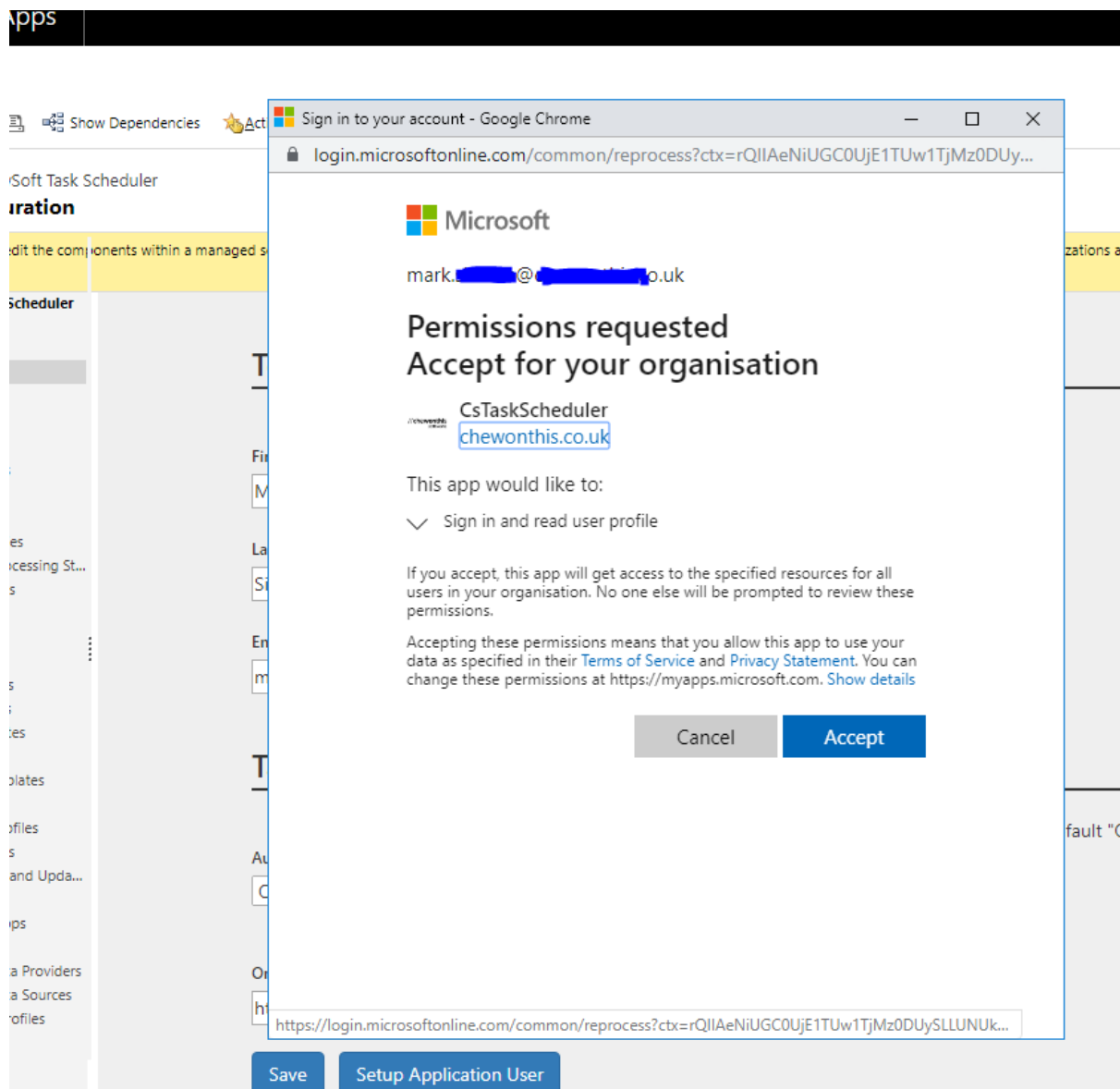
If Dynamics 365 is online, choose the default "Online - Azure AD" option selected.

5. Leave the Authentication Mode as “Online – Azure AD”
6. Check the Organisation URL is set correctly for the current instance of Dynamics 365.
7. Click Save.

8. A new window will open prompting you to login. Login with a user account that has administrator permissions on the Azure Active Directory Dynamics 365 is linked to.

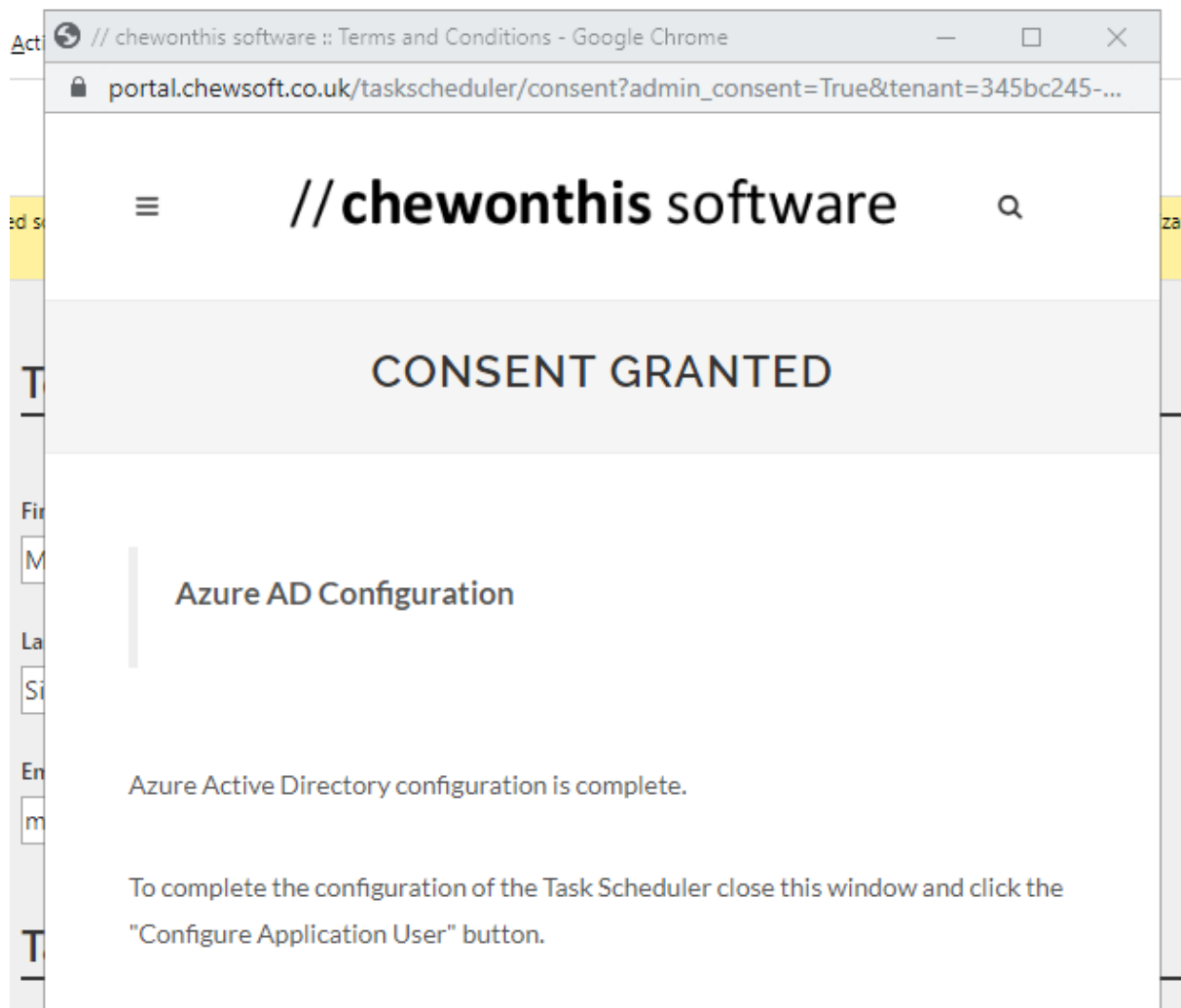


9. You will be prompted to Accept granting permission to the Task Scheduler Service to be registered within your Azure Active Directory. Click Accept.



NB. AT THIS POINT YOU ARE REGISTERING THE TASK SCHEDULER SERVICE ACCOUNT WITHIN YOUR AZURE ACTIVE DIRECTORY. HOWEVER, IT DOES NOT HAVE ANY PERMISSIONS WITHIN DYNAMICS 365 UNTIL YOU GRANT IT THE NECESSARY PERMISSIONS. THIS IS DONE IN THE FOLLOWING STEPS.

10. Once you have successfully granted permissions a "Consent Granted" message is displayed.



11. Close this window by clicking the x in the top right corner.

12. On the Task Scheduler configuration page, now click the "Setup Application User" button.

Task Scheduler Configuration

Authentication Mode

Online - Azure AD

Organisation URL

https://chewonthis.crm4.dynamics.com

Save

Setup Application User

Connectivity Test

If Dynamics 365 is online, choose selected.

CLICKING THIS BUTTON ASSIGNS THE TASK SCHEDULER SERVICE ACCOUNT PERMISSIONS TO EXECUTE SCHEDULED TASKS. HOWEVER, IT DOES NOT YET HAVE ACCESS TO ANY DATA WITHIN DYNAMICS 365 EXCEPT THE CUSTOM ENTITIES INCLUDED IN THE TASK SCHEDULER SOLUTION. IN ORDER TO ENABLE THE TASK SCHEDULER TO TRIGGER WORKFLOWS ON OTHER ENTITIES IN DYNAMICS 365 YOU MUST ASSIGN A SECURITY ROLE WITH THE PERMISSION TO DO THIS. THIS WILL BE COVERED IN A SUBSEQUENT STEP.

13. Next Click the “Connectivity Test” button. Check the test is successful. If the test is not successful, review the error message and then repeat the associated steps in this process related to the failure.

14. Configuration of the Scheduler is now complete. Close the Task Scheduler window.

4.2 HELP WITH INSTALLATION

If you are unable to successfully complete the installation process, please click the “Support Request” link to raise a ticket. One of our technical support team will contact you directly.

Contact Details

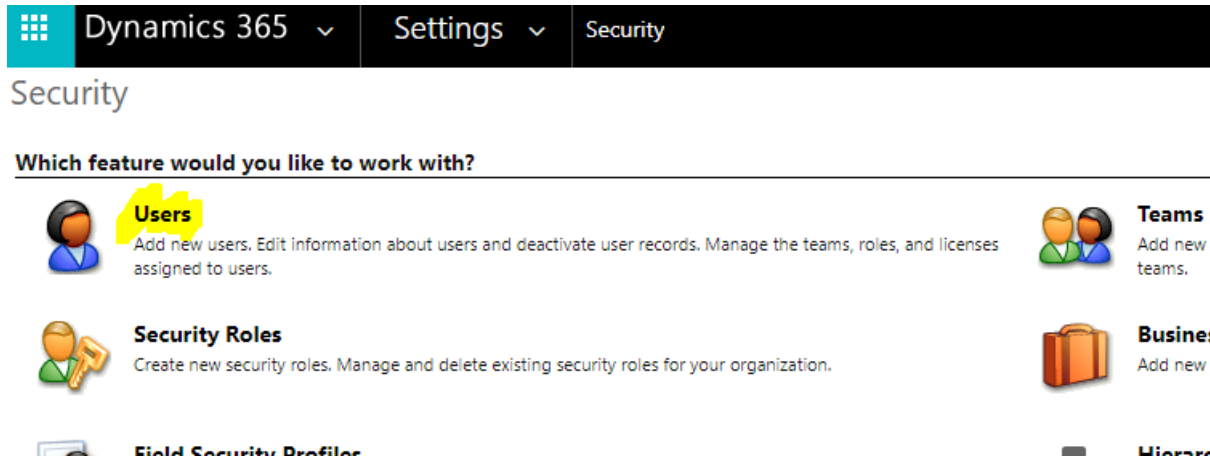
	Quick Links
	Help Guide
	Support Request
	Purchase License
	Upgrade Solution
ewonthis.co.uk	

5. ASSIGNING PERMISSIONS TO THE TASK SCHEDULER

Before you can create your first scheduled task, you must provide the Task Scheduler Service account the permissions it requires in Dynamics 365 to select the target records for the task and execute the target workflow.

This is done by applying a role with the necessary permissions to the service account:

1. In Advanced Settings, navigate to “Security” from the menu.
2. On the page that is displayed, click “Users”



3. Next, double click the “Task Scheduler” user account from the list of Enabled Users.

Enabled Users							Search for records
☐	Full Name ↑	Site	Business Unit	Title	Position	Main Phone	
	[REDACTED]		chewonthis	[REDACTED]		[REDACTED]	
	Microsoft Forms Pro		chewonthis				
	PowerApps Checker Application		chewonthis				
	Task Scheduler		chewonthis				

4. From the menu, click “Manage Roles”.

CONNECT | PROCESS | APPROVE EMAIL | REJECT EMAIL | REASSIGN RECORDS | **MANAGE ROLES** | JOIN TEAMS | CHANGE BUSINESS UN

USER Task Scheduler

The information provided in this form is viewable by the entire organization.

Summary

Account Information	
User Name *	CsTaskScheduler@che

User Information	
Full Name *	Task Scheduler
Title	

POSTS

Enter post here

POST

All posts | Auto posts | User posts

TEAMS	
Team Name ↑	
	chewonthis

- In the "Manage User Roles" window, select a Role with the permissions required to read and trigger on demand workflows for the types of record you wish to create scheduled tasks for.

Manage User Roles

What roles would you like to apply to the 1 User you have selected?

Role Name	Business Unit
☐ Relationship Insights Admin	chewonthis
☐ Resource Manager	chewonthis
☒ Sales Manager	chewonthis
☐ Sales, Enterprise app access	chewonthis
☐ Salesperson	chewonthis
☐ Schedule Manager	chewonthis
☐ Scheduled Task Administrator	chewonthis

OK Cancel

NB. DO NOT APPLY THE SYSTEM ADMINISTRATOR OR SYSTEM CUSTOMIZER ROLE TO THE SERVICE ACCOUNT.

- Click OK.

6. CREATING A SCHEDULED TASK

As a System Administrator or a Scheduled Task Administrator:

1. Navigate to Advanced Settings and click “Scheduled Tasks” from the menu
2. Click “New” to create a new scheduled task.
3. Enter the name of the task. EG. Calculate Monthly Invoice
4. Select a Workflow to execute.
5. Click Save

The screenshot shows the Dynamics 365 interface for configuring a scheduled task named "Calculate Monthly Invoice". The top navigation bar includes "Dynamics 365", "Settings", and "Scheduled Tasks". The task is currently "Enabled" and its "Next Execution" is scheduled for "21/10/2019 06:30".

General

Task Details

Name *	Calculate Monthly Invoice
Workflow *	Append Date to Account Website (CsTaskScheduler Test)
Status Reason	Enabled
Owner *	Mark Sissens

Task Summary

Next Execution	21/10/2019 06:30
Last Execution	
Last Execution Status	

NOTES

Enter a note

Target Records

Target Fetch XML Query *

```
<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
  <entity name="account"> <attribute name="accountid" /> <order attribute="name"
    descending="false" /> </entity> </fetch>
```

Estimated Count: 7,500

Schedule

Name ↑	Frequency	Next Execution
Week Day Schedule	Weekly	21/10/2019 06:30

Execution History

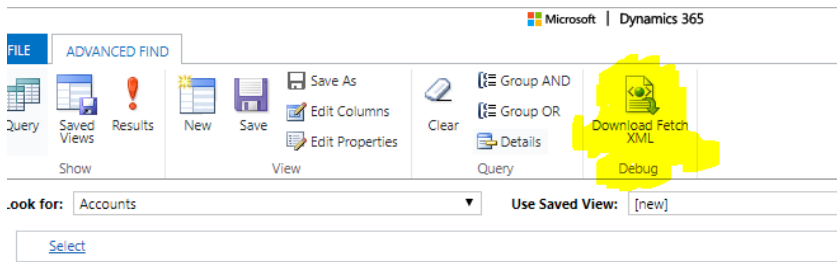
Created On ↓	Execution Status	Execution Count	Error Message
--------------	------------------	-----------------	---------------

6.2 SELECTING TARGET RECORDS

In order to identify the target records for your scheduled task, you will be prompted to enter a Fetch XML Query.

The simplest way of creating a Fetch XML Query is to:

1. Open Advanced Find in Dynamics 365 and create the query you require.
2. Click the “Download Fetch XML” button from the menu.



3. Open the downloaded file in notepad and copy the text.
4. Paste the text into “Target Fetch XML Query” field.
5. Click Save

NB. The Task Scheduler will update the Fetch XML statement to remove any data fields it does not require. This helps protect your data and enhances the performance of the scheduler.

6.3 CREATE A SCHEDULING PATTERN

A single task can be executed on any combination of schedules required. For example, you may choose to execute your task on every Wednesday at 11am and also the last Sunday of the month at 2pm. The Task Scheduler allows you to create as many scheduling patterns as you require and to apply these in combination.

To create a new scheduling pattern for your task:

1. Click the + button on the “Schedule” section of the form.
2. Enter the name of the scheduling pattern EG. Working Day schedule
3. In the Frequency drop down, select the frequency with which you would like to trigger this task. EG. Weekly.
4. Change the status reason to “Enabled”
5. Select the start time for the first time this pattern should fire.
6. Click the Weekly tab to enter the weekly specific recurrence values. For example, select the days of the week this schedule should be triggered on. For example, for week days select Monday, Tuesday, Wednesday, Thursday, Friday.
7. Click Save

6.4 REVIEW SCHEDULED TASK

Open the scheduled task and confirm the task is Enabled and has a “Next Execution” date time specified.

EW
DEACTIVATE
DELETE
ASSIGN
SHARE
EMAIL A LINK
RUN WORKFLOW
START DIALOG
FLOW
...

SCHEDULED TASK : INFORMATION
Calculate Monthly Invoice

Status Reason
Enabled

Next Execution
21/10/2019 06:30

General

Task Details

Name *

Calculate Monthly Invoice

Workflow *

Append Date to Account Website (CsTaskScheduler Test)

Status Reason

Enabled

Owner *

Mark Sissens

Target Records

Target Type

Fetch XML Query

Estimated Count

7,500

Target Fetch XML Query *

<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
<entity name="account"> <attribute name="accountid" /> <order attribute="name" descending="false" /> </entity> </fetch>

6.5 REVIEW TASK EXECUTION HISTORY

Each time your scheduled task is executed, an Execution History record is created to track the status of the scheduled task. You can find these records in the Execution History section of the Scheduled Task form.

2 PM Every Working Day	Daily	17/10/2019 14:00	
Overnight Schedule	Daily	17/10/2019 00:45	
Execution History			
Created On ↓	Execution Status	Execution Count	Error Message
17/10/2019 00:45	Succeeded	8,500	
16/10/2019 14:00	Succeeded	9,999	
16/10/2019 00:45	Succeeded	9,999	
15/10/2019 14:00	Succeeded	9,999	

7. REQUESTING HELP

The CareSoft Support team are available to support you should you encounter difficulties with the Task Scheduler.

You can contact us in the following ways:

7.1 RAISE A SUPPORT REQUEST

Please click the “Support Request” link to raise a ticket on the configuration page of the Task Scheduler. One of our technical support team will contact you directly.

Contact Details

	<u>Quick Links</u>
	<u>Help Guide</u>
	<u>Support Request</u>
	<u>Purchase License</u>
	<u>Upgrade Solution</u>
ewonthis.co.uk	

7.2 CONTACT THE TEAM

You can contact our support team directly via email: support@caresoftuk.com