Product Description
d.velop connect for Dynamics 365 CE

1 Summary

Below is a description of the functions and services of d.velop connect for Dynamics 365 CE. The information in the "Product Description d.velop cloud platform" also applies to d.velop cloud customers. MS Dynamics 365 Customer Engagement is a customer relationship management (CRM) system.

Services relating to support, availability, and updates for d.velop connect for Dynamics 365 are described in the "Service Level Agreemen".

d.velop connect for Dynamics 365 CE is an interface that customers can use to connect their Microsoft Dynamics 365 Customer Engagement (CE) with their d.velop document management system (DMS), regardless of whether they use d.velop documents, d.velop documents (on premises) operated as a hybrid solution, or d.velop documents for Microsoft 365. Doing so allows customers to store documents from their CRM software in their DMS, the company-wide information center.

2 Definitions

2.1 Application Programming Interfaces (hereinafter referred to as "API")

The API is provided by systems with certain functions to allow other programs to connect with the respective system and to use given functions.

2.2 Representational State Transfer (hereinafter referred to as "REST")

REST is a software architectural mode for provisioning standards among various computer systems in order to enable communication among the systems.

2.3 Microsoft Dynamics 365 CE

Microsoft Dynamics CRM has changed names many times, most recently to Microsoft Dynamics 365 Customer Engagement; in this document, it is usually referred to as CE or the CRM system. A CRM system is an application for managing customer relationships.

2.4 d.velop connect for Dynamics 365

The connector for connecting the customer's Dynamics 365 CE system to the d.velop platform, which is also referred to as the adapter in the following.

3 Architecture

There are two components that communicate with each other via web services and have the following tasks:

- d.velop connect for Dynamics 365 CE
    - This engine (managed solution) within the CRM system provisions the required functions and APIs for operation within the CRM system.
- d.velop connect for Dynamics 365
    - This middleware is operated within the d.velop platform and is located outside of the CRM system.

d.velop connect for Dynamics 365 CE is operated exclusively as SaaS (software as a solution). On-premises installation of Microsoft Dynamics 365 CE is not supported. If the customer runs downstream specialized applications (such as d.velop documents, d.velop connect for Microsoft SharePoint, smart invoice) using a different operating form, these specialized applications can be connected via d.velop platform connect using a hybrid

configuration. The adapter provides configuration and business objects to the entire platform and can be consumed bidirectionally through additional apps. That is possible using the connector d.velop connect for Microsoft SharePoint, which also enables seamless collaboration with d.velop documents for M365 (SharePoint online).

The following chapters describe the exact scope of functions. The adapter contains a managed solution, which is a package that must be installed in CE. It contains a workspace and underlying functions that make it possible to create a connection from CE to the d.velop-side adapter.

4 Scope of functions

This section explains the scope of functions mentioned earlier in greater detail.

4.1 Deliverables

d.velop connect for Dynamics 365 CE contains the following deliverables: an adapter (which is provisioned in the d.velop platform and acts as an endpoint and application within the platform) and a managed solution (which must be installed in CE). The managed solution creates a configuration area with the CE look and feel and provides configuration items and underlying functions that are described in greater detail in the following.

4.2 Connectivity

The deliverables mentioned in chapter 4.1 are standardized and, as specified by the Microsoft Azure security architecture, connected with each other using an Azure AD application in order to enable bidirectional communication between the CE system and the d.velop platform. On the CE system side, an application user (including a defined security role) is connected with the Azure application and thus safeguards all access to the system.

4.3 Mode of operation

The adapter can be provisioned both in the cloud and on premises, which makes the cloud and hybrid operating states possible. If an on-premises d.velop DMS is used, the hybrid configuration is a good solution. Only cloud operation is supported for MS Dynamics 365 CE.

4.4 Reporting and analysis options

The adapter has a monitoring function that tracks every document to be exported as a job in its life cycle, from creation to successful processing. If an error occurs, there is a detail level containing additional information about the error so users can understand and fix it. The job can then be executed again. This function is a transactional mechanism.

4.5 Managing user rights

An application user is expected on both sides for bidirectional communication between Dynamics 365 CE and the d.velop platform. On the CE side, permissions are granted in the Azure Application API and an application user is linked to the Azure application in CE itself. In addition, the CRM solution comes with security roles that need to be assigned to the application user. A service user with admin rights is expected on the d.velop platform side. On behalf of this user, configuration settings are automatically made, and documents, dossiers, and properties are created on the d.velop platform side.

4.6 Web front end

Users can operate all administrative and user interfaces using a current web browser (Chrome, Safari, Edge). The d.velop information management system is technically integrated as an iFrame. If you have decided in favor of an on-premises d.velop documents as your DMS, you will need a web-based client to enable the iFrame-based integration.

4.7 Authentication

The authentication options of the d.velop platform are available for authenticating the user. The authentication requirements are defined in the d.velop cloud platform service description. Authentication on the CE side takes place according to Microsoft's standards.

4.8 Import/Export

Customers have the option of exporting and importing the configurations created in CE. They can use this option during a transport from a test system to a productive system, for example. It contains the settings or report parameters and document reference view. Requirements regarding export and import options are specified in the product description of the d.velop platform and the selected DMS.

4.9 Standard use cases

This section describes the standard use cases.

4.9.1 Document storage

The customer can stipulate which reports generated in CE are exported to the d.velop platform in their configuration. They must stipulate which properties are exported with the report and which property constitutes the unique key so that this export takes place only once. The following functions can be mapped:

- Automated document storage when a document is stored in an entity's CE timeline
- Manual storage of freely configurable document types in a modal dialog
    - Automated read-out of properties from the triggering entity
- Automatic dossier creation in the d.velop DMS when a new entity is created in CE
    - Synchronization of dossier properties in d.velop DMS when properties are modified in CE
- Extension of properties available for an entity using FetchXML technology

The export takes place as an asynchronous transaction and is controlled by a periodically recurring batch job.

4.9.1.1 Support of output management systems

Output management systems are frequently used for document generation in order to create a better result in terms of corporate identity and design. The following output management systems are supported. Documents must be stored in the timeline for the storage mechanism to work.

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4.9.1.2 Integrating and displaying an electronic dossier

In their configuration, the customer can stipulate the form in which the d.velop web client is to be embedded. It is embedded on the basis of a URL that can be enhanced and adapted by a specific value from the selected entity using placeholders. In this manner, the desired dossiers or document view for the selected entity are called up. This process is driven by a search. The customer can decide whether they want the embedding to take place using an IFrame or a new browser tab.

5 Technical requirements

The customer undertakes to operate a software version of his Dynamics 365 systems, which is supported by Microsoft. The version of the d.velop integration in Microsoft Dynamics 365 is supported by d.velop for 12 months after its release. d.velop reserves the right to restrict functionalities after expiry of the aforementioned 12 months. d.velop does not guarantee compatibility with older software versions of MS Dynamics 365 that are no longer supported by Microsoft.

The system requirements described in the documentation that d.velop provides to the customer in the service portal apply.

6 Limits

The limits described in the documentation apply.