Incremental Group

Auto Summary Release Notes

Contents

Section 1 - Introduction

Thank you for downloading and installing the Auto Summary solution. This configuration document is for the Incremental Group Auto Summary solution v8.0.0.4 released on 12th August 2016. Version v8.0.0.4 marks the latest official Release-To-Web (RTW) for Auto Summary for Microsoft Dynamics CRM.

1.1   Known Issues

There are no known issues for this release.

1.2   Version Notes

Here is the current version and release history of Auto SLA Calculator;

1.2.1   CRM2016

» v8.0.0.4 - Fixed an issue with N:N summarisation.
» 8.0.0.2 - Fixed an issue whereby filter queries were not working correctly.
» 8.0.0.0 - RTW (7th January 2016).

1.2.2   CRM2015

» v7.0.0.4 - RTW (18th May 2015) implemented 'no lock' query expression to improve performance. Fixed issue with MIN/MAX on date fields whereby daylight saving time was not being considered in the result.
» v7.0.0.1 - RTW (26th March 2015) - Fixed an issue with MIN/MAX operators not working with manual triggers.
» 7.0.0.0 - RTW for CRM2015

1.2.3 CRM2013

» 6.0.1.11 - RTW (18th May 2015) Fixed issue with MIN/MAX on date fields whereby daylight saving time was not being considered in the result.

» 6.0.1.10 - RTW (26th March 2015) - Fixed an issue with MIN/MAX operators not working with manual triggers.

» 6.0.1.7 - RTW (13th January 2014) Fix: AutoSummary will not fire if the parent record is inactive.

» 6.0.1.6 – RTW (2nd January 2014) Enhancement: Ability to count many-to-many relationships except those linking Marketing Lists with Contact / Account / Lead). This will be provided in a future release.

» 6.0.1.5 – RTW (29th November 2013) Enhancement: Ability to Min/Max on child date fields. Ability to count many-to-many relationships (i.e. number of marketing lists attached to a contact). Added metadata selected fields to the Auto Summary definition form.

» 6.0.1.4 – RTW (24th October 2013) Enhancement: New version designed to work with CRM2013, replaces the entity and field synchronisation with an HTML5 control and enables many-to-many relationships to be counted.

» 5.2.0.5 – RTW (13th June 2013) Bug Fix: Issue identified with filter query when involving linked tables.

» 5.2.0.2 – RTW (22nd April 2013) Bug Fix: If non-default currency child values were set to update a parent record's non-default currency value, the incorrect result was calculated (the base value was returned).

» 5.2.0.1 – RTW (20th April 2013) Bug Fix: If two 'Sort By' parameters were set in the underlying system view used by the filter query, an error was thrown.

» 5.2.0.0 – RTW (11th March 2013) New Feature: MIN/MAX evaluators. When configuring an Auto Summary Definition, it is now possible to select a MIN or MAX evaluator. This will return the smallest (MIN) or largest (MAX) value of the chosen integer, decimal, or currency field held on the child records meeting the filter criteria.

  o Performance Enhancement: Code enhancements have been made to improve the performance of each auto summary calculation, resulting in less timeout issues with the 2-minute sandboxed limitation imposed by CRM Online. This also makes auto summary far more robust with larger datasets.

  o Fix: An issue identified where more than 500 child records were returned in conjunction with using filter queries didn't correctly summarise has been fixed.

» 5.0.4.36 – RTW (19th October 2012)

  o New Feature: a new option was added to the Auto Summary Definition called 'Execution Trigger'. Valid options are 'All Fields' (as per standard functionality) or 'Manual Execution Field Only'. The latter option ensures the calculation only fires on change of the Manual Execution Field. This can be especially useful if the child records are created or change rapidly, triggering many auto summary calculations. The Manual Execution field could be updated manually or by a workflow in this scenario, after the rapid creation/update has completed. A good example of this is when creating quotes, orders or invoices where product lines are copied

from the precursor record.

NOTE: The manual execution will only trigger if the selected Boolean field is set to TRUE.

» v5.0.4.32 – RTW (9th April 2012)
- o New Feature: a new option has been added to the Auto Summary Definition Calculation Type called "Average". This option will take the sum of all child records, and divide this number by the count of child records, to present the Average value. This will then be stored on the Parent record.
- o New Feature: a new option has been added to the Auto Summary Definition form called "Manual Execution Field". This lookup can be used to select a field on the Parent entity of type "two options". When this field is set to a value of True, then Auto Summary Definition calculation will be re-run for all Child Records. This feature provides the ability to refresh the value on the Parent record without the need for a Child Record to change.
- o New Feature: a significant amount of server processing is required when clicking Publish the first time after Auto Summary is installed. A new feature has been added which disables the automatic synchronisation of new fields after 3 Publish button presses. This feature is designed to save server CPU processing time for customers who don't make many field changes. You can enable the field synchronisation by editing the Interface "Auto Summary Entity and Field Synchronisation". Change the "Synchronisation Count Remaining" to a number higher than 0 to have the latest fields synchronised.
- o New Feature: ability to change the Auto Summary Definition from Real-time to Background Task and from Background Task to Real-time without the need to delete and recreate the Auto Summary Definition record.
- o Enhancement: additional trace logging has been added for troubleshooting issues in customer environments.
- o Enhancement: existing code has been optimised to provide faster execution of calculations for the Auto Summary Definitions.
- o Enhancement: the Auto Summary Definition inactive views have been customised in line with the Active views.
- o Enhancement: minor cosmetic improvements including new Auto Summary icon.

» v5.0.3.24 – RTW (19th October 2011)
- o Bug fix: Auto Summary updates the target field even if the value is the same in the target field. This behaviour has been changed to only update the target if the value is different. This in turn provides a performance enhancement.
- o Bug fix: Currency base fields are now available for selection through the Auto Summary Definition record.

» v5.0.3.22 – RTW (4th October 2011)
- o Enhancement: Child relationship display value updated to display "Child Entity: Field" to replace the current "Parent Entity: Field" naming convention.

» v5.0.2.18 – BETA (31st August 2011)
- o Initial release.

CAUTION - Asynchronous and Sandboxed Processing Service Overload Auto Summary uses the asynchronous processing service (for background processing) and sandboxed processing service (for real time processing).

For CRM Online, there is a 2-minute time out limitation on the execution of system jobs. Please pay attention to the number of auto summary definitions added to a single entity and also scenarios where auto summary definitions result in chains of calculations whereby the result field triggers further auto summary definitions to calculate. Please test your scenarios thoroughly before moving to a production environment. The Asynchronous and sandboxed processing services are outside the control of Auto Summary and so calculations cannot be guaranteed to execute successfully 100% of the time.

For on premise CRM users, the plugin steps which Auto Summary generates can be updated to have an 'isolation mode' of 'none' by using the plugin registration tool which is freely available in the CRM SDK. This will remove the 2-minute limitation on the system job execution.

Section 2 - FAQ

2.1 Why is my target field not updated by an Auto Summary Definition?

a) When you installed Auto Summary, did you select the option to Activate Processes? If not you will need to remove and re-install Auto Summary and select this option.

b) At least one child entity needs to be updated to trigger the calculation which will update the parent entity. At least one child record needs to be added, updated or deleted to trigger the calculation.

2.2 What does the solution cost?

It costs £299. Please visit our website at www.incrementalgroup.co.uk for information on obtaining a licence for your Microsoft Dynamics CRM 2016 Organisation.

2.3 How many environments does the Auto Summary licence cover?

You must purchase 1 licence for each production Microsoft Dynamics CRM instance. License keys for development and test organisations are free.

For example, if you move your Development Organisation through a System Test, UAT and Live environment, then you still only need to purchase 1 licence. If you have two different production instances, running different solutions then you must purchase 2 licences.

2.4 Does Auto Summary work with Microsoft Dynamics CRM Outlook in Offline Mode?

The solution does not execute whilst offline, however when Microsoft Dynamics CRM synchronises when going back online the Auto Summary process will run.

2.5 Does Auto Summary guarantee the results of its calculations?

Although Incremental Group has tested Auto Summary extensively, it is possible that in certain circumstances the figures displayed may not be accurate. For instance, if the parent form is not refreshed by the user. For that reason, Incremental Group recommends that the figures provided by Auto Summary are checked against proven reports before any high risk commercial decisions are taken based on the figures. Incremental Group accepts no liability for any commercial outcomes resulting from use of the figures provided by Auto Summary.

2.6 Can I run Auto Summary outside of the Sandbox for on-premise deployments?

Yes, by using the plugin registration tool provided in the CRM SDK. Please contact us for steps on how to re-configure the Auto Summary solution to run outside of the Sandbox.

2.7   Trial Mode

By default, this solution runs in trial mode. Whilst running in Trial Mode, approximately 1 in every 10 Auto Summary requests will generate a random number. Trial Mode can be removed by applying a license key.

Section 3 - Installation

3.1   Prerequisites

3.1.1   Dynamics CRM On-Premise or Partner Hosted

You must have the following prerequisites installed before installing the Auto Summary for Microsoft Dynamics CRM On-Premise or Partner Hosted:

- » A fully working installation of Microsoft Dynamics CRM
- » A minimum of Rollup 1 installed for Microsoft Dynamics CRM
- » A Microsoft Dynamics CRM Sandbox server role installed
- » A System Administrator security role for your Organisation

3.1.2   CRM Online

You must have the following prerequisites installed before installing the Auto Summary for Microsoft Dynamics CRM Online:

- » An active Microsoft Dynamics CRM Online subscription
- » A System Administrator security role for your Organisation

Section 4 - Installation Steps

Please use these steps to install the Auto Summary:

1. Navigate to Settings > Solutions and import the Auto Summary solution
   NOTE: During import ensure you select the Activate Processes tick box.
2. Once imported, click on Publish All Customizations. Press F5 to Refresh your browser.

Section 5 - Upgrade Steps

5.1   Upgrading requires a new license key to be purchased for the production environment

Although an upgraded CRM2013 (v6.x) Auto Summary solution will continue to function, the CRM 2015 version should be installed then the old CRM2013 solution uninstalled. There is no need to delete and recreate your Auto Summary definitions that were added while using the 2013 solution.

For upgrades from the CRM2011 version to either the CRM2013 or 2015 versions, you must uninstall the CRM2011 version prior to installing the 2013/2015 versions. Please note your Auto Summary definitions prior to uninstalling so that you can re-create them in the new version.

For upgrades from CRM2015 to CRM2015, simply import the CRM2016 solution.

NOTE: A NEW license key will be required with the installation of a new version.

1. Import the new version of Auto Summary
2. Click 'Publish All'
3. Uninstall the CRM2013 AutoSummary solution (if applicable).

5.2   Requesting a Licence Key

To request a licence key for your Auto Summary please follow these steps:

1. Navigate to the customisations area of CRM. Click on Customisations
2. Click on Developer Resources
3. Copy and paste the Organisation Unique Name send a licence key request to support@incrementalgroup.co.uk

5.3   Installing a Licence Key

To install a licence key for your Auto Summary please follow these steps:

1. Navigate to Settings > Interfaces
2. Open the Auto Summary Generation interface
3. Double click to open the Licence Key interface parameter record
4. Copy and paste your licence key into the value field to replace the "Trial Version" value
5. Save and close the Interface Parameter. Auto Summary will now operate in licenced mode.

5.4   Uninstallation Steps

To remove Auto Summary please perform the following two steps. The steps apply to all current releases.

1. Navigate to the Auto Summary Definitions entity in the Settings area. Click on each Auto Summary Definition and press the delete key to remove this record.
2. Publish all customisations
3. Navigate to the Solution area in Settings. Click on Auto Summary, click delete, and follow the instructions.
NOTE: If CRM shows an error regarding the inability to uninstall the solution due to dependencies, then manually delete any SDK Message processing steps related to AutoSummary within the default solution. This can be done by navigating to Settings > Customization > Customizations > Customize the System > Sdk Message Processing Steps highlight any steps with a name beginning with 'Gapconsulting.MSCRM.Plugin.AutoSummary'. Once done, the solution will be able to be deleted (uninstalled).

Section 6 - Configuration

6.1.1 Information

The Incremental Group Auto Summary Solution can be used against any customisable entity and field including custom entities and fields. The calculation is configured by creating an Auto Summary Definition.

NOTES:

1. Before you create the Auto Summary definition, ensure that the parent entity has a field already created to hold the result of the calculation, and that the field is displayed on the entity's form. This receiving field must be of type Double, Money, Decimal or Integer.
2. Care should be taken not to create two definitions which use the same target field as this can generate unintended results.
3. In order to see the results of any Auto Summary Definitions you will need to create, update or delete one of the children of the parent record which will trigger the calculation.

6.1.2 Creating a new Auto Summary Definition

To create a new Auto Summary Definition, follow the below steps:

1. Navigate to Settings, Navigate to the group labelled "Gap Consulting Ltd." and click "Auto Summary Definitions" and then click "New".
2. Enter a descriptive name for the Auto Summary (e.g. sum opportunities for account) .
3. Select the "Calculation Type" (Sum, Count or Average).
4. Select the "Execution Mode". Please note that selecting "Real Time" has an impact on resources and may affect the performance of the system.
5. Configure the parent entity (the record on which to store the results of the calculation):
   a. In the "Parent Definition" section, select the "Parent Entity" and then select the "Parent Field" into which the result of the calculation should be placed.
   b. (Optional): In the "Parent Definition" section, select the "Manual Execution Field". This can be used to recalculate all child records.
6. Configure the child entity (the records on which to perform the calculation):
   a. In the "Child Definition" section, click the lookup beside the field labelled "Child Relationship" and select the relationship which links the parent record to the records which you need to perform the calculation on.
   b. If the calculation is of type "Sum, Average, Min or Max", select the field which needs to be summarised by clicking the "Child Field" lookup.
7. Filter the records to be summarised (optional). In some circumstances you may need to filter the records returned. For example, you can count the number of contacts on an account, or you could

filter it to count only the number of Account Managers in the business. To achieve this example proceed as follows:

a. Click the "Filter Query" lookup
b. If the query is already created select the query required and go to step 7f, otherwise click "New"
c. Give the filter a name (in this case "Filter Account Managers") and select the entity being counted (in this case "Contact")
d. Add a query line, (in this case Title = "Account Manager")
e. Click "View Records" to test the query
f. Click "Save and Close"
g. Click "OK" to return to the Auto Summary Definition
h. Click "Save and Close".

Your setup is complete - now test your new Auto Summary calculation in the parent entity within Microsoft Dynamics CRM.

6.1.3   Security

There is a security role available within the Auto Summary Solution called "Auto Summary Generation (for All Users)". This security role must be given to all users who require the ability to run the calculations defined in the Auto Summary Definition records.

Section 7 - Operation

7.1   Caution – Use the correct field

The nature of the Auto Summary solution means that data is over-written in the target field in the parent entity when the calculation runs. Therefore it is essential that you select the correct field during setup to prevent the wrong information being over-written.

7.2   How to enable logging

Auto Summary for Microsoft Dynamics CRM 2013 provides two levels of runtime logging - Event Logging and Trace Logging. Please note, for live operation logging should always be disabled.

If you require support, you could be asked to enable to enable logging for Auto Summary which is based on the following steps:

1. Navigate to Settlings > Interfaces.
2. Open the Auto Summary Generation interface (or the interface required).
3. In the Interface Options & Parameters section click to enable the logging type required, save and close.
4. Run Auto Summary by creating a new record which is configured with an Auto Summary Definition record.
5. Open the interface record again. You should now see a new Interface Job record. Double click to open the Interface Job Record for detailing logging information.

7.3   Field Types

During the creation of an Auto Summary Definition record, only those fields which are suitable will be displayed in the lookup. If the field you wish to update is not displayed, it is probably not a supported field type.

7.4   Isolation

For on-premise deployments only, the Auto Summary plugin can be amended to run with no isolation. This means it is not constrained by the 2-minute timeout limitation imposed by the sandboxed service. Although this should rarely be required, this remains an option if any failed system jobs are produced due to SQL timeout errors. See the following msdn article for guidance on changing the isolation mode of a plugin; http://msdn.microsoft.com/en-us/library/gg695782.aspx#Register. In the example shown, simply edit the Auto Summary plugin and change the isolation mode to 'None'.

7.5   Support

If you require support for our Auto Summary for Microsoft Dynamics CRM product, please contact us at support@incrementalgroup.co.uk.