

# North52 LaunchPad

The fun and free way to learn North52!



## North52 Decision Suite Installation Guide

Learn more about North52 products at our [online knowledge base \(support.north52.com\)](https://support.north52.com)



Launch BPA Knowledge Base



Launch TestShield Knowledge Base



Launch DP Knowledge Base

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# Install & Configuration

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## Step 1: Install and Accept License

The North52 BPA solution can be downloaded from the following location:

<https://www.north52.com/business-process-activities/download-solution/>

The installation and configuration process is currently documented via the training video below:



[Open video on YouTube](#)

## Step 2: Configure Security Roles

As part of the installation two security roles are created within your Dynamics 365 system:

- North52 BPA - Administrator
- North52 BPA - Standard

These security roles allow users to use formulas within the system. As a requirement ALL users of the system should have at least one of these roles assigned.

### North52 BPA - Administrator

This security role is to be assigned to any users of the system that need to perform create/update/delete operations on formulas within the system.

### North52 BPA - Standard

This is the standard security role which allows users to read formula data and therefore execute formulas when an action is carried out. This security role should be assigned to all users of the system that **do not** have the *North52 BPA - Administrator* role.

**Note:** When a user has the System Administrator role within Dynamics 365 then there is no requirement to assign one of the North52 BPA roles.

# How to - Accept the license agreement

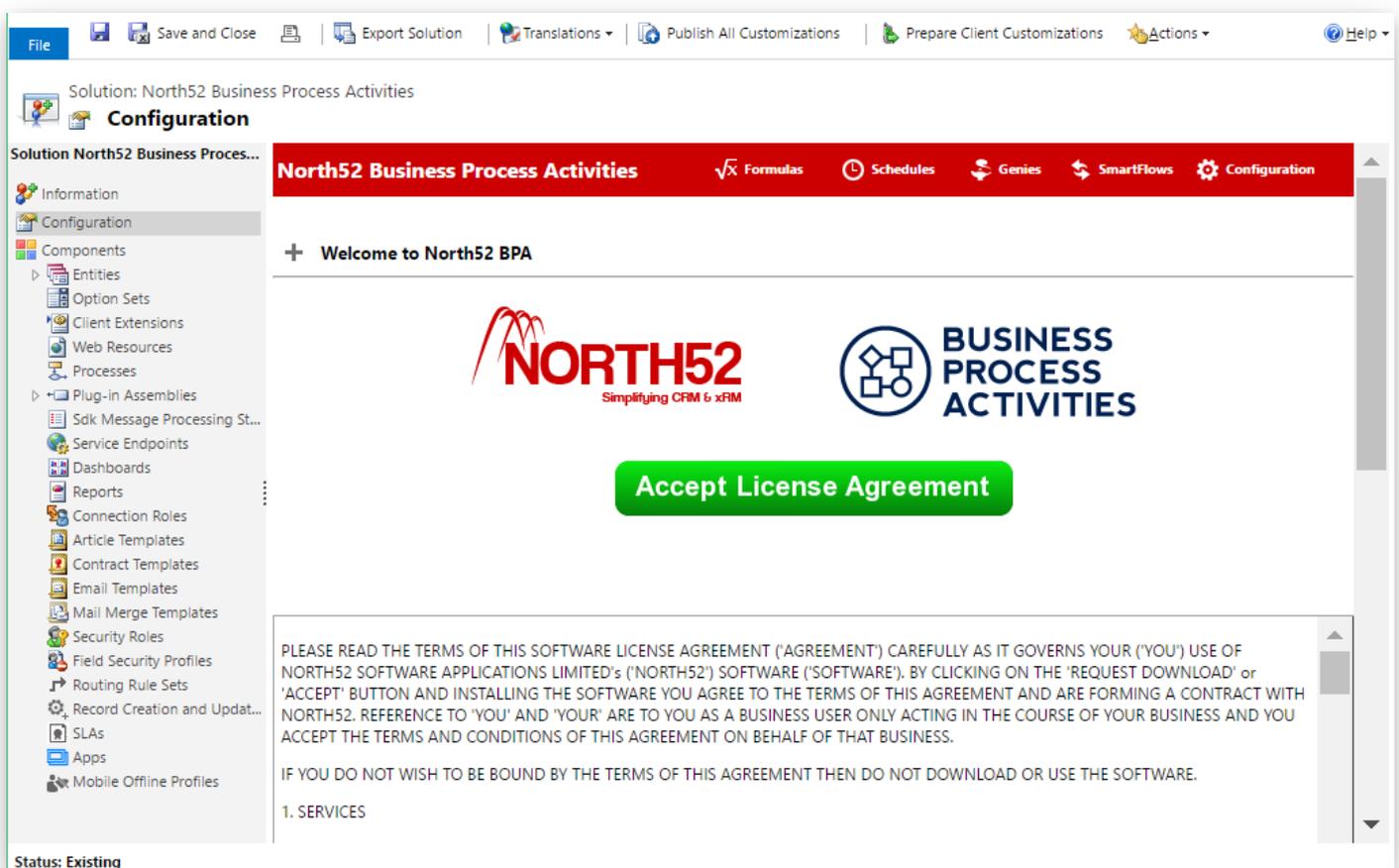
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## Overview

After you install North52 BPA you will need to accept the license agreement before you can create & use any formulas. The following set of steps will walk you through this process.

## Accept the license agreement

- Navigate to the list of solutions within your CRM deployment as shown in the first screenshot below.
- When the list appears double click on the North52 Business Process Activities one.
- Next click on the left hand navigation link named 'Configuration'.
- Now you should see two buttons as shown in the second screenshot.
- Click on the 'Accept license Agreement' button to accept the license.
- The process should take around 10 seconds & you should see the final screenshot below if all goes well.



# How to - Retrieve Unique Organization ID

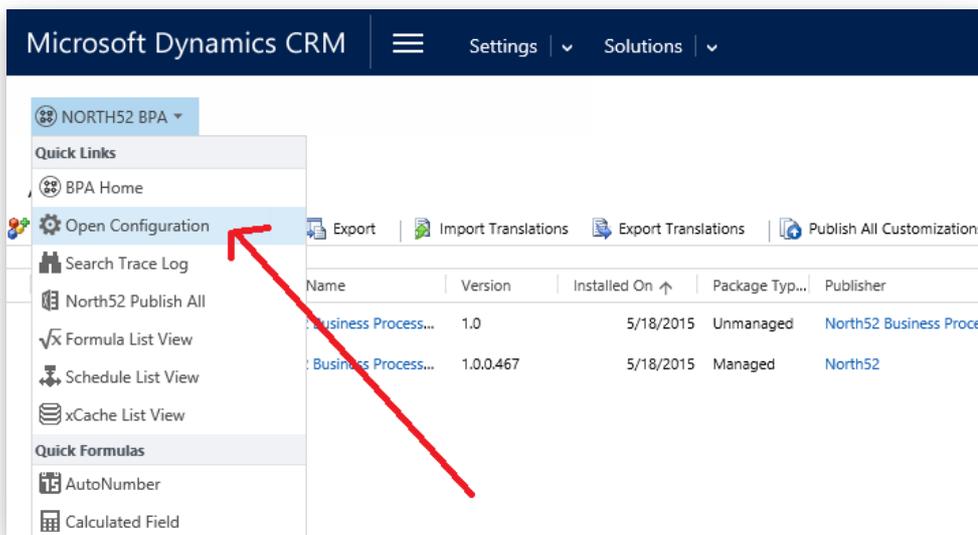
[TOC]

## Overview

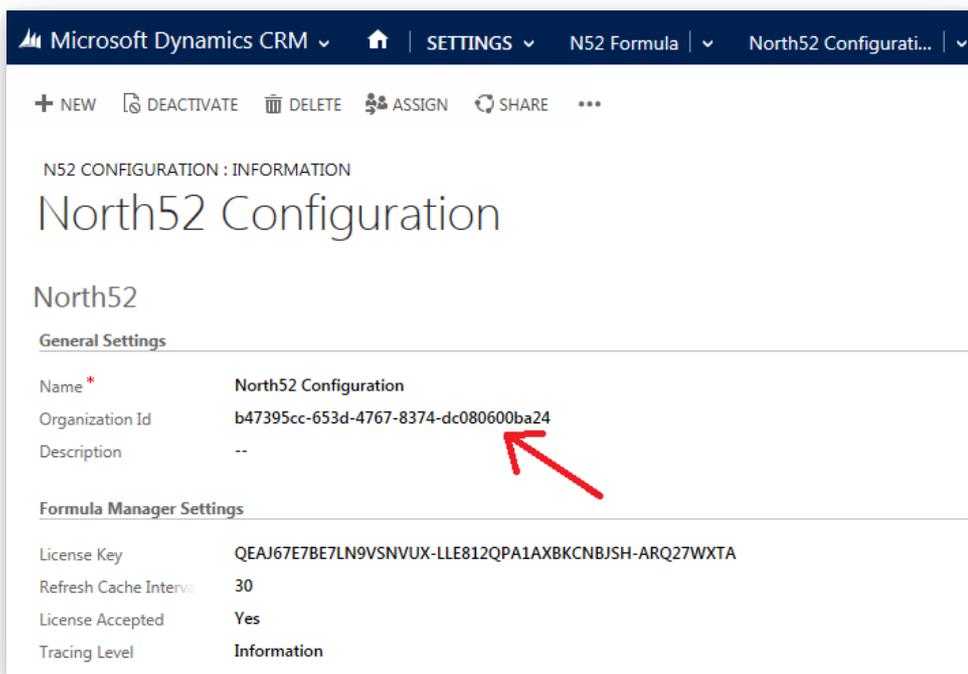
This set of steps will show you how to retrieve your unique organization ID for your Dynamics CRM deployment.

## Retrieve Organization ID - Method 1

- Navigate to Settings -> Solutions
- Click 'North52 BPA'
- Click 'Open Configuration'



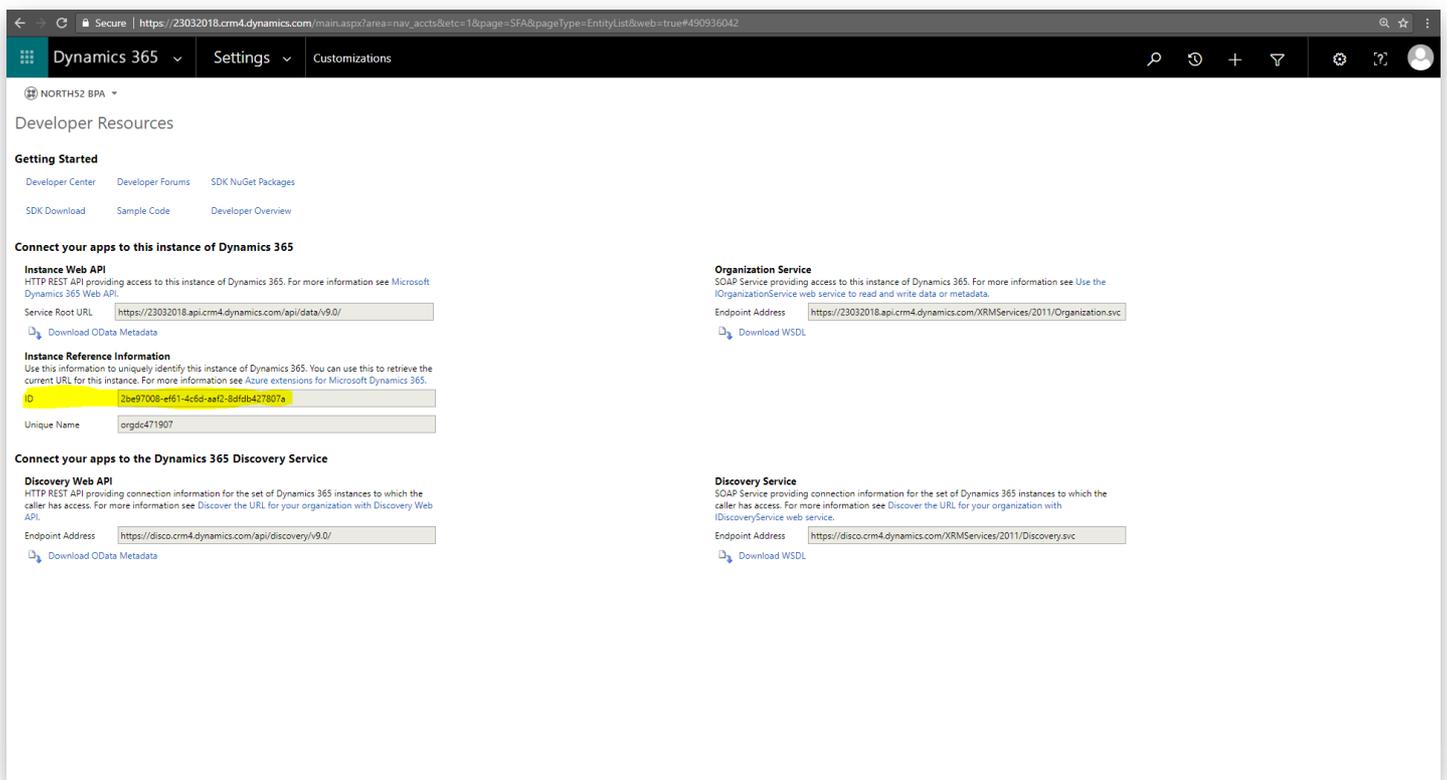
- Now the N52 Configuration entity will open
- Next find the field labelled Organization Id as shown in the screenshot below
- Now you can use this ID when making a purchase of N52 BPA Online
- Alternatively you can just send this Id to your contact at North52



## Retrieve Organization ID - Method 2

Go to Settings > Customizations > Developer Resources

Your Org ID is under Instance Reference Information.



The screenshot shows the Dynamics 365 Developer Resources page for instance NORTH52 BPA. The page is divided into several sections:

- Getting Started:** Links to Developer Center, Developer Forums, SDK NuGet Packages, SDK Download, Sample Code, and Developer Overview.
- Connect your apps to this instance of Dynamics 365:**
  - Instance Web API:** HTTP REST API providing access to this instance of Dynamics 365. Service Root URL: `https://23032018.api.crm4.dynamics.com/api/data/v9.0/`. Download OData Metadata.
  - Instance Reference Information:** Use this information to uniquely identify this instance of Dynamics 365. ID: `2be97008-e161-4c6d-aa12-8dfdb417807a`. Unique Name: `orgdc471907`.
  - Organization Service:** SOAP Service providing access to this instance of Dynamics 365. Endpoint Address: `https://23032018.api.crm4.dynamics.com/XRMServices/2011/Organization.svc`. Download WSDL.
- Connect your apps to the Dynamics 365 Discovery Service:**
  - Discovery Web API:** HTTP REST API providing connection information for the set of Dynamics 365 instances to which the caller has access. Endpoint Address: `https://disco.crm4.dynamics.com/api/discovery/v9.0/`. Download OData Metadata.
  - Discovery Service:** SOAP Service providing connection information for the set of Dynamics 365 instances to which the caller has access. Endpoint Address: `https://disco.crm4.dynamics.com/XRMServices/2011/Discovery.svc`. Download WSDL.

# How to - Apply your license key

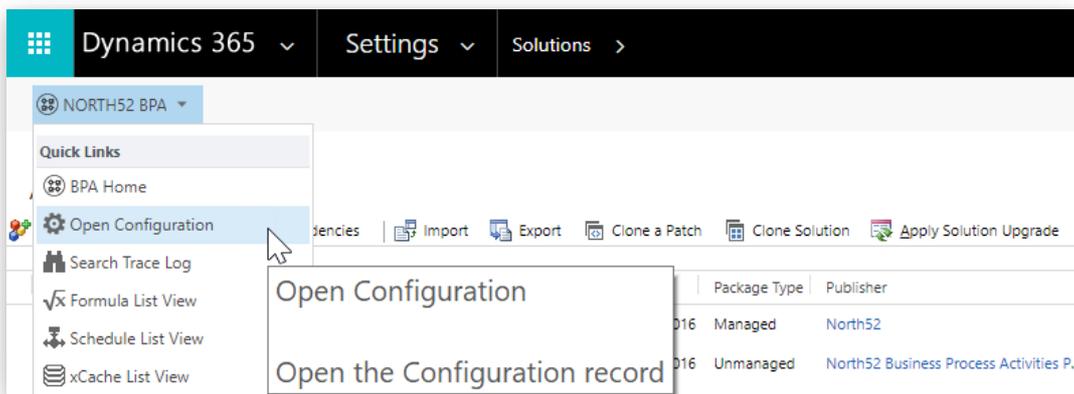
[TOC]

## Overview

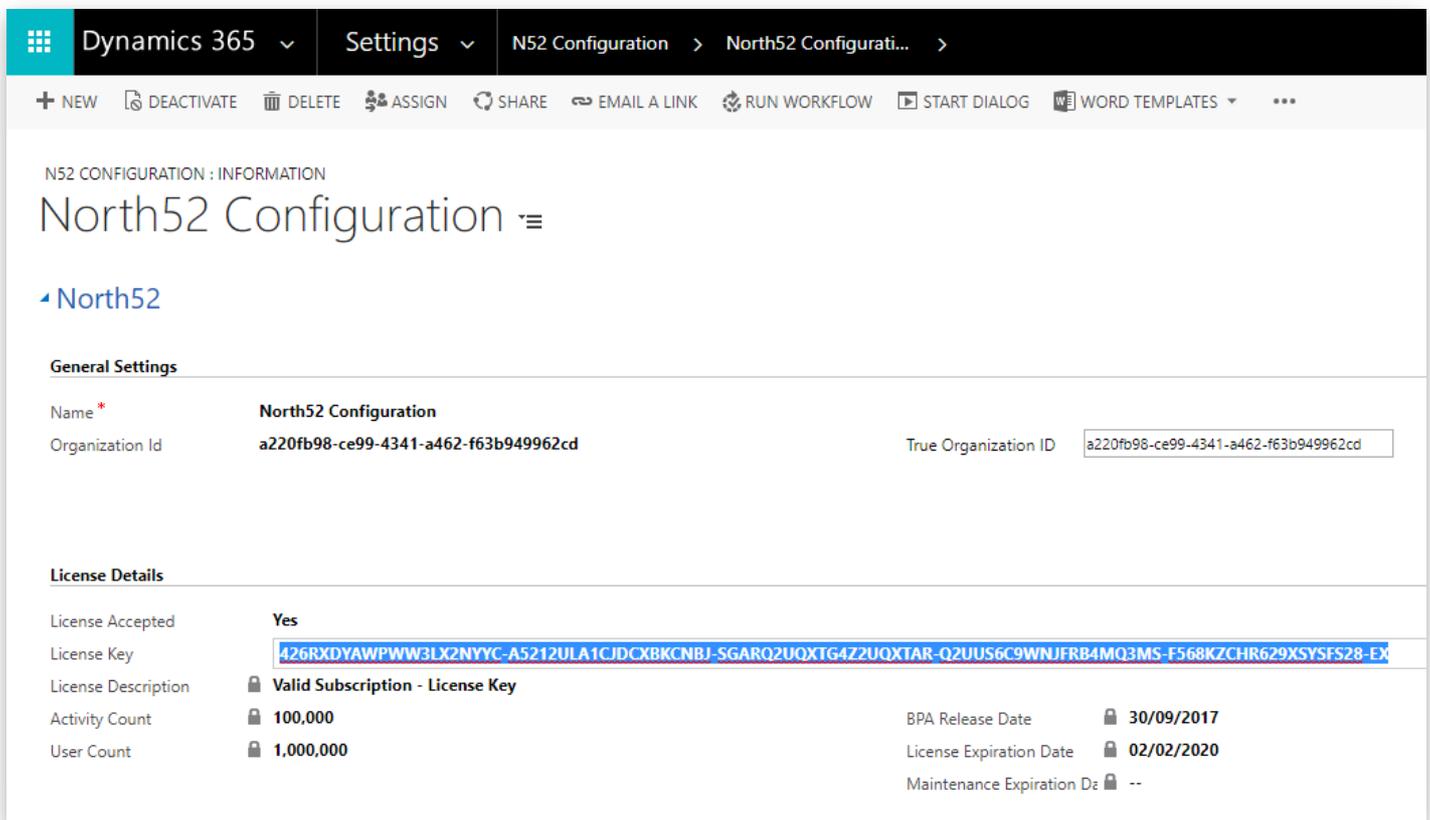
This set of steps will show you how to apply your license key for your Dynamics 365/CRM deployment.

## Apply License Key

- Navigate to Settings -> Solutions
- Click on the North52 BPA menu
- Click Open Configuration



- On the Configuration form find the field labelled License Key as shown in the screenshot below
- Paste in the supplied License Key
- Click Save in the bottom right hand corner



# How to - Install Data Maps

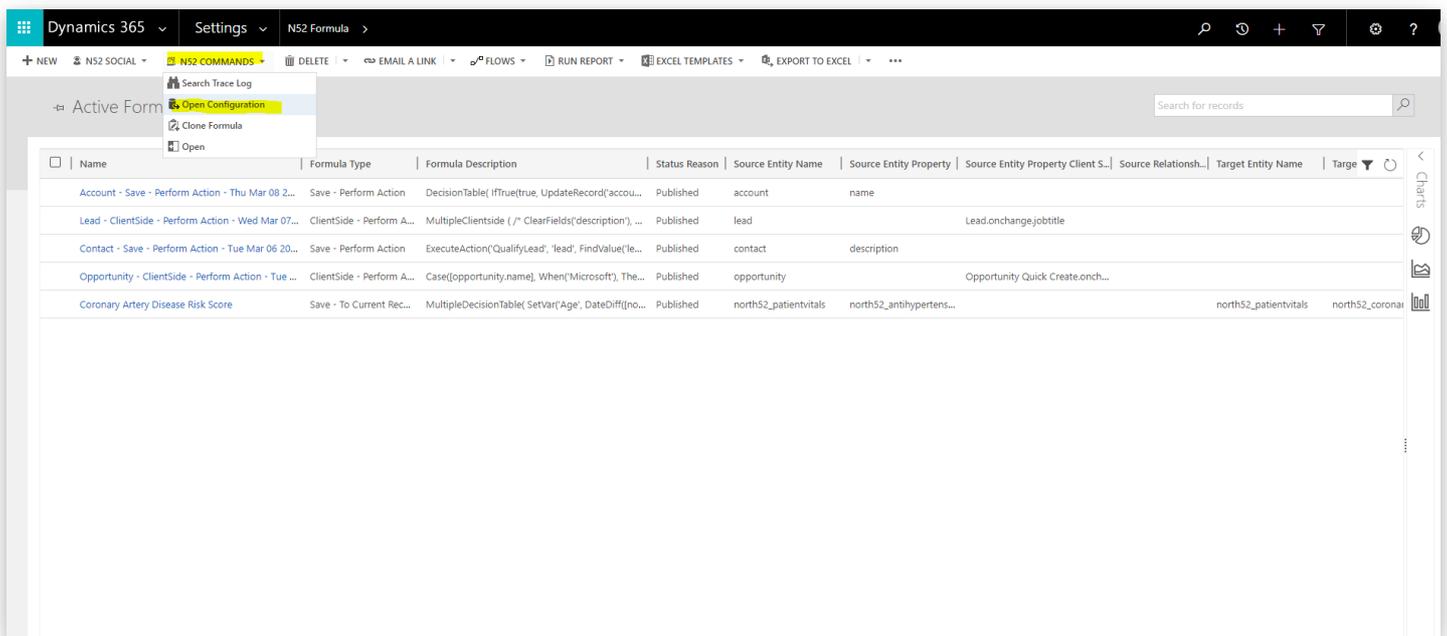
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## Overview

Normally our data maps install by default but if you started on an older version of N52 BPA or deleted them by mistake then its easy to just re-install them. All you need to do is follow the set of steps below.

## Re-Install Data Maps

- Navigate to the formula list within Dynamics CRM.
- Next click on N52 Commands > Open Configuration button on the ribbon.



The screenshot shows the Dynamics CRM interface with the 'N52 COMMANDS' ribbon selected. The 'Open Configuration' button is highlighted. Below the ribbon, a table lists various formulas with columns for Name, Formula Type, Formula Description, Status Reason, Source Entity Name, Source Entity Property, Source Entity Property Client S..., Source Relationsh..., Target Entity Name, and Target.

Name	Formula Type	Formula Description	Status Reason	Source Entity Name	Source Entity Property	Source Entity Property Client S...	Source Relationsh...	Target Entity Name	Target
Account - Save - Perform Action - Thu Mar 08 2...	Save - Perform Action	DecisionTable( IfTrue(true, UpdateRecord('accou...	Published	account	name				
Lead - ClientSide - Perform Action - Wed Mar 07...	ClientSide - Perform A...	MultipleClientside ( / * ClearFields('description'), ...	Published	lead			Lead.onchange.jobtitle		
Contact - Save - Perform Action - Tue Mar 06 20...	Save - Perform Action	ExecuteAction('QualifyLead', 'lead', FindValue('le...	Published	contact	description				
Opportunity - ClientSide - Perform Action - Tue ...	ClientSide - Perform A...	Case({opportunity.name}, When('Microsoft), The...	Published	opportunity			Opportunity Quick Create.onch...		
Coronary Artery Disease Risk Score	Save - To Current Rec...	MultipleDecisionTable( SetVar('Age', DateDiff(fno...	Published	north52_patientvitals	north52_anthypertens...			north52_patientvitals	north52_coronari...

- Now the N52 Configuration entity will open
- Next you need to choose 'Install Data Maps' from the command pick list under 'System Settings'.
- Finally just click the save button on the ribbon, wait a few seconds for the save to complete which will also install the data maps for you.
- You can now check to see that the out of the box data maps have been installed.

Dynamics 365 Settings N52 Configuration North52 Configurati...

NEW DEACTIVATE DELETE ASSIGN SHARE EMAIL A LINK RUN WORKFLOW START DIALOG FLOWS

N52 CONFIGURATION : INFORMATION  
North52 Configuration

Activity Count	0	BPA Release Date	28/02/2018
User Count	0	License Expiration Date	
		Maintenance Expiration Date	

**Formula Manager Settings**

Tracing Level	Information (Show Exception Details)	Refresh Formula Cache	3/8/2018 1:31:18 PM
Refresh Cache Interval (Secs)	30	Refresh User Cache	3/6/2018 9:26:50 AM
Publish Auto	Yes	Refresh Metadata Cache	3/6/2018 9:26:50 AM
Publish Count	10	Refresh XCache	3/2/2018 12:19:36 PM

**System Settings**

System Settings

Command **Install Data Maps**

Command Parameter

Bing Translator ClientID Open Exchange Rates AppID

- If there are any issues or you receive any further error messages please contact our support team via this website or email [support@north52.com](mailto:support@north52.com)

# North52 - Bulk Delete System Jobs

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## Bulk Delete System Jobs

When you install North52 BPA several bulk delete jobs are installed into the CRM organization. These bulk delete jobs perform house-keeping operations on some of the North52 entities. The house-keeping involves deleting records from the following North52 entities,

- North52 Command
- North52 Trace
- North52 Formula Calculation

These entities contain temporary data such as trace information which we clean up using the bulk delete jobs on a daily basis. These system jobs will not affect any other operations within Dynamics CRM. The names of the system jobs are listed below & you can see their daily operation under the 'System Jobs' section of Dynamics CRM.

- North52 Command Bulk Delete
- North52 Trace Bulk Delete
- North52 Formula Calculation Bulk Delete

### Un-Install Procedure

- Navigate to Settings -> Data Management -> Bulk Record Deletion
- Change the view to 'Recurring Bulk Deletion System Jobs'
- Select all the North52 related jobs & then under the 'More Actions' menu click cancel

# How to - Upgrade North52

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## Upgrading North52

Depending on your environment, you may encounter different steps for upgrading.

For Dynamics 365 Online deployments, please see the first section below.

For all other deployments, see the second section: [All Other Deployments](#).

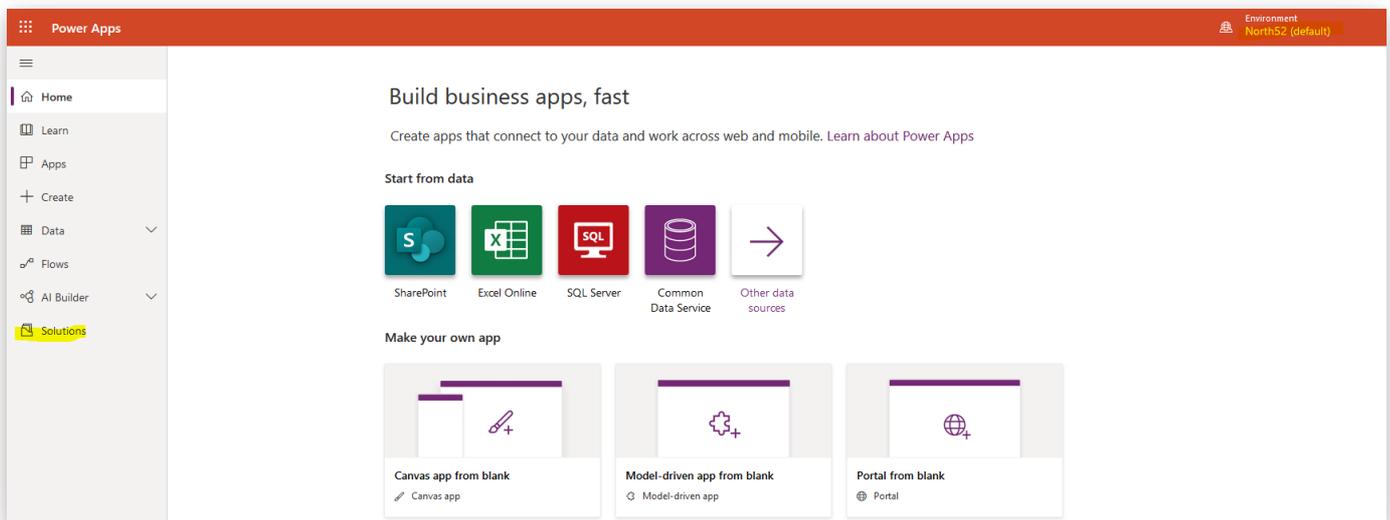
## Dynamics 365 Online deployments

### Step 1: Download Solution

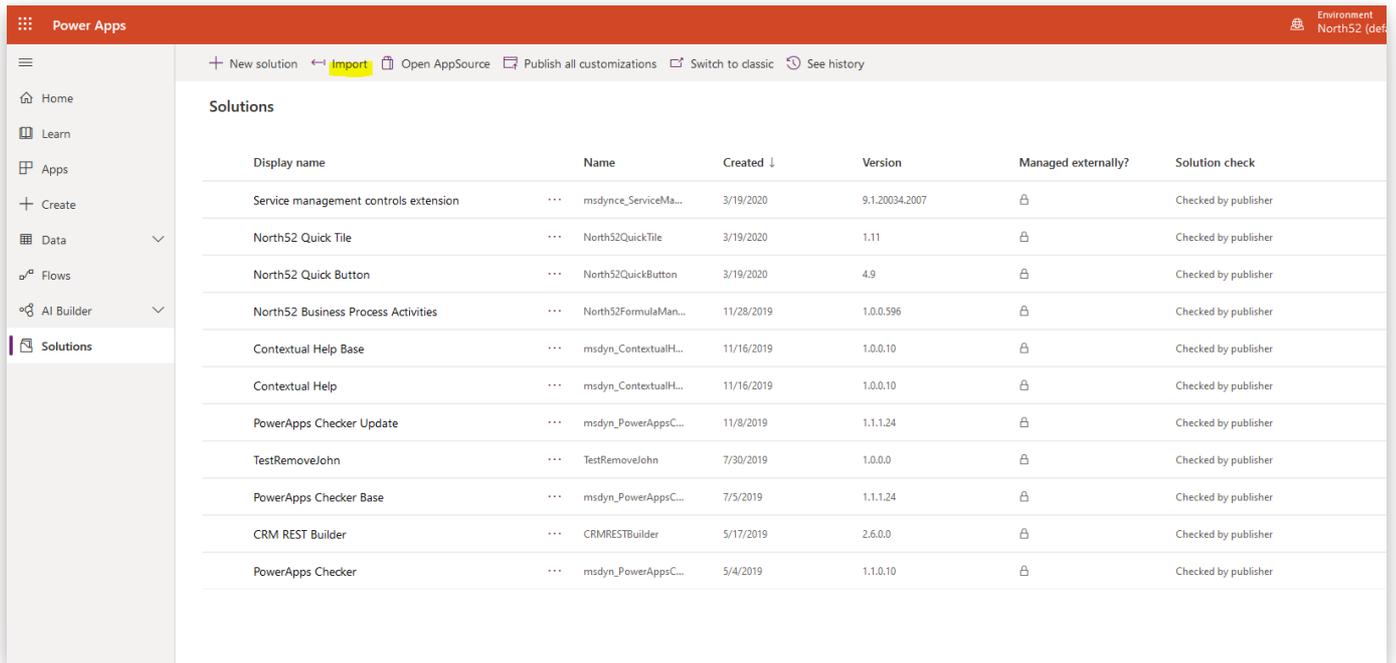
The North52 Decision Suite solution can be downloaded from the following location: [www.north52.com/download-solution/](http://www.north52.com/download-solution/)

### Step 2 : Import Solution

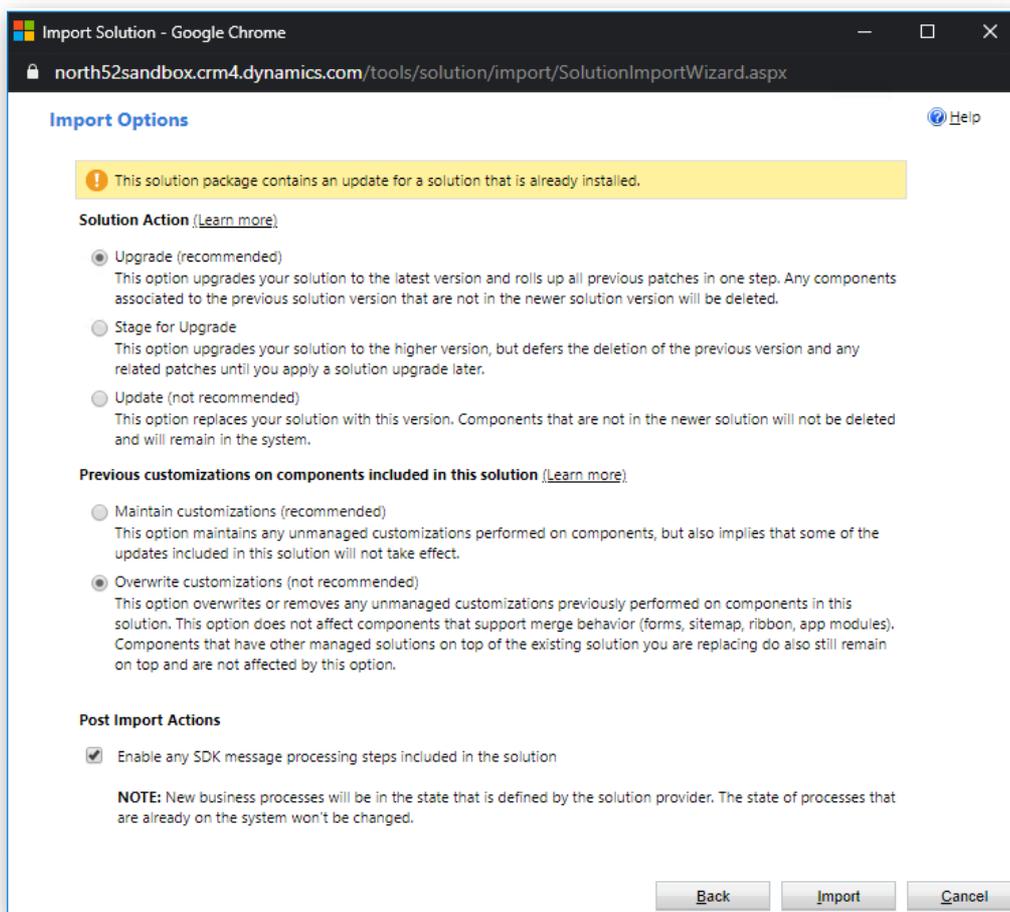
- Signin to [make.powerapps.com](http://make.powerapps.com)
- Select the target environment you want, and then select **Solutions** from the left navigation



- On the command bar, select **Import**



- Find and select the North52 solution you previously downloaded
- For Solution Action, select Upgrade (recommended)
- For Previous customizations on components included in this solution, select Overwrite customizations



- Select Import and follow instructions

## All other deployments

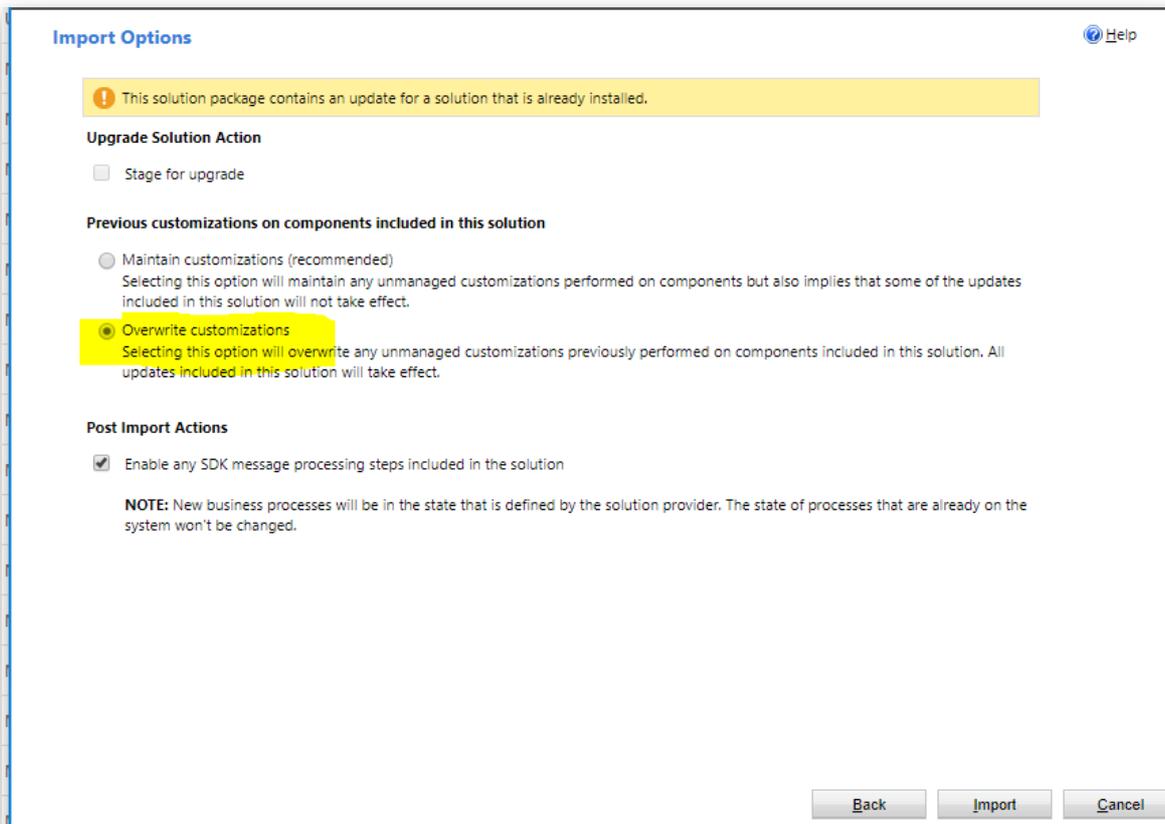
## Step 1: Download Solution

The North52 Decision Suite solution can be downloaded from the following location: [www.north52.com/download-solution/](http://www.north52.com/download-solution/)

## Step 2 : Import Solution

We import the upgrade using the solution wizard:

- Go to **Settings > Solutions**
- Click on **Import**
- Click on **Choose File**
- Find and select the **North52 solution** you previously downloaded
- Click on **Next**
- Click **Next** again
- Under **Previous Customizations on Components** included in this solution, select 'Overwrite Customizations'
- Click **Import**
- Wait for it to finish



**Import Options** Help

**!** This solution package contains an update for a solution that is already installed.

**Upgrade Solution Action**

Stage for upgrade

**Previous customizations on components included in this solution**

Maintain customizations (recommended)  
Selecting this option will maintain any unmanaged customizations performed on components but also implies that some of the updates included in this solution will not take effect.

Overwrite customizations  
Selecting this option will overwrite any unmanaged customizations previously performed on components included in this solution. All updates included in this solution will take effect.

**Post Import Actions**

Enable any SDK message processing steps included in the solution

**NOTE:** New business processes will be in the state that is defined by the solution provider. The state of processes that are already on the system won't be changed.

Back Import Cancel

# How to - Uninstall - North52 BPA

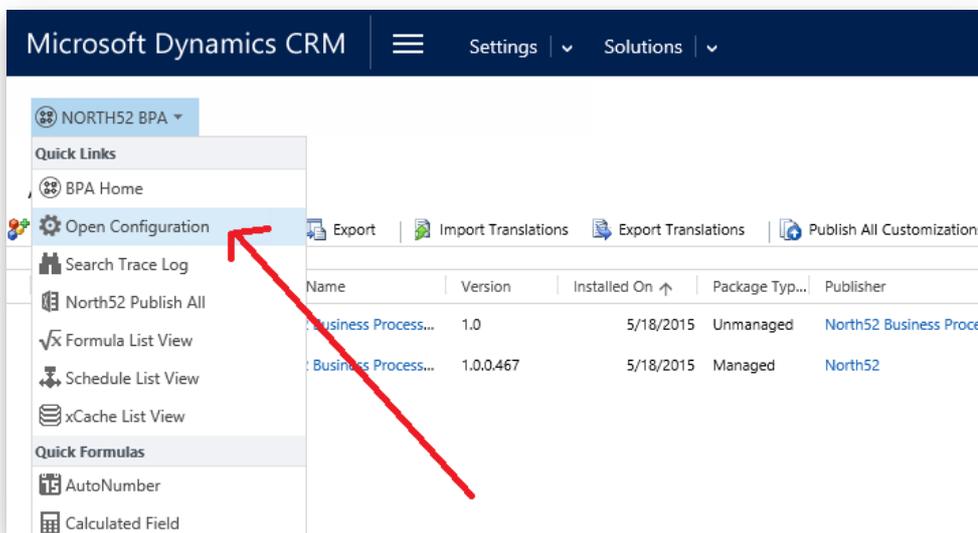
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## Introduction

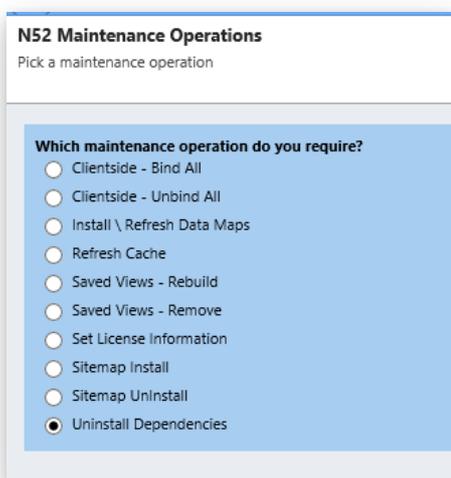
If you need to uninstall North52 BPA you can follow these set of steps to do so.

### North52 Uninstall Dependencies

- Navigate to Settings -> Solutions
- Click 'North52 BPA'
- Click 'Open Configuration'
- When the record opens then click 'Start Dialog' from the command menu
- Select to run the North52 Maintenance Operations dialog
- Next choose the Uninstall Dependencie option
- Click next, this may take 1-2 minutes to complete
- Then click finish and finally close the dialog
- Finally, navigate to the list of Solutions within Dynamics CRM
- Then delete the solution with the name North52 Business Process Activities



### North52 BPA Maintenance Operations



The steps listed below are the ones required if you need to perform a manual un-install.

## Manual Un-Install

- Delete all formulas (both active & non-active) within the system.
- Delete all schedules (both active & non-active) within the system.
- Delete any workflows, actions or dialogs which contain a reference to the North52 Process Genie custom workflow activity step
- Remove any North52 WebResources from forms you may have placed them on & perform a Publish All.
- Modify the sitemap to remove the reference to the North52 group element under Settings
- Remove the installed Bulk Record Deletion Jobs.
  - Navigate to **Settings -> Data Management -> Bulk Record Deletion**
  - Change the view to 'Recurring Bulk Deletion System Jobs'
  - Select all the North52 related jobs & then under the 'More Actions' menu click cancel
- Remove the installed Data Maps.
  - Navigate to **Settings -> Data Management -> Data Maps**
  - Select all North52 related data maps & click the delete button
- Remove the solution.
  - Navigate to **Settings -> Solutions**
  - Select the solution 'North52FormulaManager' & click the delete button

## Additional Steps

If for some reason you still cannot delete the solution you

- Navigate to **Settings -> Customizations**
- Click on Plug-In Assemblies
- Next click on the node North52.FormulaManager
- Select the record with the name 'N52 Process Genie'
- Click the menu option 'Show Dependencies'
- Remove any of the dependencies that it shows