CHEWSOFT FILE TRANSFER

HELP GUIDE

// **chewonthis** software

Version 1.0

1. CONTENTS

2. INTRODUCTION

Welcome to the ChewSoft File Transfer service for Dynamics 365. This document will guide you through the process of installing and configuring File Transfer service 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 File Transfer service.

Alternatively, you can purchase a Premium Support Package from Chewonthis Software Ltd and one of our support team will guide you through the process.
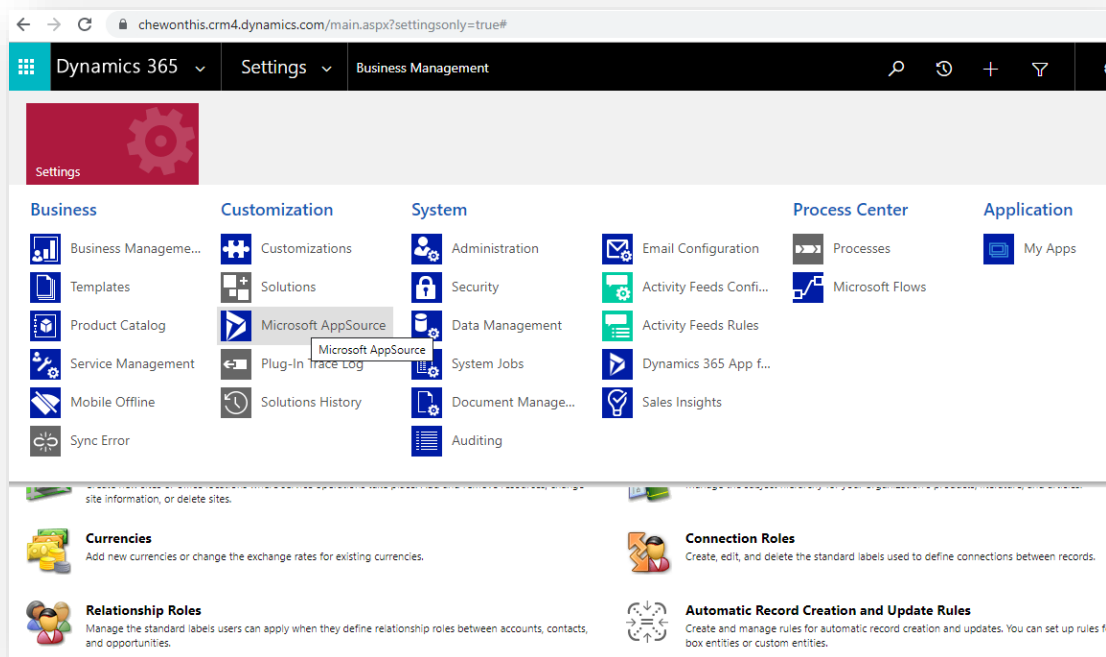
3. INSTALLATION

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 File Transfer.
4. On the ChewSoft File Transfer Service select "Free Trial" and follow the installation steps.
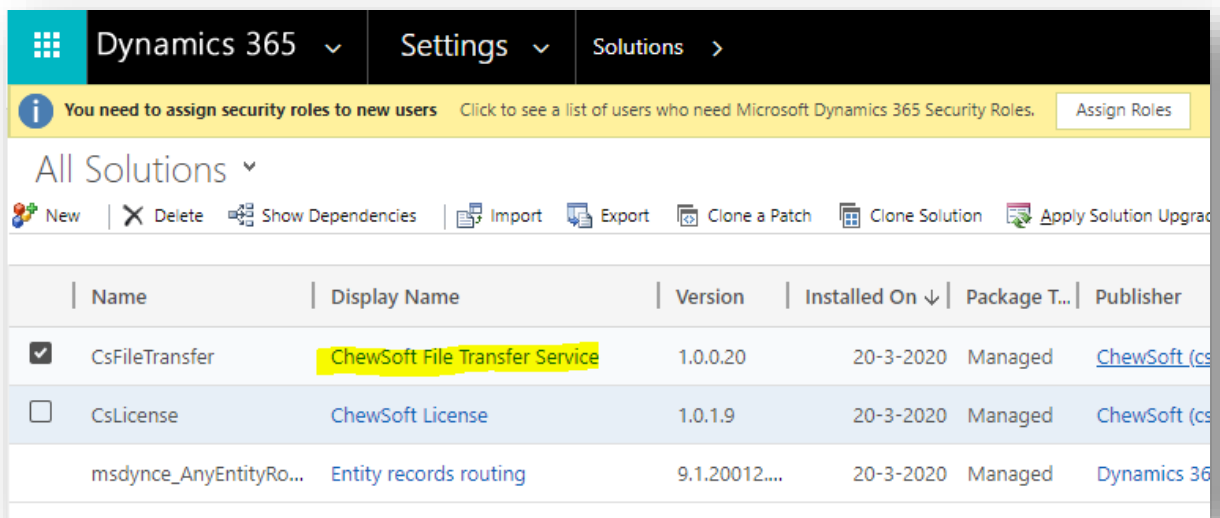
4. CONFIGURING THE FILE TRANSFER SERVICE

4.1   CONFIGURATION PROCESS

Once the installation process has completed, the File Transfer Service 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 "ChewSoft File Transfer"

4. In the window that opens, enter your organisation's technical contact details for the File Transfer service.
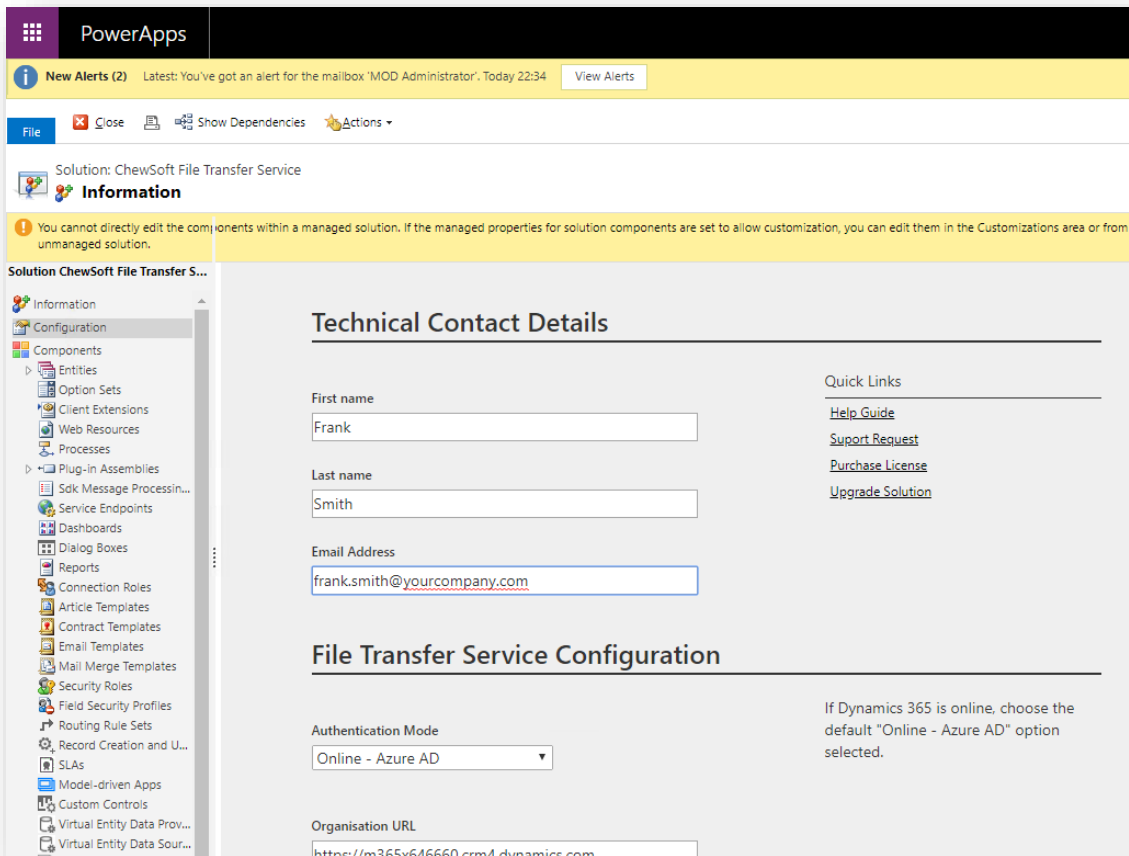
5. Leave the Authentication Mode as "Online – Azure AD"
6. Check the Organisation URL is set correctly for the current instance of Dynamics 365.
7. Click Save.
8. A new window will open prompting you to login. Login with a user account that has administrator permissions on the Azure Active Directory Dynamics 365 is linked to.
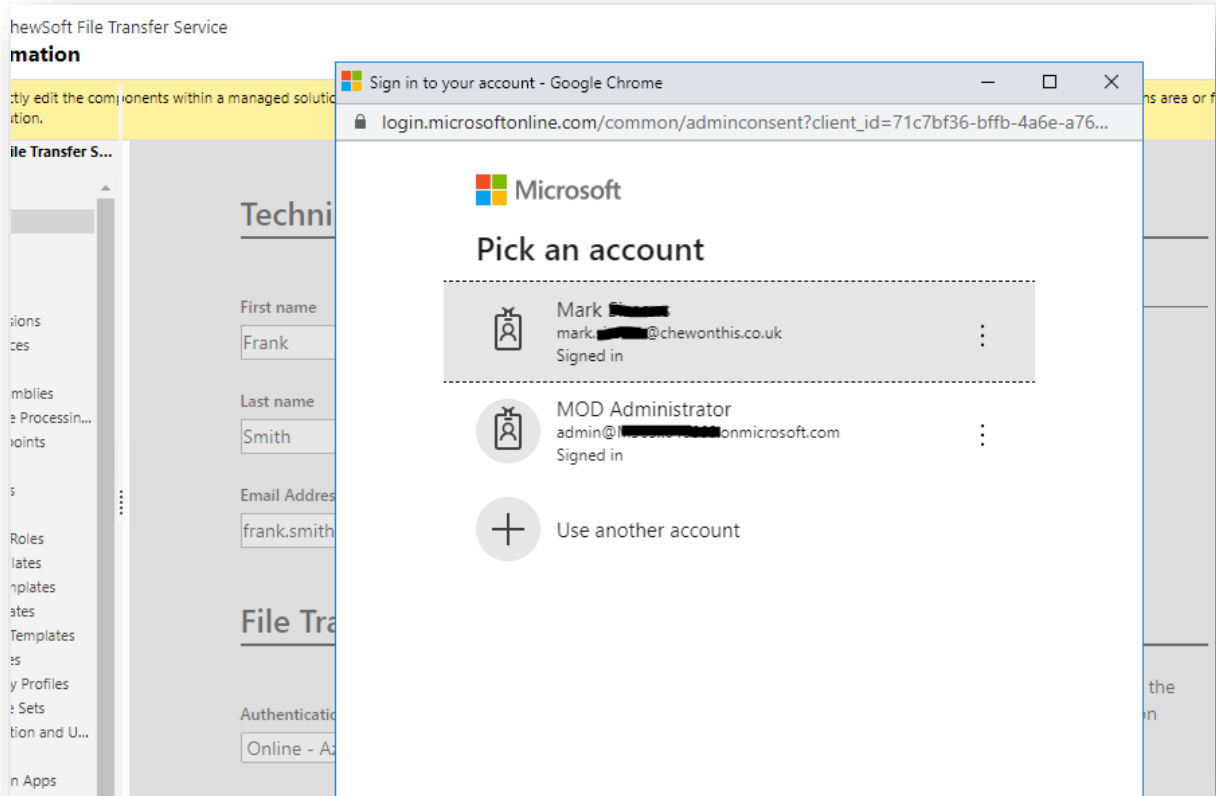
9. You will be prompted to Accept granting permission to the File Transfer Service to be registered within your Azure Active Directory. Click Accept.
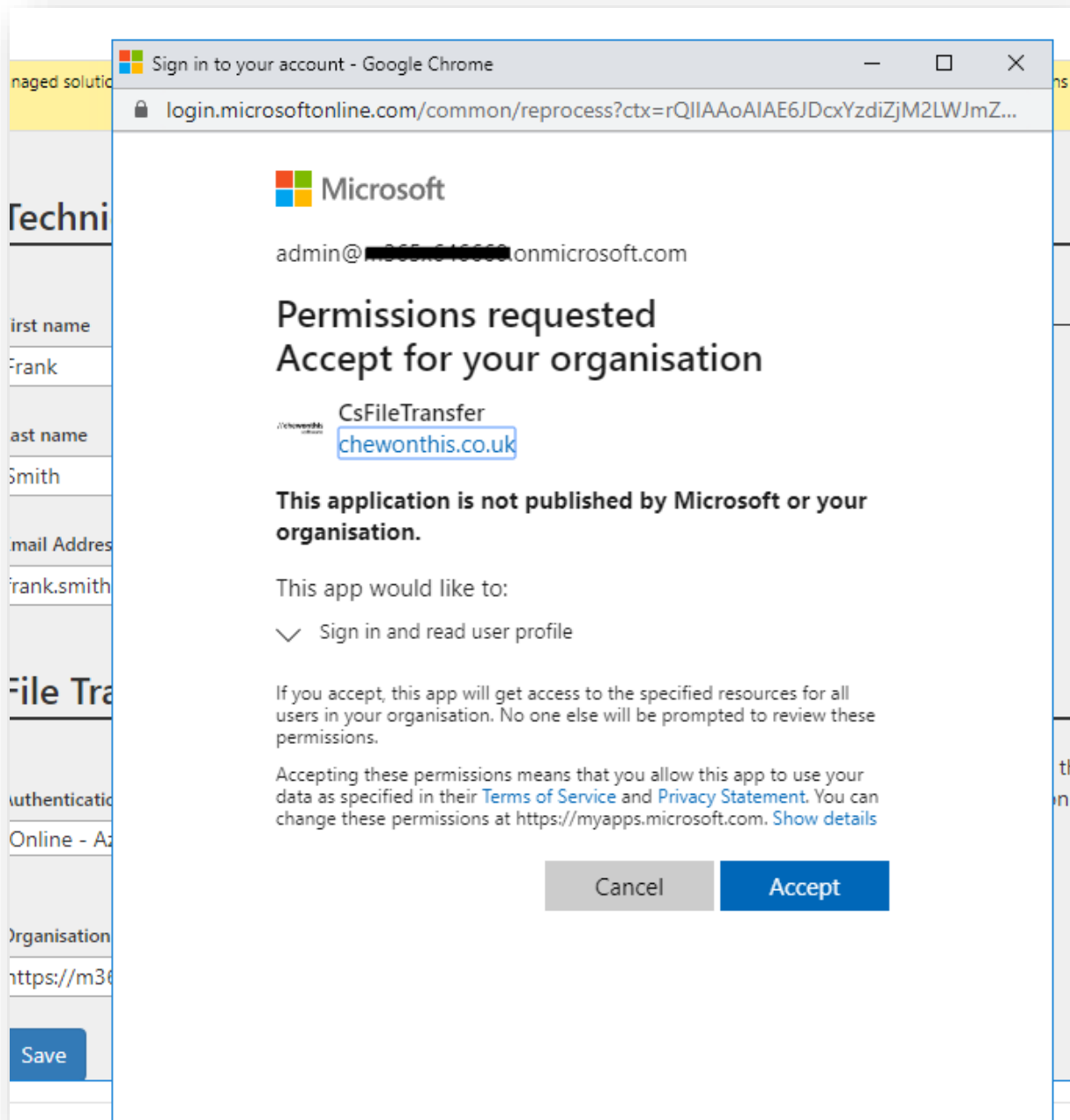
NB. AT THIS POINT YOU ARE REGISTERING THE FILE TRANSFER SERVICE ACCOUNT WITHIN YOUR AZURE ACTIVE DIRECTORY. HOWEVER, IT DOES NOT HAVE ANY PERMISSIONS WITHIN DYNAMICS 365 UNTIL YOU GRANT IT THE NECESSARY PERMISSIONS. THIS IS DONE IN THE FOLLOWING STEPS.

10. Once you have successfully granted permissions a "Consent Granted" message is displayed.
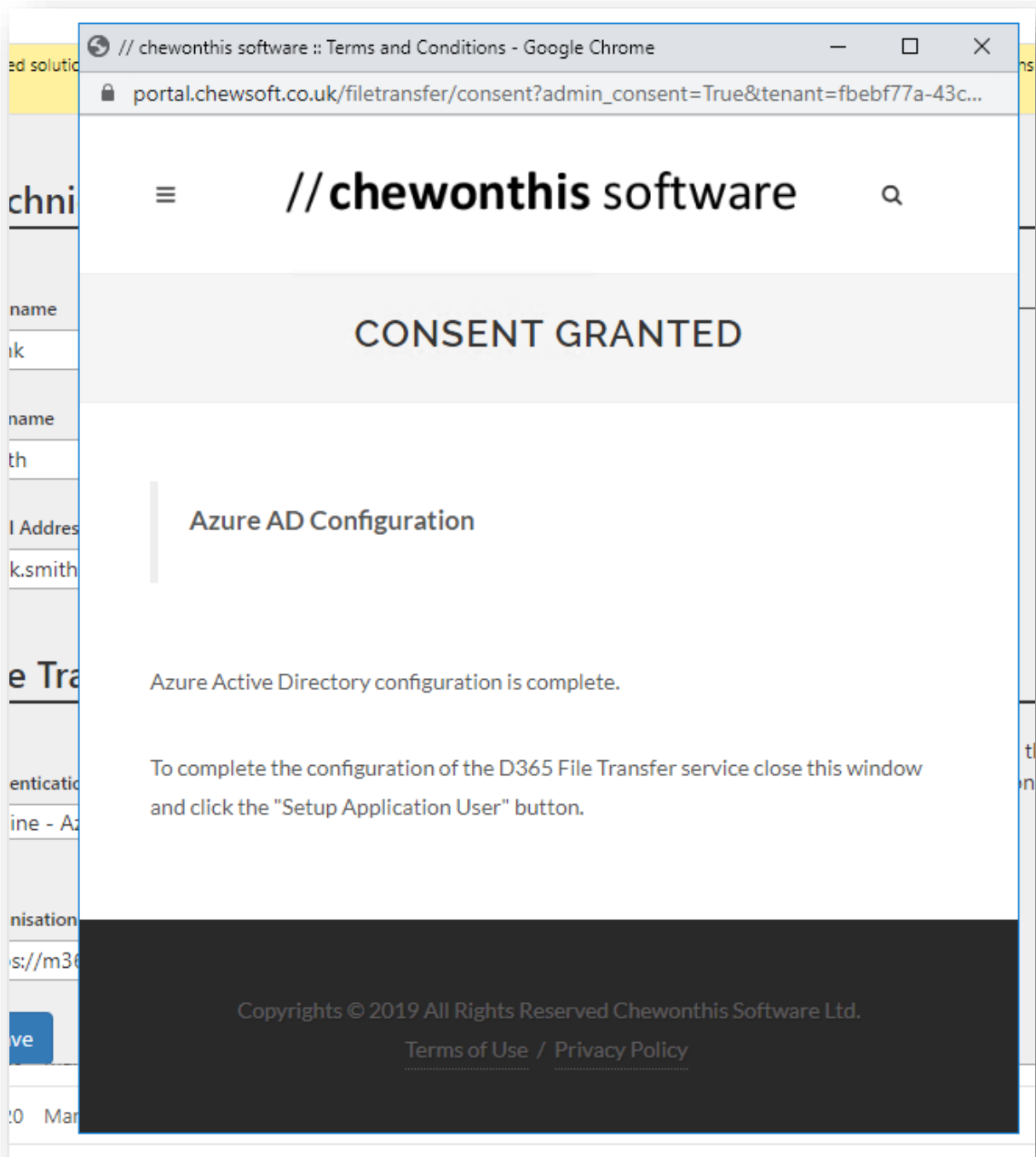
11. Close this window by clicking the x in the top right corner.
12. On the File Transfer configuration page, now click the "Setup Application User" button.

CLICKING THIS BUTTON ASSIGNS THE FILE TRANSFER SERVICE ACCOUNT PERMISSIONS TO EXECUTE.

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 File Transfer service is now complete. Close the File Transfer solution 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.
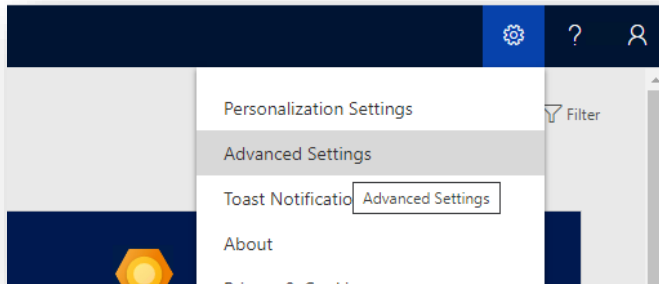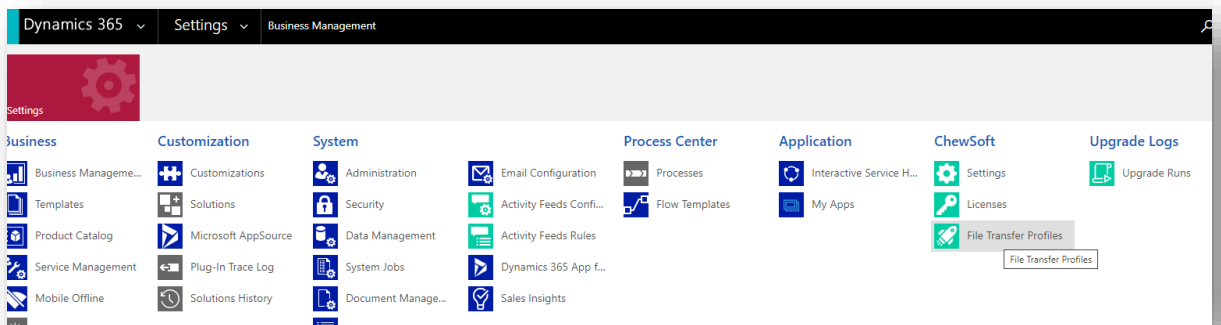
5. SETTING UP A FILE TRANSFER

5.1   CREATE FILE TRANSFER PROFILE

1. As a System Administrator or a File Transfer Administrator, navigate to Advanced Settings

2. Click "File Transfer Profiles" from the settings menu

3. Click "New" to create a new File Transfer Profile.
4. Enter the name of the profile. EG. My Azure Storage Account

5. Enter the Transfer Method required – you have the following options:
- Secure FTP
- HTTPS Post
- Azure Storage
- File Share
- FTP (Insecure)
- HTTP Post (Insecure)

The option you select determines the additional profile settings you will be required to provide. See section 5.2 for further information on the options available.

6. Enter the settings required for the Transfer Method selected. For example, if Azure Storage is selected you must enter Azure Storage Connection String and the Azure Storage Container name.

7. Click Save

5.2   TRANSFER METHODS AND SETTINGS

5.2.1 SECURE FTP

Secure FTP or sFTP is a secure way of transferring files to an FTP server. A secure FTP profile requires you to enter the following settings:

Field	Description
FTP Server Address	The address of the FTP server. This should be entered as the server name with no preceding or trailing slashes. EG. myserver.com
FTP Server Folder	The folder on target FTP server the file should be transferred to. No proceeding or trailing slashes. EG. data
FTP Server Port	If a custom port is required enter it here.
FTP Username	The username required to connect to the FTP server.
FTP Password	The password required to connect to the FTP server.

5.2.2 HTTPS POST

The file is transferred using a secure HTTP Post.

Field	Description
URL	The URL of the server the file should be transferred to using a HTTP Post. EG. https://data.myserver.com/post
Username	The username required to connect to the HTTP server.
Password	The password required to connect to the HTTP server.

5.2.3 AZURE STORAGE

The file is transferred securely to an Azure Storage Account.

Field	Description
Azure Storage Connection String	The connection string for the Azure Storage account.
Azure Storage Container	Name of the storage container to use.

5.2.4 FILE SHARE

The file is transferred to windows file.

Field	Description
UNC Path	The path to the windows file share.
Username	The username required to connect to the file share.
Password	The password required to connect to the file share.

5.2.5 FTP (INSECURE)

This transfer method is insecure and is therefore NOT recommended.

See Secure FTP settings for further information.

5.2.6 HTTP POST (INSECURE)

This transfer method is insecure and is therefore NOT recommended.

See HTTPS Post settings for further information.

5.3 SETTING UP A FILE TRANSFER WORKFLOW

Once a File Transfer profile has been created, the simplest way of enabling users to transfer files is by using an on-demand workflow.

The File Transfer service includes custom workflow activities to help you create your own workflows.

However, if creating your own workflow "sounds a bit much" - don't worry, we've created one for you. To configure it with your profile you will need to:
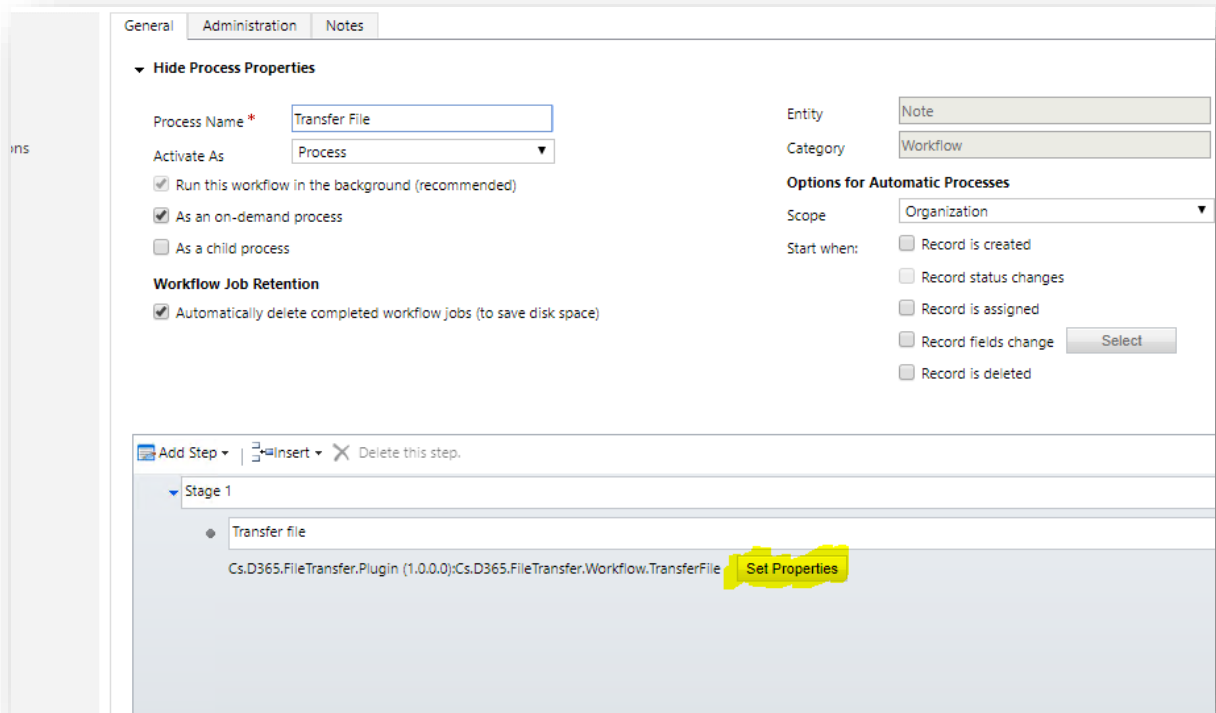
1. Create a File Transfer Profile as per section 5.1
2. Navigate to Settings > Advanced Settings
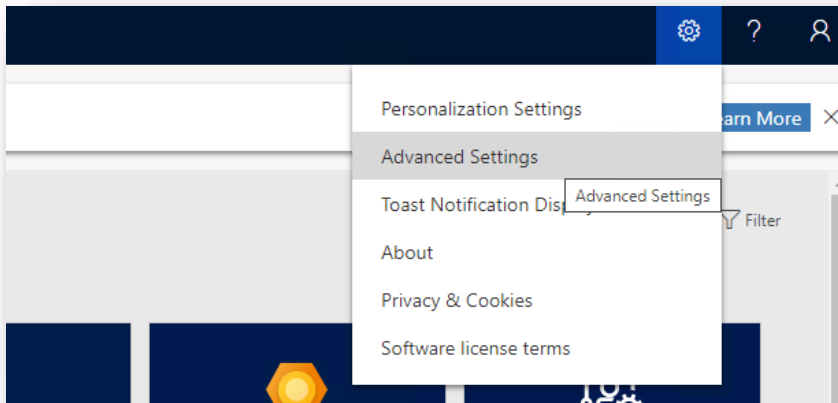
3. From the menu click Settings > Processes
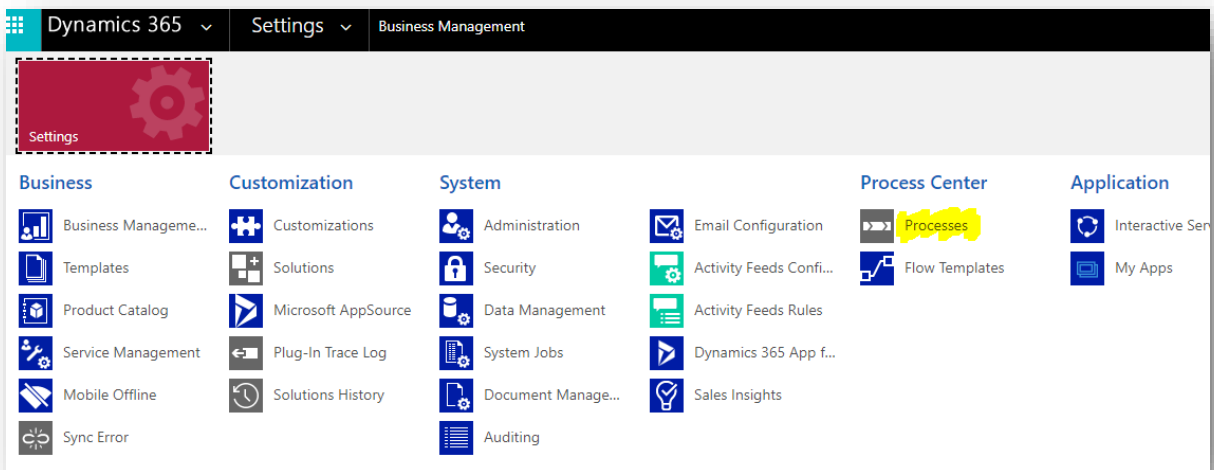
4. In the grid of results, click the "Transfer File" process.
5. The Transfer File process should be deactivated. If it is not click Deactivate.
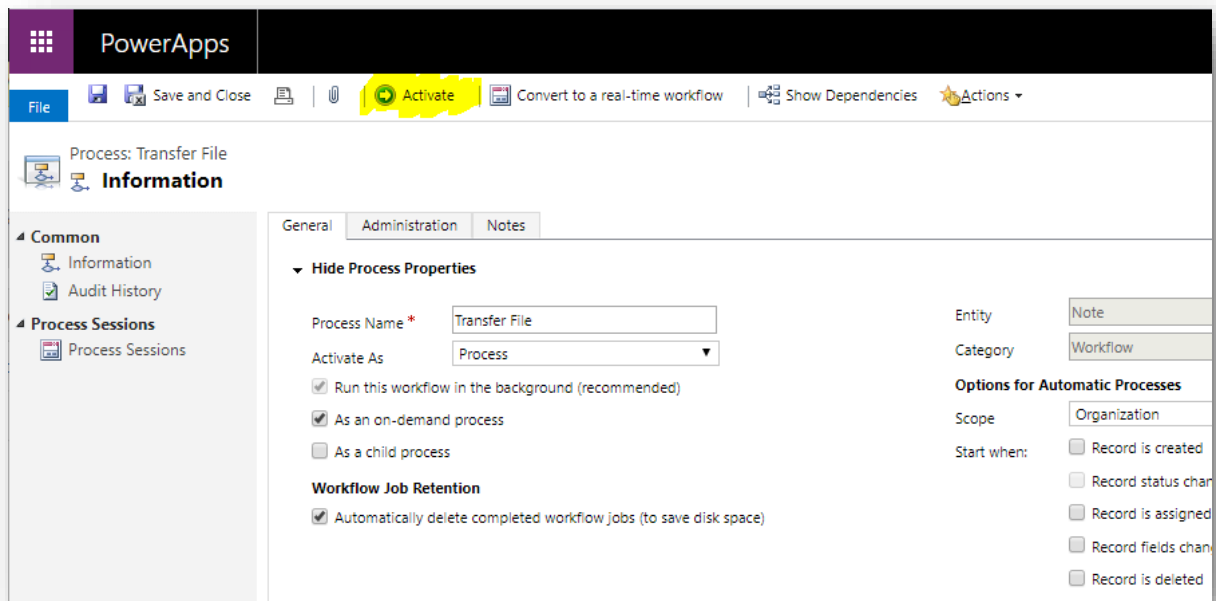6. Click the "Set Properties" button on the Transfer File process form.

7. In the settings window, click on the File Transfer Task search box and select the profile created in Step 1.
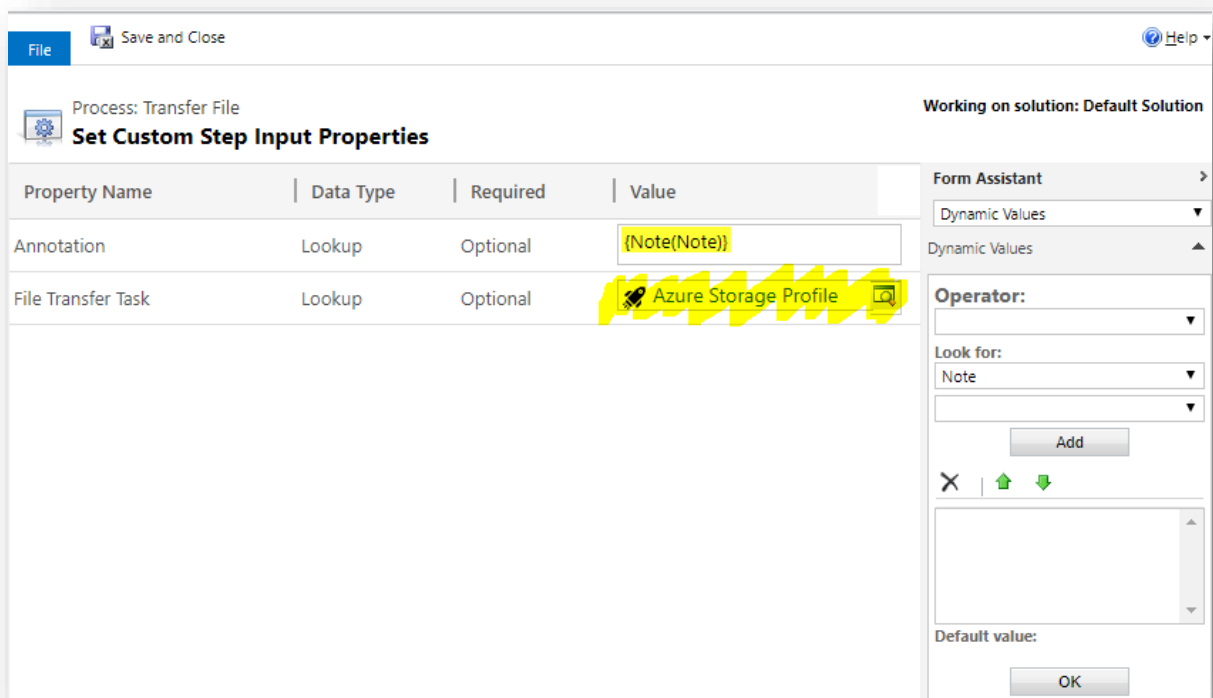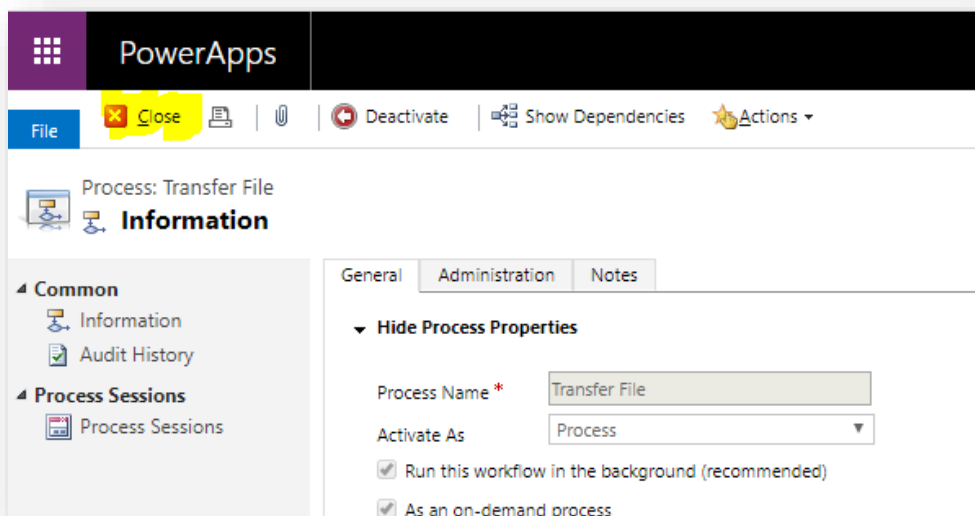

8. Click Save and Close
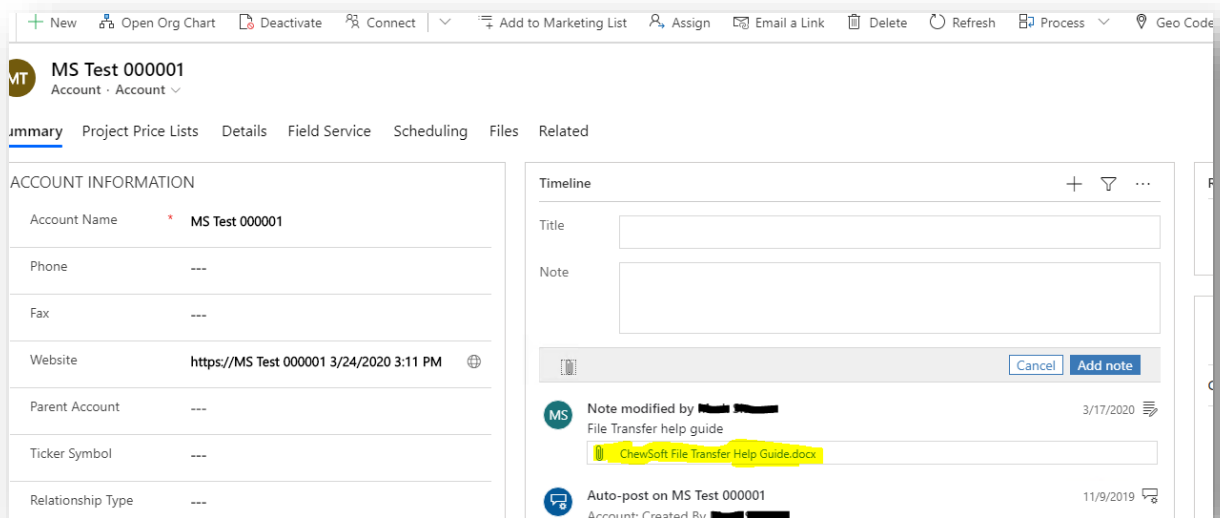
9. Click "Activate"
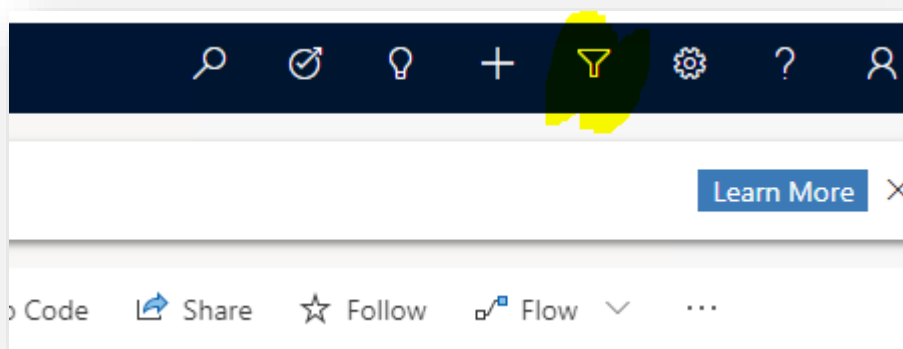

10. Click "Close"

5.4 TRANSFERRING A FILE

To test the file transfer profile you configured in the previous step do the following:

1. Open an existing account or create a new one.

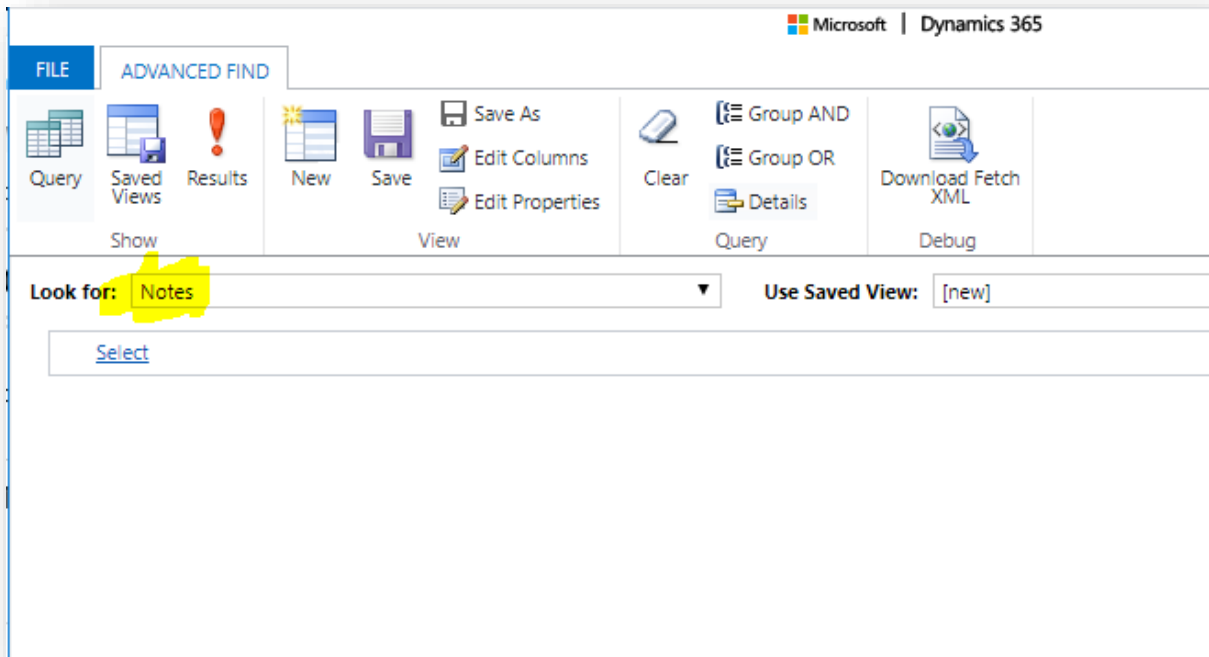2. Create a new note and attach a file to it.

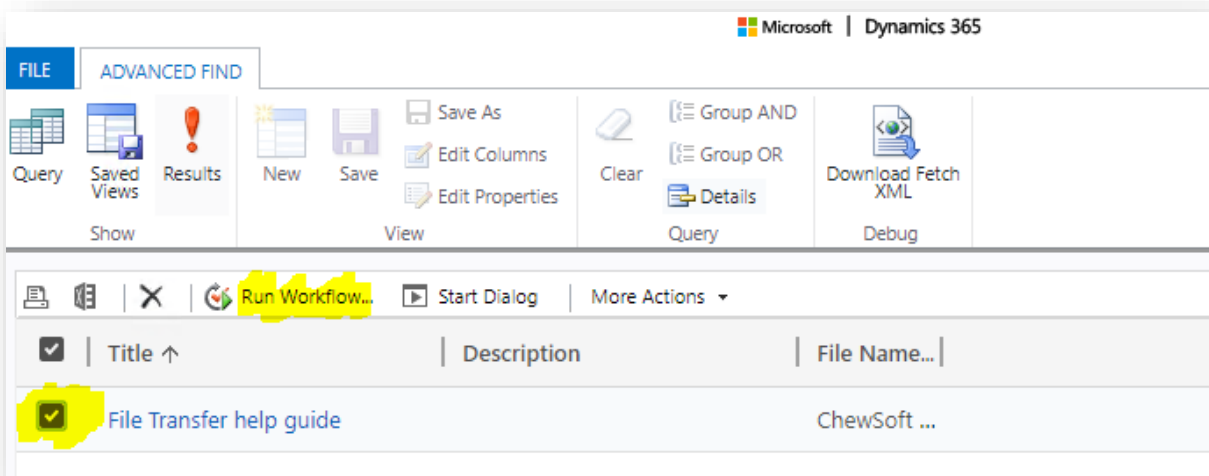3. Next Click Advanced Find from the menu

4. In the Advanced Find search change the entity to search to "Notes"
NB. If you have already created notes in your environment you may want to add search criteria here to find the note you created in the previous steps.

5. Click Results
6. Check the tickbox to select the Note the file is attached to and click "Run Workflow".

7. In the pop window, select the Transfer File workflow

8. Click Add and then OK.

5.5 REVIEWING EXECUTION HISTORY
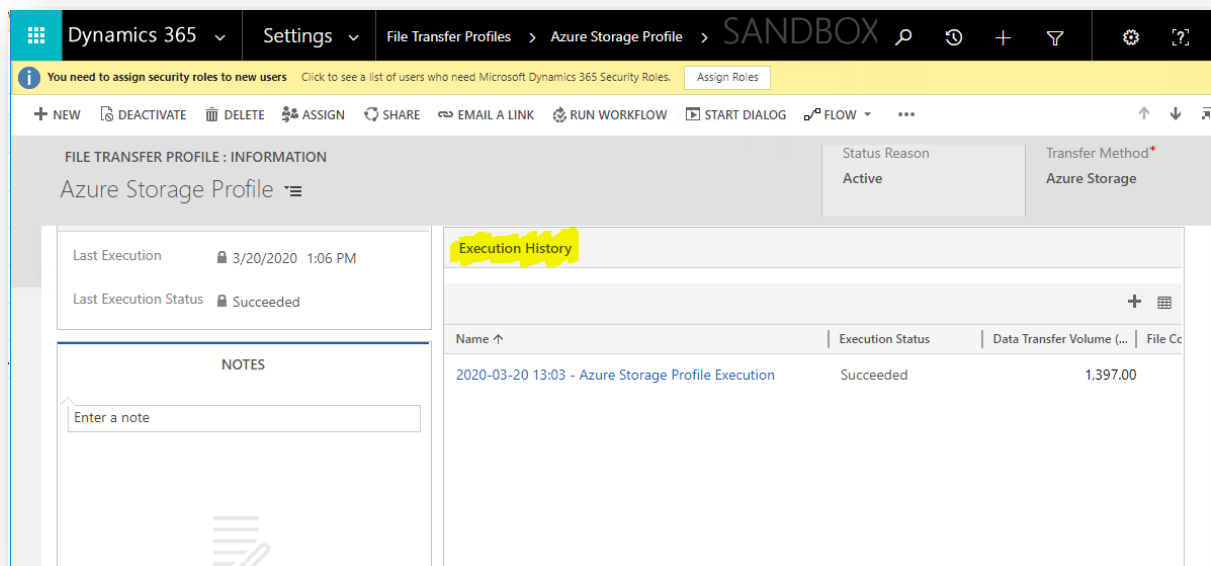
The execution history of a file transfer profile can be viewed on the File Transfer Profile form under "Execution History".
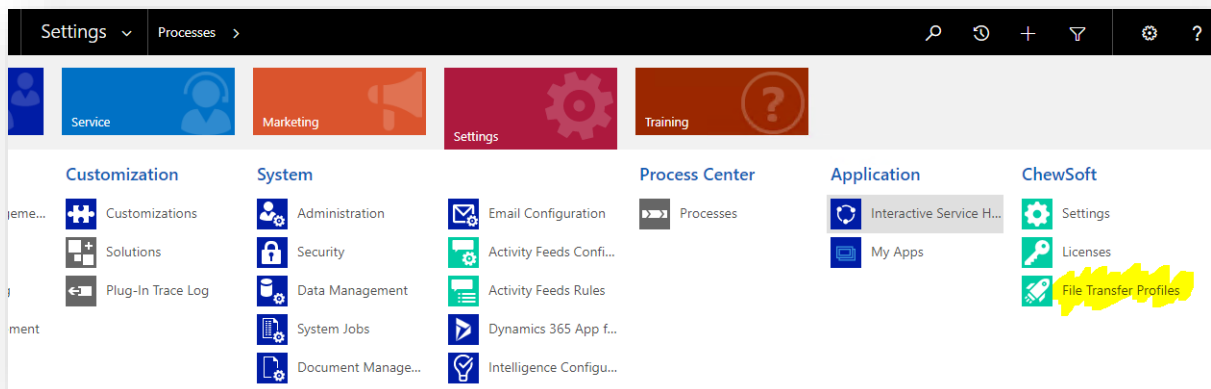
To review the status of the File Transfer triggered in the previous step:

1. Navigate to Settings > File Transfer Profiles

2. In the grid of results, click on your File Transfer Profile to open it.
3. On the File Transfer Profile form, scroll to the section called "Execution History". Double click the most recent entry to view the status.

26/02/2020 06:57:17 - Azure Storage Profile Execution

▲ General

Name *	26/02/2020 06:57:17 - Azure Storage Profile Execution
File Transfer Profile	Azure Storage Profile
File Count	---
Data Transfer Volume (KB)	---
Trigger Date	---
Execution Status	In Progress
Owner *	👤 Mark Sissens (admin)
Created On	🔒 2/26/2020 6:57 AM

Notes

Triggered by Agent at 26/02/2020 06:57:17.Transferring file conversionTrend.csv
W01 completed processing.
Transferring file conversionTrend.csv
Transferring file conversionTrend.csv
Transferred file conversionTrend.csv

Error Message   ---

Name ↑	Created On	

6. REQUESTING HELP

The Chewonthis Support team are available to support you should you encounter difficulties with the File Transfer Service.

You can contact us in the following ways:

6.1 RAISE A SUPPORT REQUEST

Please click the "Support Request" link to raise a ticket on the configuration page of the File Transfer service. One of our technical support team will contact you directly.

6.2 CONTACT THE TEAM

You can contact our support team directly via email: support@chewsoft.co.uk