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DocumentsCorePack:

-
Performance, Utilization and Service Logs
(what Service-admins should know)

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DCP Service: Document generation engine



Dynamics 365



PowerApps



PowerAutomate

Document Requests



DocumensCorePack Service

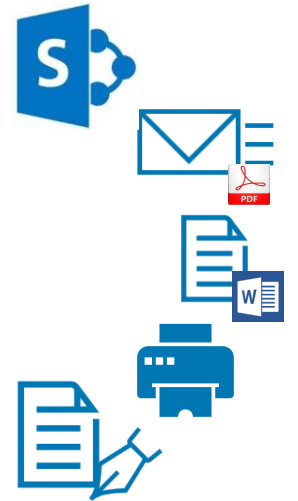


DataVerse



PowerAutomate

+



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Office 365
Outlook



Dropbox



SharePoint



DocumentsCorePack Service Configuration



Setup & Configuration

- Connection & Authentication
- Key Settings
- API Key for PowerAutomate & Canvas Apps
- Your License count details
- Template Management



Performance & Utilization

- Usage Report
- Performance
 - Document statistics
 - Template usage
- Load Balancing
 - How it works
 - When to use

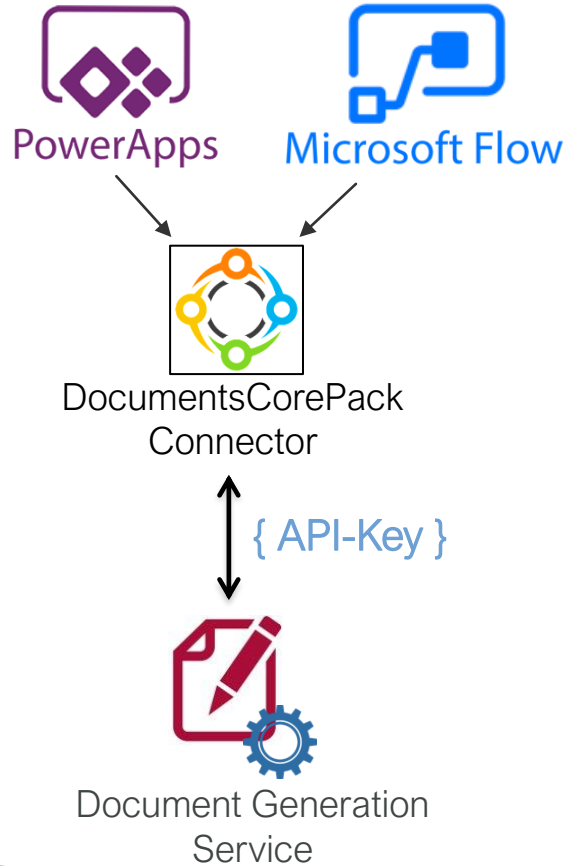


Logs

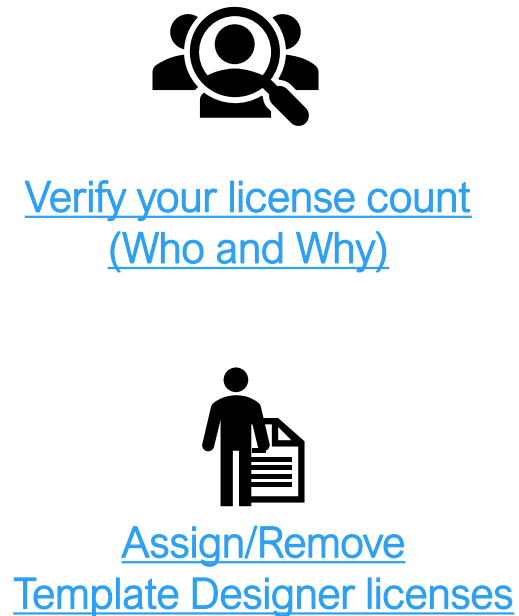
- Service Logs
 - Service status
 - Start / Stop
- Debugging
 - Document generation errors & general document issues (formatting)

Setup & configuration

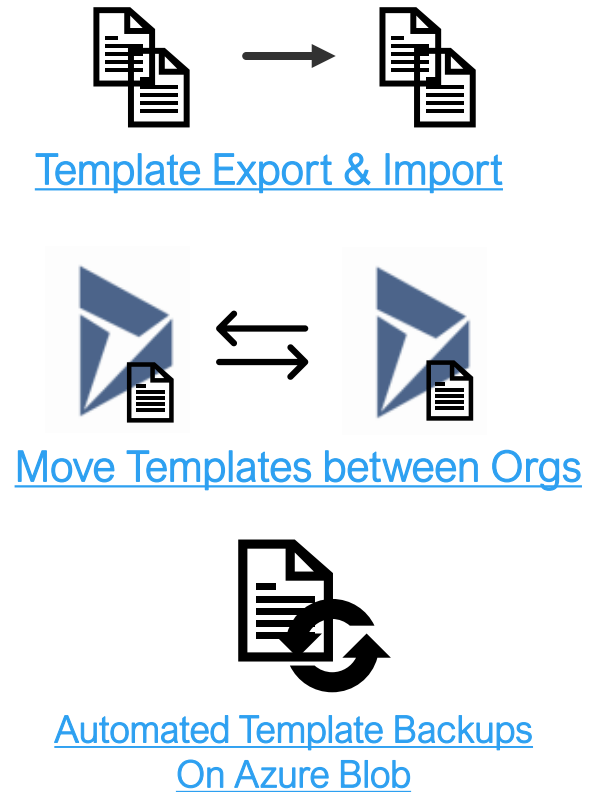
API Key



Licensing



Template Management



Performance and Utilization



Document Statistics

- Total duration
- Document creation duration
 - Possible issues if high (typically template)
 - *Large pictures*
 - *Unnecessary relationships/data*
 - *Subtemplates*
- Document save duration
 - *Large files (check template)*
 - *Bad connection (move service?)*
 - *SharePoint issues*
- Template utilization: group by template
 - *Identify unused templates*

Load Balancing (>Workloads)



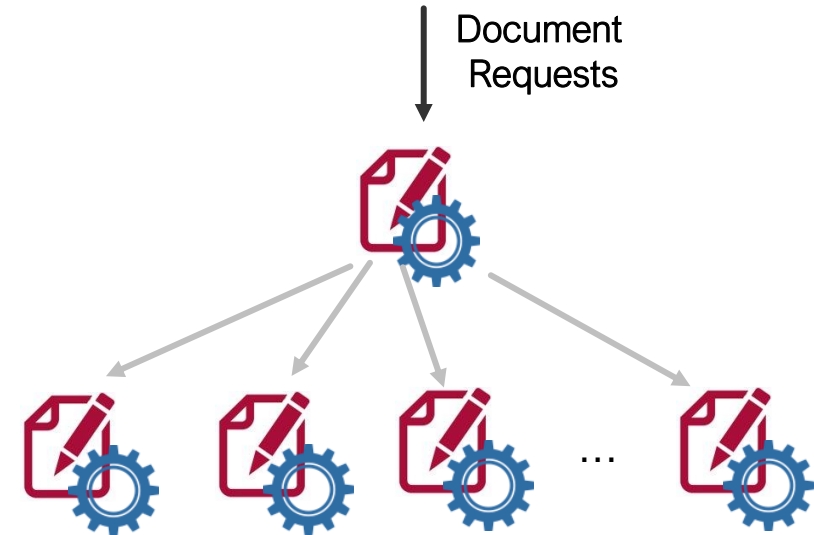
PowerApps



Dynamics 365



PowerAutomate



How it works?

Scalability:

- 3 Mio documents / year: 5 services
- 800k documents / year: 20 services (>simultaneity)

Demo:

- Step-by-Step walkthrough
 - Service Setup
 - Configuration Options
 - Service Logs, Document Statistics

Roadmap:

- Reporting
 - Utilization charts
 - Automated (monthly) reports

Thank You and stay safe!

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- Don't forget we have an awesome Knowledge Base at <https://support.mscrm-addons.com/>, you'll find it to be a helpful resource!

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