NGN – Phase 1 Deliverable Readme

# Overview

The deliverable contains the CRM solution, all code and web resources and the documentation zipped together. To start, extract the zipped file.

# Solution

The solution extract was taken from a Dynamics CRM online environment running version 9.1. The solution is unmanaged.

## To Install:

1. Find the solution extract “Sprint 1” in the Solution folder
2. Install the solution into a clean Dynamics CRM online environment running 9.1 or higher
3. Using the plugin registration tool, set the plugins to run as a system administrator account

# Data Loading

The NGN team will be able to provide the data to be loaded. Load the data via excel in the specified order below.

1. Region
2. School District
3. Vendor
4. Contact
5. School District Contact
6. Site
7. Site Service
8. School Profile
9. Service
10. Service Price
11. Case Category
12. Case Subcategory
13. Cases (Historical, this is optional)
14. Order (Historical, this is optional)
15. Site Service History (This is optional)
16. Financial Category
17. Service Model

# Documentation

System documentation can be found in the Documentation folder as well as in Confluence.

# Source Code

Source code can be found in the Source Code folder. This code comprises of Custom Workflow Activities, Plugins, JavaScript Web Resources and Images.

# Security Roles

Setup the Service Delivery managers (Jason, Clinton, Trevor) with the security role, “NGN – Service Manager”.

Setup the expense authority (Gabriel) with the security role, “NGN – Expense Authority”.

For detailed information about the security roles, consult the documentation.