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Self-Driving Services

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1 Introduction

The objective of the Self-Driven Services (SDS) solution is to automate and schedule High Volume Transactions, based on Business Rules that you can configure yourself (based on the standard Unit4 PSA Suite business layer).

You can configure an SDS configuration by Legal Entity.

We will provide the following Self-Driving Services:

1. Auto PM Approval and Auto Admin Approval.
2. Auto Create Invoices and Approve.
3. Auto create Journal Entries Hours & Expenses.
4. Auto create Revenue Recognition Journal Entries.

2 Requirements

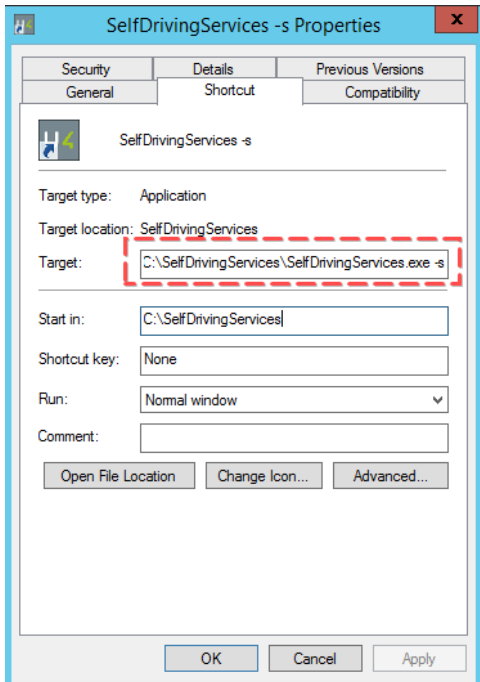
The Self-Driving Services solution of the Unit4 PSA Suite is developed to be run on a separate server and cannot be installed on native Dynamics 365. The separate server can be based on premises, on Microsoft Azure, or any other hosted server in the cloud or on-premises server or a client machine.

The SDS requires .Net Framework 4.7.1 to be installed.

3 Self-Driven Services Installation/Configuration

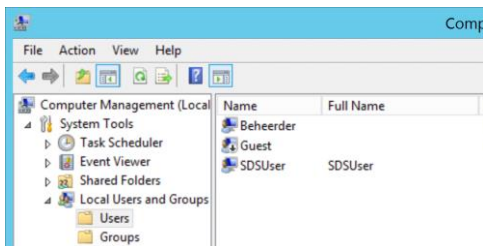
Copy the files of the SDS to a location on the server or local machine it will run on.

Create a shortcut to the SelfDrivingServices.exe file. Open the properties of the shortcut file and add '-s' to the end of the Target field. Using this shortcut now will open the configuration form of SDS to enter the connection settings to the CRM organization.




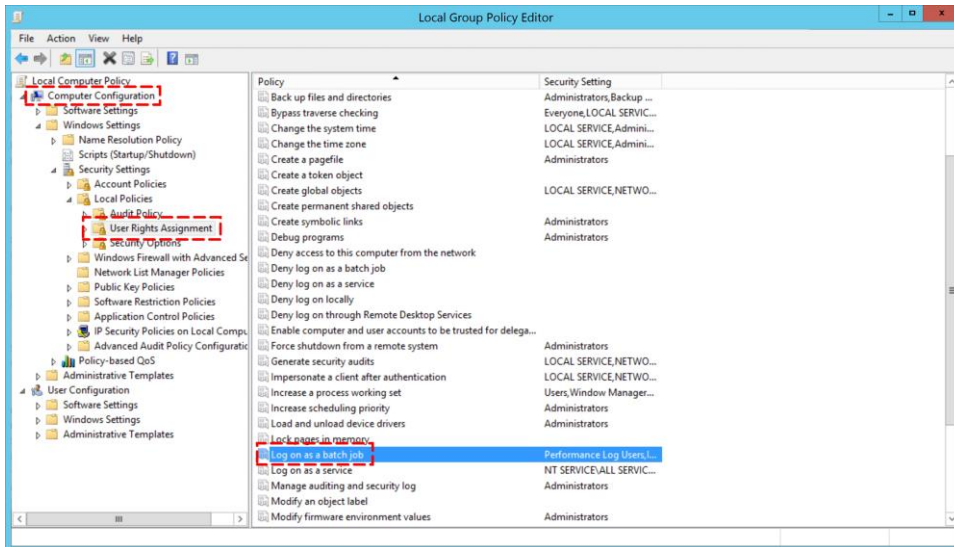
Service Account

Best practice is to run the task using a service account. Create the service account through the User and Computers console of your Active directory or by using the Computer Management console on the local server SDS will run on.

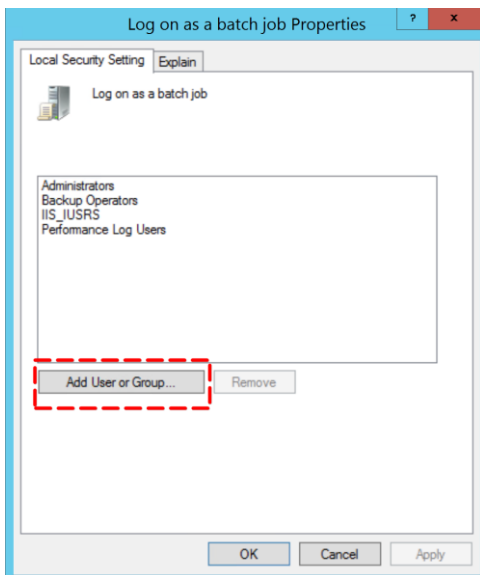


After the account is created, it must get the rights to "Logon as a batch job". This can be done by using a GPO from the DC or by a local group policy.

To use the local group policy click on  and type gpedit.msc to open the "Local group policy editor". Search for the option "Logon as a batch job". This option can be found at "Computer Configuration – Windows Settings – Security Settings – Local Policies – User Rights Assignment".



Double click on “Log on as a batch job” and add the service account that is created.



Click OK and close the Group Policy Edit console. The settings will automatically be saved.

Next give the service account full control rights on the Self Driving Services folder to be able to create the log files.

CRM

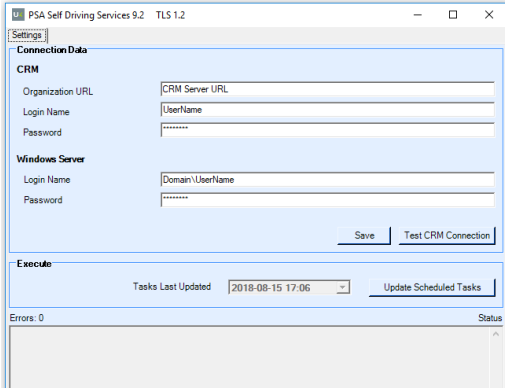
Organization URL: This is the URL of your CRM organization.

Login Name: Fill in the name of a CRM user with sufficient privileges.

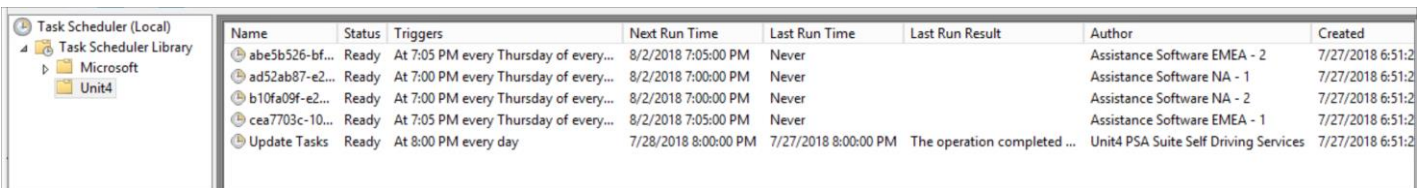
Windows Server

Login Name: Fill in the name of the Windows service account that is created to run the job.

After above information is entered, click “Save” to save these configuration settings and click on “Test CRM Connection” to check if the connection can be made.



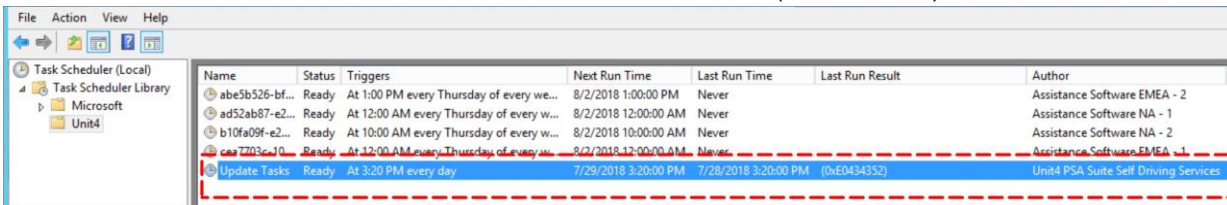
By Clicking on “Update Scheduled Tasks” the tool will first create a task with the name “Update Tasks” that will be scheduled to run every day at 8 PM. Directly afterwards the task will check the Self Driving Services settings within PSA Suite. According to these settings, other scheduled tasks will be created for every type of defined task and per Legal entity.



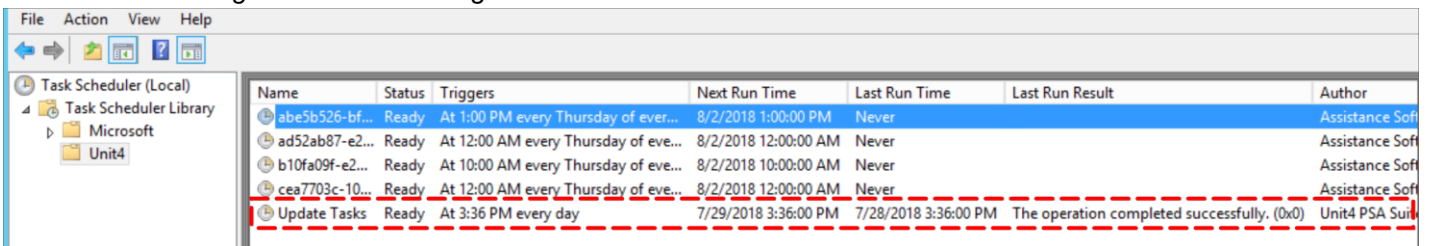
After the tasks ran, a log file will be created/updated within the logfiles folder of the Self Driving Services. After the installation and configuration are finished please check the logfiles if there are any issues. It is also recommended to check the log files after the first time the tasks should have run.

4 Known Issues

- Because of a time out, the tool is not always able to create a task after the button “Update Scheduled Tasks” is clicked.
- Click the option “Update Scheduled Tasks” again to try to created them a second time.
- The Task did not run.
- Check if the service account has the rights “Logon as a batch job”.
- The task did run but the “Last Run Result” shows the code (0xE0434352)



- The system account has no access to the “logfiles” folder within the Self Driving Services folder. Give the user full access to the Self Driving Services folder.
- The task did run and had the “Last Run Result” show the code “The operation completed successfully (0x0)” but the logfile of Self Driving Services shows “The application terminated with an error. Access to the path ‘C:\SelfDrivingServices\SelfDrivingServices.xml’ is denied”.



- The system account has access to the logfile folder but has no access to the folder of Self Driving Services itself. Give the user full access to the Self Driving Services folder.