Shrinky

How To Use Shrinky

1. Go to the Microsoft Dynamics environment you wish to install the Shrinky app. Click on Advanced Settings, go to Solutions and click on Import.
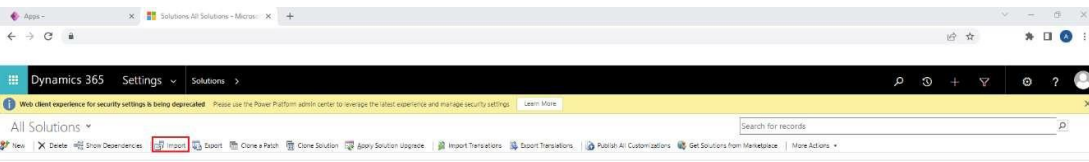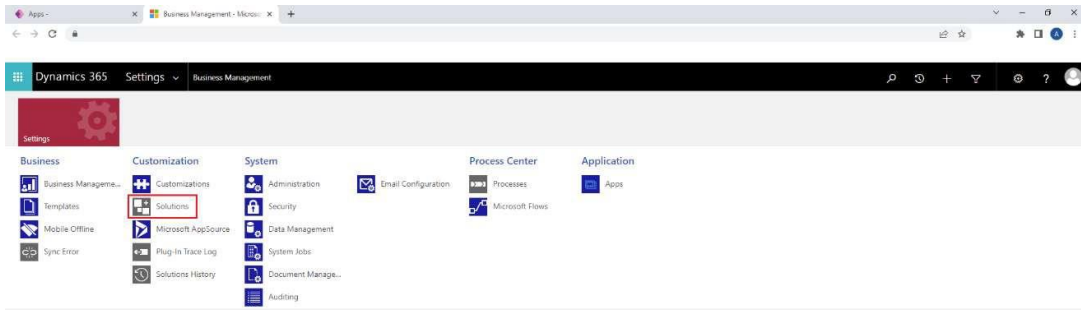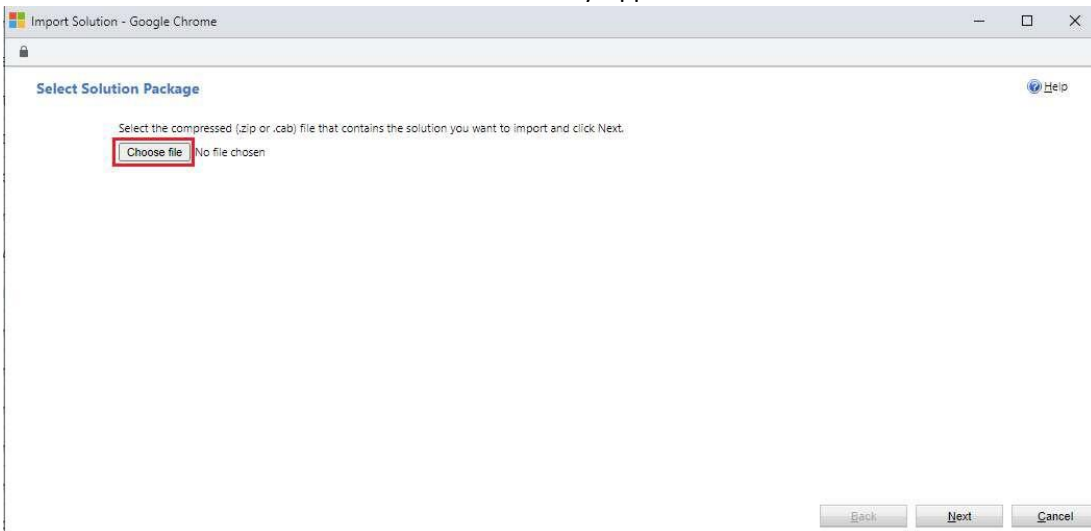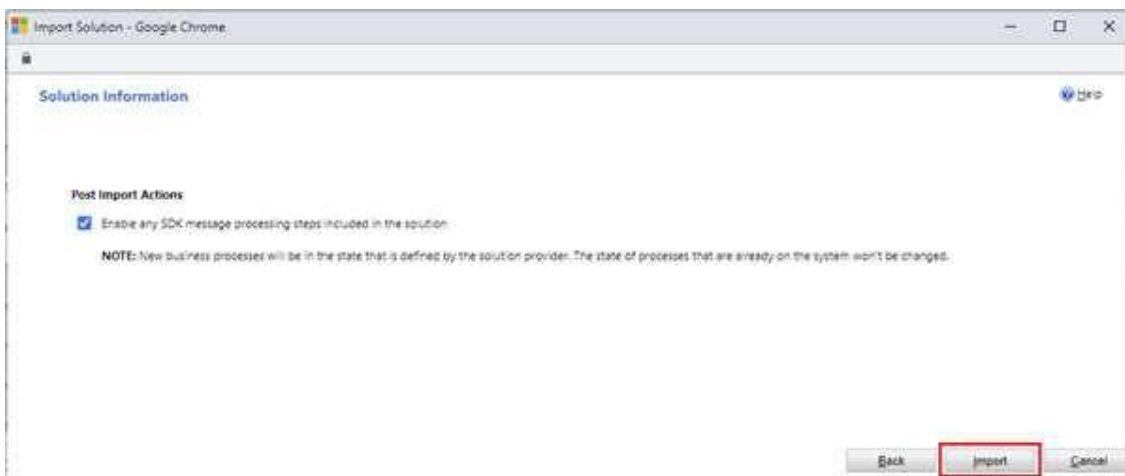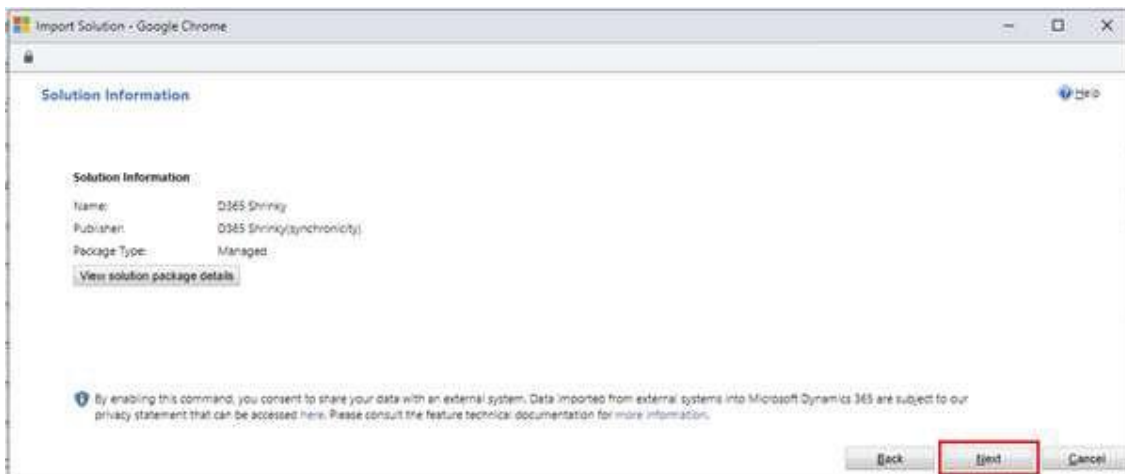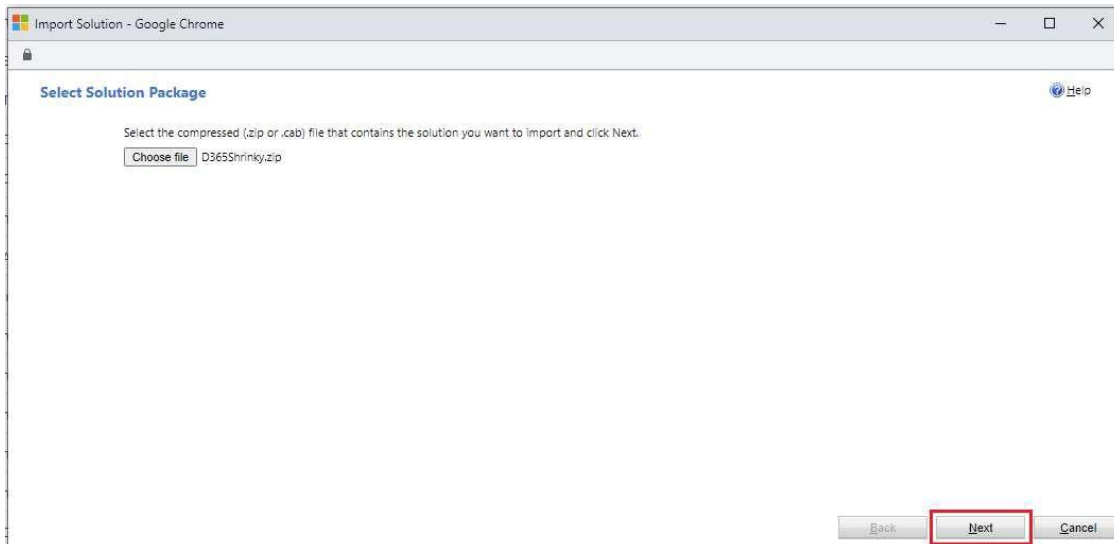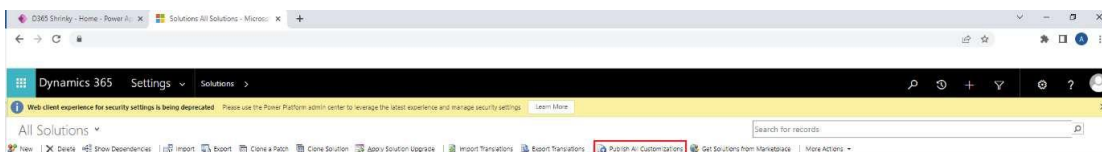

2. Click on Choose file and select the D365Shrinky zipped folder.
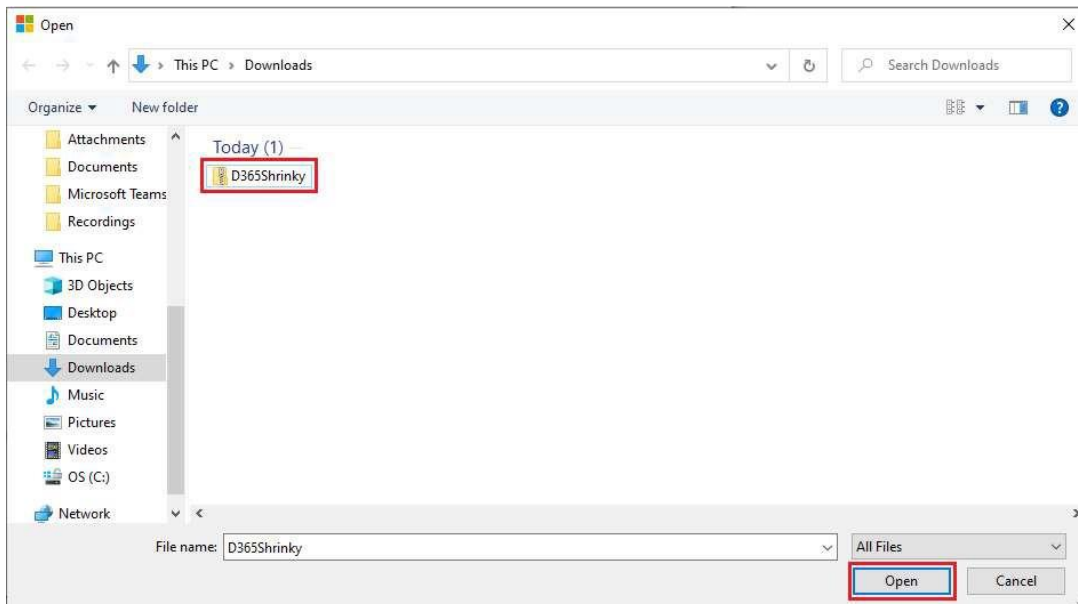
3. Click on Next and follow the import wizard.

4. Once the solution has imported, click on Publish All Customizations.

5. Return to the Dynamics environment and go to Apps. Select D365 Shrinky.
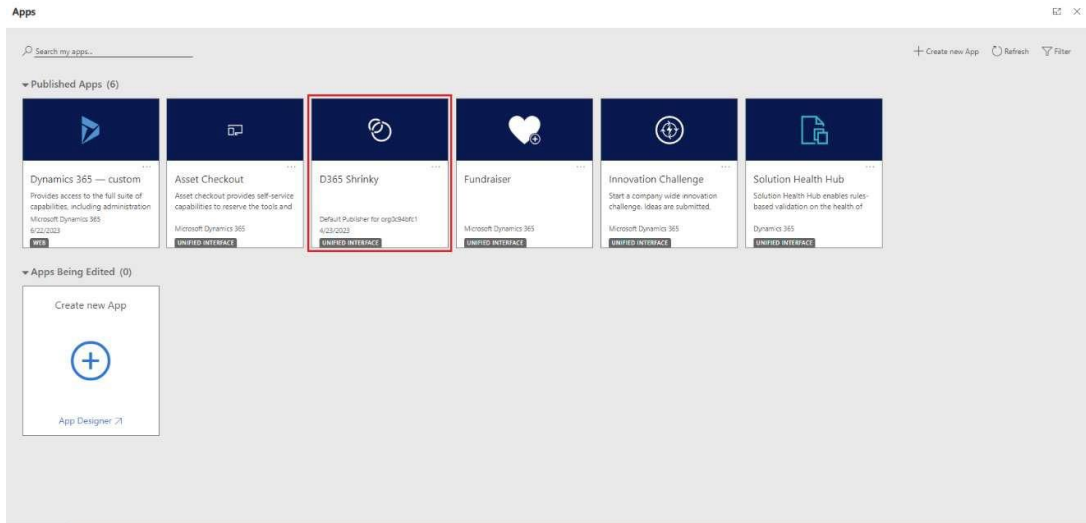
6. Once you select the app, click Calculate Space Saving.
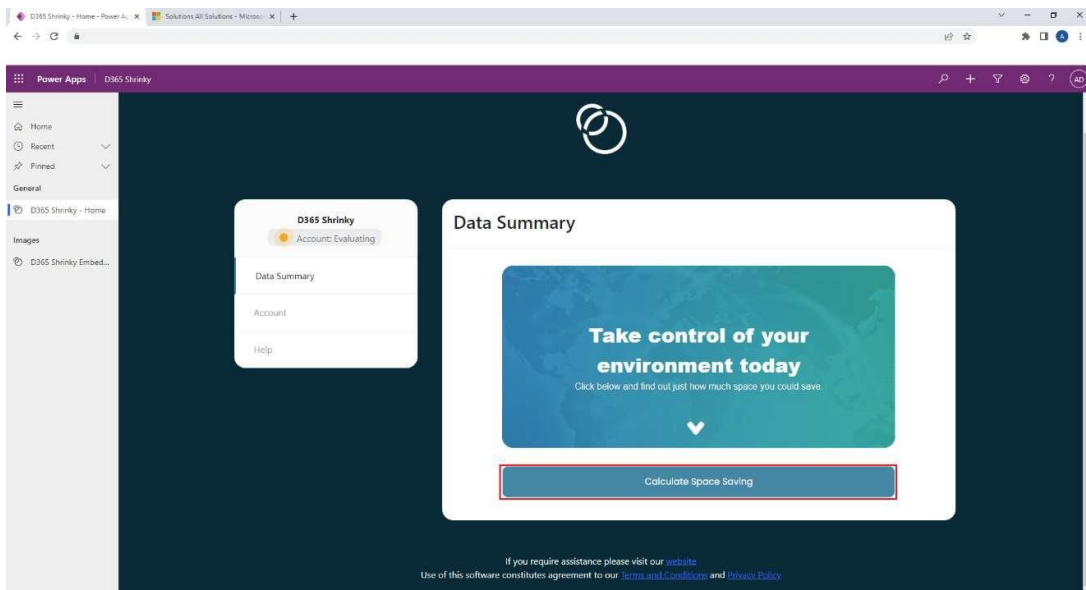
7. This will start assessing how much space could be reduced by using Shrinky. Once the summary becomes available and you wish to reduce the space being used by the activity pointer table, click on Subscribe to D365 Shrinky and follow the payment instructions.

8. One you have successfully subscribed to D365 Shrinky, you will notice a new tab called "Controller" will appear on the left-hand side menu. This is where you will control the scanner and the processor functionality going forward.
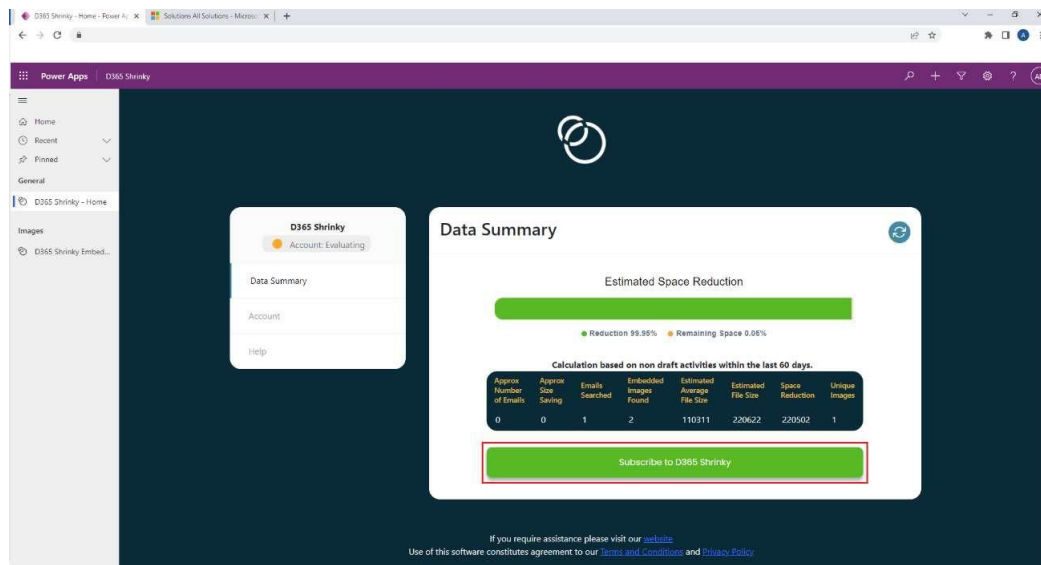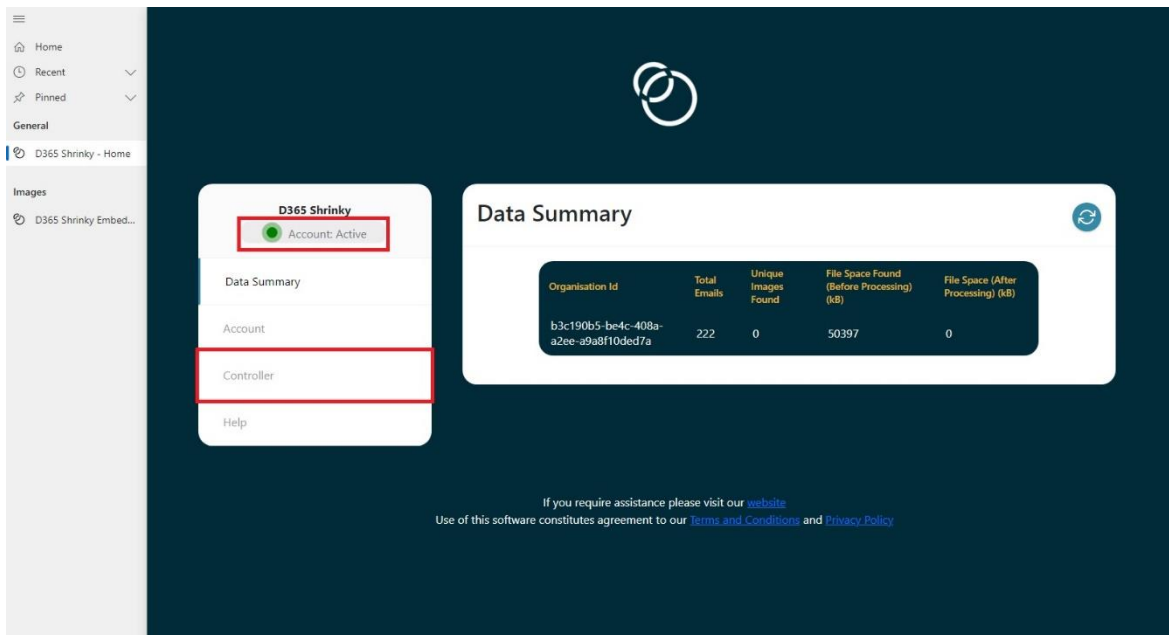

9. Since this will be the first time subscribing you will be required to input what's known as "Application User" credentials before being able to use Shrinky. The page to enter these details will automatically appear when you click on the Controller tab for the first time. This can be seen below. (A guide for setting up an Application User can be seen at the following link: https://d365-shrinky.com/how-to-use-shrinky/)
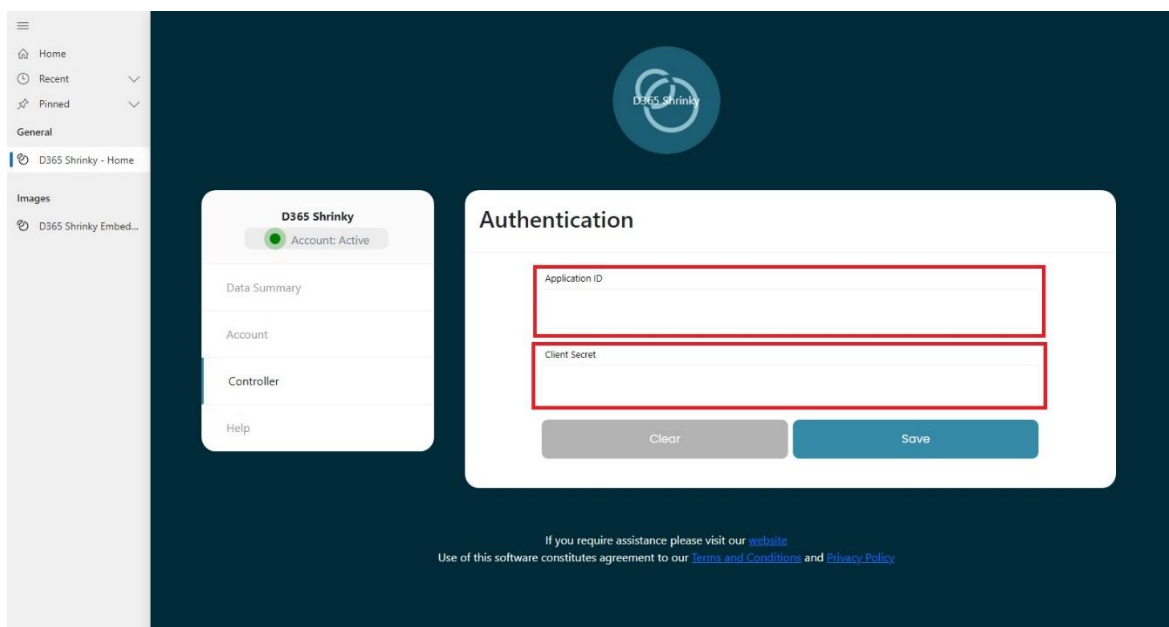
10. Once you have created your Application User and entered the Application ID and Client Secret data you can now click on the "Save" button provided and this will securely encrypt this information to allow Shrinky to interact with your environment. You will now notice that the screen has changed, and you can only see the Application ID. In addition, a new button named "Validate" will appear, please press this button and if your Application User is setup correctly after following the guide mentioned above you will see a message presented on the screen stating, "Authentication Successful".

IMPORTANT

You must assign the following Security Role (D365 Shrinky - Application User Permissions) and only this role to the Application User you just created. No other roles should be assigned to this user, doing so will be at your own risk.

11. One you have verified that your Application User is successfully setup and connected, you can now either click the Controller tab once more or click the back button found at the top right of the Authentication window. Upon doing either of these actions you will be presented with the Controller functionality to allow you to start and stop both the Scanner and Processor as seen below. Both the Scanner and the Processor can be started at the same time or if you wish they can be started individually. The Scanner will collect data from your system and check for image data and then create an "Embedded Image" record which can be found on the left-hand navigation under the Images header. Once the scanner has created these records you are then able to mark them for processing and then start the Processor in the Controller.
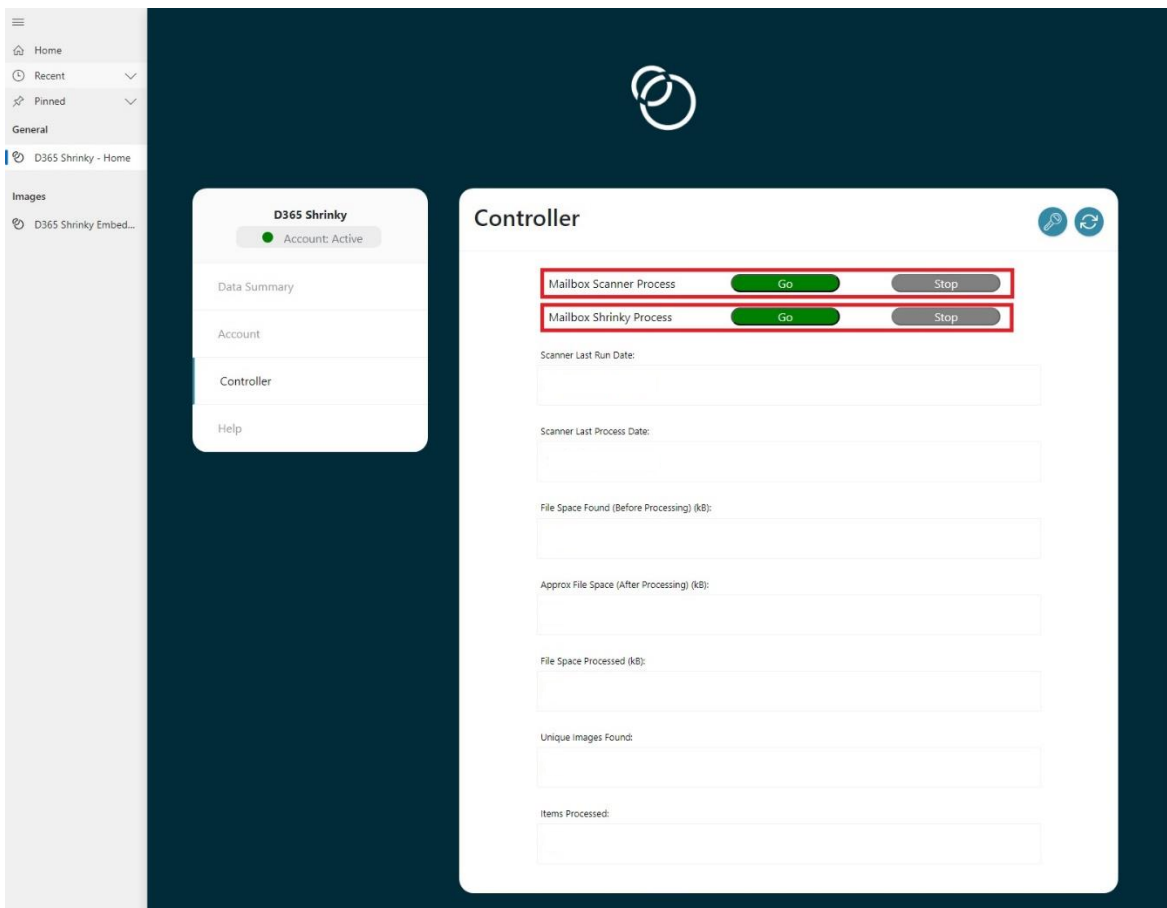
To expand on point number 11, the location in which you need find the Embedded Images found as part of the Scanner activity is located by using the navigation outlined below marked with the red square on the left of this image. In addition, you can see by the red box on the right that this is the process flag mentioned above. To mark this as "Yes" for the Processor logic to run on these records you will need to open one of them and at the bottom of the General tab click on the slider and save the record.

Once you have completed these steps you can now return to the Shrinky Controller tab and click on the "Go" button to start the Processor functionality.