



ActivityTools for MS CRM 2011

Version 5.0, August 2013

Installation Guide

(How to install/uninstall ActivityTools for MS CRM 2011)

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1 ActivityTools Installer

This is the main window for the installation. Click "Next" to continue the installation.



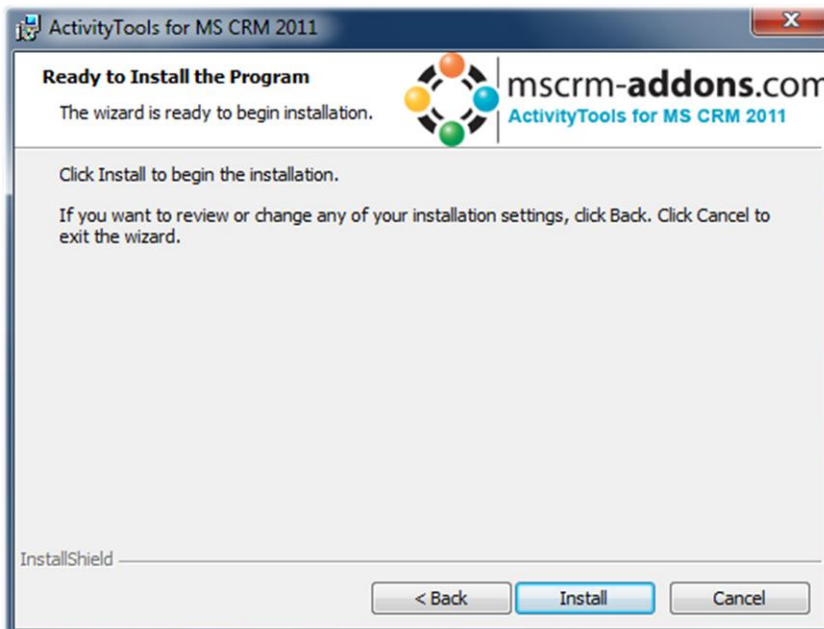
2 EULA (End User License Agreement)

Read the license agreement carefully and accept it if you agree to the terms and if you want to continue with the installation. If you do not accept the license agreement, you cannot continue with the installation. There is also a "Print"-button if you want to print the license agreement.



3 Installation

After accepting the EULA click on "Install" to continue with the installation.



4 Security Roles

General security roles for all products:

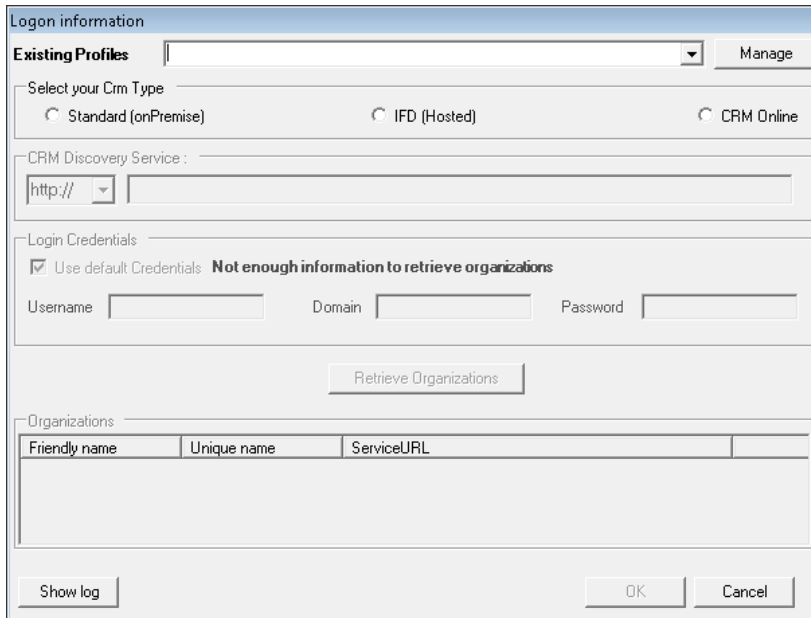
The following security role is required by all our products:

- MSCRM-Addons General Security Role

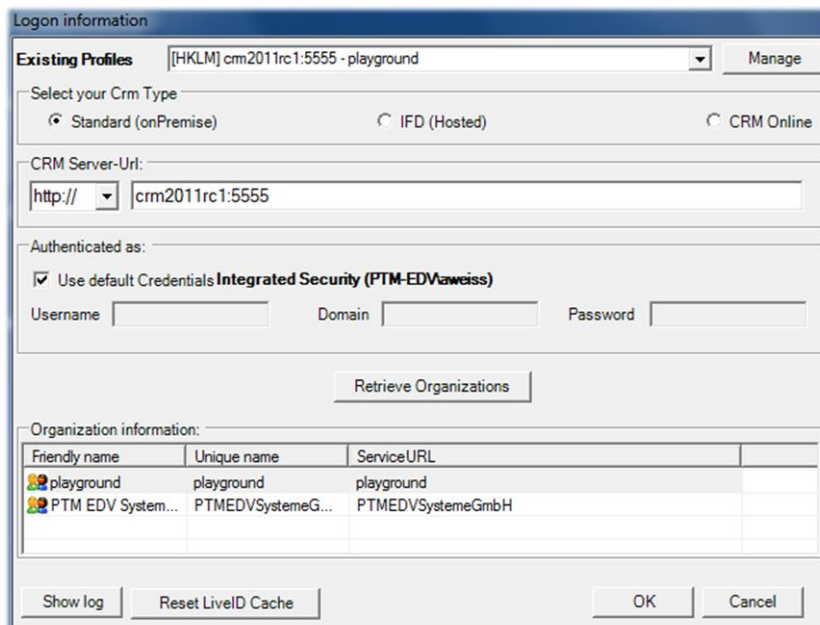
This security role contains the basic requirements for using the product itself and for being able to perform the license check.

5 Logon Information

ActivityTools requires a connection to CRM. To configure your CRM Server, select an existing profile or create a new profile:



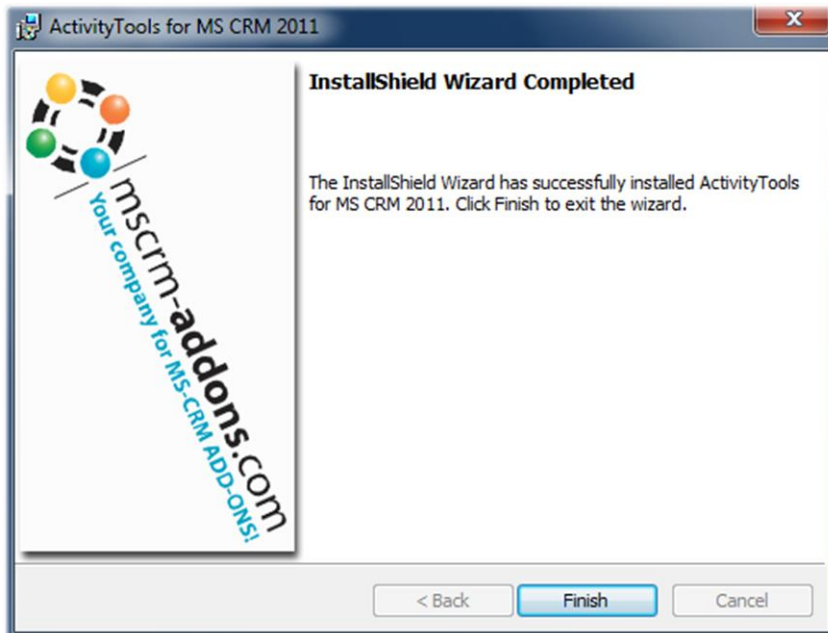
Choose the server path and add your login credentials by filling in the field's username, password and domain or choose the default credentials to connect as the currently active user. As soon as the Organizations are retrieved, select the desired organization and press the [OK]-button.



Friendly name	Unique name	ServiceURL
playground	playground	playground
PTM EDV System...	PTMEDVSystemeG...	PTMEDVSystemeGmbH

6 Complete the installation

The installation was successful. Click on "Finish" to finish the installation and to exit the installer.



7 How to install ActivityTools in an in an IFD/Claims-Based-Environment

This chapter will walk you through the required steps to install ActivityTools in an IFD/Claims-Based-Environment.

You need to have the following downloads present to successfully setup the Addon:

1. IFD-Tool -> [Download Link](#), you need to have a login on our web site
2. For installing ActivityTools you need at least version 5.13 from our [Download Section](#)

Before you start installing, MS CRM is required to be working correctly in IFD/Claims-Mode, including your ADFS, which should be installed correctly and configured to work with MS CRM.

More details on how to configure MSCRM for IFD/Claims can be found in the Microsoft Guide "Configuring Claims-based Authentication for Microsoft Dynamics CRM 2011" [Download](#).

The following system configuration is the basis for our guide. Your setup will differ in these URLs, make sure you are replacing the URLs with your own URLs when following the guide. ActivityTools has to be configured with a http AND a https port.

Internal Url used to access Microsoft Dynamics CRM:

https://internalcrm.rc1ifd.ptm-edv.at

External Url used to access Microsoft Dynamics CRM:

https://[orgname].rc1ifd.ptm-edv.at

AD FS Server:

https://win2008domain.ptm-edv.at

The Addon itself also requires a dns name:

https://activitytoolsserver.rc1ifd.ptm-edv.at

Basic installation/configuration of our Add-On:

1. Install the Addon on the CRM Server.
2. You will be asked for the Logon Information. Fill in the internal IFD name of your CRM. In our case, it is internalcrm.rc1ifd.ptm-edv.at. Select the organization on which you want to install the Addon and click on OK.

Login information

Welcome to your CRM Connection setup.

Please specify your connection details to connect to CRM. If you do not know the connection details, please contact your system administrator

CRM Connection | Proxy Settings | Log

Existing Profiles [Dropdown] [Manage]

Select your Crm Type

Standard (onPremise) IFD (Hosted) CRM Online

CRM Server-Url:

[https://] [internalcrm.rc1.ifd.ptm-edv.at]

Authenticated as:

Use default Credentials **ptm-edv.at\administrator**

Username [administrator] Domain [ptm-edv.at] Password [*****]

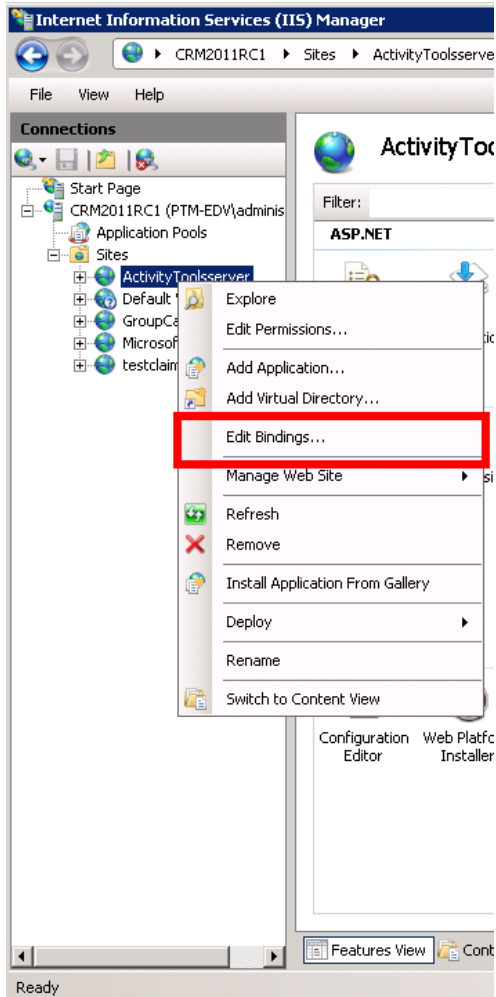
[Retrieve all Organizations]

Organization information:

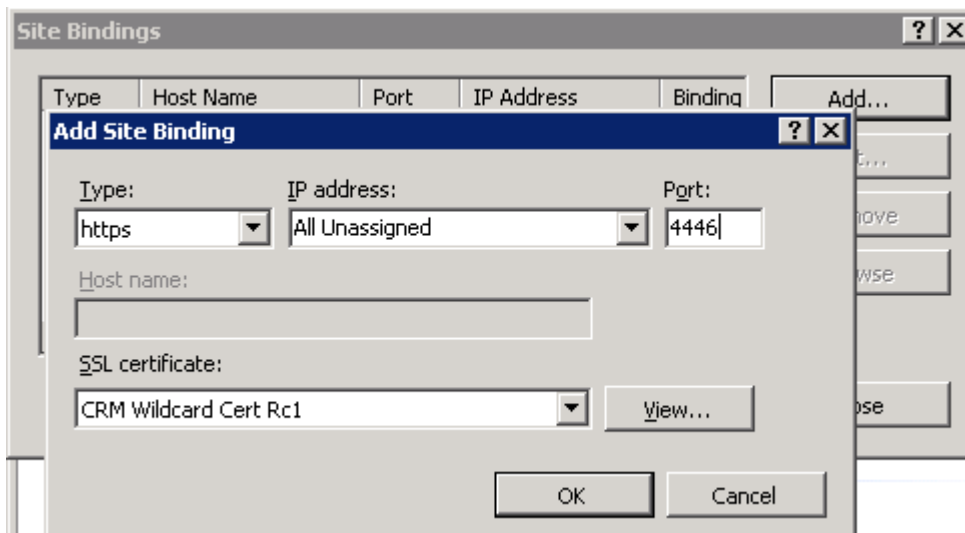
Friendly name	Unique name	ServiceURL	
playground	playground	playground	
r2d2	r2d2	r2d2	
ctenek	ctenek	ctenek	

[Reset LiveID Cache] [OK] [Cancel]

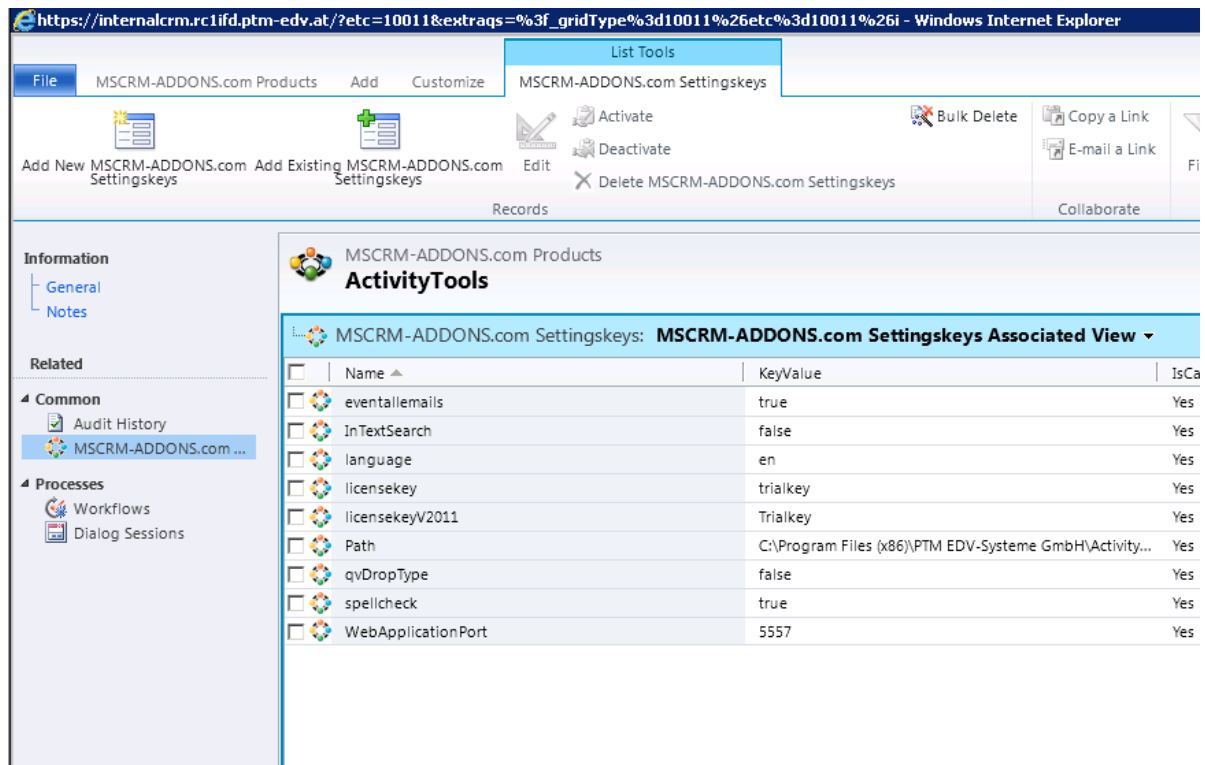
- After the installation is finished, you have to open the IIS (inetmgr.exe) and to go to Sites-> the Addon WebSite. Right click the ActivityToolsserver - WebSite and select "Edit Bindings..."



On the Bindings click on "Add.." and select in the "Add Site Binding" the type "https". You also have to specify the Port in our example we use 4446



4. Reselect the Addon website and double click on the "Authentication" item in the right side details pane. Verify that the options "Anonymous" and "ASP.Net Impersonation" settings are enabled.
5. The Addon url needs to be added to your DNS Server. Your DNS-Servers have to resolve the activitytoolsserver.[your-domain] names correctly. This means that they should resolve it with the same ip address as your CRM Server has. IF you are also using an external DNS, make sure that both external and internal DNS are able to resolve the URL.
6. Extract the IFD-Tool (zip-File) that you downloaded before and execute the IFDSetupWizard.exe. Follow the steps in the IFD Setup carefully.
7. Open your CRM in Internet Explorer and go to "Settings" -> "MSCRM-ADDONS.com Products" -> Open ActivityTools -> within the MSCRM-ADDONS.com Products form, select the MSCRM-ADDONS.com Settingskeys and search for the "WebApplicationPort" entry.



	Name	KeyValue	IsCa
<input type="checkbox"/>	eventallemails	true	Yes
<input type="checkbox"/>	InTextSearch	false	Yes
<input type="checkbox"/>	language	en	Yes
<input type="checkbox"/>	licensekey	trialkey	Yes
<input type="checkbox"/>	licensekeyV2011	Trialkey	Yes
<input type="checkbox"/>	Path	C:\Program Files (x86)\PTM EDV-Systeme GmbH\Activity...	Yes
<input type="checkbox"/>	qvDropType	false	Yes
<input type="checkbox"/>	spellcheck	true	Yes
<input type="checkbox"/>	WebApplicationPort	5557	Yes

8. Open the WebApplicationPort and replace the existing KeyValue with the following:
`[httpsPort]|[httpPort]|[claimsbased]|[addonname]|[debugging]`, e.g.:
`4446|5557|true|activitytoolsserver|false`

You have finished the configuration of the CRM part and now need to **configure the AD FS**.

NOTE: If you use AD FS you have to perform the IFD wizard again, if the https certificate and/or the TokenSignal certificate expire on AD FS.

1. Please logon your AD FS Server and start AD FS 2.0 Management.
2. On the Actions menu located in the right column, click Add Relying Party Trust.
3. In the Add Relying Party Trust Wizard, click Start.
4. On the Select Data Source page, click Import data about the relying party published online or on a local network, and then type the URL to locate the federationmetadata.xml file.

This federation metadata is created with the IFD-Tool on the CRM Server.

For example, <https://activitytoolsserver.rc1ifd.ptm-edv.at:4446/FederationMetadata/2007-06/FederationMetadata.xml>

Type this URL in your browser and verify that no certificate-related warnings appear.

5. Click Next.
6. On the Specify Display Name page, type in a display name, such as ActivityTools IFD, and click on Next.
7. On the Choose Issuance Authorization Rules page, leave the "Permit all users to access this relying party"-option selected, and then click Next.
8. On the Ready to Add Trust page, click Next, and then click Close.
9. If the Rules Editor appears, click Add Rule. Otherwise, in the Relying Party Trusts list, right-click the relying party object that you created, click Edit Claims Rules, and then click Add Rule. Important: Be sure the Issuance Transform Rules tab is selected.
10. In the Claim rule template list, select the Pass Through or Filter an Incoming Claim template, and then click Next.
11. Create the following rule:
 - Claim rule name: Pass Through UPN (or something descriptive)
 - Add the following mapping:
 - i. Incoming claim type: UPN
 - ii. Pass through all claim values
12. Click Finish.
13. In the Rules Editor, click Add Rule, and in the Claim rule template list, select the Pass Through or Filter an Incoming Claim template, and then click Next:
 - Claim rule name: Pass Through Primary SID (or something descriptive)
 - Add the following mapping:
 - i. Incoming claim type: Primary SID
 - ii. Pass through all claim values
14. Click Finish.
15. In the Rules Editor, click Add Rule.

16. In the Claim rule template list, select the Transform an Incoming Claim template, and then click Next.

17. Create the following rule:

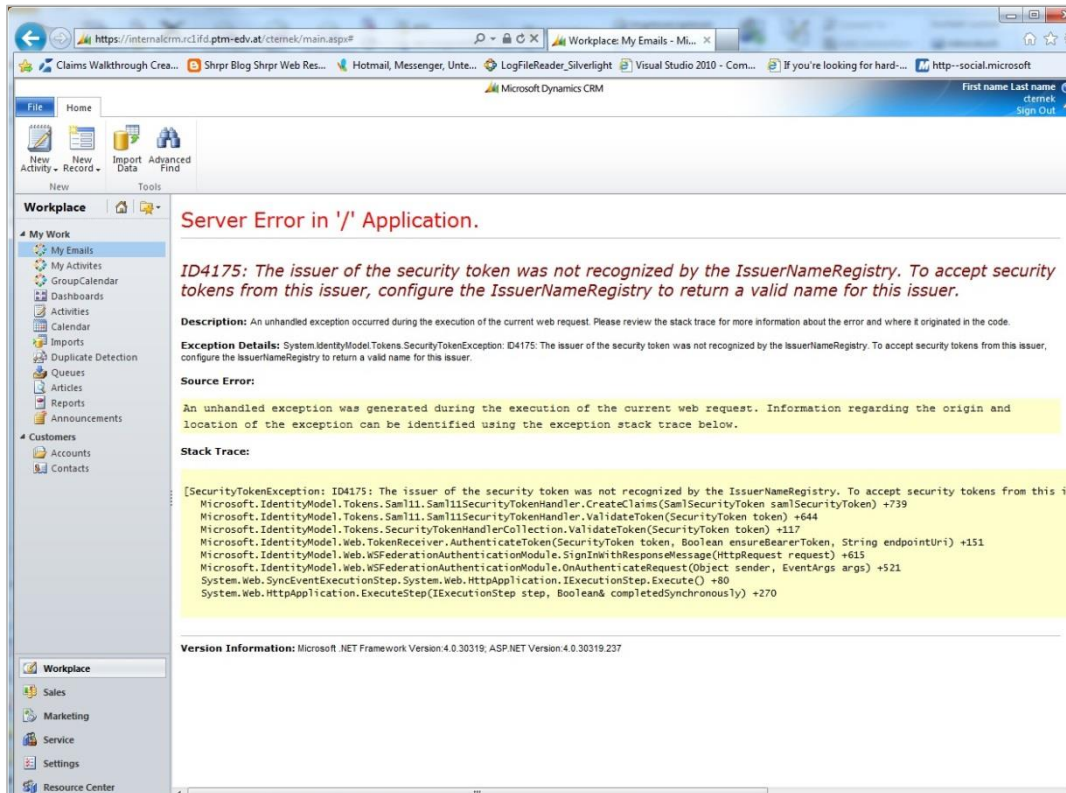
- Claim rule name: Transform Windows Account Name to Name (or something descriptive)
- Add the following mapping:
 - i. Incoming claim type: Windows account name
 - ii. Outgoing claim type: Name
 - iii. Pass through all claim values

18. Click Finish, and when you have created all three rules, click OK to close the Rules Editor.

You have finished the configuration and you should be able to use the Addon in your IFD/Claims Environment now.

Troubleshooting:

If you see the following error, there may be two reasons for this:



Reason 1:

This indicates that you are using a wrong certificate for the ADFS signing. Make sure the thumbprint in the web.config matches the one in the token signing certificate in ADFS.

```
<issuerNameRegistry
type="Microsoft.IdentityModel.Tokens.ConfigurationBasedIssuerNameRegistry,
Microsoft.IdentityModel, Version=3.5.0.0, Culture=neutral,
PublicKeyToken=31bf3856ad364e35">
  <trustedIssuers>
    <add thumbprint="37a59abae1a394ffd8f0fd750c2e38e98069e349"
name="http://win2008domain.ptm-edv.at/adfs/services/trust" />
  </trustedIssuers>
</issuerNameRegistry>
```

If you see the following error:

Server Error in '/' Application.

Keyset does not exist

Description: An unhandled exception occurred during the execution of the current web request. Please review the stack trace for more information about the error and where it originated in the code.

Exception Details: System.Security.Cryptography.CryptographicException: Keyset does not exist

Source Error:

An unhandled exception was generated during the execution of the current web request. Information regarding the origin and location of the exception can be identified using the exception stack trace below.

Stack Trace:

```
[CryptographicException: Keyset does not exist]
System.Security.Cryptography.Utils.CreateProvHandle(CspParameters parameters, Boolean randomKeyContainer) +5557310
System.Security.Cryptography.Utils.GetKeyPairHelper(CspAlgorithmType keyType, CspParameters parameters, Boolean randomKeyContainer, Int32 dwKeySize, SafeProvH
System.Security.Cryptography.RSACryptoServiceProvider.GetKeyPair() +221
System.Security.Cryptography.X509Certificates.X509Certificate2.get_PrivateKey() +516
System.IdentityModel.Tokens.X509AsymmetricSecurityKey.get_PrivateKey() +101
System.IdentityModel.Tokens.X509AsymmetricSecurityKey.DecryptKey(String algorithm, Byte[] keyData) +25
System.IdentityModel.Selectors.SimpleTokenResolver.TryResolveSecurityKeyCore(SecurityKeyIdentifierClause keyIdentifierClause, SecurityKey& key) +319
Microsoft.IdentityModel.Tokens.EncryptedSecurityTokenHandler.ReadToken(XmlReader reader) +290
Microsoft.IdentityModel.Tokens.SecurityTokenHandlerCollection.ReadToken(XmlReader reader) +125
Microsoft.IdentityModel.Web.TokenReceiver.ReadToken(String tokenXml, XmlDictionaryReaderQuotas readerQuotas) +360
Microsoft.IdentityModel.Web.WSFederationAuthenticationModule.SignInWithResponseMessage(HttpRequest request) +417
Microsoft.IdentityModel.Web.WSFederationAuthenticationModule.OnAuthenticateRequest(Object sender, EventArgs args) +521
System.Web.SyncEventExecutionContext.System.Web.HttpApplication.IExecutionStep.Execute() +80
System.Web.HttpApplication.ExecuteStep(IExecutionStep step, Boolean& completedSynchronously) +165
```

Version Information: Microsoft .NET Framework Version:4.0.30319; ASP.NET Version:4.0.30319.17929

Reason 2:

This error could also indicate access rights problems with the certificates private key (Mainly an issue for self-signed certificates).

Open your certificate store on the server (MMC, add certificate snapin for local computer) and find your HTTPS certificate. In the context menu, under all tasks, select the "manage private keys" option and grant access to everyone.

Checklist for general troubleshooting:

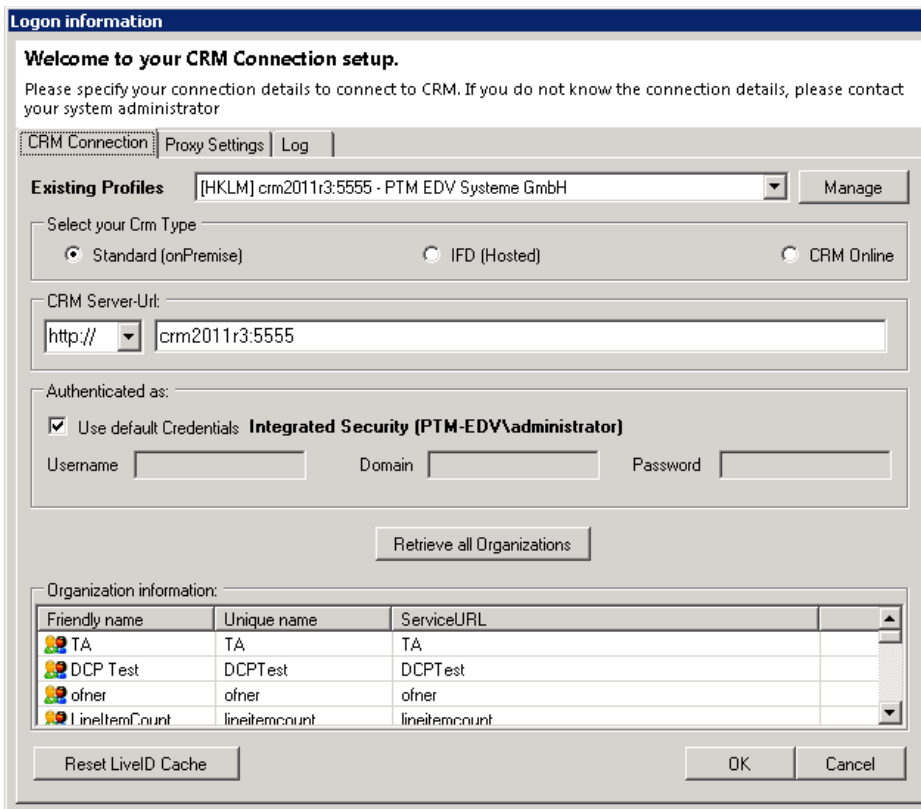
- Is the Setting WebApplicationPort still intact?
- Are there any not http/https bindings in CRM?
- Are there any not http/https bindings in the products website?
- Is the DNS correctly resolving the products link?
- Has the ConnectionProfile been created with IFD as connection type?
- Is the firewall allowing the required ports both internally and externally?

8 ActivityTools Configuration

The ActivityTools for MS CRM 2011 Configuration allows you to specify the ActivityTools-settings.

After starting the ActivityTools Configuration, the following window will open (see screenshot below).

Choose your CRM-server and select an organization. In the second form, press "Launch Config" to continue.



Logon information

Welcome to your CRM Connection setup.
Please specify your connection details to connect to CRM. If you do not know the connection details, please contact your system administrator

CRM Connection | Proxy Settings | Log

Existing Profiles: [HKLM] crm2011r3:5555 - PTM EDV Systeme GmbH [Manage]

Select your Crm Type:
 Standard (onPremise)
 IFD (Hosted)
 CRM Online

CRM Server-Url:
 http:// [crm2011r3:5555]

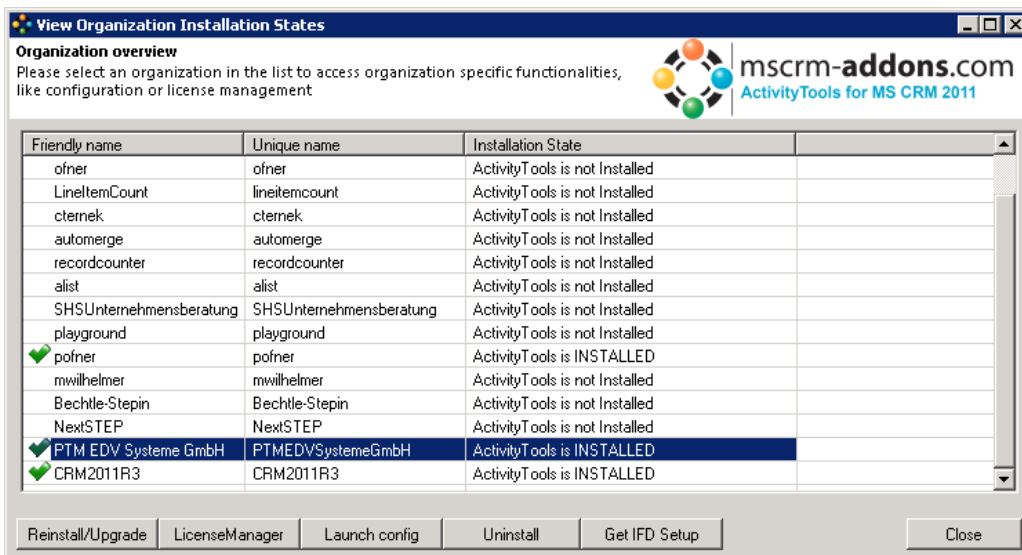
Authenticated as:
 Use default Credentials **Integrated Security (PTM-EDV\administrator)**
 Username [] Domain [] Password []

[Retrieve all Organizations]

Organization information:


Friendly name	Unique name	ServiceURL
TA	TA	TA
DCP Test	DCPTest	DCPTest
ofner	ofner	ofner
LineItemCount	lineitemcount	lineitemcount

[Reset LiveID Cache] [OK] [Cancel]



View Organization Installation States

Organization overview
Please select an organization in the list to access organization specific functionalities, like configuration or license management

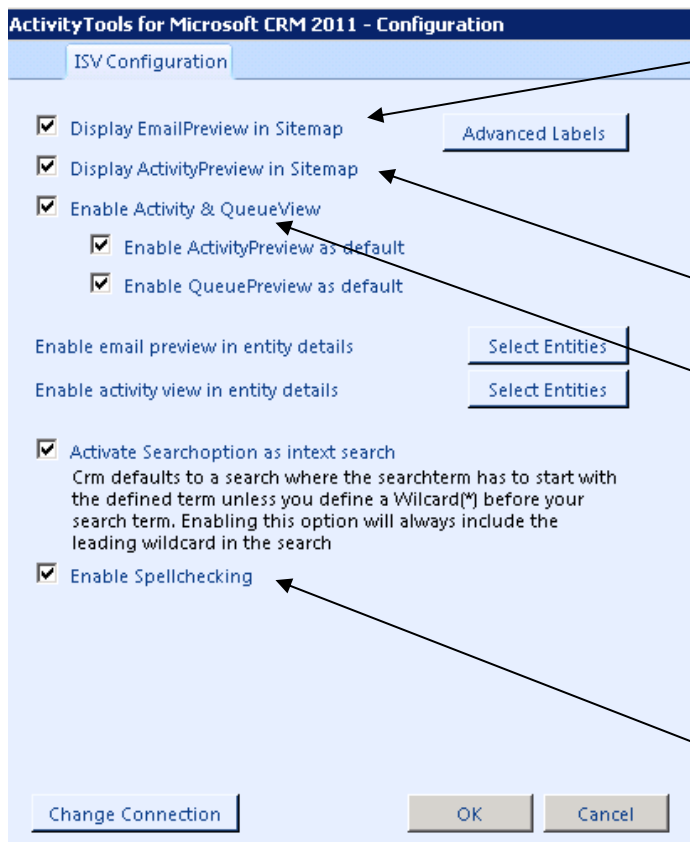


mscrm-addons.com
ActivityTools for MS CRM 2011

Friendly name	Unique name	Installation State
ofner	ofner	ActivityTools is not Installed
LineItemCount	lineitemcount	ActivityTools is not Installed
cternek	cternek	ActivityTools is not Installed
automerge	automerge	ActivityTools is not Installed
recordcounter	recordcounter	ActivityTools is not Installed
alist	alist	ActivityTools is not Installed
SHSUnternehmensberatung	SHSUnternehmensberatung	ActivityTools is not Installed
playground	playground	ActivityTools is not Installed
✓ ofner	ofner	ActivityTools is INSTALLED
mwillhelmer	mwillhelmer	ActivityTools is not Installed
Bechtle-Stepin	Bechtle-Stepin	ActivityTools is not Installed
NextSTEP	NextSTEP	ActivityTools is not Installed
✓ PTM EDV Systeme GmbH	PTMEDVSystemeGmbH	ActivityTools is INSTALLED
✓ CRM2011R3	CRM2011R3	ActivityTools is INSTALLED

[Reinstall/Upgrade] [LicenseManager] [Launch config] [Uninstall] [Get IFD Setup] [Close]

The following window will appear:



Check this option if you want to display "EmailPreview" in the CRM-sitemap.

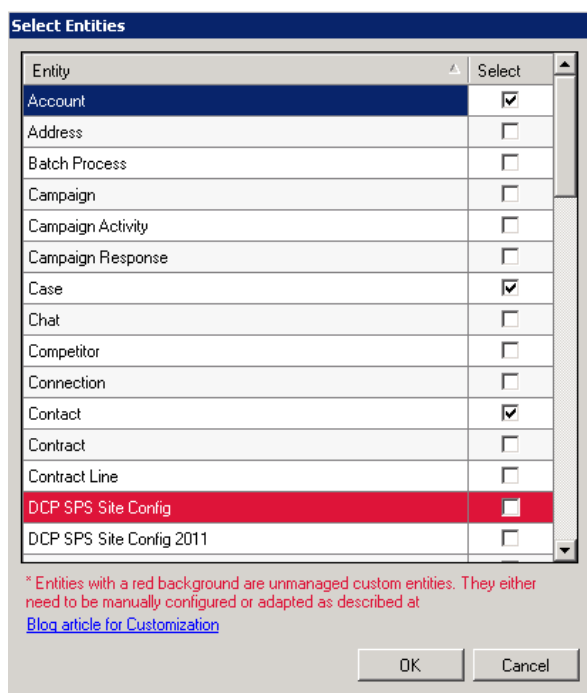
Check this option if you want to display "ActivityPreview" in the CRM-sitemap.

Check this option if you want to display QueueView.

This option allows you to enable / disable the spellchecking-functionality.

Enable the email preview/ activity preview in entity details:

Here you can specify which entities should display the email or activity preview in the entity details. Following window will appear. Check your entities:



Activate the search-option as intext search:

CRM defaults to a search where the search-term has to start with the defined term unless you define a wildcard (*) before your search term. Enabling this option will always include the leading wildcard in the search.

9 Contact

If you have questions to the product send an Email to support@mscrm-addons.com
or visit our blog
<http://blogs.mscrm-addons.com>

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