



**mscrm-addons.com**  
GroupCalendar for MS CRM 3

# How to Install GroupCalendar for MS CRM 3

## **Installation Guide**

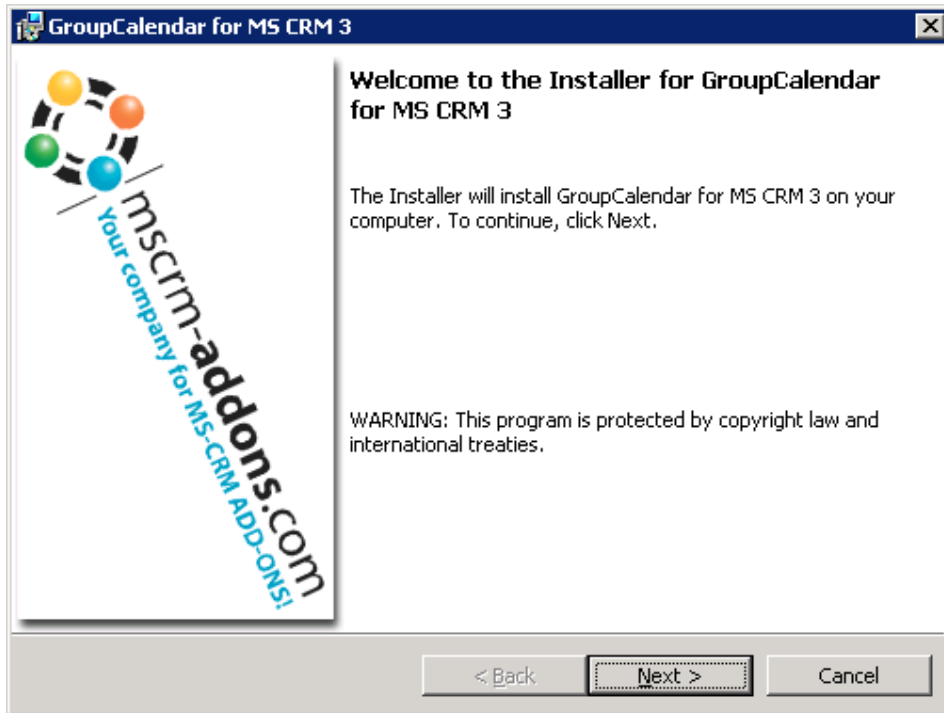
(How to install and setup GroupCalendar for MS CRM 3)

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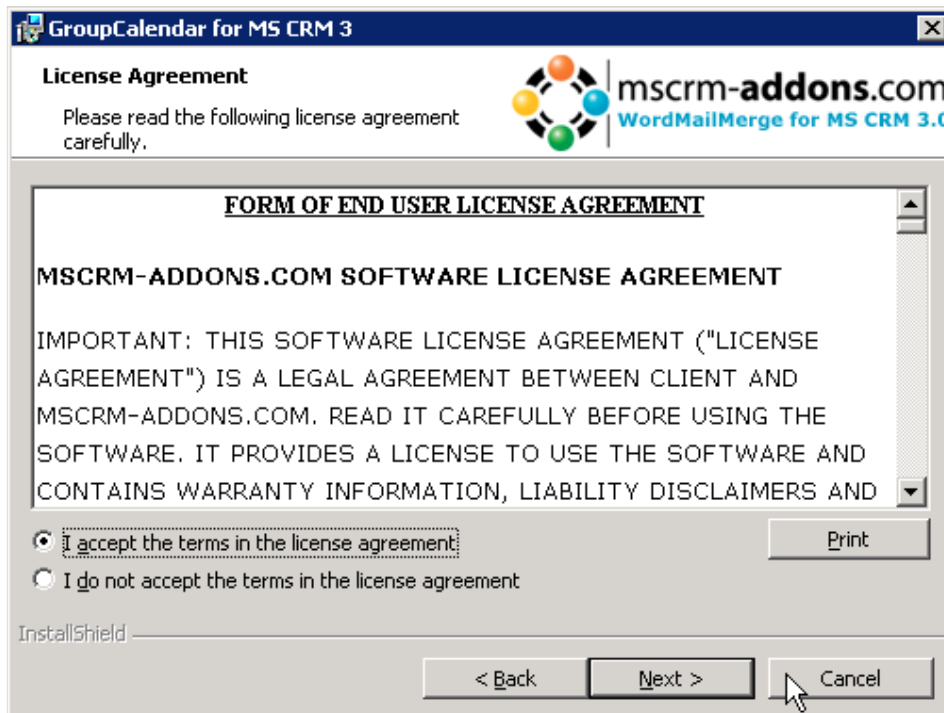
# 1. Installation

1) Run Setup.exe on the MS-CRM Server.

Click „NEXT“ on the Welcome-Page.



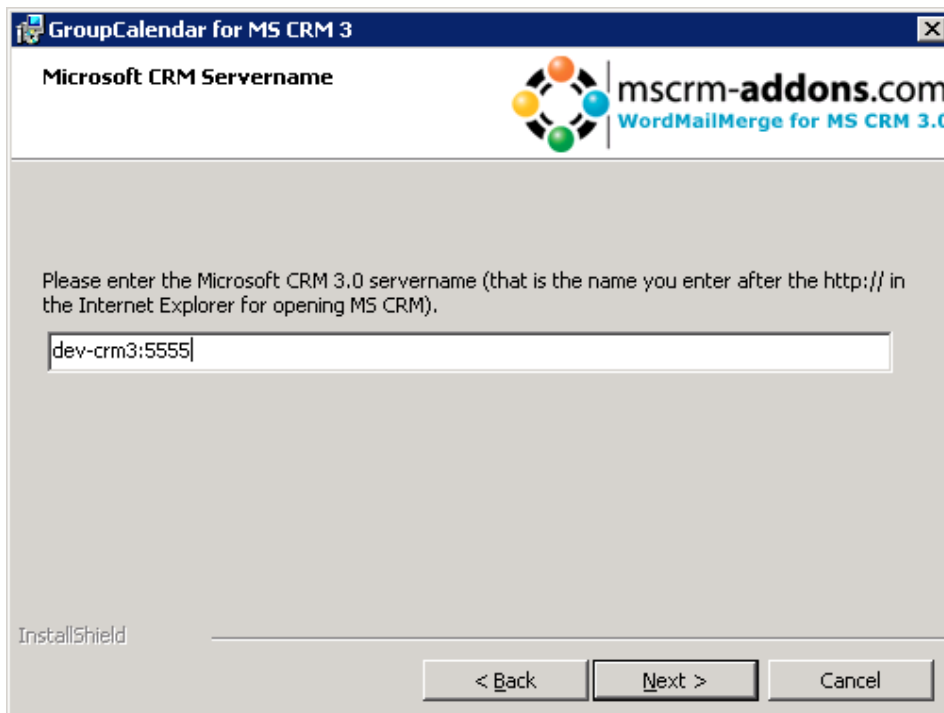
2) License-Page



You have to accept the license and click „NEXT“

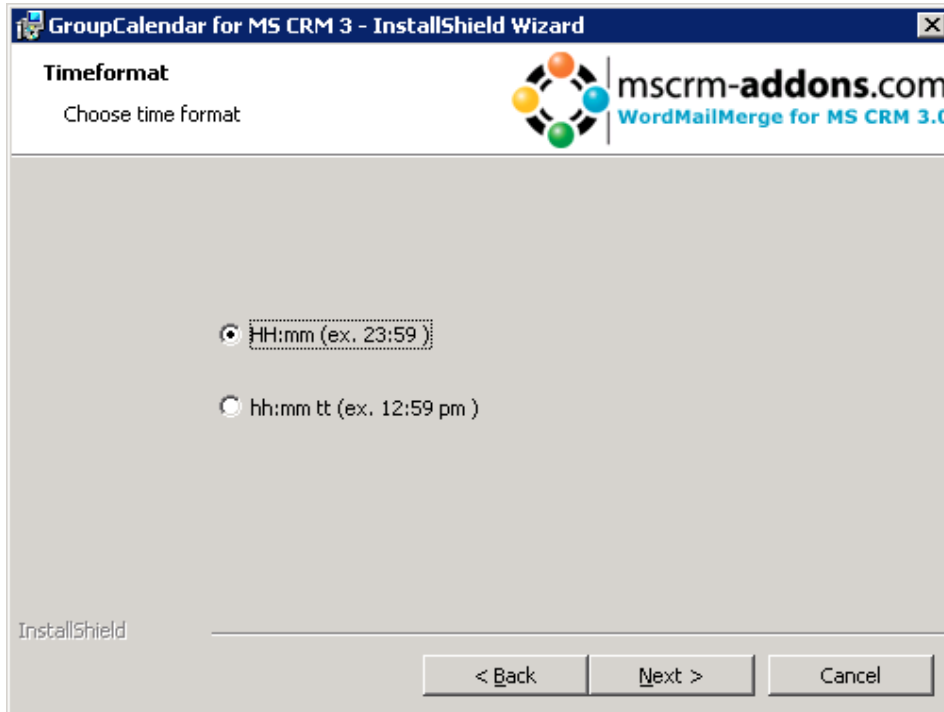
3) CRMServer

Enter the CRMServer-Name( for example : crm) and click „NEXT“



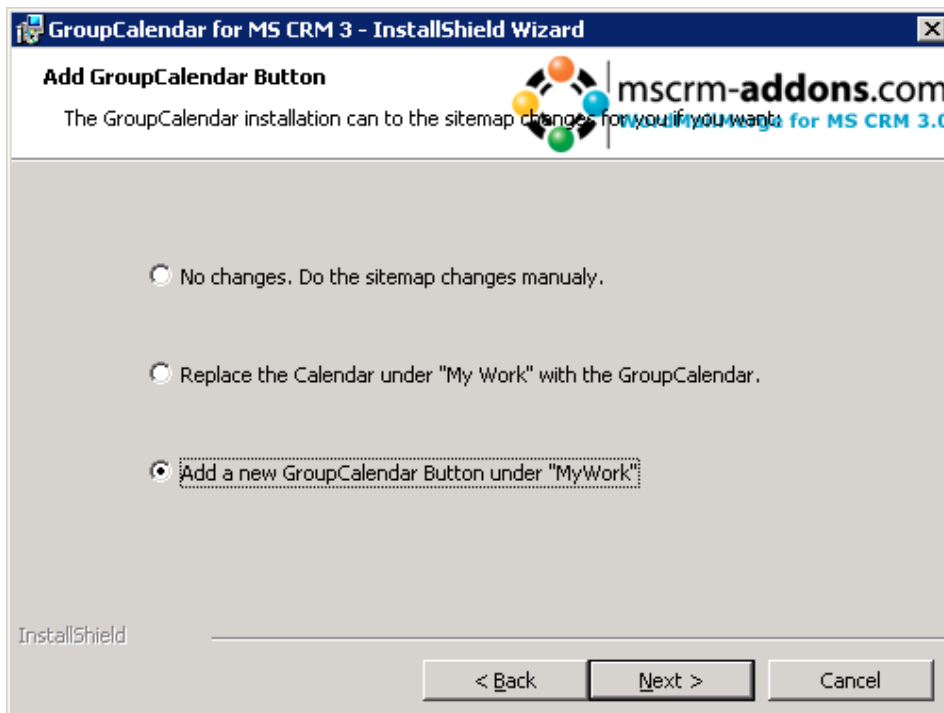
4) Timeformat:

Choose the timeformat(24Hour or 12 Hour forma) you want:

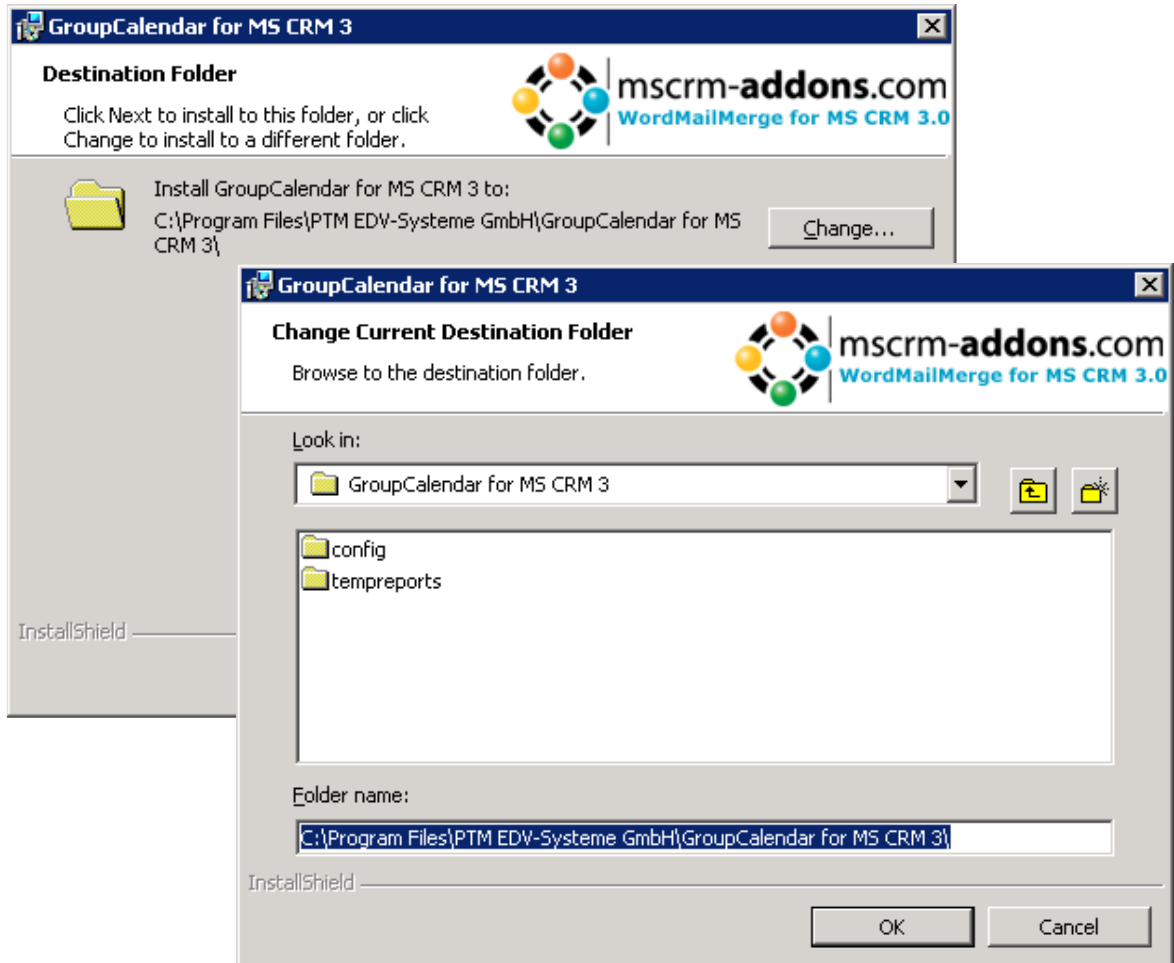


5) Add GroupCalendar Buttons to "My Work":

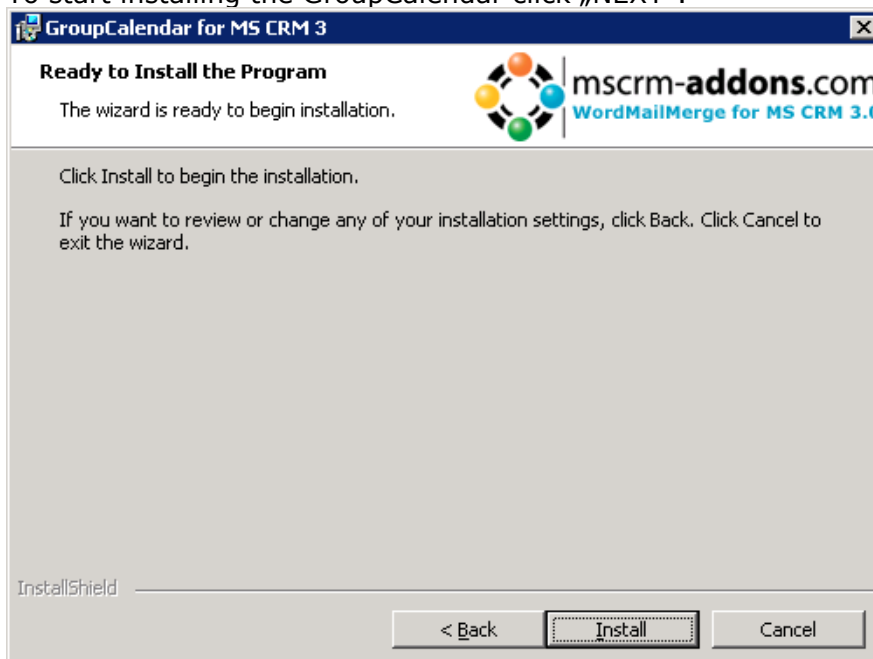
You can decide if you do the changes in the sitemap manually or the installation should do this for you.



6) Choose the installation folder:



7) Confirmation  
To start installing the GroupCalendar click „NEXT“:

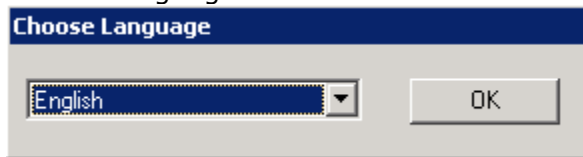


**Normally you will not getting this Page!**

If this Page comes you have entered a wrong „CRMServer“-Name( see Point 3) ort he user you use to install the GroupCalendar is no CRMUser. In that case you have to enter Username,Password and Domain of a valid CRMUser. This is only needed to check if the crm connection works.



8) Choose language:



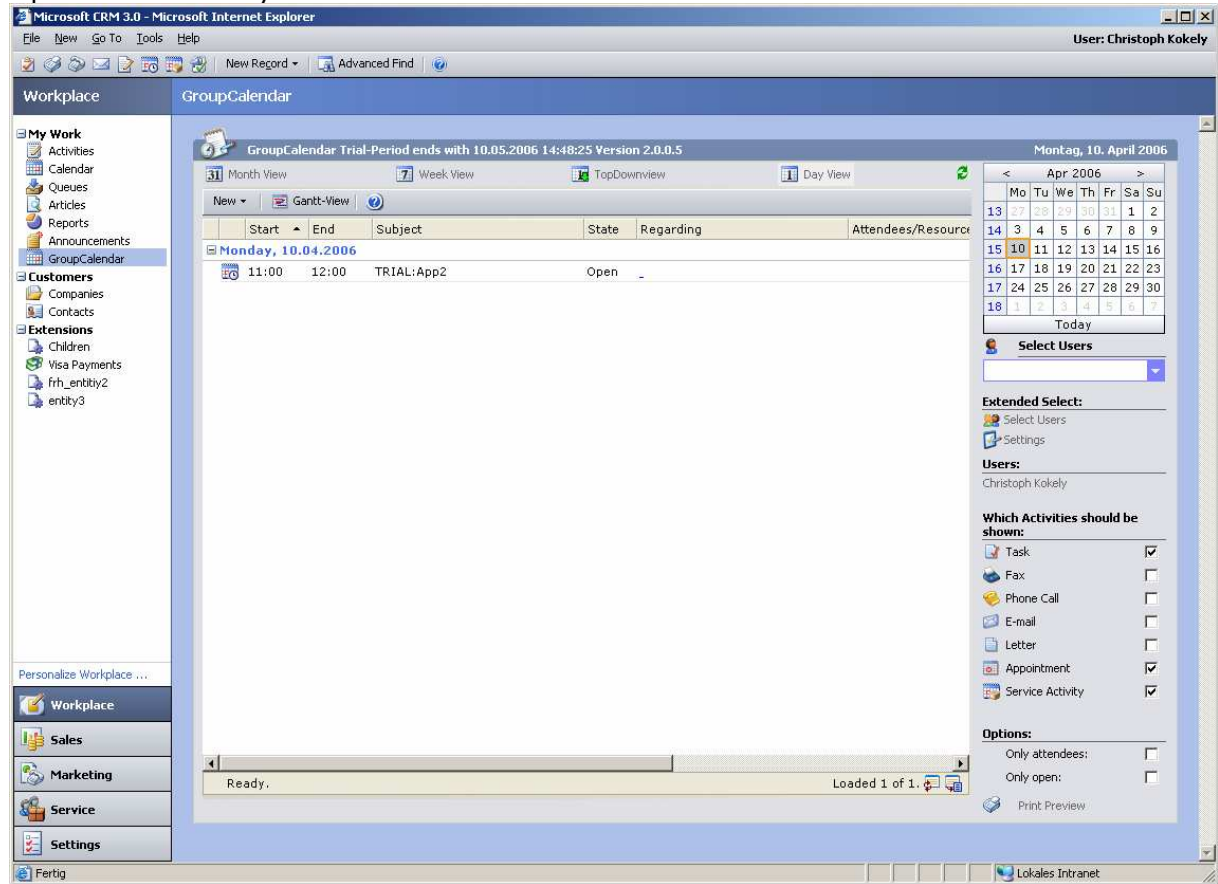
9) Installation is finished.



10) During installation the Folder config situated in the application install directory will receive an update on userrights. The usergroup <everyone> will be added to the folder with full control rights. As the folder is used to store user settings it is required for the users to have at least modify rights in this folder.

## 2. Testing the installation

Open MSCRM and you will see a new Button:



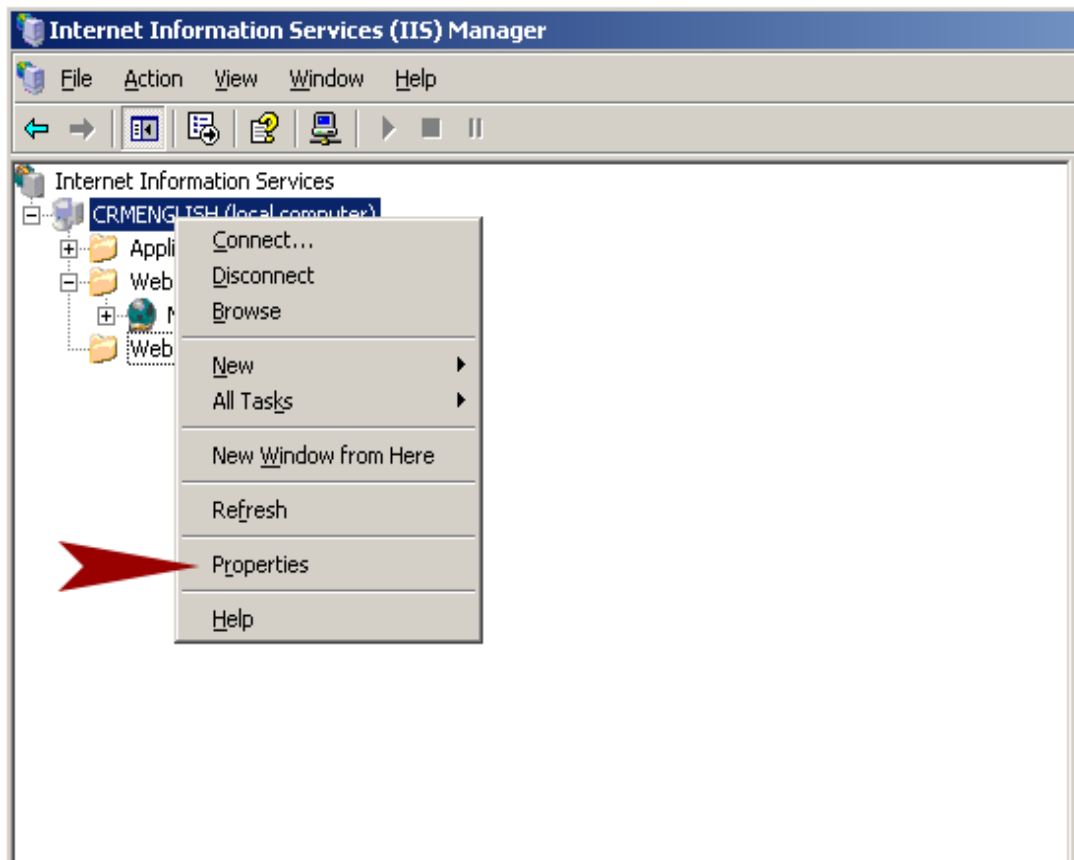
Another way isto open the ie and open: <http://crmserver/groupcalendar/uebersicht.aspx>



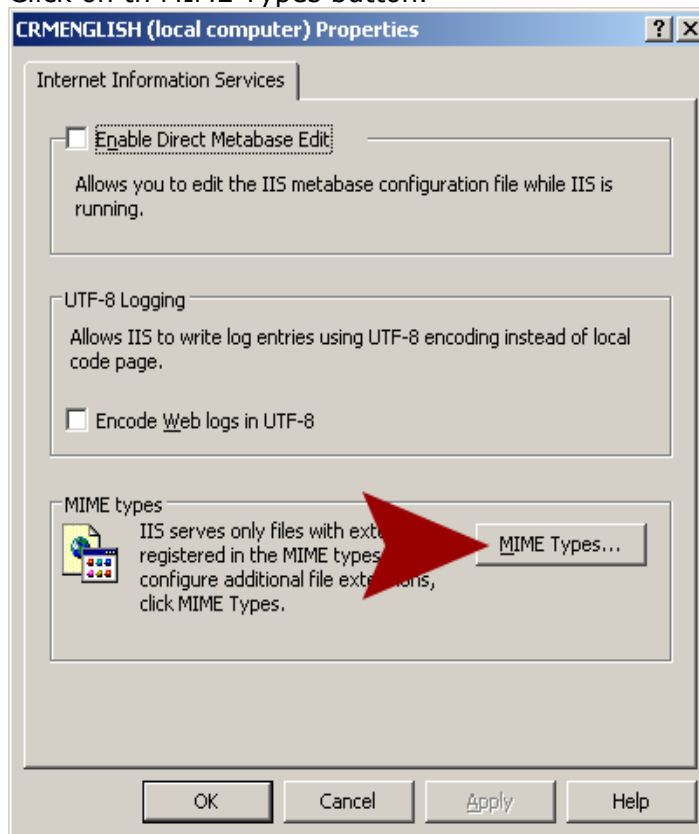
### 3. Troubleshooting

**If you have troubles with the GroupCalendar please go thru the following Steps and check if the GroupCalendar-Installer made the correct entries:**

- 1) If your server OS is Windows 2003 the following steps also required:
  - Open Internet Information Services(IIS) Manager.
  - Right click on the SERVERNAME (local computer) node.

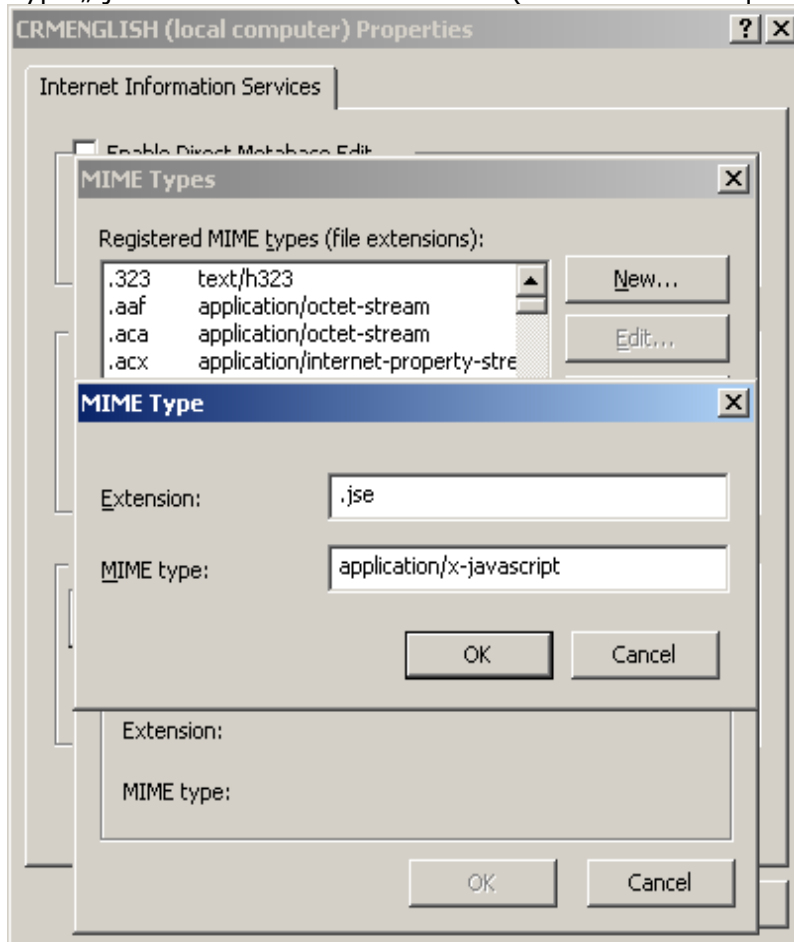


- Click on th MIME Types button.



- Click New to add entry.

- Type „.jse“ in the Extension textbox. (Without double quote)



- Type „application/x-javascript“.(Without double quote)
  - Click OK to close the dialog box. Click OK to close the Property dialog box.
  - Right click on the SERVENAME again.
  - Select „All Tasks“
  - Click „Restart IIS...“ to apply the changes
- 2) Navigate to the GroupCalendar(c:\Program files\PTM EDV-Systeme\GroupCalendar for MS CRM 3) folder created from the setup. Open the web.config and change the „**MSCRMServer**“ value so that it matches the name of your CRM server:

```
<appSettings>
  <add key="MSCRMServer" value="dev-crm" />
</appSettings>
```

### If you have troubles saving user-settings, check the following:

- 1) Navigate to the GroupCalendar (e.g c:\program files\PTM EDV-Systeme\GroupCalendar for MS CRM 3) folder created from the setup.
- 2) Check all users have at least modify rights in the folder config.

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**If you cant see the GroupCalendar in the web or the outlook client, check the following:**

1. Navigate to customizations -> Export customizations and export the sitemap – entity.
2. Open the exported .xml – file with an editor.
3. Search for following entry:  
`<SubArea Id="nav_GroupCalendar" Icon="/_imgs/area/18_calendar.gif"  
Url="/groupcalendar/uebersicht.aspx" Client="All" Title="GroupCalendar"  
<Privilege Entity="activitypointer" Privilege="Read" /></SubArea>`
4. Ensure that "All" is set as Client-value. This means that the Groupcalendar could be accessed through the outlook client as well as the web client.
5. Import the .xml file into the CRM-system again. (Customizations -> import customizations).

If you have problems with the installation send us an Email  
[support@mscrm-addons.com](mailto:support@mscrm-addons.com)

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## 4. Configuration in Detail – Altering the web.config

### WEB.CONFIG

To configure the GroupCalendar you have to open the file „web.config“ (in the groupcalendar-directory).

The „web.config“-File is a XML-File. Search in this file for the section „appsettings“.

```
<appSettings>
  <add key="MSCRMServer" value="crm:5555"/>
  <!-- Language
    Possible languages:
      en .... English
      de .... German
      fr .... French -->
  <add key="Language" value="en"/>
  <!-- Time FORMAT
    Possible formats:
      HH:mm          24 Hour Format (ex.: 23:59          ex.: 01:22)
      hh:mm tt      12 Hour Format (ex.: 12:59 pm        ex.: 1:22 am)
  -->
  <add key="TimeFormat" value="HH:mm"/>

  <add key="debug" value="true"/>
  <add key="debugFileLocation" value="C:\tools"/>
  <add key="UseAbsoluteServerPath" value="true"/>
  <add key="recurringFieldCopy" value=
"scheduledstart;scheduledend;subject;requiredattendees;organizer;optionalattendees;regardingobjectid;owningbusinessunit;description;"/>
  <add key="uniqueIDTarget" value = ""/>
  <add key="Key" value = "trialkey"/>
  <add key="AllowExport" value="true"/>
  <add key="ISO8601WeekNumber" value="true"/>
  <add key="ShowAllActivities" value="false"/>      <!-- Shows all Activities a
user is allowed to see-->
  <add key="httpsconnection" value="false"/>
  <!-- due Date settings -->
  <add key="ignoreStartDateTask" value="false"/>
  <add key="ignoreStartDatePhoneCall" value="true"/>
  <add key="ignoreStartDateLetter" value="true"/>
  <add key="ignoreStartDateEmail" value="true"/>
  <add key="ignoreStartDateFax" value="true"/>
  <!-- display settings-->
  <add key="cbxtask" value="false"/>
  <add key="cbxfax" value="false"/>
  <add key="cbxtelephone" value="false"/>
  <add key="cbxemail" value="false"/>
```

```
<add key="cbxletter" value="false"/>
<add key="cbxappointment" value="true"/>
<add key="cbxonlyattendeess" value="false"/>
<add key="cbxonlyopen" value="false"/>
<!-- Show Attendees/Regarding Columns-->
<add key="cbxattendeess" value="true"/>
<!-- use only the actual start field for searching-->
<add key="cbxactstart" value="true"/>
<!-- Show OwnerColumn-->
<add key="cbxowner" value="true"/>
<!-- ColumnSize in week and dayview-->
<add key="colwidthstart" value="60"/>
<add key="colwidthend" value="60"/>
<add key="colwidthsubject" value="200"/>
<add key="colwidthstate" value="50"/>
<add key="colwidthuser" value="150"/>
<add key="colwidthregarding" value="200"/>
<add key="colwidthattendeess" value="150"/>
<add key="colwidthorganizer" value="250"/>
<!-- ColumnPos in week and dayview-->
<add key="colposstart" value="1"/>
<add key="colposend" value="2"/>
<add key="colpossubject" value="3"/>
<add key="colposstate" value="4"/>
<add key="colposuser" value="8"/>
<add key="colposregarding" value="5"/>
<add key="colposattendeess" value="6"/>
<add key="colposorganizer" value="7"/>

</appSettings>
```

To change the configuration change the value of this keys, please look up the key and check its meaning.

| KEY                 | VALUE  |
|---------------------|--|
| MSCRMServer         | Is the MSCRM servername  |
| Lagnuage            | <p>en ... English<br/>de ... German<br/>fr ... French</p> <p>Each label in the GroupCalendar can be customized.<br/>So it is no problem for you to add new languages.<br/>To add a new language go to the subdirectory „groupaclendar/localization“. There you will find en.xml,de.xml,... Copy the en.xml file save as xy.xml. Change the entries in the xy.xml file and after that change the Language Value in the web.config to „xy“</p> |
| TimeFormat          | <p>HH:mm ... 24Hour-Format(ex. 23:59)<br/>hh:mm tt ... 12Hour-Format (ex. 12:59pm)</p>   |
| Debug               | <p>true .. debug information will be written to „windows\system32\inetsrv\debug.log“<br/>false</p>   |
| debugFileLocation   | Option debug file location, if default location is not desired   |
| recurringFieldCopy  | Defines the fields, that are copied to each activity, when creating a recurring activity   |
| uniqueIDTarget      | <p>This is the name of a field to store an unique GUID for recurring activities. This allows to identify a series of activities, as all share the same value.<br/>The field can be any default or custom field available in the entity activity, that is capable of storing a string with at least 32 chars in length.</p>   |
| httpsconnection     | Defines the usage of a https connection. If a certificate is required, the file c:\clientcert.cer is searched for and used, if available.  |
| ignoreStartDateTask | All ignore... Fields identify, if the activity is shown on the duedate only, or shown from startdate to enddate.   |
| cbxtask             | Default-value for the checkbox TASK  |
| cbxfax              | Default-value for the checkbox FAX   |
| cbxtelephone        | Default-value for the checkbox TELEPHONE   |
| cbxemail            | Default-value for the checkbox EMAIL   |
| cbxletter           | Default-value for the checkbox LETTER  |
| cbxappointment      | Default-value for the checkbox APPOINTMENT   |

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|                   |  |
|-------------------|--|
| cbxonlyattendeess | Default-value for the checkbox ONLYATTENDEES   |
| Cbxonlyopen       | Default-value for the checkbox ONLYOPEN        |
| ShowAllActivities | Shows all activities a user is allowed to see. |
| cbxattendeess     | Show Attendees/Regarding Columns               |
| cbxactstart       | use only the actual start field for searching  |
| cbxowner          | Show OwnerColumn                               |
|                   |  |

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