How to Install GroupCalendar for MS CRM 4

Installation Guide
(How to install and setup GroupCalendar for MS CRM 4)

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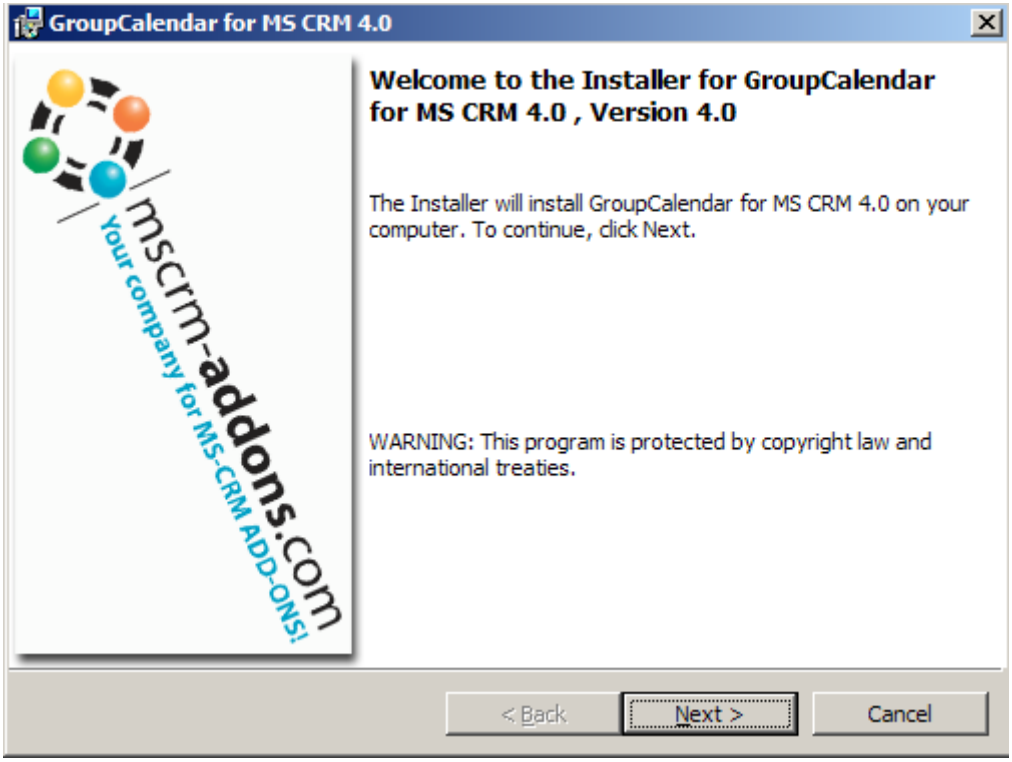
1. Installation

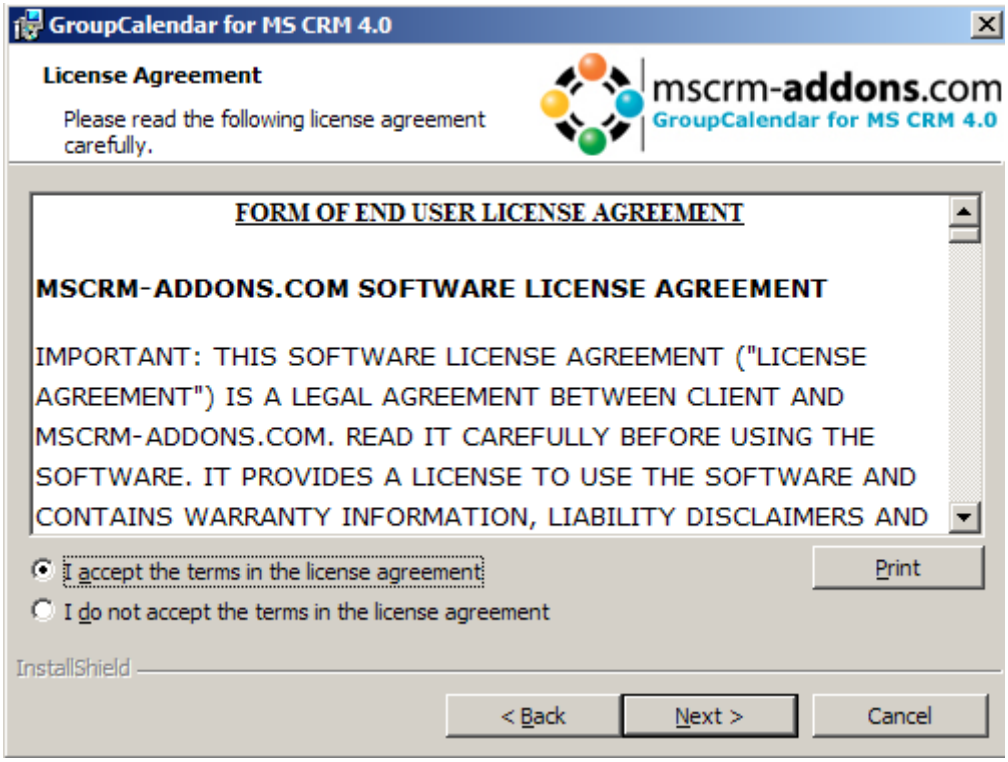
The user must be online during the installation.

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

   Click „NEXT" on the Welcome-Page.



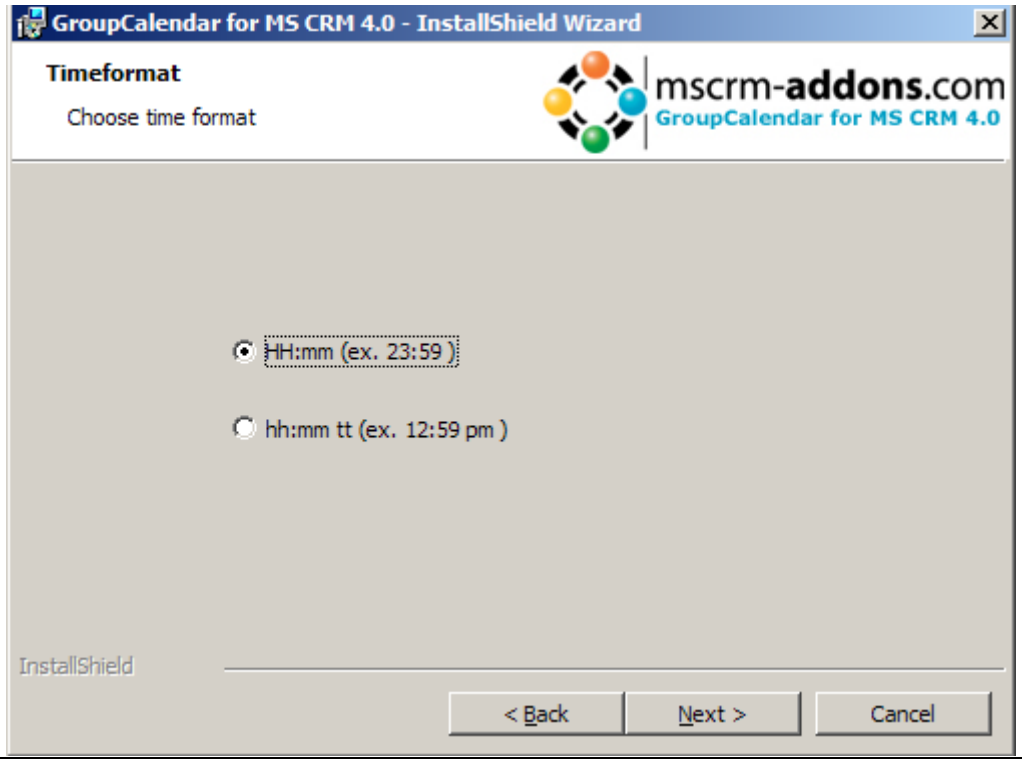
2) License-Page



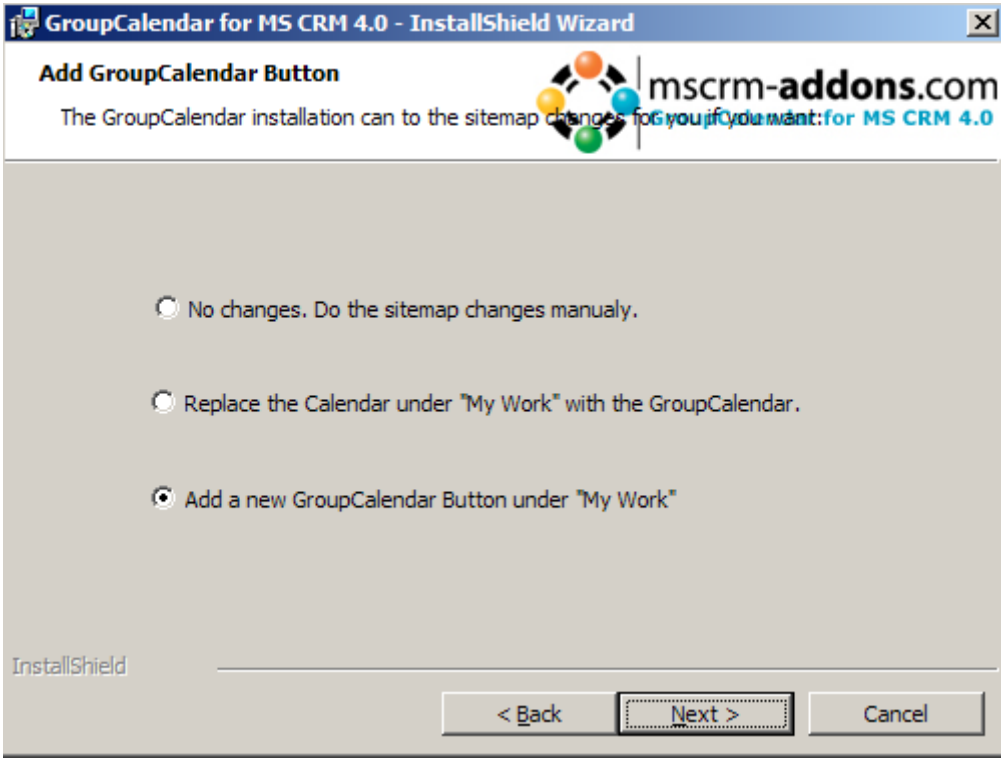
You have to accept the license and click „NEXT"

3) Timeformat:

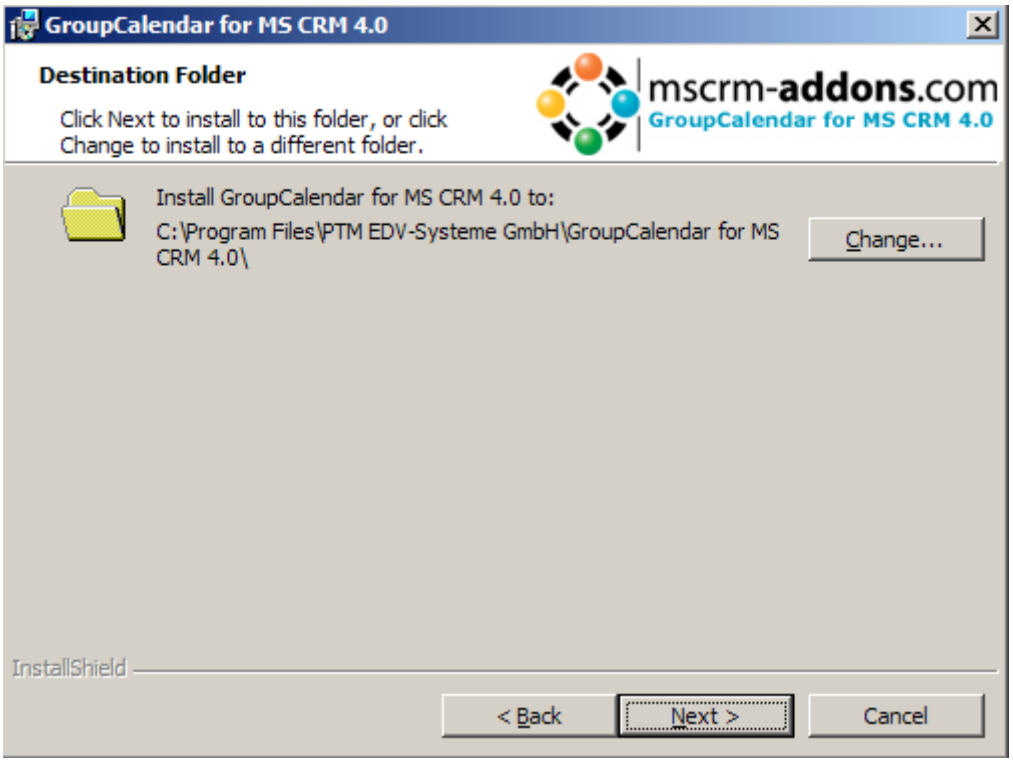
Choose the timeformat (24Hour or 12 Hour format) you want:



4) 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.

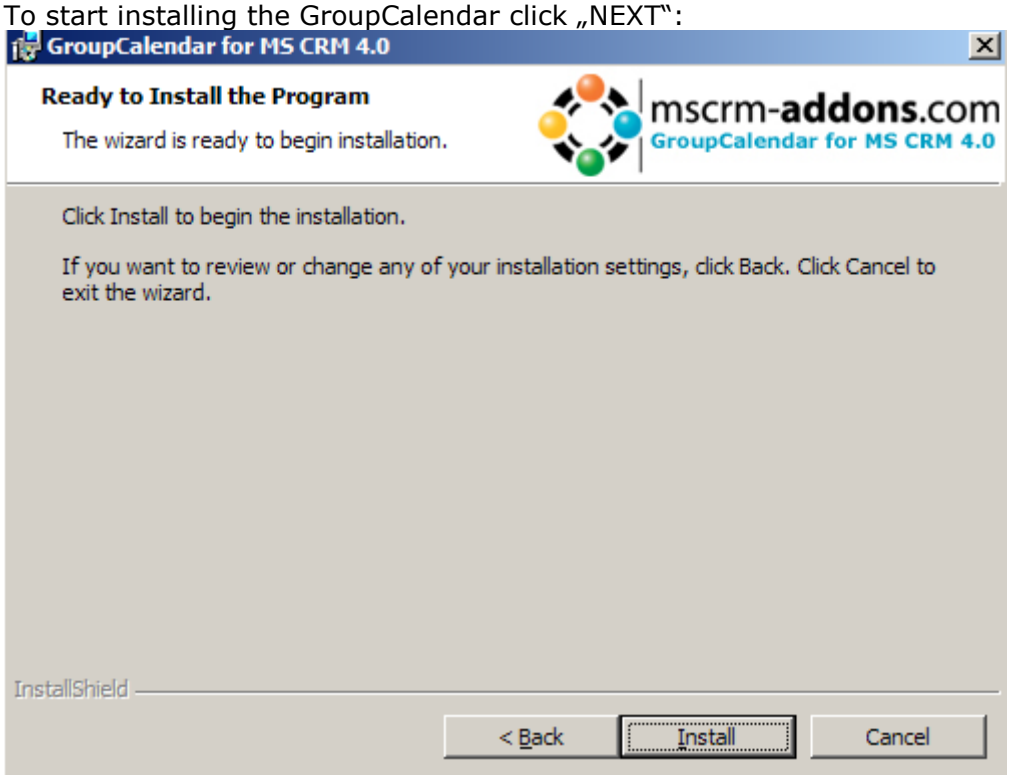


5) Choose the installation folder:



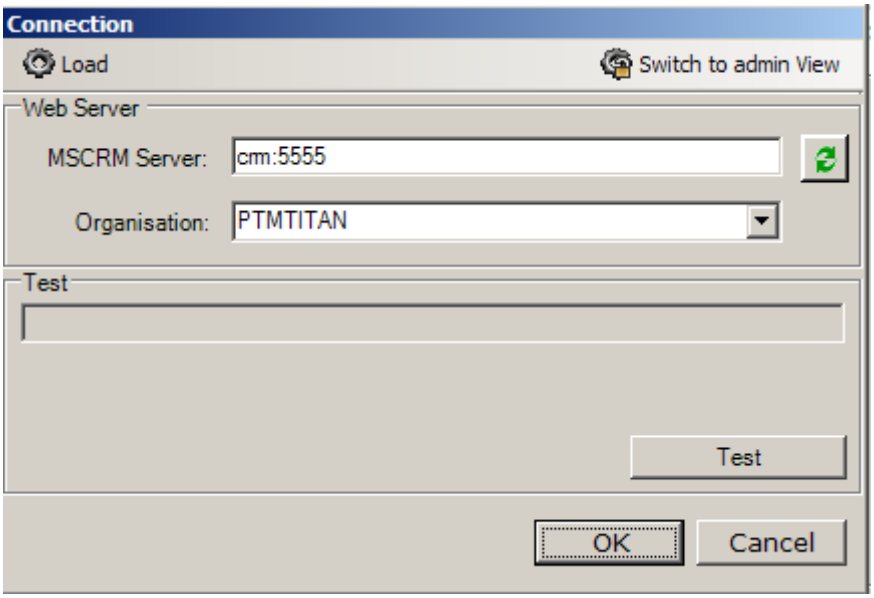
6) Confirmation

To start installing the GroupCalendar click „NEXT":

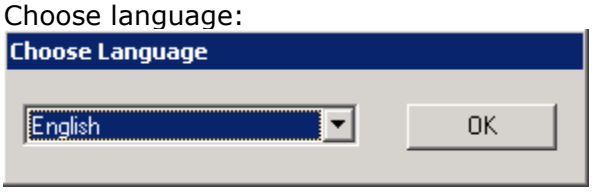


7) CRMServer

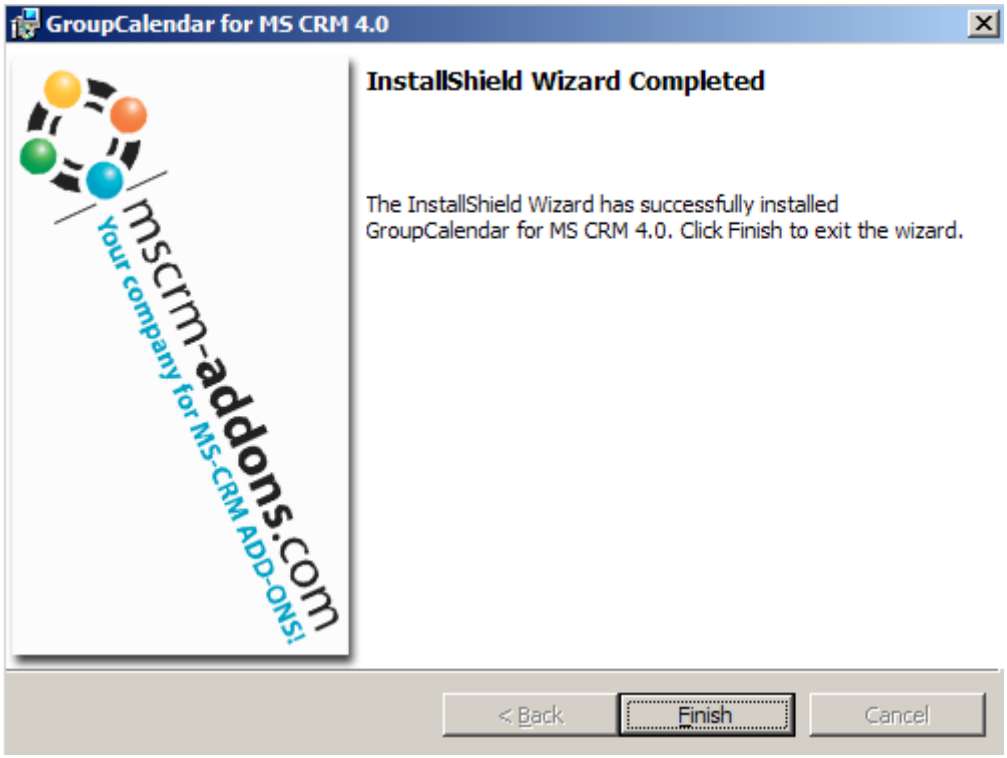
Enter the CRMServer-Name(for example : crm:5555), select the Organisation, test the connection and click "OK"



8) Choose language:



9) Installation is finished.



10) During installation the Folder config situated in the application install directory will receive an update on user rights. 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. Changes in CRM

GroupCalendar will change a few things during the installation. Here is a overview of every change in your CRM during the GroupCalendar Installation.

Following entities will be imported:

- **mscrm-addons key (Schema Name: new_mscrmaddons_key)**
  - Custom-Attributes:
    - new_iscached (bit)
    - new_keyname (nvarchar)
    - new_keyvalue (ntext)
    - new_mscrmaddons_keyid (primarykey)
    - new_mscrmaddons_settings (lookup)

- **mscrm-addons settings (Schema Name: new_mscrmaddons_settings)**
  - Custom Attributes:
    - new_mscrmaddons_settingsid (primarykey)
    - new_productkey (nvarchar)
    - new_productname (nvarchar)
    - new_producttype (nvarchar)

- **mscrm-addons temp (Schema Name: new_mscrmaddonstemp)**
  - Custom Attributes:
    - new_mscrmaddonstempid (primarykey)
    - new_name (nvarchar)
    - new_value (ntext)

- **Recurring Activity (Schema Name: ptm_recurringactivity)**
  - Custom Attributes
  - ptm_activitytype (picklist)
  - ptm_enddate (datetime)
  - ptm_fieldvalues (ntext)
  - ptm_lastactivity (datetime)
  - ptm_lastexecutiondate (datetime)
  - ptm_monthlytype (int)
  - ptm_name (nvarchar)
  - ptm_recurringactivityid (primarykey)
  - ptm_seriestype (picklist)
  - ptm_takeownership (bit)
  - ptm_weeklytype (nvarchar)
  - ptm_yearlytype (datetime)

Changes in the Sitemap:

- GroupCalendar will be added to Workplace -> My Work or default CRM calendar will be overwritten (depending on the installation option you selected)
- A link to the mscrm-addons settings entity will be added to the Settings-section

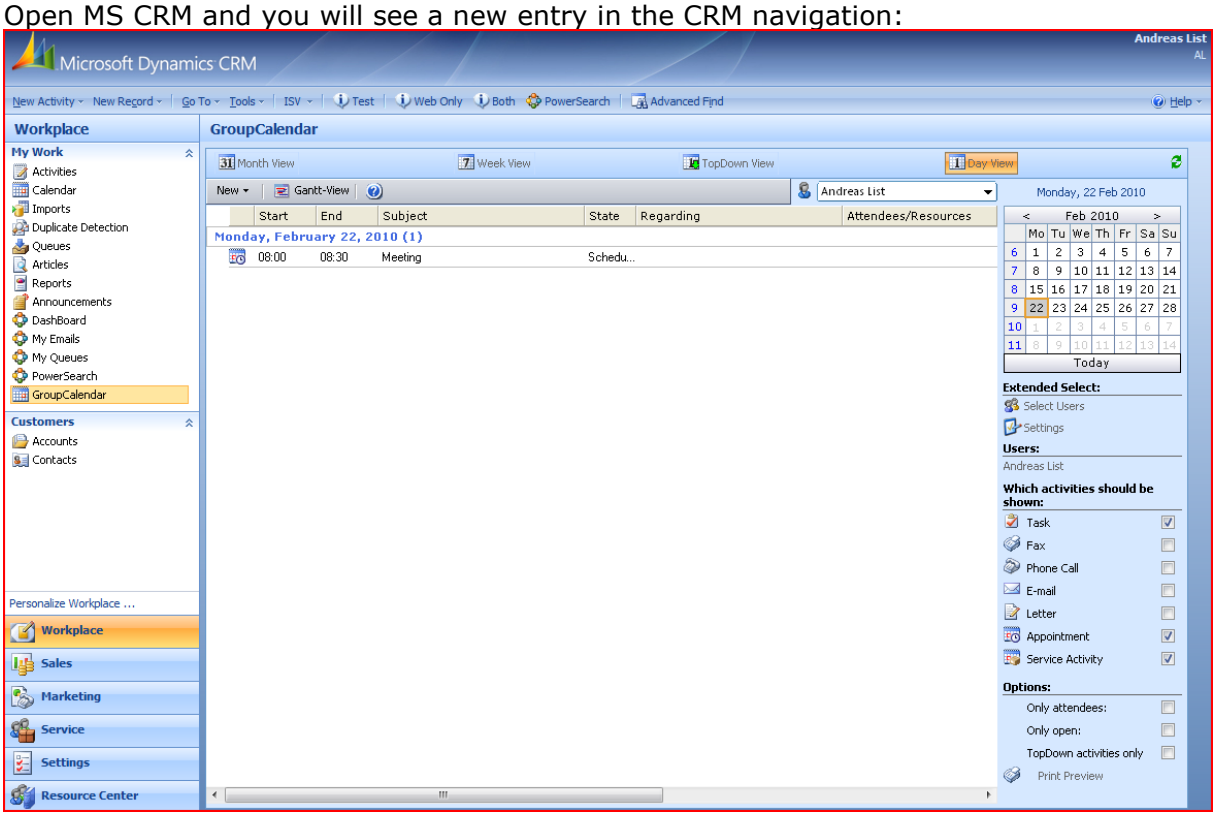
Changes in the ISVConfig:
Four additional buttons on the task, phonecall and appointment entity: "Recurring Activity", "Apply to series", "Delete Activity" and "Cancel Activity"

Five additional workflows will be imported:

- Recurring Activity – Create new "Phone Call" – delete
- Recurring Activity – Create new "Phone Call" – statuschange
- Recurring Activity – Create new "Task" – delete
- Recurring Activity – Create new "Task" – statuschange
- Recurring Activity – Reminder for last occurrence of an activity

3. Testing the Installation

Open MS CRM and you will see a new entry in the CRM navigation:



Another way is to open the Internet Explorer and open:
http://server:port/GroupCalendar/forms/uebersicht.aspx?orgname=YOURUNIQUEORGANIZATIONNAME

4. 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.

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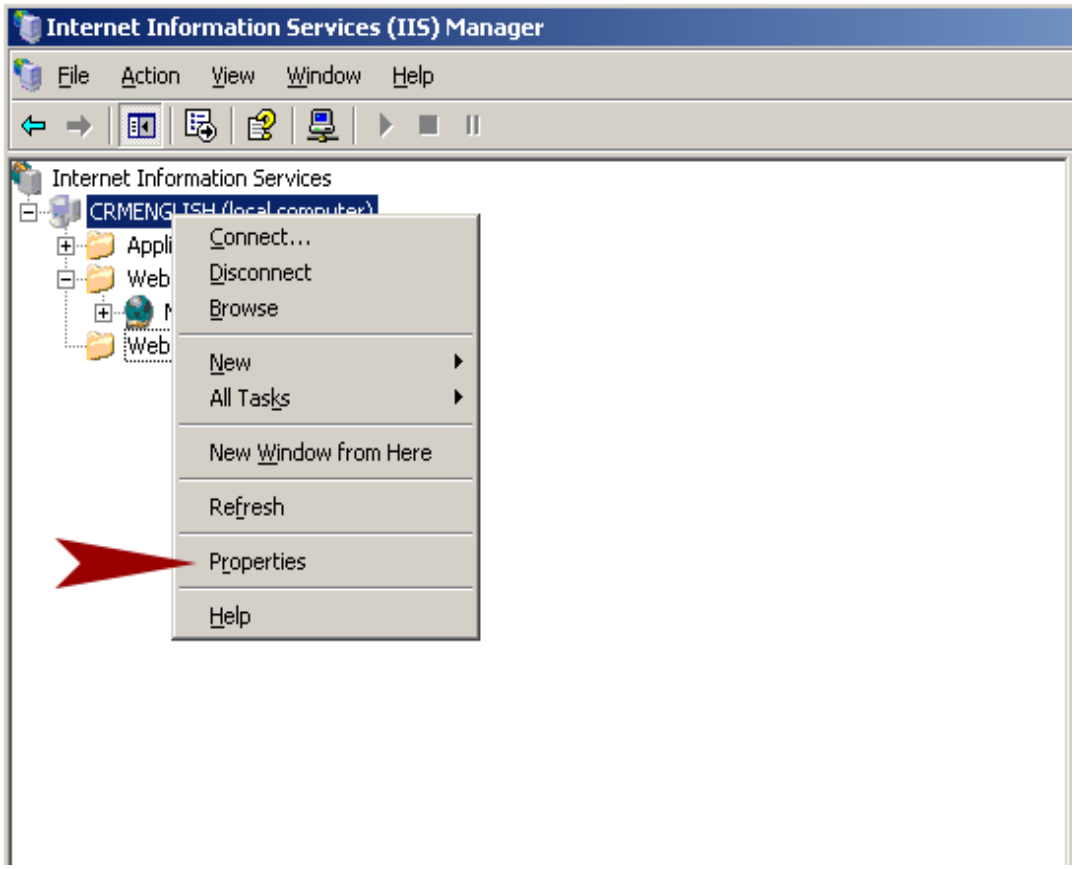
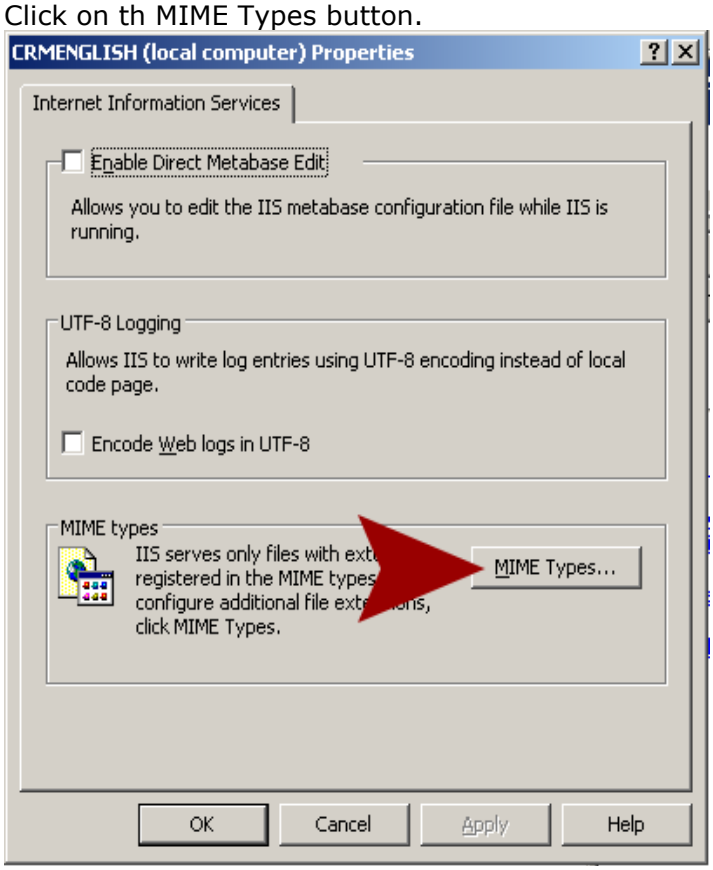
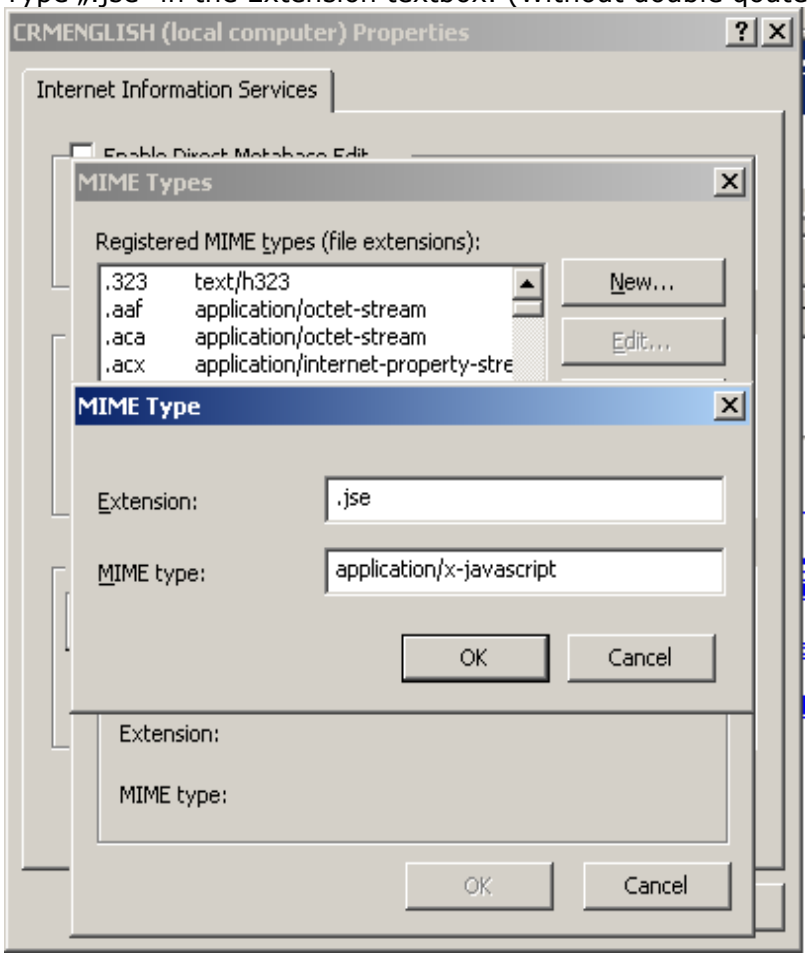


- Click on th MIME Types button.



- Click New to add entry.

- Type „.jse" in the Extension textbox. (Without double qoute)



- Type „application/x-javascript".(Without double quote)
- Click OK to close the dialog box. Click OK to close the Propterty dialog box.
- Right click on the SERVENAME again.
- Select „All Tasks"
- Click „Restart IIS…" to apply the changes

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 4) folder created from the setup.

2) Check all users have at least modify rights in the folder config.

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/forms/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).

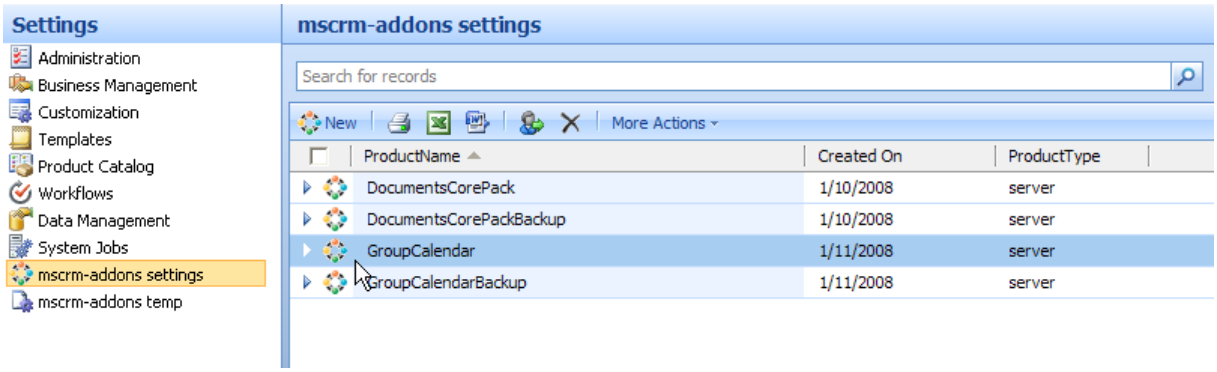
If you have problems with the installation send us an Email
support@mscrm-addons.com

Support of mscrm-addons.com

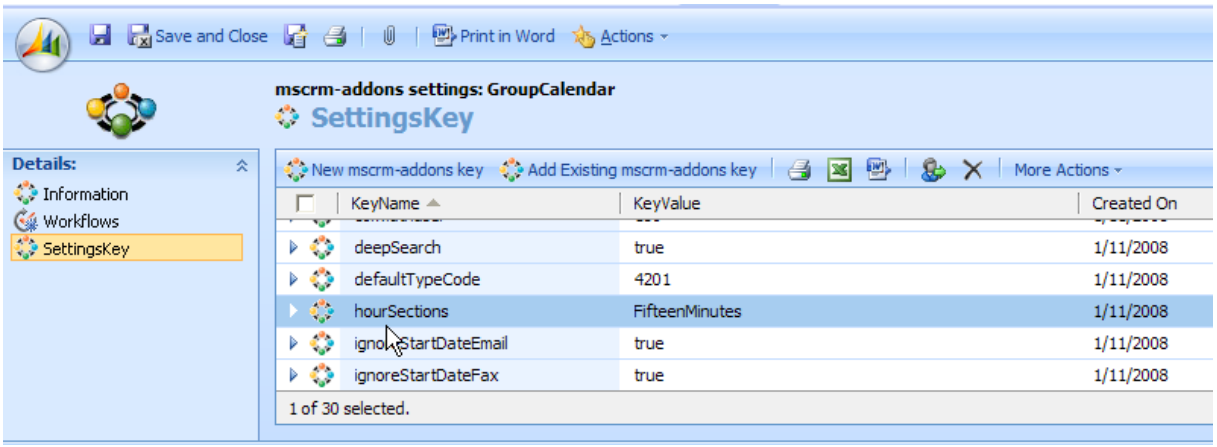
5. Configuration in Detail – GroupCalendar settings

Settings

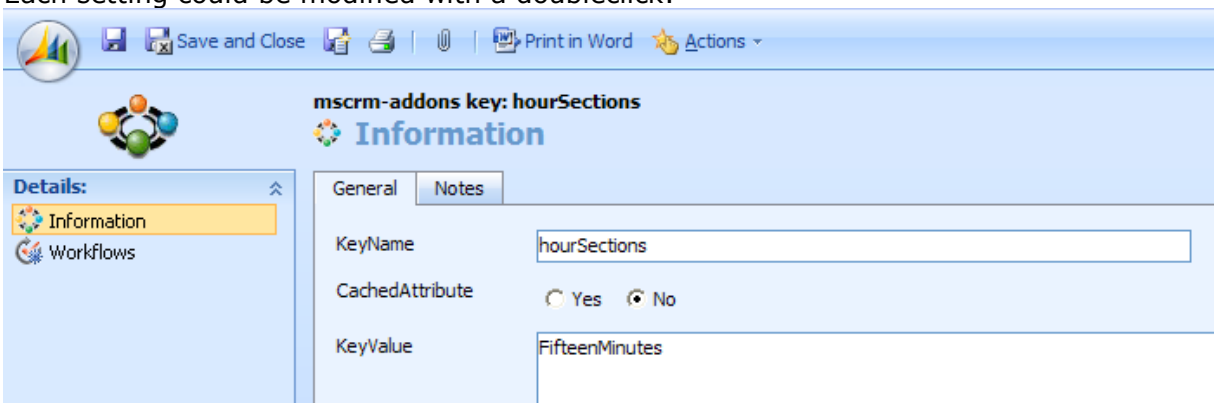
To configure the GroupCalendar, you have to open the GroupCalendar settings within CRM. (Settings -> mscrm-addons settings ->GroupCalendar)



All possible settings are located under "SettingsKey"



Each setting could be modified with a doubleclick:

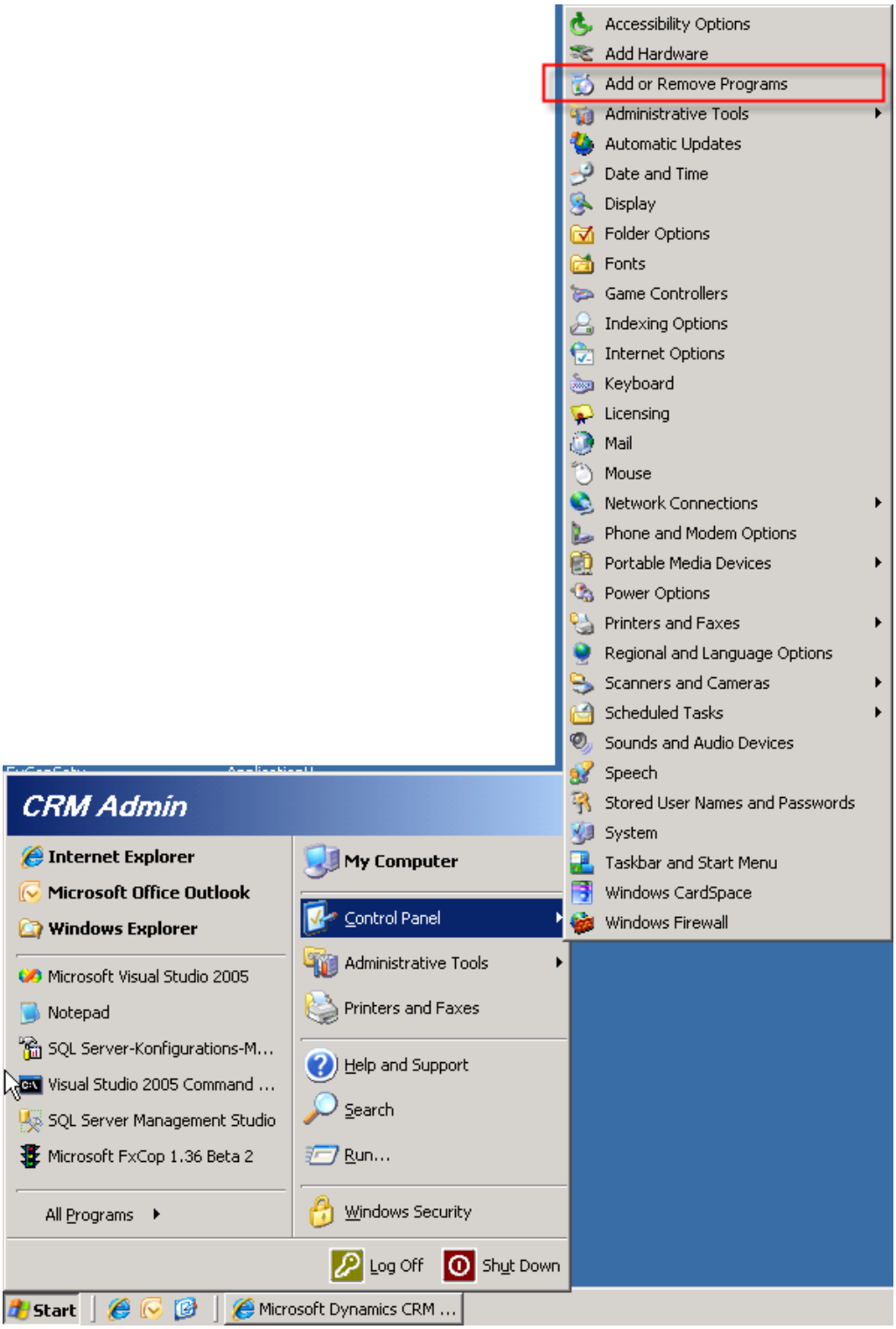


KEY	DESCRIPTION
Language	en … English de … German fr … French Per default the CRM User Language is used. But when this language does not exist for GC, the language configured here is used. Each label in the GroupCalendar can be customized. So it is no problem for you to add new languages. To add a new language go to the subdirectory „App_Data\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 settings entity to „xy"
TimeFormat	HH:mm … 24Hour-Format(ex. 23:59) hh:mm tt … 12Hour-Format (ex. 12:59pm)
CalendarWeekRule	Possible Values: - FirstDay - FirstFourDayWeek - FirstFullWeek Specifies the rule how the week number should be calculated
recurringFieldCopyAppointment recurringFieldCopyTask recurringFieldCopyPhonecall recurringFieldCopyServiceAppointment	Defines the fields, that are copied to each activity, when creating a recurring activity. All attribute types are supported
ignoreStartDateTask ignoreStartDateLetter ignoreStartDateFax ignoreStartDateEmail ignoreStartDatePhonecall	All fields identify, if the activity is shown on the due date (minus duration) only, or shown from start date to end date. Possible Values: - true: Activity is shown from due date minus duration till due date - false: activity is shown from start date till due date
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
cbxonlyattendees	Default-value for the checkbox ONLYATTENDEES
cbxonlyopen	Default-value for the checkbox ONLYOPEN

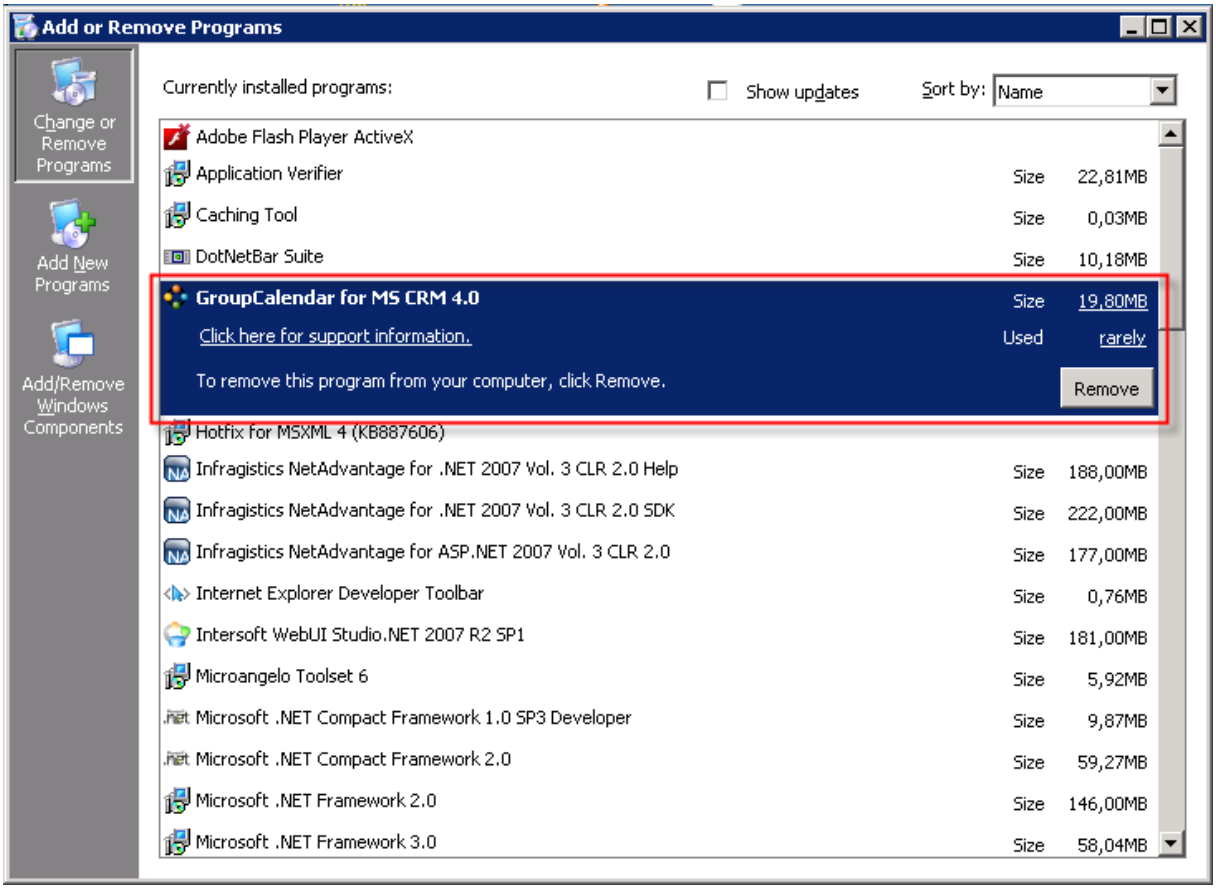
ShowAllActivities	Shows all activities a user is allowed to see.
cbxattendees	Show Attendees/Regarding Columns
cbxactstart	use only the actual start field for searching
cbxowner	Show OwnerColumn
DoNotShowWebCombo	You could disable the WebCombo for the users, teams and advanced finds. This makes sense when you have a really large number of users and teams. It could slow down GC drastically. You could then select users/teams via the advanced user select dialog
ignoreWeekendDefault	When creating recurring activities you've the possibility to ignore weekends. The activity will then be created the business day before. Here you can specify globally if the checkbox should be checked or not Possible values: - true - false
isMondayWeekday isTuesdayWeekday isWednesdayWeekday isThursdayWeekday isFridayWeekday isSaturdayWeekday isSundayWeekday	You could specify which days of the week are working days and which are weekend days. Possible Values: - true - false
hourSections	You could configure the default timeslot height of the TopDown View Possible Values: FifteenMinutes, FiveMinutes, FourHours, FourMinutes, OneMinute, SixMinutes, SixtyMinutes, TenMinutes, ThirtyMinutes, ThreeHours, ThreeMinutes, TwelveMinutes, TwentyMinutes, TwoHours, TwoMinutes
ScrollHourTopDown	Specify to which hour the TopDown view should scroll when opening. Possible Values: 1 - 24

6. Uninstall GroupCalendar

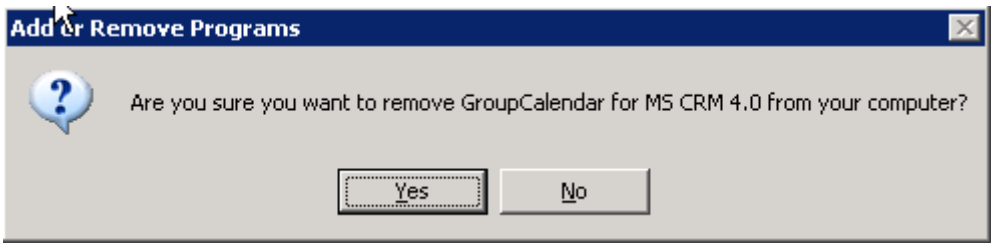
To uninstall GroupCalendar, open "Add or Remove Programs"



Find "GroupCalendar for MS CRM 4.0", select it and click on "Remove"



Confirm the question if you're sure to uninstall GroupCalendar



It may take a few minutes to uninstall GroupCalendar.

If you have problems with the installation send us an Email
support@mscrm-addons.com

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