

mscrm-addons.com
DocumentsCorePack
for Microsoft Dynamics CRM

GroupCalendar for MS CRM 2015/2016 and Microsoft Dynamics 365

v.2.2, April 2017

Installation Guide

(How to install/uninstall GroupCalendar for MS CRM 2015/2016 and MS Dynamics 365)

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Preamble

This documentation is intended to guide you through the installation of GroupCalendar in Microsoft Dynamics CRM.

This guide applies to version 2015.109 or higher.

Please read this document carefully and follow the steps as described to achieve the described results.

Target Audience

This guide is intended for users applying search queries with PowerSearch who have the following minimum skills:

- Basic Microsoft Dynamics CRM Knowledge
- Maintaining and configuring a Microsoft CRM Organization
- Basic XML knowledge

Supported Web Browsers and versions

Supported Web Browsers:

- Internet Explorer 10 and higher
- Chrome
- Edge
- Firefox

One of the following versions of Microsoft Dynamics CRM must be available:

- Microsoft Dynamics CRM Server 2015/2016
- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online

Purpose of GroupCalendar?

GroupCalendar facilitates – among other things – scheduling in Microsoft Dynamics CRM. More than six different views allow you to schedule users, teams, resources and/or facilities in no time. Thus, GroupCalendar provides powerful scheduling options.

Because of its elaborated functionalities, GroupCalendar is the perfect scheduling tool:

- (Re-) schedule service activities/appointments via drag and drop
- Working hours Integration
- Color-Coding to keep a compact overview
- Printing option for views
- More than six different views for users, teams and/or resources
- Definition of teams, and resource groups
- Advanced Find

1 How to install GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365 (CRM)

Because GroupCalendar(GC) can be installed and integrated in Microsoft Dynamics CRM on premise or online, there are two different ways to install our add-on:

Install GC in Microsoft Dynamics CRM ON PREMISE via .msi.file ([SEE CHAPTER 1.1 HOW TO INSTALL GROUPCALENDAR VIA .MSI-FILE, PAGE 6](#))

Install GC in MS Dynamics CRM ONLINE via AppSource ([SEE CHAPTER 1.2 HOW TO INSTALL GROUPCALENDAR VIA APPSOURCE \(CRM ONLINE ONLY\), PAGE 15](#))

1.1 How to install GroupCalendar via .msi-file

Installing GroupCalendar via .msi-file import means that you have decided to go with a local installation. During the course of the chapter you will find detailed information on how to install the .msi-file correctly. Our starting point is the Download area at our homepage.

1.1.1 How to get the data required for the installation

To get the required data for the installation, login to our Download Area on

<http://www.msCRM-addons.com/Downloads/GroupCalendarforMSCRM2015>

Installer

Title	Category	Modified Date	Size
GroupCalendar for MS CRM 2015 / CRM 2016	v2015.109	8/9/2016	37.19 MB

Figure 1: GroupCalendar – Download .zip-file

Click on the [**Download**]-button and you will receive a file that contains all the required data for the installation.

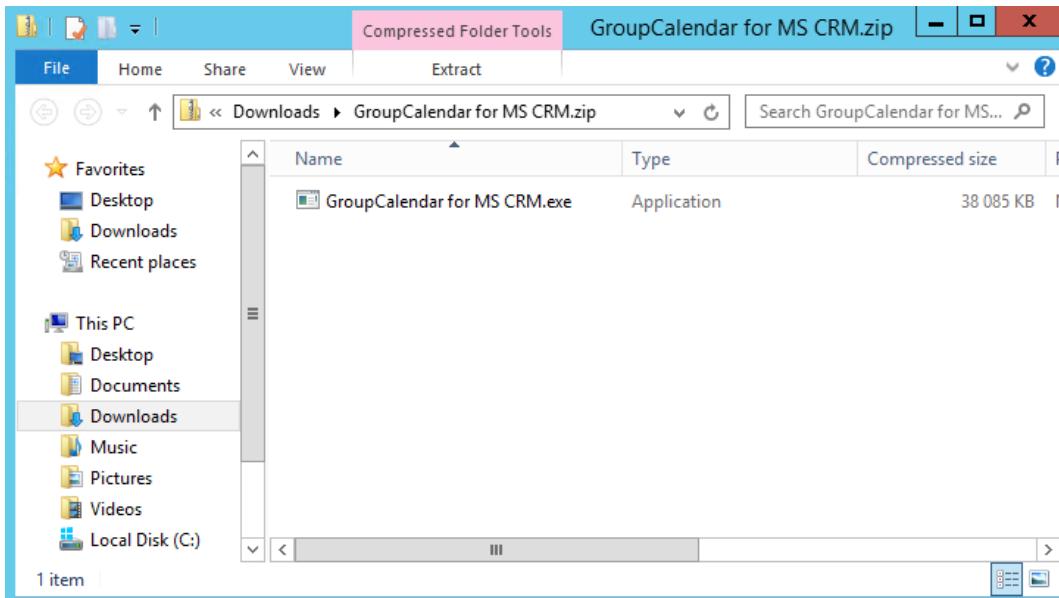


Figure 3: GroupCalendar for Microsoft CRM.exe

The file is the starting point for your installation if you use CRM ON PREMISE. Double click on it in order to start the installation process.

1.1.2 How to import GroupCalendar with the .msi-files (via .exe installer)

To start the installation process, simply double-click on GroupCalendar for MS CRM.exe in your downloaded files. This action opens the GroupCalendar installation wizard. Click on the **[Next]**-button in order to proceed.

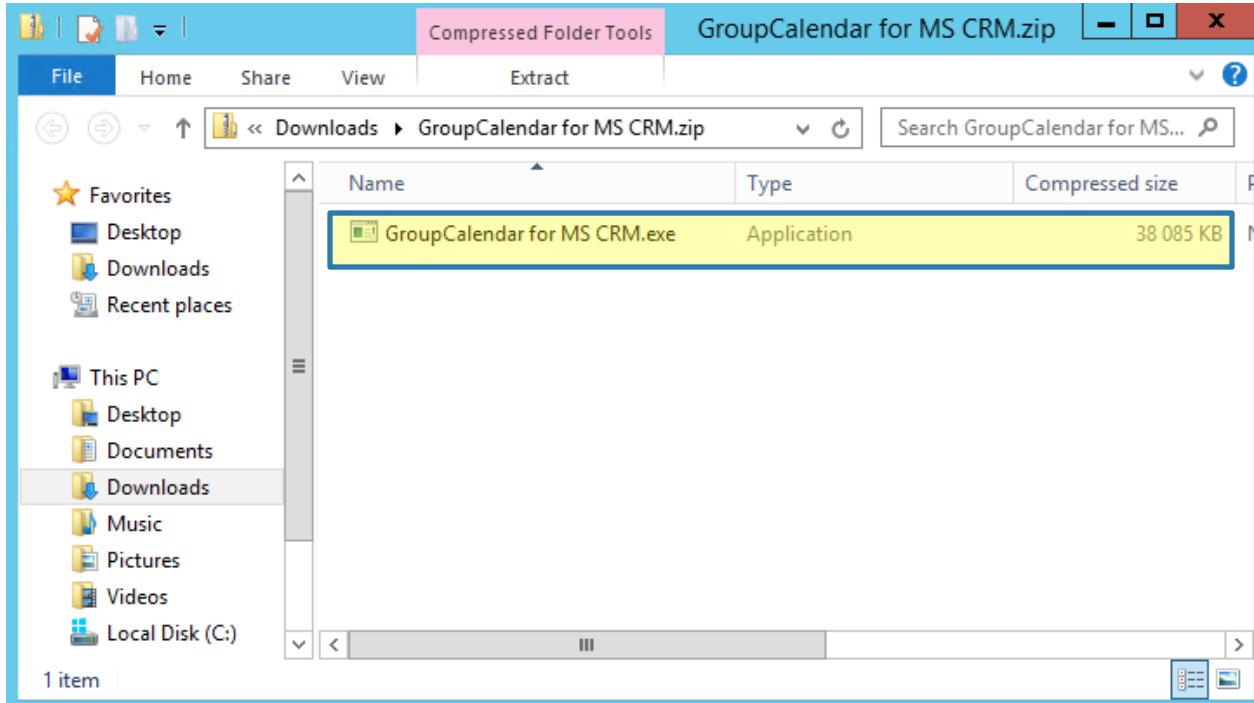


Figure 4: GroupCalendar – .exe Installer

Sometimes it can happen that the question box displayed in figure 4 appears. If so, simply click on the

[OK]-button in order to continue with the installation. The required restart can be done after the installation as well.

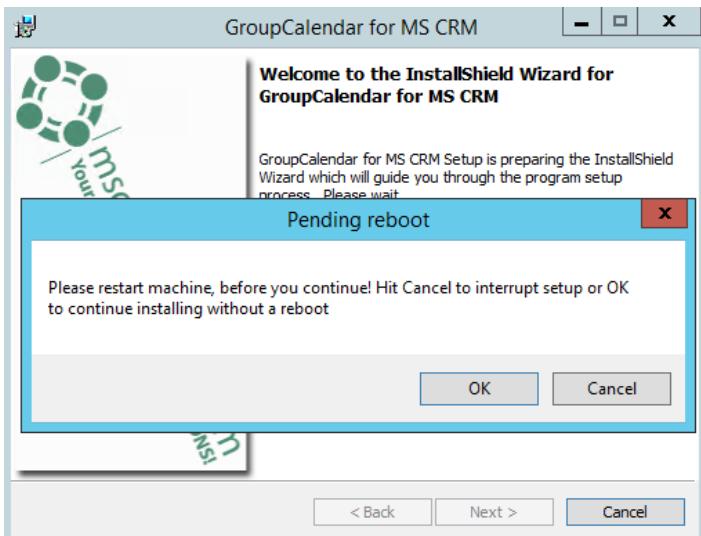


Figure 5: GroupCalendar – pending reboot

However, click on the **[Next>]**-button in order to proceed.

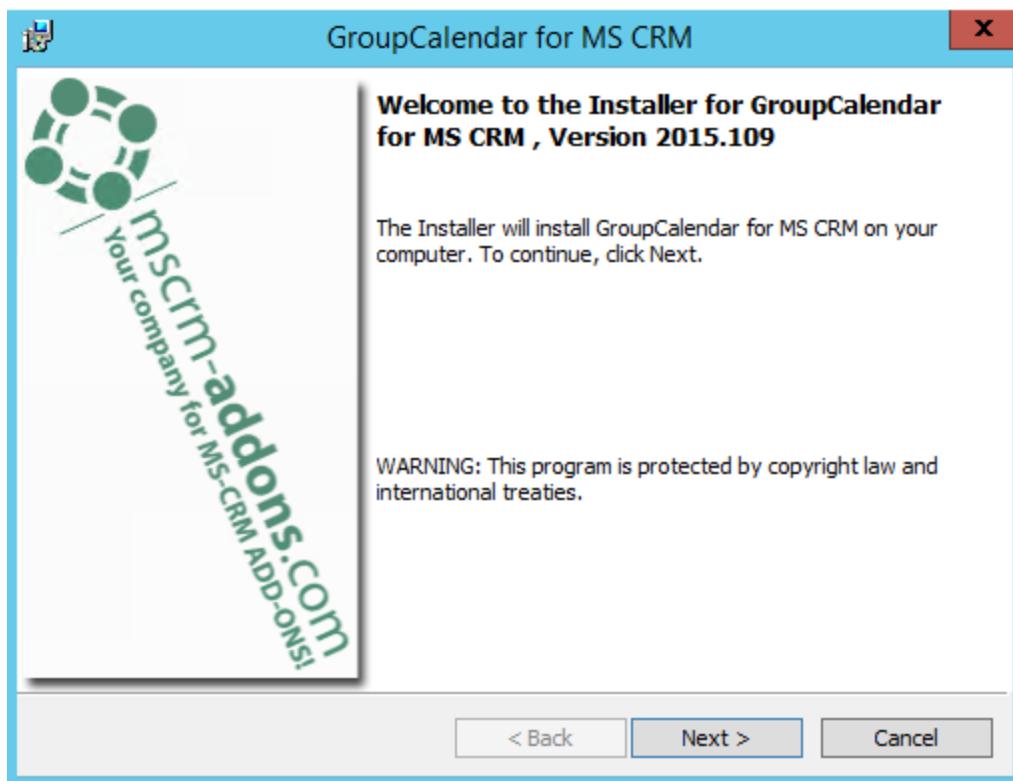


Figure 6: GroupCalendar – Installation wizard

Next, the EULA (End User License Agreement) opens. Read the license agreement carefully and accept its terms if you agree to them. If you do not accept the license agreement, you cannot continue with the installation. Using the **[Print]**-button, you can also print it. Click on the **[Next>]**-button to proceed.



Figure 7: GroupCalendar – EULA (End User License Agreement)

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365

If you want to, you could change the save location in the next window. Feel free to click on the **[Change...]**-button to use another save location for GroupCalendar. Click on the **[Next >]**-button to proceed.

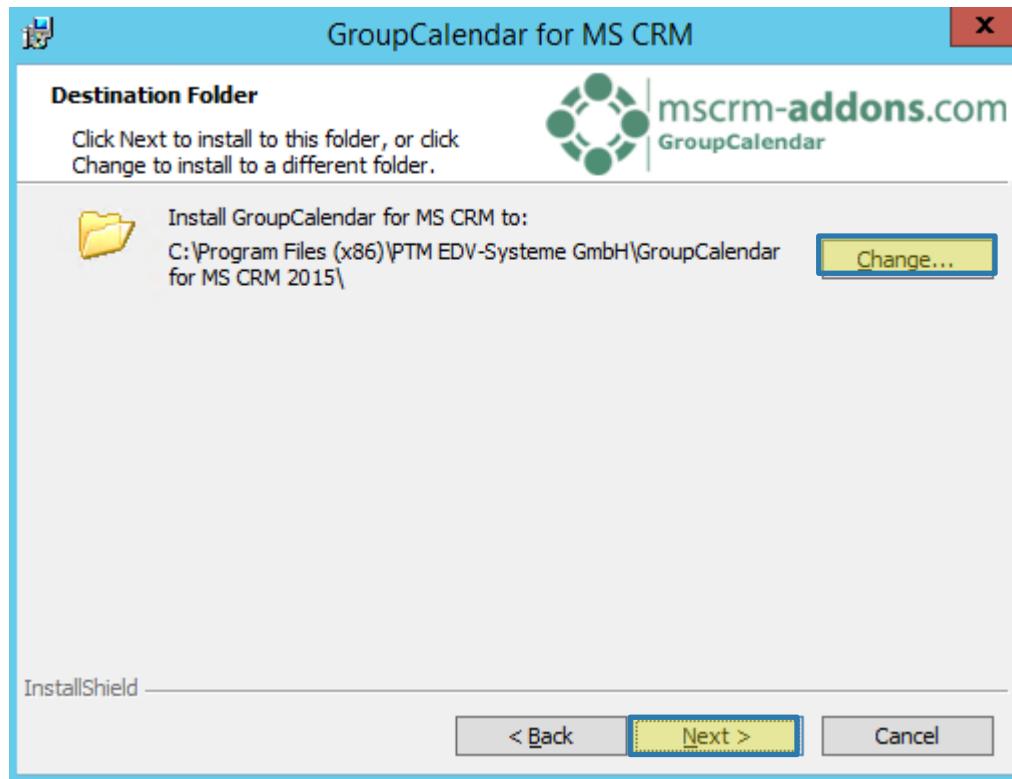


Figure 8: GroupCalendar – Installer: Save location

The installer is ready to install the program now. To do so, simply click on the **[Install]**-button.

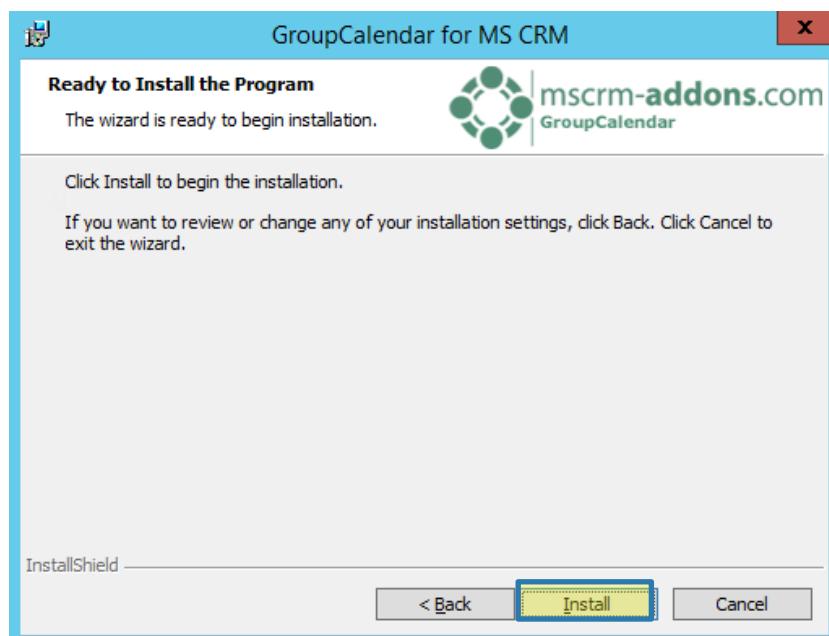


Figure 9: GroupCalendar – Installer ready to install

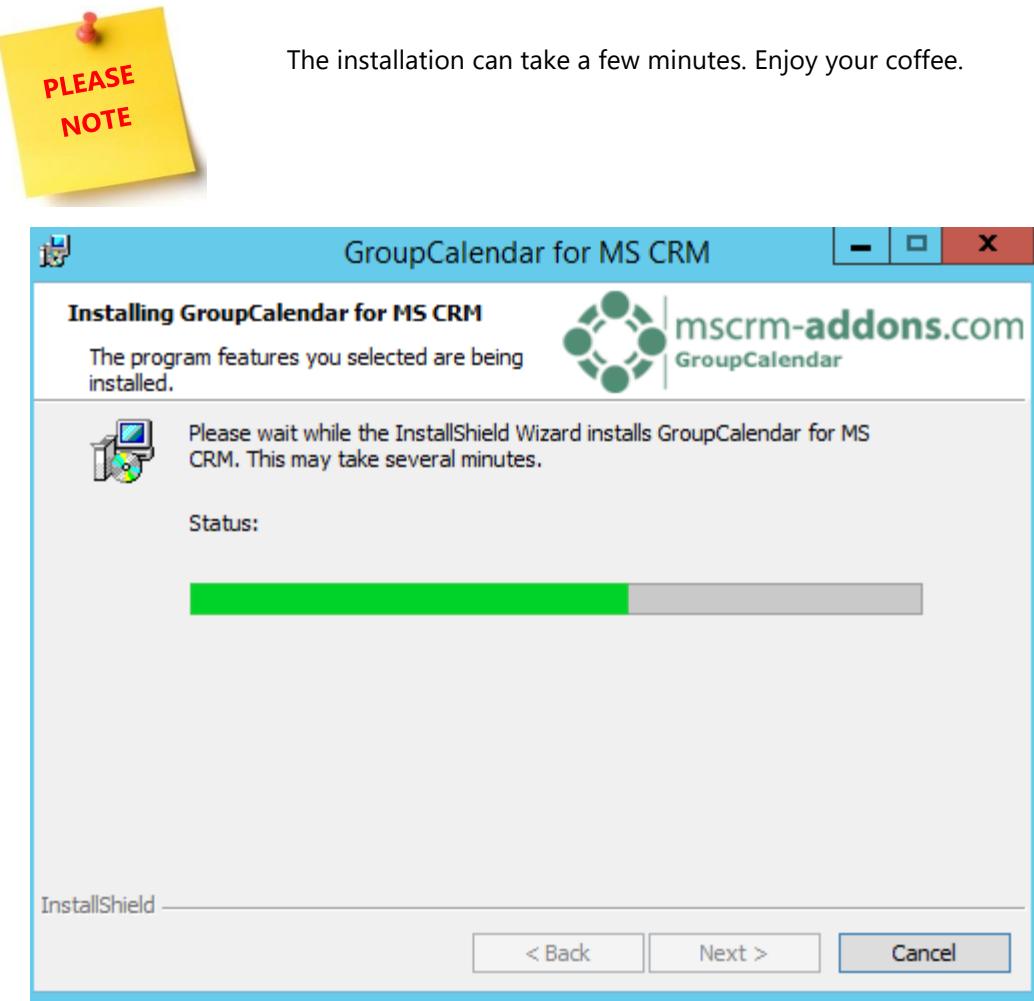


Figure 10: GroupCalendar – Installer: Install Shield Wizard

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365

GroupCalendar .msi installer requires a connection to Microsoft Dynamics CRM. To configure your server, select an existing profile or create a new profile in the *Connection Dialog*. Select your preferred server path and add your login credentials by filling in the field's username (1), password (3) and domain (2).

Press the [**Retrieve all organizations**]-button and select your organization. For further information on the connection dialog, please have a look at the corresponding documentation, which you can find here:

<http://www.msCRM-addons.com/Support/Documentation#LM>

Press the [**OK**]-button in order to proceed.

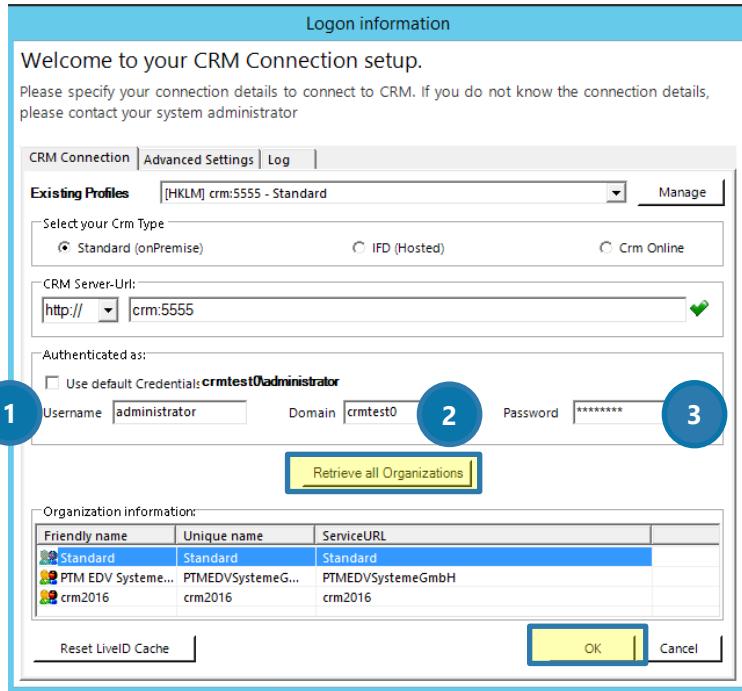


Figure 11: GroupCalendar – Connection Setup dialog

Next, you have to apply the general security role. The msCRM-addons general security role contains the basic requirements for using the product itself and to be able to perform the license check.



You can skip this step, but please note that skipping this step requires you to either manually assign the roles to all users.



Figure 12: GroupCalendar – security roles

Next, GroupCalendar will create a new website on your IIS 8. Please click on the **[OK]**-button in order to proceed.

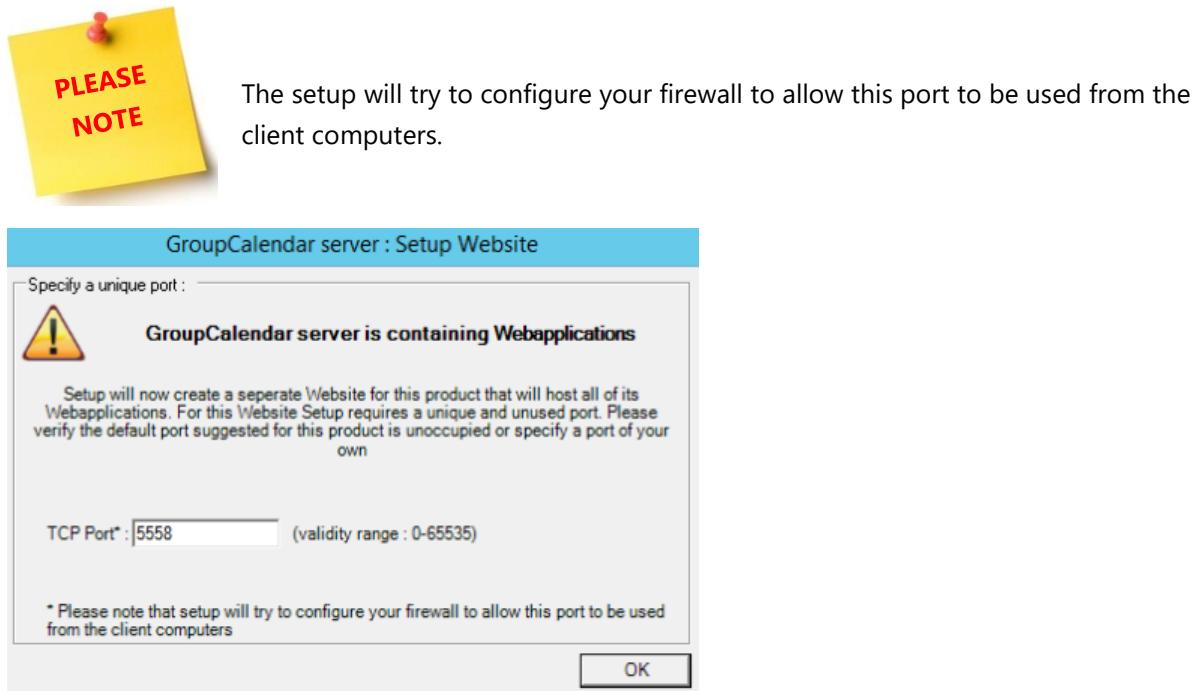


Figure 13: GroupCalendar – Setup Website

GroupCalendar will as well ask you to select a time format.

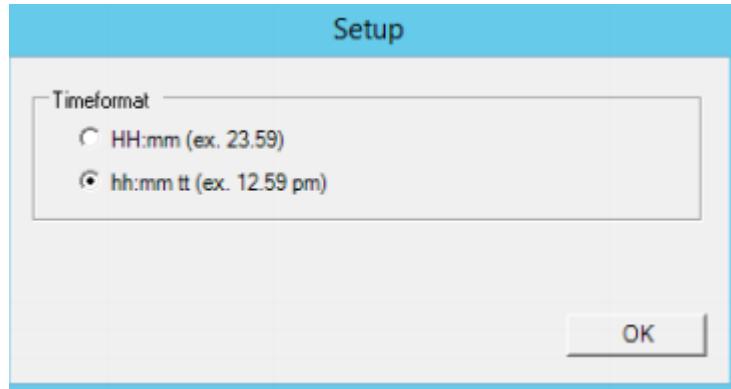


Figure 14: GroupCalendar – SetupTime

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365

If everything was set up correctly, the Installation Wizard appears again on the screen. Click on the **[Finish]**-button in order to finish the installation.

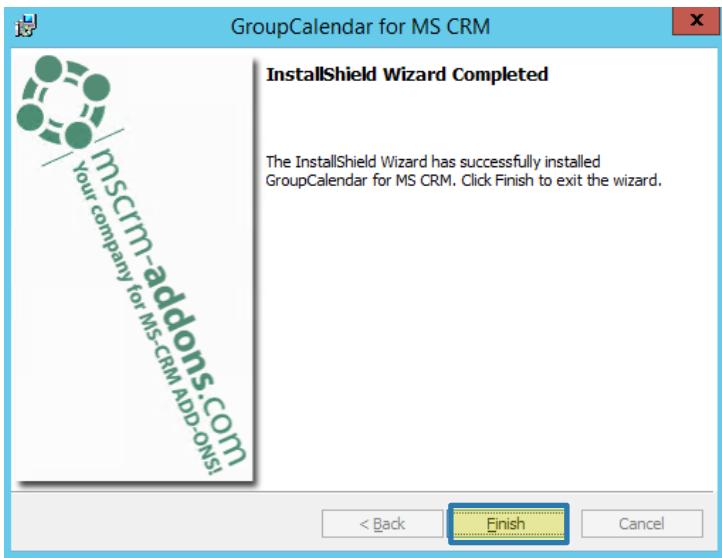


Figure 15: GroupCalendar – finish installation

The next window provides you with an organization overview. Again, the verification of the connection and the user rights can last a few minutes.

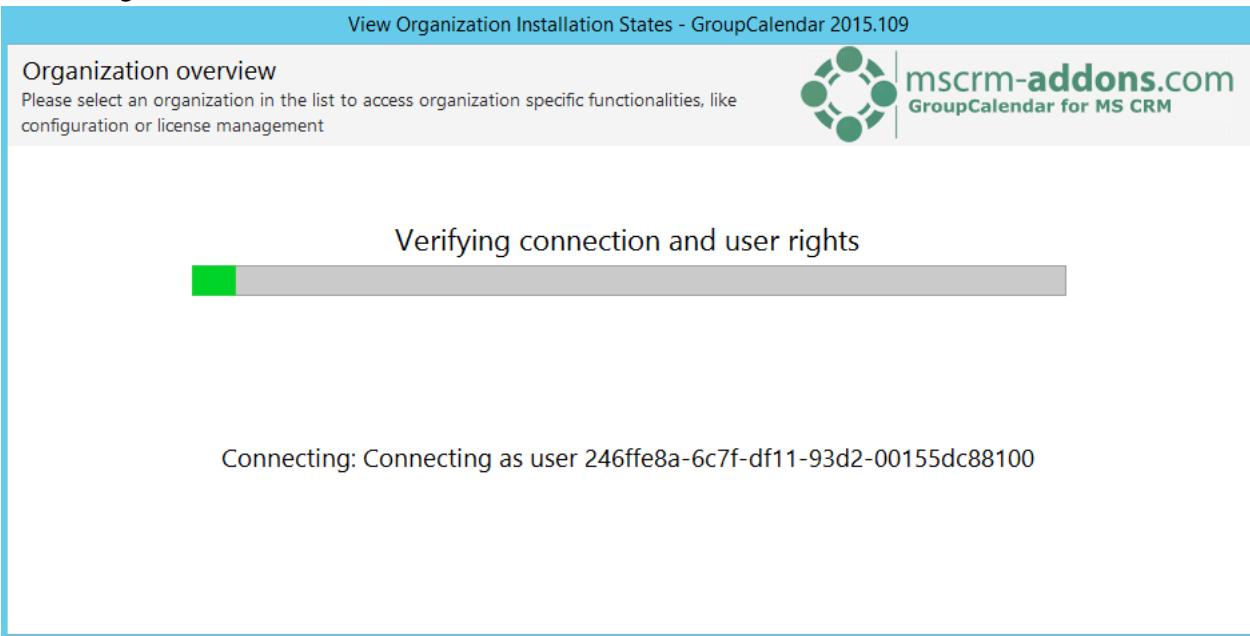


Figure 16: GroupCalendar – verifying connection and user rights

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365

As soon as the connection is verified, the Organization overview will open and provide you with an overview of your organization(s).

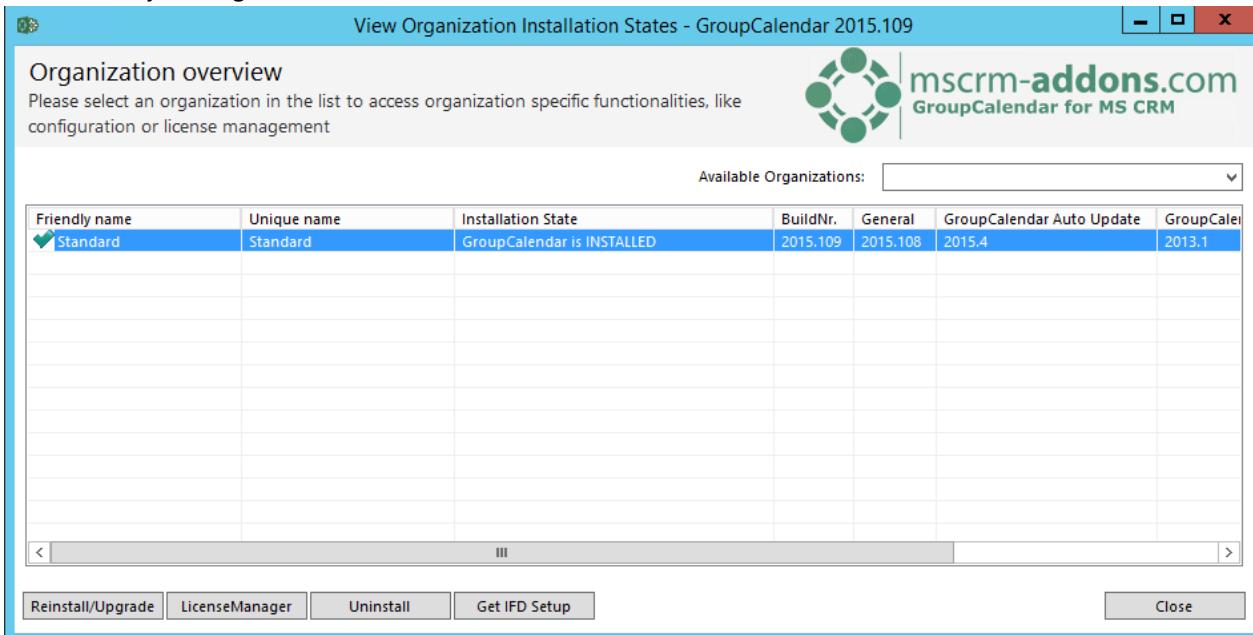


Figure 17: GroupCalendar – verifying connection and user rights

1.2 How to install GroupCalendar via AppSource (CRM Online only)

1.2.1 How to get started with AppSource

To open AppSource, navigate to <https://appsource.microsoft.com/en-us/>.

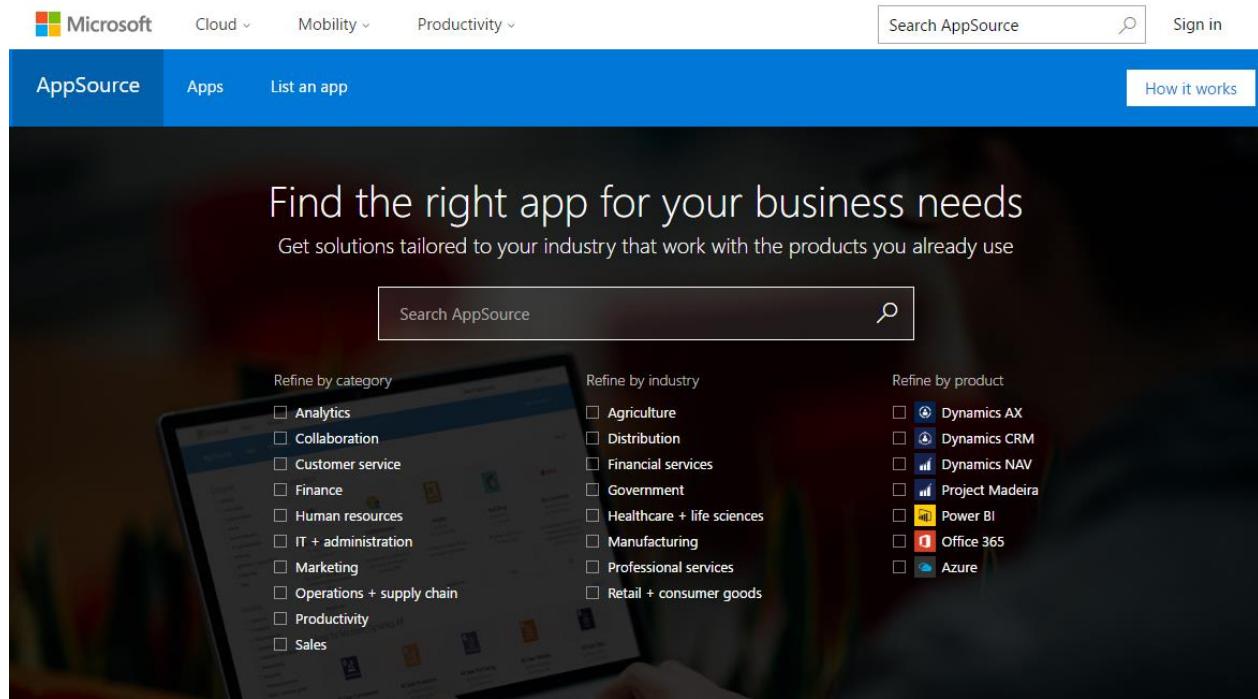


Figure 18: AppSource – find the right app

Next, please look for *GroupCalendar* in the Search field and click on the [Try]-button in the *Group Calendar* result box.

The screenshot shows the Microsoft AppSource search interface. At the top, there is a search bar with the text "GroupCalendar" and a magnifying glass icon. Below the search bar, there are three filtering sections: "Refine by category" (with options for "Analytics" and "Collaboration"), "Refine by industry" (with options for "Agriculture" and "Distribution"), and "Refine by product" (with options for "Dynamics AX" and "Dynamics CRM"). The main search results area is titled "Search Results for Apps (1)". It displays a single app card for "GroupCalendar". The card features a green icon with the number "8", the app name "GroupCalendar", the developer "By mscrm-addons.com", and the compatibility "For Dynamics CRM". A brief description follows: "Scheduling in CRM made easy: Get an overview of activities, teams and users in professional views". At the bottom of the card is a yellow "Try" button with a blue border. To the right of the card, there is a blue "All apps →" button.

Figure 19: AppSource – look for *GroupCalendar*

Next, agree to the Group Calendars terms and conditions and click on the [**Continue**]-button.

This screenshot shows the "One more thing ..." step in the AppSource process. It displays the "GroupCalendar" app card again. Below the card is a terms and conditions agreement section. It includes a checked checkbox next to the text: "I agree to the provider's [terms of use](#) and understand that the rights to use this product do not come from Microsoft. Also, I give Microsoft permission to share my supplied contact information so that the provider can contact me regarding this product and related products. [Additional Microsoft terms](#)". At the bottom of the screen is a teal "Continue" button.

Figure 20: AppSource – Agree to Terms and Conditions

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365

You will be asked to sign in to Microsoft AppSource.

Sign into Microsoft AppSource

Use your work account

admin@MSP843023.onmicrosoft.com

Sign in

Don't have an account? [Sign up](#)

Figure 21: AppSource – Sign in

Once logged in, please add the application by agreeing to the terms and conditions and clicking on the **[I Agree]-button** if you want to proceed.

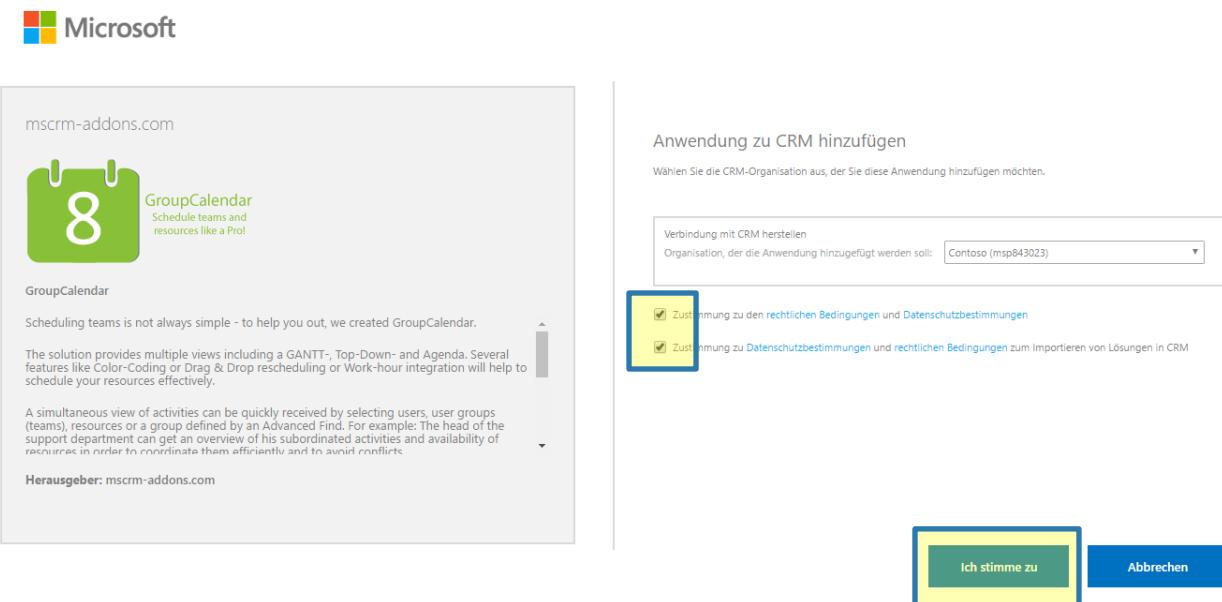


Figure 22: AppSource – Add GroupCalendar Application

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365

You are redirected to the CRM Online Administration panel. Here, you get an overview of all your installations.

LÖSUNGSNAME	VERSION	VERFÜGBAR BIS	STATUS
Company News Timeline	1.0.0.0	31.12.2050	Nicht installiert
FantasySalesTeam	1.4.6	01.01.2050	Nicht installiert
Insights for Microsoft Dynamics CR...	4.0	15.08.2019	Nicht installiert
mscrm-addons.com GroupCalendar	2016.2	01.01.2021	Installation steht aus.
Office 365 Groups	2.5.0.1	01.01.2050	Nicht installiert
Voice of the Customer	8.2.547.1	01.01.2050	Nicht installiert

Company News Tim...

[INSTALLIEREN](#)

You can now view news related to an Account, Lead, Contact or Opportunity in the CRM app on your mobile device. The Company news timeline solution for mobile enables sales and service users to view ... ([mehr](#))

Erstellt von: Microsoft [Weitere Informationen](#)

Figure 23: AppSource – Administration panel



Because the CRM Online Administration panel does not refresh itself automatically, you have to refresh the window from time to time.

LÖSUNGSNAME	VERSION	VERFÜGBAR BIS	STATUS
Company News Timeline	1.0.0.0	12/31/2050	Not installed
FantasySalesTeam	1.4.6	1/1/2050	Not installed
Insights for Microsoft Dyn...	4.0	8/15/2019	Not installed
mscrm-addons.com Grou...	2016.2	1/1/2021	Installed
Office 365 Groups	2.5.0.1	1/1/2050	Not installed
Voice of the Customer	8.2.547.1	1/1/2050	Not installed

Company News Tim...

[INSTALLIEREN](#)

You can now view news related to an Account, Lead, Contact or Opportunity in the CRM app on your mobile device. The Company news timeline solution for mobile enables sales and service users to view the latest and most important news in the mobile client from Bing news. The news articles are organized by time (Today, This Week, Last Week) and contain the headline, date/time, and source of the news article. Important events are detected and categorized (including Management Changes, Earnings Releases, New Offerings, Cost Cutting, Growth, Legal Issues, Acquisitions and Partnerships). ([less](#))

Erstellt von: Microsoft [Weitere Informationen](#)

Figure 24: AppSource – GroupCalendar installed

However, as soon as GroupCalendar is installed, its status will be changed to *Installed*.

1.2.2 Post installation steps (CRM Online only)

Once you have installed GC Online successfully, you have to activate it, which means that you have to register your license.

To do so, open CRM Online and click on *Workplace > MyWork > GroupCalendar*. The so opened window provides you with the information required to activate GroupCalendar.

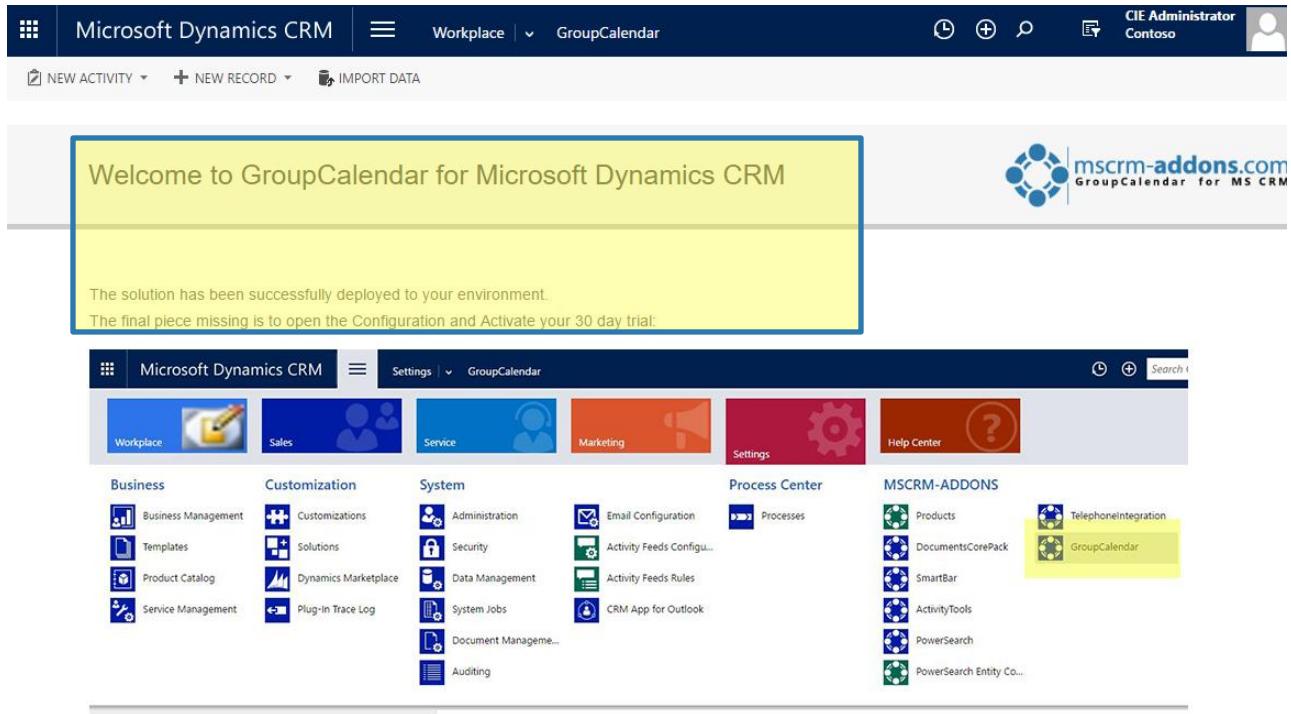


Figure 25: Open GroupCalendar

Please follow the steps displayed in Figure 25 (Open the CRM Settings > MSCRM-ADDONS > GroupCalendar). Afterwards, you are provided with the *GroupCalendar Getting Started* surface. Please scroll down to the *GroupCalendar Trial Request*-section and enter your credentials there.

GroupCalendar Trial Request

To activate the 30 day trial we will need to connect our GroupCalendar webrole from Azure to your CRM environment. This user can be set to non-interactive (so it doesn't count for CRM licensing) and needs to be assigned to the "**MSCRMAddonsAzureService**"-security role only.

In order to proceed you will need to login with your existing user or register with mscrm-addons.com.

Login

Username:

Password:

Login

[Forgot your password?](#)

Or Register

Username: Company Name:

Password: Street:

Repeat Password: City:

First Name: Country:

Last Name: Postal Code:

Email Address:

Telephone:

Register

Figure 26: GroupCalendar trial request

As soon as you have finished, click on the **[Register]**-button and you will be registered on our website.

After the login, you can require your 30-days trial version. Please make sure that you have all the necessary roles.

As for the roles: it is of upmost importance that you possess the following roles:

- mscrm-addons general security role
- MSCRMAddonsAzureService
- MSCRM-ADDONS.com GCAutoUpdate

Additionally, you could also change the CRM access role in the office 365 portal. (this is optional).

To do so, simply click on *roles* and change the settings.

Swap Neel

The screenshot shows the 'Assign role' section of the Office 365 user settings. On the left, there's a sidebar with options: details, roles (which is selected and highlighted in red), settings, licenses, email address, and more. The main area has a heading 'Assign role' with the sub-instruction 'Choose the admin role that you want to assign to this user and save changes Learn more'. Below this are three radio button options: 'No admin access' (selected), 'Global admin' (disabled), and 'Limited admin access' (disabled). Each option has a brief description below it.

Figure 27: Change the CRM access role in the office 365 portal

If you have decided to change the roles, you must also change the user settings.

Swap Neel

The screenshot shows the 'Set sign-in status' section of the Office 365 user settings. On the left, there's a sidebar with options: details, roles, settings (which is selected and highlighted in red), licenses, email address, and more. The main area has a heading 'Set sign-in status' with a note: '* Alternate email address If you forget your password, we will use this email to help you reset it'. A text input field contains the email 'v-9bero@microsoft.com'. Below this is another section with two radio button options: 'Allowed' (selected) and 'Blocked'. Each option has a brief description below it.

Figure 28: Set sign-in status to 'allowed' in office 365



We cannot stretch the importance of the roles to less. So please - make sure that the user possesses the following roles:

- mscrm-addons general security role
- MSCRMAddonsAzureService
- MSCRM-ADDONS.com GCAutoUpdate

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365

Please open the GroupCalendar Service User (*Settings > Administration > Users*) and set the MSCRMAddons service user to *non-interactive access mode* (to do so, please follow [this blog article](#)).

If the user is still counted by CRM dynamics licensing after being set to non-interactive, simply remove the CRM license from this user in the Office 365 Portal.

Now once again, open GroupCalendar in CRM (*Workplace > My Work*) and verify that everything works fine.

Enjoy GroupCalendar for CRM Online experience!

2 How to uninstall GroupCalendar

Because GroupCalendar can be installed in Microsoft Dynamics CRM on premise or online, there are also two different ways to uninstall our add-on:

Uninstall GC (ON PREMISE) ([SEE CHAPTER 2.1 HOW TO UNINSTALL GC \(ON PREMISE\), PAGE 24](#))

Uninstall GC (CRM ONLINE) ([SEE CHAPTER 2.2 HOW TO UNINSTALL GC \(CRM ONLINE\), PAGE 25](#))

2.1 How to uninstall GC (ON PREMISE)

To uninstall GroupCalendar, open *Programs and Features* in the Start Penal.

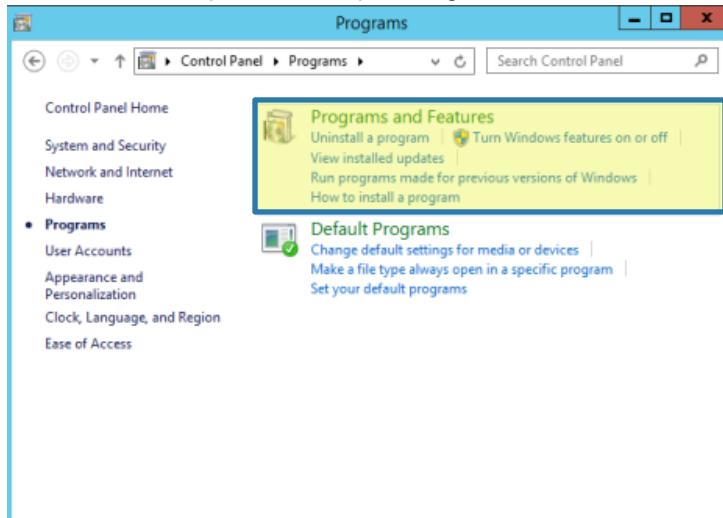


Figure 29: Programs and Features

Look for *GroupCalendar for MS CRM*, select it and click on uninstall. (A double-click on *GroupCalendar for MSCRM* will do as well).

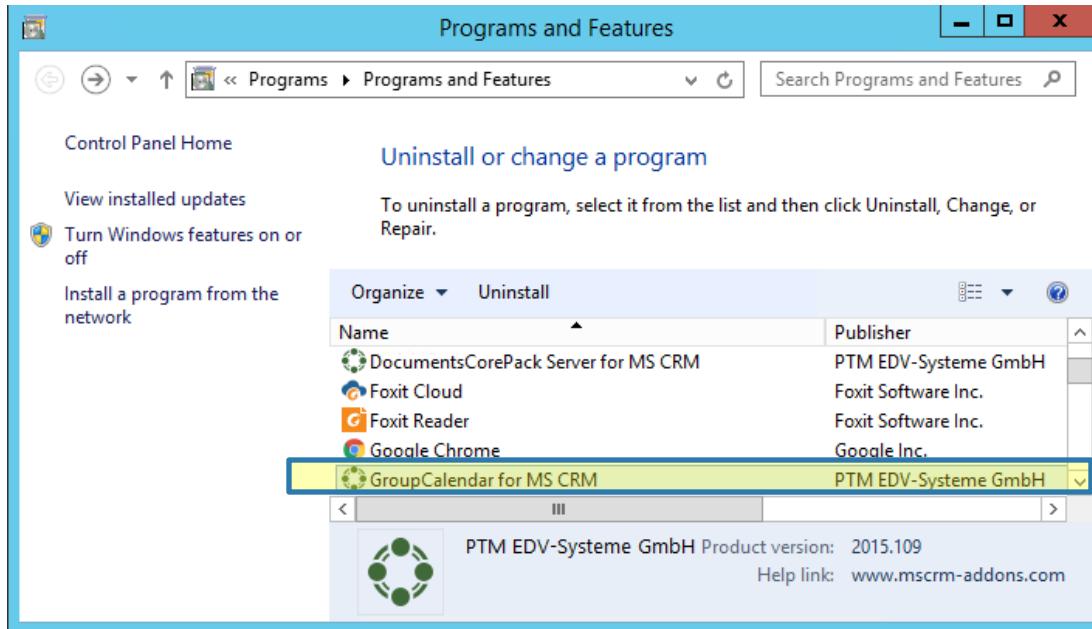


Figure 30: Programs and Features – Uninstall GroupCalendar for MSCRM

You will be asked if you really want to uninstall GroupCalendar. Confirm with a click on the **[YES]**-button. It may take a few minutes to uninstall GroupCalendar.

2.2 How to uninstall GC (CRM ONLINE)

If you are using CRM Online, the following step-by-step instruction will support you when it comes to uninstall GroupCalendar.



When you uninstall GroupCalendar like this, all related data will be deleted.

First of all, open the CRM solutions and look for the GroupCalendar solutions.

(CRM > Settings > Solutions)

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there's a dark blue header with the text "Microsoft Dynamics CRM" on the left, and "Settings | Solutions" on the right. Below the header, there are several navigation links: "RIBBON WORKBENCH", "POWERSEARCH", "SMARTBAR DIALOG", and another "POWERSEARCH". The main content area is titled "All Solutions" with a dropdown arrow. Below the title is a toolbar with various icons. The main table lists solutions, with three specific ones highlighted by a blue border: "GroupCalendarAutoUpdate", "GroupCalendarServerConfig", and "GroupCalendarServerCore".

Name	Display Name	Version
DocumentsCorePackServerCore	MSCRM-ADDONS.com Do...	2015.4
DocumentsCorePackServerJavaScript	MSCRM-ADDONS.com Do...	2.0
GlobalMscrmAddonsTab	GlobalMscrmAddonsTab	1.0
GroupCalendarAutoUpdate	MSCRM-ADDONS.com Gr...	2015.4
GroupCalendarServerConfig	MSCRM-ADDONS.com Gr...	2013.1
GroupCalendarServerCore	MSCRM-ADDONS.com Gr...	2015.5
jQueryImageViewer	jQueryImageViewer	1.0.0.0

Figure 31: Programs and Features



The solutions MUST be deleted in the order below listed!

Please uninstall the solutions in the following order:

- ① GROUPCALENDARAUToupdate.zip
- ② GROUPCALENDARServerWorkflow.zip (IF PRESENT)
- ③ GROUPCALENDARServerConfig.zip
- ④ GROUPCALENDARServerCore.zip

You will notice that there is also the *MSCRMADDONScomGeneral* solution listed.



Do NOT uninstall this solution as long as you have one of our addons installed.

That's it!

3 How to access GroupCalendar

No matter if you use CRM online or on premise, to access Group Calendar, simply open your CRM and navigate to Workplace > GroupCalendar. Click on GroupCalendar in order to access GroupCalendar.



Figure 32: Programs and Features

3.1 How to test GroupCalendar

To test GroupCalendar, simply open your Browser and insert:

[http://SERVER:PORT/ORGANIZATION/Webresources\(ptm_WebApplicationPreloaderGroupCalenar](http://SERVER:PORT/ORGANIZATION/Webresources(ptm_WebApplicationPreloaderGroupCalenar)

Please insert your CRM Server, Port and Organization instead of the items written in capital letters.

4 GroupCalendar settings

The configuration of GroupCalendar is a quite easy one. The starting point of every configuration are the group calendar settings.

4.1 How to open the GroupCalendar settings?

First of all, open the CRM Settings and click on *Mscrm-Addons.com Products*.

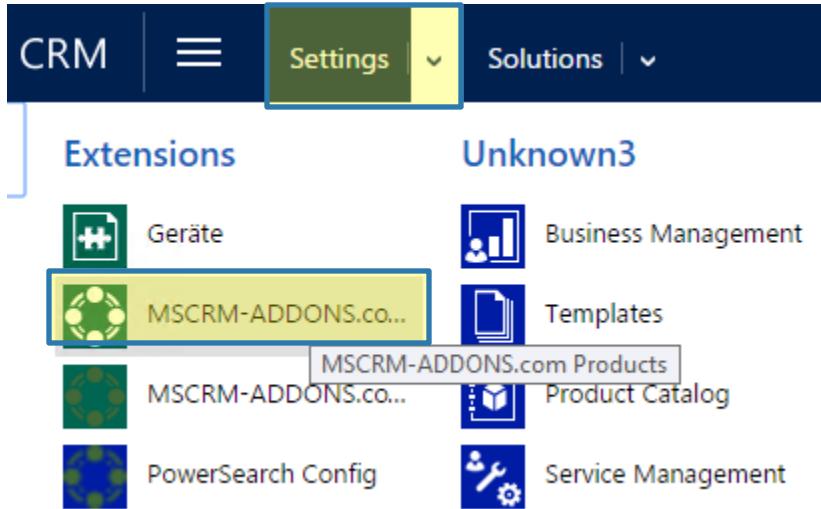


Figure 33: GC settings – MSCRM-ADDONS.com Products

Now you are provided with an overview of all products installed. Please click on *GroupCalendar* in order to open the settings.

Name	Product Type	Created By	Created On
_DocumentsCorePack	server	Michael Dohr	20.Apr.16 15:59
_DocumentsCorePack	server	Michael Dohr	26.Apr.16 11:41
_DocumentsCorePack	server	Michael Dohr	27.Apr.16 08:43
ActivityTools	server	Michael Dohr	16.Mär.11 08:17
AttachmentExtractor	server	Michael Dohr	29.Jun.12 12:07
AutoMerge	server	Michael Dohr	04.Dez.14 10:36
DocumentsCorePack	Server	Michael Dohr	06.Apr.11 10:59
GroupCalendar	server	Michael Dohr	04.Aug.14 11:20
Plugin	GroupCalendar	server	Michael Dohr
			15.Mär.11 13:07

Figure 34: Active MSCRM-ADDONS.com Products

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365

In the so opened window, you find an overview of all the active settingskeys.

MSCRM-ADDONS.COM PRODUCTS : INFORMATION

GroupCalendar

[General](#)

Name *	GroupCalendar	Subscription Number	--
Product Type	server	Scheduler	--

Active MSCRM-ADDONS.com Settingskeys...

Name ↑	KeyValue	IsCached	Created On
AddGanttAttrappointment1	location	Yes	14.Mär.15 19:03
AddGanttAttrappointment2	requiredattendees	Yes	14.Mär.15 19:03
AddGanttAttrDescapointment1	Location	Yes	14.Mär.15 19:04
AddGanttDescapointment2	Required	Yes	14.Mär.15 19:04
AllowExport	true	Yes	04.Aug.14 11:20
AppointmentColorCode	1 #FFDAB9;2 #FFFF00;3 #FF8C00;4 #00FF00;5 #ADFF2F...	Yes	04.Aug.14 11:20
cbxactstart	true	Yes	04.Aug.14 11:20
cbxappointment	true	Yes	04.Aug.14 11:20
cbxattendees	true	Yes	04.Aug.14 11:20
cbxemail	false	Yes	04.Aug.14 11:20
cbxfax	false	Yes	04.Aug.14 11:20
cbxletter	false	Yes	04.Aug.14 11:20
cbxonlyattendees	false	Yes	04.Aug.14 11:20

Figure 35: Active MSCRM-ADDONS.com Products

Supported by the different settingskeys, the customization of GroupCalendar is very easy. Depending on what you would like to customize, you must simply create a certain settingskey. If you have not created a new settingskey yet, please have a look at [this article](#).

Please find an overview of all settingskeys and their meaning in the next chapter.

4.2 GroupCalendar settingskeys overview

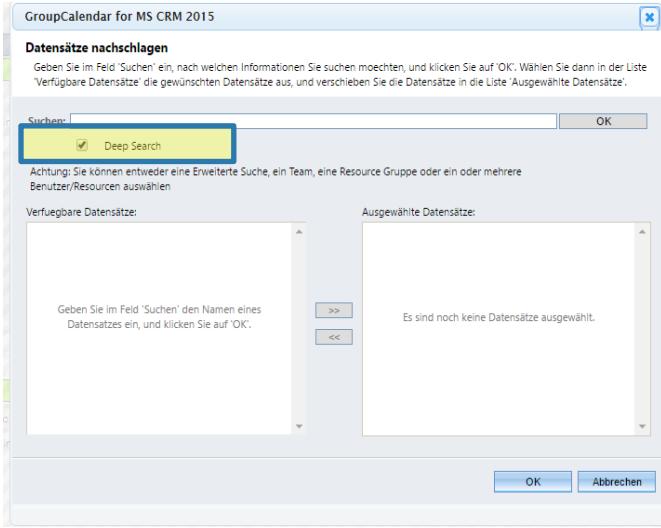
Below, we provide you with an overview of most of the default GroupCalendar settingskeys.



The settingskeys are updated regularly, but it is possible that a certain settingskey that has been added recently, is part of the default settingskeys but not part of this particular list.

KEY	DESCRIPTION
Language	<p>Per default, the CRM User language is used. But when this language does not exist in GC, the language configured here is used.</p> <p>Each label in GroupCalendar can be customized. So it is quite easy to add new languages, as long as you have basic understanding of XML.</p> <p>To add a new language, go to the subdirectory <i>App_Data\localization</i>. There, you will be provided with en.xml, de.xml,...-files. Simply copy the en.xml file save as xy.xml. (xy is a placeholder for the new language). Change the entries in the xy.xml file and after that change the language value in the settings entity to xy.</p> <p>Examples for language codes: en ... English de ... German fr ... French</p>
TimeFormat	HH:mm ... 24Hour-Format (ex. 23:59) hh:mm tt ... 12Hour-Format (ex. 12:59pm)
CalendarWeekRule	<p>Specifies the rule how the week number should be calculated</p> <p>Possible Values:</p> <ul style="list-style-type: none"> - FirstDay - FirstFourDayWeek - FirstFullWeek

KEY	DESCRIPTION
ignoreStartDateTask ignoreStartDateLetter ignoreStartDateFax ignoreStartDateEmail ignoreStartDatePhonecall	The fields define, if the activity is shown - on the due date only (minus duration) - or shown from start 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
Cbxattendees	Show default value for <i>Show Attendees</i>
Cbxserviceactivity	Default-value for the checkbox SERVICE ACTIVITY
cbxTDDataOnly	Default value for the TopDown Only Appointments checkbox
DoNotShowWebCombo	Disable the WebCombo for the users, teams and advanced finds. This makes sense when you have a really large number of users and teams, which can slow down GC drastically. Instead, you can select users/teams via the advanced user select dialog.
hourSections	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 scrolls when you open GC. Possible Values: 1 - 24

KEY	DESCRIPTION
deepSearch	<p>Default value for the following checkbox:</p>  <p>The screenshot shows a Windows-style dialog box titled 'GroupCalendar for MS CRM 2015'. The main title is 'Datensätze nachschlagen'. Below it, there's a note: 'Geben Sie im Feld 'Suchen' ein, nach welchen Informationen Sie suchen möchten, und klicken Sie auf 'OK'. Wählen Sie dann in der Liste 'Verfügbare Datensätze' die gewünschten Datensätze aus, und verschieben Sie die Datensätze in die Liste 'Ausgewählte Datensätze'.' A search input field labeled 'Suchen:' contains the text 'Deep Search' with a checked checkbox. Below the search field is a note: 'Achtung: Sie können entweder eine Erweiterte Suche, ein Team, eine Resource Gruppe oder ein oder mehrere Benutzer/Resourcen auswählen'. Two scrollable lists are present: 'Verfügbare Datensätze' on the left and 'Ausgewählte Datensätze' on the right. Between them are two buttons: '>>' and '<<'. At the bottom right are 'OK' and 'Abbrechen' buttons.</p>
AppointmentColorCode	Default value for Color Coding. For further information on Color Coding, please have a look at CHAPTER 6 COLOR-CODING FUNCTIONALITY FOR ALL ACTIVITIES ON PAGE 42 .
EmailColorCode	Default value for Color Coding.
FaxColorCode	Default value for Color Coding.
LetterColorCode	Default value for Color Coding.
PhoneCallColorCode	Default value for Color Coding.
recurringFieldCopyAppointment recurringFieldCopyPhonecall recurringFieldCopyServiceAppointment recurringFieldCopyTask	Define which fields are copied when a copy activity is running
ServiceAppointmentColorCode	Default value for Color Coding.
Unscheduled_UpdateAttribute_appointment	DO NOT CHANGE THIS KEY UNLESS YOU ARE ASKED TO DO SO.
Unscheduled_UpdateAttribute_serviceappointment	DO NOT CHANGE THIS KEY UNLESS YOU ARE ASKED TO DO SO.
UnscheduledFetch_appointment	For further information, please have a look at this blog article .
UnscheduledFetch_serviceappointment	For further information, please have a look at this blog article .
GanttUnscheduledView_appointment	View for unscheduled appointments
GanttUnscheduledView_serviceappointment	View for unscheduled service activities
LicensekeyV.... (e.g.: LicenskeyV2011)	The license

5 How to install GroupCalendar in an IFD/Claims-based-Environment

To install GC in an IFD/Claims-based-Environment, you need a few prerequisites.

5.1 Prerequisites

The following downloads must be present if you want to setup the add-on successfully:

1. THE IFD-TOOL (WHICH YOU CAN GET [here](#))
2. AND THE LATEST VERSION OF GROUP CALENDAR (WHICH CAN BE DOWNLOADED [here](#)).

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

More details on MS CRM and IFD/Claims can be found [here](#).

The following system configuration is the base for our guide. Your setup will differ in these URLs, so please make sure to replace the URLs with your own URLs when you follow the guide:

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

ADFS Server:

<https://win2008domain.ptm-edv.at>

The add-on itself also requires a DNS name:

<https://groupcalendarserver.rc1ifd.ptm-edv.at/>

5.2 Basic configuration of GroupCalendar I (CRM part)

The following two step-by-step tutorials are intended to guide you through the installation of GC in an IFD/Claims-based-Environment.

Step 1:

Install GroupCalendar on the CRM server.

Step 2:

You will be asked to insert your logon information. Fill in the internal IFD name of your CRM.

In our case it is internalcrm.rc1ifd.ptm-edv.at. (ich glaub da muss der externe url konfiguriert werden. Am besten mitn Christoph oder alex(m) noch mal abklären) (For further information, please see [CHAPTER 5.1 PREREQUISITES, ON PAGE 33](#)). Then select the organization on which you want to install GC and click on the **[OK]-button**. For further information on the Connection dialog, have a look at our [Connection Dialog documentation](#).

Step 3:

Open the IIS (inetmgr.exe) as soon as the installation has been finished. Then, go to Sites > GroupCalendar WebSite. Right click the GroupCalendarsserver – WebSite and select *Edit Bindings....*

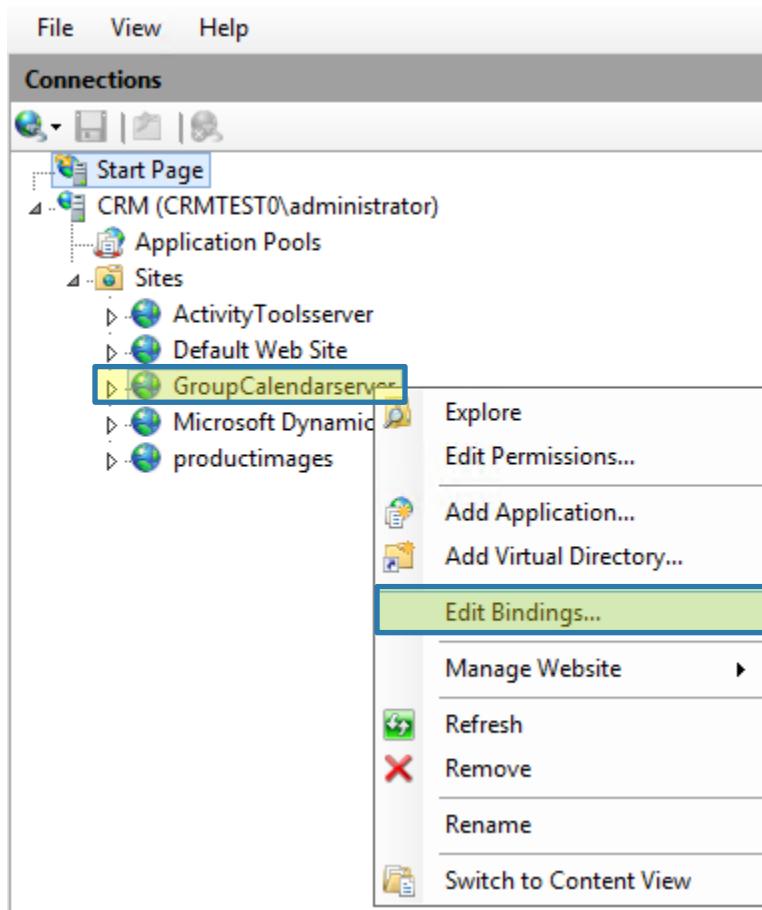


Figure 37: IIS (inetmgr.exe – Edit bindings

Step 4:

In the so opened Site Bindings, click on the **[Add]**-button and select the type *https* in the Add Site Binding. Do not forget to specify the port (e.g. 4446). Now the website is available for *https*. Click on the **[OK]**-button.

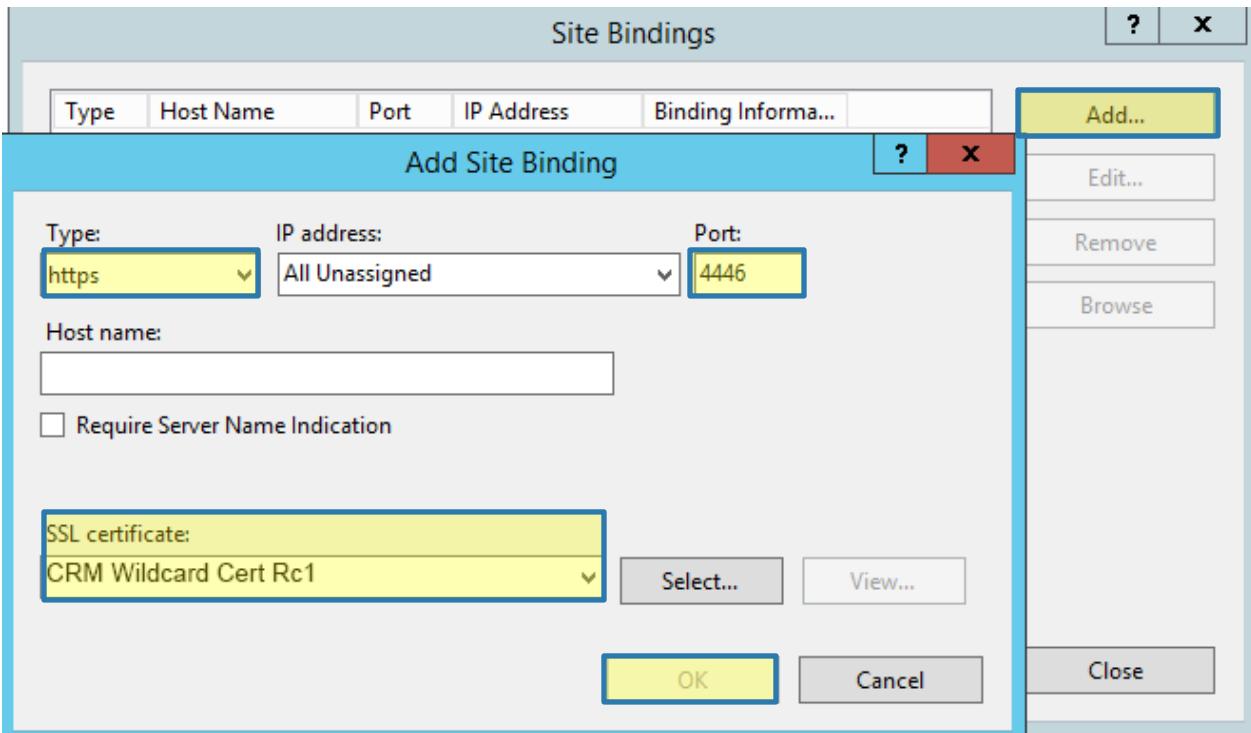


Figure 38: Add Site binding

Step 5:

Select the add-on's website once again and double-click on the *Authentication* item on the right side. Make sure that the *Anonymous* and *ASP.Net Impersonation* settings are enabled.

Step 6:

The add-on URL must be added to your DNS Server, because your DNS-Server has to resolve the *groupcalendarserver.[yourdomain]* correctly. This means. that it should be resolved with your CRM Server's IP address. If you use an external DNS, make sure that both, the external and the internal DNS, are capable to resolve the URL.

Step 7:

Extract the *IFD-Tool* (.zip-file) and execute the *IFDSetup Wizard.exe*. Follow the steps carefully.

Step 8:

Open your CRM in your browser and open *Settings > MSCRM-ADDONS.COM products*.

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there are four main navigation tabs: Sales (blue), Marketing (orange), Service (blue), and Settings (red). The Settings tab is currently selected. Below these are three sub-sections: Extensions, Unknown1, and Unknown2. The Extensions section contains several items, one of which is highlighted with a yellow box: 'MSCRM-ADDONS.co...' (with 'Products' partially visible). Other items in this section include 'Geräte', 'Business Management', 'Templates', and 'Product Catalog'. The Unknown1 and Unknown2 sections contain 'Administration', 'Data Management', 'System Jobs', 'Email Configuration', 'Activity Feeds Configu...', and 'Activity Feeds Rules' respectively.

Figure 39: *Settings > MSCRM-ADDONS.COM Products*

Step 9:

Click on *GroupCalendar* within the *MSCRM-ADDONS.COM Products* window.

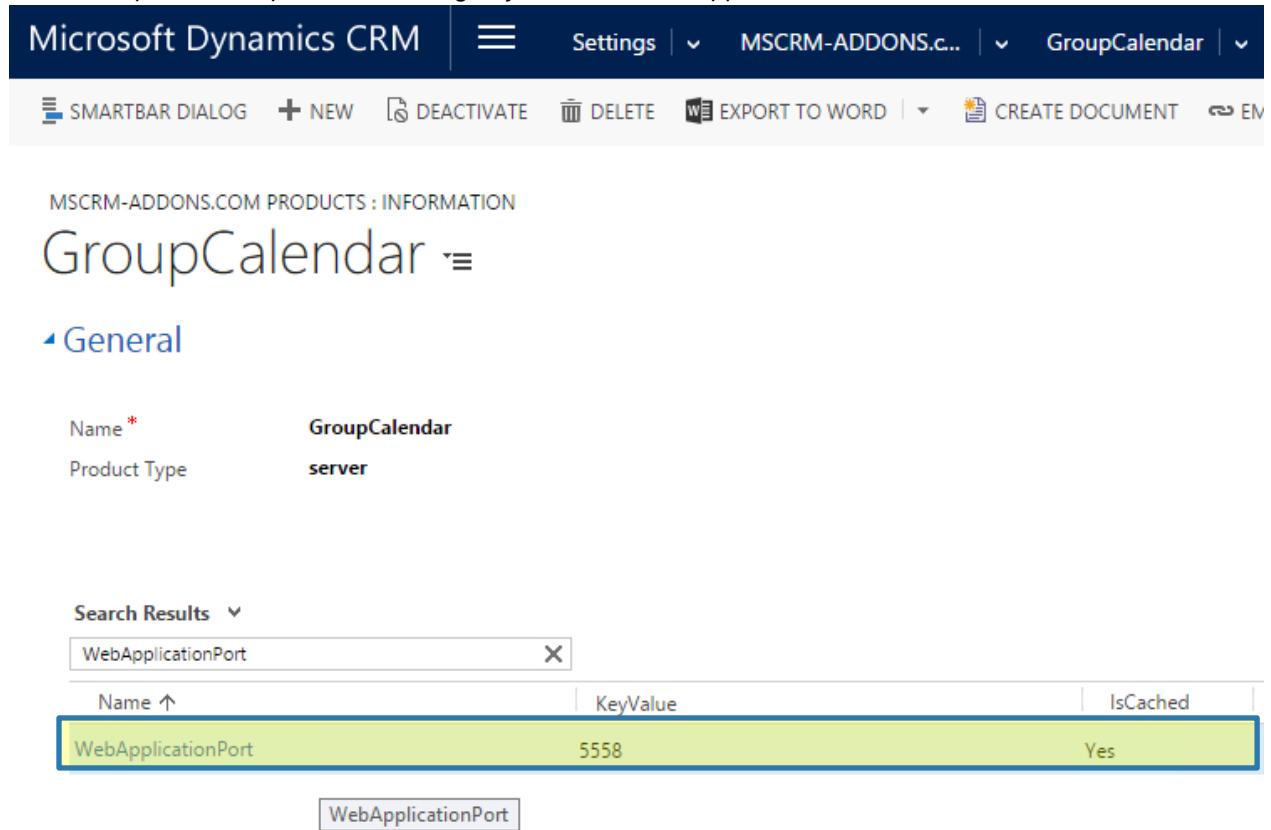
The screenshot shows the 'Active MSCRM-ADDONS.com Products' list. At the top, there is a header with buttons for NEW, DELETE, EMAIL A LINK, RUN REPORT, EXCEL TEMPLATES, and EXPORT TO EXCEL. Below the header is a table with columns: Name, Product Type, Created By, and Created On. There are six rows in the table, each representing a product. The last row, 'GroupCalendar', is highlighted with a yellow box. The table data is as follows:

Name	Product Type	Created By	Created On
TelephoneIntegration	server	Michael Dohr	06.Apr.11 10:51
SmartBar	server	Michael Dohr	16.Apr.14 12:33
RecordCounter	server	Michael Dohr	30.Jän.12 13:48
PowerSearch	server	Michael Dohr	24.Jun.16 08:55
Plugin	server	Michael Dohr	15.Mär.11 13:07
GroupCalendar	server	Michael Dohr	04.Aug.14 11:20

Figure 40: *MSCRM-ADDONS.COM products > GroupCalendar*

Step 10:

In the so opened *GroupCalendarSettingskeys*, look for *WebApplicationPort*



The screenshot shows the Microsoft Dynamics CRM interface with the following details:

- Header:** Microsoft Dynamics CRM | **Settings** | MSCRM-ADDONS.c... | **GroupCalendar** |
- Toolbar:** SMARTBAR DIALOG, NEW, DEACTIVATE, DELETE, EXPORT TO WORD, CREATE DOCUMENT, EM
- Page Title:** MSCRM-ADDONS.COM PRODUCTS : INFORMATION
- Section:** GroupCalendar
- Form Fields:**
 - Name*: GroupCalendar
 - Product Type: server
- Search Results:** A table with the following data:

Search Results		
Name ↑	KeyValue	IsCached
WebApplicationPort	5558	Yes
<input type="button" value="WebApplicationPort"/>		

Figure 41: GC SettingsKeys > WebApplicationPort

Step 11:

Now open the WebApplicationPort with a click on the Settingskey and replace the existing KeyValue with the following KeyValue:

[httpsPort][httpPort][claimsbased][addonname][debugging]

For example: 4446|5557|true|groupcalendar|false

5.3 Basic configuration of GroupCalendar II (AD FS part)

Once the configuration of the CRM part is finished, you also have to configure the AD FS.

Step 1:

Please logon to your *AD FS Server* and start *AD FS 2.0 management*.

Step 2:

Please click on the **[Add Relying Party Trust]**-button in the right column of the *Actions*-menu.

Step 3:

In the so opened *Add Relying Party Trust-Wizard*, click on the **[Start]**-button and follow the steps carefully.

Step 4:

On the *Select Data Source*-page, click on the **[Import data about the relying party published online or on a local network]**-button and then type in the URL to locate the federationmetadata.xml file.



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

For example,

<https://groupcalendar.rc1ifd.ptm-edv.at:4446/FederationMetadata/2007-06/FederationMetadata.xml>

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

Step 5:

Click on the **[Next]**-button. On the *Specify Display Name*-page, type in a display name, such as for example GroupCalendar IFD, and click again on the **[Next]**-button.

Step 6:

On the so opened *Choose Issuance Autorization Rules*-page, leave the *Permit all users to access this relying party*-option selected and then again, click on the **[Next]**-button. The *Ready to Add Trust*-page opens.

Click on the **[Next]**-button and then click on the **[Close]**-button.

Step 7:

If the *Rules Editor* appears, click on the **[Add Rule]**-button. If not, right-click the *relying party object* in the *Relying Party Trustslist*, that you have previously created. Then click on the **[Edit Claims Rules]**-button and then click on the **[Add Rule]**-button.



Make sure that the *Issuance Transform Rules*-tab is selected.

Step 8:

In the *Claim rule template*-list, select the *Pass Through or Filter an Incoming Claim*-template, and then click on the **[Next]**-button.

Step 9:

Create the following *rule*:

- Claim rule name: *Pass Through UPN* (or something similarly descriptive)

Add the following mapping:

- Incoming claim type: UPN
- Pass through all claim values

Next, click on the **[Finish]**-button.

Step 10:

In the *Rules Editor*, click on the **[Add Rule]**-button and in the *Claim rule template*-list, select the *Pass Through or Filter an Incoming Claim*-template. Click on the **[Next]**-button.

Create the following *rule*:

- Claim rule name: *Pass Through Primary SID* (or something similarly descriptive)

Add the following mapping:

- Incoming claim type: UPN
- Pass through all claim values

Finally, click on the **[Finish]**-button.

Step 11:

In the Rules Editor, click on the **[Add Rule]**-button. Then, in the *Claim rule template*-list, select *Transform an Incoming Claimtemplate* and then click on the **[Next]**-button.

Step 12:

Create the following *rule*:

- Claim rule name: *Transform Windows Account Name to Name* (or something descriptive)

Add the following mapping:

- Incoming claim type: Windows account name
- Outgoing claim type: Name
- Pass through all claim values

Step 13:

Click on the **[Finish]**-button and when you have created all three rules, click on the **[OK]**-button. Congratulations! You can now use GroupCalendar in your IFD/Claims Environment!

5.4 Troubleshooting in an IFD/Claims-based-Environment

5.4.1 Common error message

There is a common error message, that appears quite often.

Server Error in '/' Application.

ID4175: The issuer of the security token was not recognized by the IssuerNameRegistry. To accept security tokens from this issuer, configure the IssuerNameRegistry to return a valid name for this issuer.

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.IdentityModel.Tokens.SecurityTokenException: ID4175: The issuer of the security token was not recognized by the IssuerNameRegistry. To accept security tokens from this issuer, configure the IssuerNameRegistry to return a valid name for this issuer.

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:

```
[SecurityTokenException: ID4175: The issuer of the security token was not recognized by the IssuerNameRegistry. To accept security tokens from this issuer, configure the IssuerNameRegistry to return a valid name for this issuer.  
Microsoft.IdentityModel.Tokens.Saml11.Saml11SecurityTokenHandler.CreateClaims(SamlSecurityToken samlSecurityToken) +739  
Microsoft.IdentityModel.Tokens.Saml11.Saml11SecurityTokenHandler.ValidateToken(SecurityToken token) +644  
Microsoft.IdentityModel.Tokens.SecurityTokenHandlerCollection.ValidateToken(SecurityToken token) +117  
Microsoft.IdentityModel.Web.TokenReceiver.AuthenticateToken(SecurityToken token, Boolean ensureBearerToken, String endpointUri) +151  
Microsoft.IdentityModel.Web.WSFederationAuthenticationModule.SignInWithResponseMessage(HttpContext request) +615  
Microsoft.IdentityModel.Web.WSFederationAuthenticationModule.OnAuthenticateRequest(Object sender, EventArgs args) +521  
System.Web.SyncEventExecutionStep.System.Web.HttpApplication.IExecutionStep.Execute() +80  
System.Web.HttpApplication.ExecuteStep(IExecutionStep step, Boolean& completedSynchronously) +270]
```

Version Information: Microsoft .NET Framework Version:4.0.30319; ASP.NET Version:4.0.30319.237

Figure 42: GC Failure message

Here are the two main reasons why this error message appears and some solutions.

Reason 1:

The error indicates, that you are using a wrong certificate for the ADFS signing.

Solution: Make sure that the web.config matches the one 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>
```

Reason 2:

This error could also indicate problems with the access rights of the certificates' private key (which is mainly an issue of self-signed certificates).

Solution: Open your certificate store on the server (MMC, add certificate snapin for local computer) and look for your HTTPS certificate. In the so opened Context-menu, select the *manage private keys*-option and grant access to everyone.

5.4.2 Checklist for general troubleshooting in an IFD/Claims-based Environment

If you get another error message, try our general troubleshooting checklist. If your question

- 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 Connection profile been created with IFD as connection type?

You can check each single step in [CHAPTER 5 HOW TO INSTALL GROUPCALENDAR IN AN IFD/CLAIMS-BASED-ENVIRONMENT ON PAGE 33 ET SEQU.](#)

What to do if the error you receive is not part of our troubleshooting section?

No worries – simply contact our support! Please send an email to support@mscrm-addons.com and attach a screenshot of the failure message including a short description of how/when the error occurred.

6 Color-coding functionality for all activities

GroupCalendar provides you with the possibility to define a specific color for each activity. As soon as you have activated this functionality in the settings, GroupCalendar offers you the possibility to select a color for an activity. For further information on the GroupCalendar Settings, please have a look at [CHAPTER 4 GROUPCALENDAR SETTINGS ON PAGE 28](#).

To activate the color-coding-functionality, you have to add the attribute *ptm_colorcode2011* to the main form of the *activity* entity. The attribute's display name is *Color*. It consists of 12 predefined colors. For further information, please have a look at [CHAPTER 10.1 HOW TO ACTIVATE THE COLOR-CODING FUNCTIONALITY FOR ACTIVITIES ON PAGE 54](#). But: you can add additional colors. For further information on how to add additional colors, please have a look at [CHAPTER 10.2 HOW TO ADD NON-STANDARD COLORS TO GROUPCALENDAR ON PAGE 58](#).

The screenshot shows the Microsoft Dynamics CRM interface with the title bar "Microsoft Dynamics CRM". Below the title bar is a toolbar with various icons for "NEW", "DELETE", "EMAIL A LINK", "RUN REPORT", "EXCEL TEMPLATES", "EXPORT TO EXCEL", "IMPORT DATA", "CHART PANE", and "VIEW". The user is logged in as "Michael Dohr Standard".

The main area is titled "Activity Overview" and displays a weekly timeline from Monday, October 18, to Sunday, October 24. The timeline is divided into four views: Month View, Week View, Day View, and a small calendar view.

Chris Preston:

- Monday, October 18: Breakfast (orange)
- Tuesday, October 19: Breakfast (orange), Keynote (cyan)
- Wednesday, October 20: Breakfast (orange)
- Thursday, October 21: Breakfast (orange)
- Friday, October 22: Breakfast (orange)
- Saturday, October 23: Breakfast (orange)
- Sunday, October 24: Breakfast (orange)

Max Mustermann:

- Monday, October 18: Breakfast (orange)
- Tuesday, October 19: Breakfast (orange), General Sessions (green)
- Wednesday, October 20: Breakfast (orange)
- Thursday, October 21: Breakfast (orange)
- Friday, October 22: Breakfast (orange)
- Saturday, October 23: Breakfast (orange)
- Sunday, October 24: Breakfast (orange)

Michael Dohr:

- Monday, October 18: Breakfast (orange)
- Tuesday, October 19: Breakfast (orange)
- Wednesday, October 20: Breakfast (orange)
- Thursday, October 21: Breakfast (orange)
- Friday, October 22: Breakfast (orange)
- Saturday, October 23: Breakfast (orange)
- Sunday, October 24: Convergence (purple)

GroupCalendar View Settings:

- Monday, 18 Oct
- Extended Select: Select Users/Resources, Settings
- Users: All
- Which activities should be shown: New Activity
- Task, Fax, Phone Call, Email, Letter (all checked)

Figure 43: Color Coding example – weekly Timeline view

7 Show additional attributes in GroupCalendar

There are two methods to customize activity attribute in GroupCalendar. The more flexible way is explained in this documentation, while [this blog article](#) explains the alternative.

This is how a standard tooltip in GroupCalendar looks like:

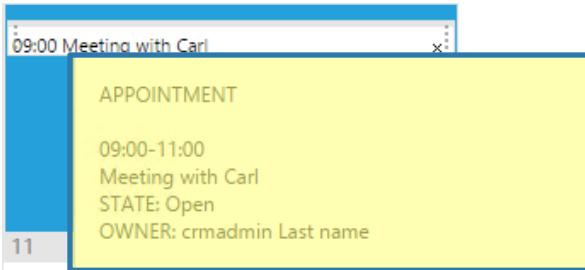


Figure 44: Standard tooltip in GroupCalendar

This standard can be customized. Basically, you have the possibility to configure as many lines as you wish, there is no limitation. The flexibility is possible, because an XML is used to create your additional attributes. There is only one setting necessary for all additional attributes.

The feature can be applied to GANTT-, TopDown-, Timeline- and Agenda View in the Day-, and Weekview. It can also be applied to the GANTT-, Agenda- and Timeline view in the Monthview.

Please follow the instructions in this chapter in order to learn how to show additional attributes in GroupCalendar.

Please find some examples for additional attributes in GroupCalendar (Day view) below.

Example for Top-Down view:

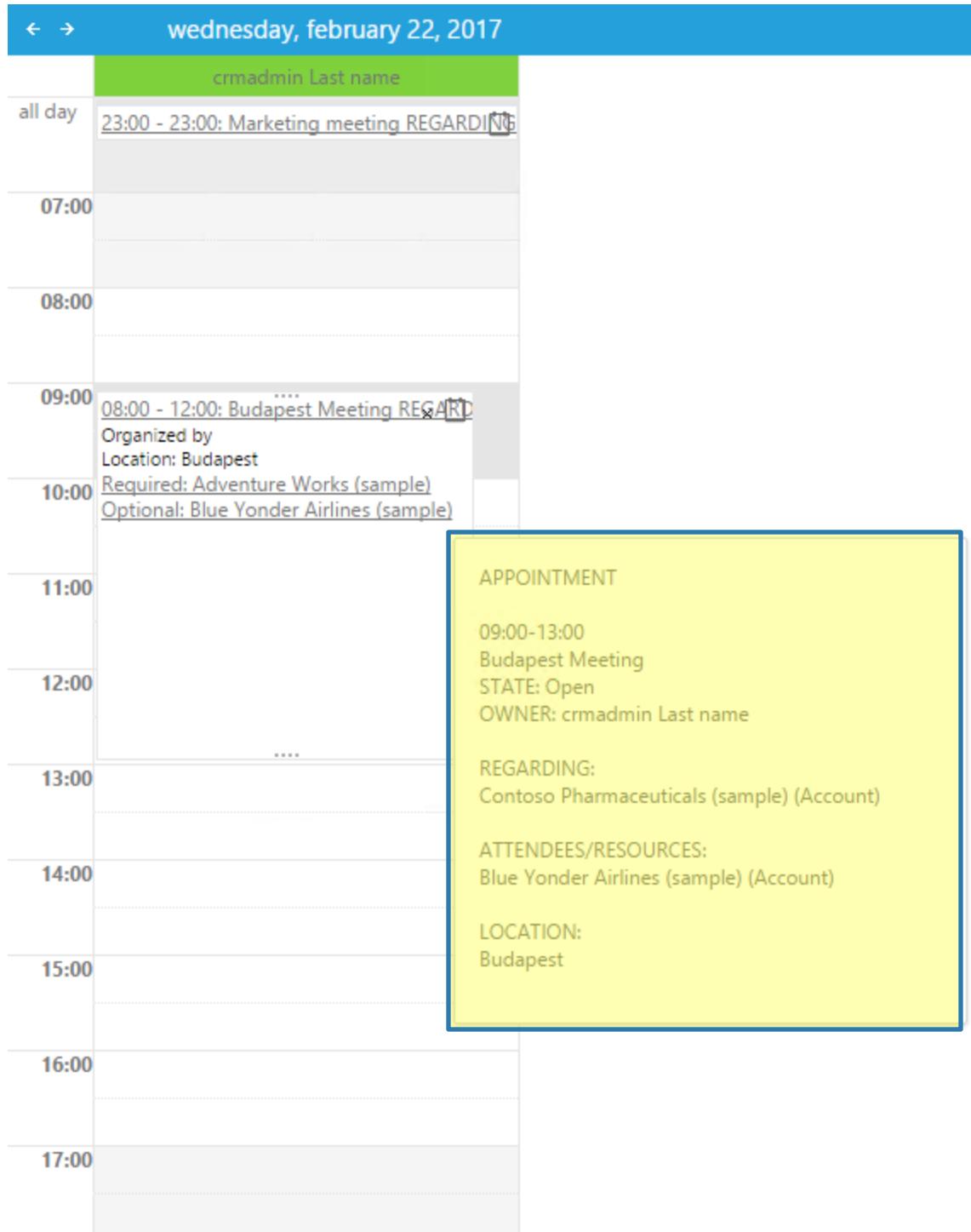


Figure 45 Day View - Top Down

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365

Example for GANTT view:

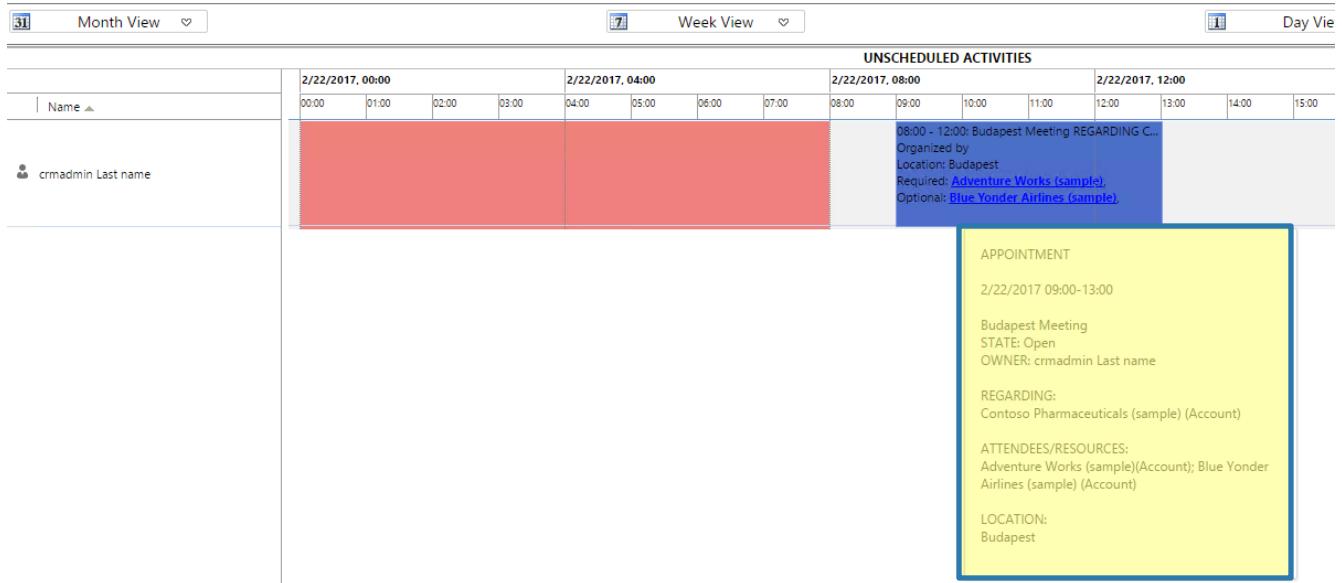


Figure 46 Day view - GANTT

Example for Agenda view:

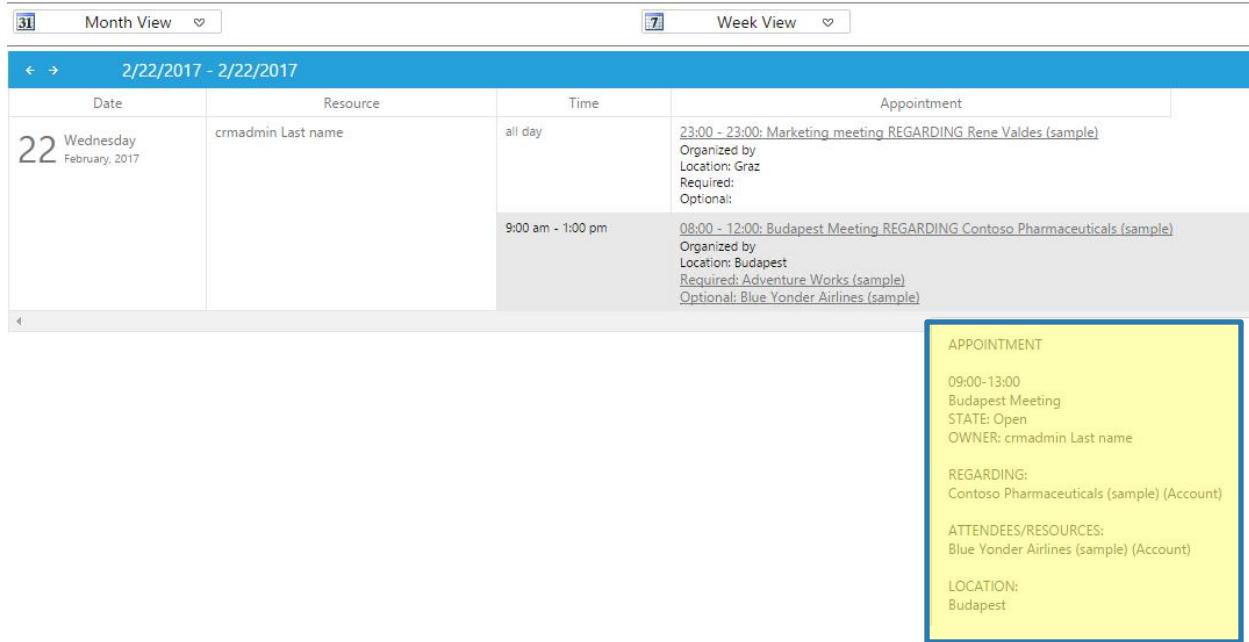


Figure 47 Day View - Agenda

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365

Example for Timeline view:

The screenshot shows the GroupCalendar interface within the Dynamics 365 workspace. The top navigation bar includes 'Dynamics 365', 'Workplace', and 'GroupCalendar'. Below the bar are buttons for 'NEW ACTIVITY', 'NEW RECORD', 'IMPORT DATA', 'SMARTBAR DIALOG', and 'POWERSEARCH'. The main area displays a timeline for Wednesday, February 22, 2017. Two events are listed: a marketing meeting from 23:00 to 23:00 and a Budapest meeting from 08:00 to 12:00. A blue box highlights the second event, showing its details: APPOINTMENT, 2/22/2017 09:00-13:00, Budapest Meeting, STATE: Open, OWNER: crmadmin Last name, REGARDING: Contoso Pharmaceuticals (sample) (Account), ATTENDEES/RESOURCES: Adventure Works (sample)(Account); Blue Yonder Airlines (sample) (Account), and LOCATION: Budapest.

Figure 48 Day view - Timeline

7.1 Create a new AdditionalAttributes settingskey

First of all, you will have to create a new settingskey. If you haven't created a settingskey yet, please read this [blog article](#). Please enter the following values:

Name*: AdditionalAttributes

IsCached*: Yes

KeyValue: Please enter here the XML (please find an example plus an explanation below)

MSCRM-ADDONS.COM SETTINGSKEYS : INFORMATION

New MSCRM-ADDO...

General

Name *	AdditionalAttributes
IsCached *	Yes
KeyValue	<AdditionalAttributes><Entity name="appointment"><View name="all"><Activity override="false"><Line>[requiredattendees] other text</Line></Activity><Tooltip override="true"><Line>Tooltip is [scheduledstart:yyyy HHmm] different in just one line [requiredattendees]</Line></Tooltip></View><View name="daytopDOWN" ><Activity override="false"><Line>this is completely different</Line><Line/><Line>[requiredattendees] other text</Line></Activity><Tooltip override="true"><Line>Tooltip is [scheduledstart] different in just one line [requiredattendees]</Line>

Basically, that's it! Once the key is saved, your additional attributes are customized the way you have set it in the XML. Please find some brief explanation to the XML in the next chapter.

7.2 The XML explained

The XML can be customized according to your needs.

7.2.1 XML example

This quite simple example shows how to show the location for appointment:

Red is the original basic condition.

Blue are the specific settings for 'location appointment'.

```
<AdditionalAttributes>
  <Entity name="appointment">
    <View name="all" >
      <Activity override="false">
        <Line>Location: [location]</Line>
      </Activity>
    </View>
  </Entity>
</AdditionalAttributes>
```

For all who have not worked with XML yet, we provide a more detailed explanation of the XML in the next chapter.

7.3 XML explained step by step

Red is the condition of the XML.

Black is the explanation.

<AdditionalAttributes>

This is the main node. It defines the basic functionality of the XML

<Entity name="appointment">

This is the entity node. It defines, for which entity the Additional attribute should be created.

Under the main node, you may enter as many entity-nodes as you wish. Possible 'names' for entity nodes are for example: serviceappointment, task, fax, letter, phonecall, email (here: appointment) etc.

<View name="all" >

Here, please enter the view node(s). If you enter 'all', it regards all views. If you wish to customize a certain view, please use one of the following terms:

monthgantt, weekgantt, daygantt, monthtimeline, weektimeline, daytimeline, monthagend, weekagenda, dayagenda, weektopdown, daytopdown

<Activity override="false">

Please define here which information should be visible in the view.

override false means that it will be added to the current information (subject)

override true means that you will have to define the whole activity text here

<Line>[requiredattendees] other text</Line>

In the line section, every line can be configured as you wish. The attribute that should be configured is shown inside [square brackets]. Everything else is free text. The only exception are date fields. When using date fields, you are able to define the format using [DATEATTRIBUTE::FORMAT]. Please find a list of all possible date formats here: [https://msdn.microsoft.com/en-us/library/8kb3ddd4\(v=vs.110\).aspx](https://msdn.microsoft.com/en-us/library/8kb3ddd4(v=vs.110).aspx).

<Line>My custom text [location] lorem ipsum [scheduledstart]</Line>

When using a line node, you may as well insert blank lines.

</Activity>

Please define here which information should be visible in TOOLTIP if 'appointment' has been selected as entity name.

override false means that it will be added to an already generated TOOLTIP.

override true means that the whole TOOLTIP text will be defined here.

A possible configuration for such a tooltip text can be found below.

The configuration of a tooltip works similar to the configuration of a line.

<Tooltip override="true">

<Line>Tooltip is [scheduledstart::yyyy HHmm] different in just one line [requiredattendees]</Line>

```
</Tooltip>
</View>
<View name="daytopDOWN" >
<Activity override="false">
<Line>this is completely different</Line>
<Line/>
<Line>[requiredattendees] other text </Line>
</Activity>
<Tooltip override="true">
<Line>Tooltip is [scheduledstart] different in just one line [requiredattendees]</Line>
</Tooltip>
</View>
</Entity>
<Entity name="serviceappointment">
<View name="all" >
<Activity override="true">
<Line>sa My custom text [location] lorem ipsum dolores [scheduledstart]</Line>
<Line>sa [subject] other text</Line>
</Activity>
<Tooltip>
<Line>sa Tooltip is [scheduledstart::HHmm] different in just one line</Line>
<Line>sa Tooltip 2 is [scheduledstart::hh:mmtt] different in just one line</Line>
```

Please finish the XML by closing each configured node:

```
</Tooltip>
</View>
</Entity>
</AdditionalAttributes>
```

8 GANTT VIEW: Custom columns in the user list

Group Calendar offers you the possibility to customize the user pane.

Per default, only the full name of the system user is shown.

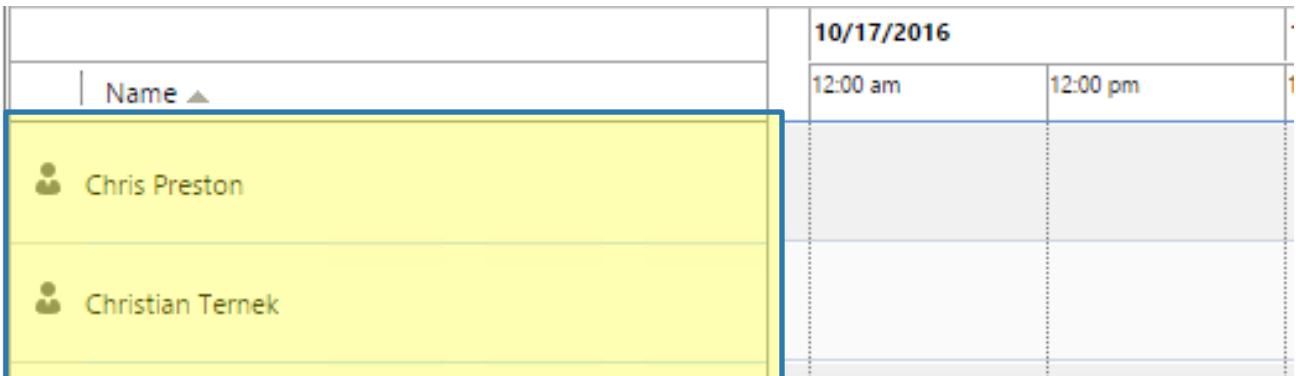


Figure 49: Standard settings

The custom columns functionality allows you to customize the columns. You can define the columns, its width and sorting.

Furthermore, you can add additional information fields to the user, like for example the access mode, the full name and the primary e-mail.

Learn how to customize the columns in [CHAPTER 10.3 HOW TO CUSTOM COLUMNS IN THE USER LIST ON PAGE 66](#).

9 Show Working Hours and Time-Off in GANTT – AND TOPDOWN VIEW

Up from Dynamics CRM 2015, it is possible to specify working hours and time-offs (e.g. vacation) for each user and resource. With Group Calendar, you can additionally display these hours.

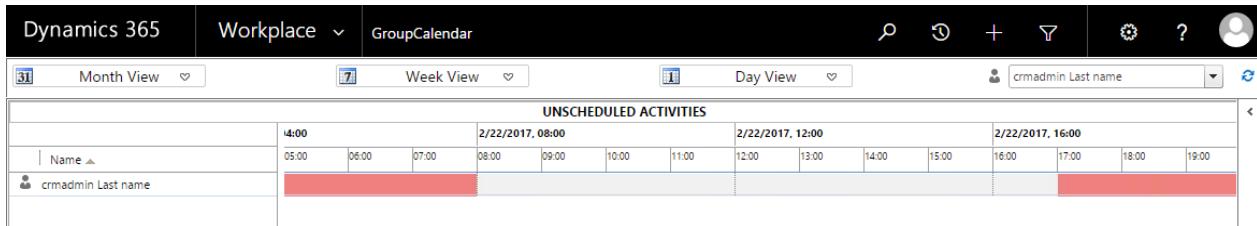


Figure 50: GANTT view showing time off (red) and working hours (grey)

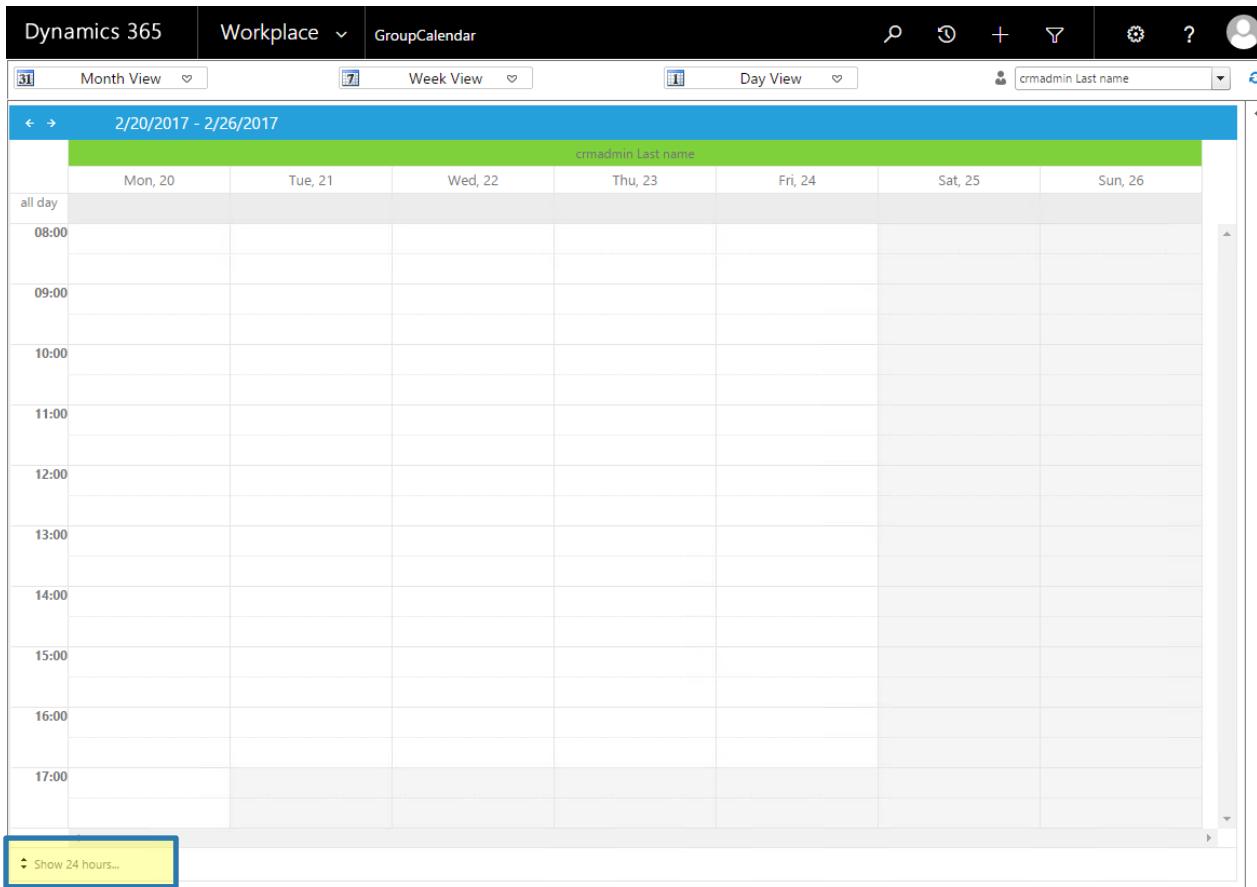


Figure 51: Top down view showing working hours (white) and time off (grey)



You have the possibility to switch from the working hours view to a 24-hour view by clicking on the highlighted option in the above figure.

For further information, please have a look at our How-To section in [CHAPTER 10.4 HOW TO SHOW WORKING HOURS AND TIME-OFF ON PAGE 71](#).

10 Tutorials (“How To’s”)

This chapter provides you with helpful tutorials that show you how to work with GroupCalendar efficiently.

10.1 How to activate the color-coding functionality for activities

The following step-by-step instruction outlines how to activate the color-coding functionality for activities in GroupCalendar.



The following step-by-step instruction describes how to activate the color-coding-functionality for the appointment entity. But: You can apply Step 1 – 6 (with the exception of selecting another *activity type* than appointment) to any other activity.

- 1) Open your CRM and navigate to Settings > Customization > Customize the system.

The screenshot shows the Microsoft Dynamics CRM ribbon interface. The 'Settings' tab is selected, and the 'Customizations' sub-tab is active. Below the ribbon, there are several navigation links: RIBBON WORKBENCH, POWERSEARCH, SMARTBAR DIALOG, POWERSEARCH (SL), and POWER SEARCH. The main content area is titled 'Customization'. A heading 'Which feature would you like to work with?' is followed by four options: 'Customize the System' (selected and highlighted with a blue border), 'Solutions', 'Themes', and 'Publishers'. Each option has a brief description and a corresponding icon.

Feature	Description
Customize the System	Create, modify, or delete components in your organization. Components include entities, fields, relationships, forms, reports, processes, and others.
Solutions	Create, modify, export, or import a managed or unmanaged solution.
Themes	Adjust your organization's colors. Create, change, or delete themes that are used in your organization.
Publishers	Create, modify or delete a solution publisher.

Figure 52: Settings > Customization > Customize the system

GroupCalendar for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365

- 2) In the so opened window, click on Entities and double click on the entity Appointment. (If you want to apply this step to another entity, simply select the entity you want to customize).

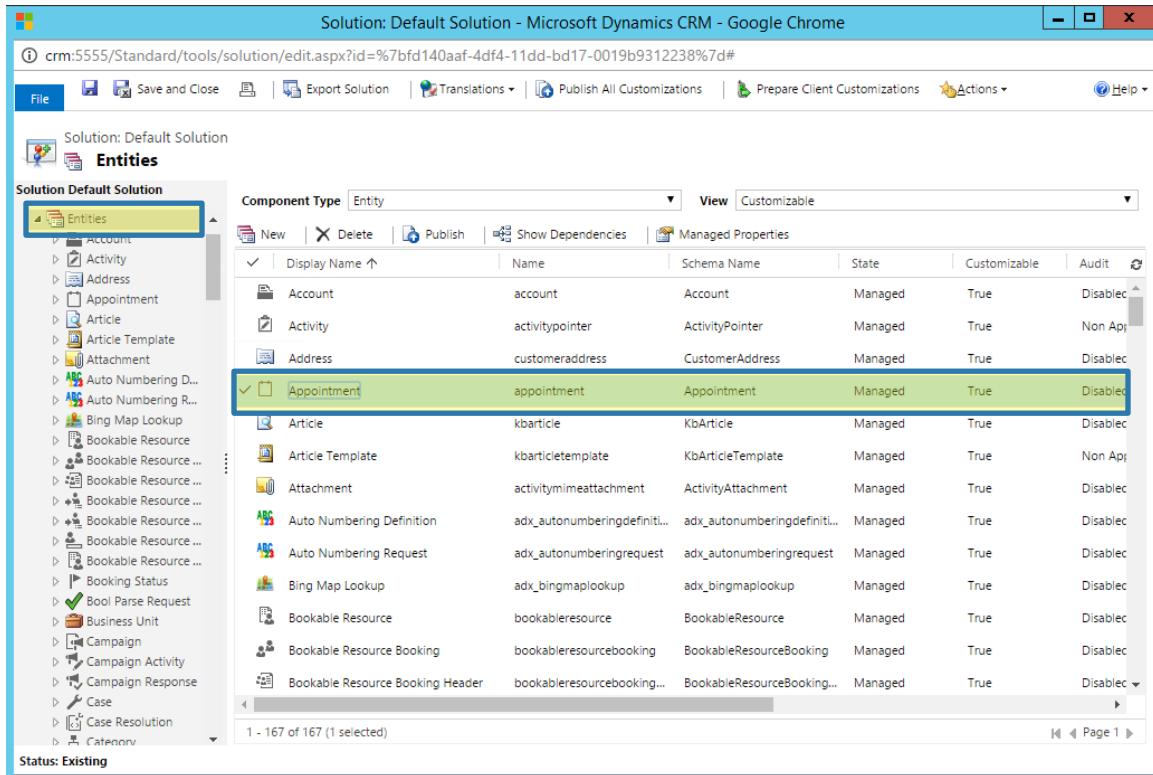


Figure 53: Default Solution > Entities > Appointment

- 3) In the so opened *Appointment entity settings*, click on *Forms* in the menu on the left and you will receive a list with all the forms of the entity. Double click on the main *Appointment* form.

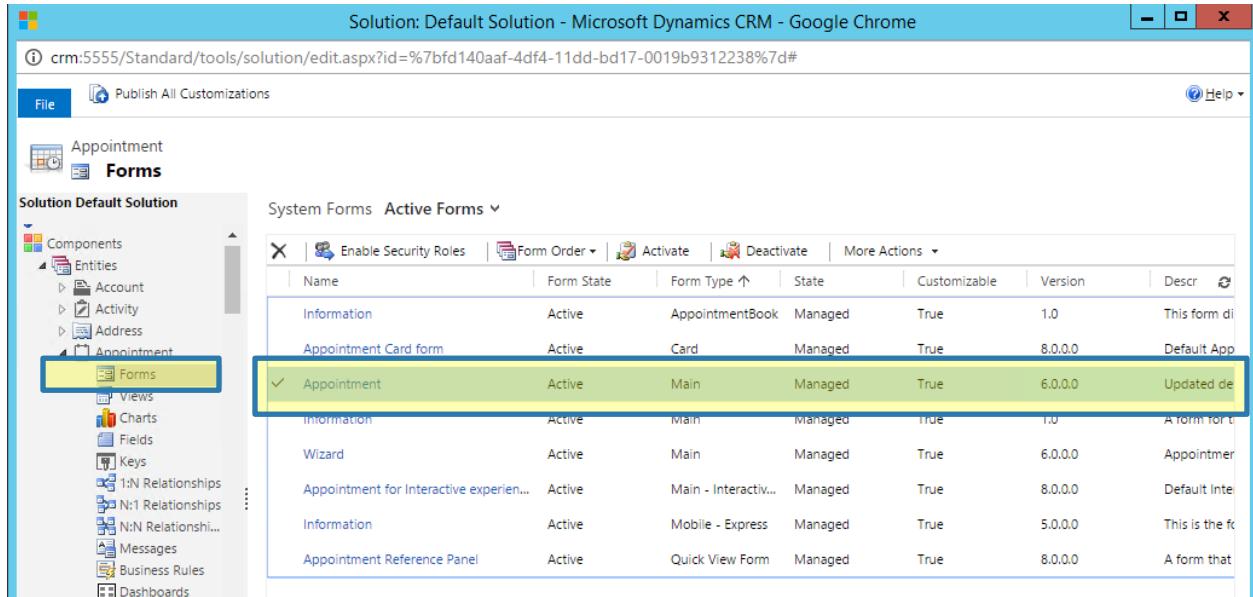


Figure 54: Appointment entity settings

- 4) In the so opened window, you can customize the main form of this entity. To add the color-coding- functionality, simply click on the *Color*-field within the menu on the right and position it in a free space within the form via drag and drop.

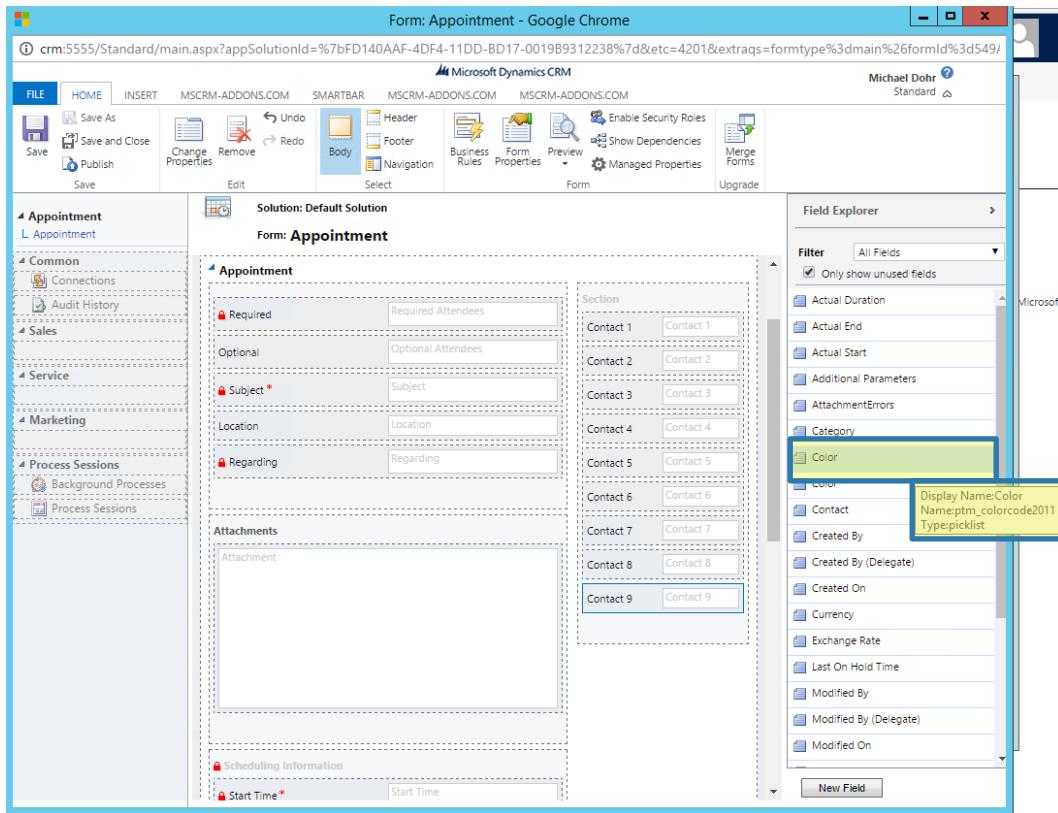


Figure 55: Color field with description

- 5) Once you have dropped the Color-field at a convenient place, please click on the [**Save**]-button.
Then click on the [**Publish**]-button.

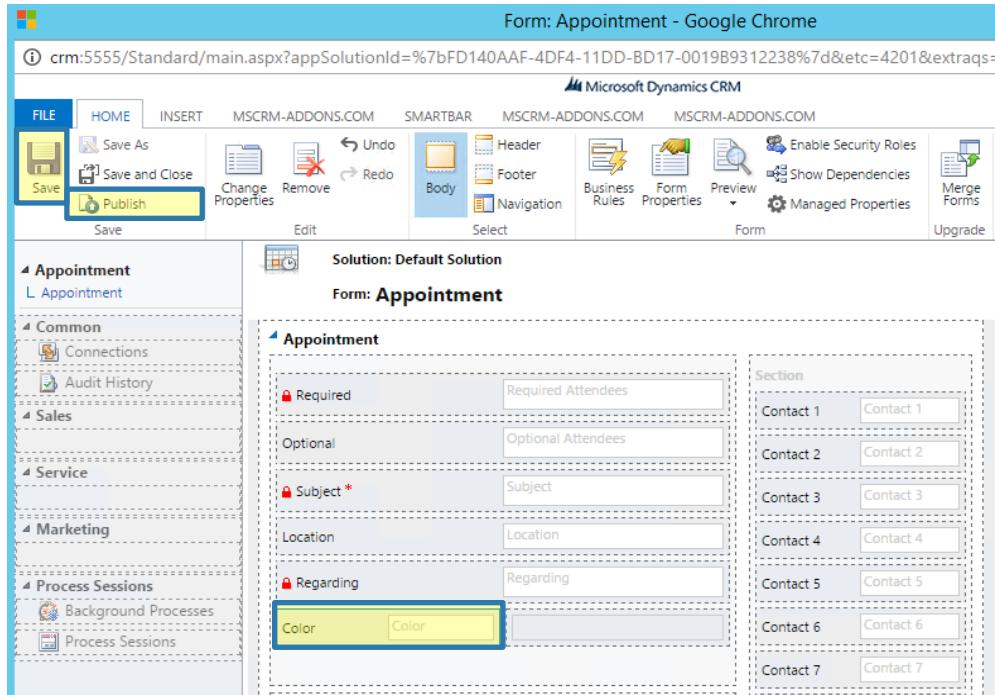


Figure 56: Save and publish your customization

- 6) The result: From now on, the color-drop-down-menu will appear within the appointment entity when scheduling an appointment.

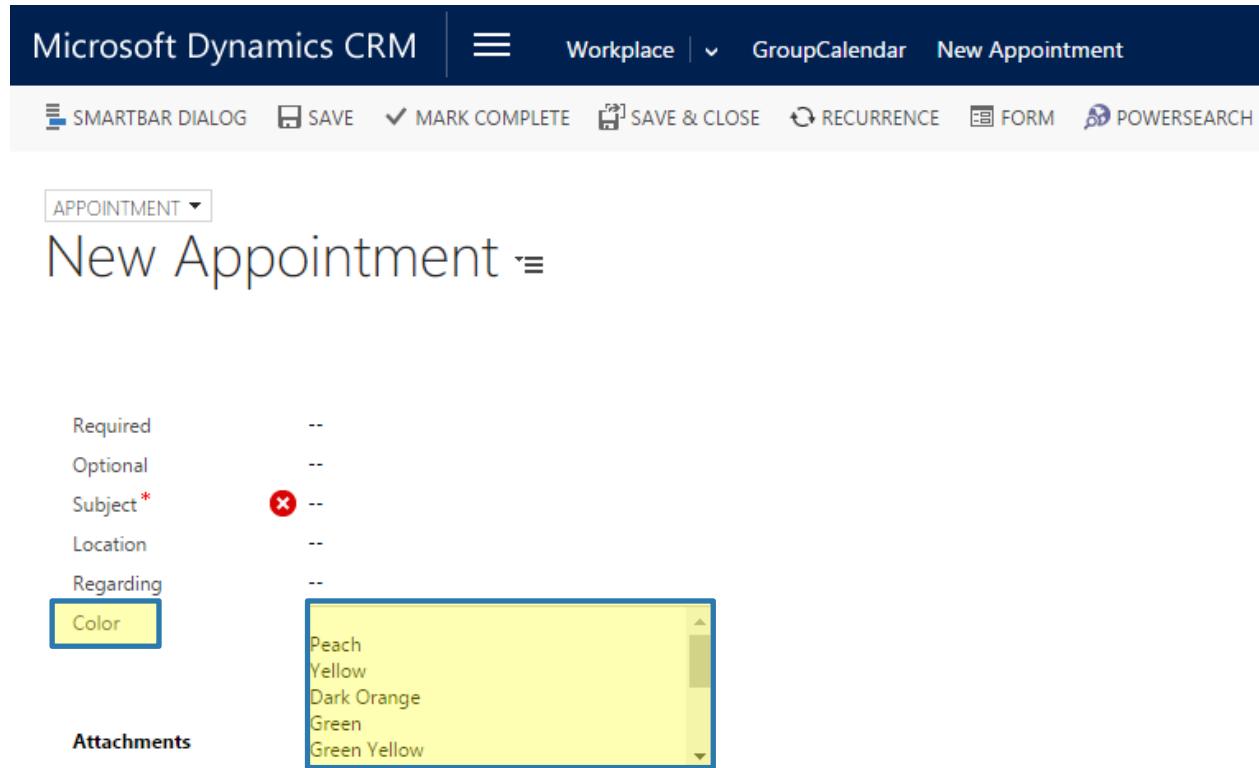


Figure 57: The Color-Coding functionality has now been added to the appointment entity

10.2 How to add non-standard colors to GroupCalendar

Adding further colors than the default ones to GC is usually no problem. Nevertheless, there are a few prerequisites you should take care of.

First of all, make sure that you know the HEX Code of the color you would like to add. (There are several free online color picker tools, like www.colorpicker.com)



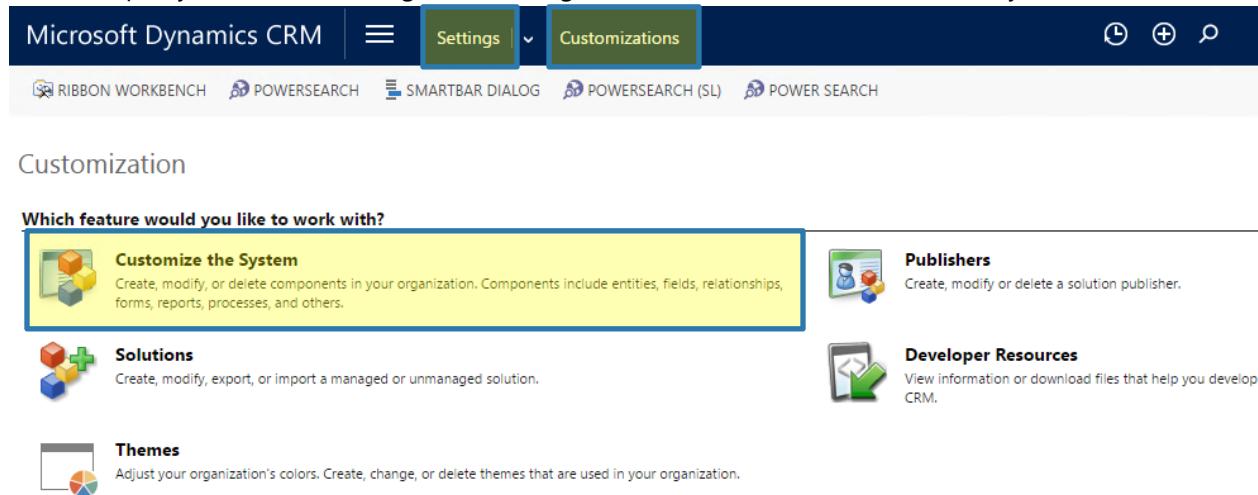
The following step-by-step instruction describes how to add additional colors to the appointment entity. But: You can apply Step 1 – 8 (with the exception of selecting another *activity type* and *activity type color code* than appointment) to any other activity.

However, these are different color settings for the different activities:

- TaskColorCode
- ServiceAppointmentColorCode
- EmailColorCode
- PhoneCallColorCode
- FaxColorCode
- LetterColorCode
- AppointmentColorCode

In tutorial, we will add a light grey color with the hex code #E0E0E0.

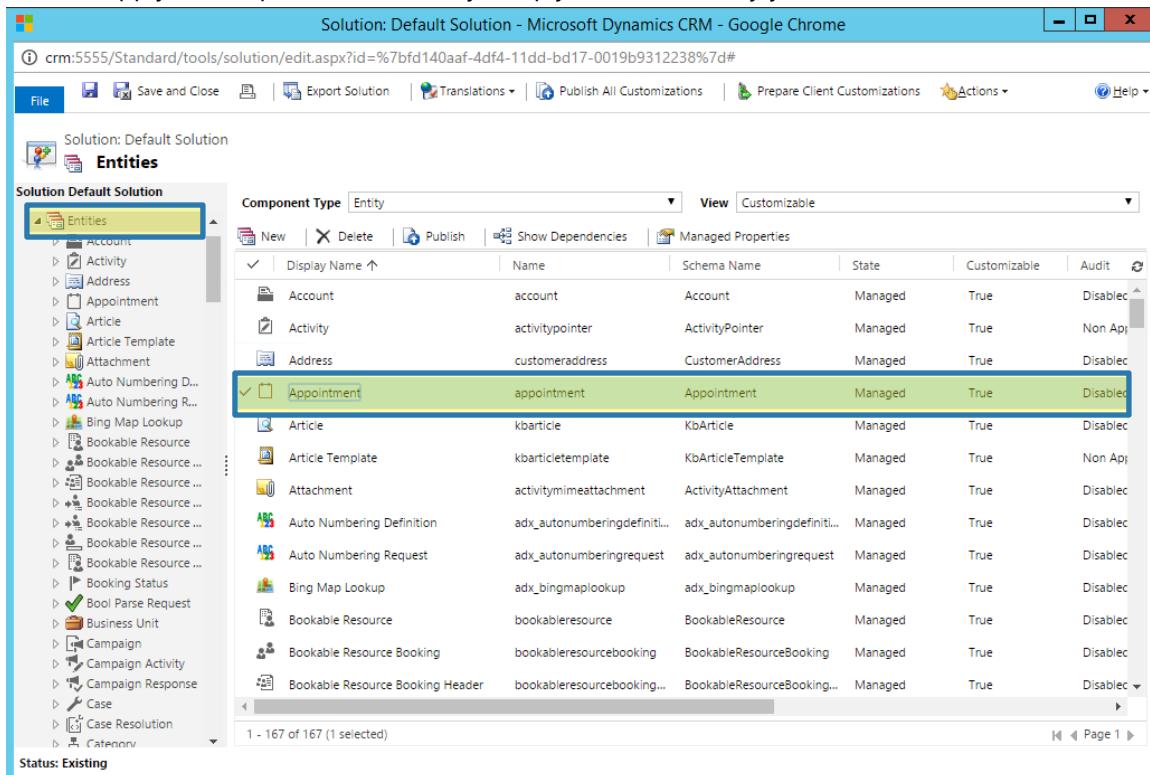
- 1) Open your CRM and navigate to Settings > Customization > Customize the system.



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar has 'Settings' and 'Customizations' buttons, with 'Customizations' being the active tab. Below the navigation is a ribbon bar with icons for 'RIBBON WORKBENCH', 'POWERSHIFT', 'SMARTBAR DIALOG', 'POWERSHIFT (SL)', and 'POWER SEARCH'. The main content area is titled 'Customization' and contains a section titled 'Which feature would you like to work with?'. This section includes four items: 'Customize the System' (highlighted with a yellow box), 'Solutions', 'Themes', and 'Publishers'. Each item has a brief description and a corresponding icon.

Figure 58: Settings > Customization > Customize the system

- 2) In the so opened window, click on *Entities* and double click on the entity *Appointment*. (If you want to apply this step to another entity, simply select the entity you want to customize)

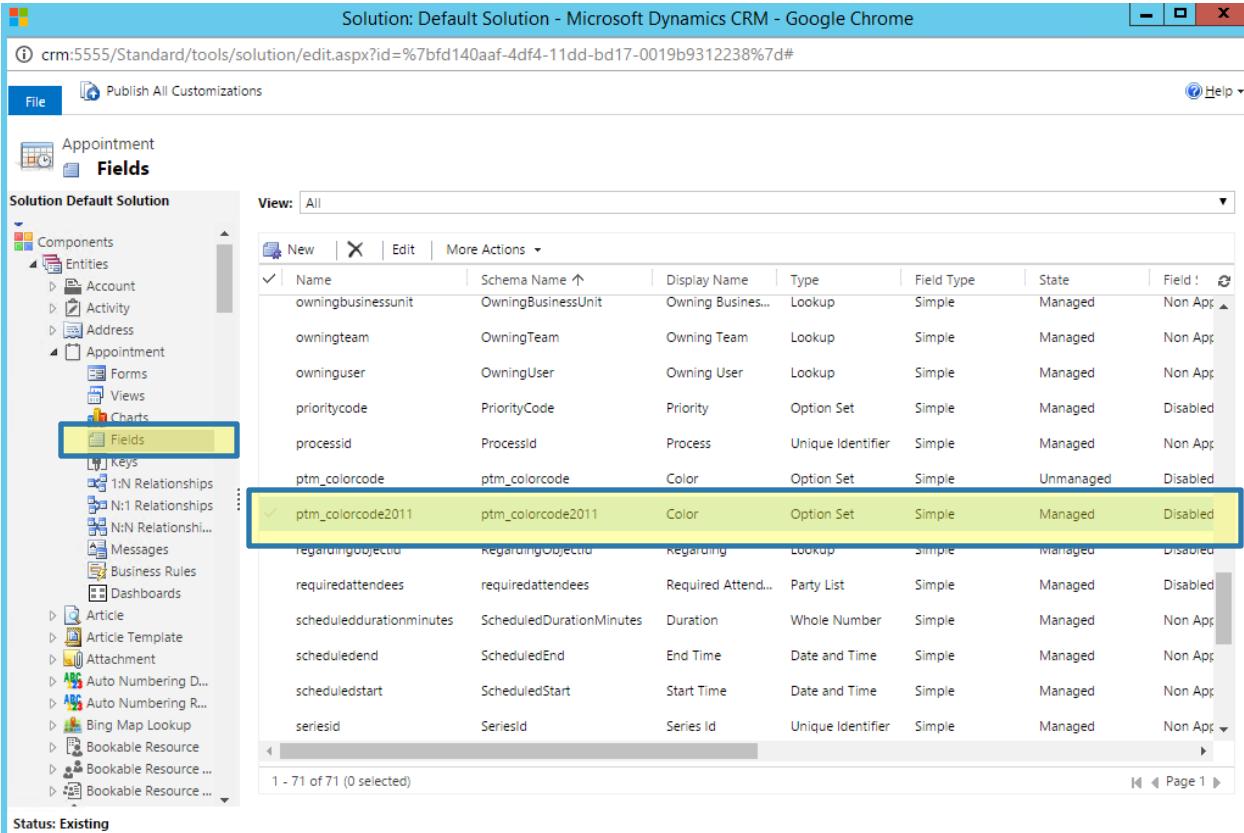


The screenshot shows the 'Solution: Default Solution - Microsoft Dynamics CRM' window. The left sidebar shows a tree view of entities under 'Solution Default Solution', with 'Entities' selected. The main grid lists entities with columns for 'Display Name', 'Name', 'Schema Name', 'State', 'Customizable', and 'Audit'. The 'Appointment' entity is selected and highlighted in green. The status bar at the bottom indicates 'Status: Existing'.

Display Name ↑	Name	Schema Name	State	Customizable	Audit
Account	account	Account	Managed	True	Disabled
Activity	activitypointer	ActivityPointer	Managed	True	Non API
Address	customeraddress	CustomerAddress	Managed	True	Disabled
Appointment	appointment	Appointment	Managed	True	Disabled
Article	kbarticle	KbArticle	Managed	True	Disabled
Article Template	karticletemplate	KbArticleTemplate	Managed	True	Non API
Attachment	activitymimeattachment	ActivityAttachment	Managed	True	Disabled
Auto Numbering Definition	adx_autonumberingdefiniti...	adx_autonumberingdefiniti...	Managed	True	Disabled
Auto Numbering Request	adx_autonumberingrequest	adx_autonumberingrequest	Managed	True	Disabled
Bing Map Lookup	adx_bingmaplookup	adx_bingmaplookup	Managed	True	Disabled
Bookable Resource	bookableresource	BookableResource	Managed	True	Disabled
Bookable Resource Booking	bookableresourcebooking	BookableResourceBooking	Managed	True	Disabled
Bookable Resource Booking Header	bookableresourcebooking...	BookableResourceBooking...	Managed	True	Disabled

Figure 59: Default Solution > Entities > Appointment

- 3) In the so opened *Appointment entity settings*, click on *Fields* in the menu on the left and you will receive a list with all the fields of the entity. Double click on the *ptm_colorcode2011* field.



The screenshot shows the Microsoft Dynamics CRM solution editor interface. The title bar reads "Solution: Default Solution - Microsoft Dynamics CRM - Google Chrome". The URL in the address bar is "crm:5555/Standard/tools/solution/edit.aspx?id=%7bfd140aaef-4df4-11dd-bd17-0019b9312238%7d#". The left sidebar shows the "Solution Default Solution" structure, with "Appointment" selected and "Fields" highlighted. The main area displays a grid of fields for the "Appointment" entity. The "ptm_colorcode2011" field is selected and highlighted in yellow. The grid columns include Name, Schema Name, Display Name, Type, Field Type, State, and Field ID. The "ptm_colorcode2011" row shows the following details:

Name	Schema Name	Display Name	Type	Field Type	State	Field ID
ptm_colorcode2011	ptm_colorcode2011	Color	Option Set	Simple	Managed	Disabled

At the bottom of the grid, it says "1 - 71 of 71 (0 selected)".

Figure 60: Open fields > *ptm_colorcode2011*

- 4) In the so opened window, click on the [**Add**]-button (the green plus-sign) ① in the *Options*-area and type in the label of the color (the name to be displayed in the color drop-down-menu). For the color we add, we use the name *light grey*. ②

It is important that you remember the color-value that is defined by your CRM system. In this example, the value is *100.000.000*. ③

Finally, add the HEX Code ④ and the newly added color will be visible in the standard color list ⑤.

As soon as you have finished your customizations, click on the [**Save and Close**]-button in the Command bar. ⑥

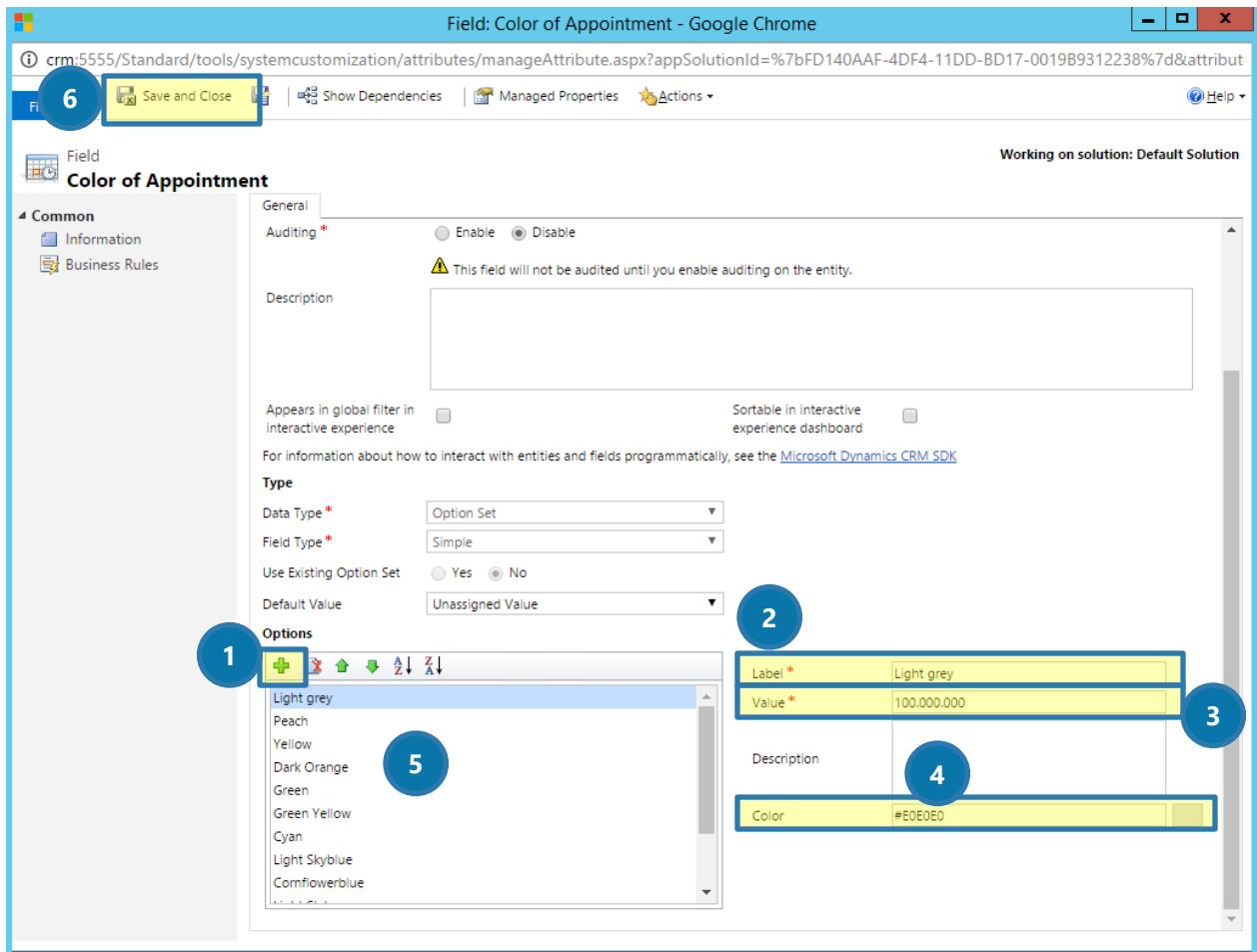


Figure 61: Add new color

- 5) Please do not forget to click on the [**Publish All Customizations**]-button. Once the customizations have been published, close the window.

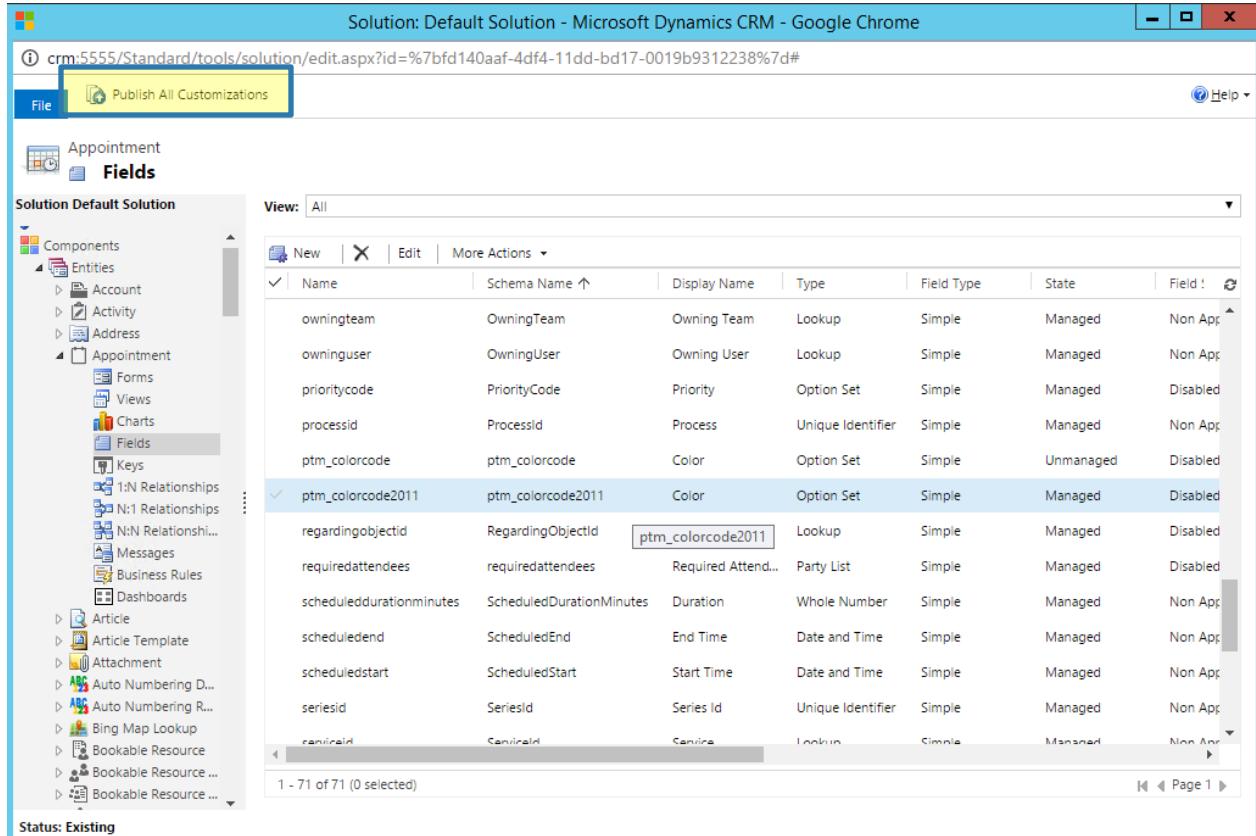


Figure 62: Publish All Customizations

- 6) Next, go back to the *Settings* section of your CRM and open the *MSCRM-ADDONS.com Products*. In the so opened window, double click on *GroupCalendar* within the product list.

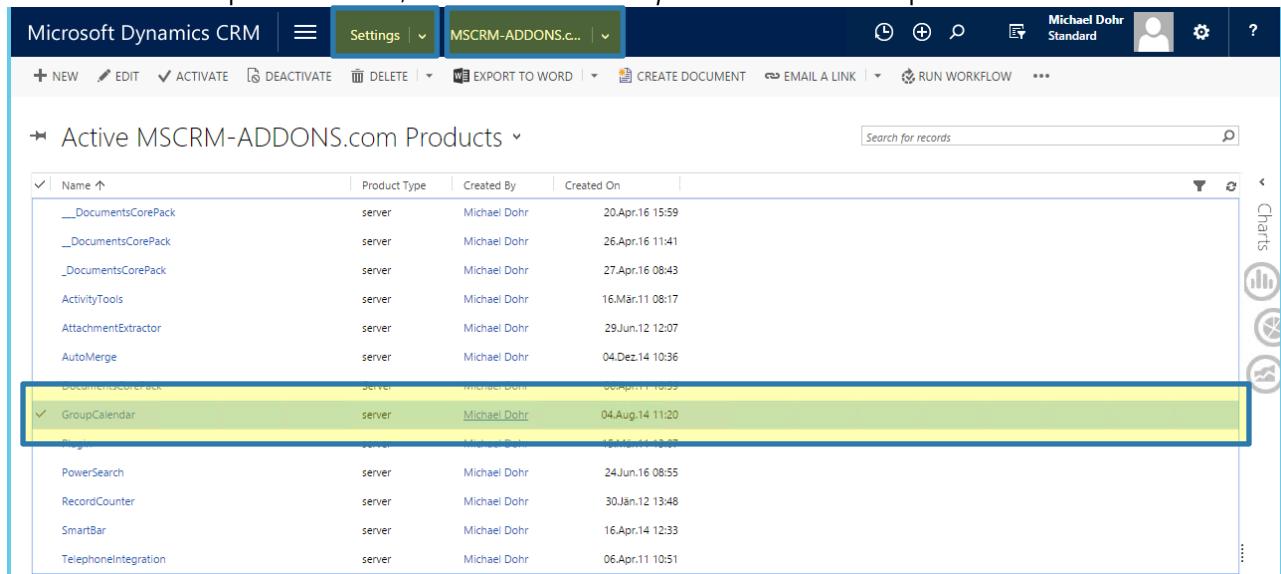


Figure 63: GC Settings > MSCRM-ADDONS.com Products > GroupCalendar

- 7) In the so opened *GroupCalendar Settingskeys*, look for *AppointmentColorCode* and open it with a double-click.

Microsoft Dynamics CRM | ☰ Settings | MSCRM-ADDONS.c... | GroupCalendar | ⏱

SMARTBAR DIALOG + NEW DEACTIVATE DELETE EXPORT TO WORD CREATE DOCUMENT EMAIL A LINK RUN WORKFLOW

MSCRM-ADDONS.COM PRODUCTS : INFORMATION

GroupCalendar ☰

General

Name *	GroupCalendar	Subscription Number	--
Product Type	server	Scheduler	🔒 --

Active MSCRM-ADDONS.com Settings... ▾

Name ↑	KeyValue	IsCached	Created On
AddGanttAttrAppointment1	location	Yes	14.Mär.15 19:03
AddGanttAttrAppointment2	requiredattendees	Yes	14.Mär.15 19:03
AddGanttAttrDesappointment1	Location	Yes	14.Mär.15 19:04
AddGanttDesappointment2	Required	Yes	14.Mär.15 19:04
AllowExport	true	Yes	04.Aug.14 11:20
AppointmentColorCode	1 #FFDAB9;2 #FFFF00;3 #FF8C00;4 #00FF00;5 #ADFF2F...	Yes	04.Aug.14 11:20

Figure 64: GroupCalendar settingskeys - AppointmentColorCode



The color settings depend on which activity you want to add:

- TASK > TaskColorCode
 - SERVICEAPPOINTMENT > ServiceAppointmentColorCode
 - EMAIL > EmailColorCode
 - PHONECALL > PhoneCallColorCode
 - FAX > FaxColorCode
 - LETTER > LetterColorCode
 - APPOINTMENT > AppointmentColorCode

- 8) However, in the so opened window, you must add your color to the *KeyValue*-area. To do so, add the following structure to the existing colors:

COLOR VALUE|HEXCOLOR; COLOR VALUE|HEXCOLOR; COLOR VALUE|HEXCOLOR;

This is how it looks like in our example:

100000000|#E0E0EO



Please make sure to separate the single colors by using a *semicolon* (;)
AND: Do not forget to save your changes!

The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes "Microsoft Dynamics CRM", "Settings", "MSCRM-ADDONS.c...", "AppointmentColorC...", and user information "Michael Dohr Standard". Below the navigation is a toolbar with icons for "SMARTBAR DIALOG", "NEW", "DEACTIVATE", "DELETE", "EXPORT TO WORD", "CREATE DOCUMENT", "EMAIL A LINK", "RUN WORKFLOW", "START DIALOG", and more. The main content area displays "MSCRM-ADDONS.COM SETTINGSKEYS : INFORMATION" and the "AppointmentColorCode" settings key. The "General" tab is selected. In the "KeyValue" field, the value "1|#FFDAB9;2|#FFFF00;3|#FF8C00;4|#00FF00;5|#ADFF2F;6|#00FFFF;7|#87CEFA;8|#6495ED;9|#778899;10|#A020F0;11|#FFB6C1;12|#FFE4E1;100000000|#E0E0EO" is entered, with the entire string highlighted by a blue border.

Figure 65: GroupCalendar settingskeys with added color

- 9) Once saved, refresh your browser with F5 and navigate back to GroupCalendar in order to create a new appointment. You will find the new color added and ready to be used.

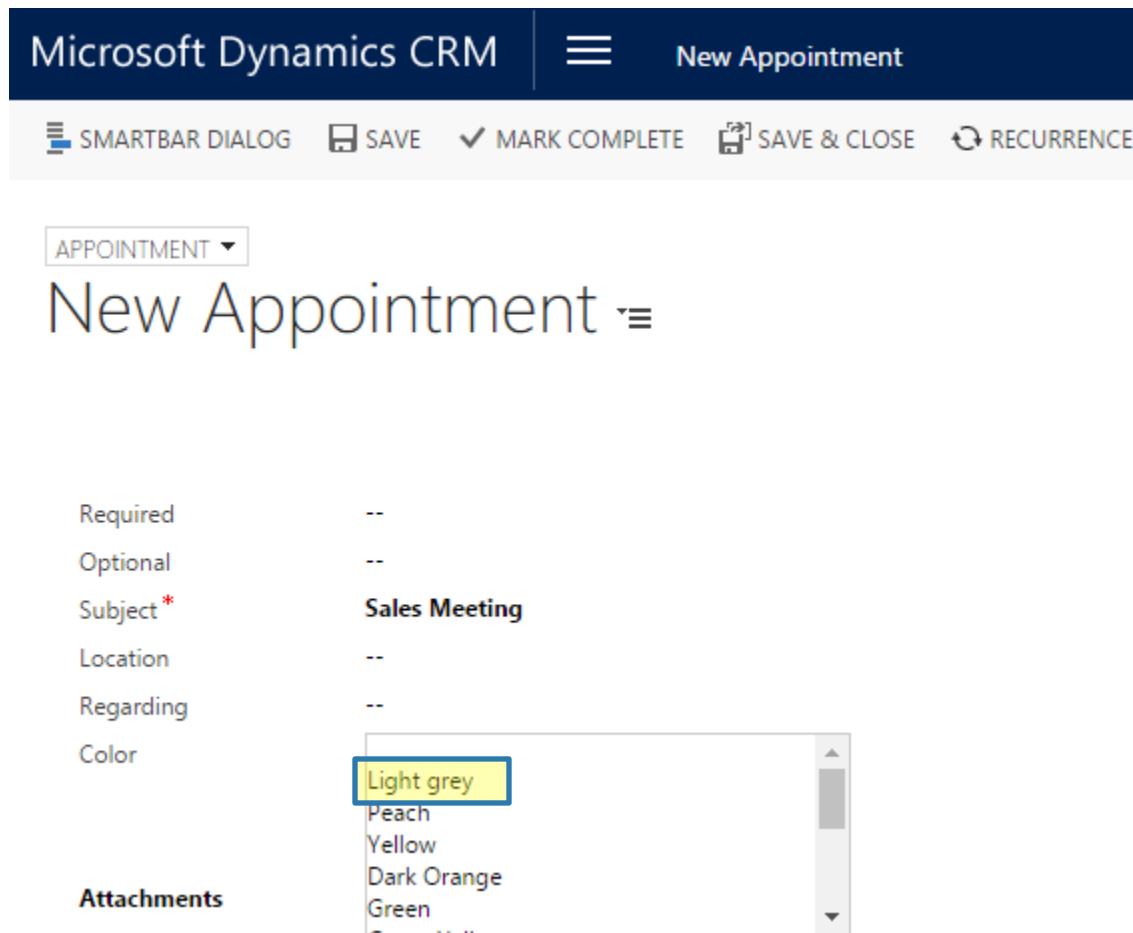


Figure 66: GroupCalendar: new color added to appointment

10.3 How to custom columns in the user list

This step-by-step tutorial outlines how to custom columns in the user list.

- 1) Open your *CRM Settings > Customizations > Customize the system*.

In the so opened window, open the *Entities*-drop down menu 1, scroll down to *User* 2 and double click on *Views* 3. At the right side, click on the **[New]**-button 4.

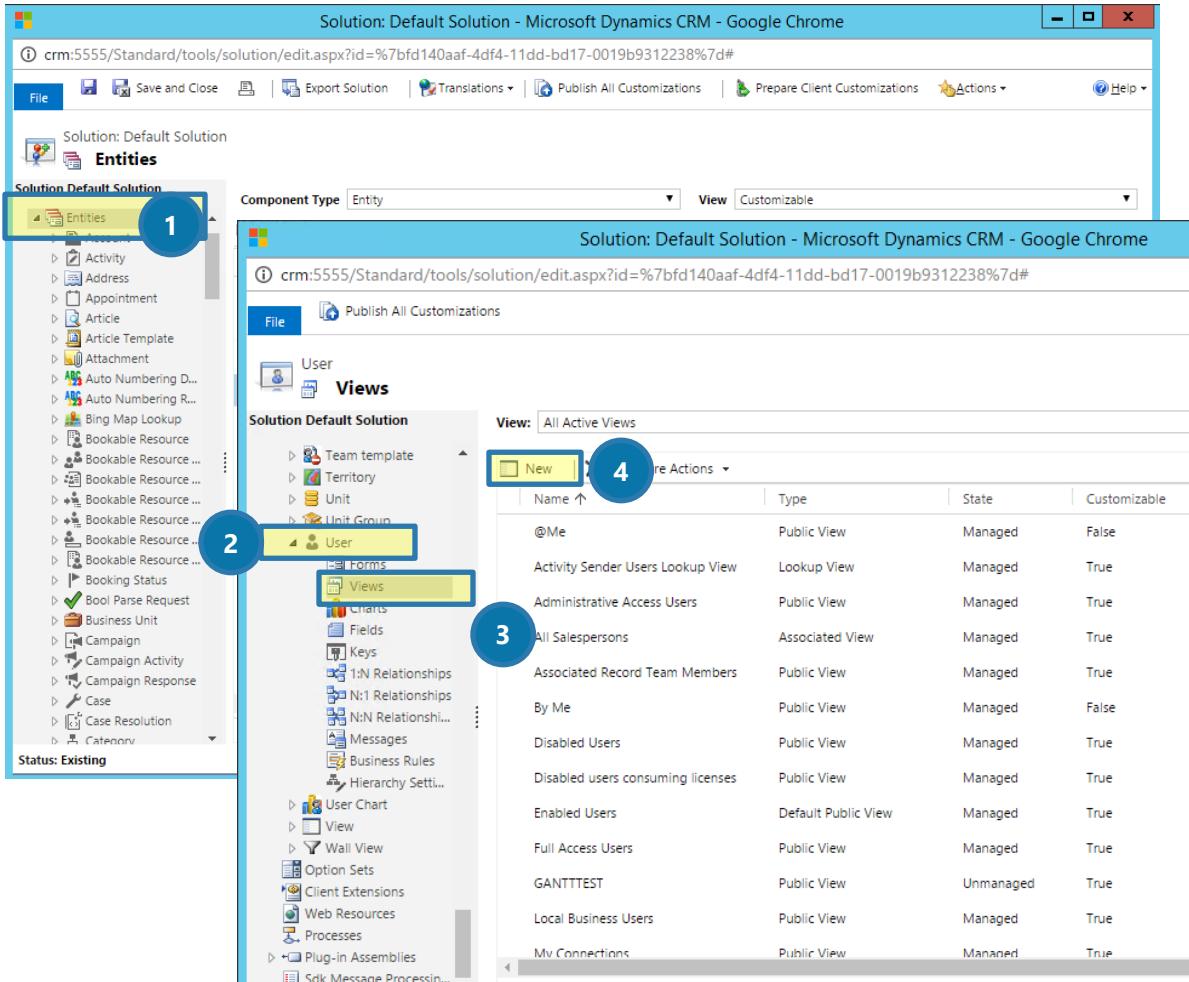


Figure 67: GroupCalendar: new color added to appointment

Within the next window, you can define your view. Specify the number, the width and the sorting of the columns you need. The next steps outline how to do so.

- 2) As soon as you have clicked on the [**Add New**]-button, the *View Properties*-window opens. Enter a random name for your new view (here: GroupCalendar Gantt View) and click on the [**OK**]-button. You could also add a description, but adding it is optional.

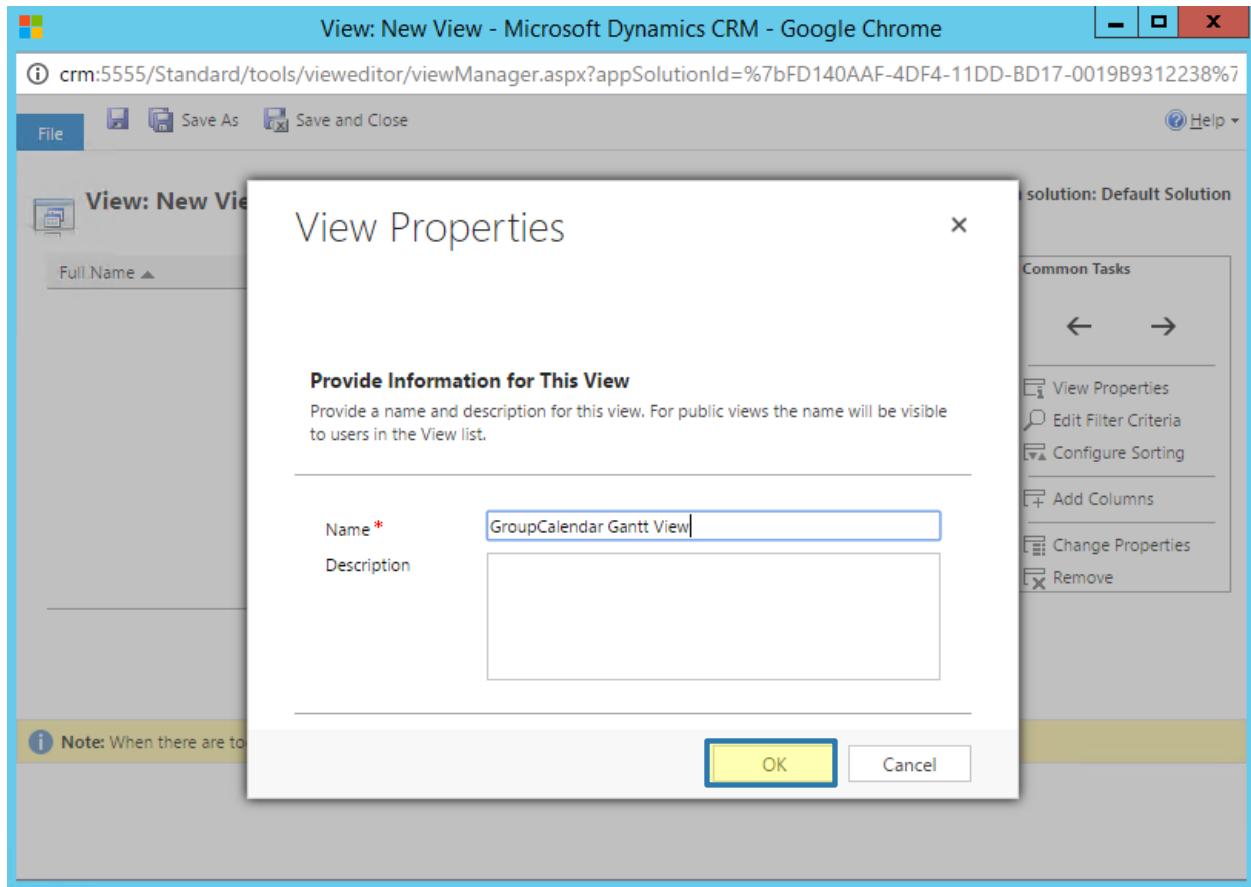


Figure 68: GroupCalendar: view properties window

- 3) Clicking on the **[Add Columns]**-button in the menu in the box at the right side enables you to add and/or customize your columns.

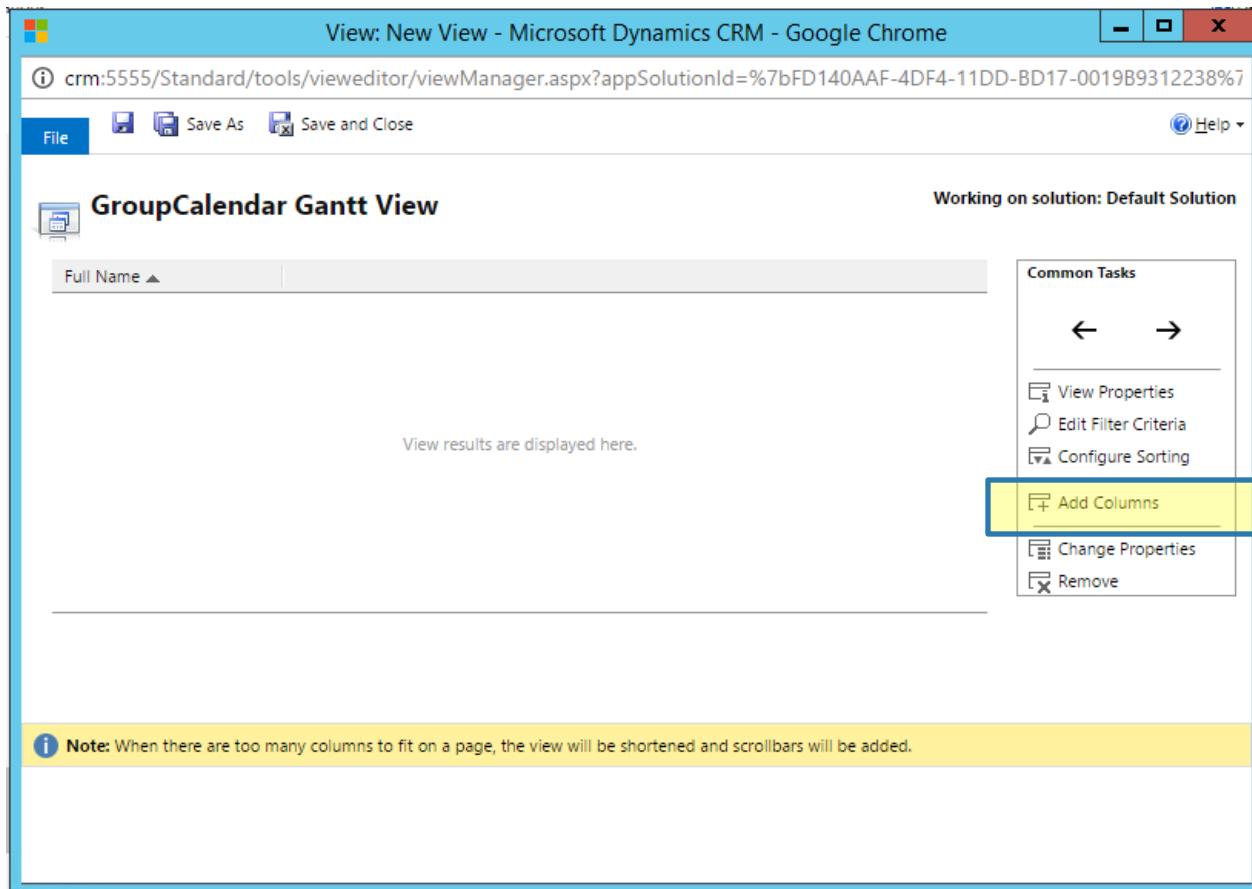


Figure 69: GroupCalendar - add columns

- 4) Simply check the check-boxes at the left side next to the items you want to add to the columns and click on the **[OK]**-button.

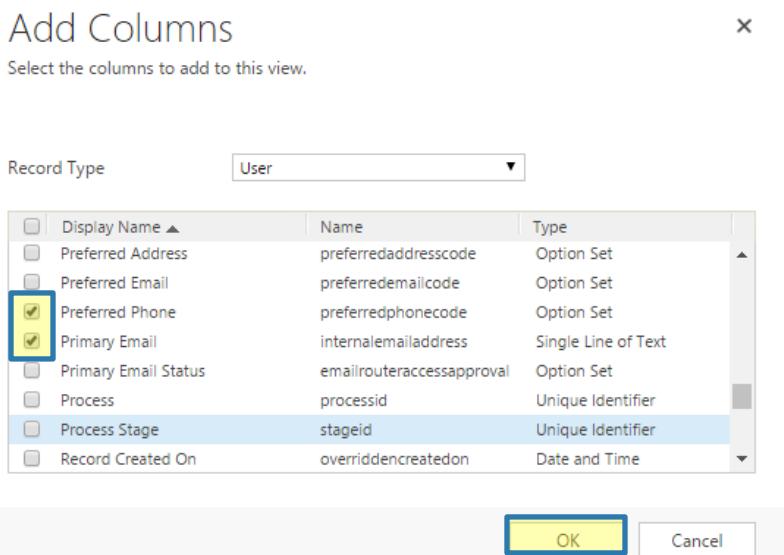


Figure 70: GroupCalendar – define columns

- 5) The single columns are now displayed in the previously created *GroupCalendar Gantt View* (here: Full Name, Address, First Name, Preferred Phone, Primary Email). To configure the sorting of your columns, select the one you would like to configure and click on the [**Configure Sorting**]-button in the box at the right side.

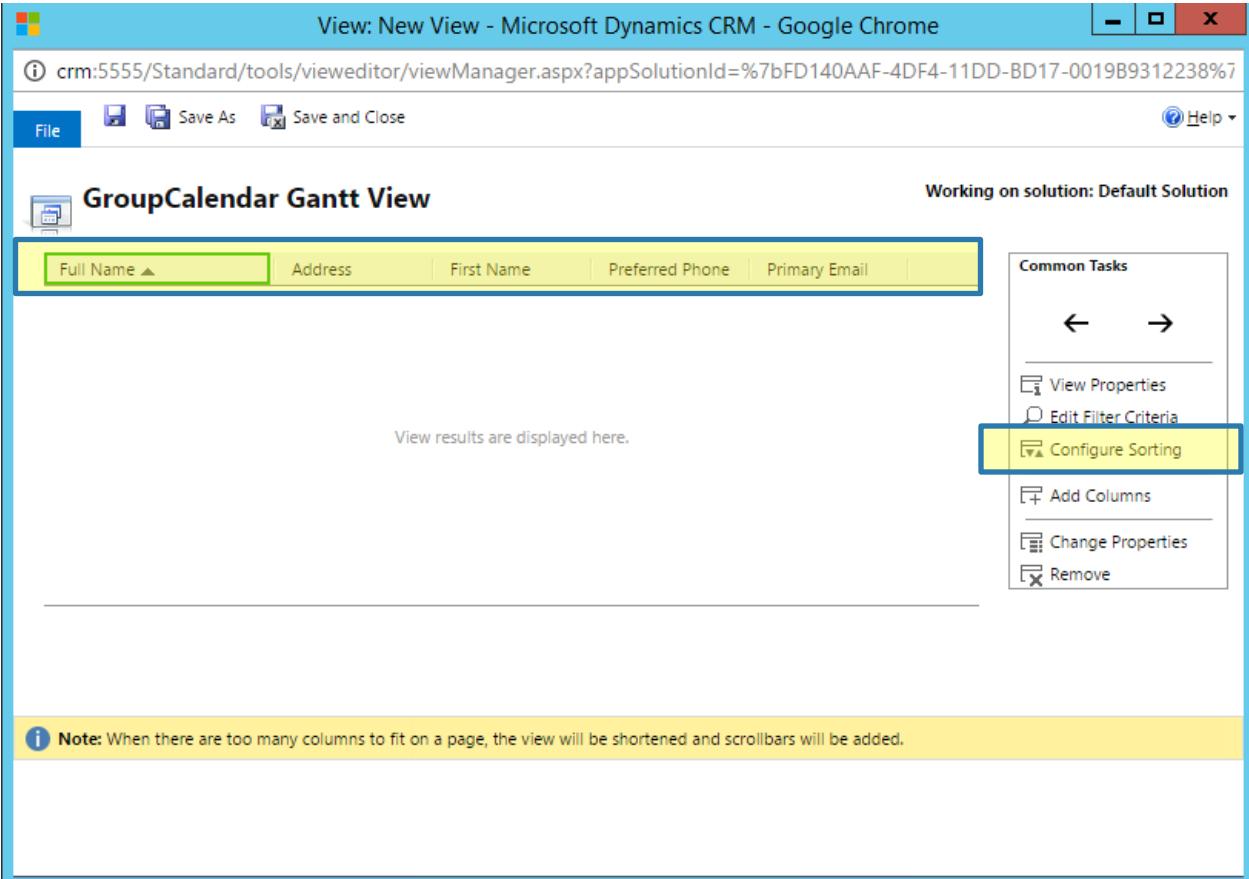


Figure 71: GroupCalendar – configure sorting of columns I

- 6) In the next window, you can configure the sorting of the boxes after the criteria shown in figure 65. Click on the [**OK**]-button in order to finish the process.

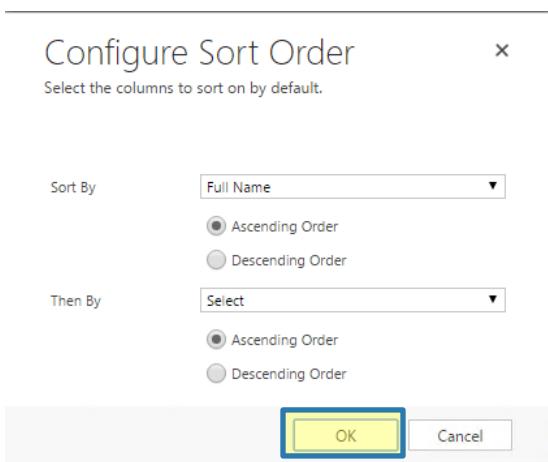


Figure 72: GroupCalendar – configure sorting of columns II

- 7) To proceed, you need the unique ID of your newly created view. To get it, simply copy your address bar to an editor or elsewhere. The unique ID is the highlighted part of the example address bar below:

<http://crm:5555/Std/tools/vieweditor/viewManager.aspx?appSolutionId=%7bFD140AAF-4DF4-11DD-BD17-0019B9312238%7d&entityId=%7b60696D5D-4D78-4712-B4E0-6CBEF3DF4906%7d&mode=new&objectTypeCode=8#>

- 8) With the so received unique ID, create a new SettingsKey named GanttUserTemplateId. For further information on how to create a settingskey in GC, have a look at [CHAPTER 4 GROUPCALENDAR SETTINGS ON PAGE 28](#) or read [this post](#) on our blog.

The settings of the new SettingsKey are as follows:

Name: GanttUserTemplateID

KeyValue: unique view ID

IsCached: YES

10.4 How to show working hours and Time-Off

It is possible to show working hours and time off (e.g. holidays) for each resource and user in GroupCalendar. The feature is not enabled per default, but it can be enabled easily. Simply create a new EnableWorkingHours settingskey as shown below in order to enable the functionality.

First of all, you will have to create a new settingskey. If you haven't created a settingskey yet, please read this [blog article](#). Please enter the following values:

Name*: EnableWorkingHours

IsCached*: Yes

KeyValue: true

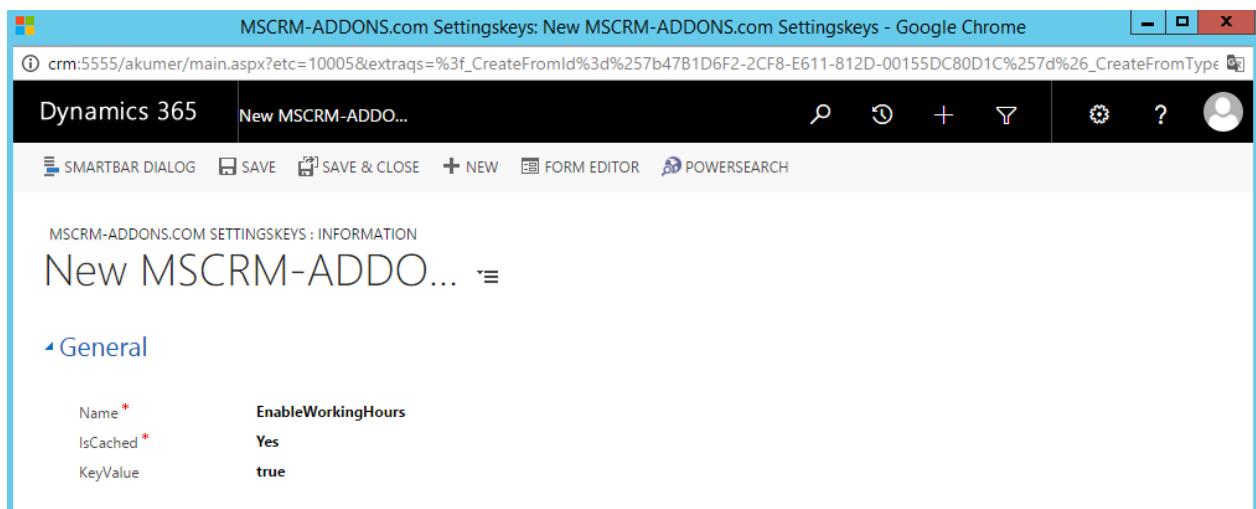


Figure 73: New settingskey

Do not forget to save the settingskey!

To apply the changes, you have to run a IISRESET on the CRM server.

Optionally, you may restart the GroupCalenderServer Application Pool within IIS on the CRM server.

Next, navigate to Settings > Security > users and select a user there. Then, click on Work Hours in the users' overview.

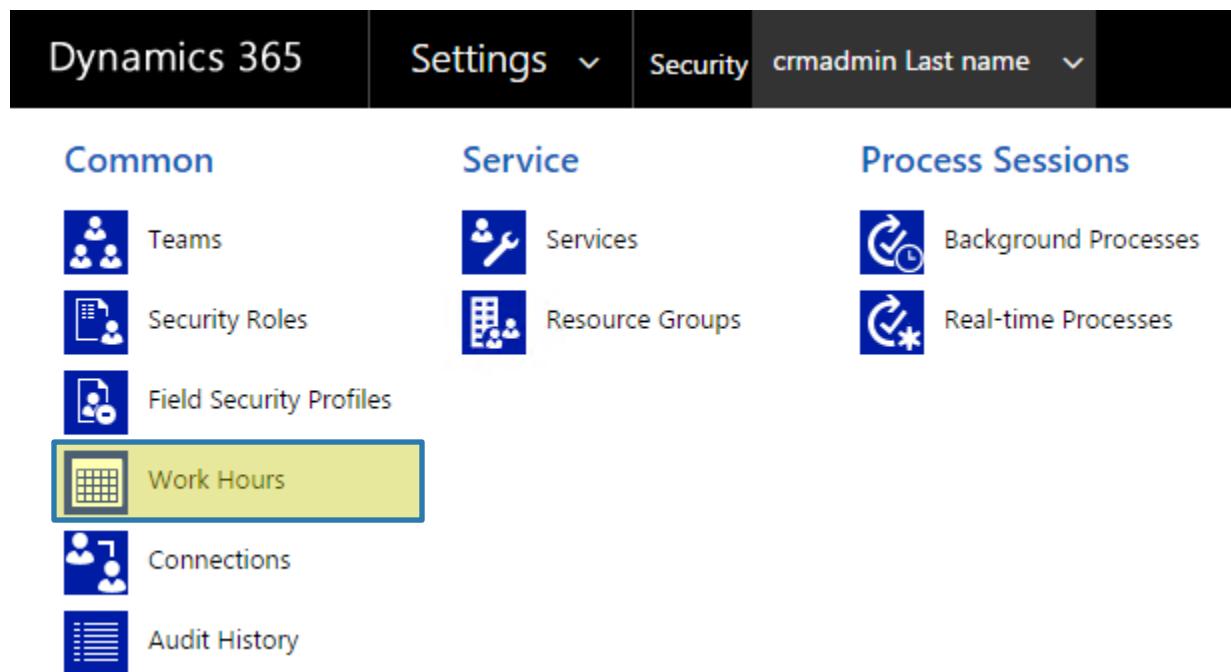


Figure 74: Open the work hours surface

In the so opened surface, open the drop down menu next to the **[Set up]-button** ① and set your working hour schedule ② in the so opened window. Once saved, your changes will apply to GroupCalendar.

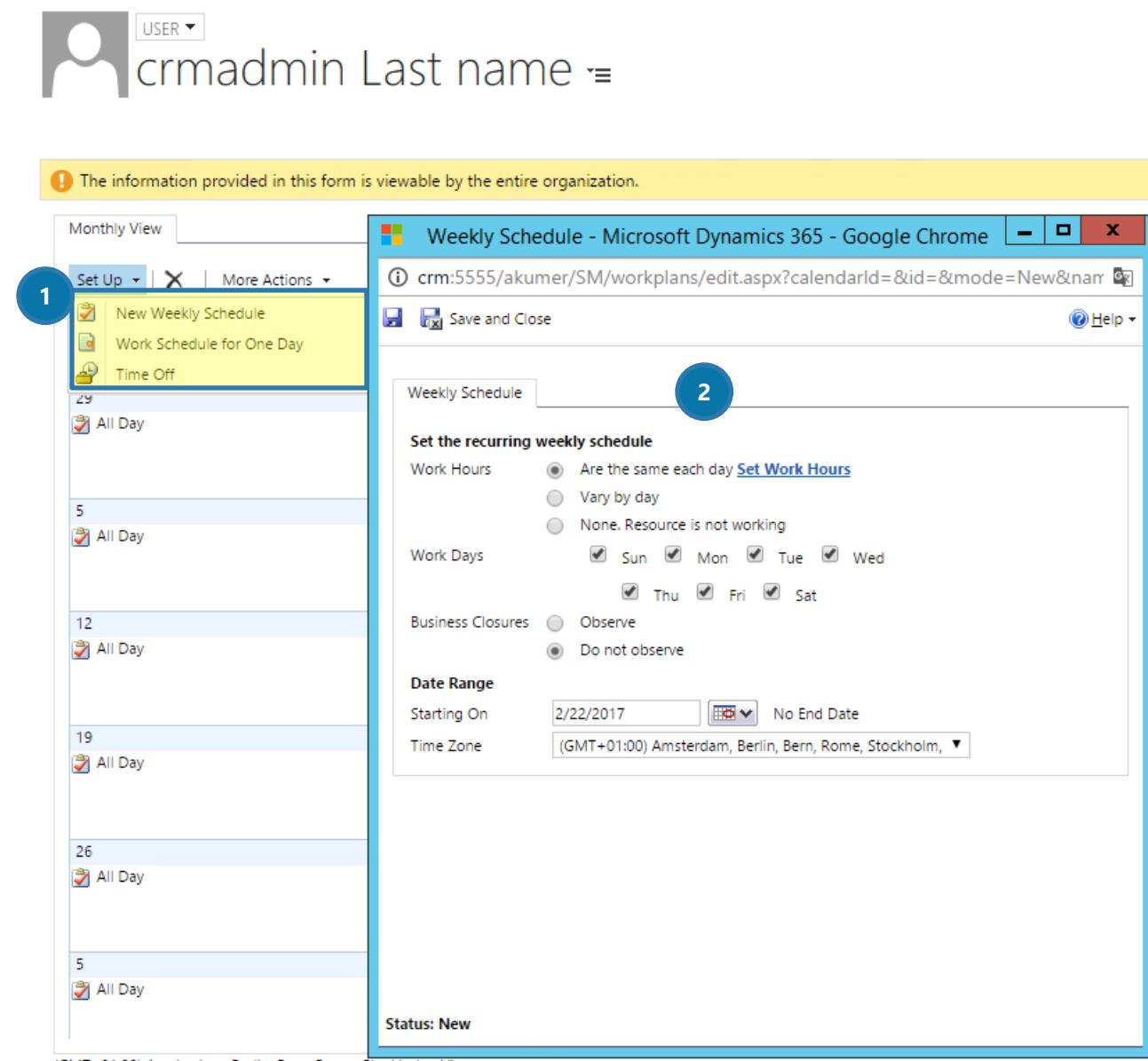


Figure 75: Open the work hours surface

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Figure 75: Open the work hours surface	73

12 Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact support@mscrm-addons.com.

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