



mscrm-addons.com
GroupCalendar for MS CRM 2013

GroupCalendar for MS CRM 2013

Version 6.5 - March 2014

Installation Guide
(How to install/uninstall GroupCalendar for MS CRM 2013)

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1 Common Information

Before installing GroupCalendar for MS CRM 2013, please read this document and follow the steps carefully.

1.1 Intended Audience

This guide is intended for system administrators who are familiar with the following administrative tasks:

- Maintaining and configuring SQL Server databases
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM Server

2 License

The product comes with a 14-days trial license.

Information about licensing can be found on www.mscrm-addons.com

3 Prerequisites

3.1 Microsoft .NET Framework 4.0 RTM is required

The RTM version of Microsoft .NET Framework 4.0 is required. Client Runtime is not sufficient.

3.2 Supported CRM Versions

- On-premises editions of Microsoft Dynamics CRM Server 2013
- Microsoft Dynamics CRM Online – for more information please read our blog article: <http://blogs.mscrm-addons.com/post/2011/12/16/Install-GroupCalendar-for-MS-CRM-2011-Online.aspx>

3.3 Windows Identity Foundation

Will be installed as a part of the GroupCalendar Server Setup.

3.4 Supported Operating Systems

Windows Server 2012

Windows Server 2008 64bit

Windows Server 2008 R2 64bit

3.5 ISS 7 required

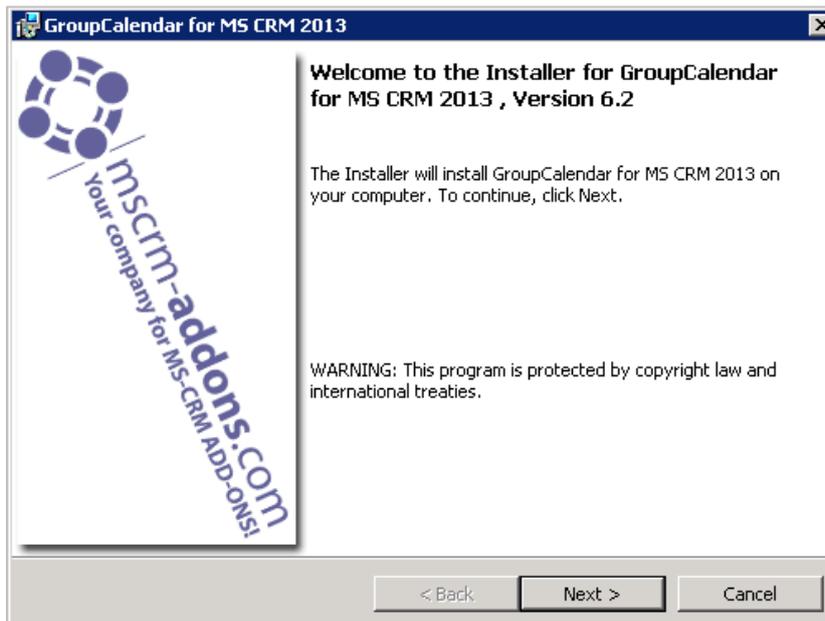
GroupCalendar will create a new Website on Your IIS 7, IIS7 must be present on the OS GroupCalendar is installed.

4 Installation GroupCalendar

During the installation you have to specify at least one organization in which GroupCalendar will be installed.

4.1 Introduction

Click „NEXT“ on the Welcome-Page.



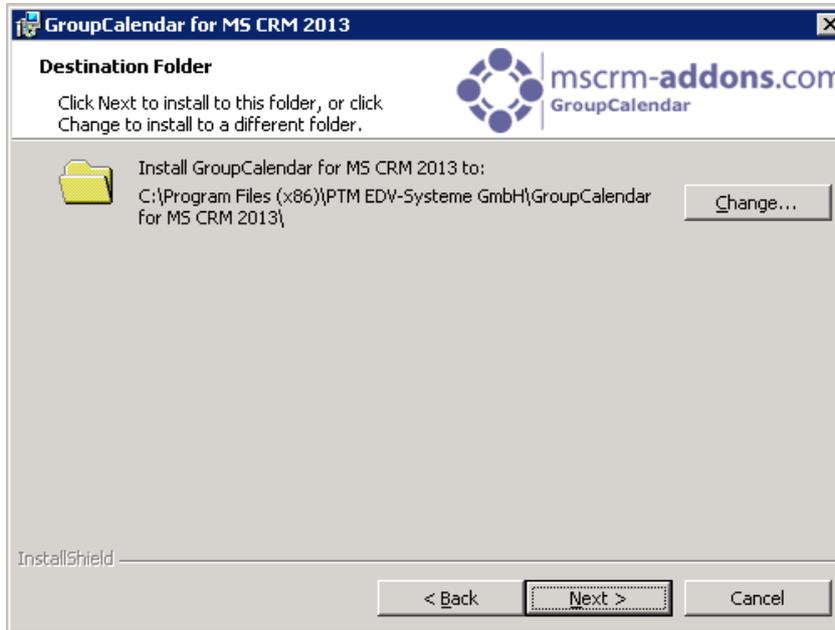
4.2 EULA (End User License Agreement)



You have to accept the license and click „NEXT“

4.3 Folder Selection

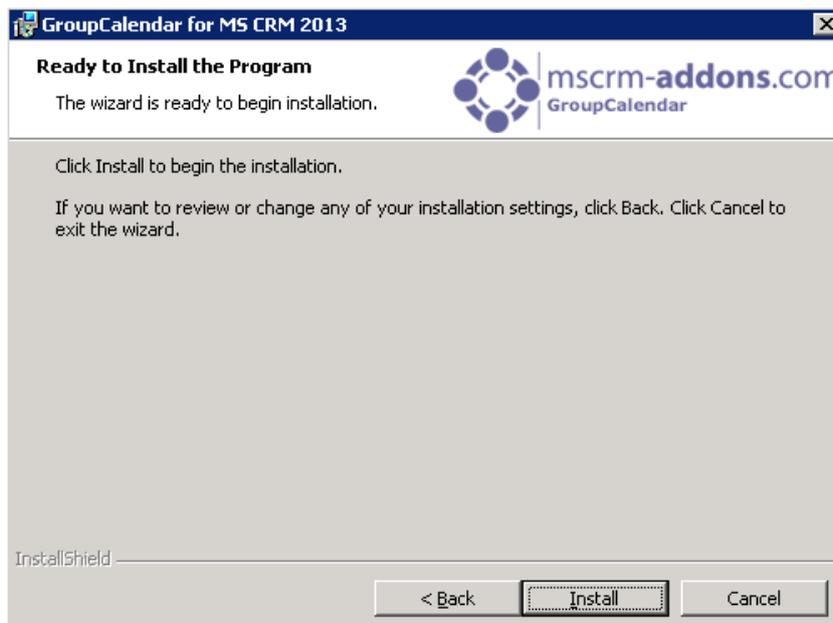
Choose the installation folder:



Click [Change] to specify a different installation path.

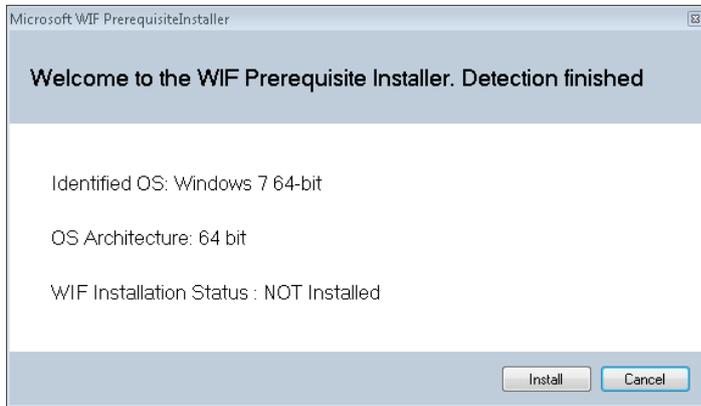
4.4. Confirm Installation

To start installing the GroupCalendar click „NEXT“:



4.5 Install Windows Identity Foundation

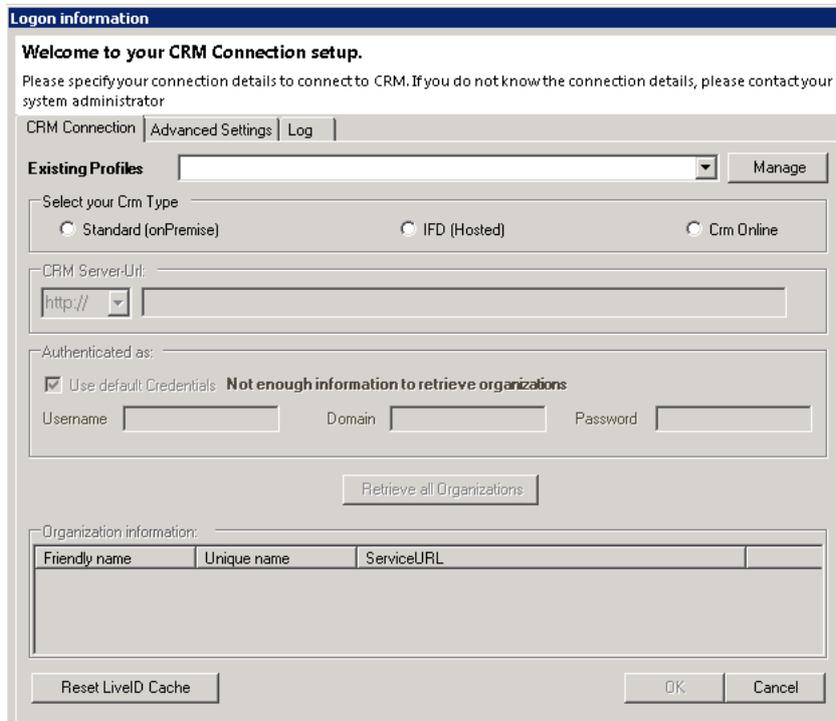
To use GroupCalendar for MS CRM 2013 you have to install the Windows Identity Foundation. If Windows Identity Foundation is not installed, this dialog will be shown automatically during installation.



4.6 Configure CRM Server

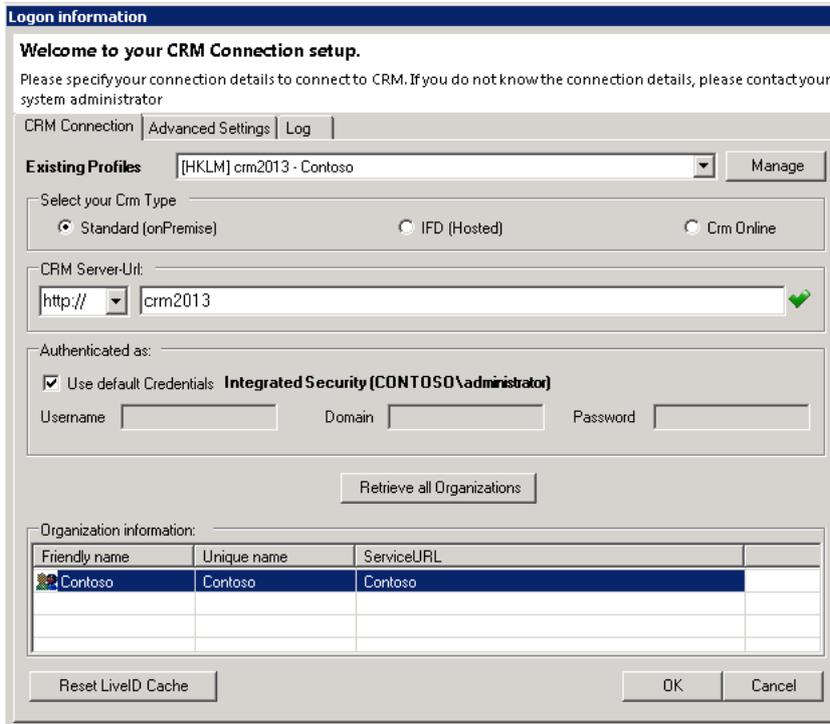
To configure your CRM Server, select your Profile or create a new profile and select your CRM Server type.

The IFD configuration has to be done, if your CRM is configured for that. For more information please click [here](#).



Choose the server path and add your login credentials by filling in the field's username, password and domain or choose the default credentials.

As soon as the Organizations are retrieved press the "OK"-button.



Logon information

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

CRM Connection | Advanced Settings | Log

Existing Profiles: [HKLM] crm2013 - Contoso [Manage]

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

CRM Server-Url:
 http:// [crm2013] ✓

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

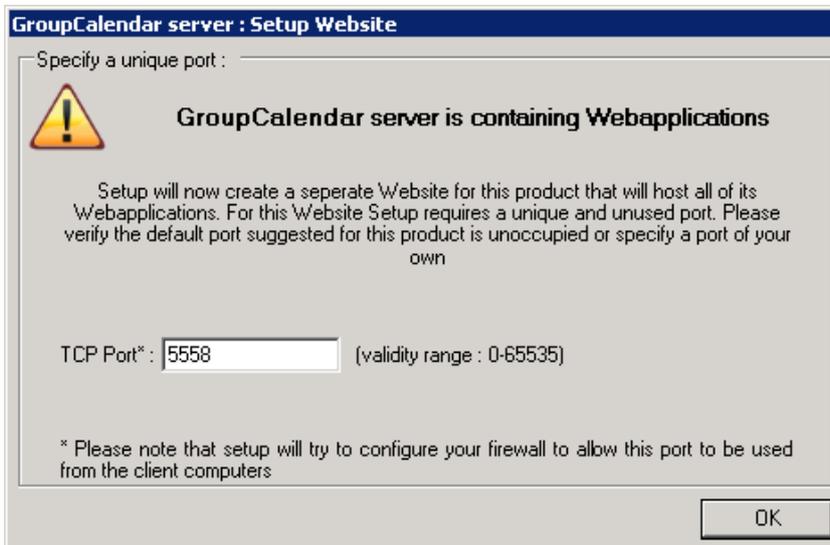
[Retrieve all Organizations]

Organization information:

Friendly name	Unique name	ServiceURL
Contoso	Contoso	Contoso

[Reset LiveID Cache] [OK] [Cancel]

4.7 Server: Setup Website



GroupCalendar server : Setup Website

Specify a unique port :

 **GroupCalendar server is containing Webapplications**

Setup will now create a separate Website for this product that will host all of its Webapplications. For this Website Setup requires a unique and unused port. Please verify the default port suggested for this product is unoccupied or specify a port of your own

TCP Port* : [5558] (validity range : 0-65535)

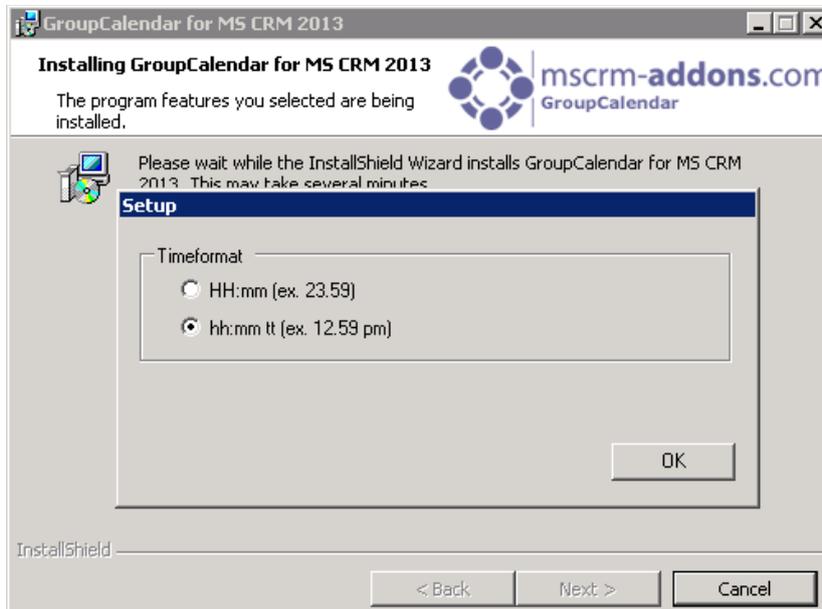
* Please note that setup will try to configure your firewall to allow this port to be used from the client computers

[OK]

GroupCalendar will create a new Website on Your IIS 7, IIS7 must be present on the OS GroupCalendar is installed.

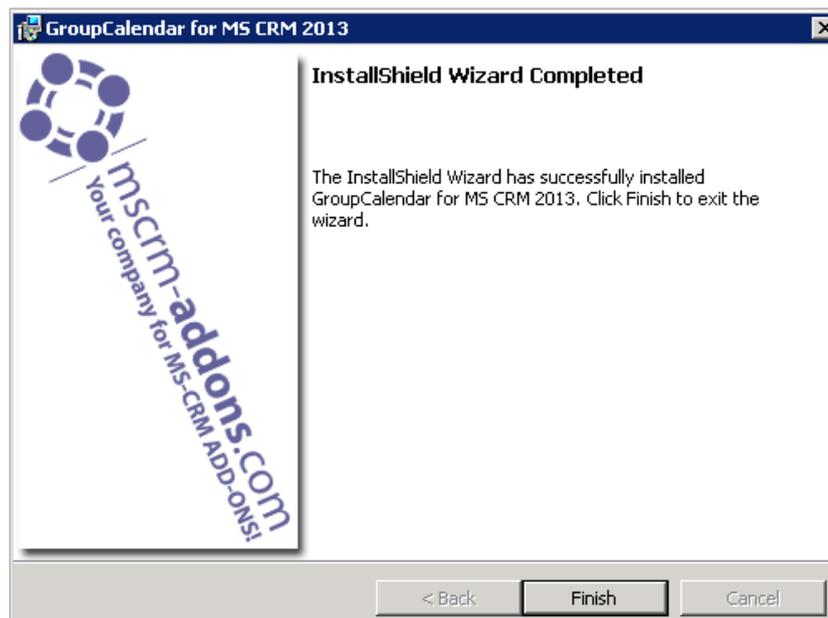
4.8 Time Format

Select the Time Format which should be used by GroupCalendar



4.9 Finish

Installation is finished.



5 Security Roles

General securityroles for all products:

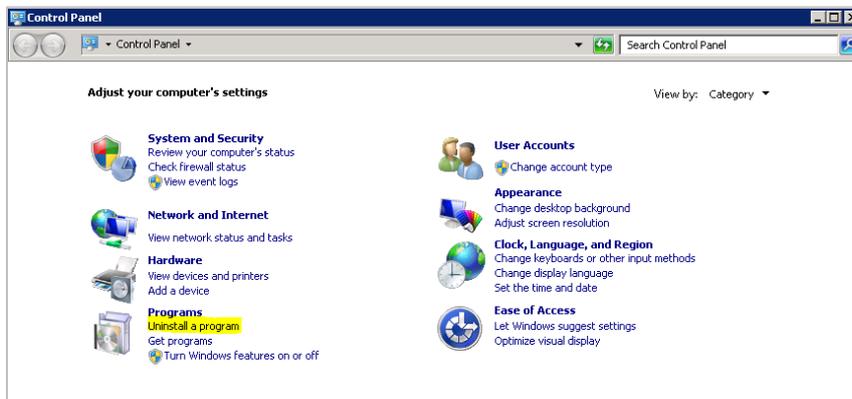
The following securityrole is required by all our products:

- MSCRM-Addons General Security Role

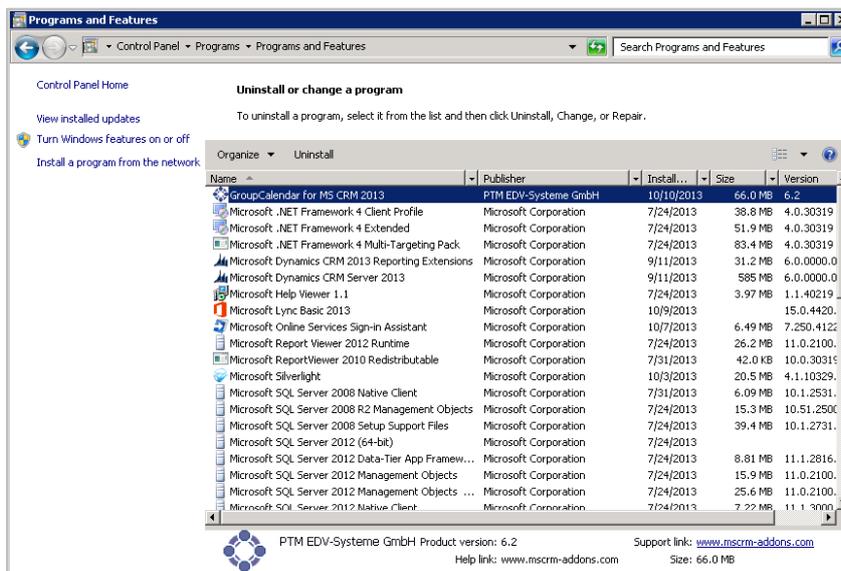
This security role contains the basic requirements for using the product itself and to be able to perform the licensecheck.

6 Uninstall GroupCalendar

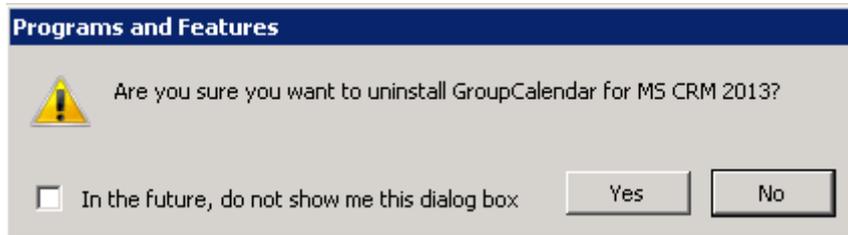
To uninstall GroupCalendar, open "Uninstall a program" in the Control Panel



Find "GroupCalendar for MS CRM 2013", select it and click on "Uninstall"



Confirm the question if you're sure to uninstall GroupCalendar for MS CRM 2013. Click on [No] if you don't want to uninstall GroupCalendar for MS CRM 2013.

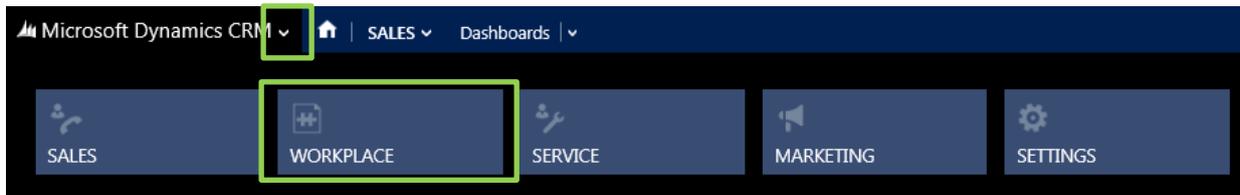


It may take a few minutes to uninstall GroupCalendar.

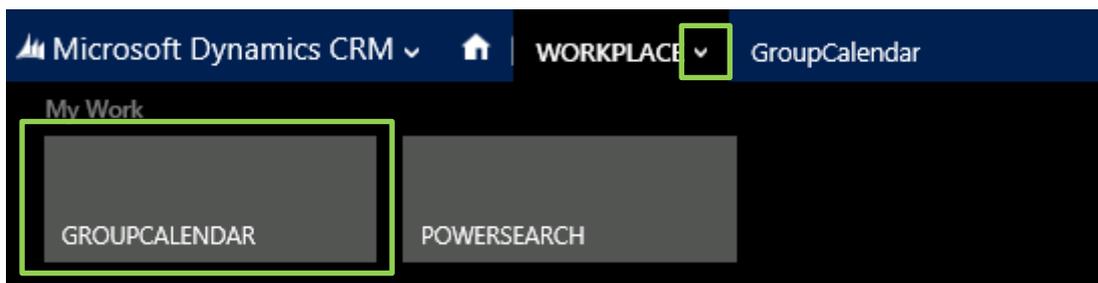
6 Testing the Installation

Open MS CRM and follow the steps in the next screenshots to get to your GroupCalendar:

Open your MS CRM and click on the dropdown-button next to "Microsoft Dynamics CRM" and go to "Workplace"



Click on the new "Workplace"-dropdown button in the ribbon and you can see your GroupCalendar for MS CRM 2013



Another way is to open the Internet Explorer and open:

http://SERVER:PORT/ORGANIZATION/WebResources/ptm_WebApplicationPreloaderGroupCalendar

7 Installing GroupCalendar, Activity Tools and DocumentsCorePack in an IFD/Claims-based-Environment

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

1. IFD-Tool -<http://www.mscrm-addons.com/Downloads/DownloadIFDToolforMSCRM2011/tabid/195/ctl/Login/Default.aspx?returnurl=%2fDownloads%2fDownloadIFDToolforMSCRM2011%2ftabid%2f195%2fDefault.aspx>
you need to have a login on our web site
2. For installing GroupCalendar you need at least version 5.12 from our download Section:
<http://www.mscrm-addons.com/Downloads/tabid/32/Default.aspx>
3. For installing ActivityTools you need at least version 5.13 from our download Section:
<http://www.mscrm-addons.com/Downloads/tabid/32/Default.aspx>
4. For installing DocumentsCorePack you need at least version 5.18 from our download Section:
<http://www.mscrm-addons.com/Downloads/tabid/32/Default.aspx>

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

More details on how to configure MSCRM for IFD/Claims can be found in the Microsoft Guide "Configuring Claims-based Authentication for Microsoft Dynamics CRM 2013" download:
<http://www.microsoft.com/en-us/download/details.aspx?id=3621>

The following system configuration is the basis for our guide. Your setup will differ in these URLs, make sure you are replacing the URLs with your own URLs when following the guide.

Internal Url used to access Microsoft Dynamics CRM:

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

External Url used to access Microsoft Dynamics CRM:

<https://orgname1.rc1ifd.ptm-edv.at>

AD FS Server:

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

The Addon itself also requires a dns name:

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

or

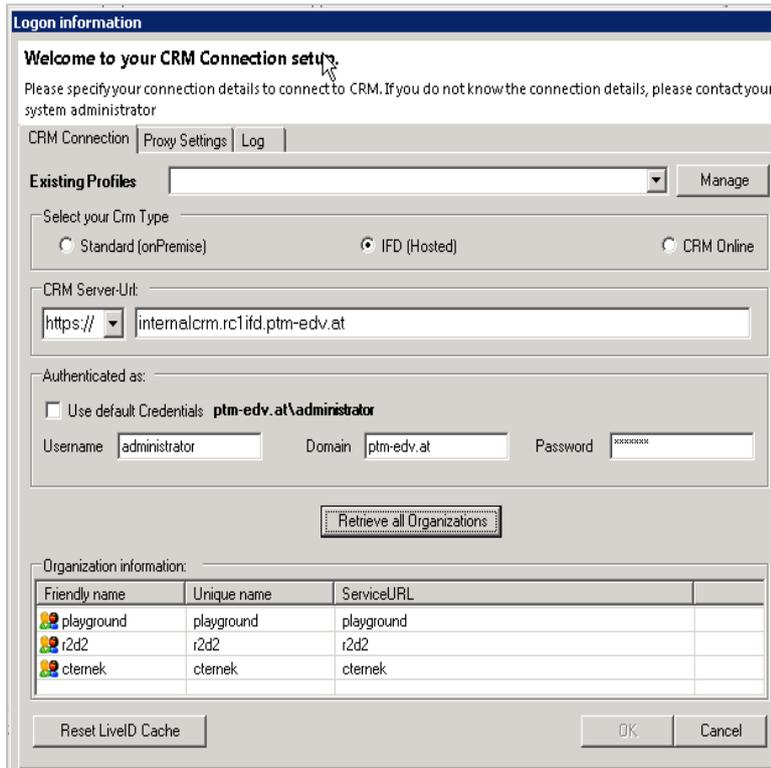
<https://groupcalendarserver.rc1ifd.ptm-edv.at>

or

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

Basic installation/configuration of our Add-On:

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



Logon information

Welcome to your CRM Connection setup.

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

CRM Connection | Proxy Settings | Log

Existing Profiles: [Dropdown] [Manage]

Select your Crm Type

Standard (onPremise) IFD (Hosted) CRM Online

CRM Server-Url:

[Protocol: https://] [internalcrm.rc1ifd.ptm-edv.at]

Authenticated as:

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

Username: administrator Domain: ptm-edv.at Password: [Masked]

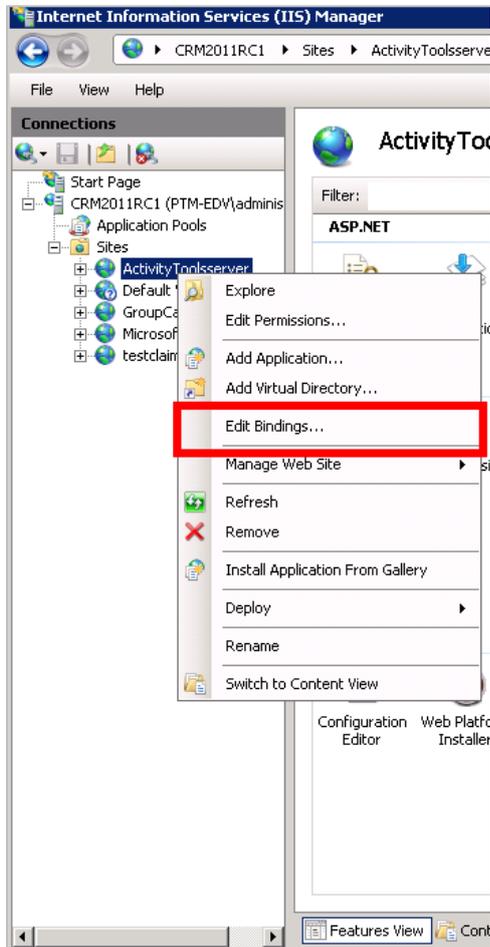
[Retrieve all Organizations]

Organization information:

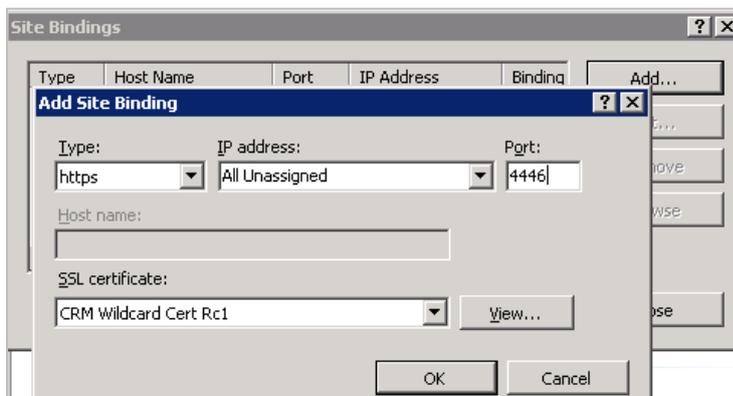
Friendly name	Unique name	ServiceURL
playground	playground	playground
r2d2	r2d2	r2d2
cternek	cternek	cternek

[Reset LiveID Cache] [OK] [Cancel]

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



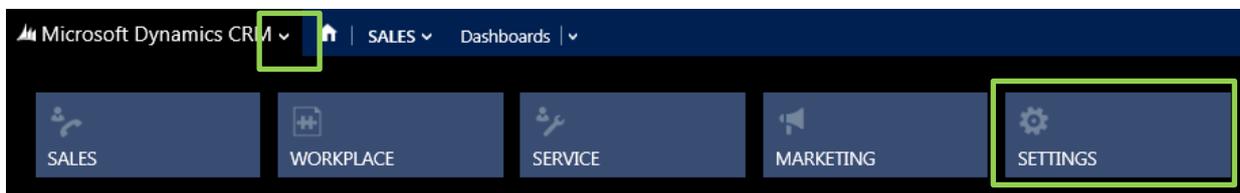
4. On the Bindings click on "Add..." and select in the "Add Site Binding" the type "https". You also have to specify the Port in our example we use 4446



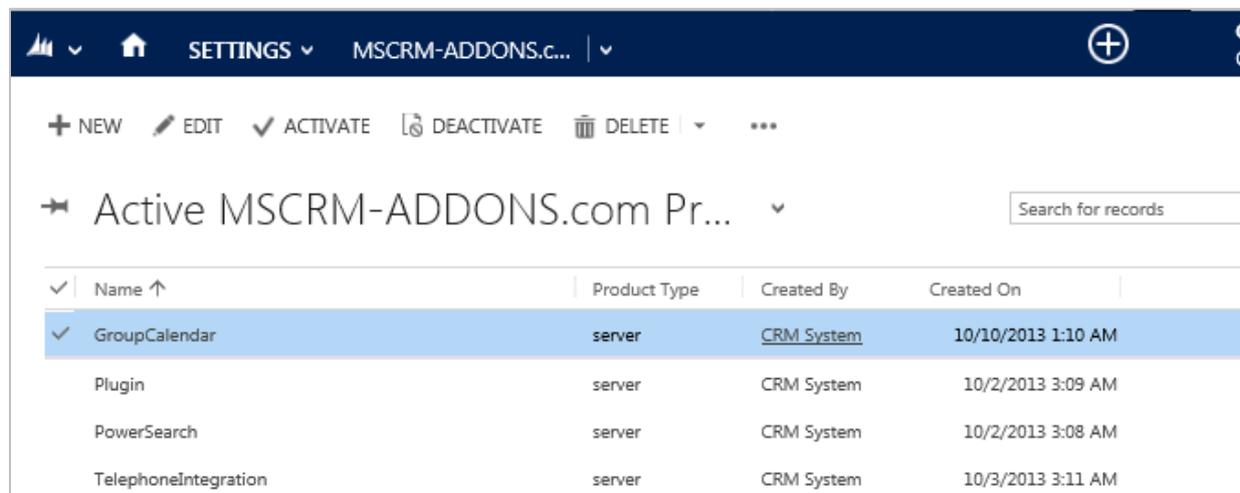
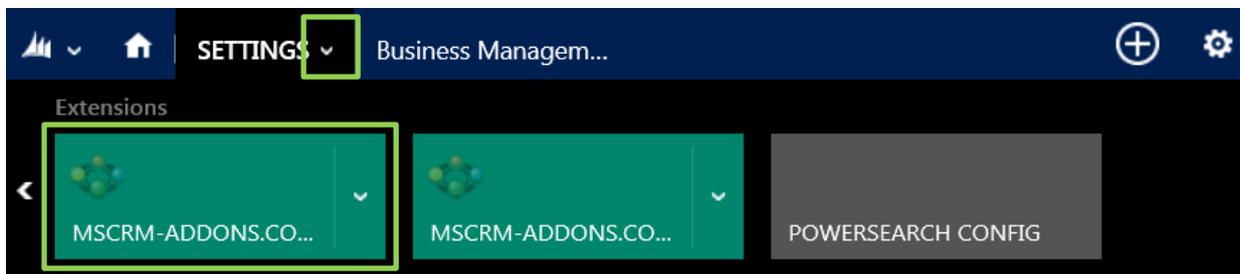
With that we have made the web site available for https. Click on OK.

5. Reselect the Addon website and double click on the "Authentication" item in the right side details pane. Verify that the options "Anonymous" and "ASP.Net Impersonation" settings are enabled.
6. The Addon url need to be added to your DNS Server. Your DNS-Servers have to resolve the activitytoolsserver.[your-domain] orgroupcalendarserver.[yourdomain] names correctly. This means they should resolve it with the same IP address as your CRM Server has. IF you are having an external DNS, make sure that both external and internal DNS are able to resolve the URL.
7. Extract the IFD-Tool (zip-File), that you downloaded before and execute theIFDSetupWizard.exe. Follow the steps in the IFD Setup carefully.
8. Open your CRM in Internet Explorer and follow the steps below:

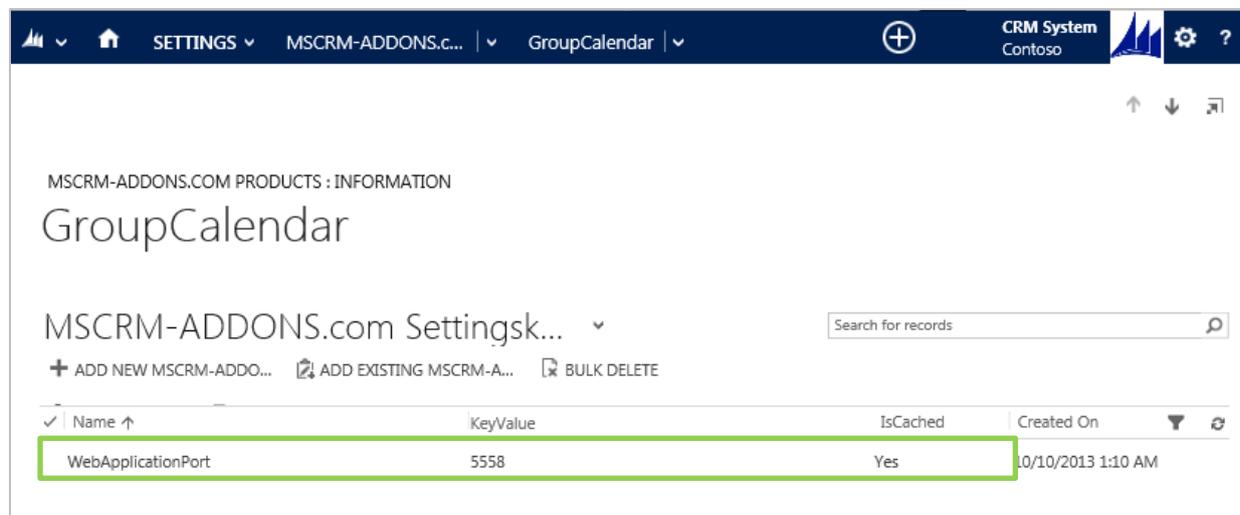
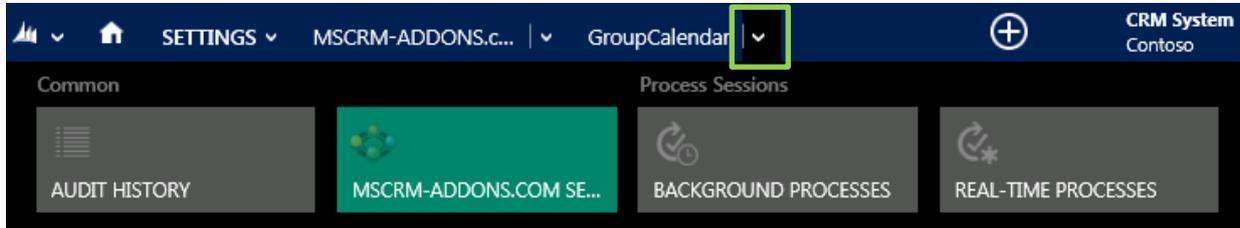
Go to "Microsoft Dynamics CRM" Logo on the left corner – click on Settings



Click again on "SETTINGS" - go to the "Extensions Area" then click on "MSCRM-ADDONS.com Products" and choose "GroupCalendar" within the mscmr-addons.com Product window. See next screenshots:



Choose GroupCalendar and click on the dropdown button next to "GroupCalendar" in the ribbon, open "MSCRM-ADDONS.COM SETTINGSKEYS" and search for the "WebbApplicationPort"-entry. See next screenshots:



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

We have finished the configuration of the CRM Part and now need to configure the AD FS.

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

This federation metadata is created with the IFD-Tool on the CRM Server. For example, <https://activitytoolsserver.rc1ifd.ptm-edv.at:4446/FederationMetadata/2007-06/FederationMetadata.xml>

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

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

14. Click Finish.
15. In the Rules Editor, click Add Rule,
16. In the Claim rule template list, select the Transform an Incoming Claimtemplate, and then click Next.
17. Create the following rule:
 - Claim rule name: Transform Windows Account Name to Name (or something descriptive)
 - Add the following mapping:
 - i. Incoming claim type: Windows account name
 - ii. Outgoing claim type: Name
 - iii. Pass through all claim values
18. Click Finish, and when you have created all three rules, click OK to close the Rules Editor.
19. You have finished the configuration and you should be able to use the Addon in your IFD/Claims Environment now.

Troubleshooting:
If you see this error:

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]
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(HttpRequest 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

Reason 1:

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

```
<issuerNameRegistry typetype="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 access rights problems with the certificates private key (Mainly an issue for self-signed certificates).

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

Checklist for general troubleshooting:

- Is the Setting WebApplicationPort still intact
- Are there any not http/https bindings in CRM
- Are there any not http/https bindings in the products website
- Is the DNS correctly resolving the products link
- Has the ConnectionProfile been created with IFD as connection type

If you have any questions regarding this article or troubles getting this to work or you want to give us some feedback please send an email to support@mscrm-addons.com

9 Install GroupCalendar for MS CRM 2013 online

If you purchased GroupCalendar, you need to follow the instructions below.

We'll not install GroupCalendar into your organization as a trial. For that, we have our own test organization environment where you can have a closer look at GroupCalendar for CRM 2013 Online.

Please click here to get details about how to connect to our CRM Online test-organization:

<http://www.mscrm-addons.com/TestouraddonswithCRMOnline/tabid/228/Default.aspx>

To install GroupCalendar 2013 Online, please follow the instructions in the blog article:

- [How to upgrade GroupCalendar for MS CRM 2011 for 2013](#)

CRM with Live ID

1. Please invite the Live ID mscrmaddonsazureservice@hotmail.com to your organization. The user must be system administrator so we could install GroupCalendar into your organization. If you don't have any users left, please disable temporary another user while the GC installation is finished.
2. We'll install GroupCalendar into your CRM 2013 Online organization. When we're finished, we'll send you an email so you could proceed with the next steps.
3. Please open the GroupCalendar Service User (the user you invited in step 1) under Settings -> Administration -> Users and run the workflow Set MSCRMAddons Service User to non-interactive for that user. This will set the user to a non-interactive access-mode so the user will not be counted for the CRM licensing.
4. We'll remove the system administrator role from that user. Please verify this just to make sure. We've created and assigned a new security role named MSCRMAddonsAzureService during the setup which covers the basic privileges for the service user.
5. Please open GroupCalendar in the CRM Navigation under Workplace -> My Work and verify if everything is working.

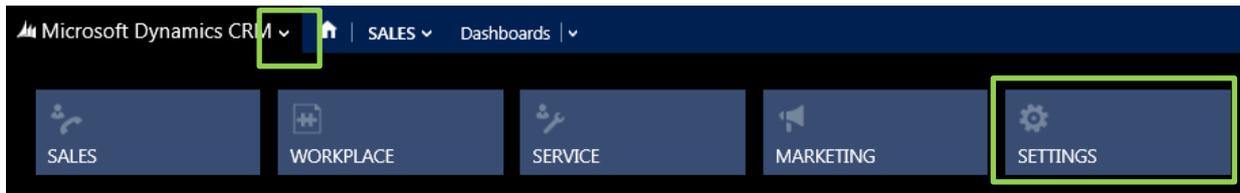
CRM with Office 365

1. You have to create a new user in your CRM organization / Office 365. The name is not that important. You could name it for example "mscrmaddonservice" or something like that. The user must be system administrator within CRM so we could install GroupCalendar into your organization. If you don't have any users left, please disable temporary another user while the GC installation is finished.
2. Please send us the username for the organization and also the temporary password to support@mscrm-addons.com. We'll change this password for security reasons because it will be transferred plain text via mail. During the creation of the user you also have the possibility to specify a mail address where the password should be sent. Please specify support@mscrm-addons.com. We recommend to use this method.
3. We will install GroupCalendar into your CRM 2013 Online organization. When we're finished, we'll send you an email so you could proceed with the next steps.
4. Please open the GroupCalendar Service User (the user you created in step 1) under Settings -> Administration -> Users and run the workflow Set MSCRMAddons Service User to non-interactive for that user. This will set the user to a non-interactive access-mode so the user will not be counted for the CRM licensing.
5. We will remove the system administrator role from that user. Please verify this just to make sure. We've created and assigned a new security role named MSCRMAddonsAzureService during the setup which covers the basic privileges for the service user.
6. Please open GroupCalendar in the CRM Navigation under Workplace -> My Work and verify if everything is working.

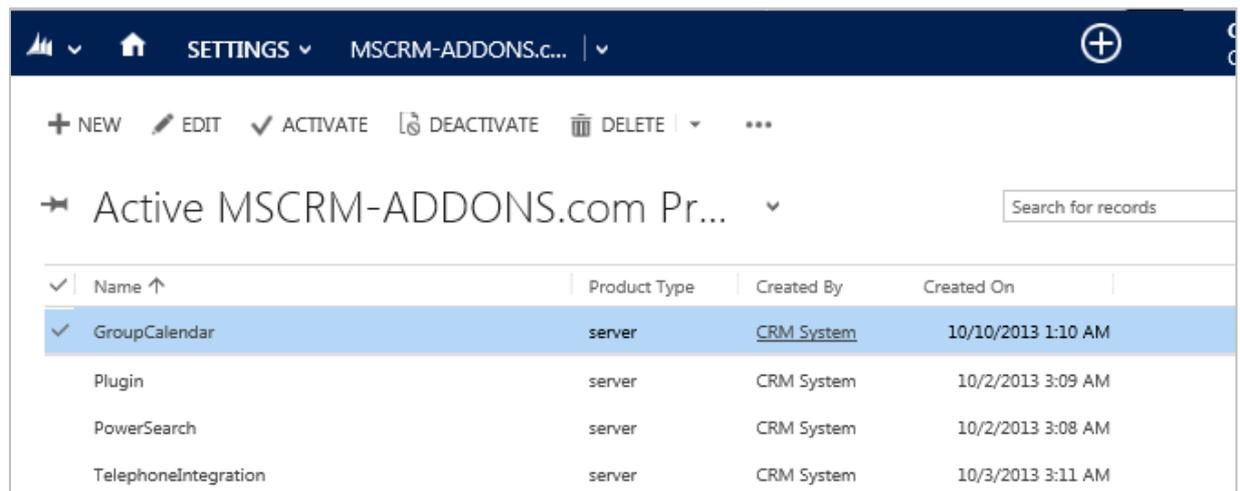
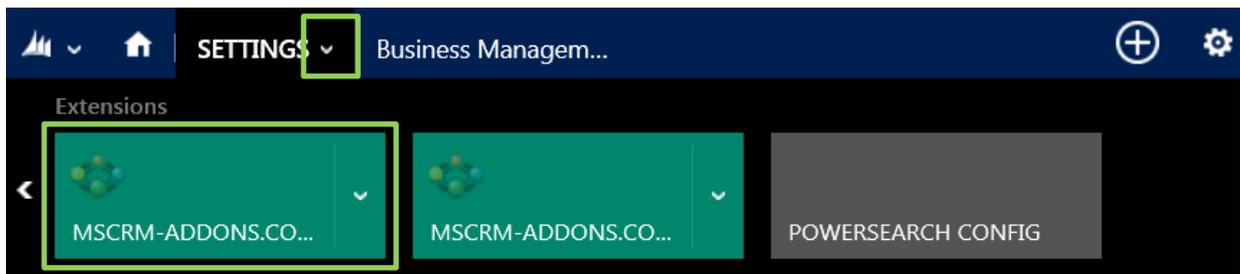
10 Configuration in Detail – GroupCalendar Settings

To configure the GroupCalendar, you have to open the GroupCalendar settings within CRM. To do this, please follow the steps below:

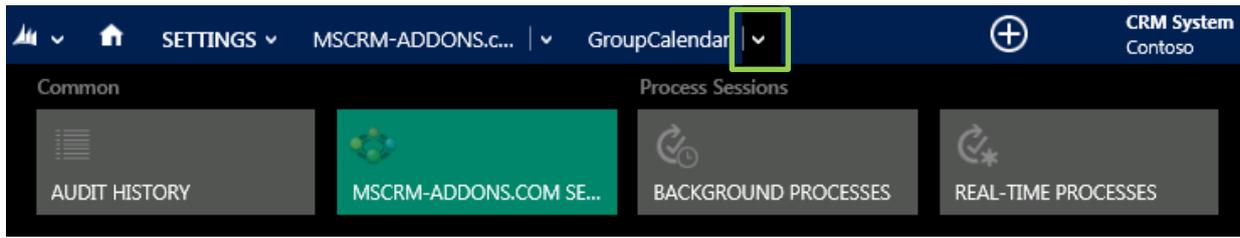
Go to “Microsoft Dynamics CRM” Logo on the left corner – click on Settings



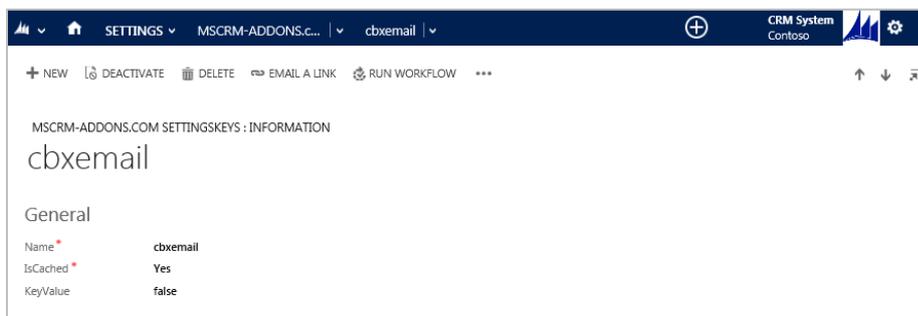
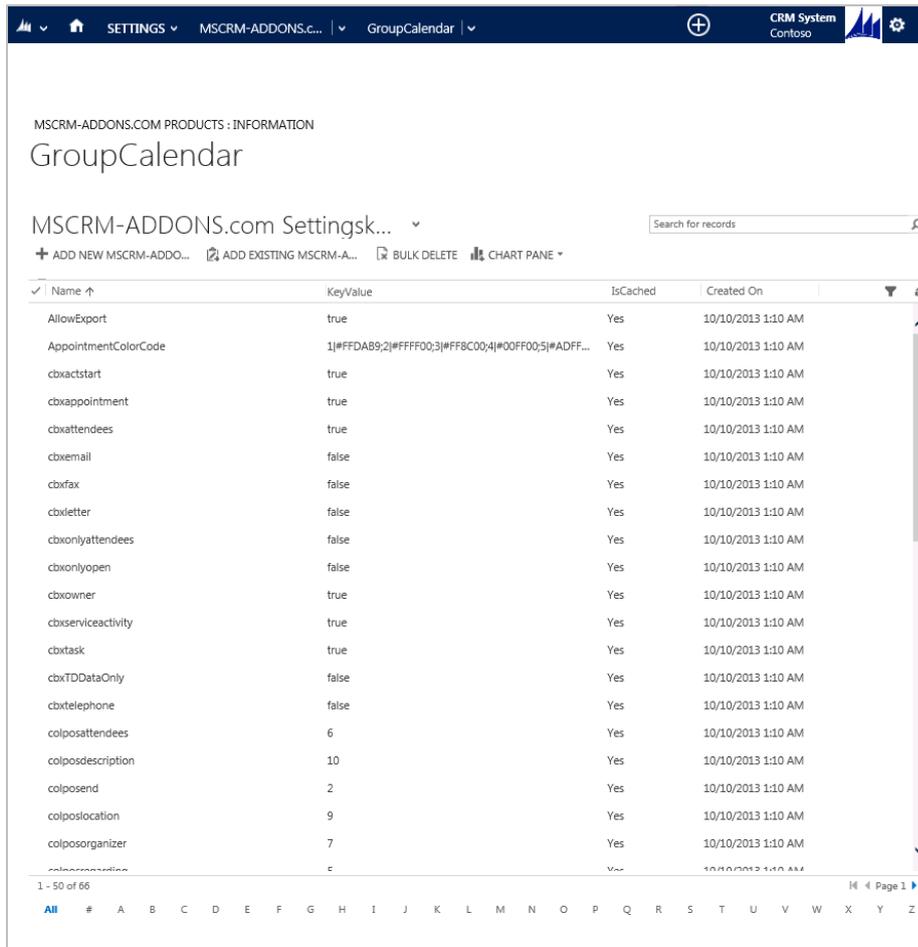
Click again on “SETTINGS” - go to the “Extensions Area” and click on “MSCRM-ADDONS.com Products” , go to the “Extensions”-area choose “GroupCalendar” within the mscmr-addons.com Product window. See next screenshots:



Choose GroupCalendar and click on the dropdown button next to “GroupCalendar” in the ribbon, open “MSCRM-ADDONS.COM SETTINGSKEYS”. All possible settings are located under “Settings Keys”.



Each setting could be modified if you click on it. See next screenshots:

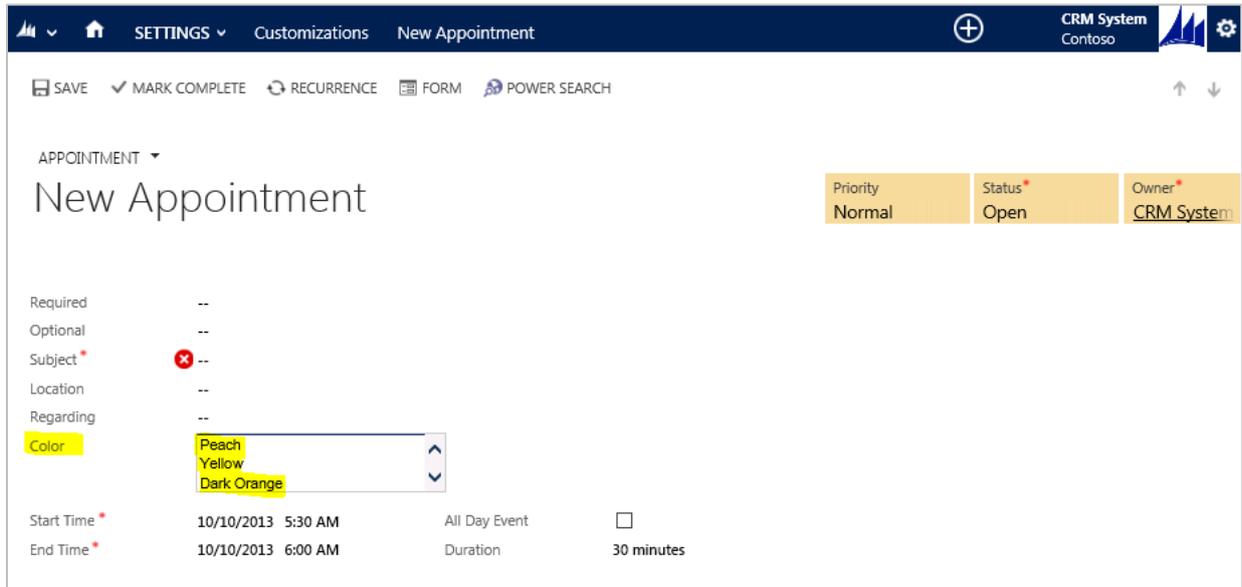


KEY	DESCRIPTION
Language	<p>en ... English de ... German fr ... French</p> <p>Per default the CRM User Language is used. But when this language does not exist for GC, the language configured here is used.</p> <p>Each label in the GroupCalendar can be customized. So it is no problem for you to add new 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“</p>
TimeFormat	<p>HH:mm ... 24Hour-Format(ex. 23:59) hh:mm tt ... 12Hour-Format (ex. 12:59pm)</p>
CalendarWeekRule	<p>Possible Values: - FirstDay - FirstFourDayWeek - FirstFullWeek</p> <p>Specifies the rule how the week number should be calculated</p>
ignoreStartDateTask ignoreStartDateLetter ignoreStartDateFax ignoreStartDateEmail ignoreStartDatePhonecall	<p>All fields identify, if the activity is shown on the due date (minus duration) only, or shown from start date to end date.</p> <p>Possible Values: - true: Activity is shown from due date minus duration till due date - false: activity is shown from start date till due date</p>
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
cbxonlyattendeeds	Default-value for the checkbox ONLYATTENDEES
cbxonlyopen	Default-value for the checkbox ONLYOPEN
ShowAllActivities	Shows all activities a user is allowed to see.
cbxattendeeds	Show Attendees/Regarding Columns
cbxactstart	use only the actual start field for searching
cbxowner	Show OwnerColumn

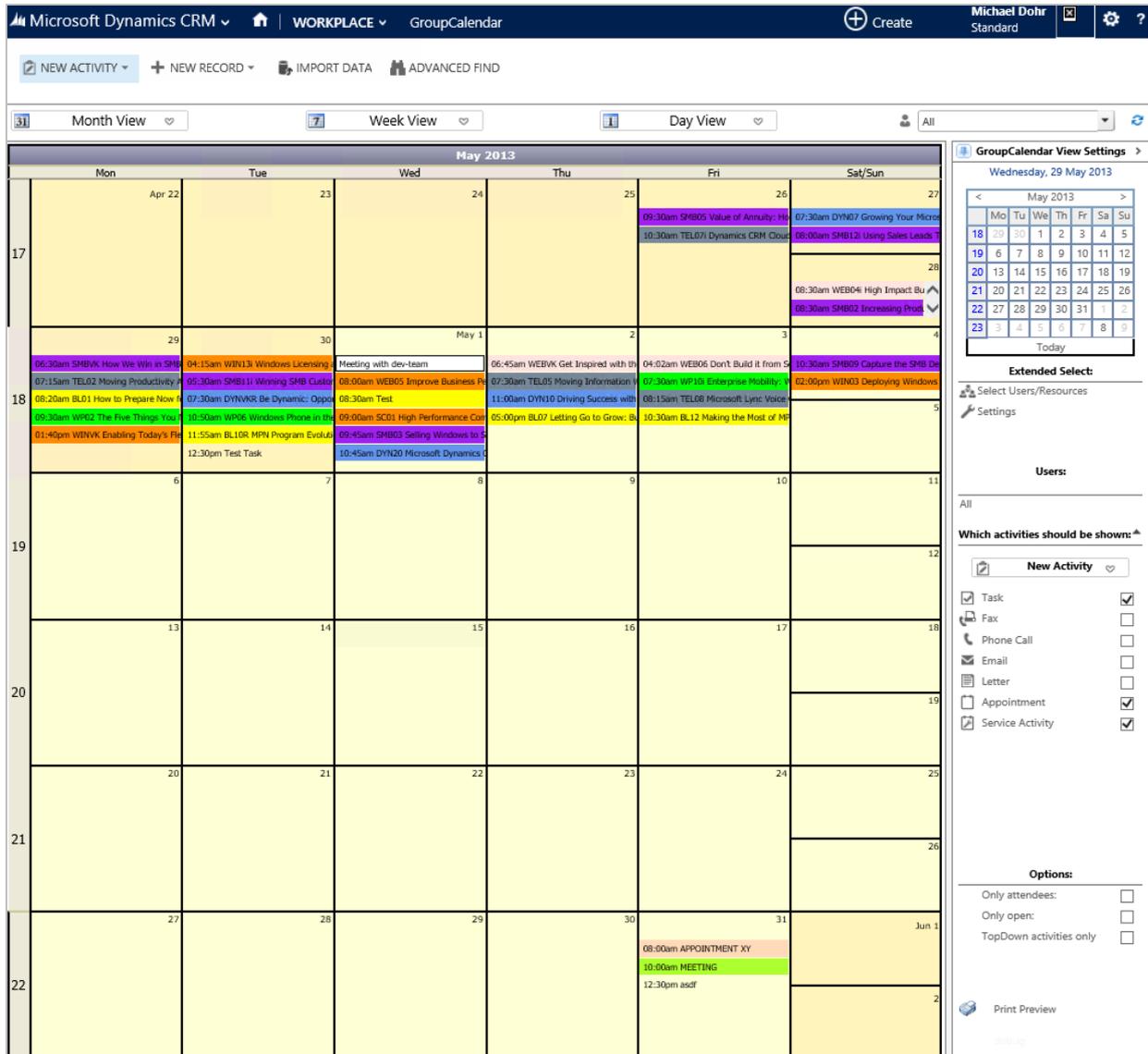
KEY	DESCRIPTION
DoNotShowWebCombo	You could disable the WebCombo for the users, teams and advanced finds. This makes sense when you have a really large number of users and teams. It could slow down GC drastically. You could then select users/teams via the advanced user select dialog
hourSections	You 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

10.1 Color-coding-functionality for all activities

GroupCalendar for MS Dynamics CRM 2013 provides the possibility to define a specific color for each activity. After activating this functionality in the CRM settings, GroupCalendar offers you the possibility to choose a color when scheduling an activity from a drop-down-menu within the activity-entity. (See screenshot below)



After selecting the color, saving the activity and refreshing the GroupCalendar, the scheduled activity is displayed in the chosen color in all GroupCalendar views. (See screenshot below)



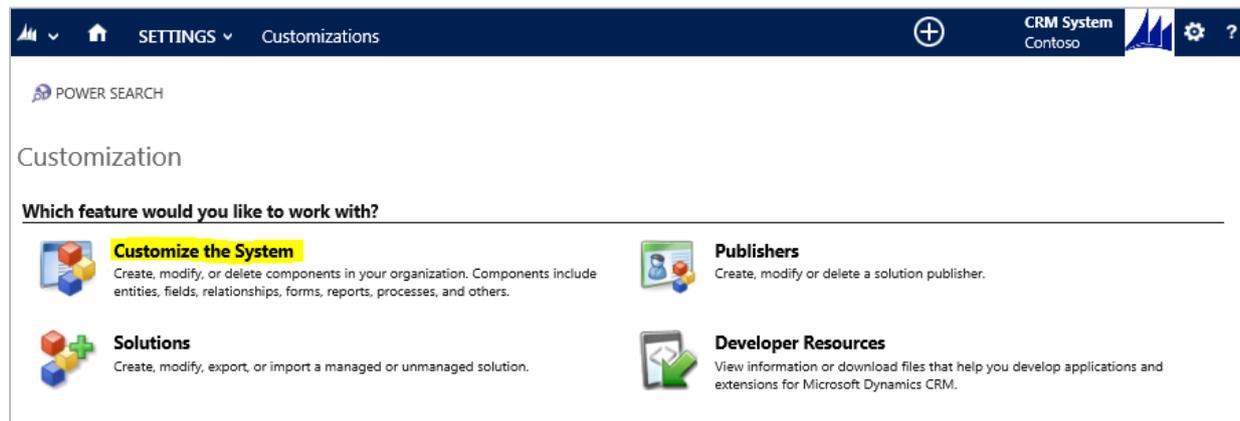
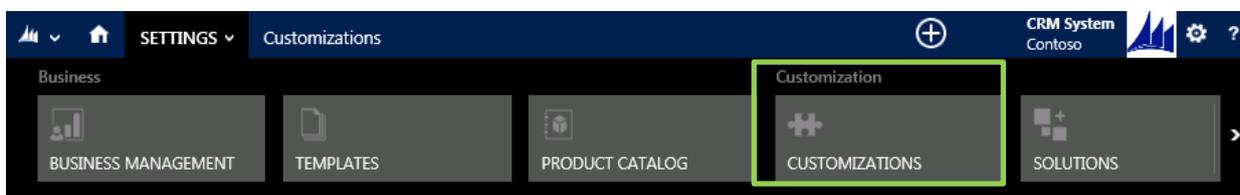
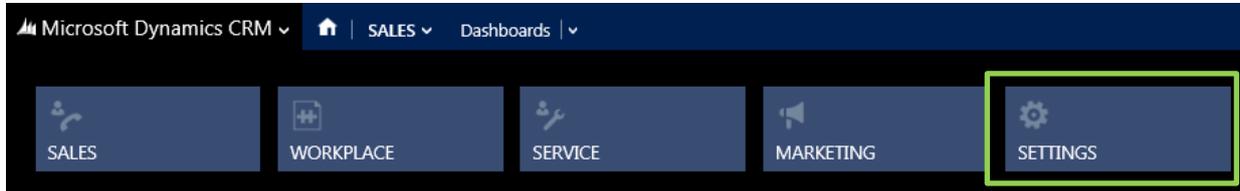
How to activate the color-coding-functionality for activities:

To activate color-coding-functionality, you have to add this attribute to the main form of the activity-entity. The attribute is named "ptm_colorcode2011" with the display name "Color". It is predefined with 12 colors, but you have the possibility to add additional colors (described in this article further below).

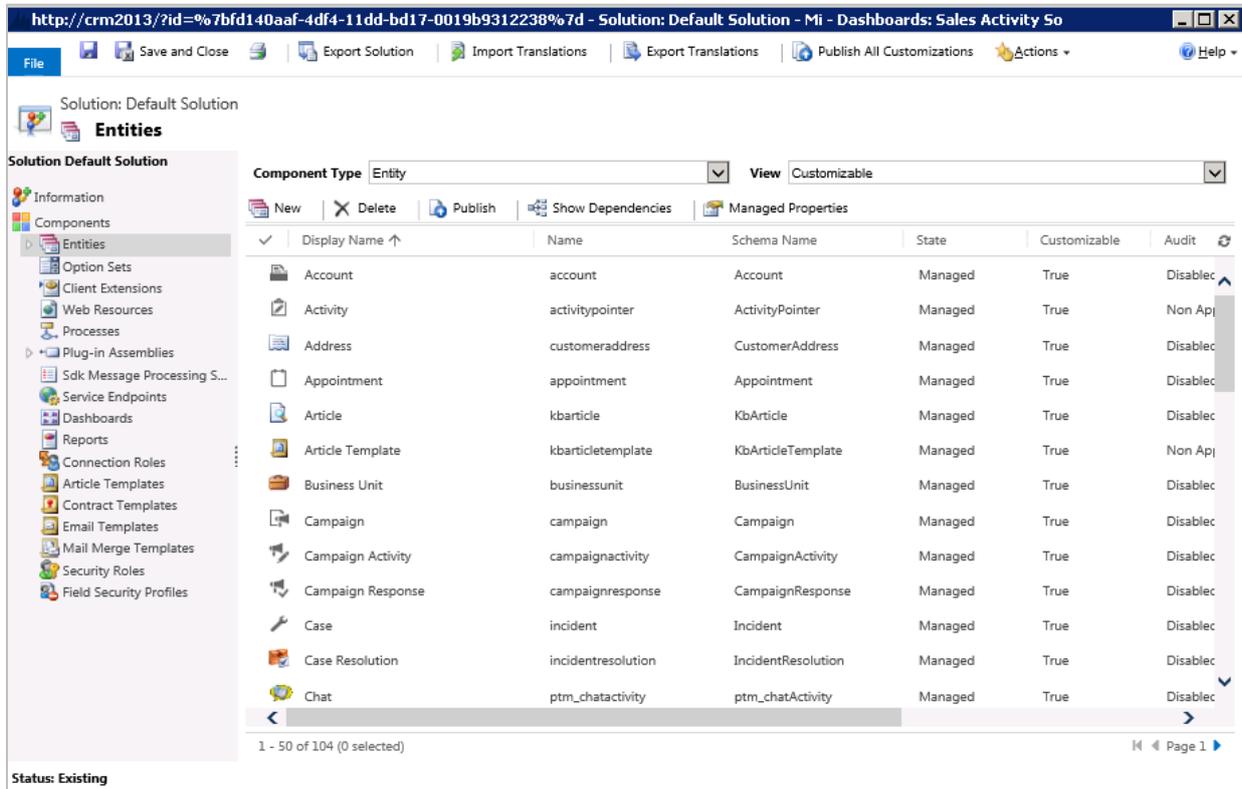
Please follow the simple steps below to activate the functionality.

NOTE: The example below describes how to activate the color-coding-functionality for the appointment-entity. In order to add this functionality to the other entities, follow the same procedure (steps 1-7) with the exception of choosing the other activity type instead of 'Appointment' within the 'customize the system' area of the CRM settings (for details see step 3).

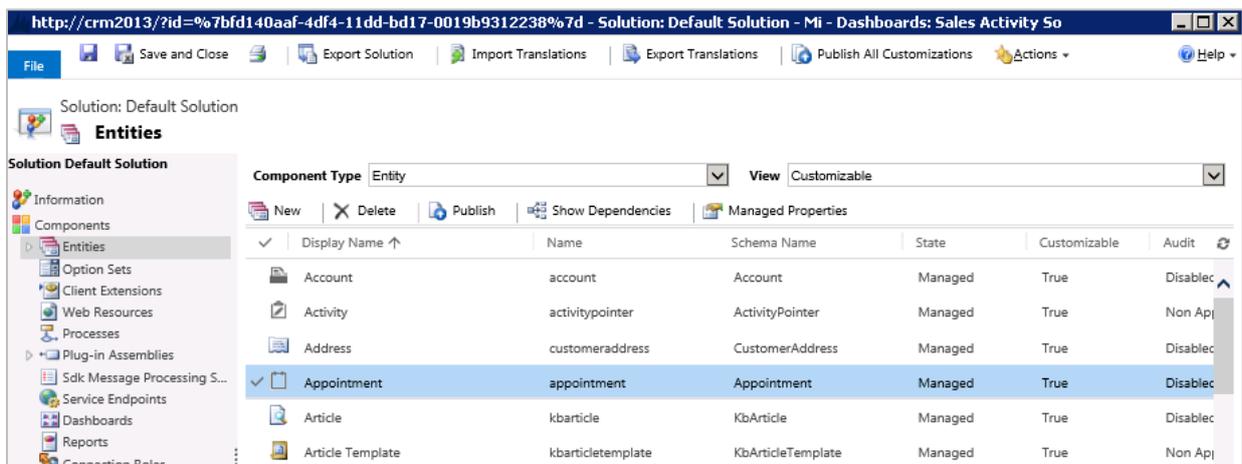
1. Open your CRM and go to 'Settings'. Afterwards, click on 'Customization' and click on 'Customize the System'. (See screenshots below):



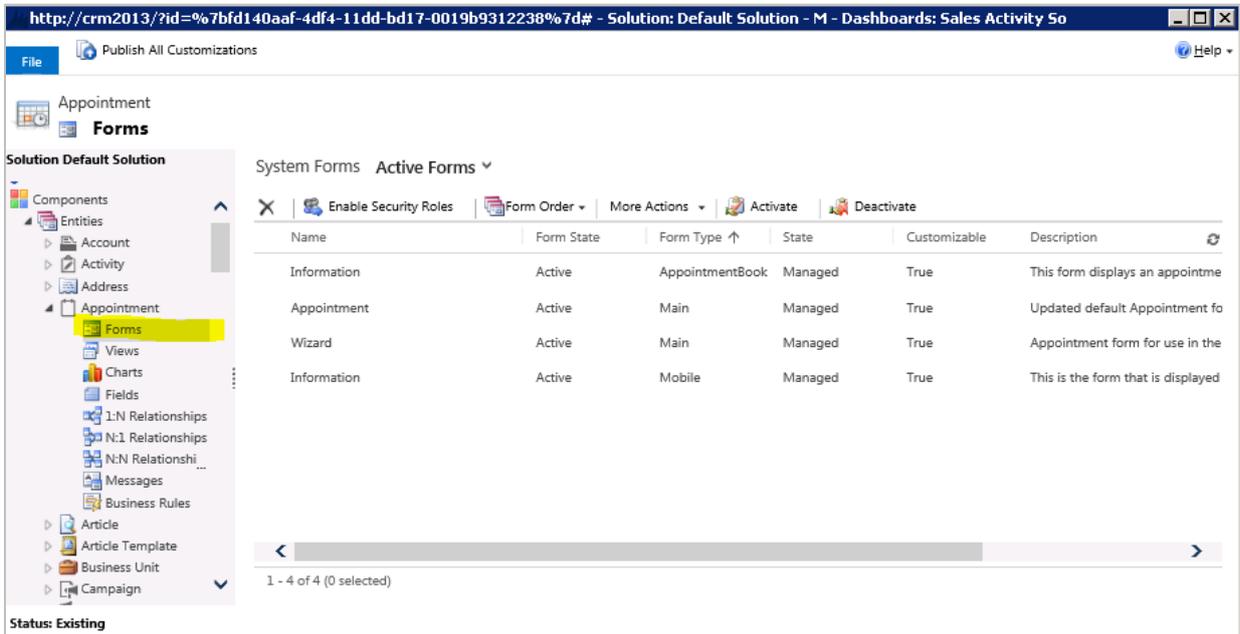
- After that, a new CRM window opens. Within this window, click on 'Entities' and you will get a list of all entities in your CRM system. (See screenshot below)



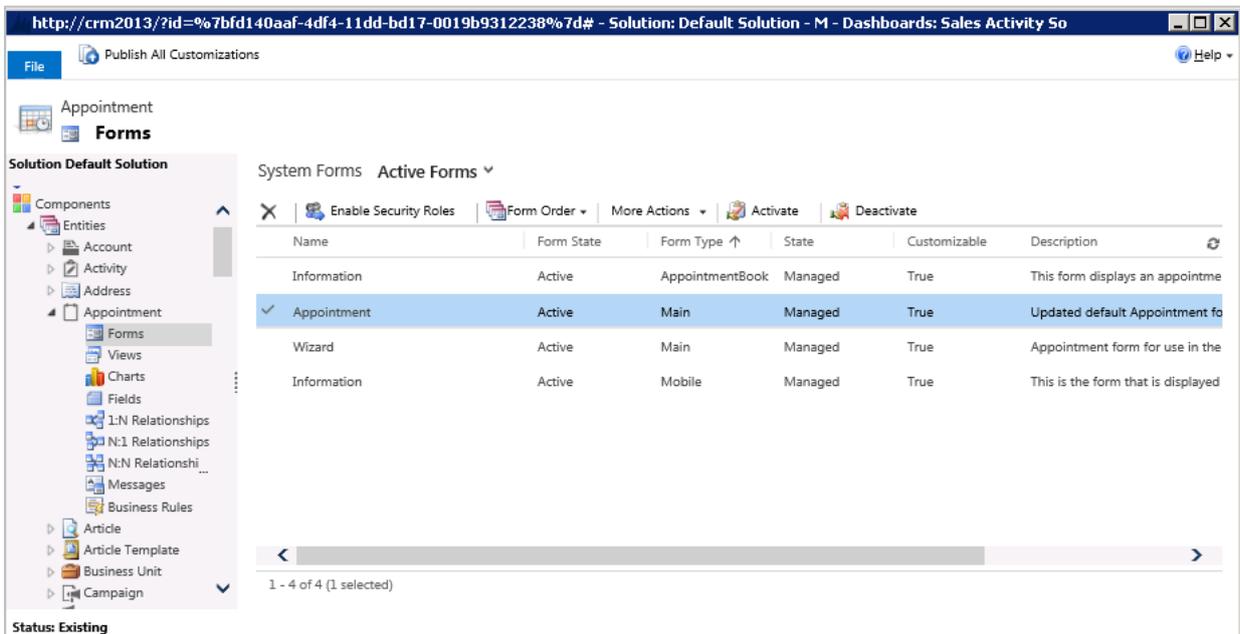
- Here, choose the entity 'Appointment' and double-click on it. (See screenshot below) (NOTE: If you would like to activate the color-coding-functionality for other activity types, you have to choose the other activity instead of 'Appointment'.)



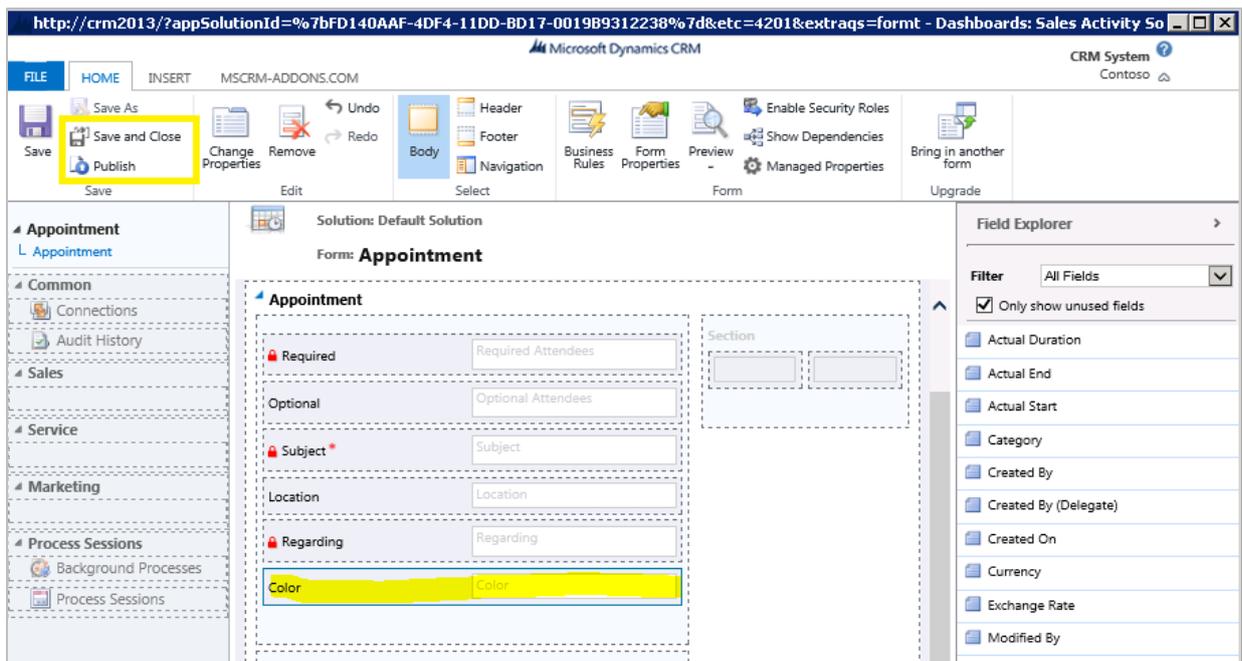
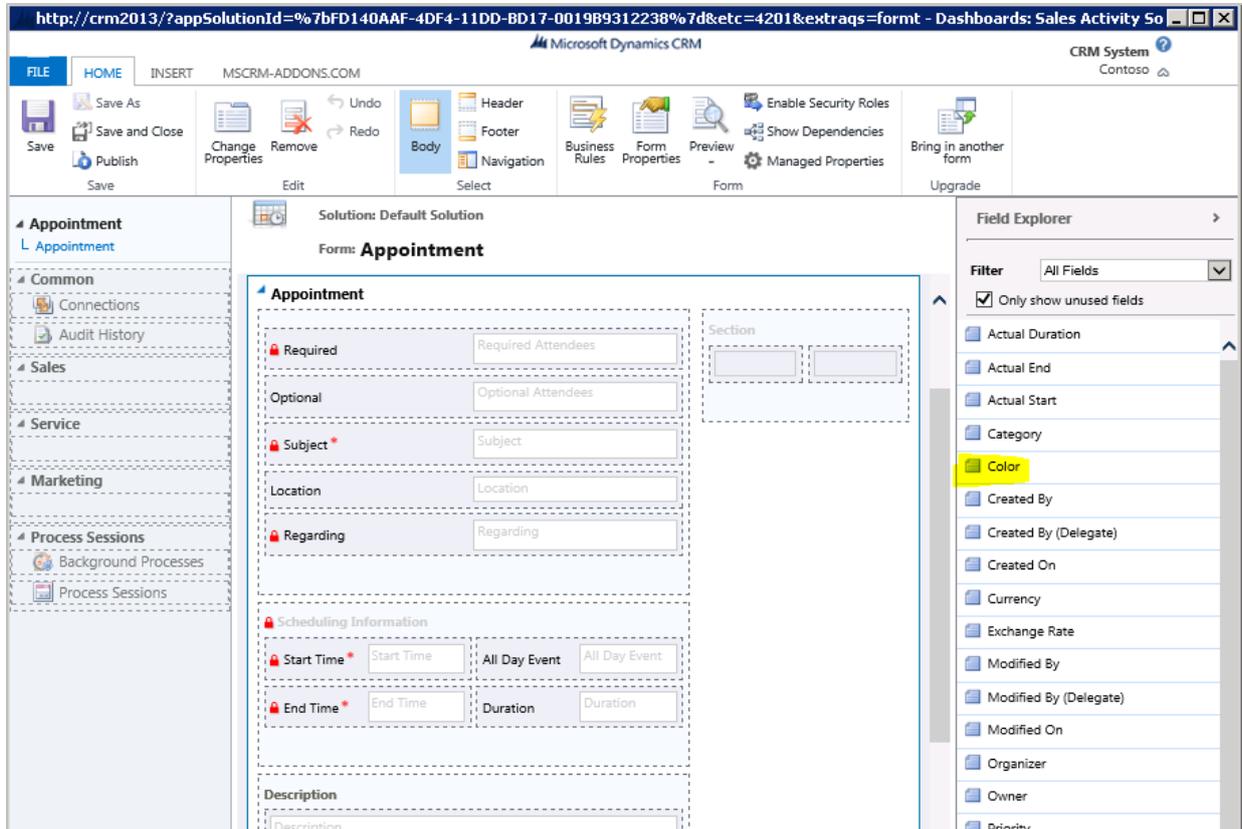
- The settings of the appointment-entity will open (see screenshot below). Click on 'Forms' within the menu on the left. (See screenshot below)



- Afterwards, you get a list of the forms of the appointment-entity. Double-click on the main-form of the entity. (See screenshot below)



- Here, you can customize the main form of this entity. To add the color-coding- functionality, 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. (See screenshots below)



- Afterwards, click on “publish” and “save and close” the window. The color-drop-down-menu will appear from now on within the appointment entity when scheduling an appointment. (see first screenshot of this chapter)

NOTE: As already mentioned, for adding this functionality to the other entities, follow the same procedure as described above (steps 1-7) with the exception of choosing another activity type instead of 'Appointment' within the 'customize the system' area of the CRM settings (step 3).

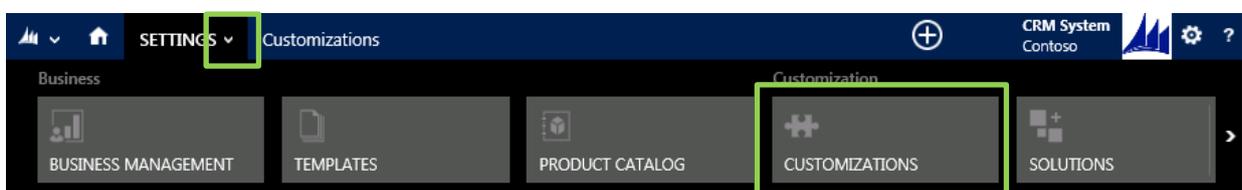
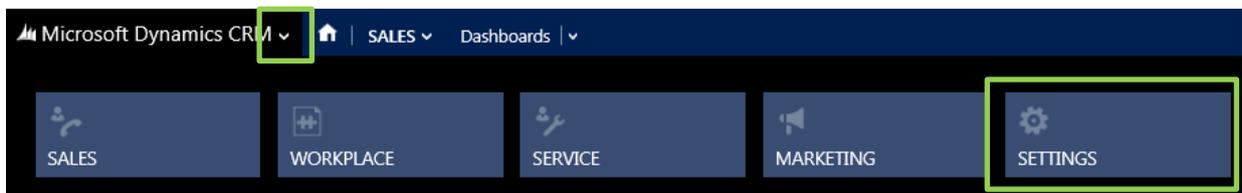
How to add additional colours

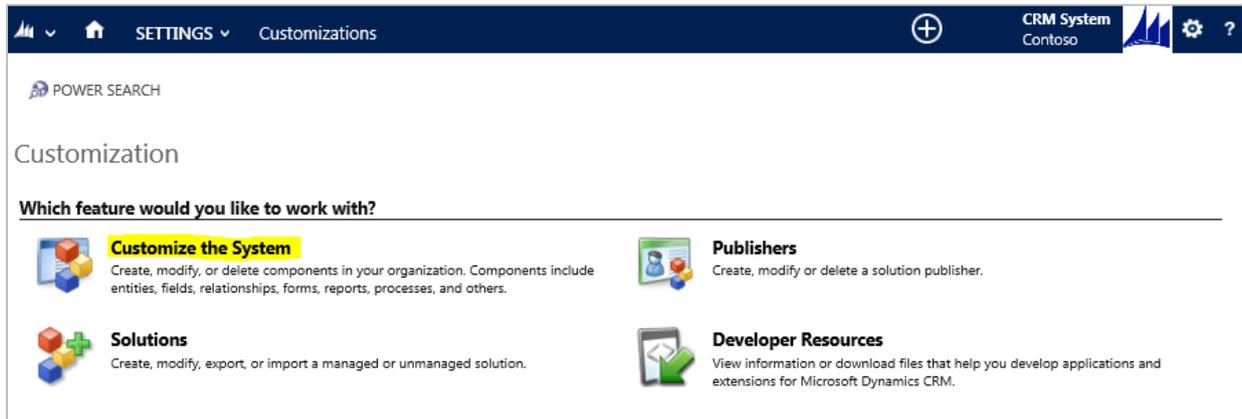
You always have the possibility to add further colors. Before you start the color adding process, it is important that you know the hex code of the color you would like to add. There are several free online color picker tools which help you to find out about the hex code of a specific color (e.g. <http://www.colorpicker.com/>). In our case, we would like to add a light grey color with the hex code #E0E0E0. In the steps below, we describe how to add this color to the color drop-down-menu within the appointment-entity.

NOTE: The procedure is the same for every color you want to add. Also, it is the same procedure for adding a new color to the color drop-down-menu within the other activity entities instead of the appointment entity (you just have to select the other activity type in step 2 and activity type color code in step 7). Following color settings exists for the different activities:

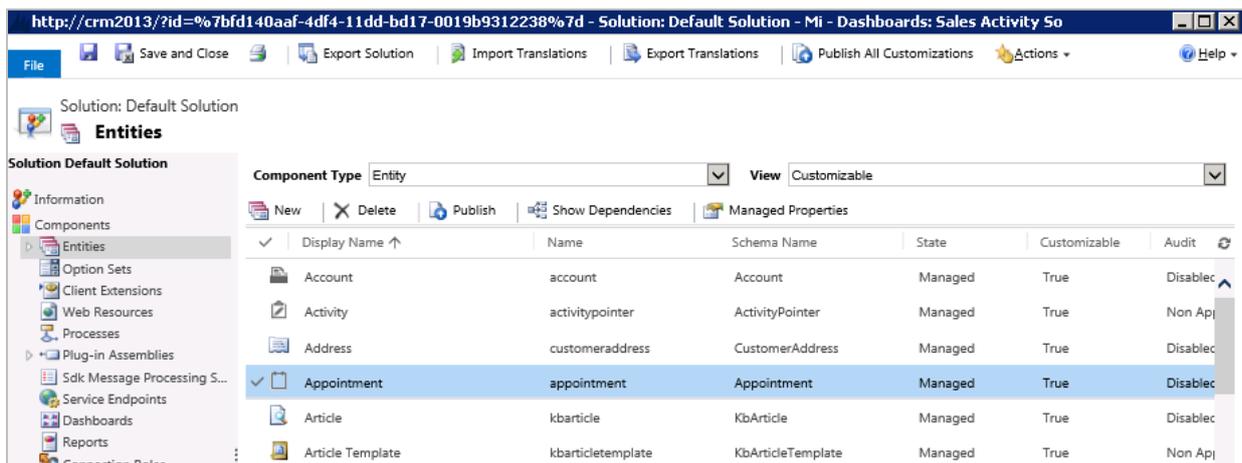
- TaskColorCode
- ServiceAppointmentColorCode
- EmailColorCode
- PhoneCallColorCode
- FaxColorCode
- LetterColorCode
- AppointmentColorCode

- Start in the 'Settings'-area of your CRM system, click on 'Customizations' within the menu on the left and then choose 'Customize the System'. (See screenshots below)

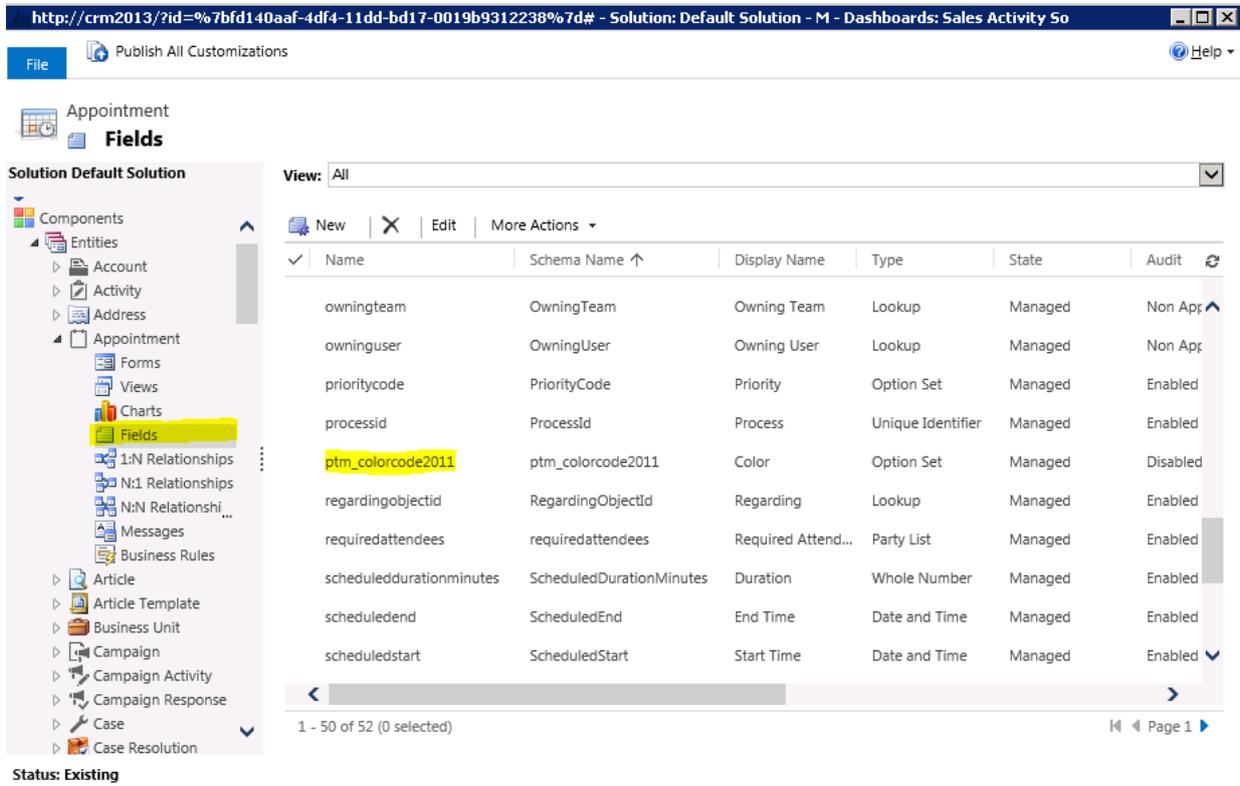




- Afterwards, click on 'Entities' within the menu on the left and double-click on the 'Appointment'-entity. (See screenshot below) NOTE: If you would like to add a colour to the colour drop-down-menu within another activity entity, you have to select another activity within this step.



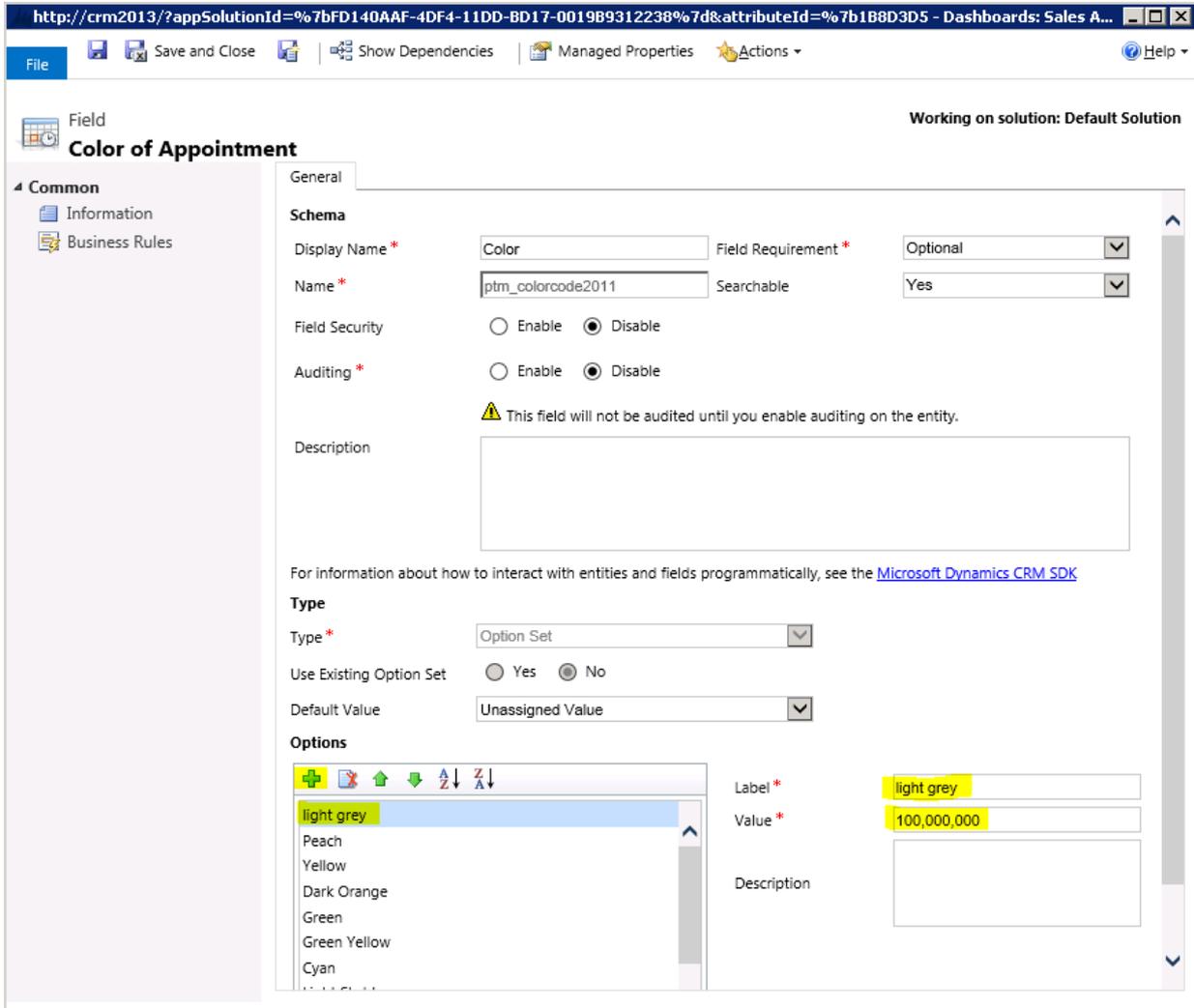
- Then, click on 'Fields' within the menu on the left and double-click on the field 'ptm_colorcode2011'. (See screenshots below)



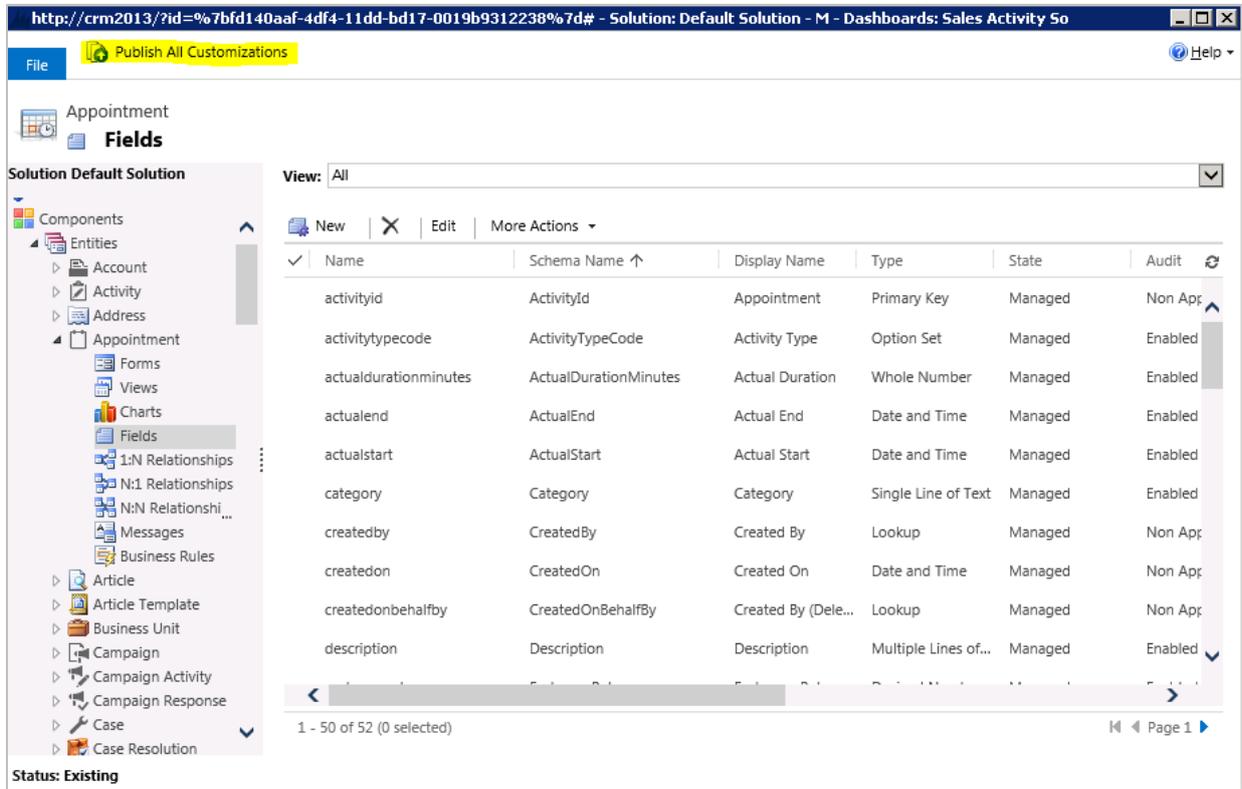
The screenshot shows the Microsoft Dynamics CRM 2013 interface. The browser address bar displays the URL: `http://crm2013/?id=%7bfd140aaf-4df4-11dd-bd17-0019b9312238%7d# - Solution: Default Solution - M - Dashboards: Sales Activity So`. The page title is "Appointment Fields". The left-hand navigation pane shows the "Fields" option under the "Appointment" entity selected. The main area displays a table of fields for the "Appointment" entity. The field "ptm_colorcode2011" is highlighted in yellow. Below the table, it indicates "1 - 50 of 52 (0 selected)" and "Page 1".

Name	Schema Name	Display Name	Type	State	Audit
owningteam	OwningTeam	Owning Team	Lookup	Managed	Non App
owninguser	OwningUser	Owning User	Lookup	Managed	Non App
prioritycode	PriorityCode	Priority	Option Set	Managed	Enabled
processid	ProcessId	Process	Unique Identifier	Managed	Enabled
ptm_colorcode2011	ptm_colorcode2011	Color	Option Set	Managed	Disabled
regardingobjectid	RegardingObjectId	Regarding	Lookup	Managed	Enabled
requiredattendees	requiredattendees	Required Attend...	Party List	Managed	Enabled
scheduleddurationminutes	ScheduledDurationMinutes	Duration	Whole Number	Managed	Enabled
scheduledend	ScheduledEnd	End Time	Date and Time	Managed	Enabled
scheduledstart	ScheduledStart	Start Time	Date and Time	Managed	Enabled

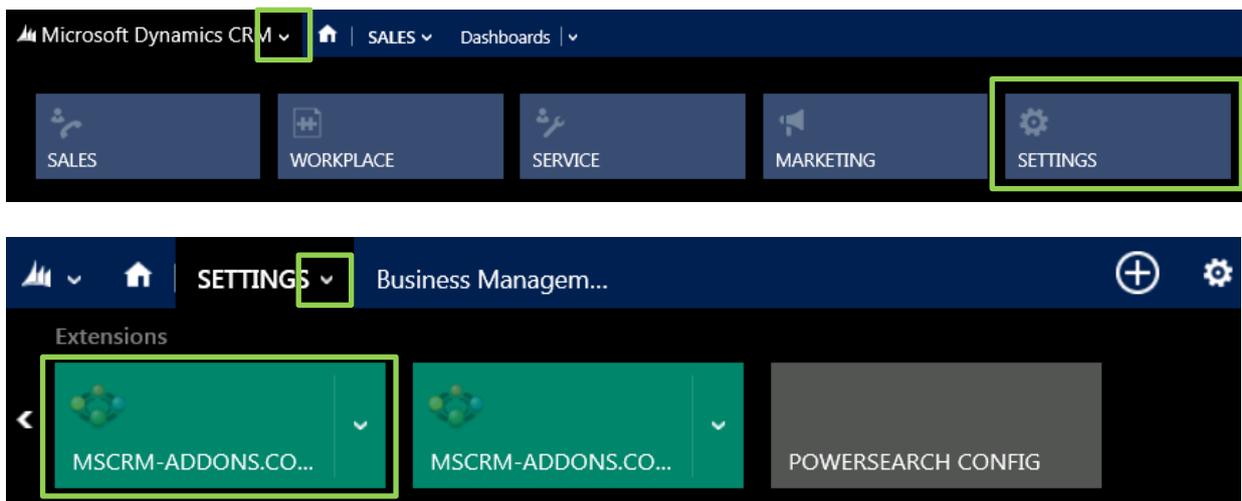
- 4a. A new window opens. Within this window, click on the green plus-sign in the 'Options'-area and type in the label of the color (name to be displayed within the color drop-down-menu). In our case, we type in 'light grey'. It is important that you remember the value of the color which is defined by your CRM system. In our case the value is 100.000.000. (See screenshot below)



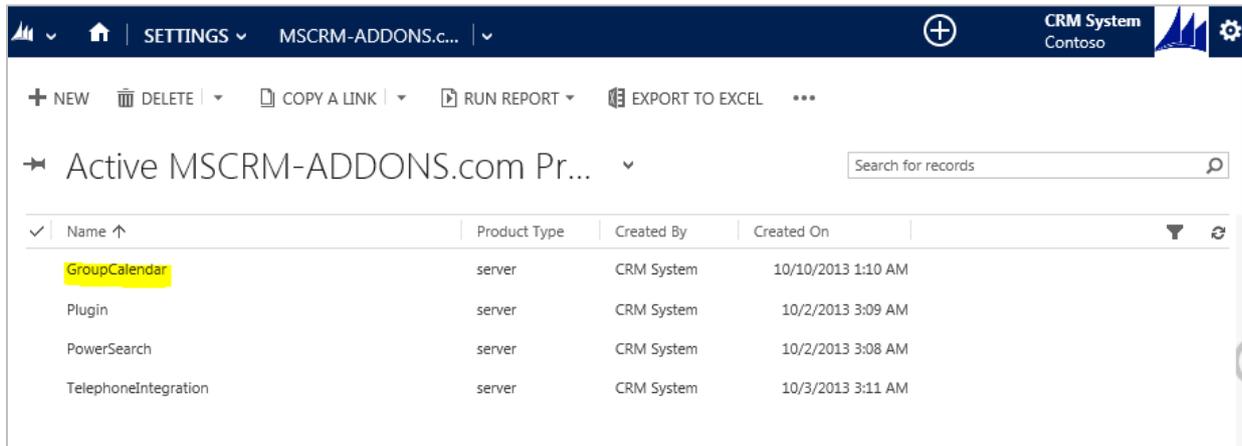
- 4b. After saving and closing, you have to publish the customization. To do so, please click on the 'Publish all Customizations'-button. (See screenshot below)



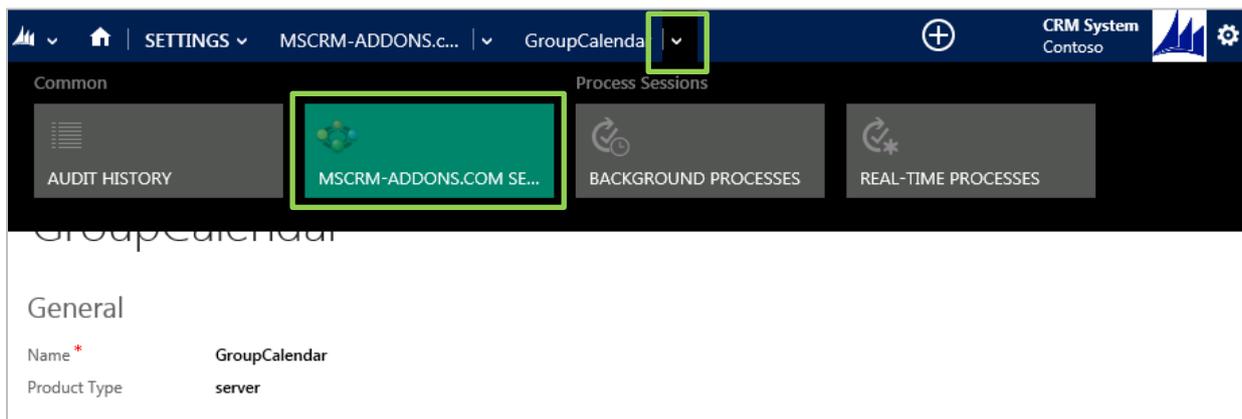
5. Go back to the settings of your CRM system and click on 'MSCRM-ADDONS.com Products'.



6. Afterwards, double-click on 'GroupCalendar' within the product list. (See screenshot below)



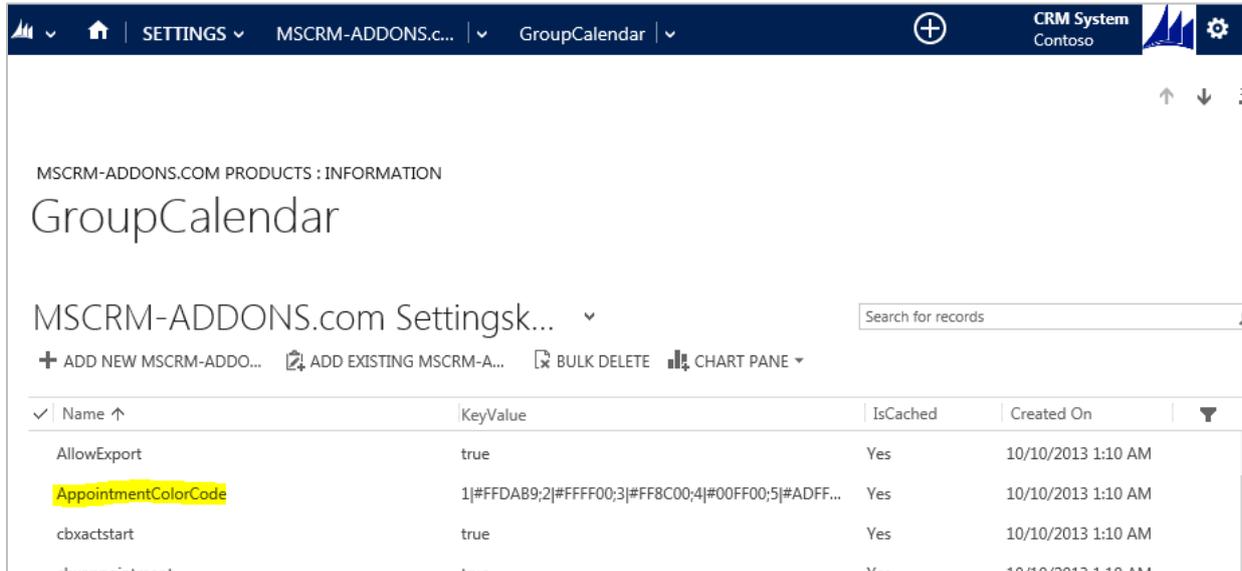
7. A new window will open. Within this window, click on 'MSCRM-ADDONS.com Settingskeys' within the menu on the ribbon. (See screenshot below)



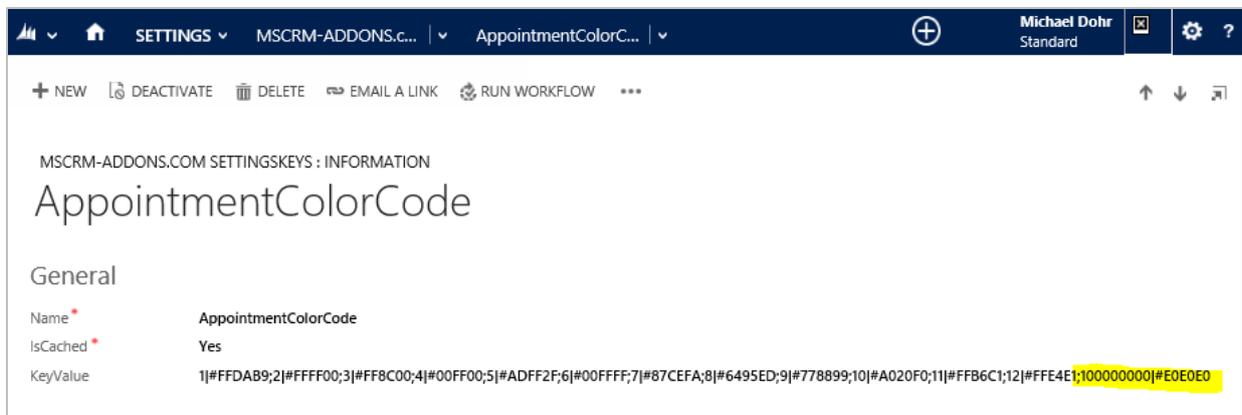
8. Then, double-click on 'AppointmentColorCode'. (See screenshot below)

NOTE: The procedure is the same for every color you want to add. Also, it is the same procedure for adding a new color to the color drop-down-menu within the other activity entities instead of the appointment entity (you just have to select the other activity type in step 2 and activity type color code in step 7). Following color settings exists for the different activities:

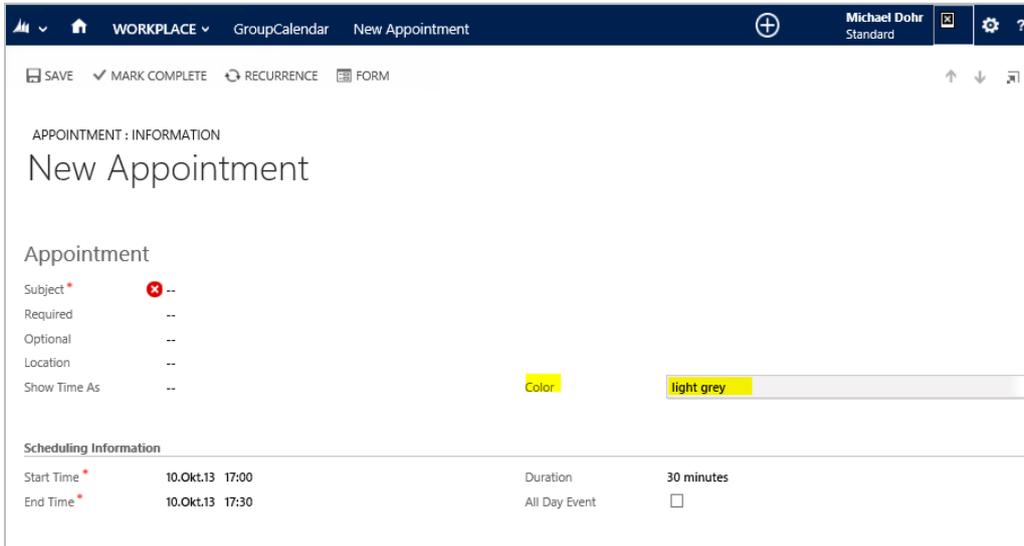
- TaskColorCode
- ServiceAppointmentColorCode
- EmailColorCode
- PhoneCallColorCode
- FaxColorCode
- LetterColorCode
- AppointmentColorCode



9. A new window opens. Within this window, add your color within the 'KeyValue'-area. To do so, you have to type in ';' followed by the value of the color defined by CRM (in our example the value was 100.000.000, please be aware that it is crucial to ignore all signs like '.' etc. when typing in the value, in our example, we type in '100000000'), by '|' and by the hex color code (in our example the hex code is #E0E0E0). (See screenshot below)



- Click on 'Save and Close'. Now, you have to close and open the browser again or to perform an IISRESET to refresh all new settings. Afterwards, you can choose the added color (in our case 'light grey') when scheduling a new appointment from the color drop-down-menu in the appointment-entity. The appointment will be displayed in that color. (See following two screenshots)



WORKPLACE GroupCalendar New Appointment

Michael Dohr Standard

SAVE MARK COMPLETE RECURRENCE FORM

APPOINTMENT INFORMATION

New Appointment

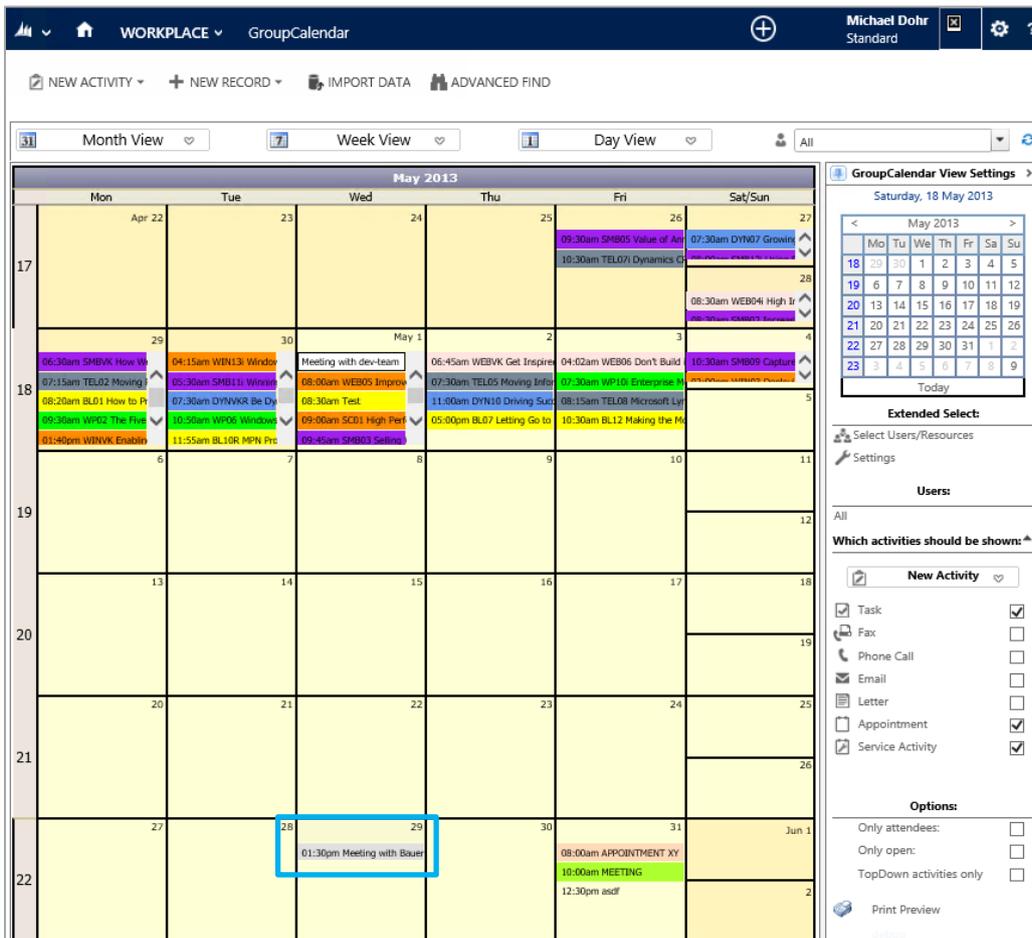
Appointment

Subject * ✖ --
 Required --
 Optional --
 Location --
 Show Time As --

Color Color light grey

Scheduling Information

Start Time * 10.Okt.13 17:00 Duration 30 minutes
 End Time * 10.Okt.13 17:30 All Day Event



WORKPLACE GroupCalendar

Michael Dohr Standard

NEW ACTIVITY NEW RECORD IMPORT DATA ADVANCED FIND

Month View Week View Day View All

May 2013						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
Apr 22	23	24	25	26	27	28
29	30	May 1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	Jun 1	2

GroupCalendar View Settings

Saturday, 18 May 2013

May 2013

Which activities should be shown:

- New Activity
- Task
- Fax
- Phone Call
- Email
- Letter
- Appointment
- Service Activity

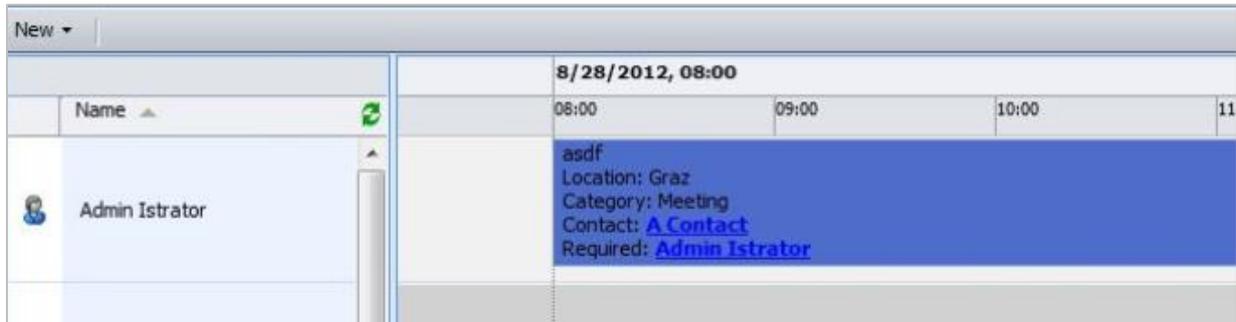
Options:

- Only attendees:
- Only open:
- TopDown activities only

Print Preview

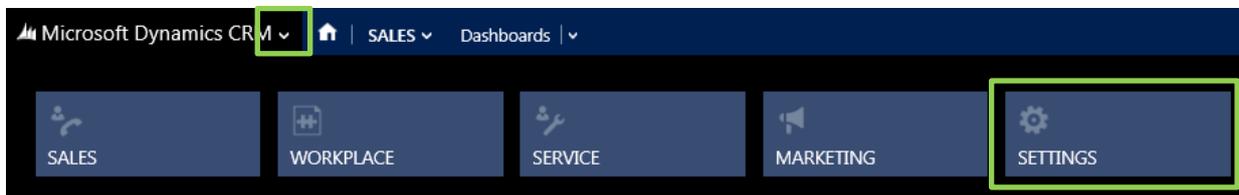
10.2 Gantt View: display various activity-attributes within multiple rows

This chapter explains how to configure the GroupCalendar in order to show additional activity-attributes within multiple rows in the GroupCalendar's Gantt View. Each additional attribute will be shown in a new line of an activity like in the screenshot below.

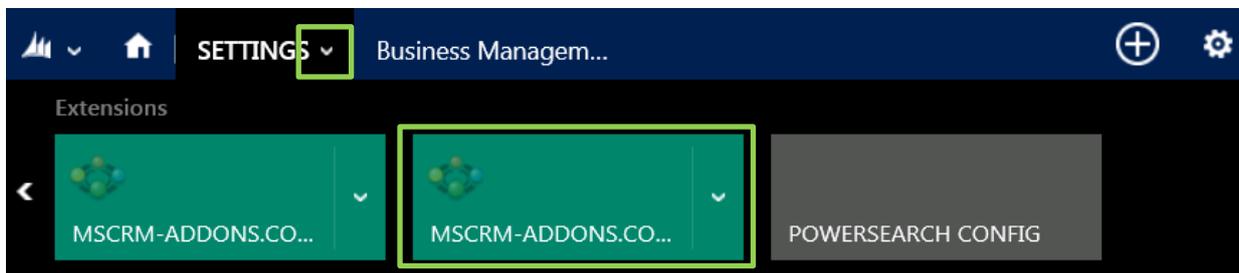


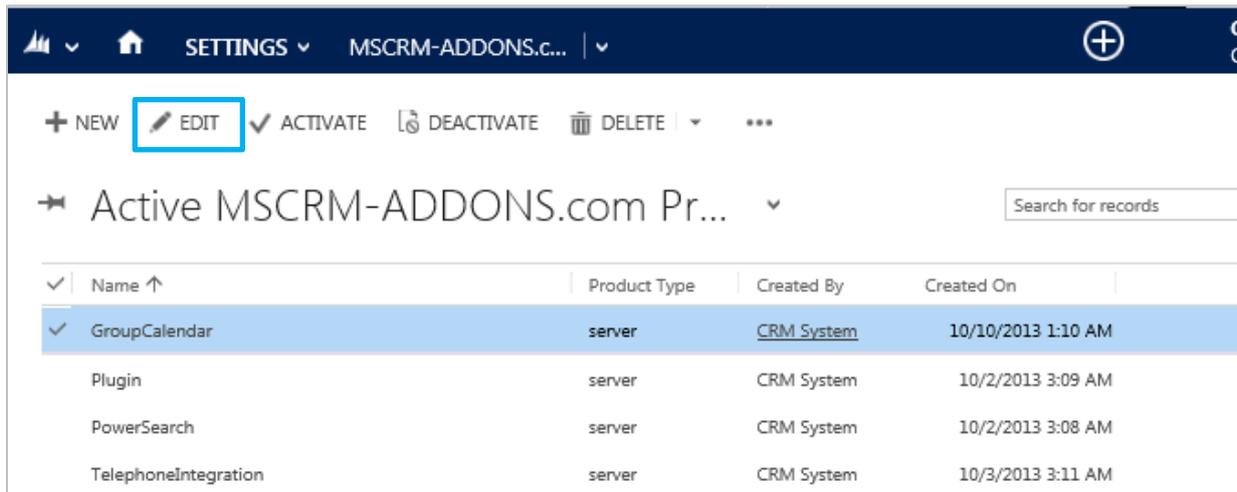
You have the possibility to configure as much lines as you like. There is no limitation. For each line, you can define a display name and the associated attribute. This is globally configured in the general GroupCalendar settings. To do so, please follow the steps described below.

1. Open your CRM in the Internet Explorer
2. Navigate to "Settings". (See screenshots below)

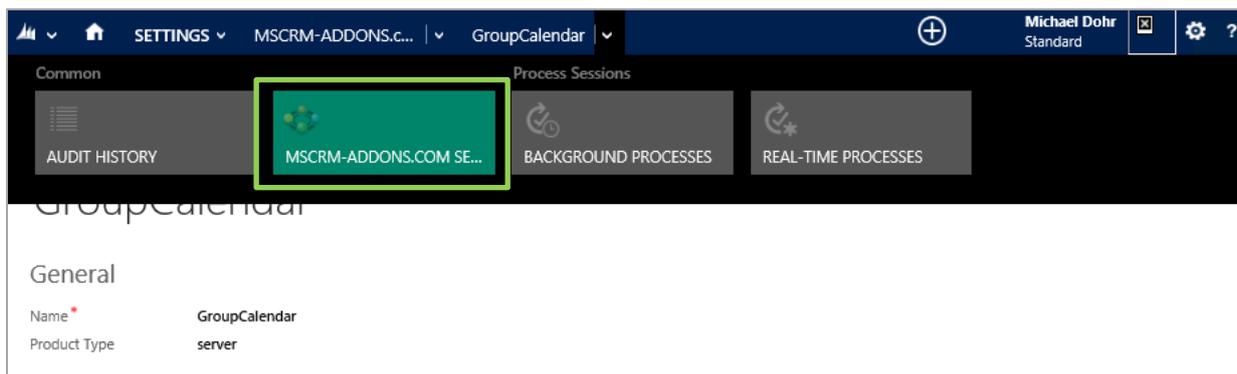
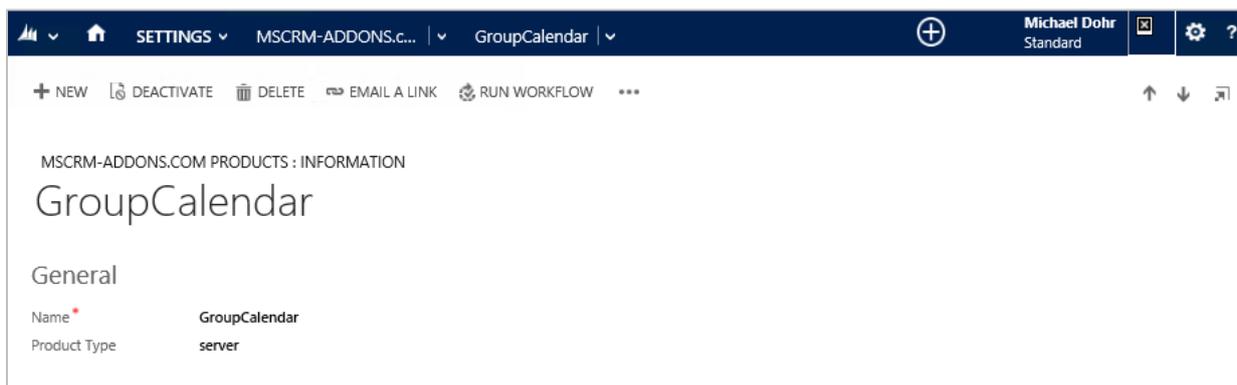


Afterwards, click on "MSCRM-ADDONS.com Products" in the "Extensions"-area of the ribbon and mark the checkbox in front of the GroupCalendar and click on "Edit" within the CRM menu at the top.

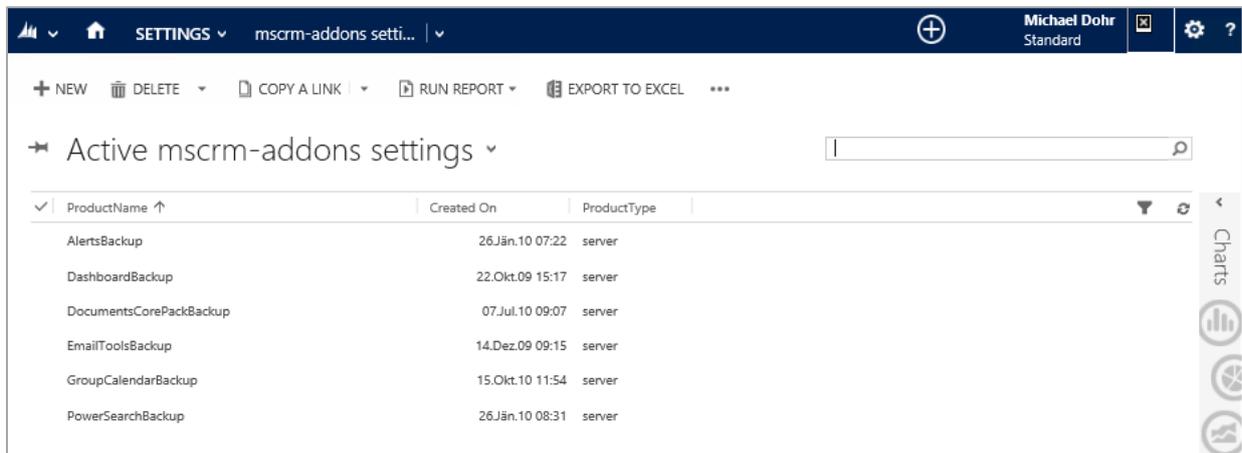




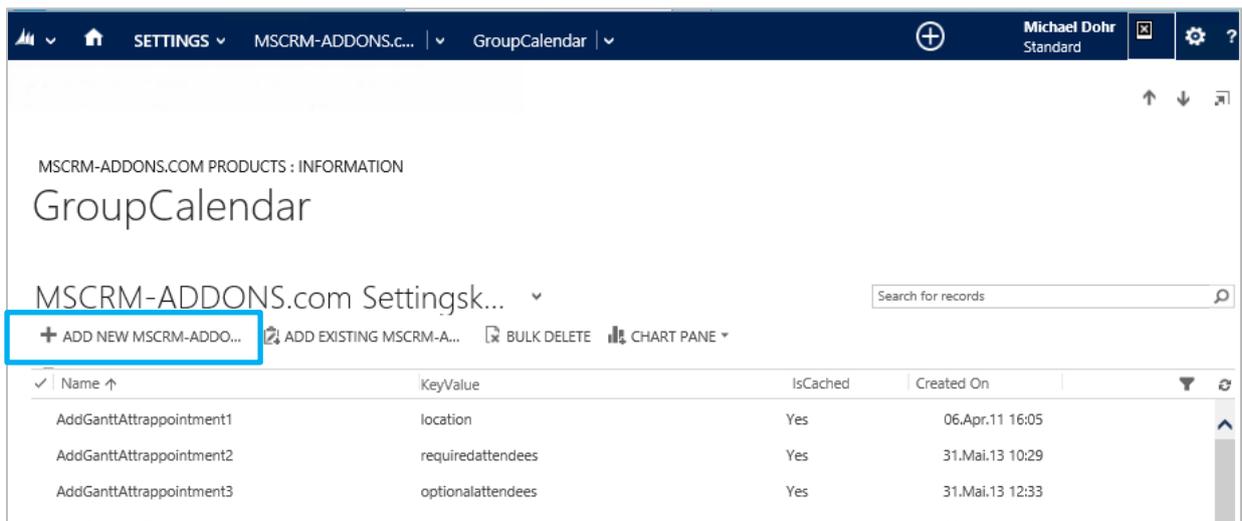
Then, the following window opens. Click on the "MSCRM-ADDONS.com Settingskeys" (See screenshots below).



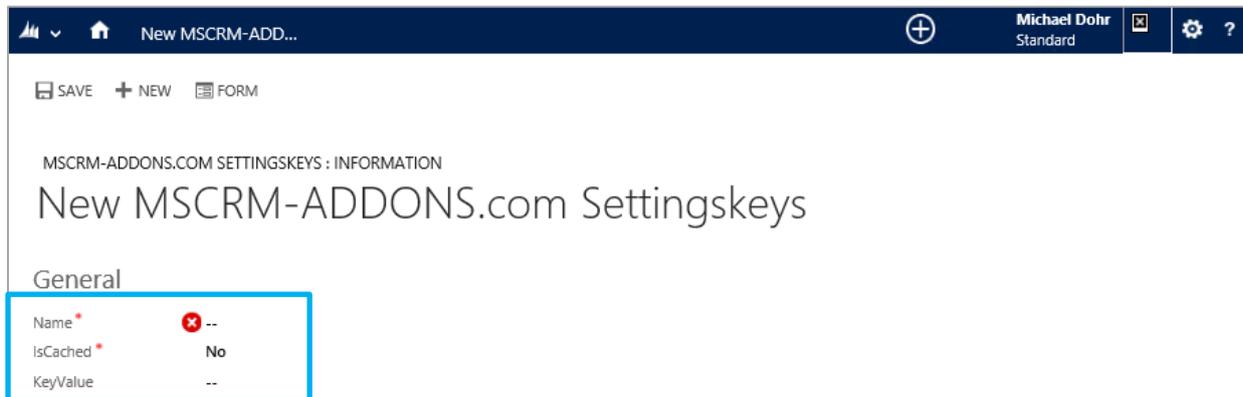
Following window opens:



- Now you have to generate a new key. To do so, click on "Add New MSCRM-ADDONS.com Settingskeys" within the CRM menu at the top. (See screenshot below)



In the following window (see screenshot below) you have to define a name of the key in the "Name"-field, to set the "IsCached"-field on "yes" and to type in a value in the "KeyValue"-field.



The syntax for the "Name"-field referring to the attribute description to be displayed is AddGanttAttrDesc[TYPENAME][LINENUMBER]. The syntax for the "Name"-field referring to the attribute to be shown is AddGanttAttr[TYPENAME][LINENUMBER]. The [TYPENAME] is the entity schema name (e.g. appointment) and the [LINENUMBER] is the line number of the attribute starting with 1. The first line will always be the subject.

Example: If you want to display an appointment entity with multiple rows, e.g. in the first row the attribute "location" with the display name "Location", in the second row the attribute "requiredattendees" with the display name "Required" and in the third row a custom attribute named "new_contactid" with the description "Contact", you have to type in the following key-names and key-values within the settingskey-configuration-window shown in the previous screenshot.

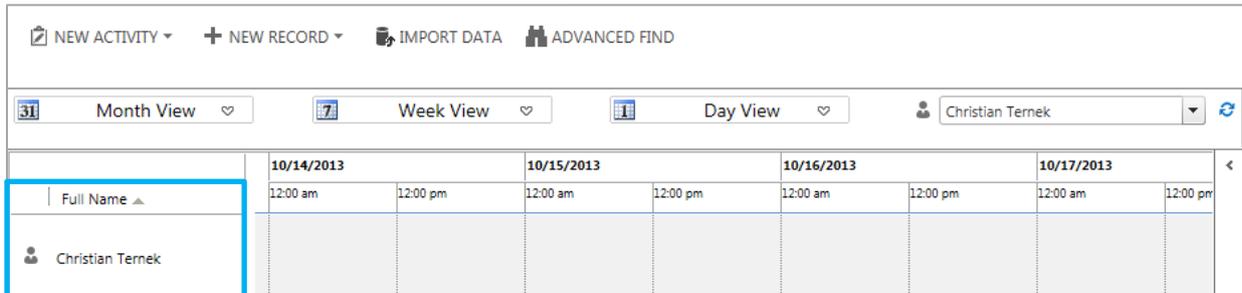
KeyName	KeyValue	Description
AddGanttAttrDescappointment1	Location	Appointment 1. line, displayname "Location"
AddGanttAttrappointment1	Location	Appointment 1. line, attribute "location"
AddGanttAttrDescappointment2	Required	Appointment 2. line, displayname "Required"
AddGanttAttrappointment2	requiredattendees	Appointment 2. line, attribute "requiredattendees"
AddGanttAttrDescappointment3	Contact	Appointment 3. line, displayname "Contact"
AddGanttAttrappointment3	new_contactid	Appointment 3. line, attribute "new_contactid"

After you have typed in the key-name and the key-value, click on "Save and Close" in the CRM menu at the top. Afterwards, start to create a new settingskey with the key-name and the key-value of the attribute or the attribute description-name you want to add next.

In addition, you have to configure in which Gantt-views you want these attributes to be displayed. This setting is named GanttMultipleLineViews. Possible values are daygantt, weekgantt and monthgantt. The settings can also be combined. If you want to e.g. display the multiple lines in the day- and week-Gantt-view, you have to type in "daygantt,weekgantt" as the value of the setting.

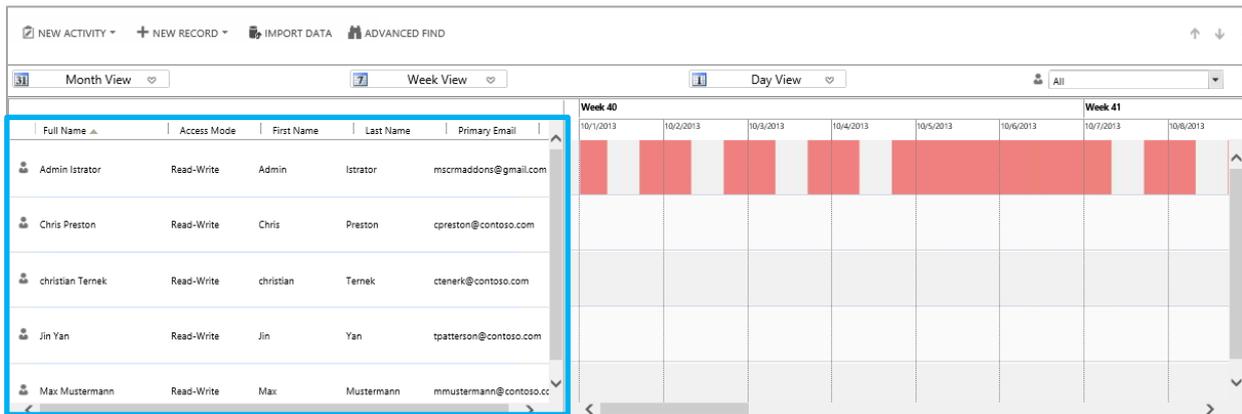
10.3 Gantt View: custom columns in the user list

With GroupCalendar you have the possibility to customize the user pane of the Gantt view. Per default only the fullname of the system user is shown. Please see screenshot for example.

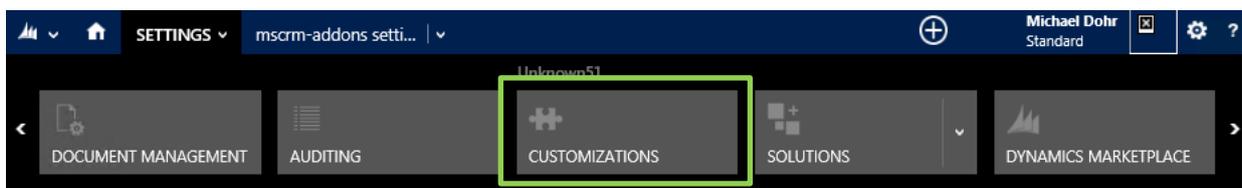
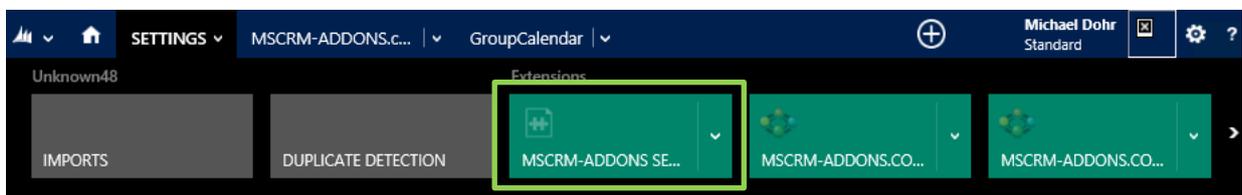


With the new feature you're able to customize the columns which will be shown here. You're able to define the columns, column widths and also the sorting.

In this example we've modified the view to show the Access Mode, Full Name and Primary E-mail. Sorted by Access Mode ascending and then by Primary E-Mail descending.



To define this view, go within CRM to Settings -> Customizations -> Customize the system -> Select Systemuser -> Views and create a new view. See screenshots below:



SETTINGS Customizations Michael Dohr Standard

Customization

Which feature would you like to work with?

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.

Publishers
Create, modify or delete a solution publisher.

Developer Resources
View information or download files that help you develop applications and extensions for Microsoft Dynamics CRM.

File Save and Close Export Solution Import Translations Export Translations Publish All Customizations Actions Help

Solution: Default Solution

Entities

Solution Default Solution

- Information
- Components
- Entities**
- Option Sets
- Client Extensions
- Web Resources
- Processes
- Plug-in Assemblies
- Sdk Message Processing S...
- Service Endpoints
- Dashboards
- Reports
- Connection Roles
- Article Templates
- Contract Templates
- Email Templates
- Mail Merge Templates
- Security Roles
- Field Security Profiles

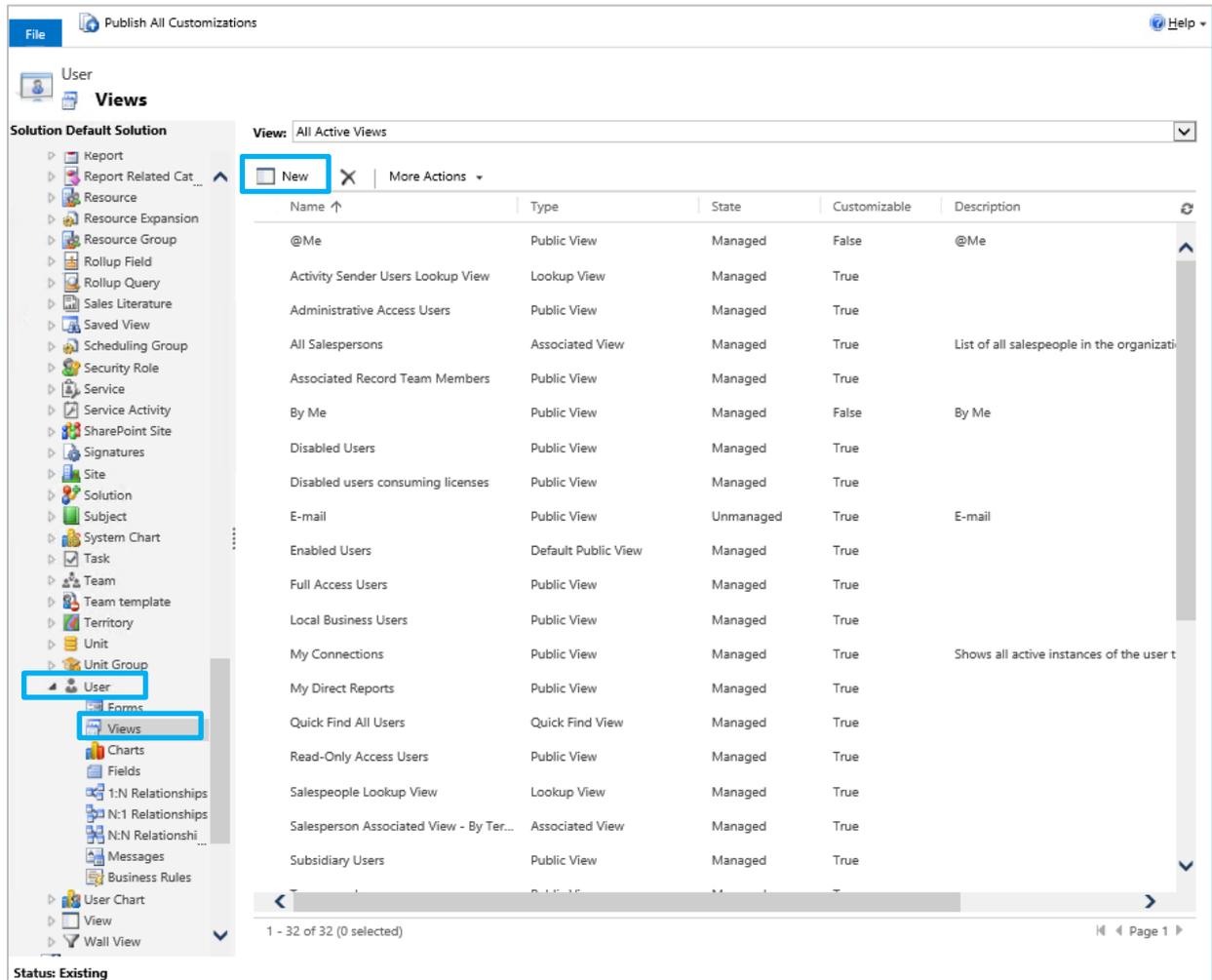
Component Type Entity View Customizable

New Delete Publish Show Dependencies Managed Properties

Display Name ↑	Name	Schema Name	State	Customizable	Aud
Signatures	new_signatures	new_signatures	Unmanaged	True	Disabled
Site	site	Site	Managed	True	Disabled
Solution	solution	Solution	Managed	True	Disabled
Subject	subject	Subject	Managed	True	Disabled
System Chart	savedqueryvisualization	SavedQueryVisualization	Managed	True	Disabled
Task	task	Task	Managed	True	Disabled
Team	team	Team	Managed	True	Disabled
Team template	teamtemplate	TeamTemplate	Managed	True	Disabled
Territory	territory	Territory	Managed	True	Disabled
Unit	uom	UoM	Managed	True	Disabled
Unit Group	uomschedule	UoMSchedule	Managed	True	Disabled
User	systemuser	SystemUser	Managed	True	Disabled
User Chart	userqueryvisualization	UserQueryVisualization	Managed	True	Disabled
View	savedquery	SavedQuery	Managed	True	Disabled

101 - 114 of 114 (0 selected) Page 3

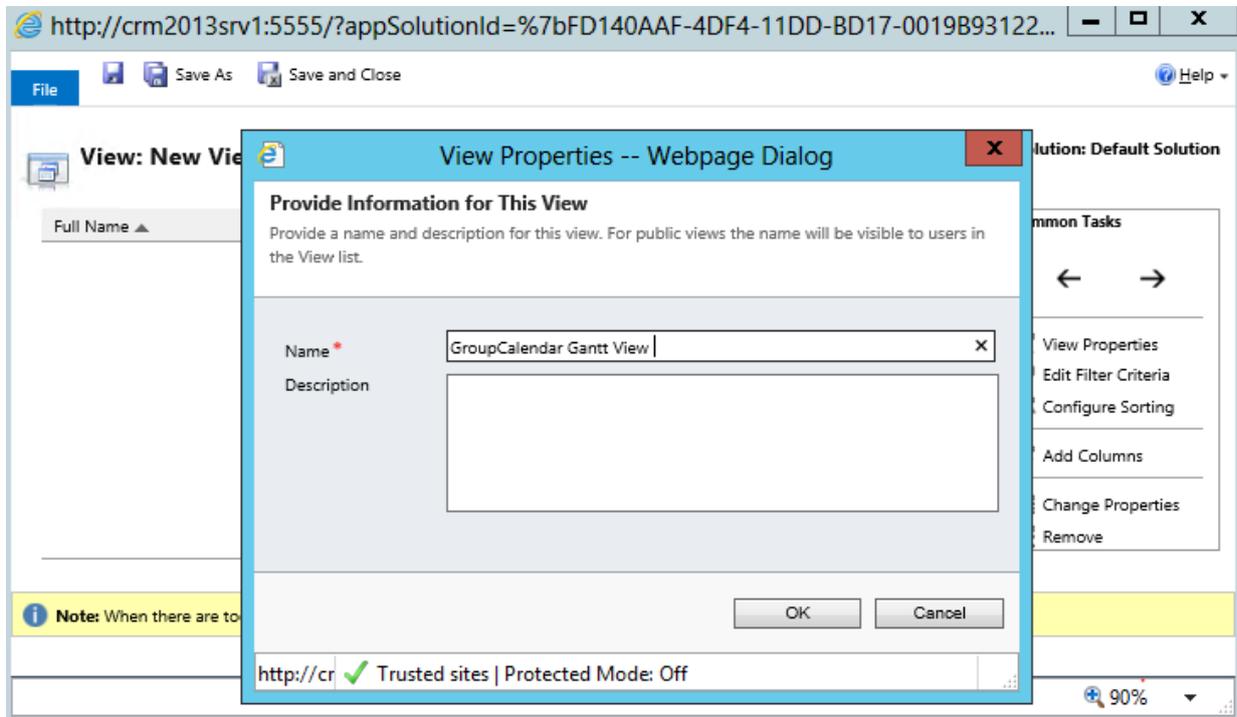
Status: Existing



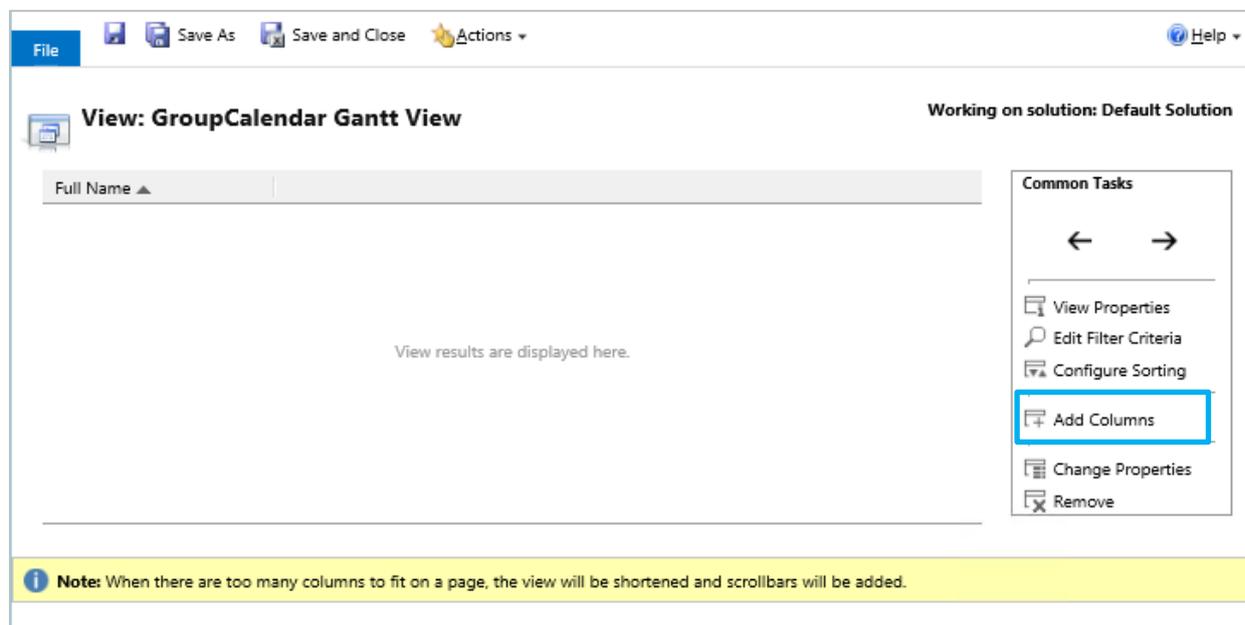
Here you could define your view. Define the columns you need, specify the width of each column and also the sorting.

After you saved the view don't forget to publish the customization!

In the screenshot below, you can define the name of the new view. Click on [OK]



Next, define the requested information in the box on the right. In our example "Add Columns". See screenshots below:



Add Columns ✕

Select the columns to add to this view.

Record Type: User ▼

<input type="checkbox"/> Display Name ▲	Name	Type	
<input type="checkbox"/>	Access Mode	accessmode	Option Set
<input type="checkbox"/>	Address	address1_composite	Multiple Lines of Text
<input type="checkbox"/>	Address 1: County	address1_county	Single Line of Text
<input type="checkbox"/>	Address 1: Fax	address1_fax	Single Line of Text
<input type="checkbox"/>	Address 1: Latitude	address1_latitude	Floating Point Number
<input type="checkbox"/>	Address 1: Longitude	address1_longitude	Floating Point Number
<input type="checkbox"/>	Address 1: Name	address1_name	Single Line of Text
<input type="checkbox"/>	Address 1: Post Office Box	address1_postofficebox	Single Line of Text

Configure Sort Order ✕

Select the columns to sort on by default.

Sort By: Full Name ▼

Ascending Order
 Descending Order

Then By: Select ▼

Ascending Order
 Descending Order

What you would need now, is the unique ID of the new created view. You could find it in the address bar:

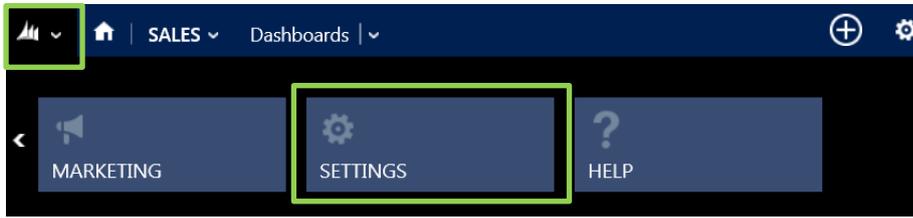
<http://crm2011r3:5555/alist/tools/vieweditor/viewManager.aspx?appSolutionId=%7bFD140AAF-4DF4-11DD-BD17-0019B9312238%7d&entityId=%7b60696D5D-4D78-4712-B4E0-6CBEF3DF4906%7d&id=%7b29A13E6F-EBF0-E111-977B-00155DC8AE09%7d>

After that modify the global GC settings. For details have a look [here](#).

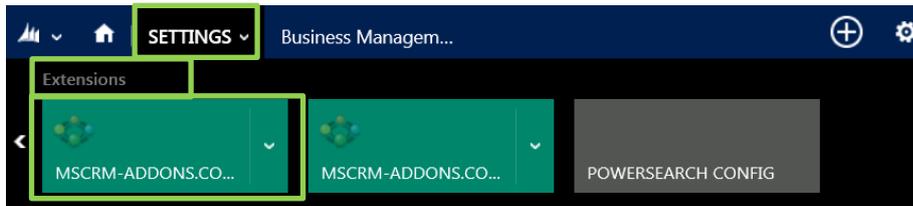
Create a new setting named GanttUserTemplateId and as the Key/Value the ID of the newly created view. Please also select IsCached = Yes

Please follow the steps below:

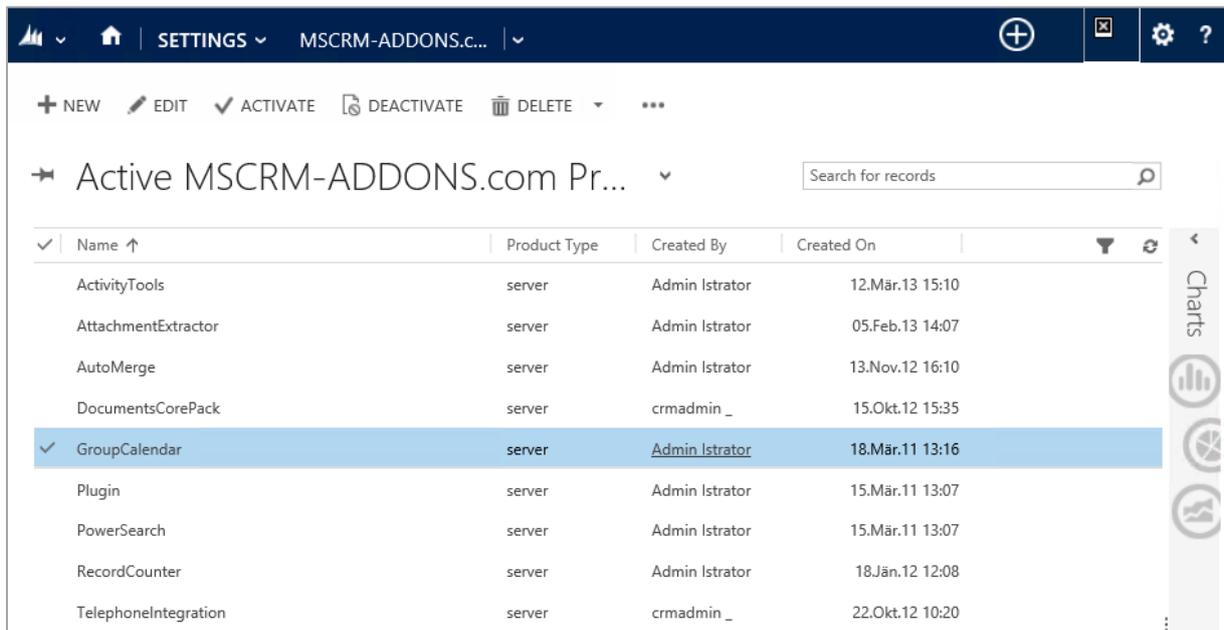
Open CRM – go to “Microsoft Dynamics CRM” Logo on the left corner – click on settings



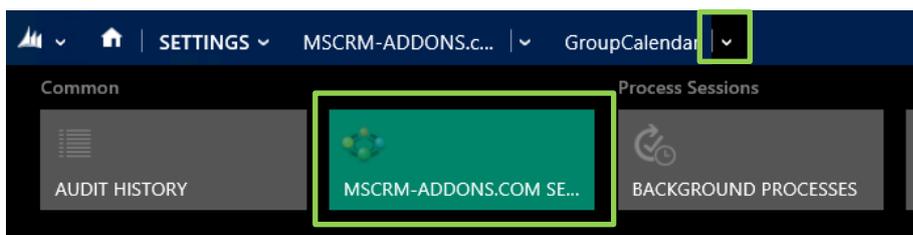
Click again on “SETTINGS” - go to the “Extensions Area” and click on “MSCRM-ADDONS.com Products”.



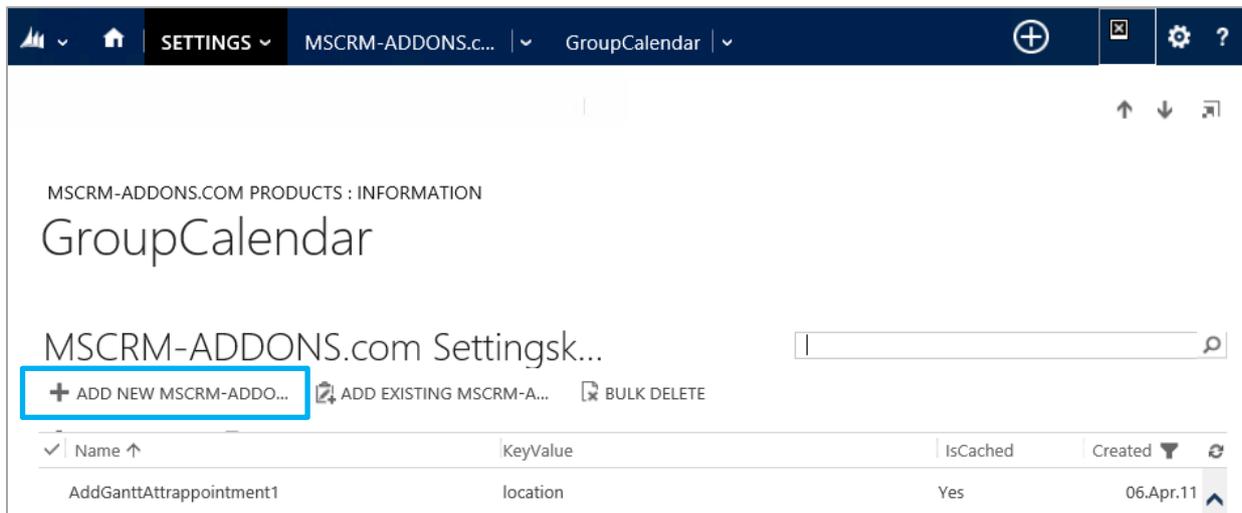
This action will open following window.



Within this window choose GroupCalendar with a double-click and then click on the drop down button next to the product on the ribbon to get to the settingskeys area.



Click on "+ADD NEW MSCRM-ADDONS SETTINGSKEYS" to create a new settingskey.



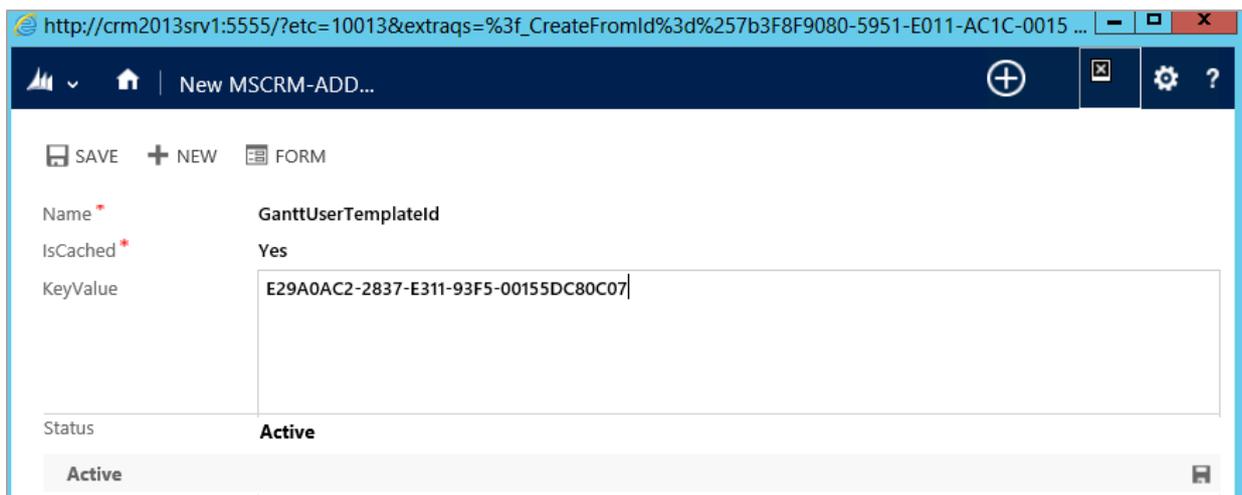
MSCRM-ADDONS.COM PRODUCTS : INFORMATION

GroupCalendar

MSCRM-ADDONS.com Settingskeys

+ ADD NEW MSCRM-ADDONS SETTINGSKEYS ADD EXISTING MSCRM-ADDONS SETTINGSKEYS BULK DELETE

Name ↑	KeyValue	IsCached	Created
AddGanttAppointment1	location	Yes	06.Apr.11



http://crm2013srv1:5555/?etc=10013&extraqs=%3f_CreateFromId%3d%257b3F8F9080-5951-E011-AC1C-0015 ...

New MSCRM-ADDONS SETTINGSKEYS

SAVE NEW FORM

Name * **GanttUserTemplateId**

IsCached * **Yes**

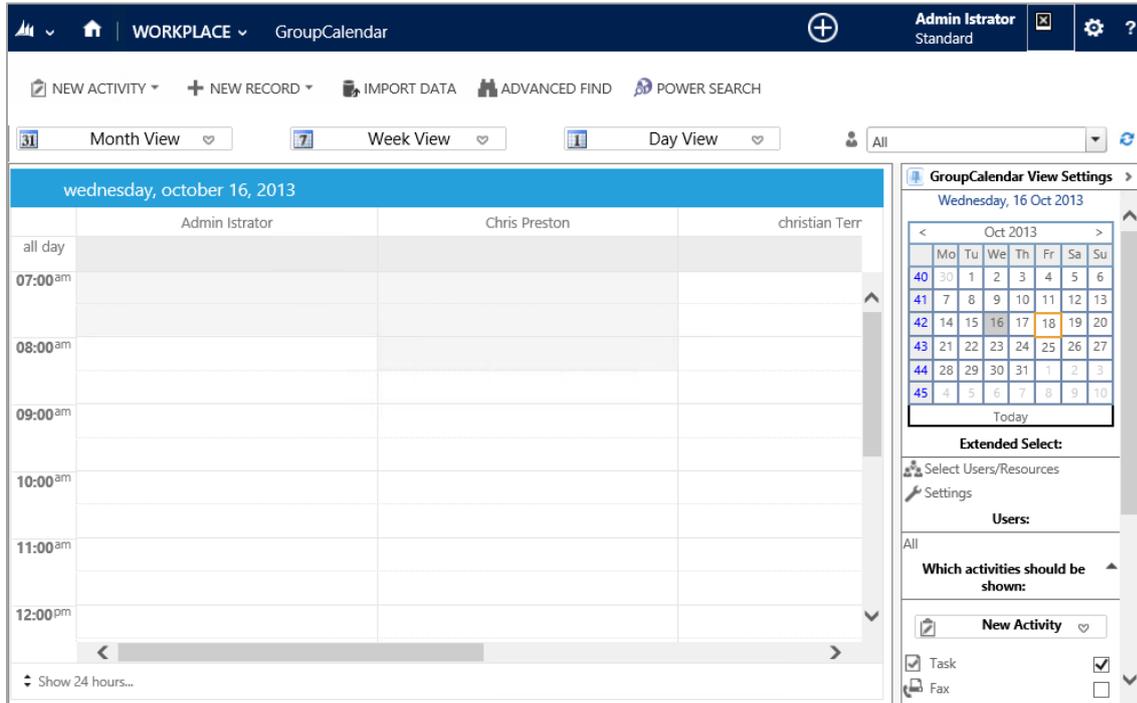
KeyValue **E29A0AC2-2837-E311-93F5-00155DC80C07**

Status **Active**

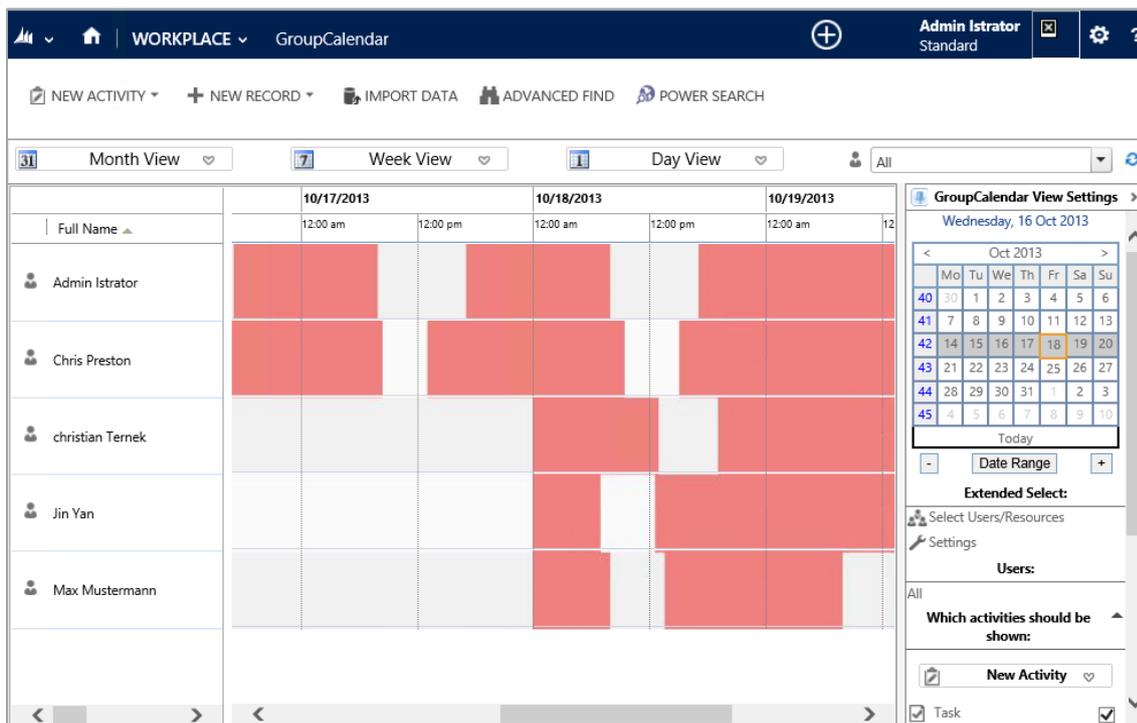
Active

10.4 Show Working Hours and Time-Off

Within CRM 2013, it is possible to specify working hours and time-off (e.g. vacation) for each user and resource. With GroupCalendar it is now possible to show these working hours and the time-off.

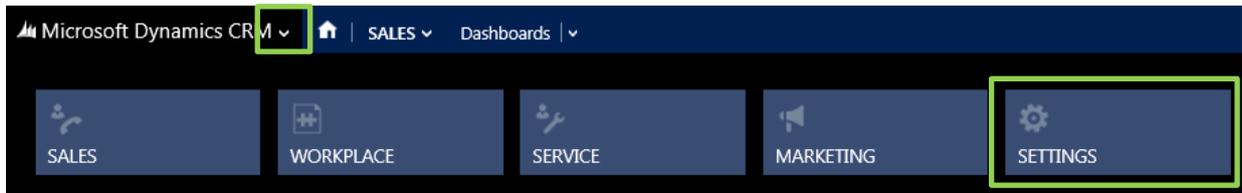


The Screenshot below shows working-hours and time-off for users and resources in Gantt View

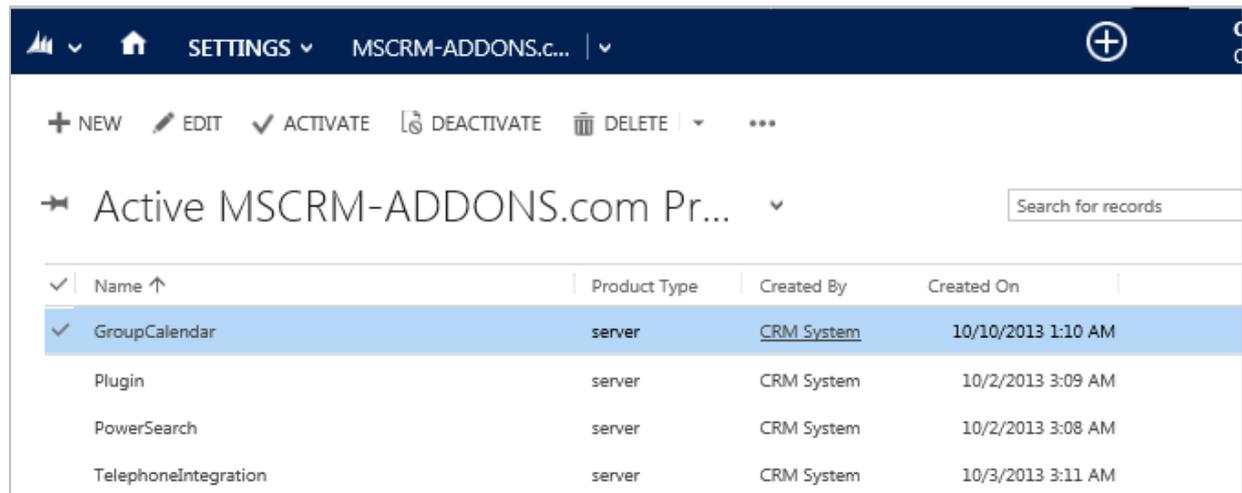
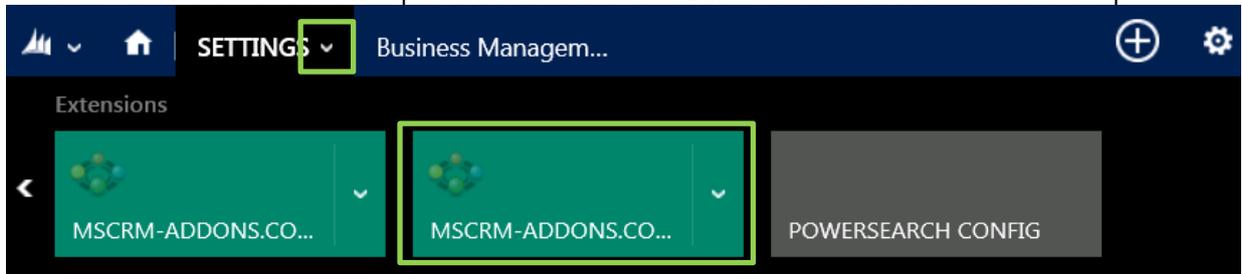


Per default, this feature is not enabled because it has a slight performance impact on loading the views. To enable this functionality, please follow the steps below.

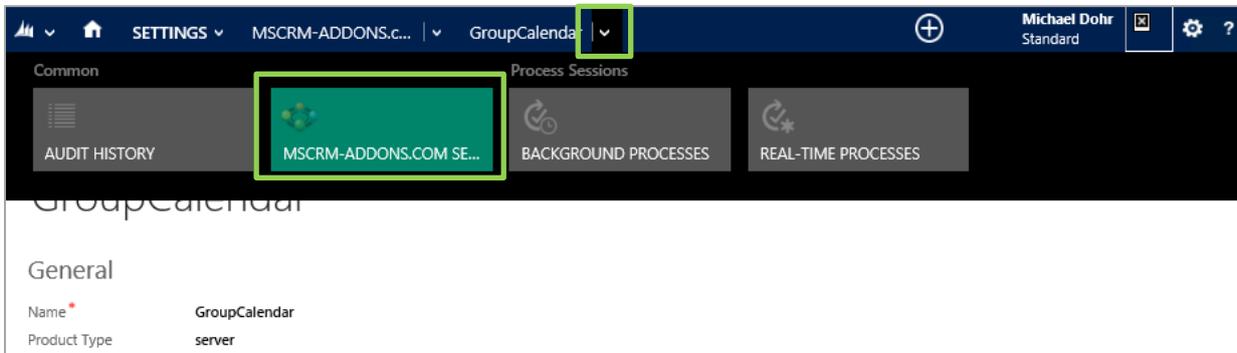
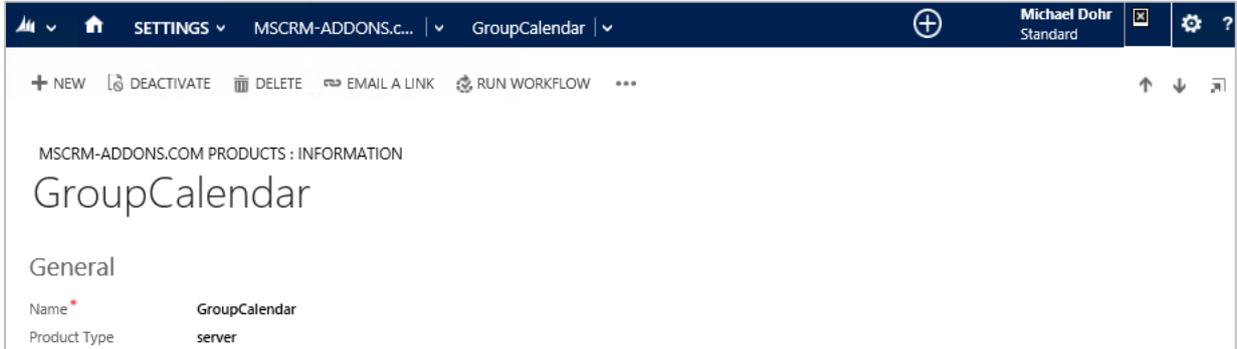
1. Open your CRM in the Internet Explorer
2. Navigate to "Settings" within the CRM sitemap (menu on the left, see screenshot below)



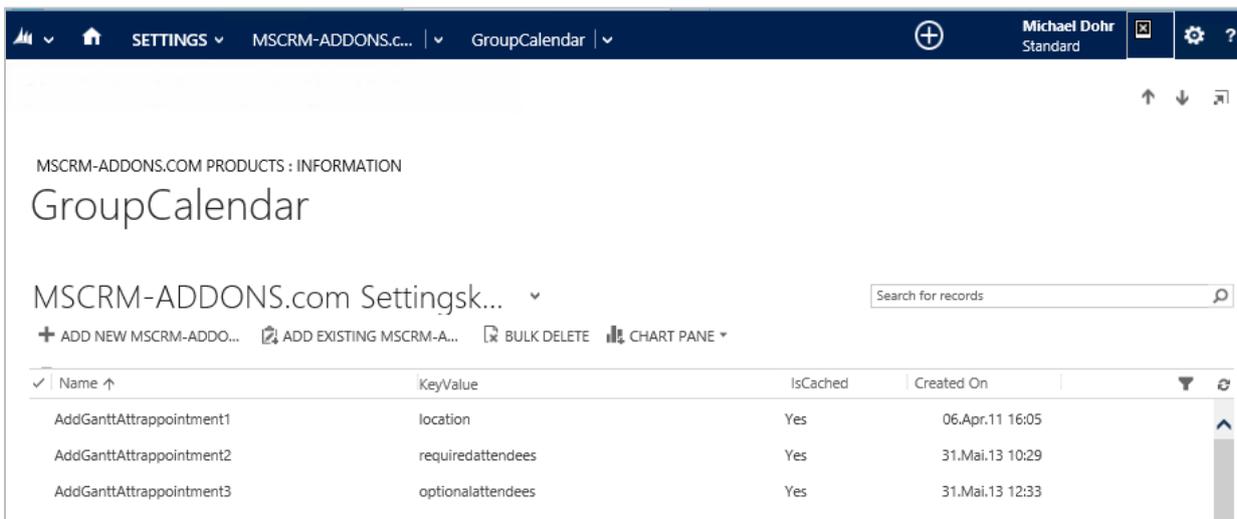
Afterwards, click on "MSCRM-ADDONS.com Products" in the CRM sitemap (see screenshot below), mark the checkbox in front of the GroupCalendar and click on "Edit" within the CRM menu at the top.



Then, the following window opens. Click on the “MSCRM-ADDONS.com Settingskeys” within the ribbon (see screenshot below)



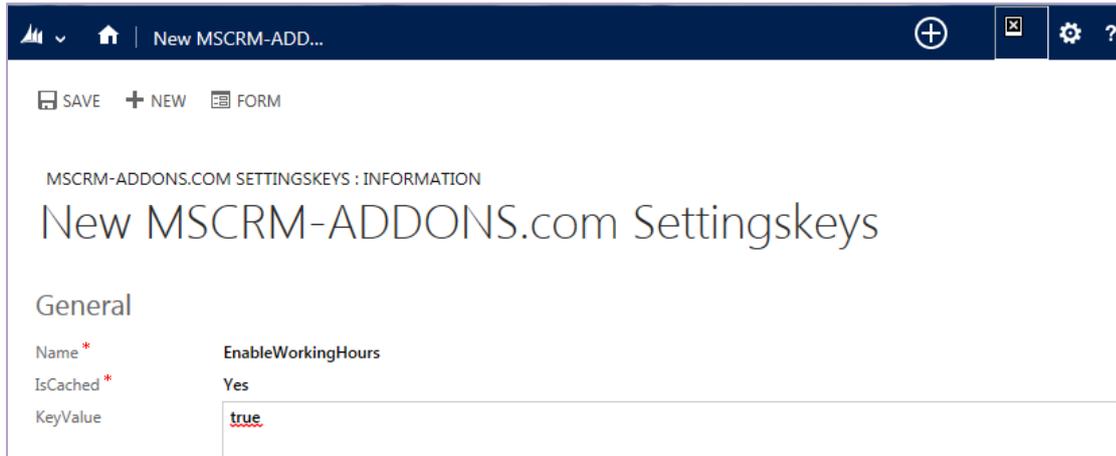
3. Now you have to generate a new key. To do so, click on “Add New MSCRM-ADDONS.com Settingskeys” within the CRM menu at the top. (See screenshot below)



Screenshot: “Add MSCRM-ADDONS.com Settingskeys”-button in CRM menu at the top

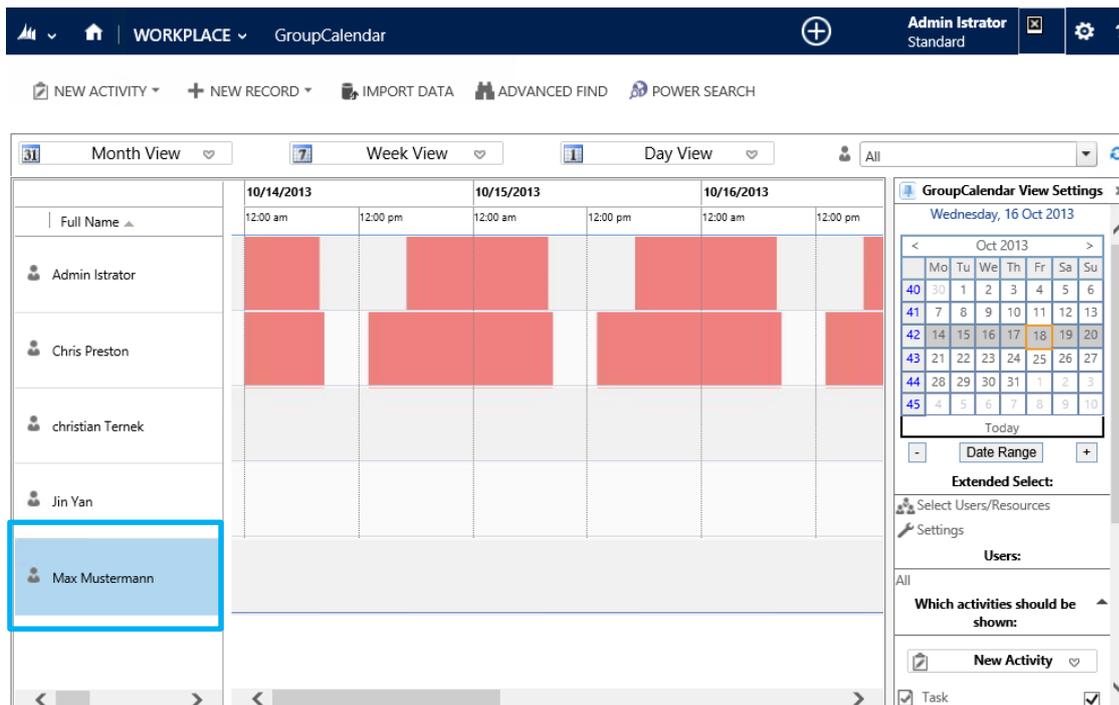
In the following window (see screenshot below) you have to define a name of the key in the "Name"-field, to set the "IsCached"-field on "yes" and to define a value in the "KeyValue"-field. Type in the following:

Name: EnableWorkingHours
IsCached: Yes
KeyValue: true

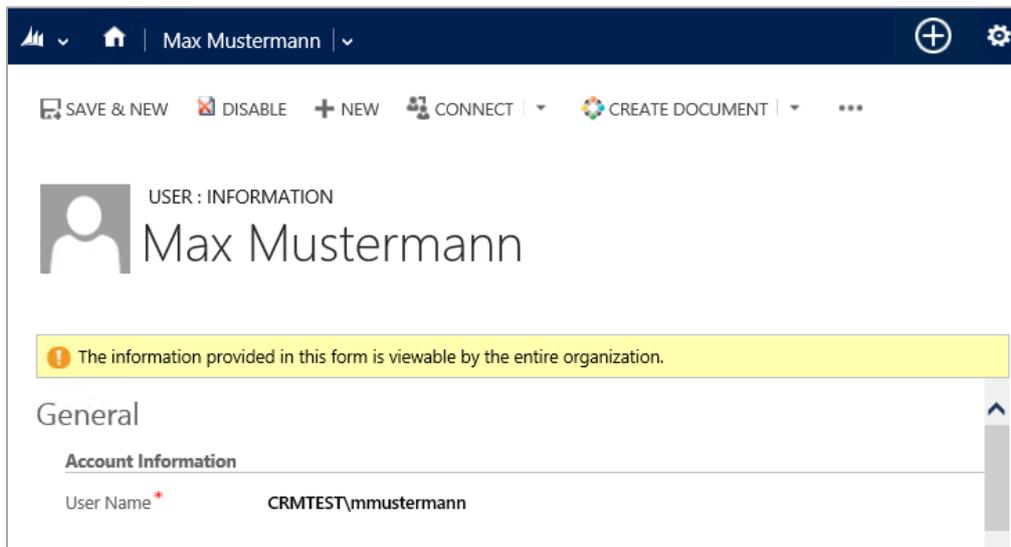


After you have typed in the values, click on "Save and Close" in the CRM menu at the top. To apply the changes, you have to run an IISRESET on the CRM server. Optionally, you can restart the GroupCalendarServer Application Pool within IIS on the CRM server.

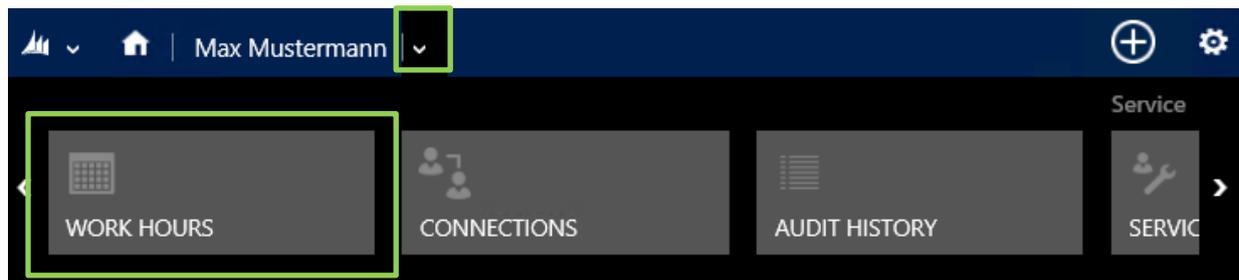
Go back to GroupCalendar's Gantt-View and click on the user for which you want to define the working hours. See Screenshot below:



This action will open the window you see below:



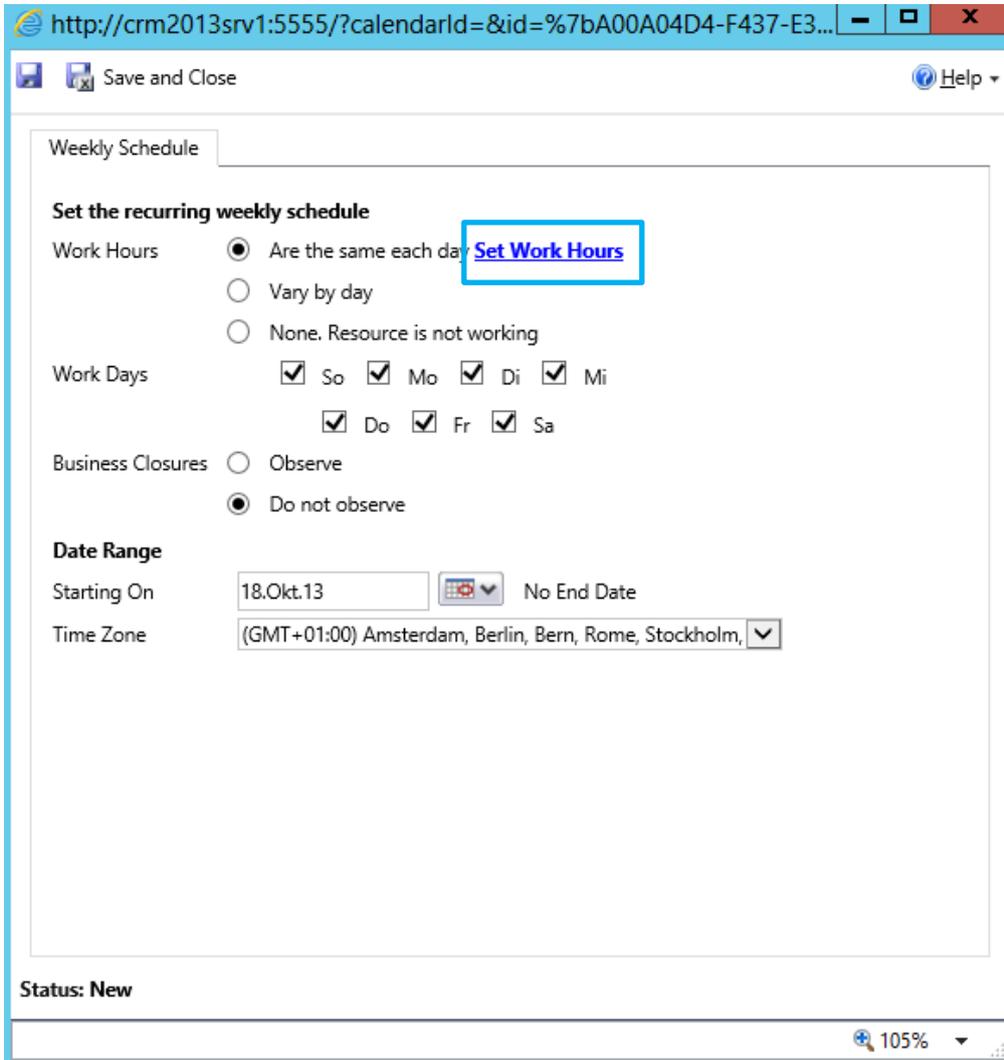
Within this window, click on the drop-down-button next to the user's name on the ribbon. There you can find the settings for the Work Hours.



This action will open the window you see below. Within this window click on the “Set up”-drop-down button and click on “New Weekly Schedule”:

The screenshot shows the user interface for Max Mustermann. At the top, there is a navigation bar with a home icon, the user name 'Max Mustermann', and a settings icon. Below this, the user's profile is displayed with a placeholder icon and the text 'USER : INFORMATION Max Mustermann'. A yellow warning banner states: 'The information provided in this form is viewable by the entire organization.' Below the banner, the 'Monthly View' tab is active. A 'Set Up' dropdown menu is open, showing three options: 'New Weekly Schedule' (highlighted with a blue border), 'Work Schedule for One Day', and 'Time Off'. The calendar grid below shows dates from 29 to 19, with each date containing an 'All Day' event. The days of the week are labeled as 'Mittwoch', 'Donnerstag', 'Freitag', and 'Samstag'. At the bottom, the status is shown as 'Enabled'.

Following window appears:



Weekly Schedule

Set the recurring weekly schedule

Work Hours Are the same each day [Set Work Hours](#)
 Vary by day
 None. Resource is not working

Work Days So Mo Di Mi
 Do Fr Sa

Business Closures Observe
 Do not observe

Date Range

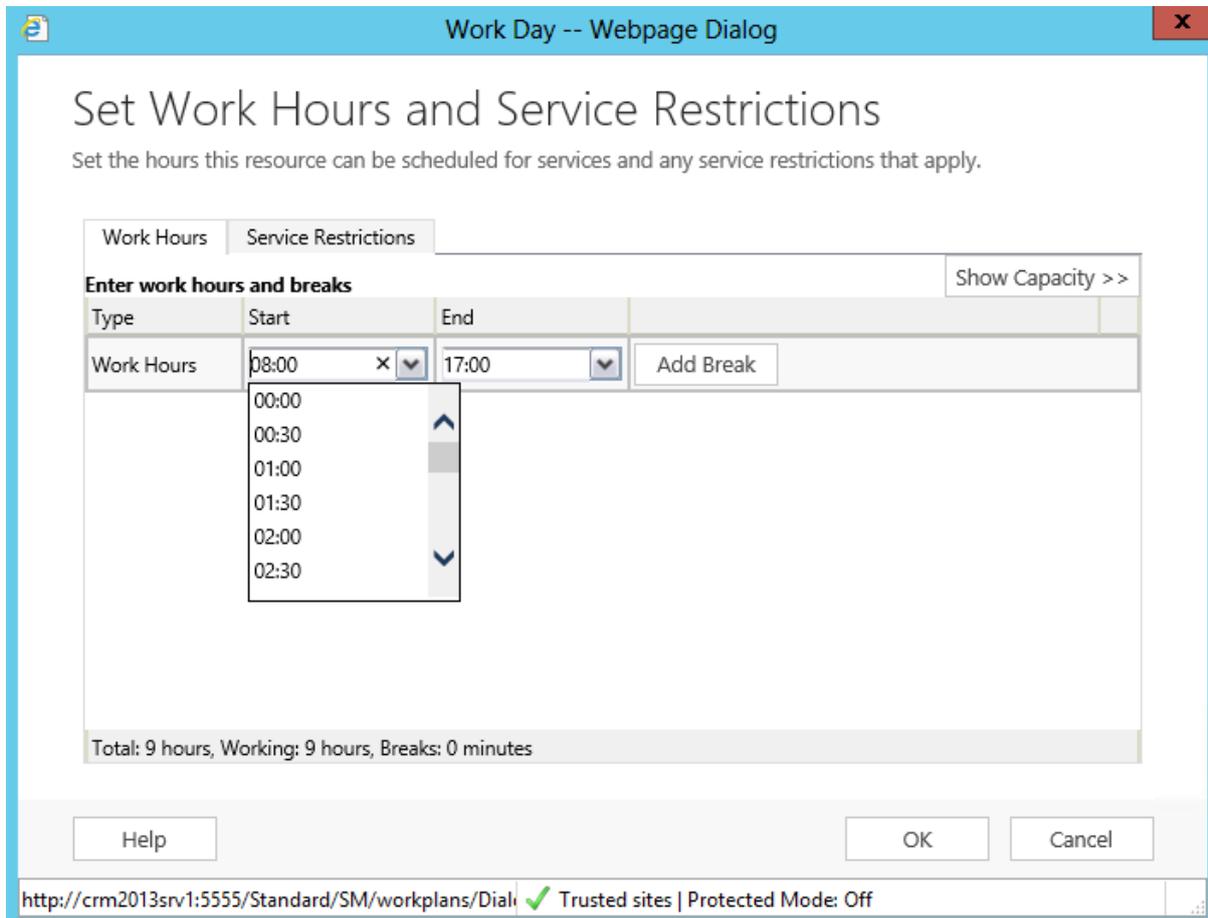
Starting On 18.Okt.13 No End Date
Time Zone (GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm,

Status: New

105%

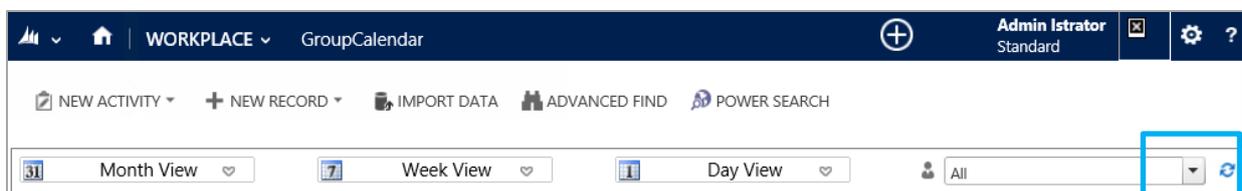
By check/uncheck the "Work Days" the work days can be defined. Within this window click on "Set Work Hours" to define the working hours.

This action will open the window you see below:

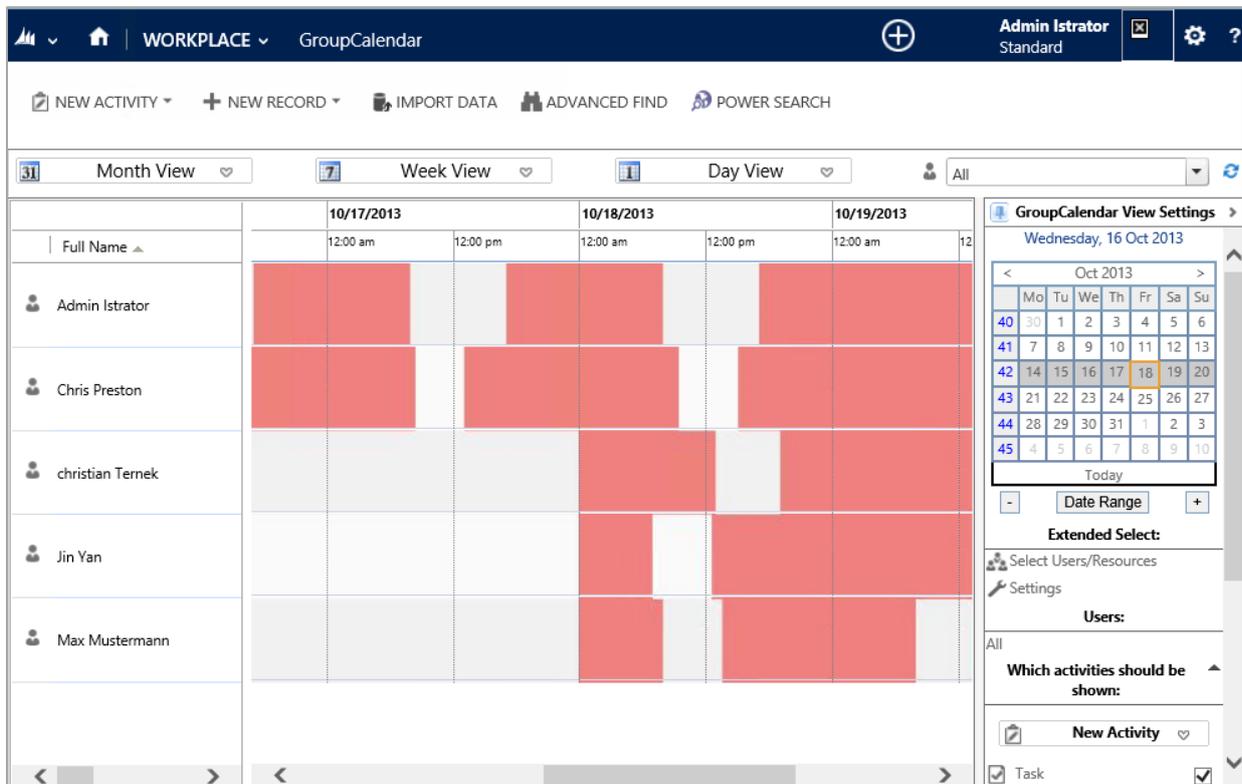


Enter the work hours and breaks. After that, click on [OK] and "Save and Close" your window.

Please note that, you have to click on the refresh button within your GroupCalendar's overview to retrieve your settings. See next screenshot:



After that you can see the set working hours:



11 Contact

If you have questions to the product send an email to

support@mscrm-addons.com

or visit our blog

<http://blogs.mscrm-addons.com>

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