

# 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: <u>http://blogs.mscrm-addons.com/post/2011/12/16/Install-GroupCalendar-for-MS-CRM-2011-Online.aspx</u>

### 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

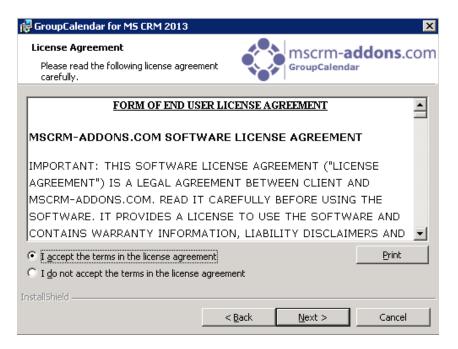
During the installation you have to specify at least one organization in which GroupCalendar will be installed.

### 4.1 Introduction

Click "NEXT" on the Welcome-Page.

• • • • • • • • • • • • • • • • • • •	_
Welcome to the Installer for GroupCale for MS CRM 2013 , Version 6.2	ndar
The Installer will install GroupCalendar for MS CRM 20 your computer. To continue, click Next.	)13 on
WARNING: This program is protected by copyright law international treaties.	w and
< Back Next > C	Cancel

# 4.2 EULA (End User License Agreement)

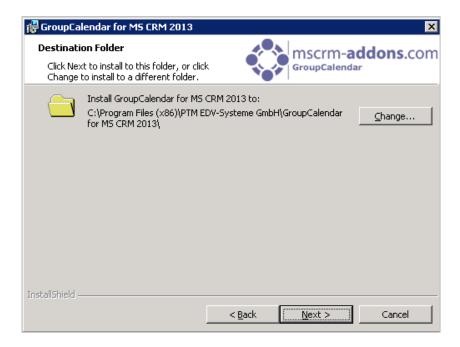


You have to accept the license and click "NEXT"



# 4.3 Folder Selection

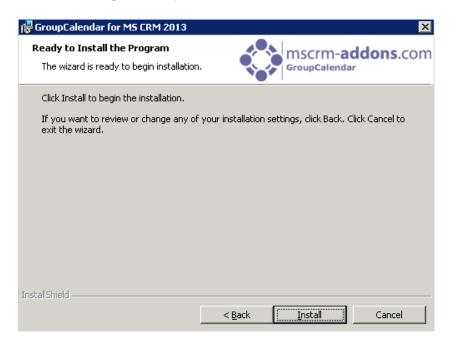
Choose the installation folder:



Click [Change] to specify a different installation path.

# 4.4. Confirm Installation

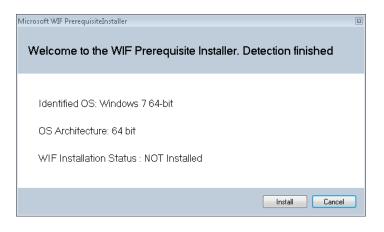
To start installing the GroupCalendar click "NEXT":





# 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 <u>here</u>.

Logon information		
Welcome to your CRM Connection	n setup.	
Please specify your connection details to a system administrator	connectto CRM. If you do not know the	connection details, please contact your
CRM Connection Advanced Settings Lo	og	
Existing Profiles		▼ Manage
Select your Crm Type		
Standard (onPremise)	IFD (Hosted)	🔿 Crm Online
CRM Server-Url:		
http://		
Use default Credentials Not enoug	h information to retrieve organizations	5
Username	Domain	Password
	Retrieve all Organizations	
- Organization information:		
Friendly name Unique name	ServiceURL	
Reset LivelD Cache		OK Cancel

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 CR	M Connection setu	р.			
Please specify your conne system administrator	ection details to connec	t to CRM. If you do not know the	connection det	ails, plea:	se contact your
CRM Connection Advar	nced Settings Log				
Existing Profiles [	HKLM] crm2013 - Contos	0		•	Manage
Select your Crm Type					
Standard (onPresident)	mise)	C IFD (Hosted)		C Crn	n Online
CRM Server-Url:					
http:// 🔻 crm20	D13				<b>*</b>
Authenticated as:					
🔽 Use default Creder	ntials Integrated Secu	rity (CONTOSO\administrator)			
Username	Do	main 🛛	Password		
		Retrieve all Organizations			
	-				
Organization information	1	1			
Friendly name	Unique name	ServiceURL			
Contoso	Contoso	Contoso			
Reset LivelD Cache			(	эк	Cancel

# 4.7 Server: Setup Website

GroupCalendar server : Setup Website	
Specify a unique port :	
GroupCalendar server is containing Webapplic	ations
Setup will now create a seperate Website for this product that will host a Webapplications. For this Website Setup requires a unique and unused por verify the default port suggested for this product is unoccupied or specify a p own	rt. Please
TCP Port* : 5558 (validity range : 0-65535)	
* Please note that setup will try to configure your firewall to allow this port t from the client computers	o be used
[	OK

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



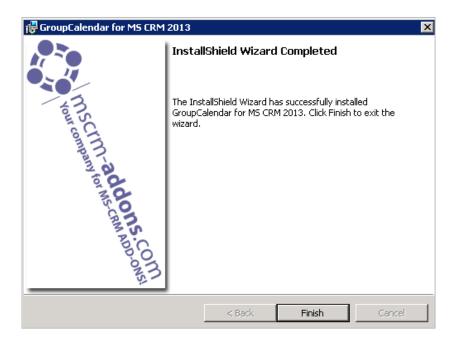
# 4.8 Time Format

Select the Time Format which should be used by GroupCalendar

j😽 GroupCal	endar for MS CRM 2013				. 🗆 🗙
-	GroupCalendar for MS CRM 20 ram features you selected are bein		GroupCaler	- <b>addons</b>	.com
<b>1</b>	Please wait while the InstallShield 2013 This may take several min Setup Timeformat C HH:mm (ex. 23.59) C hh:mm tt (ex. 12.59 pm)		lls GroupCalendar	o for MS CRM	
InstallShield —		< Back	Next >	Cano	el

# 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"

→ □ + Control Panel + Pr	ograms 👻 Programs and Features	- 😝	Search Programs and Featur	es
Control Panel Home	Uninstall or change a program			
View installed updates	To uninstall a program, select it from the list and the	en click Uninstall, Change, or R	epair.	
Turn Windows features on or off				
Install a program from the network	Organize 👻 Uninstall			) <b>III -</b> (
		Publisher	▼ Install ▼ Size	✓ Version
	GroupCalendar for MS CRM 2013	PTM EDV-Systeme GmbH		DMB 6.2
	Microsoft .NET Framework 4 Client Profile	Microsoft Corporation		3 MB 4.0.3031
	Microsoft .NET Framework 4 Extended	Microsoft Corporation	.11	9 MB 4.0.3031
	Microsoft .NET Framework 4 Multi-Targeting Pack	Microsoft Corporation	7/24/2013 83.4	
	Microsoft Dynamics CRM 2013 Reporting Extensions	Microsoft Corporation	-11	2 MB 6.0.0000
	Microsoft Dynamics CRM Server 2013	Microsoft Corporation		5 MB 6.0.0000
	Microsoft Help Viewer 1.1	Microsoft Corporation	.1=.1=	7 MB 1.1.4021
	🚺 Microsoft Lync Basic 2013	Microsoft Corporation	10/9/2013	15.0.442
	a Microsoft Online Services Sign-in Assistant	Microsoft Corporation		9 MB 7.250.41
	Microsoft Report Viewer 2012 Runtime	Microsoft Corporation	7/24/2013 26.2	2 MB 11.0.210
	Microsoft ReportViewer 2010 Redistributable	Microsoft Corporation	7/31/2013 42.	0 KB 10.0.303
	😪 Microsoft Silverlight	Microsoft Corporation	10/3/2013 20.5	5 MB 4.1.1032
	Microsoft SQL Server 2008 Native Client	Microsoft Corporation	7/31/2013 6.09	9 MB 10.1.253
	Microsoft SQL Server 2008 R2 Management Objects	Microsoft Corporation	7/24/2013 15.3	8 MB 10.51.25
	📃 Microsoft SQL Server 2008 Setup Support Files	Microsoft Corporation	7/24/2013 39.4	MB 10.1.273
	📑 Microsoft SQL Server 2012 (64-bit)	Microsoft Corporation	7/24/2013	
	Microsoft SQL Server 2012 Data-Tier App Framew	Microsoft Corporation	.1=.1=	MB 11.1.281
	📑 Microsoft SQL Server 2012 Management Objects	Microsoft Corporation	7/24/2013 15.9	9 MB 11.0.210
	Microsoft SQL Server 2012 Management Objects	Microsoft Corporation	7/24/2013 25.6	5 MB 11.0.210
	Microsoft SOL Server 2012 Native Client	Microsoft Corporation	7/24/2013 7.23	2 MB 11 1 300
	PTM EDV-Systeme GmbH Product vers	sion: 6.2	Support link: <u>www.mscrm</u>	-addons.com
	Help	link: www.mscrm-addons.com	Size: 66.0 MB	



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.

Programs and Features				
Are you sure you want to uninstall GroupCa	lendar for MS CRM 2013?			
☐ In the future, do not show me this dialog box	Yes No			

It may take a few minutes to uninstall GroupCalendar.

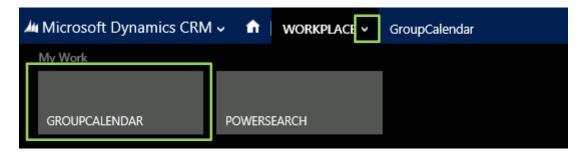
# 6 Testing the Installation

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"

Microsoft Dynamics CRN 🛛 🗸 📩 SALES 🗸 🛛 Dashboards 🛛 🗸				
SALES	WORKPLACE	SERVICE	MARKETING	SETTINGS

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:

- IFD-Tool -<u>http://www.mscrm-</u> addons.com/Downloads/DownloadIFDToolforMSCRM2011/tabid/195/ctl/Login/Default.aspx?ret urnurl=%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: <u>http://www.mscrm-addons.com/Downloads/tabid/32/Default.aspx</u>
- **4.** For installing DocumentsCorePack you need at least version 5.18 from our download Section: <u>http://www.mscrm addons.com/Downloads/tabid/32/Default.aspx</u>

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

External Url used to access Microsoft Dynamics CRM: <u>https://[orgname].rc1ifd.ptm-edv.at</u>

AD FS Server: https://win2008domain.ptm-edv.at

The Addon itself also requires a dns name: <u>https://activitytoolsserver.rc1ifd.ptm-edv.at</u> or

https://groupcalendarserver.rc1ifd.ptm-edv.at or

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



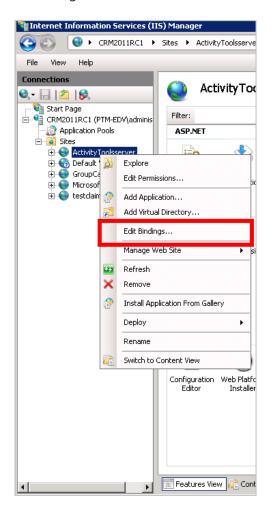
Basic installation/configuration of our Add-On:

- **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.

gon information		кок Г		
Velcome to your	CRM Connection se	tuy.		
lease specify your coi ystem administrator	nnection details to conn	ectto CRM. If you do not know t	he connection (	details, please contact yo
CRM Connection Pro	xy Settings Log			
Existing Profiles				▼ Manage
Select your Crm Typ	e			
C Standard (onF	<sup>o</sup> remise)	IFD (Hosted)		C CRM Online
https:// 💌 linte	ernalcrm.rc1ifd.ptm-e	dv.at		
-Authenticated as: -				
	dentials <b>ptm-edv.at\a</b> c	Ininistrator		
Username admini	strator [	Domain ptm-edv.at	Password	*****
		Retrieve all Organizations		
0 1 6 1 6	tion:			
Organization informa	Linimus mana	CanvicaLIDI		
Friendly name	Unique name	ServiceURL		
Friendly name	playground	playground		
Friendly name				
Friendly name	playground r2d2	playground r2d2		
Friendly name	playground r2d2 cternek	playground r2d2		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 ActivityToolsserver 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

e Bindings				?
Type Host Name	Port	IP Address	Binding	Add
Add Site Binding				? ×
<u>Type:</u> https	IP address:		P <u>o</u> rt:	t tove
Host name:				wse
<u>S</u> SL certificate:				
CRM Wildcard Cert	Rc1	•	⊻iew…	bse
		OK	Cance	:

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

Microsoft Dynamics CRIU - A SALES - Dashboards  -									
°~	#	24	. 📢	<b>\$</b>					
SALES	WORKPLACE	SERVICE	MARKETING	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:

🚈 🗸 🏦 🛛 SETTINGS 🗸 🛛 Business Manage	em			$\oplus$	₽
Extensions	v Dons.co	POWERSE/	ARCH CONFIG		
/// → ft settings → MSCRM-ADDONS.c	.  ~			$\oplus$	<b>(</b>
🕂 NEW 💉 EDIT 🗸 ACTIVATE 🛛 DEACTIVATE	面 delete 👻	•••			
➡ Active MSCRM-ADDONS	.com Pr	~	Search	for records	
✓ Name ↑	Product Type	Created By	Created On		
✓ GroupCalendar	server	CRM System	10/10/2013 1:1	0 AM	
Plugin	server	CRM System	10/2/2013 3:0	9 AM	
PowerSearch	server	CRM System	10/2/2013 3:0	8 AM	
TelephoneIntegration	server	CRM System	10/3/2013 3:1	1 AM	



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:

🗸 🏦 SETTINGS 🗸	MSCRM-ADDONS.c   🗸 Grou	upCalendar 🗸	$\oplus$	CRM Syste Contoso
Common		Process Sessions		
	ತರು	Ċ	Ĉ.	
audit History	MSCRM-ADDONS.COM SE	BACKGROUND PROCESSES	REAL-TIME PRO	CESSES
( ↓ 🏫 SETTINGS ↓ MS	CRM-ADDONS.c   🗸 GroupCalen	dar   • 🕀	CRM System Contoso	" <u>//</u> 🌣
				ή ψ
MSCRM-ADDONS.COM PRODUCT	S : INFORMATION			
GroupCalend	ar			
MSCRM-ADDONS	5.com Settingsk 👻	Search for re	ecords	ţ
	ADD EXISTING MSCRM-A 🖟 BULK DE	LETE		
	KeyValue	IsCao	ched Created O	n <b>T</b>
✓ Name ↑				

**9.** Open the WebApplicationPort and replace the existing KeyValue with the following: [httpsPort]|[httpPort]|[claimsbased]|[addonname]|[debugging] e.g.: 4446|5557|true|activitytoolsserver|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, <u>https://activitytoolsserver.rc1ifd.ptm-edv.at:4446/FederationMetadata/2007-</u>06/FederationMetadata.xml

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

- 5. Click Next.
- 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 thePass 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. tokens from this issuer, configure the IssuerNameRegistry to return a valid name for this is	
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	t originated in the code.
Exception Details: System.Identity/Model.Tokens.SecurityTokenException: ID4175: The issuer of the security token was not recognized by the issuerNameRegistry. To acception configure the issuerNameRegistry to return a valid name for this issuer.	t security tokens from this issuer,
Source Error:	
An unhandled exception was generated during the execution of the current web request. Information regarding location of the exception can be identified using the exception stack trace below.	the origin and
Stack Trace:	
[SecurityTokenException: ID4175: The issuer of the security token was not recognized by the IssuerNameRegistry. To accept : 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 endpu Microsoft.IdentityModel.Web.WSFederationAuthenticationModule.SignInWithResponseMessage(HttpRequest request) +615 Microsoft.IdentityModel.Web.WSFederationAuthenticationModule.OnAuthenticatRequest(Object sender, EventArgs args) +521 System.Web.SyncEventExecutionStep.System.Web.HttpApplication.IExecutionStep.Execute() +80 System.Web.HttpApplication.ExecuteStep(IExecutionStep step, Boolean& completedSynchronously) +270	



### 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 <u>support@mscrm-addons.com</u>



# 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 <u>mscrmaddonsazureservice@hotmail.com</u> 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 namedMSCRMAddonsAzureService 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 "mscrmaddonsservice" 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 <u>support@mscrm-addons.com</u>. 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 <u>support@mscrm-addons.com</u>. 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

Microsoft Dynamics CRU								
*c	ŧ	ىر <sup>ى</sup>	4	\$				
SALES	WORKPLACE	SERVICE	MARKETING	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:

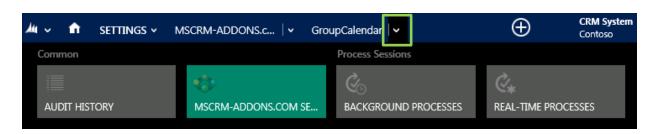
4	• ~	ń	SETTING: •	Βι	ısiness Managem			$\oplus$	¢
<	<b>*</b>	CRM-A	DDONS.CO	~	MSCRM-ADDONS.CO	<	POWERSEARCH CONFIG		

🚈 🗸 🏫 settings 🗸 MSCRM-ADDONS.c	<b>~</b>		$\oplus$
🕇 NEW 🖌 EDIT 🗸 ACTIVATE 🛛 DEACTIVATE	💼 delete 👻		
➡ Active MSCRM-ADDONS.			Search for records
✓ Name ↑	Product Type	Created By	Created On
✓ GroupCalendar	server	CRM System	10/10/2013 1:10 AM
Plugin	server	CRM System	10/2/2013 3:09 AM
PowerSearch	server	CRM System	10/2/2013 3:08 AM
TelephoneIntegration	server	CRM System	10/3/2013 3:11 AM

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

### Installation Guide





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

i v ท	Settings ~	MSCRM-ADD	DNS.c   🗸	GroupCalendar			$\oplus$	CRM System Contoso		¢
MSCRM-AD	DONS.COM PRO	DUCTS : INFORM	ATION							
Grou	ıpCaler	ndar								
		DNS.com	Setting	ick v		Sear	ch for records			2
				R BULK DELETE						
_		. Es ADD EXIST	NG MISCRIM-A	LE DOLK DELETE	III CHARTPANE					
✓ Name ↑			KeyV	alue		IsCached	Created 0		1	T é
AllowExpo			true			Yes		L3 1:10 AM		
	entColorCode			DAB9;2 #FFFF00;3 #FF8	3C00;4 #00FF00;5 #ADFF	Yes		L3 1:10 AM		
cbxactstar			true			Yes		13 1:10 AM		
cbxappoir			true			Yes		13 1:10 AM		
cbxattend	lees		true			Yes		L3 1:10 AM		
cbxemail			false			Yes		13 1:10 AM		
cbxfax			false			Yes		L3 1:10 AM		
cbxletter			false			Yes		13 1:10 AM		
cbxonlyat			false			Yes		13 1:10 AM		- 1
cbxonlyop			false			Yes		L3 1:10 AM		
cbxowner			true			Yes		L3 1:10 AM		
cbxservice	eactivity		true			Yes		L3 1:10 AM		
cbxtask			true			Yes		L3 1:10 AM		
cbxTDDat	-		false			Yes		L3 1:10 AM		
cbxteleph			false			Yes		13 1:10 AM		
colposatte			6 10			Yes		L3 1:10 AM		
colposdes						Yes		13 1:10 AM		
colposeno			2			Yes		13 1:10 AM		
colposioc			9 7			Yes		13 1:10 AM		
colposorg			,			Yes		12 1.10 AM		`
1 - 50 of 66			-						l∉ ∉ Pag	ge l 🕨
	A B C	DEF	GН	ТІК	L M N O	P O R	S T I	u v w	ХY	z

▲4 ~ <b>↑</b> SE	TTINGS 🗸 MSCRM-ADDONS.c 🛛 🗸 cbxemail 🗍 🗸	$\oplus$	CRM System Contoso
+ NEW [ 👌 DEA	ACTIVATE 🏢 DELETE 🖘 EMAIL A LINK 🔹 RUN WORKFLOW 🚥		↑↓ ,≂
mscrm-addon cbxem	NS.COM SETTINGSKEYS : INFORMATION		
General			
Name*	cbxemail		
IsCached *	Yes		
KeyValue	false		



KEY	DESCRIPTION
Language	en English
	de German
	fr French
	Per default the CRM User Language is used. But when this language does not exist for GC, the language configured here is used.
	Each label in the GroupCalendar can be customized.
	So it is no problem for you to add new languages.
	To add a new language go to the subdirectory
	"App_Data\localization". There you will find en.xml, de.xml,
	Copy the en.xml file save as xy.xml.
	Change the entries in the xy.xml file and after that change
	the Language Value in the settings entity to "xy"
TimeFormat	HH:mm 24Hour-Format(ex. 23:59)
	hh:mm tt 12Hour-Format (ex. 12:59pm)
CalendarWeekRule	Possible Values:
	- FirstDay
	- FirstFourDayWeek
	- FirstFullWeek
	Specifies the rule how the week number should be calculated
ignoreStartDateTask	All fields identify, if the activity is shown on the due date
ignoreStartDateLetter	(minus duration) only, or shown from start date to end date.
ignoreStartDateFax	Possible Values:
ignoreStartDateEmail	- true: Activity is shown from due date minus duration till
ignoreStartDatePhonecall	due date
	- false: activity is shown from start date till due date
cbxtask	Default-value for the checkbox TASK
cbxfax	Default-value for the checkbox FAX
cbxtelephone	Default-value for the checkbox TELEPHONE
cbxemail	Default-value for the checkbox EMAIL
cbxletter	Default-value for the checkbox LETTER
cbxappointment	Default-value for the checkbox APPOINTMENT
cbxonlyattendees	Default-value for the checkbox ONLYATTENDEES
cbxonlyopen	Default-value for the checkbox ONLYOPEN
ShowAllActivities	Shows all activities a user is allowed to see.
cbxattendees	Show Attendees/Regarding Columns
cbxactstart	use only the actual start field for searching
cbxowner	Show OwnerColumn



КЕҮ	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)

4iv n∩ s	ettings 🗸	Customizations	New Appo	pintment				$\oplus$	CRM Syster Contoso	" 📈 🏼
🕞 SAVE 🗸 M	IARK COMPLETE	€ RECURRENCE	🔳 FORM	₯ POWER SEARCH	ł					$\uparrow \downarrow$
APPOINTMENT	•									
New A	Appoir	ntment				Pric	rity rmal	Status* Open		Owner CRM System
Required										
Optional										
Subject *	8									
Location										
Regarding										
Color	Peach Yellow		^							
	Dark Or	ange	~							
Start Time *	10/10/2	013 5:30 AM	All E	Day Event						
End Time*	10/10/2	013 6:00 AM	Dura	ation	30 minutes					



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)

		CRM -	PLACE - GroupCalenc			🕀 Create	Michael Dohr 🛛 🔅 ? Standard
31	Month View 👳	-,	Week View ∞		Day View 🛛 🛇	& All	• 0
			Мау	2013			GroupCalendar View Settings >
	Mon	Tue	Wed	Thu	Fri	Sat/Sun	Wednesday, 29 May 2013
17	Apr 22	23	24	25		27 07:30em DYN07 Growing Your Micre 06:00em SMB12 Using Sales Leads T 28 06:30em WEB04: High Impact Bu A 06:30em SMB02 Increasing Prod. V	Moy         Tu         We         Th         Fr         Sa         Su           18         29         30         1         2         3         4         5           19         6         7         8         9         10         11         12           20         13         41         5         16         17         18         9           12         20         21         22         23         24         25         26           22         27         28         29         30         31         1         2
. 1	29	30	May 1	2	3	4	23 3 4 5 6 7 8 9
	06:30am SMBVK How We Win in SMB	04:15am WIN13i Windows Licensing	Meeting with dev-team	06:45am WEBVK Get Inspired with th	04:02am WEB06 Don't Build it from S	10:30am SMB09 Capture the SMB De	Today
	07:15am TEL02 Moving Productivity A	05:30am SMB11i Winning SMB Custor	08:00am WEB05 Improve Business Pe	07:30am TEL05 Moving Information V	07:30am WP10i Enterprise Mobility: V	02:00pm WIN03 Deploying Windows	Extended Select:
18	08:20am BL01 How to Prepare Now f	07:30am DYNVKR Be Dynamic: Oppo	08:30am Test	11:00am DYN10 Driving Success with	08:15am TEL08 Microsoft Lync Voice	5	Settings
	09:30am WP02 The Five Things You 01:40pm WINVK Enabling Today's Fle	10:50am WP06 Windows Phone in the 11:55am BL10R MPN Program Evoluti	09:00am SC01 High Performance Con 09:45am SMB03 Selling Windows to S	05:00pm BL07 Letting Go to Grow: Bo	10:30am BL12 Making the Most of MR		<i>*</i>
	us. Topin waters chabing todays he	12:30pm Test Task	10:45am DYN20 Microsoft Dynamics 0				Users:
- [	6	7	8	9	10	11	Users:
							All
							Which activities should be shown: *
19						12	New Activity v
							Task 🗹
	13	14	15	16	17	18	C Phone Call
							Email
							E Letter
20						19	Appointment V
							Service Activity
	20	21	22	23	24	25	
21							
21						26	
							Options:
							Only attendees:
	27	28	29	30	31	Jun 1	Only open:
					08:00am APPOINTMENT XY 10:00am MEETING	30114	TopDown activities only
22					12:30pm asdf	2	
							Print Preview
							debug

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 activityentity. 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 appointmententity. 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):

Microsoft Dynamics CRM v n   SALES v Dashboards   v										
SALES		SERVICE	MARKETING	SETTINGS						
Lu → A SETTINGS → C	Customizations		÷	CRM System 2007						
Business BUSINESS MANAGEMENT	TEMPLATES	PRODUCT CATALOG	Customization CUSTOMIZATIONS	* SOLUTIONS						
للاس n settings ۲۰۰۰ c	ustomizations		Ð	CRM System Contoso						
₯ Power search Customization										
Which feature would you like t	to work with?									
	em components in your organization. Compo s, forms, reports, processes, and others.	onents include	Publishers Create, modify or delete a solution publisher.							
Solutions Create, modify, export, or i	import a managed or unmanaged solutio	on. 💽	Developer Resources View information or download files that help extensions for Microsoft Dynamics CRM.	you develop applications and						



**2.** 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)

ile 🛃 🛃 Save and Close	i 🗐 🔤 Export Solution	0019b9312238%7d - Solution: D			Actions +	_ 🗆 🔉
Solution: Default Solution						
ution Default Solution	Component Type Entity		View Customizable			~
Information		o Publish 🛛 🚭 Show Dependencies	Managed Properties			
Components	✓ Display Name 个	Name	Schema Name	State	Customizable	Audit 💰
Option Sets	Account	account	Account	Managed	True	Disablec
Web Resources	Activity	activitypointer	ActivityPointer	Managed	True	Non Ap
♣ Processes → +□ Plug-in Assemblies	Address	customeraddress	CustomerAddress	Managed	True	Disablec
Sdk Message Processing S	Appointment	appointment	Appointment	Managed	True	Disablec
🎲 Service Endpoints 🔛 Dashboards	🗟 Article	kbarticle	KbArticle	Managed	True	Disablec
Reports	Article Template	kbarticletemplate	KbArticleTemplate	Managed	True	Non Apj
Article Templates	🗎 Business Unit	businessunit	BusinessUnit	Managed	True	Disablec
Contract Templates Email Templates	Campaign	campaign	Campaign	Managed	True	Disablec
Mail Merge Templates	🍤 Campaign Activity	campaignactivity	CampaignActivity	Managed	True	Disablec
Security Roles Security Profiles	📢 Campaign Response	campaignresponse	CampaignResponse	Managed	True	Disablec
	🔑 Case	incident	Incident	Managed	True	Disablec
	📸 Case Resolution	incidentresolution	IncidentResolution	Managed	True	Disablec
	💯 Chat	ptm_chatactivity	ptm_chatActivity	Managed	True	Disablec
	<			-		>
	1 - 50 of 104 (0 selected)					🛛 🖣 Page 1 🕽

**3.** 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'.)

http://crm2013/?id=%7bf	d140aaf-4df4-11dd-bd17-0019b9	9312238%7d - Solution: Def	ault Solution - Mi - Dashl	boards: Sales Act	ivity So	_ 🗆 ×
File	i 🚽 🛛 🖓 Export Solution 🖉 🗿 Im	nport Translations 🛛 🗟 Export Tr	anslations 🛛 👔 Publish All	Customizations 🤺	Actions +	🕜 <u>H</u> elp -
Solution: Default Solution						
Solution Default Solution	Component Type Entity		View Customizable			~
Components	👼 New 🛛 🗙 Delete 🛛 🚺 Publis	sh 🛛 📲 Show Dependencies	Managed Properties			
Entities	✓ Display Name ↑	Name	Schema Name	State	Customizable	Audit 🤁
Option Sets	Account	account	Account	Managed	True	Disablec 🔨
💽 Web Resources	Activity	activitypointer	ActivityPointer	Managed	True	Non Ap
Processes Hug-in Assemblies	Address	customeraddress	CustomerAddress	Managed	True	Disablec
Sdk Message Processing S	✓ 🗂 Appointment	appointment	Appointment	Managed	True	Disablec
🎲 Service Endpoints 🔛 Dashboards	Article	kbarticle	KbArticle	Managed	True	Disablec
📑 Reports	Article Template	kbarticletemplate	KbArticleTemplate	Managed	True	Non Apj



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

ile	tions				🔞 <u>H</u> el
Appointment					
ution Default Solution	System Forms Active For	ms ¥			
Components	🗙 🛛 🍕 Enable Security Roles	: 🛛 👼 Form Order 🖌 🕅 Mo	re Actions 👻 💋 Activate	🙀 Deactivate	
Entities     Account	Name	Form State	Form Type 🛧 State	Customizable	Description 6
Activity     Address	Information	Active	AppointmentBook Manag	ged True	This form displays an appointm
Appointment	Appointment	Active	Main Manag	ged True	Updated default Appointment
Forms Views	Wizard	Active	Main Manag	ged True	Appointment form for use in th
Charts	Information	Active	Mobile Manag	ged True	This is the form that is displaye
1:N Relationships					
N:1 Relationships					
器 N:N Relationshi					
All Messages					
Business Rules					
Article					
Article Template	<				>
Business Unit					

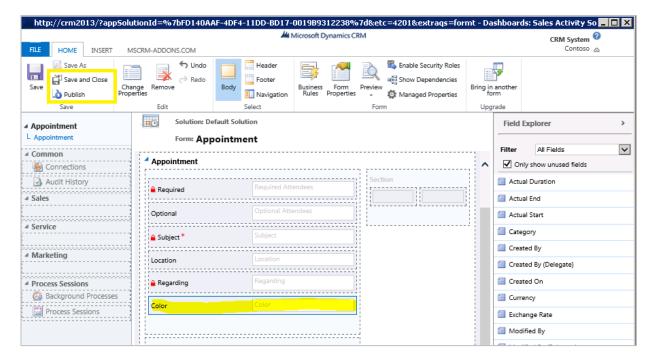
**5.** Afterwards, you get a list of the forms of the appointment-entity. Double-click on the main-form of the entity. (See screenshot below)

http://crm2013/?id=%7bf		af-4df4-11dd-bd17-0019	b9312238%7d# - Solu	tion: Default Solut	ion - M - Da	shboards: Sales Act	ivity So	2
Appointment								
olution Default Solution	Syst	tem Forms Active Form	s ¥					
Components	×	鶅 Enable Security Roles	Form Order 🖌 More	Actions 👻 🛛 🧖 Acti	vate 🛛 🎉 D	Deactivate		
Entities     Entities     Account	-	Name	Form State	Form Type 个	State	Customizable	Description	0
Activity		Information	Active	AppointmentBook	Managed	True	This form displays a	n appointme
Address Appointment	~	Appointment	Active	Main	Managed	True	Updated default Ap	pointment f
Forms		Wizard	Active	Main	Managed	True	Appointment form f	ior use in th
📅 Views		Information	Active	Mobile	Managed	True	This is the form that	is displayed
📒 Fields 😋 1:N Relationships								
N:1 Relationships								
😽 N:N Relationshi								
Business Rules								
<ul> <li>Article</li> <li>Article Template</li> </ul>								
Ardicle remplate	<	-						>
🔈 🙀 Campaign 🛛 🗸 🗸	1 -	4 of 4 (1 selected)						
tatus: Existing								



**6.** 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)

<u>"hi</u> htti	p://crm2013/?ap	pSolutio	nId=%7bFD1	40AAF-4DF4		D19B93122389 crosoft Dynamics (		c=4201&extraqs=for	mt - Da	ashboard	ls: Sales Activity So CRM System	-
FILE	HOME INSERT	r MSCF	M-ADDONS.COM								Contoso	
Save	Save As Save and Close Publish Save	Change Propertie	Remove Edit		Header Footer Navigation	Business Rules Propertie	Preview 5	Enable Security Roles Show Dependencies Managed Properties		another prm		
<u> </u>				on: Default Sol			1011		ops	·	r	
	pintment pintment									Field	Explorer	
		,	Form:	Appointm	nent					Filter	All Fields	$\checkmark$
⊿ Com			Appointmen	t					<b>`</b>		ly show unused fields	
Receive:	Connections						. Sect	ion	1		-	
<u>}</u>	Audit History		🔒 Required		Required Atten	dees				<u> </u>	al Duration	^
✓ Sales	5									📒 Actu	al End	
			Optional		Optional Atten					📒 Actu	al Start	
4 Servi	ice		🔒 Subject *		Subject				-	📒 Cate	gory	
										Colo	r	
⊿ Mari	keting		Location		Location					Crea	ted By	
}					Description					<u> </u>	ted By (Delegate)	
	ess Sessions		🔒 Regarding		Regarding							
20000000	Background Process	es								Crea	ted On	
	Process Sessions		I							Curre	ency	
			Scheduling I	nformation			,			Exch	ange Rate	
			🔒 Start Time *	Start Time	All Day Event	All Day Event				Mod	ified By	
				End Time		Duration				Mod	ified By (Delegate)	
			🔒 End Time *	chu time	Duration	Duradon				Mod	ified On	
										_		
										C Orga		
			Description							Cwn	er	
	Description						1			Prior	itv	





**7.** 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
- **1.** 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)

Microsoft Dynamics CR I v n SALES v Dashboards   v										
SALES	H WORKPLACE	SERVICE	MARKETING	SETTINGS						
<sup>⊥</sup> u ~ ↑ SETTING <mark>S</mark> ~ (	Customizations		÷	CRM System Contoso						
Business BUSINESS MANAGEMENT	TEMPLATES	PRODUCT CATALOG		solutions						



<i>▲</i> ~ ↑	SETTINGS - Customizations		CRM System A ?
🔊 POWER	SEARCH		
Custom	ization		
Which fea	ture 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.	8	Publishers Create, modify or delete a solution publisher.
*	Solutions Create, modify, export, or import a managed or unmanaged solution.		Developer Resources View information or download files that help you develop applications and extensions for Microsoft Dynamics CRM.

2. 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 dropdown-menu within another activity entity, you have to select another activity within this step.

http://crm2013/?id=%7bfe	d140aaf-4df4-11dd-bd17-0019b	9312238%7d - Solution: Def	ault Solution - Mi - Dashb	oards: Sales Act	ivity So	
File	🗿 🛛 🌄 Export Solution 🛛 📓 Ir	mport Translations 🛛 🗎 🖹 Export T	ranslations 🛛 👔 Publish All	Customizations 🤺	Actions +	
Solution: Default Solution	I					
Solution Default Solution	Component Type Entity		View Customizable			$\checkmark$
Information Components	🗟 New 🛛 🗙 Delete 🛛 🔥 Publi	ish 🛛 📑 Show Dependencies	Managed Properties			
Entities	✓ Display Name ↑	Name	Schema Name	State	Customizable	Audit 🤁
Option Sets	Account	account	Account	Managed	True	Disablec 🔨
Web Resources	Activity	activitypointer	ActivityPointer	Managed	True	Non Ap
Processes + Plug-in Assemblies	Address	customeraddress	CustomerAddress	Managed	True	Disablec
Sdk Message Processing S	✓ 🗂 Appointment	appointment	Appointment	Managed	True	Disablec
Service Endpoints Dashboards	Article	kbarticle	KbArticle	Managed	True	Disablec
Reports	Article Template	kbarticletemplate	KbArticleTemplate	Managed	True	Non Apj



**3.** Then, click on 'Fields' within the menu on the left and double-click on the field 'ptm\_colorcode2011'. (See screenshots below)

ile	zations					@ <u>H</u> elj
Appointment						
ution Default Solution	View: All					~
Components	🔨 🕞 New   🗙   Edit   r	More Actions 👻				
Account	✓ Name	Schema Name 🛧	Display Name	Туре	State	Audit 💰
<ul> <li>Activity</li> <li>Address</li> </ul>	owningteam	OwningTeam	Owning Team	Lookup	Managed	Non Apr
🔺 📩 Appointment	owninguser	OwningUser	Owning User	Lookup	Managed	Non Apr
🖃 Forms 📅 Views	prioritycode	PriorityCode	Priority	Option Set	Managed	Enabled
Charts	processid	ProcessId	Process	Unique Identifier	Managed	Enabled
📬 1:N Relationships	ptm_colorcode2011	ptm_colorcode2011	Color	Option Set	Managed	Disabled
N:1 Relationships N:N Relationshi	regardingobjectid	RegardingObjectId	Regarding	Lookup	Managed	Enabled
Messages	requiredattendees	requiredattendees	Required Attend	Party List	Managed	Enabled
Article	scheduleddurationminute	s ScheduledDurationMinutes	Duration	Whole Number	Managed	Enabled
Image: Article Template Image: Image: Description of the second secon	scheduledend	ScheduledEnd	End Time	Date and Time	Managed	Enabled
Campaign	scheduledstart	ScheduledStart	Start Time	Date and Time	Managed	Enabled
<ul> <li>Campaign Activity</li> <li>Campaign Response</li> </ul>	<					>
Campaign Response	1 - 50 of 52 (0 selected)					I III III Page 1 ▶



**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)

http://crm2013/?app5olutionI	d=%7bFD140AAF-4DF4-	11DD-BD17-0019B9312238%7	d&attributeId=%7b1	88D3D5 - Dashboards: Sales A	
File	🔓 🛛 📲 Show Depender	ncies 🛛 🚰 Managed Properties	<u>∕&amp;A</u> ctions <del>-</del>	(	<u> </u>
Field Color of Appointme	ent			Working on solution: Default S	olution
▲ Common	General				_
📒 Information	Schema				~
📴 Business Rules	Display Name *	Color	Field Requirement *	Optional 🗸	
	Name *	ptm_colorcode2011	Searchable	Yes	
	Field Security	🔵 Enable 💿 Disable			
	Auditing *	🔵 Enable 💿 Disable			
		${f \Lambda}$ This field will not be audited	until vou enable auditing	on the entity.	
	Description			on the entry.	
	D CDC I plicit				
	For information about how	w to interact with entities and fields	programmatically, see the	Microsoft Dynamics CRM SDK	
	Туре				
	Type*	Option Set	$\checkmark$		
	Use Existing Option Set	Ves No			
	Default Value	Unassigned Value	$\checkmark$		
	Options		_		
	🕂 🔁 🚯 🔁 🖶	Z ↓	Label *	light grey	
	light grey		Value *	100,000,000	1
	Peach	^			i -
	Yellow Dark Orange		Description		
	Dark Orange Green				
	Green Yellow				
	Cyan				~
			11		



**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)

le Publish All Customizati	ons					(⊘ <u>H</u> €
Appointment						
Fields						
tion Default Solution	View: All					•
Components	ঝ New   🗙   Edit   N	Nore Actions 👻				
Account	✓ Name	Schema Name 🛧	Display Name	Туре	State	Audit
Activity     Address	activityid	ActivityId	Appointment	Primary Key	Managed	Non Apr
▲ ☐ Appointment	activitytypecode	ActivityTypeCode	Activity Type	Option Set	Managed	Enabled
🗐 Forms 🛗 Views	actual duration minutes	ActualDurationMinutes	Actual Duration	Whole Number	Managed	Enabled
📫 Charts	actualend	ActualEnd	Actual End	Date and Time	Managed	Enabled
Fields 1:N Relationships	actualstart	ActualStart	Actual Start	Date and Time	Managed	Enabled
N:1 Relationships	category	Category	Category	Single Line of Text	Managed	Enabled
A Messages	createdby	CreatedBy	Created By	Lookup	Managed	Non Apr
Business Rules ▷ Q Article	createdon	CreatedOn	Created On	Date and Time	Managed	Non Apr
<ul> <li>Article Template</li> <li>Business Unit</li> </ul>	createdonbehalfby	CreatedOnBehalfBy	Created By (Dele	Lookup	Managed	Non Apr
Campaign	description	Description	Description	Multiple Lines of	Managed	Enabled
<ul> <li>Campaign Activity</li> <li>Campaign Response</li> </ul>	<	- · · · ·		B · · · · ·		>
<ul> <li>Case</li> <li>Case Resolution</li> </ul>	1 - 50 of 52 (0 selected)					🗏 🖣 Page 1

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

Microsoft Dynamics CR V V Astes V Dashboards V										
SALES		م Service	MARKETING	SETTINGS						
ili → 👘 Setti		$\oplus$	۵							
Extensions     MSCRM-ADDONS	.co	M-ADDONS.CO	, POWERSEAF	CH CONFIG						



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

<b>u</b> ~	♠   SETTINGS - MSCRM-ADDONS.c	<b>~</b>		$\oplus$	CRM System Contoso
+ NEW	V 🛅 DELETE 💌 🗋 COPY A LINK 💌 🕑	RUN REPORT 🔻	EXPORT TO EXCEL		
₩ A	ctive MSCRM-ADDONS.	com Pr	v	Search for records	2
✓ Na	ame 个	Product Type	Created By Created Or	n	T é
Gro	oupCalendar	server	CRM System 10/10/2	013 1:10 AM	
Plu	Jgin	server	CRM System 10/2/2	013 3:09 AM	
Pov	werSearch	server	CRM System 10/2/2	013 3:08 AM	
Tel	lephoneIntegration	server	CRM System 10/3/2	013 3:11 AM	

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

🚈 🗸 🏦   SETTING	S ▼ MSCRM-ADDONS.c   ▼ Grou	upCalenda		CRM System Contoso
Common	\$	Process Sessions	¢*	
	MSCRM-ADDONS.COM SE	BACKGROUND PROCESSES	REAL-TIME PROCESSES	3
General <sub>Name</sub> * G	GroupCalendar			
	erver			

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

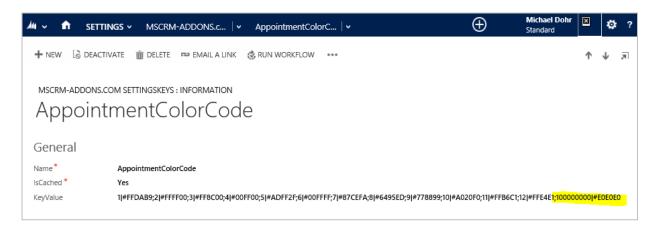
NOTE: The procedure is the same for every color you want to add. Also, it is the same procedure for adding a new color to the color drop-down-menu within the other activity entities instead of the appointment entity (you just have to select the other activity type in step 2 and activity type color code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

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



🚧 🗸 🏦   SETTINGS 🗸 MSG	CRM-ADDONS.c 🛛 🗸 GroupCalendar 🖌	$\oplus$	CRM System Contoso		ø
				$\uparrow$	¥
mscrm-addons.com products GroupCalenda					
MSCRM-ADDONS	S.com Settingsk 👻	Search for record	s		
	, ADD EXISTING MSCRM-A 🕼 BULK DELETE 📲 CHART PANE 👻				
✓ Name ↑	KeyValue	IsCached	Created On		Ŧ
✓ Name ↑ AllowExport	KeyValue true	IsCached Yes	Created On 10/10/2013 1:10 A	M	Ŧ
		Yes			Ŧ
AllowExport	true	Yes	10/10/2013 1:10 AI	М	Ŧ

**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)





**10.** 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)

<i>4</i> 4 - ↓	WORKPLACE - GroupCalendar New	ppointment	$\oplus$	Michael Dohr 🛛 🕅 🐼	?
SAVE 🔹	MARK COMPLETE 🔂 RECURRENCE 🗐 FORM			1 ψ	al.
APPOINTM	ENT : INFORMATION				
New	Appointment				
Appoint	ment				
Subject *	8				
Required					
Optional	-				
Location					
Show Time As		Color	light grey		
Scheduling I	nformation				
Start Time *	10.Okt.13 17:00	Duration	30 minutes		
End Time*	10.Okt.13 17:30	All Day Event			

4	∽ 🖬 work	PLACE - Group	Calendar			$\oplus$	Michael Dohr Kandard	۰
Ź	NEW ACTIVITY 👻	+ NEW RECORD -	import data	ADVANCED FIND				
31	Month View	♡ 7	Week View	♡	Day View	♡ â All		• 6
			Мау	2013			GroupCalendar View	-
	Mon	Tue	Wed	Thu	Fri	Sat/Sun	Saturday, 18 May	2013
	Apr 22	23	24	25	26	27	< May 2013	>
					09:30am SMB05 Value of An 10:30am TEL07i Dynamics CR	U	Mo Tu We Th	
17					10:30am TEDU/i Dynamics O	28		3 4 5
						08:30am WEB04i High Ir 🔨		10 11 12 17 18 19
						08-30am SMR03 Increase		24 25 26
	29	30	May 1	2	3	4		<b>31</b> 1 2
	06:30am SMBVK How We	04:15am WIN13i Window	Meeting with dev-team	06:45am WEBVK Get Inspire	04:02am WEB06 Don't Build	10:30am SMB09 Capture	23 3 4 5 6	789
18	07:15am TEL02 Moving F	05:30am SMB11i Winnin	08:00am WEB05 Improv	07:30am TEL05 Moving Infor	07:30am WP10i Enterprise M	03-00cm WBM02 Dealard	Today	
	08:20am BL01 How to Pr 09:30am WP02 The Five	07:30am DYNVKR Be Dy 10:50am WP06 Windows	08:30am Test 09:00am SC01 High Perf V	11:00am DYN10 Driving Suc 05:00pm BL07 Letting Go to	08:15am TEL08 Microsoft Lyr 10:30am BL12 Making the Mo		Extended Sele	ct:
	01:40pm WINVK Enablin	11:55am BL10R MPN Pro	09:45am SMB03 Selling )	chaoph ocor county or to	Transfer Planty dr. P		Select Users/Resource	25
	6	7	8	9	10	11	🔑 Settings	
							Users:	
19						12	All	
							Which activities should	be shown: "
	13	14	15	16	17	18	New Activ	ity 👳
							Task	$\checkmark$
20							Fax	
						19	C Phone Call	
							Email	
	20	21	22	23	24	25	E Letter	
							Appointment	~
21							Service Activity	$\checkmark$
21						26		
							Options:	
	27	28	29	30	31	Jun 1	Only attendees:	
			01:30pm Meeting with Bauer		08:00am APPOINTMENT XY	5011 1	Only open:	
22					10:00am MEETING		TopDown activities of	only 🗌
22					12:30pm asdf	2		
							Print Preview	
							debug	



## 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.

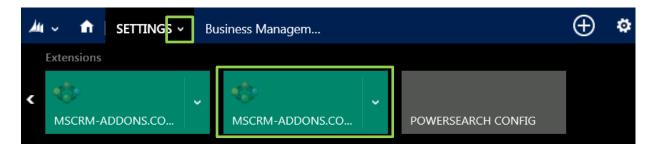
			8/28/2012, 0	8:00		
	Name 🔺	3	08:00	09:00	10:00	11
8	Admin Istrator		asdf Location: Graz Category: Mer Contact: <u>A Co</u> Required: <u>Ado</u>	ating ontact		

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)

Microsoft Dynamics CR <mark>M → Ales → Dashboards   →</mark>					
ů.,	Ŧ	مر <b>د</b>	٦.	\$	
SALES	WORKPLACE	SERVICE	MARKETING	SETTINGS	

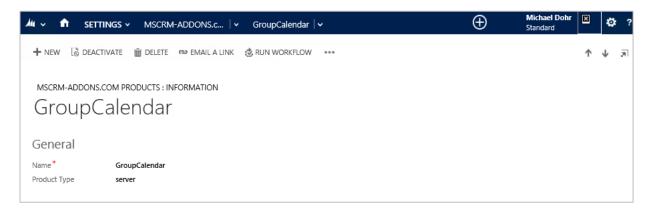
Afterwards, click on "MSCRM-ADDONS.com Products" in the "Extensions"-area of the ribbon and mark the checkbox in front of the GroupCalendar and click on "Edit" within the CRM menu at the top.





4	🗸 🏦 SETTINGS 🗸 MSCRM-ADDONS.c	.   •		$\oplus$
+	NEW 🖌 EDIT 🗸 ACTIVATE 🛛 DEACTIVATE	🗑 DELETE 🛛 👻		
¥	Active MSCRM-ADDONS.	com Pr	Ŷ	Search for records
~	Name 🛧	Product Type	Created By	Created On
~	GroupCalendar	server	CRM System	10/10/2013 1:10 AM
	Plugin	server	CRM System	10/2/2013 3:09 AM
	PowerSearch	server	CRM System	10/2/2013 3:08 AM
	TelephoneIntegration	server	CRM System	10/3/2013 3:11 AM

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



	🚈 🗸 🏫 SETTIN	gs v MSCRM-ADDONS.c │ v Gro	upCalendar 🗸	$\oplus$	Michael Dohr Standard	×	¢	?
	Common		Process Sessions					
		$\diamond$	Č <sub>o</sub>	Č*				
	AUDIT HISTORY	MSCRM-ADDONS.COM SE	BACKGROUND PROCESSES	REAL-TIME PROCESSES				
ļ								
	Grouped							
	General							
	Name*	GroupCalendar						
	Product Type	server						



Following window opens:

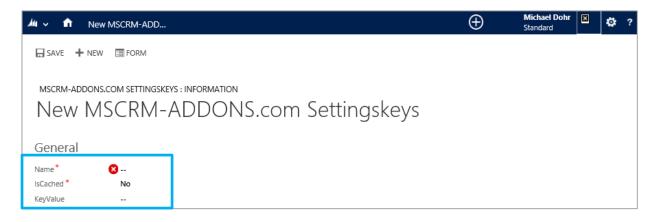
₩ ~	🗙 settings 🗸 🛛	mscrm-addons setti   🗸	$\oplus$	Michael Dohr Standard	×	ø	?
+	NEW 💼 DELETE 👻 🗋	COPY A LINK 🗸 🗭 RUN REPORT 👻 🕼 EXPORT TO EXCEL 🛛 🚥					
¥	Active mscrm-	-addons settings ×				р	
$\checkmark$	ProductName 个	Created On ProductType			Ŧ	C	<
	AlertsBackup	26Jän.10 07:22 server					Charts
	DashboardBackup	22.Okt.09 15:17 server					arts
	DocumentsCorePackBackup	07.Jul.10 09:07 server				1	
	EmailToolsBackup	14.Dez.09 09:15 server					
	GroupCalendarBackup	15.Okt.10 11:54 server					Ľ
	PowerSearchBackup	26.Jän.10 08:31 server				(	

**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)

🚈 🗸 🏫 settings 🗸 Mscrm	I-ADDONS.c │ ♥ GroupCalendar │ ♥		$\oplus$	Michael Dohr Standard	×	۵	1
					↑	$\downarrow$	त्रा
MSCRM-ADDONS.COM PRODUCTS : II	νεορματιον						
GroupCalendar							
MSCRM-ADDONS.c	om Settingsk 🔹	S	earch for records				Q
	D EXISTING MSCRM-A 🖟 BULK DELETE 📲 CHAR	T PANE *					
✓ Name ↑	KeyValue	IsCached	Created On			Ŧ	ŝ
AddGanttAttrappointment1	location	Yes	06.Apr.11 1	6:05			~
AddGanttAttrappointment2	requiredattendees	Yes	31.Mai.13 1	0:29			1
AddGanttAttrappointment3	optionalattendees	Yes	31.Mai.13 1	2:33			
<u> </u>	1	V	05 4 14 4	C.OF			



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.

D NEV	W ACTIVITY 🔻	+ NEW	RECORD 🔻	import data	ADVANCED F	IND					
31	Month View	♡	7	Week View	♡	Day View	/ ♡	La Christian	Ternek	•	Ø
			10/14/2013		10/15/2013		10/16/2013		10/17/2013		<
Ful	ill Name 🔺		12:00 am	12:00 pm	12:00 am	12:00 pm	12:00 am	12:00 pm	12:00 am	12:00 pn	r
🕹 Chr	ristian Ternek										

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.

2	NEW ACTIVITY - +	NEW RECORD *	🛃 IMPORT DATA	ADVANCED	FIND								↑ ↓
31	Month View	3		7 W	eek View ⊗		1	Day View	$\otimes$		& All		•
						Week 40						Week 41	
1	Full Name 🔺	Access Mode	First Name	Last Name	Primary Email	10/1/2013	10/2/2013	10/3/2013	10/4/2013	10/5/2013	10/6/2013	10/7/2013	10/8/2013
<b>ů</b>	Admin Istrator	Read-Write	Admin	Istrator	mscrmaddons@gmail.com								
ů	Chris Preston	Read-Write	Chris	Preston	cpreston@contoso.com								
ů	christian Ternek	Read-Write	christian	Ternek	ctenerk@contoso.com								
•	Jin Yan	Read-Write	Jin	Yan	tpatterson@contoso.com								
<u>.</u>	Max Mustermann	Read-Write	Max	Mustermann	mmustermann@contoso.cc	<							

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 🗸 🗌	MSCRM-ADDONS.c   • Gro	upCalendar   🗸	$\oplus$	Michael Dohr Standard	•	?
Unknown48	1	Extensions				
IMPORTS	DUPLICATE DETECTION	MSCRM-ADDONS SE	MSCRM-ADDONS.CO	MSCRM-ADDONS.CC	)	>
		1	l l		I	
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		Unknown51	1			
<b>,</b> [],		**	+	14		,
DOCUMENT MANAGEMENT		CUSTOMIZATIONS	SOLUTIONS	DYNAMICS MARKET	PLACE	Í



4 🗸 🏫 Settings 🗸	Customizations			$\oplus$	Michael Dohr Standard	•
ustomization						
Which feature would you li	ke to work with?					
entities, fields, relation	ystem tet components in your organization. Compone nships, forms, reports, processes, and others. t, or import a managed or unmanaged solution.	nts include	Publishers Create, modify or delete a solutio Developer Resources View information or download fil extensions for Microsoft Dynamic	es that help you o	levelop applications and	1
File Save and Close		t Translations \mid 🖹 Export Tra	nslations   🚺 Publish All Cu	stomizations	<u>∳A</u> ctions ↓	@ <u>H</u> e
Solution: Default Solution			View Customizable			
Information	Component Type Entity		View Customizable			~
	✓ Display Name ↑	Name	Schema Name	State	Customizable	Aud
Option Sets	Signatures	new_signatures	new_signatures	Unmanaged	True	Disabl
Client Extensions	La Site	site	Site	Managed	True	Disab
Processes	Solution	solution	Solution	Managed	True	Disab
• Plug-in Assemblies	Subject	subject	Subject	Managed	True	Disabl
Service Endpoints	System Chart	savedqueryvisualization	- SavedQueryVisualization	Managed	True	Disabl
Reports	Task	task	Task	Managed	True	Disab
Sconnection Roles	a <sup>8</sup> a Team	team	Team	Managed	True	Disab
Contract Templates	Team template	teamtemplate	TeamTemplate	Managed	True	Disab
Email Templates Mail Merge Templates	Territory	territory	Territory	Managed	True	Disab
Security Roles	Unit	uom	UoM	Managed	True	Disabl
Field Security Profiles	Gint Group	uomschedule	UoMSchedule	-		Disabl
	Subser			Managed Managed	True	Disabl
		systemuser	SystemUser	-	True	
	User Chart	userqueryvisualization savedquery	UserQueryVisualization SavedQuery	Managed Managed	True	Disabl Disabl
						)



8 User						
💳 📄 Views						
ution Default Solution	View: All Active Views					
P 📑 Keport						
Report Related Cat ^ Resource	New X More Actions 🗸					
Resource Expansion	Name 🛧	Туре	State	Customizable	Description	
Resource Group	@Me	Public View	Managed	False	@Me	
Rollup Field	eme	Fublic Felt	managea	10150	eme	
Rollup Query	Activity Sender Users Lookup View	Lookup View	Managed	True		
Sales Literature	Administrative Access Users	Public View	Managed	True		
Image: Saved View	Administrative Access Osers	Public view	Manageu	nue		
Scheduling Group	All Salespersons	Associated View	Managed	True	List of all salespeople in the or	rganizati
Security Role	Associated Record Team Members	Public View	Managed	True		
Service	Associated Record Team Members	Public view	Managed	True		
Service Activity	By Me	Public View	Managed	False	By Me	
SharePoint Site				_		
Signatures	Disabled Users	Public View	Managed	True		
D 📕 Site	Disabled users consuming licenses	Public View	Managed	True		
Solution						
Subject	E-mail	Public View	Unmanaged	True	E-mail	
System Chart	Enabled Users	Default Public View	Managed	True		
Task			2			
▷ <u>a<sup>0</sup>a</u> Team	Full Access Users	Public View	Managed	True		
<ul> <li>Team template</li> <li>Territory</li> </ul>	Local Business Users	Public View	Managed	True		
Image: Second	Eddar Dosiniess Osers	Fublic Flett	managea	1100		
Image: Second	My Connections	Public View	Managed	True	Shows all active instances of the	he user t
4 🕹 User	My Direct Reports	Public View	Managed	True		
E Forms	My Direct Reports	Fublic view	Manageu	nue		
💮 Views	Quick Find All Users	Quick Find View	Managed	True		
Charts	Read-Only Access Users	Public View	Managed	True		
Fields	Read-Only Access Osers	Public view	Managed	Inde		
ன 1:N Relationships	Salespeople Lookup View	Lookup View	Managed	True		
N:1 Relationships		A		-		
💦 N:N Relationshi	Salesperson Associated View - By Ter	Associated View	Managed	True		
Messages 1	Subsidiary Users	Public View	Managed	True		
Business Rules		5 J F 3 F		-		
User Chart	<					>
View	1 - 32 of 32 (0 selected)				lif. al.	Page 1

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]

Attp://crm2013srv	1:5555/?appSolut	ionId=%7bFD140AAF-4DF4-11DD-BD17-0019B93	122 🗕 🗖 🗙
File	🛃 Save and Close		@ <u>H</u> elp →
View: New Vie	Provide Informatio	View Properties Webpage Dialog	lution: Default Solution
	the View list.	cription for this view. For public views the name will be visible to users in	$\leftarrow \rightarrow$
	Name * Description	GroupCalendar Gantt View X	View Properties Edit Filter Criteria Configure Sorting Add Columns
			Change Properties Remove
1 Note: When there are to		OK Cancel	
	http://cr 🗸 Trusted	sites   Protected Mode: Off	

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

View: GroupCalendar Gantt View	Working on solution: Default				
Ill Name 🔺	Common Tasks ← → □ View Properties ○ Edit Filter Criteria □ Configure Sorting □ Change Properties				



Reco	rd Type	User		~	
	Display Name 🔺		Name	Туре	
	Access Mode		accessmode	Option Set	
	Address		address1_composite	Multiple Lines of Text	
	Address 1: County		address1_county	Single Line of Text	
	Address 1: Fax		address1_fax	Single Line of Text	
	Address 1: Latitude		address1_latitude	Floating Point Number	
	Address 1: Longitude		address1_longitude	Floating Point Number	
	Address 1: Name		address1_name	Single Line of Text	
	Address 1: Post Office	Box	address1_postofficebox	Single Line of Text	

0	re Sort Order is to sort on by default.	×
Sort By	Full Name	~
	Ascending Order     Descending Order	
Then By	Select Ascending Order Descending Order	~
	ОК	Cancel

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 KeyValue 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

<u>/</u>	<b>त ∣ SALES ~</b> Dash	boards   🗸		$\oplus$	\$
<b>«</b>	MARKETING	SETTINGS	<b>?</b> HELP		

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

4	(v <b>f</b> r	SETTINGS ~	Bu	isiness Managem			$\oplus$	¢
	Extensions						_	
<	MSCRM-A	.DDONS.CO	~	MSCRM-ADDONS.CO	~	POWERSEARCH CONFIG		

This action will open following window.

4	4 ~	♠ SETTINGS    MSCRM-ADDONS.c	.  ~			$\oplus$	×	₽	?
	+ 1	NEW 🖋 EDIT 🗸 ACTIVATE 🗋 DEACTIVATE	💼 delete 👻	•••					
	¥	Active MSCRM-ADDONS.	com Pr	~	Search for records			Q	
	$\checkmark$	Name 🛧	Product Type	Created By	Created On		Ŧ	e	<
		ActivityTools	server	Admin Istrator	12.Mär.13 15:10				S
		AttachmentExtractor	server	Admin Istrator	05.Feb.13 14:07				Charts
		AutoMerge	server	Admin Istrator	13.Nov.12 16:10				11.)
		DocumentsCorePack	server	crmadmin _	15.Okt.12 15:35				0
	~	GroupCalendar	server	Admin Istrator	18.Mär.11 13:16				
		Plugin	server	Admin Istrator	15.Mär.11 13:07				a
		PowerSearch	server	Admin Istrator	15.Mär.11 13:07				(S
		RecordCounter	server	Admin Istrator	18.Jän.12 12:08				
		TelephoneIntegration	server	crmadmin _	22.0kt.12 10:20				

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.

🚈 🗸 👘   settings ∽	MSCRM-ADDONS.c	pCalendar 🗸
Common		Process Sessions
	MSCRM-ADDONS.COM SE	BACKGROUND PROCESSES R



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

🏄 → 📫   SETTINGS →	MSCRM-ADDONS.c		$\oplus$	×	ø	?
				^ ↓	1	al.
mscrm-addons.com prot GroupCaler						
MSCRM-ADDO	NS.com Settingsk					Q
+ ADD NEW MSCRM-ADDO	🛱 ADD EXISTING MSCRM-A 🗍 BULK DELETE					
✓ Name ↑	KeyValue	IsC	ached Cr	eated ¶	T	С
AddGanttAttrappointment1	location	Yes		06.Ap	or.11	^

C nttp://crm2013srv1:55	55/?etc=10013&extraqs=%3f_CreateFromId%3d%257b3F8F9080-5951-E01	1-ACTC-0015.		_	^
🚈 🧹 🦍 🕴 New M	ISCRM-ADD	$\oplus$	×	¢	?
SAVE + NEW	E FORM				
Name *	GanttUserTemplateId				
IsCached *	Yes				
KeyValue	E29A0AC2-2837-E311-93F5-00155DC80C07				
Status	Active				_
Active				i	8

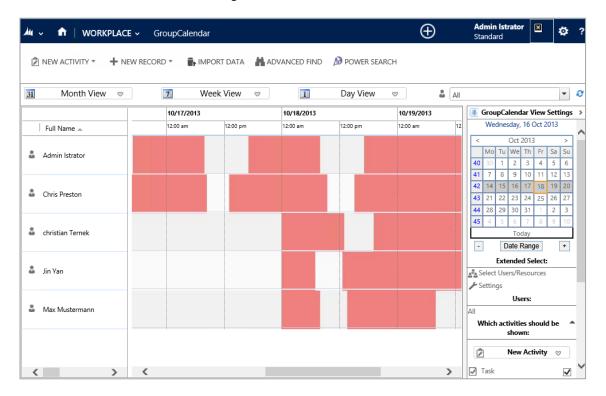


## 10.4 Show Working Hours and Time-Off

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.

<b>/</b> / ~	↑ WORKPLACE ~ GroupC	alendar	$\oplus$	Admin Istrator 🗵 🔅 🕇
휟 NEW	ACTIVITY - + NEW RECORD -	IMPORT DATA ADVANCED FIND	₯ POWER SEARCH	
31	Month View 🗢 🚺	Week View 👳	Day View 👒	
we	ednesday, october 16, 2013			GroupCalendar View Settings
all day	Admin Istrator	Chris Preston	christian Ter	< Oct 2013 >
07:00 <sup>am</sup>				Mo         Tu         We         Th         Fr         Sa         Su           40         30         1         2         3         4         5         6           41         7         8         9         10         11         12         13           42         14         15         16         17         18         19         20
08:00 <sup>am</sup>				42         14         15         16         17         18         19         20           43         21         22         23         24         25         26         27           44         28         29         30         31         1         2         3           45         4         5         6         7         8         9         10
9:00 <sup>am</sup>				Today Extended Select:
10:00 <sup>am</sup>				Select Users/Resources
11:00 <sup>am</sup>				Users:
12:00 <sup>pm</sup>				Which activities should be shown:
12.00	<		>	✓ New Activity ♥ ✓ Task
\$ Show 24	4 hours			Fax

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



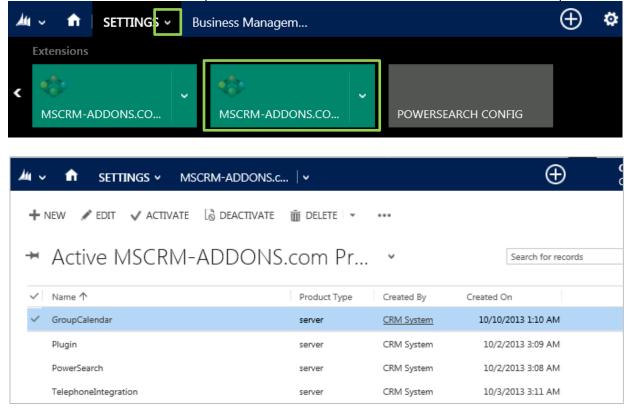


Per default, this feature is not enabled because it has a slight performance impact on loading the views. To enable this functionality, please follow the steps below.

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

Microsoft Dynamics CR	1 🗸 🏫   SALES 🗸 🛛 Dashb	oards   •		
°.~	ŧ	مر <sup>2</sup>	بّ	\$
SALES	WORKPLACE	SERVICE	MARKETING	SETTINGS

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)

¼ 🗸 🏫 Settings 🗸 🕅	MSCRM-ADDONS.c   🗸 Gro	oupCalendar   🗸	$\oplus$	Michael Dohr Standard	×	۵	?
🕂 NEW [ 👌 DEACTIVATE  前 I	DELETE 🖚 EMAIL A LINK 🗔 RUI	N WORKFLOW ***			↑	Ψ	я
mscrm-addons.com produ GroupCalence							
General	landar						
Product Type server	endar						
🌆 🗸 🍙 Settings 🤟 M	MSCRM-ADDONS.c   🖌 Gro	upCalenda 🗸 🗸	$\oplus$	Michael Dohr Standard	×	۵	?
Common		Process Sessions					
	÷	Ċ	Ċ.				
AUDIT HISTORY	MSCRM-ADDONS.COM SE	BACKGROUND PROCESSES	REAL-TIME PROCESSES				

AUDIT HISTORY	WISCHWI-ADDONS.COM	DACKGROOND FRO	LAC-TIME PROCESSES	
Glouped	nendal			
General				
Name*	GroupCalendar			
Product Type	server			

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)

<b>4 ∽ की settings ∽</b> MSCRN	I-ADDONS.c 🛛 🗸 GroupCalendar 🖌		$\oplus$	Michael Dohr Standard	×	۵	
					↑	$\downarrow$	ž
MSCRM-ADDONS.COM PRODUCTS : IN							
GroupCalendar							
MSCRM-ADDONS.c	om Settinask ×	S	earch for records				
	DEXISTING MSCRM-A 🔀 BULK DELETE 📲 CHA	ART PANE *					
✓ Name ↑	KeyValue	IsCached	Created On			Ŧ	1
AddGanttAttrappointment1	location	Yes	06.Apr.11	16:05			,
AddGanttAttrappointment2	requiredattendees	Yes	31.Mai.13	10:29			
AddGanttAttrappointment3	optionalattendees	Yes	31.Mai.13	12:33			

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

Installation Guide



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

🌆 🗸 🔒 🗎 New M	SCRM-ADD	$\oplus$	×	۵	?
🖬 SAVE 🕂 NEW [	3 FORM				
	m settingskeys : information CRM-ADDONS.com Settingskeys				
General					
Name *	EnableWorkingHours				
IsCached *	Yes				
KeyValue	<u>true</u> .				

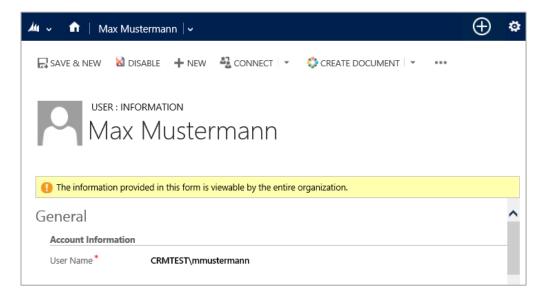
After you have typed in the values, click on "Save and Close" in the CRM menu at the top. To apply the changes, you have to run an IISRESET on the CRM server. Optionally, you can restart the GroupCalenderServer Application Pool within IIS on the CRM server.

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

	. ✓ GroupCa	alendar				$\oplus$	Admin Istrator Standard	×	۵	?
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	10/14/2013		10/15/2013		10/16/2013		🚇 GroupCalendar	View Se	ettings	; >
Full Name 🔺	12:00 am	12:00 pm	12:00 am	12:00 pm	12:00 am	12:00 pm	Wednesday, 16	Oct 20	13	
							< Oct 20	13	>	
Admin Istrator							Mo Tu We Tr		Sa Su	1
							40 30 1 2 3		56	
									2 13	
Chris Preston							42         14         15         16         17           43         21         22         23         24		19 20 26 27	
							44 28 29 30 3 <sup>-</sup>		2 3	1
							<b>45</b> 4 5 6 7	+	9 10	
🍰 christian Ternek							Today	,		
							- Date Rar	nge	+	
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🍰 Jin Yan							Select Users/Reso	urces		-
							🔎 Settings			
							Users	:		
🚨 Max Mustermann							All			
							Which activities shown:		be 4	•
							silowii.			-
							Dew Ac	tivity	$\heartsuit$	
< >	<					>	🛃 Task		~	~



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.

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Г		1		Service	
<		4 <u>7</u>		برہ	>
	WORK HOURS	CONNECTIONS	AUDIT HISTORY	SERVI	c



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":

~ <b>f</b>   M	Max Musterma	nn  ~				Θ	Э
US	ER : INFORMAT	ION					
		ustern	hann				
		ustern	IGHT				
) The informa	tion provided in	this form is view	able by the er	ntire organization.			
Monthly View							
Set Up 👻	X   More Acti	ons *					
	eekly Schedule		_				
	chedule for One D	ay	be	r 2013 🕨			
🔗 Time Of			.wo	ch Donnerstag	g Freitag	Samstag	ø
29	30	1	2	3	4	5	
資 All Day	資 All Day	劗 All Day	資 All Day	🏹 All Day	🏹 All Day	資 All Day	î
6	7	8	9	10	11	12	-
🄰 All Day	🄰 All Day	🔰 All Day	🔰 All Day		🔰 All Day	🔰 All Day	
13	14	15	16	17	18	19	
資 All Day	資 All Day	資 All Day	資 All Day	資 All Day	資 All Day	資 All Day	~
3MT+01:00) Am	sterdam, Berlin, B	ern, Rome, Stockh	olm, Vienna				



Following window appears:

Mttp://crm2013srv1:5555/?calendarId=&id=%7bA00A04D4-F437-E3	. <b>- 0 X</b>
🛃 🛛 🙀 Save and Close	<u> </u>
Weekly Schedule	
Set the recurring weekly schedule	
Work Hours	
Vary by day	
O None. Resource is not working	
Work Days 🗹 So 🗹 Mo 🗹 Di 🗹 Mi	
🗹 Do 🗹 Fr 🗹 Sa	
Business Closures 🔘 Observe	
<ul> <li>Do not observe</li> </ul>	
Date Range	
Starting On 18.Okt.13 III 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:

		Work Day Webpage Dialog	
		and Service Restrictions cheduled for services and any service restrictions that apply.	
Work Hours	Service Restrictions		
Enter work hou	rs and breaks	Show Capa	city >>
Туре	Start	End	
Work Hours	D8:00         ×           00:00         00:30           01:00         01:30           02:00         02:30	Add Break	
Help	Vorking: 9 hours, Break		Cancel

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:

🏄 🗸 🏫   WORKPLACE 🗸 GroupCalendar					$\oplus$	Admin Istrator Standard	×	₽	?	
Dew activity ▼ + New Record ▼		🛃 IMPORT DATA 🛛 🛔 ADVANCED FIND		₯ POWER SEARCH						
31	Month View	♡ 7	Week View	♡	Day View 🛛 🗢	all all			•	e



After that you can see the set working hours:

	GroupCalendar				$\oplus$	Admin Istrator Standard	×	۵	?
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31 Month View ♡	7 Weel	<ul> <li>✓ View ♥</li> </ul>	1	Day View	♥ ▲ AI			•	Э
	10/17/2013		10/18/2013		10/19/2013	🔲 🕘 GroupCalendar	View S	ettings	; >
Full Name 🔺	12:00 am	12:00 pm	12:00 am	12:00 pm	12:00 am 1				~
						< Oct 20		>	
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						40 50 1 2 3		2 13	
						42 14 15 16 1		9 20	
Chris Preston						<b>43</b> 21 22 23 2	4 25 2	26 27	1
						44 28 29 30 3	1 1	2 3	1
						<b>45</b> 4 5 6 7	8	9 10	
🍰 christian Ternek						Toda			1
						- Date Ra	nge	+	
						Extended Select:			_
🎍 Jin Yan						Select Users/Res	ources		
						🔎 Settings			
Max Mustermann						User	5:		-
Wax Wustermann						All Which activities should be			
						Which activities should be shown:			-
						🖄 New Activity 👳			
< >	<				>	Task		~	~

## 11 Contact

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

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