c360 Record Editor Installation Guide

Microsoft Dynamics CRM 2011 compatible

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Table of Contents _____

Overview and Notes _____

Overview

This document outlines the process for installing c360 Record Editor for Microsoft Dynamics CRM 2011.

Microsoft CRM Compatibility

c360 Record Editor for Microsoft Dynamics CRM 2011 is compatible with Microsoft Dynamics CRM 2011. For additional product information, please visit http://www.c360.com/RecordEditor.aspx.

Please note that if this installation is on an environment in which c360 Record Editor v3 was installed, you must uninstall the product before continuing with this installation. Please contact support@c360.com for more information.

c360 Record Editor for Microsoft Dynamics CRM 2011

c360 Record Editor is a **Microsoft CRM enhancement** that provides Microsoft CRM users an easy way to edit/modify multiple CRM records within a single screen.

Record Editor is an easy to use inline grid editor that allows you to pick any Advanced Find view to edit in a grid format. All CRM data types including nvarchar, picklist, bit/boolean, int, float, lookup, owner types are supported. In addition, Record Editor can be launched from all of the CRM entity grids as well as Advanced Find view results grid.

The key benefits of Record Editor are:

Edit all CRM fields right within the grid in their own control boxes (date, memo fields, currency, picklist, lookup, boolean, int, money)
Grid enforces CRM's security model (read-only, state attributes, write privileges)
Select all or just specific records to edit
Bulk update to copy a change made to all or select rows in the grid
Launch Record Editor from any CRM grid and/or Advanced Find View Results

Record Editor gives CRM users an easy way to edit multiple records in a single screen.

Installation Instructions _____

Requirements

To install the product the installation application must be run on the CRM server by a user with Local Administrator and CRM Deployment Manager privileges. The user must also be a member of the CRM System Administrator role. The installation of c360 Record Editor for Microsoft CRM 2011 requires the c360 Record Editor for Microsoft CRM crm2011.exe file which can be downloaded by visiting http://www.c360.com/DownloadRegister.aspx.

**Steps to install c360 Record Editor for Microsoft Dynamics CRM 2011**

1. Extract the c360 Record Editor crm2011.zip file into a folder on the Microsoft CRM server machine.

2. Double click the 'c360 Record Editor for Microsoft CRM 2011.exe' file. You will see the following screens.
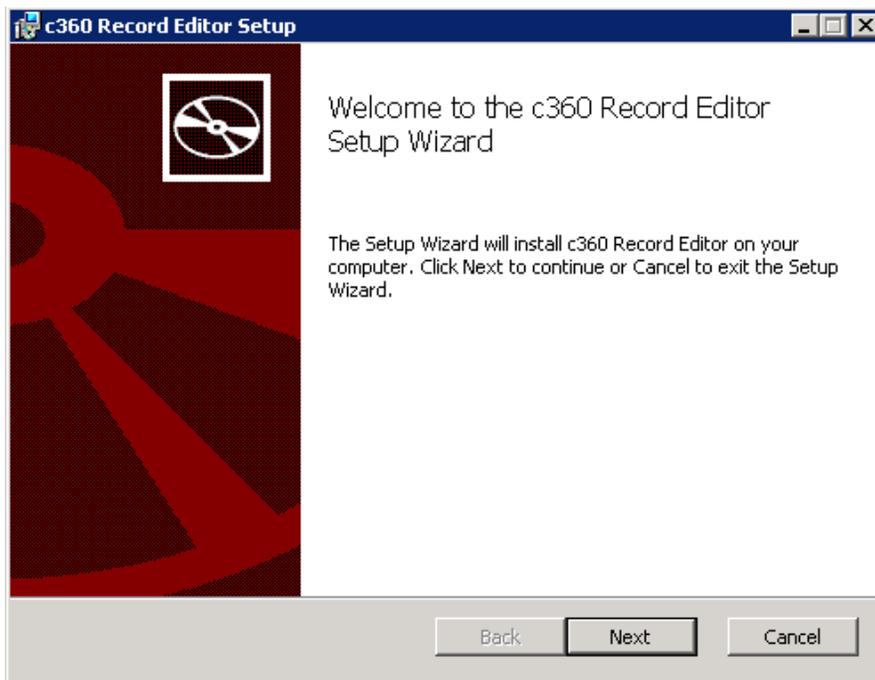
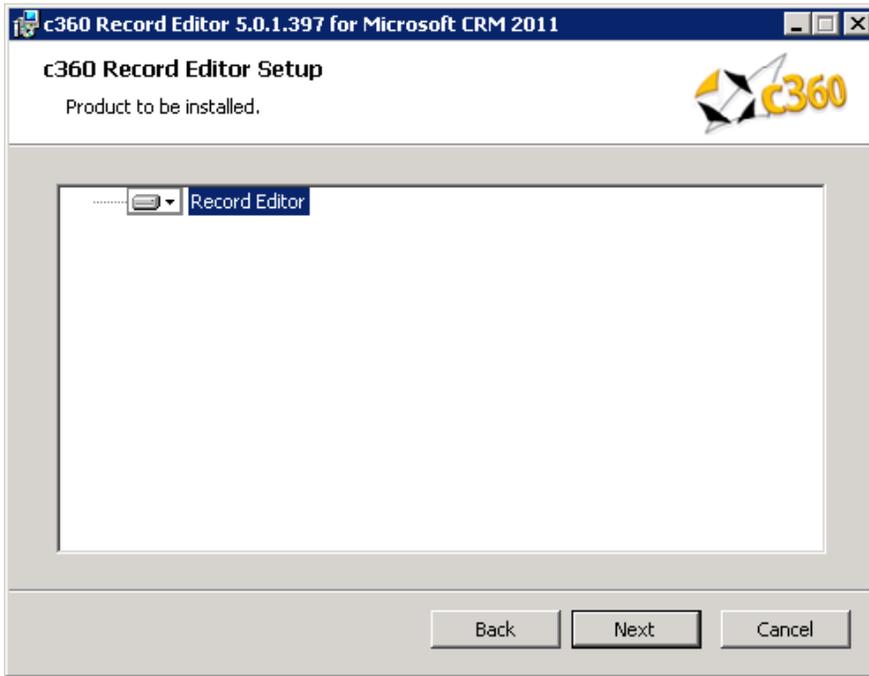3. Click **'Next'** to begin the installation process.
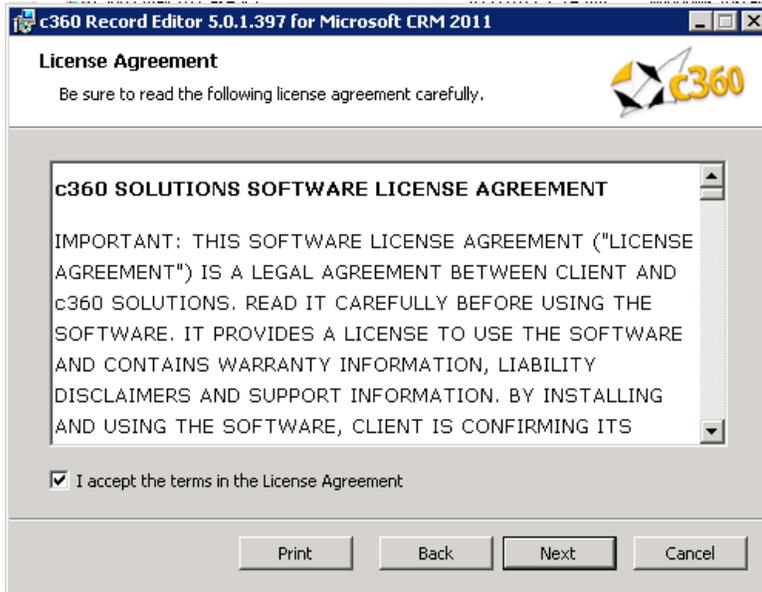
4. If you agree with the terms of the license agreement, select the option labeled 'I accept the terms in the license agreement' and click **'Next'**.
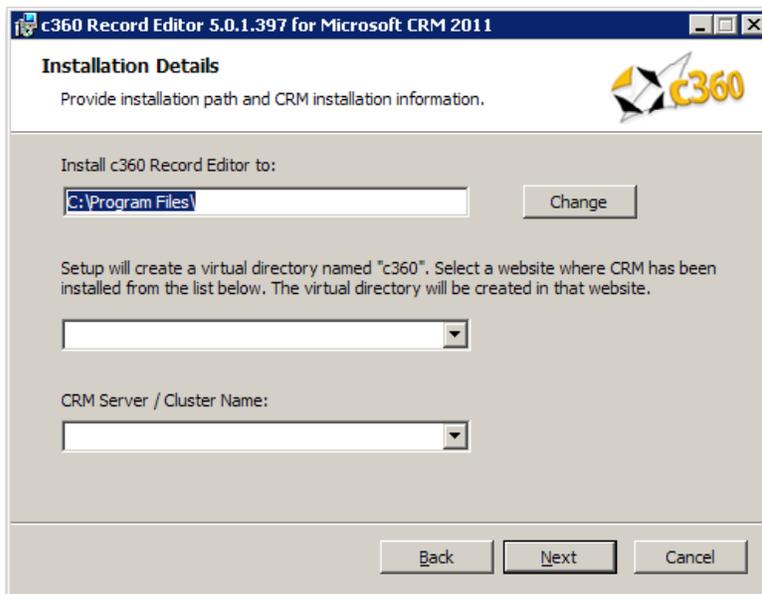
5. Accept the default entry for the installation path or modify. Select the CRM website and verify that the CRM Server / Cluster is correct. Click **'Next'**.

Notes:
CRM Server / Cluster Name: Name/ host header/ IP address of the server that is hosting the Microsoft CRM website.
If any c360 products have previously been installed, this screen will not appear. All configuration settings from the previous install(s) will be used.
If this is an IFD environment, post-installation ensure that the 'Enable Anonymous Access' setting for the c360 Virtual Directory is disabled.

c360 Record Editor 5.0.1.397 for Microsoft CRM 2011

c360 Record Editor Setup
Product to be installed.

Record Editor

Back   Next   Cancel

6. Click **'Next'**.

c360 Record Editor 5.0.2.119 for Microsoft CRM 2011

c360 Record Editor Setup
Discovery Service URL

Enter Discovery Service URL

http://na360crm5/XRMServices

User Name:

Password:

Retype Password:

Domain:

Back   Next   Cancel
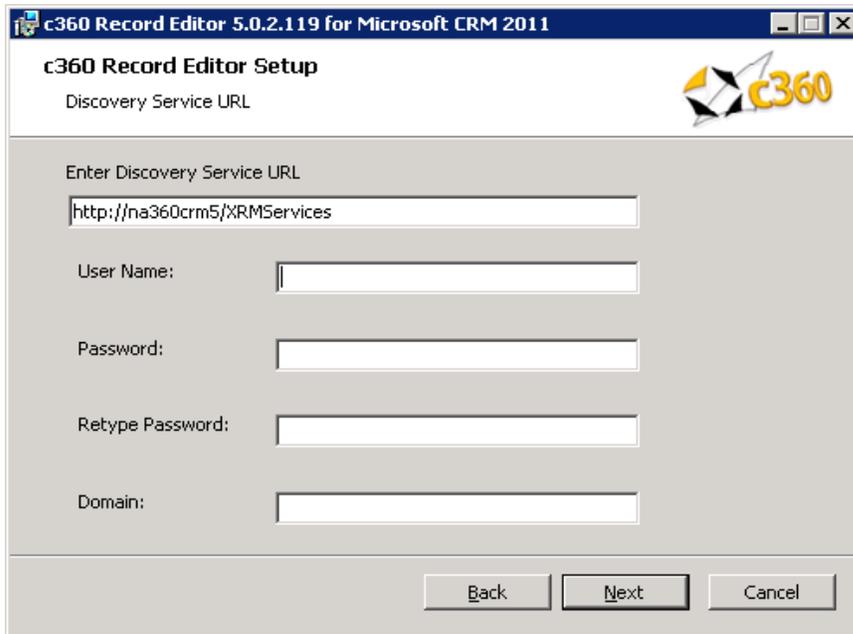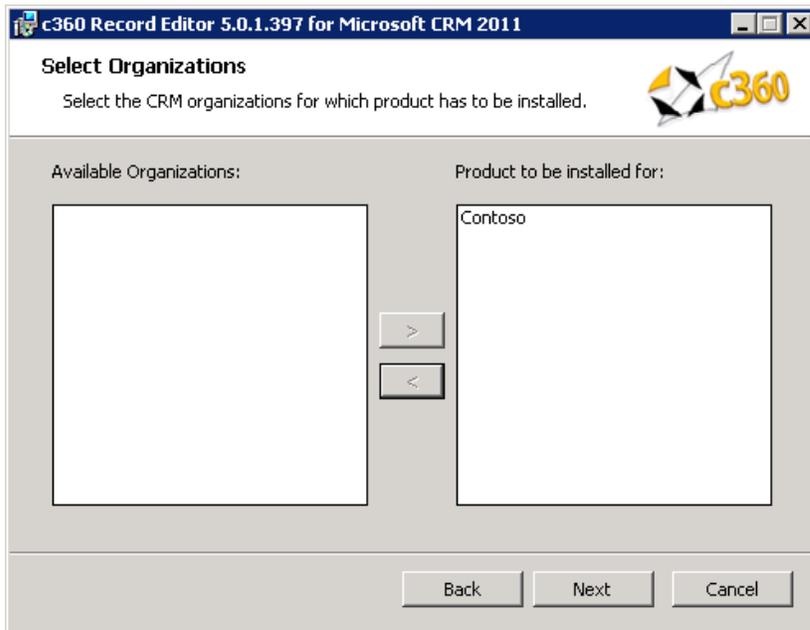
Accept the default entry for the MSCRM Discovery Service URL or modify. Enter the credentials and Click 'Next'. These credentials will be used to execute the discovery service methods.

For an IFD Enabled system, fully qualified domain name which has been used for configuring IFD in CRM needs to be entered in Discovery Service URL.

7. Select the Organization(s) for which the product is to be installed. Then click **'Next'**.

8. Select one Organization for which the product is to be configured (In this case, 'Adventure Works Cycle'). Then click **'Configure'**.

Note:
To be configured: The organization has not been configured for installation.
Successful: The organization has been configured and configuration settings have been validated. The product is ready to be installed for the organization.
Error: There has been an error in validating the configuration settings for the organization. Settings need to be reviewed for accuracy and corrected. (There will be an error on the configuration screen deemed to have invalid entries)

Configured: The Product has been configured and installed for this organization. It cannot be reconfigured but only uninstalled.

9. Enter SPLA credentials for IFD mode. If c360 Record Editor ever needs to operate in IFD mode, these credentials will be used to connect to the CRM discovery service. Click '**Next'**.

10. Select options to be performed during installation. Click **'Next'.**
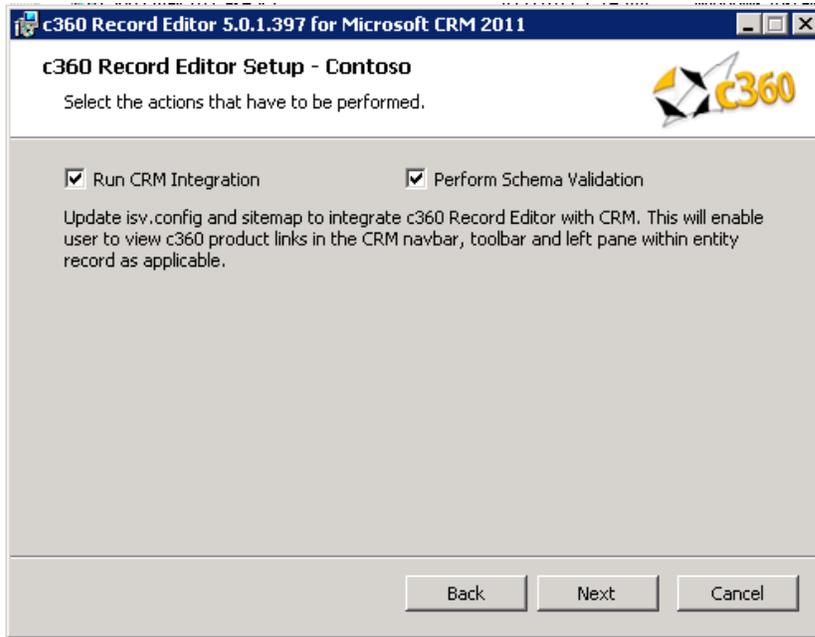
11. Select options to be performed during installation for the selected organization. Click **"Next".**

Note: If installing on a load-balanced environment, please see 'Additional Configurations'.
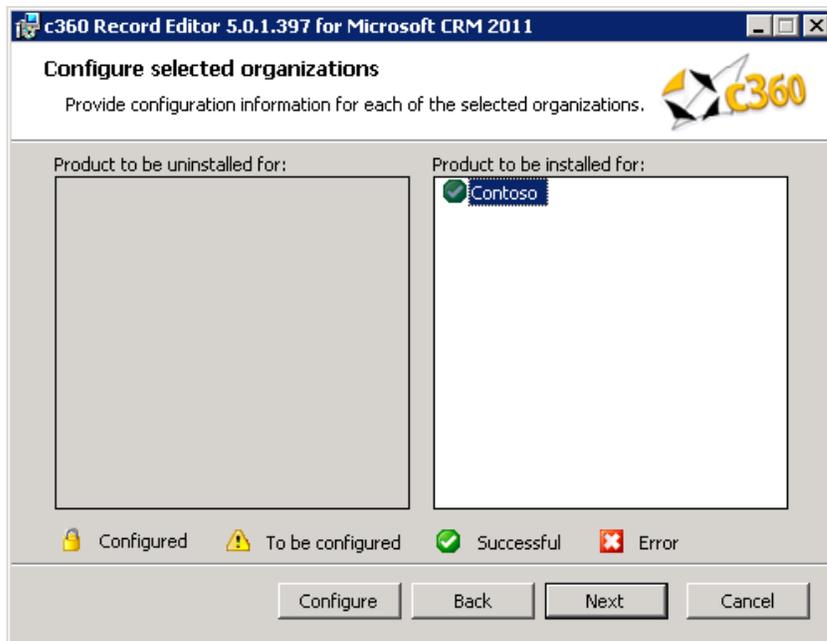
12. Repeat steps 8 – 12 until all organizations have been successfully configured. Then click **'Next'**.
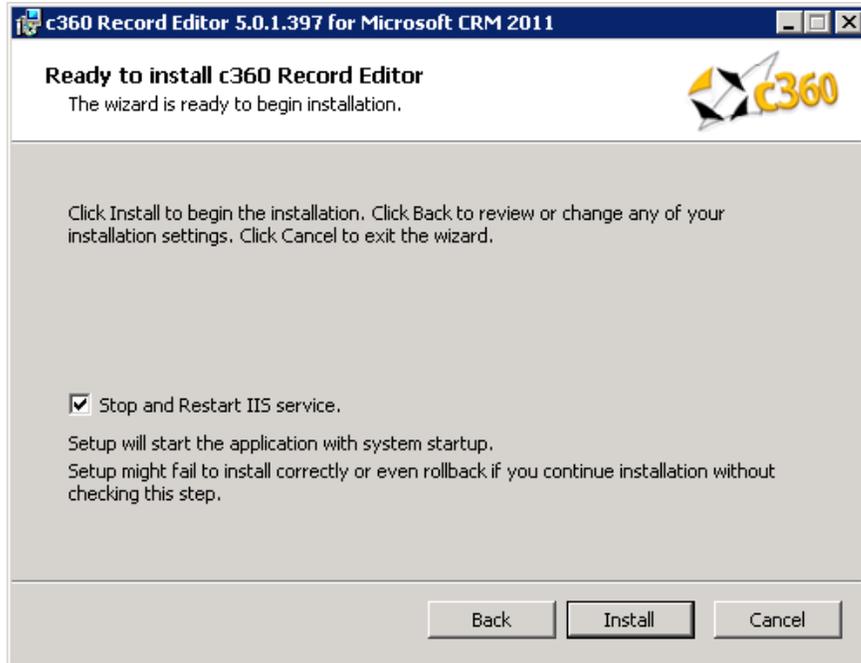
13. Click **'Install'** to install c360 Record Editor for Microsoft CRM 2011.
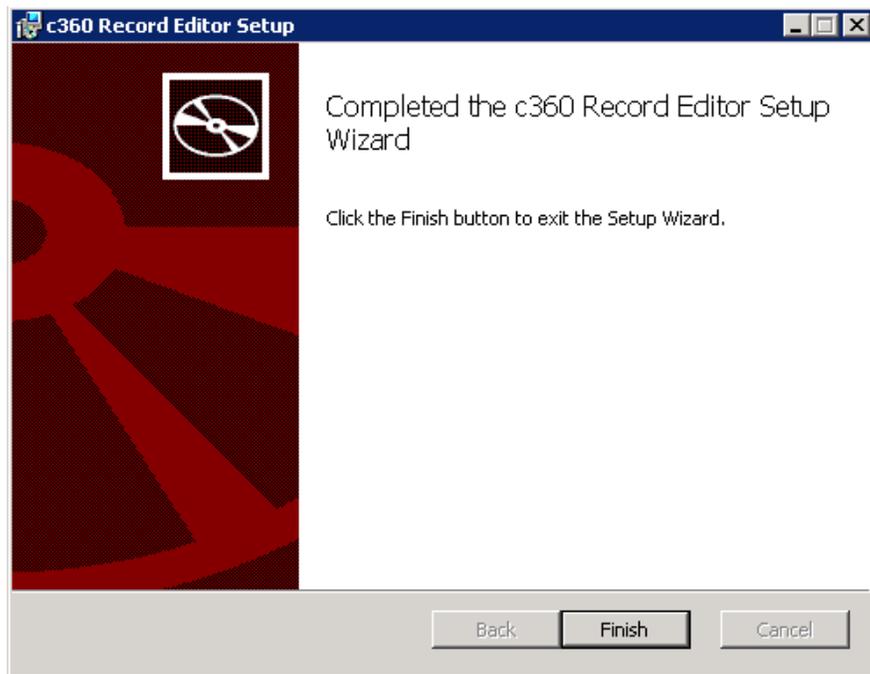
14. Click **'Finish'** to exit the installation wizard.

Product : c360 Record Editor

AdventureWorksCycle

Name	Status	Message
CreateFolders	Successful	Successfully created Folders
OrganizationSpecificFiles	Successful	
UsersRoleMapping	Successful	
Map Users to c360 Metadata Role	Successful	The c360 Metadata Reader was created successfully
Update c360 Config	Successful	
Update Config Files	Successful	Successfully updated the config file.
Crm Integration	Successful	Successfully performed the Crm integration.
EnableISVIntegration	Successful	Successfully enabled the ISV integration

Contoso

Name	Status	Message
CreateFolders	Successful	Successfully created Folders
OrganizationSpecificFiles	Successful	

Done   My Computer

15. A summary of the installation will appear.

Additional Configurations _____

Web Services URL

If the Microsoft CRM web site is running with 'non-default' configuration, it will be necessary to add a key to a c360 Configuration file. Examples of non-default installations are:

CRM website using a non default port number.
CRM website is configured to use a hostname.
CRM secured access is enabled (https connection required).

If any of these conditions is true, c360 Record Editor will be unable to contact your CRM system because it attempts to connect using the following default connection string: http://machinename/MSCRMServices. To remedy this situation do the following:

Open the c360.Config file located in \v5\Organizations\[OrganizationName]\ Config folder in the default directory (C:\Program Files\c360 Solutions) or in the directory selected by you during installation

<add key='WebServicesUrl'
value='**http://myservername:8000**/MSCRMServices'/>

Replace 'myservername' with the actual name of your CRM server or the hostname if your site is configured to use hostname.

Replace '8000' with the TCP port number your CRM website is using.

Replace 'http' with 'https' if you have enabled 'CRM secured access'.

Load-Balanced Environments

To support a load-balanced environment, the installer must be run on all load-balancing nodes.
When installing on every node after the first, the check-box for running CRM Integrations should be un-selected.
It is recommended that the user preferences, license and config folders be synced across nodes.

Administrator Impersonation

In order to override the standard permission check performed by Record Editor, take the following action:

Modify the "AdministratorRole" key in the c360.config file, the value of which can take either the form of a GUID or a role name.

If the role name contains special characters, the role name must be encoded before adding it to this key.

A user belonging to the specified role or GUID will be considered as an administrator when attempting to access secure areas in Console.

*Note that this will not override the CRM security model.

Troubleshooting

Search the c360 Knowledge Base for any errors you receive during or after installation. www.c360.com/support.

Licensing _____

Upgrading c360 Record Editor

It is not possible to migrate from Record Editor v3.0 to Record Editor for CRM 2011. Your system must have Record Editor v4.0 or higher in order to upgrade to c360 Record Editor for CRM 2011.

If c360 Record Editor for CRM 4.0 is already installed with valid licenses, those licenses will be valid for Alerts for CRM 2011. If you no longer have a valid license, or if this is a fresh installation of c360 Record Editor for CRM 2011, license setup application can be obtained from c360 Solutions Inc upon request. This application is an executable file designed to be run on the CRM server.

Copy the License setup application to the CRM server and double click it to run the application. It will automatically place the license file in the appropriate directory.

Evaluation Licenses

To request a 15 day production evaluation license go to our web site at http://www.c360.com/Evaluation.aspx. You will be emailed a licensing application that, when run, will place a valid license file in the appropriate directory.

Demo Licenses

To download "demo licenses" for one of the sample Microsoft Dynamics CRM 2011 installations for organization names 'Adventure Works Cycle Demo', 'Adventure Works Cycle', 'Contoso' or 'Microsoft CRM', please visit our website at http://www.c360.com/Licenses.aspx

Installing additional organizations _____

Steps to install additional organizations for c360 Record Editor for Microsoft Dynamics CRM 2011

Re-run the c360 Record Editor for Microsoft CRM 2011.exe. Follow the process as described in Installation Instructions.

On step 13, select the addition organization(s) to be installed.

Continue the process as described in the rest of the Installation Instructions.

Uninstall Instructions _____

Steps to uninstall c360 Alerts for Microsoft Dynamics CRM 2011

To uninstall all pieces of c360 Record Editor, you must be a local Administrator on the server as well as a member of the System Administrator security role in CRM. This user must be the same user that installed c360 Record Editor.

Option 1: From Add/Remove Programs

1. On the CRM server where you installed the product navigate to 'Control Panel' and open 'Add or Remove Programs'
2. Select c360 Record Editor from the list of the currently installed programs
3. Click 'Remove'
4. Click **'Yes'** in the confirmation message box to begin the uninstall process.
5. Note this will uninstall for all organizations.

Option 2: From the c360 Record Editor .exe

1. On the server, double click the c360 Record Editor installer
2. On the 'Change, repair, or remove installation' screen, click **'Remove'**
3. On the next screen, click **'Remove'** and the executable will uninstall c360 Record Editor

Uninstall an Individual Organization

1. Re-run the 'c360 Record Editor for Microsoft CRM 2011.exe' file.
2. Select the modify option.
3. De-select any configured organizations. Click **'Next'**.
4. Click **'Yes'** in the confirmation message box to begin the uninstall process.

Note: multiple organizations can be uninstalled at once.

International Languages _____

c360 Record Editor for Microsoft Dynamics CRM 2011 includes language translation files which allows you to select the language displayed to the user (German, French etc).

Please go to our language product page http://www.c360.com/Language.aspx to obtain instructions for installing and configuring the language translation.