



c360 Relationship Explorer/Charting Installation Guide

Microsoft Dynamics CRM 2011 compatible

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Overview and Notes

Overview

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

Microsoft CRM Compatibility

c360 Relationship Explorer for Microsoft Dynamics CRM 2011 is compatible with Microsoft Dynamics CRM 2011. For additional product information, please visit <http://www.c360.com/relationshipexplorer.aspx>.

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

c360 Relationship Explorer for Microsoft Dynamics CRM 2011

c360 Solutions Relationship Explorer is a Microsoft CRM enhancement that improves and extends the relationship display and linking capabilities of Microsoft CRM. The **Relationship Tree** component uses an intuitive tree-based structure to display all CRM parent/child relationships that exist between entities within Microsoft CRM. In addition, Relationship Tree reflects CRM Relationships and Connections that provides organizations the ability to allow CRM users to establish less formal relationships between records. Relationship Tree allows Microsoft CRM users to:

- From any CRM record, see all relationships (Standard relationships and Connections) that exists between CRM entities (including custom entities) in an intuitive hierarchical tree-based structure
- See a complete view of any CRM record's relationship hierarchy in a single place
- Set user preferences to determine how the relationship tree should display including which entities to include/exclude, which entities to display in detail and which to summarize
- Immediately see a count of relationships by entity type

The **Relationship Chart** component uses cutting edge technology (Microsoft Silverlight) combined with Microsoft CRM platform to produce complex organizational and customer relationships charts. c360 Relationship Charts includes the following features:

- Create relationship charts for any standard or custom entities
- Create Many-To-Many relationships on the chart between record nodes
- Create relationships between CRM records and entities outside CRM on the chart
- Drag and Drop functionality to easily re-structure the chart
- Set attributes for chart nodes and write free text notes for reference
- Quick access to record forms in CRM
- Access to record nodes' charts from the current chart
- Collapse mode to minimize the presented data

Installation Instructions

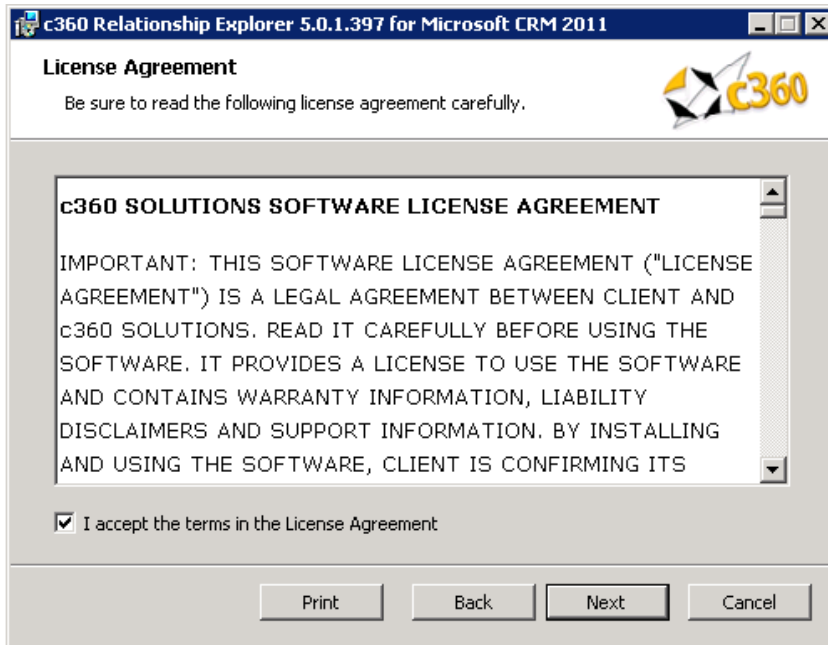
To install the product the installation application must be run on the CRM server by a user with Local Administrator and CRM Deployment Manager privileges. The user must also be a member of the CRM System Administrator role. The installation of c360 Record Editor for Microsoft CRM 2011 requires the c360 Relationship Explorer CRM2011.msi file which can be downloaded by visiting <http://www.c360.com/DownloadRegister.aspx>.

Steps to install c360 Relationship Explorer for Microsoft Dynamics CRM 2011

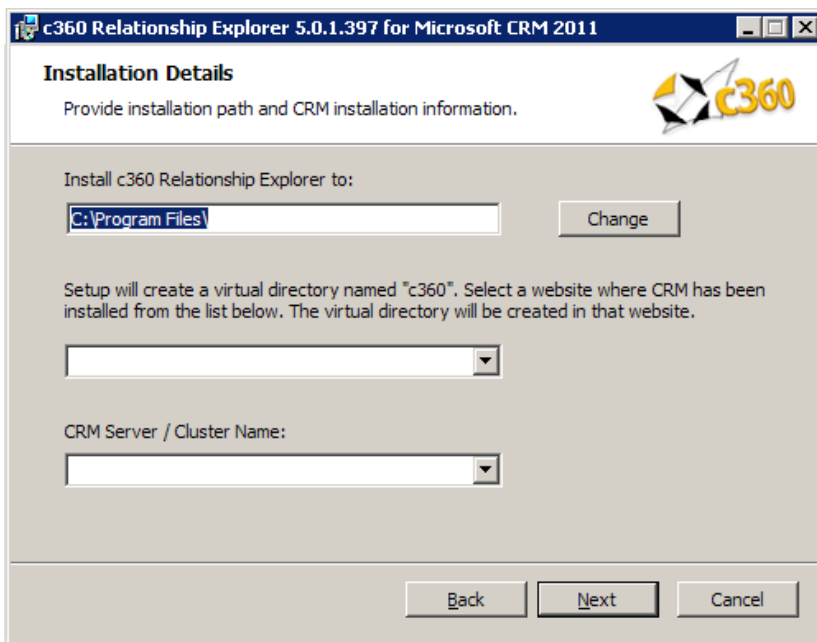
1. Extract the c360 Relationship Explorer crm2011.zip file into a folder on the Microsoft CRM server machine.
2. Double click the 'c360 Relationship Explorer for Microsoft CRM crm2011.exe' file. You will see the following screens.



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'.



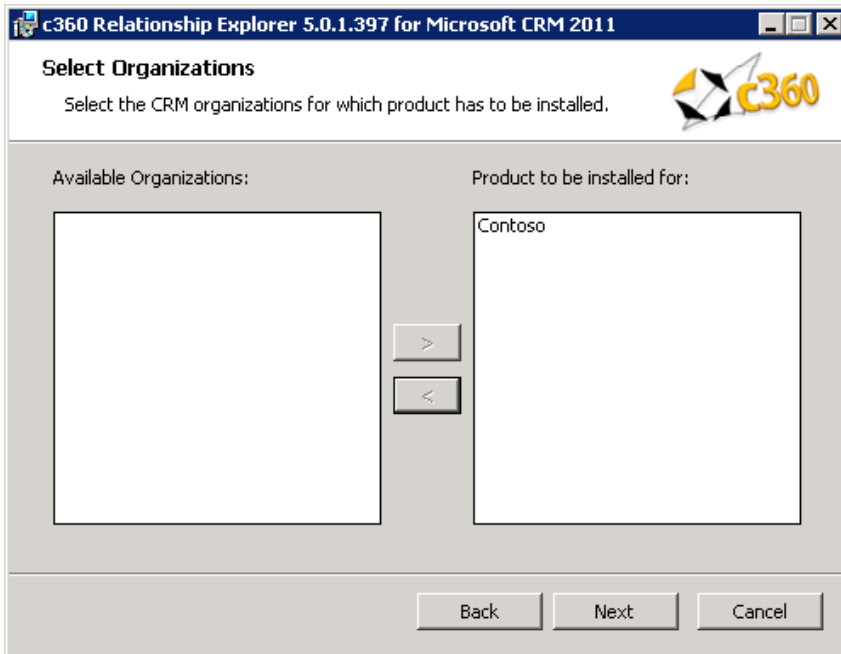
5. Accept the default entry for the installation path or modify. Select the CRM website and verify that the CRM Server / Cluster is correct. Click 'Next'.

Notes:

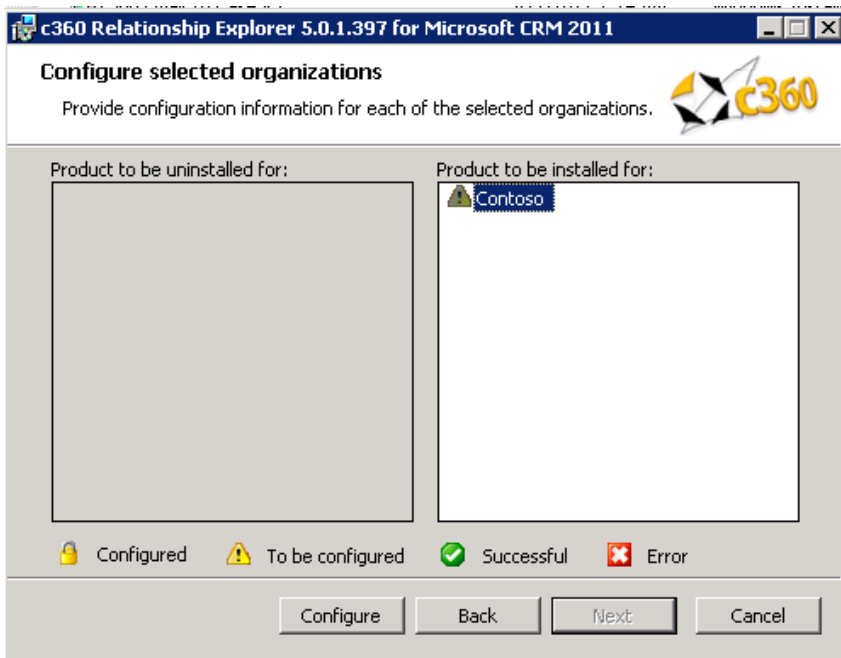
- CRM Server / Cluster Name: Name/ host header/ IP address of the server that is hosting the Microsoft CRM website.
- If any c360 products have previously been installed, this screen will not appear. All configuration settings from the previous install(s) will be used.
- If this is an IFD environment,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

A screenshot of the 'c360 Relationship Explorer Setup' dialog box. The title bar reads 'c360 Relationship Explorer 5.0.2.119 for Microsoft CRM 2011'. The main title is 'c360 Relationship Explorer Setup' with a sub-title 'Discovery Service URL'. The dialog contains several input fields: 'Enter Discovery Service URL' with the text 'http://nac360crm5/XRMServices', 'User Name:', 'Password:', 'Retype Password:', and 'Domain:'. At the bottom are three buttons: 'Back', 'Next', and 'Cancel'. The 'Next' button is highlighted with a black border.

6. 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:

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



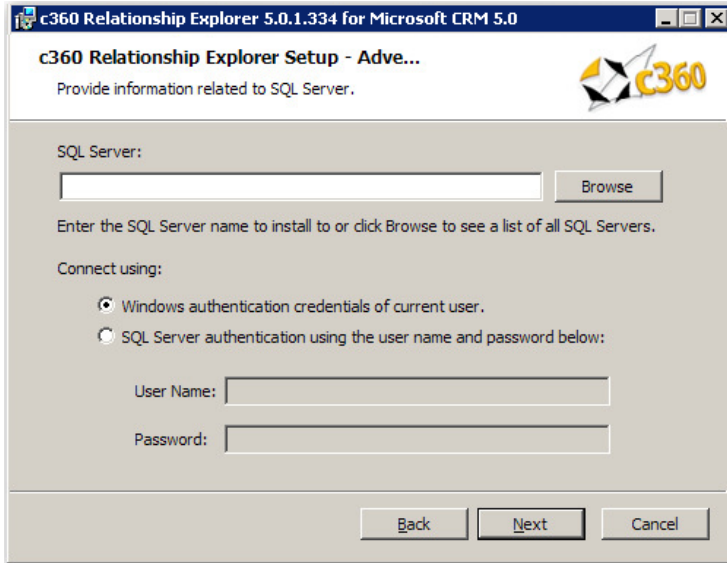
9. Enter the name, password and domain for the user who has privileges to create groups and add users to groups in Active Directory.

Click **'Next'**.

10. Select the Business Unit in which the Metadata Reader role will be created. Click **'Next'**.

Note:

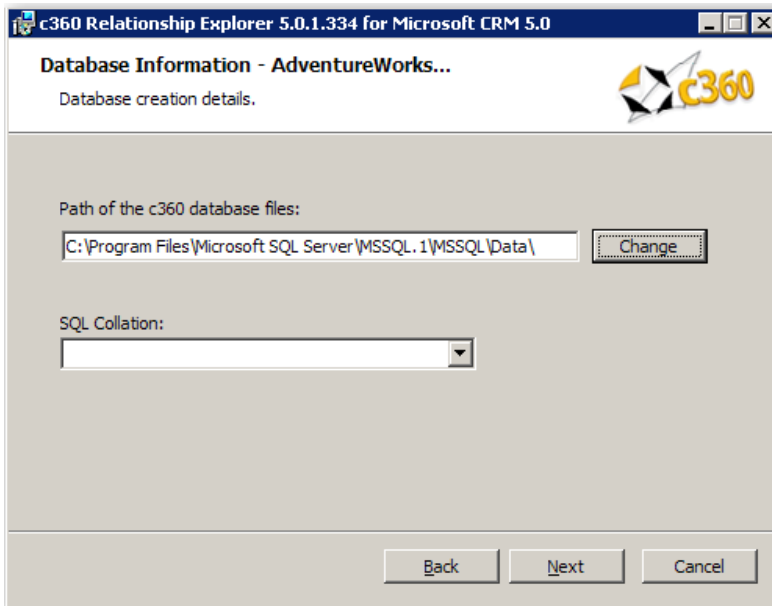
All users that have access to this role will be added automatically. Therefore, it is recommended that the root business unit for the organization be selected.



11. Enter the SQL server instance in which the c360 database for the organization will be installed, or click browse to choose from the list of available SQL server instances.

12. Choose Windows or SQL Authentication. Click **'Next'**.

Note: If you are supporting an IFD deployed environment, post installation you must modify the c360 and CRM connection strings to use SQL Authentication. These strings are located in the c360 global configuration area.

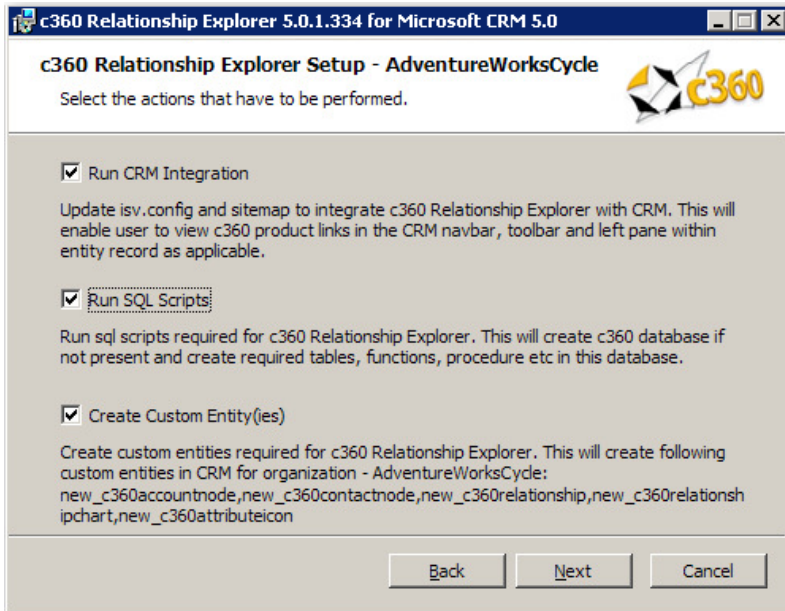


13. Select the path to install the database files.

14. Select the desired collation for the c360 database. Click **'Next'**.

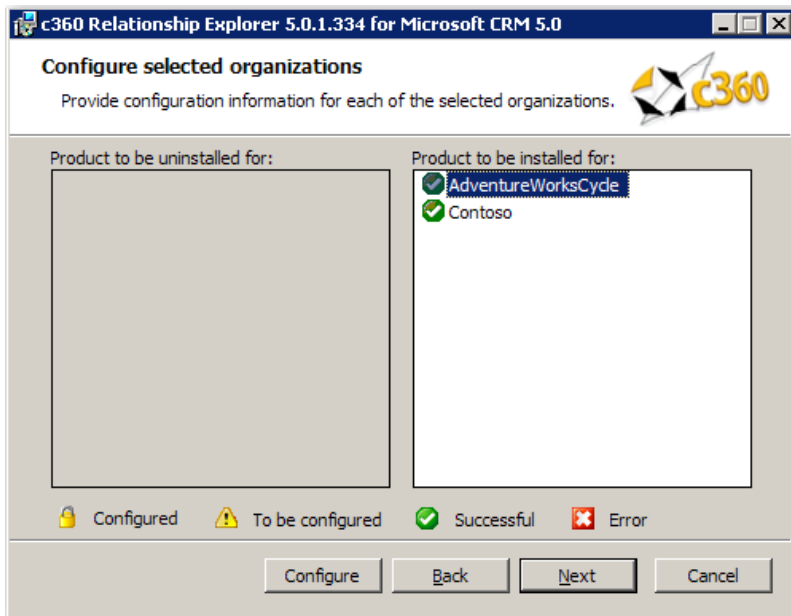
Note:

- This screen will not show up if another c360 product with a database has been installed on the same SQL server
- If installing on a clustered environment, manual installation of the database is required and no entries are required on this screen.

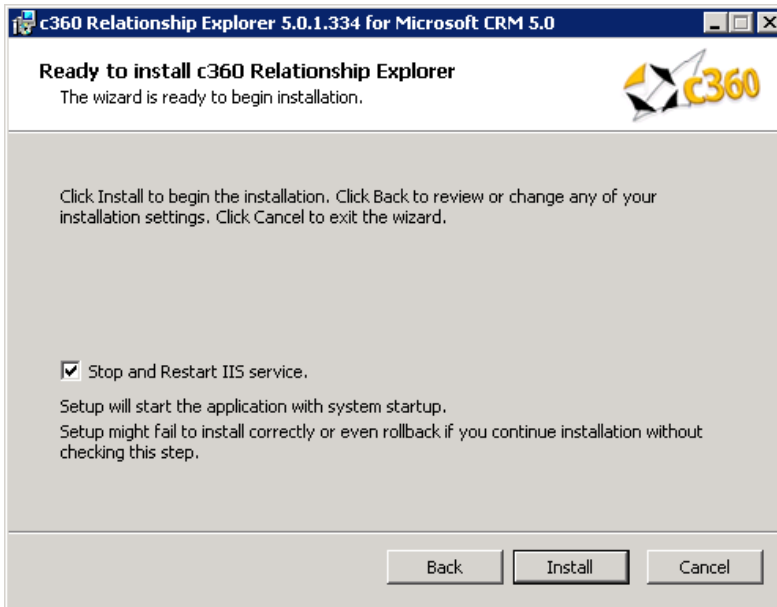


15. Select options to be performed during installation for the selected organization. Click **“Next”**.

Note: If installing on a clustered environment, uncheck 'Run SQL Scripts'. The installation will be performed manually. Please contact support@c360.com for assistance. If installing on a load-balanced environment, please see '**Additional Configurations**'.

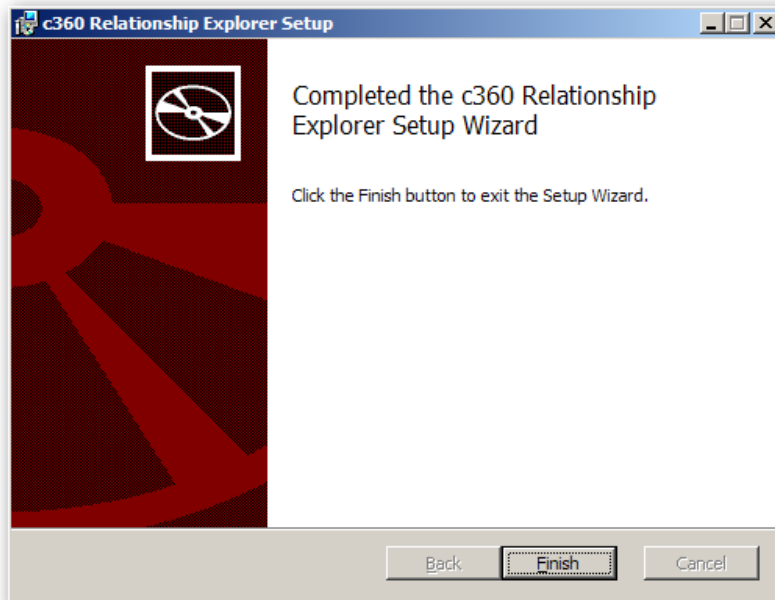


16. Repeat steps 8 – 15 until all organizations have been successfully configured. Then click **“Next”**.



17. Uncheck the IISReset option if an IISReset is undesirable at this time. Click **'Install'** to install c360 Relationship Explorer for Microsoft CRM 2011.

Note: Because an IISReset is required for the product, it is recommended that the installation be postponed until the IISReset action can be performed.



18. Click **'Finish'** to exit the installation wizard.



Created On : 3/23/2011 1:44:58 PM

Product : c360 Relationship Explorer

Contoso

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 successful
Update c360 Config	Successful	
Update Config Files	Successful	Successfully updated the config file.
Crm Integration	Successful	Successfully performed the Crm integration.
		There was an error in creating custom entitiesSystem.Exception: An error c entitiesSystem.Exception: Error occured while creating the web resource : Could n Solutions\W5\Install\c360Icon66x48.gif. at

19. 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 Relationship Explorer 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:

1. 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
2. `<add key='WebServicesUrl'
value='http://myservername:8000/MSCRMServices'/>`
3. Replace 'myservername' with the actual name of your CRM server or the hostname if your site is configured to use hostname.
4. Replace '8000' with the TCP port number your CRM website is using.
5. 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.

1. When installing on every node after the first, the check-boxes for running CRM Integrations, Creating Custom Entity(ies) and Running SQL Scripts should be un-selected.
2. 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:

1. 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.
2. 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 Relationship Explorer and Charting

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

If c360 Relationship Explorer/Charting for CRM 4.0 is already installed with valid licenses, those licenses will be valid for Relationship Explorer/Charting for CRM 2011. If you no longer have a valid license, or if this is a fresh installation of c360 Relationship Explorer/Charting 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 Relationship Explorer for Microsoft Dynamics CRM 2011

1. Re-run the c360 Relationship v4 for Microsoft CRM 2011.exe. Follow the process as described in Installation Instructions.
2. On step 8, note select the addition organization(s) to be installed.
3. Continue the process as described in the rest of the Installation Instructions.



Uninstall Instructions

Steps to uninstall c360 Relationship Explorer for Microsoft Dynamics CRM 2011

To uninstall all pieces of c360 Relationship Explorer/Charting, 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 Relationship Explorer/Charting.

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 Relationship Explorer/Charting from the list of the currently installed programs
3. Click '**Remove**'
4. Click '**Yes**' in the confirmation message box to begin the uninstall process.

Note: this will uninstall for all organizations

Option 2: From the c360 Relationship Explorer/Charting .exe

1. On the server, double click the c360 Relationship Explorer/Charting 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 Relationship Explorer/Charting

Steps to uninstall an organization for c360 Relationship Explorer for Microsoft Dynamics CRM 2011

1. Re-run the 'c360 Relationship Explorer for Microsoft CRM crm2011.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 Relationship Explorer 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.