



c360 Audit Installation Guide

Microsoft Dynamics CRM 3.0 compatible

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Overview and Notes

Overview

This document outlines the process for installing c360 Audit for Microsoft Dynamics CRM 3.0.

Microsoft CRM Compatibility

c360 Audit for Microsoft Dynamics CRM 3.0 is compatible with Microsoft Dynamics CRM version 3.0. For additional product information, please visit <http://www.c360.com/Audit.aspx>.

c360 Audit for Microsoft Dynamics CRM 3.0

c360 Audit is a Microsoft CRM enhancement that allows you to **Track** and **Analyze** all changes made to CRM. The components of c360 Audit are

1. **Audit Tracker**
2. **Audit Analyzer**

The **Audit Tracker** component captures all changes made to CRM data including **custom entities** and **custom fields**. Using the Audit Tracker, organizations will be able to:

- Track all changes made to CRM data including contact save, lead conversions, quote deletions, updating of account fields
- See the big picture view of the complete audit trail with the ability to drill down and open any CRM record with a single click
- See the before and after picture of every CRM save event
- User customizable view to see only the fields that are most critical
- See HOW an Account got its current status; Your existing CRM system is just a snapshot but using Audit, you can now see HOW
- Increase compliance with legal regulations such as SOX, HIPAA, The Privacy Act, and others by maintaining a verifiable audit trail

The **Audit Analyzer** component is a powerful **Business Intelligence** system that lets you analyze historical CRM information to gain a better understanding of your customers. Using the Audit Analyzer, Microsoft CRM users will be able to:

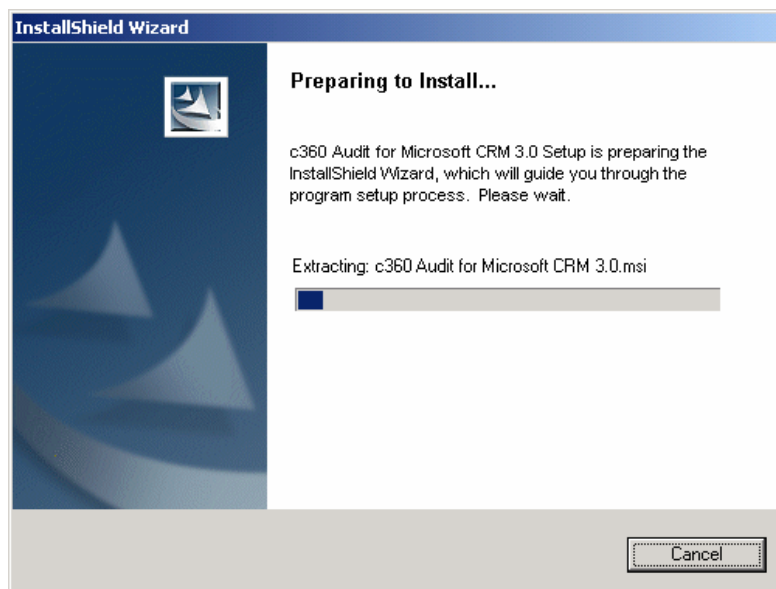
- Get critical insight to your historical CRM data by creating specialized queries like '**negative queries**', '**OR queries**' using special operators such as 'increased', 'not changed' etc
- Sales can now more easily identify 'stuck opportunities' in the funnel by creating the negative query "Show me all hot opportunities where status code has not changed in the last month"
- Create complicated 'OR queries' such as "All opportunities where the Estimated Amount has changed OR the Account Type has changed"

Installation Instructions

To install the product the installation application must be run on the CRM server by a user with Domain Administrator privileges. The installation of c360 Audit for Microsoft CRM 3.0 requires the c360 Audit V3.exe file which can be downloaded by visiting <http://www.c360.com/DownloadRegister.aspx>.

Steps to install c360 Audit for Microsoft Dynamics CRM 3.0

1. Extract the c360 Audit V3.zip file into a folder on the Microsoft CRM server machine.
2. Double click the 'c360 Audit V3.exe' file. You will see the following screens.





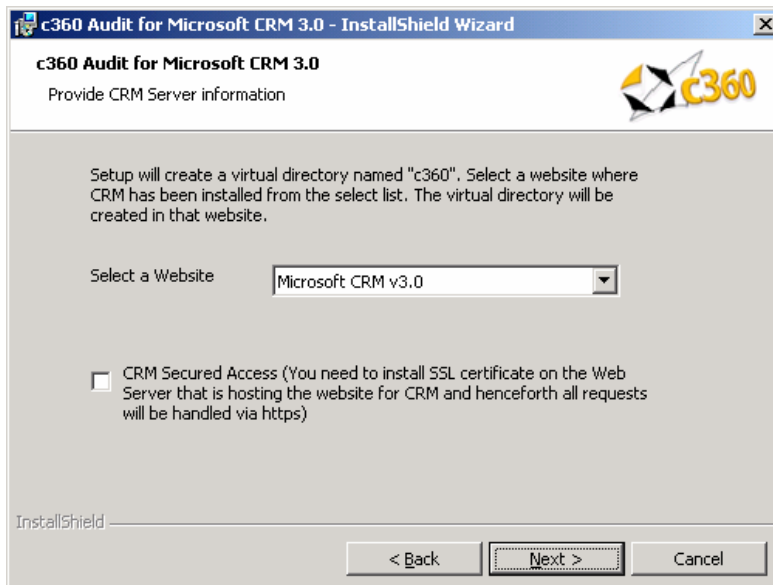
3. Click **'Next'** to begin the installation process.



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'**.

Note:

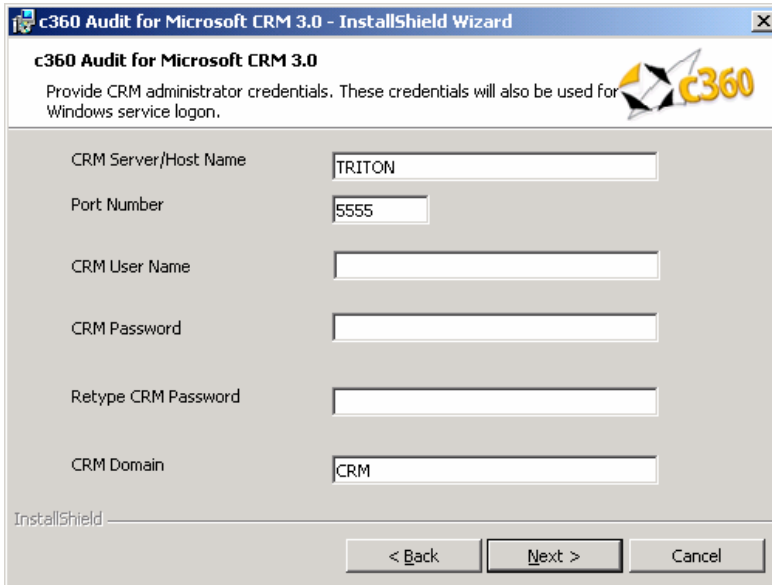
On clicking next, the following dialog informing that the CRM website will be stopped will appear. Click 'Yes' to continue the installation process. If you do not wish to stop the website now, click 'No' to abort the setup and install the product at a later time.



5. Check if the option selected in this field by default is correct and click **'Next'**. If not, select the correct value. Then click **'Next'**.

Notes:

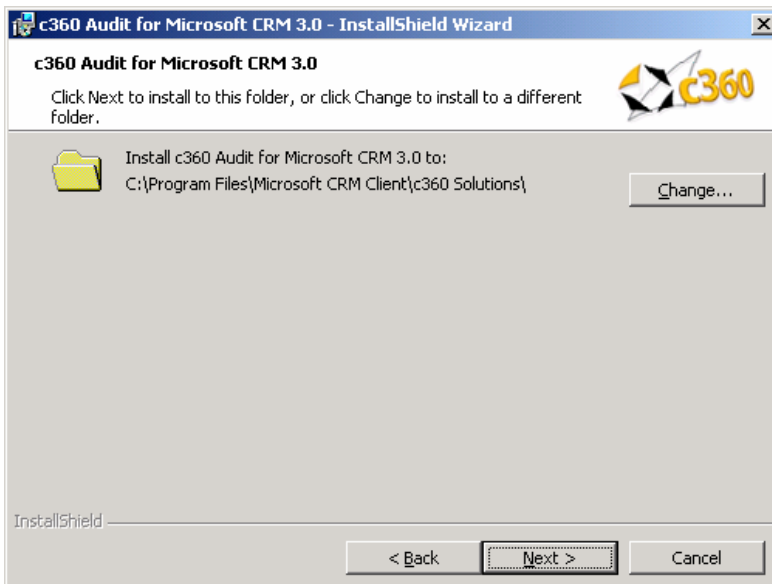
- Website: Name of the Microsoft CRM website.
- Check CRM Secured Access option if it is a secure connection.



6. Check if the entries made in these fields by default are correct. If not, enter the correct values. Enter the user name and password of the CRM user who has system administrator role in CRM. Click **'Next'**.

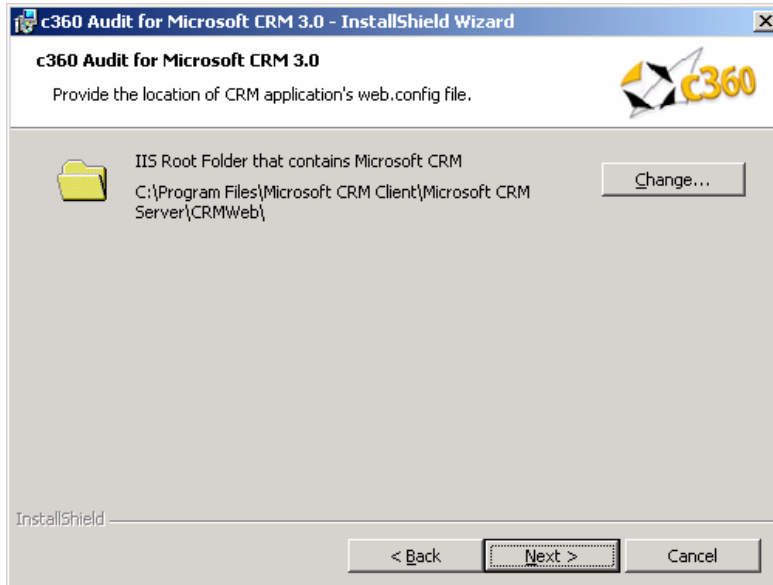
Note:

- CRM Server name: Name/ host header/ IP address of the server that is hosting the Microsoft CRM website.
- Port Number: TCP port number where the CRM website is installed.
- CRM Domain: Domain name of your CRM server machine.



7. Click **'Next'** to install to the folder in the default directory
OR
Click **'Change'** and select the destination folder of your choice. Then click **'Next'**.

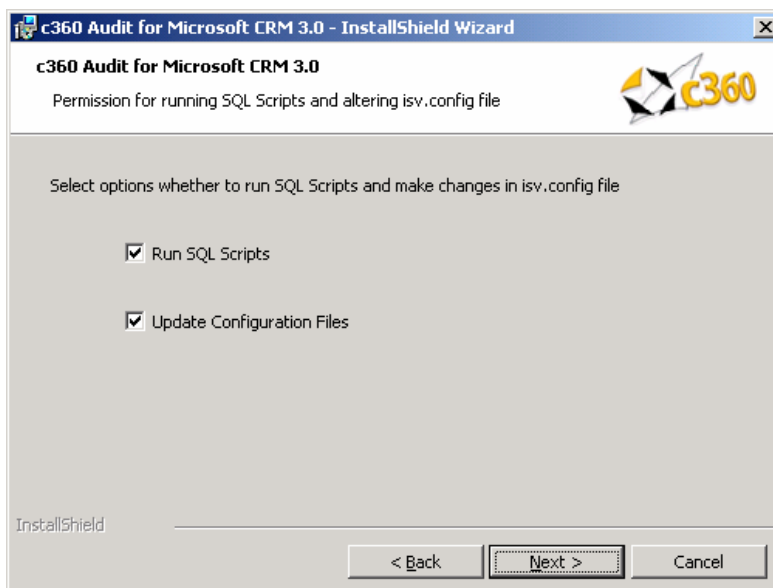
Note: This screen will not appear if c360 virtual directory already exists in the Microsoft CRM3.0 website.



8. Verify that the Microsoft CRM web.config file is located in the default directory and click **'Next'**.

OR

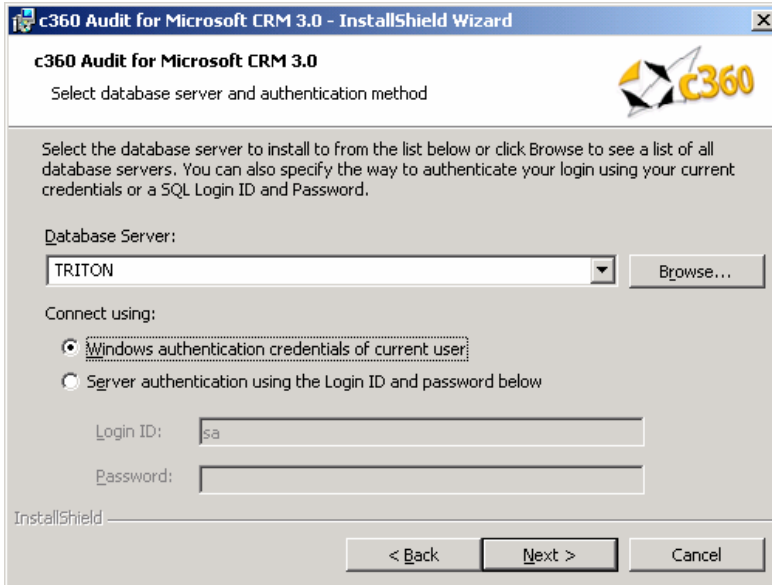
Click **'Change'** and select the correct location of the Microsoft CRM web.config file. Then click **'Next'**.



9. Click **'Next'** if you want to 'Run SQL scripts' and 'Update Configuration files'. If not, uncheck the option(s) not required and then click 'Next'.

Note:

- Run SQL scripts: Installs the c360_Solutions_CRM_Audit Database (if not already existing). If unchecked, the SQL scripts can be run post installation. You will have to contact c360 Support for additional information regarding this.
- Update Configuration files: Updates CRM's sitemap and isv.config file for integration of the c360 product with Microsoft CRM. If unchecked, this customization can be implemented post installation. For this, in CRM, navigate to c360 Settings > c360 Configuration Center OR access the url <http://crmserver:port/c360/Toolkit/Configuration/Configurator.aspx> and click on the 'Integrate' button for the product.

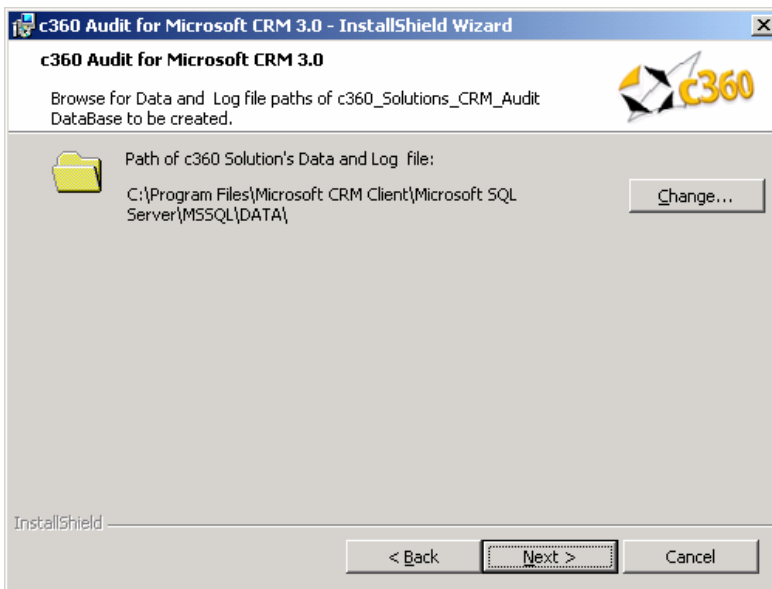


10. Click **'Next'** to install c360_Solutions_CRM_Audit database to the default SQL server.

OR

Select one from the select list or by clicking on 'Browse'. Then click **'Next'**.

Note: You must provide your user ID and password if you choose SQL server authentication.

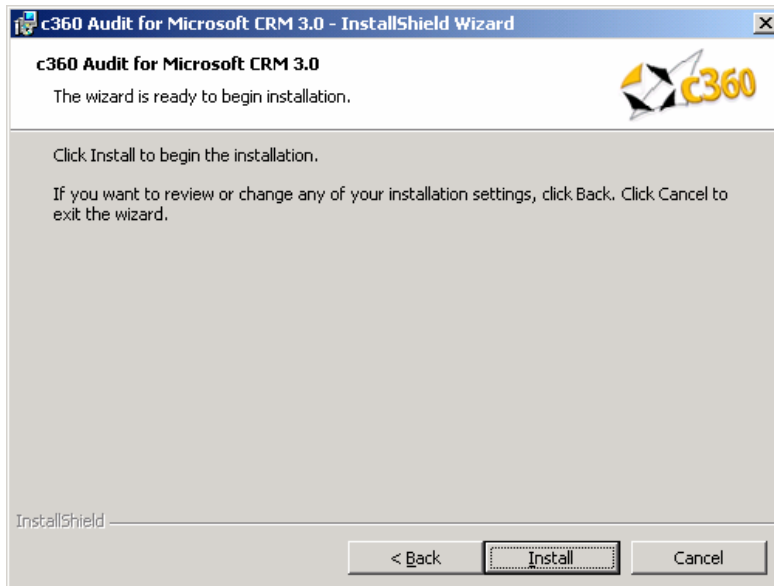


11. Click **'Next'** if the Data and Log file path of the c360_Solutions_CRM_Audit Database is to be the default one.

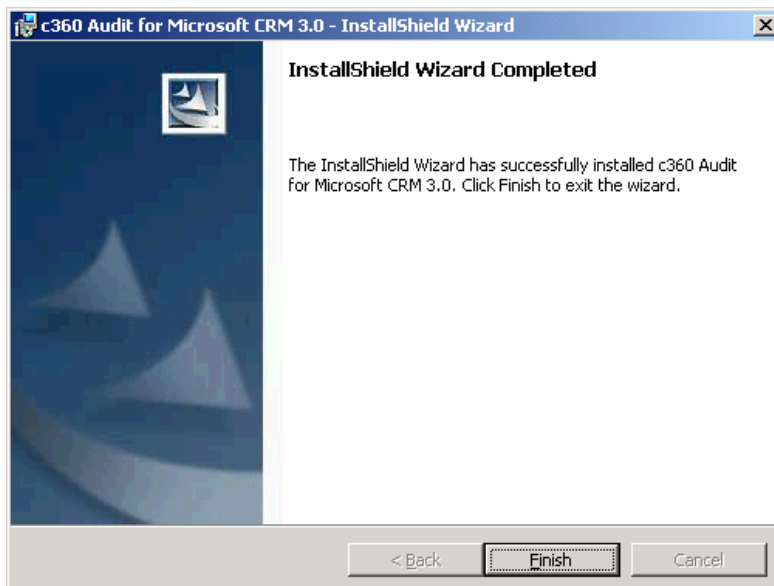
OR

Click 'Change' and browse to select a different path.

Note: This screen will not appear if the c360_Solutions_CRM_Audit database already exists on the SQL server selected on the previous screen. Instead an alert informing that the database already exists will appear.



12. Click **'Install'** to install c360 Audit for Microsoft CRM 3.0.



13. Click **'Finish'** to exit the InstallShield wizard.

The installation of c360 Audit for Microsoft CRM 3.0 is now complete. For the product to track changes and display them a valid license file must be installed if it is not already present. For questions about obtaining and/or installing a valid license file please refer to the section of this document titled 'Licensing'.



Additional Configurations

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 Audit 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 \\3\ 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'.

Troubleshooting

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



Licensing

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 3.0 installations for organization names 'Adventure Works Cycle Demo', 'Adventure Works Cycle' or 'Microsoft CRM', please visit our website at <http://www.c360.com/Licenses.aspx>



Uninstall Instructions

Steps to uninstall c360 Audit for Microsoft Dynamics CRM 3.0

1. On the CRM server where you installed the product navigate to 'Control Panel' and open 'Add or Remove Programs'
2. Select c360 Audit for Microsoft CRM 3.0 from the list of the currently installed programs
3. Click 'Remove'
4. Click 'Yes' in the confirmation message box to begin the uninstall process.



International Languages ---

c360 Audit for Microsoft Dynamics CRM 3.0 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.