



c360 Explorer Service Installation Guide

Microsoft Dynamics CRM 4.0 compatible

c360 Solutions, Inc.
www.c360.com

Products@c360.com



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Overview and Notes

Overview

This document outlines the process for installing c360 Explorer Service for Microsoft Dynamics CRM 4.0.

Microsoft CRM Compatibility

c360 Explorer for Microsoft Dynamics CRM 4.0 is compatible with Microsoft Dynamics CRM version 4.0. For additional product information, please visit http://www.c360.com/Explorer_Service.aspx.

Prerequisites

For using the WDS search provider, Windows Desktop Search 3.0.1 or greater must be installed on the CRM Server.

c360 Explorer for Microsoft Dynamics CRM 4.0

c360 Explorer provides near instant search of all CRM data by constantly indexing all CRM records and attachments and leveraging Microsoft Office SharePoint Search (MOSS) to search the indexed information. Explorer simplifies and expedites retrieval of information regardless of where it has been entered in CRM.

- Unlock the value of your of your CRM data by searching and exploring all CRM data in a single user friendly screen
- Perform Broad-based search and refinement:
 - Start with a 'broad-based' keyword search and then quickly refine the results and explore all activities, emails, relationships, related entities, attachments, etc in one single screen
- View snapshot data right within the search results

The Explorer Service installation will install the component that performs the indexing of all CRM data and serves as the endpoint for Explorer searches.

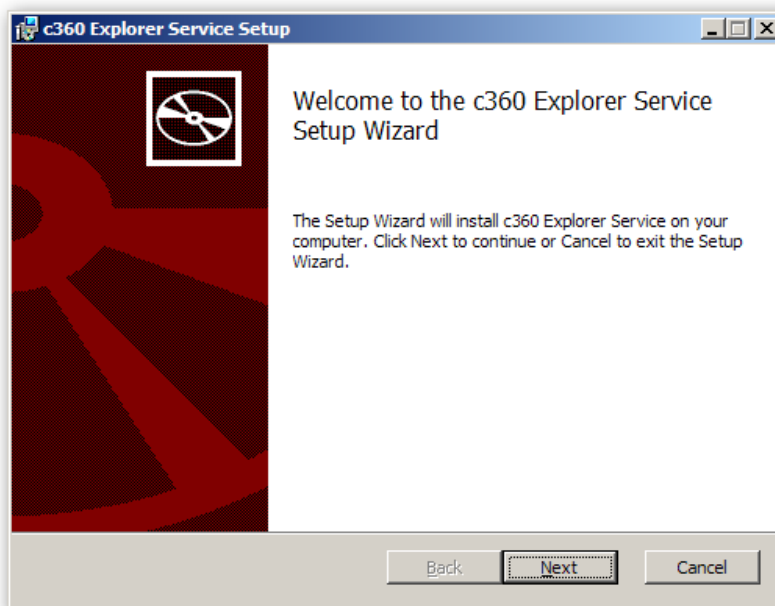


Installation Instructions

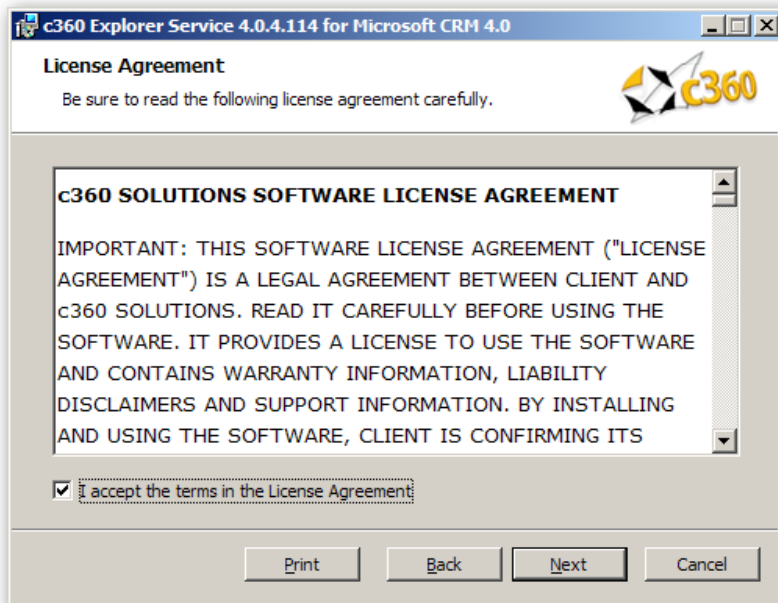
To install the product the installation application must be run on the CRM server by a user with Domain Administrator privileges. The installation of c360 Explorer Service for Microsoft CRM 4.0 requires the c360 Explorer Service V4.exe file which can be downloaded by visiting <http://www.c360.com/DownloadRegister.aspx>.

Steps to install c360 Explorer Service for Microsoft Dynamics CRM 4.0

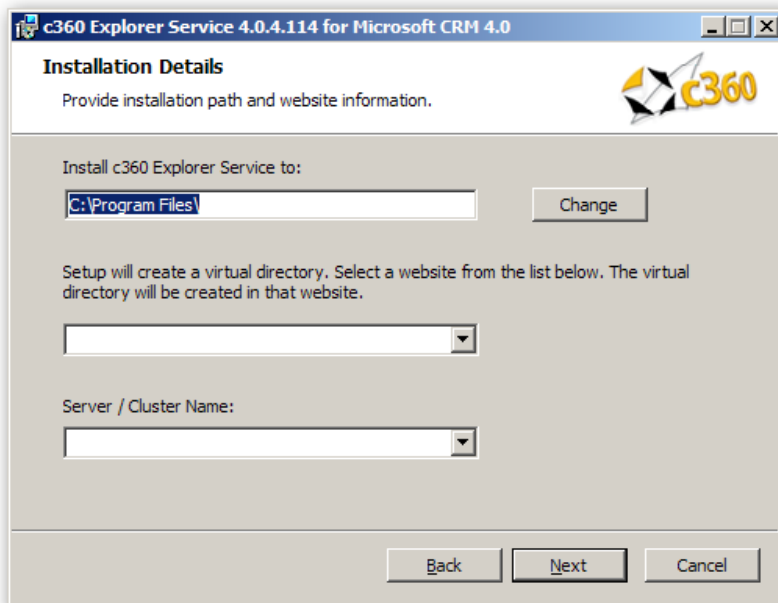
1. Extract the c360 Explorer Service V4.zip file into a folder on the Microsoft CRM server machine.
2. Double click the 'c360 Explorer Service for Microsoft v4.exe' file. You will see the following screens.



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 website in which to install. Verify that Server / Cluster is correct. Click **'Next'**.

Notes:

- Server / Cluster Name: Name/ host header/ IP address of the server that is hosting the website.
- The Explorer Service must be installed in a website on the CRM server in order to support the WDS search engine. c360 Solutions recommends using the Microsoft CRM web site.
- If c360 Explorer has already been installed, then the installation path must be the same as chosen for the Explorer installation.



The screenshot shows a dialog box titled "c360 Explorer Service 4.0.4.114 for Microsoft CRM 4.0". The main heading is "CRM Server Details" with the instruction "Provide CRM Server information." Below this, there are three input fields: "CRM Server Host:" with a text box, "CRM Server Port:" with a text box, and "Secured:" with an unchecked checkbox. A note at the bottom states: "CRM Server information will be used by the setup for communicating with CRM discovery service during installation of the product." At the bottom of the dialog are three buttons: "Back", "Next", and "Cancel".

6. Enter the Microsoft CRM Host URL and Port. Click **'Next'**.

The screenshot shows a dialog box titled "c360 Explorer Service 4.0.4.114 for Microsoft CRM 4.0". The main heading is "c360 Explorer Service Setup" with the instruction "Product to be installed." Below this, there is a list box containing a single item "Explorer Service" which is selected. At the bottom of the dialog are three buttons: "Back", "Next", and "Cancel".

7. Click **'Next'**.



Search End-Point Details
Provide search end-point.

Select Search End-Point:
 WDS MOSS

Explorer Service will use the selected search end point to index CRM information. Further it will communicate with the search end point using the provided credential.

Search Provider Administrator Username:

Search Provider Administrator Password:

Retype Administrator Password:

Search Provider Domain Name:

Back Next Cancel

8. Enter the credentials for the search endpoint administrator. Then click **'Next'**.

Note:

- The search provider must be installed for installation to continue. If not installed, cancel the setup, install the search provider and re-run the setup.

Select Organizations
Select the CRM organizations for which product has to be installed.

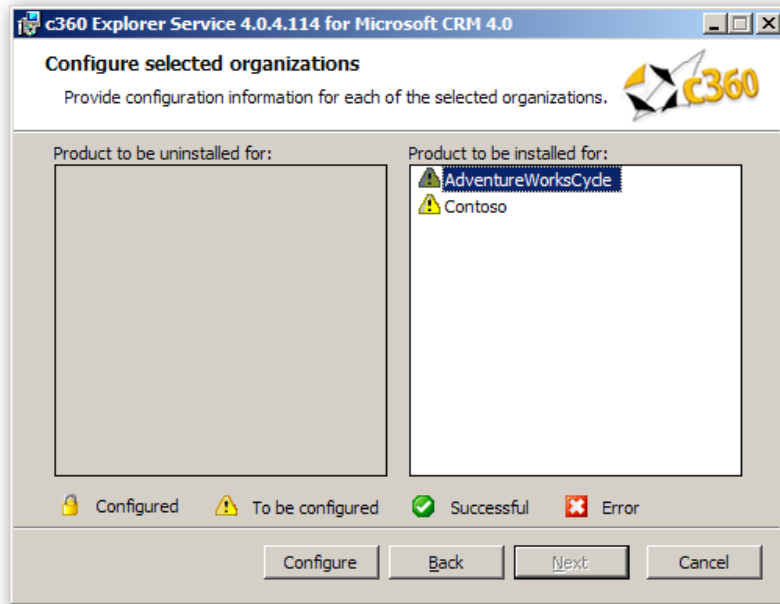
Available Organizations:

Product to be installed for:

> <

Back Next Cancel

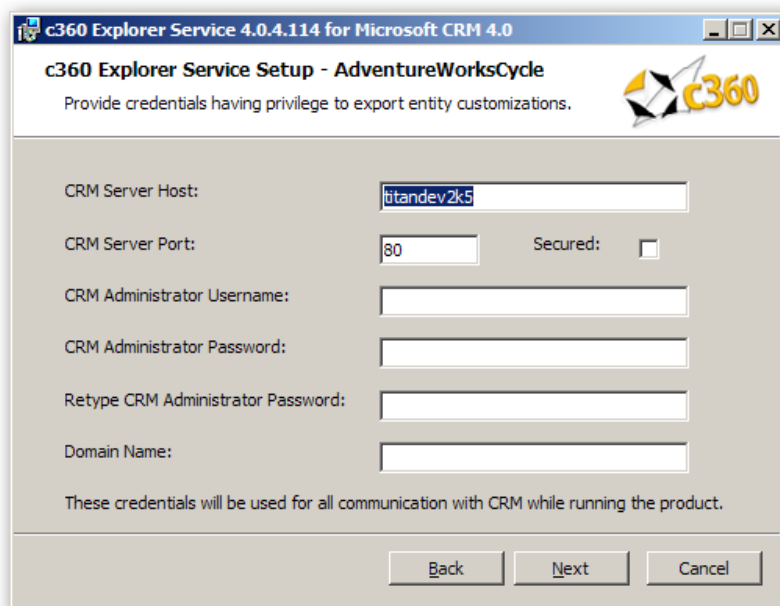
9. Select the Organization(s) for which the product is to be installed. Then click **'Next'**.



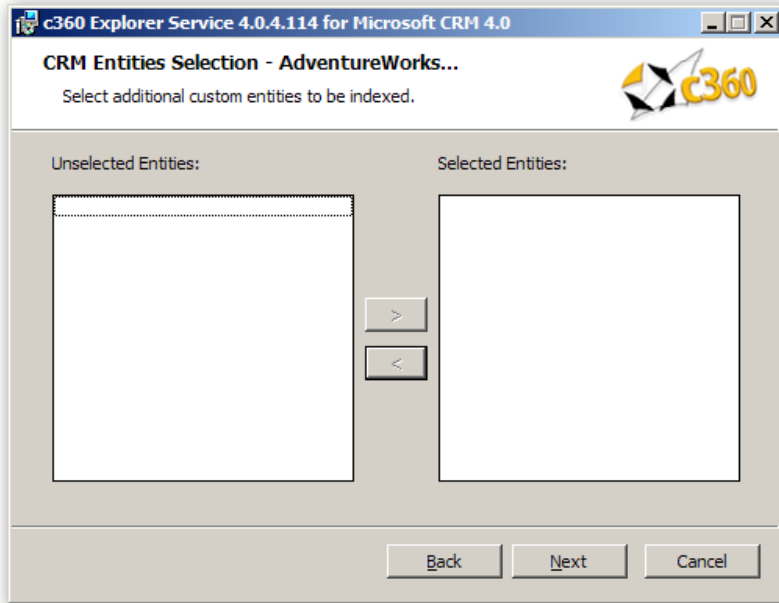
10. Select one Organization for which the product is to be configured (In this case, 'Contoso'). Then click **'Configure'**.

Note:

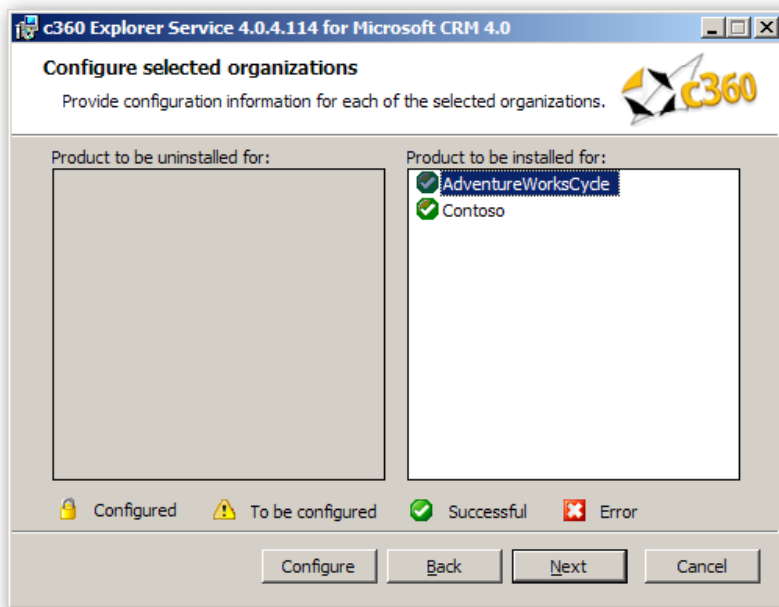
- To be configured: The organization has not been configured for installation.
- Successful: The organization has been configured and configuration settings have been validated. The product is ready to be installed for the organization.
- Error: There has been an error in validating the configuration 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.



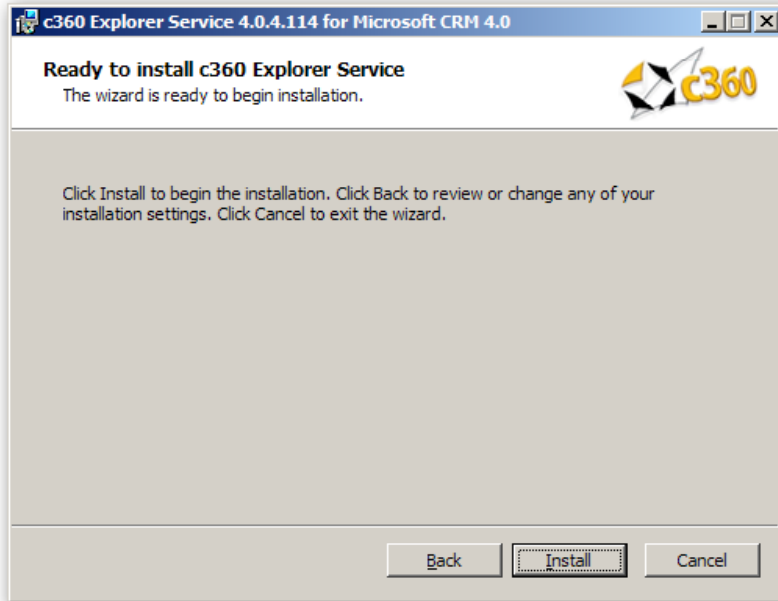
11. Enter the name, password and domain for the CRM user who has privileges to export entity customizations for the organization being configured. Click **'Next'**.



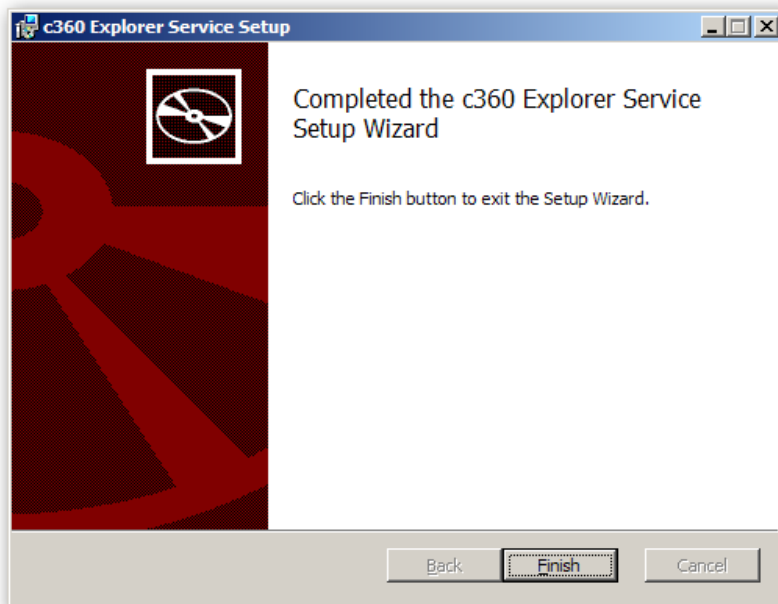
12. Select any custom entities to be included in search requests. Click **'Next'**.



13. Repeat steps 8 – 12 until all organizations have been successfully configured. Then click **'Next'**.



14. Click **'Install'** to install c360 Explorer Service for Microsoft CRM 4.0.



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



Created On : 7/29/2008 4:01:53 PM

Product : c360 Explorer Service

AdventureWorksCycle

Name	Status	Message
CreateFolders	Successful	Successfully created Folders
OrganizationSpecificFiles	Successful	
Update Config Files	Successful	Successfully updated the config file.
CustomConfiguration	Successful	Config successfully updated for Organization: AdventureWorksCycle, Product: c360 Explorer Service

Contoso

Name	Status	Message
CreateFolders	Successful	Successfully created Folders
OrganizationSpecificFiles	Successful	
Update Config Files	Successful	Successfully updated the

16. A summary of the installation will appear.



Additional Configurations_____

Troubleshooting

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



Installing additional organizations _____

Steps to install additional organizations for c360 Explorer Service for Microsoft Dynamics CRM 4.0

1. Re-run the c360 Explorer Service for Microsoft CRM v4.exe. Follow the process as described in Installation Instructions.
2. On step 7, note select the addition organization(s) to be installed.
3. Continue the process as described in the rest of the Installation Instructions.
4. Once install is complete, restart the 'Windows Search' service.



Uninstall Instructions

Steps to uninstall c360 Explorer Service for Microsoft Dynamics CRM 4.0

1. On the CRM server where you installed the product navigate to 'Control Panel' and open 'Add or Remove Programs'
2. Select c360 Explorer Service 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. Once uninstall is complete, restart the 'Windows Search' service.

Steps to uninstall an organization for c360 Explorer Service for Microsoft Dynamics CRM 4.0

1. Re-run the 'c360 Explorer Service for Microsoft CRM v4.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.
5. Note: multiple organizations can be uninstalled at once.
6. Once uninstall is complete, restart the 'Windows Search' service.