



## **c360 Field Level Security Installation Guide**

Microsoft Dynamics CRM 3.0 compatible

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## Overview and Notes

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### Overview

This document outlines the process for installing c360 Field Level Security for Microsoft Dynamics CRM 3.0.

### Microsoft CRM Compatibility

c360 Field Level Security 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/FieldLevelSecurity.aspx>

### c360 Field Level Security for Microsoft Dynamics CRM 3.0

c360 Field Level Security enhances the security capability of Microsoft CRM 3.0 by restricting access to CRM data on a field level basis.

By using Field-Level Security, administrators can define security privileges for any field in a CRM entity (including **custom entities**) and be sure that access is only available to the users who are allowed to see it. The fields can be **disabled** (read-only), **forbidden** (deny access) or **hidden** (remove field from view) for any CRM security role in a business unit (or team), thus allowing dynamic field privilege access while maintaining the CRM security model.

Field-Level Security ensures that fields are secured from all areas of CRM including entity forms, CRM Views, Advanced Find views, Lookup views, Bulk Edit, Excel Export, Print pages, Form Assistant, Merge Forms.

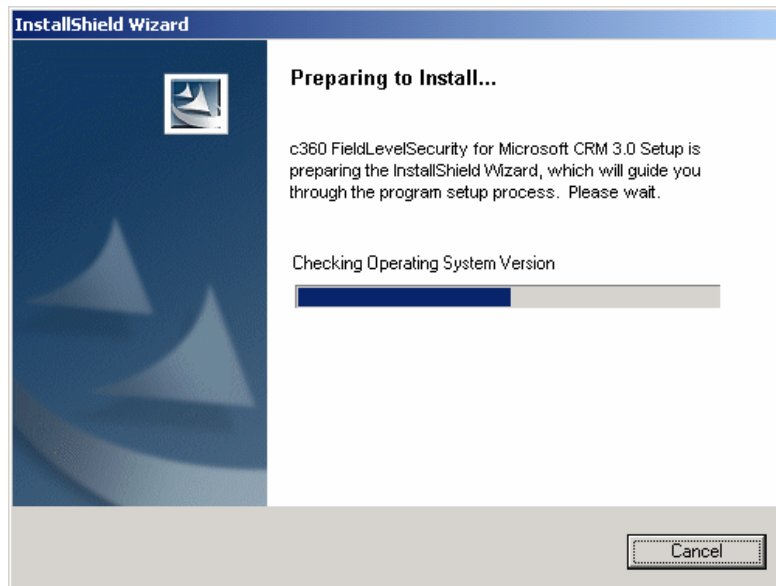
## Installation Instructions

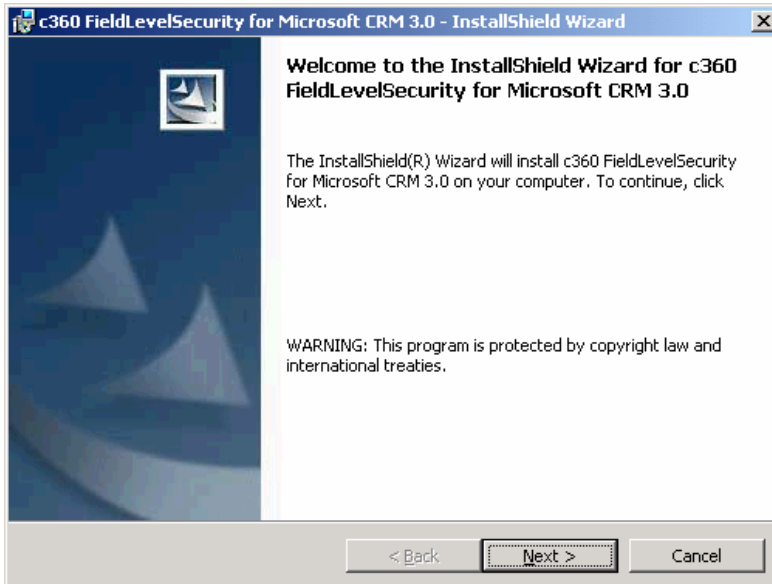
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To install the product the installation application must be run on the CRM server by a user with Domain Administrator privileges. The installation of c360 Field Level Security for Microsoft CRM 3.0 requires the c360 Field Level Security V3.exe file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

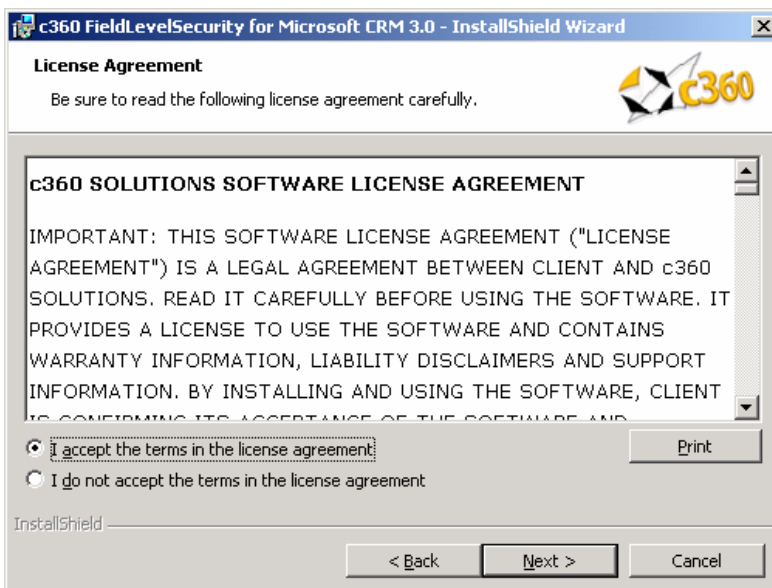
### Steps to install c360 Field Level Security for Microsoft Dynamics CRM 3.0

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

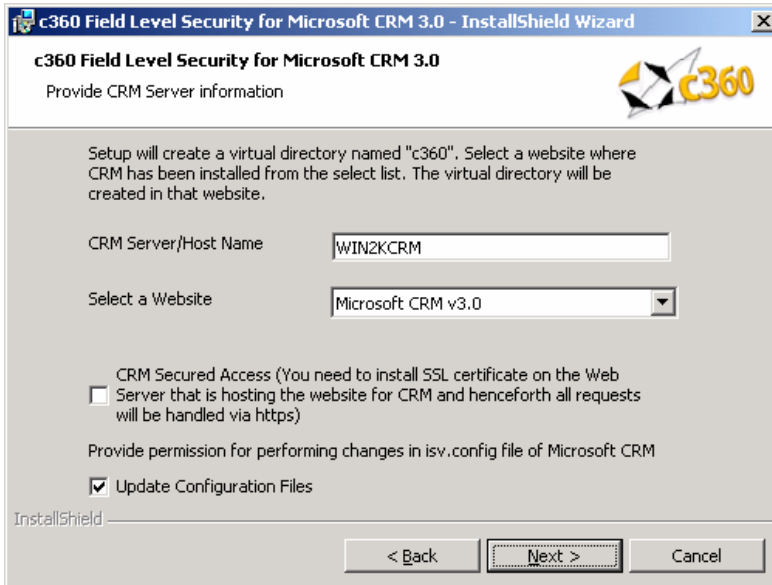




3. Click **'Next'** to begin the installation process.



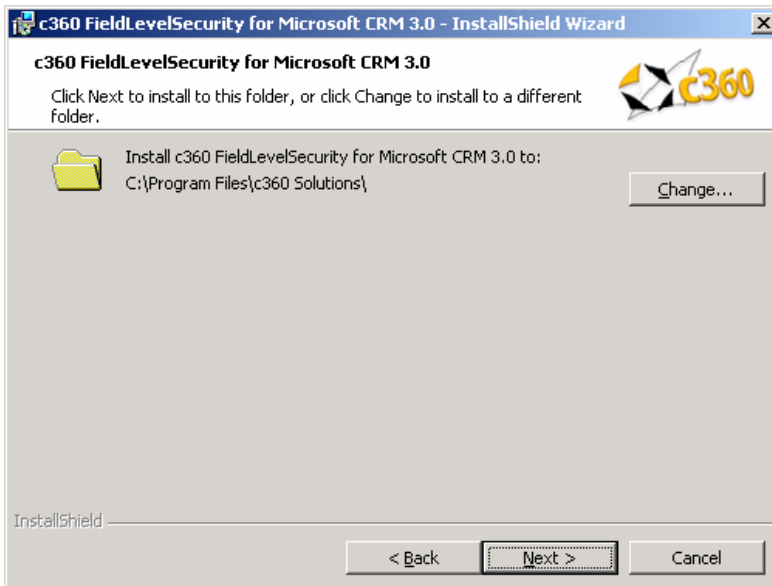
4. If you agree with the terms of the license agreement, select the option labeled 'I accept the terms in the license agreement' and click **'Next'**.



5. Check if the entries made in these fields by default are correct and click **'Next'**. If not, select the correct values. Then click **'Next'**.

**Note:**

- CRM Server name: Name/ host header/ IP address of the server that is hosting the Microsoft CRM website.
- Website: Name of the Microsoft CRM website.
- Check CRM Secured Access option if it is a secure connection.
- Update Configuration files: Updates CRM's sitemap and isv.config file for integration of the c360 product with Microsoft CRM.



6. 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'**.

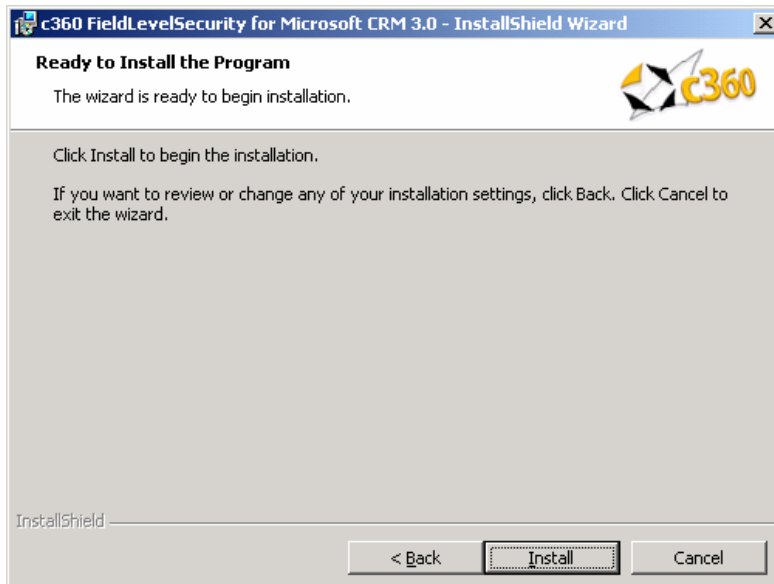
**Note:** This screen will not appear if c360 virtual directory already exists in the Microsoft CRM3.0 website.



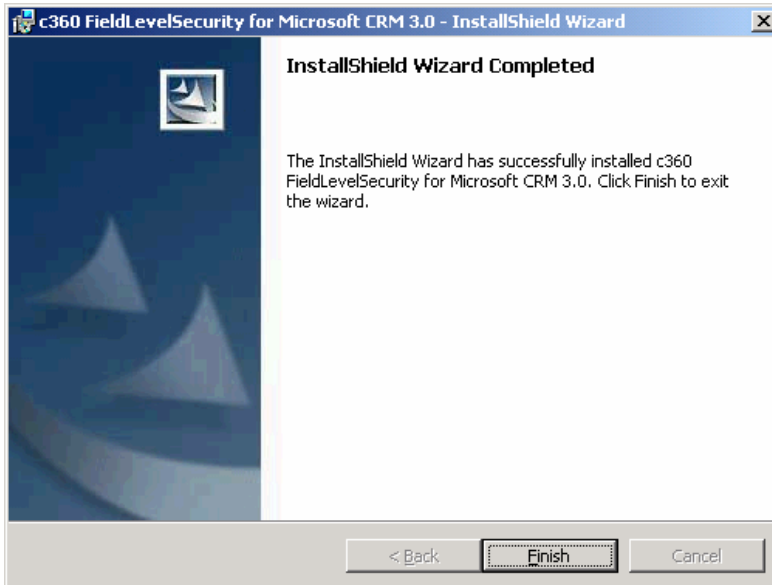
7. Verify that the Microsoft CRM web.config file is located in the default directory and click **'Next'**.

**OR**

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



8. Click **'Install'** to install c360 Field Level Security for Microsoft CRM 3.0.



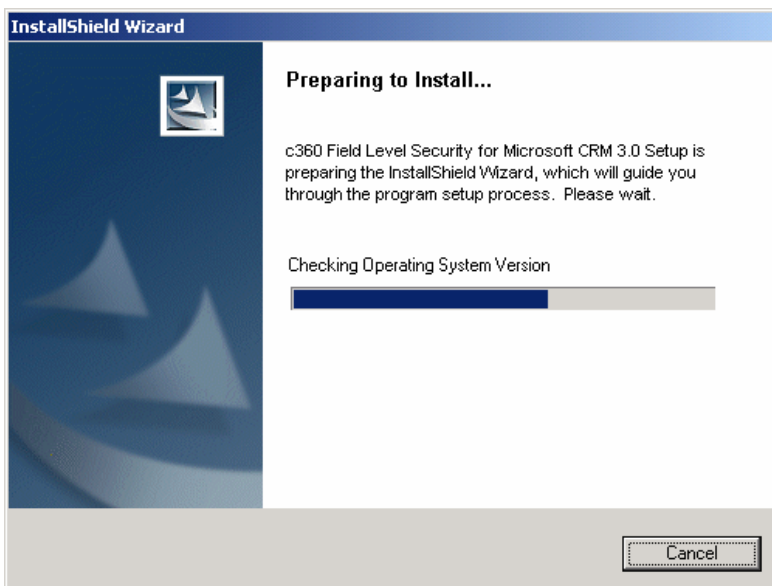
9. Click '**Finish**' to exit the InstallShield wizard.

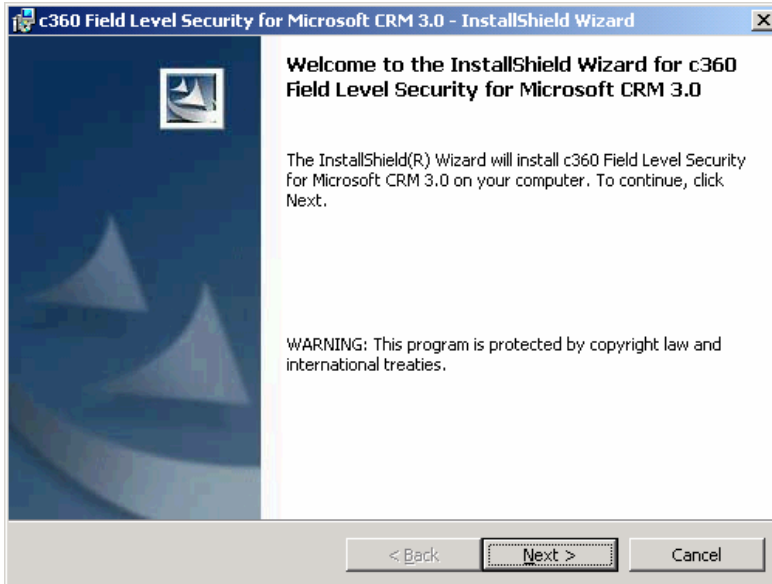
The installation of c360 Field Level Security for Microsoft CRM 3.0 on the CRM server is now complete.

To access the product and use it 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'.

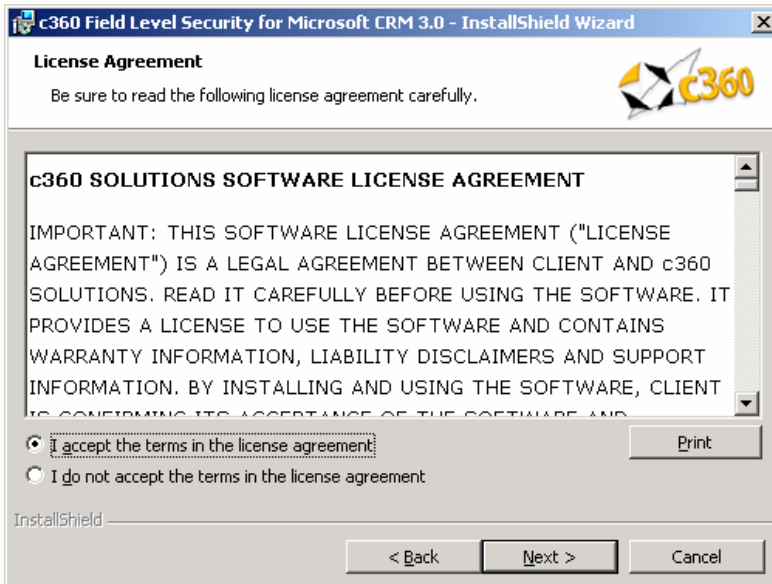
### Steps to install Field Level Security on the Laptop client for Microsoft CRM 3.0

1. Extract the c360 Field Level Security V3.zip file into a folder on the Laptop client machine.
2. Double click the 'c360 Field Level Security V3.exe' file. You will see the following screens.

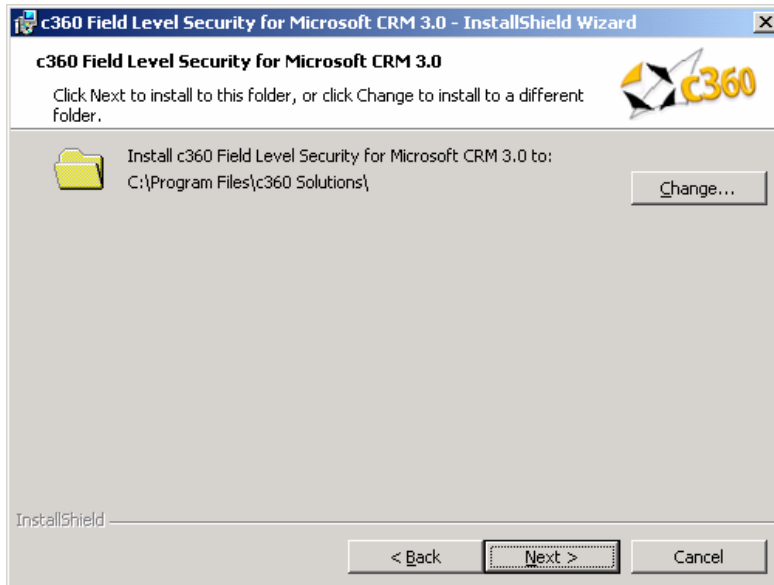




3. Click **'Next'** to begin the installation process.

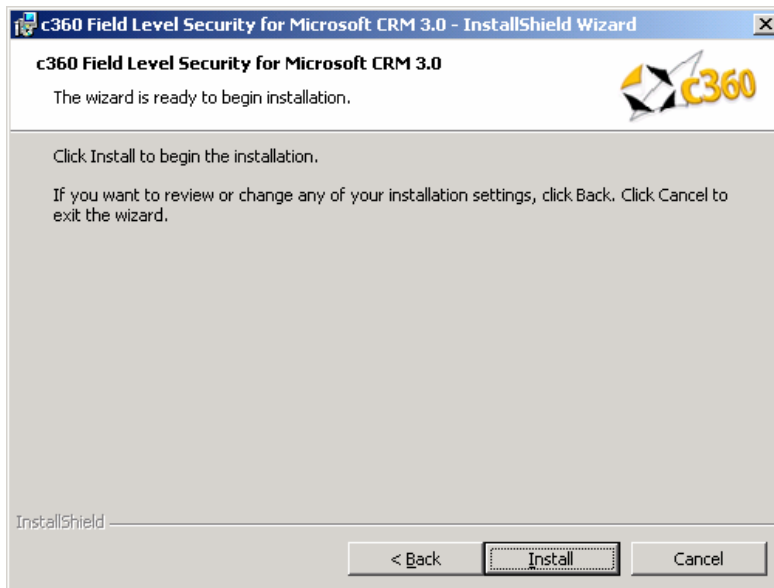


4. If you agree with the terms of the license agreement, select the option labeled 'I accept the terms in the license agreement' and click **'Next'**.

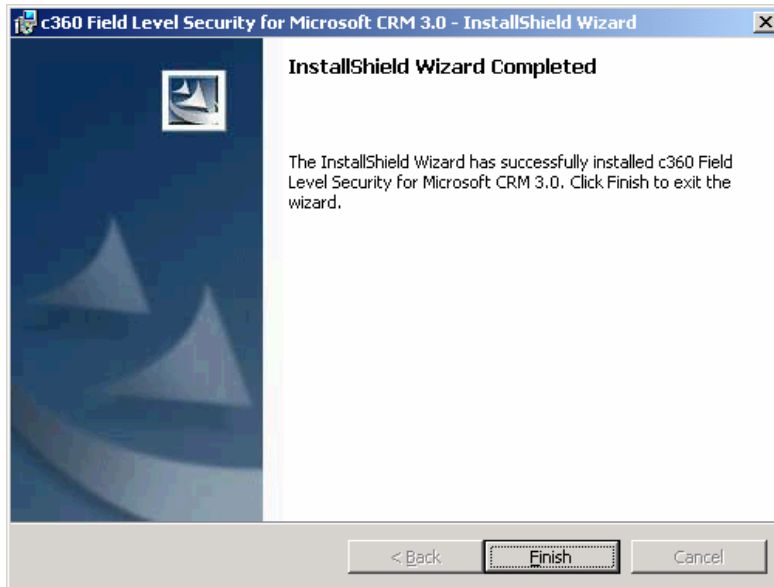


5. Click **'Next'** to install to the folder in the default directory  
**OR**  
Click **'Change'** and select the destination folder of your choice. Then click **'Next'**.

Note: This screen will not appear if V3 folder already exists on the client machine. (For instance: when MCM is already installed on the laptop client machine).



6. Click **'Install'** to install Field Level Security on the Laptop client machine.



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

The installation of Field Level Security on the Laptop client machine is now complete.



## Additional Configurations

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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 Field Level Security 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 \\V3\ 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](http://www.c360.com/support)



## Licensing

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### **For fresh installation of c360 Field Level Security for Microsoft Dynamics CRM 3.0**

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 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

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### **Steps to uninstall c360 Field Level Security 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 Field Level Security 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.

### **Steps to uninstall c360 Field Level Security from the Laptop client machine**

1. On the Laptop client for Microsoft CRM where you installed the product, navigate to 'Control Panel' and open 'Add or Remove Programs'
2. Select c360 Field Level Security 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 Field Level Security 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.