



c360 Console Installation Guide

Microsoft Dynamics CRM 2011 compatible

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Overview and Notes

Overview

This document outlines the process for installing c360 Console dashboard cells for Microsoft Dynamics CRM 2011.

Microsoft CRM Compatibility

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

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

c360 Console for Microsoft Dynamics CRM 2011

The c360 Console allows Microsoft CRM users to add critical data to their personal and system dashboards. Console cells deliver **critical data** with **less clicks, fewer screens** and allow Microsoft CRM users to see the data that is relevant to them the way they want to see it. Since the cells are integrated into standard dashboard functionality, they allow users to combine CRM views, search cells, c360 products and CRM record data with standard CRM dashboard cells. The c360 Console cells allow users to mix the following types of content:

- Microsoft CRM Advanced Find queries/views
- c360 Products, if in use by the organization
 - c360 My/Summary
 - Quick Activity
 - c360 Relationship Explorer
 - Multi-field Search
- CRM record details (create a form for easy editing of key items in the Dashboard)
- Custom Search cells
- Associated entity lists (displays records linked to the actively selected CRM record)



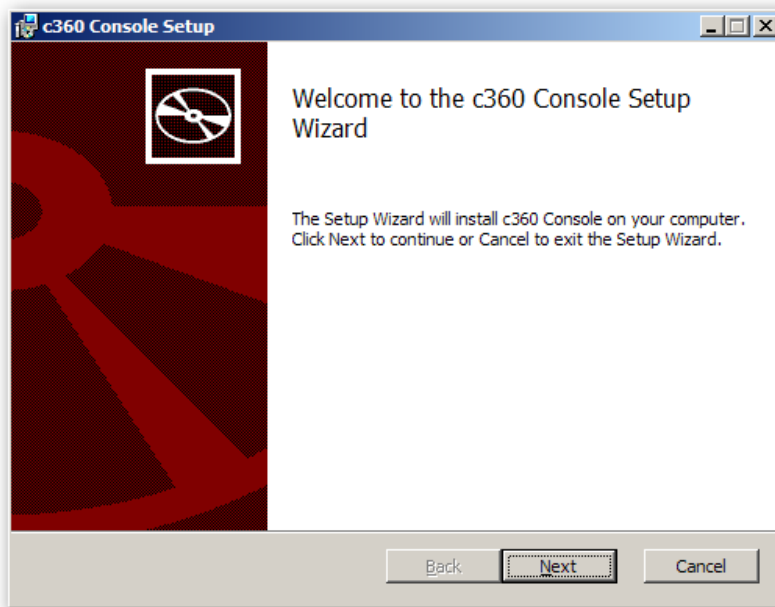
Installation Instructions

Requirements

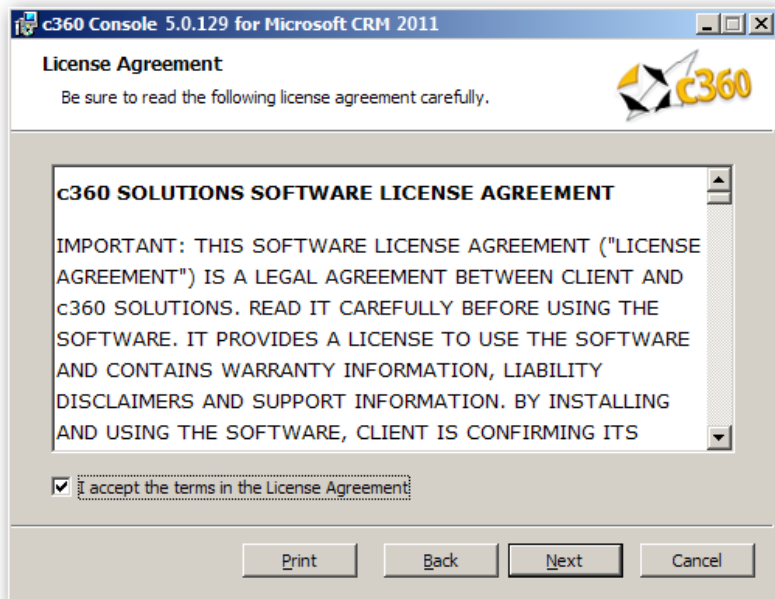
To install the product the installation application must be run on the CRM server by a user with Local Administrator and CRM Deployment Manager privileges. The user must also be a member of the CRM System Administrator role. The installation of c360 Console for Microsoft CRM 4.0 requires the c360 Console CRM2011.msi file which can be downloaded by visiting <http://www.c360.com/DownloadRegister.aspx>.

Steps to install c360 Console for Microsoft Dynamics CRM 2011

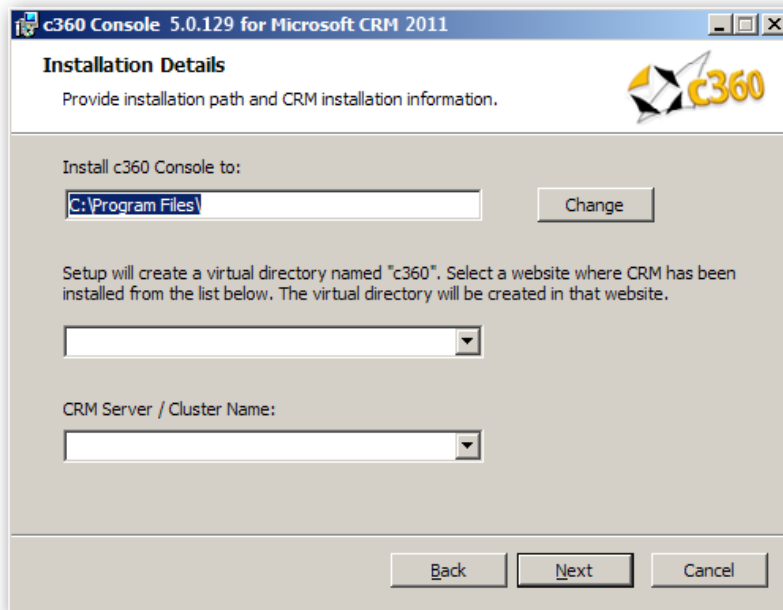
1. Extract the "c360 Console CRM2011.zip" file into a folder on the Microsoft CRM server machine.
2. Double click the 'c360 Console for Microsoft CRM2011.exe' file. You will see the following screens.



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



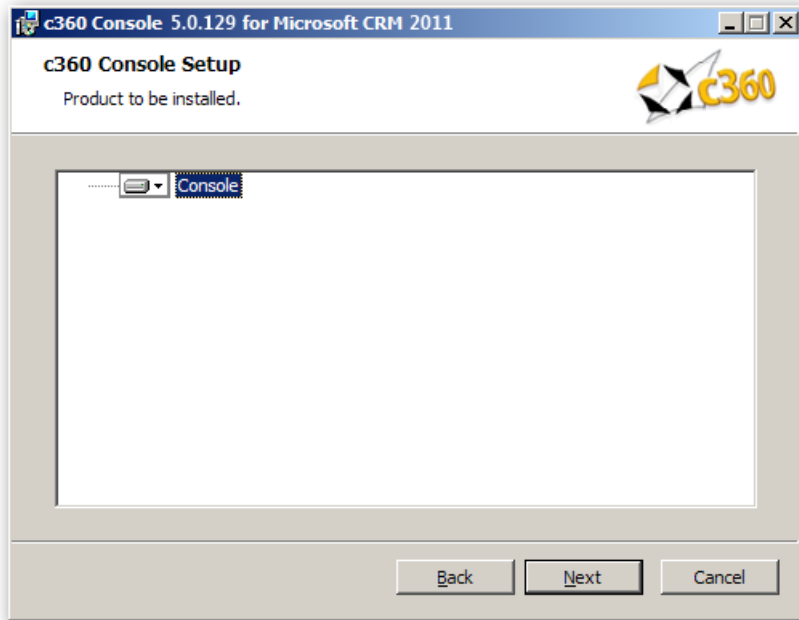
4. If you agree with the terms of the license agreement, select the option labeled 'I accept the terms in the license agreement' and click '**Next**'.



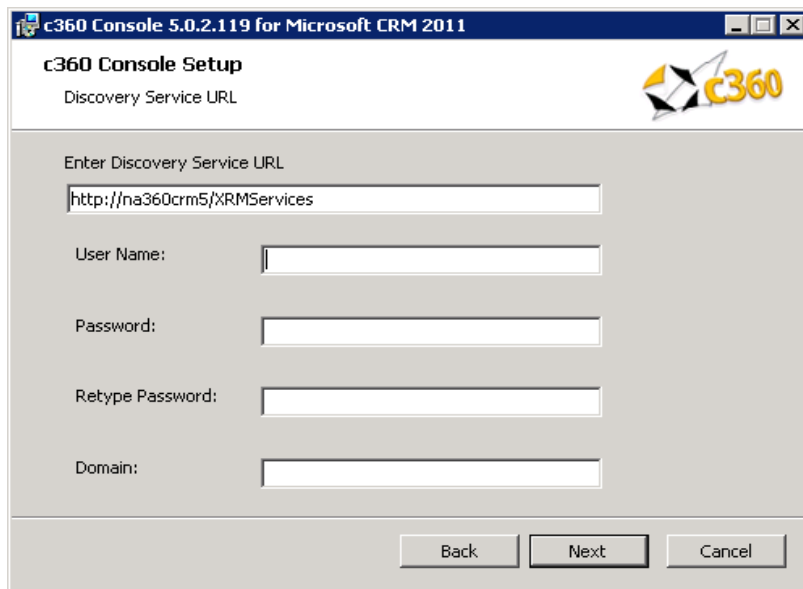
5. Accept the default entry for the installation path or modify. Select the CRM website and verify that the CRM Server / Cluster is correct. Click '**Next**'.

Notes:

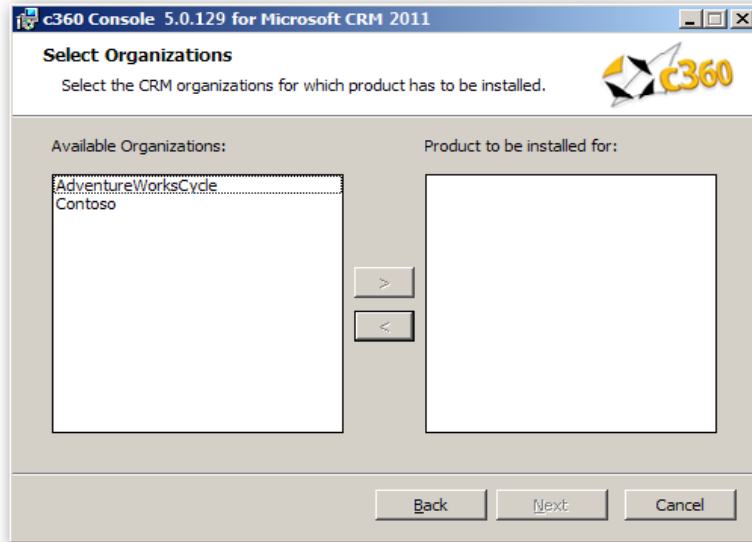
- CRM Server / Cluster Name: Name/ host header/ IP address of the server that is hosting the Microsoft CRM website.
- If any c360 products have previously been installed, this screen will not appear. All configuration settings from the previous install(s) will be used.
- If this is an IFD environment,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



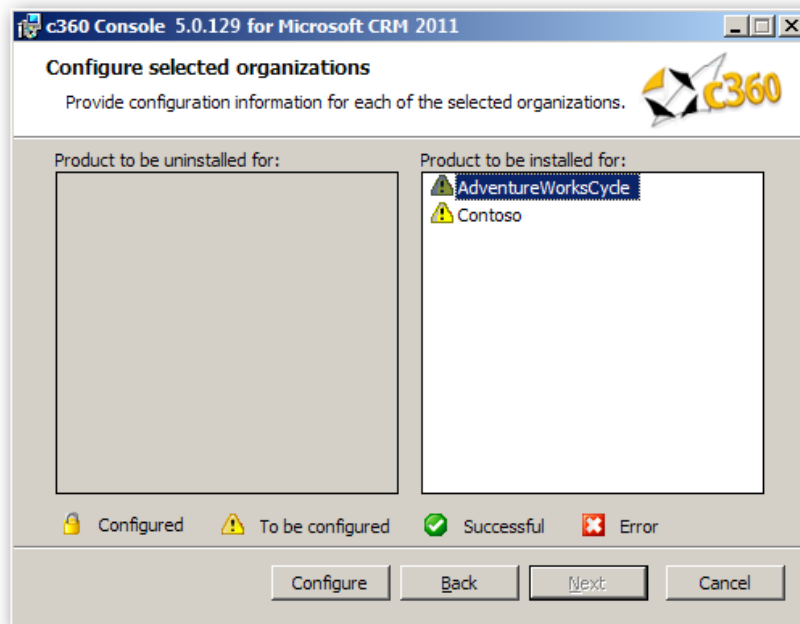
6. Click **'Next'**.



7. 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.



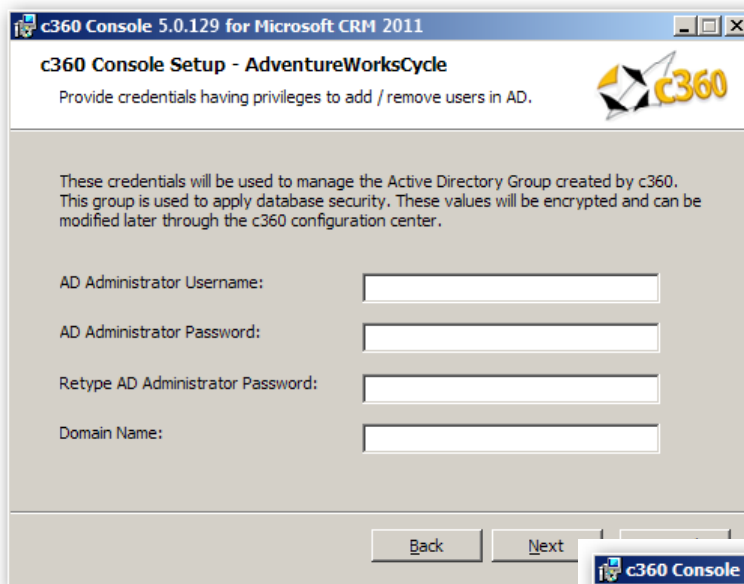
8. Select the Organization(s) for which the product is to be installed. Then click **'Next'**.



9. 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.

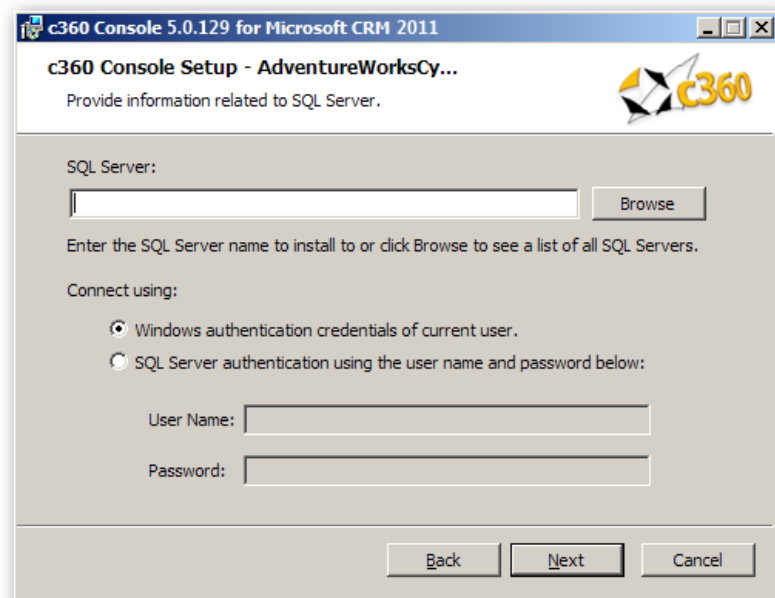


10. Enter the name, password and domain for the user who has privileges to create groups and add users to groups in Active Directory.

Click **'Next'**.

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'**.

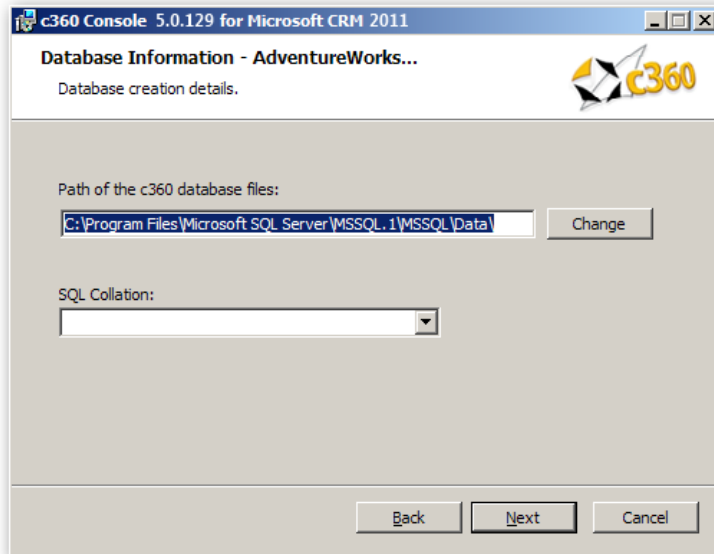


Note:

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.

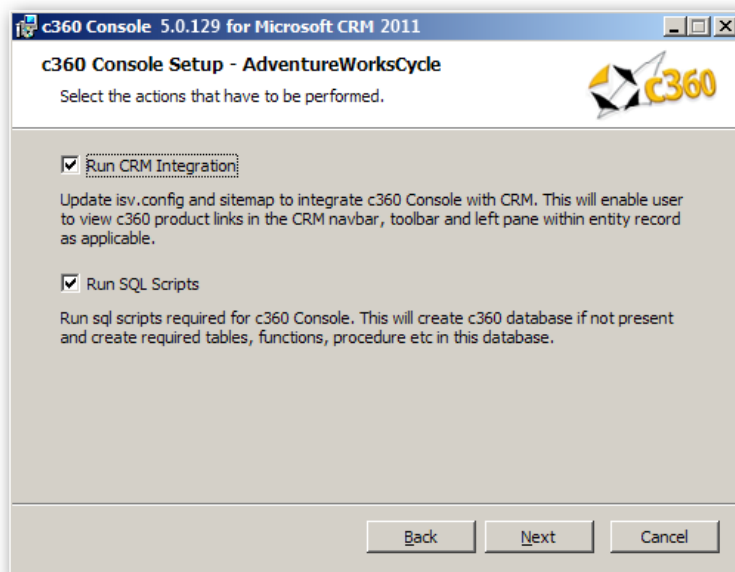


13. Select the path to install the database files.

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

Note:

- This screen will not show 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 have to be performed manually. Please contact support@c360.com for assistance. If installing on a load-balanced environment, please see 'Additional Configurations'.

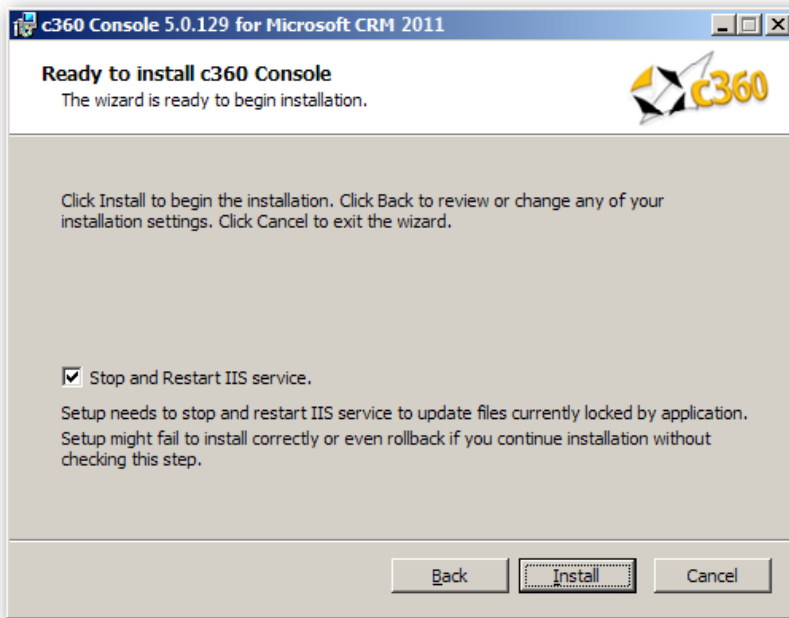
The screenshot shows a window titled "c360 Console 5.0.1.431 for Microsoft CRM 2011". The main heading is "IFD related information" with a sub-heading "Provide SPLA credential information to connect to the CRM discovery service." Below this, a paragraph explains that these credentials will be used for the CRM Discovery service and can be updated later. There are four input fields: "User Name:" with "c360administrator", "Password:" with masked characters, "Retype Password:" with masked characters, and "Domain:" with "c360". At the bottom are "Back", "Next", and "Cancel" buttons.

16. Enter SPLA credentials for IFD mode. If c360 Console ever needs to operate in IFD mode, these credentials will be used to connect to the CRM discovery service.

Click **Next**.

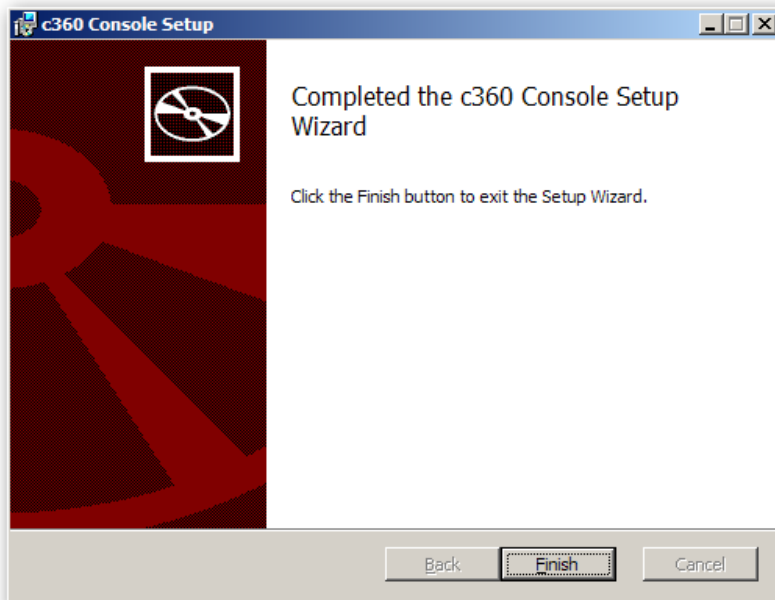
The screenshot shows a window titled "c360 Console 5.0.129 for Microsoft CRM 2011". The main heading is "Configure selected organizations" with a sub-heading "Provide configuration information for each of the selected organizations." There are two columns: "Product to be uninstalled for:" (empty) and "Product to be installed for:" containing "AdventureWorksCycle" and "Contoso", both with checked boxes. At the bottom, there is a status bar with icons for "Configured", "To be configured", "Successful", and "Error". Below the status bar are "Configure", "Back", "Next", and "Cancel" buttons.

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



18. Uncheck the IISReset option if an IISReset is undesirable at this time. Click **'Install'** to install c360 Console 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.



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



Created On : 1/18/201

Product : c360 Console

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 successfully
Update c360 Config	Successful	
Update Config Files	Successful	Successfully updated the config file.
Crm Integration	Successful	Successfully performed the Crm integration.
c360ADManagement	Successful	
SqlInterface	Successful	

20. 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 Console 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 and Run 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 Console, 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 Console

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

If c360 Console for CRM 4.0 is already installed with valid licenses, those licenses will be valid for Console for CRM 2011. If you no longer have a valid license, or if this is a fresh installation of c360 Console 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 where SQL is on a different Box

1. When SQL Server is on a different Box , install the components where CRM is installed
 1. Microsoft SQL Server 2008 Management Objects X86 (32 Bit)
 2. Microsoft SQL Server System CLR Types X86 (32 Bit)

These Components can be downloaded from the link mentioned
<http://www.microsoft.com/downloads/en/details.aspx?FamilyId=C6C3E9EF-BA29-4A43-8D69-A2BED18FE73C&displaylang=en>

This will be applicable for 5.0.1 Release.



Installing additional organizations _____

Steps to install additional organizations for c360 Console for Microsoft Dynamics CRM 2011

1. Re-run the 'c360 Console for Microsoft CRM2011.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 Console for Microsoft Dynamics CRM 2011

To uninstall all pieces of c360 Console, 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 Console.

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 Console 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 Console .exe

1. On the server, double click the c360 Console 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 Console

Steps to uninstall an organization for c360 Console for Microsoft Dynamics CRM 2011

1. Re-run the 'c360 Console for Microsoft 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.
5. Note: multiple organizations can be uninstalled at once



International Languages _____

c360 Console 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.