Installation and Configuration Manual

Organization Structure

for Microsoft Dynamics CRM 2011

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Table of Contents

What's in this manual

This manual provides guidelines for installing and configuring the Organization Structure add-on for Microsoft Dynamics CRM 2011. It specifies system requirements, contains step-by-step installation guide, gives tips on troubleshooting and describes post installation configuration procedures.

The manual is divided into the following sections:

➢ **Introduction**

In this chapter you can find basic information about Organization Structure, its licensing and compatibility with Microsoft Dynamics CRM.

➢ **Installation**

In this chapter you can find information about system requirements, how to install and uninstall Organization Structure. It also contains information about post installation configuration procedures.

Introduction

This section contains a list of the supported databases and operating environments for Organization Structure module, as well as the recommended system requirements for servers and client computers.

Organization Structure Overview

Organization Structure functionality allows you to display customer organization in a graphic tree view. Company Tree presents selected customer Organization with its all Parent and Children records. The highest level in the tree view is the top level in Organization. Number of displayed records depends on user security role. You can include contacts for each account displayed in organization tree as well as inactive records.

Written in Silverlight it seamlessly integrates with the latest version of the Microsoft Dynamics CRM 2011. Packaged as managed solution is fully compatible with all types of the deployment (on-premises, live). No client or server side installation needed. This product is licensed per organization.

Product Licensing

This product is licensed per user. You may purchase exactly as many licenses as you need regardless the number of active Microsoft CRM licenses you have. Although if you purchase less licenses then the number of CRM licenses you currently have, you will have to associate each license with the user. What it means in practice is that only named users will be able to use the product. If you need more licenses you can always purchase any number of additional licenses at any time.

Evaluation Licenses

You can request a 14 day evaluation license that will allow testing our product on your production company. Visit our web site at http://www.dynamics-pros.com/Products/RequestEvaluationLicenses/tabid/252/Default.aspx and fill a "Request Evaluation Licenses". You will need to provide your CRM organization name in order to receive a valid registration key by email.

Compatibility

Organization Structure is compatible with Microsoft Dynamics CRM version 2011, and all installation types (on-premises, live, hosted).

Installation Instruction

In this chapter you can find information about system requirements, how to install and uninstall Organization Structure on your Microsoft Dynamics CRM server. It also contains information about post installation configuration procedures.

System Requirements

This chapter contains a list of the supported databases and operating systems, as well as components that must be installed on a server before you can start Organization Structure installation process.

➢ **Supported client operating systems**

Windows 8
Windows 7
Windows Vista
Microsoft Windows XP SP3

➢ **Supported browsers***

Internet Explorer 8.0 or newer (Windows)
Latest version of Chrome (Windows)
Latest version of Firefox (Windows)
Latest version of Safari (Mac OSX)

*) Make sure you that have disabled popup blocker in your browser for the CRM domain (please refer to your browser documentation).

➢ **Required components**

Silverlight 4.0 (it should install automatically, but can be also installed manually from http://www.microsoft.com/getsilverlight).

Installation

To use Organization Structure no client or server side installation is needed. Product is packaged as managed solution so you only need to import two compressed (zip) files into your Dynamics CRM deployment. You must have administrator privileges in the Dynamics CRM in order to install this solution.

1. Obtain required files

    a. Go to **http://downloads.dynamics-pros.com**

    b. Click on "Download trial versions of our products link" (login will be required) and download the latest version of the Organization Structure 2011 (OrgStructure_2011.zip).

    c. Unzip OrgStructure_2011.zip. It contains two more zip files (these are the files that you will be importing into Dynamics CRM 2011):

        i. Shared_5.0.xxxx.x.zip (import first)

        ii. OrgStructure_5.0.xxxxx.x.zip (import second)

2. Import managed solution

    a. Login to your Dynamics CRM and go to Solutions in the Settings Area. Click "Import" option in the toolbar.
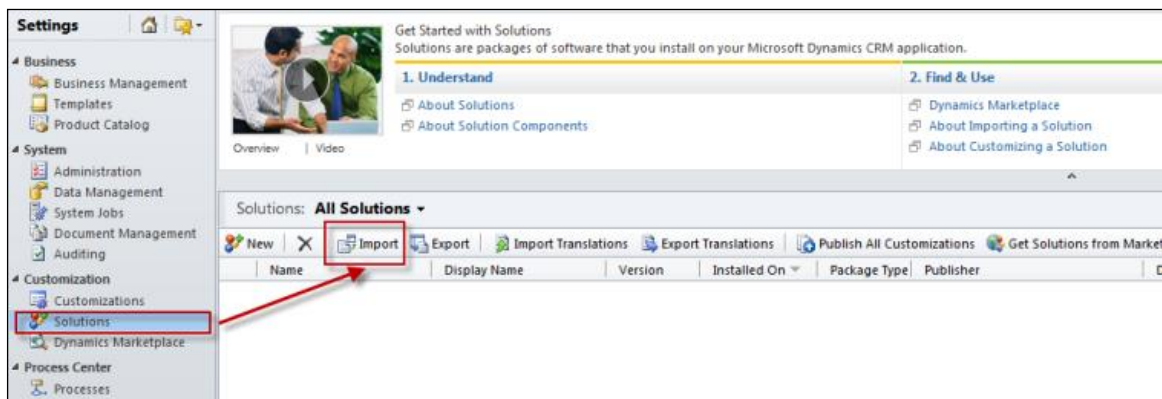
b. In the Select Solution Package screen select the
Shared_5.xxxxx.x.zip file you have downloaded in previous step.
Click "Next".
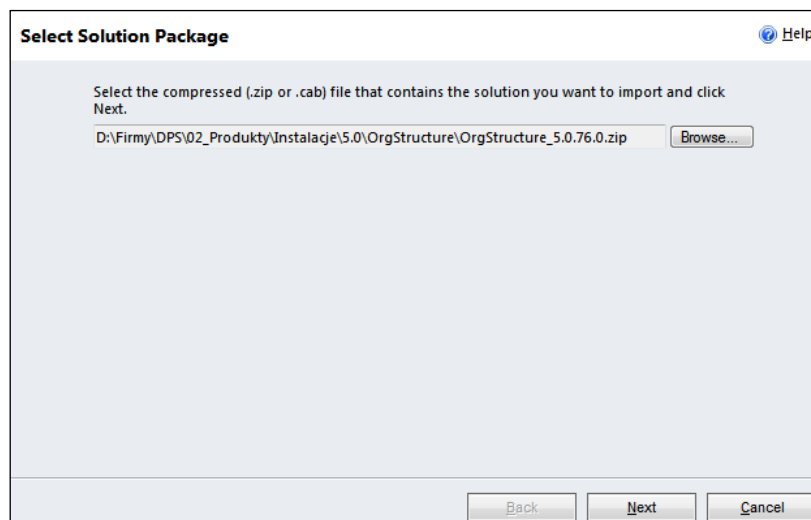
c. Importing Solution screen will open and progress can be monitored. It
may take some time to complete the import.
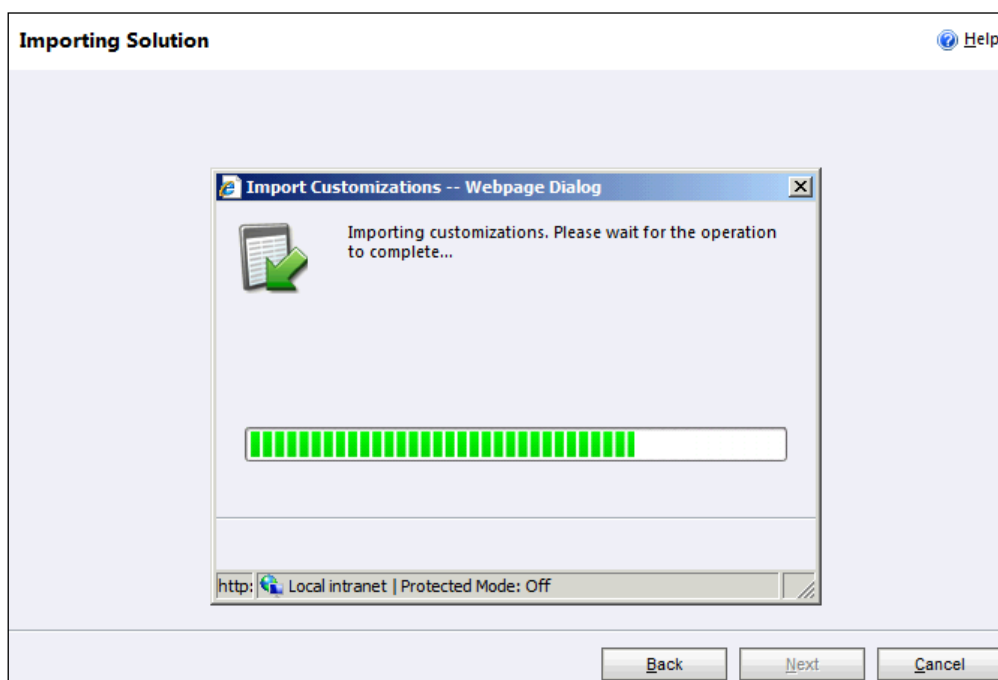
d. When system finishes review that process was completed successfully. At this point you can also download a log fie.
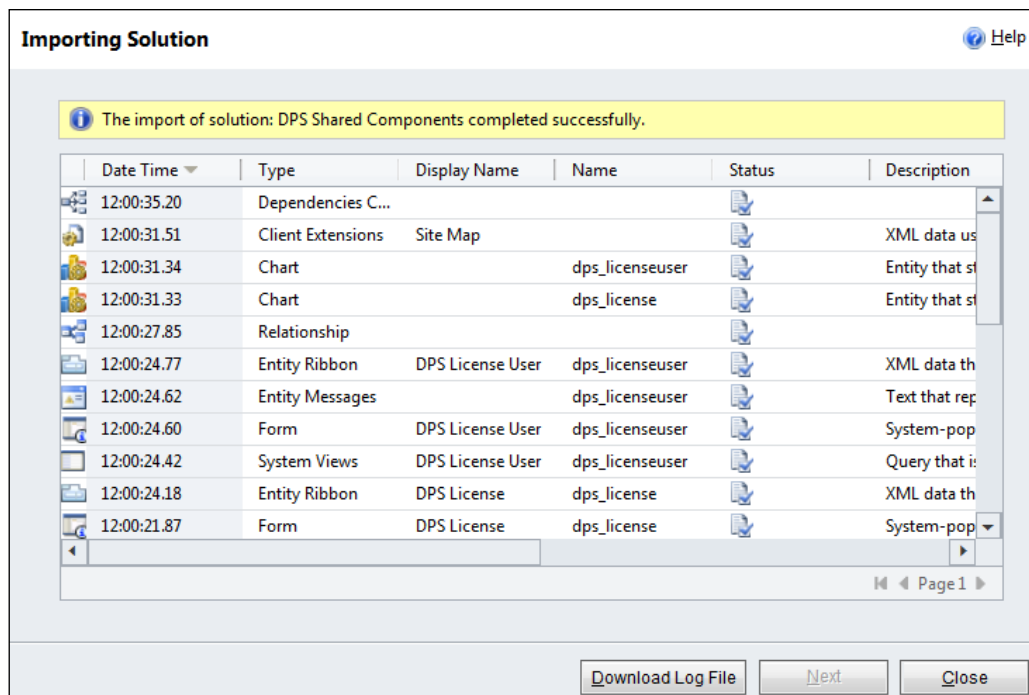
e. Repeat above steps and import **OrgStructure_5.xxxxx.x.zip** file.

f. After that step you should have 2 managed solutions from Dynamics Professional Solutions Ltd publisher.

Organization Structure 2011
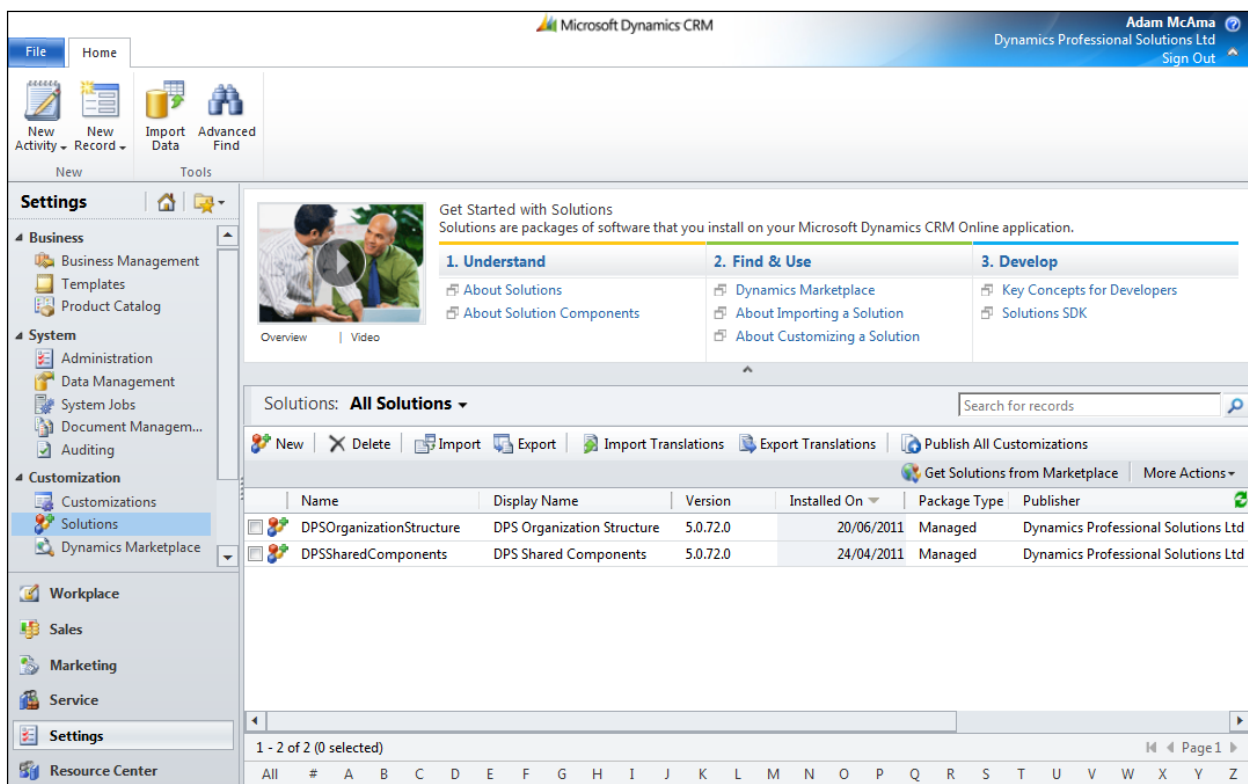
Post Installation Configuration

If you have purchased Organization Structure product follow below steps to register your product.

1. **Login to Dynamics CRM and access Settings Area.**

   Select DPS Licenses option from the Extensions section.
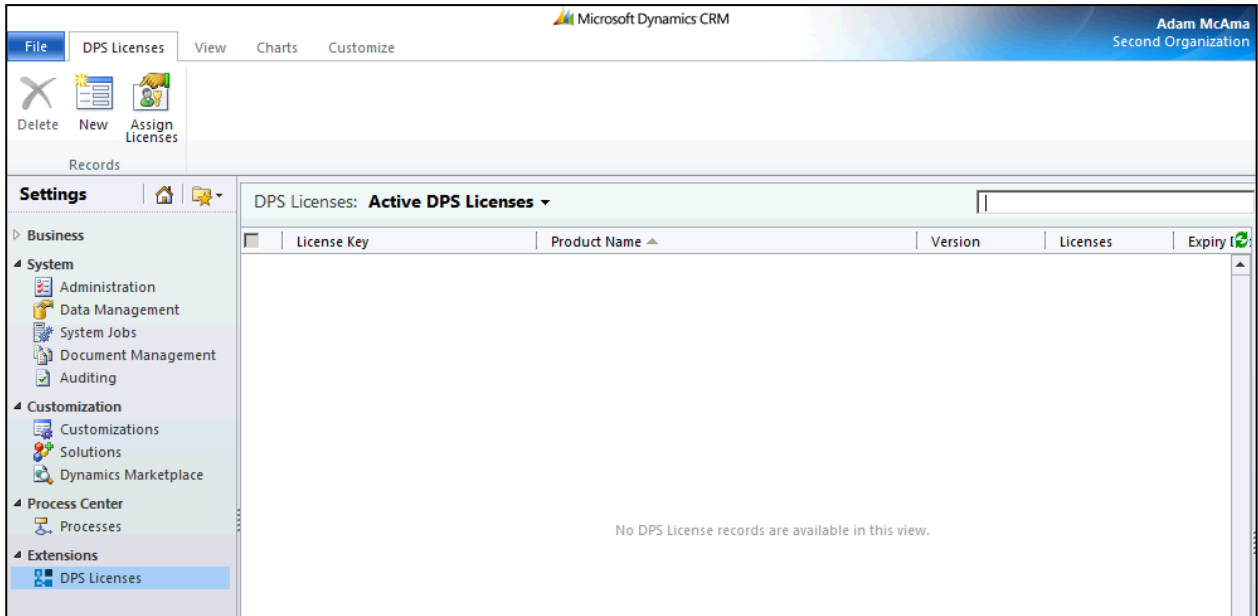
2. **Select New from the Ribbon to add your license.**

   In the Add License screen verify that your Organization Name is displayed correctly and enter the license key that was emailed to you.

3. Verify Licences

After entering a valid set of license keys verify information displayed in "Licenses Screen". You should see version and licence number for each product that you own. It may be more than one line for a single product.
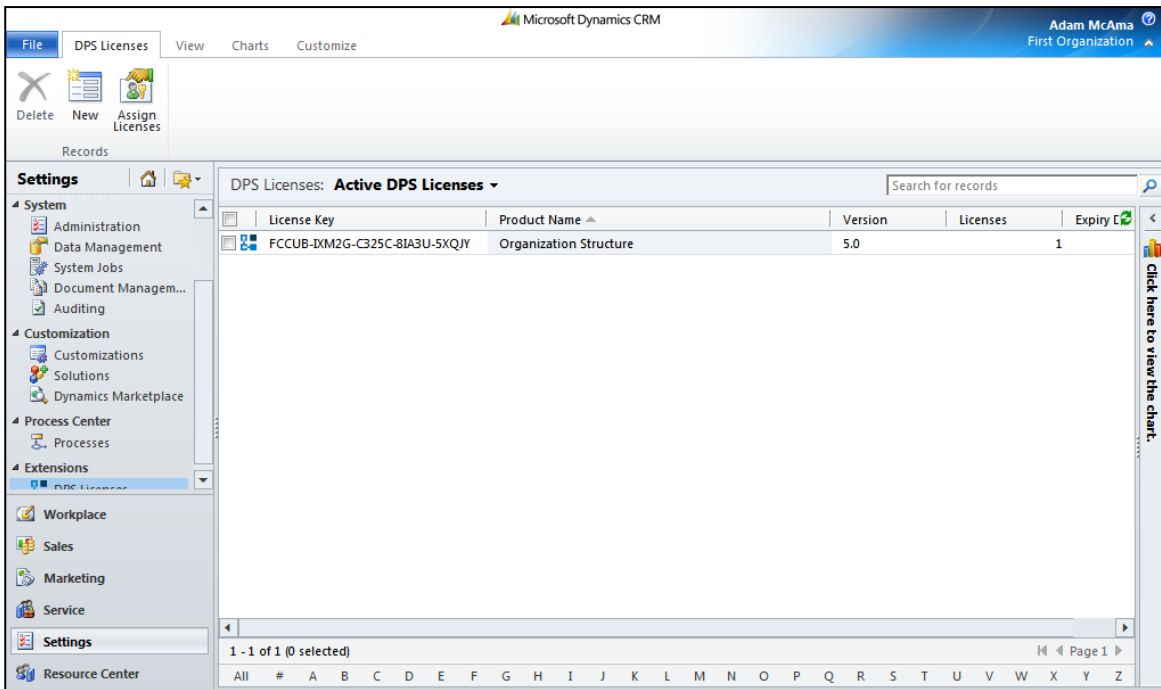
4. Assign Licenses to users

There is no need to assign Licenses to individual users if number of licences that you have purchased is the same or greater than number of active users in Dynamics CRM.
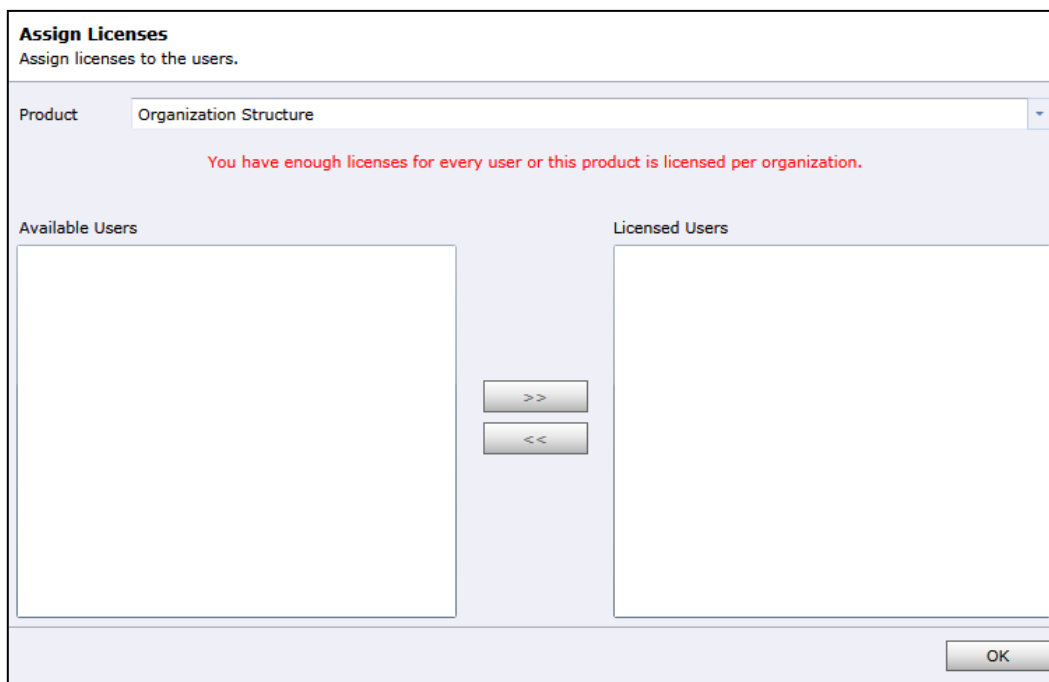
If number of licences that you have purchased is less than number of active users use "Assign Licenses" screen to assign Licenses to individual users.
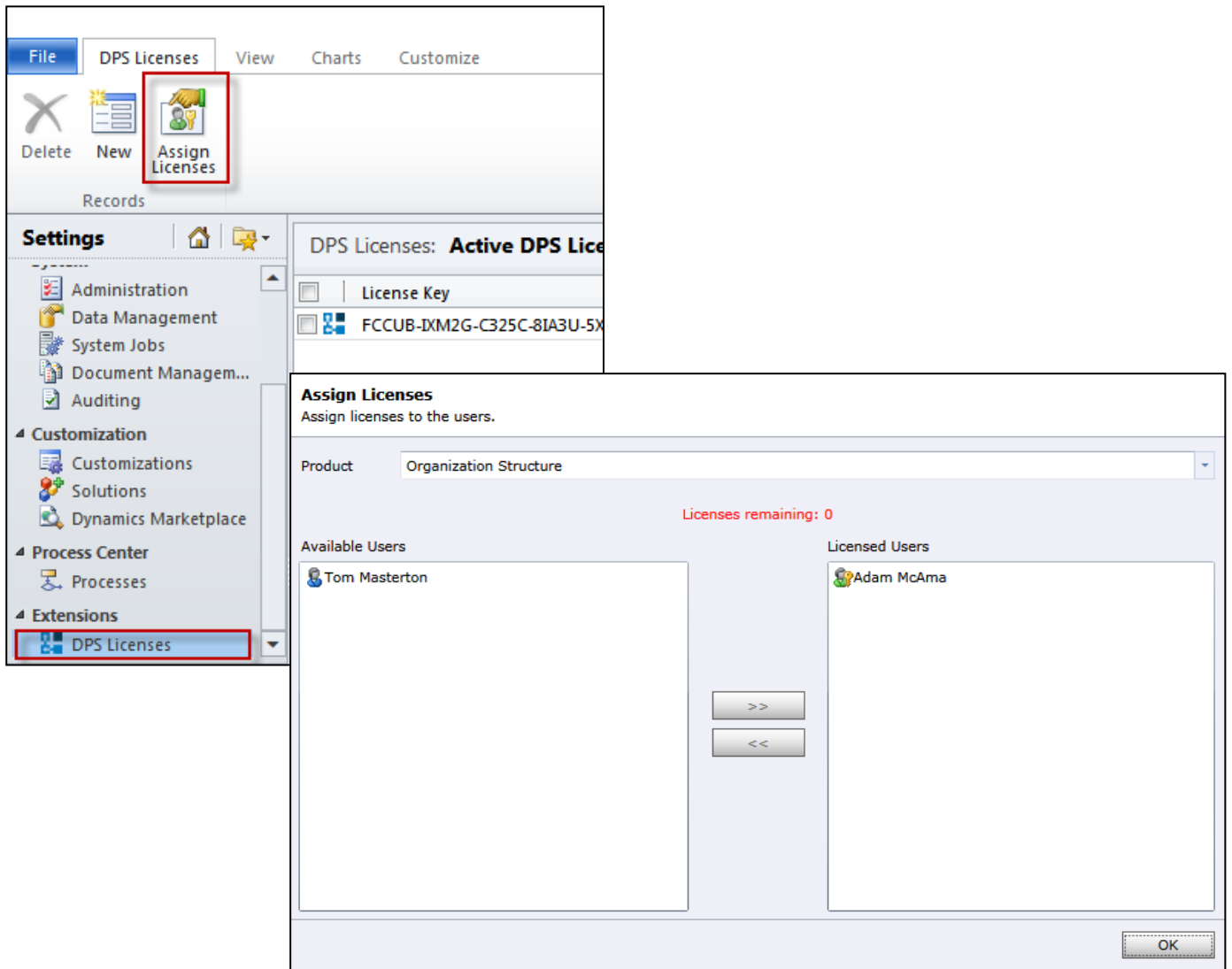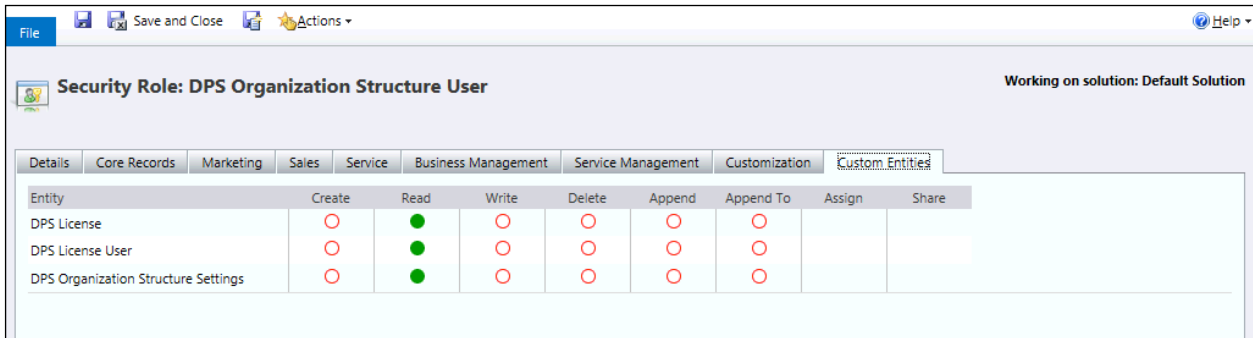
Permissions

After installing Organization Structure solution two new security roles will be available in your Organization.

- DPS Organization Structure Administrator

- DPS Organization Structure User

Assign appropriate roles to your Dynamics CRM users or amend their existing security roles by adding privileges included in ours.

1. Login to Dynamics CRM and access Settings Area.

Select Solutions from Customization Section. Open DPS Organization Structure solution.
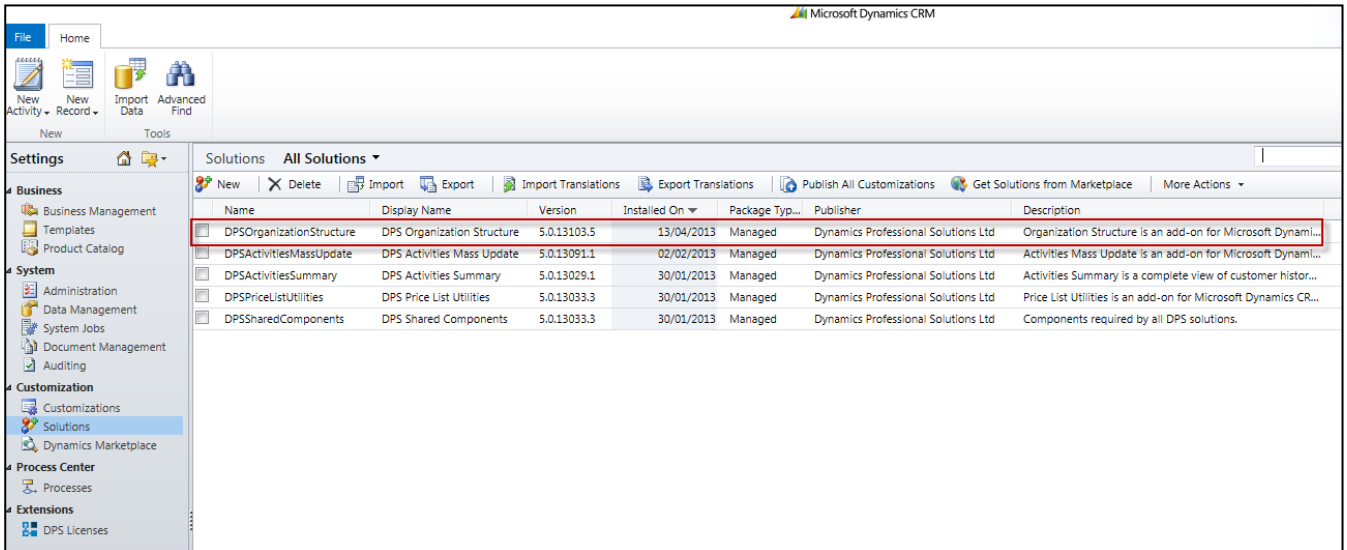

2. Setup fields for Account and Contact entity

In Solution: DPS Organization Structure screen select Configuration. You can setup up to 3 extra fields for Account and Contact entity that can be included in Organization Tree.

Account Name field cannot be removed for the Account entity and similarly Full Name for the Contact entity.

Format field specifies how selected fields should be displayed. Generally there are 4 tokens %1, %2, %3 and %4 which corresponds to the selected field. For example for the below screenshot:

%1	Account Name
%2	Account Number
%3	Region
%4	Not used (empty)

You can specify more than one format. Alternate formats are separated by | for example: %1|%1 - %2|%1 - %2 - %3. Best matching format will be selected automatically. The selection will be made based on the presence of a field value. If in this example only Account Name is not empty then first format will be used (%1), but if both Account Name and Account Number are present then second alternative will be used (%1 - %2). And similarly if all values are present then third format applies (%1 - %2 - %3). If there are more than one formats matching then the first match will be used.
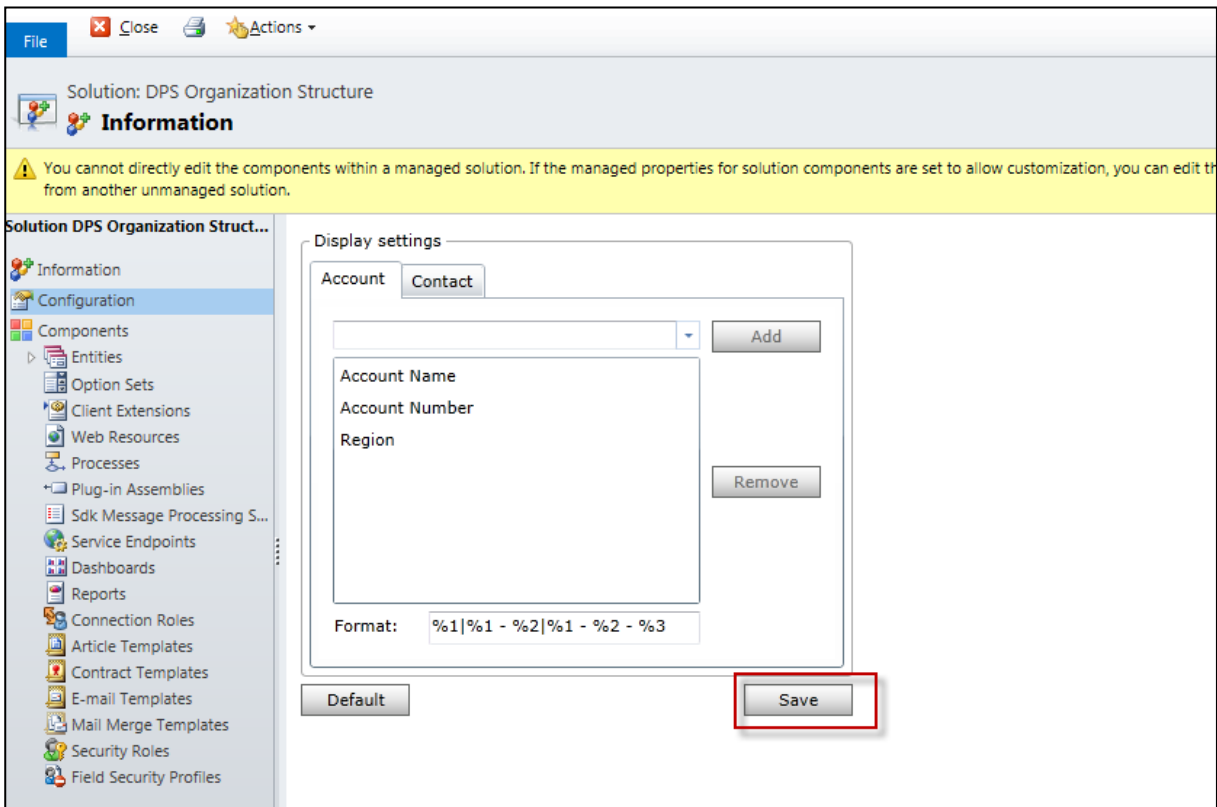
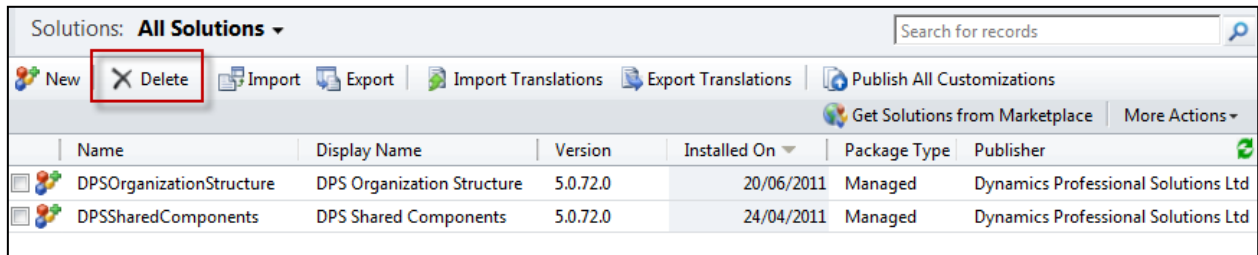To save your configuration press "Save" button.
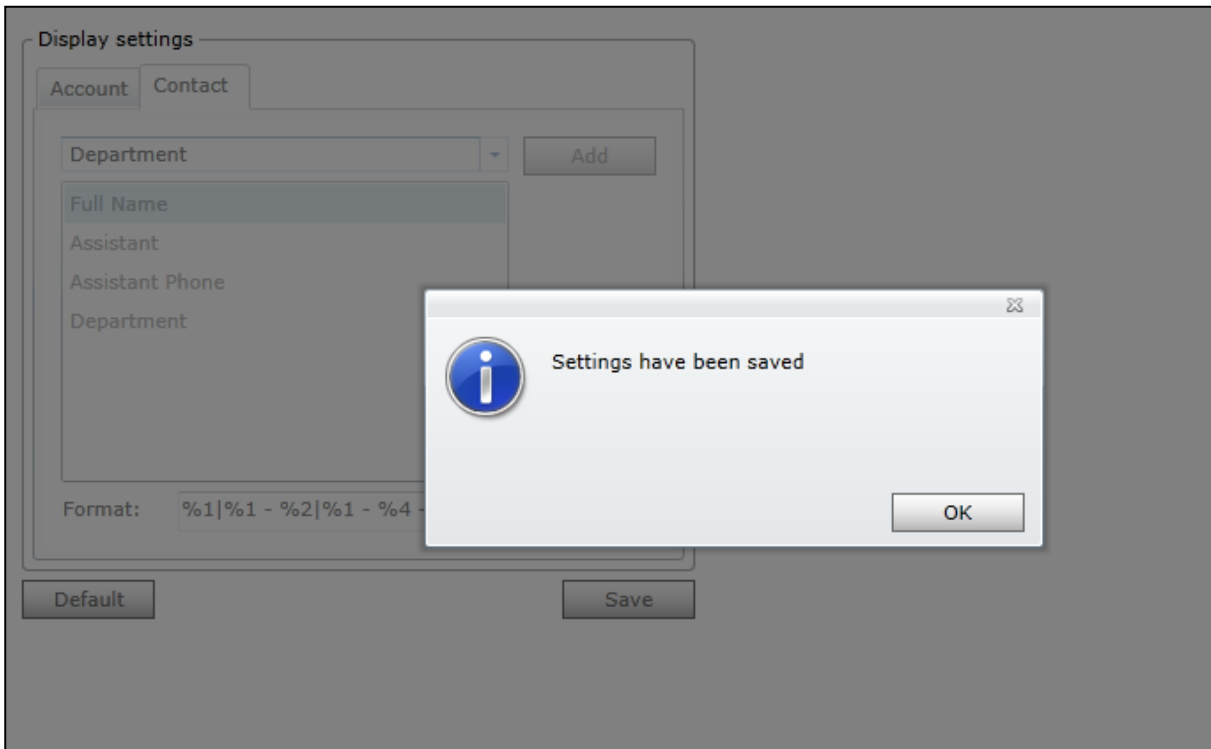
Uninstall

1. **Login to Dynamics CRM and go to the Solutions in Settings Area.**

   Mark the solution you wish to uninstall and click delete button. Note, that you will have to delete DPS Organization Structure first. You will not be able to delete DPS Shared Components if there is at least one DPS product still installed.

2. **Confirm Deletion**

Confirm deletion screen will open. Click OK button to delete the solution.
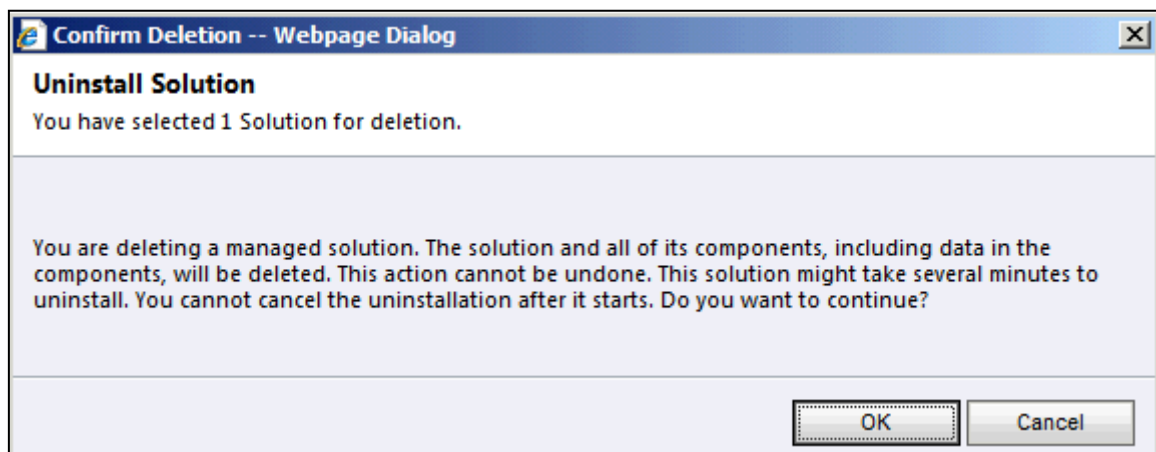
Support

If you have any questions or problem with our products contact our support team. Submit your question using New Support Request Form on our Web page. A member of our support team will get in touch with you as soon as possible.

<p style="text-align:center;">http://support.dynamics-pros.com</p>

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