



Organization Structure

For Dynamics CRM 2013



Installation Guide

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Table Of Contents

| | |
|---------------------------------------|----|
| Table Of Contents | 4 |
| What's In This Manual..... | 5 |
| Introduction | 6 |
| Organization Structure Overview | 6 |
| Product Licensing | 6 |
| Evaluation Licenses..... | 6 |
| Compatibility | 6 |
| Installation Instruction | 7 |
| System Requirements..... | 7 |
| Installation..... | 8 |
| Post Installation Configuration | 11 |
| Permissions | 14 |
| Uninstall..... | 15 |
| Support..... | 16 |

What's In This Manual

This manual provides guidelines for installing and configuring the Organization Structure add-on for Microsoft Dynamics CRM 2013. 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 Dynamics CRM.

➤ **Installation**

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.

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 2013. 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. This means that you should buy as many licenses as number of users who you want to use this product. Each license will have to be associated with a user account (if you buy fewer licenses than you have active users in your CRM organization). If you need more licenses you can always buy 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 <https://www.dynamics-pros.com/evaluation-license-request/> 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 2013, and all installation types (on-premises live, etc).

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 (64-bit and 32-bit versions)
Windows 7 (64-bit and 32-bit versions)
Windows Vista SP2 (6-bit and 32-bit versions)

➤ **Supported browsers***

Internet Explorer 10 (Windows)
Internet Explorer 9 (Windows)
Internet Explorer 8 (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 5.0 (it should install automatically, but can be also installed manually from <http://www.microsoft.com/getsilverlight>).

Installation

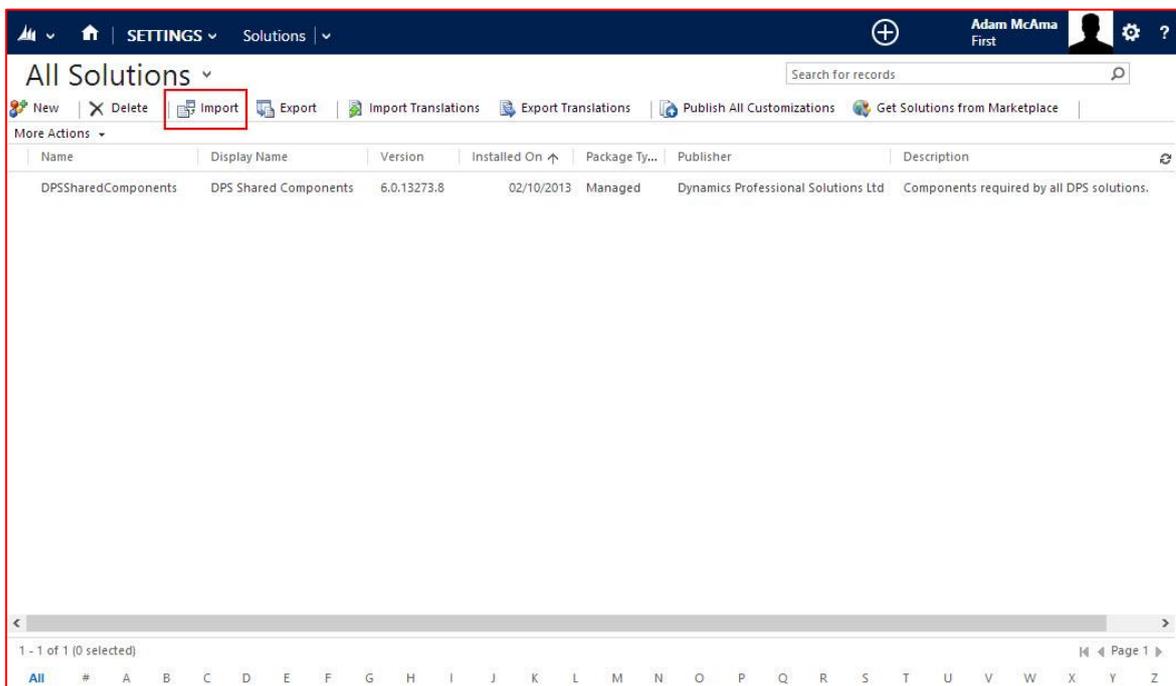
To use Organization Structure no client or server side installation is needed. Product is packaged as managed solution so you only need to import two compressed (zip) files into your Dynamics CRM deployment. You must have administrator privileges in the Dynamics CRM in order to install this solution.

1. Obtain required files

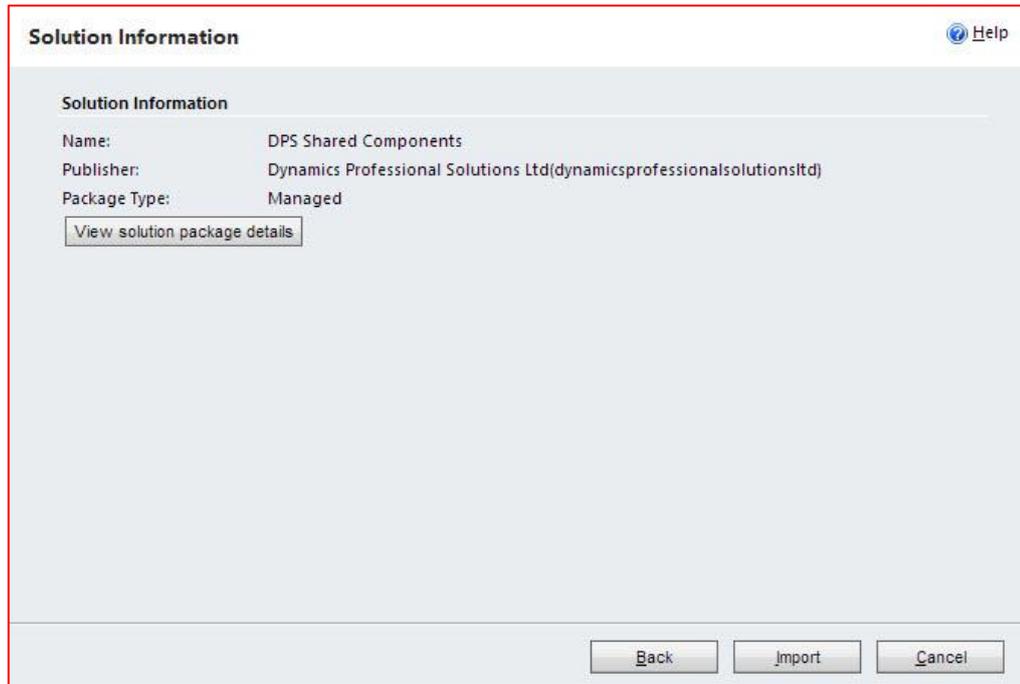
- a. Go to <http://downloads.dynamics-pros.com>
- b. Click on “Download trial versions of our products link” (login will be required) and download the latest version of the Organization Structure 2013 (OrgStructure_2013.zip).
- c. Unzip OrgStructure_2013.zip. It contains two more zip files (these are the files that you will be importing into Dynamics CRM 2013):
 - i. Shared_6.0.xxxx.x.zip (import first)
 - ii. OrgStructure_6.0.xxxxx.x.zip (import second)

2. Import managed solution

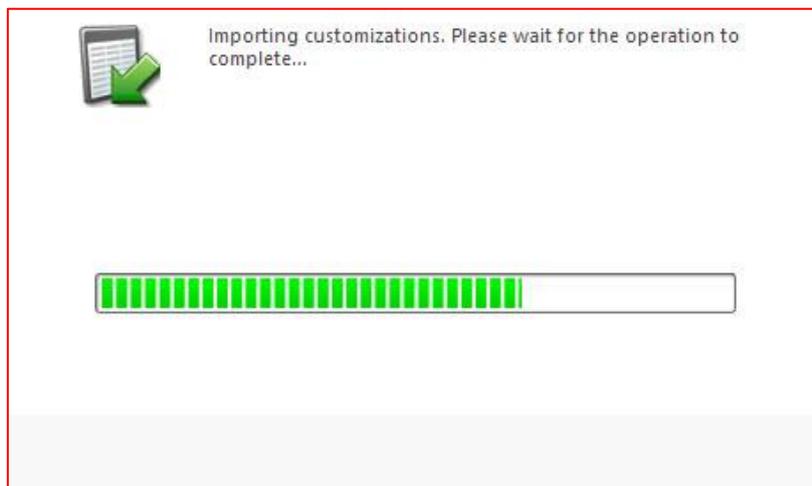
- a. Login to your Dynamics CRM and go to Solutions in the Settings Area. Click “Import” option in the toolbar.



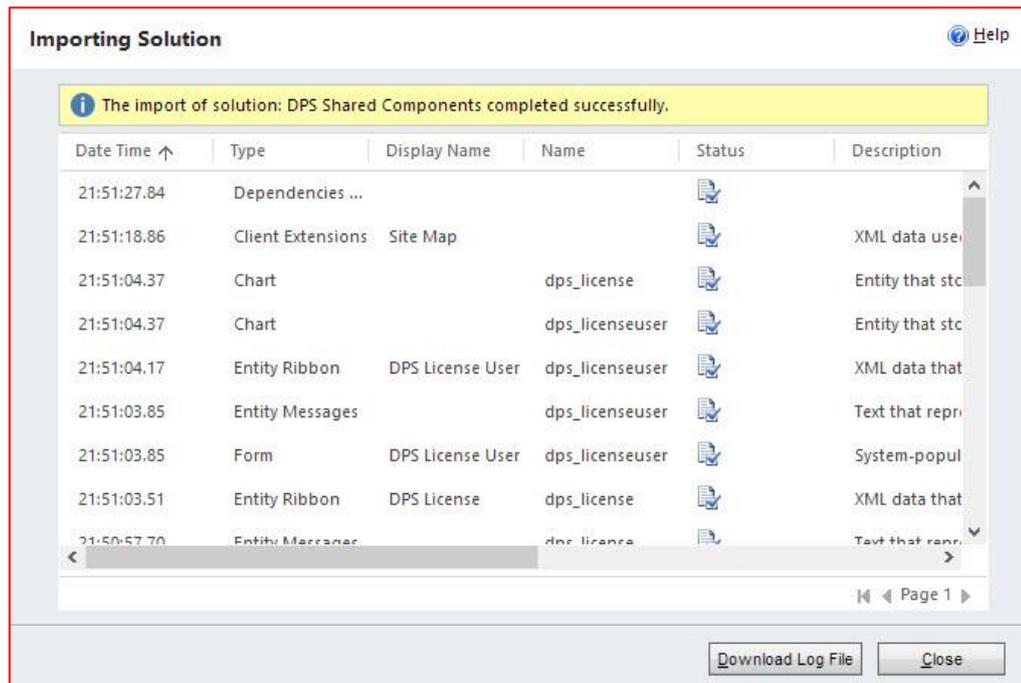
- b. In the Select Solution Package screen select the **Shared_6.0.xxxx.x.zip** file you have downloaded in the previous step. Click “Next”.



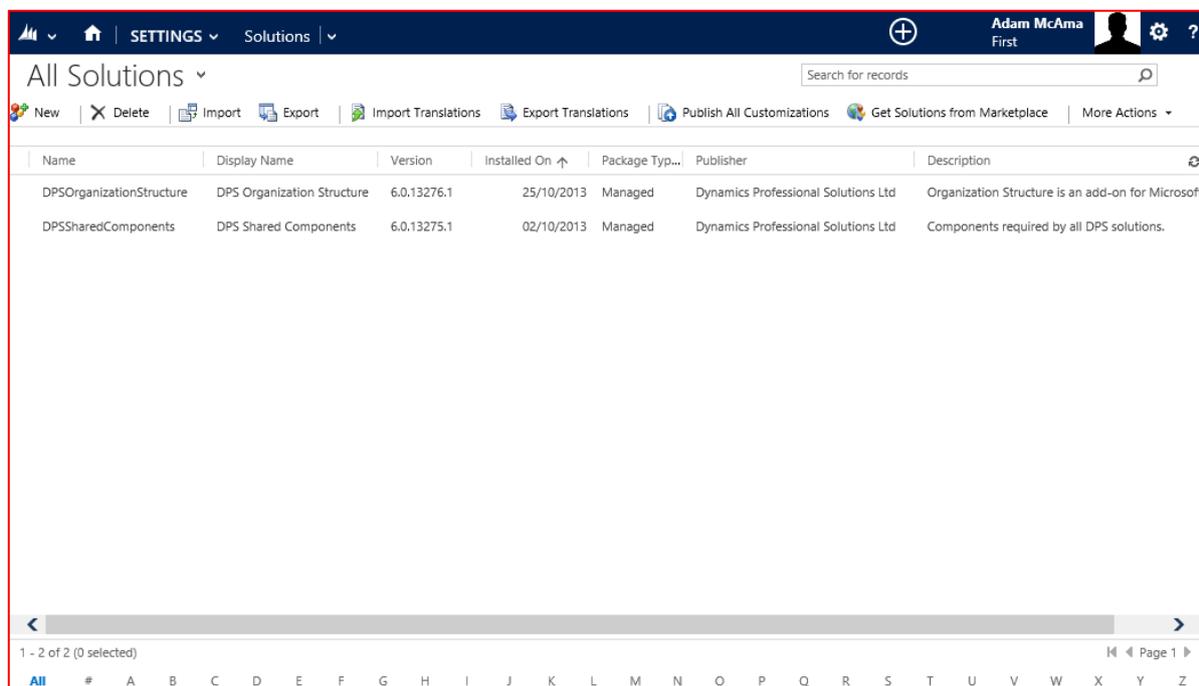
- c. Importing Solution screen will open and progress can be monitored. It may take some time to complete the import.



- d. When system finishes review that process was completed successfully. At this point you can also download a log file.



- e. Repeat above steps and import **OrgStructure_6.0.xxxxx.x.zip** file.
- f. After that step you should have two managed solutions from Dynamics Professional Solutions Ltd publisher.

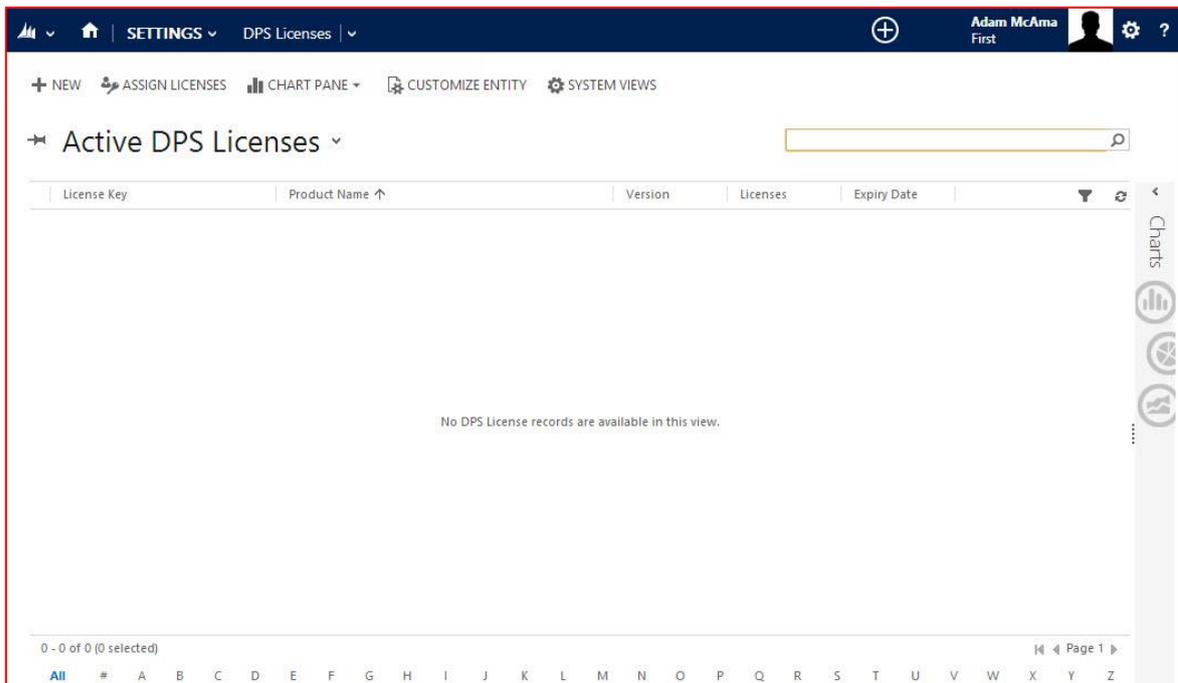


Post Installation Configuration

If you have purchased Organization Structure product follow below steps to register your product. Follow the same steps to evaluate our product.

1. Login to Dynamics CRM and access Settings Area.

Select DPS Licenses option from the Extensions section.



2. Select New from Command Bar to add Dynamics Professional License.

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

Add License
Enter your DPS license key below.

| | |
|-------------------|--|
| Organization Name | <input type="text" value="First"/> |
| License Key* | <input type="text" value="52LGG-SY3UX-UYFHM-65SU9-FI97X"/> |

6.0.13273.8

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.

| License Key | Product Name | Version | Licenses | Expiry Date |
|-------------------------------|------------------------|---------|----------|-------------|
| A4C99-KSJCY-MI8JU-XA5M3-WTMZ7 | Organization Structure | 6.0 | 5 | 09/11/2013 |

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.

Assign Licenses
Assign licenses to the users.

Product: Organization Structure

You have enough licenses for every user or this product is licensed per organization.

Available Users

Licensed Users

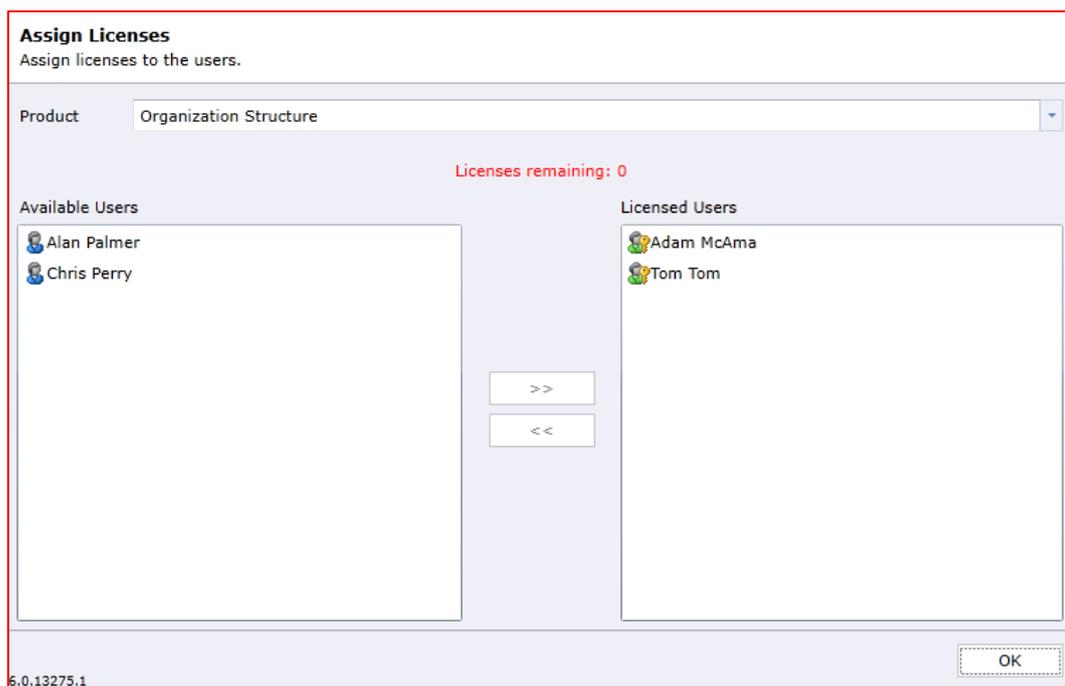
>>

<<

OK

6.0.13275.1

If number of licences that you have purchased is less than number of active users use “Assign Licenses” from Command Bar 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.

File Save and Close Actions Help

Security Role: DPS Organization Structure Administrator Working on solution: Default Solution

Details Core Records Marketing Sales Service Business Management Service Management Customization Custom Entities

| Entity | Create | Read | Write | Delete | Append | Append To | Assign | Share |
|-------------------------------------|--------|------|-------|--------|--------|-----------|--------|-------|
| DPS License | ● | ● | ● | ● | ● | ● | | |
| DPS License User | ● | ● | ● | ● | ● | ● | | |
| DPS Organization Structure Settings | ● | ● | ● | ● | ● | ● | | |
| Filter | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| Post Configuration | ○ | ○ | ○ | ○ | ○ | ○ | | |
| Post Rule Configuration | ○ | ○ | ○ | ○ | ○ | ○ | | |
| Profile Album | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| Wall View | ○ | ○ | ○ | ○ | ○ | ○ | | |

File Save and Close Actions Help

Security Role: DPS Organization Structure User Working on solution: Default Solution

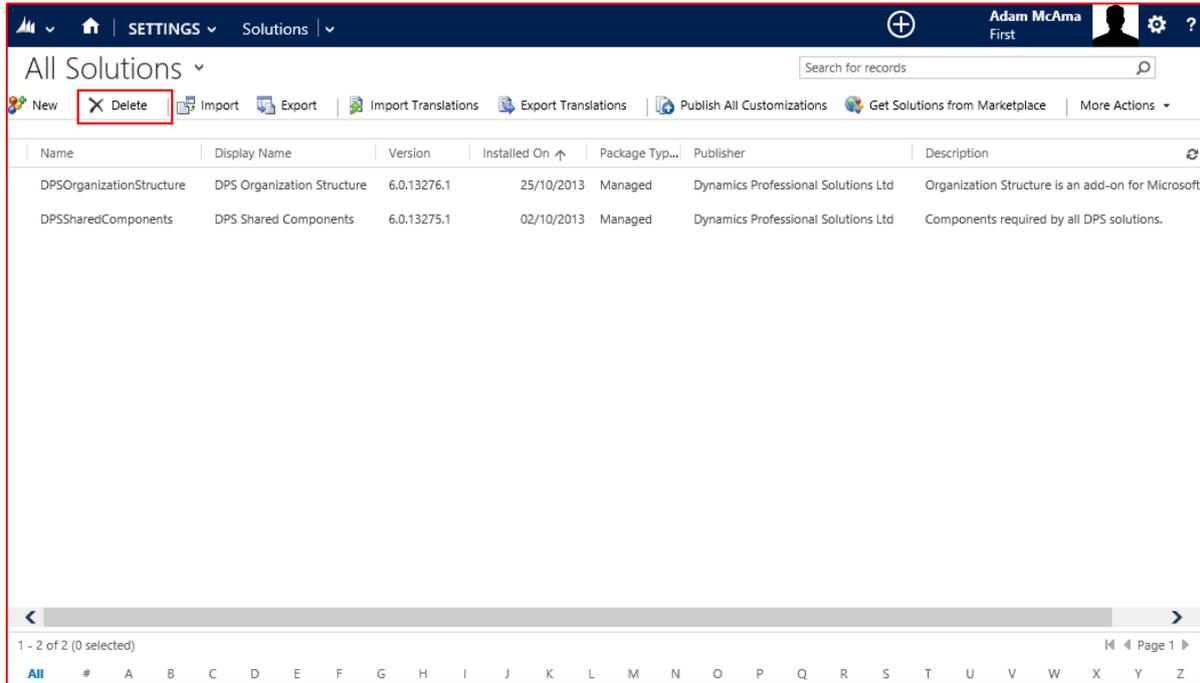
Details Core Records Marketing Sales Service Business Management Service Management Customization Custom Entities

| Entity | Create | Read | Write | Delete | Append | Append To | Assign | Share |
|-------------------------------------|--------|------|-------|--------|--------|-----------|--------|-------|
| DPS License | ○ | ● | ○ | ○ | ○ | ○ | | |
| DPS License User | ○ | ● | ○ | ○ | ○ | ○ | | |
| DPS Organization Structure Settings | ○ | ● | ○ | ○ | ○ | ○ | | |
| Filter | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| Post Configuration | ○ | ○ | ○ | ○ | ○ | ○ | | |
| Post Rule Configuration | ○ | ○ | ○ | ○ | ○ | ○ | | |
| Profile Album | ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| Wall View | ○ | ○ | ○ | ○ | ○ | ○ | | |

Uninstall

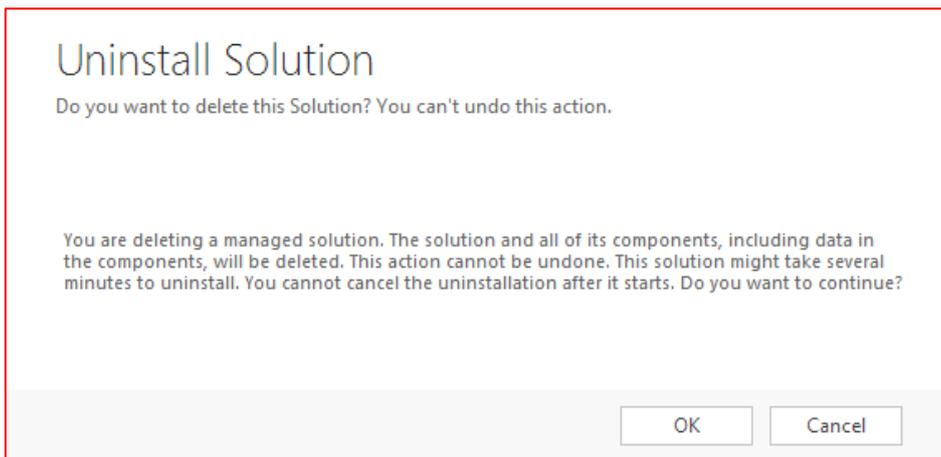
1. Login to Dynamics CRM and go to the Solutions in Settings Area.

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.

Support: <http://www.dynamics-pros.com/support>

Download: <http://www.dynamics-pros.com/downloads>

