



# GroupCalendar for MS CRM 2011

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Version 5.0, August 2013

## **Installation Guide**

(How to install/uninstall GroupCalendar for MS CRM 2011)

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## 1 Common Information

Before installing GroupCalendar for MS CRM 2011, please read this document and follow the steps carefully.

### 1.1 Intended Audience

This guide is intended for system administrators who are familiar with the following administrative tasks:

- Maintaining and configuring SQL Server databases
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM Server

## 2 License

The product comes with a 14-days trial license.

Information about licensing can be found on [www.mscrm-addons.com](http://www.mscrm-addons.com)

## 3 Prerequisites

### 3.1 Microsoft .NET Framework 4.0 RTM is required

The RTM version of Microsoft .NET Framework 4.0 is required.

### 3.2 Supported CRM Versions

Microsoft Dynamics CRM 2011 RTM OnPremise

### 3.3 Windows Identity Foundation

Will be installed as part of the GroupCalendar Server Setup.

### 3.4 Supported Operating Systems

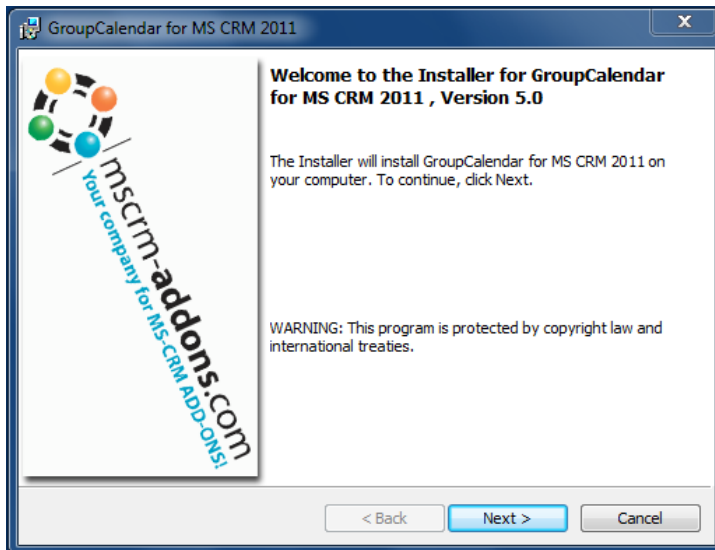
Windows Server 2008 64bit  
Windows Server 2008 R2 64bit

## 4 Installation GroupCalendar

During the installation you have to specify at least one organization in which GroupCalendar will be installed.

### 4.1 Introduction

Click „NEXT“ on the Welcome-Page.



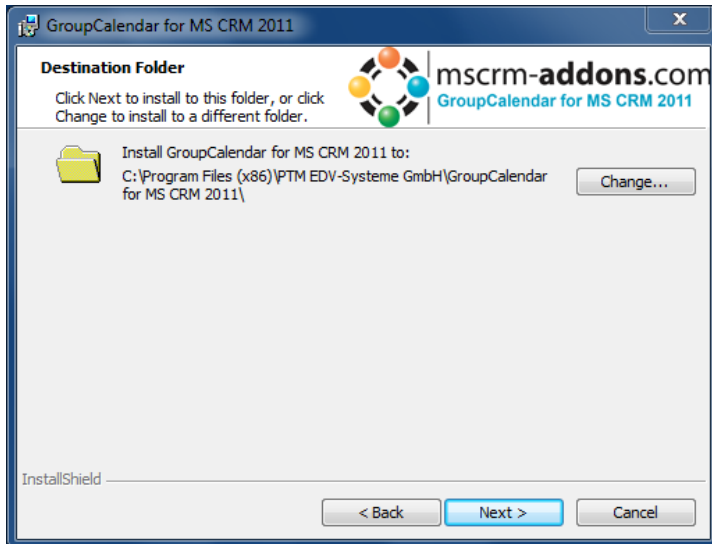
### 4.2 EULA (End User License Agreement)



You have to accept the license and click „NEXT“

### 4.3 Folder Selection

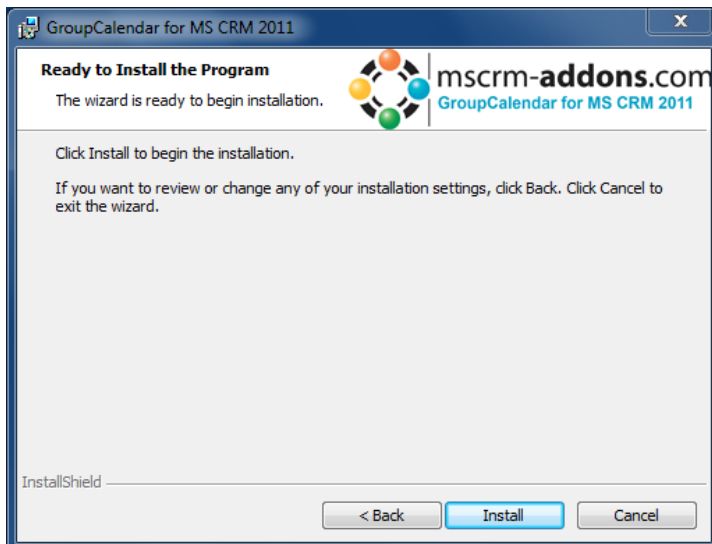
Choose the installation folder:



Click [Change] to specify a different installation path.

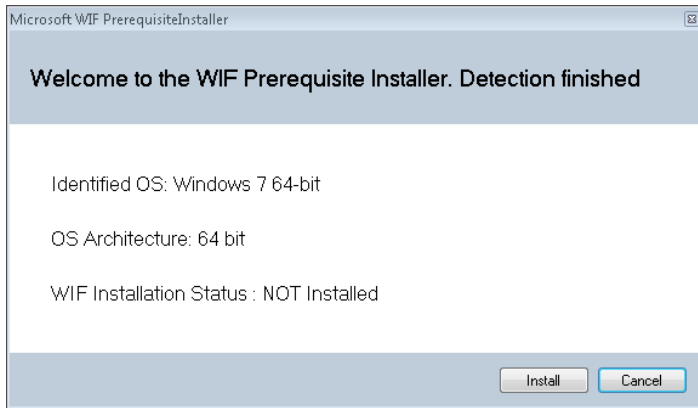
### 4.4. Confirm Installation

To start installing the GroupCalendar click „NEXT“:



## 4.5 Install Windows Identity Foundation

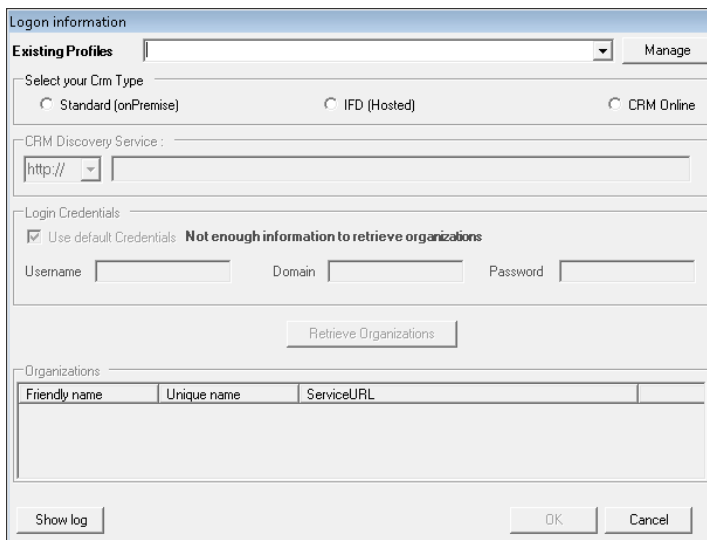
To use GroupCalendar for MS CRM 2011 you have to install the Windows Identity Foundation. If Windows Identity Foundation is not installed, this dialog will be shown automatically during installation.



## 4.6 Configure CRM Server

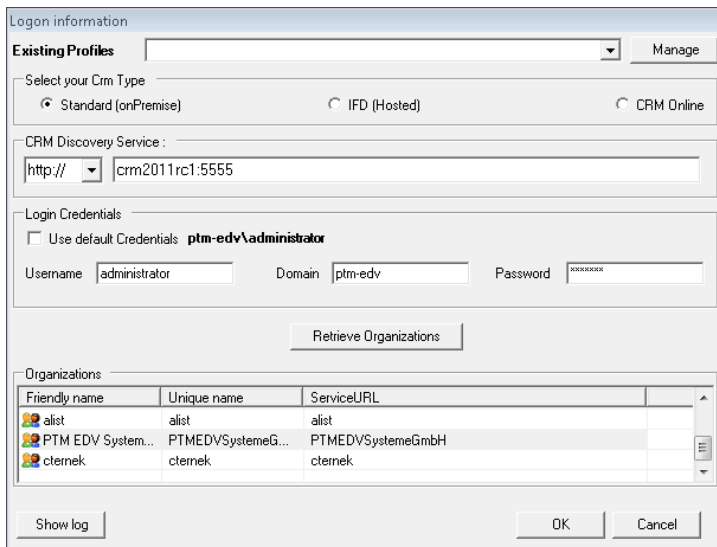
To configure your CRM Server, select your Profile or create a new profile and select your CRM Server type.

The IFD configuration has to be done, if your CRM is configured for that. For more information please click [here](#).



Choose the server path and add your login credentials by filling in the field's username, password and domain or choose the default credentials.

As soon as the Organizations are retrieved press the "OK"-button.



Logon information

Existing Profiles: [dropdown] Manage

Select your Crm Type

Standard (onPremise)  IFD (Hosted)  CRM Online

CRM Discovery Service:

[http://] [crm2011rc1:5555]

Login Credentials

Use default Credentials: **ptm-edv\administrator**

Username: administrator Domain: ptm-edv Password: [masked]

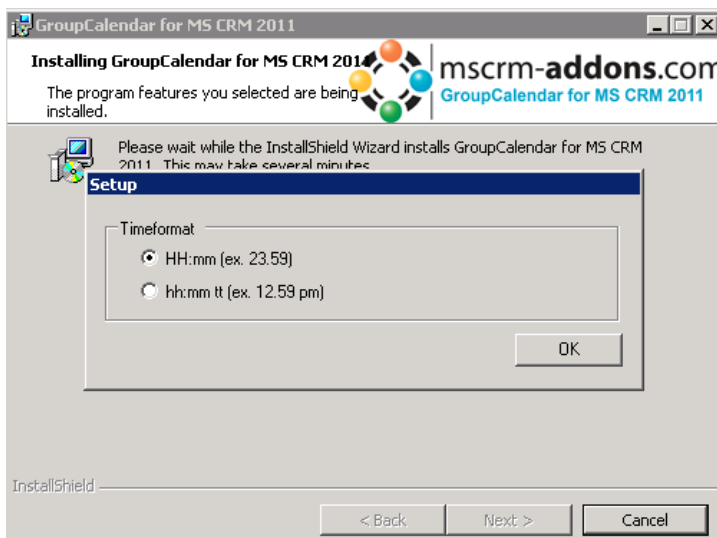
Retrieve Organizations

Friendly name	Unique name	ServiceURL
alist	alist	alist
PTM EDV System...	PTMEDVSystemeG...	PTMEDVSystemeGmbH
cternek	cternek	cternek

Show log OK Cancel

#### 4.7 Time Format

Select the Time Format which should be used by GroupCalendar



GroupCalendar for MS CRM 2011

Installing GroupCalendar for MS CRM 2011

The program features you selected are being installed.

Please wait while the InstallShield Wizard installs GroupCalendar for MS CRM 2011. This may take several minutes.

Setup

Timeformat

HH:mm (ex. 23:59)

hh:mm tt (ex. 12:59 pm)

OK

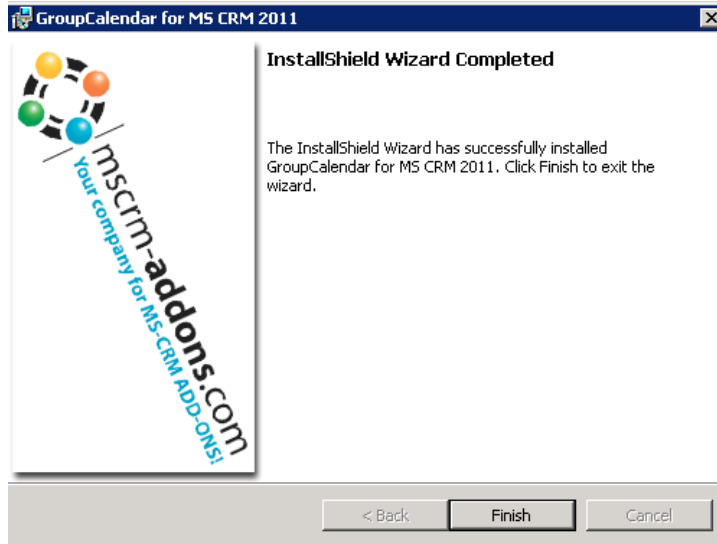
InstallShield

< Back Next > Cancel



## 4.8 Finish

Installation is finished.



## 5 Security Roles

### General securityroles for all products:

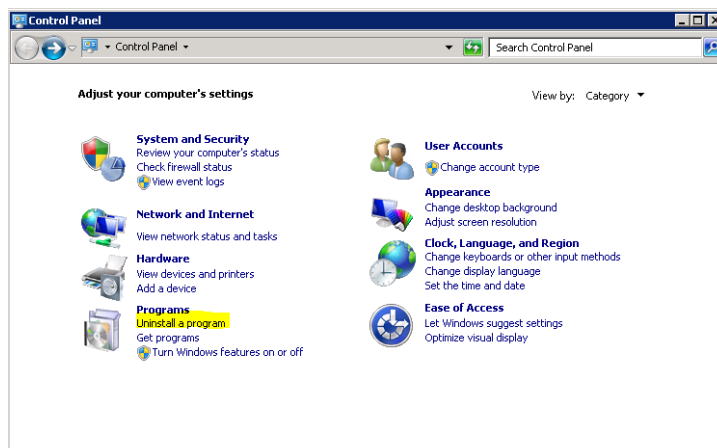
The following securityrole is required by all our products.

- MSCRM-Addons General Security Role

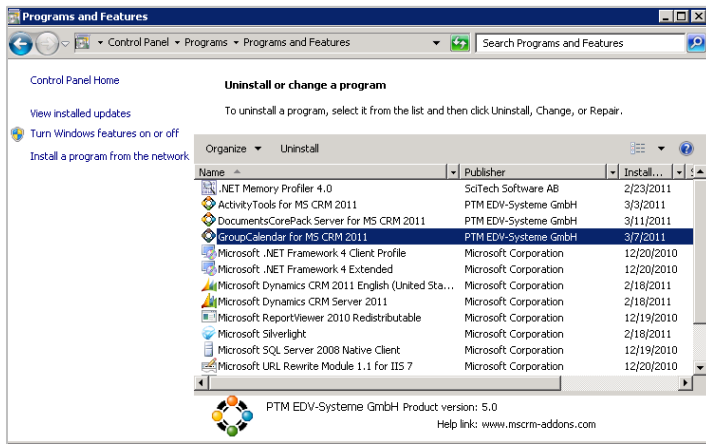
This security role contains the basic requirements for using the product itself and to be able to perform the licensecheck.

## 6 Uninstall GroupCalendar

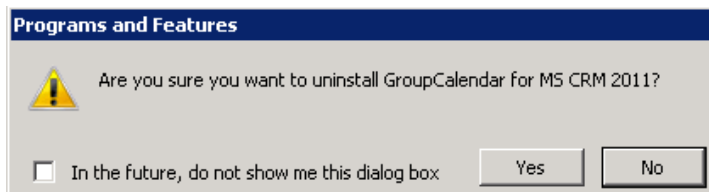
To uninstall GroupCalendar, open "Uninstall a program" in the Control Panel



Find "GroupCalendar for MS CRM 2011", select it and click on "Uninstall"



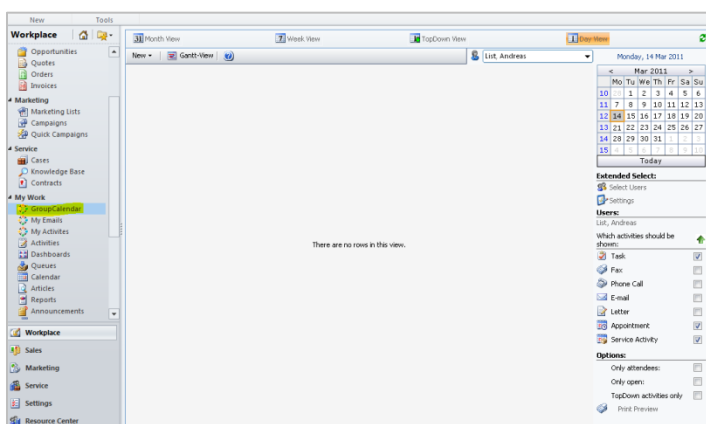
Confirm the question if you're sure to uninstall GroupCalendar



It may take a few minutes to uninstall GroupCalendar.

## 7 Testing the Installation

Open MS CRM and you will see a new entry in the CRM navigation:



Another way is to open the Internet Explorer and open:

[http://SERVER:PORT/ORGANIZATION/WebResources/ptm\\_WebApplicationPreloaderGroupCalendar](http://SERVER:PORT/ORGANIZATION/WebResources/ptm_WebApplicationPreloaderGroupCalendar)

## 8 Installing GroupCalendar, Activity Tools and DocumentsCorePack in an IFD/Claims-based-Environment

You need to have the following downloads present to successfully setup the Addon:

1. IFD-Tool -<http://www.mscrm-addons.com/Downloads/DownloadIFDToolforMSCRM2011/tabid/195/ctl/Login/Default.aspx?returnurl=%2fDownloads%2fDownloadIFDToolforMSCRM2011%2ftabid%2f195%2fDefault.aspx> you need to have a login on our web site
2. For installing GroupCalendar you need at least version 5.12 from our download Section: <http://www.mscrm-addons.com/Downloads/tabid/32/Default.aspx>
3. For installing ActivityTools you need at least version 5.13 from our download Section: <http://www.mscrm-addons.com/Downloads/tabid/32/Default.aspx>
4. For installing DocumentsCorePack you need at least version 5.18 from our download Section: <http://www.mscrm-addons.com/Downloads/tabid/32/Default.aspx>

Before you start installing, MS CRM is required to be working correctly in IFD/Claims-Mode, including your ADFS, which should be installed correctly and configured to work with MS CRM.

More details on how to configure MSCRM for IFD/Claims can be found in the Microsoft Guide "Configuring Claims-based Authentication for Microsoft Dynamics CRM 2011" download: <http://www.microsoft.com/en-us/download/details.aspx?id=3621>

The following system configuration is the basis for our guide. Your setup will differ in these URLs, make sure you are replacing the URLs with your own URLs when following the guide.

Internal Url used to access Microsoft Dynamics CRM:  
<https://internalcrm.rc1ifd.ptm-edv.at>

External Url used to access Microsoft Dynamics CRM:  
[https://\[orgname\].rc1ifd.ptm-edv.at](https://[orgname].rc1ifd.ptm-edv.at)

AD FS Server: <https://win2008domain.ptm-edv.at>

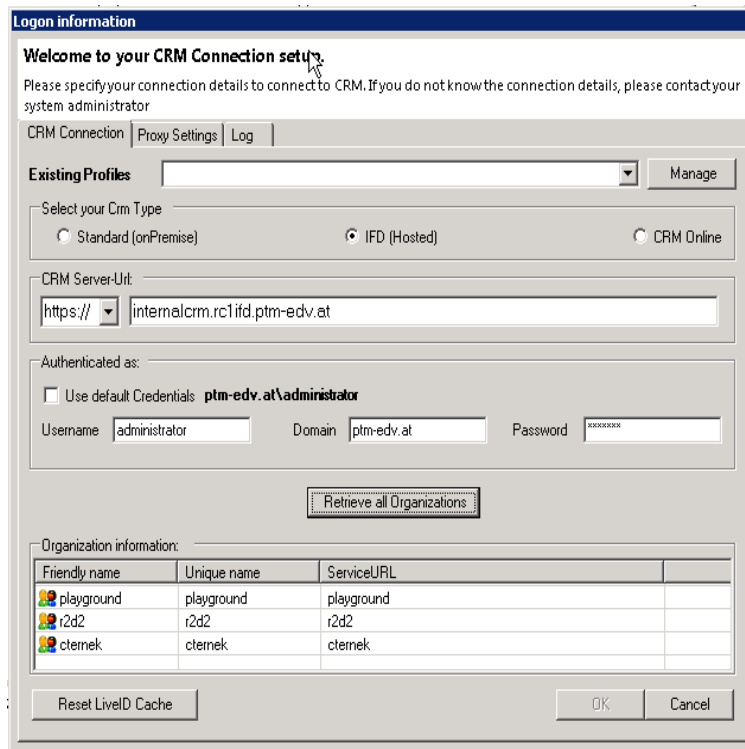
The Addon itself also requires a dns name:  
<https://activitytoolsserver.rc1ifd.ptm-edv.at>  
or

<https://groupcalendarserver.rc1ifd.ptm-edv.at>  
or

<https://documentscorepackserver.rc1ifd.ptm-edv.at>

Basic installation/configuration of our Add-On:

1. Install the Addon on the CRM Server.
2. You will be asked for the Logon Informations. Fill in the internal IFD name of your CRM. In our case it is internalcrm.rc1ifd.ptm-edv.at select the organization on which you want to install the Addon and click on OK.



**Logon information**

**Welcome to your CRM Connection setup**

Please specify your connection details to connect to CRM. If you do not know the connection details, please contact your system administrator

CRM Connection | Proxy Settings | Log

Existing Profiles: [Dropdown] [Manage]

Select your Crm Type

Standard (onPremise)  IFD (Hosted)  CRM Online

CRM Server-Url:   
 https:// [Dropdown] internalcrm.rc1ifd.ptm-edv.at

Authenticated as:

Use default Credentials **ptm-edv.at\administrator**

Username: administrator Domain: ptm-edv.at Password: [Masked]

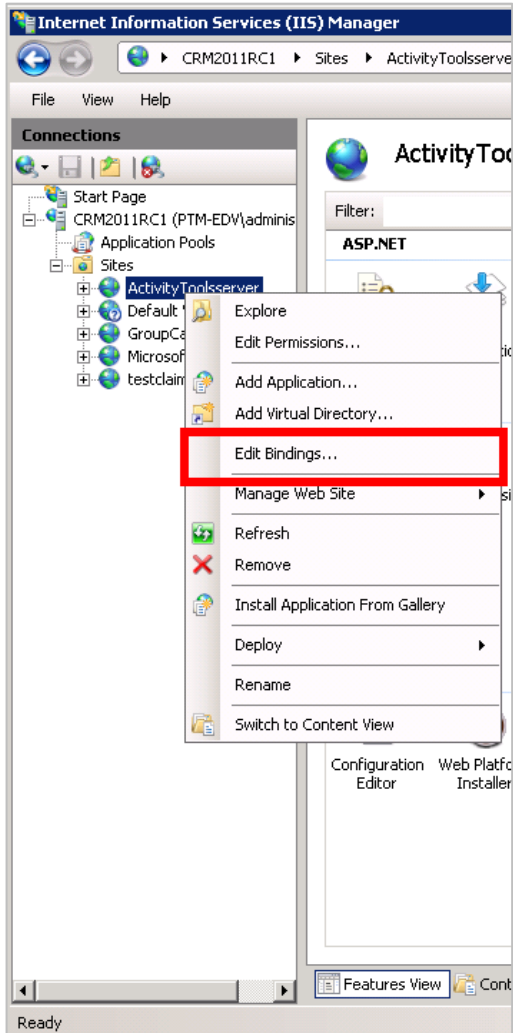
[Retrieve all Organizations]

Organization information:

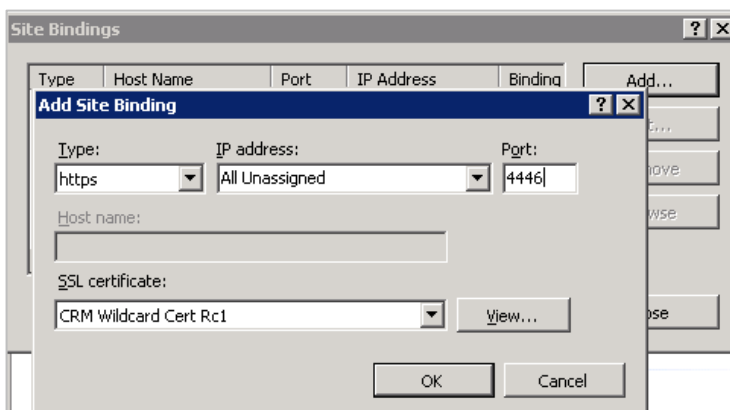
Friendly name	Unique name	ServiceURL
playground	playground	playground
r2d2	r2d2	r2d2
ctemek	ctemek	ctemek

[Reset LiveD Cache] [OK] [Cancel]

**3.** After the installation is finished you have to open the IIS ( inetmgr.exe ) and go to Sites -> the Addon WebSite. Right click the ActivityToolsserver or GroupCalendarserver - WebSite and select "Edit Bindings..."



**4.** On the Bindings click on "Add..." and select in the "Add Site Binding" the type "https". You also have to specify the Port in our example we use 4446



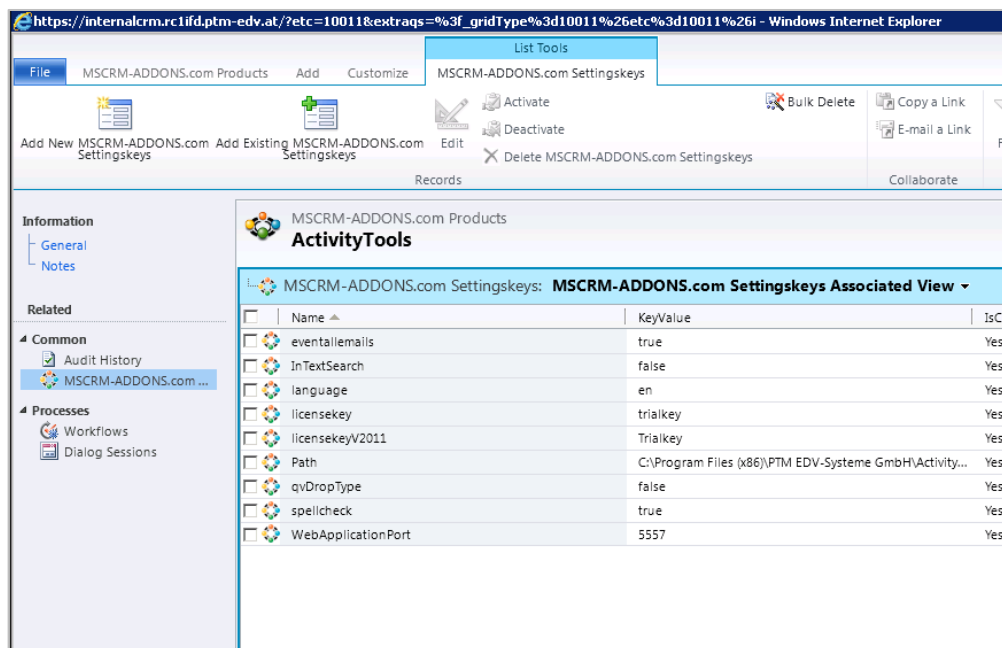
With that we have made the web site available for https. Click on OK.

**5.** Reselect the Addon website and double click on the "Authentication" item in the right side details pane. Verify that the options "Anonymous" and "ASP.Net Impersonation" settings are enabled.

**6.** The Addon url need to be added to your DNS Server. Your DNS-Servers have to resolve the activitytoolsserver.[your-domain] orgroupcalendarserver.[yourdomain] names correctly. This means they should resolve it with the same IP address as your CRM Server has. IF you are having an external DNS, make sure that both external and internal DNS are able to resolve the URL.

**7.** Extract the IFD-Tool (zip-File), that you downloaded before and execute theIFDSetupWizard.exe. Follow the steps in the IFD Setup carefully.

**8.** Open your CRM in Internet Explorer and go to "Settings" -> "MSCRM-ADDONS.com Products" -> Open the Addon-> in the MSCRM-ADDONS.com Products form select the MSCRM-ADDONS.com Settingskeys and search for the "WebApplicationPort" entry.



Name	KeyValue	IsCa
eventallemails	true	Yes
InTextSearch	false	Yes
language	en	Yes
licensekey	trialkey	Yes
licensekeyV2011	Trialkey	Yes
Path	C:\Program Files (x86)\PTM EDV-Systeme GmbH\Activity...	Yes
qvDropType	false	Yes
spellcheck	true	Yes
WebApplicationPort	5557	Yes

**9.** Open the WebApplicationPort and replace the existing KeyValue with the following: [httpsPort]|[httpPort]|[claimsbased]|[addonname]|[debugging]  
 e.g.: 4446|5557|true|activitytoolsserver|false

---

We have finished the configuration of the CRM Part and now need to configure the AD FS.

1. Please logon your AD FS Server and start AD FS 2.0 Management.
2. On the Actions menu located in the right column, click Add Relying Party Trust.
3. In the Add Relying Party Trust Wizard, click Start
4. On the Select Data Source page, click Import data about the relying party published online or on a local network, and then type the URL to locate the federationmetadata.xml file.

This federation metadata is created with the IFD-Tool on the CRM Server. For example,

<https://activitytoolsserver.rc1ifd.ptm-edv.at:4446/FederationMetadata/2007-06/FederationMetadata.xml>

Type this URL in your browser and verify that no certificate-related warnings appear.

5. Click Next.
6. On the Specify Display Name page, type a display name, such as ActivityTools IFD, and click on Next.
7. On the Choose Issuance Authorization Rules page, leave the Permit all users to access this relying party option selected, and then click Next.
8. On the Ready to Add Trust page, click Next, and then click Close.
9. If the Rules Editor appears, click Add Rule. Otherwise, in the Relying Party Trustslist, right-click the relying party object that you created, click Edit Claims Rules, and then click Add Rule. **Important:** Be sure the Issuance Transform Rules tab is selected.
10. In the Claim rule template list, select the Pass Through or Filter an Incoming Claim template, and then click Next.

11. Create the following rule:

- Claim rule name: Pass Through UPN (or something descriptive)
- Add the following mapping:
  - i. Incoming claim type: UPN
  - ii. Pass through all claim values

12. Click Finish.

13. In the Rules Editor, click Add Rule, and in the Claim rule template list, select thePass Through or Filter an Incoming Claim template, and then click Next:

- Claim rule name: Pass Through Primary SID (or something descriptive)
- Add the following mapping:
  - i. Incoming claim type: Primary SID
  - ii. Pass through all claim values

14. Click Finish.

**15.** In the Rules Editor, click Add Rule,

**16.** In the Claim rule template list, select the Transform an Incoming Claim template, and then click Next.

**17.** Create the following rule:

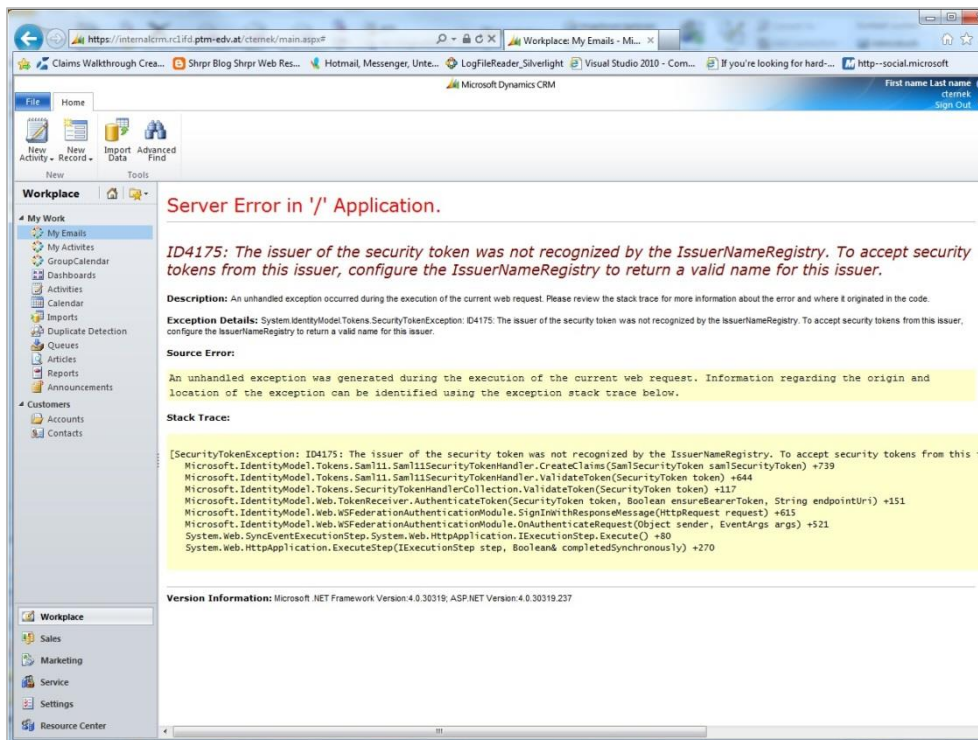
- Claim rule name: Transform Windows Account Name to Name (or something descriptive)
- Add the following mapping:
  - i. Incoming claim type: Windows account name
  - ii. Outgoing claim type: Name
  - iii. Pass through all claim values

**18.** Click Finish, and when you have created all three rules, click OK to close the Rules Editor.

**19.** You have finished the configuration and you should be able to use the Addon in your IFD/Claims Environment now.

## Troubleshooting:

If you see this error:



**Server Error in '/' Application.**

**ID4175: The issuer of the security token was not recognized by the IssuerNameRegistry. To accept security tokens from this issuer, configure the IssuerNameRegistry to return a valid name for this issuer.**

**Description:** An unhandled exception occurred during the execution of the current web request. Please review the stack trace for more information about the error and where it originated in the code.

**Exception Details:** System.IdentityModel.Tokens.SecurityTokenException: ID4175: The issuer of the security token was not recognized by the IssuerNameRegistry. To accept security tokens from this issuer, configure the IssuerNameRegistry to return a valid name for this issuer.

**Source Error:**

An unhandled exception was generated during the execution of the current web request. Information regarding the origin and location of the exception can be identified using the exception stack trace below.

**Stack Trace:**

```

[System.IdentityModel.Tokens.SecurityTokenException: ID4175: The issuer of the security token was not recognized by the IssuerNameRegistry. To accept security tokens from this issuer, configure the IssuerNameRegistry to return a valid name for this issuer.]
   Microsoft.IdentityModel.Tokens.Saml11.Saml11SecurityTokenHandler.CreateClaims(SamlSecurityToken samlSecurityToken) +739
   Microsoft.IdentityModel.Tokens.Saml11.Saml11SecurityTokenHandler.ValidateToken(SecurityToken token) +644
   Microsoft.IdentityModel.Tokens.SecurityTokenHandlerCollection.ValidateToken(SecurityToken token) +117
   Microsoft.IdentityModel.Web.TokenReceiver.AuthenticateToken(SecurityToken token, Boolean ensureBearerToken, String endpointUri) +151
   Microsoft.IdentityModel.Web.WSFederationAuthenticationModule.SignInWithResponseMessage(HttpRequest request) +615
   Microsoft.IdentityModel.Web.WSFederationAuthenticationModule.OnAuthenticateRequest(Object sender, EventArgs args) +521
   System.Web.SyncEventExecutionStep.System.Web.HttpApplication.IExecutionStep.Execute() +80
   System.Web.HttpApplication.ExecuteStep(IExecutionStep step, Boolean& completedSynchronously) +270
  
```

**Version Information:** Microsoft .NET Framework Version: 4.0.30319; ASP.NET Version: 4.0.30319.237



### Reason 1:

This indicates you are using a wrong certificate for the ADFS signing. Make sure the thumbprint in the web.config matches the one the token signing certificate in ADFS.

```
<issuerNameRegistry typetype="Microsoft.IdentityModel.Tokens.ConfigurationBasedIssuerNameRegistry,
Microsoft.IdentityModel, Version=3.5.0.0, Culture=neutral,
PublicKeyToken=31bf3856ad364e35"><trustedIssuers><add
thumbprint="37a59abae1a394ffd8f0fd750c2e38e98069e349"

name="http://win2008domain.ptm-edv.at/adfs/services/trust" />
</trustedIssuers></issuerNameRegistry>
```

### Reason 2:

This error could also indicate access rights problems with the certificates private key (Mainly an issue for self-signed certificates).

Open your certificate store on the server (MMC, add certificate snapin for local computer) and find your HTTPS certificate. In the context menu, under all tasks select the "manage private keys" option and grant access to everyone.

Checklist for general troubleshooting:

- Is the Setting WebApplicationPort still intact
- Are there any not http/https bindings in CRM
- Are there any not http/https bindings in the products website
- Is the DNS correctly resolving the products link
- Has the ConnectionProfile been created with IFD as connection type

If you have any questions regarding this article or troubles getting this to work or you want to give us some feedback please send an email to [support@mscrm-addons.com](mailto:support@mscrm-addons.com)

## 9 Install GroupCalendar for MS CRM 2011 online

If you purchased GroupCalendar, you need to follow the instructions below. We'll not install GroupCalendar into your organization as a trial. For that, we have our own test organization environment where you can have a closer look at GroupCalendar for CRM 2011 Online.

Please click here to get details about how to connect to our CRM Online test-organization:

<http://www.mscrm-addons.com/TestouraddonswithCRMOnline/tabid/228/Default.aspx>

To install GroupCalendar 2011 Online, please follow the instructions:  
There are two different possibilities:

- The first one is for CRM Online with Live ID authentication
- Below that you will find the instructions for CRM Online with Office 365 authentication

**NOTE:** after everything is set up and running please don't disable the user!

### CRM with Live ID

1. Please invite the Live ID [mscrmaddonsazureservice@hotmail.com](mailto:mscrmaddonsazureservice@hotmail.com) to your organization. The user must be system administrator so we could install GroupCalendar into your organization. If you don't have any users left, please disable temporary another user while the GC installation is finished.
2. We'll install GroupCalendar into your CRM 2011 Online organization. When we're finished, we'll send you an email so you could proceed with the next steps.
3. Please open the GroupCalendar Service User (the user you invited in step 1) under Settings -> Administration -> Users and run the workflow Set MSCRMAddons Service User to non-interactive for that user. This will set the user to a non-interactive access-mode so the user will not be counted for the CRM licensing.
4. We'll remove the system administrator role from that user. Please verify this just to make sure. We've created and assigned a new security role namedMSCRMAddonsAzureService during the setup which covers the basic privileges for the service user.
5. Please open GroupCalendar in the CRM Navigation under Workplace -> My Work and verify if everything is working.

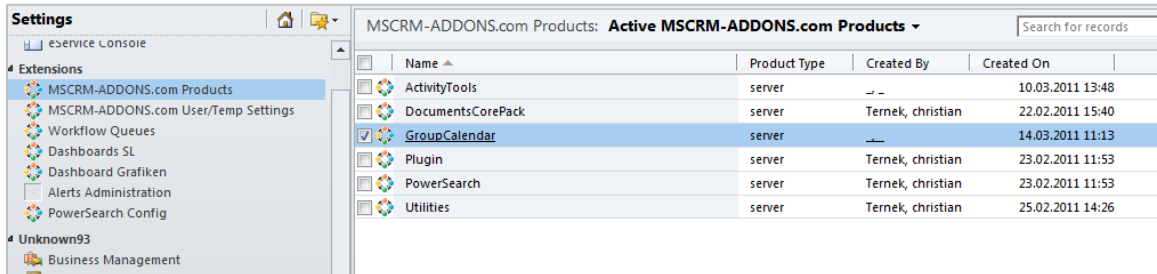
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## CRM with Office 365

- 1.** You have to create a new user in your CRM organization / Office 365. The name is not that important. You could name it for example "mscrmaddonservice" or something like that. The user **must be system administrator within CRM** so we could install GroupCalendar into your organization. If you don't have any users left, please disable temporary another user while the GC installation is finished.
- 2.** Please send us the username for the organization and also the temporary password to [support@mscrm-addons.com](mailto:support@mscrm-addons.com). We'll change this password for security reasons because it will be transferred plain text via mail. During the creation of the user you also have the possibility to specify a mail address where the password should be sent. Please specify [support@mscrm-addons.com](mailto:support@mscrm-addons.com). We recommend to use this method.
- 3.** We will install GroupCalendar into your CRM 2011 Online organization. When we're finished, we'll send you an email so you could proceed with the next steps.
- 4.** Please open the GroupCalendar Service User (the user you created in step 1) under Settings -> Administration -> Users and run the workflow **Set MSCRMAddons Service User to non-interactive** for that user. This will set the user to a non-interactive access-mode **so the user will not be counted for the CRM licensing.**
- 5.** We will remove the system administrator role from that user. Please verify this just to make sure. We've created and assigned a new security role named **MSCRMAddonsAzureService** during the setup which covers the basic privileges for the service user.
- 6.** Please open GroupCalendar in the CRM Navigation under Workplace -> My Work and verify if everything is working.

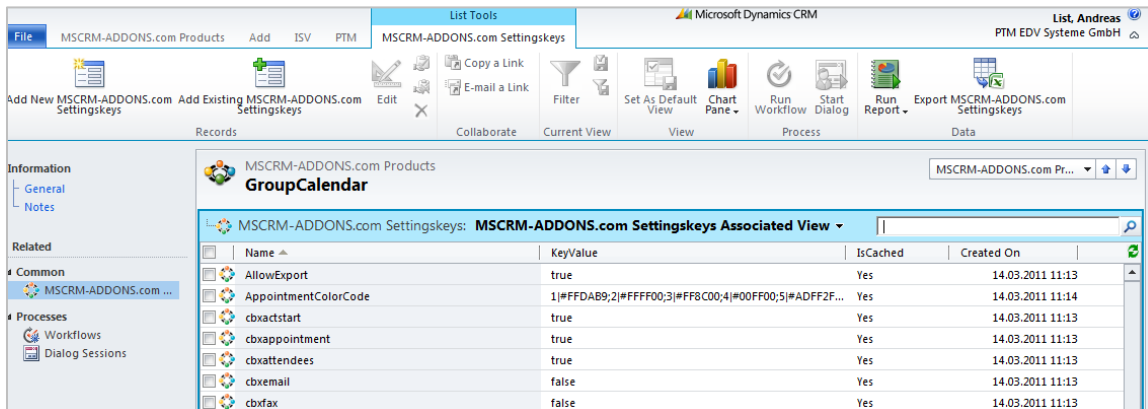
## 10 Configuration in Detail – GroupCalendar Settings

To configure the GroupCalendar, you have to open the GroupCalendar settings within CRM. (Settings -> MSCRM-ADDONS.com Products -> GroupCalendar)



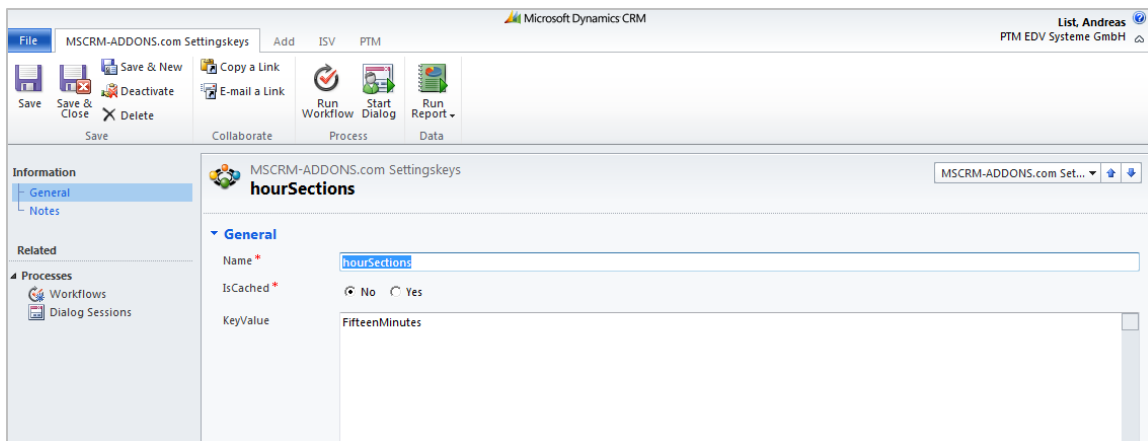
Name	Product Type	Created By	Created On
ActivityTools	server		10.03.2011 13:48
DocumentsCorePack	server	Ternek, christian	22.02.2011 15:40
<b>GroupCalendar</b>	server		14.03.2011 11:13
Plugin	server	Ternek, christian	23.02.2011 11:53
PowerSearch	server	Ternek, christian	23.02.2011 11:53
Utilities	server	Ternek, christian	25.02.2011 14:26

All possible settings are located under “Setting Keys”



Name	KeyValue	IsCached	Created On
AllowExport	true	Yes	14.03.2011 11:13
AppointmentColorCode	1#FFDAB9;2#FFFFFF0;3#FF8C00;4#00FF00;5#ADFF2F...	Yes	14.03.2011 11:14
cbxactstart	true	Yes	14.03.2011 11:13
cbxappointment	true	Yes	14.03.2011 11:13
cbxattendees	true	Yes	14.03.2011 11:13
cbxemail	false	Yes	14.03.2011 11:13
cbxfax	false	Yes	14.03.2011 11:13

Each setting could be modified with a double-click:



**hourSections**

**General**

Name \*

IsCached \*  No  Yes

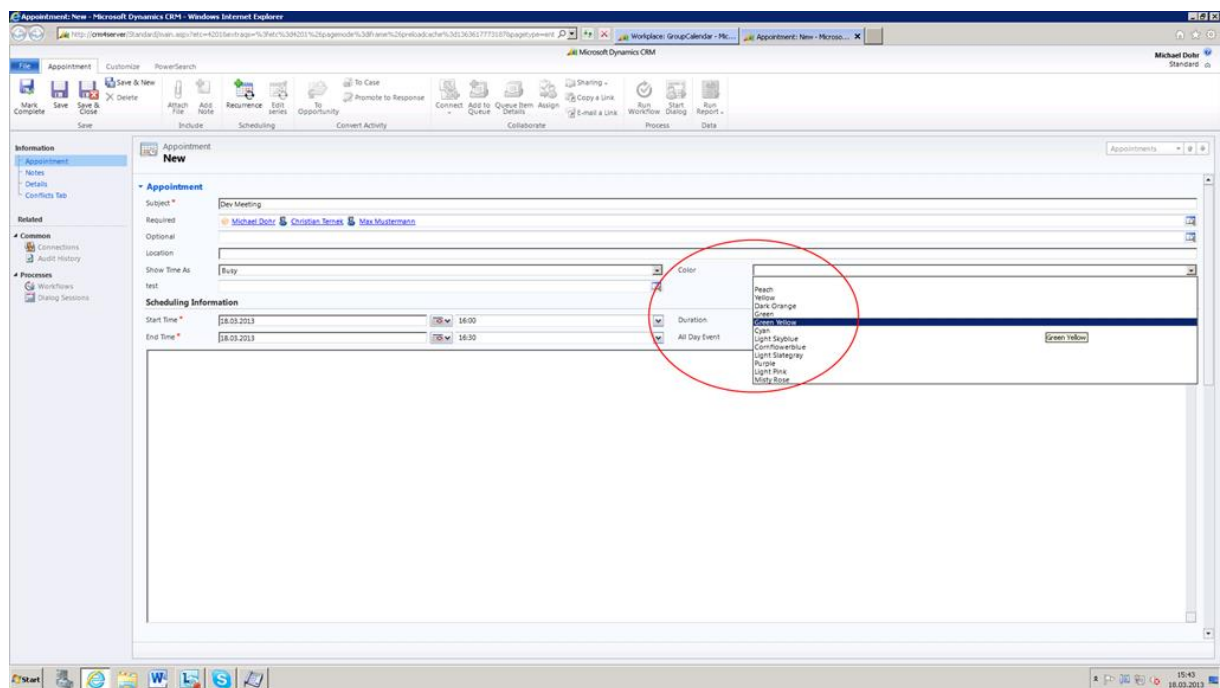
KeyValue

KEY	DESCRIPTION
Language	<p>en ... English de ... German fr ... French</p> <p>Per default the CRM User Language is used. But when this language does not exist for GC, the language configured here is used.</p> <p>Each label in the GroupCalendar can be customized. So it is no problem for you to add new languages. To add a new language go to the subdirectory „App_Data\localization“. There you will find en.xml, de.xml,...</p> <p>Copy the en.xml file save as xy.xml. Change the entries in the xy.xml file and after that change the Language Value in the settings entity to „xy“</p>
TimeFormat	<p>HH:mm ... 24Hour-Format(ex. 23:59) hh:mm tt ... 12Hour-Format (ex. 12:59pm)</p>
CalendarWeekRule	<p>Possible Values: - FirstDay - FirstFourDayWeek - FirstFullWeek</p> <p>Specifies the rule how the week number should be calculated</p>
ignoreStartDateTask ignoreStartDateLetter ignoreStartDateFax ignoreStartDateEmail ignoreStartDatePhonecall	<p>All fields identify, if the activity is shown on the due date (minus duration) only, or shown from start date to end date.</p> <p>Possible Values: - true: Activity is shown from due date minus duration till due date - false: activity is shown from start date till due date</p>
cbxtask	Default-value for the checkbox TASK
cbxfax	Default-value for the checkbox FAX
cbxtelephone	Default-value for the checkbox TELEPHONE
cbxemail	Default-value for the checkbox EMAIL
cbxletter	Default-value for the checkbox LETTER
cbxappointment	Default-value for the checkbox APPOINTMENT
cbxonlyattendees	Default-value for the checkbox ONLYATTENDEES
cbxonlyopen	Default-value for the checkbox ONLYOPEN
ShowAllActivities	Shows all activities a user is allowed to see.
cbxattendees	Show Attendees/Regarding Columns
cbxactstart	use only the actual start field for searching
cbxowner	Show OwnerColumn

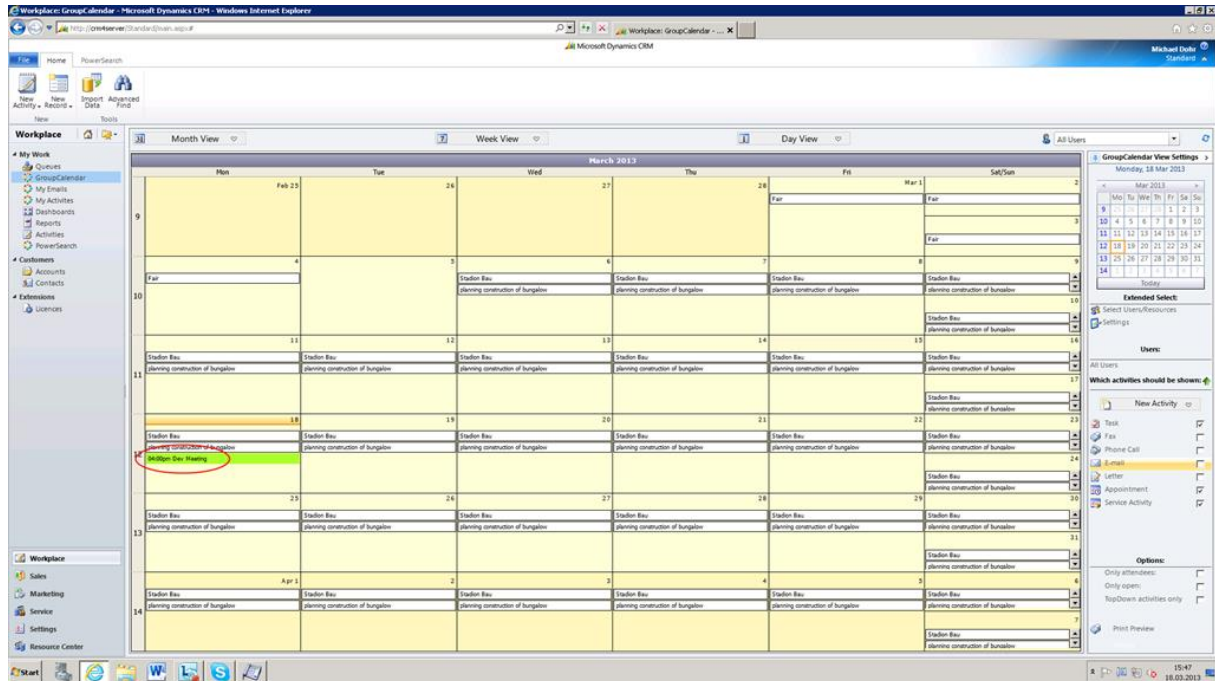
KEY	DESCRIPTION
DoNotShowWebCombo	You could disable the WebCombo for the users, teams and advanced finds. This makes sense when you have a really large number of users and teams. It could slow down GC drastically. You could then select users/teams via the advanced user select dialog
hourSections	You could configure the default timeslot height of the TopDown View Possible Values: FifteenMinutes, FiveMinutes, FourHours, FourMinutes, OneMinute, SixMinutes, SixtyMinutes, TenMinutes, ThirtyMinutes, ThreeHours, ThreeMinutes, TwelveMinutes, TwentyMinutes, TwoHours, TwoMinutes
ScrollHourTopDown	Specify to which hour the TopDown view should scroll when opening. Possible Values: 1 - 24

### 10.1 Color-coding-functionality for all activities

GroupCalendar for MS Dynamics CRM 2011 provides the possibility to define a specific color for each activity. After activating this functionality in the CRM settings, GroupCalendar offers you the possibility to choose a color when scheduling a activity from a drop-down-menu within the activity-entity. (See screenshot below)



After selecting the color, saving the activity and refreshing the GroupCalendar, the scheduled activity is displayed in the chosen color in all GroupCalendar views. (See screenshot below)



### How to activate the color-coding-functionality for activities:

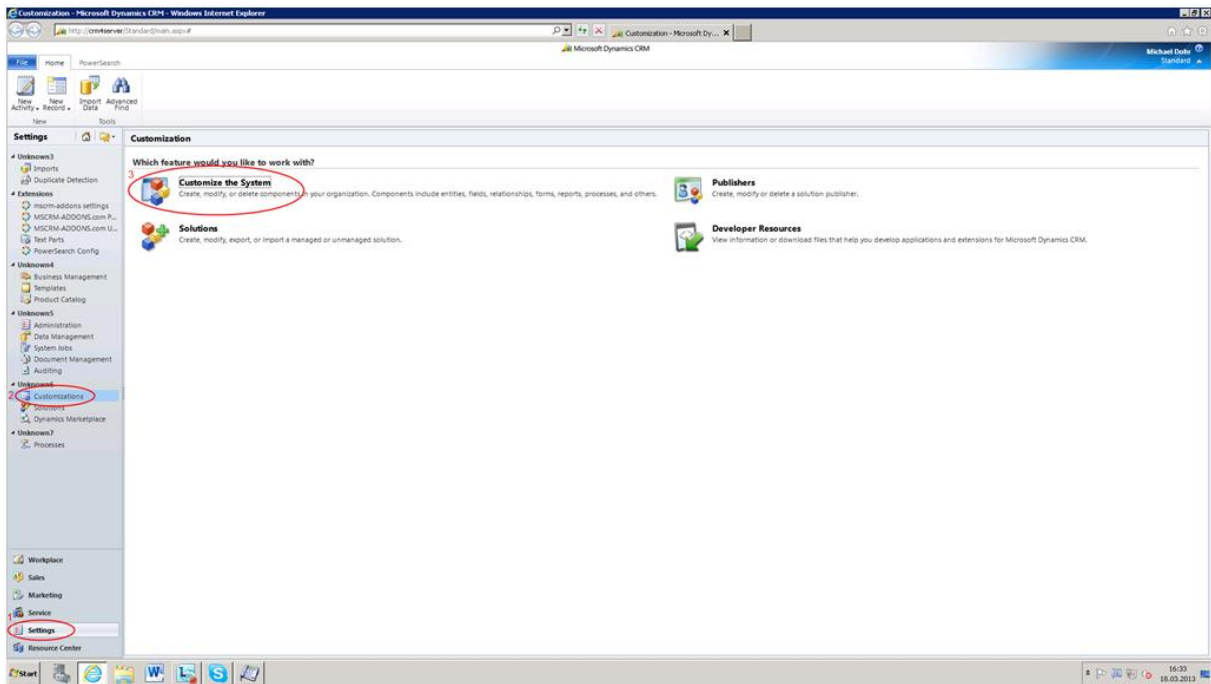
To activate color-coding-functionality, you have to add this attribute to the main form of the activity-entity. The attribute is named "ptm\_colorcode2011" with the display name "Color". It is predefined with 12 colors, but you have the possibility to add additional colors (described in this article further below).

Please follow the simple steps below to activate the functionality.

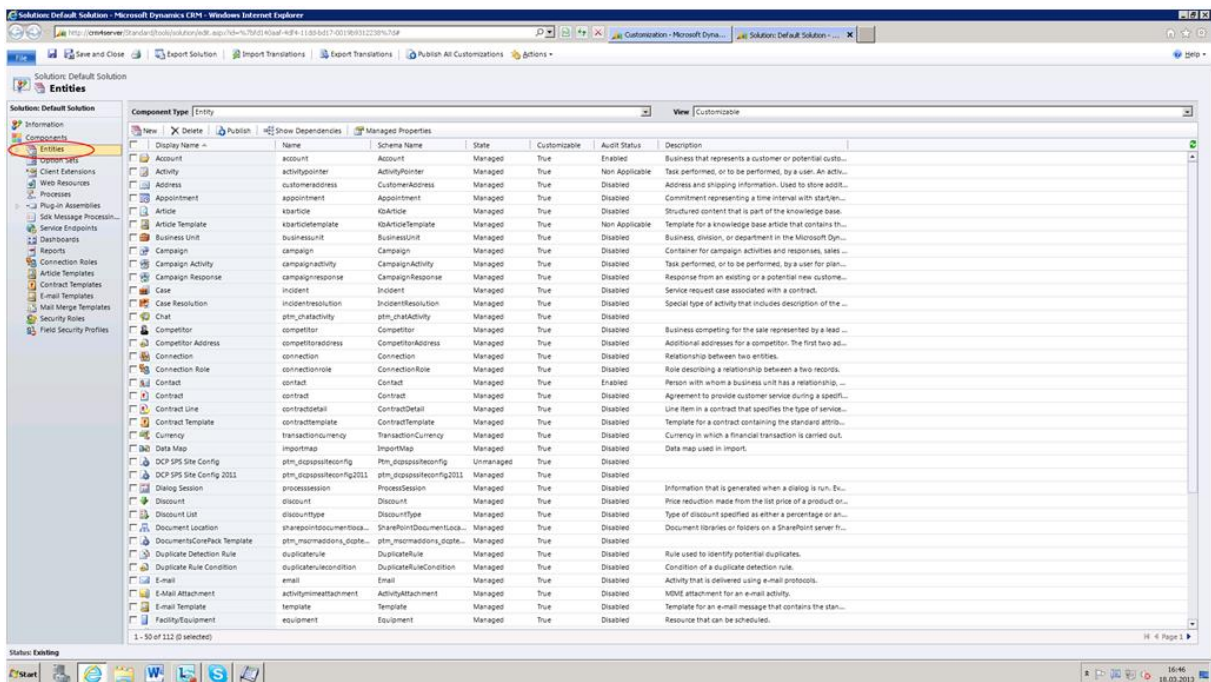
**NOTE:** The example below describes how to activate the color-coding-functionality for the appointment-entity. In order to add this functionality to the other entities, follow the same procedure (steps 1-7) with the exception of choosing the other activity type instead of 'Appointment' within the 'customize the system' area of the CRM settings (for details see step 3).

1. Open your CRM and go to 'Settings' (see screenshot, ellipse 1). Afterwards, click on 'Customization' (see screenshot, ellipse 2) and click on 'Customize the System' (see screenshot, ellipse 3)



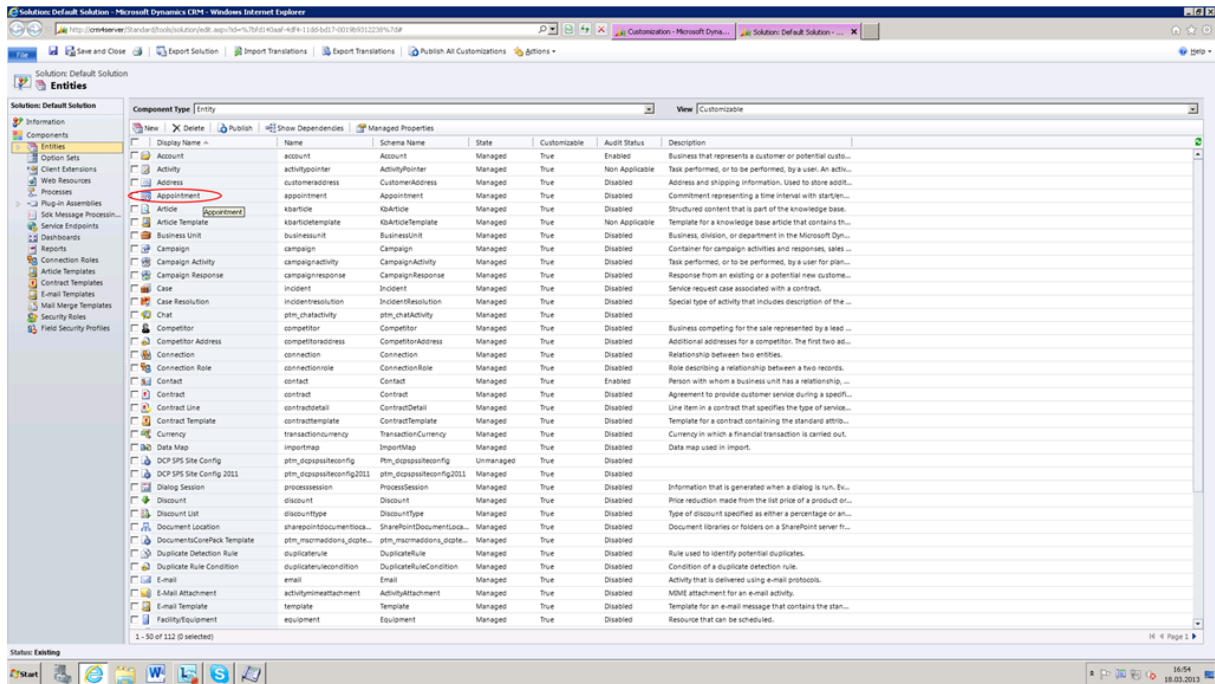


2. After that, a new CRM window opens. Within this window, click on 'Entities' and you will get a list of all entities in your CRM system. (See screenshot below)

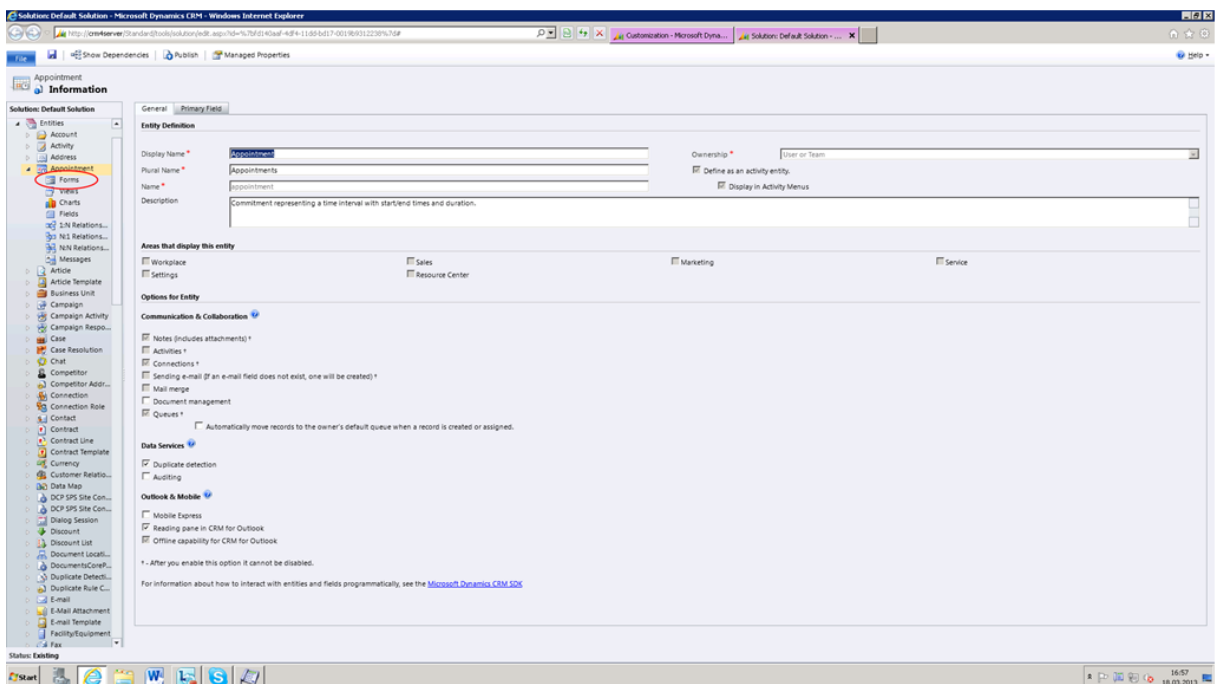


3. Here, choose the entity 'Appointment' and double-click on it. (See screenshot below) **(NOTE: If you would like to activate the color-coding-functionality for other activity types, you have to choose the other activity instead of 'Appointment'.)**

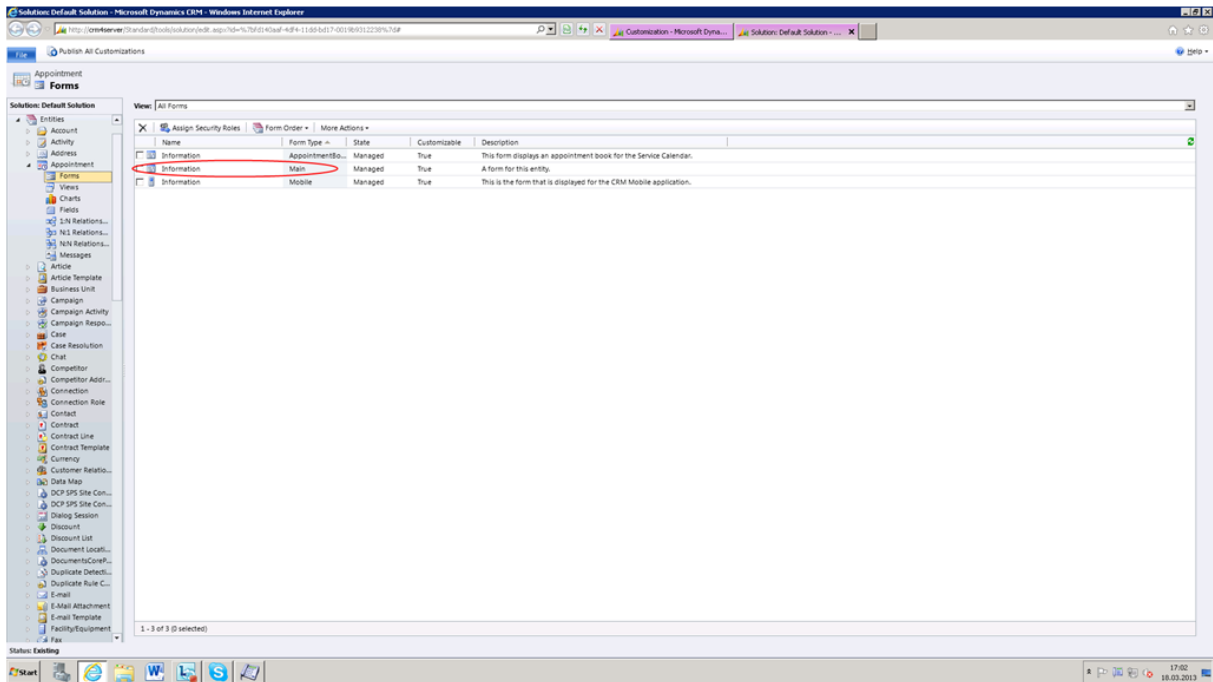




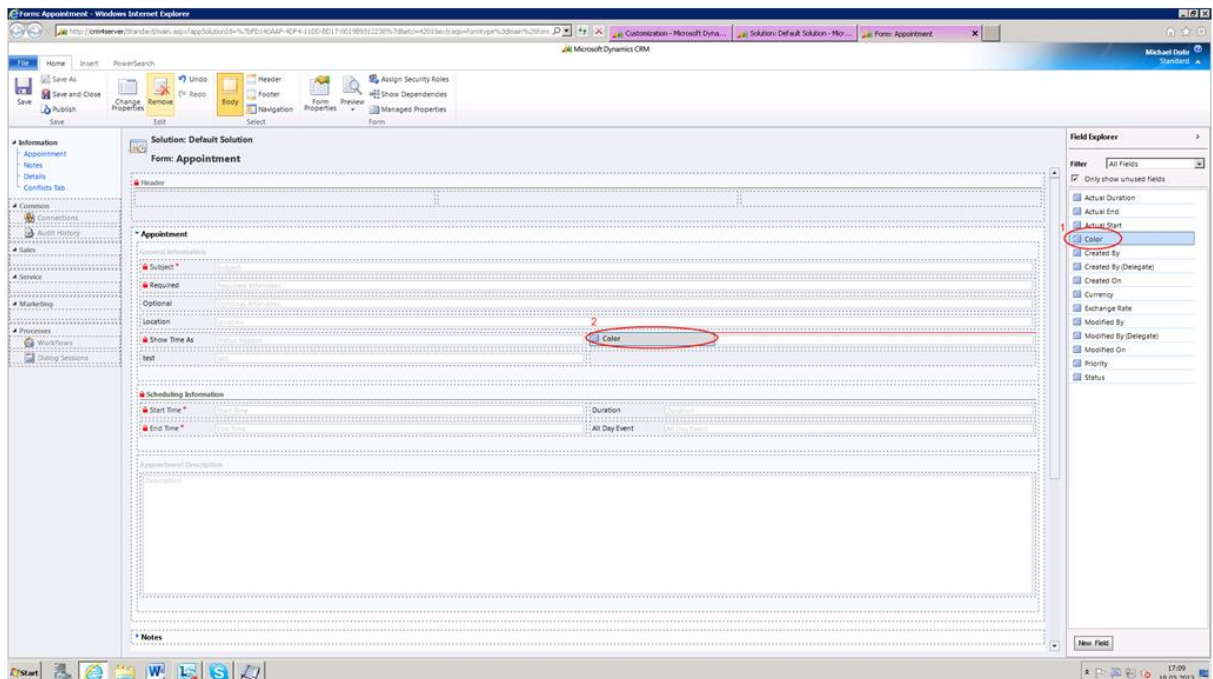
4. The settings of the appointment-entity will open (see screenshot below). Click on 'Forms' within the menu on the left. (See screenshot below, red ellipse)



- Afterwards, you get a list of the forms of the appointment-entity. Double-click on the main-form of the entity. (See screenshot below, red ellipse)



- Here, you can customize the main form of this entity. To add the color-coding-functionality, click on the 'color'-field within the menu on the right (see screenshot below, ellipse 1) and position it in a free space within the form via drag and drop. (See screenshot below, red ellipse 2)



- Afterwards, save and close the window and the color-drop-down-menu will appear from now on within the appointment entity when scheduling an appointment. (see first screenshot of this chapter)

**NOTE:** As already mentioned, for adding this functionality to the other entities, follow the same procedure as described above (steps 1-7) with the exception of choosing another activity type instead of 'Appointment' within the 'customize the system' area of the CRM settings (step 3).

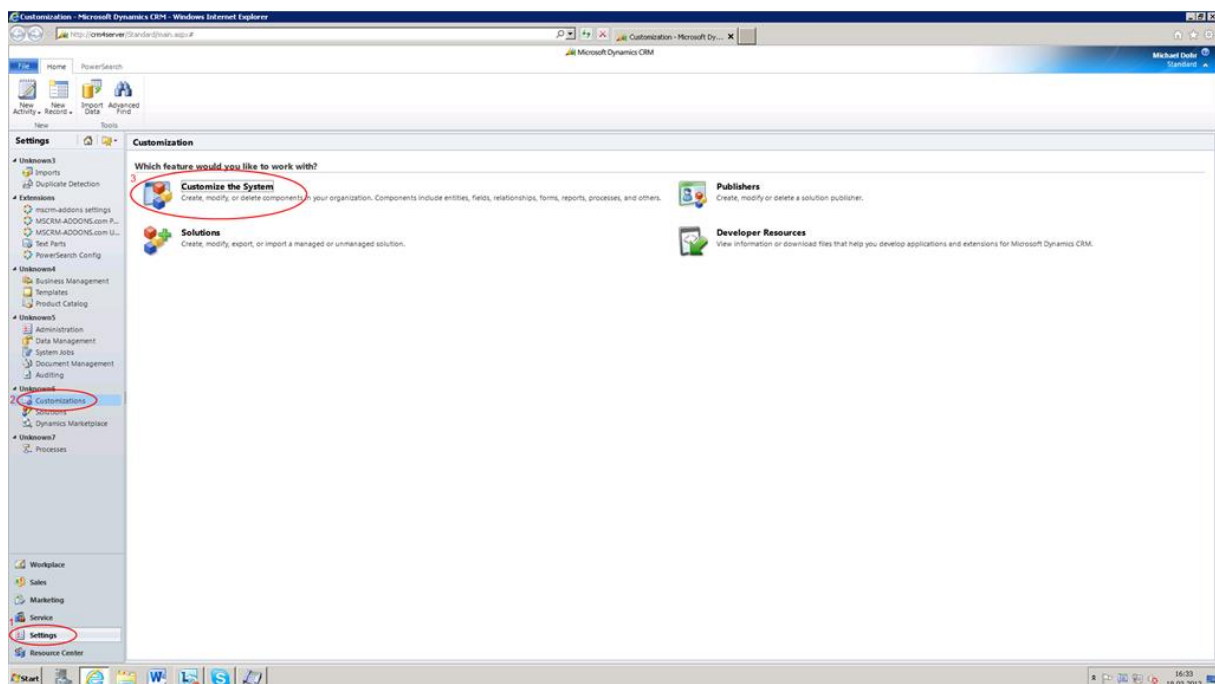
## How to add additional colours

You always have the possibility to add further colors. Before you start the color adding process, it is important that you know the hex code of the color you would like to add. There are several free online color picker tools which help you to find out about the hex code of a specific color (e.g. <http://www.colorpicker.com/>). In our case, we would like to add a light grey color with the hex code #E0E0E0. In the steps below, we describe how to add this color to the color drop-down-menu within the appointment-entity.

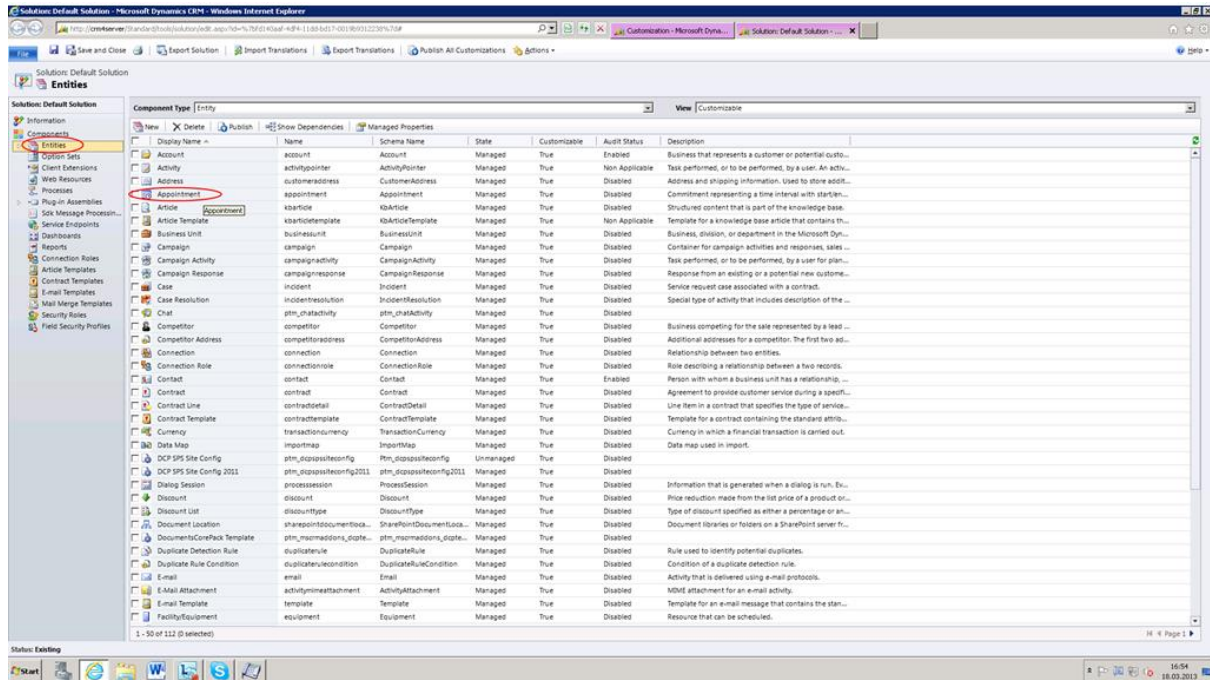
**NOTE:** The procedure is the same for every color you want to add. Also, it is the same procedure for adding a new color to the color drop-down-menu within the other activity entities instead of the appointment entity (you just have to select the other activity type in step 2 and activity type color code in step 7). Following color settings exists for the different activities:

- TaskColorCode
- ServiceAppointmentColorCode
- EmailColorCode
- PhoneCallColorCode
- FaxColorCode
- LetterColorCode
- AppointmentColorCode

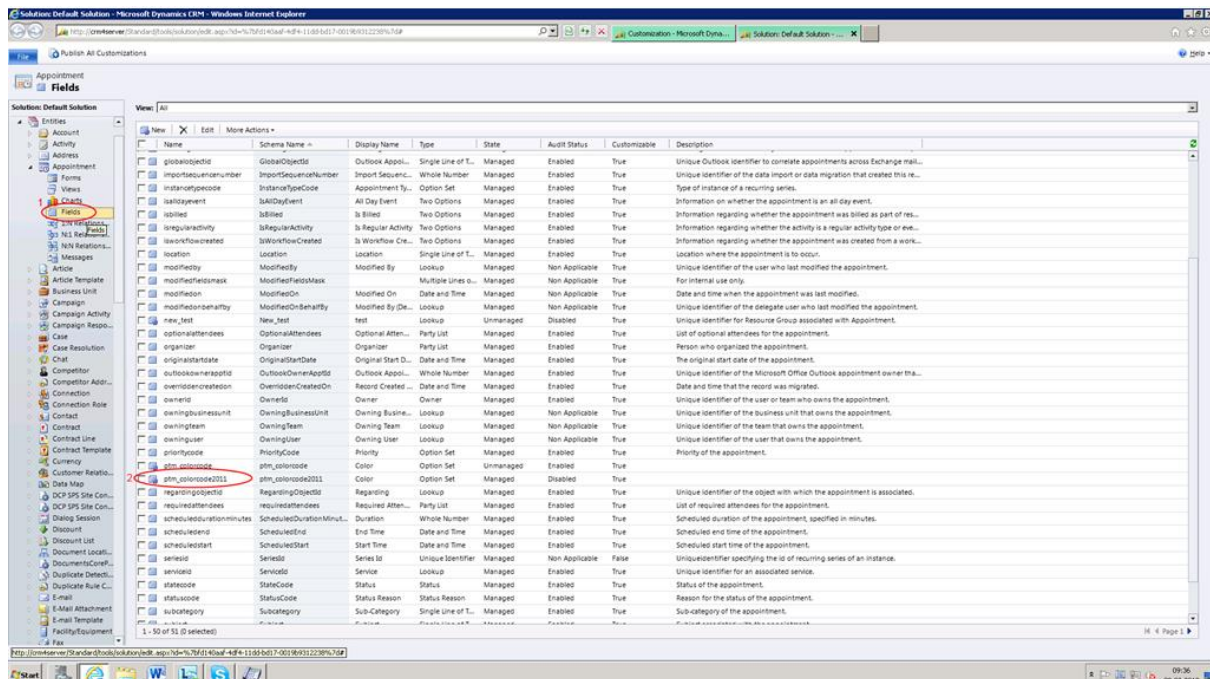
1. Start in the 'Settings'-area of your CRM system, click on 'Customizations' within the menu on the left and then choose 'Customize the System'. (See screenshot below, click to enlarge)



- Afterwards, click on 'Entities' within the menu on the left and double-click on the 'Appointment'-entity. (See screenshot below) **NOTE:** If you would like to add a colour to the colour drop-down-menu within another activity entity, you have to select another activity within this step.

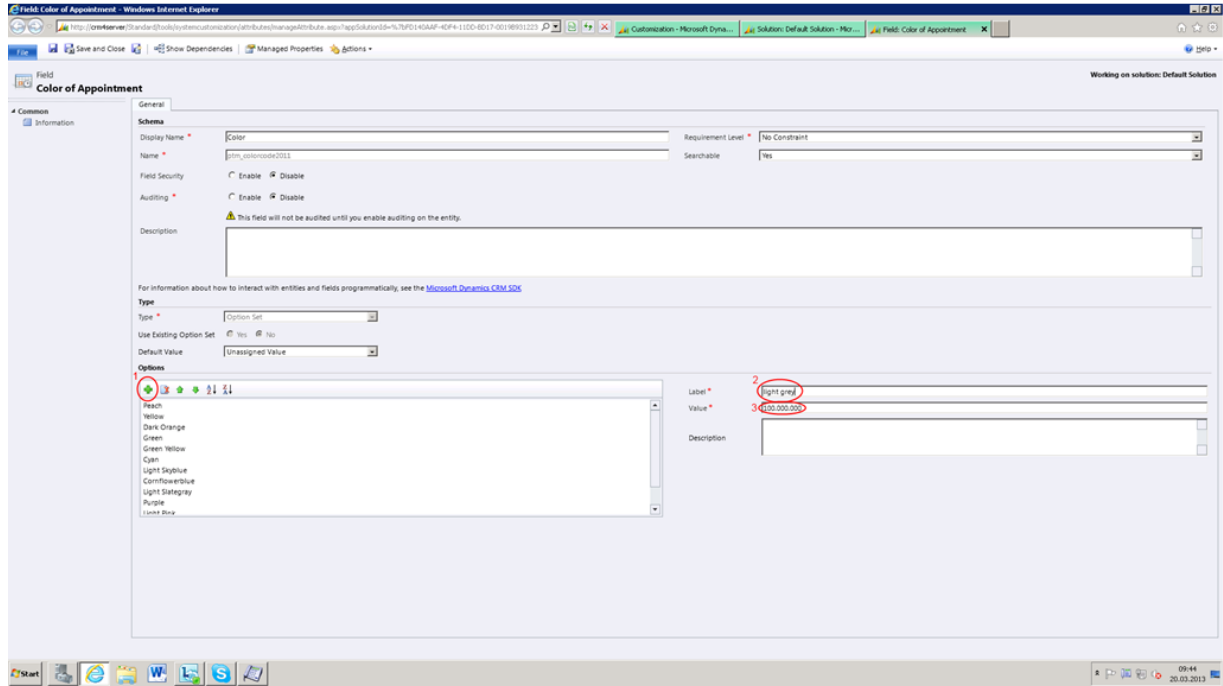


- Then, click on 'Fields' within the menu on the left (see screenshot, ellipse 1) and double-click on the field 'ptm\_colorcode2011'. (See screenshot below, ellipse 2)

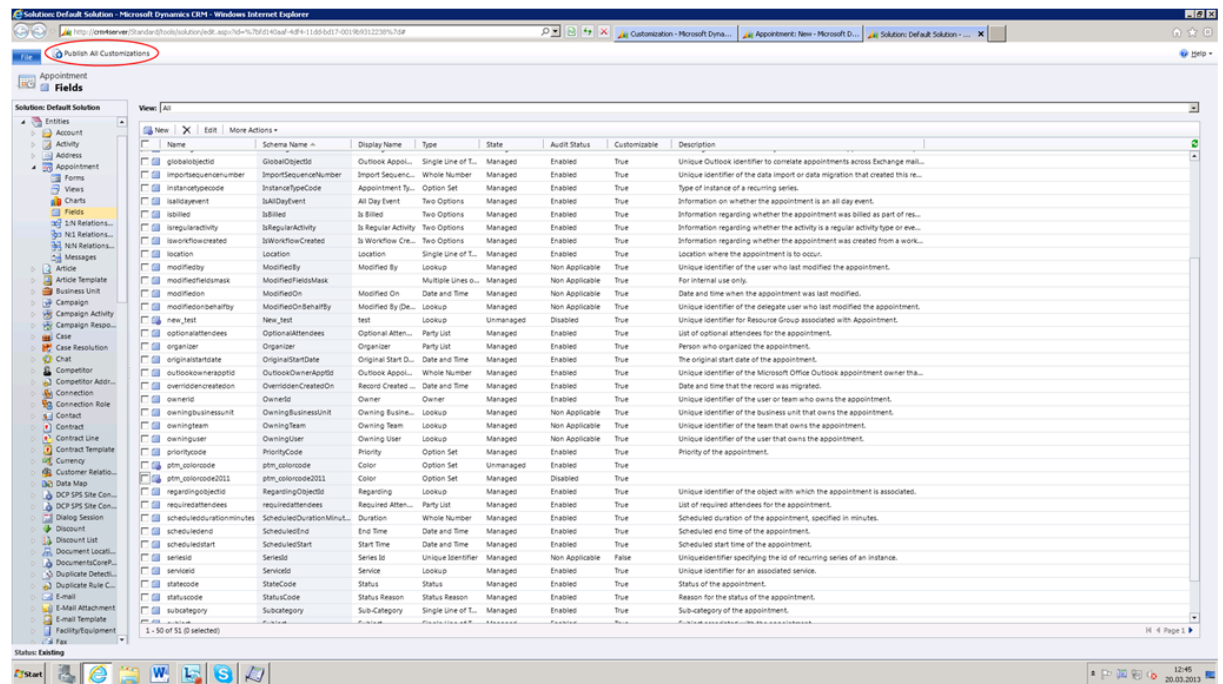




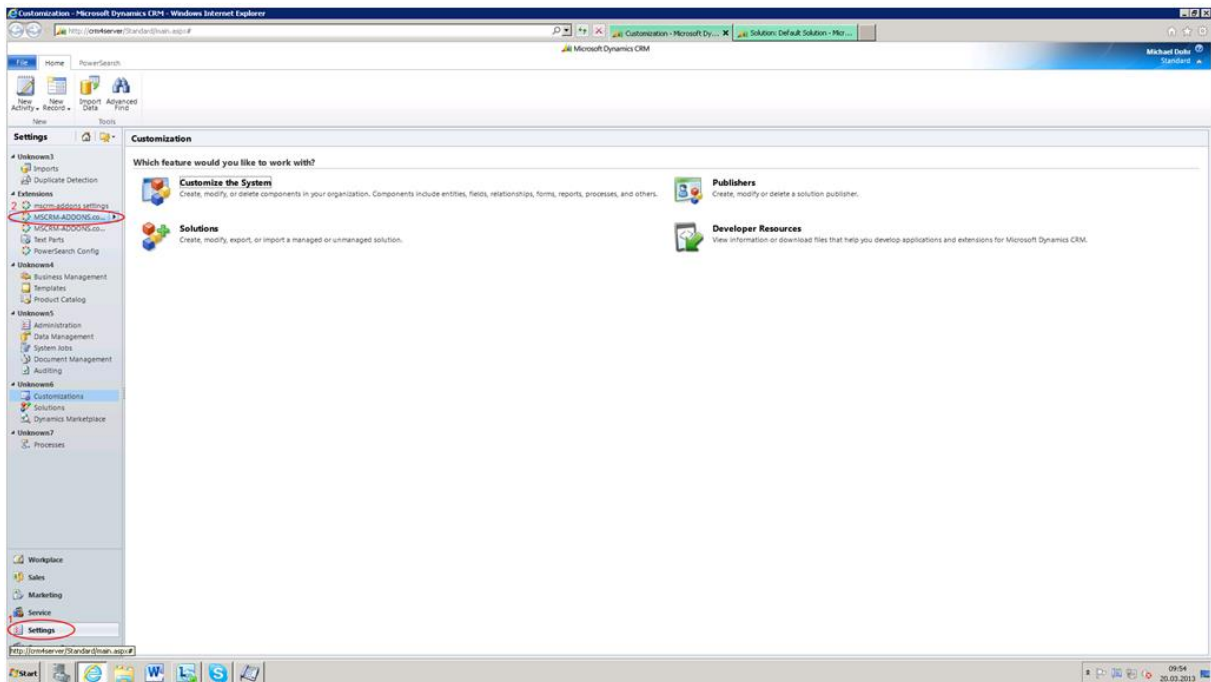
**4a.** A new window opens. Within this window, click on the green plus-sign in the 'Options'-area (see screenshot, ellipse 1) and type in the label of the color (name to be displayed within the color drop-down-menu). In our case, we type in 'light grey'. (see screenshot, ellipse 2) It is important that you remember the value of the color which is defined by your CRM system. In our case the value is 100.000.000. (See screenshot, ellipse 3)



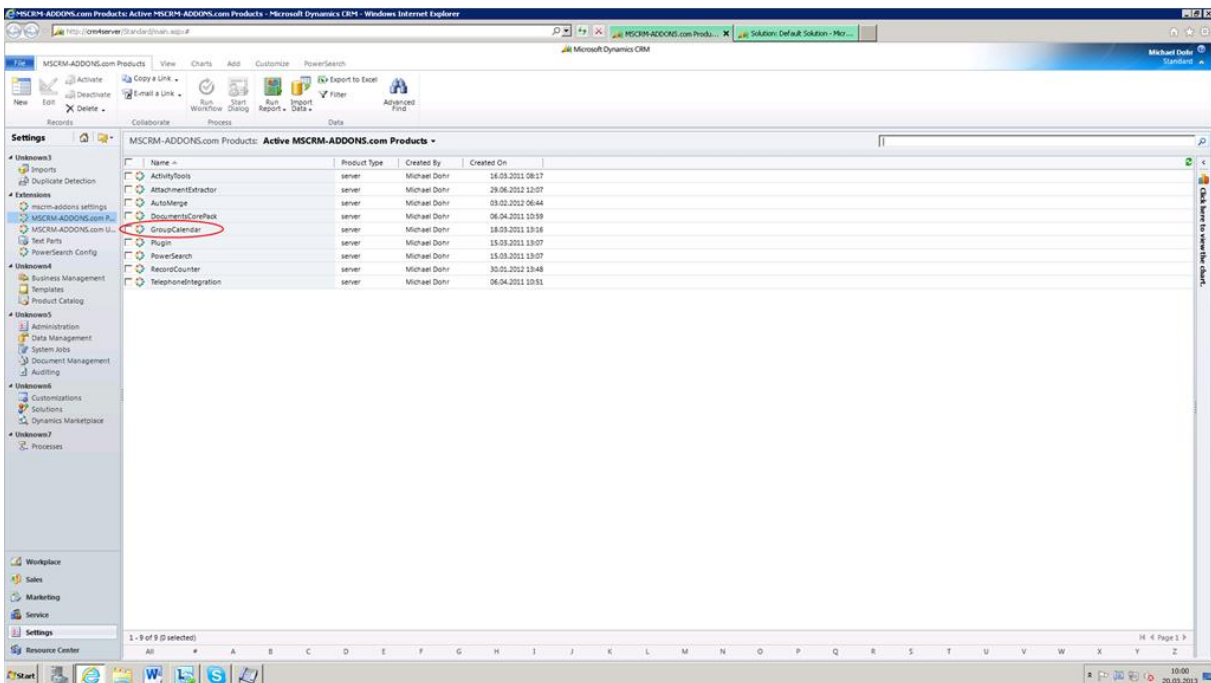
**4b.** After saving and closing, you have to publish the customization. To do so, please click on the 'Publish all Customizations'-button. (See screenshot below, red ellipse)



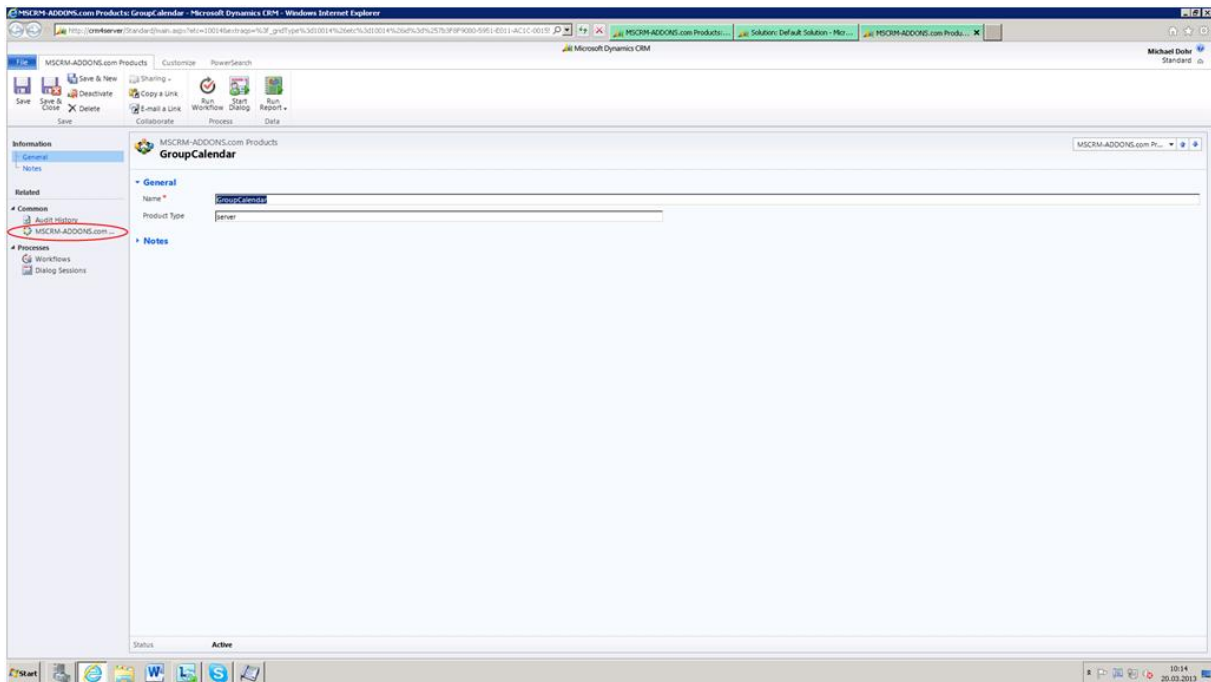
- Go back to the settings of your CRM system (see screenshot, ellipse 1) and click on 'MSCRM-ADDONS.com Products'. (See screenshot, ellipse 2)



- Afterwards, double-click on 'GroupCalendar' within the product list. (See screenshot below)



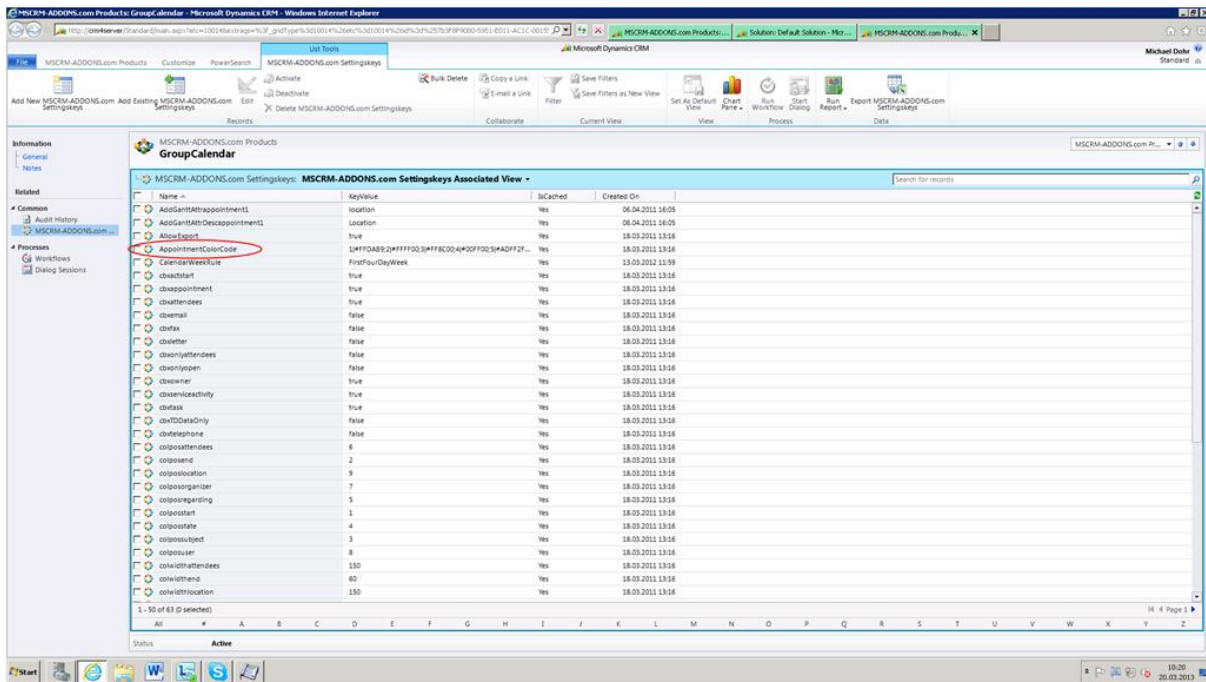
7. A new window will open. Within this window, click on 'MSCRM-ADDONS.com Settingskeys' within the menu on the left. (See screenshot below)



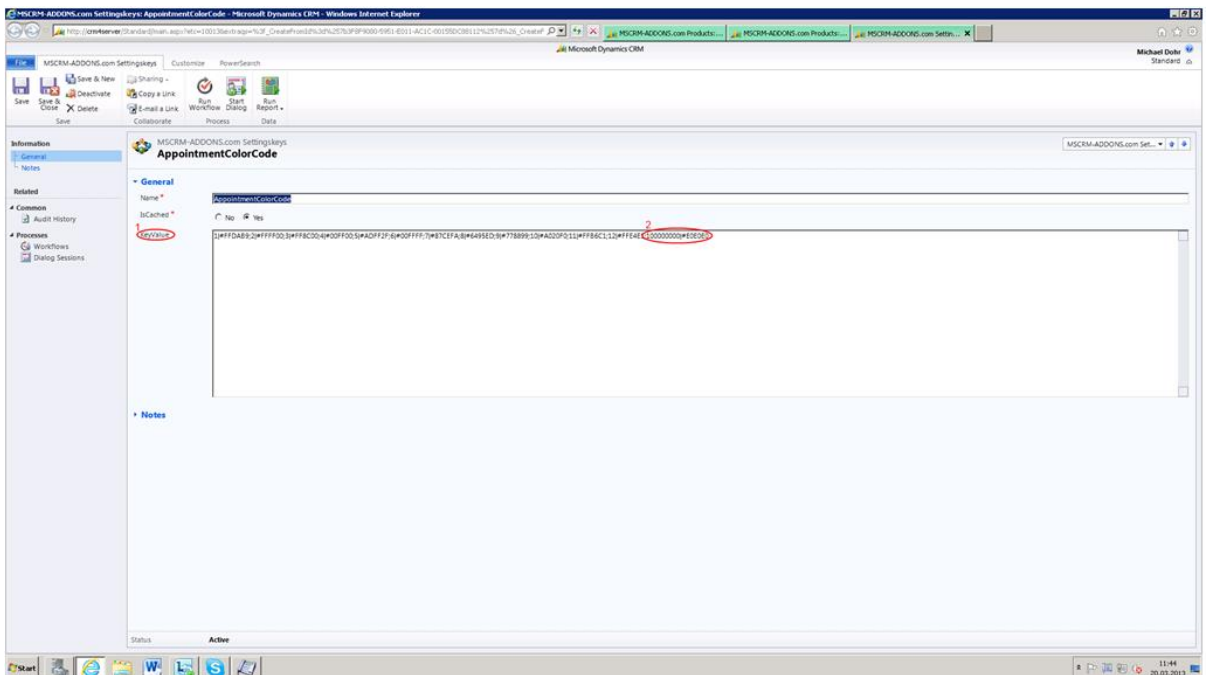
8. Then, double-click on 'AppointmentColorCode'. (See screenshot below)

**NOTE:** The procedure is the same for every color you want to add. Also, it is the same procedure for adding a new color to the color drop-down-menu within the other activity entities instead of the appointment entity (you just have to select the other activity type in step 2 and activity type color code in step 7). Following color settings exists for the different activities:

- TaskColorCode
- ServiceAppointmentColorCode
- EmailColorCode
- PhoneCallColorCode
- FaxColorCode
- LetterColorCode
- AppointmentColorCode

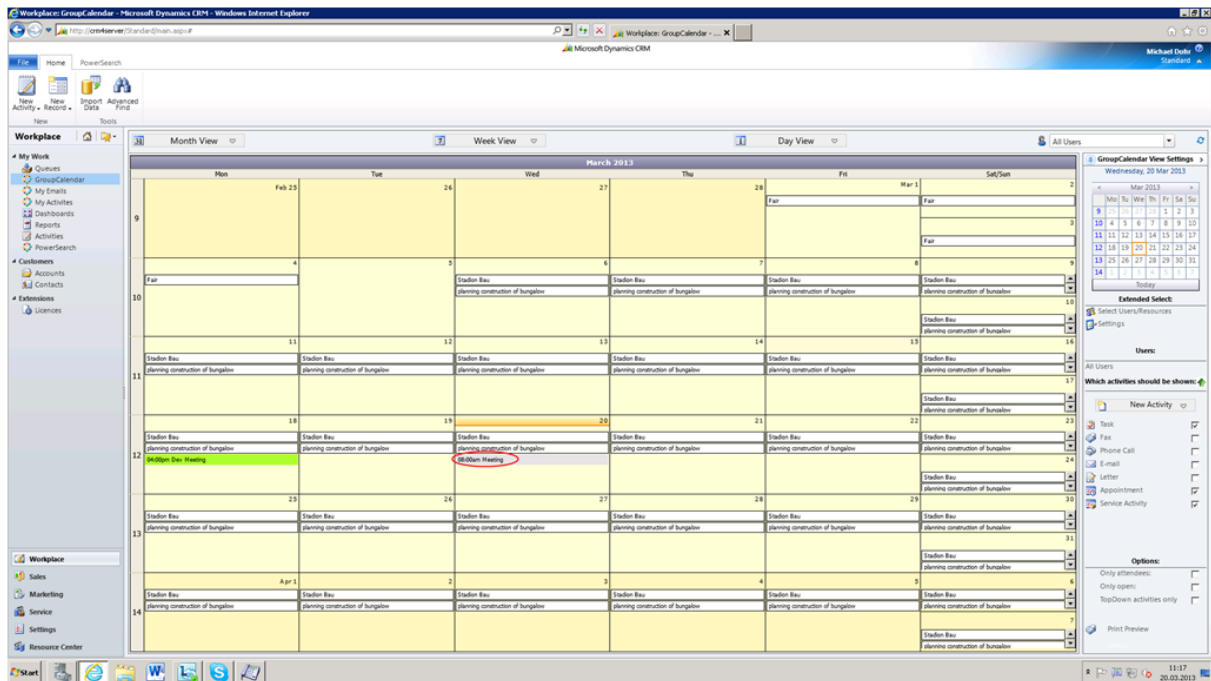
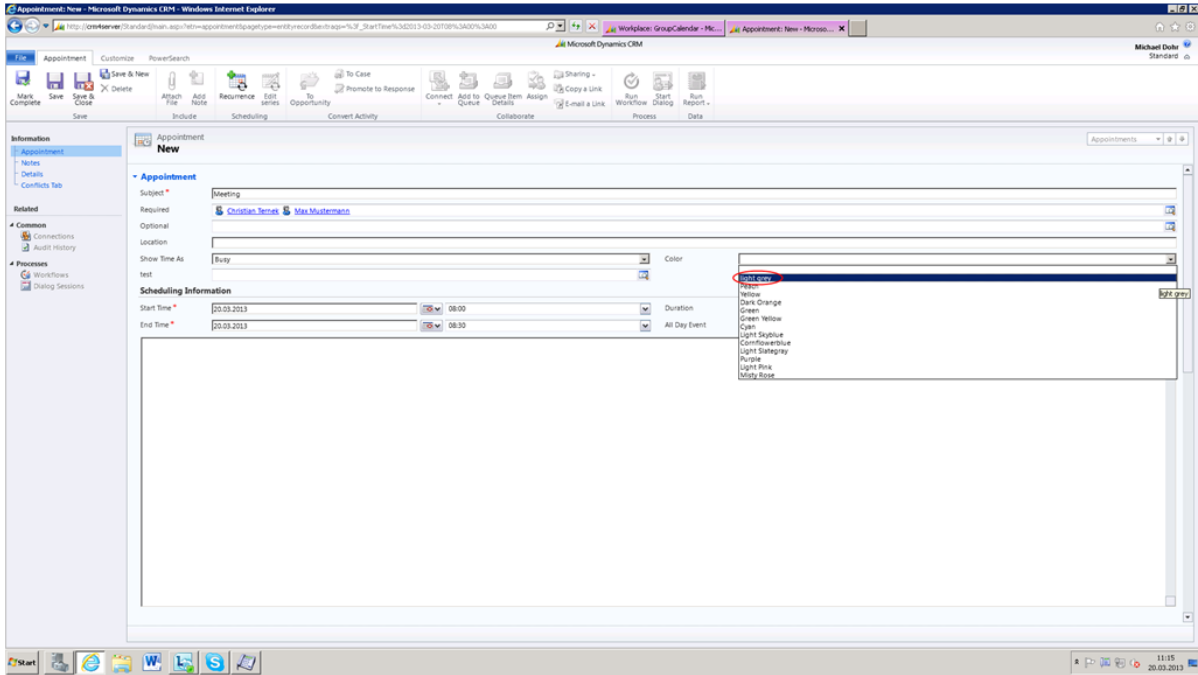


9. A new window opens. Within this window, add your color within the 'KeyValue'-area. (See screenshot, ellipse 1) To do so, you have to type in ';' followed by the value of the color defined by CRM (in our example the value was 100.000.000, please be aware that it is crucial to ignore all signs like '.' etc. when typing in the value, in our example, we type in '100000000'), by '|' and by the hex color code (in our example the hex code is #E0E0E0). (See screenshot below, ellipse 2)



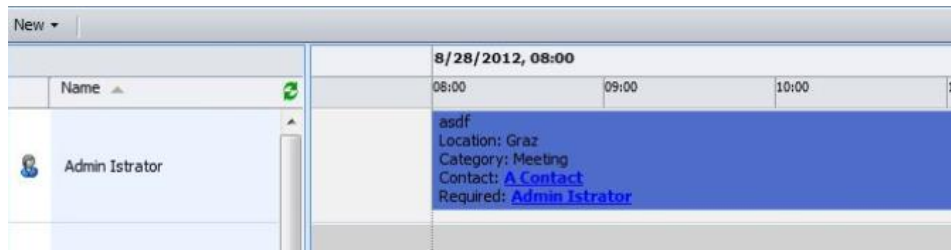


10. Click on 'Save and Close'. Now, you have to close and open the browser again or to perform an IISRESET to refresh all new settings. Afterwards, you can choose the added color (in our case 'light grey') when scheduling a new appointment from the color drop-down-menu in the appointment. The appointment will be displayed in that color. (See following two screenshots)



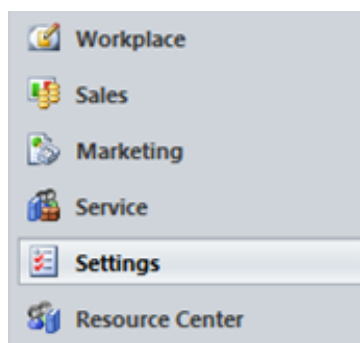
## 10.2 Gantt View: display various activity-attributes within multiple rows

This chapter explains how to configure the GroupCalendar in order to show additional activity-attributes within multiple rows in the GroupCalendar's Gantt View. Each additional attribute will be shown in a new line of an activity like in the screenshot below.

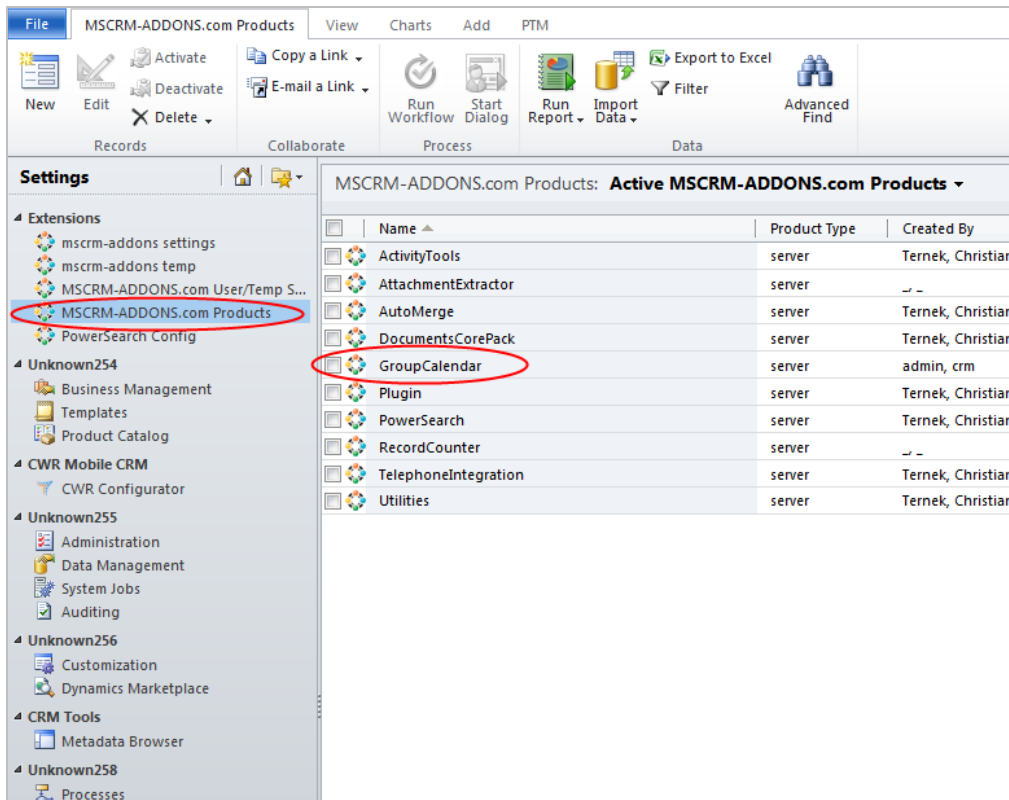


You have the possibility to configure as much lines as you like. There is no limitation. For each line, you can define a display name and the associated attribute. This is globally configured in the general GroupCalendar settings. To do so, please follow the steps described below.

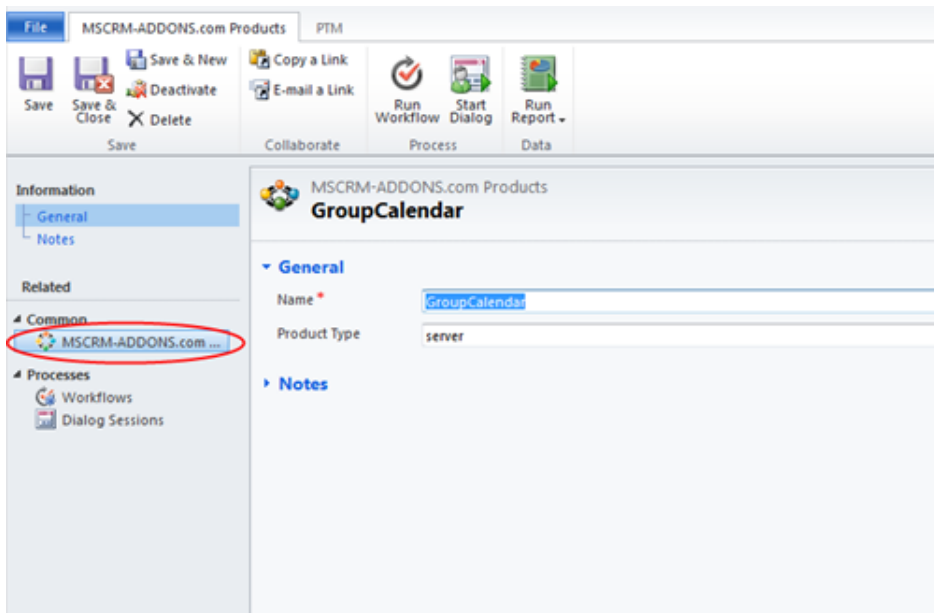
1. Open your CRM in the Internet Explorer.
2. Navigate to "Settings" within the CRM sitemap. (Menu on the left, see screenshot below)



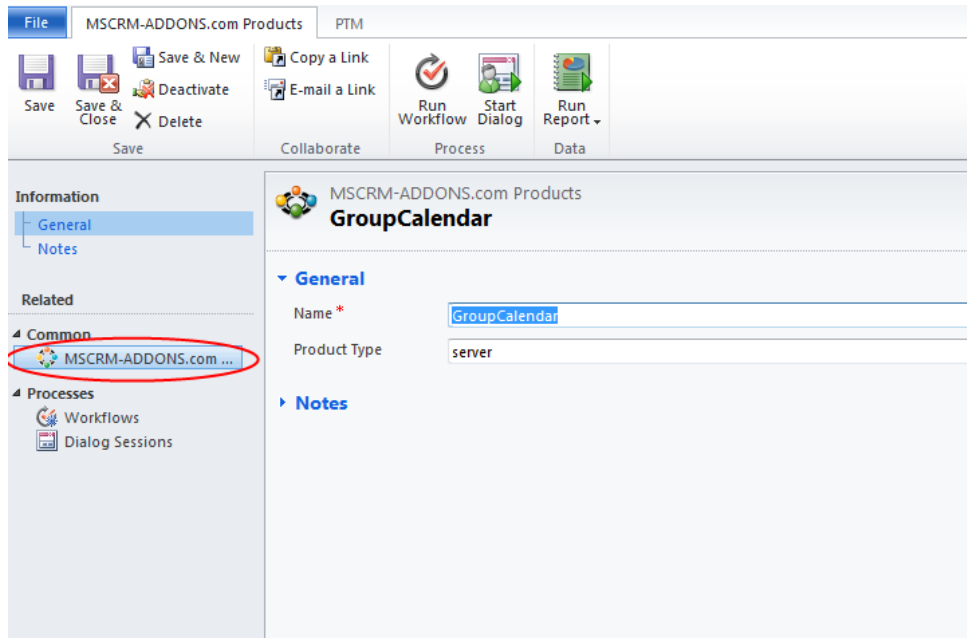
Afterwards, click on "MSCRM-ADDONS.com Products" in the CRM sitemap (see screenshot below), mark the checkbox in front of the GroupCalendar and click on "Edit" within the CRM menu at the top.



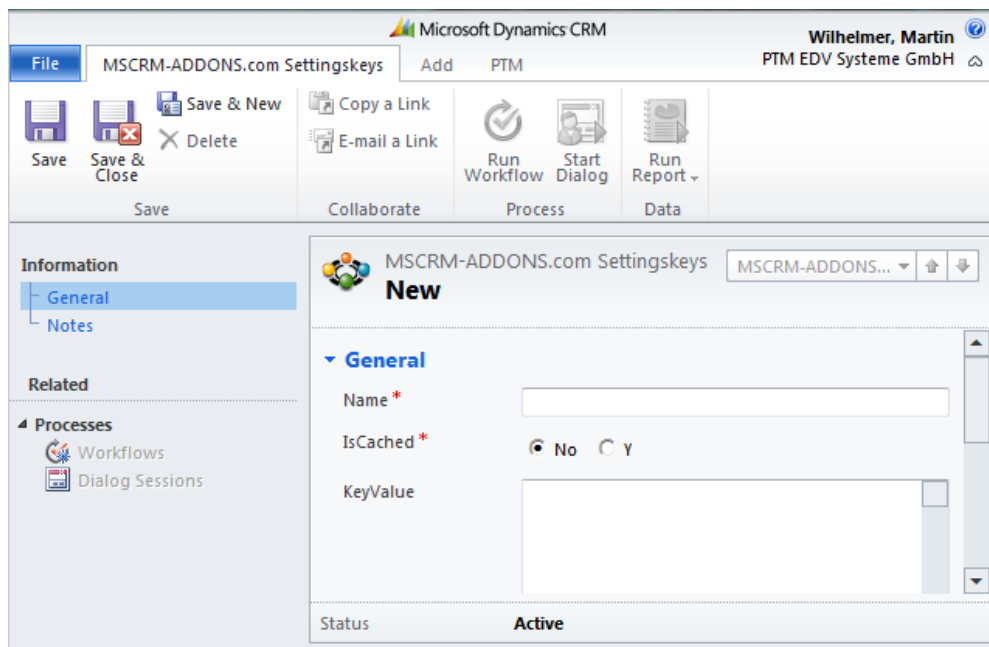
Then, the following window opens. Click on the “MSCRM-ADDONS.com Settingskeys” within the menu on the left. (See screenshot below).



- Now you have to generate a new key. To do so, click on "Add New MSCRM-ADDONS.com Settingskeys" within the CRM menu at the top. (See screenshot below)



In the following window (see screenshot below) you have to define a name of the key in the "Name"-field, to set the "IsCached"-field on "yes" and to type in a value in the "KeyValue"-field.



The syntax for the "Name"-field referring to the attribute description to be displayed is AddGanttAttrDesc[TYPENAME][LINENUMBER]. The syntax for the "Name"-field referring to the attribute to be shown is AddGanttAttr[TYPENAME][LINENUMBER]. The [TYPENAME] is the entity schema name (e.g. appointment) and the [LINENUMBER] is the line number of the attribute starting with 1. The first line will always be the subject.

Example: If you want to display an appointment entity with multiple rows, e.g. in the first row the attribute "location" with the display name "Location", in the second row the attribute "requiredattendees" with the display name "Required" and in the third row a custom attribute named "new\_contactid" with the description "Contact", you have to type in the following key-names and key-values within the settingskey-configuration-window shown in the previous screenshot.

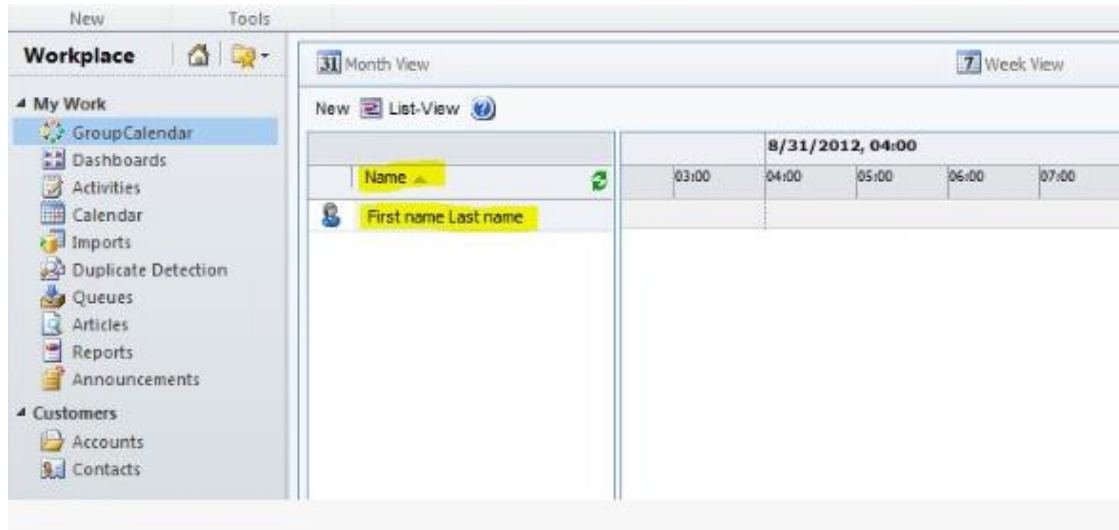
KeyName	KeyValue	Description
AddGanttAttrDescappointment1	Location	Appointment 1. line, displayname "Location"
AddGanttAttrappointment1	Location	Appointment 1. line, attribute "location"
AddGanttAttrDescappointment2	Required	Appointment 2. line, displayname "Required"
AddGanttAttrappointment2	requiredattendees	Appointment 2. line, attribute "requiredattendees"
AddGanttAttrDescappointment3	Contact	Appointment 3. line, displayname "Contact"
AddGanttAttrappointment3	new_contactid	Appointment 3. line, attribute "new_contactid"

After you have typed in the key-name and the key-value, click on "Save and Close" in the CRM menu at the top. Afterwards, start to create a new settingskey with the key-name and the key-value of the attribute or the attribute description-name you want to add next.

In addition, you have to configure in which Gantt-views you want these attributes to be displayed. This setting is named GanttMultipleLineViews. Possible values are daygantt, weekgantt and monthgantt. The settings can also be combined. If you want to e.g. display the multiple lines in the day- and week-Gantt-view, you have to type in "daygantt,weekgantt" as the value of the setting.

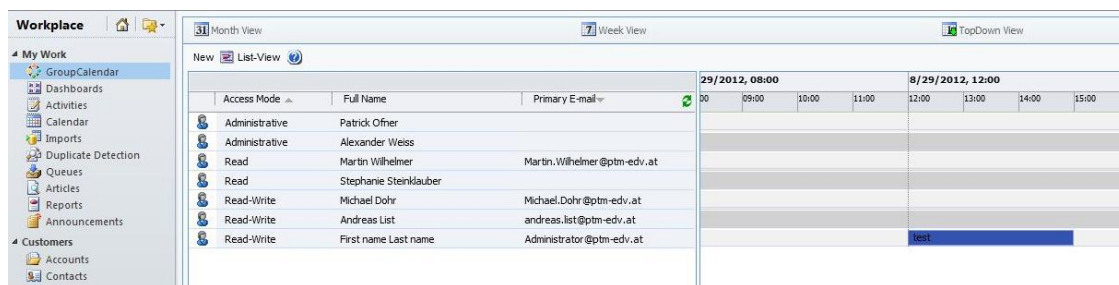
### 10.3 Gantt View: custom columns in the user list

With GroupCalendar you have the possibility to customize the user pane of the Gantt view. Per default only the fullname of the system user is shown. Please see screenshot for example.

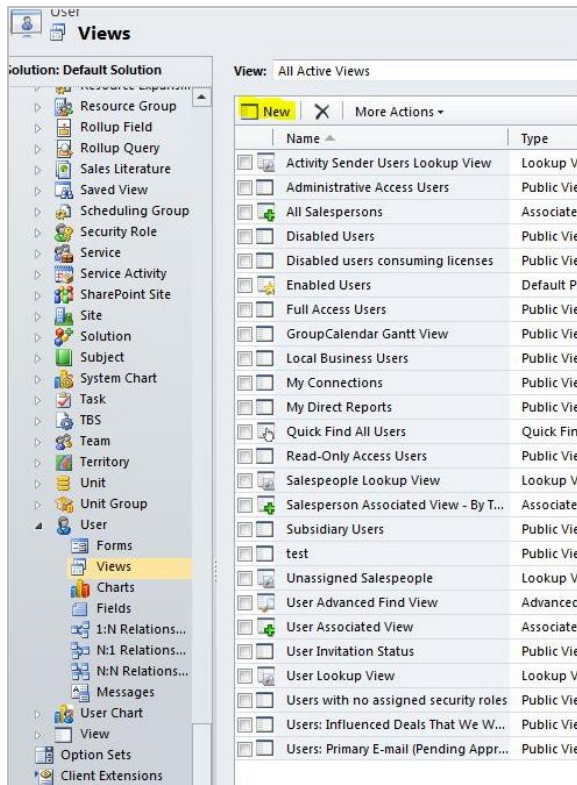


With the new feature you're able to customize the columns which will be shown here. You're able to define the **columns, column widths** and also the **sorting**.

In this example we've modified the view to show the **Access Mode, Full Name** and **Primary E-mail**. Sorted by Access Mode ascending and then by **Primary E-Mail** descending.

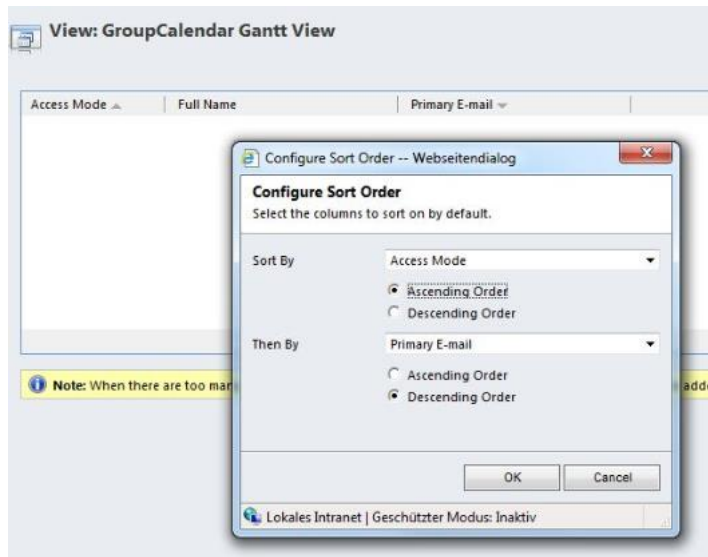


To define this view, go within CRM to Settings -> Customizations -> Customize the system -> Select Systemuser -> Views and create a new view.



Here you could define your view. Define the columns you need, specify the width of each column and also the sorting.

After you saved the view don't forget to publish the customization!

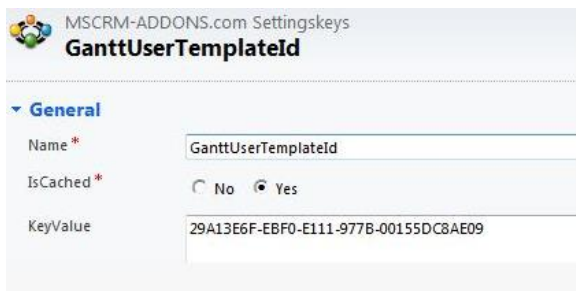


What you would need now, is the unique ID of the new created view. You could find it in the address bar:

http://crm2011r3:5555/alist/tools/vieweditor/viewManager.aspx?appSolutionId=%7bFD140AAF-4DF4-11DD-BD17-0019B9312238%7d&entityId=%7b60696D5D-4D78-4712-B4E0-6CBEF3DF4906%7d&id=%7b**29A13E6F-EBF0-E111-977B-00155DC8AE09**%7d

After that modify the global GC settings. For details have a look [here](#).

Create a new setting named **GanttUserTemplateId** and as the KeyValue the ID of the newly created view. Please also select **IsCached** = Yes



MSCRM-ADDONS.com Settingskeys  
**GanttUserTemplateId**

**General**

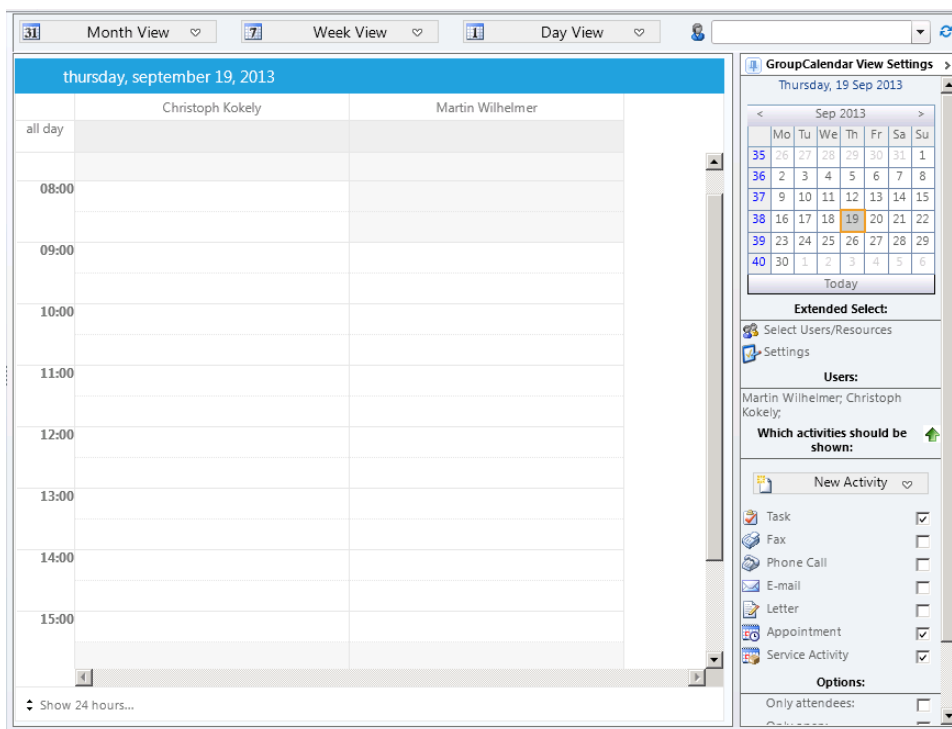
Name \* GanttUserTemplateId

IsCached \*  No  Yes

KeyValue 29A13E6F-EBF0-E111-977B-00155DC8AE09

## 10.4 Show Working Hours and Time-Off

Within CRM 2011, it is possible to specify working hours and time-off (e.g. vacation) for each user and resource. With GroupCalendar it is now possible to show these working hours and the time-off.



Month View Week View Day View

thursday, september 19, 2013

all day Christoph Kokely Martin Wilhelm

08:00

09:00

10:00

11:00

12:00

13:00

14:00

15:00

Show 24 hours...

**GroupCalendar View Settings**

Thursday, 19 Sep 2013

Sep 2013

Mo	Tu	We	Th	Fr	Sa	Su
35	26	27	28	29	30	1
36	2	3	4	5	6	7
37	9	10	11	12	13	14
38	16	17	18	19	20	21
39	23	24	25	26	27	28
40	30	1	2	3	4	5

Today

**Extended Select:**

- Select Users/Resources
- Settings

**Users:**

Martin Wilhelm; Christoph Kokely;

**Which activities should be shown:**

New Activity

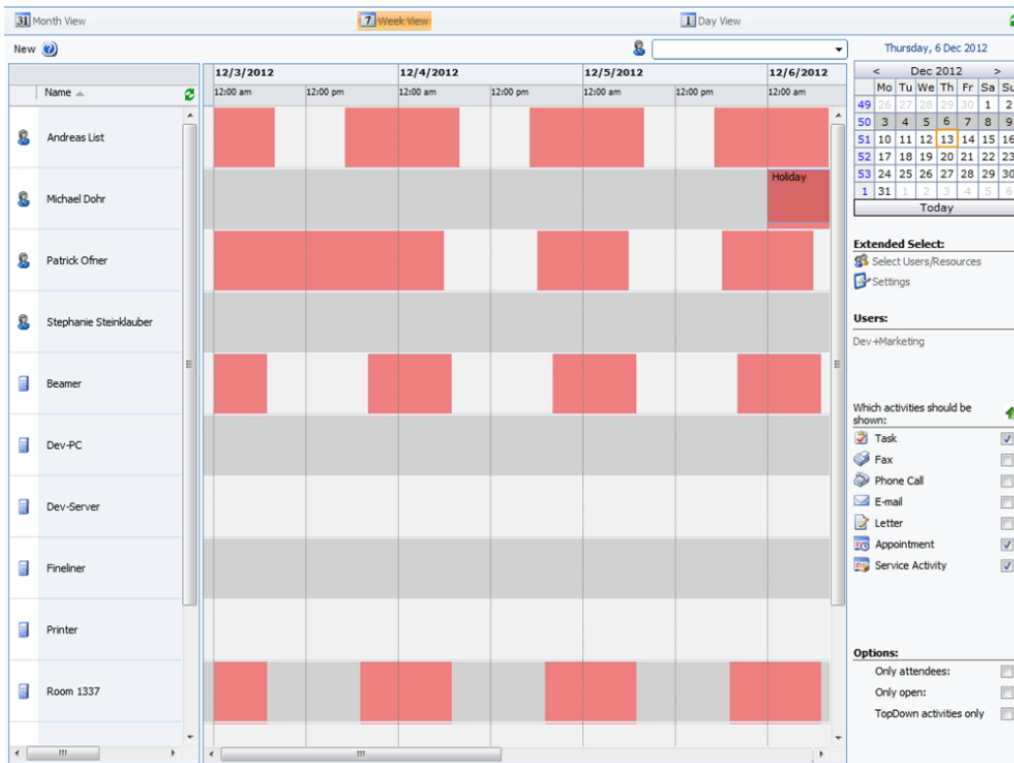
- Task
- Fax
- Phone Call
- E-mail
- Letter
- Appointment
- Service Activity

**Options:**

- Only attendees:

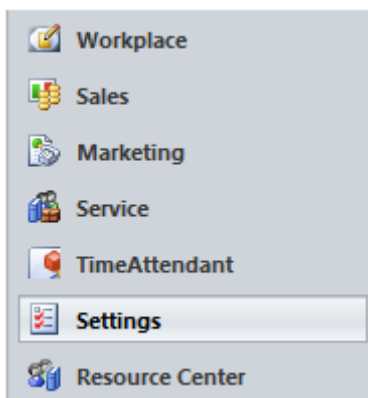


The Screenshot below shows working-hours and time-off for users and resources in Gantt View

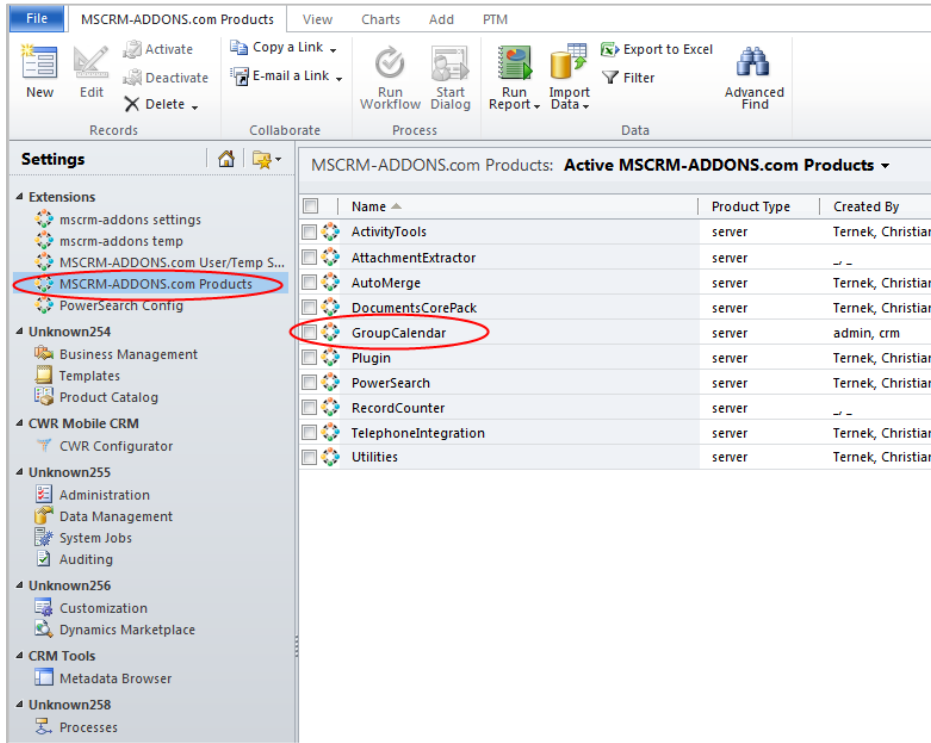


Per default, this feature is not enabled because it has a slight performance impact on loading the views. To enable this functionality, please follow the steps below.

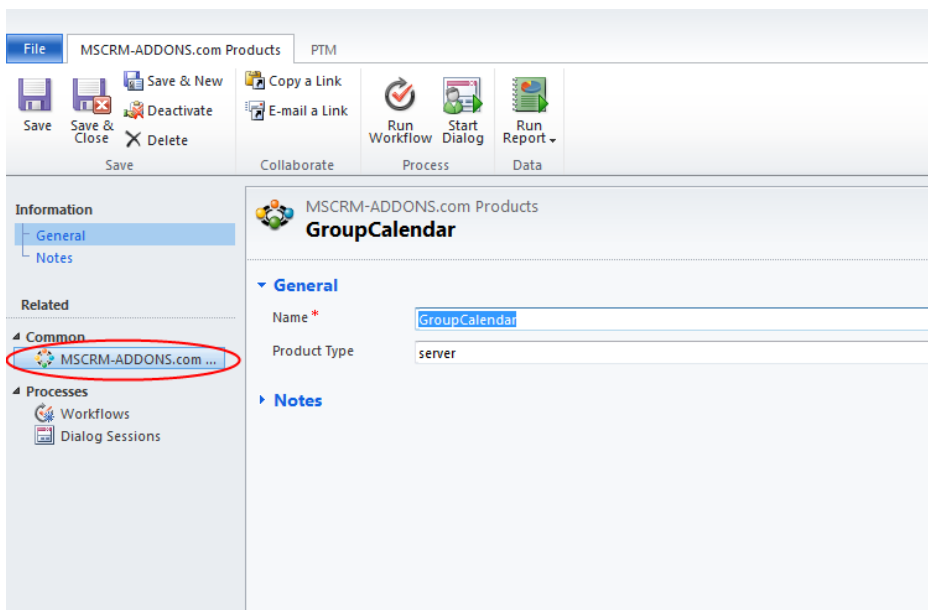
1. Open your CRM in the Internet Explorer
2. Navigate to "Settings" within the CRM sitemap (menu on the left, see screenshot below)



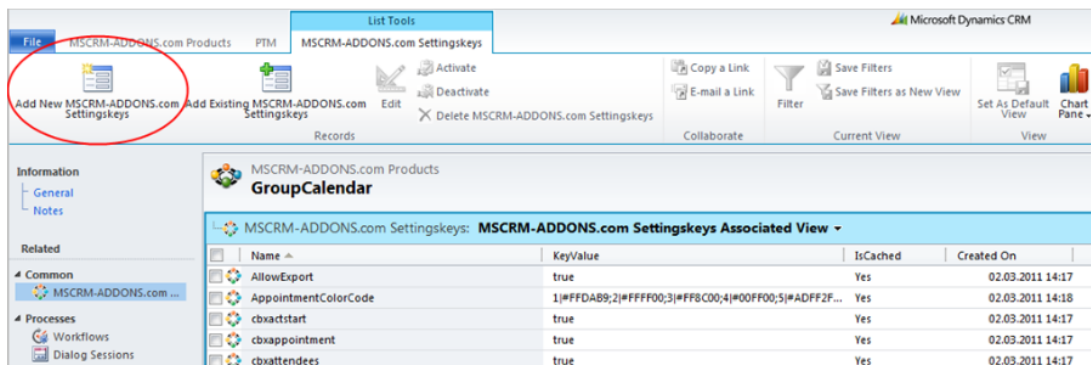
Afterwards, click on "MSCRM-ADDONS.com Products" in the CRM sitemap (see screenshot below), mark the checkbox in front of the GroupCalendar and click on "Edit" within the CRM menu at the top.



Then, the following window opens. Click on the "MSCRM-ADDONS.com Settingskeys" within the menu on the left. (see screenshot below)



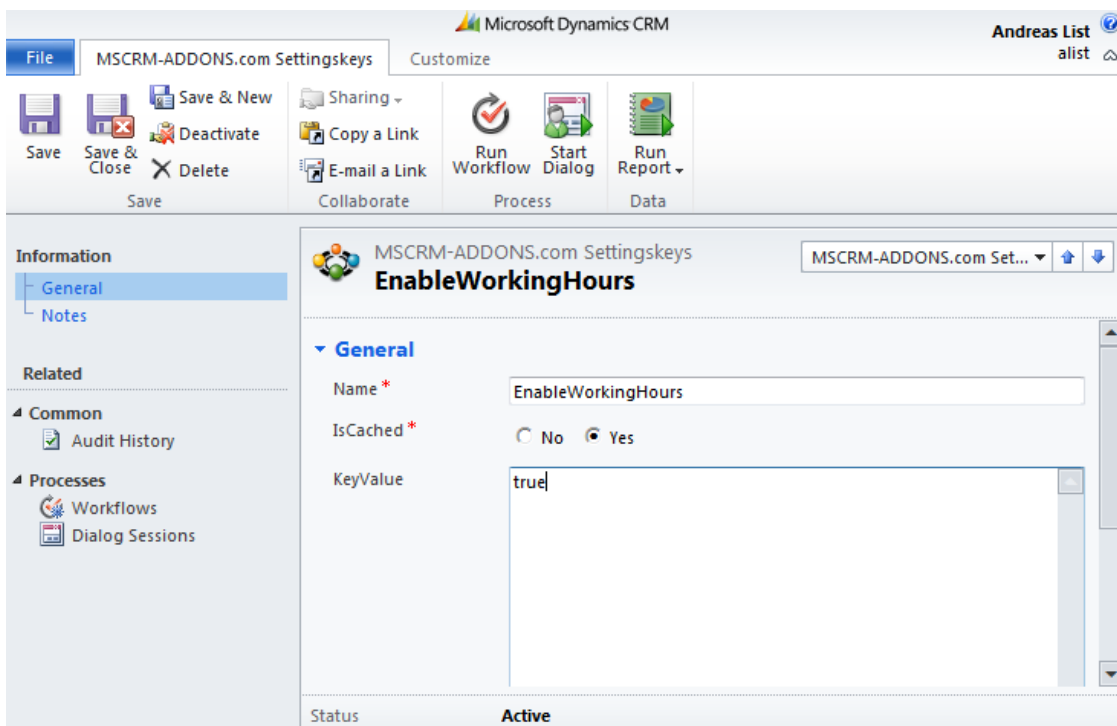
- Now you have to generate a new key. To do so, click on "Add New MSCRM-ADDONS.com Settingskeys" within the CRM menu at the top. (See screenshot below)



Screenshot: "Add MSCRM-ADDONS.com Settingskeys"-button in CRM menu at the top

In the following window (see screenshot below) you have to define a name of the key in the "Name"-field, to set the "IsCached"-field on "yes" and to define a value in the "KeyValue"-field. Type in the following:

Name: **EnableWorkingHours**  
 IsCached: **Yes**  
 KeyValue: **true**



After you have typed in the values, click on "Save and Close" in the CRM menu at the top. To apply the changes, you have to run an IISRESET on the CRM server. Optionally, you can restart the GroupCalendarServer Application Pool within IIS on the CRM server.

---

## 11 Contact

If you have questions to the product send an Email to  
[support@mscrm-addons.com](mailto:support@mscrm-addons.com)  
or visit our blog  
<http://blogs.mscrm-addons.com>

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