



INSTALLATION GUIDE

WAVEXTEND CALCULATION FRAMEWORK 2011 & ONLINE

Dynamics CRM 2011

COPYRIGHT

Information in this document, including URL and other Internet Web site references, is subject to change without notice. Unless otherwise noted, the companies, organizations, products, domain names, e-mail addresses, logos, people, places, and events depicted in examples herein are fictitious. No association with any real company, organization, product, domain name, e-mail address, logo, person, place, or event is intended or should be inferred. Complying with all applicable copyright laws is the responsibility of the user.

Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Wavextend B.V.

As the software licensee, you may make reasonable customizations to the software online help documentation for your internal use only. You are solely responsible for and bear any and all liability relating to any customizations you make. This includes any adverse effect that your customizations have on any functionality of the licensed software, the software documentation itself or otherwise relating to use of your customizations. Please note that installing software upgrades may rewrite customized online help files.

Wavextend may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document.

Except as expressly provided in any written license agreement from Wavextend, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

VERSION

This version is 1.1 of the installation Guide for Wavextend Calculation Framework for Dynamics CRM 2011 & Online.

In case you have remarks, preferably constructive feedback, on this guide. Please send a mail to its authors at userguide@wavextend.com

The latest version of this guide will be published on the Wavextend website. People who send feedback will be automatically notified of the availability of new versions until an unsubscription request is received.



TABLE OF CONTENT

Copyright	2
Version	3
Introduction	5
Installation	6
Install The Solution packages	6
Install A License	9
Provision your CRM	12

INTRODUCTION

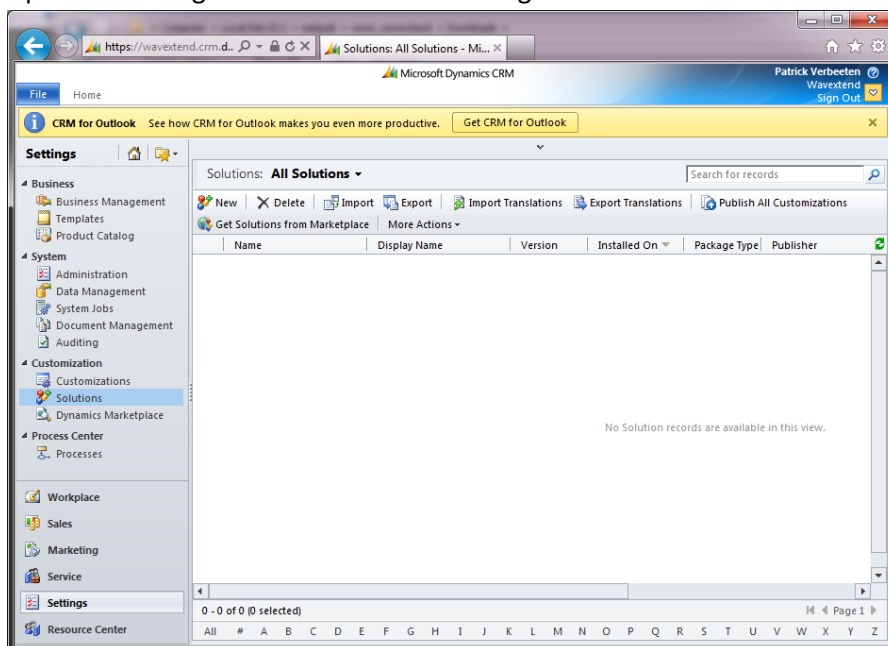
This guide provides the basic installation instructions how to install the Wavextend Calculation Framework for CRM 2011 & Online.

INSTALLATION

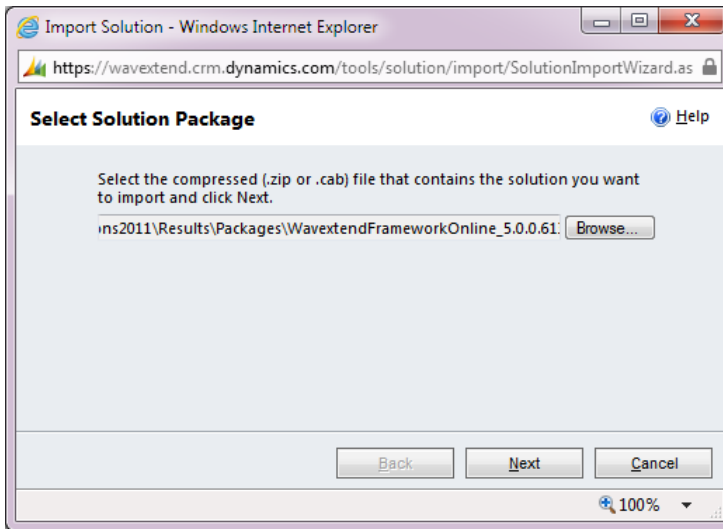
To install the Wavextend solutions you must have sufficient privileges. It is recommended that you are a system administrator with Full access when installing the on-premise or online version. A user with an administrative license will not be able to install the licenses. To install the on-premise version you must be a deployment administrator. This privilege can be granted by login on to the server hosting CRM and starting the CRM deployment administrator. In case you have previous versions of Wavextend Calculation Framework installed or Wavextend ImageControl, please contact support@wavextend.com prior to installation for further instructions.

INSTALL THE SOLUTION PACKAGES

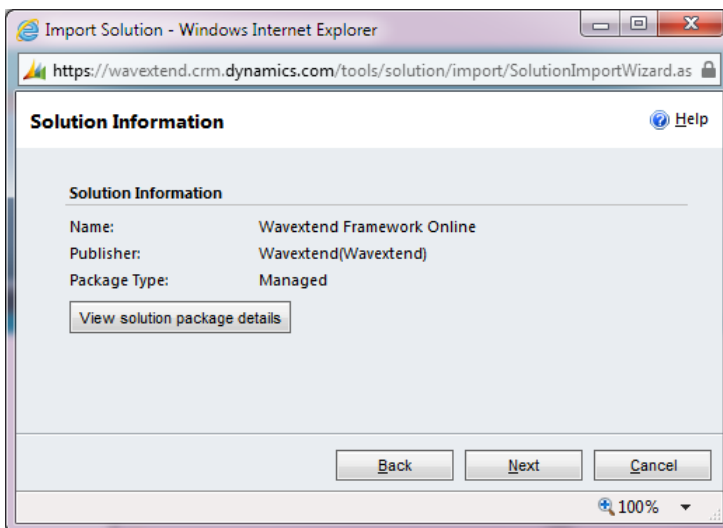
1. If you have not done so already you can download the installation files from the Wavextend Partner & Customer area. This package contains three solutions and supporting documentation.
2. After you have downloaded the package unzip file.
3. Open CRM and go to solutions in the settings area



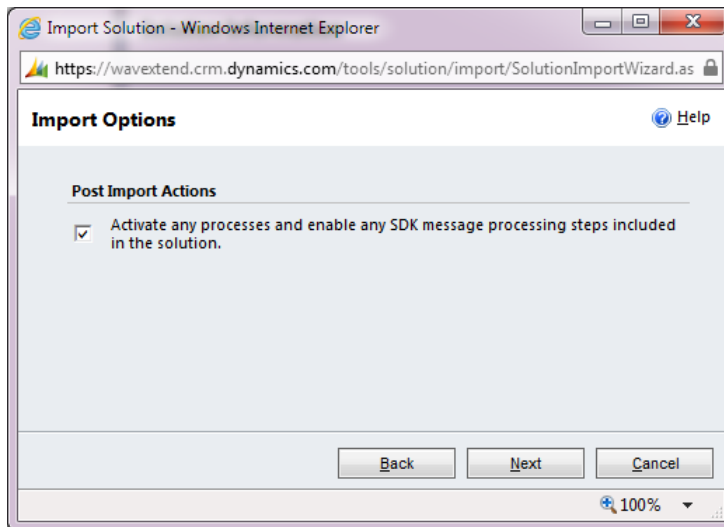
4. Click on Import
5. Click on Browse and select the first package. Depending on your CRM version this will be WavextendFramework_[version].zip or WavextendFrameworkOnline_[version].zip. Then click Next



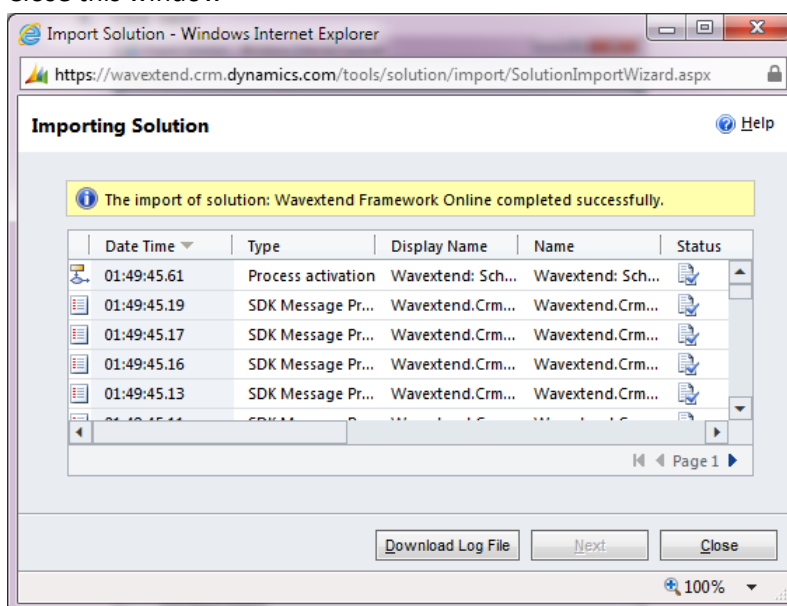
6. Click next



- In the next dialog ensure the box 'Activate any process ...' is checked and click next



- Wait for the process to complete.
- After the import has completed the results are shown. Depending on the package and environment it is some warnings occur, this is normal behaviour.
Close this window

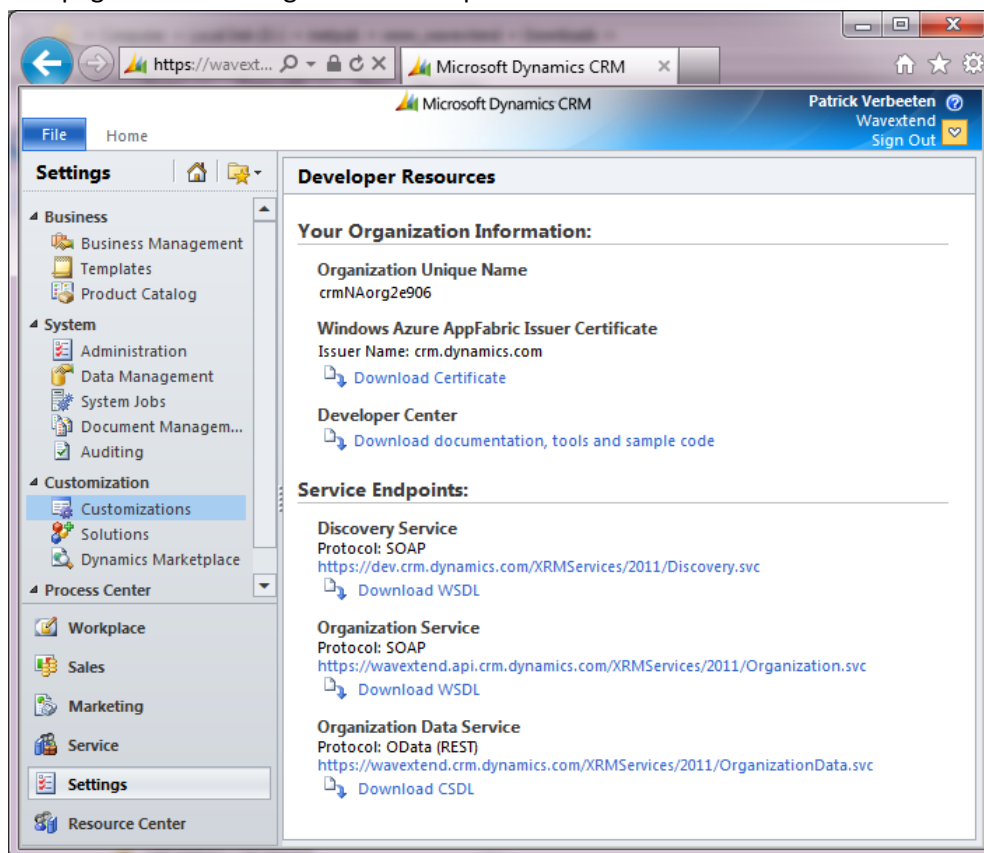


- Repeat steps 4 through 9 for the second package. Depending on your CRM version this will be WavextendCalculationBase_[version].zip
- Repeat steps 4 through 9 for the third package. Depending on your CRM version this will be WavextendCalculationFramework_[version].zip or WavextendCalculationFrameworkOnline_[version].zip

INSTALL A LICENSE

For the Wavextend calculation framework to work a license must be installed. This license is specific for your CRM environment and version of CRM. To request a license you will need the Unique name of your CRM organisation. To find this:

- Open CRM
- Go to the settings area
- In the left navigation select customizations
- Select Developers Resources
- This page shows the Organisation Unique Name:

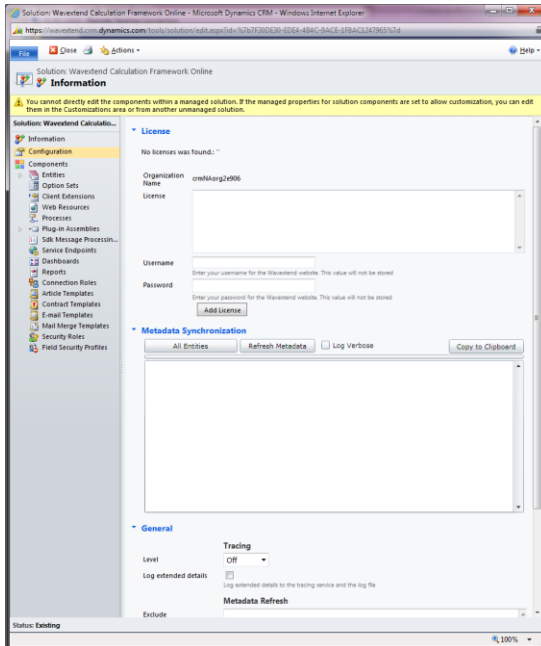


With the organisation name you can request a license. For more information go to the partner area of the wavextend website.

To install the license follow the procedure below.

Note: this requires an active internet connection. If your server cannot access the internet please use the alternate procedure below.

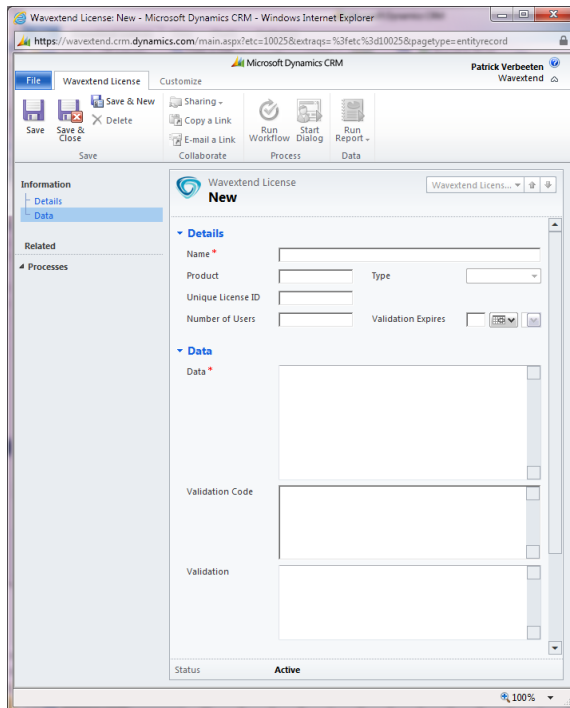
1. Open CRM
2. Go to the settings area and select solutions
3. Click on the Wavextend Calculation Framework (Online) Solution .
This will open the configuration page:



4. If no Wavextend licenses are installed the license are will be expanded. Otherwise click on the License Header
5. The unique name of the organization is shown here as well.
6. Copy/paste the license you have received in the License text box. (The license starts with MYAA)
7. Enter your username and password for the Wavextend Partner & Customer Area
8. Click on Add License
This will contact the Wavextend Server and validate your license.

Alternate procedure to install a license without internet connection on the server

1. Open CRM
2. Go to the settings area and select Wavextend Licenses
3. Click New



4. In the form (see right side of this page) copy/paste the license you have received into the data text box. (The license starts with MYAA)
5. Save the record
This will generate a validation code
6. Open a new browser and go to the Wavextend website (www.wavextend.com)
7. Go to the partner area and login
8. Go to the license validation page
9. Copy/Paste the validation code (second text box from the CRM form; starts with MwQA) in the website.
10. Copy/Paste the validation (from the website ; starts with MoAA) into the crm form (bottom text box).
11. Save the record.

PROVISION YOUR CRM

Before you can use the Wavextend Calculation Framework you must refresh the metadata copy so this can be used for the configuration of calculated attributes.

If you make any changes to the CRM metadata by adding new entities or attributes or changing existing entities or attributes you must refresh the metadata, to do so repeat this procedure.

1. Open CRM
2. Go to the settings area and select solutions
3. Click on the Wavextend Calculation Framework (Online) Solution.
4. Under the Metadata Synchronization heading you can refresh the meta data
5. Click on the Refresh Metadata button to start.
This process will take a long time to complete, do not close the page or navigate away as this will abort the process. If you do this the metadata copy will be incomplete, if this happens repeat this procedure.

The Wavextend Calculation Framework is now ready for use.

WORK HOURS/DAYS FUNCTIONS (ON-PREMISE ONLY)

To use the expressions for work hours and days several SQL functions must be added to the CRM server. This is only required for the on-premise edition.

- Open SQL Management Studio
- Connect to the CRM database server
- Open the file “WorkdaysFunctions.sql” from the installation package.
- From the “Query” menu select the option “SQLCMD Mode”
- On the first line replace CRM_MSCRM with the name of one* of the CRM Database
- Execute the script
If you receive the error “Incorrect syntax near ':'.” You need to enable “SQLCMD Mode” from the “Query” menu.

*A CRM database must be specified to be able to access the time zone rules. This is a static table and is not organization dependent.

The required functions are created in the master database. This allows all organizations sharing the CRM database server to access these functions. This script only needs to be executed once per CRM database server.

