AvePoint® User Guide

AvePoint Timeline Enterprise 1.0.2 for Microsoft Dynamics® CRM

Installation and Configuration Guide

Revision B

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About AvePoint Timeline Enterprise

AvePoint Timeline Enterprise for Microsoft Dynamic CRM empowers business users to be more productive when preparing for customer interaction on the go. Timeline displays all activities in a consolidated interface, providing quick and easy ways to add annotation and display a combined view of relevant information pertaining to any Account, Lead, Contact, Campaign, Case, and Opportunity.

AvePoint Timeline Enterprise supports Microsoft Dynamics CRM 2013 (Online and On-Premises) and Microsoft Dynamics CRM 2011 (Online and On-Premises).

Required Permissions

To install and use Timeline Enterprise Solution properly, ensure that the permission requirements are met:

- The user who imports Timeline Enterprise Solution to Microsoft Dynamics CRM has the **System Administrator** security role for Microsoft Dynamics CRM.

- The user who uses Timeline for Microsoft Dynamics CRM has the **AvePoint Timeline Enterprise User Account** security role for Microsoft Dynamics CRM.

- The user who manages AvePoint Timeline Profiles has the permissions below:

    - **Read** permission to Entity, Field, Relationship, System Form, View, and Web Resource.

    - **Read** and **Write** permissions to AvePoint Timeline Configuration.

    - **Create**, **Read**, **Write**, **Delete**, **Assign**, and **Share** permissions to AvePoint Timeline Profile.

    - **Create**, **Read**, **Write**, **Delete**, and **Append** permissions to AvePoint Timeline Starred Record.

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Overview of Installation and Configuration

To properly install and configure AvePoint Timeline Enterprise for Microsoft Dynamics CRM, the following steps must be performed in this order. Click the link to jump to the corresponding section.

1. Importing the Timeline Enterprise Solution

2. Registering a License

3. Creating a Profile

4. Editing Profile

5. Configuring the Security Role

6. Install Timeline on your desired devices (iPhone, iPad, Android ™ phone, Windows 7 Operating System, or Windows 8 Operating System).

    - For installation onto a Windows 7 system, see Installing Timeline on a Windows 7 Operating System.

    - You can install Timeline on the iPhone, iPad, Android phone, and Windows 8 Operating Systems through your system or device app store.

After you complete the steps above, Timeline will use the AvePoint Timeline Profile you configured in Dynamics and load the entities and activities. If the steps above are not configured, Timeline will use its default settings.

The following steps are optional:

1. [Optional] If desired, configure the **Star** and **Open in Timeline** settings. Refer to the Configuring "Star" and "Open in Timeline" Settings section for details.

2. [Optional] You can modify the recurrence of Starred Records Bulk Delete jobs. Refer to The Starred Records Bulk Delete Job section for details.

Importing the Timeline Enterprise Solution

The Timeline Enterprise Solution must be imported into Dynamics before any of its functionality can be leveraged. Follow the steps below to import the Timeline Enterprise Solution into Microsoft Dynamics CRM 2011.

1. Log onto Microsoft Dynamics CRM 2013/2011.

   *Note: The user who logs onto Microsoft Dynamics CRM 2013/2011 must have the **System Administrator** security role for Microsoft Dynamics CRM.

2. Navigate to **Settings** > **Customization** > **Customizations** > **Solutions**.

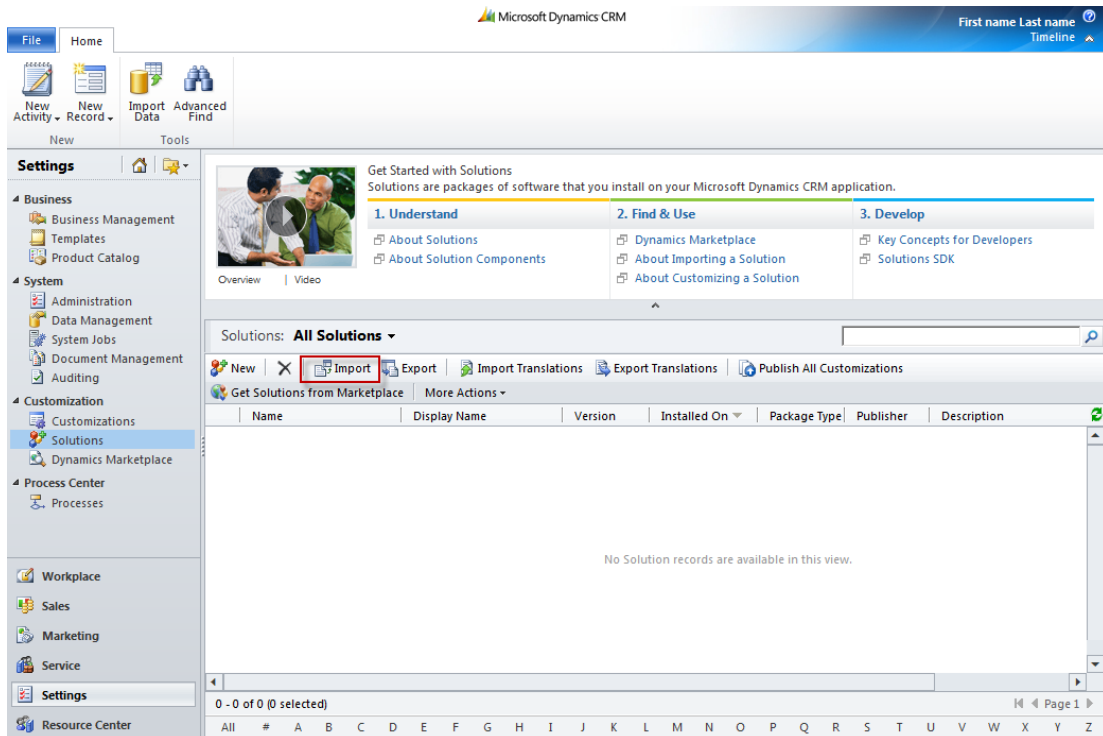3. Click **Import** to import the solution. The **Select Solution Package** pop-up window appears.

Figure 1: Click Import to import the solution (Dynamics CRM 2011 environment shown).

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4. In the **Select Solution Package** pop-up window, click **Browse**. Select the **AvePoint_Timeline_Enterprise_Managed_Serial_Number.zip** file that contains the solution.
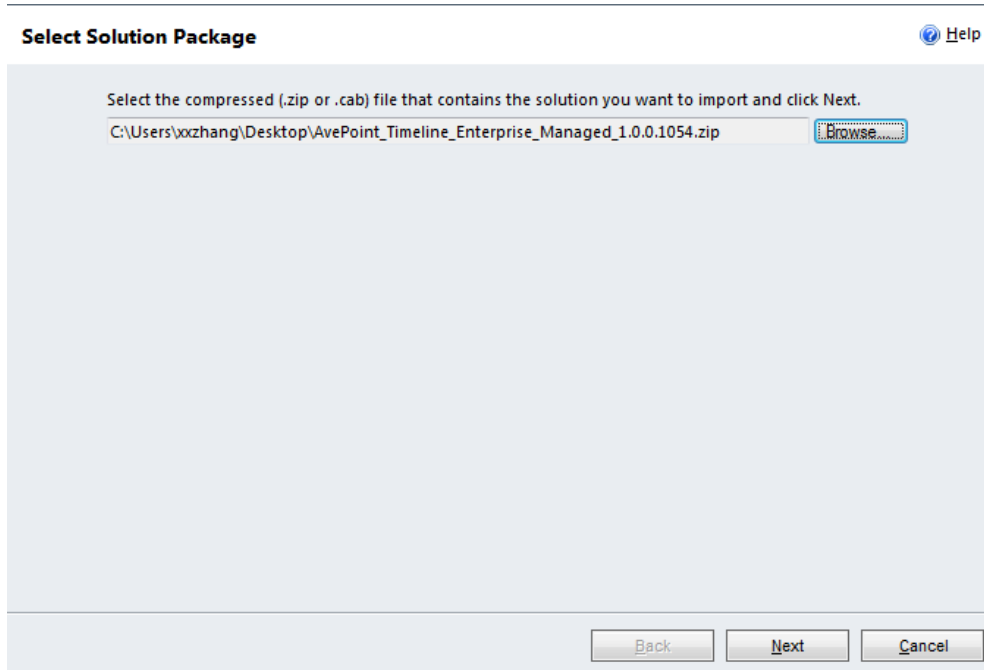

Figure 2: The Select Solution Package pop-up window (Dynamics CRM 2011 environment shown).

5. Click **Next**. The **Solution Information** page appears.

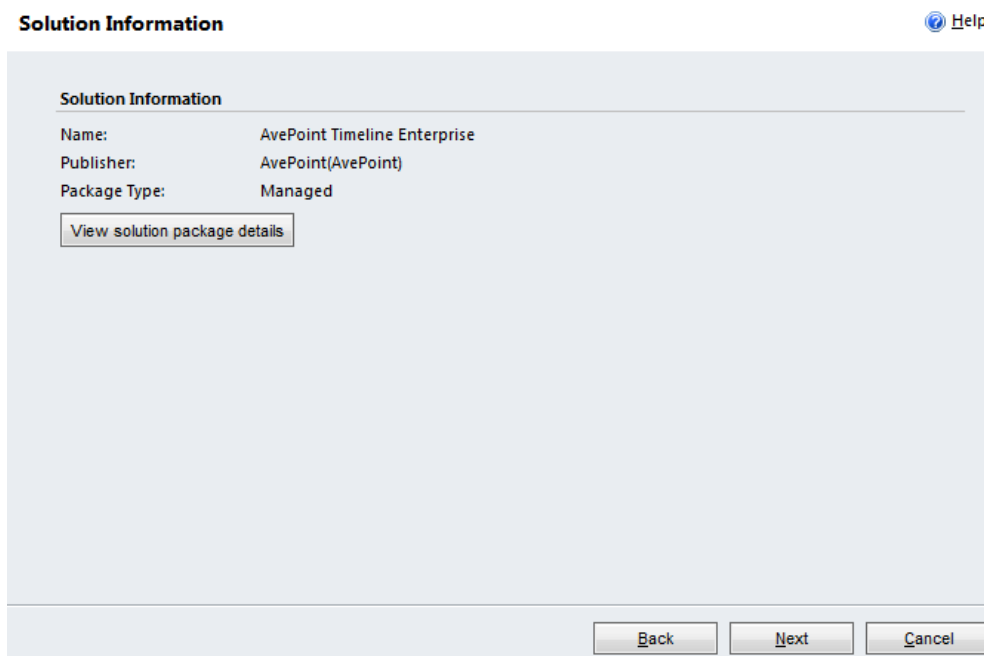6. In the **Solution Information** page, verify the solution **Name**, **Publisher**, and **Package Type**.

Figure 3: The Solution Information page (Dynamics CRM 2011 environment shown).

7. If desired, you can view the details of the solution package.

    a. Click **View solution package details** for more details.

- **Solution Details** – Displays the version, package type, and so on.

- **Publisher Details** –Displays the solutions components that will be imported.

    b. Click **Close** to return to the **Solution Information** page.

    c. Click **Next** to continue.
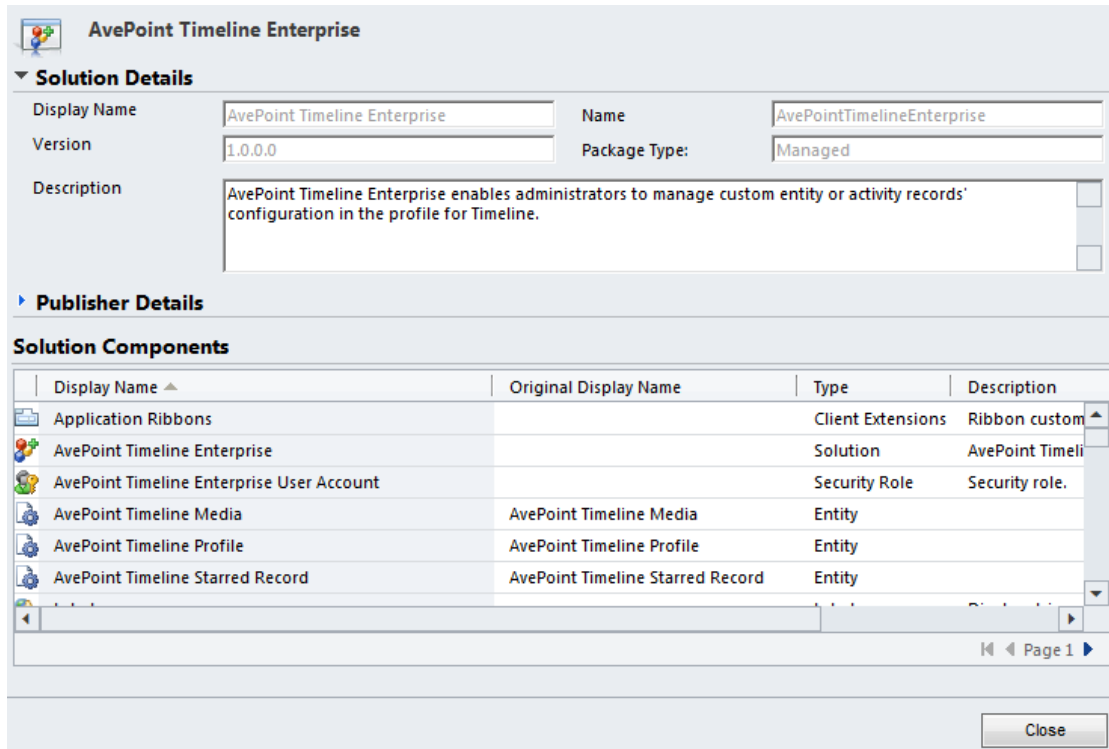

Figure 4: The Solution Details and Publisher Details page (Dynamics CRM 2011 environment shown).

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8. To complete the import process, select the **Activate any processes and enable any SDK message processing steps included in the solution** checkbox (**Enable any SDK message processing steps included in the solution** checkbox in Dynamics CRM 2013 environment) shown below.
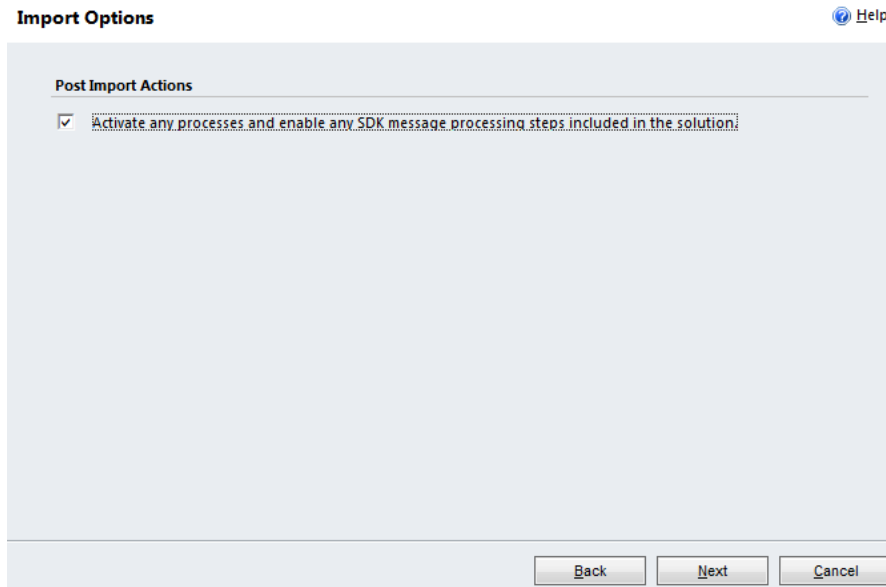

Figure 5: The Import Options page (Dynamics CRM 2011 environment shown).

*Note: If the checkbox described above is not selected, then the steps to install the plug-in will not be activated and the process cannot be completed.

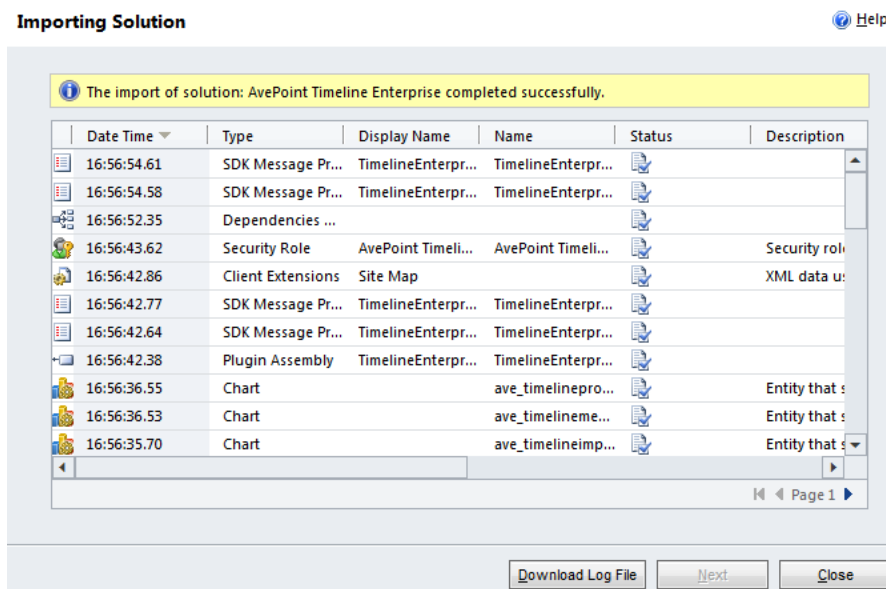9. Click **Next** (**Import** in Dynamics CRM 2013 environment) and wait for the operation to complete.

Figure 6: The Importing Solution page (Dynamics CRM 2011 environment shown).

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10. After the solution imports successfully, click **Close** to close the **Importing Solution** page.

11. Verify that the **AvePointTimelineEnterprise** solution is displayed in the **All Solutions** list.
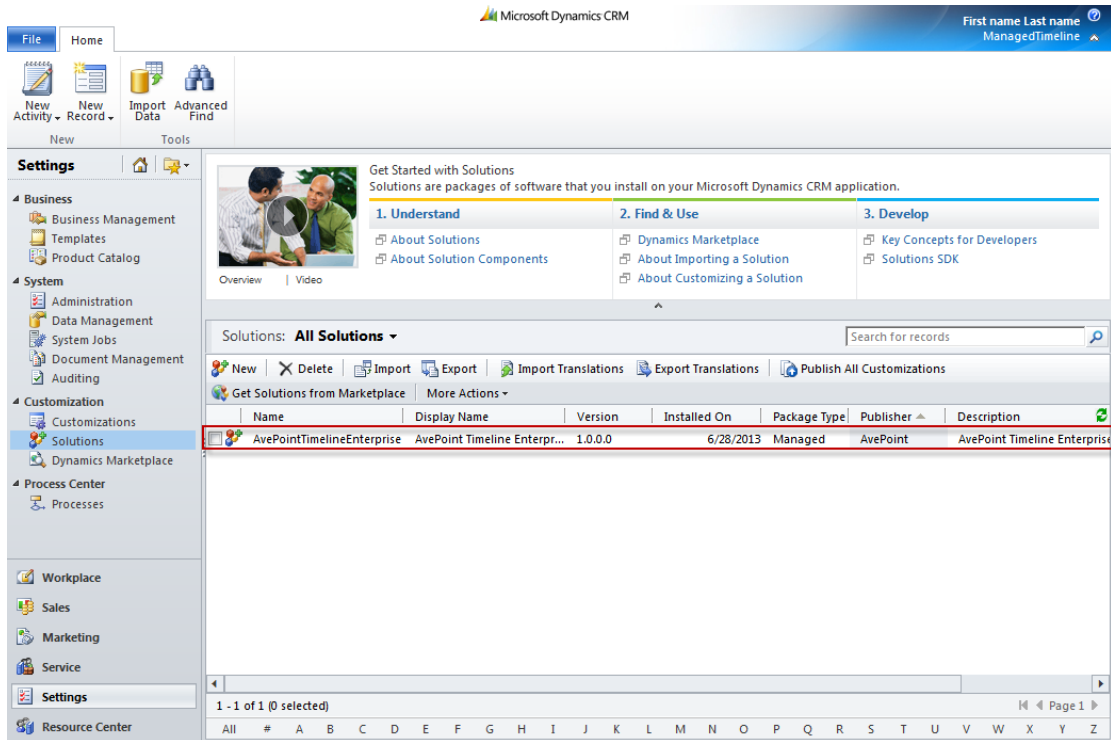

Figure 7: The AvePointTimelineEnterprise solution (Dynamics CRM 2011 environment shown).

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Registering a License

After importing the AvePoint Timeline Enterprise Solution, an Enterprise license must be applied. Refer to the instructions below:

1. After importing the solution, refresh Microsoft Dynamics CRM 2013/2011.

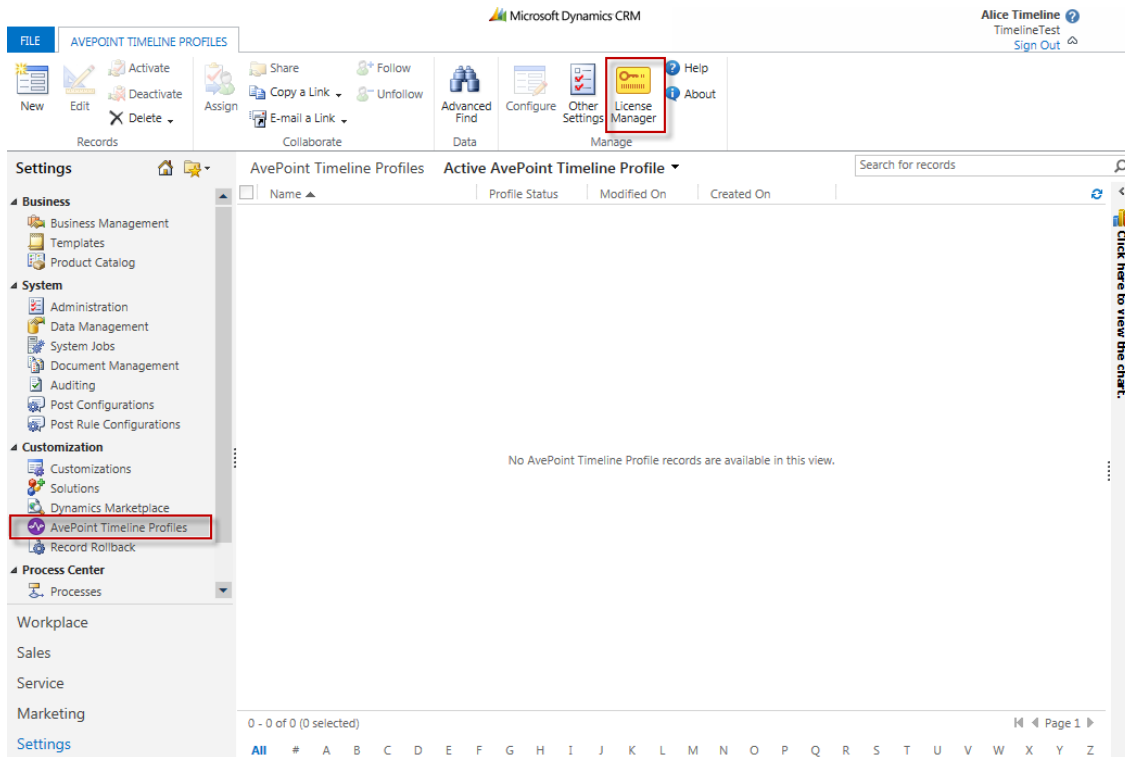2. Navigate to **Settings** > **Customization** > **AvePoint Timeline Profiles**.

Figure 8: Click AvePoint Timeline Profiles (Dynamics CRM 2011 environment shown).

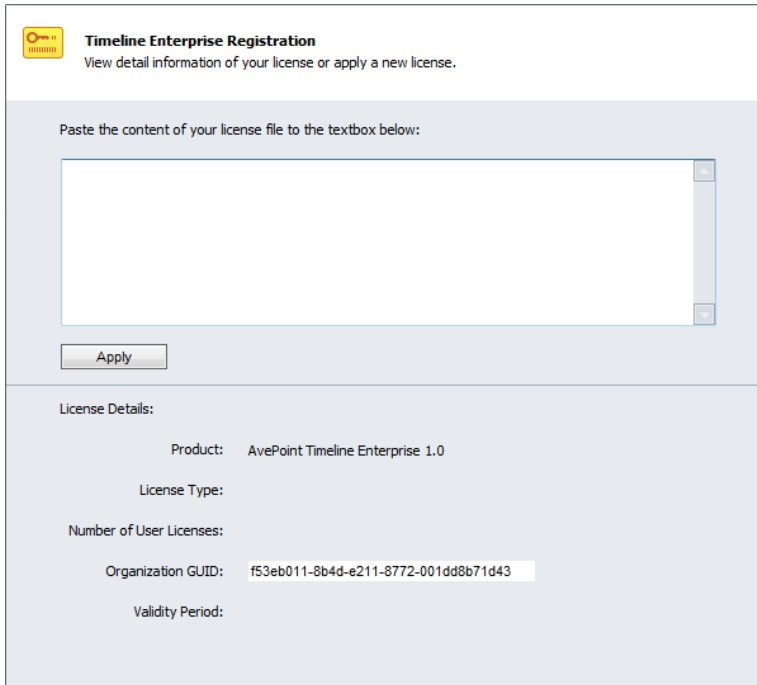3. Click **License Manager** on the ribbon. The **Timeline Enterprise Registration** pop-up window appears.

Figure 9: The Timeline Enterprise Registration pop-up window (Dynamics CRM 2011 environment shown).

4. Open the license file using **Notepad** and copy all of the content within it into the blank text box on the **Timeline Enterprise Registration** interface.

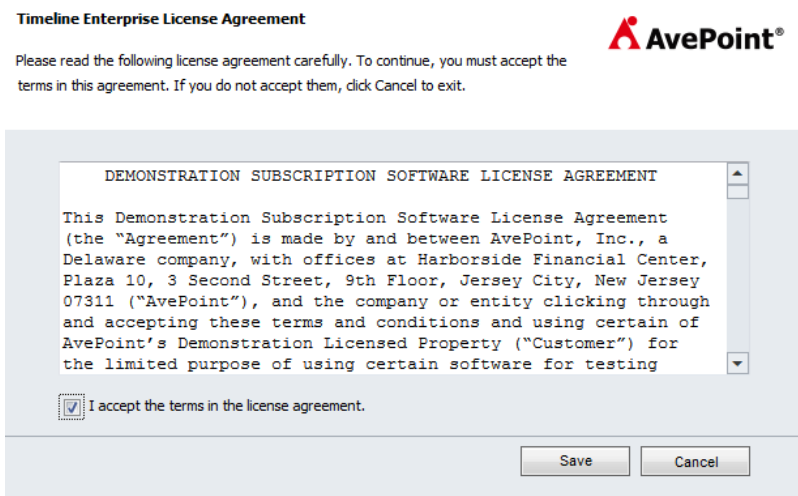5. Click **Apply** to apply the license. The **Timeline Enterprise License Agreement** pop-up window appears.

Figure 10: The Timeline Enterprise License Agreement pop-up window (Dynamics CRM 2011 environment shown).

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6. Select the **I accept the terms in the license agreement** checkbox, and then click **Save**.

7. After the license applied successfully, the license information is displayed in the **License Details** area.

- **Product** – The product information that the license is applied to.

- **License Type** – Display the license type information.
  - o **Demo** – The validity period is 30 days.
  - o **Enterprise** – The formal license to register the product. The validity period in this License is according to your purchase.

- **Number of User Licenses** – The maximum number of users that are allowed to connect to the Dynamics CRM Server where this solution resides.

- **Organization GUID** – The GUID of the organization that has installed the Microsoft Dynamics CRM. This is used when you want to purchase the **Enterprise** license.

- **Validity Period** – The validity period that you can use the Timeline Enterprise solution.

Figure 11: Applying the license (Dynamics CRM 2011 environment shown).

Creating a Profile

To create a new AvePoint Timeline Profile, refer to the instructions below:

1. In the **AvePoint Timeline Profiles** tab, click **New** on the ribbon.

2. In the pop-up window, configure the following settings:

    a. **Name** – Enter a name for the profile you are about to create.

    b. **Owner** – Specify an owner for this profile. The default owner is the login user of Dynamics. Click the ☐ icon to select another user or team to own the profile.

    c. **Profile Status** – Specify a status for this profile.

        o **Publish to Owner** – The profile can only be used by the owner.

        o **Publish to Everyone** – The profile can be used by other users of Dynamics.

    d. **Description** – Enter an optional description for this profile.

3. Click **Save** to save the newly-created profile.

Helpful Notes for Profiles

The following situations explain when and which AvePoint Timeline Profile will be used by Timeline.

- Only the **Publish to Owner** profiles exist in Dynamics

  o If the user that logs into Timeline is the owner of one of the profiles, the profile whose owner is this user will be used by Timeline.

  o If the user that logs into Timeline is the owner of more than one profile, the profile whose owner is this user and modified time is the latest will be used by Timeline.

  o If the user that logs into Timeline is not the owner of the **Publish to Owner** profiles, the default settings will be used to load the specified entities and activities in Timeline.

- If only **Publish to Everyone** profiles exist in Dynamics, the profile with the latest modified time will be used by Timeline.

- Both the **Publish to Owner** and **Publish to Everyone** profiles exist in Dynamics

  o If the user that logs into Timeline is the owner of more than one **Publish to Owner** profile, the **Publish to Owner** profile whose owner is this user and modified time is the latest will be used by Timeline.

  o If the user that logs into Timeline is the owner of one of the **Publish to Owner** profiles, the profile whose owner is this user will be used by Timeline.

- o If the user that logs into Timeline is not the owner of the **Publish to Owner** profile, the **Publish to Everyone** profile that has the latest modified time will be used by Timeline.

- If neither **Publish to Owner** nor **Publish to Everyone** profile exists in Dynamics, the default settings will be used to load the specified entities and activities in Timeline.

Editing Profiles

You can edit your created profiles by clicking **Configure** on the **Manage** group. The **Edit Profile** pop-up window appears. In the **Edit Profile** window, configure the settings below:

- **Entity Page** – Specify the roles and the entities of each role that you want to use in Timeline.

  - o **Role Category** – Specify the roles that you want to use in Timeline and specify the corresponding entities of each role. The default roles are: **Sales**, **Marketing**, and **Service**. You can view and manage the information of the roles in Timeline.

    - **Manage roles** – Click ➕ to add a new role. Click ✏ next to each role to edit the corresponding role. Click ✖ next to each role to remove the corresponding role, and the removed role will be restored to the **Entity Explorer**.

    - **Manage entities** – Add an entity by dragging one from the **Entity Explorer** and place the entity to the desired place in the **Entities of …** area. To remove entities from a role, select the entity, and then click **Remove** upper right-hand corner of the **Edit Profile** interface.

    Click **Sketch Map** to view the corresponding locations of the specified roles in Timeline. You can change the platform of Timeline by clicking **Windows 8**, **iPad**, **iPhone**, or **Android**.
    *Note: At least one entity is required for the specified roles, or you will not be able to advance to the next page, even after clicking **Next**.

  - o **Entity View** – The entities selected in the **Role Category** step will be listed in the **Entity** field. Specify the views for each entity. Add a view by dragging one from the **View Explorer** and place the view to the desired place in the **… View** area. Click each view in the **View Explorer**. The **Entity Tile Preview** of the view appears under the view.

    Click **Sketch Map** to view the corresponding locations of the specified entities in Timeline. You can change the platform of Timeline by clicking **Windows 8**, **iPad**, **iPhone**, or **Android**.

- **Timeline Page** – Specify the filter types, activity priority, activity details, milestone, and contact details that you want to use in Timeline.

  - o **Filter Types** – Specify the activity filter information. View different activities by selecting different filters in Timeline. There are two kinds of filter types: **General**

Type and **Others**. Add a filter by dragging one from the **Activity & Note Explorer** and place the filter to the desired place. Click **Remove** to remove the selected filter. And the removed filter will be restored to the explorer.

Click **Sketch Map** to view the corresponding locations of the specified filters in Timeline. You can change the platform of Timeline by clicking **Windows 8**, **iPad**, **iPhone**, or **Android**.

o **Activity Priority** – Specify the priority of the activity or note. The activities or notes are displayed according to different priorities in Timeline. There are five priorities: **Open**, **Completed**, **Canceled**, **Scheduled**, and **Default**. The default priority is the **Default** priority. Add a field to the priority by dragging one from the **Field Explorer**. Click **Remove** to remove the selected field.

Click **Sketch Map** to view the corresponding locations of the specified priorities in Timeline. You can change the platform of Timeline by clicking **Windows 8**, **iPad**, **iPhone**, or **Android**.
*Note: Only one field can be added to each priority.

o **Activity Details** – Specify the detailed information of each activity. The activity will be configured by the specified fields in Timeline. **Overview** is the default view of activities displayed in Timeline. Only two fields can be added to **Overview**. **Detailed Header** and **Detailed Body** are displayed in the detailed information of an activity in Timeline. Add a field by dragging one from the **Field Explorer** and place the field to the desired place. Click **Remove** to remove the selected field.

Click **Sketch Map** to view the corresponding locations of the specified activity details in Timeline. You can change the platform of Timeline by clicking **Windows 8**, **iPad**, **iPhone**, or **Android**.

o **Milestone** – Specify the milestone information of the entities. The milestone will be displayed in the time line when you enter an entity in Timeline.

Click **Sketch Map** to view the corresponding locations of the specified milestones in Timeline. You can change the platform of Timeline by clicking **Windows 8**, **iPad**, **iPhone**, or **Android**.

o **Contact Details** – Specify the detailed information of each activity of Contacts. The activity's information will be displayed in the **Contacts** interface of Timeline. Add a field by dragging one from the **Field Explorer** and place the field to the desired place. Click **Remove** to remove the selected field. And the removed field will be restored to the explorer.

Click **Sketch Map** to view the corresponding locations of the specified Contact details in Timeline. You can change the platform of Timeline by clicking **Windows 8**, **iPad**, **iPhone**, or **Android**.

After editing the profile, click **Save** to save changes to this profile.

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Configuring the Security Role

After the AvePoint Timeline Enterprise solution is imported into Dynamics, the **AvePoint Timeline Enterprise User Account** role will be automatically created in Dynamics. Only users who have this security role or a security role that has higher permissions than the AvePoint Timeline Enterprise User Account can use AvePoint Timeline Profile in Timeline. Users who do not have sufficient permissions will use the default profile in Timeline. Refer to the instructions below to assign security roles to users.

*Note: Users who have the **System Administrator** security role can assign security roles to other users.

1. Navigate to **Settings** > **System** > **Administration** > **Users/Teams**.

2. Click a user/team in the **User** tab, or select a user/team and click **Edit** on the ribbon.

3. In the detailed information page of the selected user/team, click **Security Roles** under the **Common** title.

4. Click **Mange Roles**. The **Manage Team Roles** or **Manage User Roles** pop-up window appears.

5. By default, the **AvePoint Timeline Enterprise User Account** role is displayed. The security role's permissions are shown below:

Figure 12: The permissions in the Custom Entities tab (Dynamics CRM 2011 environment shown).

Figure 13: The permissions in the Customization tab (Dynamics CRM 2011 environment shown).

6. Select the **AvePoint Timeline Enterprise User Account** checkbox or other role's checkbox as desired.

7. Click **OK** to save changes.

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Installing Timeline on a Windows 7 Operating System

To install Timeline on a Windows 7 Operating System, follow the instructions below:

*Note: The server where you install Timeline must have **.Net Framework 4.0** or above installed.

1. **Download** the **AvePoint_Timeline_for_CRM_Serial_Number.msi** file by contacting an AvePoint representative for links to the package.

2. **Copy** the .msi file to the server that has the Windows 7 operating system installed.

3. Double-click the **AvePoint_Timeline_for_CRM_Serial_Number.msi** file on the server.

   *Note: You can manage Group Policy for your Windows 7 Operating System installation using the .msi file.

4. The **Welcome** interface of the AvePoint Timeline for Dynamics CRM Setup appears.
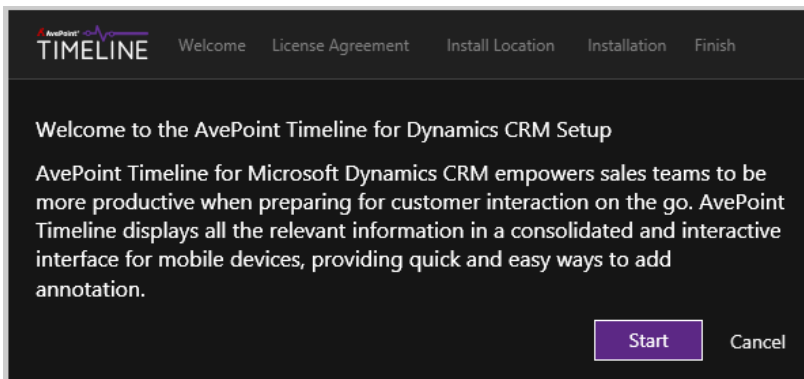

   Figure 14: The Welcome interface.

5. Click Start to install Timeline immediately.

6. In the License Agreement interface, click Accept to accept the agreement.
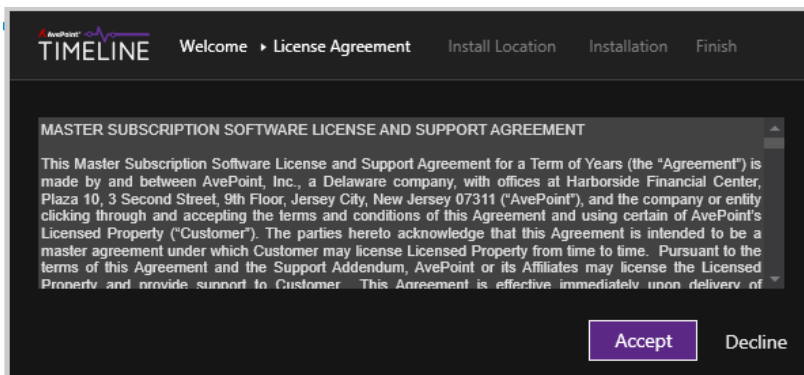
   Figure 15: The License Agreement interface.

7. In the **Install Location** interface, click the folder icon to specify a location to install Timeline. Then click **Install** to start installing Timeline.

Figure 16: The Install Location interface.

8. After the installation finishes, click **Launch** to go to the login page of Timeline and close this interface. Or click **Close** to close this interface immediately without launching Timeline.

Figure 17: The Finish interface.

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Configuring "Star" and "Open in Timeline" Settings

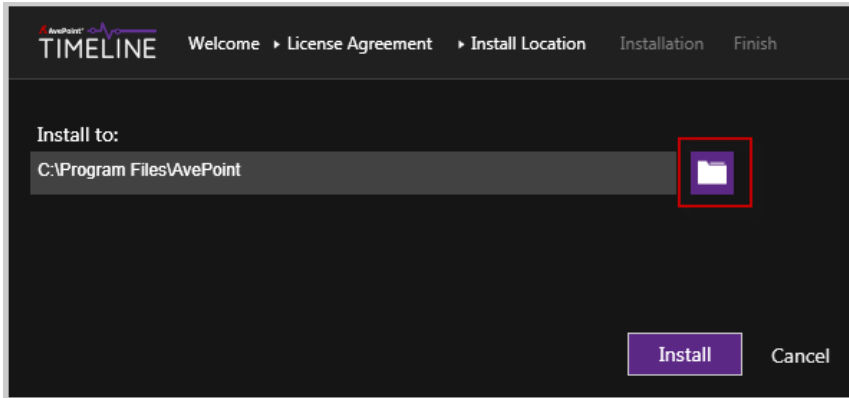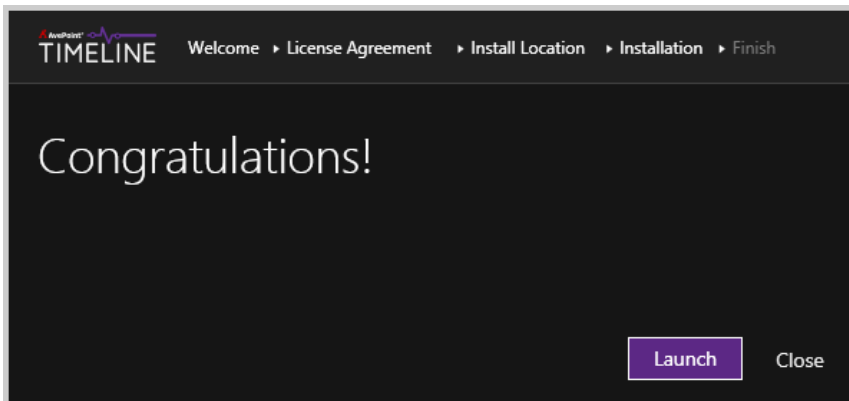The **Star** and **Open in Timeline** settings are configured automatically after the AvePoint Timeline Enterprise solution is imported into Microsoft for Dynamics CRM. If desired, you can manually configure these settings. Refer to the instructions below:

1. In the **AvePoint Timeline Profiles** tab, click **Other Settings** on the ribbon.

2. In the **Other Settings** pop-up window, configure the settings below:

   - **Open in Timeline** – Specify the entities that you want to open in Timeline from Dynamics CRM. Add an entity by dragging one from the **Entity Explorer** and place the entity to the desired place in the **Entity** area. The Activities option is also regarded as an entity in this interface. Click **Remove** to remove the selected entity and restore the entity to the explorer.

   - **Star** – Specify the entities that you want to enable the Star functionality. Add an entity by dragging one from the **Entity Explorer** and place the entity to the desired place in the **Entity** area. The Activities option is also regarded as an entity in this interface. Click **Remove** to remove the selected entity and restore the removed entity to the explorer.

3. After configuring the settings, click **Save** to save changes.

The Star Functionality

Use the **Star** function to tag entity records and records as important records both in Dynamics and Timeline. All starred records are synchronized between Dynamics and Timeline. Filter the starred records by using the **Starred** filter in Timeline. To configure the Star setting, refer to the instructions below:

   - Access the entity that has enabled the Star functionality, select one or more records and click **Star** in the **Timeline** group on the ribbon, and then select the **Star** option from the drop-down list. The selected records will be marked with star in Timeline. Select the **UnStar** option from the drop-down list, the selected records will be cancelled the mark.

   - Access a record of the entity that has enabled the Star functionality, and click **Star** in the **Timeline** group on the ribbon. This record will be marked with star in Timeline.

   - Access the activity whose related entity has enabled the Star functionality, and click **Star** in the **Timeline** group on the ribbon. The record of this activity will be marked with star in Timeline.

The Open in Timeline Functionality

Use the **Open in Timeline** function to launch the selected Timeline interface when you open an entity record or activity record. To configure the Open in Timeline setting, refer to the instructions below:

- Access the entity that has enabled the Open in Timeline functionality, select one record and click **Open in Timeline** in the **Timeline** group on the ribbon. The interface of the selected record in Timeline will pop up.

- Access a record of the entity that has enabled the Open in Timeline functionality, and click **Open in Timeline** in the **Timeline** group on the ribbon. The interface of this record in Timeline will pop up.

- Access the activity whose related entity has enabled the Open in Timeline functionality, and click **Open in Timeline** in the **Timeline** group on the ribbon. The interface of this activity in Timeline will pop up.

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The Starred Records Bulk Delete Job

After the Star functionality is configured, the AvePoint Timeline Starred Records Bulk Delete job will be created automatically in Dynamics. When an entity record or activity record is starred, a record will be created automatically to record this action. This record will not be deleted even when the corresponding entity record or activity record has been deleted from Dynamics. The AvePoint Timeline Starred Records Bulk Delete job is used to delete such records from Dynamics.

This job will run according to the default recurrence. You can modify the job recurrence and manage (**Postpone**, **Pause**, **Resume**, or **Cancel**) your jobs. Refer to the instructions below:

1. Navigate to **Settings** > **System** > **Data Management** > **Bulk Record Deletion**.

2. In the **Bulk Record Deletion** page, select the **Recurring Bulk Deletion System Jobs** view in the drop-down list.

3. The **AvePoint Timeline Starred Records Bulk Delete** job is displayed and in **Waiting** status.

4. Click this job to view detailed information and edit the settings.
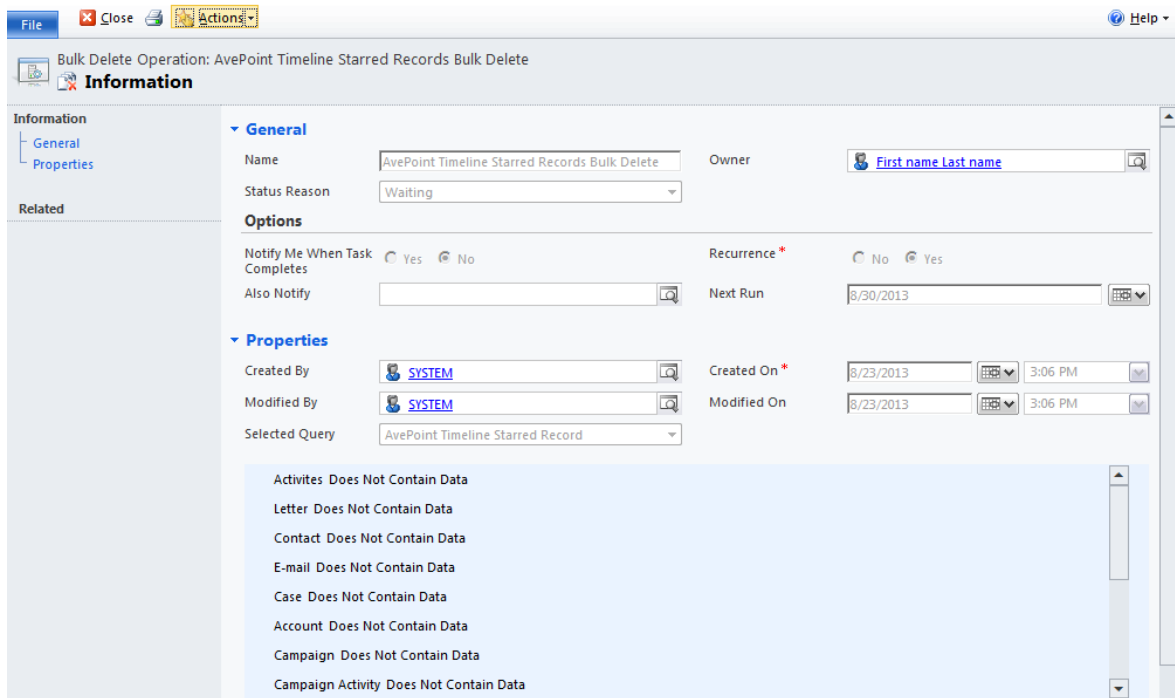

Figure 18: The AvePoint Timeline Starred Records Bulk Deletion job (Dynamics CRM 2011 environment shown).

5. Click **Actions** and select **Modify Recurrence** from the drop-down list.

6. In the **Modify Recurrence** pop-up window, modify the settings as desired.

- **Never** – This bulk deletion system job will not be used.

- **Today at** – Specify a time and the bulk deletion system job will run at the specified time today.

- **Schedule recurrence** – Specify the time period and start time for this job. This bulk deletion system job will start at the start time and run again after the specified time period.

Figure 19: The Modify Recurrence interface (Dynamics CRM 2011 environment shown).

7. **Postpone**, **Pause**, **Resume**, or **Cancel** this job by selecting the corresponding option from the **Actions** drop-down list.

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Using AvePoint Timeline Enterprise

You can use AvePoint Timeline Enterprise for thirty days for free. After that, contact an AvePoint representative for assistance with purchasing an Enterprise license.

For more information on how to use AvePoint Timeline Enterprise, refer to the AvePoint demo video site here: http://www.avepoint.com/resources/etutorials/

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