



c360 Relationship Chart Installation Guide

Relationship Chart Version 1.2.1 – Microsoft CRM 1.2 Compatible

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Overview and Notes

Overview

An installation application, c360.RelationshipChart.Setup.exe has been created to simplify the setup of c360 Relationship Chart. This document walks through the setup wizard screens. The installation application must be run on the CRM Server machine by a user with Domain Administrator privileges.

Microsoft CRM Compatibility

c360 Relationship Chart version 1.2.1 is compatible with Microsoft CRM version 1.2.



Installation Instructions

Installation Instructions

If installing on a system other than the sample installation, Adventure Works Cycle, you will need to have your c360 Relationship Chart license file on hand to complete the installation.

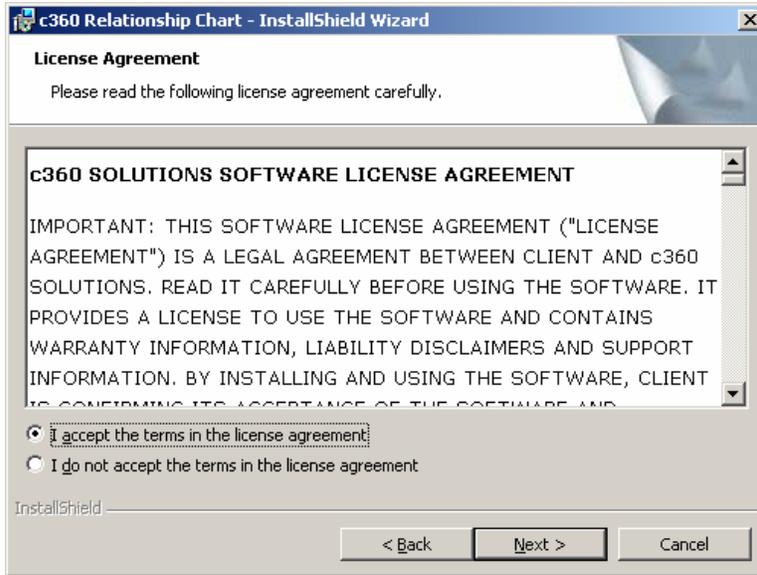
Follow these steps to install Relationship Chart:

1. Extract the c360.RelationshipChart(MSCRMv1.2).zip file into a folder on the Microsoft CRM server computer.
2. Double click the 'c360.RelationshipChart.Setup.exe' file.
3. Click *Next* to begin the installation process.

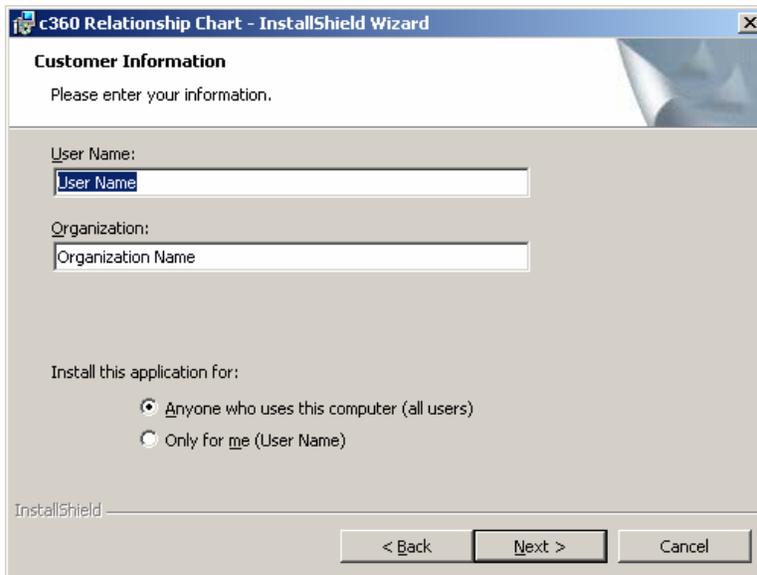




4. Accept the License Agreement and click *Next*.



5. Verify the Administrator user account and Organization name and click *Next*.





6. Enter the machine name where the Microsoft CRM databases reside and click *Next*.

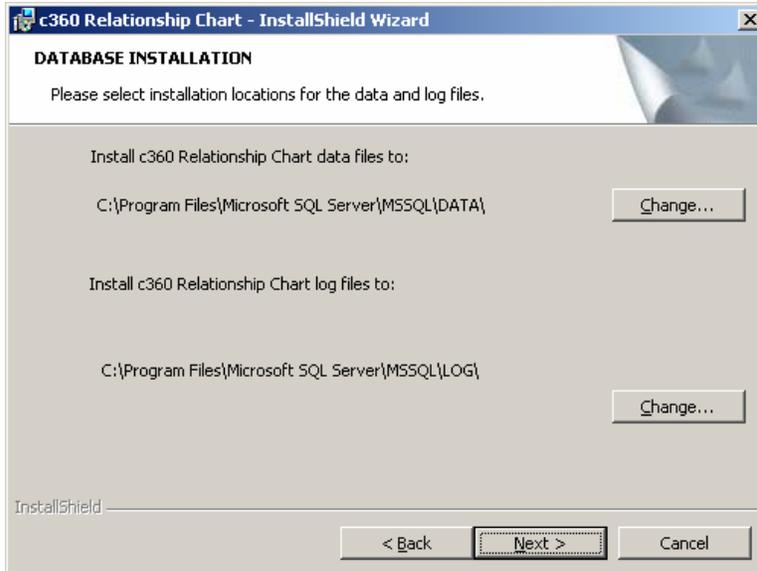
This is a screenshot of the 'c360 Relationship Chart - InstallShield Wizard' window. The title bar reads 'c360 Relationship Chart - InstallShield Wizard'. The main heading is 'DATABASE INSTALLATION'. Below the heading, it says 'This setup will create the "c360_Solutions" database in Microsoft SQL Server'. A note follows: 'Please provide the machine name where Microsoft SQL Server is located. NOTE: This machine name must correspond to the machine where Microsoft CRM databases reside.' There is a text input field containing '127.0.0.1'. Below this, it says 'Connect using:' and there are two radio button options: 'Windows Authentication' (which is selected) and 'SQL Server Authentication'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'InstallShield' logo is visible in the bottom left corner.

7. If "SQL Server Authentication" is selected, the username and password for a SQL login with 'SA' privileges must be provided.

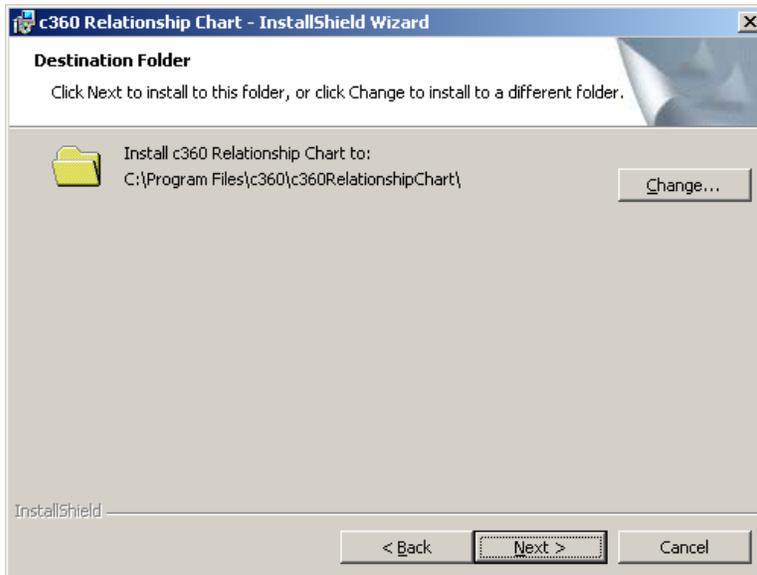
This is a screenshot of the 'c360 Relationship Chart - InstallShield Wizard' window, showing the next step in the 'DATABASE INSTALLATION' process. The title bar is the same. The main heading is 'DATABASE INSTALLATION'. Below the heading, it says 'Provide login name and password to connect to SQL Server'. There are two text input fields: the first is labeled 'Login Na...' and contains 'sa'; the second is labeled 'Password:'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'InstallShield' logo is visible in the bottom left corner.



8. Select the location of the data and log files for the c360_Solutions database and click *Next*.

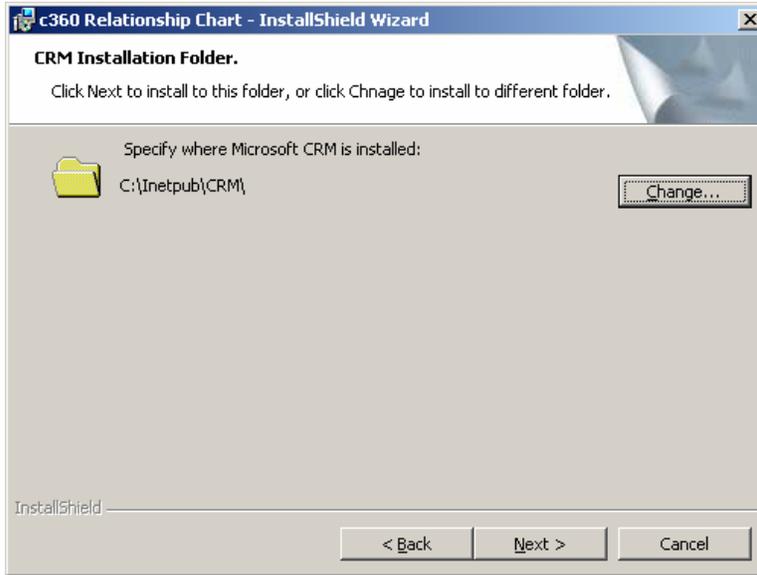


9. Select the location for the program files and click *Next*.

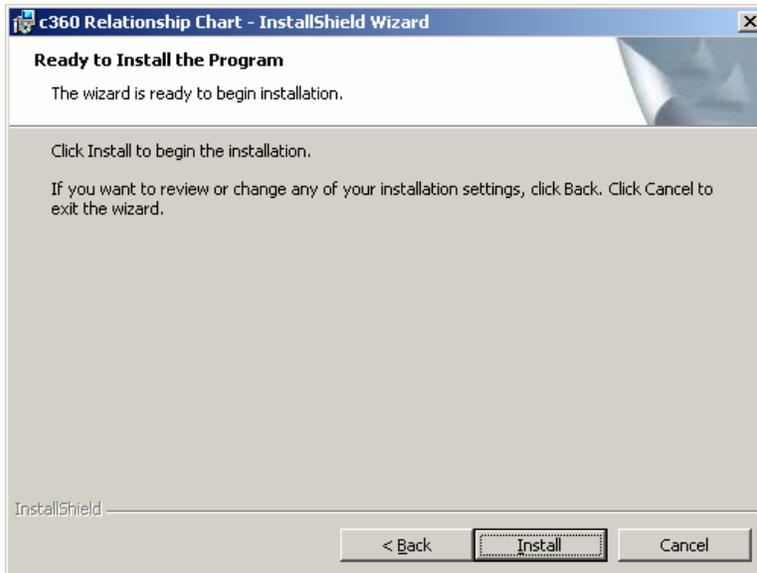




10. Verify the location of Microsoft CRM web application files. Select *Change...* if Microsoft CRM is installed in a different location. This folder should contain the 'web.config' file for Microsoft CRM web application.



11. Click *Install* to install c360 Relationship Chart.

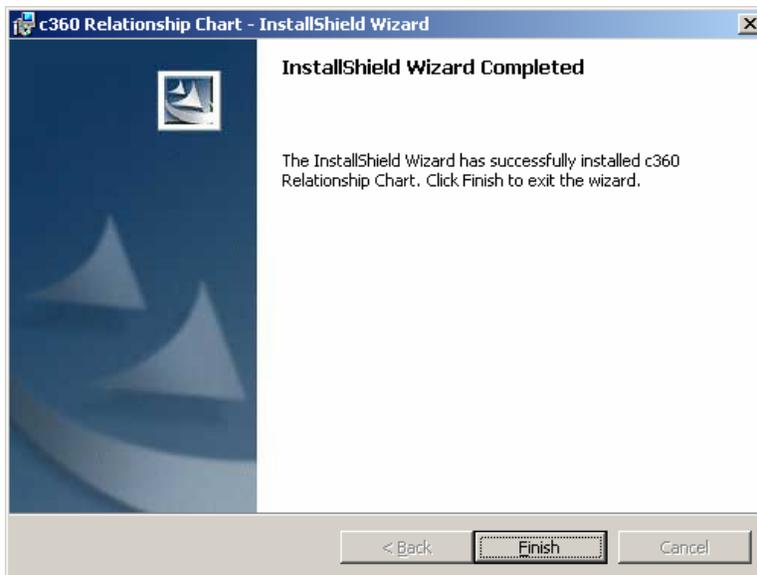




12. Click *OK* to the following two dialog boxes.



13. Click *Finish* to complete the Setup Wizard.



14. If installing on a system other than the sample installation, Adventure Works Cycle, proceed to step 15.

15. Locate the c360 Relationship Chart license file and copy this file into 'Custom\c360\Licenses' folder. Select *Yes* to overwrite the existing license. The 'Custom' folder can be found under the root folder of the Microsoft CRM web application.



Uninstall Instructions ---

Follow these steps to uninstall Relationship Chart:

1. Open 'Add or Remove Programs' from the Control Panel.
2. Select c360 Relationship Chart from list of the currently installed programs.
3. Click *Remove*.
4. Select *Yes* to begin the Uninstall process.
5. To prevent data loss, the c360_Solutions database is not removed from Microsoft SQL Server during the uninstall process.