

Introduction

This document will guide you through the steps required to install the Outlook Calendar Timecard module for Microsoft Dynamics SL. The process involves

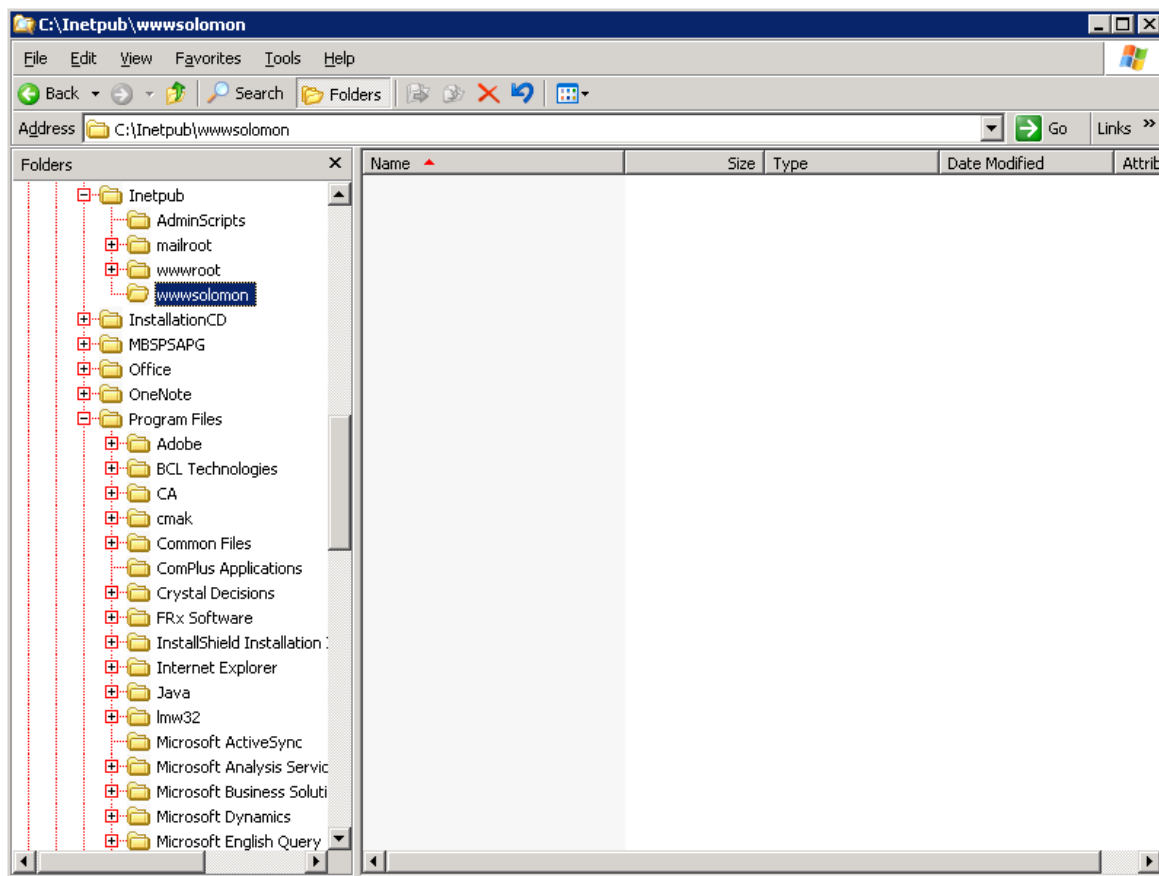
- ✚ Installing the application on the server
- ✚ Running a Client install
- ✚ Setup the Renown Outlook Calendar Timecard Application
- ✚ Setup Renown Outlook Add-in (Optional)

Server Installation

Define the Website Location

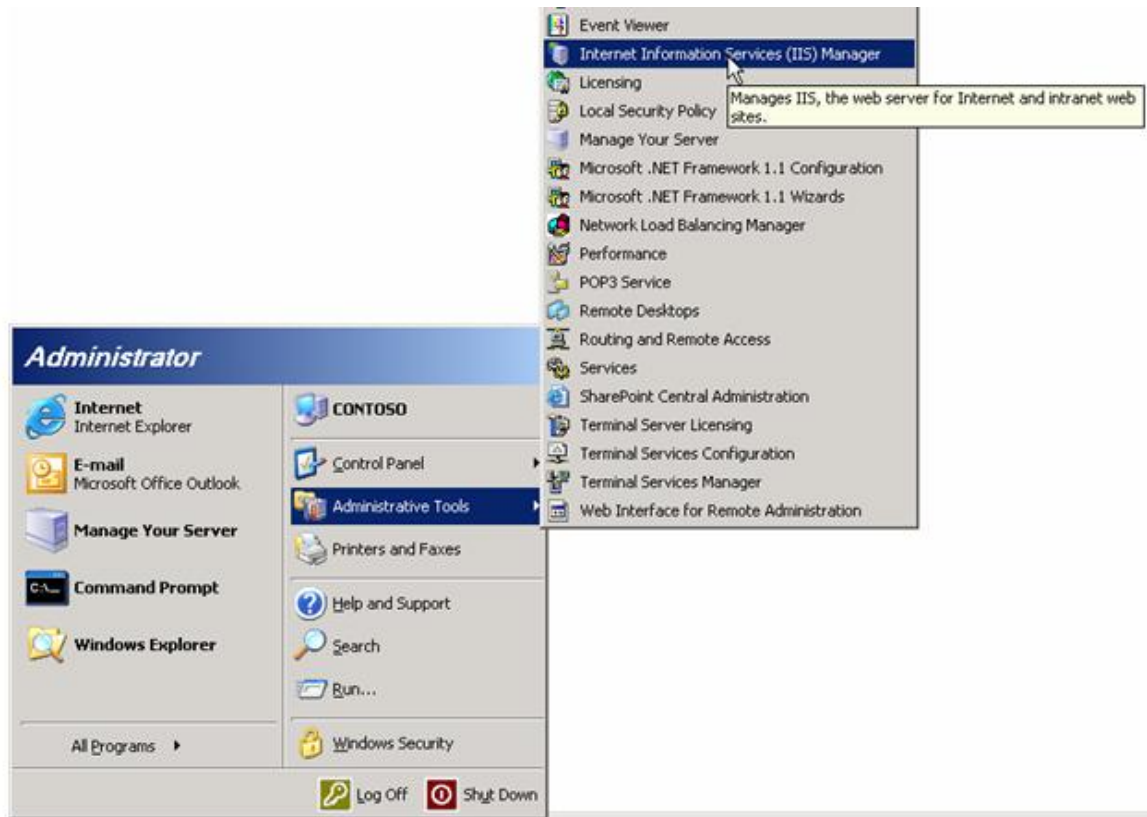
If the server you are installing the web service on has an existing installation of Business Portal and Business Portal has been installed to the Default Web Site on port 80 then you will need to define a new website in IIS to install the Solomon-Outlook integration to. **Renown Outlook Calendar Timecard and Business Portal cannot share the same site.**

1. Open Windows explorer and browse to C:\Inetpub. Create a new folder (eg: wwwSolomon).

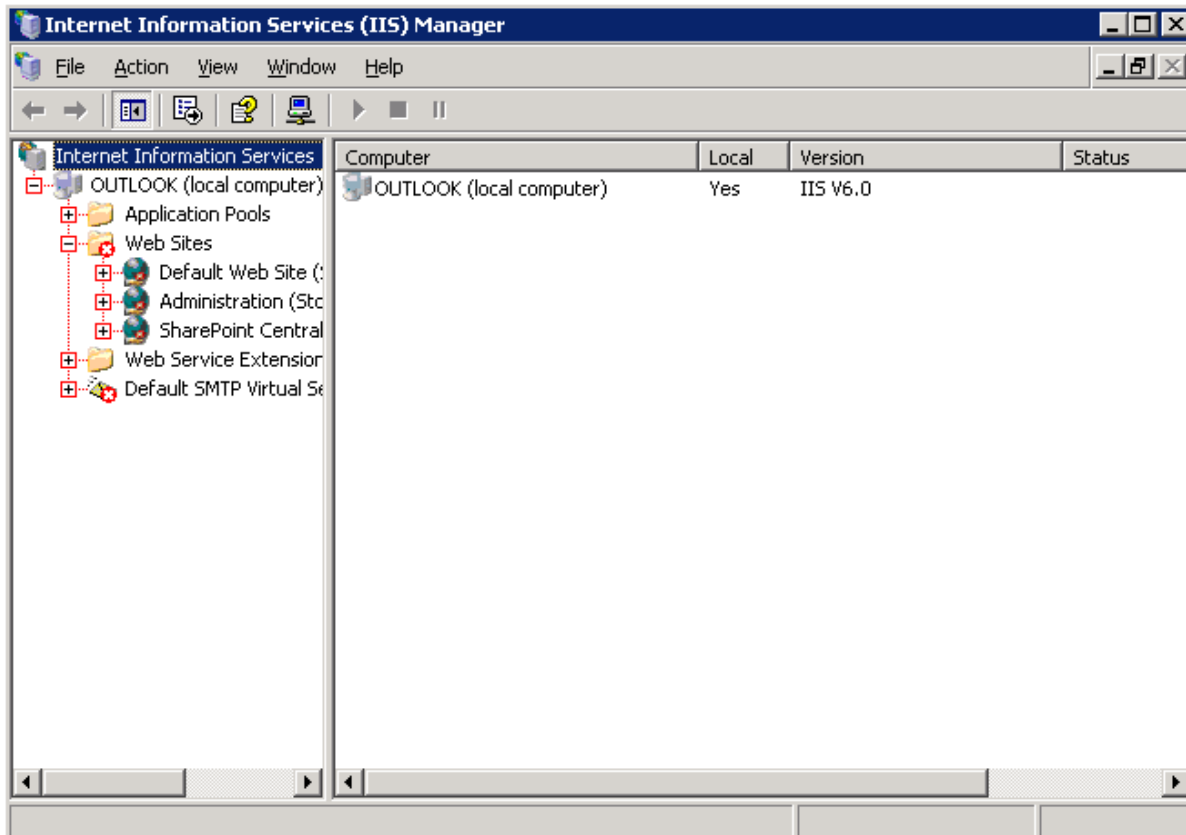


2. Close Windows Explorer.

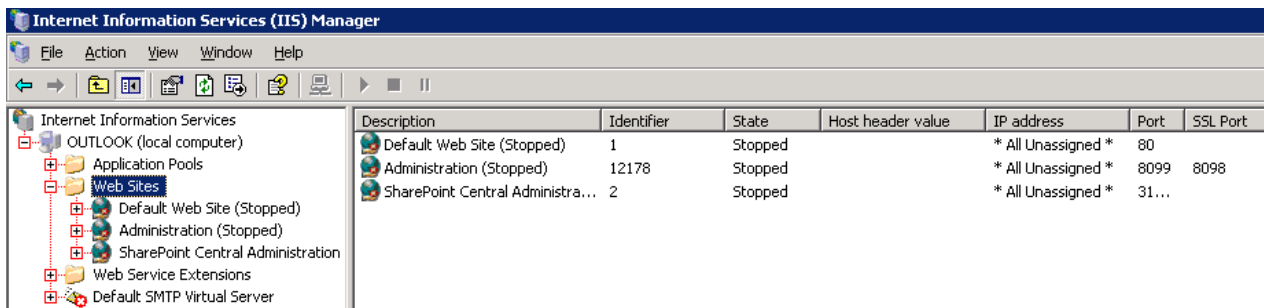
3. Open Internet Information Services (IIS) Manager from Administration Tools.



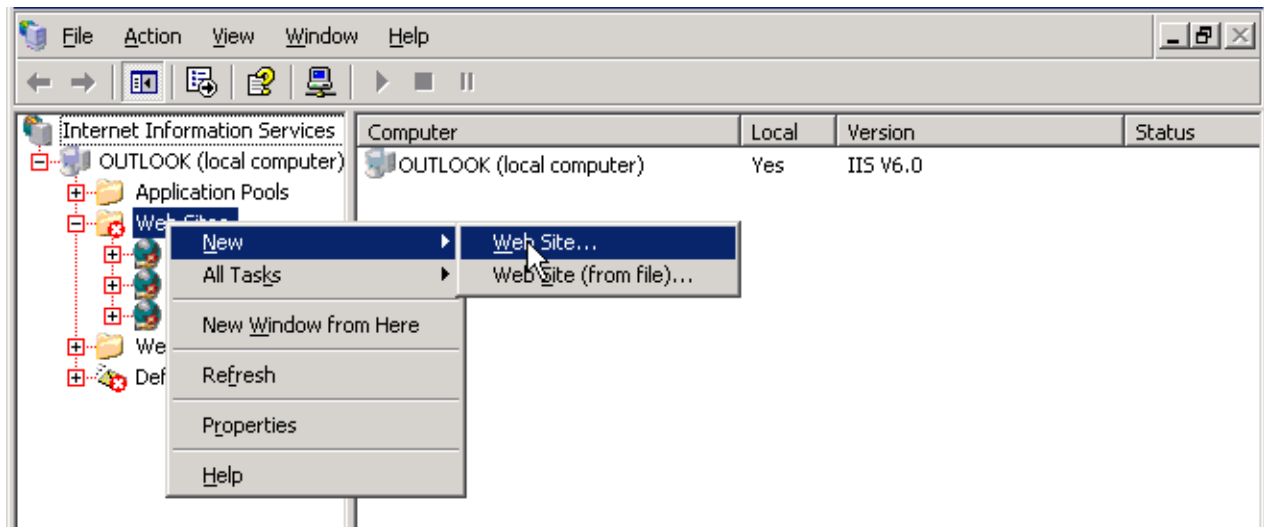
4. Expand the directory on the left to show the Web Sites directory.



5. Check the existing web sites to ensure you do not select a used port number (Port column).



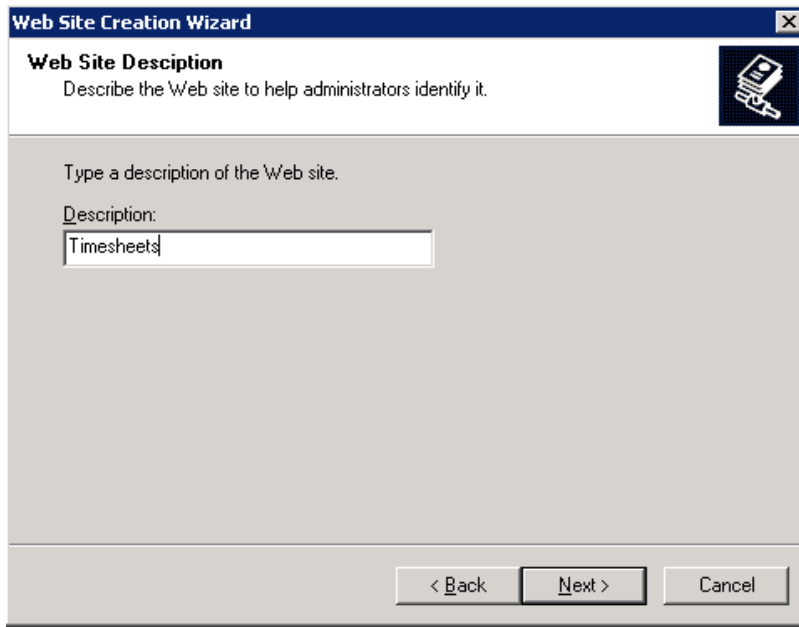
6. Right click on the “Web Sites” node and select [New | Web Site].



7. Click Next.

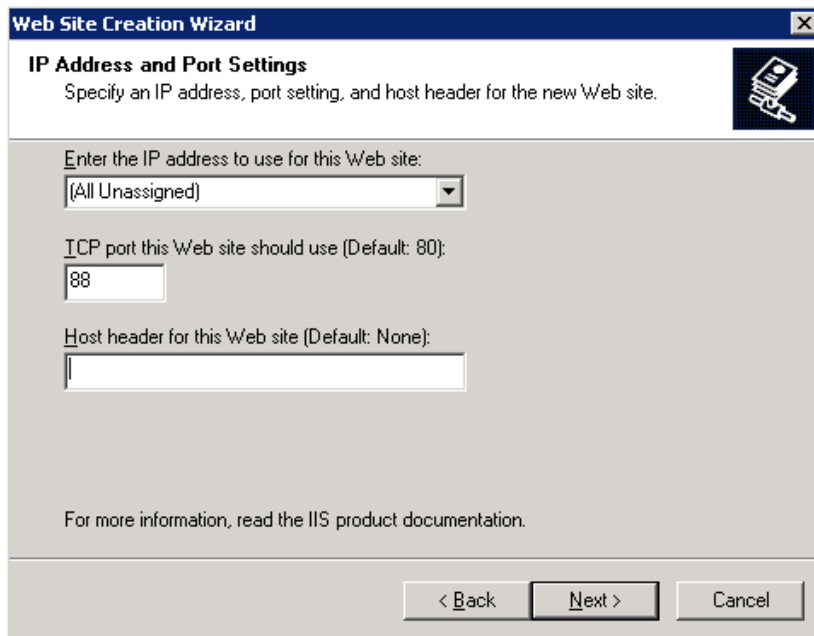


8. Enter a description for the website. Click **Next**.



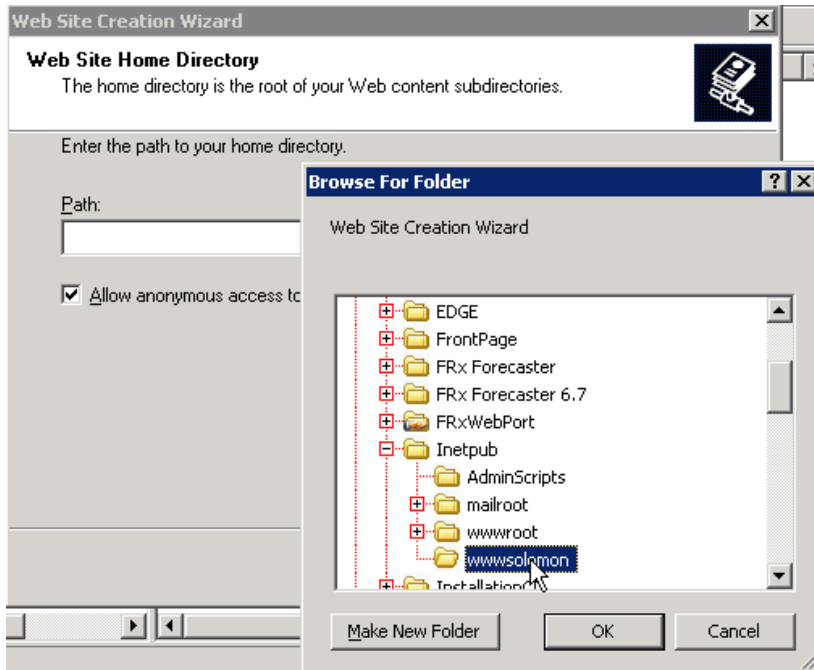
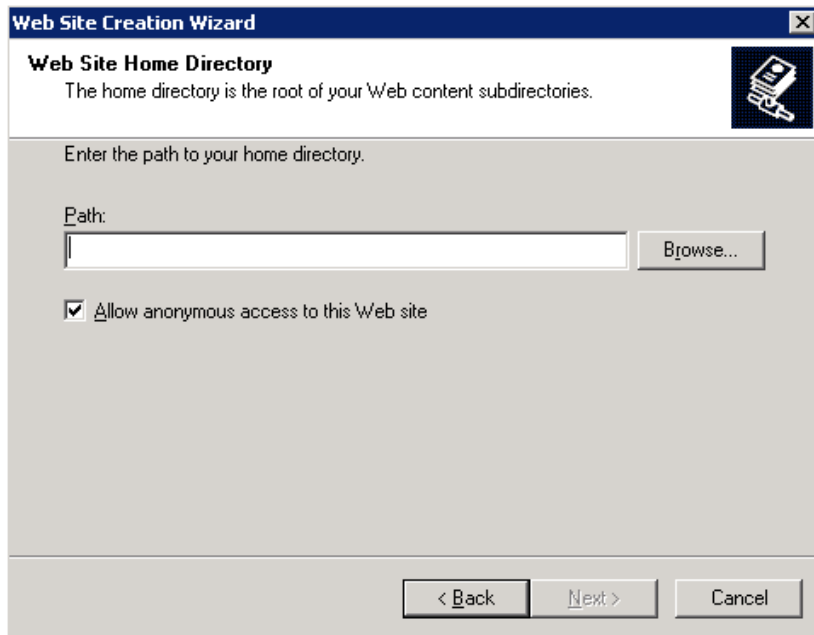
The screenshot shows the 'Web Site Creation Wizard' window. The title bar reads 'Web Site Creation Wizard'. The main heading is 'Web Site Description' with a sub-instruction: 'Describe the Web site to help administrators identify it.' Below this, there is a text box labeled 'Description:' containing the text 'Timesheets'. At the bottom of the window are three buttons: '< Back', 'Next >', and 'Cancel'.

9. Change the port number to a port that is not currently being used (eg: 88). Click **Next**.



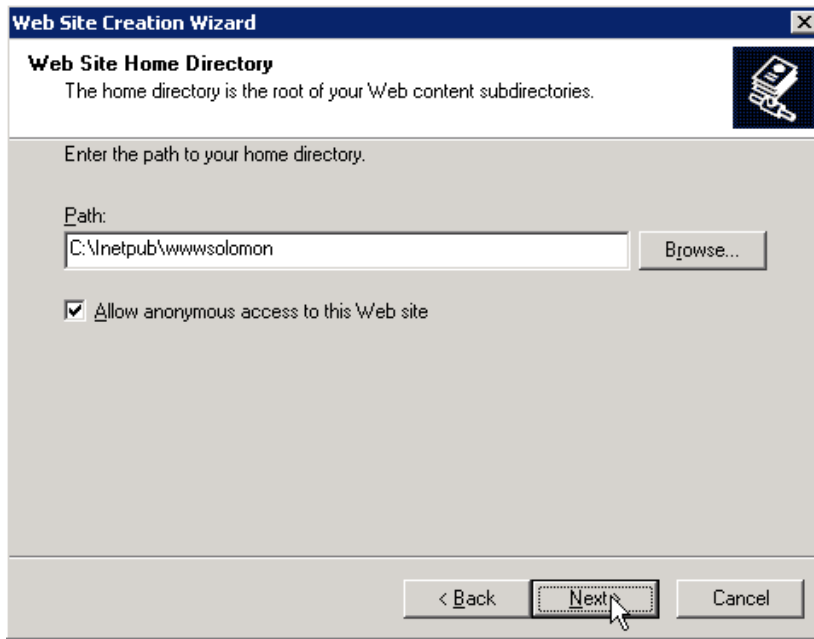
The screenshot shows the 'Web Site Creation Wizard' window at the 'IP Address and Port Settings' step. The title bar reads 'Web Site Creation Wizard'. The main heading is 'IP Address and Port Settings' with a sub-instruction: 'Specify an IP address, port setting, and host header for the new Web site.' Below this, there are three input fields: 'Enter the IP address to use for this Web site:' with a dropdown menu showing '(All Unassigned)'; 'TCP port this Web site should use (Default: 80):' with a text box containing '88'; and 'Host header for this Web site (Default: None):' with an empty text box. At the bottom of the window are three buttons: '< Back', 'Next >', and 'Cancel'.

10. Click the **Browse** button to browse to the folder you created in the Inetpub directory.



11. Click **OK** to return the path to the set up screen.

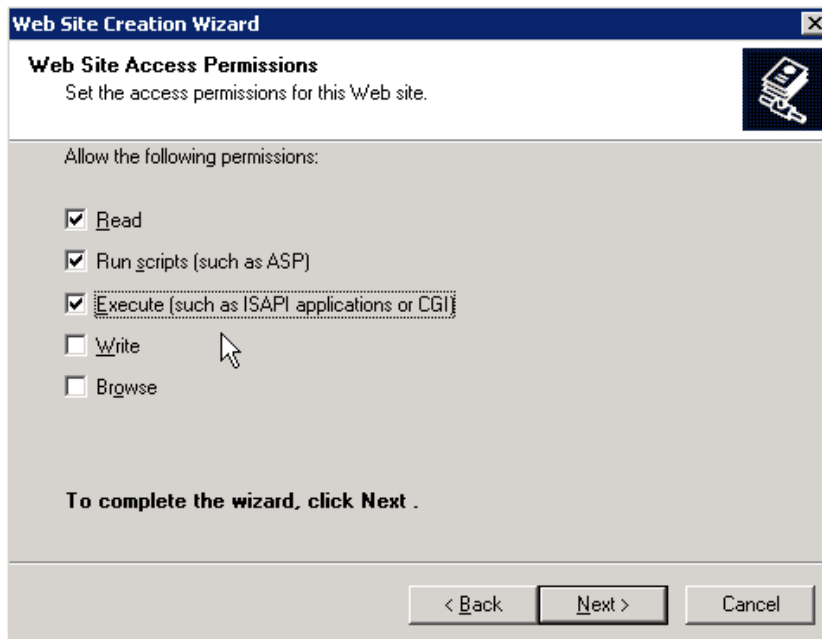
12. Click **Next**.



13. Tick to enable the following checkboxes:

- Read
- Run scripts (such as ASP)
- Execute (such as ISAPI applications or CGI)

Click **Next**.



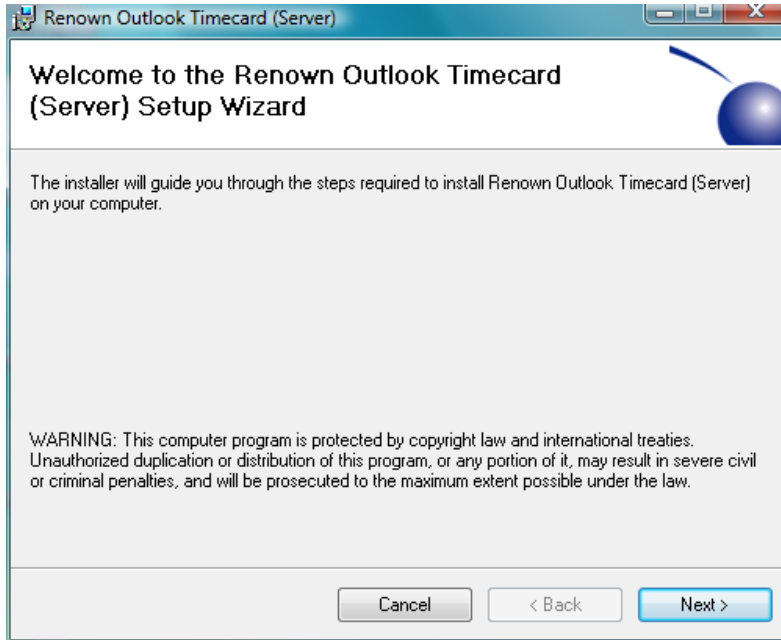
14. Click **Finish**.



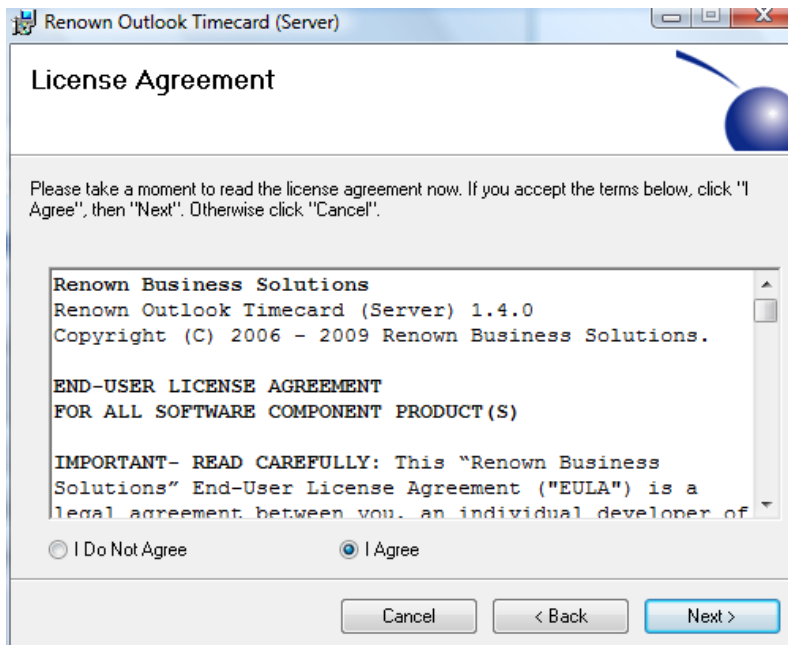
Install Renown Outlook Calendar Timecard Application (Server component)

Server Components (SL V6.5x / V7.0x)		Type	Microsoft Page
Windows DotNetFx (DotNet Framework)	27 MB	Zip	.NET Framework 2.0
Server Components (Office 2003 & 2007)	1.4MB	Zip	

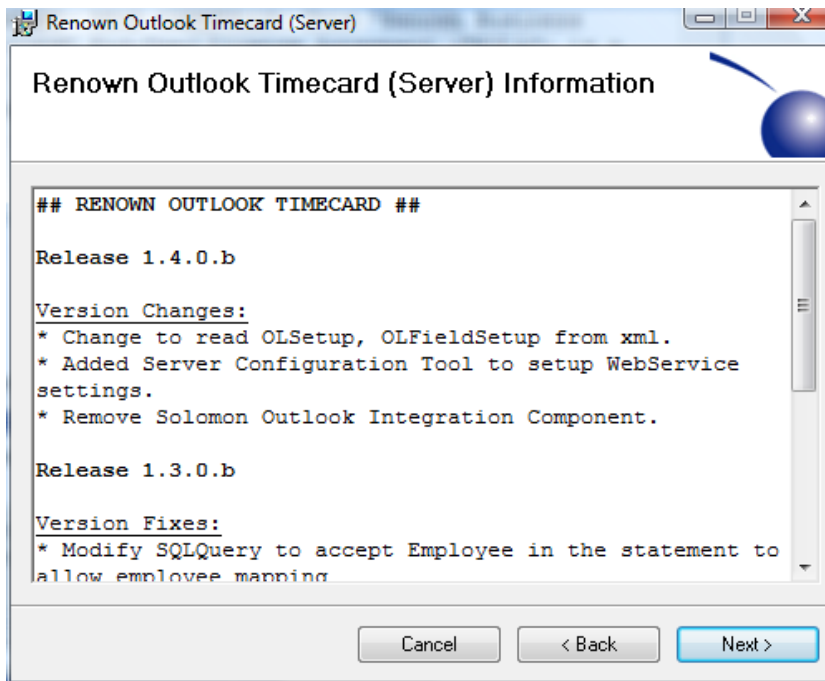
1. Download the Outlook Calendar Timecard Server Component from the [Renown software website](#). The installation wizard will launch. Click **Next**.



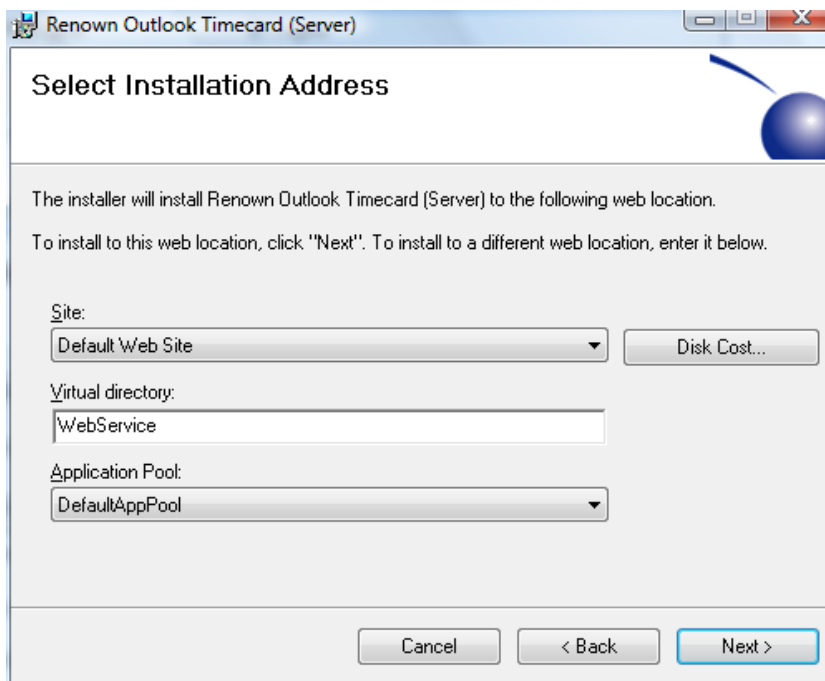
2. Read the License Agreement and select **I Agree**. Click **Next**.



3. This screen provides a summary update for any new releases. Click **Next**.



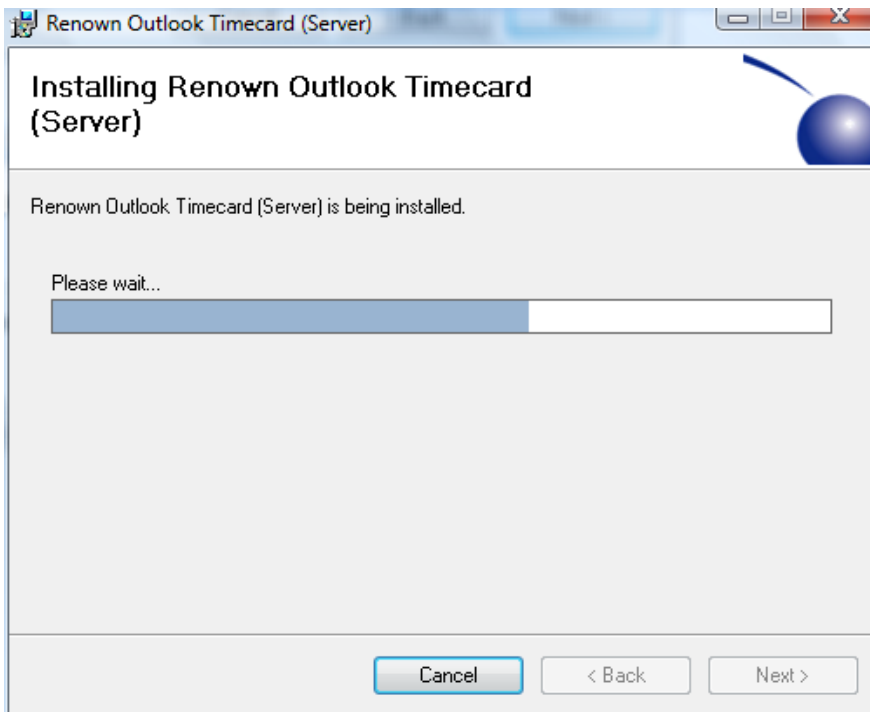
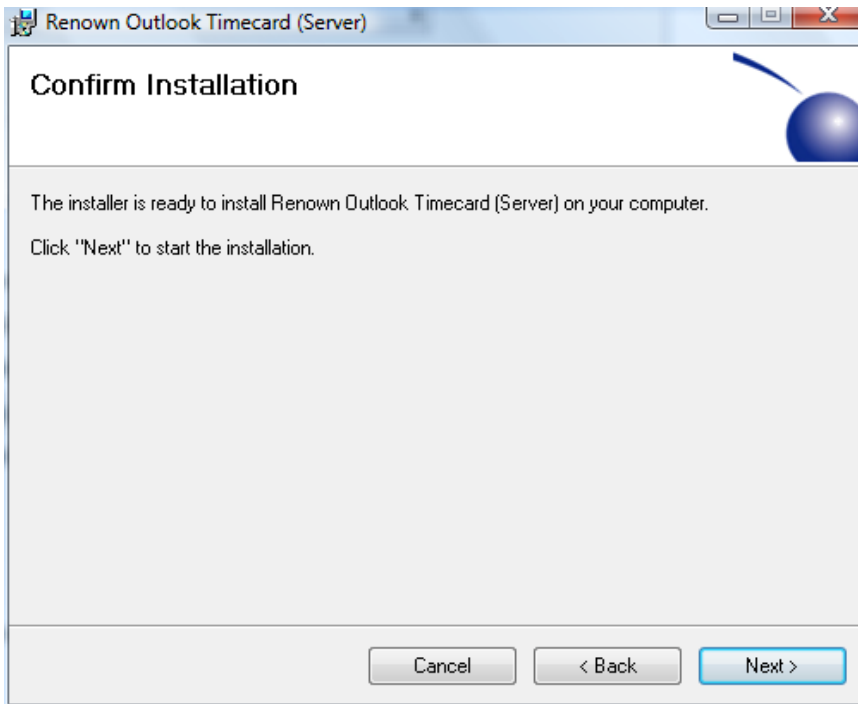
4. Select the Installation Address for Outlook Calendar Timecard.



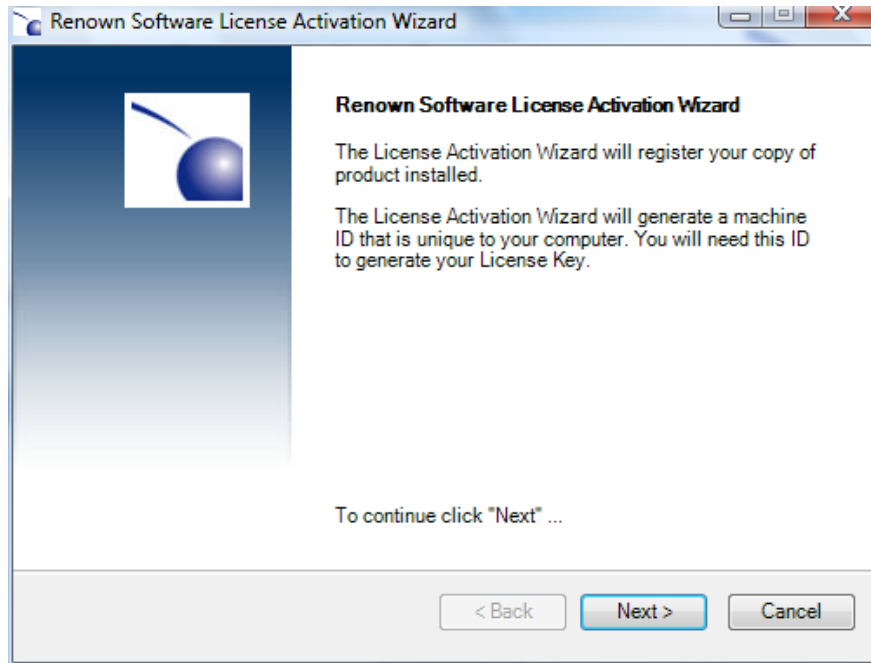
Note: Windows XP will only allow one website per computer. Windows Server 2003/2008 allows multiple websites per server.

Site Select the Site Outlook Timecard Calendar is to be installed in (as created in the step above).
Virtual Directory Unless the install is to be done under a sub-directory of a website, leave this blank.
Application Pool Unless user wants to define, leave blank.

5. Once the settings have been configured, click **Next** to start the installation.



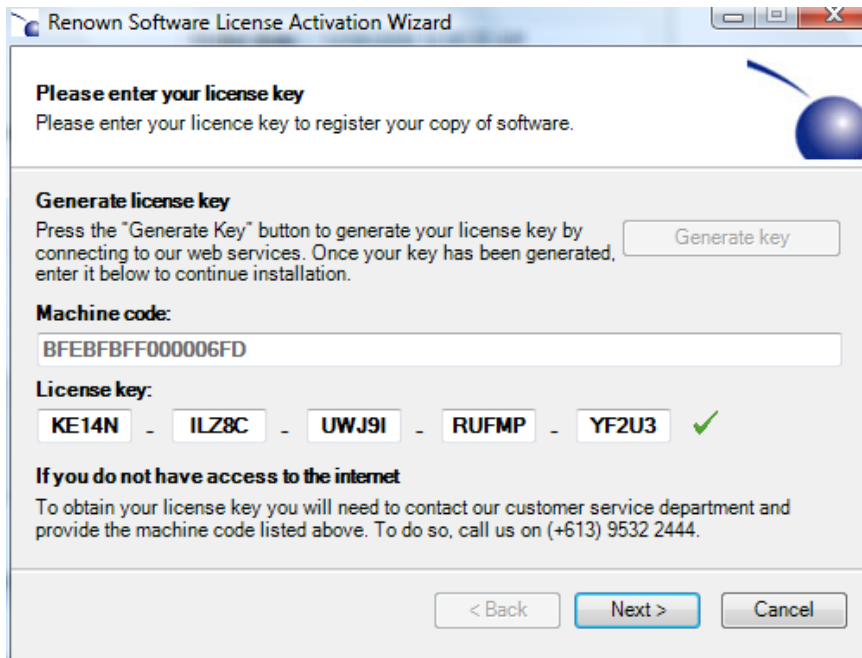
6. A License Activation Wizard will launch to help with the registration of Outlook Calendar Timecards. Click **Next**.



7. There are several options to help register Renown's Outlook Calendar Timecard.

Option 1 – License key available

If you already have a license key, enter the keys in the **License key** column and click **Next**.



Option 2 – No License keys but have Customer ID and Order ID

- a. Click on **Generate key**

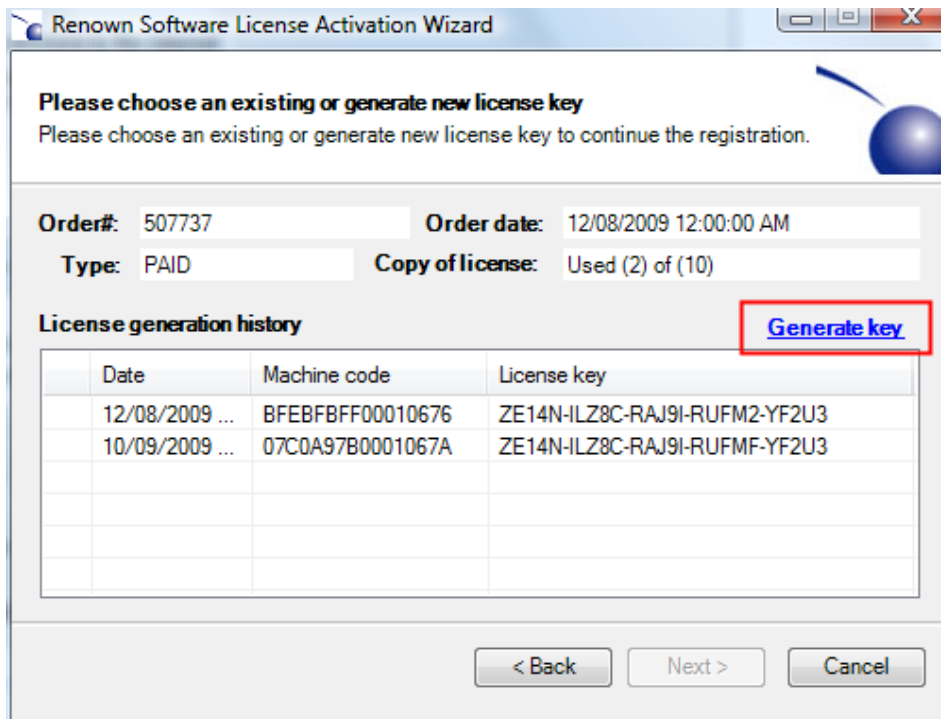
The screenshot shows the 'Renown Software License Activation Wizard' window. The title bar reads 'Renown Software License Activation Wizard'. The main content area has the heading 'Please enter your license key' and the instruction 'Please enter your licence key to register your copy of software.' Below this is a section titled 'Generate license key' with the text: 'Press the "Generate Key" button to generate your license key by connecting to our web services. Once your key has been generated, enter it below to continue installation.' A button labeled 'Generate key' is highlighted with a red rectangle. Underneath is a 'Machine code:' field containing the text 'BFEBFBFF000006FD'. Below that is a 'License key:' field with five empty boxes separated by hyphens. At the bottom, there is a section titled 'If you do not have access to the internet' with instructions to contact customer service. Navigation buttons '< Back', 'Next >', and 'Cancel' are at the bottom right.

- b. Enter your **Customer ID** and **Order ID**. Click on **Validate Order**.

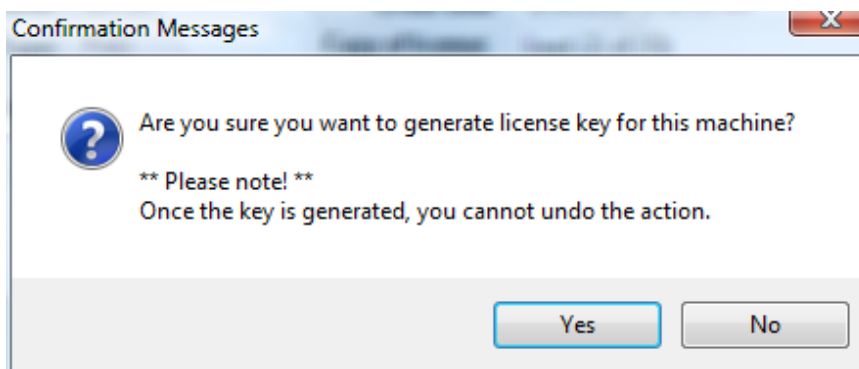
The screenshot shows the 'Renown Software License Activation Wizard' window at the 'Please enter your order information' step. The title bar reads 'Renown Software License Activation Wizard'. The main content area has the heading 'Please enter your order information' and the instruction 'Please enter your order information in order to continue generate the license key.' There are input fields for 'Customer Id:' (containing '111623') and 'Order Id:'. A 'Validate Order' button is visible. A modal dialog box titled 'Connecting Webservice' is overlaid on the form, containing a loading icon and the text 'This will take a while, please wait ...'. Below the dialog, there is a section '(or) Request FREE Evaluation' with input fields for 'First name:', 'Last name:', 'Company:', and 'Email Address:'. A 'Request Now' button is at the bottom right of this section. Navigation buttons '< Back', 'Next >', and 'Cancel' are at the bottom of the window.

c. The following screen will launch asking if you require new registration keys or to use your existing ones.

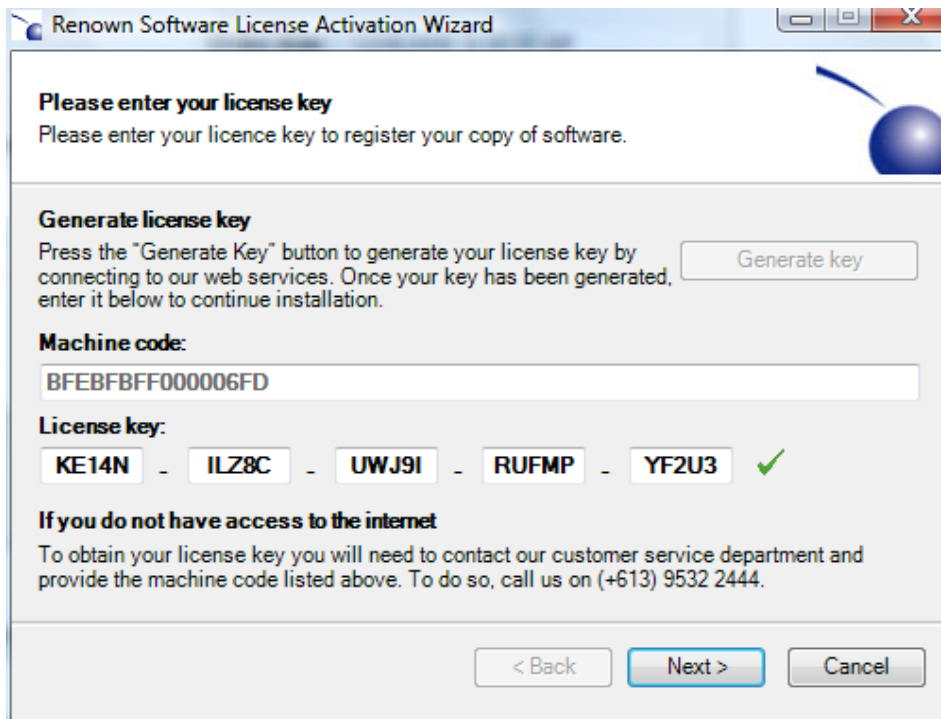
Click on **Generate key**.



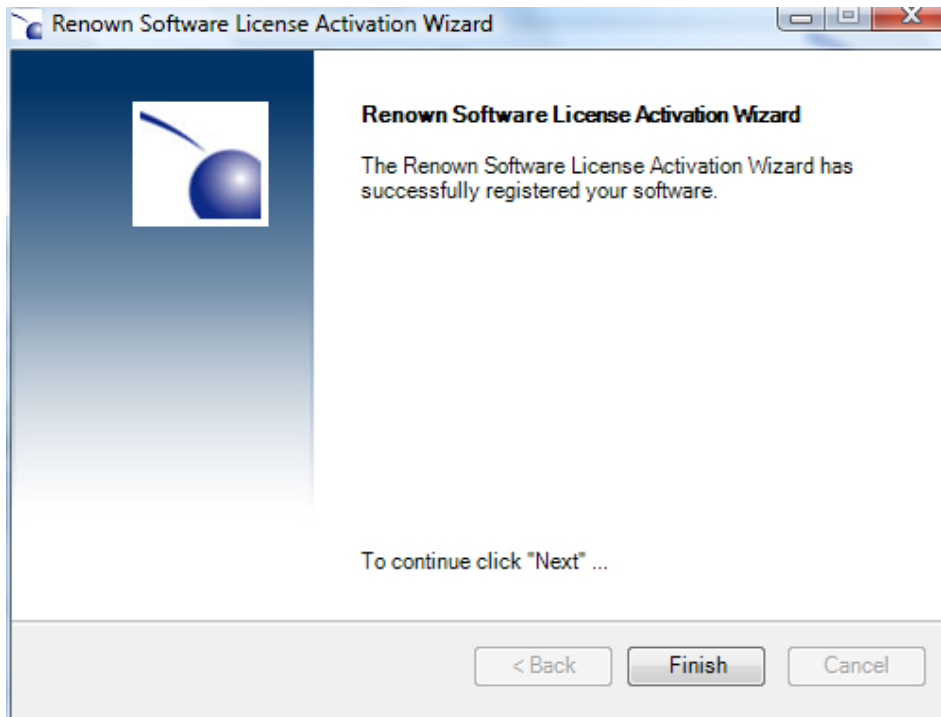
d. Click **Yes** to continue.



- e. Once the keys are generated it will take you back to the original License Activation Wizard. Click **Next**.



- f. Click **Finish** to complete the software registration.



Option 3 – New user with no License key, Customer ID or Order ID

- a. Click on **Generate key**

Renown Software License Activation Wizard

Please enter your license key
Please enter your licence key to register your copy of software.

Generate license key
Press the "Generate Key" button to generate your license key by connecting to our web services. Once your key has been generated enter it below to continue installation.

Machine code:
BFEBFBFF000006FD

License key:
- - - - -

If you do not have access to the internet
To obtain your license key you will need to contact our customer service department and provide the machine code listed above. To do so, call us on (+613) 9532 2444.

< Back Next > Cancel

- b. Enter details in **Request FREE Evaluation** with a valid email address as shown below and click **Request Now**.

Renown Software License Activation Wizard

Please enter your order information
Please enter your order information in order to continue generate the license key.

Customer Id: **Order Id:**

Validate Order

* Upgrading? Contact sales@renown.com.au or (+613) 9532 2444

(or) Request FREE Evaluation

First name: Jocelyn Last name: Teh

Company: Renown Business Solutions

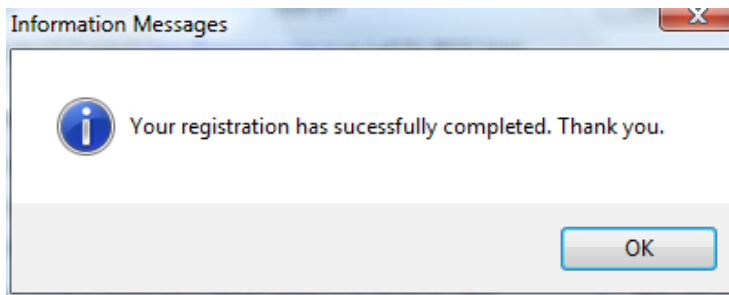
Email Address: sales@renown.com.au

* Did not receive registration detail? Make sure email is valid.
* Problems? Contac support@renown.com.au or (+613) 9532 2444

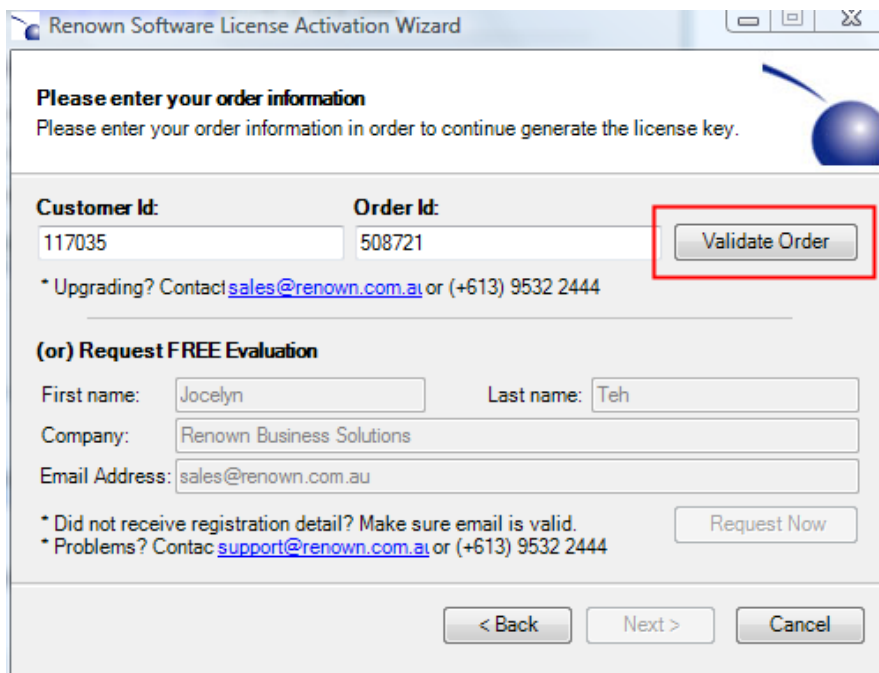
Request Now

< Back Next > Cancel

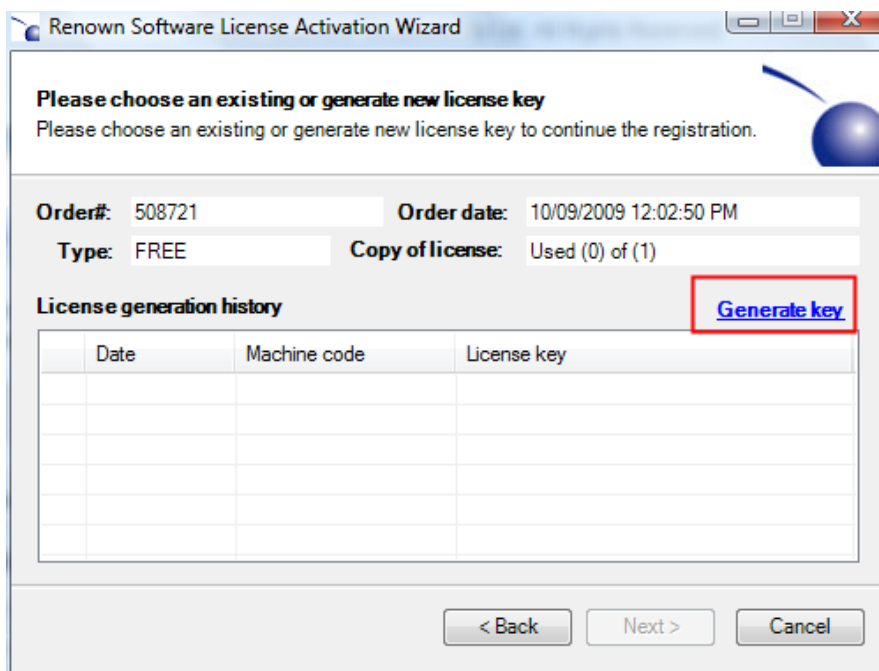
- c. You will be notified that your request has been successful. Click **OK** to continue.



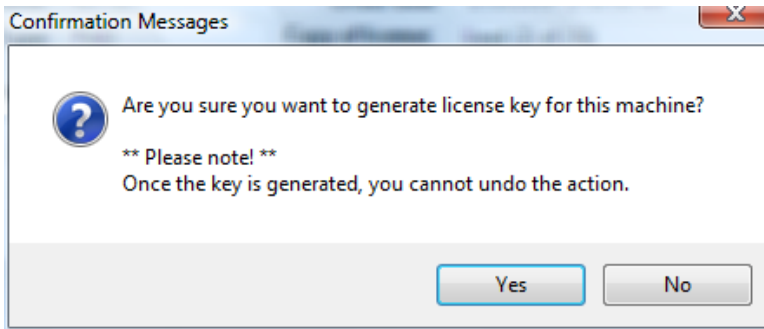
- d. You will see that the Customer ID and Order ID fields have been populated. Click on **Validate Order**.



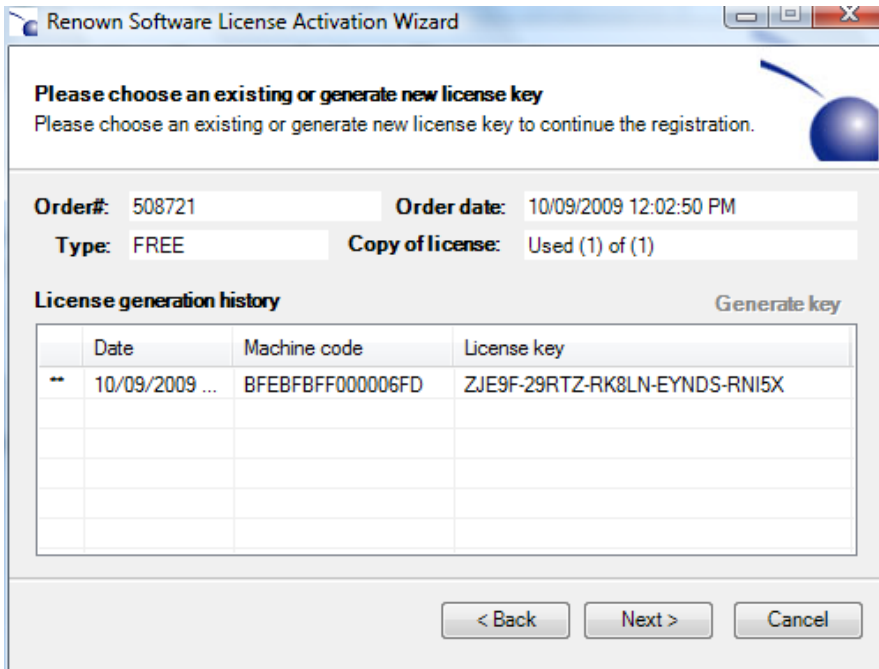
- e. Click on **Generate key**



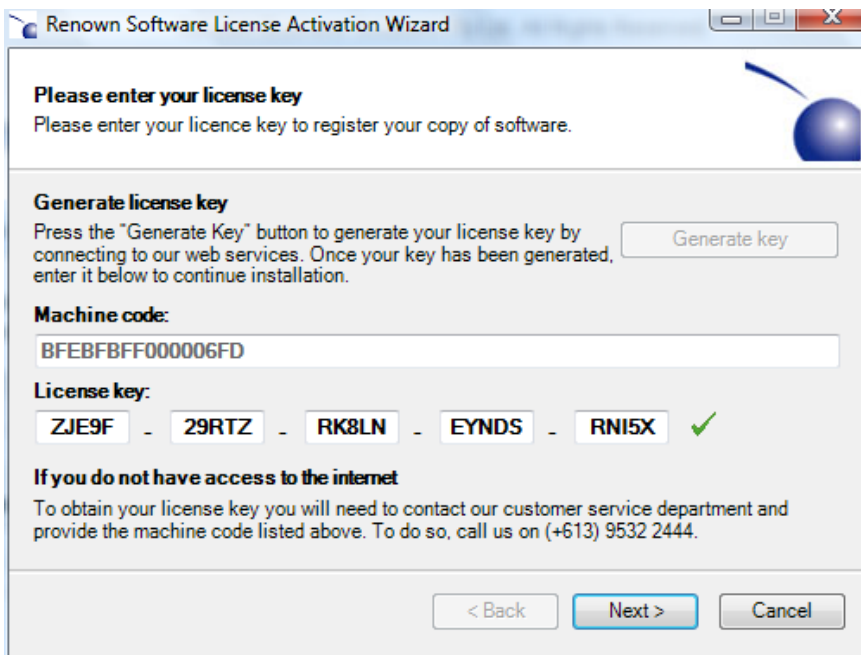
- f. Click **Yes** to continue.



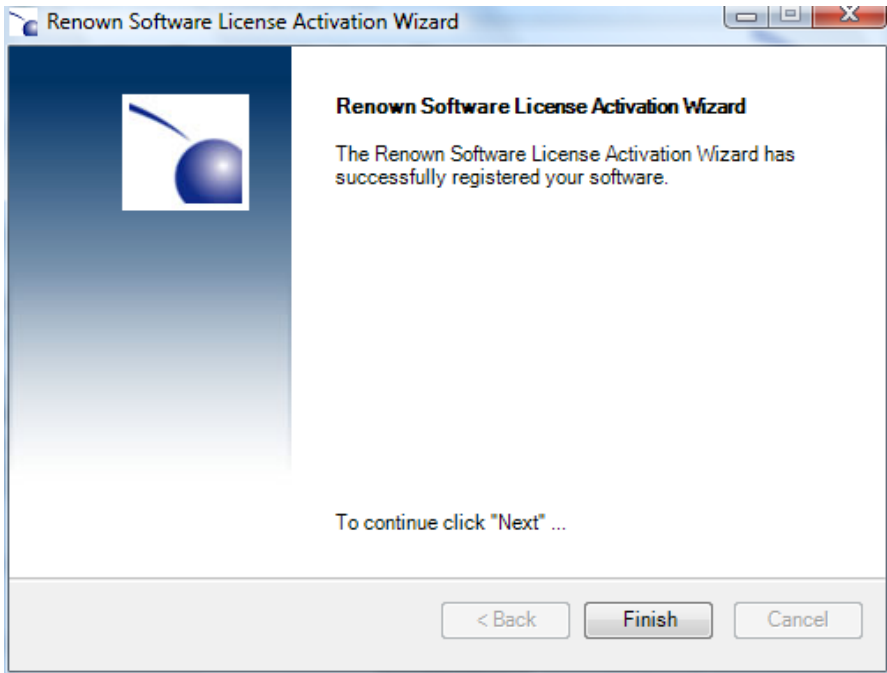
- g. When the License key has been created, click **Next**.



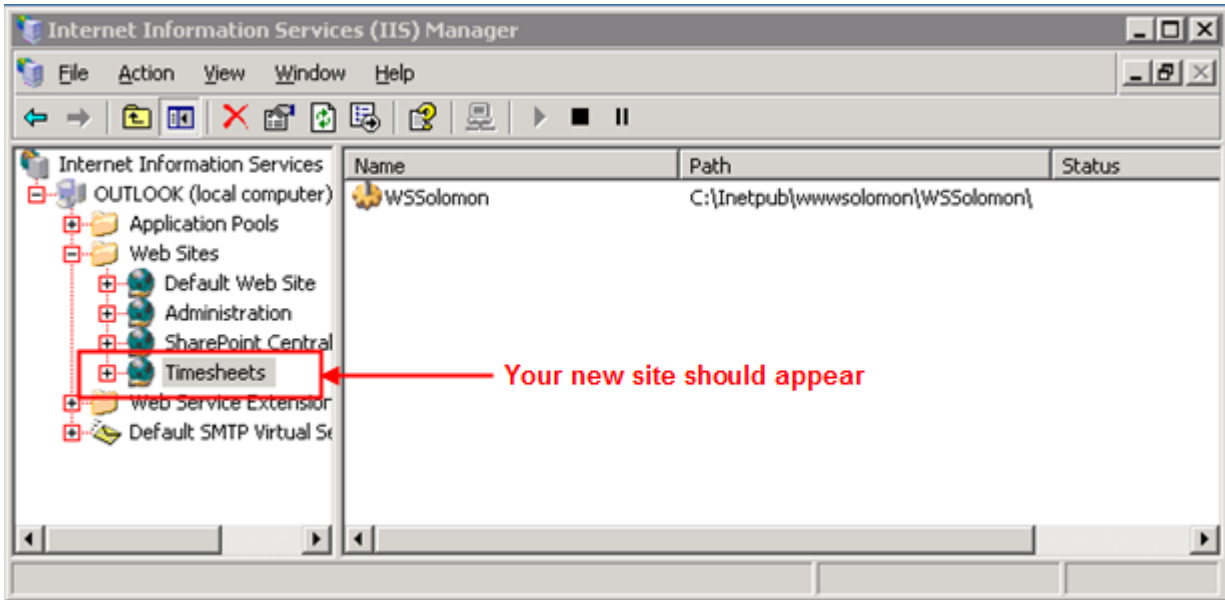
- h. The newly created License keys will populate the appropriate fields. Click **Next**.



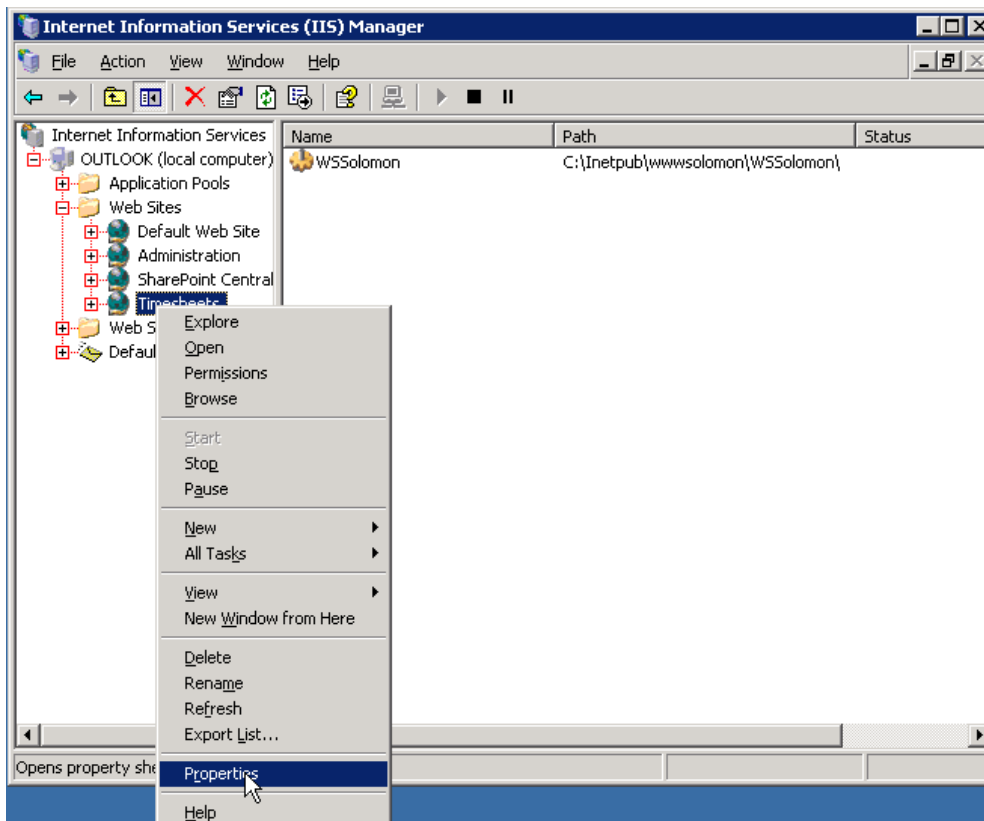
- i. Click **Finish** to complete the software registration.



- 8. Return to IIS and locate your newly created Web Site.



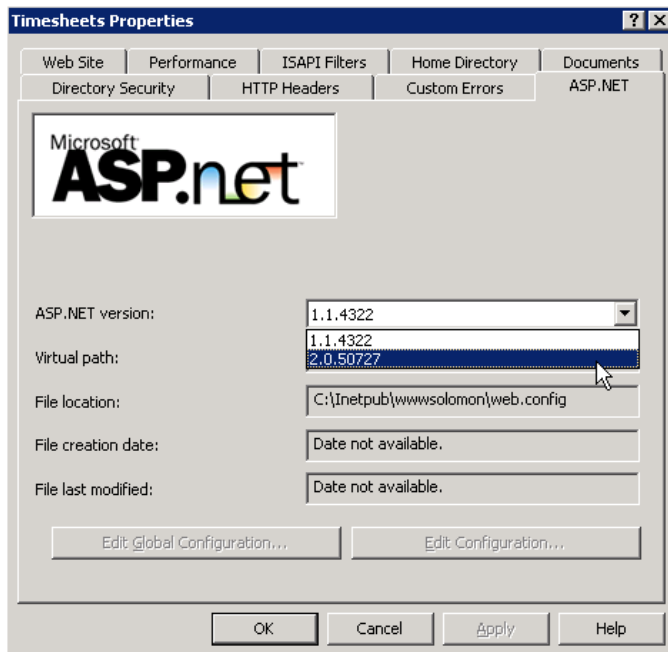
9. Right click on the website you created and open the **Properties** window.



10. Setting the ASP.NET Version for the Timescard Web Site

Click on the ASP.NET tab and select ASP.NET version 2.0.50727 from the drop-down selection list.

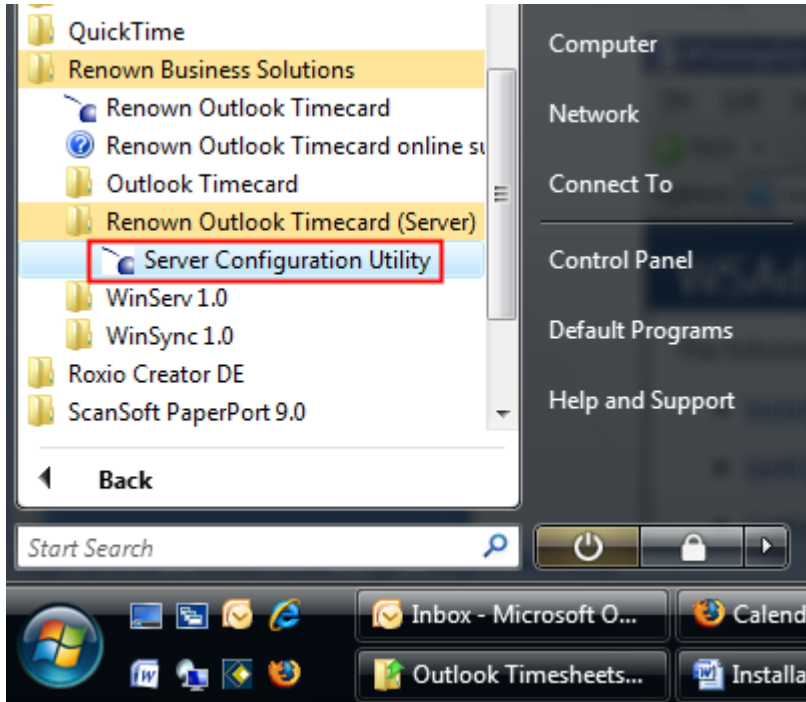
11. Click **Apply** and **OK** to exit.



Note: The ASP.NET tab will not appear until you have run the Renown Timescard Server installation.

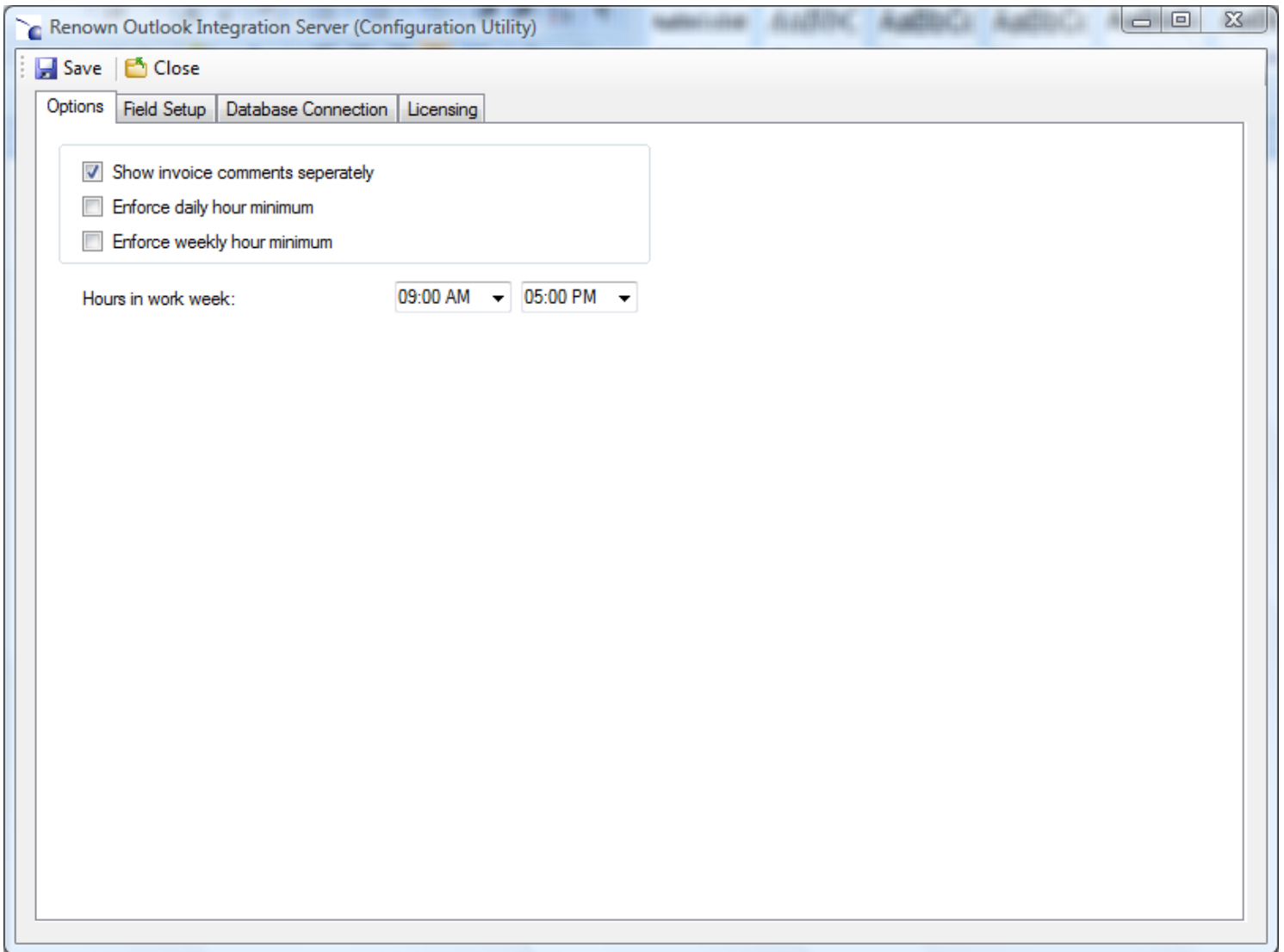
Server Component Setup and Configuration

1. Browse to the Outlook Timecard folder and launch **Server Configuration Utility**



Windows Vista screenshot.

2. In the Options tab, setup how Microsoft Dynamics SL would handle the following options.



3. Field Setup tab sets the visibility and requirement of the Appointment Detail. Example shown below.

Renown Outlook Integration Server (Configuration Utility)

Save Close

Options Field Setup Database Connection Licensing

#	Field	Description	Required	Visible	Enabled	Field Type	Default Value
1	Description	Description	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Text	
2	Project	Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Drop Down	
3	Task	Task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Drop Down	
4	Labor Class	Labor Class	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Drop Down	
5	GL Account	GL Account	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Drop Down	
6	GL Subaccount	GL Subaccount	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Drop Down	
7	Company ID	Company Id	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Drop Down	
8	Union Code	Union Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Drop Down	
9	Work Type	Work Type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text	
10	Cert PR Flag	Cert PR Flag	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Check Box	
11	Group Code	Group Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text	
12	Workers Comp Cd	Workers Comp Cd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Drop Down	
13	Billable	Billable	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Check Box	
14	OT Type	OT Type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Drop Down	
15	Shift	Shift	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Drop Down	
16	Estimate to Comp	Est to Complete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Float	

Outlook Timecard - Appointment Details

Save Cancel

Subject: Timecard Setup

Location: Office Keep synchronized with Outlook

Start Time: 7/09/2009 9:30 AM

End Time: 7/09/2009 10:00 AM

Appointment Job Information Appointment Times

Subject: Timecard Setup

Project:

Task:

Labor Class:

GL Account: COS Labour (2110)

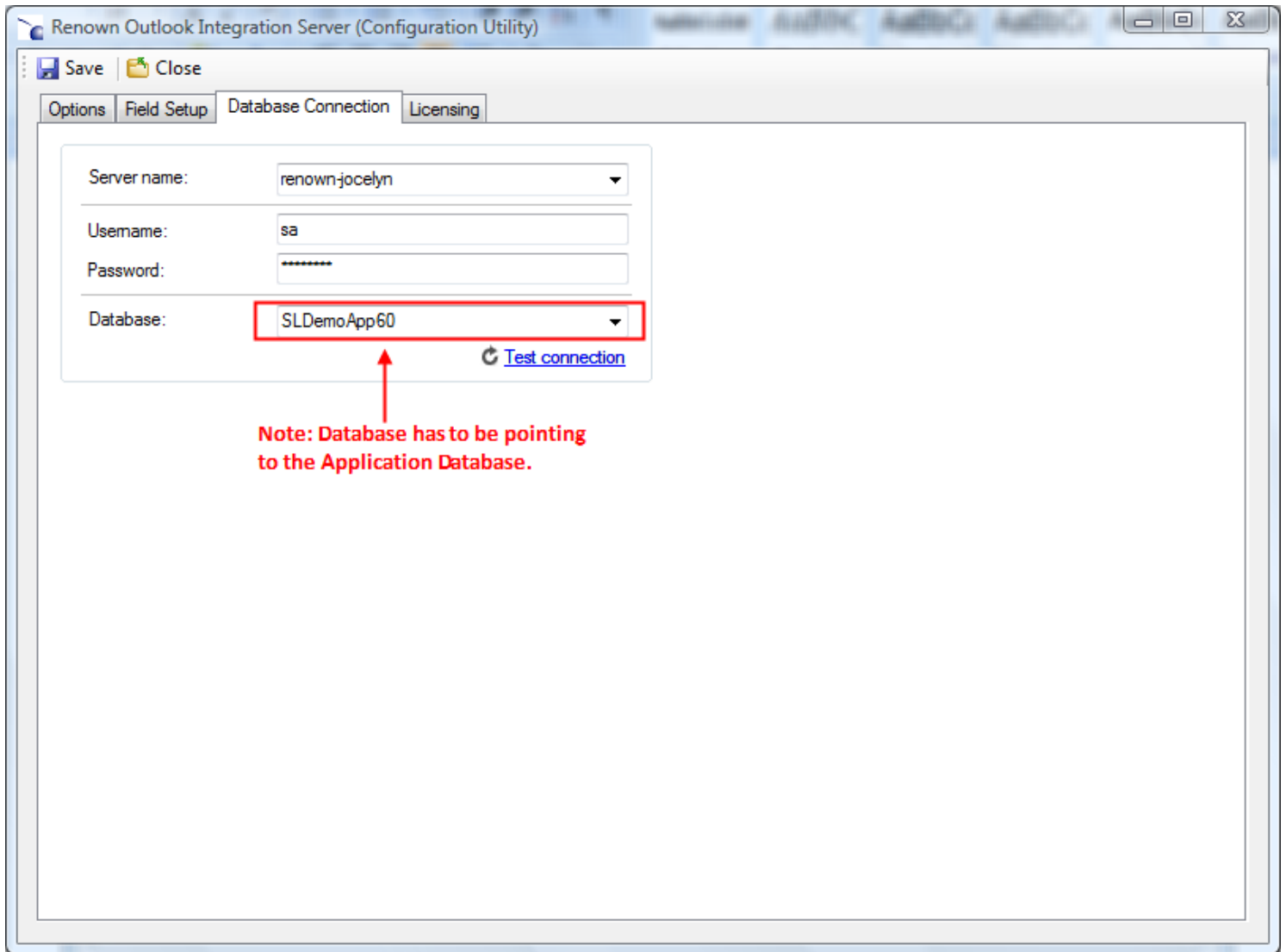
GL Subaccount: Default JT VIC (00JT01)

Company Id: Renown Business Solutions (RBS)

Billable:

Invoice Comments

4. Fill in the configuration information pertinent to your server in the Database Connection tab. Click **Next**.
Note: We do not recommend using the 'sa' user for production installation.

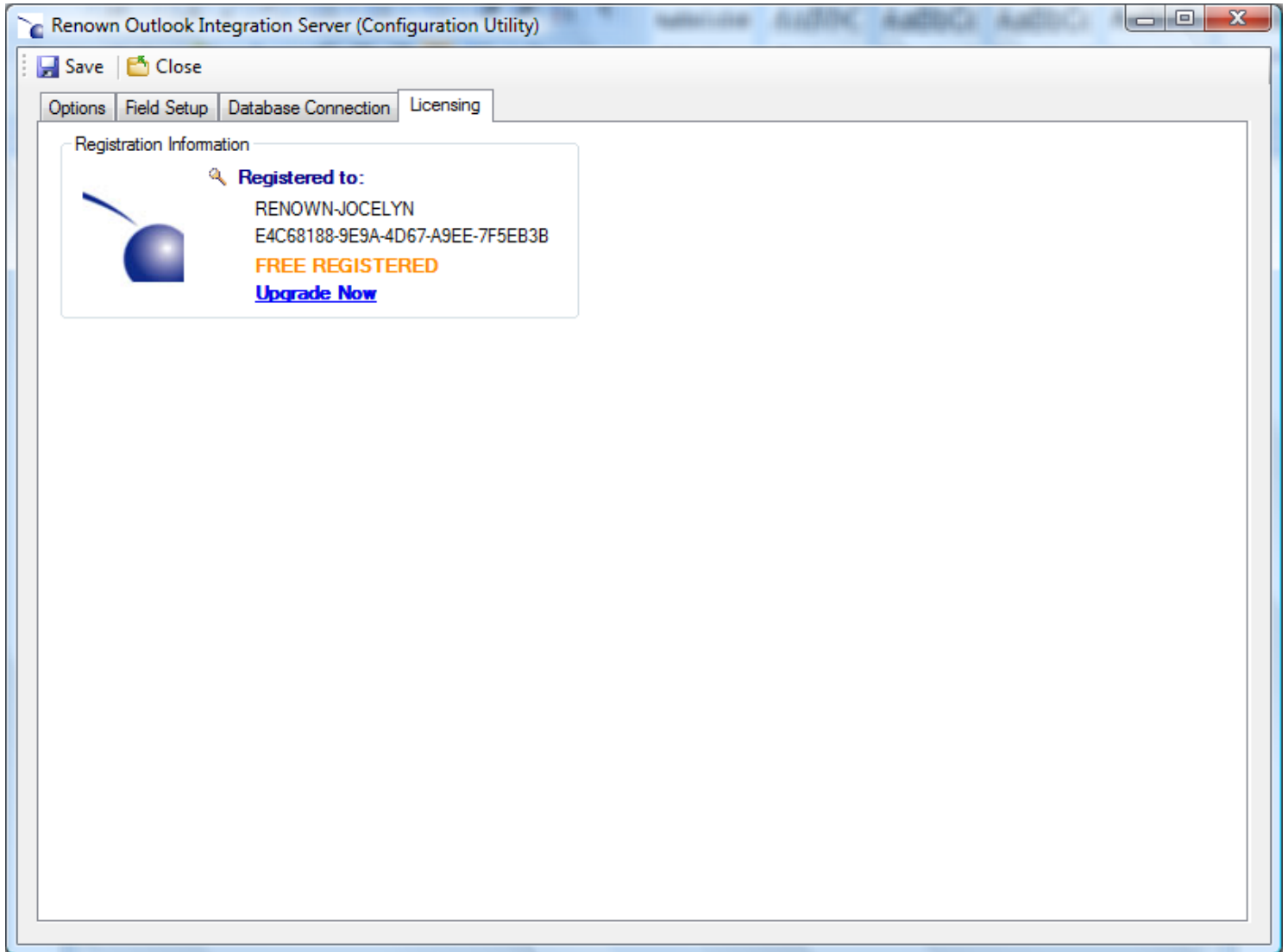


The screenshot shows the 'Renown Outlook Integration Server (Configuration Utility)' window. The 'Database Connection' tab is active. The configuration fields are as follows:

Server name:	renown-jocelyn
Username:	sa
Password:	*****
Database:	SLDemoApp60

A red box highlights the 'Database' dropdown menu, which currently shows 'SLDemoApp60'. A red arrow points from a red note below to this dropdown. The note reads: **Note: Database has to be pointing to the Application Database.** To the right of the 'Database' field is a 'Test connection' button with a refresh icon.

5. Licensing tab provides summary information of the product registration.
If you would like to upgrade your trial copy to be fully licensed, click on **Upgrade Now** or contact us at sales@renown.com.au.



Validate Timecard Web Site is functioning correctly

1. Validate the installation by browsing to the following URL:

<http://localhost:88/WSSolomon/Data.asmx> where;

88 Port number chosen when website in IIS was defined

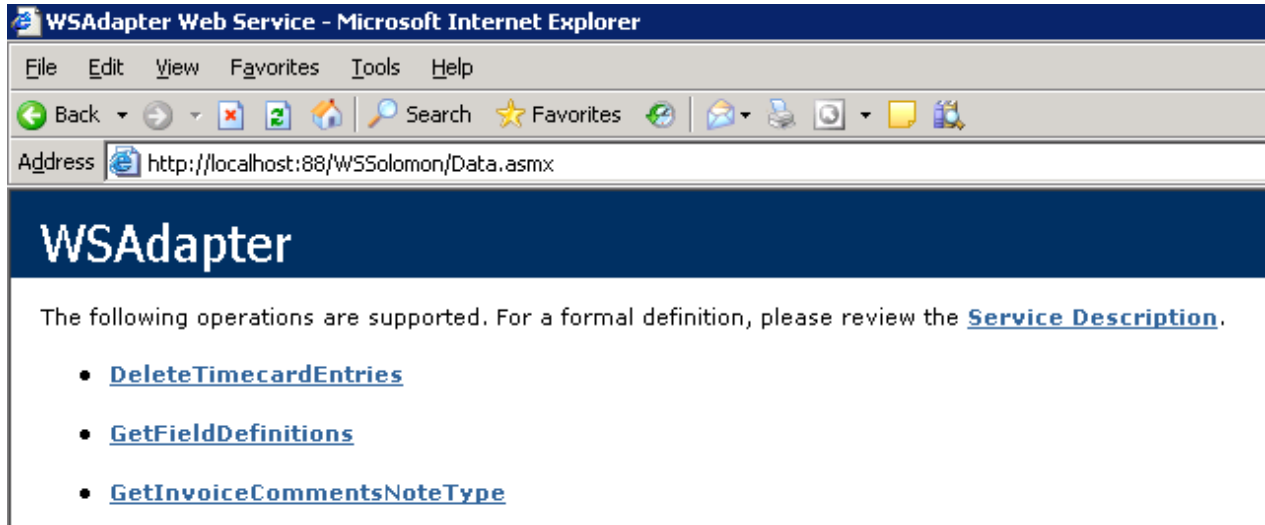
WSSolomon Virtual directory name entered in Step 5 of 'Install Renown Outlook Calendar Timecard Application'

The structure is <http://localhost:port/virtualdirectoryname/data.asmx> (on the IIS Server)

The structure is <http://servername:port/virtualdirectoryname/data.asmx> (elsewhere)

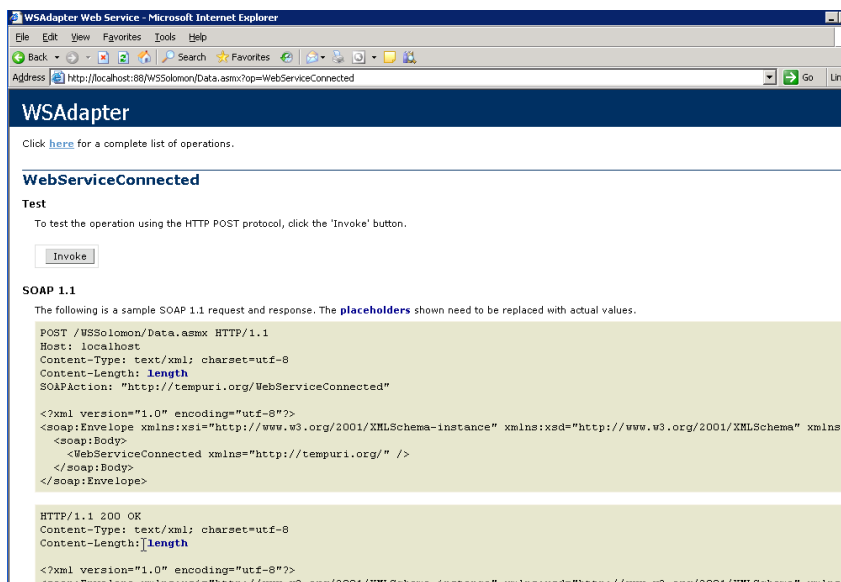
Replace the '88' with the port number you chose to create your website on, and 'WSSolomon' with the Virtual Directory name you entered above.

2. The page should return as below.

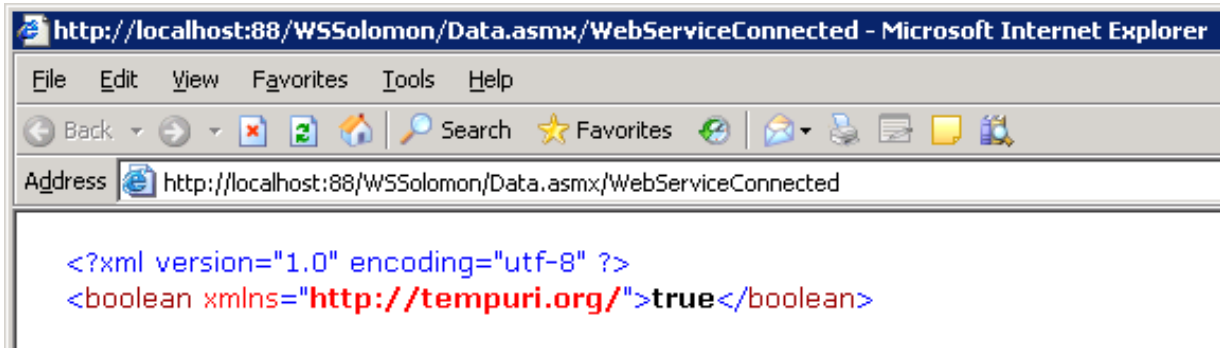


If it does not return the above or you are getting error messages, it is likely a mistake has been made in the steps above.

3. At the bottom of the list of links is a link 'Web Service Connected'. Click the link.
4. On the next screen, click the **Invoke** button.



5. A new IE window will launch, check for the word 'true' as shown below shown in the link below. This confirms the web service is connected to the database.



This completes the Server installation for Renown Outlook Calendar Timecard.

Client Installation

Client Components 2003 (SL V6.5x / V7.0x)	Size	Type	Microsoft Page
Windows DotNetFx (DotNet Framework)	27MB	Zip	.NET Framework 2.0
Office 2003 PIA	5 MB	Zip	Primary Interop Assemblies
VSTOSE Runtime	2 MB	Zip	Visual Studio Tools for Office
Renown Calendar Timecards Client	-	Website	
Renown Outlook Add-in	-	Website	

Client Components 2007 (SL V6.5x / V7.0x)	Size	Type	Microsoft Page
Windows DotNetFx (DotNet Framework)	27MB	Zip	.NET Framework 2.0
Office 2007 PIA	6 MB	Zip	Primary Interop Assemblies
VSTOSE Runtime	2 MB	Zip	Visual Studio Tools for Office
Renown Calendar Timecards Client	-	Website	
Renown Outlook Add-in	-	Website	

1. Download the Outlook Calendar Timecard Client Component from the [Renown software website](#). The website will launch. Click **Install**.

Renown Business Solutions Renown Outlook Timecard

Name: Renown Outlook Timecard

Version: 1.7.0.45

Publisher: Renown Business Solutions

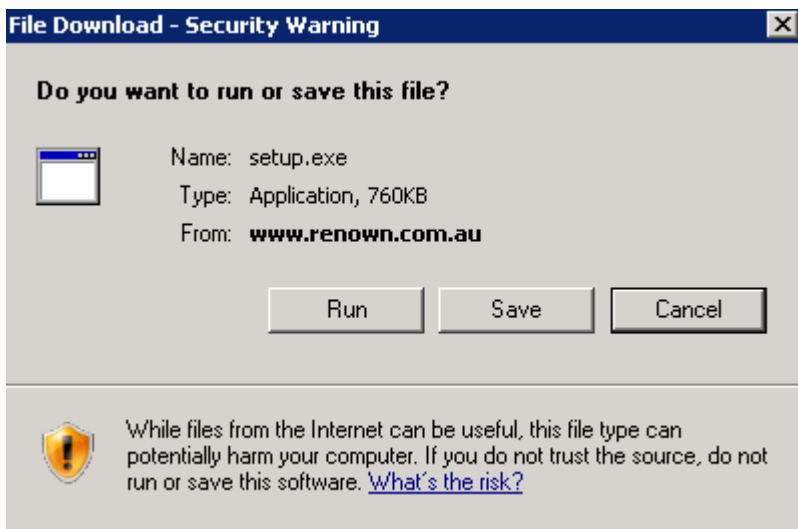
The following prerequisites are required:

- Microsoft Data Access Components 2.8
- Windows Installer 3.1
- .NET Framework 3.5 SP1
- Microsoft Office 2007 Primary Interop Assemblies

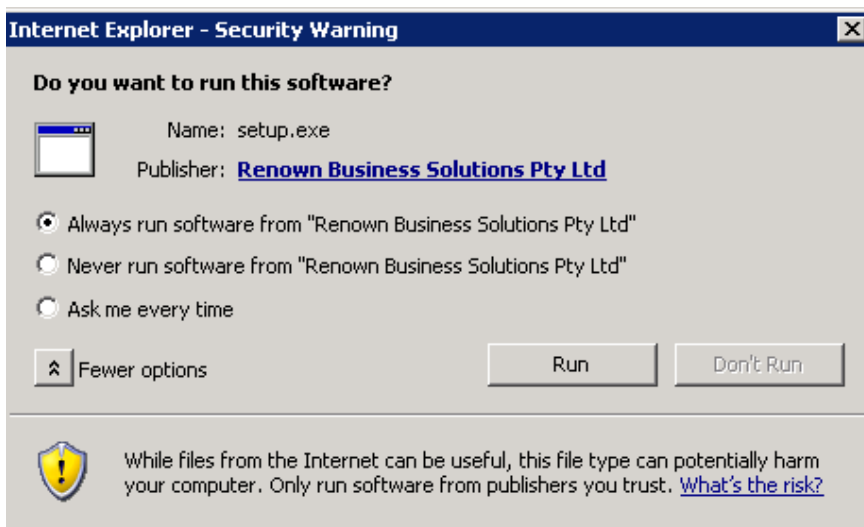
If these components are already installed, you can [launch](#) the application now. Otherwise, click the button below to install the prerequisites and run the application.

Install

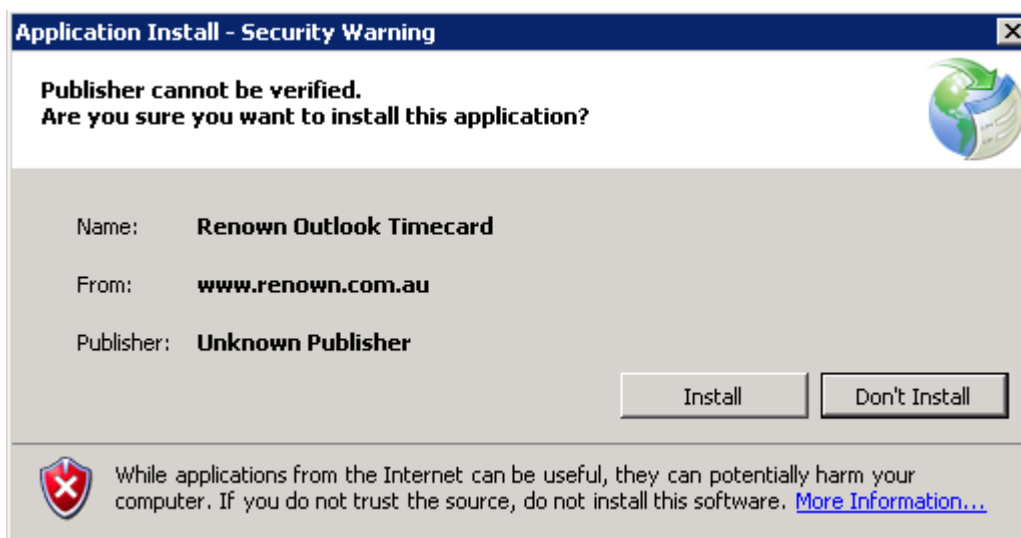
2. Click **Run** to start installing the Client component.

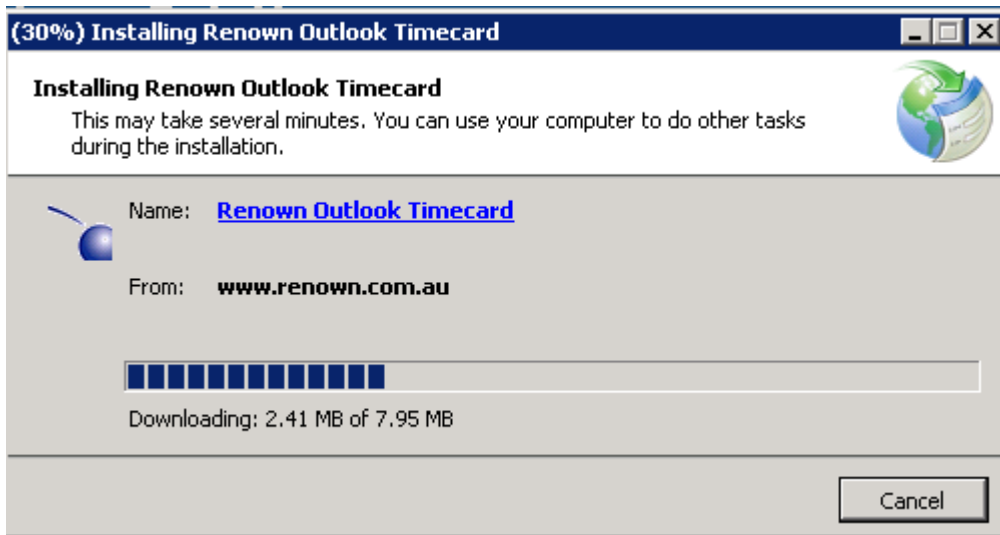


3. Click on **Run** to continue with installation.



4. There will be a warning that Publisher cannot be verified, click on **Install**.

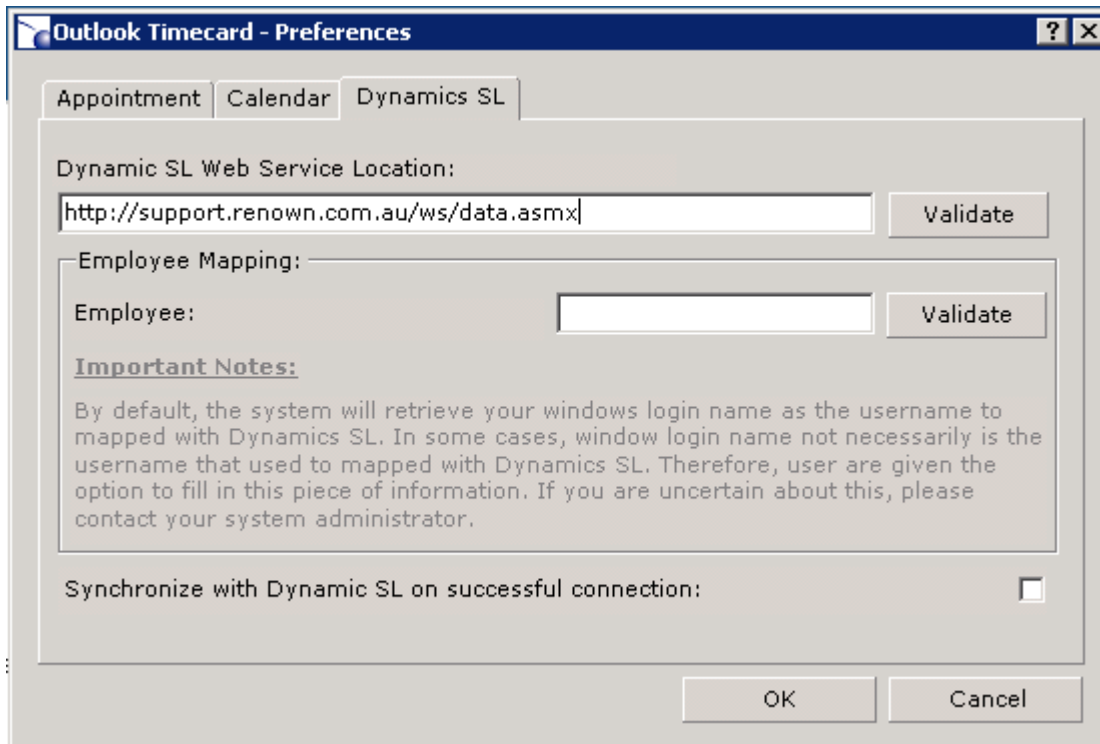




5. Enter the URL of the data.asmx file installed on the server.
This is the same URL you entered to test the installation on the server, with the actual server name replacing 'localhost'.

The structure is <http://servername:port/virtualdirectoryname/data.asmx>

Click **Validate** the Web Service Location and **OK** when completed.



This completes the Client installation for Renown Outlook Calendar Timecard.

Setup the Renown Outlook Calendar Timecard Application

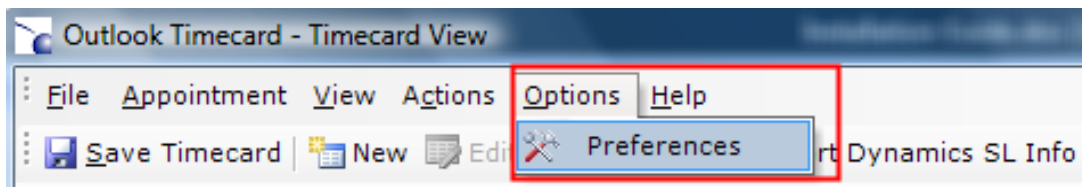
By default, the Outlook Timecard Client will use the Windows Domain logon to map the Dynamics SL Employee ID or User ID.

Eg: Domain Username 'domain\dchee' and in Dynamics SL Employee/User ID has to be 'dchee'.

The screenshot shows the 'Employee and Resource Maintenance (PA.EMP.00)' window. The 'ID#' field is highlighted with a red box and contains the value '47'. The 'User ID' field is also highlighted with a red box and contains the value 'DCHEE'. Other visible fields include Name/Description 'Dennis Chee', Person/Resource 'Person', Status 'Active', Emp Type 'PROG', Hire Date '17/08/2006', Company ID 'RBS', and various other employee details.

If however the Windows Domain username and Dynamics SL Employee/User ID are different, the following setup will have to be done.

1. Run Renown Outlook Timecard
2. Open the **Preference** screen located on the menu bar under **Options**.



3. Click on the **Dynamics SL** tab.

The screenshot shows the 'Outlook Timecard - Preferences' dialog box with the 'Dynamics SL' tab selected. The 'Synchronize with Dynamic SL on successful connection' checkbox is unchecked. The 'Employee Mapping' section contains an 'Employee:' text box and a 'Validate' button. Below this is an 'Important Notes' section with explanatory text. At the bottom, the 'Dynamic SL Web Service Location' text box contains the URL 'http://support.renown.com.au/ws/data.asmx'. 'OK' and 'Cancel' buttons are at the bottom right.

4. Enter the Dynamics SL Employee or User ID and click **Validate**.

This screenshot is identical to the previous one, but the 'Employee' text box now contains the number '47'. A red rectangular box highlights the 'Employee' text box and the 'Validate' button. The rest of the dialog box, including the 'Important Notes' and 'Dynamic SL Web Service Location' fields, remains the same.

Renown Outlook Add-in (Optional)

Client Components 2003 (SL V6.5x / V7.0x)	Size	Type	Microsoft Page
Windows DotNetFx (DotNet Framework)	27MB	Zip	.NET Framework 2.0
Office 2003 PIA	5 MB	Zip	Primary Interop Assemblies
VSTOSE Runtime	2 MB	Zip	Visual Studio Tools for Office
Renown Calendar Timecards Client	-	Website	
Renown Outlook Add-in	-	Website	

Client Components 2007 (SL V6.5x / V7.0x)	Size	Type	Microsoft Page
Windows DotNetFx (DotNet Framework)	27MB	Zip	.NET Framework 2.0
Office 2007 PIA	6 MB	Zip	Primary Interop Assemblies
VSTOSE Runtime	2 MB	Zip	Visual Studio Tools for Office
Renown Calendar Timecards Client	-	Website	
Renown Outlook Add-in	-	Website	

1. Download the Renown Outlook Add-in from the [Renown software website](#). The website will launch. Click **Install**.

Renown Business Solutions Renown Outlook AddIn for Microsoft Outlook 2007

Name: Renown Outlook AddIn for Microsoft Outlook 2007

Version: 1.0.0.10

Publisher: Renown Business Solutions

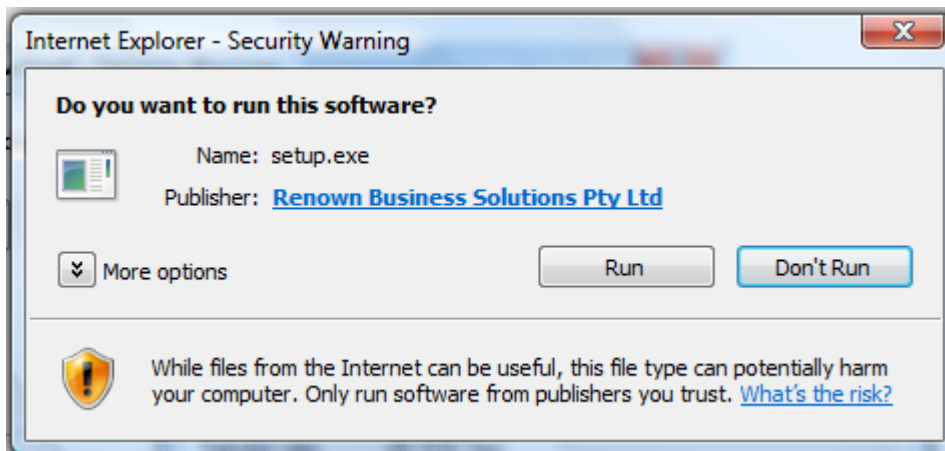
The following prerequisites are required:

- Windows Installer 3.1
- .NET Framework 3.5 Service Pack 1
- Visual Studio Tools for the Office system 3.0 Runtime Service Pack 1

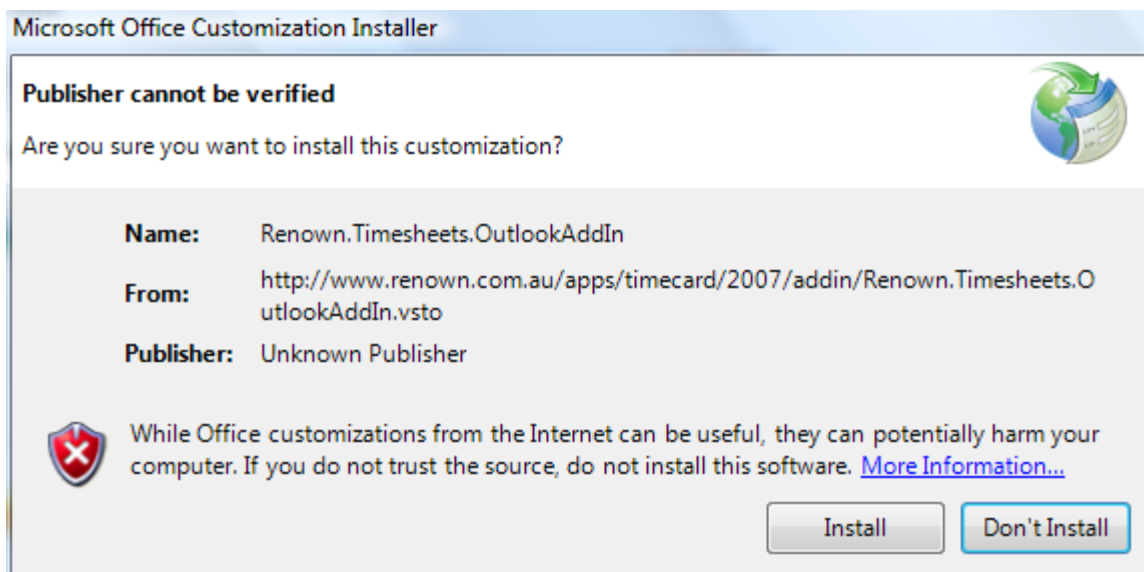
If these components are already installed, you can [launch](#) the application now. Otherwise, click the button below to install the prerequisites and run the application.



2. Click **Run**



3. There will be a warning that the Publisher cannot be verified, click **Install** to continue.



4. Click **Close** to complete the installation.

