



Atrio Calendar

Version 8

Installation and Configuration Guide

Table of Contents

Introduction	3
Requirements/Compatibility	3
Installing Atrio Calendar and Atrio Common	3
Installing Atrio Calendar and Atrio Common.....	3
Calendar Configuration	7
Import Task and Appointment Records.....	Error! Bookmark not defined.
Creating Custom Records	10
Product Key	12
Support	13
Disclaimer	13

Introduction

This document is designed as an introductory guide for Microsoft Dynamics CRM users to learn the basics of installing and setting up Atrio Calendar.

Atrio Calendar is a CRM solution that allows displaying any entity record in a calendar either by month, week, day or separated by ownership.

Features:

- Additional pane to show the calendar integrated in the Site Map
- Configurable to include any system or custom entity needed in the calendar
- Records to display selected by a FETCHXML query
- Holidays selected by a FETCHXML query
- Three different calendar skins to choose from
- An option to hide or display weekends
- Can display any user's calendar in the CRM without security permissions needed

Requirements/Compatibility

The Atrio Common solution is required to be imported into CRM for Atrio Calendar to load. Atrio Calendar is compatible with CRM 2016.

The following browsers are supported:

- Internet Explorer 10+
- Google Chrome 43+
- Safari 8.0.5+
- Firefox 38.0.5+

Atrio Calendar may work on previous browser versions, the mentioned versions have been tested and are known to work.

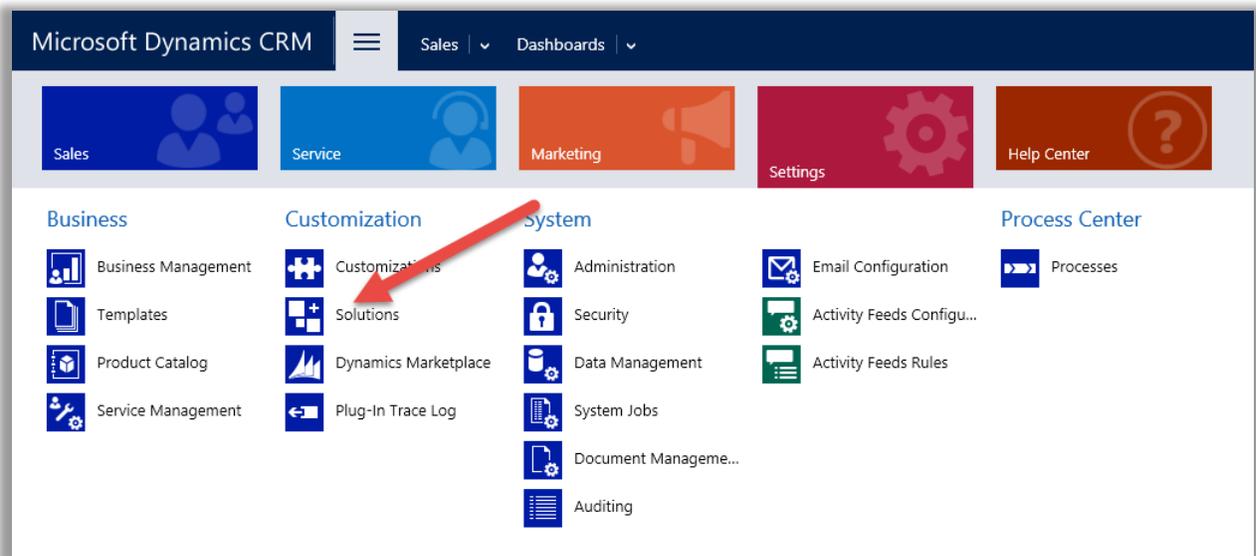
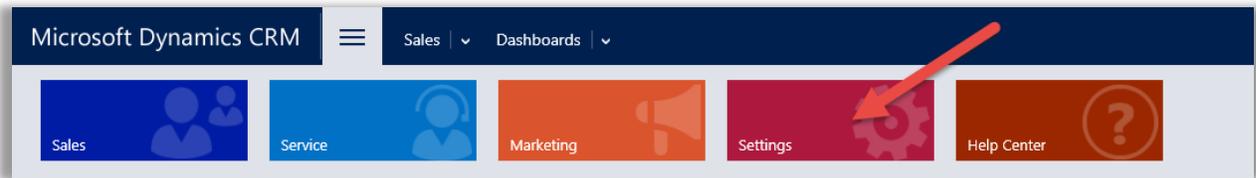
Installing Atrio Calendar and Atrio Common

Atrio Calendar is a Microsoft Dynamics CRM Managed Solution. Atrio recommends creating a backup solution before importing any solutions, and then importing the backup into CRM after the solutions have been imported.

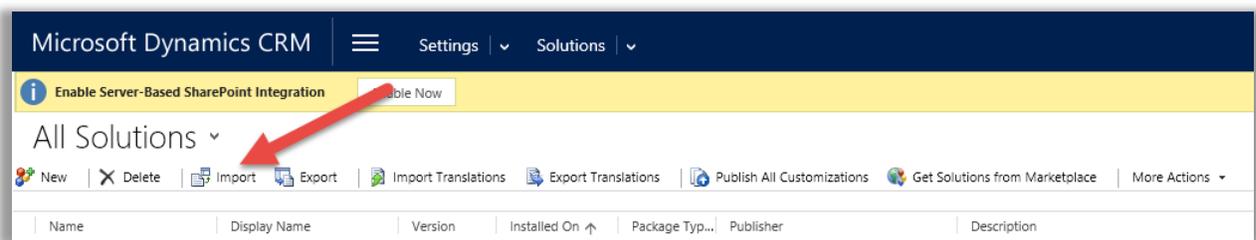
Installing Atrio Calendar and Atrio Common

Atrio Calendar is a Microsoft Dynamics CRM Managed Solution. Follow the below steps to install the solution:

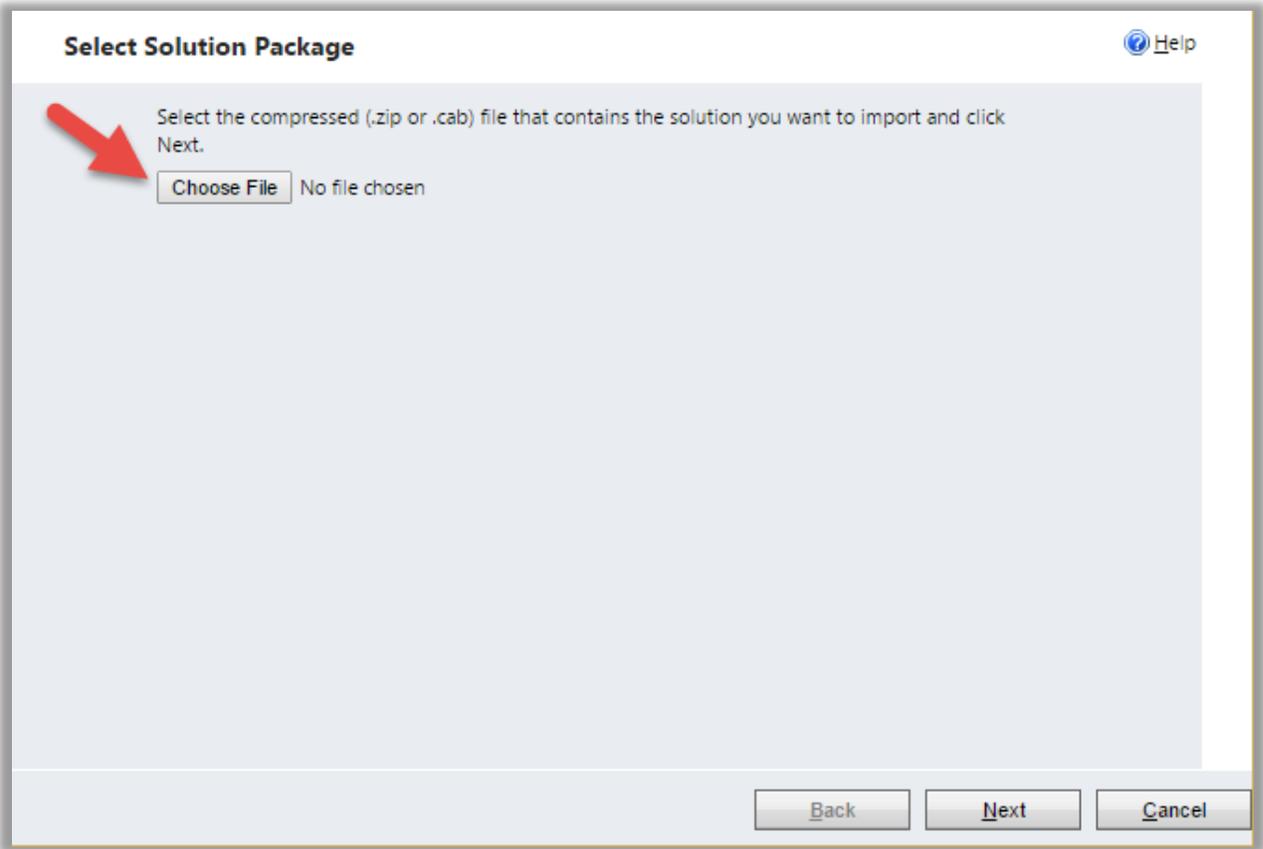
1. Navigate to **Settings -> Solutions**



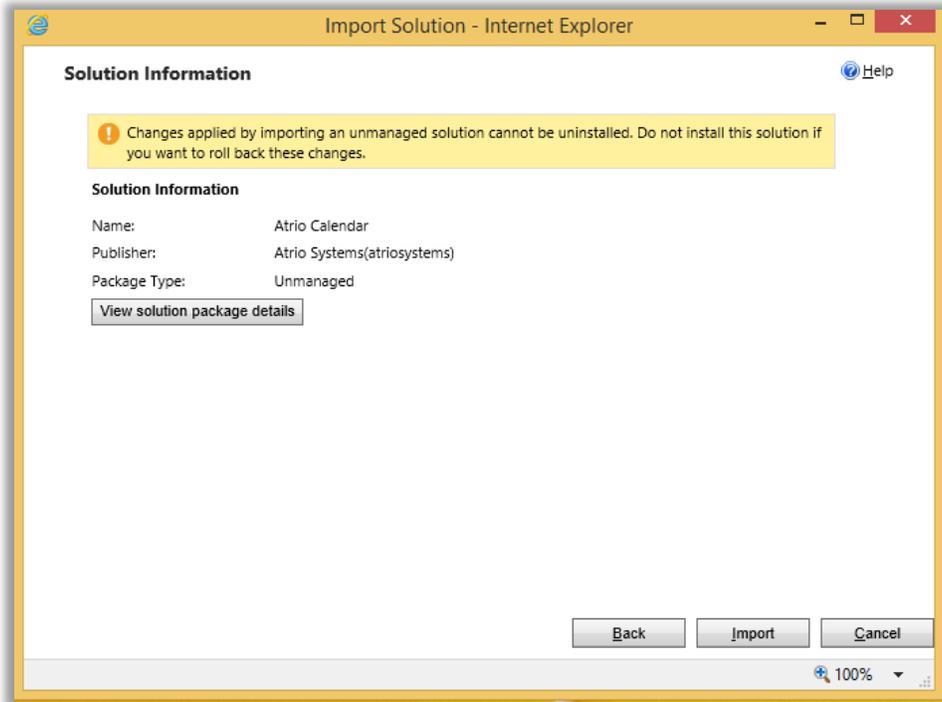
2. Click on **Import**.



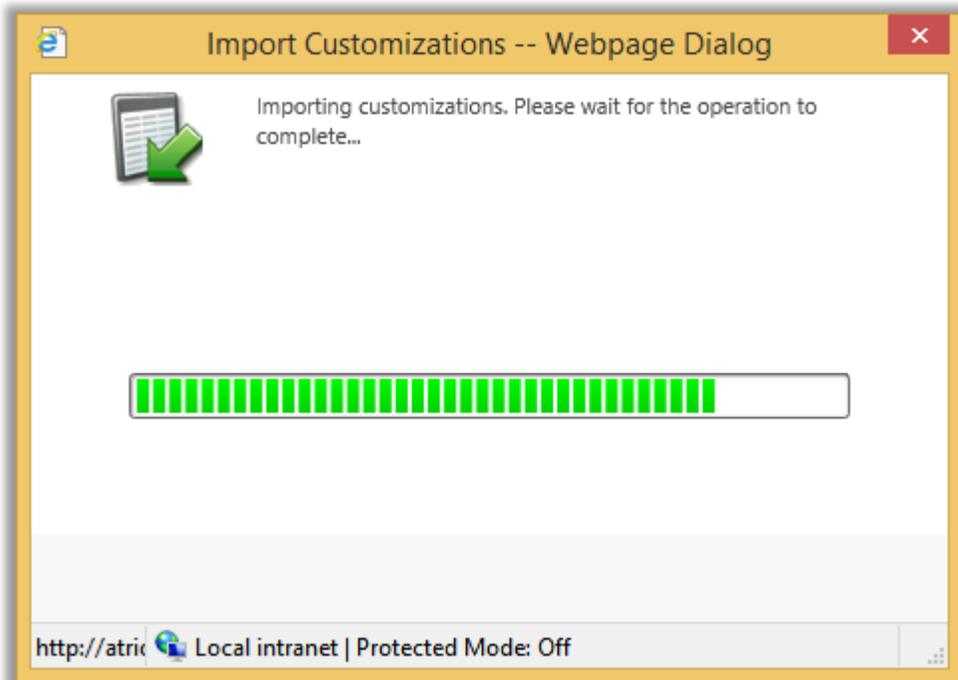
3. Select the downloaded Atrio Calendar managed solution file.

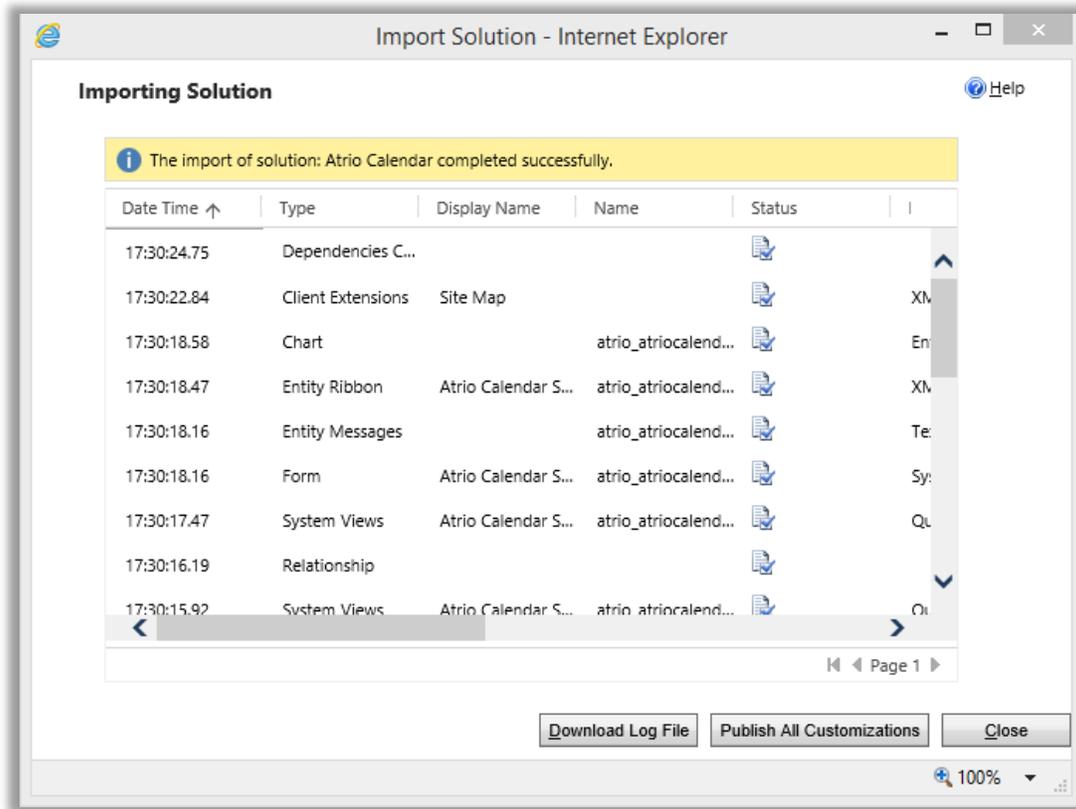


4. Click **Next**



5. Click **Import**





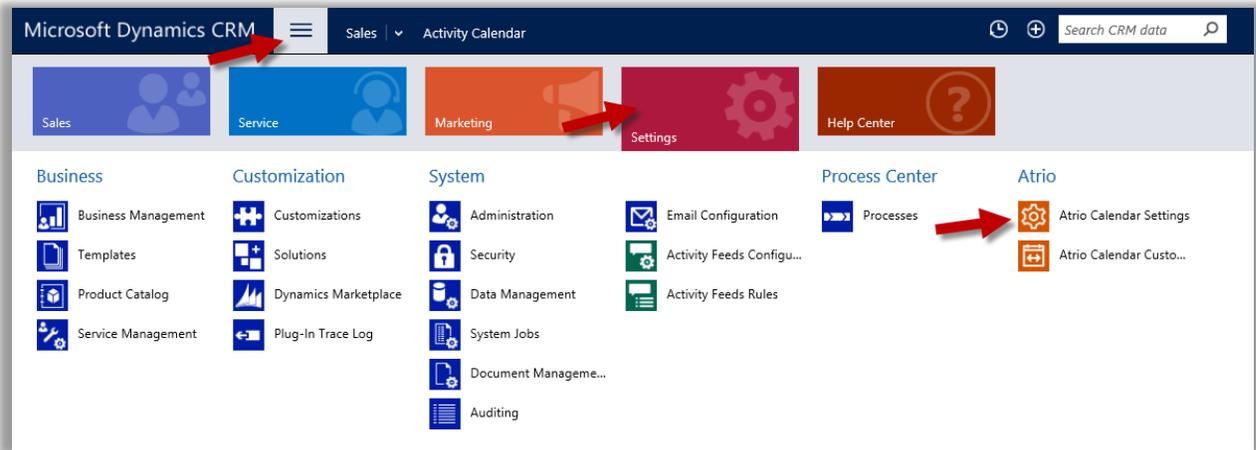
6. Click **Close**
7. Repeat the above steps once again for the Atrio Common managed solution. Atrio Calendar will not function if Atrio Common is not imported into CRM.

Calendar Configuration

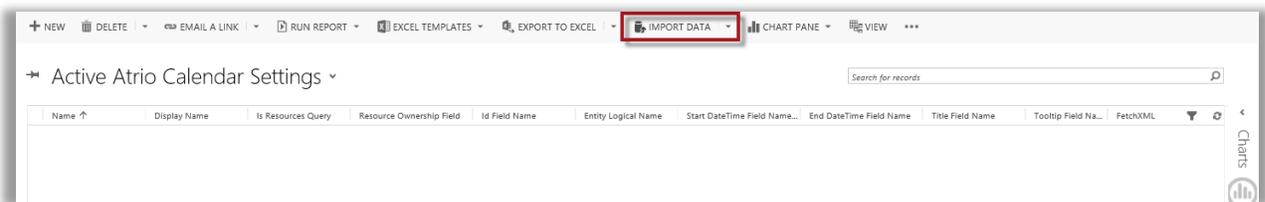
After installing the Atrio Calendar solution on your CRM 2016 system, you need to setup the queries that will be used to retrieve and show the data in the calendar. Atrio Activity Calendar comes with three built-in queries: Users, Appointments, and Tasks. To add these to the calendar, the data needs to be imported from the Excel file.

Import Settings

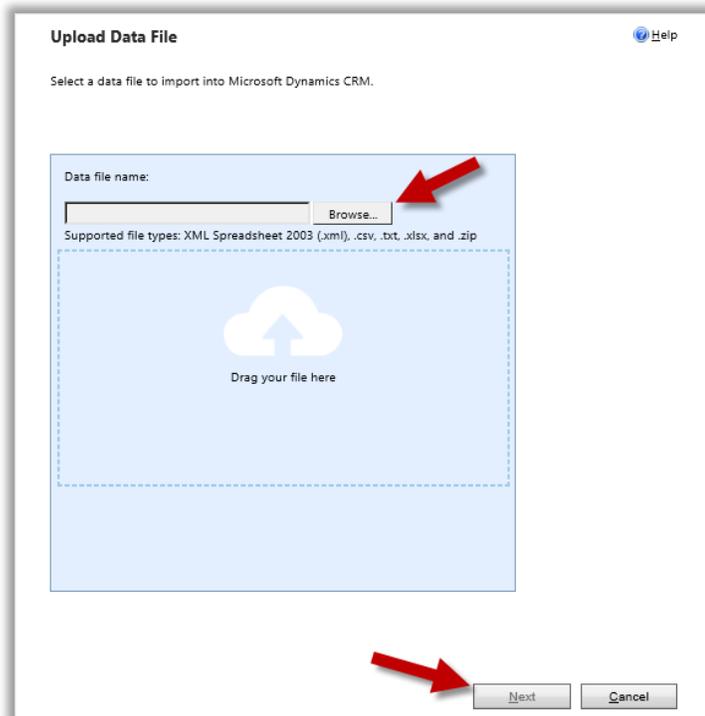
1. On the site map go to **Settings -> Atrio ->Atrio Calendar Settings**. This will open the calendar setting entity.



2. To import the data, click IMPORT DATA and a import wizard will open.



3. Browse for the excel file called "Atrio Calendar Settings." Hit Next.



4. Hit Submit.

Review Settings and Import Data Help

 This action will update existing records, and, if required, create new records.

Review the default settings, make the necessary changes, and submit the data for import.

Allow Duplicates

No
 Yes

Duplicate records will be determined based on the duplicate detection settings in Microsoft Dynamics CRM.

Select Owner for Imported Records



This user will own the imported records if the records do not contain owner information or if the records cannot be assigned to the specified owners.

5. Hit **Finish**.

Data Submitted for Import Help

 Your data has been submitted for import.
To check the status of the import, go to [Settings > Data Management > Imports](#)

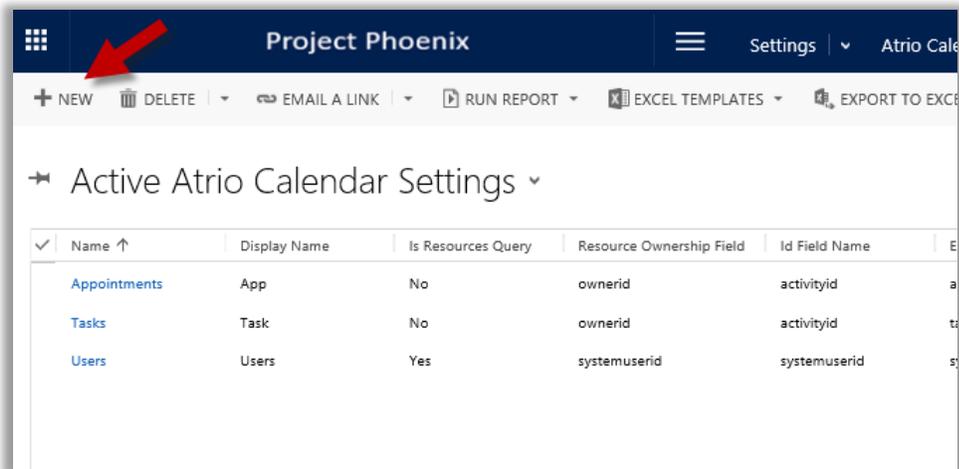


Note: The records will not appear immediately. Wait a couple seconds before refreshing the page. To check on the status of the import go to **Navigation->Settings->Data Managements->Imports**. Re-importing can cause duplicate events.

Creating Custom Records

Custom records are what allow any activity or entity to be added to the calendar.

1. To create a custom record, hit **+ NEW** in Atrio Calendar Settings.



2. Provide the information requested in the form. You need to take in account the following information when creating the records of the entities to show in the calendar:
 - a) The calendar displays the information based on ownership of the records, so you need to provide an entity (or more than one if you need to) whose records are used as owners of the events shown in the calendar.
 - b) The calendar also displays Holidays so you might want to add an entity that is the base of the holidays for the calendar.
 - c) The calendar shows any entity that is not a resource as events in the calendar, you may add as many as you need to populate the events area in the calendar.

Name *	Appointments	Start DateTime Field Name *	--
Display Name *	App	End DateTime Field Name *	--
Is Resources Query *	No	Title Field Name *	--
Resource Ownership *	--	Tooltip Field Name	--
Id Field Name	--		
Entity Logical Name	--		
FetchXML *	--		

Name: This is used just as an identification of the record. Try not to duplicate names to avoid confusions. Typically this would be the name of the entity you are adding to the calendar. If this is an entity that represents the Holiday, type the name "Holidays".

Display Name: The calendar displays all the events in one day in the same box, so the display name will help to distinguish where the event came from. In cases of resources query, this will be the name shown in the button that will show the events separated by resources.

Is Resources Query: Set it to Yes if the records resulting of this query will be treated as resources in the calendar. That means the records of this entity will be shown as owners of the events.

Resource Ownership: Provide the field name or alias, from the FetchXML query that will be used as the owner of either the resource or the event. For resources this identifies the owner, for events this field identifies the owner of the event.

Id Field Name: If you need the calendar to provide the ability of opening the respective CRM record when clicking the event, this will be the field name of the query that will be used as the id of the record to open. You may leave this blank if you don't need this functionality.

Entity Logical Name: Provide the logical name of the entity the Id belongs to, this is also used when the CRM record is opened from the calendar.

Starte Date Time Field Name: For entities that are used as events, provide the field name or alias from the FetchXML query that will represent the date and time the event shows up. If this field is a text field it needs to comply with a standard date notation in order to be parsed as date.

End Date Time Field Name: Provide the field name or alias from the FetchXML query that will represent the date and time the event finishes. If this is empty, the Start Date Time Field name will be used and the events will be considered 'All Day' events.

Title Field Name: This is the field name of the field in either the event or resource that appears in the calendar to identify the event or resource.

Tooltip Field Name: Provide a field name that contains the information that is shown as tooltip in the events or resources in the calendar.

FetchXML: This is a FetchXML query that is executed to retrieve the records used in this entity. This can be any standard FetchXML query.

3. When finishing adding one entity, you may continue adding more configuration records as needed.

Customization the Calendar

Atrio Calendar's customizable features can be found in the solution configuration page.

1. Navigation to **Settings->Solutions**.
2. Select the Atrio Calendar solution.
3. The configuration page will open. Select the calendar skin you would like in the first drop down menu.
4. Mark whether or not you wish to display weekends in you calendar by marking the checkbox.

Atrio Calendar Product Key Page



Summary: Atrio Calendar is a CRM solution that can display any system or custom entity record in a calendar either by month, week, day or separated by ownership. Its allows for easy customization and ease of access to any CRM user's activities without requiring special permissions.

Below is the calendar customization options. Choose the skin layout and whether or not to hide the weekends on the calendar.

Calendar Skin Hide Weekends

- Simply Bold
- Default Blue
- Simply Bold
- Custom Red

You currently have (s) left in your free trial.

Enter the product key you received from Atrio below to start your paid version of Atrio Calendar. This solution will not work past the 30 day trial.

Product Key:

For product assistance or suggestions, contact support@atriosystems.com.

Submit

5. Click **Submit** at the bottom of the page to store your settings.

Product Key

After 30 days of use, Atrio Calendar will no longer work. To enter a purchased product key, follow the steps below.

1. Navigate to the **Solutions** page again and open up the **Atrio Calendar** solution.
2. The **Configuration Page** will appear. Towards the bottom of the page will be a slot for the product key. Type in the product key you received from Atrio and click **Submit**. If you do not have a product key, contact Atrio at support@atriosystems.com to receive one.

Solution: Atrio Calendar - Microsoft Dynamics CRM - Google Chrome

https://atriodemo1.crm.dynamics.com/tools/solution/edit.aspx?id=%7b3A36818A-5785-43BE-83CF-3C4E810C6510%7d#

File Close Actions Help

Solution: Atrio Calendar
Configuration

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution Atrio Calendar

- Information
- Configuration
- Components
 - Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
 - Plug-in Assemblies
 - Sdk Message Processin...
 - Service Endpoints
 - Dashboards
 - Reports
 - Connection Roles
 - Article Templates
 - Contract Templates
 - Email Templates
 - Mail Merge Templates
 - Security Roles
 - Field Security Profiles
 - Routing Rule Sets
 - Record Creation and U...
 - SLAs
 - Mobile Offline Profiler

Atrio Calendar
Product Key Page

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Below is the calendar customization options. Choose the skin layout and whether or not to hide the weekends on the calendar.

Calendar Skin Hide Weekends

You currently have 26 day(s) left in your free trial.

Enter the product key you received from Atrio below to start your paid version of Atrio Calendar. This solution will not work past the 30 day trial.

Product Key:

For product assistance or suggestions, contact support@atriosystems.com.

Status: Existing

Support

We value your feedback, please send product issues and suggestions to support@atriosystems.com. We will take your suggestions to make the product better.

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