OVERVIEW AND INSTALLATION GUIDE

RESOURCEPLUS VERSION 3

Contents

INTRODUCTION

Resource Planner is an extra module that can be installed into Sage, the Planner allows for users to quickly see multiple colleagues diaries at the same time as each user is represented by their own colour.

As with the standard Sage diary system, users are able to hover over any appointment and a tooltip will pop up with information about that appointment.

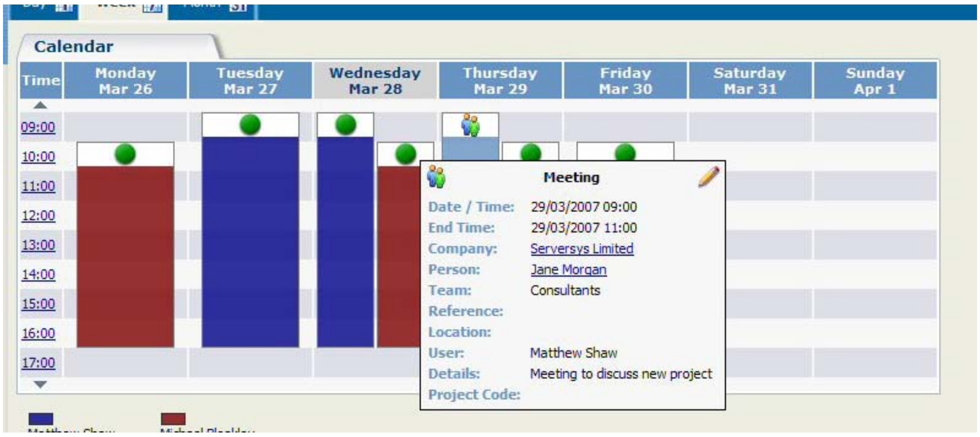
The Resource Planner has been designed around making it as easy for the users to find information as possible, as well as for the Administrator to install and configure the module.

The Planner can be seen either in a monthly, weekly or daily view

FEATURES

- Drag and drop appointments or any scheduled activities quickly and easily.
- View all activity types, phone calls, meetings, demonstrations even custom types defined within your CRM system.
- Create your own icons to indicate custom activity, allowing for quick visual recognition of activities.
- Drag over empty areas within the calendar to schedule new activities and appointments using the standard SAGE CRM MME activity schedule.
- Filter your activities by multiple fields to allow you to quickly and easily find information.
- Assign your own colours to individual users, for easy grouping and sorting.
- Seamless integration with MME. No external applications,
- Monthly, weekly and daily view support
- Easy point and click installation on your web server.
- No local client installation or configuration.

- Multiple user calendar, view up to as many users' calendars as you require.
- Planner abides by territory structures of SAGE CRM MME
- Customisable Tool tip style information on activities. See the key data fields you want just by moving the mouse over an activity.



TECHNICAL INFORMATION

The resource planner for Sage CRM MME uses the latest web based technology to integrate with Sage CRM MME. The planner has been developed as a web based COM object and only requires installation on the CRM server.

Once installed on the server all users with access to Sage CRM MME are able to access the planner with no client installation or additional downloads.

The resource planner is compatible with all current versions of Sage CRM MME up to 6.

The resource planner can be installed with no licence key as a 14 day evaluation. A licence key can be purchased at a later date and the software easily upgraded to a full version.

SERVER INSTALLATION PRE-REQUISITES:

- **Windows 2000, Windows XP, Windows 2000 Server, Windows 2003 Server**
- **Sage CRM Mid-Market Edition 5.8+ (preferably CRM MME 6)**
- **Microsoft .NET Framework 1.1 (version 1.1.4322) Installed**

STEP BY STEP INSTALLATION GUIDE

UPGRADING FROM A PREVIOUS VERSION

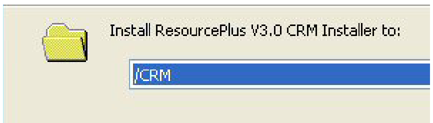
- First step is to open the *Control Panel*
- Then go to *Add or Remove Programs*
- Select *Resource Planner for Sage CRM*
- Then select **Remove**
- Finally, open up *Windows Explorer* and browse to where Sage is installed on the server (default location is C:\Program Files\ Sage \ CRM \ CRM)
- From within the installation folder, browse to WWWRoot \ Custom Pages

- **And in here there may be a folder called *Calendar*. If it does appear either rename, move or delete the folder as this will contain the old files for the previous version and can break the new install**
- Finally follow the steps for *Fresh Installation*

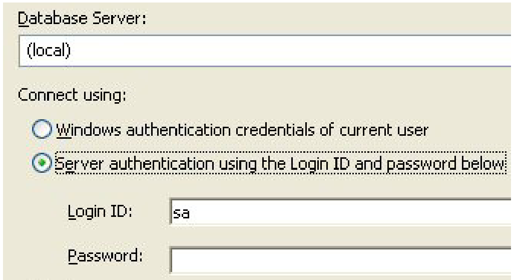
FRESH INSTALLATION

- First of all, Stop Internet Information services.
- Run the installation wizard and the following screen should appear

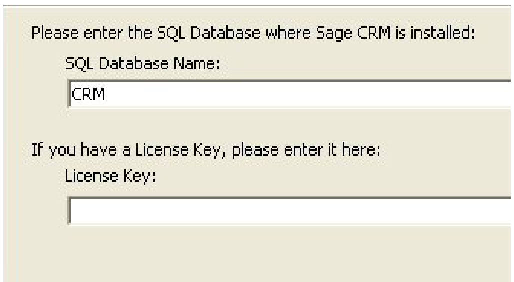
- Click on **Next**
- Read and agree to the User Agreement
- Click on **Next**
- The installer will then detect any installs of Sage MME CRM on the machine, the drop down will list all the different installs. Select the one that the Resource Planner is going to be installed for (default Sage install is *CRM*)



- Then click **Next**
- Next the installer will prompt for which SQL server your CRM uses and the necessary log in details that can access the server



- Once all the correct information has been selected, click on **Next**
- On the next screen, you will need to enter in the name of the database on the SQL server, normally this is defaulted to *CRM*



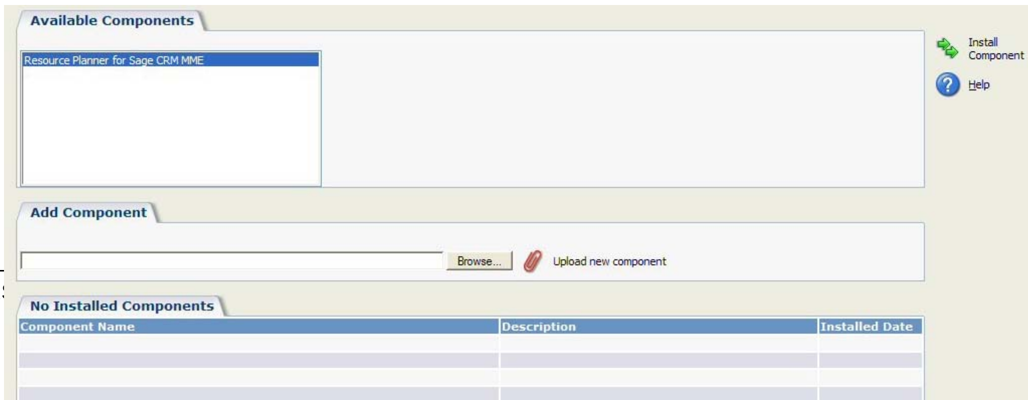
- If you have a licence, then enter that in here. Otherwise you can leave it blank and you will be able to fully use the Resource Planner for the next 14 days. If you then decide to purchase a licence, look towards the end of the document on instructions on how to update your licence key.
- Finally restart the Internet Information services.

CONFIGURING RESOURCE PLANNER

- Login in to CRM as an administrator
- To go the *Administration* section in Sage
- From the main menu select **Customisation**
- Then at the top right select **Component Manager**

The resource planner should be displayed as an available component.

- Select the *Resource Planner* and click on **Install Component**.



- The next screen will get you to confirm the installation
- After which Sage will then install the Resource Planner module.
- Once it has finished click **Continue** to take you back to the previous screen. You should now see the resource planner in the list of installed components. It is now installed and ready to use.

CUSTOMISING THE PLANNER FROM ADMINISTRATION

Customising Resource Planner is easy and very straight forward, all the settings are dynamic and will take affect immediately. An IIS Reset is not required

All of the customisations are can be found in the administration area of CRM. Once installed, Resource Planner will place a new menu option within the administration area

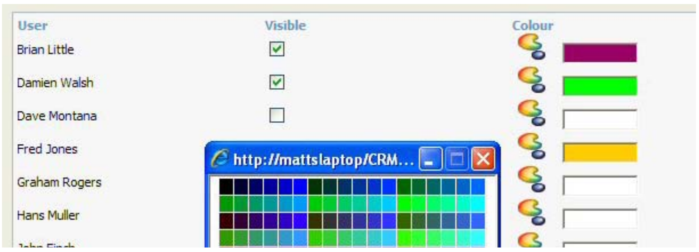
The three tabs along the top of the planner [Day/Week/Month] can also be customised using your "Calendar View" setting, which can be located under your "User Preferences". This allows user to determine which Planner view opens as default [Day/Week/Month]

There are five tabs used to change the look and feel of the planner.

USERS TAB

All users of Sage are listed within this tab, in order to make them available to appear within the Resource Planner, put a tick in the *Visible* box

To make each user appear differently, click on the *Colour* symbol and a pallet appears, click on a colour for the user



FILTER TAB

The row height of each filter selection box can be modified in this tab. Setting the height value to 0 will remove the filter field completely.

As you can see from the settings to the right, *Action* is set to zero, so there is no action filter box in the panel on the right.

But there is a *Status*, *User* and *Team* list.

- Other options that users can use in here is the ability to scroll through the months / weeks / days.
- If a team is selected in the team filter box, then all the users from that team will be come selected in the user box.

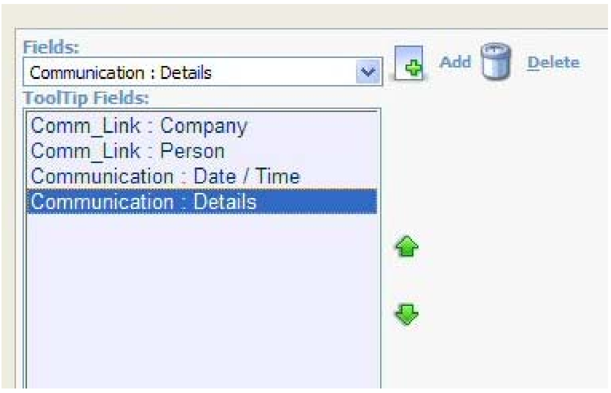
- If you click the *Clear Team* button, then the team list will empty itself.
- Not only can you control what day period to look at, but at the bottom you can control what is the time slice that you're interested in.
- *Apply Timezone* allows you to handle appointments for people based all over the world. Without the tick in the box, it would only show the appointments between the times specified in your time zone. But you won't get any appointments for someone who is in a different time zone. (e.g. An appointment for 9am to 10am for someone in the 'home' time zone like London, will appear in the planner, but for someone in Ohio who also has a 2pm to 4pm appointment in their diary will not have their appointment appear as they are 5 hours behind. By putting a tick in the tick box, it would make it appear that the Ohio's diary fits within the planner.

TOOLTIP TAB

By default the planner will display the following fields from the communication table when you move the mouse over an activity.

- Company – Name of the company the appointment is with
- Person – Name of the person at the company the appointment is with
- Date / Time – The start date and time of the appointment
- Details – This is the main section of the appointment screen where the notes of the appointment are normally entered.

The order of the fields here will control the order of the fields in the tooltip window when it appears.



Additional fields can be added into the tooltip list by selecting them from the selection list and clicking the add button. The order of fields displayed can also be adjusted by using the up and down arrows located next to the list of fields.

MISC TAB

DAYS COUNT

The planners week view can be altered to display 5 working days Mon - Fri or a seven day week. Simply changing the DaysCount selection to 5 or 7 will cause the planner to change it's view.

INCLUDE COMM IMAGE

By changing this option to **No** it is possible to disable the picture icons when the planner displays activities.

ORACLE

If you are running the planner against an oracle database select **Yes** from the Oracle field to ensure database compatibility.

CUSTOMISING THE ACTIVITY ICONS

Any of the pictures can be changed to modifying the corresponding .GIF picture file in your <CRM ROOT>\Img\Choices\Comm_Action directory.

If you have a custom activity type simply create a new picture file with the same file name as your activity type.

DAYTOOLTIP

Allowing you to provide more information when looking at the day view. Just like the *Tooltip* tab, you are able to add and remove fields that will show in the tooltip pop up when users hover over the appointments whilst in the day view

EXPLANATION OF FUNCTIONS

Date currently selected. Program uses this to build the information in the planner (Default to current date)

Previous / Next date

See planner todays date

Filter appointments/tasks by communication status

Current users you have access to view.

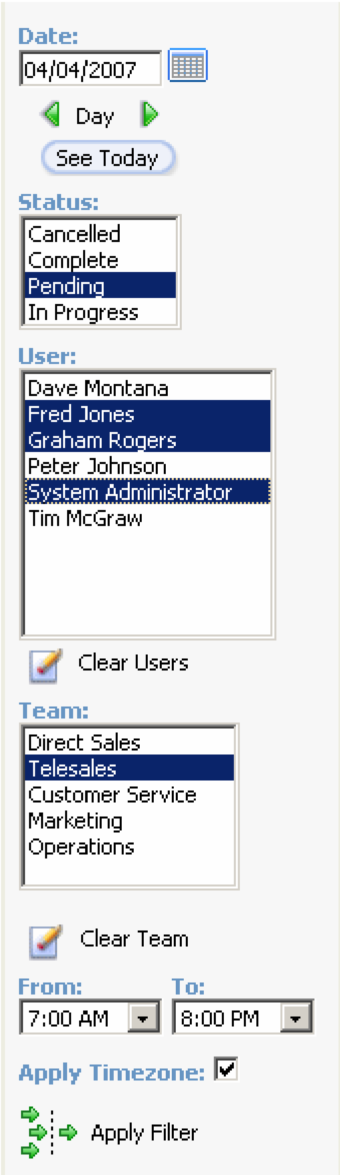
These lists are based on those teams the user has selected in their "display teams" field in the user settings. "My CRM List" and "My Team List" needs to be set to All Users and All Teams respectively otherwise user will only have access to their own communications only, and will not see the full list of available users/teams (new advanced security)

Current teams you have access to view (this also drives the "user" list. Allowing you to automatically highlight those in that team.

Based upon user preferences of "Diary Start Time" and "Diary End Time"

Turns on/off timezone function

Apply options to planner display



UPGRADING TO A FULL LICENCE

- Go to *Control Panel* and select **Add or Remove Programs**
- Select *ResourcePlus v3.0 for Sage CRM*
- Select **Change**
- Click **Next** and then select **Modify**
- Click **Next**
- Enter the licence key in the box provided
- Click **Next**
- Click Install

REPAIRING RESOURCEPLUS

- Go to *Control Panel* and select **Add or Remove Programs**

- Select *ResourcePlus v3.0 for Sage CRM*
- Select **Change**
- Click **Next** and then select **Repair**
- Click **Next**
- Follow the on-screen instructions to repair your current installation of Resource Plus

N.B the "Repair" operation will require you to enter your full valid licence key to complete repair