AvePoint®

AvePoint Record Rollback 3.1.2 for Microsoft Dynamics® CRM

Installation and Configuration Guide

Revision D
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Overview

AvePoint Record Rollback for Microsoft Dynamics CRM implements audit record management mainly through three functions: **Record Rollback**, **Recycle Bin**, and **Version History**. AvePoint Record Rollback enables users to manage the audit records of entities, search the audit records of a specific entity, view all of the historical audit records of an entity, and roll back a specific record to restore the entity's previous values.

AvePoint Record Rollback for Microsoft Dynamics CRM supports Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM 2011.

Before using AvePoint Record Rollback for Microsoft Dynamics CRM, you need perform the following steps:

1. Obtaining the Record Rollback Solution Package
2. Importing the Record Rollback Solution
3. Setting Privileges for Security Roles
4. Applying a License

Obtaining the Record Rollback Solution Package

Obtain the **AvePoint_Record_Rollback_for_Dynamics_CRM_Serial_Number.zip** file from an AvePoint representative.

Supported and Unsupported Web Browsers

Before you begin to import and configure the Record Rollback solution, refer to the table below for detailed information of supported and unsupported Web browsers for the Record Rollback solution.

Web Browser	**Support Status**
Internet Explorer 8	Supported
Internet Explorer 9	Supported
Internet Explorer 10	Supported
Google Chrome	Supported
Firefox	Supported
Safari	Unsupported

Importing the Record Rollback Solution

The Record Rollback solution must be imported into Dynamics CRM before any of its functionality can be leveraged. Follow the steps below to import the Record Rollback solution into Microsoft Dynamics CRM 2013 or Microsoft Dynamics CRM 2011.

1. Log into Microsoft Dynamics CRM 2013 or Microsoft Dynamics CRM 2011 and navigate to **Settings** > **Customization** > **Solutions**.
2. Click **Import** to import the Record Rollback solution. The **Select Solution Package** page appears.

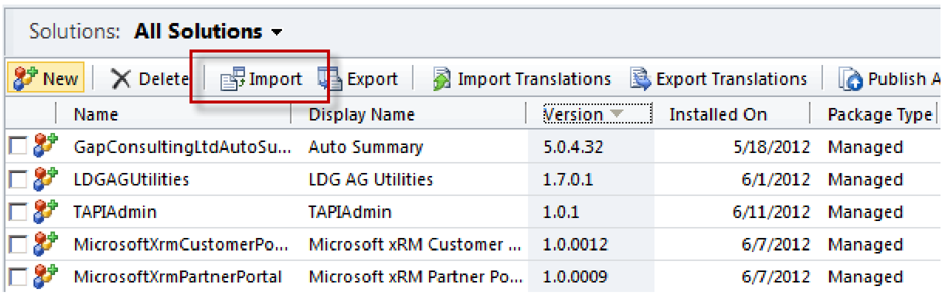

Figure 1: Importing the Record Rollback solution (Dynamics CRM 2011 environment shown).

3. On the **Select Solution Package** page, click **Browse**. Select the **AvePoint_Record_Rollback_for_Dynamics_CRM_Serial_Number.zip** file that contains the solution, and then click **Next**.
4. View the solution's information in the **Solution Information** page to verify the solution **Name**, **Publisher**, and **Package Type**.
   a. If desired, click **View solution package details** for more details.
      - **Solution Details** – Displays the version, package type, and so on.
      - **Publisher Details** – Displays the publisher information.
      - **Solution Components** – Displays the components that will be imported.
   b. Click **Close** to return to the **Solution Information** page.
   c. Click **Next** to continue.
5. To complete the import process, select the **Activate any processes and enable any SDK message processing steps included in the solution** checkbox shown below. Click **Next** and wait for the operation to complete.

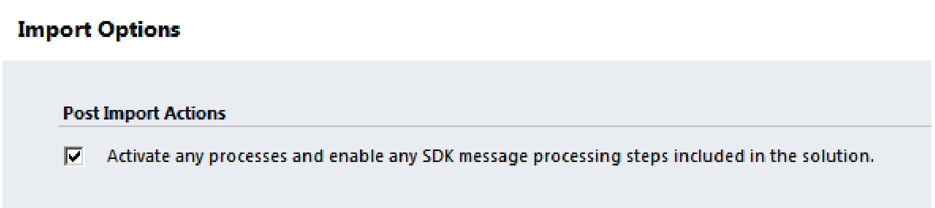

Figure 2: Import Options (Dynamics CRM 2011 environment shown).

***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.

6. After the solution imports successfully, click **Close** to close the **Importing Solution** page.
7. Verify that Record Rollback is displayed in the **All Solutions** list.

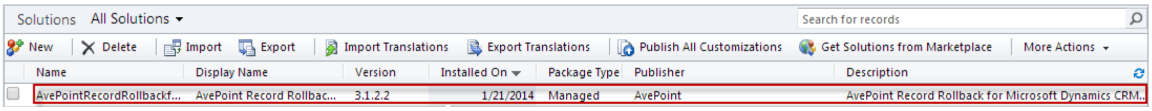

Figure 3: Successfully imported Record Rollback (Dynamics CRM 2011 environment shown).

Setting Privileges for Security Roles

In order for users to leverage the Record Rollback functions, their security role privileges must first be configured. Only users whose security roles have the required permissions can use the Record Rollback solution. Follow the steps below to set the required privileges for the security roles that will be using the Record Rollback solution.

1. Log into Dynamics CRM as a user with administrative access.
2. Navigate to **Settings** > **Administration** > **Security Roles**.
3. Select the security role that will use Record Rollback.

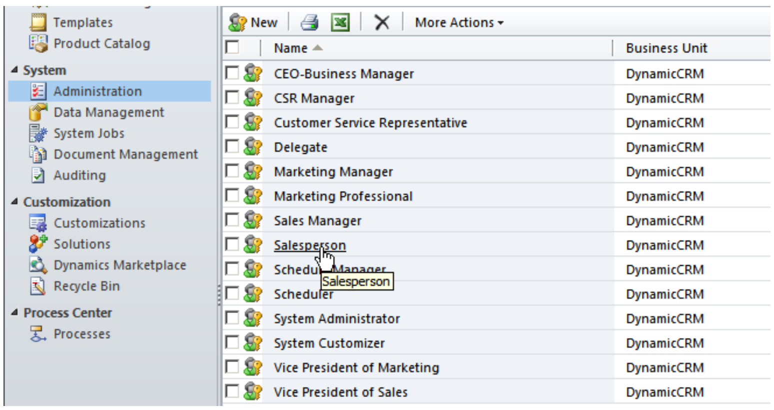

Figure 4: Selecting security roles (Dynamics CRM 2011 environment shown).

4. Set the minimum privileges as follows for the current security role:

Tab	Entity	Privilege	Key	Comment
Core Records	User Entity UI Settings	Create	User	
		Read	User	
		Write	User	
	/	View Audit Summary	Organization	This privilege is in the **Miscellaneous Privileges** list.
Custom Entities	Configure Record Rollback	Create	Organization	This enables end users to use the **Rollback** function.
		Read	Organization	
		Write	Organization	
	Roll back Records	Create	User	This enables users to apply a license for this solution.
		Read	User	
		Write	User	
Customization	Entity	Read	Organization	
	Field	Read	Organization	
	Customizations	Read	Organization	
	System Chart	Read	Organization	
	System Form	Read	Organization	
	View	Read	Organization	

Tab	Entity	Privilege	Key	Comment
	Web Resource	Read	Organization	
	Relationship	Read	Organization	
Business Management	User Settings	Read	User	

5. Click **Save and Close**.
6. Repeat steps 3 through 6 for all desired security roles.

***Note**: In the current version of Record Rollback, the default roles **AvePoint Record Rollback User Account** and **AvePoint Record Rollback Admin Account** are created to avoid issues with setting user privileges. The user who has the default security role of **AvePoint Record Rollback User Account** can access Recycle Bin, and the user who has the default security role of **AvePoint Record Rollback Admin Account** can access Record Rollback and Recycle Bin.

Applying a License

Record Rollback provides a built-in license which enables you to freely use Record Rollback for 30 days. After the 30-day trial, you must apply a new license to continue using Record Rollback.

Follow the steps below to apply the license.

1. Log in to Dynamics CRM and navigate to **Settings** > **Customization** > **Record Rollback**.
2. Click **License Manager** to access the **Record Rollback Registration** interface.
3. Open the license file using Notepad and copy all contents within it into the blank text box.
4. Click **Apply**. The **End-User License Agreement** page appears.
5. Read the license agreement carefully and select **I accept the terms in the license agreement**. Click **Next** to apply the license.
6. After the license has been applied successfully, the license information will be displayed in the **License Details** field.
    - **Product** – Displays the product name, which is AvePoint Record Rollback.
    - **License Type** – There are two license types:
        - **Demo**– The demo license is for your trial and limits the validity period.
        - **Enterprise**– The formal license to register the product. The account number and the validity period in this license are according to your purchase.
    - **Number of Licenses** – The maximum number of the users that are able to use the solution meanwhile.
    - **Organization GUID** – The GUID of the organization that has installed the Record Rollback solution, which is used to limit the organizations that can register the solution.
    - **Validity Period** – The validity period of the license you applied.

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