

Created by MyCRM Ltd

ePicture 2011

User and function guide

Alistair Dickinson 5/8/2012



Function Description

The main purpose of this document is to help end users gain insight and knowledge when using the latest release of ePicture for Microsoft Dynamics CRM 2011, from MyCRM.

The new ePicture function allows end users to create Image galleries against individual record types in CRM and select a resource to display a primary picture with doing any additional configuration or development of the CRM system.



Create Image Galleries

After installing the ePicture Solution from the MyCRM Download Centre navigate to settings on the left to the Image Gallery Admin, and the following screen will be displayed.

File Home			Microsoft Dynamics CRM			First name Last name @ ePicture
New New Tools	-					
Settings 🛛 🚮 🙀 -	Image Galleries					
Business	🛛 New 🛛 🗙					
Business Management Business Templates	Entity	Navigation Mode	Description	Gallery Entity Name	State	Created By
Product Catalog	🗌 🚂 Contact	Form Tab	Image gallery for the Contact entity	myce_contact_images	Ok	First name Last nar
System	🗆 🔛 Account	Form Tab	Image gallery for the Account entity	myce_account_images	Ok	G W
2 Administration	🗌 🎯 Product	Form Tab	Image gallery for the Product entity	myce_product_images	Ok	G W
🚰 Data Management	🗆 🍙 Car	Form Tab	Image gallery for the Car entity	myce_new_car_images	Ok	First name Last na
System Jobs	🗌 💩 House	Form Tab	Image gallery for the House entity	myce_new_house_images	Ok	First name Last na
🛃 Processes						
Extensions MyCRM Licence Manager						
MyCRM Licence Manager						
MyCRM Licence Manager MyCRM Licence Manager Workplace						
MyCRM Ucence Manager MyCRM Ucence Manager Morkplace Sales						
MyCRM Licence Manager MyCRM Licence Manager Safes Marketing						
Extensions Extensions MyCRM Licence Manager MyCRM Licence Manager MyCRM Licence Manager Sates Sates Sa						

From here select the "New" button from the tool bar

🗿 New Image Gallery	/ Wizard Webpage Dialog
Attp://crm2011-de	ev-3. mycrm.local /epicture/%7B634737933450000000%7D/WebResources/myce_/NewImag
Create New Image Enter the details to cre	e Gallery ate a new Image Gallery.
Select Entity to create	e the Image Gallery for
Entity	
	OK Cancel

From the Drop Down select the entity type that will have the associated Image Gallery.

From the example below the Case entity in CRM has been selected, You can also select how users will navigate to the image gallery from the entity form.



None = the Gallery will not be displayed on the entity

Form Tab = Means the images Gallery is embedded on the form

Navigation Link = Image Library is available from the left Navigation

New Image Gallery Wizard Webpage Dialog							
🏈 mtat//crm2%11-dev-3. mycrm.local /epicture/%7863473793345000000%7D/WebResources/myce_/ikewimag							
Create New Image Gallery Enter the details to create a new Image Gallery.							
Select Entity to create th	ne Image Gallery for						
Entity	🗐 Case	•					
Select how the Image G	allery will be displayed on the entity form						
Display	None	•					
Select which entity form	is to add the Image Gallery to						
Name	Description	State 🛛 😂					
Information	A form for this entity.	Managed					
		OK Cancel					



Once the above settings are set, select the OK button at the bottom of the screen. The New Gallery will be created and published in CRM.

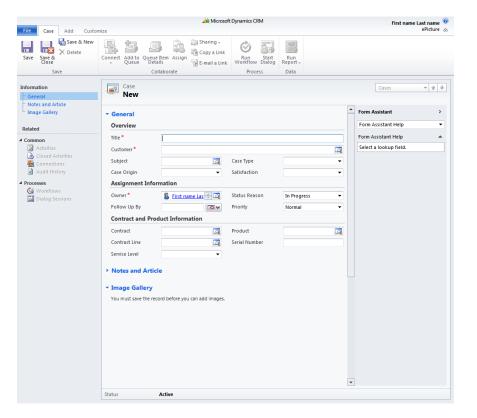
File Home			Microsoft Dynamics CRM			First name Last name @ ePicture
New New Data Find	-					
Settings 🛛 😭 💘 -	Image Galleries					
4 Business	🔢 New 🗙					
🐫 Business Management	Entity	Navigation Mode	Description	Gallery Entity Name	State	Created By 💈
Templates Product Catalog	🗌 🔙 Contact	Form Tab	Image gallery for the Contact entity	myce_contact_images	Ok	First name Last nam
System	🗆 🔛 Account	Form Tab	Image gallery for the Account entity	myce_account_images	Ok	G W
Administration	🗌 🧇 Product	Form Tab	Image gallery for the Product entity	myce_product_images	Ok	G W
🚰 Data Management	🗆 🍙 Car	Form Tab	Image gallery for the Car entity	myce_new_car_images	Ok	First name Last nam
📝 System Jobs	🗌 🍙 House	Form Tab	Image gallery for the House entity	myce_new_house_images	Ok	First name Last nam
Document Management Auditing	🗌 🗰 Case	None	Image gallery for the Case entity	myce_incident_images	Ok	First name Last nam
Dynamics Marketplace Process Center The process set of the processet set of the process set of the process set of the process set of		New Galle	,			
MyCRM Licence Manager						
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Using WebResource to Display Primary Picture on a Form

In this section we look at configuring a form to use the additional web resource to display a primary picture on a record, in this example the case record is being used.



The above is a default view of the standard case record; the first step is to change the layout of the case record so that the web resource can be added to the form, using the customisation facility edit the case form.

		N	Aicrosoft Dynamics CRN		First name Last name
File Home Insert					ePicture
	Change Remove Properties	Body Header	Form Properties	& Assign Security Roles ಈ Show Dependencies ∭ Managed Properties	
Save	Edit	Select		Form	
 Information General Notes and Article Image Gallery 	Solution: Defau Form: Case	It Solution			Filed Explorer Filter All Fields
Common Activities Closed Activities					Actual Service Units Billed Service Units Case Number
Gonnections	General				Case Stage
4 Sales	Title*	Title			Created By (Delegate)
	Customer	Customer			Created On
Service	🔒 Subject		Case Type	Case Type	Currency Decrementing
Marketing	Case Origin		Satisfaction	Satisfaction	Description
Processes					Exchange Rate
🥨 Workflows	Assignment Informat	on	,		- Modified By (Delegate)
Dialog Sessions	A Owner*		Status Reason	Status Reason	Modified On
	Follow Up By	Follow Up By	Priority	Priority	Responsible Contact Severity
	Contract and Product	Information			Status
	Contract	Contract	Product	Product	
	Contract Line	Contract Line	Serial Number	Serial Number	
	Service Level	Service Level			
					Vew Field

Using the edit tools layout the form as below, this is just an example so that a space is created for the new web resource on the form

File Home Insert		🚣 N	licrosoft Dynamics CRM		First name Last name ⑦ ePicture 🔺
Save and Close	ange Berties Edit	Body Footer Body Navigation Select	Form Preview Properties +	Assign Security Roles Show Dependencies Managed Properties Form	
Information General Notes and Article Image Gallery	Solution: Defau Form: Case				Field Explorer > Filter All Fields I/ Only show unused fields
Common Activities	▼ General Overview				Actual Service Units Billed Service Units
Closed Activities	Title *				Case Number
Audit History Sales	🔒 Subject				Created By Created By Created By (Delegate)
▲ Service	Satisfaction Case Origin				Created On Currency Decrementing
 Marketing 	Case Type Status Reason				Description Exchange Rate
Processes Workflows	Priority	Priority			Modified By
Dialog Sessions	Assignment Informat	ion			Modified On Responsible Contact
	🔒 Owner* Follow Up By				Severity Status
	Contract and Product	Information			
	Contract		Product		
	Contract Line Service Level		Serial Number		New Field

Then select the Insert tab at the top to add new web resource from the tool bar.



Add Web Resource Webpage Dialog						
Shttp://crm2011-dev-3.mycrm.local/epicture/Tools/FormEditor/Dialogs/webresourc						
Add Web Resource Add an existing web resource to the Form.						
General Formatting Dependencies						
Web resource						
Web resource *	Q					
Field Name and Properties						
Name* WebResource_						
Label *						
Display label on the Form						
Help	OK Cancel					
http://crm20 😜 Internet Protected Mode: On						

On the web resource form select the resource to use, this is as follows:

ook fo View	Web Resource Form Enabled Web Resources	▼	
Search	Search for records	٩	
	Name	Display Name 🔺	Description
0	myce_/images/configentityicon	Image Galleries	Icon for Image Galleries Configuration Recc
1	myce_/ClientBin/LicencingManager	/ClientBin/Licen	
9	myce_/images/licence.png	/images/licence	
	myce_/LicencingManager.html	/LicencingMana	
9	myce_/ImageGalleriesConfigWrapp	Configuration	Wrapper for the Configuration Silverlight C
	myce_/images/entityicon	Image Entity Icon	Icon for entitites created for Image Galleries
9	myce_/ClientBin/ImageGalleries.Co	Image Galleries	Silverlight control to configure Image Galler
0	myce_/ClientBin/ImageGalleries.Ima	Image Gallery C	Silverlight control to display Image Galleries
1	myce /ClientBin/ImageGalleries.Pri	Image Gallery Pr	Silverlight control to display the Primary Ima
9	myce_/ImageGalleryWrapper.htm	Image Gallery	Wrapper for the Image Gallery Silverlight Co
9	myce_/ClientBin/ImageGalleries.Upl	Image Uploader	Silverlight control to add new images to an
1	myce_/ImageUploaderWrapper.htm	Image Uploader	Wrapper for the Image Gallery Uploader Sih
1 - 17	of 17 (1 selected)		M 🖣 Page 1 🕨



From this screen you can select ok and populate the relevant setting on the Web Resource screen.

Add Web Resource Webpage Dialog
Stat://crm2011-dev-3.mycrm.local/epicture/Tools/FormEditor/Dialogs/webresour:
Add Web Resource Add an existing web resource to the Form.
General Formatting Dependencies Web resource Web resource * Image: ClientBin/ImageGalleries.PrimaryImag + Image: ClientBin/ImageGalleries.PrimaryImag +
Field Name and Properties Name * WebResource PrimaryPicture Label * PrimaryPicture Display label on the Form
Visibility Specify the default visibility of this control. ⊽ Visible by default
Web Resource Properties Custom Parameter(data)
Pass record object-type code and unique identifier as parameters.
Help OK Cancel
http://crm2(🍚 Internet Protected Mode: On

The select ok to return to the form

From the image below you can see the web resource has been added to the form, this by default is double column

File Home Insert		4 Microsoft Dynamics CRM	First name Last name Ø ePicture
One Two Three Four Column Columns Columns Column		Sub-Grid Web Navigation	
Section	Tab	Control	
Information	Solution: Def	ault Solution	Field Explorer >
General	Form: Case		
 Notes and Article 	Header	1	Filter All Fields •
- Image Gallery	Ticauci		Only show unused fields
Common			Actual Service Units
Activities			Billed Service Units
🚡 Closed Activities	 General 		Case Number
🛃 Connections			Case Stage
🛃 Audit History	Overview		Created By
Sales	Title *	Title	Created By (Delegate)
1	🔒 Customer	Customer	Created On
Service	🔒 Subject	Subject	Currency
	[];i		Decrementing
Marketing	Satisfaction	Satisfaction	Description
	Case Origin	Case Origin	Exchange Rate
Processes	Case Type	Case Type	Modified By
Workflows			Modified By (Delegate)
🔜 Dialog Sessions	Status Reason	Status Reason	Modified On
	Priority	Priority	Responsible Contact
			Severity
	myce_/clientBin/Ir	nageGalleries.PrimaryImageViewer.xap	Status
			New Field



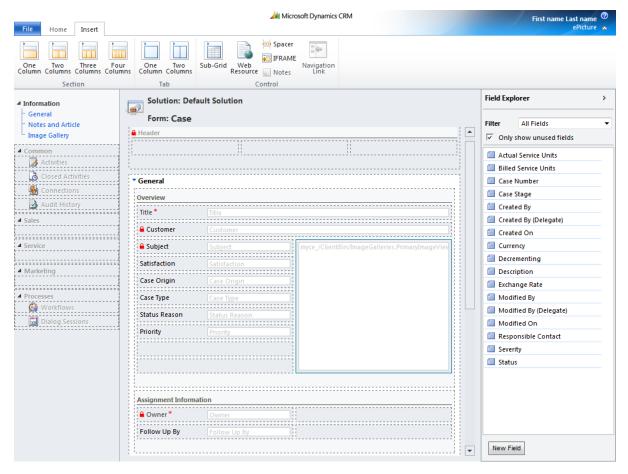
Select the web resource on the form by double clicking and change the format setting to be single column for best effect

Web Resource Prop	erties Webpage Dial	log	×
🎒 http://crm2011-dev	-3.mycrm.local/epictu	ure/Tools/FormEditor/Dialogs	/webresour
Web Resource Prop Modify this Web resou			
General Formattin	g Dependencies		
Layout Select the number o One column	f columns the control o		
C Two columns			
C Three columns			
C Four columns			
Row Layout			
	f rows the control occu	ipies.	
Number of Rows	8 pand to use available s		
Silverlight Control F	Properties		
Size	Use available	e area (Stretch to fit)	•
	Height	pixels	
Help	t Protected Mode: Or	ОК	Cancel

Select ok to save the format settings

You can move the web resource into place so that the edited screen looks like the example below





Save and publish the form and this completes the customisation of the web resource.



Adding Images to a Record

Again in this example we use the Case record that we configured above to add an image to a case that has been raised in CRM.

The example below is of a new case that has been created and saved, now an image is going to be added

			Microso	ft Dynamics CRM			First name Last name 🤒
File Case Add Custor	nize						ePicture 🛆
Save & New Save & Save & New Save & Save & Delete Save	Resolve Cancel Case Case Conr Actions	Add to Queue Item Assign Collaborate	k Work	in Start flow Dialog Process Data			
Information - General Notes and Article	Case CAS-010	00-S9J4C4					Cases 💌 🛊 🖗
Image Gallery	 General Overview 						Form Assistant > Form Assistant Help
4 Common	Title *	Broken Camera					Form Assistant Help
Activities	Customer*	S Alisatir Dickinson					Select a lookup field.
 Closed Activities Connections Audit History 	Subject Satisfaction	Default Subject Neutral	1			3	
Processes Workflows	Case Origin	Web	•				
Dialog Sessions	Case Type Status Reason	Problem In Progress	•	There are no images in the gallery to display			
	Priority	Normal	-				
	Assignment Info	ormation					
	Follow Up By		••				
	Contract and Pro	oduct Information					
	Contract			Product			
	Contract Line		<u></u>	Serial Number			
	Service Level		•				
	Notes and Arti	cle					
	▼ Image Gallery						
	Add Images			Display	25 Images 🔻 View Large Images	- 2	-
	Status	Active					•
	Jacus	ACUYC					

From the Top left navigate to the Image Gallery and select the "Add Image" on the tool bar

	Microsoft Dynamics CRM	First name Last name 🤒
File Case Add Custor	nize	ePicture 🚕
Save & New Save & Save & New Save & Close	Image: State Concett Image: State Concett <td></td>	
5010		
Information General Notes and Article	CAS-01000-S9J4C4	Cases v tr a
L Image Gallery	* Image Gallery	Form Assistant >
Related	📓 Add Images 📊 🔟 🗙 🗊 Display 25 Images 🔹 View Large Images 🔹 🗸	Form Assistant Help 🔹
4 Common		Form Assistant Help
Activities Closed Activities Connections Audit History		Select a lookup field.
Processes Gé Workflows Dialog Sessions		
	There are no images in this view	
	1-0 of 0 K 4 Page 1 >	
		•
	Status Active	



Select the add images and the following Screen is displayed

🔊 Image Gallery Uploader Webpage Dialog		×
Attp://crm2011-dev-3.mycrm.local/epicture/WebResources/myce_/ImageUploaderWrapper.htm?data=id%	3d30b5f2b4-c8a8-e1	11-b766-00155d7b
Upload Images Select images to add to the Image Gallery.		
	Choose Images	🔊 Web Cam
Note: Images will be converted to PNG format and resized to a maximum width or height of 1280 pixels	Upload	Cancel

In this example we select images from the Hard Drive but if a webcam is connected this can be used to capture images

Image Gallery Uploader Webpage Dialog					
Mttp://crm2011-dev-3.mycrm.local/epicture/WebResources/myce_/ImageUploaderWrapper.htm?data=id%3d30b5f2b4-c8a8-e111-b766-00155d7b					
Upload Images Select images to add to the	e Image Gallery.				
		Choose Images	🗟 Web Cam		
	Name	cam.png	×		
	Description				
° 79	🖌 Set as Prima	y Image			
Note: Images will be converted to	o PNG format and i	esized to a maximum width or height of 1280 pixels	Cancel		

Once the image is selected the primary setting can be set and the image uploaded to CRM, please note multiple image uploads is supported in ePicture



Once the picture is uploaded the Case record will refresh and the picture will be displayed.

