Sage CRM 2017 R1

Citrix XenApp and RDS Support Guide

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About this guide

This guide is intended for system administrators, implementers, Sage CRM operating companies (OpCos), and partners who want to make Sage CRM available to users via Citrix XenApp or Remote Desktop Services.

Please note that while this document refers to Sage CRM, regional products may use different brand names.

Supported versions of Citrix XenApp and RDS

For detailed information about versions of Citrix XenApp and Remote Desktop Services supported by Sage CRM, see the *Software Support Matrix* published on the Sage CRM Help Center.

Working with Citrix XenApp

Citrix XenApp is a solution for virtual application delivery that provides users with access to Windows applications and data over any network and on any device. You can use XenApp to make Sage CRM plugins installed on a single computer available to users in the entire organization.

For more information about Citrix XenApp, go to https://www.citrix.com/products/xenapp/overview.html.

Before you configure Citrix XenApp for working with Sage CRM, consider the following:

- Your environment must have only one Sage CRM server deployed.
  Multi-server Sage CRM environments are not supported.

- Roaming user profiles are not supported.

- Sage CRM and its plugins have not been fully tested in multi-server Citrix XenApp environments.

For instructions on how to install Sage CRM plugins on a Citrix XenApp server, see Installing Sage CRM plugins.

Working with RDS

Remote Desktop Services (RDS), formerly known as Terminal Services, is a server role in Windows Server that enables users to remotely access applications hosted on a single computer over the corporate network or from the Internet. You can use RDS to make Sage CRM plugins installed on a single computer accessible to users in the entire organization.

For more information about RDS, see "Remote Desktop Services Overview" on technet.microsoft.com at https://technet.microsoft.com/library/hh831447.aspx.

To make sure that your environment is supported, you should perform a full user acceptance testing of the application.

For instructions on how to install Sage CRM plugins on a Windows Server that has the Remote Desktop Services role deployed, see Installing Sage CRM plugins.

Installing Sage CRM plugins

This section provides instructions on how to install Sage CRM plugins on a Citrix XenApp server or a Windows Server that has the Remote Desktop Services role deployed.

- Installing Lite Outlook Plugin

- Installing Classic Outlook Plugin

- Troubleshooting a Sage CRM plugin installation

Installing Lite Outlook Plugin

To make the Lite Outlook Plugin available to users who access Sage CRM via Citrix XenApp, install the plugin on the Citrix XenApp server, and then modify the registry key to hide the plugin from the users who are not supposed to use it.

For instructions, see "Using Active Directory Group Policy to install the Lite Outlook Plugin" in the *System Administrator Help* in the Sage CRM Help Center.

Alternatively, you can allow users to install the Lite Outlook Plugin manually. To do so, log on to the Citrix XenApp server for each user under their own profile and install the plugin on a user-by-user basis.

Installing Classic Outlook Plugin

To install the Classic Outlook Plugin for users who access Sage CRM via Citrix XenApp, log on to the Citrix XenApp server for each user under their profile and install the plugin on a user-by-user basis. Make sure you install the plugin to a separate folder for each user.

Before you begin

Before installing the Classic Outlook Plugin, make sure that:

- Iexplore.exe and Outlook.exe processes are not running on the Citrix XenApp server.

- The latest Service Pack is applied to the Microsoft Office suite.

- All users and administrators have disconnected from the Citrix XenApp server.
  If a user or administrator is connected to the server while the plugin is being installed, registry settings or .dll files required for the installation can become unavailable.

When the plugin is installed

After installing the plugin, open Registry Editor (regedit.exe) and make sure that the value of the **LoadBehavior** key in the following locations is set to **3**:

- `HKLM\Software\Microsoft\Office\Outlook\Addins\crmoutlookplugin.OutlookCRMPlugin`

- `HKCU\Software\Microsoft\Office\Outlook\Addins\OutlookAddIn2003`

Also make sure that:

- **None of the users uninstall the plugin**. If they do, the plugin may stop working properly or become unavailable for all users. In this case, you'll need to reinstall the plugin from scratch.

- **All the users are connecting to the same Citrix XenApp server**. The Classic Outlook Plugin doesn't support multi-server Citrix XenApp environments. This is because the plugin stores sync data and mapping files on the first server where it has been installed and synced from.

Troubleshooting a Sage CRM plugin installation

Complete the steps in this section if the installation of the Lite Outlook Plugin or Classic Outlook Plugin fails or if the plugin doesn't work properly, for example, the options it provides are not available to all users.

1. Locate the following folder that was created during the plugin installation:

   %UserProfile%\AppData\Local\Temp\<*Integer*>\otlplugin

   where <*Integer*> can be any number.

2. Copy the **otlplugin** folder to the **Temp** folder, and then delete the <*Integer*> folder. As a result, the path to the **otlplugin** folder will look as follows:

   %UserProfile%\AppData\Local\Temp\otlplugin

3. Reinstall the plugin.

   Now the plugin should install successfully and the options it provides should be available to users accessing Microsoft Outlook over Citrix XenApp or RDS.