

# Attachment Extractor for MS CRM 2011 User Guide

User Guide (How to work with Attachment Extractor for MS CRM 2011)

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## 1. General

AttachmentExtractor offers you a service based tool to move attachments from within your CRM 2011 to either a Sharepoint location or a fileshare, saving precious database space on the CRM 2011 and enabling various indexing & search options via Sharepoint and Microsofts Search Server functionality.

AttachmentExtractor is able to connect to any Microsoft Dynamics CRM 2011 (onPremise, online and hosted), and offers extracting email and note attachments, as well as extracting the email and note item itself for indexing its contents (both email and note descriptions are NOT changed, just replicated to an indexable file).

### 2. Trial Mode Restrictions

In trial mode the service will stop after each processed batch of items. The processing batch size is limited to 25 items per cycle and a maximum of 5000 Items is supported in total.

## 3. Detailed functionality

Attachment Extractor will install a separate Service for each configured Organization.

AttachmentExtractor requires the "url" extension to be allowed in CRM. During setup, AttachmentExtractor modifies the blocked extensions List in CRM to allow "url". (This setting can be found in the system settings of your CRM Organisation)

Each service will be listed in the Windows Service overview seperately (See section 9, Additional information for a sample screenshot)

The Services **<u>cannot</u>** be started directly from the servicemanagement, but need to be launched via the ServiceManagement Application, which is installed with the product.

AttachmentExtractor creates a new application log named <u>www.mscrm-addons.com</u> where statusinformation, errors and batchprocess summaries are logged. This is independent of the extended logging features available in the service configuration panel.

Batches are processed every 100 seconds.

With every batch processed, AttachmentExtractor analyses the emails and/or notes, saves the attachment to the configured location (FileShare or SharePoint) and then replaces the existing attachment with a url-file pointing to the new location. The new attachment is usually less than 500 bytes in size.

In addition the email or annotation item can be saved itself to allow indexing and searching in the actual entities description fields. If you choose to index those entities, the file saved to the external location will also contain some meta information, as for example with an email the subject, from, to, cc and bcc are also saved into the content file.



If you are using a sharepoint save location, additional attributes will be created with the documents

- CrmBackLink Containing a link to the actual CRM item
  EntityGuid
- The unique ID of the itemEntityTypeName
- The name of the Entity in CRM
- IsCrmRecord Indicating if this item is an actual CRM record, or an attachment
- LinkGuid Containing the GUID and TypeName as a csv list for the attributes specified below
- LinkData Containing the display values for the attributes specified below
- EntityDate The createdon date of the item in CRM

A comma seperated list of the following items is saved into the Sharepoint Attributes. The Attributes are seperated by a semicolon:

For Email:

"from", "to", "cc", "bcc", "subject", "regardingobjectid"

For Annotation (Note):

"subject", "filename", "filesize", "notetext", "objectid"

Please note, that the attributes are set for both the attachments and the actual entity.

The Attachment Extractor creates a weekly subfolder, based on the createdon date of an item:

2009 Week52 (21-12-2009 to 27-12-2009) 27.04.2012 13:43



# 4. Overview - ServiceManagement

Add New Service
New service setup
Active Services
Inactive Services
AttachmentExtractorService_PTMEDVSystemeGmbH crm2011r3 5555(sp)
AttachmentExtractorService_PTMEDVSystemeGmbH crm2011r6-de 5555(sp)
AttachmentExtractorService_PTMEDVSystemeGmbH crm2011r3 5555(fs)

#### Add New Service

• New service setup: Start here to create a new Service

When creating a new service, you need to give it a descriptive service name, that name cannot be changed once set.

Active Services: A list of all running services

Inactive Services: A list of all inactive services



# 5. Configuration of a Service

General Extraction	n Storage options Crm Connection Setup License Log	
ServiceName		
ServiceName:	AttachmentExtractorService_PTMEDVSystemeGmbH_crm2011r3_5555(sp) (Once set, the servicename cannot be changed again)	<u>*</u>
General		
Logfile Path:	C:VAELog	
Min. Attachment Size:	32 🔹 kb 💌	
Blocked Extensions:	ade;adp;app;bas;bat;chm;cmd;com;cpl;crt;csh;ewef;kp;hlp;hta;inf;ins;ispjs;jas;ks h;lnk;mda;mdb;mde;mdt;mdw;mdz;msc;msi;msp;mst;ops;pcd;pif;prf;prg;reg;scf;sc r;sct;shb;shs;url;vb;vbs;vbs;vsc;wsf;wsh;	
CRM Data Processing:	COPY - Keep all CRM Data	
Batch Size:	50 *	
Processedflag Field:	ptm_isprocessed	
Process these Emails:	Canceled     PendingSend       ✓ Completed     ✓ Received       □ Draft     □ Sending       □ Failed     ✓ Sent	
Other:	Activate Debugging	
Stop Service Start S	Service Delete	Save service configuration

- Logfile Path: The Path where the extended logging for this service is saved
- Min. Attachment Size: The minimum file size for an attachment to be extracted
- Blocked Extensions: defines the files, that will be rejected due to their extension
- **CRM Data Processing:** Select to MOVE or COPY your CRM data. Attention! A move of data cannot be undone.
- Batch Size: Number of items to be processed per step
- Format:
  - $\circ$  Strip HTML Tags : Tries to remove the HTML tags from an email body
  - Encoding : Option to change encoding. ATTENTION! The encoding must be supported by your search method, if you want to search inside the files extracted.
- Process these Emails: Select the states an email can have to be processed.
- Other:
  - Activate debugging : Enable extended logging



## 6. Extraction

General	Extractio	n Storage options	Crm Connection Setup License Log	
Email				
Items to ir	ndex:	🗹 Email	🗹 EmailAttachment	
Update It	ems:	🗖 Email		
Strip HTML T	ags:	V		
Notes				
Items to ir	ndex:	✓ Note	✓ NoteAttachment	
Update It	ems:	🗖 Note		
Other				
Encod	ding:	Unicode (UTF-8) / utf-8	•	
Stop on E	irror:	V		
Excluded B	Entities:	ptm_mscrmaddons_dcpl	templates;	_
		If the note is attached to an er	ntity of the a bove listed, it will not be extracted	
Stop Service	start	Service Delete		Save service configuration

#### • Email & Notes : Items to Index:

Selecting Email or Note will extract the Email/Note body and save it as a File.

Selecting EmailAttachment or NoteAttachment does process the attachment ONLY

Update Items updates existing Email/Note files.

- Other
  - Encoding specifies the encoding of the text files. Make sure its compatible with any further processing like Microsoft Search Server
  - $\circ$   $\;$  Stop on Error : The service will also shut down on non-critical errors.
  - Excluded Entities : Contains a list of entities, which notes will not be processed by the Extraction.



# 7. Storage Options

Storage options	
Active storage option: Use Sharepoint	•
Sharepoint	
Sharepoint Browser:	
🛩 http:// 🝷 🚾 W2K8-SP2010 🔄 : 8888 🔀 /AttachmentExtractor 🝷 🔤 crm2011r3	-
Channel and the second s	
Sharepoint user:  administrator@ptm-edv.at	
Password:	۲
File Storage	
	= 1
Internal Path:	
Internal Path:	]
Internal Path:	

Active Storage: Select, if you want to use SharePoint or a Fileshare

#### **SharePoint**

- **SharePoint Navigation:** Enter your sharepoint server and port or select from the dropdown list. Browse through your sites and Libraries to specify the storage location. You MUST select a library.
- **SharePoint User:** The Username of the SharePoint User
- **Password:** The Password of the SharePoint User (Click on the Eye to see your Password unencrypted)

#### File Storage

- Internal Path: Choose the local Path of the Storage (e.g.: C:\AE\Files)
- External Path: Choose the external Path of the Storage, as it would be accessed by the users (<u>\\fileserver\AE\Files</u>)



## 8. CRM-Connection Setup

Standard (onPre     CRM Server-Url:	emise) 🔿 IFD (Hos	ted) O CRM Online O Office 365
http:// 🔻 crm20	11r3:5555	
Authenticated as: Use default Crede Jsername Crm4fullac	entia <b>ptm-edv.at\Crm4</b> cess Dor	Ifuliaccess main ptm-edv.at Password
Organization informat	tion:	Retrieve all Organizations
ala sa alla sa ana a	Unique name	ServiceURL
PTM EDV System		PTMEDVSystemeGmbH
riendly name PTM EDV System Crm	PTMEDVSystemeG crm	PTMEDVSystemeGmbH crm
PTM EDV System		

- CRM Server-Url: Url of the CRM-Server you want to use
- Authenticated as: Decide if you want to use default Credentials (not recommended, as the service is run as Networkservice and that user usually doesn't have CRM access) or if you want to log on with other credentials (always use administrator)
- Retrieve all Organizations: Get all Organizations from the selected CRM-Server
- **Organization information:** Friendly name, unique name and ServiceURL of each Organization



## 9. License

Licenseinformation	LicenseValue	Systemvalue	Statu
Licensemodel			1
Licensekey (Trial)	Trialkey		0
ense validation information			
Licenseinformation	Systemvalue		Statu
BusinessUnit	PTMEDVSystemeGmbH		✓
Number of site licenses	28		*
Licenses for Readonly Users	0		*
Expiration	30.05.2012 18:37:11 (Expired)		2
Support			*
Issued product	AttachmentExtractor		· · · · · · · · · · · · · · · · · · ·
Version upgrade covered till	01.01.0001 00:00:00		*
ense Summary			
nse Summary Licenseinformation	LicenseValue	Systemvalue	Statu

This overview is enabling you to quickly check your license state. If the license is invalid, the service will not start.

While in Trial mode (as seen in the sceenshot), the service will terminate after each batch and only work through a maximum of 5000 items total. After reaching that margin, it will stop completely.



ieneral Extraction Storage options Crm Connection Setup License Lo	g
ventLog	
essage	TimeStamp 🔁

The log provides an excerpt of the AttachmentExtractors eventlog, filtered for this specific service. This helps you to identify any issues with the service.

Double clicking on an entry in the list brings up the full description in a messagebox.



# **11.** Additional Information

nste (Lokal)	O Dienste (Lokal)				
	AttachmentExtractorService_PTMEDVSystemeGmbH]crm2011r3 5555	Name	Beschreibung	Status	Starttyp
	(fs)	C Anmeldedienst	Unterstützt einen sicheren Kanal zwis-	Gestartet	Automa.
	Den Dienst starten	Q. Anmeldeinformationsverwaltung	Ermöglicht das sichere Speichern un		Manuell
	Den Dienst starten	Anschlussumleitung für Remotedesktopdienst im Benutzermodus	Ermöglicht die Umleitung von Druck	Gestartet	Manuell
		Anwendungserfahrung	Verarbeitet Anwendungskompatibilit	Gestartet	Manuell
		G Anwendungsidentität	Bestimmt und überprüft die Identität		Manuell
		Anwendungsinformationen	Erleichtert das Ausführen von interak		Manuell
		Anwendungsverwaltung	Verarbeitet Installations-, Deinstallati		Manuell
		Q. Arbeitsstationsdienst	Erstellt und wartet Clientnetzwerkver	Gestartet	Automa.
		G ASP.NET State Service	Provides support for out-of-process		Manuell
		AttachmentExtractorService_PTMEDVSystemeGmbHjcrm2011r3j5555(fs)		Wird gestartet	Automa.
		Q Aufgabenplanung	Ermöglicht einem Benutzer, automat	Gestartet	Automa.
		Automatische Konfiguration (verkabelt)	Mit dem Dienst für die automatische		Manuell
		C Automatische WLAN-Konfiguration	Der WLANSVC-Dienst bietet die erfor		Manuell
		🔍 Basisfiltermodul	Das Basisfiltermodul ist ein Dienst, d	Gestartet	Automa.
		🧠 Benachrichtigungsdienst für Systemereignisse	Überwacht Systemereignisse und be	Gestartet	Automa.
		Renutzerprofildienst	Dieser Dienst ist für das Laden und A	Gestartet	Automa.
		🧠 Bing Bar Update Service	Keeps Bing Bar up-to-date. Disabling		Manuell
		RitLocker-Laufwerkverschlüsselungsdienst	BDESVC hostet den BitLocker-Laufw		Manuell
		😪 Blockebenen-Sicherungsmodul	Der WBENGINE-Dienst wird von der		Manuell
		🧠 Bluetooth-Unterstützungsdienst	Die Erkennung und Zuordnung von		Manuell
		G BranchCache	Mit diesem Dienst werden Netzwerki		Manuell
		G Claims to Windows Token Service	Dienst zum Konvertieren von auf An		Manuell
		Q CNG-Schlüsselisolation	Der CNG-Schlüsselisolationsdienst w	Gestartet	Manuell
		COM+-Ereignissystem	Unterstützt den Systemereignis-Bena	Gestartet	Automa.
		COM+-Systemanwendung	Verwaltet die Komponentenkonfigur		Manuell
		Computerbrowser	Führt eine aktuelle Liste der Comput	Gestartet	Manuell
		Q DCOM-Server-Prozessstart	Mit dem DCOMLAUNCH-Dienst wer	Gestartet	Automa.
		🔍 Defragmentierung	Stellt Funktionen zur Datenträgerfrag		Manuell
		Q Designs	Stellt die Designverwaltung zur Verfü	Gestartet	Automa.
		C DHCP-Client	Registriert und aktualisiert IP-Adress	Gestartet	Automa.
		Q Diagnosediensthost	Der Diagnosediensthost wird vom Di	Gestartet	Manuell
		🧠 Diagnoserichtliniendienst	Der Diagnoserichtliniendienst ermög		Automa.
		🖓 Diagnosesystemhost	Der Diagnosesystemhost wird vom D		Manuell
		21 ····			

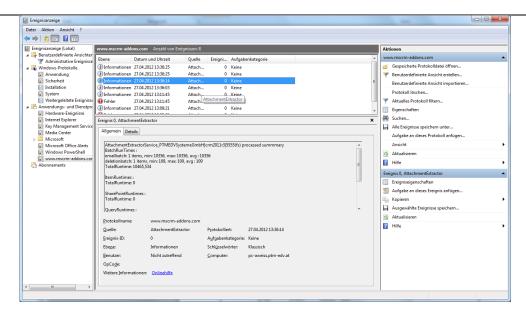
The services panel allows you to check the service status. You can only stop the services from here, but NOT start them anew.

🔿 🔁 📰 🔽 📰							
Ereignisanzeige (Lokal) 😽 Benutzerdefinierte Ansichter	www.mscrm-addons.co	com Anzahl von Ereignissen: 8				Aktionen	
Benutzerderinierte Ansichter Weinistrative Ereignisse	Ebene Datu	um und Uhrzeit Quelle	Ereigni	Aufgabenkategorie	~	www.mscrm-addons.com	
Windows-Protokolle	Informationen 27.0	04.2012 13:36:25 Attach.	0	Keine		o Gespeicherte Protokolldatei öffnen	
👔 Anwendung	<li>Informationen 27.0</li>	04.2012 13:36:25 Attach.	0	Keine		Panutzerdefinierte Ansicht erstellen	
💽 Sicherheit	Informationen 27.0			Keine	E	Benutzerdefinierte Ansicht importieren	
Installation	Informationen 27.0			Keine		Protokoll löschen	
System	Informationen 27.0			Keine			
Weitergeleitete Ereignisse Anwendungs- und Dienstpro		04.2012 13:11:45 Attach.		Keine		Aktuelles Protokoll filtern	
Hardware-Ereignisse		04.2012 13:09:21 Attach.		Keine	*	Eigenschaften	
Internet Explorer	Ereignis 0, AttachmentE				×	👭 Suchen	
🙀 Key Management Service		childetor				Alle Ereignisse speichern unter	
🛃 Media Center	Allgemein Details					Aufgabe an dieses Protokoll anfügen	
Microsoft						Ansicht	
Microsoft Office Alerts	AttachmentExtracto	orService_PTMEDVSystemeGmbl	4[crm2011r3]5	55(ts) has started successfully			
www.mscrm-addons.cor						Aktualisieren	
Abonnements				👔 Hilfe			
				Ereignis 0, AttachmentExtractor			
				Ereigniseigenschaften			
						Aufgabe an dieses Ereignis anfügen	
						Kopieren	
						Ausgewählte Ereignisse speichern	
	Protokoliname:	www.mscrm-addons.com				Aktualisieren	
	Quelle:	AttachmentExtractor	Protokollier	27.04.2012 13:36:03		🛛 Hilfe	
	Ereignis-ID:	0	-	tegorie: Keine			
		-					
	Ebene:	Informationen	Schlüsselwi				
	Benutzer:	Nicht zutreffend	Computer:	pc-aweiss.ptm-edv.at			
	OpCo <u>d</u> e:						
		nen: Onlinehilfe					

The eventviewer is showing key events for each service.

#### User Guide







### 12. Contact

If you have problems with the product send an Email to support@mscrm-addons.com or call +43 316 680 880 0