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 **cannot** 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 www.mscrm-addons.com 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 item
- EntityTypeName
  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:

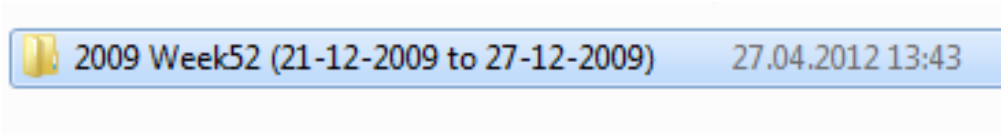
```
"from", "to", "cc", "bcc", "subject", "regardingobjectid"
```

For Annotation (Note):

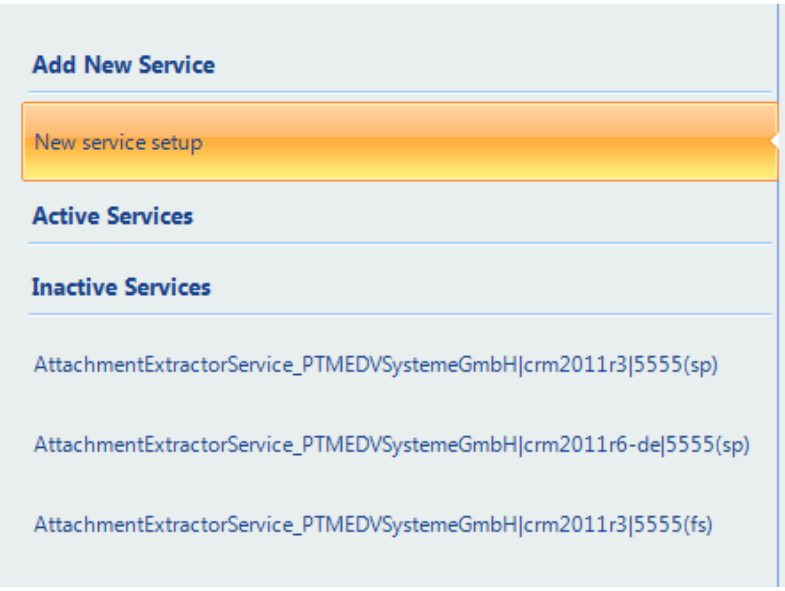
```
"subject", "filename", "filesize", "notetext", "objectid"
```

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:



4. Overview - ServiceManagement



Add New Service

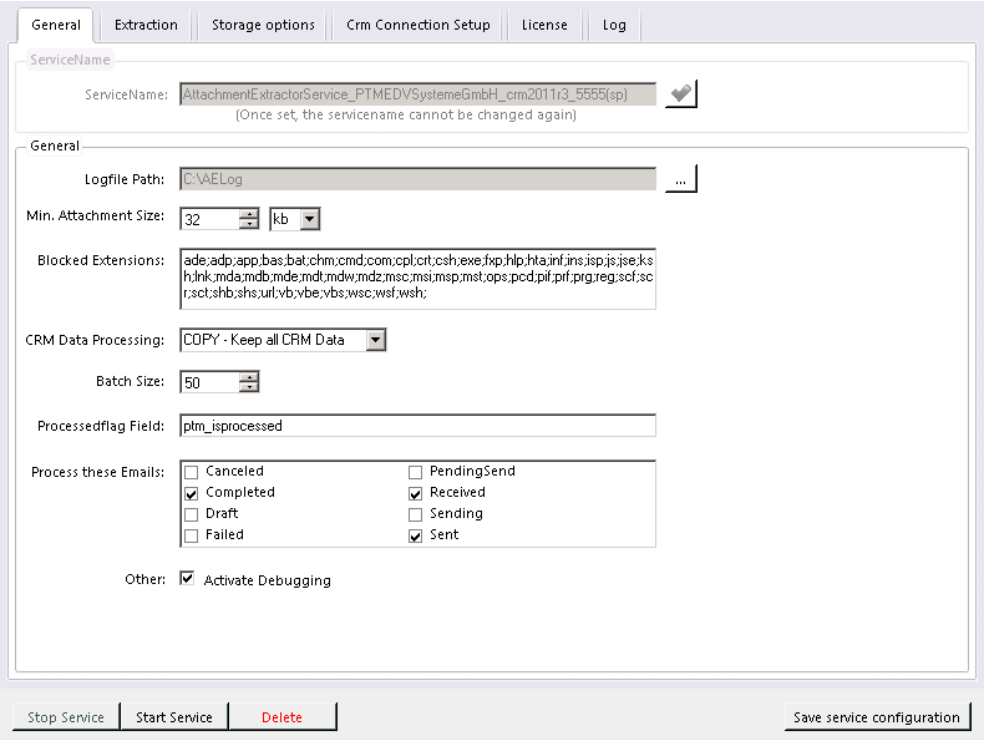
- **New service setup:** Start here to create a new Service

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

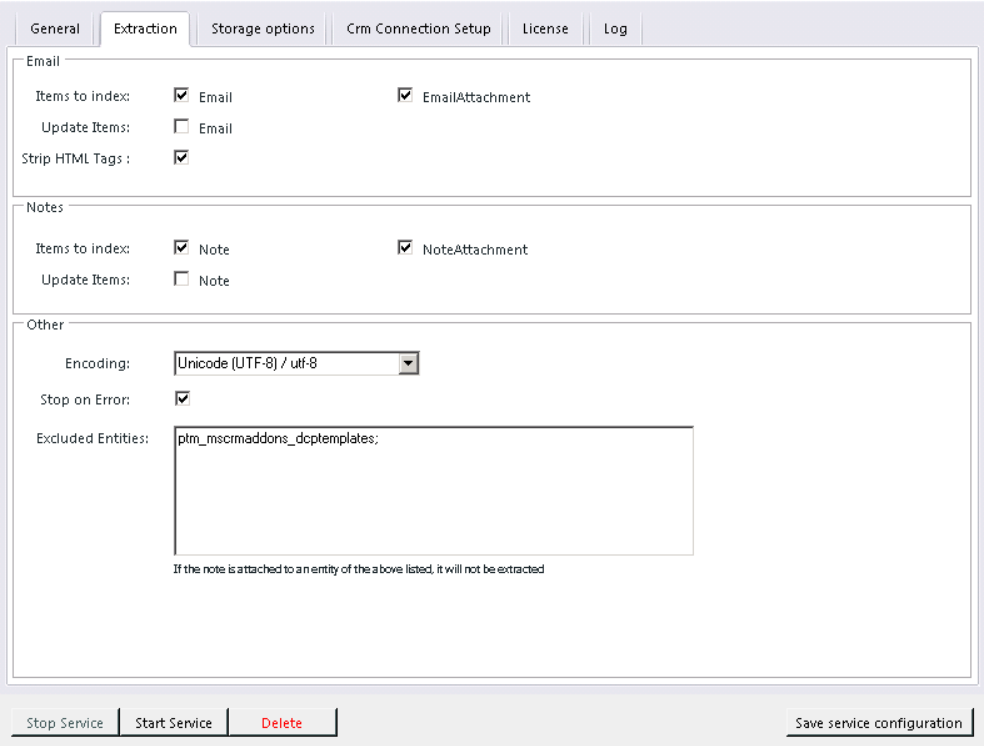
Inactive Services: A list of all inactive services

5. Configuration of a Service



- **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:**
  - 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



- **Email & Notes : Items to Index:**

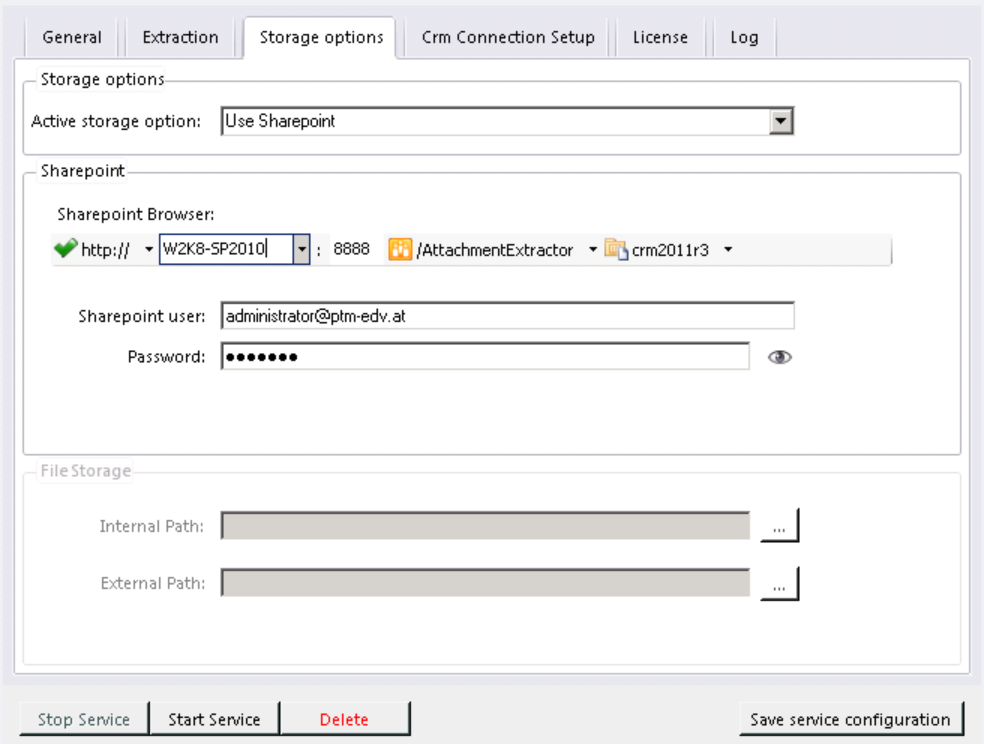
  Selecting Email or Note will extract the Email/Note body and save it as a File.

  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
  - 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



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

SharePoint

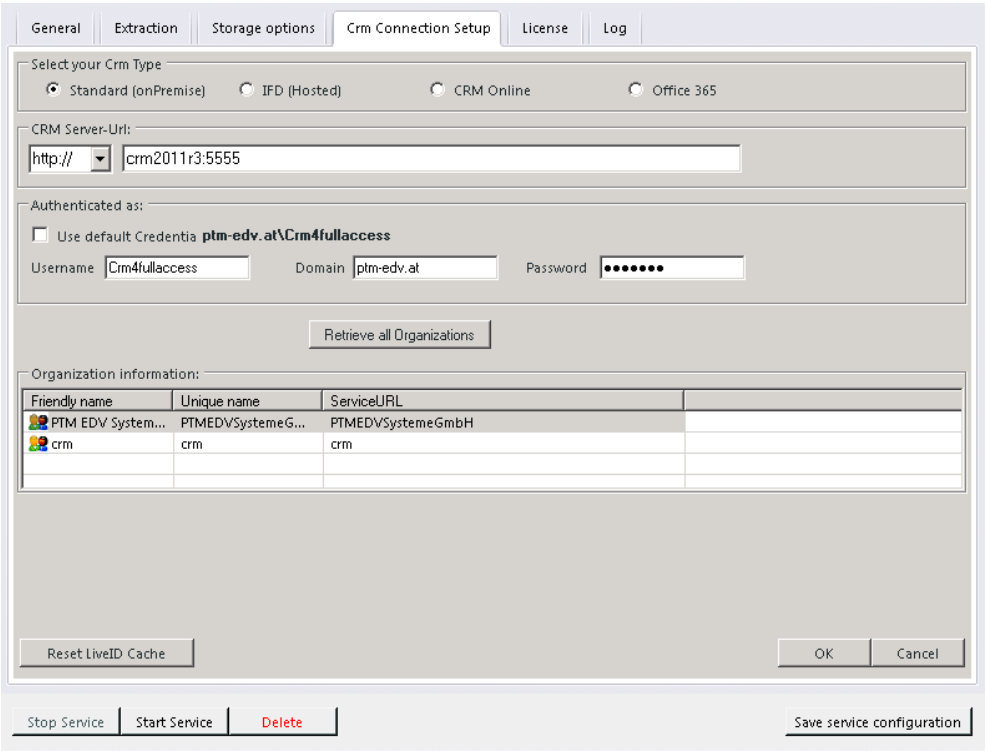
- **SharePoint Navigation:** Enter your sharepoint server and port or select from the dropdown list. Browse through your sites and Libraries to specify the storage location. You MUST select a library.

- **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

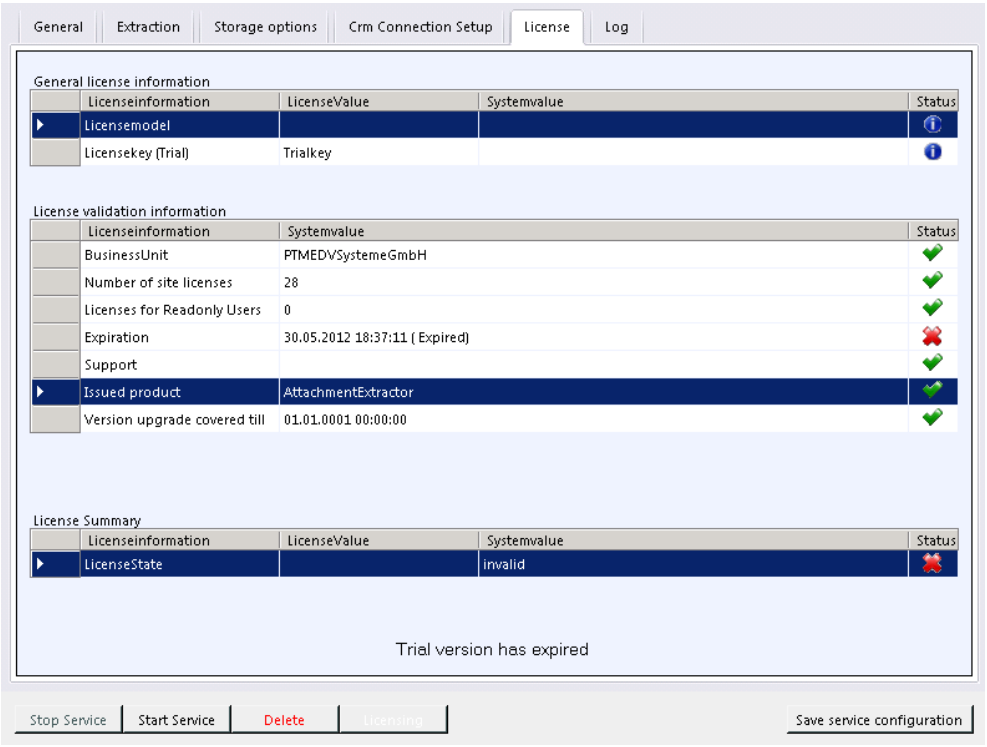
- **Internal Path:** Choose the local Path of the Storage (e.g.: C:\AE\Files)
- **External Path:** Choose the external Path of the Storage, as it would be accessed by the users (\\fileserver\AE\Files)

8. CRM-Connection Setup



- **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

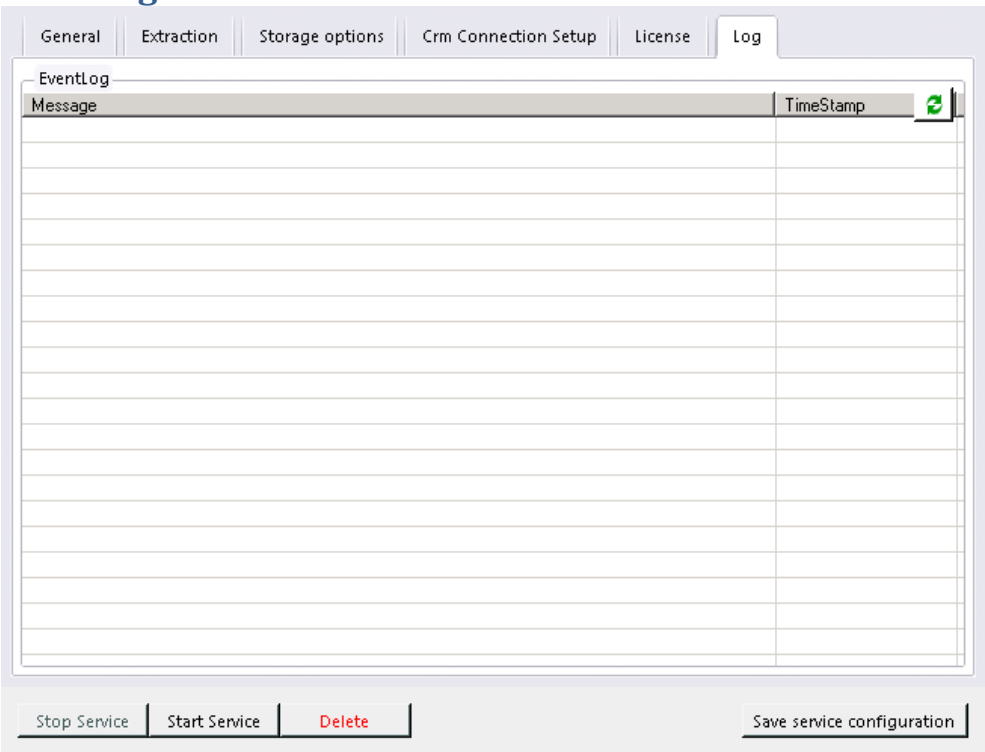
9. License



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.

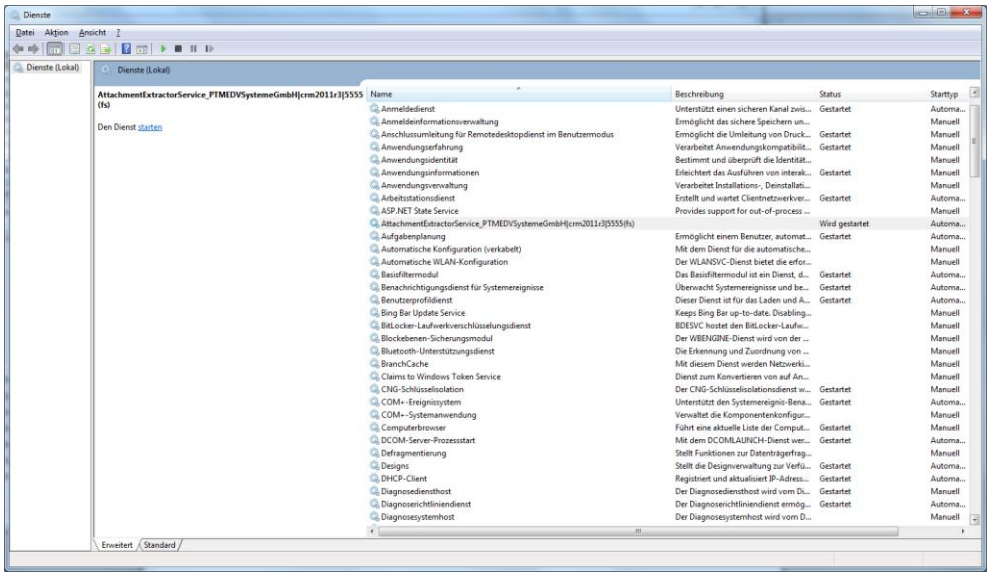
10. Log



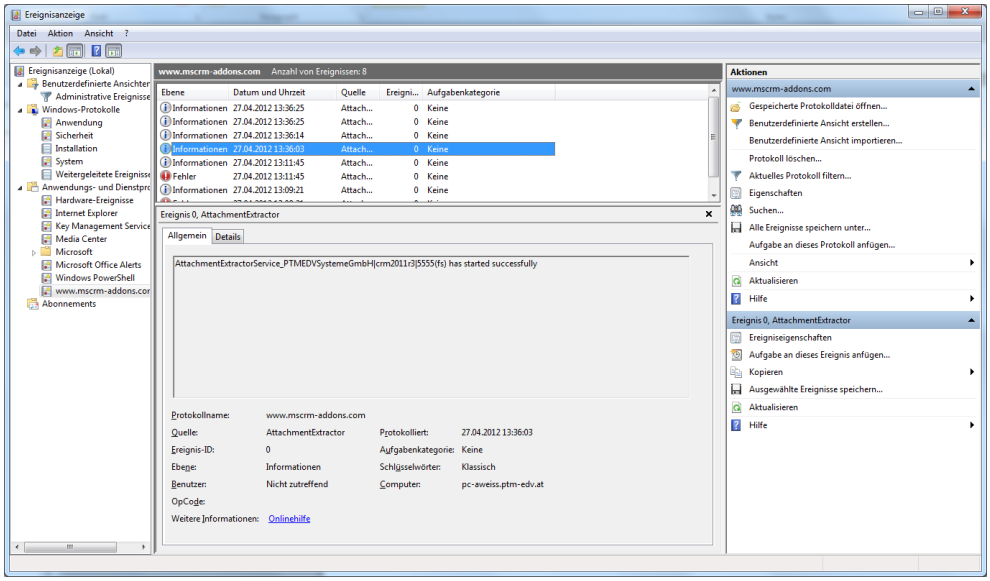
The log provides an excerpt of the AttachmentExtractors eventlog, filtered for this specific service. This helps you to identify any issues with the service.

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

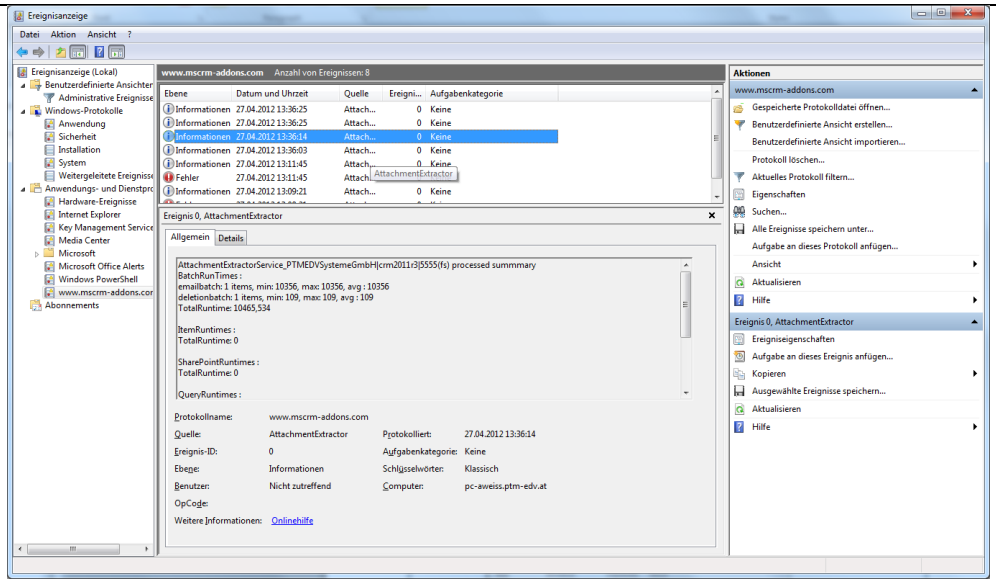
11. Additional Information



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



The eventviewer is showing key events for each service.


Ereignisanzeige
Datei Aktion Ansicht ?
Ereignisanzeige (Lokal)
Benutzerdefinierte Ansichter
Administrative Ereignisse
Windows-Protokolle
Anwendung
Sicherheit
Installation
System
Weitergeleitete Ereignisse
Anwendungs- und Dienstprc
Hardware-Ereignisse
Internet Explorer
Key Management Service
Media Center
Microsoft
Microsoft Office Alerts
Windows PowerShell
www.mscrm-addons.cor
Abonnements
www.mscrm-addons.com Anzahl von Ereignissen: 8
Ebene Datum und Uhrzeit Quelle Ereigni... Aufgabenkategorie
Informationen 27.04.2012 13:36:25 Attach... 0 Keine
Informationen 27.04.2012 13:36:25 Attach... 0 Keine
Informationen 27.04.2012 13:36:14 Attach... 0 Keine
Informationen 27.04.2012 13:36:03 Attach... 0 Keine
Informationen 27.04.2012 13:11:45 Attach... 0 Keine
Fehler 27.04.2012 13:11:45 Attach...
Informationen 27.04.2012 13:09:21 Attach... 0 Keine
AttachmentExtractor
Ereignis 0, AttachmentExtractor
Allgemein Details
AttachmentExtractorService_PTMEDVSystemeGmbH|crm2011r3|5555(fs) processed summmary
BatchRunTimes :
emailbatch: 1 items, min: 10356, max: 10356, avg : 10356
deletionbatch: 1 items, min: 109, max: 109, avg : 109
TotalRuntime: 10465,534
ItemRuntimes :
TotalRuntime: 0
SharePointRuntimes :
TotalRuntime: 0
QueryRuntimes :
Protokollname: www.mscrm-addons.com
Quelle: AttachmentExtractor Protokolliert: 27.04.2012 13:36:14
Ereignis-ID: 0 Aufgabenkategorie: Keine
Ebene: Informationen Schlüsselwörter: Klassisch
Benutzer: Nicht zutreffend Computer: pc-aweiss.ptm-edv.at
OpCode:
Weitere Informationen: Onlinehilfe
Aktionen
www.mscrm-addons.com
Gespeicherte Protokolldatei öffnen...
Benutzerdefinierte Ansicht erstellen...
Benutzerdefinierte Ansicht importieren...
Protokoll löschen...
Aktuelles Protokoll filtern...
Eigenschaften
Suchen...
Alle Ereignisse speichern unter...
Aufgabe an dieses Protokoll anfügen...
Ansicht
Aktualisieren
Hilfe
Ereignis 0, AttachmentExtractor
Ereigniseigenschaften
Aufgabe an dieses Ereignis anfügen...
Kopieren
Ausgewählte Ereignisse speichern...
Aktualisieren
Hilfe

12. Contact

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