



DocumentsCorePack for MS CRM 2011

Version 5.0, December 2013

Installation Guide

(How to install/uninstall DocumentsCorePack for MS CRM 2011)

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1 Common Information

Before installing **DocumentsCorePack Server for MS CRM 2011**, please read this document and follow the steps carefully.

1.1 Intended Audience

This guide is intended for system administrators who are familiar with the following administrative tasks:

- Maintaining and configuring SQL Server databases
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM Server

The installation consists of the following steps:
Follow each of the steps to complete the installation:

- Installing DocumentsCorePack Server for MS CRM 2011.
- Configuring DocumentsCorePack

2 License

The product comes with a 14-day trial license. Information about licensing can be found on www.mscrm-addons.com

3 Prerequisites

3.1 Microsoft .NET Framework 4.0 RTM is required

The RTM version of Microsoft .NET Framework 4.0 is required.

3.2 Supported CRM Versions

- Microsoft Dynamics CRM 2011 RTM On Premise
- Microsoft Dynamics CRM 2011 RTM Online
- Microsoft Dynamics CRM 2011 Hosted (IFD)

3.3 Windows Identity Foundation

The Windows Identity Foundation will be installed as part of the DocumentsCorePack Server Setup

3.4 Supported Operating Systems

- Windows 7 32/64bit
- Windows Vista 32/64bit
- Windows Server 2008 32/64bit
- Windows Server 2008 R2 32/64bit

4 Installation Server Component

You could install the DocumentsCorePack Server for Microsoft Dynamics CRM 2011 on every supported operating system which is able to connect to your CRM 2011 server. During the installation you have to specify at least one organization in which the DocumentsCorePack Server will be installed.

Possible Installation Scenarios:

Install directly on a CRM 2011 On-Premise Server

You could install the DCP Server directly on a CRM 2011 On-Premise installation. By doing so, you will have full functionality like File Explorer- or SharePoint-integration. When you specify an On-Premise Connection Profile, you have to run the setup on the CRM server.

1. *Install for CRM Online*

When you want to use CRM Online, you could install DCP on every supported operating system. You have to specify a valid CRM Online profile. In that case you have limited functionality of the DocumentsCorePack Server. You could not use the following features:

- a. SharePoint Folder and Site integration
- b. File Explorer integration
- c. Document Summary

Attention: After the setup is completed, you could start the DocumentsCorePack Server Configuration in the Windows Start-menu to install and configure the DocumentsCorePack Server in other CRM organizations.

4.1 Introduction

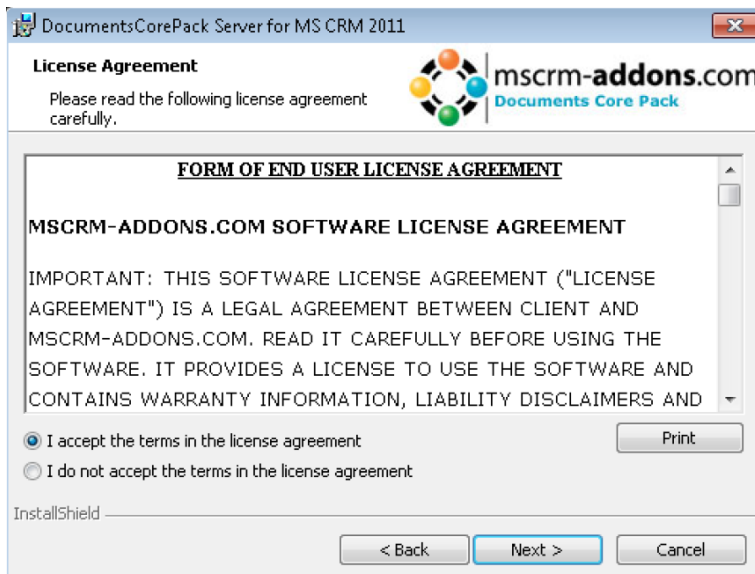
Run the DocumentsCorePack Server for MS CRM 2011 setup file. The following window will appear:



Click [Next] to proceed.

INFORMATION: If an upgrade is detected, a message will be shown and the setup will go to chapter 4.4 directly after accepting the EULA [4.2]

4.2 EULA (End User License Agreement)



Click [Next] to proceed.

4.3 Folder Selection

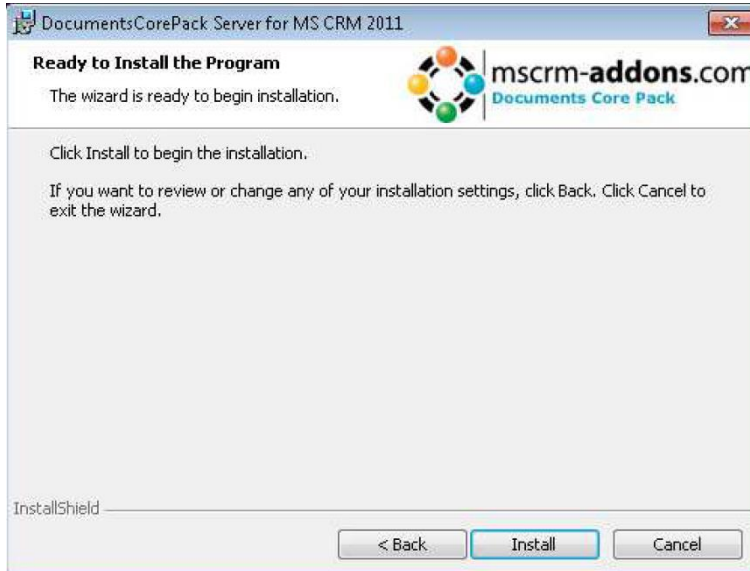
Here it's possible to set the installation directory.



Click [Change] to specify a different installation path. Click [Next] to proceed.

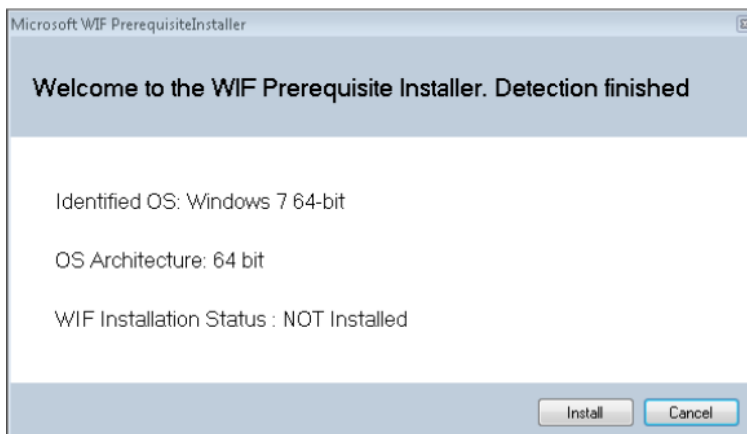
4.4 Confirm Installation

To start the installation, click on [Install].
To change the settings, click on [Back].



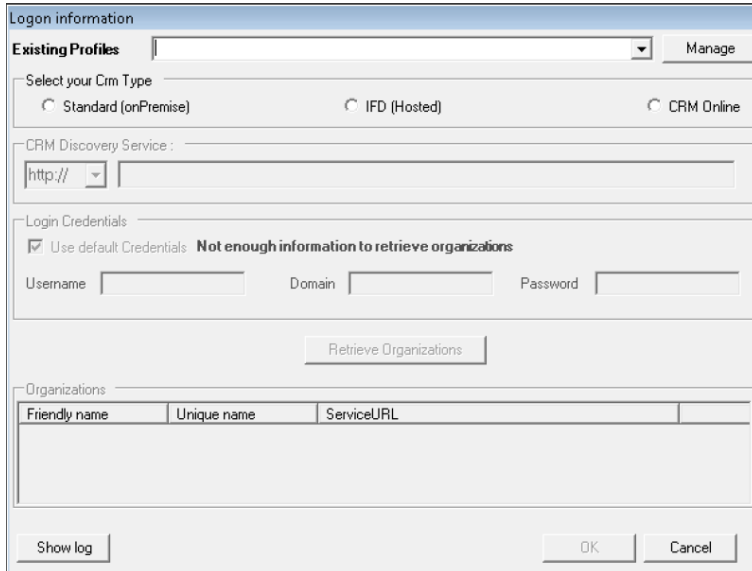
4.5 Install Windows Identity Foundation

To use the DocumentsCorePack Server for MS CRM 2011 you have to install the Windows Identity Foundation. This window will only pop up when the Windows Identity Foundation is not installed.



4.6 Configure CRM Server

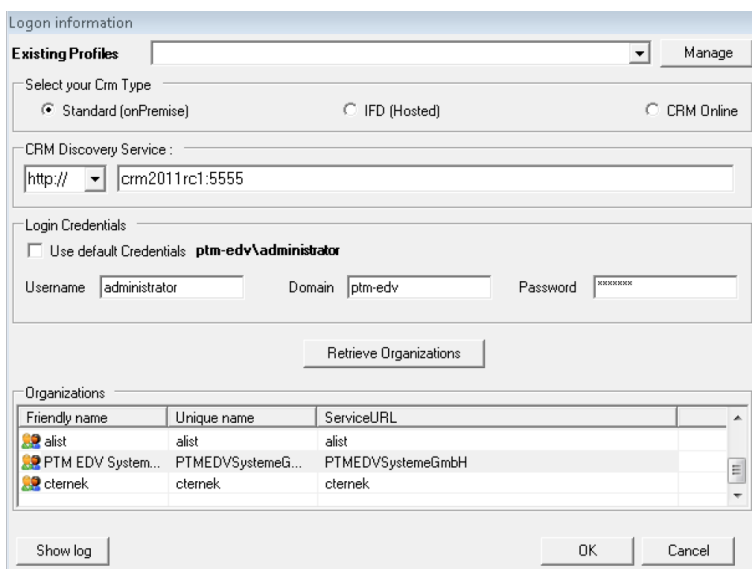
To configure your CRM server, select your profile or create a new profile and select your CRM Server type:



Choose the server path and add your login credentials by filling in the field's username, password and domain or choose the default credentials. As soon as the organizations are retrieved, press the "OK"-button.

For DocumentsCorePack, the IFD setup is only required when using FileExplorer, DocumentSummary or SharePoint Folder and Sites Integration. You have to install IFD before you can use it. You can find the IFD wizard here:

<http://www.mscrem-addons.com/Downloads/DownloadIFDToolforMSCRM2011/tabid/195/Default.aspx>



Friendly name	Unique name	ServiceURL
alist	alist	alist
PTMEDV SystemeG...	PTMEDVSystemeG...	PTMEDVSystemeGmbH
ctetek	ctetek	ctetek

4.7 Finish

The DocumentsCorePack Server Configuration will start automatically for the organization you selected during the setup.

5 Security Roles

General securityroles for all products:

The following securityrole is required by all our products:

MSCRM-Addons General Security Role

This security role contains the basic requirements for using the product itself and to be able to perform the license-check.

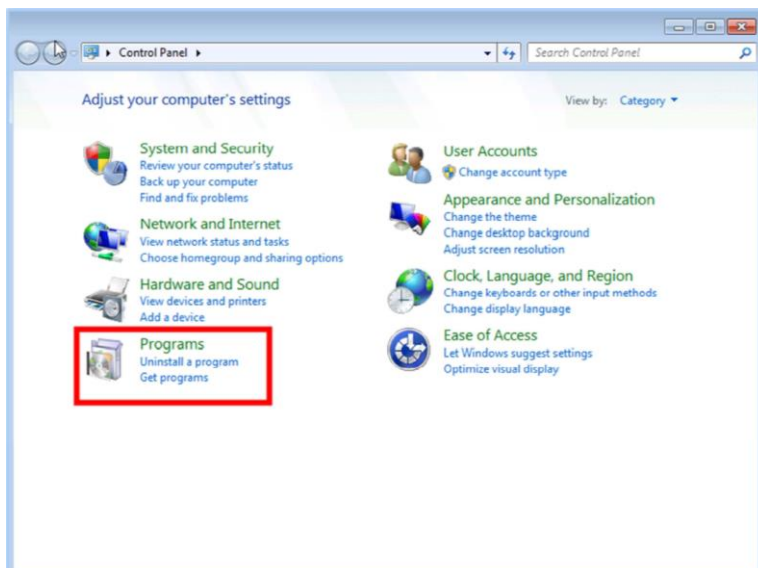
Product-specific securityroles :

Following securityroles are required only by specific products. All users that should work with the products require both the MSCRM-Addons General Security Role and the product-specific security roles.

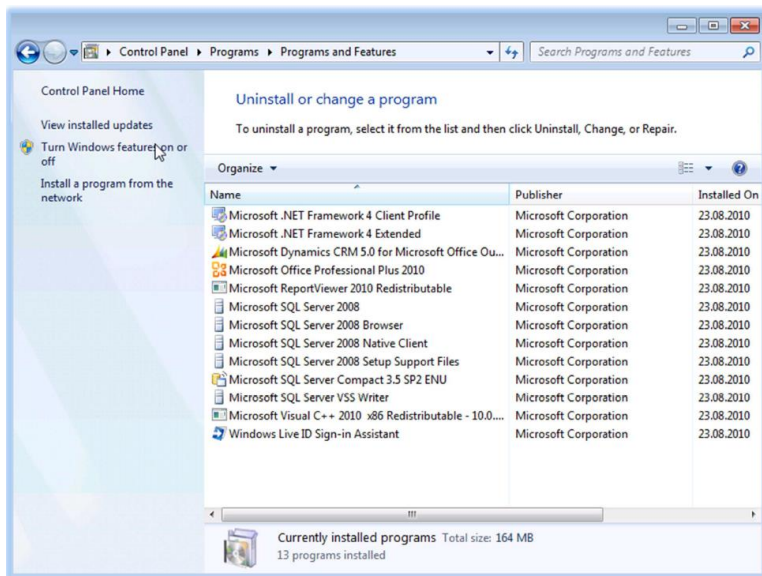
- **DocumentsCorePack:**
DocumentsCorePack Security Role
- **TelephoneIntegration:**
TelephoneIntegration Security Role

6 Uninstall Server Component

To uninstall DocumentsCorePack Server for MS CRM 2011 select "Programs" in the Control Panel.



Search for the DocumentsCorePack Server CRM 2011 in "Uninstall or change a program" to uninstall the DocumentsCorePack Server and follow the instructions.



7 Installing the client component

This chapter explains how to install the client component.

7.1 Installing the DocumentsCorePack Client

IMPORTANT Before installing the components:

1. Close all Office products (MS Word, MS Outlook...)
2. Be sure that the machine is online to the MS CRM server.

To ensure that Word and Outlook are not running, start the Windows **Task manager** and check that WINWORD.EXE and OUTLOOK.EXE are not running in the processes list.

Install the component on the client:

1. Run the "DocumentsCorePack Client for MS CRM 2011.exe" setup file.
You will see next window:

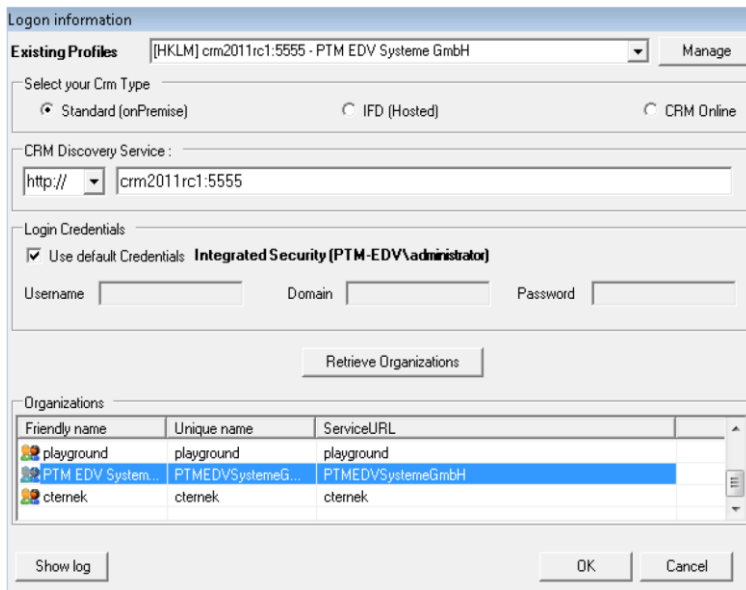


Click [Next >].

2. End User License Agreement (EULA)



MSCRM Server



Logon information

Existing Profiles: [HKLM] crm2011rc1:5555 - PTM EDV Systeme GmbH [Manage]

Select your Crm Type:

Standard (onPremise) IFD (Hosted) CRM Online

CRM Discovery Service:

http:// [crm2011rc1:5555]

Login Credentials:

Use default Credentials: **Integrated Security (PTM-EDV\Administrator)**

Username: [] Domain: [] Password: []

[Retrieve Organizations]

Friendly name	Unique name	ServiceURL
playground	playground	playground
PTM EDV System...	PTMEDVSystemeG...	PTMEDVSystemeGmbH
cternek	cternek	cternek

[Show log] [OK] [Cancel]

Enter the name of the CRM server.
This is the name you enter in the Internet Explorer (without http://).
Also enter the port number if it is not standard.
Click "OK".

3. Select the installation folder



DocumentsCorePack Client for MS CRM 2011

Destination Folder

Click Next to install to this folder, or click Change to install to a different folder.

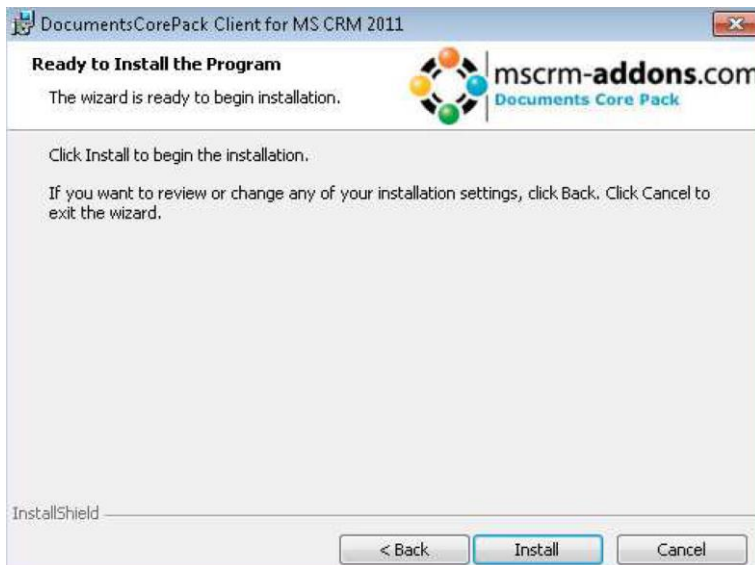
Install DocumentsCorePack Client for MS CRM 2011 to:
C:\Program Files (x86)\PTM EDV-Systeme GmbH\Documents Core Pack Client for MS CRM 2011\ [Change...]

InstallShield

[< Back] [Next >] [Cancel]

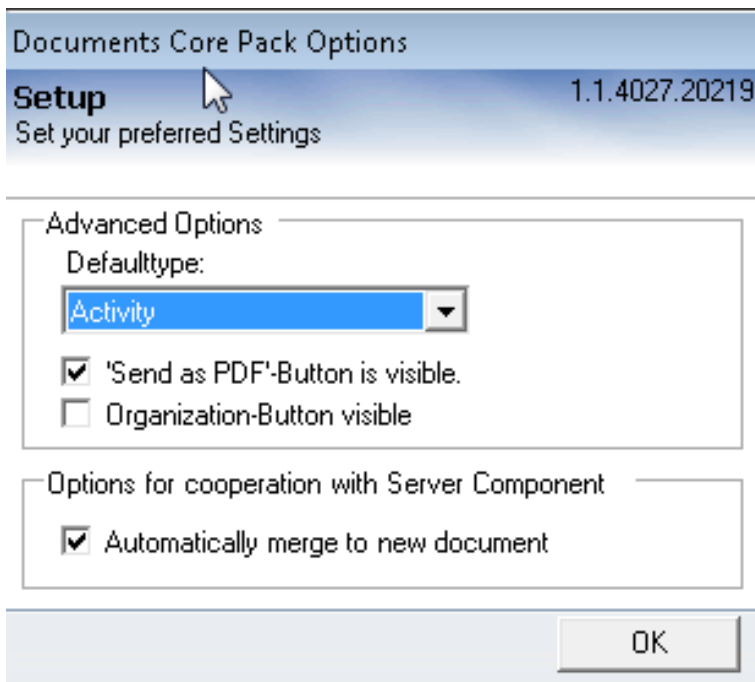
Click [Next >].

4. Confirm the installation.

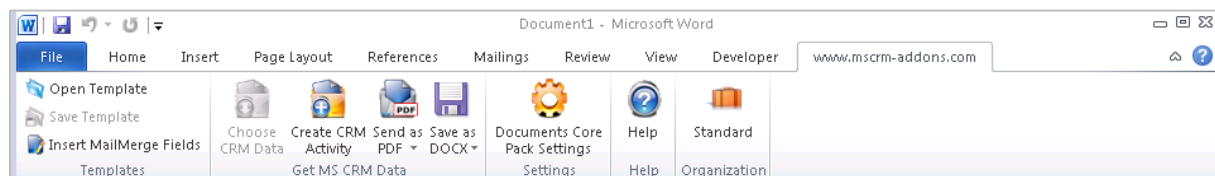
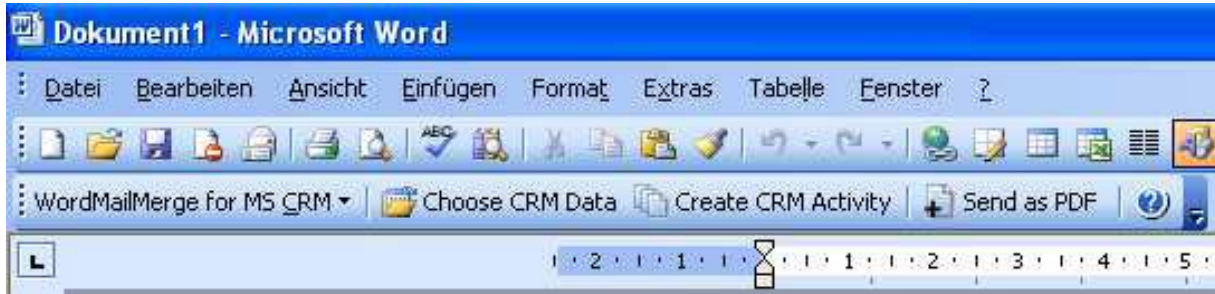


Click Install >.

5. Choose the preferred options you want to use and click on OK.



- After having finished the installation, go to your MS Word and you will see the following new toolbar with the buttons "Documents Core Pack for MS CRM", "Choose CRM Data", "Create CRM activity" and the optional buttons "Send as PDF" and "Get My Data":

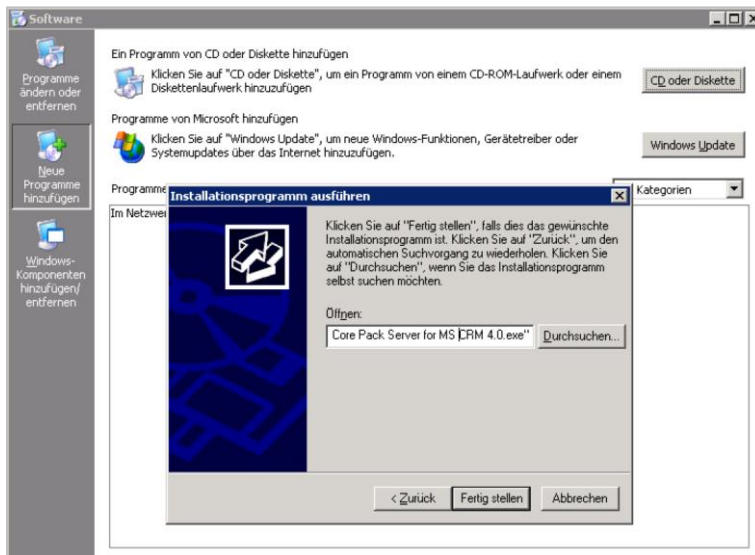


- The installation is now completed. Click on "Finish".

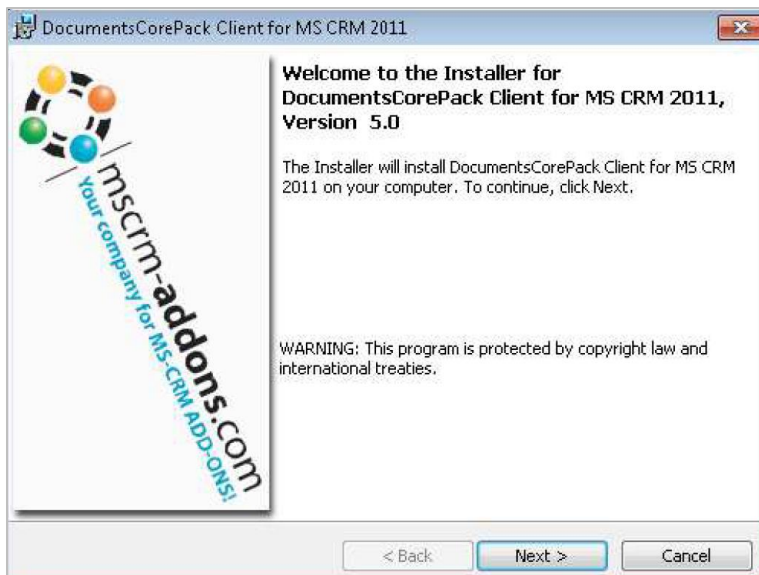


7.2 Installation on a Terminal Server

To install DocumentsCorePack on a terminal server, you have to open the Control Panel and then the Add/Remove Programs-option. Click on the „Add new programs“ button. Now click on the „CD or floppy disc“-button to open the installation wizard and chose the DCP setup file. Finally, you have to click on „Finish“ to start the installation.



You will see following window:



Click „Next“.

End User License Agreement (EULA)

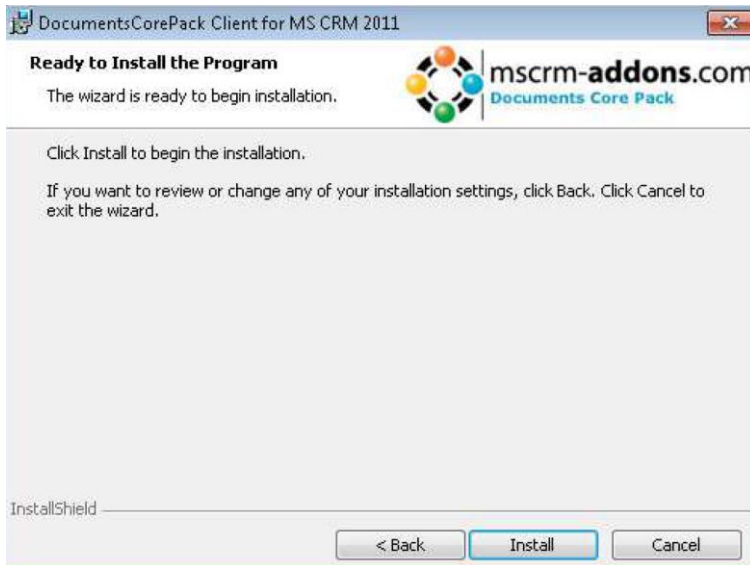


Select Installation folder.



Click [Next >]

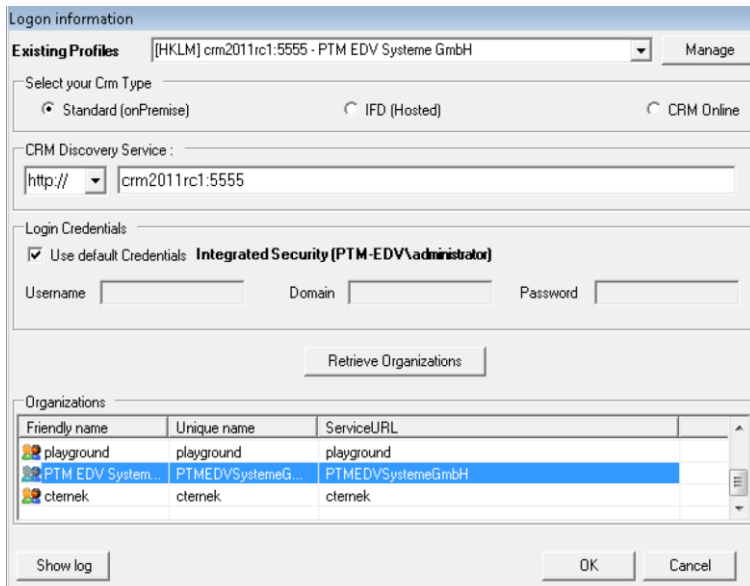
Confirm the installation



Click „install“.

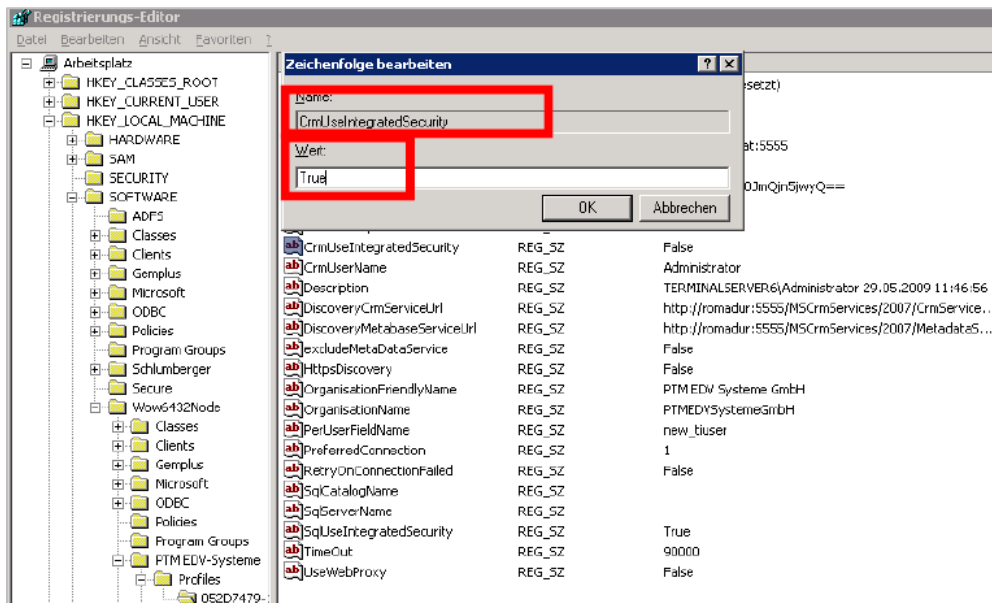
In the connection-dialog, you have to enter the CRM server-name with the port. (eg : servername : crm, port : 5555)

When installing on a terminal server, you have to change the “Login Credentials”. Uncheck the “Use default Credentials” and enter a valid username, domain and password.



IMPORTANT: Finally, you have to change a registry entry to use integrated security. Start > Run > „regedit“ and browse to “HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDVSysteme\” and choose the configured profile (you can see the profile used in the HKLM\SOFTWARE\PTM EDV Systeme\DocumentsCorePackclient2011\ActiveProfile Setting)

The regarding entry is called „**CrmUseIntegratedSecurity**“. Change the value to „**true**“.



7.3 Unattended Setup DocumentsCorePack Client for MS CRM 2011

To install the DocumentsCorePack Client for MS CRM 2011 unattended, you need to supply a registry file with the required registry settings.

The unattended install is available for the DocumentsCorePack Client Version 5.18 and above.

ATTENTION! The Microsoft Windows Identity Foundation software **MUST** be present previous to the installation or the installation will fail.

Download the [uai-Template.reg \(1.18 kb\)](#)

This is a blank registry file containing all required keys. You need to replace the following tags with your actual CRM data:

[YOURCRMSEVER:PORT] : The URL of the CRM server without any protocol information, e.g crm:5555.

[UNIQUEORGANISATIONNAME] : The unique name of the organization you want to connect to.

OrganisationFriendlyName contains the organization name and also influences the name of the RibbonToolbar in Mirosoft Word. While not vital, it should be changed to reflect the correct organisation name.

If your discoveryservice is using https (usually, it is the same protocol as your CRM), the entry HttpsDiscovery needs to be set to "true".

You can then launch the setup with the prepared registry file - similar to the batch file [launch.bat \(116.00 bytes\)](#)

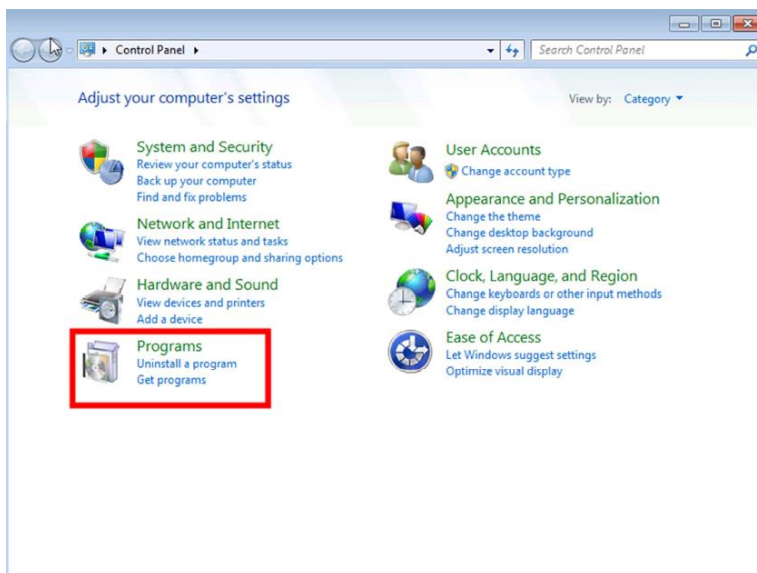
```
"[DocumentsCorePackInstallFolderAndFile]" /V"/qb /lvx* C:\instlog.txt
UAIREGFILE=[RegFileLocation]\uai-template.reg"
```

The tags [DocumentsCorePackInstallFolderAndFile] need to point to the correct installation source folder and filename.

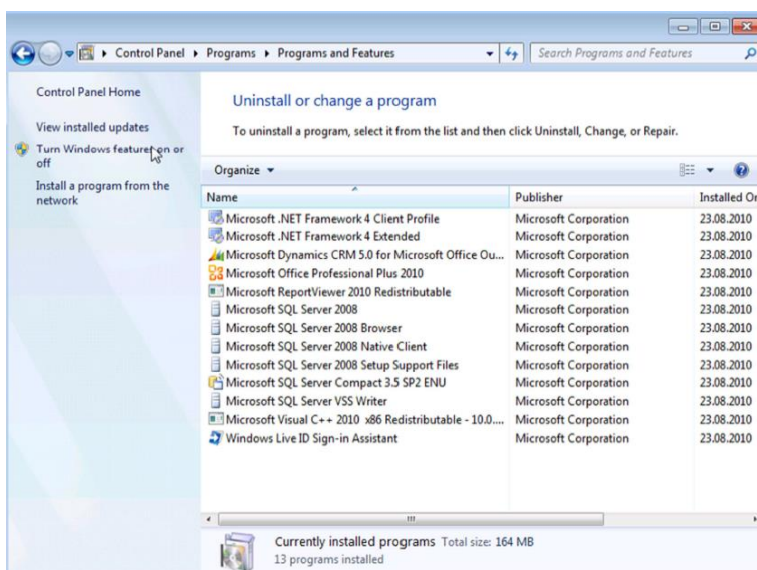
[RegFileLocation] needs to point to the folder of the prepared registryfile. If you changed the registry filename, you need to adapt this change in the command as well.

8 Uninstall Client Component

To uninstall the DocumentsCorePack Server for MS CRM 2011 select "Programs" in Control Panel.



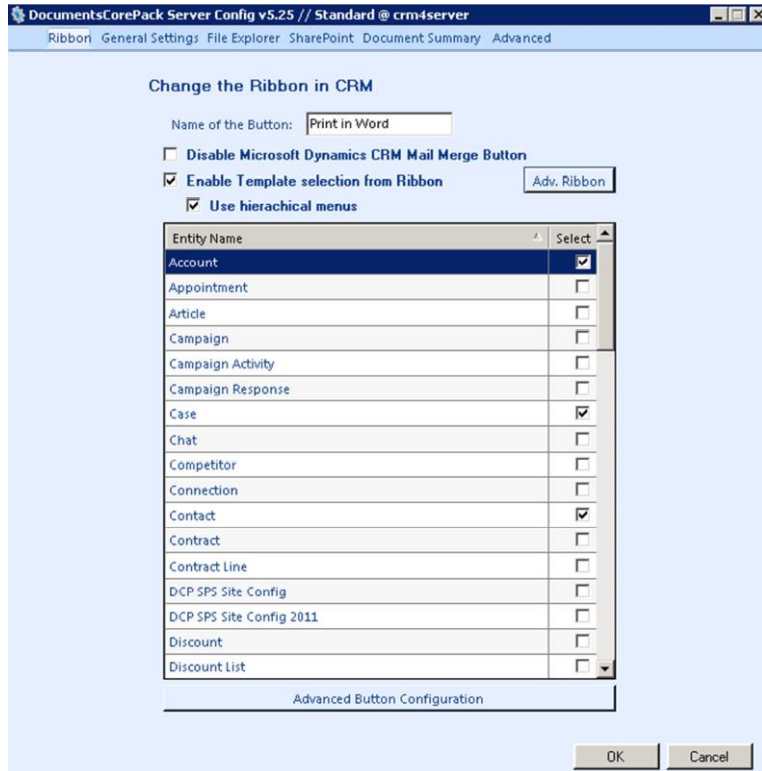
Search for the DocumentsCorePack Client CRM 2011 in "Uninstall or change a program" to uninstall the DocumentsCorePack Client. Follow the instructions to uninstall the DocumentsCorePack Client.



9 Configuration

The DocumentsCorePack Server for MS CRM 2011 Configuration allows you to specify the DocumentsCorePack settings (e.g. configure on which entities you want to see the „Print in Word“-Button etc.) After Starting the DocumentsCorePack Server Configuration you'll see following window.

9.1 Ribbon



Entity Name	Select
Account	<input checked="" type="checkbox"/>
Appointment	<input type="checkbox"/>
Article	<input type="checkbox"/>
Campaign	<input type="checkbox"/>
Campaign Activity	<input type="checkbox"/>
Campaign Response	<input type="checkbox"/>
Case	<input checked="" type="checkbox"/>
Chat	<input type="checkbox"/>
Competitor	<input type="checkbox"/>
Connection	<input type="checkbox"/>
Contact	<input checked="" type="checkbox"/>
Contract	<input type="checkbox"/>
Contract Line	<input type="checkbox"/>
DCP SPS Site Config	<input type="checkbox"/>
DCP SPS Site Config 2011	<input type="checkbox"/>
Discount	<input type="checkbox"/>
Discount List	<input type="checkbox"/>

Here you can configure the entities where you want to see the Print In Word Button and you can specify the text of the button. Furthermore, you are able to choose to disable the CRM Integrated Mail Merge functionality: This means that the permission to use the CRM Integrated Mail Merge is removed from every security role.

Please note that not every security role, e.g. System Administrator, can be modified. Users with these roles can still use the CRM Integrated Mail Merge.

The "Enable Template selection from Ribbon" and the "Use hierarchical menus" will modify and convert the existing "Print in Word" button to a split button in CRM.

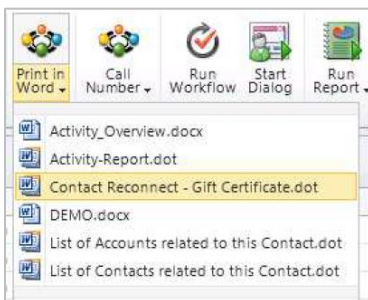


The top of the button will start the merge as usual and the template selection has to be done using the "Open Template" dialog.

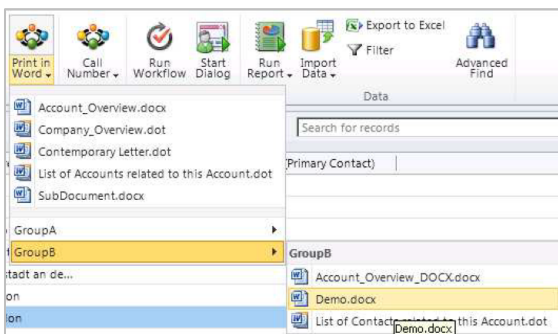


The bottom part of the button contains the new functionality and will drop down a list with all available templates for this entity.

If you have only checked the "Enable Template selection from Ribbon", the drop down list will show you all available templates, even if the templates are stored in different groups.

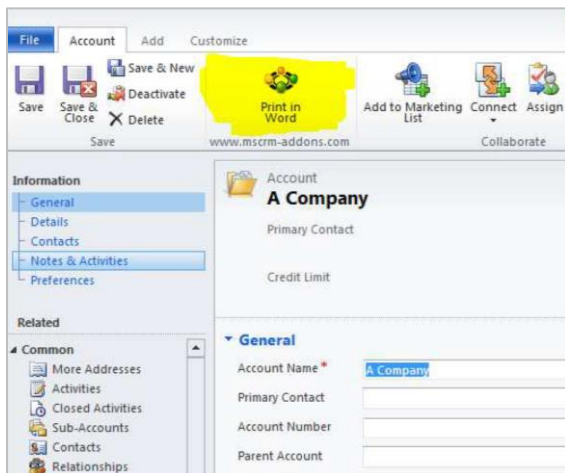
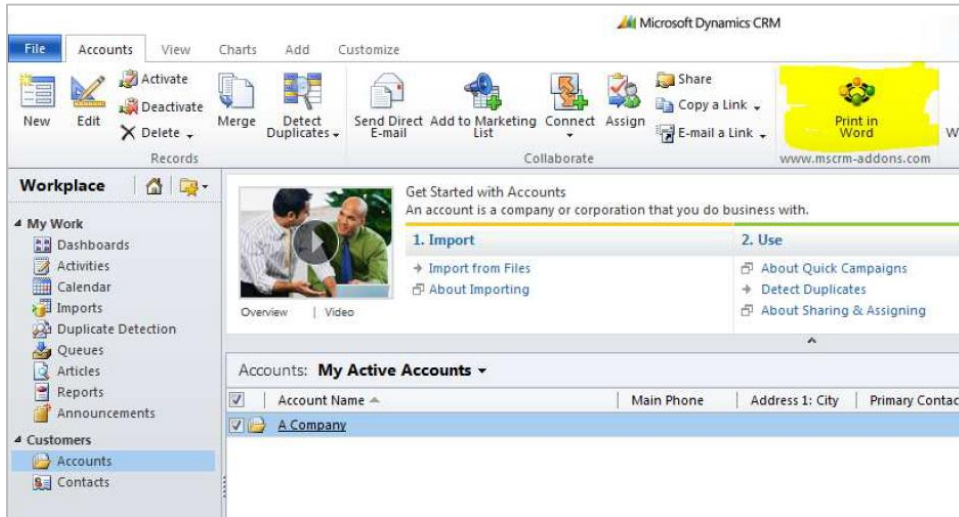


If the "Use hierarchical menus" is configured, also the groups including the templates will be displayed in a hierarchical way. The templates those are stored in the "General" group will be displayed on top of the list.

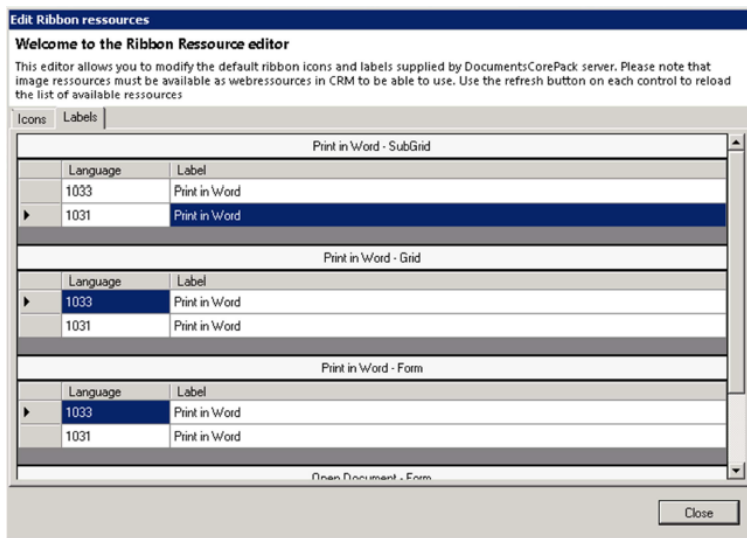


After you have applied the settings, you'll see the Print in Word Button on the selected entities on:

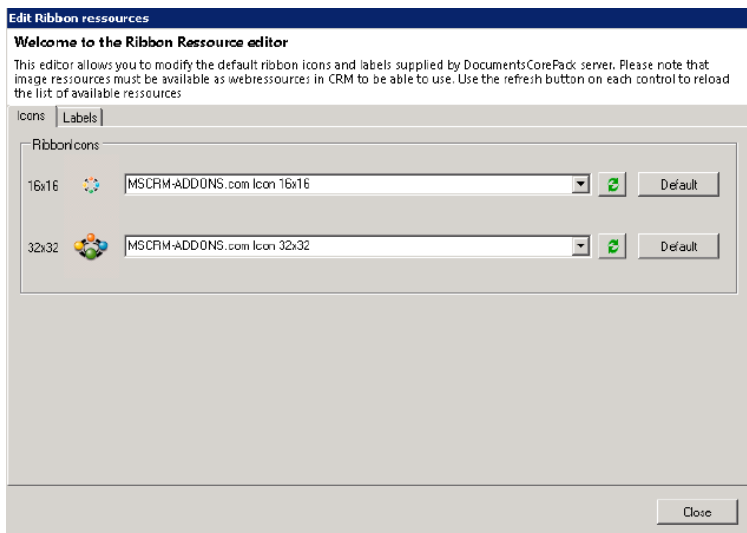
- The entity grid:



The "Adv. Ribbon" configuration will allow you configure different names for the Print inWord button, also for different languages. Furthermore, you are also be able to define specific icons for the buttons in CRM.

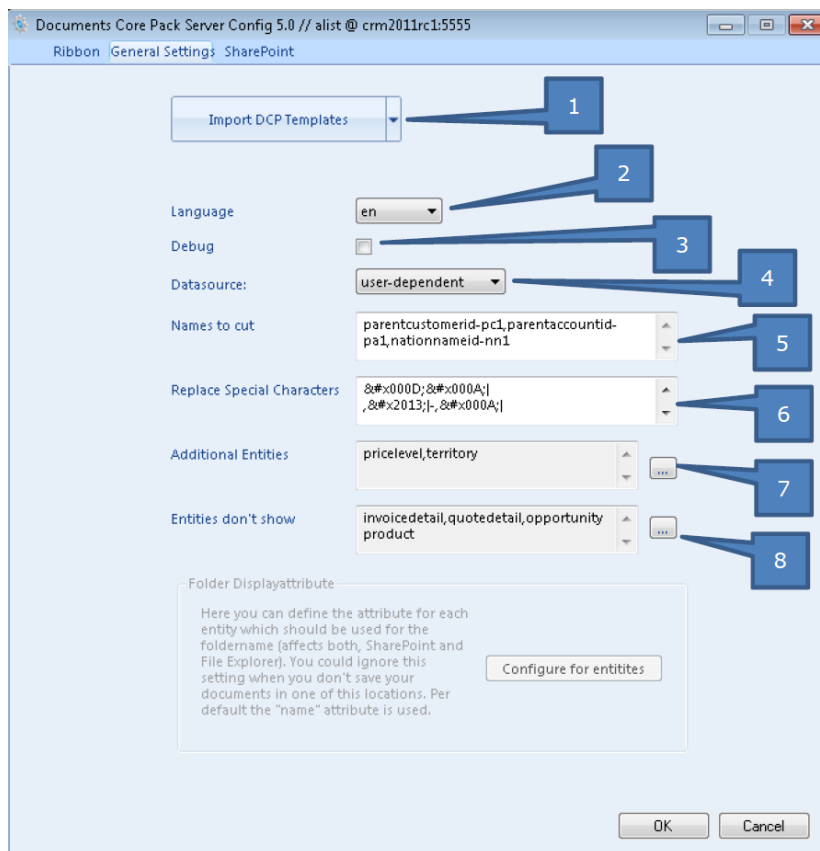


Within this dialog you can set the different labels for the different locations (Grid, Form...) of the "Print in Word" button for the different languages



The icons tab of this configuration window gives you the possibility to change the icons of the buttons. The icons are CRM web resource you can upload some by yourself with the standard CRM functionality.

9.2 General Settings



1. Import Templates

Please refer to chapter [10.2](#).

2. Language

You can choose the language from the dropdown-box. Languages are listed in language code (en for English, de for German).

To add another language, please see chapter [10](#).

3. Debug

Leave unchecked; This option is used by our support to simplify bug fixing.

4. Data Source

Here you can select the type of data source. This contains cached information from the CRM, which can be used with the DocumentsCorePack Client.

5. Names to Cut

For detailed information see chapter [11](#).

6. Replace Special Characters

treated special exceptions or certain coding problems with CRM

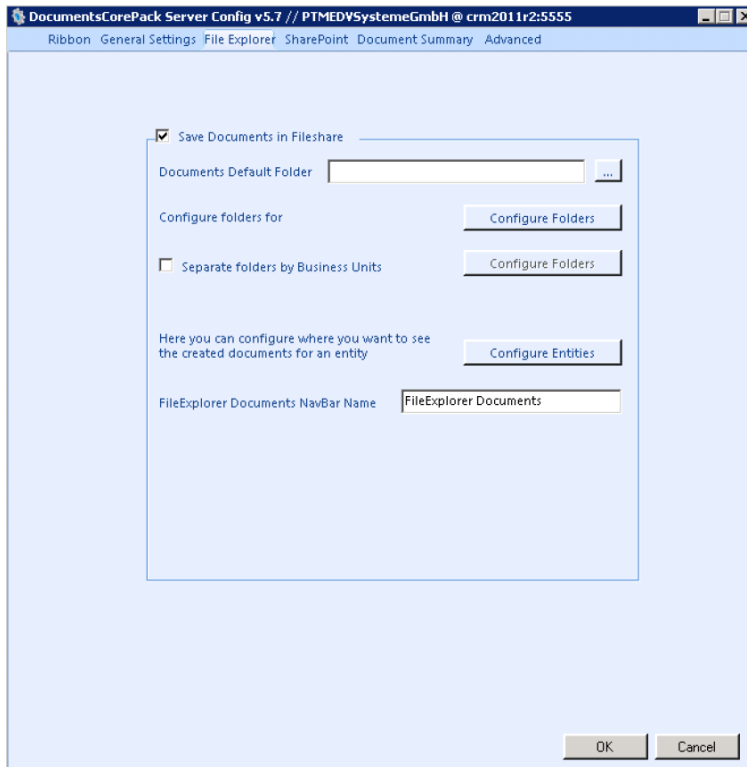
7. Additional Entities

DocumentsCorePack only shows customizable entities by default. If you want to use other entities for DocumentsCorePack, you have to define them in here.

8. Entities don't show

Entities that are registered here will be hidden and are not useable/visible with/in DocumentsCorePack.

9.3 File Explorer

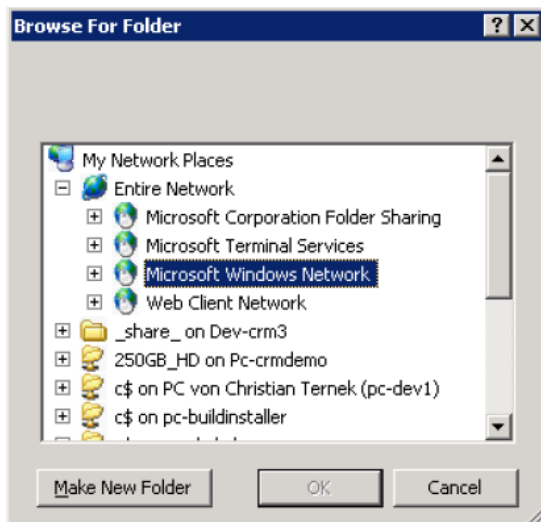


Here you can enable the File Explorer Integration. Documents generated through DocumentsCorePack Client will be saved on the specified file share.

1) Save Documents in fileshare

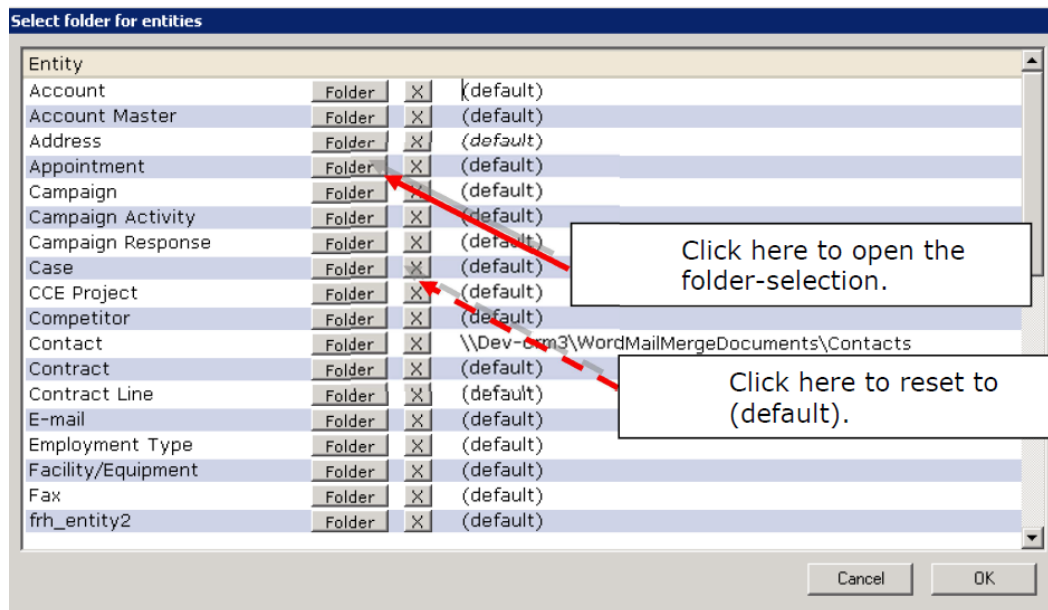
Check here to activate; Notice: It's not possible to use both, SharePoint / File Explorer. When activating File Explorer, SharePoint will be deactivated automatically.

- 2) **Documents** **Default** **Folder**
 Specifies the file share to which the created documents should be saved to. You can choose/create a folder with a click on [...].

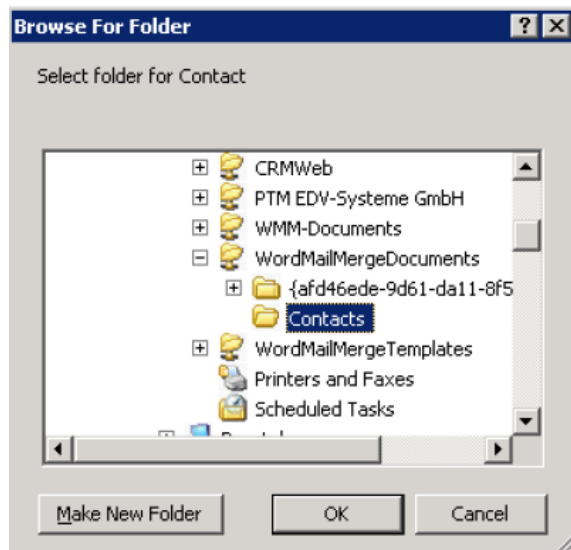


3) Configure Folder for entities

Here you can specify a specific folder for each entity.



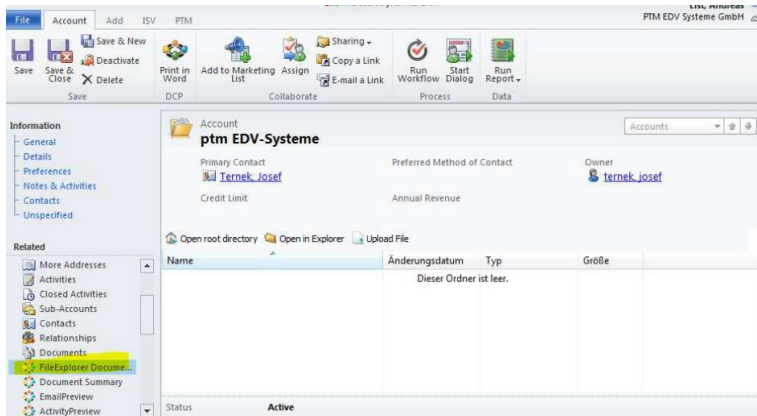
Click on [Folder] to open the selection (e.g. contact).



All documents for the entity account will be saved to this folder afterwards. If you set this option to (default) documents will be saved to the root of the file share.

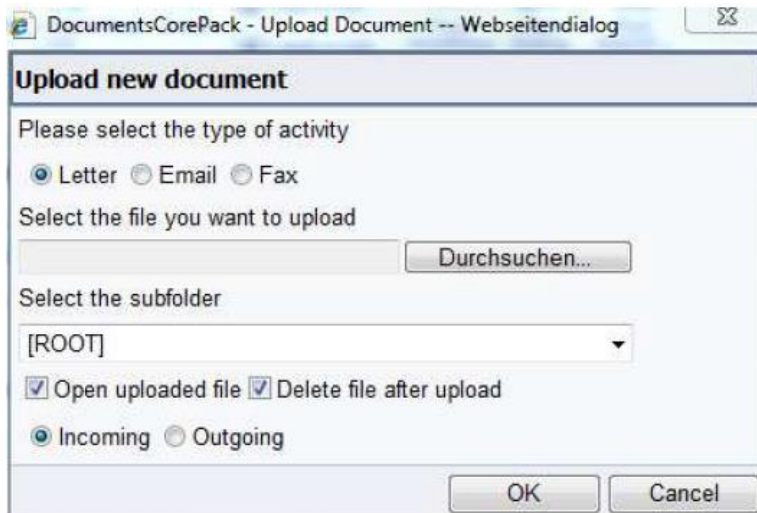
4) Configure Entities

Here you could define on which entities you want to see the "File Explorer Documents". This will be the default name of the navigation item within CRM. You could change this name with the "File Explorer Documents NavBar Name" setting.

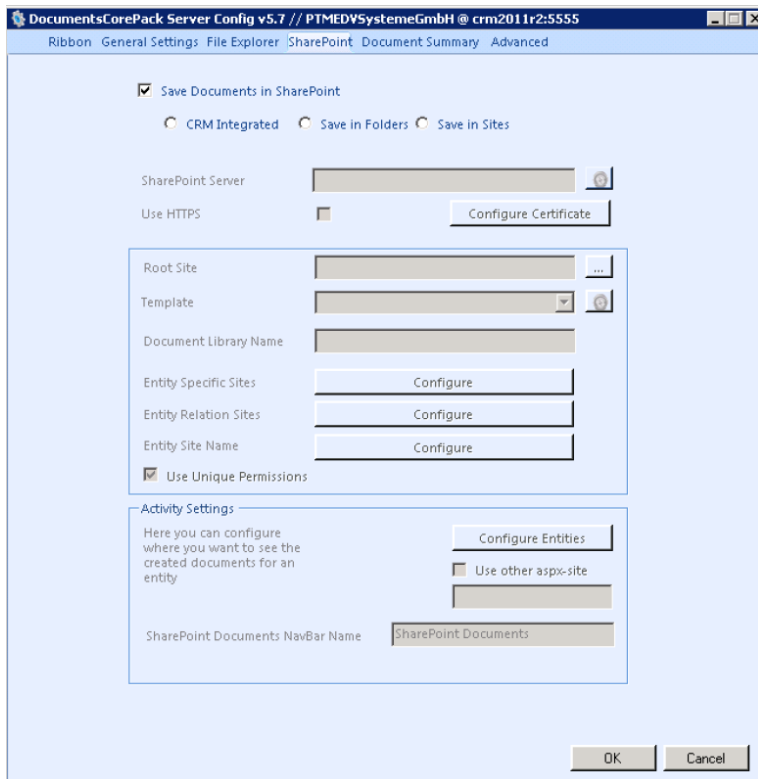


You have a toolbar with three simple options available

1. "Open root directory": If you have a subfolder structure within this folder, you can navigate through the folders. With a click on this button, the root folder will be opened again.
2. "Open in Explorer": This will open the directory direct in a Windows Explorer window.
3. "Upload File": You could choose a file and upload it to this folder. An activity will automatically be created.



9.4 SharePoint

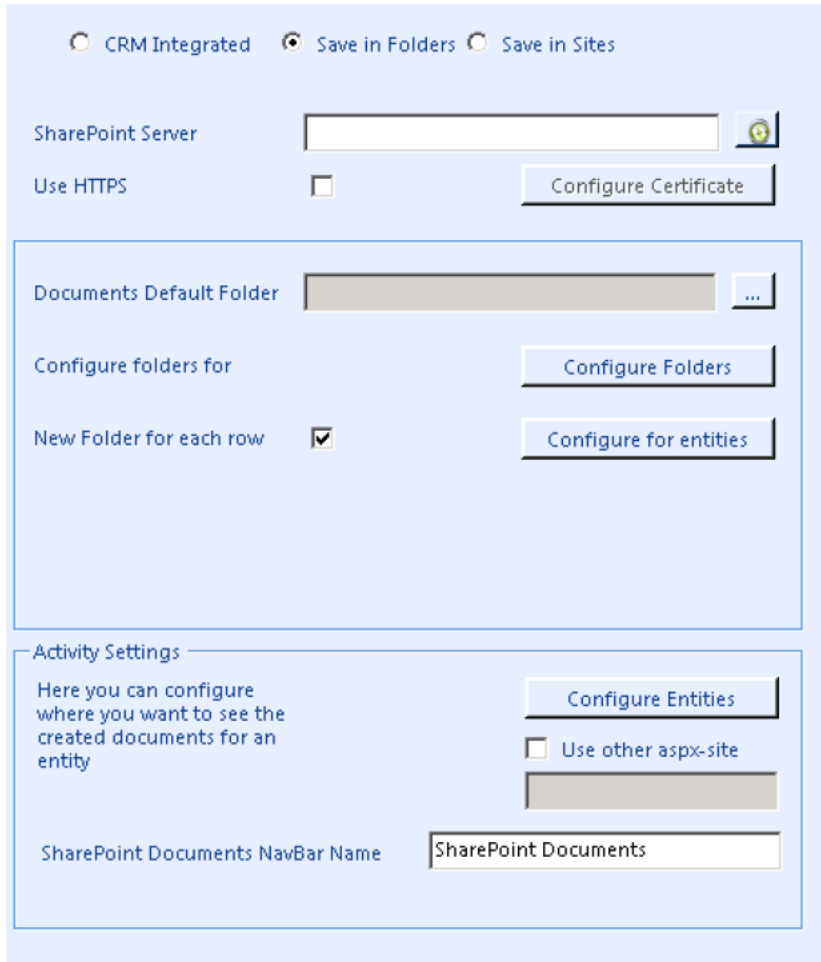


You can decide between three SharePoint integration options:

- 1. CRM Integrated:** You have to configure the SharePoint integration within CRM to use this integration. When enabled, the documents generated via the DocumentsCorePack Client will be saved in the CRM specified SharePoint location for each record.
- 2. Save in folders:** A new **folder** will be created for each record.
- 3. Save in Sites:** A new **site** will be created for each record.

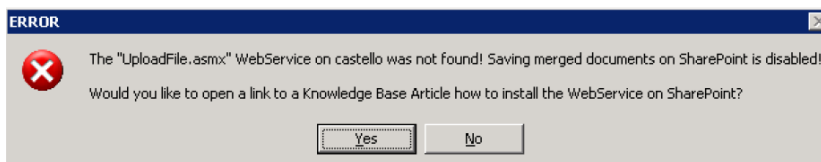
9.4.1 Save documents to SharePoint settings – Folders

Here it's possible to define how the documents should be saved to the SharePoint Folders. You have to select "Save in Folders".



1) SharePoint Server

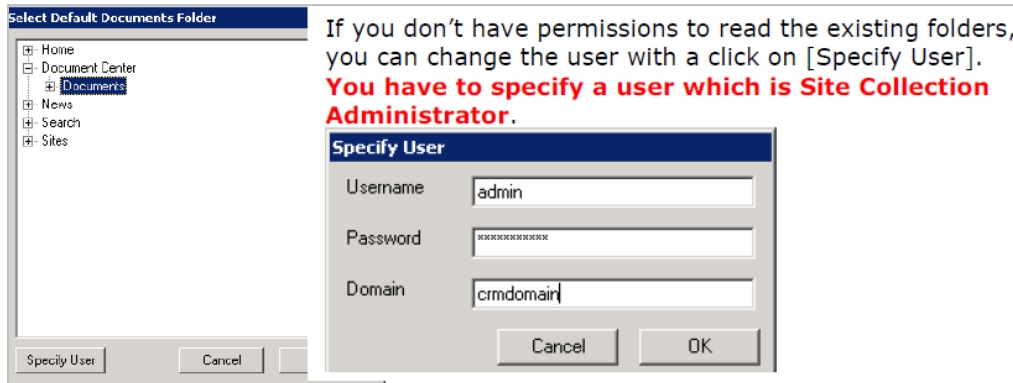
Please enter the URL to the SharePoint Server. With a click on the refresh button you could check if the WebService is installed. Notice: The DocumentsCorePack – services have to be installed on the mSharePoint to be activated. You'll get following notification if the necessary services could not be found:



In this case you'll have to install the DCP SharePoint services on the SharePoint - see Knowledge Base-article:
<http://support.mscrm-addons.com/default.aspx?KB=10272>

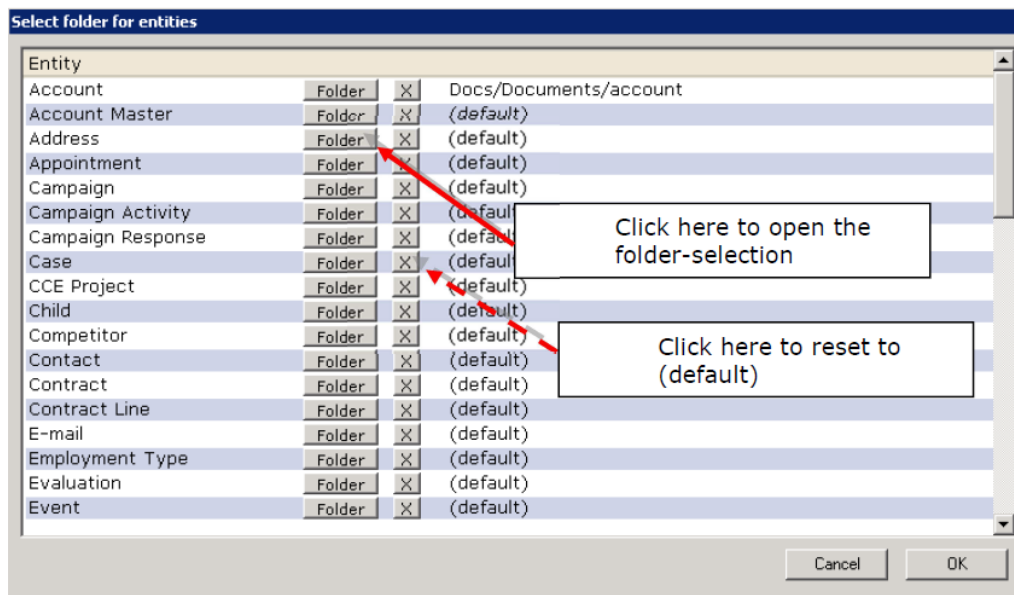
2) Documents Default Folder

Specifies the default folder for documents saved with DocumentsCorePack. You can choose the folder with a click on [...].

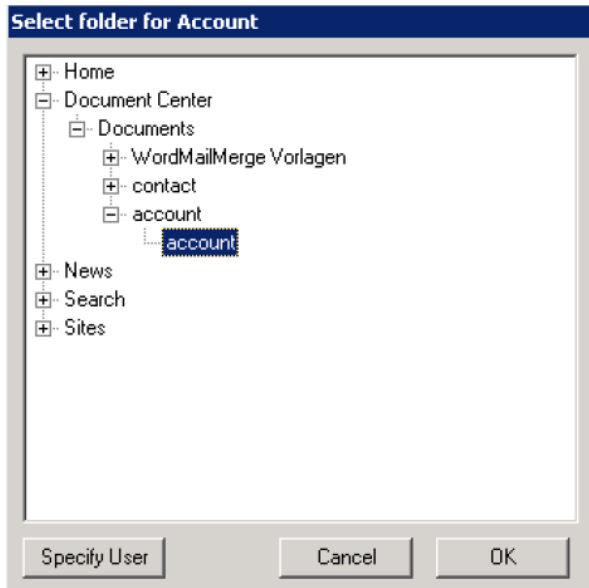


3) Configure Folder for entities

Here you can specify a specific folder for each entity.



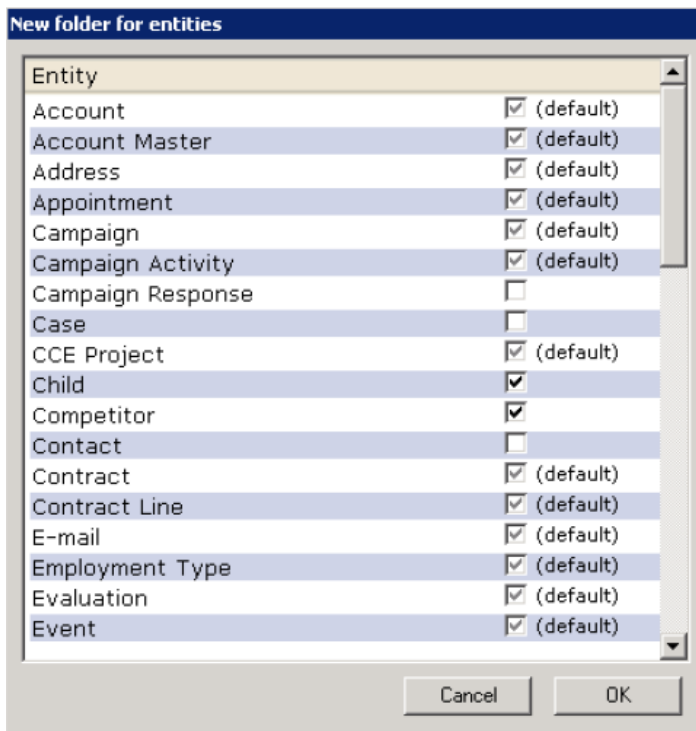
Click on [Folder] to open the selection (e.g. account).



All documents for the entity account will be saved to this folder afterwards. Set this option to (default) to use the documents default folder.

4) New Folder for each row

Here you can choose if you want to have an extra folder for each record of an entity (e.g. account, contact...). You can set this option on (default) with the checkbox. To specify this option for each entity, click on [Configure for entities].

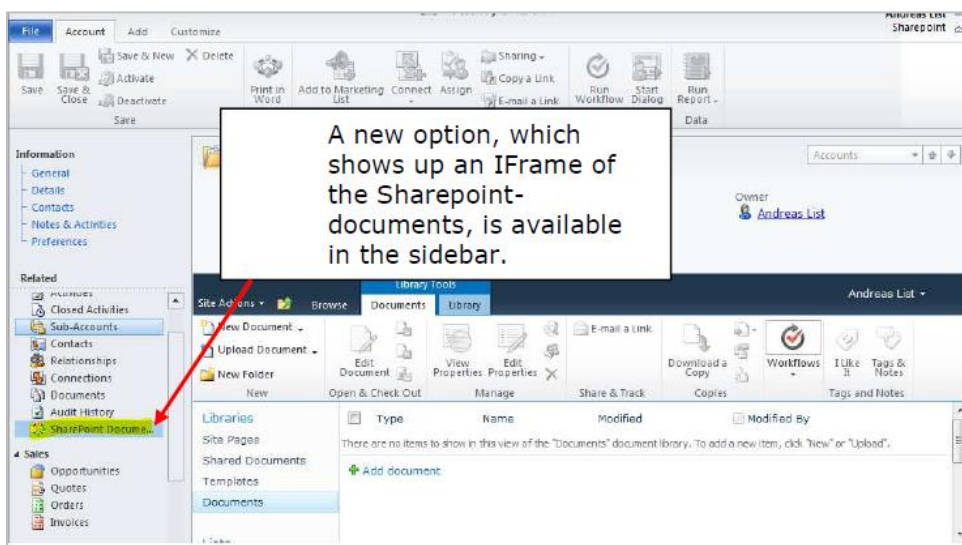


Options:

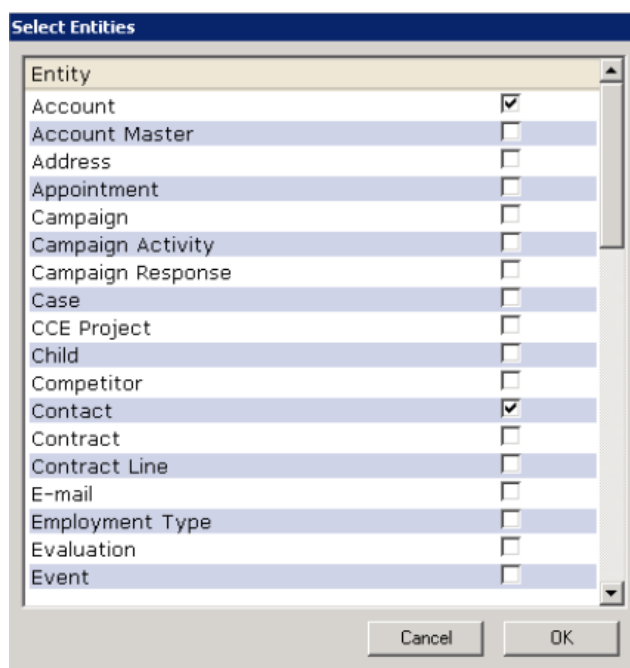
- Checked: A new folder will be created for each record.
- Unchecked: Documents saved for this entity will be saved to the folder specified in no.: 2 and 3 (see above).
- (default): overtakes the state of the "New Folder for each row"-Checkbox.

5) Visualization options

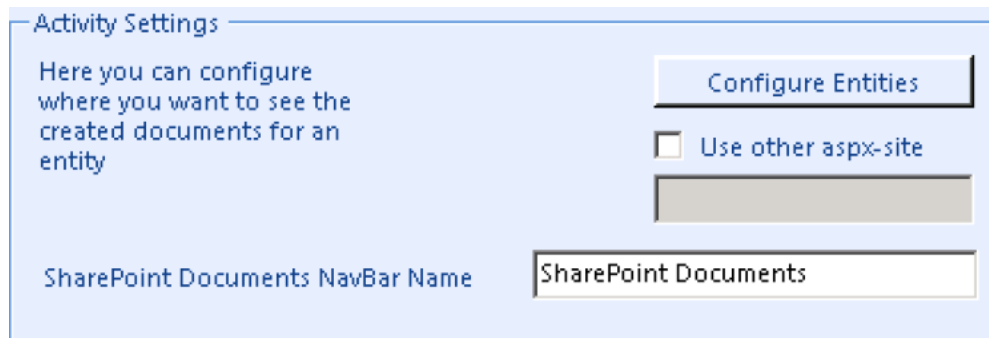
Here it's possible to choose where you want to see the created/saved documents. The documents will be shown within the entity details of the entities. A new menu option will appear in the sidebar.



You can specify the entities where this option should appear by clicking on [Configure for entities].



By default, the view "AllItems.aspx" is used to view your SharePoint documents. Use the "Use other aspx-site" setting to change the default view.

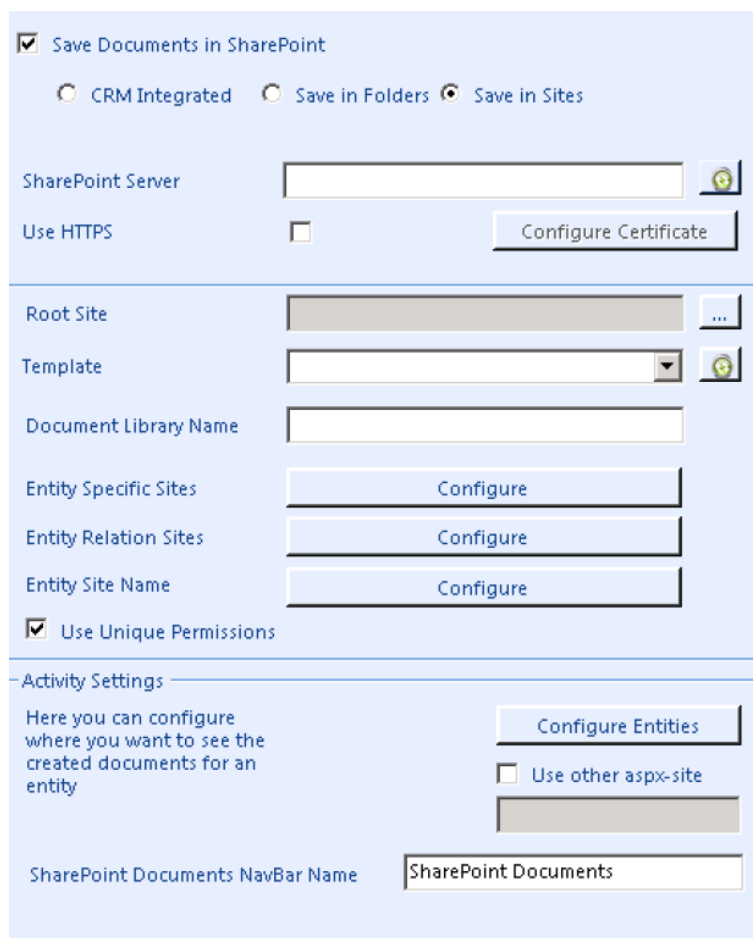


The screenshot shows the "Activity Settings" configuration panel. It includes a "Configure Entities" button, a checkbox for "Use other aspx-site" which is currently unchecked, and a text input field for "SharePoint Documents NavBar Name" containing the text "SharePoint Documents".

You can also specify the name of the navigation bar within CRM with the "SharePoint Documents NavBar Name" setting.

9.4.2 Save documents to SharePoint settings – Sites

Here it's possible to define how the documents should be saved to the SharePoint Sites. You have to select "Save in Sites".

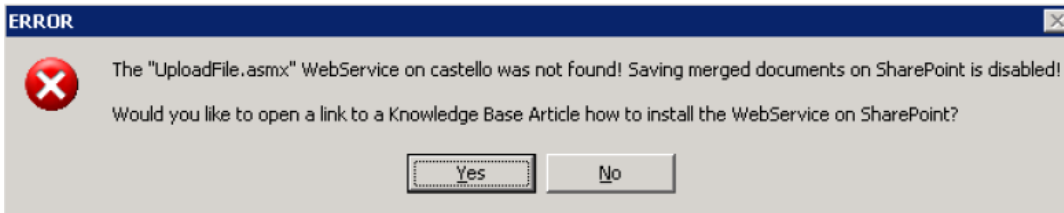


The screenshot shows the "Save Documents in SharePoint" configuration panel. It features radio buttons for "CRM Integrated", "Save in Folders", and "Save in Sites", with "Save in Sites" selected. Below these are fields for "SharePoint Server", "Use HTTPS" (unchecked), "Root Site", "Template", "Document Library Name", and "Entity Specific Sites", "Entity Relation Sites", and "Entity Site Name", each with a "Configure" button. A "Configure Certificate" button is also present. At the bottom, there is a checkbox for "Use Unique Permissions" and a section for "Activity Settings" which is identical to the one shown in the previous screenshot.

1) SharePoint Server

Please enter the URL to the SharePoint Server. With a click on the refresh button you could check if the Webservice is installed.

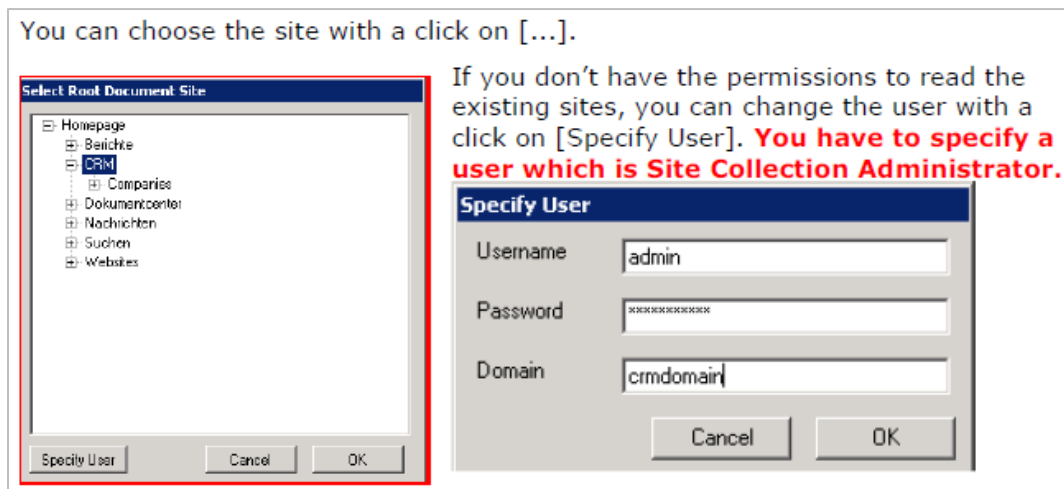
Notice: The DocumentsCorePack – services have to be installed on the SharePoint to activate. You'll get the following notification if the necessary services could not be found:



In this case, you'll have to install the DCP SharePoint services on the SharePoint. -> see Knowledge Base-article: <http://support.mscrm-addons.com/default.aspx?KB=10272>

2) Root Site

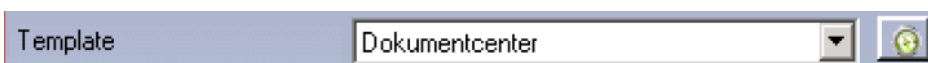
Specifies the default site for documents saved with DocumentsCorePack. You can choose the site with a click on [...].



You can select any sub site or also the SharePoint root.

3) SharePoint Template

First time round you will have to hit the refresh button to read all the SharePoint site templates. Then select a SharePoint template which must include **at least one** Document Library.



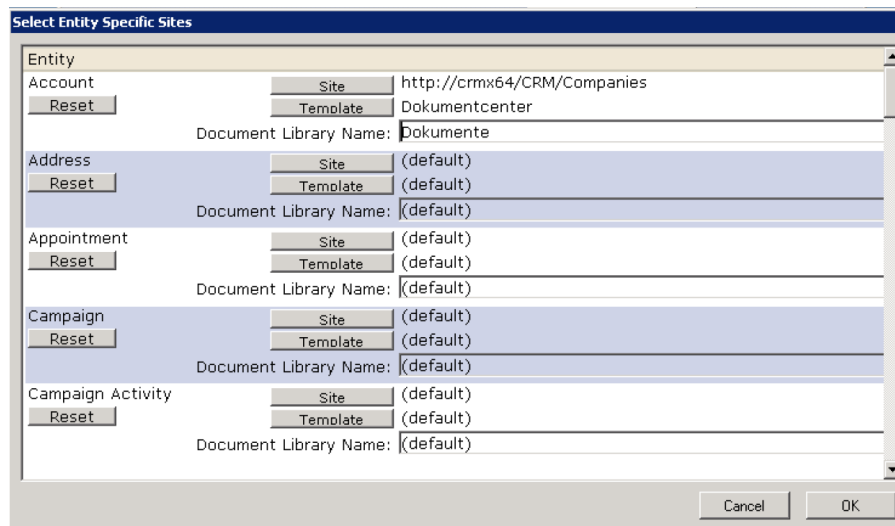
4) Document Library Name

You have to enter the name of a Document Library which exists in the SharePoint template. You selected the template in the previous step! Please verify that the name is entered correctly!

Document Library Name	Dokumente
-----------------------	-----------

5) Entity Specific Sites

Here you can configure a specific site for each entity where the sub sites for each record will be generated. You must select a site on SharePoint and a SharePoint template which must include at least one Document Library. The name of the Document Library must exist in the template you have selected.

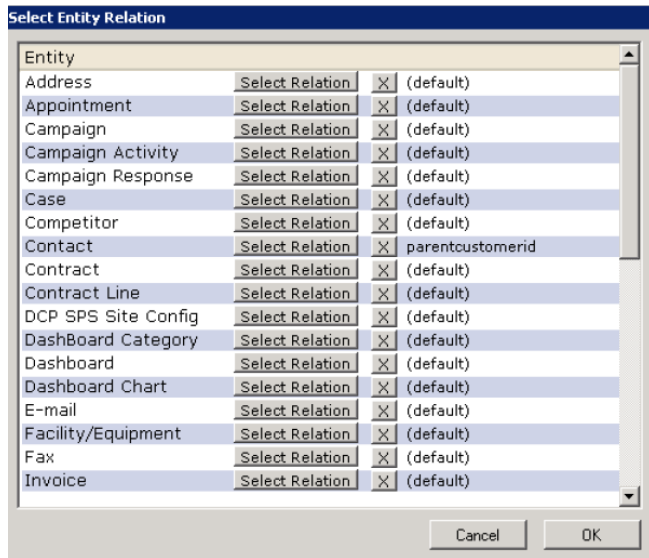


The screenshot shows a dialog box titled "Select Entity Specific Sites". It contains a list of entities with configuration options for Site, Template, and Document Library Name. The "Account" entity is highlighted in blue and has its Site set to "http://crm64/CRM/Companies", Template to "Dokumentcenter", and Document Library Name to "Dokumente". Other entities like Address, Appointment, Campaign, and Campaign Activity have their Site and Template set to "(default)" and Document Library Name to "(default)". There are "Reset" buttons for each entity and "Cancel" and "OK" buttons at the bottom.

Entity	Site	Template	Document Library Name
Account	http://crm64/CRM/Companies	Dokumentcenter	Dokumente
Address	(default)	(default)	(default)
Appointment	(default)	(default)	(default)
Campaign	(default)	(default)	(default)
Campaign Activity	(default)	(default)	(default)

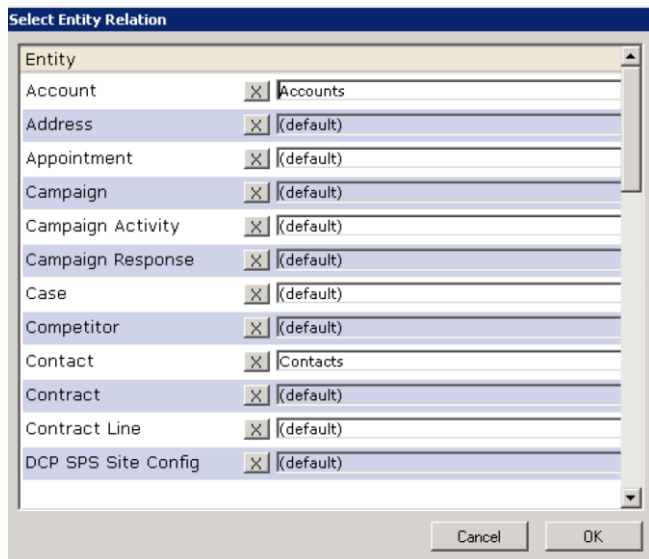
6) Entity Relation Sites

You can select a relationship to another entity in which the sites will be generated as sub sites (e.g. If all contact sites should be created under the parent customer (account), you can select the relation for a contact to the account which is the parentcustomerid. Every contact site will be created under the related account site.)



7) Entity Site Name

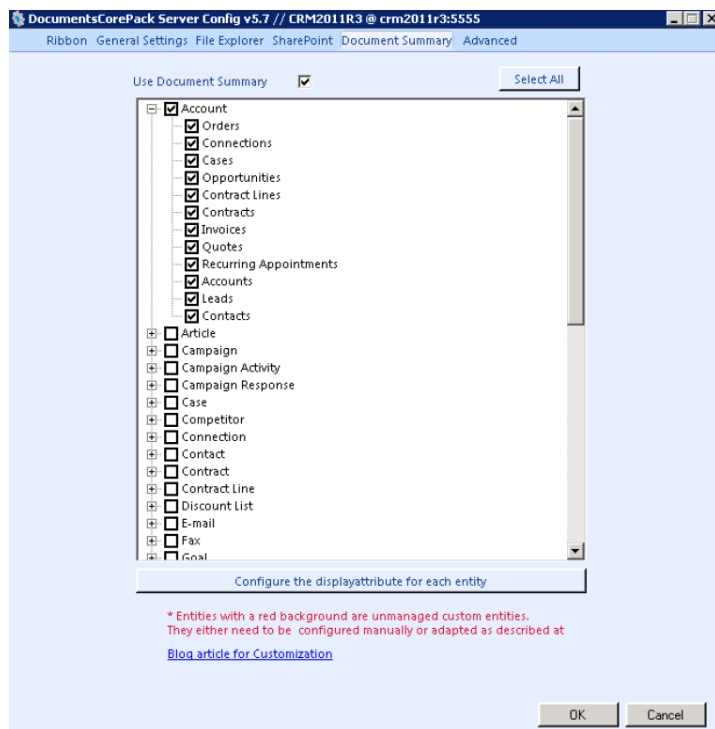
For each entity you could select a "display" name. This name will be used for the site name of each entity (e.g. When you've configured in the relation settings that the contacts will be saved under the related account, a sub site under the account site will be generated with the schema name. In this example ("contact") the contact sites will be created under this site. If you don't like this name, you could change it in the settings).



9.5 Document Summary

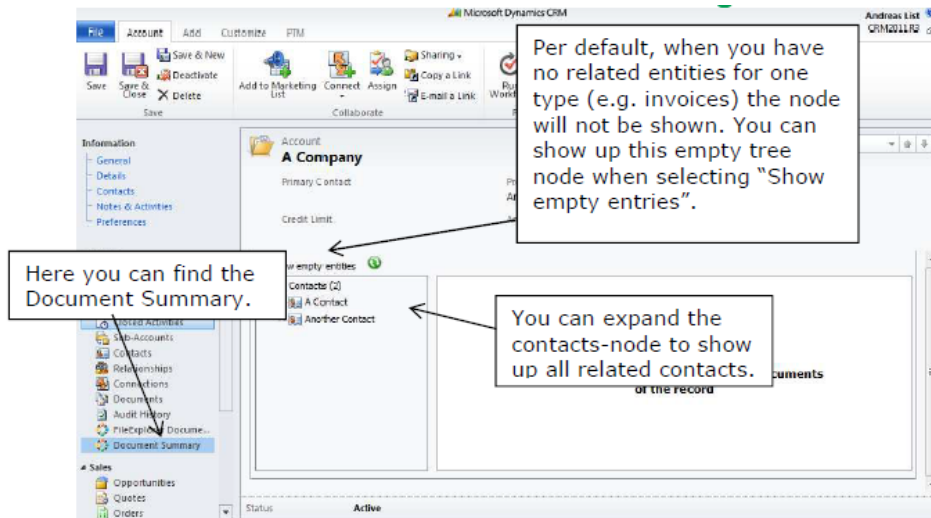
With the Document Summary you have the possibility to view the File Explorer or SharePoint Documents from related entities. You have to configure SharePoint or File Explorer before activating the Document Summary (e.g. You have an account with 5 related contacts).

Instead of opening every contact and open "File Explorer Documents" or "SharePoint Documents" of each one, you can use the Document Summary to view the documents of the contacts).

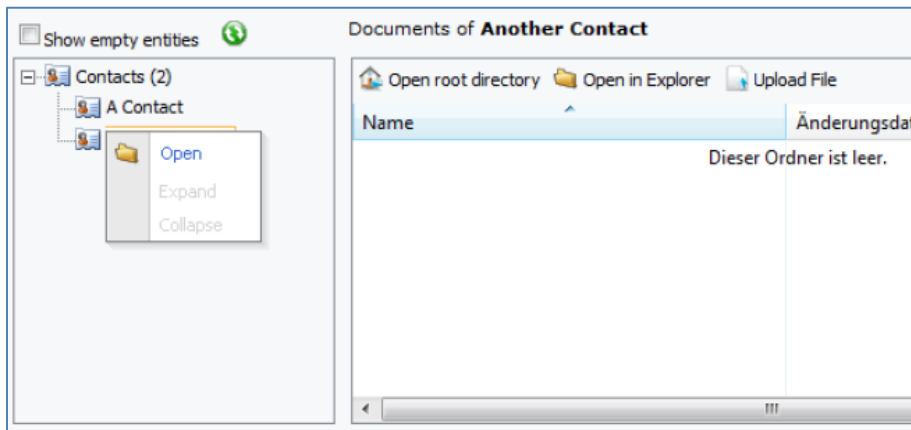


The first level of the tree indicates on which entity you want to see the Document Summary. The second level of the tree indicates which related entities you want to see. You could only select 1:n relations.

After activating the Document Summary, you'll see a new navigation item on the entities you selected in the first tree level. See next screenshot:

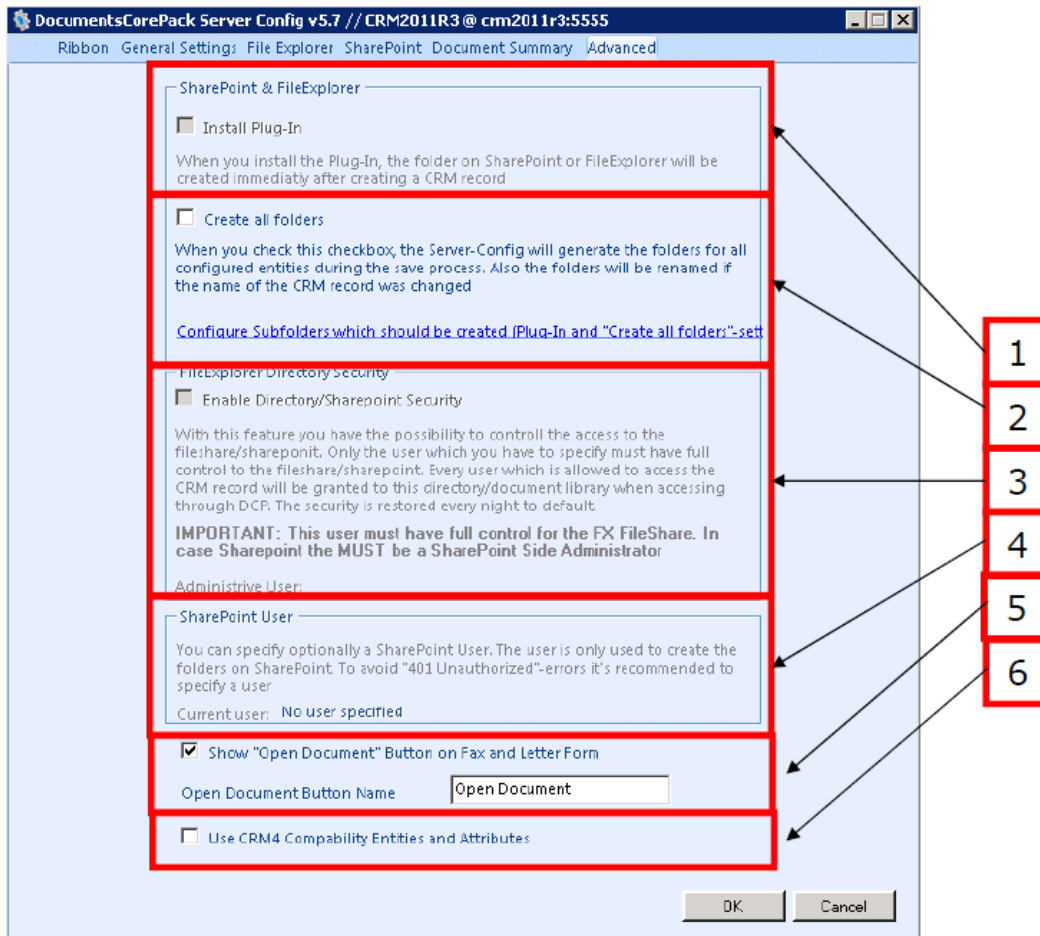


You can click on a contact to see its (File Explorer or SharePoint) documents. It basically shows the same as if opening the contact directly and click on "SharePoint Documents" or "File Explorer Documents". You also have a right click menu on each node. You can open the entity or expand/collapse the tree.



The tree is recursive. This means that you can expand the tree downwards till you don't have any related entities (e.g. Open an account, expand the contacts, expand the invoices of a contact and so on.)

9.6 Advanced Settings



1) Install Plug-In

When you install the plug-in, the folder on SharePoint or File Explorer will be created immediately after creating a CRM record.

2) Create all folders

When you check this checkbox, the Server-Config will generate the folders for all configured entities during the save process. Also, the folders will be renamed if the name of the CRM record was changed.

3) Enable Directory Security

With this feature you have the possibility to control the access to the file share. Only the user which you have to specify must have full control to the file share. Every user which is allowed to access the CRM record will be granted to this directory when accessing through DCP. The security is restored to default every night.

4) SharePoint User

You can optionally specify a SharePoint user. The user is only used to create the folders on SharePoint. To avoid "401 Unauthorized" -errors it's recommended specifying a user.

5) Show Open Document Button

When you've configured the File Explorer- or SharePoint-integration, you can specify here if you want to see an "Open Document" button on the fax and letter activities. With that button you can open the associated document if it was generated via the DocumentsCorePack Client. You could also configure the name of the button. When you enable File Explorer or SharePoint, this setting is activated by default.

6) Use CRM 4.0 Compatibility

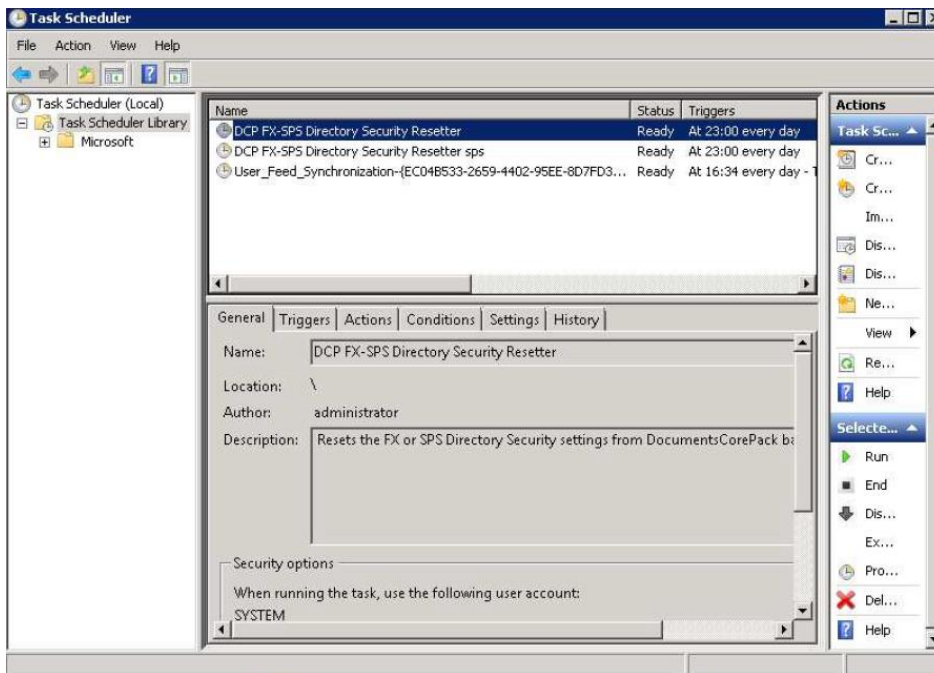
The CRM4 Compatibility mode is necessary when you migrated your organization from CRM 4.0 to CRM 2011 **and** you used File Explorer or SharePoint Integration. For the fax and letter activity the document links were saved in an attribute. When the compatibility mode is enabled, the old CRM 4.0 attributes will be used. Otherwise, the new DCP 2011 attributes will be used.

9.7 Additional steps for DocumentsCorePack Directory Security

With the Directory Security feature of DocumentsCorePack for MS CRM 2011 you can prevent users to see the files from CRM records which are not accessible for them. Users will not be able to navigate to the associated directory within the file share or SharePoint because DocumentsCorePack will overtake the security for you. In other words: When a user is not able to see the CRM record, he/she will also not be able to see the documents.

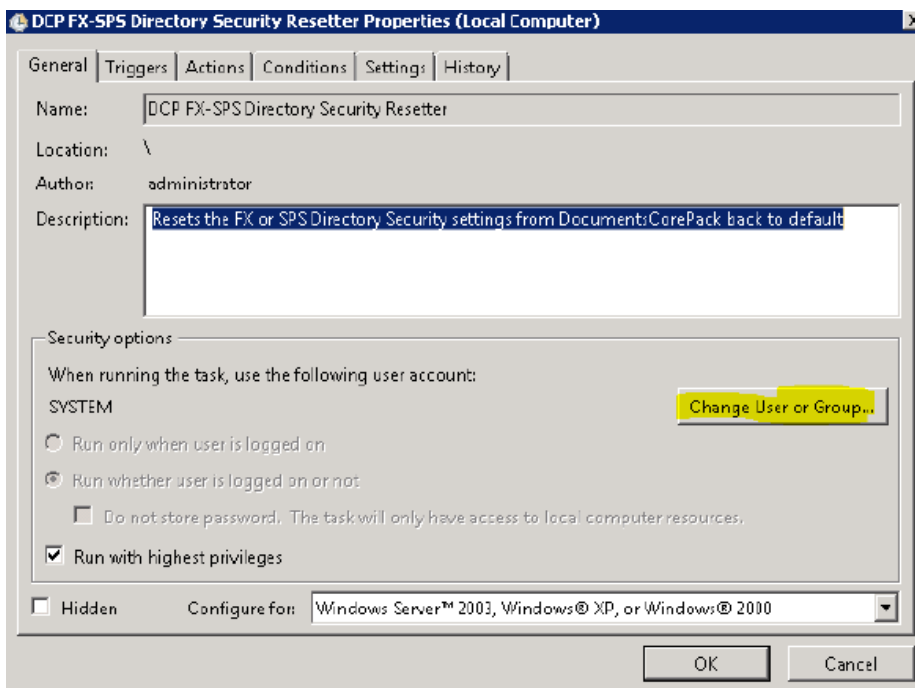
Furthermore, you have to do additional steps for the Directory Security. Each time a user accesses the documents through DocumentsCorePack, the user will be granted for this specific directory. As it's possible that user privileges are changed, the user will not have permissions to see the CRM record anymore, but the permissions are already granted.

That's the reason why DocumentsCorePack resets the permission every night at 11pm (server time). For this, you have to specify a user under which the task should run. You have to do this manually. Please open the Windows Task Scheduler.



You'll see two tasks, "DCP FX-SPS Directory Security Resetter" which is for FileExplorer and "DCP FX-SPS Directory Security Resetter sps" which resets the SharePoint Directory Security. Per default, the tasks are running under the SYSTEM account that has not enough privileges to connect to CRM.

You need to specify a user who is able to read allorganizations. To do so, double-click on the tasks and click on "Change User or Group". Specify a user who is able to connect to CRM.



Now the directory security will be reset every night to the default permissions.

10 How to install DocumentsCorePack in an IFD/Claims-based environment

In this chapter we will walk you through the required steps to install DocumentsCorePack in an IFD/Claims-based-environment.

You need to have the following downloads present to successfully setup the addon:

- IFD-Tool -> [Download Link](#) you need to have a login on our web site
- For installing DocumentsCorePack you need at least version 5.18 from our [Download Section](#)

Before you start installing, MS CRM is required to be working correctly in IFD/Claims-Mode, including your ADFS, which should be installed correctly and configured to work with MS CRM.

More details on how to configure MSCRM for IFD/Claims can be found in the Microsoft Guide "Configuring Claims-based Authentication for Microsoft Dynamics CRM 2011" [Download](#)

The following system configuration is the basis for our guide. Your setup will differ in these URLs, make sure you are replacing the URLs with your own URLs when following the guide.

Internal Url used to access Microsoft Dynamics CRM:
`https://internalcrm.rc1ifd.ptm-edv.at`

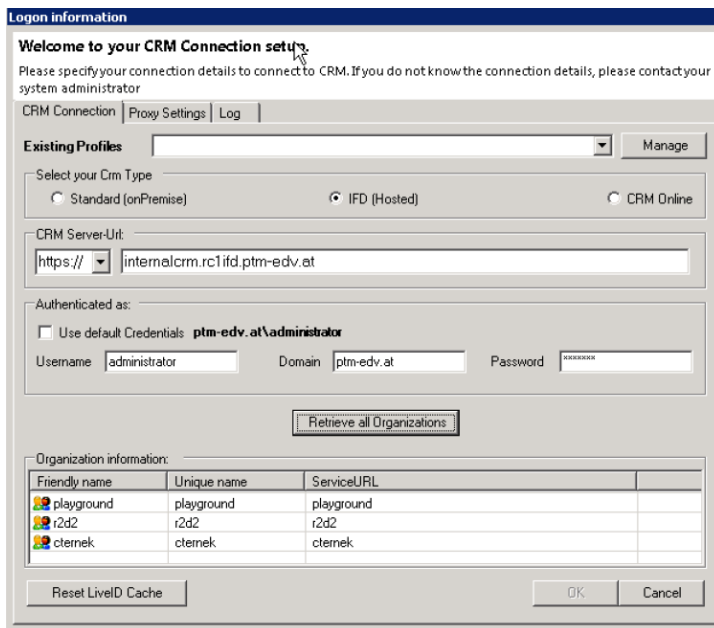
External Url used to access Microsoft Dynamics CRM:
`https://[orgname].rc1ifd.ptm-edv.at`

AD FS Server: `https://win2008domain.ptm-edv.at`

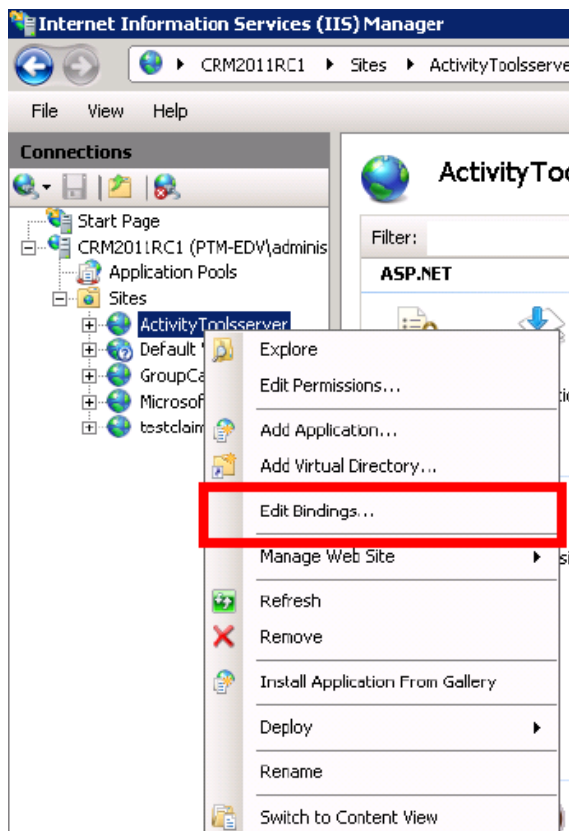
The Addon itself also requires a dns name:
`https://documentscorepackserver.rc1ifd.ptm-edv.at`

Basic installation/configuration of our addon:

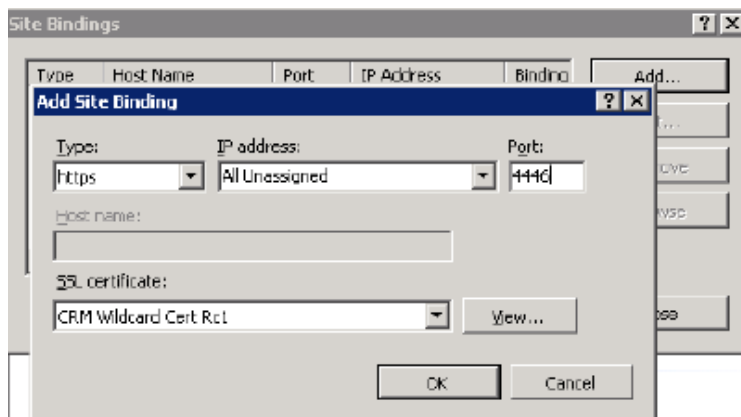
1. Install the addon on the CRM Server.
2. You will be asked for the Logon Informations. Fill in the internal IFD name of your CRM. In our case it is `internalcrm.rc1ifd.ptm-edv.at` select the organization on which you want to install the addon and click on OK.



3. After the installation is finished you have to open the IIS (inetmgr.exe) and go to the Sites -> the Addon WebSite. Right click the DocumentsCorePackserver - WebSite and select "Edit Bindings...".



On the bindings click on "Add..." and select the type "https" in the "Add Site Binding". You also have to specify the port. In our example we use 4446.



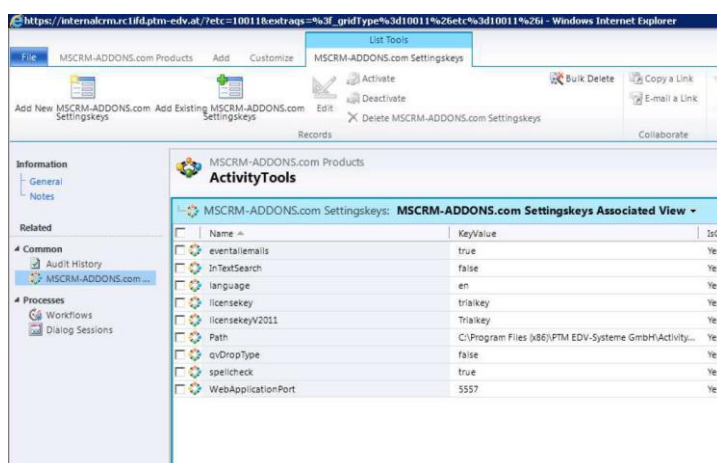
With that, we made the web site available for https. Click on OK.

4. Reselect the addon website and double click on the "Authentication" item on the right side details pane. Verify that the options "Anonymous" and "ASP.Net Impersonation" settings are enabled.

5. The addon Url needs to be added to your DNS Server. Your DNS-servers have to resolve the documentscorepackserver.[your-domain] names correctly. That means that they should resolve it with the same IP address as your CRM Server has. If you have an external DNS, make sure that both, the external and the internal DNS, are able to resolve the URL.

6. Extract the IFD-Tool (zip-file) that you downloaded before and execute the IFDSetupWizard.exe. Follow the steps in the IFD Setup carefully.

7. Open your CRM in the Internet Explorer and go to "Settings" -> "MSCRMADDONS.com Products" -> Open the Addon -> in the MSCRM-ADDONS.com Products from select the MSCRM-ADDONS.com Settingskeys and search for the "WebApplicationPort" entry.



8. Open the WebApplicationPort and replace the existing Key/Value with the following: [httpsPort]|[httpPort]|[claimsbased]|[addonname]|[debugging]; e.g.: 4446|5557|true|activitytoolserver|false

We have finished the configuration of the CRM Part and now need to **configure the ADFS**.

1. Please logon your AD FS Server and start AD FS 2.0 Management.
2. On the actions menu located in the right column, click "Add Relying Party Trust".
3. In the "Add Relying Party Trust"-wizard, click "Start"
4. On the "Select Data Source" page, click "Import data about the relying part published online or on a local network" and then type in the URL to locate the "federationmetadata.xml" file.

This federation metadata is created with the IFD-tool on the CRM server. For example, <https://activitytoolsserver.rc1ifd.ptmedv.at:4446/FederationMetadata/200706/FederationMetadata.xml>

Type this URL in your browser and verify that no certificate-related warnings appear.

5. Click "Next".
6. On the "Specify Display Name" page, type in a display name such as DocumentsCorePack IFD, and click on "Next".
7. On the "Choose Issuance Authorization Rules" page, leave the "Permit all users to access this relying party" option selected and then click "Next".
8. On the "Ready to Add Trust" page, click "Next", and then click "Close".
9. If the "Rules Editor" appears, click on "Add Rule". Otherwise, in the "Relying Party Trusts" list, right-click the relying party object that you created, click "Edit Claims Rules" and then click "Add Rule". **Important:** Be sure that the "Issuance Transform Rules" tab is selected.
10. In the "Claim rule template" list, select the "Pass Through or Filter an Incoming Claim" template, and then click "Next".
11. Create the following rule:
 - Claim rule name: Pass Through UPN (or something descriptive)
 - Add the following mapping:
 - i. Incoming claim type: UPN
 - ii. Pass through all claim values
12. Click "Finish".

13. In the "Rules Editor", click "Add Rule" and in the "Claim rule template" list select the "Pass Through or Filter an Incoming Claim" template. Then click "Next":

- Claim rule name: Pass Through Primary SID (or something descriptive)
- Add the following mapping:

- i. Incoming claim type: Primary SID
- ii. Pass through all claim values

14. Click Finish.

15. In the "Rules Editor", click "Add Rule".

16. In the "Claim rule template" list, select the "Transform an Incoming Claim" template and then click "Next".

17. Create the following rule:

- Claim rule name: Transform Windows Account Name to Name (or something descriptive)
- Add the following mapping:

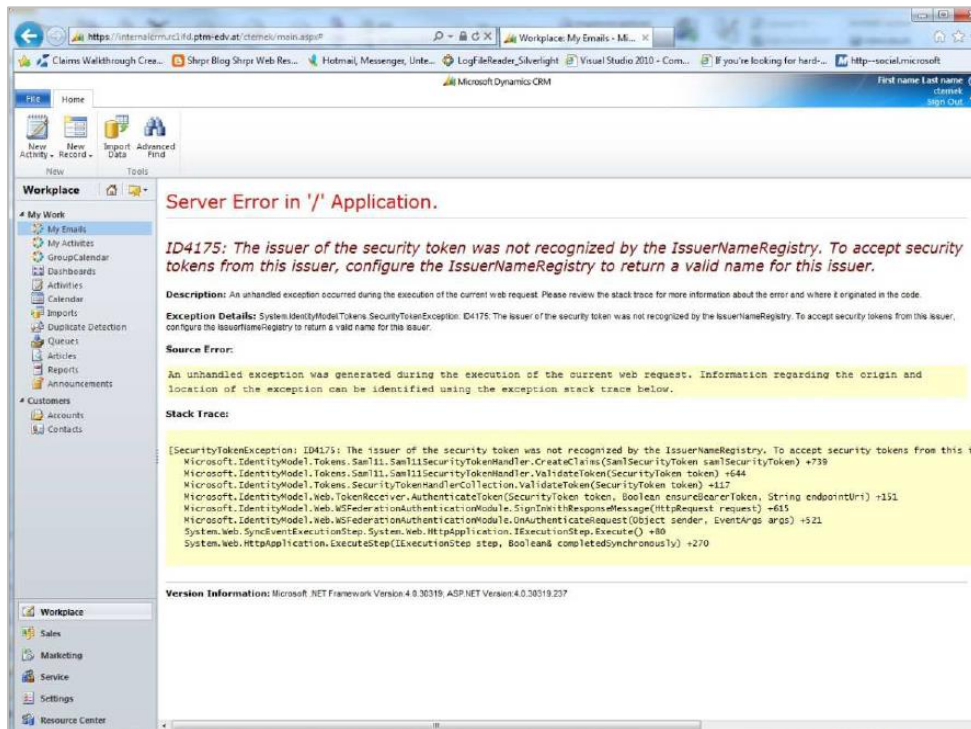
- i. Incoming claim type: Windows account name
- ii. Outgoing claim type: Name
- iii. Pass through all claim values

18. Click "Finish" and when you have created all three rules, click on "OK" to close the "Rules Editor".

You have finished the configuration and you should be able to use the Addon in your IFD/Claims Environment now.

Troubleshooting

If you see the following error, there may be two reasons for this:



Reason 1:

This indicates you are using a wrong certificate for the ADFS signing. Make sure the thumbprint in the web.config matches the one the token signing certificate in ADFS.

```
<issuerNameRegistry
type="Microsoft.IdentityModel.Tokens.ConfigurationBasedIssuerNameRegistry,
Microsoft.IdentityModel, Version=3.5.0.0, Culture=neutral,
PublicKeyToken=31bf3856ad364e35">
  <trustedIssuers>
    <add thumbprint="37a59abae1a394ffd8f0fd750c2e38e98069e349"
name="http://win2008domain.ptm-edv.at/adfs/services/trust" />
  </trustedIssuers>
</issuerNameRegistry>
```

Reason 2:

This error could also indicate access rights problems with the certificates private key (Mainly an issue for self-signed certificates).

Open your certificate store on the server (MMC, add certificate snapin for local computer) and find your HTTPS certificate. In the context menu, under all tasks select the "manage private keys" option and grant access to everyone.

Checklist for general troubleshooting:

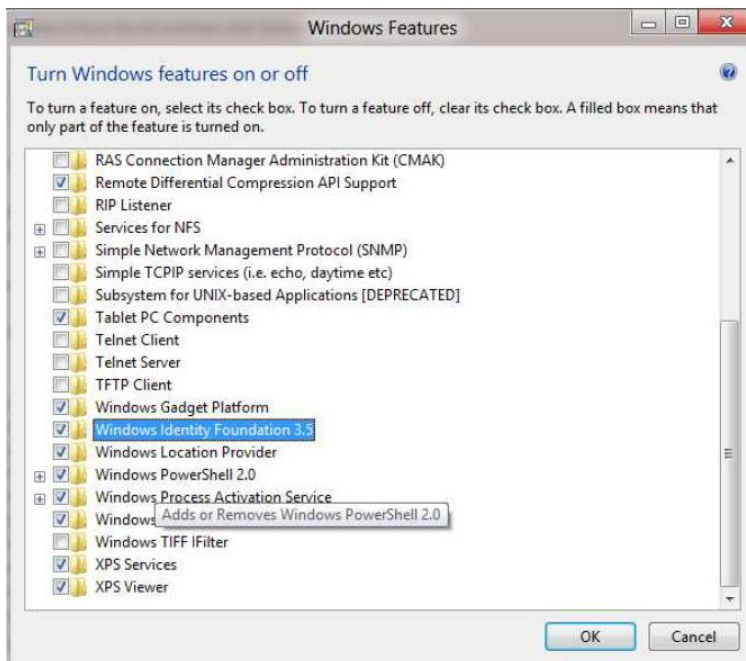
- Is the Setting WebApplicationPort still intact
- Are there any not http/https bindings in CRM
- Are there any not http/https bindings in the products website
- Is the DNS correctly resolving the products link
- Has the ConnectionProfile been created with IFD as connection type.

11 Windows 8 WIF Framework installation (WindowsIdentityFoundation)

Windows 8 has the WIF Framework built-in. Therefore, our installers will fail for now trying to update the WIF on windows 8 clients.

To activate WIF on Windows 8 run Control Panel > Programs and Features > turn Windows Features on or off.

Then check the Windows Identity Foundation 3.5 check box in the Windows Features dialogue box and click OK:



12 Documents Core Pack Templates

DocumentsCorePack templates are predefined Word-templates which have some email merge fields in it. You can define several templates for each MS CRM entity (e.g. account, contact,...).

For example: You created an "Account reconnect"-template that should be used to send information to accounts. Once created and stored, every MS CRM user can generate "Account reconnect"-letters based on this template.

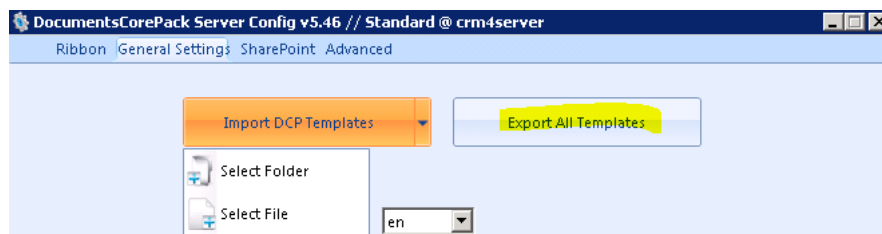
NOTE: Some basic templates like "Account Reconnect", "Gift Certificate" for contacts and "quote" – templates come with the installation of DocumentsCorePack.

12.1 How to create DocumentsCorePack Templates

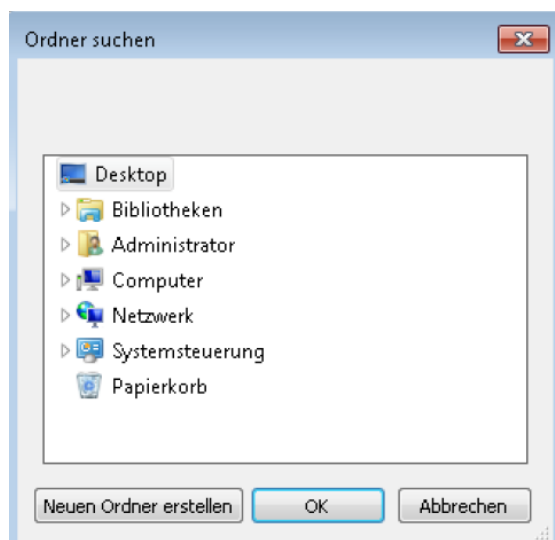
Read the "Users Guide" to get more information about the creation of DocumentsCorePack templates.

12.2 Import existing DocumentsCorePack Templates

On the General-tab you have the possibility to import either a folder or a file. First click on [Export All Templates] to export all Templates from your CRM-test system on your local computer. See next screenshot highlighted in yellow:

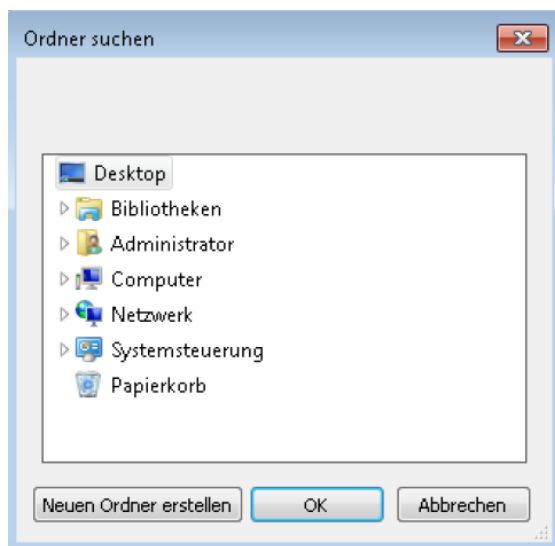
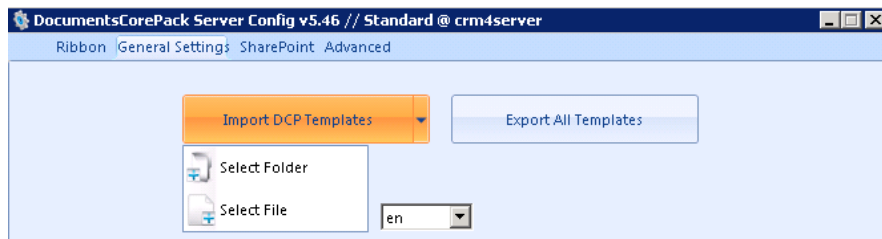


Chose an existing folder or create a new one where all Templates will be exported out of CRM. See next screenshot:

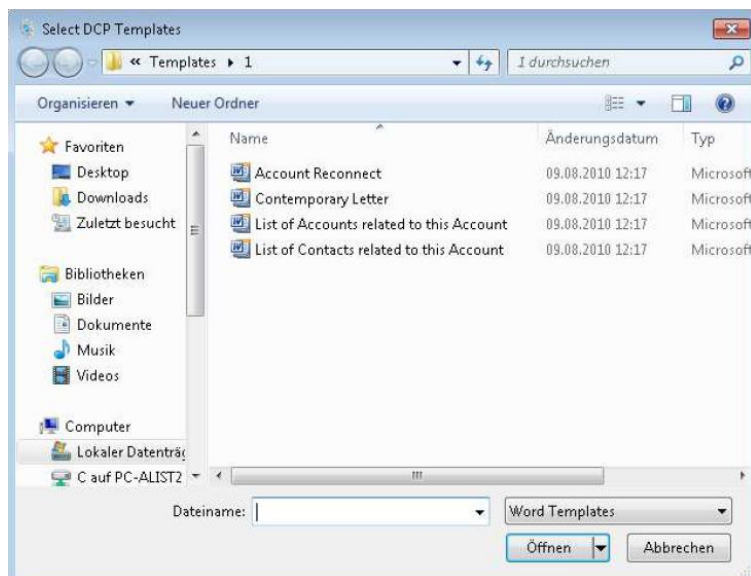


12.2.1 Import a Folder / Import a File

To import a folder or a file, click on the drop-down-button next to [Import DCP Templates] and select whether to import a folder or a file. See next screenshots:



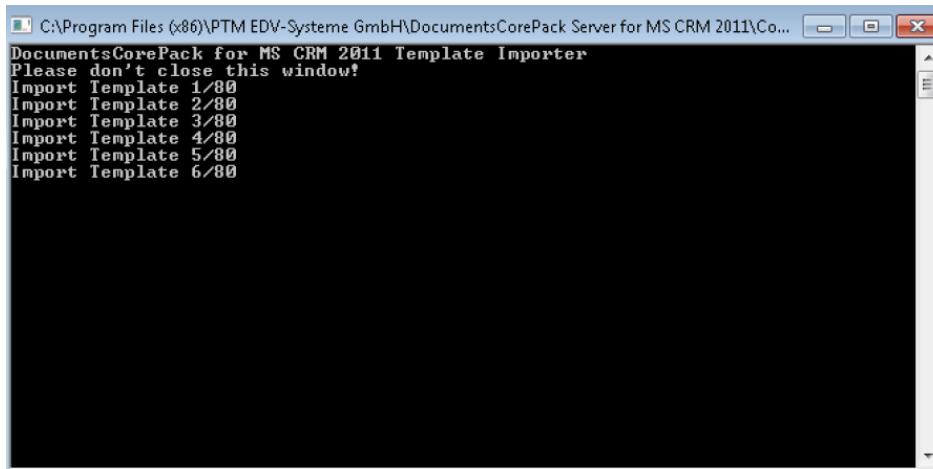
This screenshot shows a Template-Folder to be selected.



This screenshot shows the files to be selected.

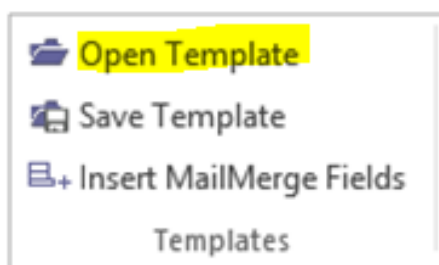
12.2.2 Processing Import

After you selected a folder or a file, you'll see the following window:



Please don't close this window! It will be closed automatically when the import was successful.

Now the Templates are imported in MS Word and ready to use with a click on "Open Template". See next screenshot:



13 Language Settings for DocumentsCorePack

The UI of DocumentsCorePack can be modified to any language. All UI display strings are stored in an XML File.

13.1 Language Settings on the Client

13.1.1 Location of the Language Settings on the Client

The name of the Language XML File is: <language>.XML

The language file is located in the sub folder **localization** of the DocumentsCorePack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Client for MS CRM 2011\Localization".

Example:

The Language file for the English UI is: **en.xml**

<Language setting> is the language code that DocumentsCorePack should use on the client. Each client can have its own language settings and files.

13.1.2 Modify the UI language on the Client

The UI language is determined at start up by the registry setting "Language". To modify this setting, follow this procedure:

1. Press START – RUN.
2. Type "regedit" and click OK.
3. Locate the registry key **HKEY_LOCAL_MACHINE\Software\PTM EDVSysteme\DocumentsCorePackClient2011**.
4. Change the value of the "language" setting to another language.
5. Close the registry editor.

NOTE: In order to use another language than English, you need to create a copy of the "en.xml" language file and rename it for a valid language setting. For example: To create a Dutch language file, rename the file to "nl.xml" and then translate the strings in the file.

After that, you have to open the registry and to change the value of "language" setting to **nl**.

13.1.3 How to translate a language file

You can use a text editor or a generic XML editor to edit the language files.

The format of the XML tags in the language file is:

```
<!-- MENU/Toolbar Name -->
<LabelValues>
  <name>MenuMainCaption</name>
  <value>Microsoft CRM</value>
</LabelValues>
<LabelValues>
  <name>MenuMainToolTip</name>
  <value>Microsoft CRM</value>
</LabelValues>
<LabelValues>
  <name>btnchoosedata</name>
  <value>Choose CRM Data</value>
</LabelValues>
<LabelValues>
  <name>tooltipchoosedata</name>
  <value>Choose CRM Data for mail merge</value>
</LabelValues>
<LabelValues>
  <name>btncrmmailmerge</name>
  <value>CRM MailMerge</value>
</LabelValues>
```

You should **ONLY** modify the contents of the <value> tags. Do not modify the <name> tag.

13.2 Language Settings on the Server

13.2.1 Location of the Language Settings on the Server

The UI of DocumentsCorePack Server can be modified to any language. All UI display strings are stored in an XML File.

The name of the language XML File is: <language>.XML

The language file is located in the sub folder **localization** of DocumentsCorePack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Server for MS CRM 2011\Localization".

Example:

The language file for the English UI is: **en.xml**

NOTE: The language XML-files from the server and client component are different. If you want to translate DocumentsCorePack, you have to translate both files, the language file on the client and on the server.

NOTE: In order to use another language than English, you need to create a copy of the "en.xml" language file and rename it for a valid language setting. For example: To create a Dutch language file, rename the file to "nl.xml" and then translate the strings in the file.

13.2.2 How to translate a language file

Look at chapter [10.1.3](#)

14 Too long merge fields problem

In some cases a problem with too long merge field names is occurring. Word just supports a length of 40 characters for a merge field.

So if you add two fields called

```
{ MERGEFIELD customerid_contact_parentcustomerid_address1_country \* MERGEFORMAT }
```

```
{ MERGEFIELD customerid_contact_parentcustomerid_address1_fax \* MERGEFORMAT }
```

Word shows you (after ALT-F9) two fields called

```
«customerid_contact_parentcustomerid_addr»
```

```
«customerid_contact_parentcustomerid_addr»
```

As a result, DocumentsCorePack can't differentiate them!

To solve this problem, we added the possibility to replace long names with short names (e.g. "parentcustomerid" with "pc1").

14.1 Setup too long merge fields

To solve this problem, we added the possibility to replace long names with short names (e.g. "parentcustomerid" with "pc1").

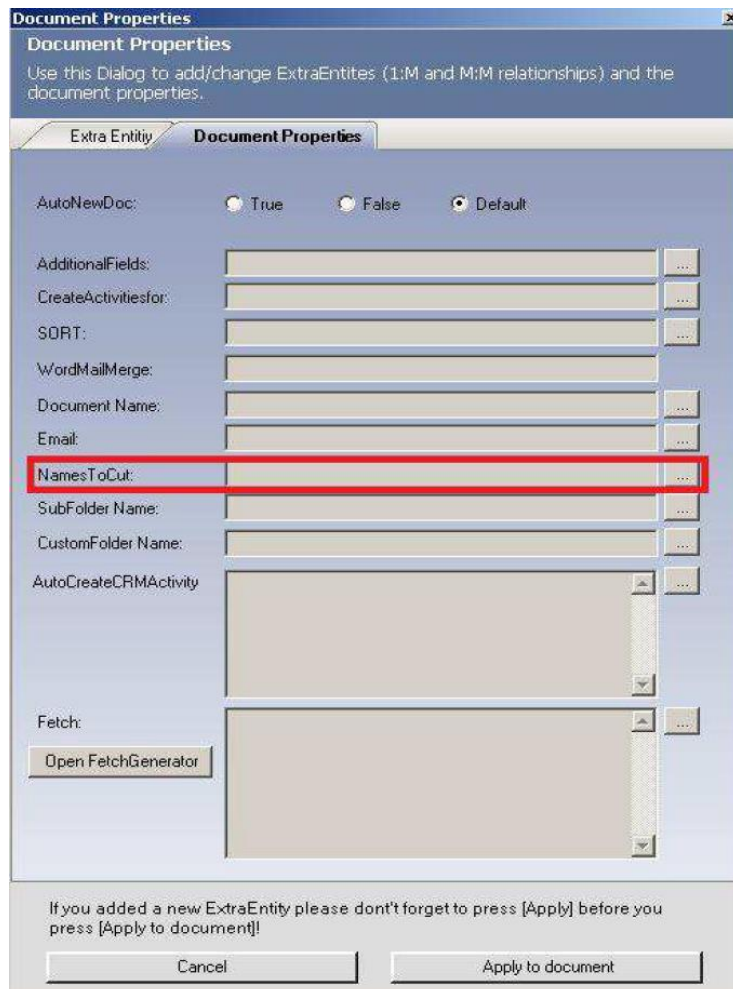
Notation: Old long – new short
 Each pair separated by ",".

In the **settings-entity** of the DCP-Server there is a new KEY called "**NamesToCut**". (Do not change this name!)

parentcustomerid-pc1,parentaccountid-pa1

This means to replace "parentcustomerid" with "pc1", also to replace "parentaccountid" with "pa1".

You also are able to store this in the template.



You can find the "Document Properties" in: Microsoft Office Word <www.mscremaddons.com><Insert MailMerge Fields><Document Properties>

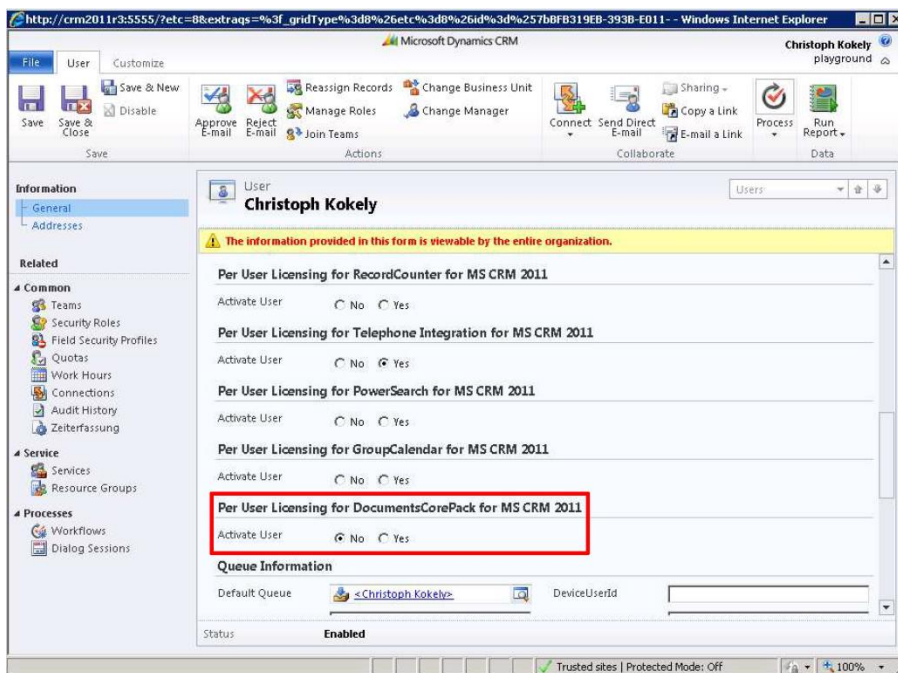
These Template-NamesToCut-Settings **overwrites** the settings from the server for the specific template!

CP replaces now all findings. If you have a merge field called "customerid_parentcustomerid_parentaccountid_name" it will be changed to "customerid_pc1_pa1_name".

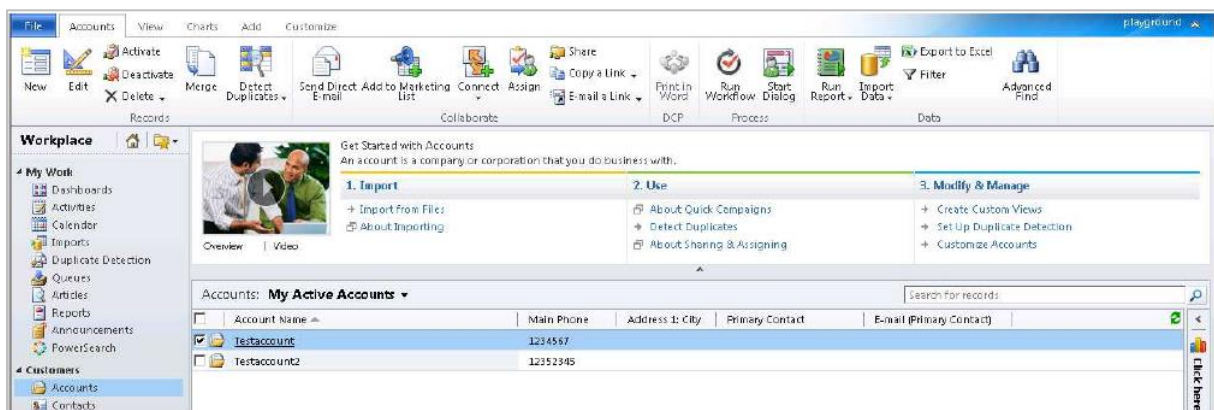
15 Per User Licensing -option

In CRM 2011 go to Settings/Administration/Users and pick a user. You will see "Per User Licensing for DocumentsCorePack for MS CRM 2011" where you are able to activate or disable a user's license.

If you activate more users as you have licenses, the product will stop working for all users.



By setting this option to "no", the license will be disabled for this user and the "print in word" button will be disabled as shown in the following screenshot.



15.1 Important Information

If you change the NamesToCut KEY maybe all OLD templates will be affected, because the merge fields are still stored with the long name in your old templates.

Example:

You have an existing document with two merge fields:
parentaccountid_name and parentaccountid_fax

Now you change the setting to shorten parentaccountid to pc1.
NEW Templates will be filled correctly! (Insert Mail Merge Fields inserts the correct short name into your template.)

All OLD templates which use merge fields and which include parentaccountid will not work anymore! So you have to edit them! (maybe by using the Replace...-function of Word)

Sometimes it will be the better way to replace full merge fields. So instead of changing just a part of a merge field let DCP replace the whole one.

For example:

From "customerid_contact_parentcustomerid_address1_fax" to
"cust_cont_par_adr1_fax"; Old templates won't be affected, but you have to add every field to the settings.

16 Contact

If you have questions to the product send an Email to
support@mscrm-addons.com

or visit our blog

<http://blogs.mscrm-addons.com>

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