



mscrm-addons.com
AttachmentExtractor
for MS CRM 2013

AttachmentExtractor for MS CRM 2013

Version 6.1, October 2013

User Guide

(How to work with AttachmentExtractor for MS CRM 2013)

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1 User Guide

This guide gives detailed explanations of all functionalities provided by **AttachmentExtractor** for MS CRM 2013.

If you need to reach us, see the Contact page.

2 Introduction

AttachmentExtractor offers you a service based tool to move attachments from within your CRM 2013 to either a Sharepoint location or a fileshare, saving precious database space on the CRM 2013 and enabling various indexing & search options via Sharepoint and Microsofts Search Server functionality.

AttachmentExtractor is able to connect to any Microsoft Dynamics CRM 2013 (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).

3 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 500 Items is supported in total.

4 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 Organization)

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

The Services **cannot** be started directly from the **ServiceManagement**. The product also installs a heartbeat service, which is monitoring the index services and restarting them if required. (E.g. on a server reboot). This service starts automatically on boot of the server and can be controlled via windows **ServiceManagement**.

Alternatively the services can be launched via the **ServiceManagement** Application, which is installed with the product.

AttachmentExtractor creates a new application log named www.mscrm-addons.com where status information, errors and batch process summaries are logged. This is independent of the extended logging features available in the service configuration panel.

Batches are processed every 100 seconds, the heartbeat service checks for service restarts every 500 seconds.

These times can be configured via registry, HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDV-Systeme\AttachmentExtractorserver.

Create a DWORD value called HeartBeatInterval to change the heartbeat services default, a similar value called ServiceInterval is available for the extraction services.

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 separated list of the following items is saved into the **SharePoint** Attributes. The Attributes are separated 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 AttachmentExtractor creates a weekly or daily subfolder, based on the created date of an item.

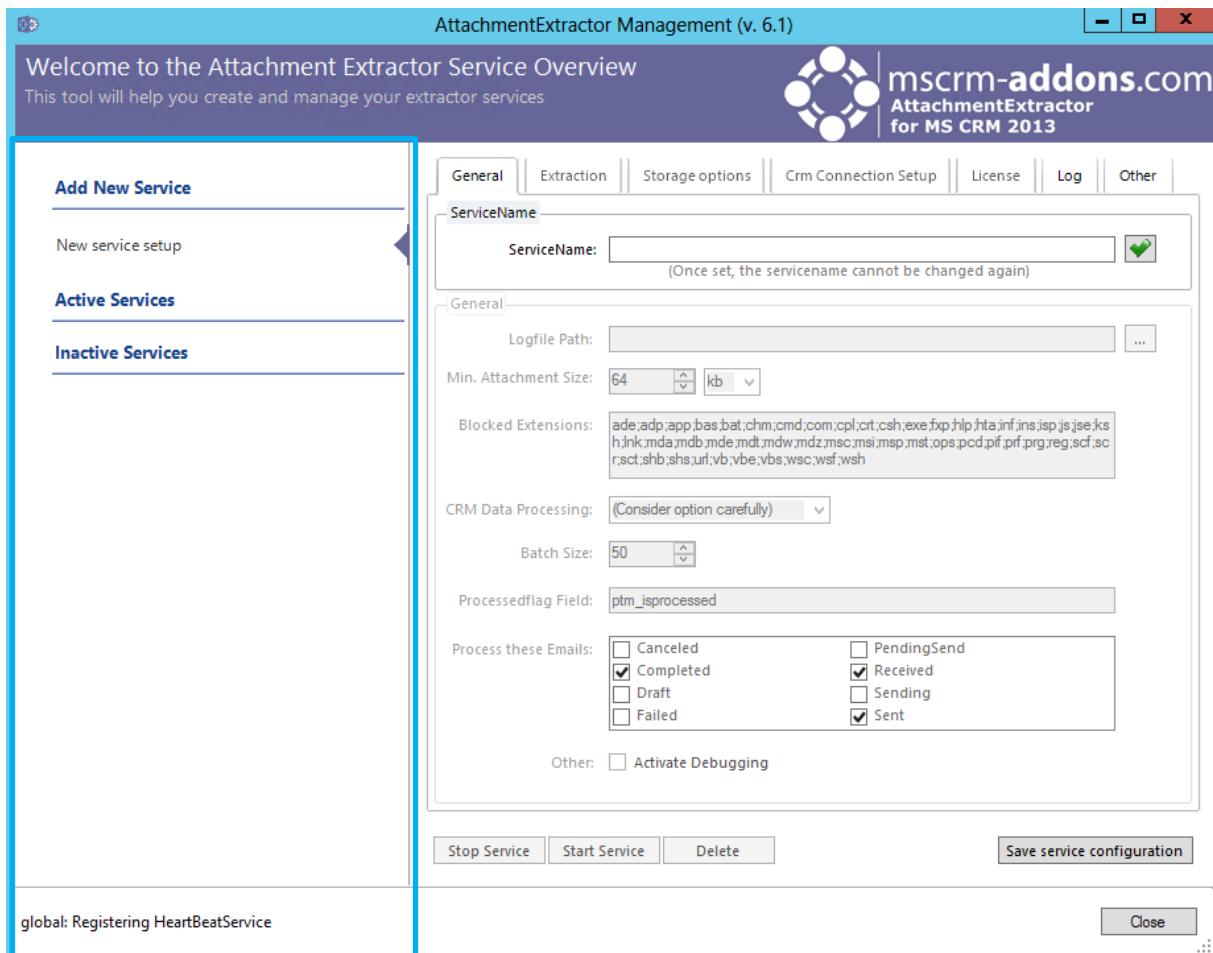
weekly subfolder

 2013 Week30 (22.7.2013 to 28.7.2013)	23.07.2013 13:21
--	------------------

daily subfolder

 2013 week04 (21-1-2013 to 27-1-2013)_14Fr	23.09.2013 08:24
---	------------------

5 Overview - ServiceManagement



Add New Service:

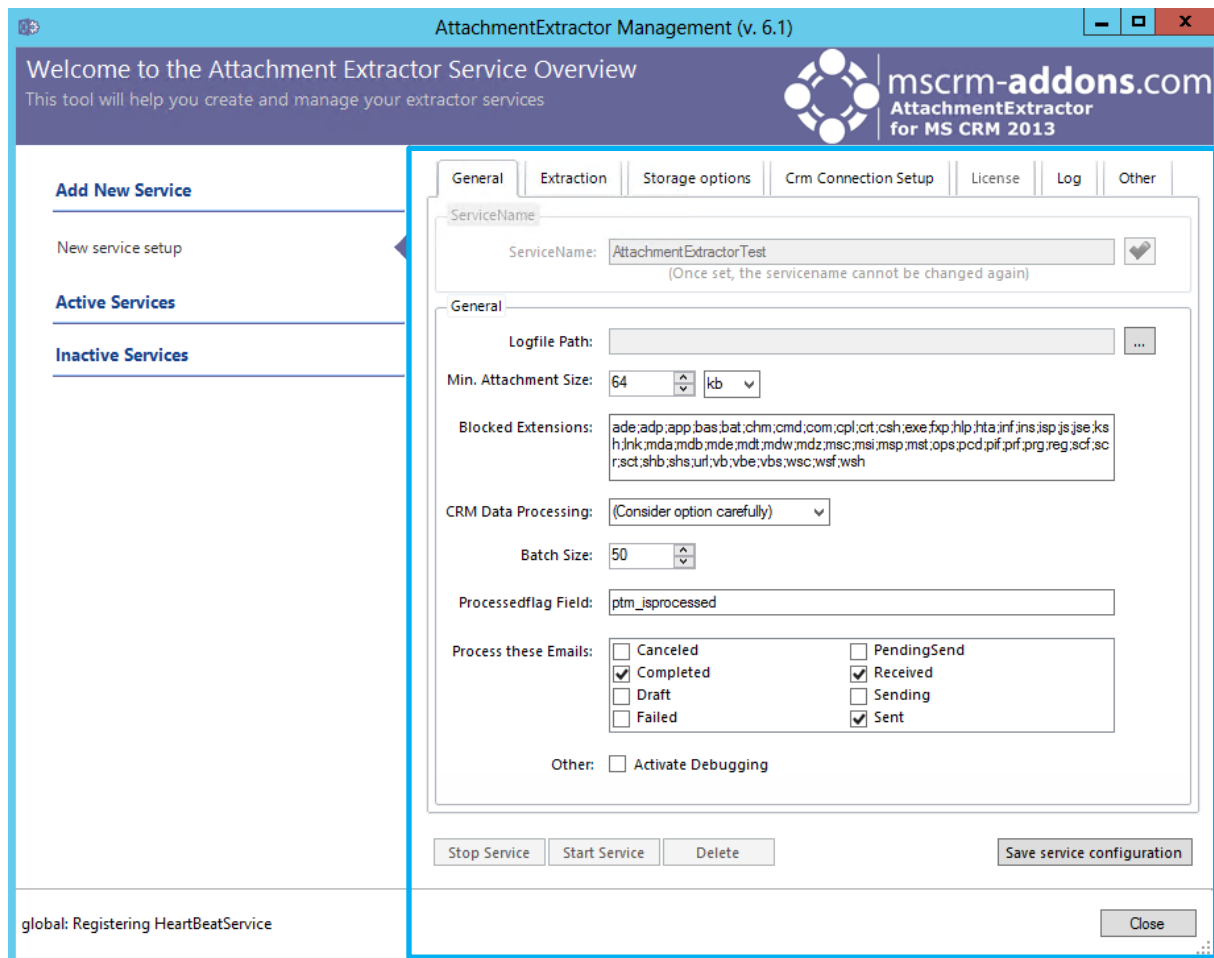
- **New service setup:** Start here to create a new Service

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

6 Configuration of a Service



AttachmentExtractor Management (v. 6.1)

Welcome to the Attachment Extractor Service Overview
This tool will help you create and manage your extractor services

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AttachmentExtractor
for MS CRM 2013

General | Extraction | Storage options | Crm Connection Setup | License | Log | Other

ServiceName: AttachmentExtractorTest
(Once set, the servicename cannot be changed again)

General

Logfile Path: ...

Min. Attachment Size: 64 kb

Blocked Extensions: ade,adp;app;bas;bat;chm;cmd;com;cpl;crit;csht;exe;fxp;hlp;hta;inf;ins;isp;js;jse;ks;h;lnk;mda;mdb;mde;mdt;mdw;mdz;msc;msi;msp;mst;ops;pod;pic;prf;prg;reg;scf;sc;rt;shb;shs;url;vb;vbe;vbs;wsc;wsf;wsh

CRM Data Processing: (Consider option carefully)

Batch Size: 50

Processedflag Field: ptm_isprocessed

Process these Emails:

<input type="checkbox"/> Canceled	<input type="checkbox"/> PendingSend
<input checked="" type="checkbox"/> Completed	<input checked="" type="checkbox"/> Received
<input type="checkbox"/> Draft	<input type="checkbox"/> Sending
<input type="checkbox"/> Failed	<input checked="" type="checkbox"/> Sent

Other: Activate Debugging

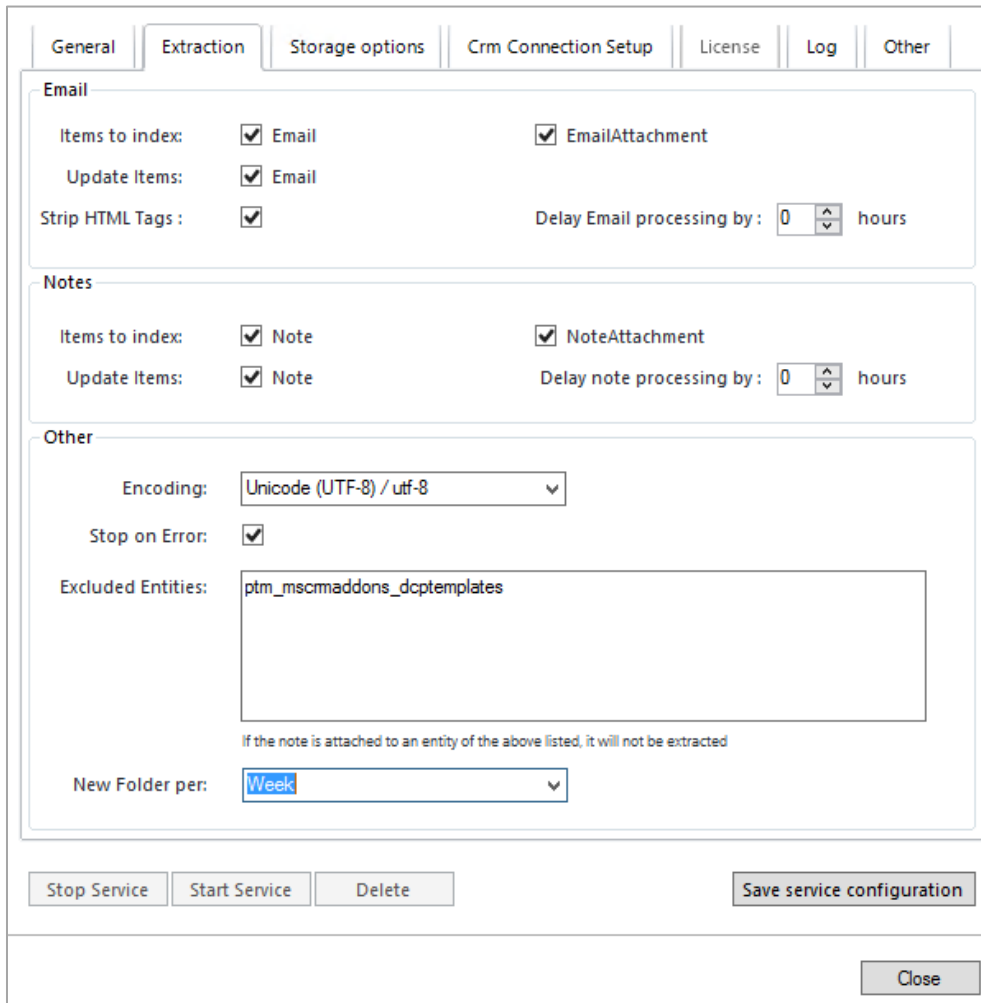
Stop Service Start Service Delete Save service configuration

global: Registering HeartBeatService

Close

- **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

7 Extraction



The screenshot shows the 'Extraction' configuration window with the following settings:

- Email:**
 - Items to index: Email, EmailAttachment
 - Update Items: Email
 - Strip HTML Tags:
 - Delay Email processing by: 0 hours
- Notes:**
 - Items to index: Note, NoteAttachment
 - Update Items: Note
 - Delay note processing by: 0 hours
- Other:**
 - Encoding: Unicode (UTF-8) / utf-8
 - Stop on Error:
 - Excluded Entities: ptm_mscmaddons_dcptemplates
 - New Folder per: Week

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

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

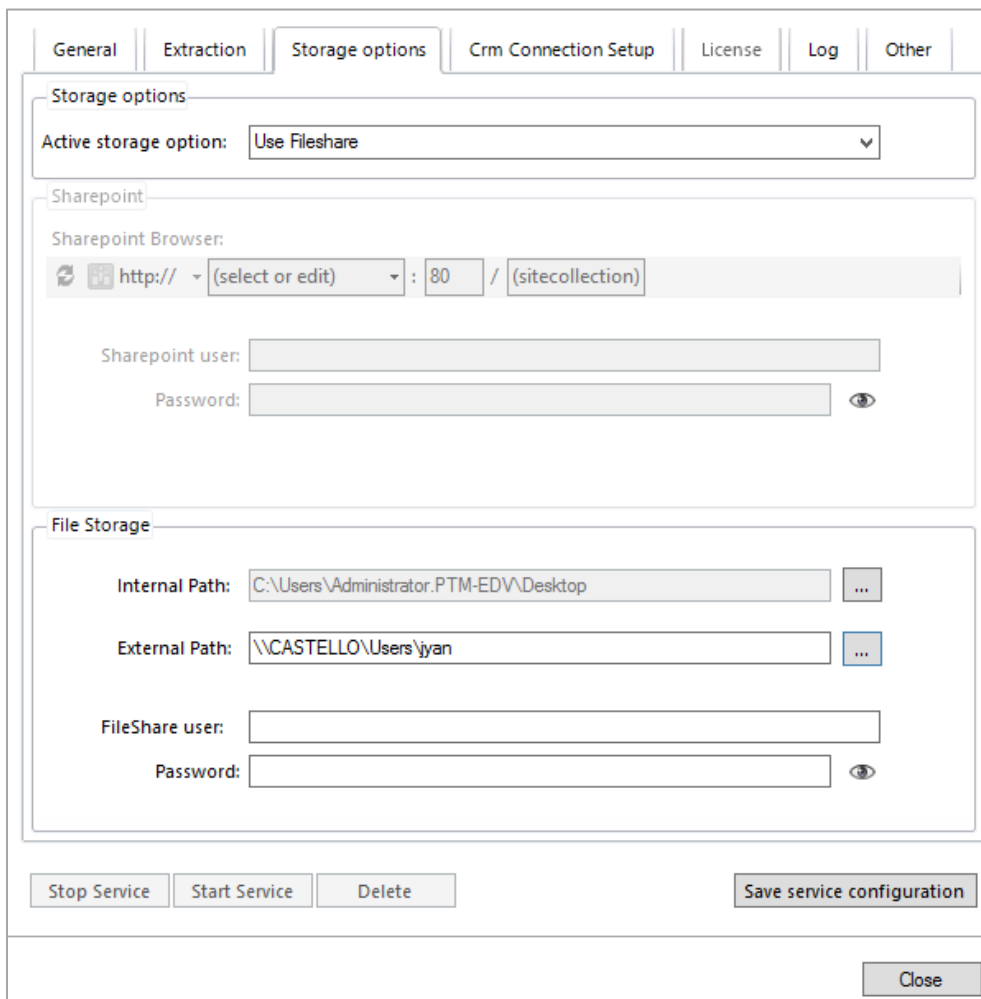
Selecting EmailAttachment or NoteAttachment does process the attachment ONLY

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. This setting should not be changed, unless you are sure, your Sharepoint needs a different encoding!
- 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. This is necessary to prevent the extraction of resource data required by Workflows or other Add-Ins. As an extraction cannot be reverted, please make sure you have identified all system required resources that use annotations for storing data before starting the service.

8 Storage Options



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

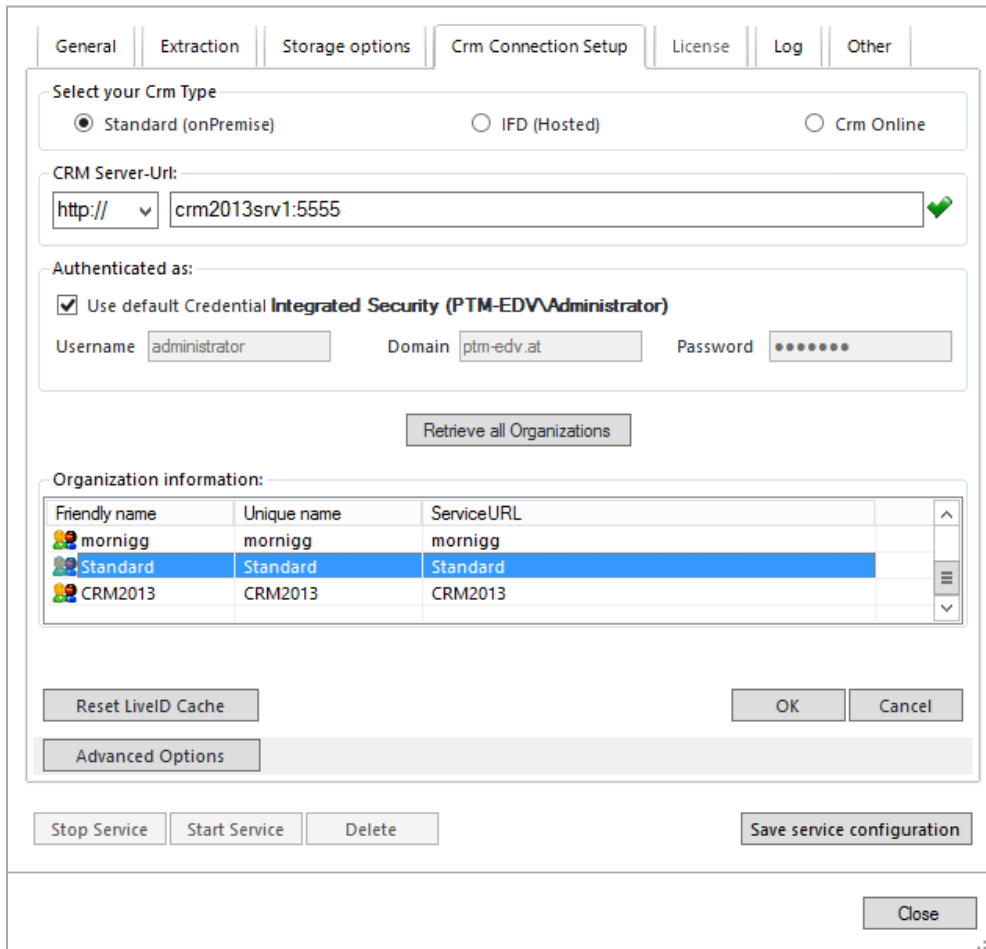
SharePoint

- **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. The (sitecollection) entry is optional and can be omitted, if not required.
- **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 ([\\fileservers\AE\Files](#))
- **FileShare user:** The username of the FileShare user
- **Password:** The Password of the FileShare user (Click on the Eye to see your Password unencrypted)

9 CRM-Connection Setup



General | Extraction | Storage options | **CrM Connection Setup** | License | Log | Other

Select your Crm Type

Standard (onPremise)
 IFD (Hosted)
 Crm Online

CRM Server-Url:

Authenticated as:

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

Username
 Domain
 Password

Organization information:

Friendly name	Unique name	ServiceURL
mornigg	mornigg	mornigg
Standard	Standard	Standard
CRM2013	CRM2013	CRM2013

- **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

10 License

General
Extraction
Storage options
Crm Connection Setup
License
Log
Other

Your license is Valid

General license information

	LicenseValue	Systemvalue	Status
LicenseModel	perSite		i
Licensekey	crsIXc3MfJrcstgSVJCKFXACR...	Licensekey installed	i
BusinessUnit	Standard	Standard	✔
Number of site licenses	110	6	✔
Licenses for Readonly Users	0	0	✔
Expiration	28.10.2015 00:00:00	730 days left	✔
Support	28.10.2015 00:00:00	730 days left	✔
Issued product	AttachmentExtractor	AttachmentExtractor	✔
Version upgrade covered ...	28.10.2015 00:00:00	01.01.0001 00:00:00	✔

License Status

LicenseState	valid	✔
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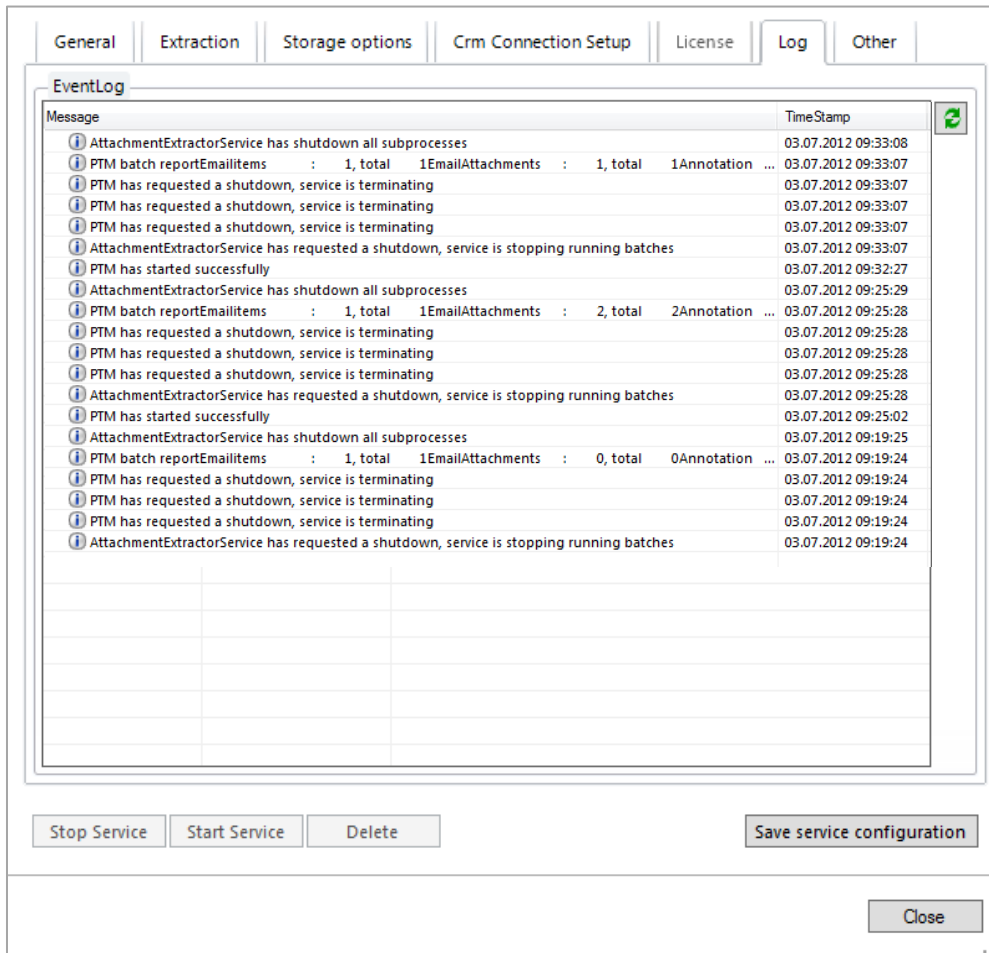
Stop Service
Start Service
Delete
Licensing
Reset Extraction
Save service configuration

Close

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, the service will terminate after each batch and only work through a maximum of 500 items total. After reaching that margin, it will stop completely.

11 Log



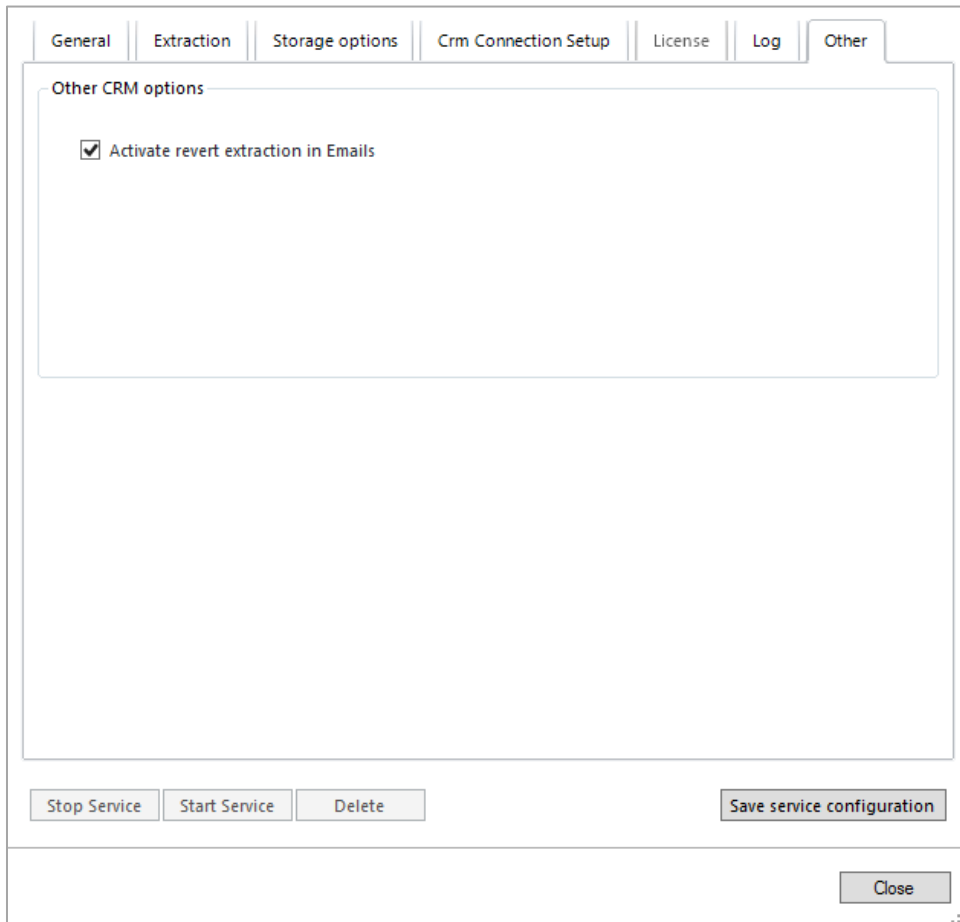
The screenshot shows a software configuration window with several tabs: General, Extraction, Storage options, Crm Connection Setup, License, Log, and Other. The 'Log' tab is active, displaying an 'EventLog' window. This window contains a table with two columns: 'Message' and 'TimeStamp'. The messages are informational, indicated by an 'i' icon in a blue circle. The messages describe the state of the AttachmentExtractorService and PTM batch reportEmailItems, including shutdowns, terminations, and successful starts. Below the table, there are buttons for 'Stop Service', 'Start Service', 'Delete', and 'Save service configuration'. A 'Close' button is located at the bottom right of the window.

Message	TimeStamp
AttachmentExtractorService has shutdown all subprocesses	03.07.2012 09:33:08
PTM batch reportEmailItems : 1, total 1EmailAttachments : 1, total 1Annotation ...	03.07.2012 09:33:07
PTM has requested a shutdown, service is terminating	03.07.2012 09:33:07
PTM has requested a shutdown, service is terminating	03.07.2012 09:33:07
PTM has requested a shutdown, service is terminating	03.07.2012 09:33:07
AttachmentExtractorService has requested a shutdown, service is stopping running batches	03.07.2012 09:33:07
PTM has started successfully	03.07.2012 09:32:27
AttachmentExtractorService has shutdown all subprocesses	03.07.2012 09:25:29
PTM batch reportEmailItems : 1, total 1EmailAttachments : 2, total 2Annotation ...	03.07.2012 09:25:28
PTM has requested a shutdown, service is terminating	03.07.2012 09:25:28
PTM has requested a shutdown, service is terminating	03.07.2012 09:25:28
PTM has requested a shutdown, service is terminating	03.07.2012 09:25:28
AttachmentExtractorService has requested a shutdown, service is stopping running batches	03.07.2012 09:25:28
PTM has started successfully	03.07.2012 09:25:02
AttachmentExtractorService has shutdown all subprocesses	03.07.2012 09:19:25
PTM batch reportEmailItems : 1, total 1EmailAttachments : 0, total 0Annotation ...	03.07.2012 09:19:24
PTM has requested a shutdown, service is terminating	03.07.2012 09:19:24
PTM has requested a shutdown, service is terminating	03.07.2012 09:19:24
PTM has requested a shutdown, service is terminating	03.07.2012 09:19:24
AttachmentExtractorService has requested a shutdown, service is stopping running batches	03.07.2012 09:19:24

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 message box.

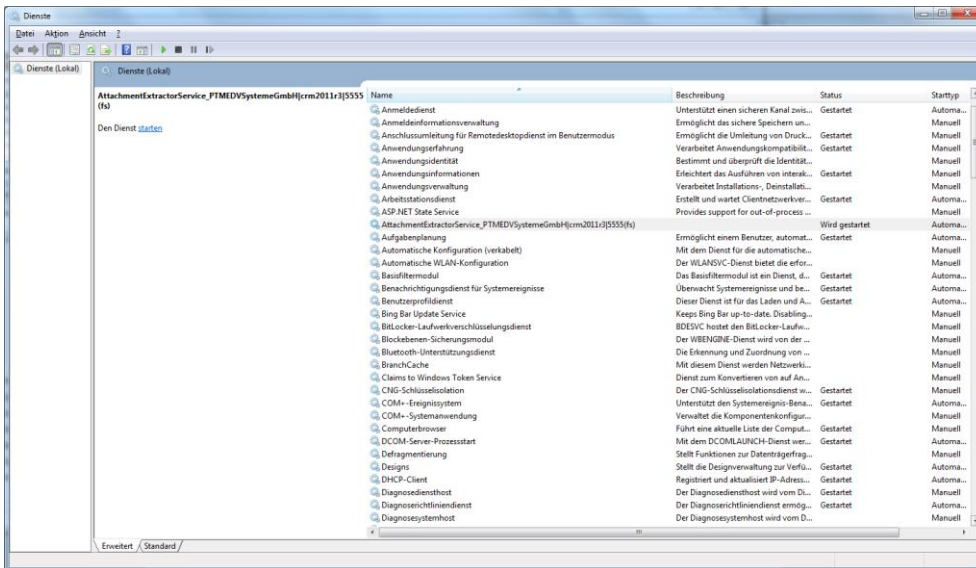
12 Other



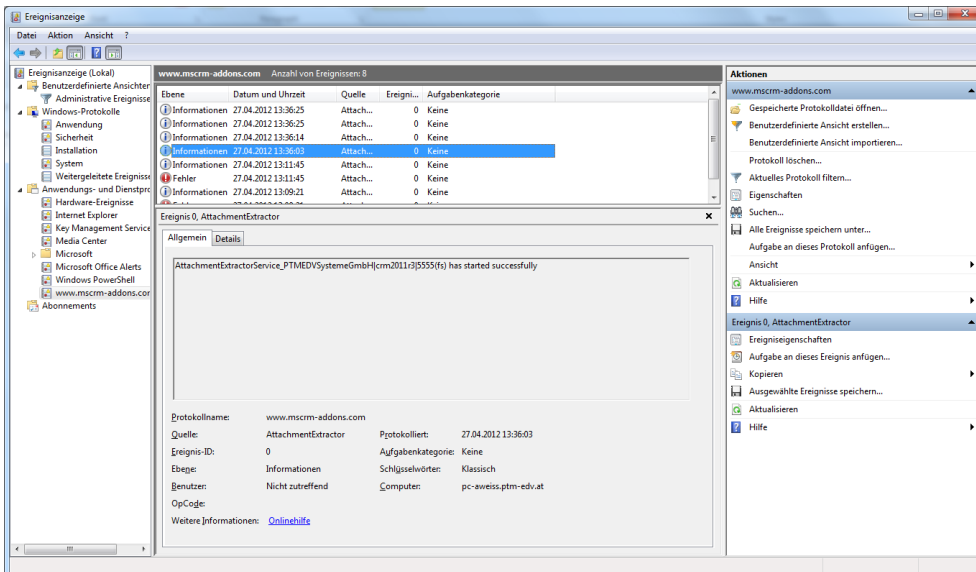
The screenshot shows a configuration window with several tabs: General, Extraction, Storage options, Crm Connection Setup, License, Log, and Other. The 'Other' tab is selected, displaying a section titled 'Other CRM options'. Inside this section, there is a single checkbox labeled 'Activate revert extraction in Emails', which is currently checked. Below the configuration area, there are four buttons: 'Stop Service', 'Start Service', 'Delete', and 'Save service configuration'. A 'Close' button is located in the bottom right corner of the window.

Activate revert extraction in Emails: Activating this option gives you the possibility to revert Email extractions. If you want to pass on, answer, or work with extracted Emails you should activate this option.

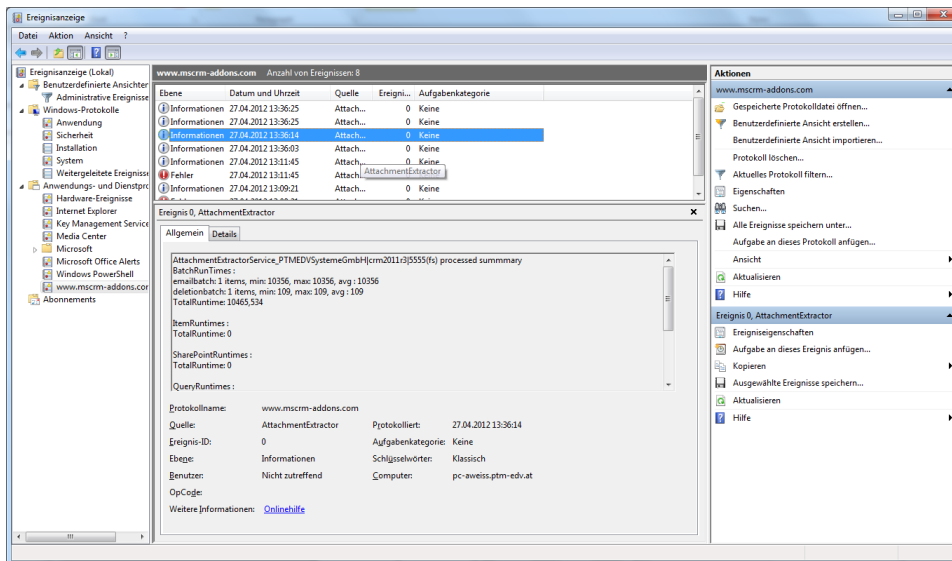
13 Additional Information



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.



14 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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