

# DocumentsCorePack Client for MS CRM 2013

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Client Installation Guide (How to install and configure DocumentsCorePack Client for MS CRM 2013)

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## 1 Common Information

Before installing **DocumentsCorePack Client for MS CRM 2013**, please read this document and follow the steps carefully.

This setup contains all installations and configuration needed for using DocumentsCorePack Client.

#### 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 Client for MS CRM 2013
- Configuring DocumentsCorePack Client for MS CRM 2013

## 2 License

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

## 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 2013 RTM On Premise
- Microsoft Dynamics CRM 2013 RTW Online
- Microsoft Dynamics Hosted (IFD)

#### 3.3 Windows Identity Foundation

The Windows Identity Foundation is included in the setup and will be installed as part of the DocumentsCorePack Server Installation.



## 3.4 Supported Operating Systems

- Windows 7 32/64bit
- Windows 8 32/64bit
- Windows Vista 32/64bit
- Windows Server 2008 32/64bit
- Windows Server 2008 R2 32/64bit
- Windows Server 2012 32/64bit

## 3.5 Supported Word Versions

- Word 2003
- Word 2007
- Word 2010 32/64bit
- Word 2013 32/64bit

## 4 Introduction

You could install the DocumentsCorePack Client on every supported operating system which is able to connect to your CRM 2013 server. During the installation you have to specify at least one organization in which the DocumentsCorePack Client will be installed.

#### **Possible Installation Scenarios:**

1. Install directly on a CRM 2013 On-Premise Server

You could install the DCP Server directly on a CRM 2013 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.

2. 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



## 5 Installation Client Component

This chapter explains how to install the client component.

## 5.1 Installing the DocumentsCorePack Client

#### **IMPORTANT Before installing the components:**

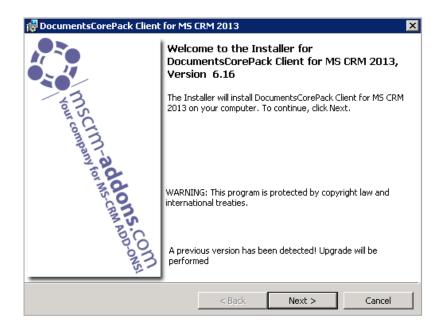
- 1. Close all Office products (MS Word, MS Outlook...)
- 2. Be sure that the machine is online to the MS CRM server.

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:

Run the "DocumentsCorePack Client for MS CRM 2013.exe" setup file.

You will see following window:



Click [Next >] to continue.



## 5.2 End User License Agreement (EULA)

License Agreement				addons.	con
Please read the following license agre carefully.	ement		Documents	CorePack	
FORM OF END L	JSER LICE	NSE AG	REEMENT		-
MSCRM-ADDONS.COM SOFT	TWARE L	ICENS	E AGREEM	ENT	
IMPORTANT: THIS SOFTWAR	E LICENS	E AGRE	EMENT ("LI	ICENSE	
AGREEMENT") IS A LEGAL AGI					
MSCRM-ADDONS.COM. READ IT CAREFULLY BEFORE USING THE SOFTWARE. IT PROVIDES A LICENSE TO USE THE SOFTWARE AND					
CONTAINS WARRANTY INFOR					<b>T</b>
I accept the terms in the license agreement     Print					
I do not accept the terms in the licens	se agreemen	it			
nstallShield					
				_	· · · · ·

Accept the license agreement and click [Next >].

Following window appears:

If this is a new installation you will automatically get to chapter 10.3.

🔂 DocumentsCorePack Client for MS (	ERM 2013 🗙
Ready to Install the Program The wizard is ready to begin installation	mscrm-addons.com
Click Install to begin the installation.	
If you want to review or change any of exit the wizard.	your installation settings, click Back. Click Cancel to
InstallShield	< Back

Click on [Install] to start the installation.



**NOTE:** for the case that an old DocumentsCorePack Client is currently in use on the same server you will see following window:

🛃 DocumentsCorePack Client for M5 CRM 2013	x
Files in Use Some files that need to be updated are currently in use.	m
The following applications are using files that need to be updated by this setup.	
WordMailMerge Data Provider	
Automatically close and attempt to restart applications.	
O Do not close applications. (A reboot will be required.)	
Install5hieldOK Cancel	

Click on [OK] to continue.

## 5.3 Select the installation folder

🛃 DocumentsCorePa	ck Server for MS CR	RM 2013		×
<b>Destination Folder</b> Click Next to install Change to install to	o this folder, or click a different folder.		mscrm-a	ddons.com
C:\Progra	:umentsCorePack Serv m Files (x86)\PTM EDV CRM 2013\			⊆hange
InstallShield		< <u>B</u> ack	Next >	Cancel

Select the installation folder and click [Next >].



## 5.4 Configure CRM Server

Next you have to configure your CRM server, select your profile or create a new profile and select your CRM Server type:

Logon information				
Logon information Welcome to your CRM Connection setup. Please specify your connection details to connect to CRM. If you do not know the connection details, please contact your system administrator				
CRM Connection Advanced Settings	Log			
Existing Profiles		Manage		
Select your Crm Type	C IFD (Hosted)	C Crm Online		
CRM Server-Url:				
Authenticated as:				
Use default Credential: <b>Not eno</b>	ugh information to retrieve organizations Domain Pass	word		
	Retrieve all Organizations			
Organization information:				
Friendly name Unique nam	e ServiceURL			
Reset LiveID Cache		OK Cancel		

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. Click on [Retrieve all Organizations], as soon as the organizations are retrieved, choose one and press the "OK"-button. (See next screenshot).

For DocumentsCorePack, the IFD setup is only required when using FileExplorer or SharePoint Folder and Sites Integration. You have to install IFD before you can use it. You can find the IFD wizard here: <a href="http://www.mscrmaddons.com/Downloads/DownloadIFDToolforMSCRM2011/tabid/195/ctl/Login/language/enUS/Default.aspx?returnurl=%2fDownloads%2fDownloadIFDToolforMSCRM2011%2ftabid%2f1\_95%2fDefault.aspx">http://www.mscrmaddons.com/Downloads/DownloadIFDToolforMSCRM2011/tabid/195/ctl/Login/language/enUS/Default.aspx?returnurl=%2fDownloads%2fDownloadIFDToolforMSCRM2011%2ftabid%2f1\_95%2fDefault.aspx</a>



ease specify your connection details to connect to CRM. If you do not know the connection details, ease contact your system administrator CRM Connection Advanced Settings Log	Select your Crm Type            • Standard (onPremise)         • IFD (Hosted)         • Crm Online             CRM Server-Url:             http:///         • Crm2013             Authenticated as:             Use default Credential: CONTOSO \Administrator             Use default Credential: CONTOSO \Administrator             Username Administrator             Domain CONTOSO             Password             Petrieve all Organizations                Organization information:             Friendly name         Unique name         ServiceURL             Pricedus             Contoso	alcome to your CRN					
ease specify your connection details to connect to CRM. If you do not know the connection details, ease contact your system administrator    CRM Connection Advanced Settings Log   Existing Profiles  [HKLM] cm2013 - Contoso   Select your Crm Type   © Standard (onPremise)    CRM Server-Url:  [http://] crm2013   CRM Server-Url:    Authenticated as:  Use default Credential: CONTOSO VAdministrator   Username   Administrator   Domain   CONTOSO   Password    Organization information:   Friendly name   Unique name   ServiceURL   @ contoso   Contoso	ease specify your connection details to connect to CRM. If you do not know the connection details, ease contact your system administrator    CRM Connection Advanced Settings Log   Existing Profiles  [HKLM] crm2013 - Contoso   Select your Crm Type   © Standard (onPremise)    CRM Server-Url:  http:/// image   CRM Server-Url:    Authenticated as:  Use default Credential; CONTOSO \Administrator   Username   Administrator    Pomain   CONTOSO    Password  Password   ************************************	reiconie to your citiy	4 Connection setup.				
ease contact your system administrator  RM Connection Advanced Settings Log  Existing Profiles [HKLM] cm2013 - Contoso Select your Crm Type  C Standard (onPremise) IFD (Hosted) Crm Online  CRM Server-Uri:  http://  crm2013 Crm2013 Contoso	ease contact your system administrator  RM Connection Advanced Settings Log  Existing Profiles [HKLM] crm2013 - Contoso Select your Crm Type  Standard (onPremise) IFD (Hosted) Crm Online  CRM Server-Url:  http://  Crm2013 Crm2013 Crm2013 Contoso Contaso Contase			lo not know the connection	details,		
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Select your Crm Type  Select your Crm Type  Select your Crm Type  Crm Online  CRM Server-Uri:  http://  Crm 2013  Authenticated as:  Use default Credential: CONTOSO Administrator  Username Administrator  Domain CONTOSO  Password  Passwo	Select your Crm Type  Select your Crm Type  Select your Crm Type  Crm Online  CRM Server-Uri:  http://  Crm2013  Authenticated as:  Use default Credential: CONTOSO\Administrator  Username Administrator  Domain CONTOSO Password  Password  Password  Password  Password  Password  Contoso	RM Connection Advanced Setti	ngs log				
Standard (onPremise)       IFD (Hosted)       Crm Online         CRM Server-Uri:	Standard (onPremise)     IFD (Hosted)     Crm Online  CRM Server-Url:     http://     crm2013     w  Authenticated as:     Use default Credential: CONTOSO \Administrator Username Administrator     Domain CONTOSO     Password     w      Retrieve all Organizations  Organization information:  Friendly name Unique name ServiceURL Contoso C	xisting Profiles [HKLM] crm2	2013 - Contoso	<b>•</b>	/anage		
CRM Server-Url:   http:// crm2013    Authenticated as:   Use default Credential:    CONTOSO Password	CRM Server-Url: http:// ▼ crm2013 Authenticated as: Use default Credential: CONTOSO \Administrator Username Administrator Domain CONTOSO Password ************************************	-Select your Crm Type					
http:///       Crm2013         Authenticated as:         Use default Credential: CONTOSO\Administrator         Username       Administrator         Domain       CONTOSO         Password       **********         Retrieve all Organizations         Organization Information:         Friendly name       Unique name         ServiceURL         Contoso       Contoso	http://       Crm2013         Authenticated as:         Use default Credential: CONTOSO \Administrator         Username       Administrator         Domain       CONTOSO         Password       **********         Retrieve all Organizations         Organization information:         Friendly name       Unique name         ServiceURL         Contoso       Contoso	Standard (onPremise)	C IFD (Hosted)	🔿 Crm On	line		
http:///       crm2013         Authenticated as:         Use default Credential: CONTOSO \Administrator         Username       Administrator         Domain       CONTOSO         Password       **********         Retrieve all Organizations         Organization information:         Friendly name       Unique name         ServiceURL         Contoso       Contoso	http://       crm2013         Authenticated as:         Use default Credential: CONTOSO\Administrator         Username       Administrator         Domain       CONTOSO         Password       **********         Retrieve all Organizations         Organization information:         Friendly name       Unique name         ServiceURL         Contoso       Contoso						
Authenticated as:          Authenticated as:         Use default Credential: CONTOSO \Administrator         Username       Administrator         Domain       CONTOSO         Password       ************************************	Authenticated as:          Use default Credential: CONTOSO \Administrator         Username       Administrator         Domain       CONTOSO         Password       ************************************						
Use default Credential: CONTOSO\Administrator Username Administrator Domain CONTOSO Password ********   Retrieve all Organizations  Organization information:  Friendly name Unique name ServiceURL  Contoso C	Use default Credential: CONTOSO \Administrator Username Administrator Domain CONTOSO Password *********   Retrieve all Organizations  Organization information:  Friendly name Unique name ServiceURL  Contoso	http://			<b>*</b>		
Use default Credential: CONTOSD\Administrator Username Administrator Domain CONTOSO Password ********	Use default Credential: CONTOSO\Administrator Username Administrator Domain CONTOSO Password *********   Retrieve all Organizations  Organization information:  Friendly name Unique name ServiceURL  Contoso						
Username Administrator Domain CONTOSO Password ********  Retrieve all Organizations  Organization information:  Friendly name Unique name ServiceURL  Contoso Contoso	Username Administrator Domain CONTOSO Password ********  Retrieve all Organizations  Organization information:  Friendly name Unique name ServiceURL  Contoso	-Authenticated as:					
Organization information:       Friendly name       Unique name       ServiceURL       2013       crm2013       crm2013       Contoso       Contoso	Retrieve all Organizations         Organization information:         Friendly name       Unique name         ServiceURL         Image: Contoso         Contoso         Contoso	Use default Credential: CON	TOSO\Administrator				
Organization information:       Friendly name       Unique name       ServiceURL       2013       crm2013       crm2013       Contoso       Contoso	Retrieve all Organizations         Organization information:         Friendly name       Unique name         ServiceURL         Image: Contoso         Contoso         Contoso	Username Administrator	Domain CONTOSO	Password ********			
Organization information: Friendly name Unique name ServiceURL Contoso Contoso Contoso	Organization information:       Friendly name     Unique name       ServiceURL       2 crm2013     crm2013       Contoso     Contoso	Username Password Password					
Organization information: Friendly name Unique name ServiceURL Contoso Contoso Contoso	Organization information:       Friendly name     Unique name       ServiceURL       2 crm2013     crm2013       Contoso     Contoso						
Friendly name     Unique name     ServiceURL       Image: Contoso     Contoso     Contoso	Friendly name     Unique name     ServiceURL       Contoso     crm2013     crm2013       Contoso     Contoso     Contoso		Retrieve all Organizations				
Friendly name     Unique name     ServiceURL       Image: Contoso     Contoso     Contoso	Friendly name     Unique name     ServiceURL       Contoso     crm2013     crm2013       Contoso     Contoso     Contoso						
2 crm2013     crm2013     crm2013       2 contoso     Contoso     Contoso	2 crm2013     crm2013     crm2013       2 contoso     Contoso     Contoso						
Contoso Contoso	Contoso Contoso Contoso						
Reset LiveID Cache OK Cancel			Contoso				
Reset LiveID Cache OK Cancel							
Reset LiveID Cache OK Cancel							
	Reset LiveLD Cache OK Cancel						

Click [OK] to continue.

## 5.5 Finish

The installation is now completed. Click on [Finish].

🔂 DocumentsCorePack Serve	r for MS CRM 2013	×
	InstallShield Wizard Completed	
Your com	The InstallShield Wizard has successfully installed DocumentsCorePack Server for MS CRM 2013. Click Finish to exit the wizard.	
MSCIM-add Your company for N		
10ns.C		
0 OTT		
	< Back Finish Cancel	



### 5.6 The "www.mscrm-addons.com"-tab

Once having finished the installation, go to your MS Word and you will see the www.mscrm-addons.com-tab on the ribbon. See next screenshot:

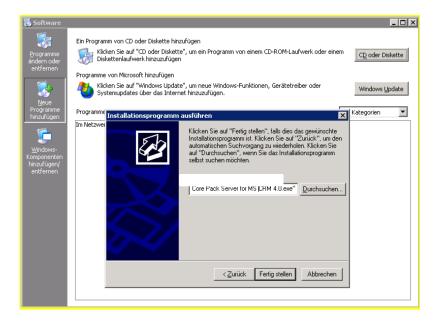
💀 🖯 🗧 🕤 🕫		name - Word	? 🗹 — 🗆 🗙
FILE HOME INSER	T DESIGN PAGE LAYOUT REFER	ENCES MAILINGS REVIEW VIEW W	ww.mscrm-addons.com Administrator -
🥌 Open Template 🤹 Save Template 昌+ Insert MailMerge Fields	Choose Create CRM Send as Save as CRM Data Activity PDF > DOCX >		
Templates	Get MS CRM Data	Settings Help Debug	~

The <u>www.mscrm-addons.com</u> – tab contains several options, like create a template with the "Insert MailMerge Fields"-option, "Create CRM Activity" or to send the document as a .pdf. Click on the www.mscrm-addons.com sign.

Here you can, e.g. save your document back to the specific SharePoint folder related to the CRMrecord. Or send your Document directly by clicking on the "Send as"-button. For more information, please read our DocumentsCorePack Client User Guide.

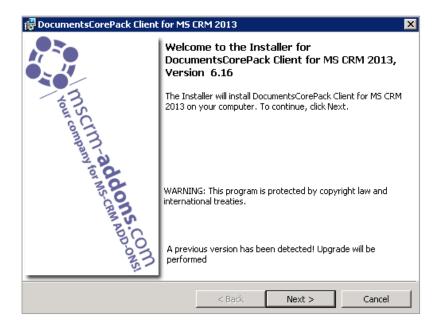
#### 5.7 Installation on a Terminal Server / Windows Server 2008

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] to continue.

Following window appears:

🛃 DocumentsCorePack Client for MS CR	RM 2013	×
License Agreement Please read the following license agreeme carefully.	ent mscrm-addons.c	om
FORM OF END USE	R LICENSE AGREEMENT	<u> </u>
MSCRM-ADDONS.COM SOFTW	ARE LICENSE AGREEMENT	
	EMENT BETWEEN CLIENT AND	T
<ul> <li>I accept the terms in the license agreement</li> <li>I do not accept the terms in the license agreement</li> </ul>		
InstallShield	< Back Next > Cancel	

Accept the End User License Agreement (EULA) and click [Next >] to continue.



Select Installation folder.

🙀 Documer	tsCorePack Server for MS	CRM 2013		×
	<b>on Folder</b> t to install to this folder, or clic :o install to a different folder.	k	mscrm-a	<b>ddons</b> .com <sup>rePack</sup>
	Install DocumentsCorePack S C:\Program Files (x86)\PTM E Microsoft CRM 2013\			<u>C</u> hange
InstallShield –		<u> </u>	Next >	Cancel

Click [Next >] to continue.

Next, confirm the installation:

🙀 DocumentsCorePack Client for M5	CRM 2013 🛛 🗙
Ready to Install the Program The wizard is ready to begin installation	mscrm-addons.com
Click Install to begin the installation.	
If you want to review or change any of exit the wizard.	f your installation settings, click Back. Click Cancel to
Instal Shield	
	< <u>B</u> ack Install Cancel

Click [Install] to continue.

In the connection-dialog, you have to enter the CRM server-name with the port. (e.g.: 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.



gon information							
	ur CRM Conne onnection details to c ystem administrator	<b>ction setup.</b> onnect to CRM. If you d		ne connectio			
ease contact your s	ystem auministrator						
CRM Connection Adv	anced Settings   Log	1					
Existing Profiles	ing Profiles [HKLM] crm2013 - Contoso Manag						
Select your Crm Type	elect vour Crm Type						
Standard (onPr	emise)	C IFD (Hosted)		O Crm	Online		
CRM Server-Url:							
http://							
Authenticated as:							
🔲 Use default Cred	ential: CONTOSO\Admi	nistrator					
Username Administ	rator Dor	nain CONTOSO	Password	****			
		Retrieve all Organizations					
<ul> <li>Organization inform;</li> </ul>	ation:						
Friendly name	Unique name	ServiceURL					
2013 crm2013	crm2013	crm2013					
🧱 Contoso	Contoso	Contoso					
Reset LiveID Cach	<u>·</u>			ок	Cancel		

**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\ActiveProfileSetting)

The regarding entry is called "CrmUseIntegratedSecurity". Change the value to "true".

Registrierungs-Editor			
Datei Bearbeiten Ansicht Bavoriten 🧎			
🖃 💻 Arbeitsplatz	Zeichenfolge bearbeiten		? 🗙
HKEY_CLASSES_ROOT	·		(setzt)
HKEY_CURRENT_USER	Name:		
	CrmUseIntegratedSecurity		
🕀 🦲 HARDWARE	<u>W</u> ert:		at:5555
E SAM			
SECURITY	True		0JmQjn5jwyQ==
SOFTWARE		OK	Abbrechen
ADFS			
E - Classes E - Clents	CrmUseIntegratedSecurity	REG SZ	False
		REG SZ	Administrator
H → Microsoft	abDescription	REG SZ	TERMINALSERVER6\Administrator 29.05.2009 11:46:56
	DiscoveryCrmServiceUrl	REG SZ	http://romadur:5555/NSCrm5ervices/2007/CrmService
	DiscoveryMetabaseServiceUrl	REG_SZ	http://romadur:5555/NSCrm5ervices/2007/MetadataS
Program Groups	ab exclude MetaDataService	REG_5Z	False
E- 🧰 Schlumberger	HttpsDiscovery	REG_SZ	False
🔁 Secure	ab Organisation Friendly Name	REG_SZ	PTM EDV Systeme GmbH
🗄 🧰 Wow6432Node	OrganisationName	REG_5Z	PTMEDYSystemeGmbH
🕀 🧰 Classes	ab PerUserFieldName	REG_SZ	new_tiuser
🕀 🧰 Clients	appreferredConnection	REG_SZ	1
😟 🧰 Gemplus	RetryDnConnectionFailed	REG_5Z	False
🕀 🦲 Microsoft	ab SqCatalogName	REG_SZ	
	ab SqServerName	REG_SZ	
Policies		REG_SZ	True
Frogram Groups     Frogram Groups     Frogram Groups	ab TimeOut	REG_SZ	90000
	ab UseWebProxy	REG_5Z	False
	1		



## 5.8 Installation on a Terminal Server for CRM Online

When installing DocumentsCorePack on a terminal server for CRM Online, you have to provide your "Login Credentials" for the initial installation. Enter a valid Username, and Password (see next screenshot).

gon information				
Please specify your details, please cont	our CRM Coni connection details act your system ad	to connect to CRM. If you	do not know the c	onnection
CRM Connection	dvanced Settings Log			
Existing Profiles	[HKCU] mw052014.cm	4.dynamics.com - Contoso		▼ Manage
Select your Crm Typ	e			
🔘 Standard (or	Premise)	IFD (Hosted)	۲	) Crm Online
Authenticated as: -		2014. onmicrosoft. com Domain Retrieve all Organizations	Password •••••	mics.com ♥
Organization infor				
Friendly name	Unique name	ServiceURL		
Le Contoso	mw052014	mw052014		
Reset LiveID Cac	he		ОК	Cancel

Now you have to modify the registry so other users are able to create a connection with their own login credentials easily when they start using DocumentsCorePack for the first time on the Terminal Server.

[more]...



1) First of all, please run "regedit" in the Start Pane (see next screenshot)

Programs (1)
regedit Log off
🍽 Start 🛛 🏉 🚞 🏭 🛃 🗾 💽

Screenshot shows "regedit" in the Start Pane.

Now 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\ActiveProfileSetting") (see next screenshot)

Dependent on the architecture of your server (x86 or x64) the location may vary "HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\PTM EDVSysteme\". If this node is present please also perfrom the following modification for these registry keys.



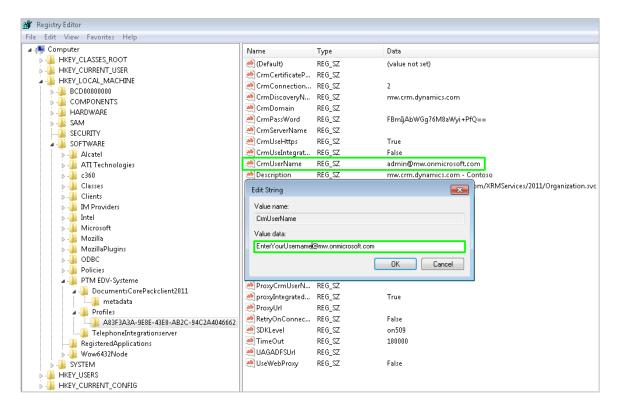
💣 Registry Editor File Edit View Favorites Help			
🖌 📲 Computer	Name	Туре	Data
HKEY_CLASSES_ROOT HKEY_CURSENT_USER HKEY_CURRENT_USER HKEY_CURRENT_USER HARDWARE COMPONENTS HARDWARE SAM SECURITY SOFTWARE Alcatel Alcatel Alcatel Alcatel Alcatel Alcatel Testonologies Alcatel <p< td=""><td>Name Name</td><td>REG_SZ REG_SZ REG_SZ REG_SZ REG_SZ REG_SZ REG_SZ REG_SZ REG_SZ REG_SZ REG_SZ</td><td>Data         (value not set)         SOFTWARE\PTM EDV-Systeme\Profiles\A83F3A3A-9E8E-43E8-AB2C-94C2A4046662         true         false         europe         letter         account         false         invoicedetail,quotedetail,salesorderdetail,opportunityproduct,new_mscrmaddons_key         en         c\program files (x86)\ptm edv-systeme gmbh\documents core pack client for ms crr         false         true</td></p<>	Name Name	REG_SZ REG_SZ REG_SZ REG_SZ REG_SZ REG_SZ REG_SZ REG_SZ REG_SZ REG_SZ REG_SZ	Data         (value not set)         SOFTWARE\PTM EDV-Systeme\Profiles\A83F3A3A-9E8E-43E8-AB2C-94C2A4046662         true         false         europe         letter         account         false         invoicedetail,quotedetail,salesorderdetail,opportunityproduct,new_mscrmaddons_key         en         c\program files (x86)\ptm edv-systeme gmbh\documents core pack client for ms crr         false         true

2) Next, select the correct profile and search for the CrmUserName key (see next screenshot).

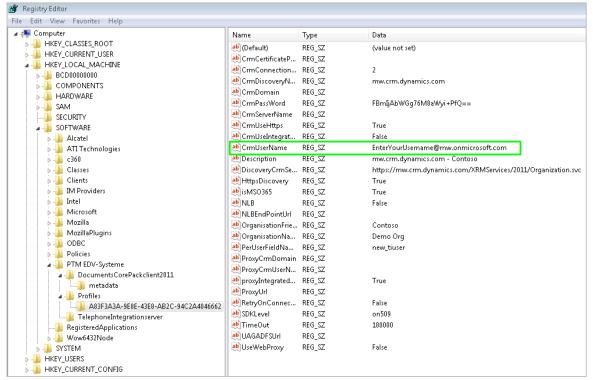
💣 Registry Editor			
File Edit View Favorites Help			
🖌 🚛 Computer	Name	Туре	Data
NEV_CLASSES_ROOT	(Default)	REG_SZ	(value not set)
	CrmCertificateP	-	
	CrmConnection	REG SZ	2
▶ - 🎽 BCD0000000	DiscoveryN		mw.crm.dynamics.com
	A CrmDomain	REG_SZ	,
HARDWARE	CrmPassWord	REG SZ	FBmIjAbWGg76M8aWyi+PfQ==
⊳ B SAM	CrmServerName	REG SZ	· · · · · · · · · · · · · · · · · · ·
	DrmUseHttps	REG_SZ	True
Alcatel	DrmUseIntegrat	-	False
> Alcater > ATI Technologies	CrmUserName	REG SZ	admin@mw.onmicrosoft.com
▶ - → C360	ab Description	REG_SZ	mw.crm.dynamics.com - Contoso
Classes	DiscoveryCrmSe	-	https://mw.crm.dynamics.com/XRMServices/2011/Organization.
Clients	HttpsDiscovery	REG SZ	True
M Providers	ab is MSO365	REG_SZ	True
Intel	ab NLB	REG SZ	False
Microsoft	NLBEndPointUrl	REG SZ	1 disc
🔈 📲 Mozilla	DrganisationFrie	-	Contoso
MozillaPlugins	DrganisationNa	-	Demo Org
DOBC	PerUserFieldNa	-	new tiuser
Policies	ProxyCrmDomain	-	new_daser
a 🌗 PTM EDV-Systeme	ProxyCrmUserN	-	
a 🔑 DocumentsCorePackclient2011	ProxyCrmoserv proxyIntegrated		True
🛄 metadata	ProxyUrl	REG_SZ	True
A 🌗 Profiles	RetryOnConnec	-	False
	RetryOnConnec      SDKLevel	-	raise on509
TelephoneIntegrationserver	-00	REG_SZ	
	DimeOut	REG_SZ	180000
▶ - 🎴 Wow6432Node	~	REG_SZ	F-1
▶	ab UseWebProxy	REG_SZ	False
▶-🄑 HKEY_CURRENT_CONFIG			



**3)** Now change the existing key from your actual username to e.g. "EnterYourUsername@mw.onmicrosoft.com". It is important that the domain is still the same as for your login (see next screenshot)



After his step your new profile should look like this:



Screenshot shows new string.



That is all you need to do. If a different user logs on for the first time on the server, he will be presented this dialog, as soon as he tries to use DocumentsCorePack and can enter their user specific credentials. (See next screenshot)

👿 Documen	t1 - Microsoft	Word (Not Respondi	ng)						
File H	Home Insei	rt Page Layout	References	Mailings	Review	View	/ Developer	www.mscrm-addons.com	
💼 Open Tem	plate		$\sim$	1 ?	<u>4</u>	2			
💼 Save Tem	Login require			X	s Core	Help	Shelter		
🖴 + Insert Ma	Loginrequie				ings	neip	Live		
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	Username:	EnterYourUsername@	mw052014 opmic	resoft.com					
		Enteri ouro semainete	110002014.0111110	Josoft.com					
	Domain:								
	Password:	•••••		۲					
	Advanced	7	Cancel	OK					
l	_								

Screenshot shows dialog which appears when a different user logs in for the first time on a terminal server using DCP.

**ATTENTION:** These steps will only work, if the actual users do not have an actual profile yet, which is only the case on initial installation.



## 5.9 Unattended Setup DocumentsCorePack Client for MS CRM 2013

To install the DocumentsCorePack Client for MS CRM 2013 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:

[YOURCRMSERVER: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.

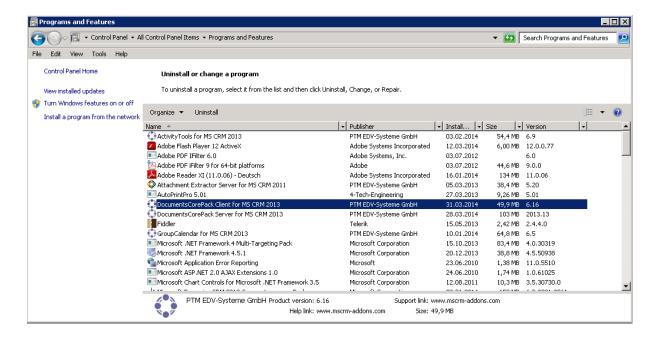


## 6 Uninstall DocumentsCorePack Client Component

In order to uninstall DocumentsCorePack Client for MS CRM 2013 select "Programs and Features" in the Control Panel.

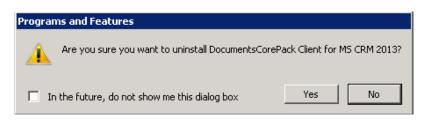
	ns 📃 🗖	
🕘 👻 🛧 📴 🕨 Control Panel 🕨	✓ ♂ Search Control Panel	
Adjust your computer's settings		View by: Small icons 👻
🏲 Action Center	🇓 Administrative Tools	🛃 AutoPlay
💶 Color Management	Credential Manager	Date and Time
🔣 Default Programs	🚔 Device Manager	ka Devices and Printers
🖳 Display	🕒 Ease of Access Center	F Folder Options
💦 Fonts	🚨 Indexing Options	🕼 Install Application on Remote Deskt
🔂 Internet Options	🍓 iSCSI Initiator	🕮 Keyboard
🗫 Language	🕖 Mail (32-bit)	Ø Mouse
辈 Network and Sharing Center	🔜 Notification Area Icons	📰 Phone and Modem
Power Options	Programs and Features	🔗 Region
🐻 RemoteApp and Desktop Connections	🛋 Sound	🕎 System
🟹 Taskbar	😤 Text to Speech	📧 Troubleshooting
🍇 User Accounts	🔐 Windows Firewall	🐼 Windows Update

Search for the DocumentsCorePack Client CRM 2013 in "Uninstall or change a program" and click on "Uninstall"





Following window appears:



Click on [Yes] to confirm Uninstall. Click on [No] to stop the process.

## 7 Contact

If you have questions to the product send an email to <u>support@mscrm-addons.com</u> or visit our blog <u>http://blogs.mscrm-addons.com</u>

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