

mscrm-addons.com
DocumentsCorePack
for Microsoft Dynamics CRM

DocumentsCorePack/ AttachmentExtractor Online Configuration for MS CRM 2015/2016 and Dynamics 365

v.0.1, March 2017

DocumentsCorePack and AttachmentExtractor
(How to work with DocumentsCorePack and AttachmentExtractor Online
for MS CRM 2015/2016 and Dynamics 365)

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Preamble

This documentation is intended to guide you through the installation and usage of DocumentsCorePack and AttachmentExtractor Online Configuration for Microsoft Dynamics CRM 2015/2016 and Microsoft Dynamics 365.



AttachmentExtractor Online was first introduced in 2017. This means, that the add-on works with Microsoft Dynamics 365 only.

Target Audience

This guide is intended for users working with DocumentsCorePack and AttachmentExtractor Online version who have the following minimum skills:

- Basic Microsoft Dynamics CRM Knowledge
- Maintaining and configuring a Microsoft CRM Organization

Supported Web Browsers and versions

Supported Web Browsers:

- Internet Explorer 10 and higher
- Chrome
- Edge
- Firefox

One of the following versions of Microsoft Dynamics CRM must be available:

- Microsoft Dynamics CRM Server 2015/2016
- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online

Purpose of DocumentsCorePack and AttachmentExtractor Online Configuration?

The DocumentsCorePack and AttachmentExtractor Online Configuration has many advantages, one of them being the reason that a local server is not required anymore. This means, that precious storage space is saved on your local server, while all ServerBased features of the add-ons are available. Furthermore, the services are hosted and updated by our support team.

1 Basics on Online Configuration

This documentation is divided into three parts. While the first part is filled with basic information on the online configuration, which is the same for DocumentsCorePack and AttachmentExtractor, part 2 and 3 of this documentation focus clearly on the differences between DocumentsCorePack and AttachmentExtractor.

ADDITIONAL MATERIALS

Next to this documentation, we do provide video tutorials for [DocumentsCorePack](#) and [AttachmentExtractor](#) that show how to start the Online Configuration step by step.

Also, you can find further information regarding the AttachmentExtractor Online Configuration [here](#).

For more detailed information, please read the now following chapters carefully.

1.1 How to start the Online Configuration

To start the Online Configuration, please follow the below steps. There is no difference between starting the Online Configuration for DocumentsCorePack or AttachmentExtractor – you must only select the product of your choice when asked.

1.1.1 Step 1: Open the Online Configuration Service

One possible way to start a new Online Service Configuration is via our website www.msrm-addons.com. On our website, please navigate to Products, select AttachmentExtractor or DocumentsCorePack (depends on which product you would like to configure) and then, click on the **[Configure Service]**-button.

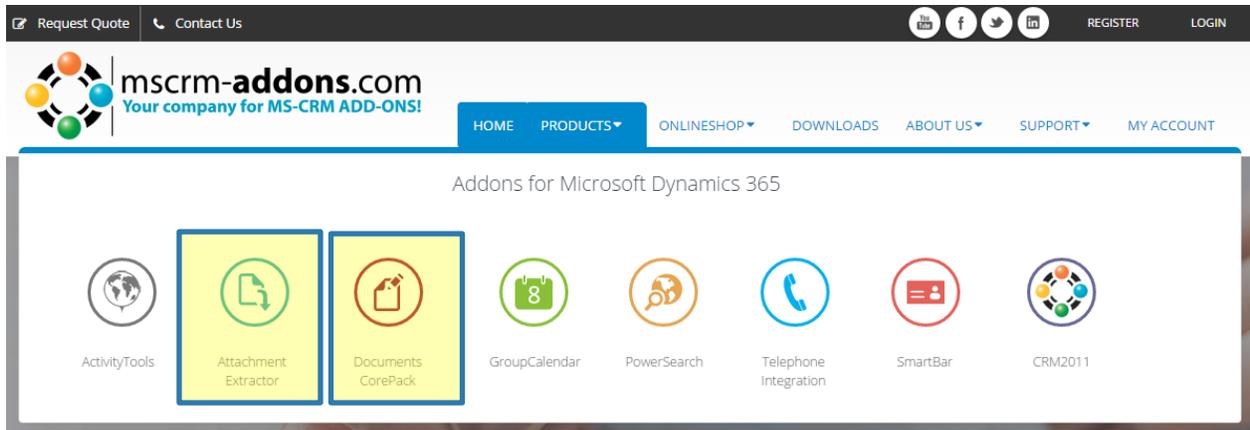


Figure 1 Select your preferred add-on for the Online Configuration

1.1.2 Step 2: Login or register to mscrm-addons.com

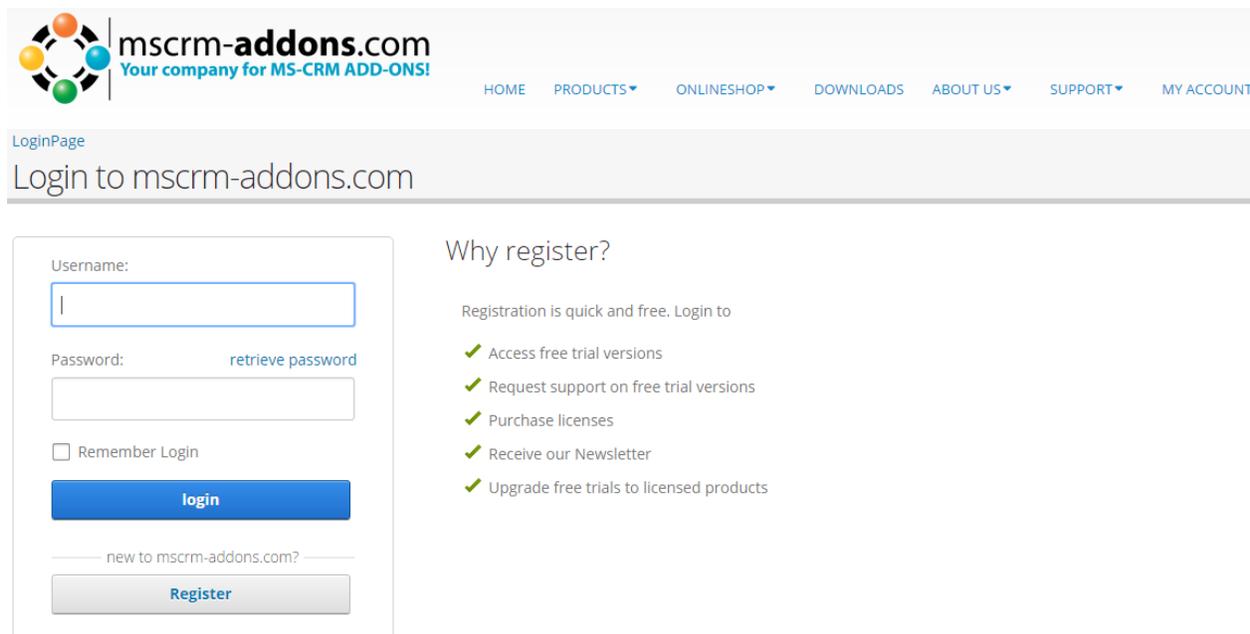


Figure 2 Login to mscrm-addons.com

1.1.3 The Online Configuration window

Once you have logged in, you will be provided with the Online Configuration window.

In this window's field, you get an overview of your hosted service(s) **1** (provided, that you have already configured a service).



If there is no service configured, the field is empty.

Also, you have the possibility to setup a service with a click on the **[Add]**-button **2**.

ID	Name	Status	Mode	Organization	CRM	Instance
262...	Testservice1	Stopped	Copy	bcodospan2	https://bcodospan2.crm4.dynamics...	https://atttexteu00...

Figure 3 Online Configuration window

1.2 How to setup an MS Dynamics 365 Online Service for AE and DCP

An MS Dynamics 365 Online Service consists of two parts. First of all, a connection to MS Dynamics 365 must be established via the CRM connection profile, which is required to connect Microsoft Dynamics 365 Online with your Microsoft Dynamics 365 organization. The needed steps are the same for AttachmentExtractor and DocumentsCorePack.

Once you have setup your connection, you are ready to set up a DocumentsCorePack or an AttachmentExtractor Service.

The configuration varies, depending on which product you select. Please find further information on the different setups in [CHAPTER 2, ADVANCED ONLINE CONFIGURATION ON PAGE 9](#).



The user with which you are connecting for DocumentsCorePack must have system administrator rights to set up the Online Service.

1.2.1 CRM Connection Setup – Settings

Please find a detailed description of the connection setup settings below.

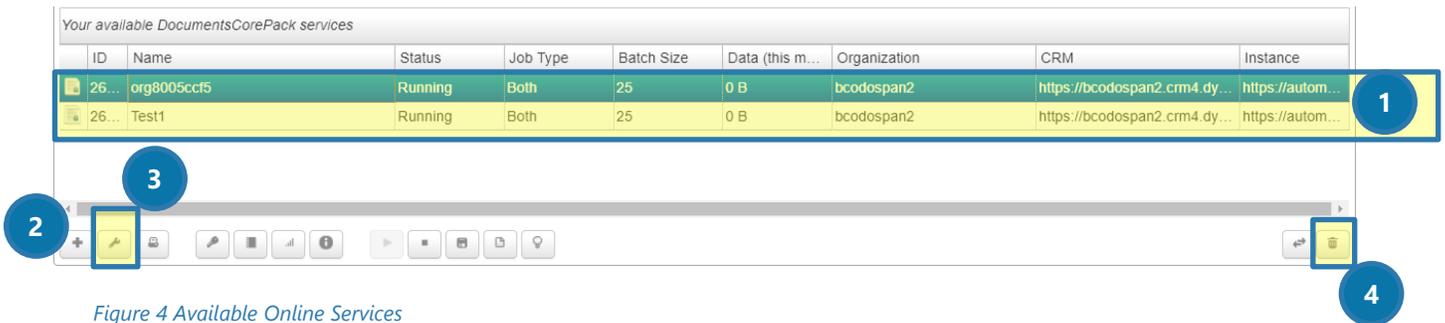


Figure 4 Available Online Services

1 CRM ONLINE SERVICES

In this section, you are provided with an overview of all available services. With a double-click on the service, you have the possibility to edit your service.

2 THE [ADD]-BUTTON

Please click on this button in order to add a new service. Next, click on the **[Connection Profile]**-button. In the so opened window, please enter your settings and click on the **[Verify Connection & Save Profile]**-button in the right lower corner. For further information, please have a look at [CHAPTER 3.1, HOW TO ON PAGE 28](#).

3 THE [MANAGE]-BUTTON

Click here in order to modify the MS Dynamics 365 service and connection profile. Alternatively, you could double-click on the service you would like to modify. You will be provided with the details of your MS Dynamics 365 Online service and connection profile (please also see picture 7).



If a service is currently used by a DocumentsCorePack Service or AttachmentExtractor Configuration, you will only be allowed to change the user credentials. Also, you must select the same organization.

4 THE [DELETE]-BUTTON

If you do not need your Online service anymore, please click here in order to delete it. If you try to delete a service.

2 Advanced Online Configuration

Because there are two different products, there are as well two different advanced configuration options. In the course of this chapter, you will find the two different options explained in detail.

2.1 The Service Configuration Settings for DocumentsCorePack

Please find a detailed description on how to setup the service configuration in [CHAPTER ERROR! REFERENCE SOURCE NOT FOUND., ERROR! REFERENCE SOURCE NOT FOUND. ON PAGE FEHLER! TEXTMARKE NICHT DEFINIERT..](#) This chapter explains the general service configuration.

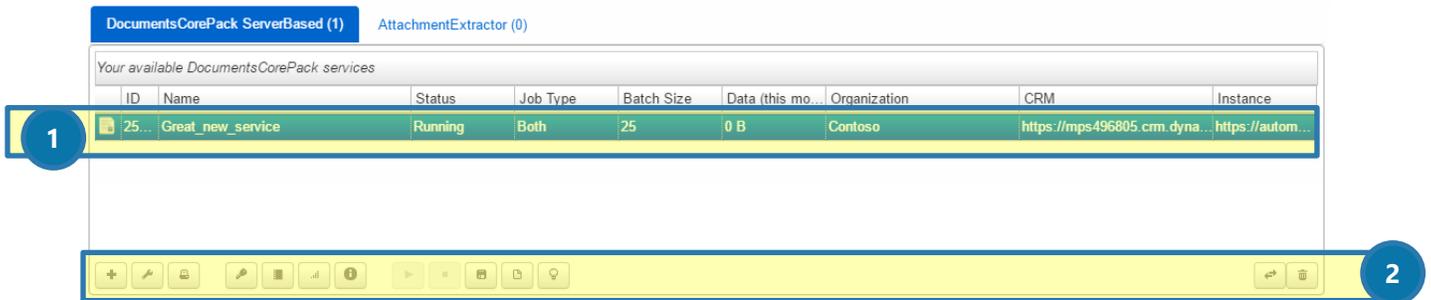


Figure 5 DCP Service Configuration Settings

1 SERVICE CONFIGURATION

This section provides you with an overview of your configured DocumentsCorePack Services. With a double-click on the configuration, you get the possibility to edit the service.

2 SERVICE CONFIGURATION BUTTONS

The buttons described here enable you to configure and modify your service. In order to do so, a service has to be selected previously.

There are certain functionalities that can be only applied to AttachmentExtractor and others, that can be only applied to DocumentsCorePack. In the course of this chapter, you will find a detailed description to the different functionalities.

2.1.1 The DocumentsCorePack Configuration buttons

DocumentsCorePack Online Services can be configured in many different ways. Below, you will find a short description of how to configure these buttons.



Figure 6 DCP Settings

1 ADD A NEW DOCUMENTSCOREPACK SERVICE OR MODIFY AN EXISTING ONE

Simply click on the **[Add]**-button (+) in order to create a new DocumentsCorePack Service.



One user can only be added to one service, for example: If user A has a service for one organization, user B cannot be added to the same organization.

Please click on the **[Configure Service]**-button (monkey wrench) in order to modify the DocumentsCorePack Service settings. A double-click on the service you would like to modify has the same effect.

2 GOOGLE CLOUD PRINTING (OPTIONAL)

Once you have created a service, the printing options can be specified here. Please make sure that you have already configured your Google Cloud Printers previously.

3 VIEW LICENSE

If you click here, you will be provided with an overview of the installed license.

License

Server Based License Client Based License

DCP Server Based Subscription ID: -1. Please click here to change the subscription ID

Licenseinfo for DocumentsCorePack Server Based generation for MS CRM Online

Licenseinformation	Systemvalue	Status
Licensemodel		!
Licensekey (Trial)		!

Licenseinformation	Systemvalue	Status
BusinessUnit	org8005ccf5	✓
Number of site licenses	1	✓
Licenses for Readonly Users	0	✓
Expiration	7/10/2017 1:46:02 PM (4 days left)	!
Support		✓
Issued product	DocumentsCorePack Server Based generation	✓
Version upgrade covered till	1/1/0001 12:00:00 AM	✓

Licenseinformation	Systemvalue	Status
LicenseState	trial	!

Install License Close

Figure 7 Licenseinfo for DocumentsCorePack

4 VIEW SERVICE LOGS

A click on this button enables you to see the service logs, as well as the processed documents and failures. If the service cannot be started, you will find the reason within these log-entries. A double-click on a certain row will open the Service Log Details.

Service Logs

Here you can see the latest 250 event log entries of your service Great_new_service. Double-click the row to see details

Select the instance where to read the logs US West 2

Time	Message
2017-03-20 03:21:37	33602_Great_new_service WriteServiceL
2017-03-20 02:21:39	33602_Great_new_service batch report T
2017-03-20 02:21:39	33602_Great_new_service entering idle lo
2017-03-20 02:21:24	33602_Great_new_service RegMon onpre
2017-03-20 02:21:24	33602_Great_new_service RegMon has s
2017-03-20 02:21:24	33602_Great_new_service has started su
2017-03-20 02:21:24	Check for open working Items
2017-03-20 02:21:23	33602_Great_new_service WriteServiceL
2017-03-20 02:21:01	AutoMergeService has requested a shutd
2017-03-20 02:21:01	AutoMergeService has shutdown all subp
2017-03-20 01:33:53	33602_Great_new_service WriteServiceL
2017-03-20 00:33:37	33602_Great_new_service WriteServiceL
2017-03-19 23:33:19	33602_Great_new_service WriteServiceL
2017-03-19 22:32:57	33602_Great_new_service WriteServiceL
2017-03-19 21:32:40	33602_Great_new_service WriteServiceL
2017-03-19 20:32:25	33602_Great_new_service WriteServiceL
2017-03-19 19:32:11	33602_Great_new_service WriteServiceL
2017-03-19 18:31:57	33602_Great_new_service WriteServiceL
2017-03-19 17:31:36	33602_Great_new_service WriteServiceL

Service Log Detail

33602_Great_new_service batch report

TotalDocuments since service started : 0
 ProcessedBytes since service started : 1

-----RUNTIME SUMMARY-----

BatchRunTimes :
 Document Batch: 1 items, min: 15139ms , max: 15139ms ,
 avg : 15139ms
 TotalRuntime: 15139.4514

QueryRuntimes :
 Retrieve Documents to generate: 1 items, min: 1495fms ,
 max: 1495fms ; avg : 1495fms
 TotalRuntime: 1495f.9396

DocumentRuntimes :
 TotalRuntime: 0

Document Success Runtimes :
 TotalRuntime: 0

Document Error Runtimes :
 TotalRuntime: 0

Close

Figure 8 Service logs for DocumentsCorePack

5 VIEW DOC STATISTICS

Here, you can have a look at the statistical data related to the documents created with the DocumentsCorePack Online Service.

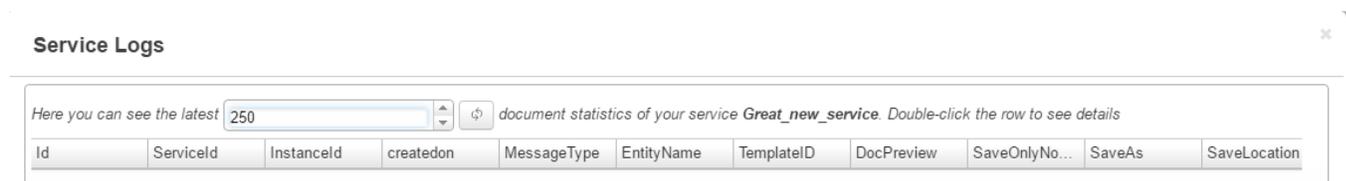


Figure 9 Documents Statistics for DocumentsCorePack

6 VIEW VERSION INFO

A click on this button opens the *Version Information* window. Here, you get an overview on your currently installed solution versions. With a click on the **[Reinstall/Upgrade]**-button, you can as well upgrade your solution to the latest version.

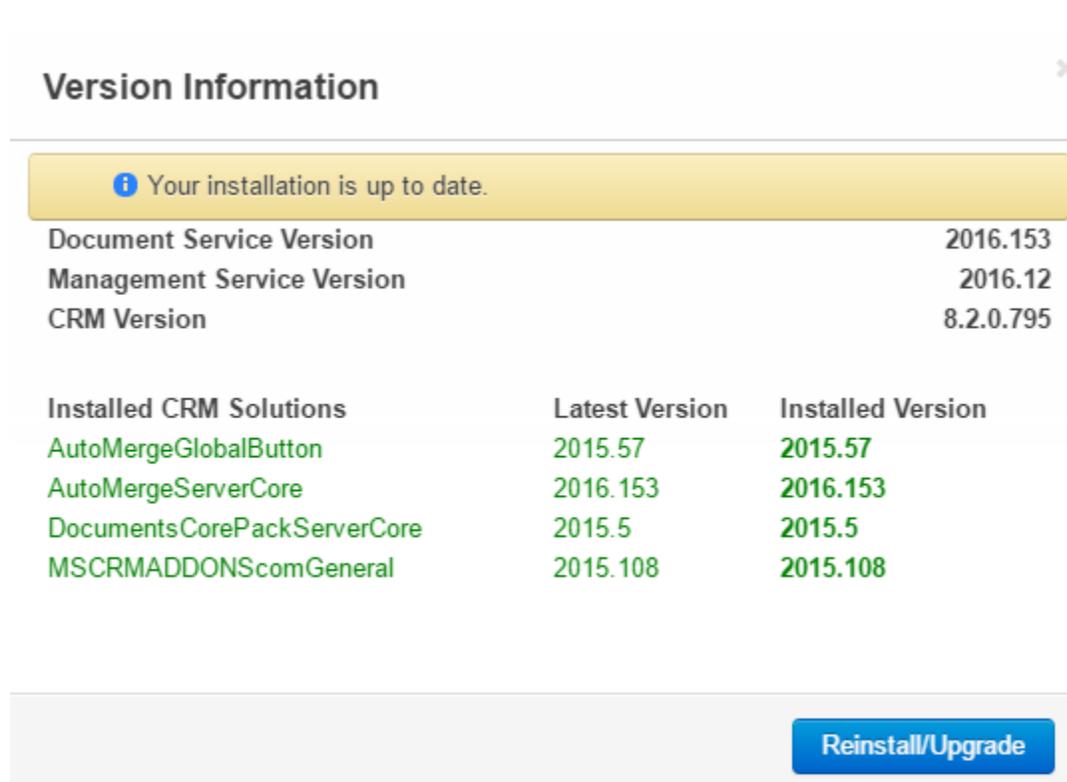


Figure 10 Version Information window

7 START AND STOP THE SERVICE

Click on the **[Play]**-button in order to start the service.



Usually, there is no need to start the DocumentsCorePack Online Service, because the service is running automatically, once it has been configured.

Click on the **[Stop]**-button (square) in order to stop the service.

8 VIEW DATA USAGE REPORT

A click on this button opens the data usage report, which provides you with your monthly used data volume.

9 IMPORT/EXPORT DCP TEMPLATES

A click on this button opens the Template Management window. Using this window, you can import and export DocumentsCorePack templates and upload fonts.

Template Management ✕

Export Templates

Click on "Export" to export all DocumentsCorePack Templates as a *.zip file.

Export

Import Templates

Click on "Import" to import DocumentsCorePack Templates. You can choose multiple *.docx/*.docm/*.dot templates or a *.zip file containing multiple templates. You can also drag and drop files from the explorer to this dialog.

Import

Install Fonts

If your templates are using fonts which are not default installed fonts, you have the possibility to upload & install your font into your DocumentsCorePack instance.

Upload Font

Close

Figure 11 Template Management window

DCP and AE Online Configuration for Microsoft Dynamics CRM 2015/2016 and Dynamics365

Click on the **[Export]**-button in order to export all DCP templates as *.zip-files.

Click on the **[Import]**-button if you would like to import DCP templates.

Here, you will be asked to specify how to proceed with the templates you import, but that already exist in the system. You have the possibility to select between the following three options:

- 1) Overwrite
The template GUID stays the same.
- 2) Import the new version
The 'old' version will be kept with the 'old' template GUID and the 'new' version of the template will be imported with a 'new' template GUID.
- 3) Ignore
All existing templates will be ignored. Only new templates will be imported.

Files can also be dragged and dropped from the Explorer to this dialog. Furthermore, if your templates are using fonts which are not installed by default, you may upload and install your fonts into your DCP instance with a click on the **[Upload Font]**-button.



Template Designer must generally be activated per user. Please find a brief description on how to do so in [CHAPTER 3.2, HOW TO ACTIVATE TEMPLATE DESIGNERS \(PER USER\) FOR DCP ONLINE ON PAGE 34.](#)

10 WORKINGITEM MANAGEMENT

Click on this button in order to open the WorkingItem Management. Here, you can export or disable working items as well as export disabled working items.

WorkingItem Management

Export active WorkingItems

Click on "Export" to export all active WorkingItems.

Disable WorkingItems

Click on "Disable" to disable all active WorkingItems to clear the document generation queue.

Export disabled WorkingItems

Click on "Export" to export all manual disabled WorkingItems.

Figure 12 Working Item Management window

FURTHER BUTTONS

At the right bottom of the DCP services, you will find the following two buttons:



Figure 13 DCP Settings

1 MOVE THE INSTANCE

With a click on this button, you can move the service to another instance. To do so, simply select a certain instance from the list and click on the **[Move Service]**-button. Alternatively, you can also copy the service. To do so, simply click on the **[Copy Service]**-button.

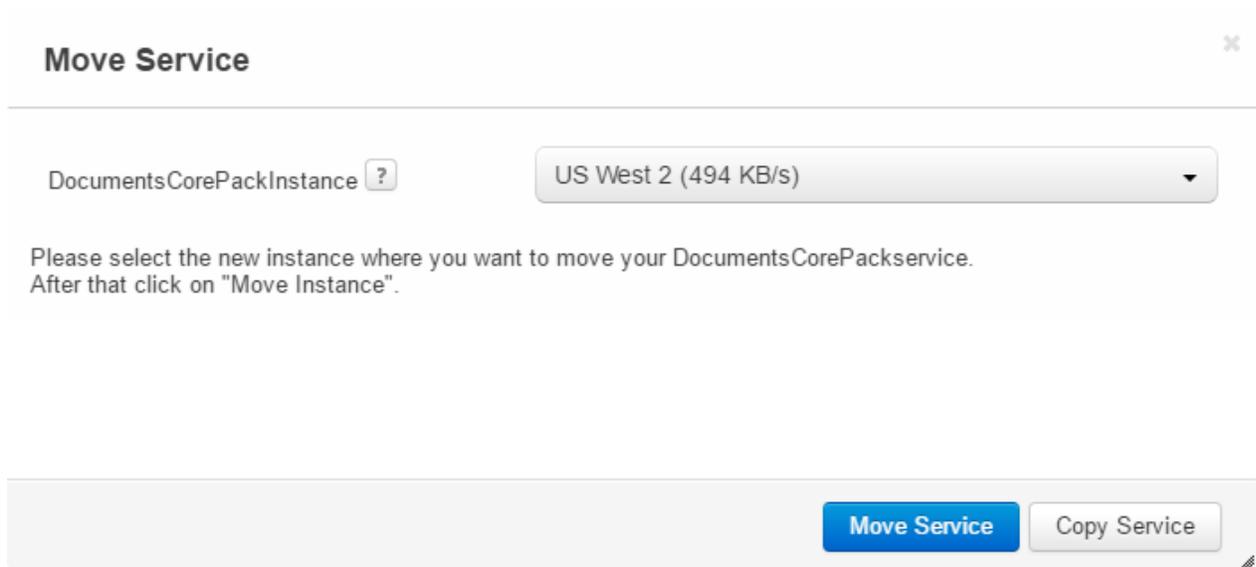


Figure 14 DocumentsCorePack Instance - Move Service

2 DELETE SERVICE

With a click on this button, you have the possibility to delete the service. Before the service is deleted, you will be provided with the *Delete Service*-window. Here, click on the **[Delete]**-button in order to delete the service or click on the **[Cancel]**-button in order to cancel.

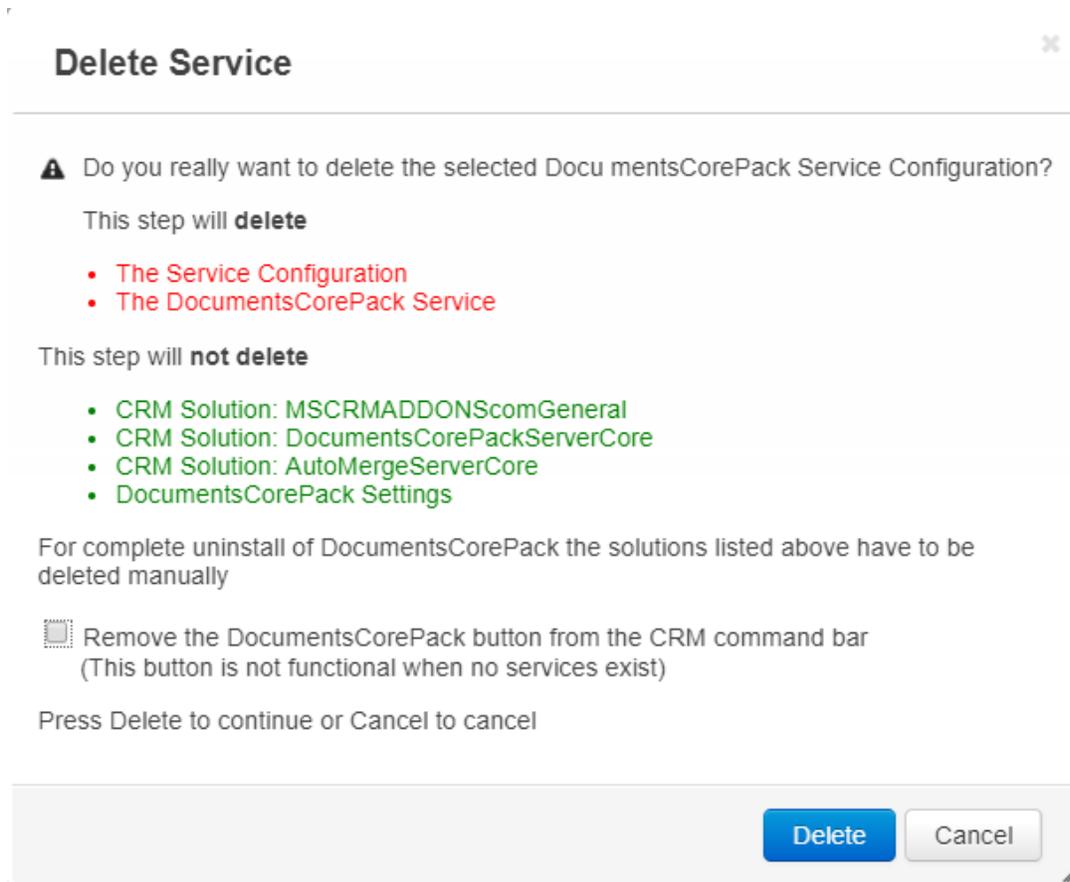


Figure 15 Delete Service window

2.1.2 The AttachmentExtractor Configuration buttons

AttachmentExtractor Online Services can be configured in many different ways. Below, you will find a short description of how to configure these buttons.



Figure 16 AttachmentExtractor Configuration buttons

1 ADD A NEW ATTACHMENTEXTRACTOR SERVICE OR MODIFY AN EXISTING ONE

Simply click on the **[Add]**-button (+) in order to create a new AttachmentExtractor Service.

Please click on the **[Configure Service]**-button (monkey wrench) in order to modify the DocumentsCorePack Service settings. A double click on the service you would like to modify has the same effect.

2 LICENSE VIEWER

If you click here, you will be provided with an overview of the installed license.

3 VIEW SERVICE LOGS

A click on this button enables you to see the service logs, as well as the processed documents and failures. If the service cannot be started, you will find the reason within these log-entries. A double-click on a certain row will open the Service Log Details.

4 VIEW VERSION INFO

A click on this button opens the *Version Information* window. Here, you get an overview on your currently installed solution versions. With a click on the **[Reinstall/Upgrade]**-button, you can as well upgrade your solution to the latest version.

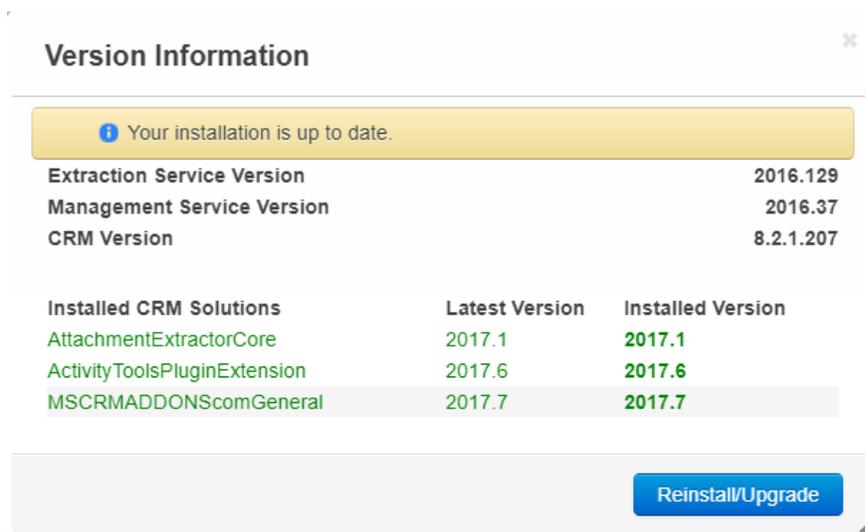


Figure 17 Version Information

5 START THE SERVICE

Click on the **[Start]**-button in order to start the service.



The service does not start automatically.

6 STOP THE SERVICE

Click on the **[Stop]**-button in order to stop the service.

7 VIEW PROGRESS AND HISTORY

Click on this button in order to see the notes, e-Mails and attachments, that have been processed previously. Furthermore, you will be provided with information regarding the already transferred data and the range of processed notes/e-Mails.

8 RESET EXTRACTION

A click on this button resets the whole extraction progress for the current organization. Handle this button with care, because you cannot revert this action.

9 MOVE SERVICE

A click on this button enables you to move the service to another instance.

10 DELETE THE SERVICE

With a click on this button, you have the possibility to delete the service. Before the service is deleted, you will be provided with the *Delete Service*-window. Here, click on the **[Delete]**-button in order to delete the service or click on the **[Cancel]**-button in order to cancel.

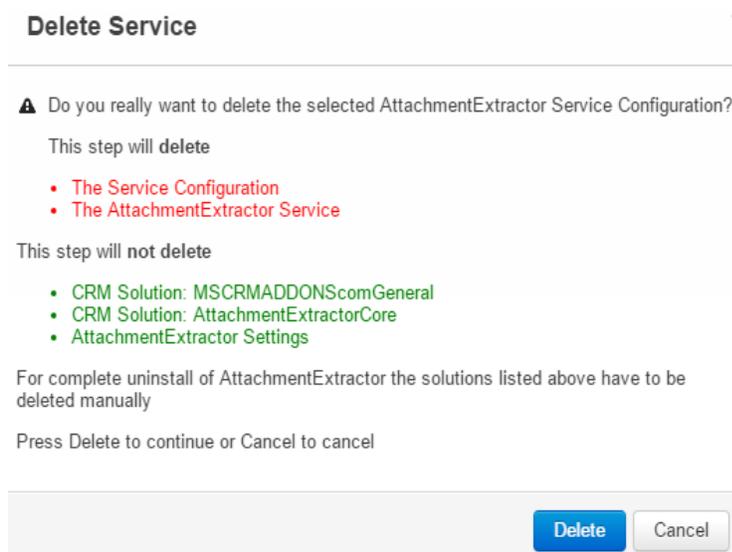


Figure 18 Delete AE Service window

2.2 The DocumentsCorePack Service Configuration surface

The DCP Online Service Configuration service helps you to create a new service. The surface is divided into two different parts – the basic and the advanced options.

2.2.1 The basic DocumentsCorePack configuration options

Using this section, you can configure the basic options of your service. In general, setting the basic options is enough to start a service.

Figure8_DCP_online_service

Figure 19 Create new DocumentsCorePack Service

1 SET UP YOUR CRM CONNECTION

Please click on the **[Connection Profile]**-button in order to setup your connection profile. For further information on how to setup a connection profile, please have a look at [CHAPTER 3, STEP 2: SETUP A CONNECTION PROFILE ON PAGE 289](#).

2 SERVICE NAME

Please enter your service name here. But choose wise, because the name cannot be changed anymore! After you establish a Connection Profile, the default of the Service Name is the unique organization name.

3 DOCUMENTSCOREPACK INSTANCE

Please select here, on which instance the DocumentsCorePack Service should run. The instance with the highest bandwidth is automatically selected for you.

4 BATCH SIZE

Please specify here, how often the service should run before entering idle loop. This behavior ensures that the CPU load is limited.

5 CATEGORY

The number set here enables you to prioritize your service. This is required, when you use more than one service. The default setting is 0.

6 JOB TYPE

Specify here which jobs should be processed by the service. Print Jobs, Document Generation jobs or both are selectable. When selecting Print Jobs only, you can apply a filter.

7 USE CRM INTEGRATED SHAREPOINT

Enable this setting when the document should be stored in the CRM integrated SharePoint. Otherwise, the documents will be saved as attachments and notes. Please notice that the CRM integrated SharePoint has to be configured for this step!

8 SHOW ADVANCED OPTIONS

A click on this button expands some options for the advanced configuration.



If you feel that the configuration so far satisfies your needs, you can save your service now with a click on the **[Save Service]**-button in the right lower corner. But of course, the service can as well be configured on an advanced level, which can be done in the Advanced Configuration-section. This optional part of the configuration will be explained in the next chapter.

2.2.2 The advanced DocumentsCorePack configuration options

Using this section, you can configure the advanced options of your service.



The advanced configuration options are optional.

1	Enable Debugging <input type="checkbox"/>	
	Notify on service changes <input type="checkbox"/>	2
3	Skip solution import <input type="checkbox"/>	
	Skip role assignment <input type="checkbox"/>	4
5	Force this service to be the only document-generating service <input type="checkbox"/>	
	Server Version <input type="text"/>	6
7	Azure Service Name Setting <input type="text"/>	

2016.153

[View Setting](#)

Figure 20 Advanced DocumentsCorePack Configuration Options

1 ENABLE DEBUGGING

In case of any issues, we would recommend you to enable debugging here. The log files will be available as soon as the service is saved.



It is not recommended to activate debugging per default, because activating debugging effects the performance.

2 NOTIFY ON SERVICE CHANGES

Select this option if you want to receive an e-Mail every time there is a service change.

3 SKIP SOLUTION IMPORT

If you select this option, the setup will assume that you have already imported all solutions that are necessary for the creation of a service. If a particular solution is missing, the creation of the new service will fail.

4 SKIP ROLE ASSIGNMENT

If you select this option, you will either have to create a custom role that covers the required rights or you must assign the security roles manually.

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5 FORCE THE SERVICE TO BE THE ONLY DOCUMENT-GENERATING SERVICE

IF you select this option, this service will be the only one to process your documents.

6 SERVER VERSION

This field informs you about the current DocumentsCorePack version on your instance.

7 AZURE SERVICE NAME SETTING

Click on the **[View Setting]**-button in order to see the configured *AzureServiceName*-setting here.

2.3 The AttachmentExtractor Service Configuration surface

The AE Online Service Configuration service helps you to create a new service. The surface is divided into two different parts – the basic and the advanced options.

2.3.1 The basic AttachmentExtractor configuration options

Using this section, you can configure the basic options of your service. In general, setting the basic options is enough to start a service.

Create new AttachmentExtractor Service

1 Set up your CRM connection Connection Profile

2 Service Name (cannot be changed) This must be a unique service name ✓
AttachmentExtractor Instance AE AUSTRALIA

3 SharePoint Integration CRM Integrated SharePoint Specific SharePoint
Storage Option for Entities without Document Management enabled Specific SharePoint Library Do not extract
SharePoint Credentials Username someone@example.com Password

4 Extract Email Attachments, Note Attachments
Email Subfolder (max. 14 chars, letters and numbers only)
Note Subfolder (max. 14 chars, letters and numbers only)

5 Data Processing Copy - Keep data in CRM Extract - Replace data in CRM

6 Minimum Attachment Size Filter 64 kb

7 Only extract attachments older than 1 hours

8 Show Advanced Options

Save Service

Figure 21 Create new AttachmentExtractor Online Service

1 SET UP YOUR CRM CONNECTION

Please click on the **[Connection Profile]**-button in order to setup your connection profile. For further information on how to setup a connection profile, please have a look at [CHAPTER 3, STEP 2: SETUP A CONNECTION PROFILE ON PAGE 289](#).

2 SERVICE NAME

Please enter your service name here. But choose wise, because the name cannot be changed anymore!

ATTACHMENTEXTRACTOR INSTANCE

Please select here, on which instance the AttachmentExtractor Service should run. The instance with the highest bandwidth is automatically selected for you.

3 SHAREPOINT INTEGRATION

Please choose, if you would like to use the CRM integrated SharePoint or a specific SharePoint. If you want to use a specific SharePoint, you must enter a SharePoint path, which means you must enter a SharePoint URL that includes the library.

STORAGE OPTION FOR ENTITIES WITHOUT DOCUMENT MANAGEMENT ENABLED

Entities without document management may be stored daily or weekly on a specific SP library. Else, you may decide which entities not to extract. Also, attachments without regarding will be extracted to this library.

SHAREPOINT CREDENTIALS

Please insert the credentials of a SharePoint user with administrative access to your configured SharePoint here.

4 EXTRACT

Using the drop-down menu of this option, allows you to decide what you would like to extract with AttachmentExtractor. Please select all options or only some of these options. The available options are:

- EMAIL ATTACHMENTS
- NOTE ATTACHMENTS
- EMAIL BODY
- NOTE BODY



This section also allows you to configure an e-Mail or note subfolder, where your extracted emails or notes will be saved.

5 DATA PROCESSING

Please specify if you only want to copy your attachments to SharePoint or if you want to extract them completely. Once extracted files will be replaced with a .url file which points to the extracted file on SharePoint. However, if you click on the **[Extract – Replace data in CRM]**-button, you will receive a warning.



Read the warning carefully, check the corresponding checkbox and select whether you want to copy or extract the files by clicking on the corresponding button.

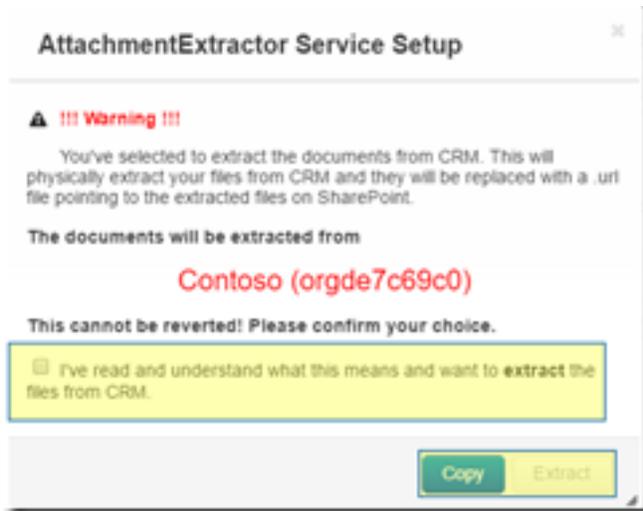


Figure 22 AttachmentExtractor Online Service Setup warning

6 MINIMUM ATTACHMENT SIZE FILTER

Please insert the minimum size a file should have in order to be extracted by your AttachmentExtractor Service here.

7 ONLY EXTRACT ATTACHMENTS OLDER THAN

If you only want to extract attachments older than a certain amount of time, you can specify this here.

8 SHOW ADVANCED OPTIONS

A click on this button expands some options for the advanced configuration.



If you feel that the configuration so far satisfies your needs, you can save your service now with a click on the **[Save Service]**-button in the right lower corner. But of course, the service can as well be configured on an advanced level, which can be done in the Advanced Configuration-section. This optional part of the configuration will be explained in the next chapter.

2.3.2 The advanced AttachmentExtractor configuration options

Using this section, you can configure the advanced options of your service.



The advanced configuration options are optional.

Figure 23 Advanced AE Configuration Options

1 ENABLE DEBUGGING

In case of any issues during the extraction, we would recommend you to enable debugging by selecting this option. The log files will be available for download as soon as the service is saved.

2 STOP SERVICE ON CRITICAL ERRORS

If you select this option, the service will automatically stop if a critical error occurs. This option is activated by default.

3 CREATE SHAREPOINT ATTRIBUTES

Enabling this option will create SharePoint attributes for transferred files.

4 NEW FOLDER PER

Please select if new folders should be created on a weekly or a daily basis here. This option only applies to CRM Integrated SharePoint.

5 BLACKLIST OR WHITELIST

Please decide whether you would like to use a black- or a whitelist here. Entities on the blacklist will NOT be extracted, while entities on the whitelist will be extracted.

6 NOTIFY ON SERVICE CHANGES

Select this option in order to get an eMail every time there is a service change.

7 SKIP SOLUTION IMPORT

If you select this option, the setup will assume that you have already imported all solutions that are necessary for the creation of an AttachmentExtractor service. If any solution is missing, the creation of the new service will fail.

8 SKIP ROLE ASSIGNMENT

If you select this option, you will either have to create a custom role covering the required rights or you will have to manually assign the security roles.

9 SERVER VERSION

This field informs you about the current AttachmentExtractor version on your instance.

3 Tutorials (“How To’s”)

This chapter provides you with helpful tutorials that show you how to work with the Online Configuration efficiently.

3.1 How to setup a service in general

An MS Dynamics 365 Online Service consists of two parts. First of all, a connection to MS Dynamics 365 must be established via the CRM Connection Profile, which is required to connect Microsoft Dynamics 365 Online with your Microsoft Dynamics 365 organization. The needed steps are the same for AttachmentExtractor and DocumentsCorePack.

Once you have setup your connection, you are ready to set up a DocumentsCorePack or an AttachmentExtractor Service.

3.1.1 Step 1: Open the Online Configuration Service

Please follow the steps in [CHAPTER 1.1, HOW TO START THE ONLINE CONFIGURATION ON PAGE 5](#) in order to open the Online Configuration properly. After you have hit the **[Add]**-button, follow the below instructions.

3.1.2 Step 2: Setup a connection profile

In the so opened overview, please click on the **[Connection Profile]**-button.

The screenshot shows a web-based configuration window titled "Create new DocumentsCorePack Service". The window contains a form with the following fields and controls:

- Service Name (cannot be changed):** A text input field containing "org8005ccf5" with a checkmark icon on the right.
- DocumentsCorePack Instance:** A dropdown menu showing "EU North Public 2015 (24.39 MB/s)".
- Batch Size:** A numeric input field with "25" and up/down arrow icons.
- Category:** A numeric input field with "0" and up/down arrow icons.
- Job Type:** A button with "Both" selected, and other buttons for "Print Jobs" and "Document Generation".
- Use CRM integrated SharePoint:** A checkbox that is currently unchecked.
- Show Advanced Options:** A button located at the bottom left of the form area.
- Save Service:** A blue button located at the bottom right of the window.
- Connection Profile:** A button highlighted with a yellow box in the top right corner of the form area.

Figure 24 Create a new DCP Service

DCP and AE Online Configuration for Microsoft Dynamics CRM 2015/2016 and Dynamics365

Next, the below window appears. Here, you may select:

- your Microsoft Dynamics 365 type **1**: Server2Server, Office 365, Live ID or IFD (hosted) and
- type in your CRM URL **2** and your
- user credentials **3** (in that case your username and your password).

To finish the process, click on the **[Retrieve Organizations]**-button **4**.

Create CRM connection profile

1 You have to specify a valid CRM connection profile. The user with which you're connecting must be in the system administrator role to set up a service.

Select your CRM Type **1** Online - Server2Server **Online - Office 365** Online - Live ID IFD (hosted)

CRM URL **2** https://bcodospan2.crm4.dynamics.com

Credentials - You need to specify administrative user credentials

Username **3** admin@bcodospan2.onmicrosoft.com Password

4 Retrieve Organizations

Figure 25 Create CRM connection profile

3.1.3 Step 3: Verify your connection

As soon as your organization appears in the Available Organizations section **1**, click on the **[Verify Connection & Save Profile]**-button **2**.

Friendly name	Unique name	Service URL
bcodospan2	org8005ccf5	bcodospan2

Figure 26 Verify the connection and save your profile

Now, the following message appears.

Verify connectivity and permissions

Please DO NOT close this window or navigate away!!!

- Check connectivity...
- Check permissions...
- Save CRM connection profile...

Figure 27 Verifying connectivity and permissions



It is of utmost importance that you do not close this window or navigate away. It can take a few minutes to verify the connection – so have a little break and enjoy some coffee or tea.

3.1.4 Step 4: Configure your service

Next, you must configure the corresponding service. This must be done in the *Create new DocumentsCorePack Service*-window or the *Create new AttachmentExtractor Services*-window, depending on the product you have selected previously. After you have configured your connection profile, you will be navigated to this window automatically. Please have a look at the following chapters in order to learn more about how to create a service.

3.1.5 Step 5: Configure the basic steps

In the DocumentsCorePack Service Configuration window, you have the possibility to create a new service. Please have a look at [CHAPTER 2.2.1, THE BASIC DOCUMENTSCOREPACK CONFIGURATION OPTIONS ON PAGE 19](#) for detailed information on how to configure this setting.



If you feel that the configuration so far satisfies your needs, you can save your service now with a click on the **[Save Service]**-button in the right lower corner and proceed with Step 3.

3.1.6 Step 2: Set the Advanced Options (optional)

Of course, the service can as well be configured on an advanced level, which can be done in the Advanced Configuration-section. This optional part of the configuration is explained in detail in [CHAPTER 2.2.2, THE ADVANCED DOCUMENTSCOREPACK CONFIGURATION OPTIONS ON PAGE 21](#).

3.1.7 Step 6: Save your service

No matter how detailed you have configured your service, please click on the **[Save Service]**-button in the right lower corner in order to proceed. Click on the **[OK]**-button in the window that appears now. The same window also appears if you use AttachmentExtractor (but with the product name changed).

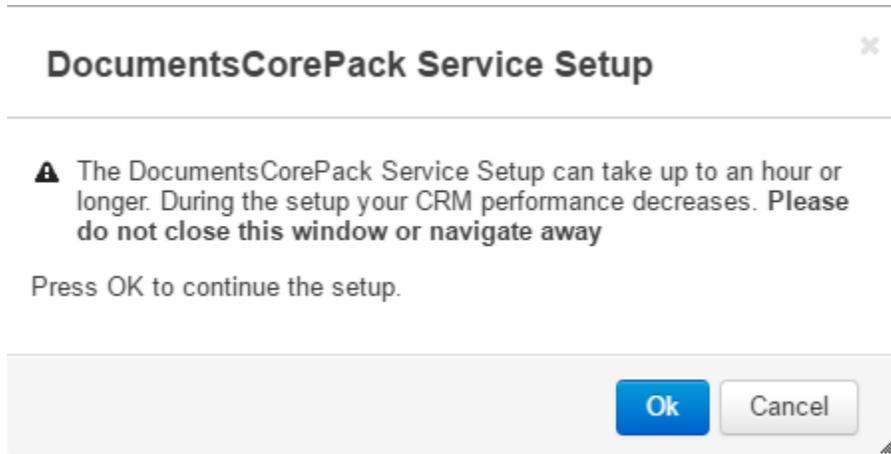


Figure 28 DocumentsCorePack Service Setup



Do not close the following window or navigate away as long as the service is saved. Instead, have a break and enjoy some coffee or tea. The following screenshot shows DocumentsCorePack only, but it would be the same for AttachmentExtractor.

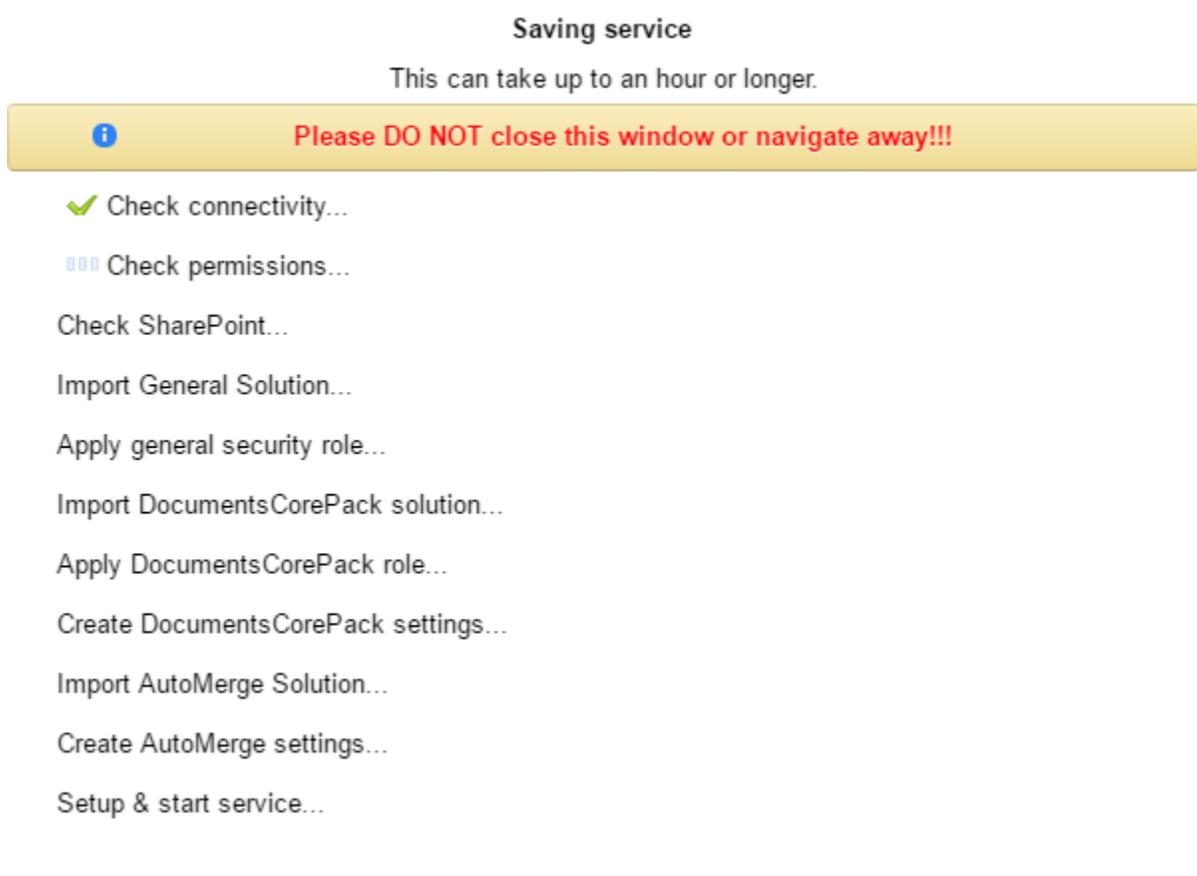


Figure 29 Saving the service

3.1.8 Step 7: Service Configuration Completed

As soon as the service configuration is completed, you will be informed about the next steps you can take.

3.1.9 Step 8: Watch your service running

Congratulation! You have finished the configuration of your service. You are now redirected to the service configuration overview. Other than AttachmentExtractor, the DocumentsCorePack service is already running. Using the buttons at the end of the service overview, you can define which steps you would like to take next. Please find a brief description of the DocumentsCorePack buttons in [CHAPTER 2.1.1, THE DOCUMENTSCOREPACK CONFIGURATION BUTTONS ON PAGE 10](#). Please find a brief description of the AttachmentExtractor buttons in [CHAPTER 2.1.2 THE ATTACHMENTEXTRACTOR CONFIGURATION BUTTONS, ON PAGE 17](#).

3.2 How to activate Template Designers (per user) for DCP Online

Template Designers must generally be activated per user before you can use it.

3.2.1 Step 1: Select a service

Please login to our website [www.msrm-addons.com /Login](http://www.msrm-addons.com/Login) and navigate to My Account Overview > My Cloud Services in order to activate the Template Designers per users for DocumentsCorePack Online. Select the desired service and click on the **[License]**-button.



Figure 30 Click on the **[License]**-button

3.2.2 Step 2: Select a user

To do so, please click on DocumentsCorePack Client and on the **[Please click here to select the user...]**-button.

License

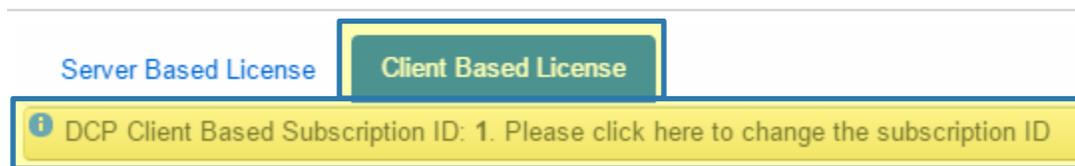


Figure 31 Select a user

Next, a dialog will open that allows you to select a certain user. Select your preferred user there and click on the **[Apply]**-button in order to proceed.

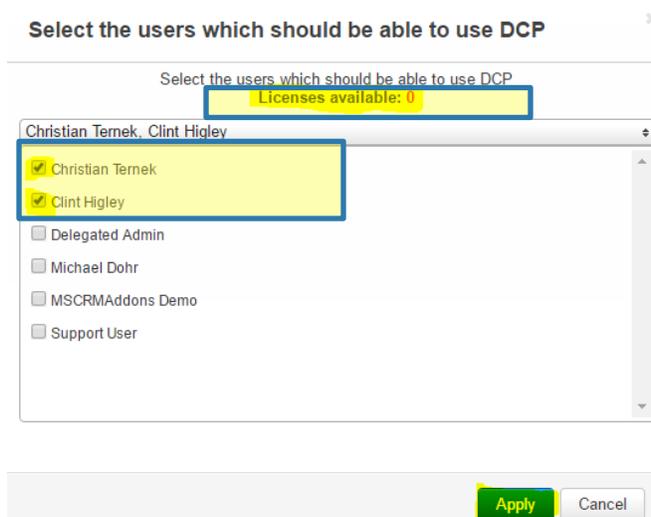


Figure 32 Select the users which should be able to use DCP



Do not activate more users than your license covers!

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5 Contact

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