

DocumentsCorePack Template Designer Installation Guide

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Preamble



This documentation is intended to guide you through the installation of DocumentsCorePack Template Designer in Microsoft Dynamics 365.

Please read this document carefully and follow the steps as described to achieve the results.

Target Audience

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

• Maintaining and configuring a Microsoft Dynamics 365

The installation consists of the following steps (follow each of the steps to complete the installation):

- Installing DocumentsCorePack Template Designer for Microsoft Dynamics 365
- Configuring DocumentsCorePack Template Designer for Microsoft Dynamics 365

Prerequisites

Microsoft .NET Framework 4.5 RTM is required.

One of the following versions of Microsoft Dynamics 365 must be available:

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

Window Identify Foundation: The Window Identify Foundation is included in the setup and will be installed as part of the DocumentsCorePack Server Installation.

Supported Operating Systems

- Windows 8 32/64bit
- Windows 8.1 32/64bit
- Windows 10 32/64bit
- Windows 11

Supported Word Versions

- Word 2010 32/64bit
- Word 2013 32/64bit
- Word 2016 32/64bit
- Word 2019 32/64bit
- Microsoft/Office 365



1. How to install DocumentsCorePack Template Designer?

You can install the DocumentsCorePack Template Designer on every supported operating system which is able to connect to your Dynamics 365 instance. During the installation, you must specify at least one organization where the DocumentsCorePack Template Designer will be connected to.

Additional connections can be defined once the setup is completed.

1.1. Prerequisites

Before proceeding with the installation, it is necessary to <u>download</u> the DocumentsCorePack Template Designer. Be aware that DocumentsCorePack should already be running in your environment. There are two options for accessing it:

Online Service: You can sign up for DocumentsCorePack as an online service on our <u>website</u>. This allows you to use the application directly through your web browser without local installation.

On-Premise Service: Alternatively, you can install DocumentsCorePack as an on-premise service.



2. Installation DocumentsCorePack Template Designer

Please note: Important before installing the components:

- Close all Office products (MS Word, MS Outlook...)
- Be sure that the machine is online to the Dynamics 365 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. Find the download file <u>here</u>.

2.1. Install the component on the Template Designer

Run the **DocumentsCorePack Template Designer for MS Dynamics 365.exe** setup file. Hit in this window the **Next** button to continue with the license agreement.



Figure 1: Installer DCP TemplateDesigner for Dynamics 365



2.2. End User License Agreement (EULA)

Please accept the license agreement by checking the checkbox and click on the **Next** button.

🖟 DocumentsCorePack Client for Dyna	mics 365		×
License Agreement Please read the following license agreen carefully.	nent	DocumentsCore	ddons.com Pack for Dynamics 365
FORM OF END US	ER LICENSE AG	REEMENT	^
MSCRM-ADDONS.COM SOFTV	VARE LICENS	SE AGREEMEN	п
IMPORTANT: THIS SOFTWARE AGREEMENT") IS A LEGAL AGRE MSCRM-ADDONS.COM. READ IT SOFTWARE. IT PROVIDES A LIC CONTAINS WARRANTY INFORM	EMENT BETW CAREFULLY CENSE TO US	EEN CLIENT A BEFORE USING THE SOFTW	ND G THE ARE AND
• I accept the terms in the license agreem	ent		Print
O I do not accept the terms in the license a InstallShield	agreement		
	< Back	Next >	Cancel

Figure 2: End User License Agreement (EULA)



2.3. Destination Folder

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

B DocumentsCorePack Client for Dynamics 365	×
Destination Folder Click Next to install to this folder, or click Change to install to a different folder.	Addons.com
Install DocumentsCorePack Client for Dynamics 365 to: C:\Program Files (x86)\PTM EDV-Systeme GmbH\Documents Core Pack Client for Dynamics 365\	Change
InstallShield	
< Back Next >	Cancel

Figure 3: Destination folder



2.4. Confirm the installation

Click on the **1** Install button to begin the installation as you can see in the figure below.

The **2 Back** button allows you to go back to e.g., change the installation folder.

👷 DocumentsCorePack Client for Dynamics 365	×
Ready to Install the Program The wizard is ready to begin installation.	addons.com rePack for Dynamics 365
Click Install to begin the installation.	
If you want to review or change any of your installation settings, click Back exit the wizard.	. Click Cancel to
InstallShield 2 1	
< Back Install	Cancel

Figure 4: Install the program or go back



DocumentsCorePack TemplateDesigner is installing.

🖟 Documer	ntsCorePack Client for Dyna	mics 365		_		\times
	DocumentsCorePack Clien ram features you selected are		Docume	rm-ad	dons. k for Dyna	COM mics 365
12	Please wait while the InstallSh for Dynamics 365. This may to			sCorePack	Client	
	Status:					
InstallShield —						
		< Back	Next :	>	Cance	el

Figure 5: DCP Template Designer is installing

2.4.1. The "www.mscrm-addons.com"-tab

Once having finished the installation, go to your MS Word and you will see the **www.mscrmaddons.com**-tab on the ribbon. It contains several options, like create a template with the **Insert MailMerge Fields** option or send the document as a .pdf. For more information have a look in the <u>User Guide</u>.

File Home Insert I	Draw Design Layout	References	Mailings Rev	view View Dev	veloper	Help www.mscrm	-addons.com
 Open Template Save Template Insert MailMerge Fields 	Choose Send as Save as Data PDF > DOCX >	Template Explorer	태 Map Chart 값 Import Chart	Documents Core Pack Settings	? Help	Open LOG Folder Delete LOG Files Open latest ~	← ⑦ Manage Connections CRM168820 ⑦ New Connection
Templates	Get Data	Explorer	Charts	Settings	Help	Debug	Environments

Figure 6: The www.mscrm-addons.com tab

2.4.2. Reinstall/Upgrade

With this button you can upgrade your solution to the latest version.



2.4.3. License Manager

If you are using the DocumentsCorePack Template Designer for DocumentsCorePack or using the DocumentsCorePack Template Designer with a per-user license, you might see the following message: **accessDenied**. This indicates that the user does not have a license applied.

If the per User license count is higher than the system value number, you can claim a license yourself by using the **Claim License** button at the bottom right corner. This option is only visible if you have a per User license. For any other license type, this option will not be available. Learn <u>more</u> about how to claim a license.



3. Installation on a Terminal Server/Windows Server

To install DocumentsCorePack on a terminal server, you have to open the Control Panel and then the **Programs** option. Now click on **Programs and Features** option and on the left side select **Install a program from the network** and select the DocumentsCorePack Setup file. The Installation wizard will help you through the installation (have a look at Chapter 2).

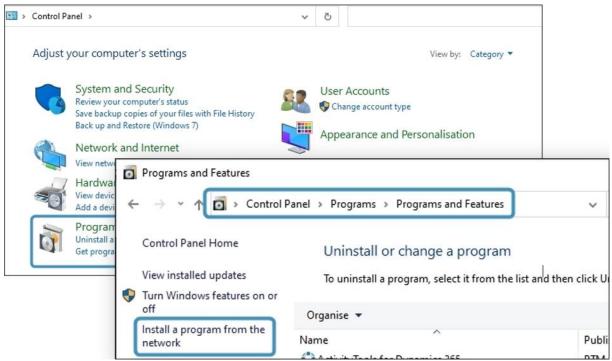


Figure 7: Contol Panel – Programs – Programs and Features – Install program from the network.



4. Installation on a Terminal Server from Dynamics 365 Online

When installing DocumentsCorePack on a terminal server for Dynamics 365 Online, you have to provide your Login Credentials for the initial installation. Enter a valid Username, and Password (see Figure 13).

Logon information										
Please specify you	r connection details t	365 Connection o connect to Dynamic system administrator	s 365. If you do n	ot know the						
Dynamics 365 Conne	ection Advanced Setting	s Log								
Existing Profiles	Existing Profiles [HKLM] V Manage New									
Select your Dynam	iics 365 Type									
OnPremise	○ IFD/Hoste	d 🔿 Online		opAccess						
Dynamics 365 Serv	er-Url:									
http://				*						
-Authenticated as:										
	dentials Integrated Secu	rity (PTM-FDV)								
Username	_	omain	Password							
Organization info	rmation:	Retrieve all]							
Friendly name	Unique name	ServiceURL								
				OK Cancel						

Figure 8: Provide Login credentials for initial installation

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.



1. Open the Registry Editor

РТМ	EDV Sy	steme (GmbH(0365)			
All	Work	Apps	Documents	Web	More 🔻	
Best ma	atch					
	Reg istry _{App}	Editor				
Setting	s					Registry Editor
	gion set	-			>	Арр

Figure 9: Open Registry Editor

2. 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).

Please note: 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 perform the following modification for these registry keys.

ter\HKEY_CURRENT_USER\SOFTWARE\PTM EDV-Systeme\Doo	umentsCorePackclient2011		
Computer	Name	Туре	Data
HKEY_CLASSES_ROOT	ab (Default)	REG SZ	(value not set)
HKEY_CURRENT_USER	(ab) ActiveProfile	REG SZ	SOFTWARE\PTM EDV-Systeme\Profiles\2613A286-60F9-4657-B43
AppEvents	an AddDocuments	REG SZ	True
Console	AddDocuOutgoing	REG_SZ	true
Control Panel	ab AnalyzeTemplateBeforeSave	REG SZ	True
- Environment	AutoNewDoc	REG SZ	false
EUDC	ClosedLetterStatusReason	REG SZ	3
Keyboard Layout	DCPCreateCrmActivitySecurityRoleExists	REG DWORD	- 0x00000000 (0)
Network	10 DCPSecurityRoleExists	REG DWORD	0x00000000 (0)
Printers	ab debug	REG SZ	True
Remote	ab DefaultBrowser	REG SZ	Microsoft Edge
SOFTWARE	ab) defaulttype	REG SZ	account
Adobe	and docxIsDefaultTemplateType	REG SZ	true
AppDataLow	docxSaveSuccessfullMessage	REG SZ	False
Canon	ab DoNotUpdateFetchQuery	REG SZ	False
> Chromium	ab donotupdatemetadataautomatically	REG_SZ	True
Classes	ab DoNotUseDataprovider	REG_SZ	False
> Clients	ab dontShowAggregationSwitchWarning	REG_SZ	False
> Fortinet	ab dontshowdocxtemplatequestion	REG SZ	true
S Google	ab From	REG SZ	uuc.
> Hewlett-Packard	ab Jump ToField	REG SZ	True
> M Providers	ab language	REG SZ	en
> Microsoft	ab MarkAttributesTreelfUsed	REG SZ	False
> Mozilla	ab MaxResults	REG SZ	240
> Netscape	NotifyWhenMetadataChanged	REG_SZ REG SZ	True
> ODBC	OGSettings	REG_SZ REG_SZ	false
> Policies	OpenTemplateInNewWindow	REG_SZ	False
PTM EDV-Systeme	ab path	REG_SZ	C:\Program Files (x86)\PTM EDV-Systeme GmbH\Documents Cor
> AutoMergeserver	ab RecentProfiles		
DocumentsCorePackclient2011		REG_SZ	6DDE7630-2E1A-4F87-AF79-ACA3A72FC4A2 619BFE16-FDC2-43E9
UI-Settings	ab RemoveFilter	REG_SZ	False
> Profiles	888 ResultXMLPage	REG_DWORD	0x00000000 (0)
> TelephoneIntegrationclient2011	ab RetrieveAllRecords	REG_SZ	True
TelephoneIntegrationclient2011Backup	a SendAsPdfChecked	REG_SZ	False

Figure 10: Registry Editor - ActiveProfile



3. Next, select the correct profile and search for the **CrmUserName** key.

	AppEvents	(ab) CrmConnection Type	REG_SZ
	Console	ab CrmDiscoveryName	REG_SZ
and a second	Control Panel	(a) CrmDomain	REG_SZ
	invironment	CrmServerName	REG SZ
	UDC	ab CrmUseHttps	REG_SZ
	Ceyboard Layout	ab CrmUseIntegratedSecurity	REG SZ
	Aicrosoft	ab CrmUserName	REG_SZ
-	Vetwork	et CustomClientId	REG_SZ REG_SZ
	Printers	Description	REG_SZ REG_SZ
	Remote		
4	OFTWARE	DisableDefaultProxy	REG_SZ
2	Adobe AppDataLow	biscoveryCrmServiceUrl	REG_SZ
2	Canon	ab) Graph Tenantid	REG_SZ
2	Chromium	ab HttpsDiscovery	REG_SZ
~ ~	Classes	et isMSO365	REG_SZ
~	Clients	ab LastUpdateAdalCRM	REG_SZ
5	Fortinet	ab) LastUpdateAdalGlobalDisco	REG_SZ
	Google	ab) LastUpdateAdalSP	REG_SZ
5	Hewlett-Packard	ab) NLB	REG_SZ
5	IM Providers	Ab NLBEndPointUrl	REG_SZ
5	Microsoft	ab OrganisationFriendlyName	REG_SZ
3	Mozilia	ab OrganisationName	REG_SZ
>	Netscape	anization ID	REG_SZ
>	ODBC	PerUserFieldName	REG_SZ
5	Policies	(ab) ProxyCrmDomain	REG_SZ
~	PTM EDV-Systeme	ProxyCrmUserName	REG_SZ
>	AutoMergeserver	ab proxyIntegratedSecurity	REG_SZ
~	DocumentsCorePackclient2011	ab ProxyUrl	REG_SZ
	UI-Settings	(ab) ProxyWPAC	REG_SZ
~	Profiles	ab RetryOnConnectionFailed	REG_SZ
	- 10A5A539-D235-4996-AA04-3BDAB75713CF	ab) SDKLevel	REG_SZ
	22481AD1-3F6D-438C-97FF-FAC84C40AAA3	ab) Server2ServerConnection	REG_SZ
	2613A286-60F9-4657-B43B-D1711869B8BA	Server2ServerConnectionDisco	REG_SZ
	- 619BFE16-FDC2-43E9-A49B-0861DCF919A4	ab Server2ServerEnabled	REG_SZ
	- 6DDE7630-2E1A-4F87-AF79-ACA3A72FC4A2	Server2ServerSharepointConnection	REG_SZ
		Server2ServerSharepointEnabled	REG_SZ
	B250708C-DE76-4791-B1DA-25262544AE6B	ab Show Error Dialog	REG SZ

Figure 11: CrmUserName key

4. Now change the existing key from your actual username to e.g., EnterYourUsername@onmicrosoft.com. It is important that the domain is still the same as for your login.

Edit String	×
Value name: CmnUserName	
Value data: EnterYourUsemame@onmicrosoft.com	
	OK Cancel

Figure 12: Enter CrmUserName

That is all you need to do. If a different user logs in 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.



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.

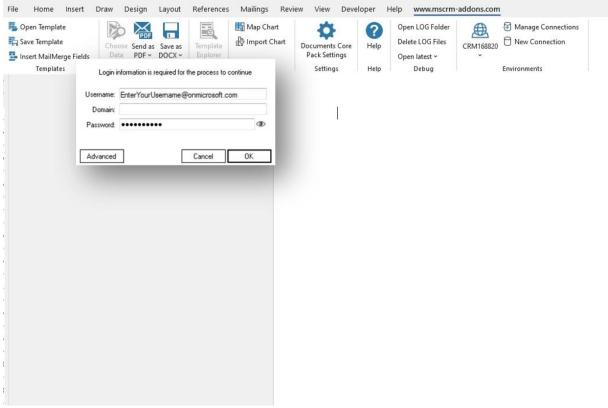


Figure 13: Log-in on a Terminal server using DCP for the first time

5. Unattended Setup DocumentsCorePack Template Designer for Dynamics 365

To install the DocumentsCorePack Template Designer for Microsoft Dynamics 365 unattended, you need to supply a registry file with the required registry settings. The unattended install is available for the DocumentsCorePack Template Designer Version 5.18 and above.

ATTENTION: The Microsoft Windows Identity Foundation software MUST be present before the installation, or the installation will fail.

In the files below, you can download templates to perform the unattended install. They are set up for x86 and x64 systems.

The templates contain inline documentation regarding the possible settings that can be set for the Template Designer application.



The described keys and place holder have to be replaced to have a valid registry file for the installation process.

Please note: The current examples are set up for **http**. If you are using **https** you also have to adjust the protocol in these files!

uai_RegCRM2013 x86 x64.reg (8.90 kb) uai_RegCRM2011 x86 x64.reg (8.88 kb)

This 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 nformation, e.g., crm:5555

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

These both keys also have to be applied to the

DiscoveryCrmServiceUrl=[PROTOCOL]: //[YOURCRMSERVER:PORT]/[UNIQUEORGANISATIONNAME] /XRMServices/2011/Organization.svc.

PROTOCOL: Either http or https.

ORGANISATIONFRIENDLYNAME: The display name of the organization.

OrganisationFriendlyName contains the Organization name.

While not vital, it should be changed to reflect the correct Organizsation name. The path variable in the templates has to be adjusted as well depending on the architecture of the Template Designer.

(Program Files (x86) or Program Files)

If your discovery service is using Https (Usually it's 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 <u>launch.bat (116.00 bytes)</u>

[DocumentsCorePackInstallFolderAndFile]" /V"/qb /lvx* C:\instlog.txt UAIREGFILE=[RegFileLocation]\[RegistryFileName].reg

The tags **DocumentsCorePackInstallFolderAndFile** needs to point to the correct installation source folder and filename.

RegFileLocation needs to point to the folder of the prepared registry file. If you have changed the registry filename previously, you need to adapt this change in the command as well.

RegistryFileName: The filename has to be adjusted depending on the file you are going to use for the install process.

6. Uninstall DocumentsCorePack Template Designer Component

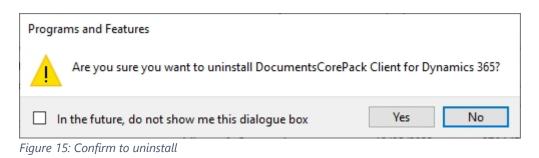
To uninstall DocumentsCorePack Template Designer for Microsoft Dynamics 365 select **Programs and Features** in the **Control Panel**. Search for the **DocumentsCorePack Client for Dynamics 365** in **Uninstall or change a program** and click on **Uninstall**.

← → × ↑ 🖬 Control	Panel > Programs > Programs and Features	~ (Search Program	ms and Features		
Control Panel Home	Uninstall or change a program					
View installed updates	To uninstall a program, select it from the list and	then click Unir	nstall, Change or Repa	r.		
Turn Windows features on or						
off	Organise 💌					EE +
Install a program from the network	Name	Publishe	r	Installed On	Size	Version
incertorine in a	ActivityTools for Dynamics 365	PTM EDV	-Systeme GmbH	04/05/2022	20,6 MB	2020.10
	Adobe Acrobat (64-bit)	Adobe	•	09/05/2023	587 MB	23.001.20174
	Attachment Extractor Server for Dynamics 365	PTM EDV	-Systeme GmbH	21/04/2023	52,8 MB	2020.21
	DCPPrintApplication for Dynamics 365	PTM EDV	-Systeme GmbH	20/12/2021	66,1 MB	2020.83
	DocumentsCorePack Client for Dynamics 365	PTM EDV	-Systeme GmbH	16/05/2023	58,0 MB	10.42
	DocumentsCorePack Server for Dynamics 365	PTM EDV	-Systeme GmbH	02/05/2023	168 MB	2020.136

Figure 14: Uninstall DocumentsCorePack Template Designer



In this window confirm with Yes.



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8. Contact

For further technical questions, please visit our <u>blog</u> or contact <u>support@mscrm-addons.com</u>. For sales and licensing questions please contact <u>office@mscrm-addons.com</u> or the corresponding contact information below.



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