DocumentsCorePack Server

for MS CRM 2015

Server and/or Client Based
Document Generation & Processing

v.2015.9 – January 2015

Server and/or Client Based Installation Guide
(How to install and configure DocumentsCorePack for MS CRM 2015)

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1 Common Information

In order to simply handling our former AutoMerge solution is now renamed in **DocumentsCorePack Server Based Document Generation** and is part of DocumentsCorePack.

Accordingly, **DocumentsCorePack for MS CRM 2015** now comes with all tools:

- Server Based (formerly AutoMerge) and/or
- Client Based document generation & processing based on MS CRM data.

Depending on the license bought, the **Server Based and/or Client Based Document Generation** provide you with a set of tools to create and process documents inside CRM with a few clicks.

Before installing DocumentsCorePack Server and/or Client Based Document Generation for MS CRM 2015, please read this document and follow the steps carefully.

This setup contains all installations and configuration needed for using DocumentsCorePack Server and/or Client Based Document Generation & Processing.

For detailed information about the different features and settings of DocumentsCorePack Server- and or Client based Document Generation, please click here.

1.1 Intended Audience

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

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

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

- Installing DocumentsCorePack Server for MS CRM 2015
- Configuring DocumentsCorePack Server for MS CRM 2015

2 License

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

3 Prerequisites

3.1 Microsoft .NET Framework 4.5.2 RTM is required

The RTM version of Microsoft .NET Framework 4.5.2 is required.

3.2 Supported CRM Versions

- Microsoft Dynamics CRM 2015 RTM On Premise
- Microsoft Dynamics CRM 2015 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 32/64 bit
- Windows 8.1 32/64 bit
- Windows Server 2012 32/64 bit

4 Installation Server Component

You could install the DocumentsCorePack Server on every supported operating system which is able to connect to your CRM 2015 server. During the installation you have to specify at least one organization in which the DocumentsCorePack will be installed.

Possible Installation Scenarios:

NOTE: CRM On-Premise: Please install with your CRM-Deployment Manager!

1. *Install directly on a CRM 2015 On-Premise Server*
   You could install the DCP Server directly on a CRM 2015 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 Onlinef*
   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. The DocumentsCorePack own SharePoint integration is not supported on CRM online. (The CRM integrated SharePoint is fully supported)

b. File Explorer integration

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

4.1 Online Service Configuration

The web-based setup allows users to configure DocumentsCorePack Server-based Document Generation for MS CRM Online without any local installations. The service as well as licensing can be configured and maintained on our website. (Only available for MS CRM 2013, 2015 Online (RTW) / Hosted (IFD)).

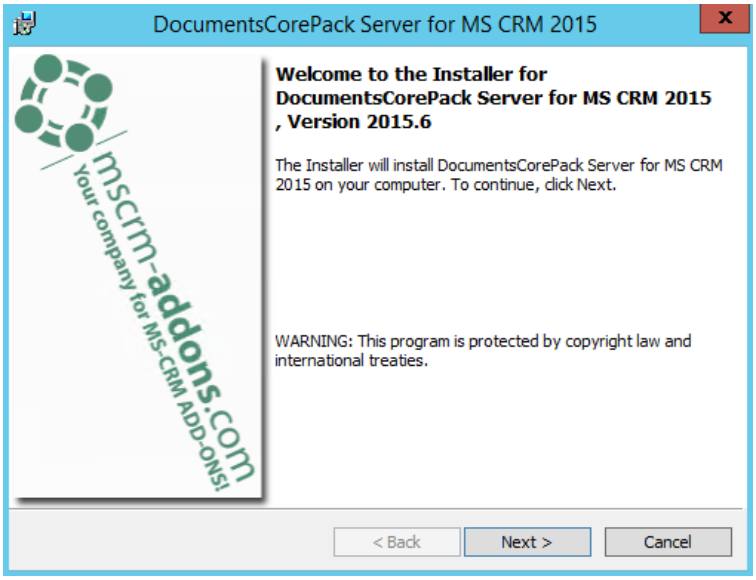
For detailed information for On-Premise Installations please read chapter 7 Service Configuration for DocumentsCorePack.

Follow the links listed below for detailed information:

- Start Trial/Configure Services for DocumentsCorePack Server Based for MS CRM Online.
- Watch our DocumentsCorePack Server Based Online Service Configuration YouTube Video.
- DocumentsCorePack Server Based Online Service Configuration User Guide.

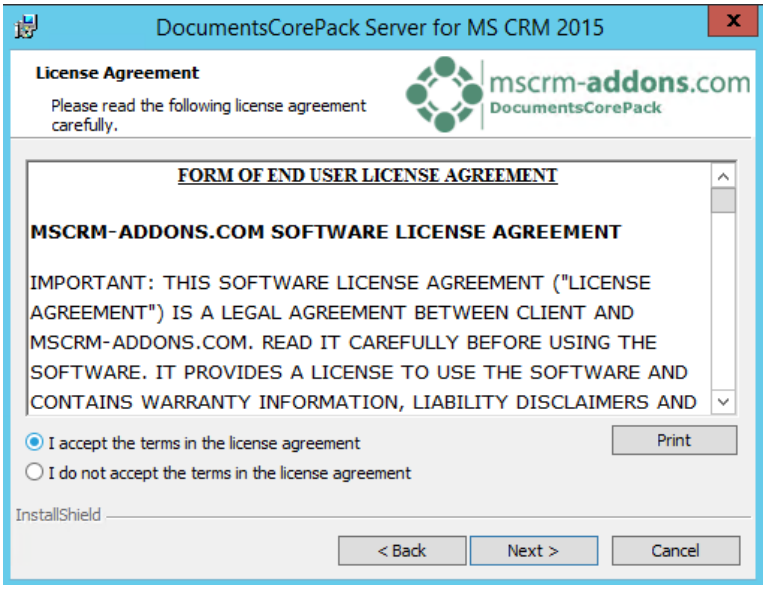
4.2 Installation

Run the DocumentsCorePack Server for MS CRM 2015 setup file. The following window will appear:



Click [Next] to proceed. INFORMATION: If an upgrade is detected, a message will be shown and the setup will go to chapter 4.2.3 "Confirm Installation", directly after accepting the EULA 4.2.1.

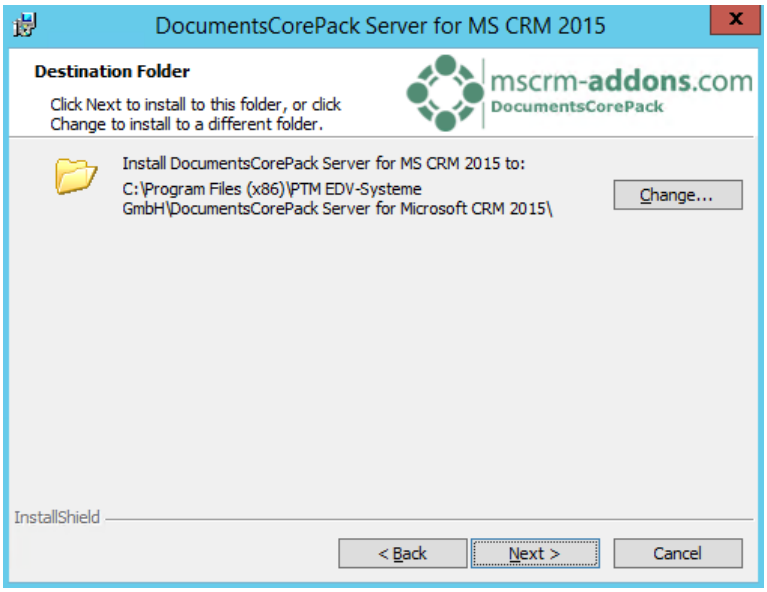
4.2.1 EULA (End User License Agreement)



Click [Next] to proceed.

4.2.2 Folder Selection

Here it's possible to set the installation directory.

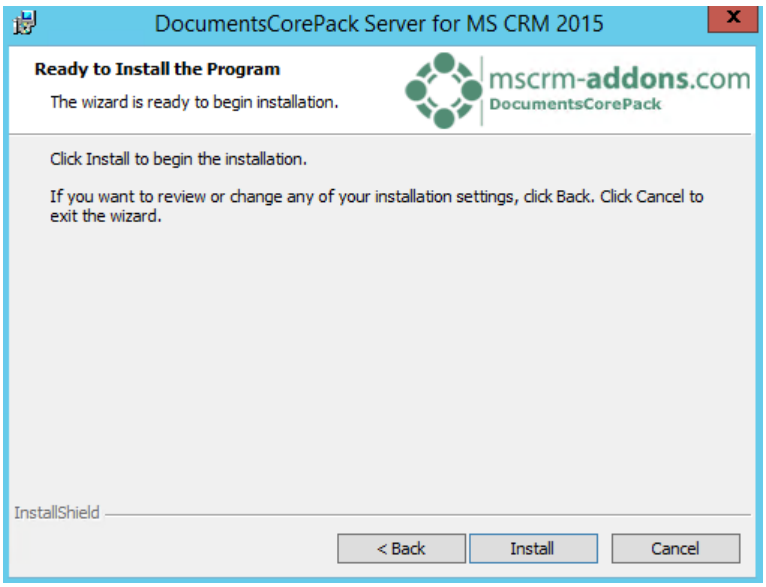


Click [Change] to specify a different installation path. Click [Next] to proceed.

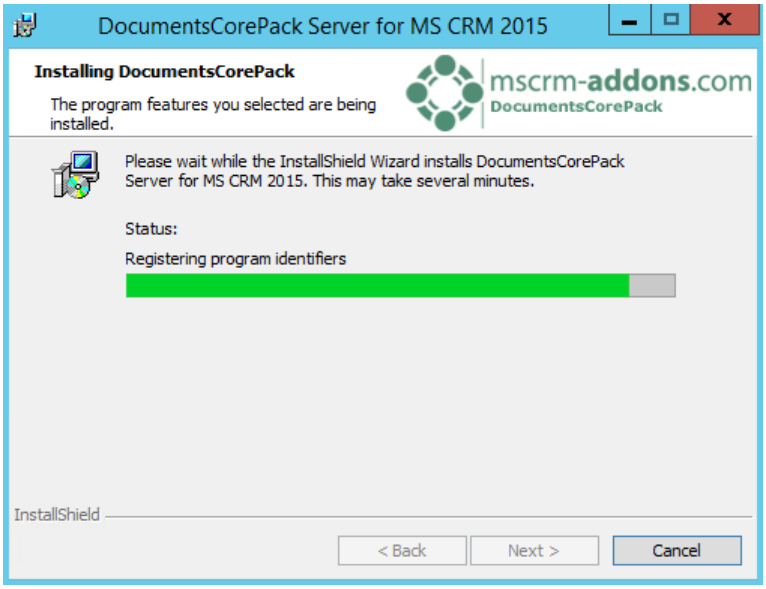
4.2.3 Confirm Installation

To start the installation, click on [Install].

To change the settings, click on [Back].

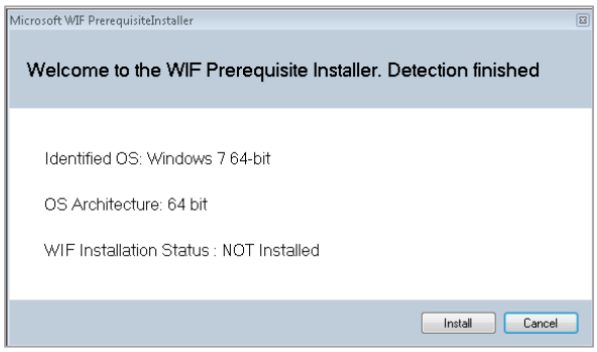


While the installation is running, following window appears:



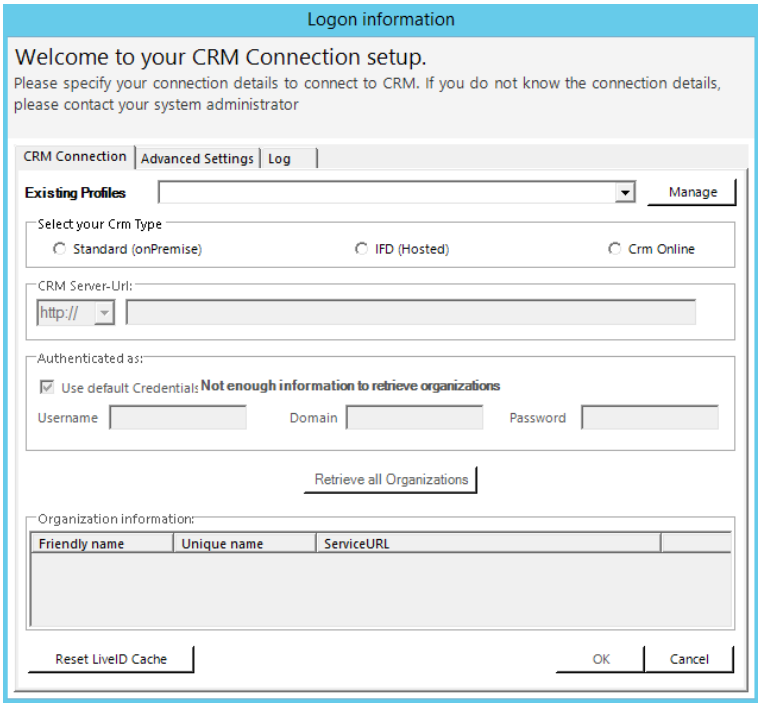
4.2.4 Install Windows Identity Foundation

To use the DocumentsCorePack Server for MS CRM 2015 you have to install the Windows Identity Foundation. This window will only pop up when the Windows Identity Foundation is not installed.

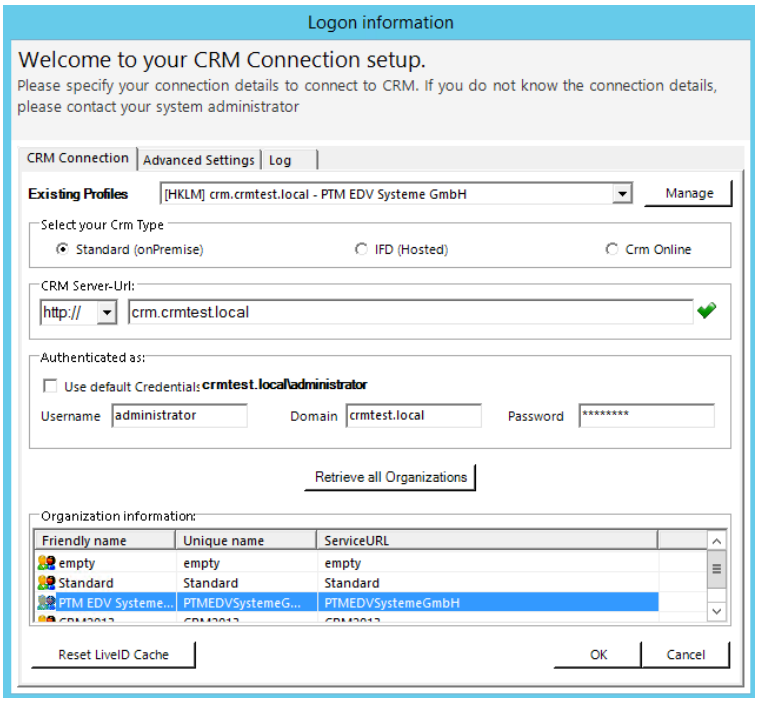


4.2.5 Configure CRM Server

During the installation, following CRM Connection setup window appears:

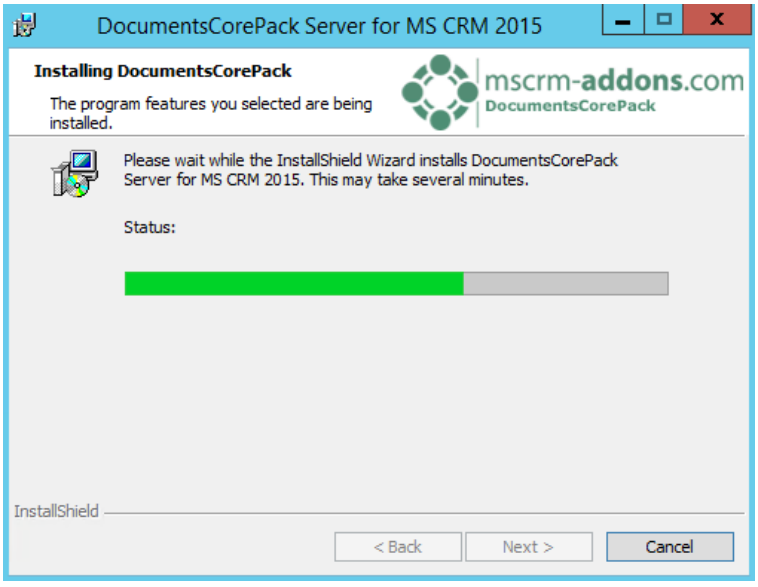


To configure your CRM server, select your profile or create a new profile and select your CRM Server type. Choose the server path and add your login credentials by filling in the field's username, password and domain or choose the default credentials. Click on [Retrieve all Organizations], as soon as the organizations are retrieved, choose one and press the "OK"-button. (See next screenshot).

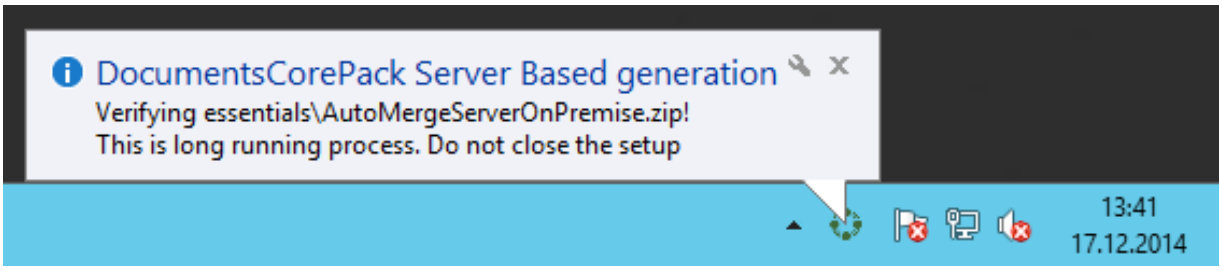


For DocumentsCorePack, the IFD setup is only required when using SharePoint Folder and Sites Integration. You have to install IFD before you can use it. You can find the IFD wizard here: http://www.mscrmaddons.com/Downloads/DownloadIFDToolforMSCRM2011/tabid/195/Default.aspx

Click on [OK] to continue. Following windows appear:



The installation can take a while. Please do not close the window. As reminder you will see following message-box in the Task pane:



If and old DocumentsCorePack version is detected while installation, you will be prompt to uninstall. For details please read chapter 5 "Obsolete products overview".

4.2.6 Security Roles

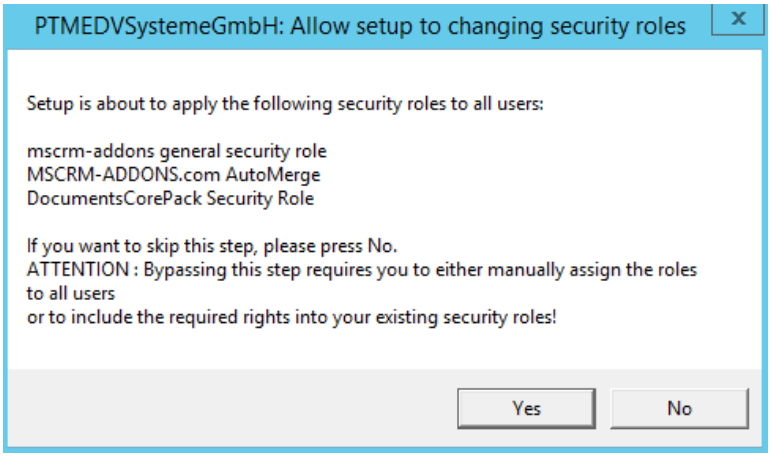
General security roles for all products:
The following security role is required by all our products:

- MSCRM-Addons General Security Role

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

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

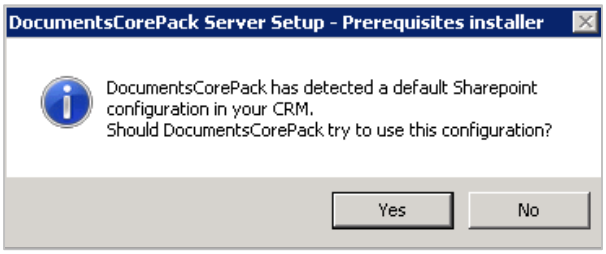
- **DocumentsCorePack:**
  DocumentsCorePack Security Role
- **AutoMerge**
  MSCRM-ADDONS.com AutoMerge



Click [Yes] to allow setup to changing these security roles. Click [No] to skip this step.

NOTE: Bypassing this step requires you to either manually assign the roles to all users or to include the required rights into your existing security roles!

If a SharePoint is already configured in your CRM-System, following window appears:



Click [Yes] to allow DocumentsCorePack Server Setup to use this SharePoint.

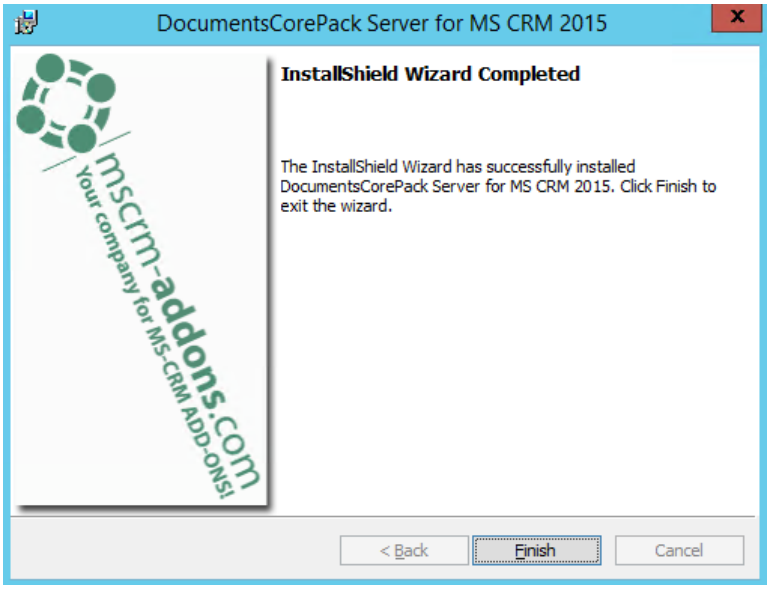
Click [No] to skip this step.

Please read chapter 9.3 "SharePoint" for detailed information on how to configure your SharePoint.

4.2.7 Finish Installation

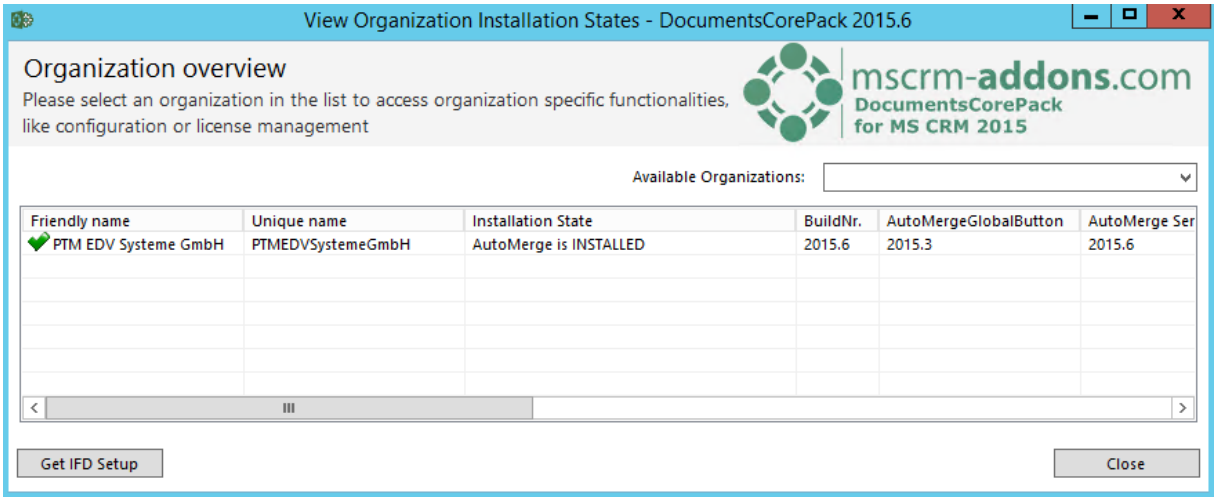
The DocumentsCorePack Server Configuration will start automatically for the organization you selected during the setup. Click on [Finish] to continue.

NOTE: If an obsolete products has been detected during setup you will be asked to delete the unnecessary product(s) to avoid confusion between the two products. See next chapter 5 Obsolete Products Overview.

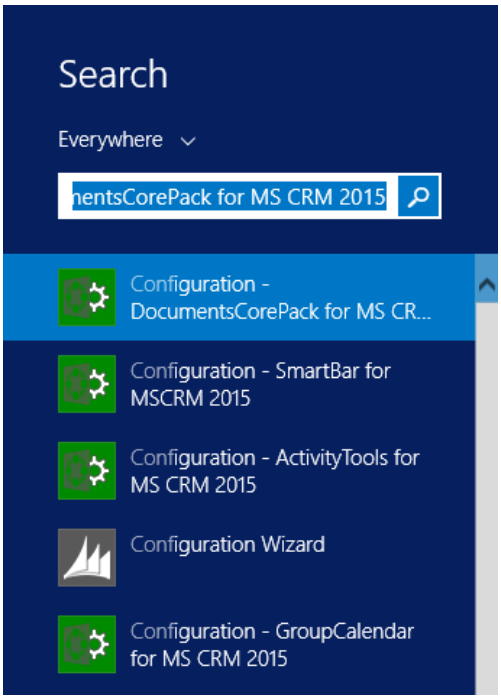


5 Organisation Overview

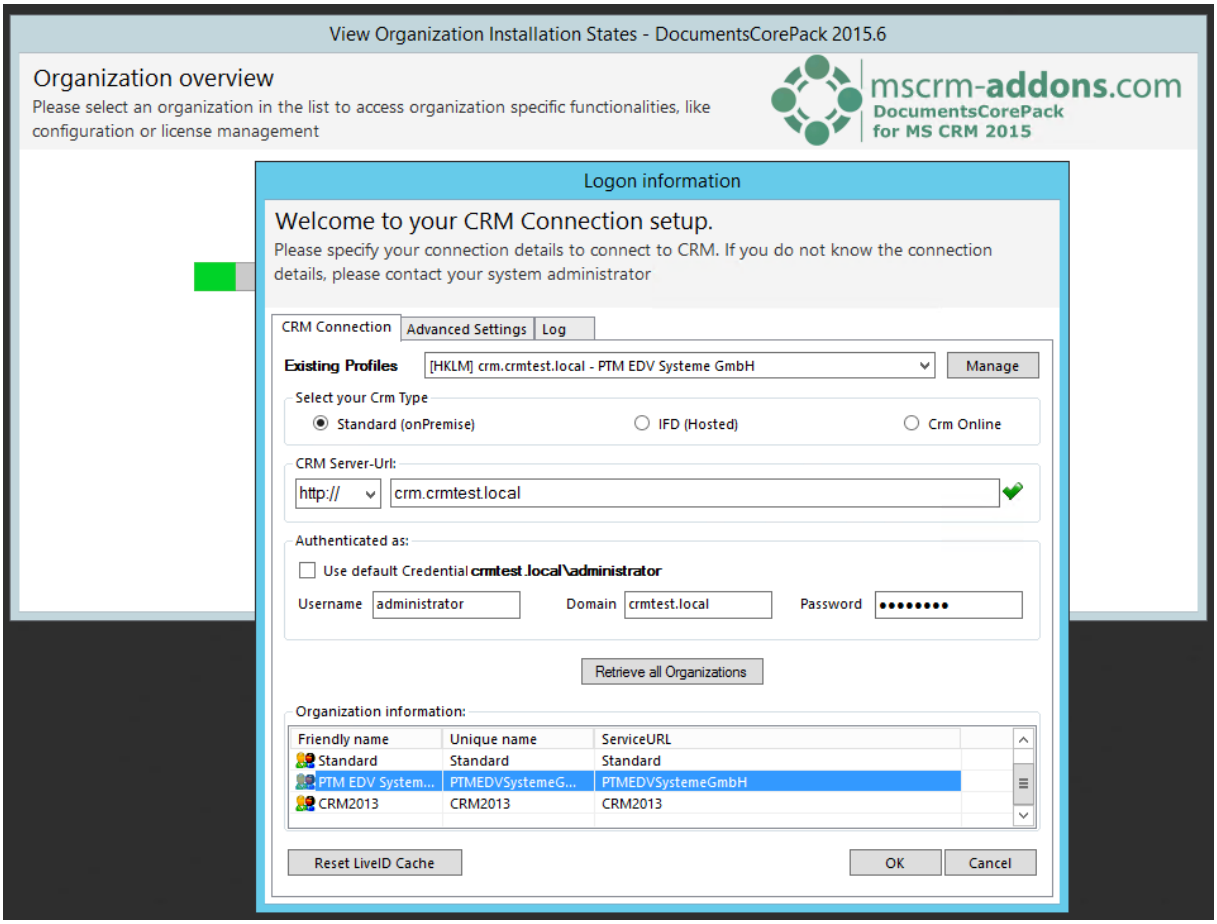
Once installation is finished the "Organisation overview" appears.



By closing this window, users can also open "Organisation Overview" via the windows start pane. To do this, search for "Configuration – DocumentsCorePack for MS CRM 2015". See next screenshot:

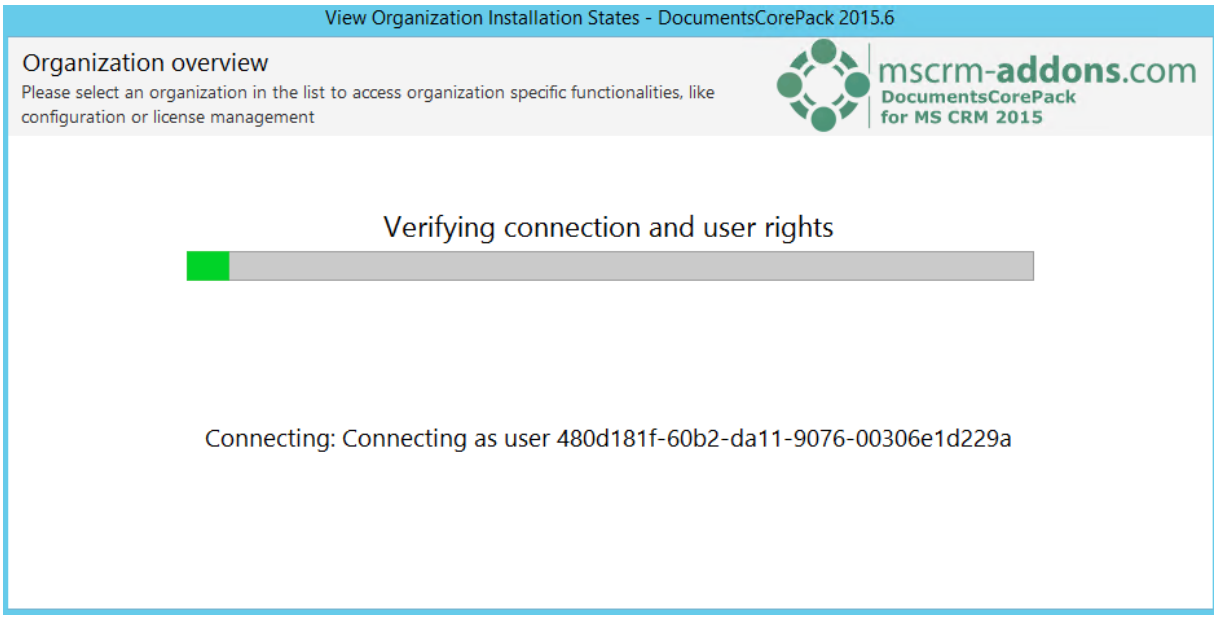


This action will open the CRM Connection setup:

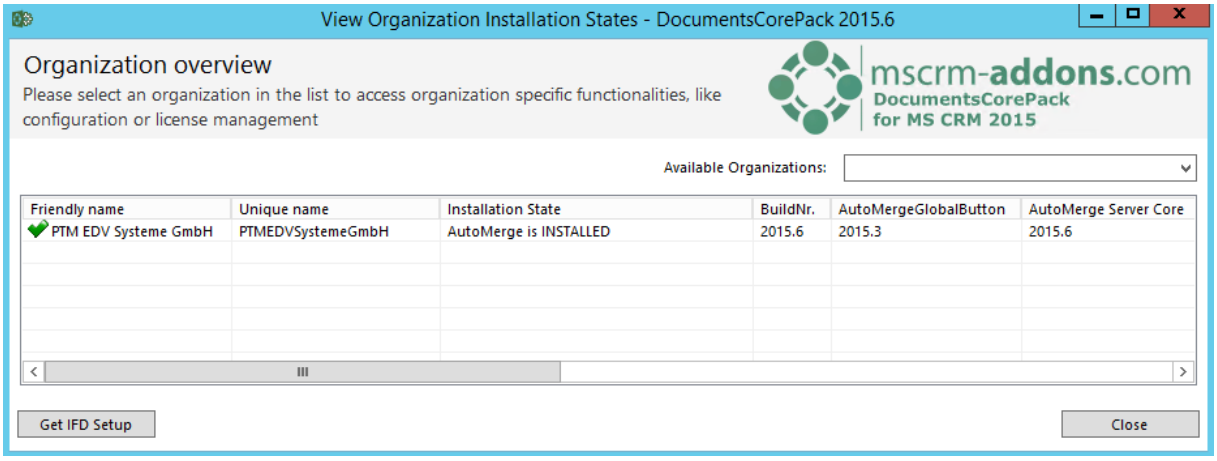


Choose your organisation – usually you just have to click [OK] to continue.

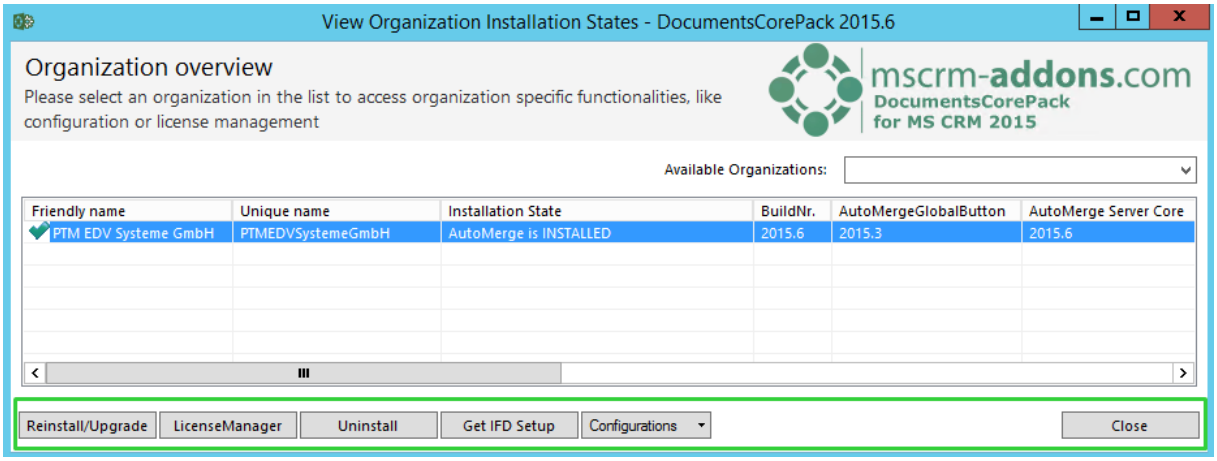
Following window appears:



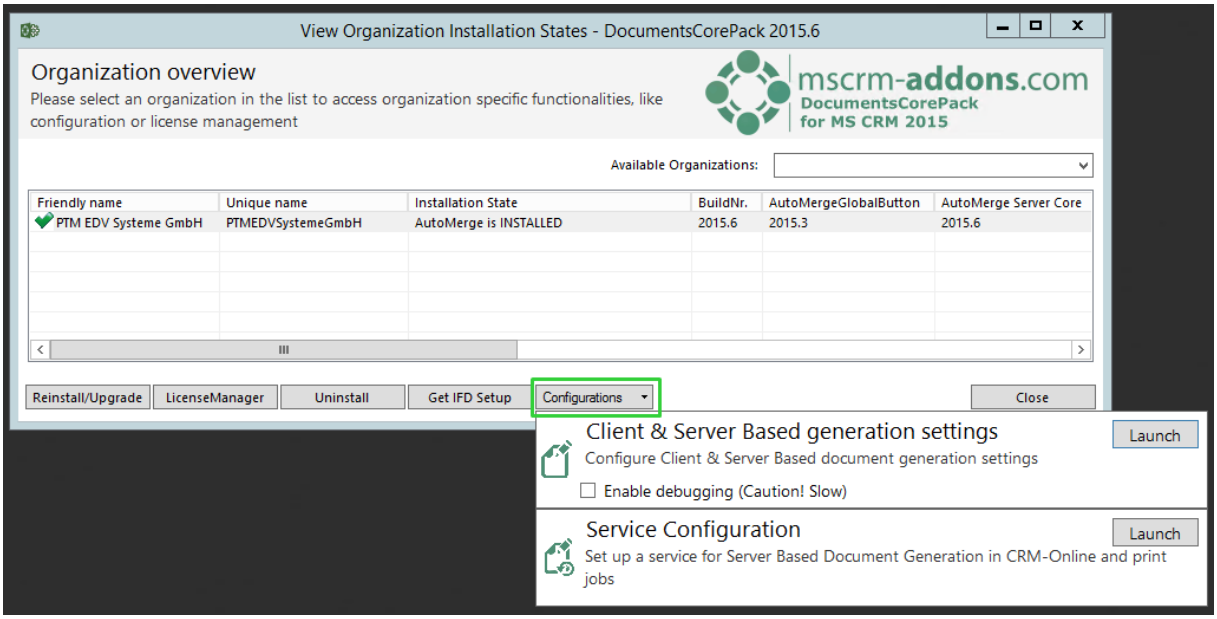
Again, the organization overview appears:



By choosing the appropriate organisation, the several function-buttons will be visible at the window-bottom.



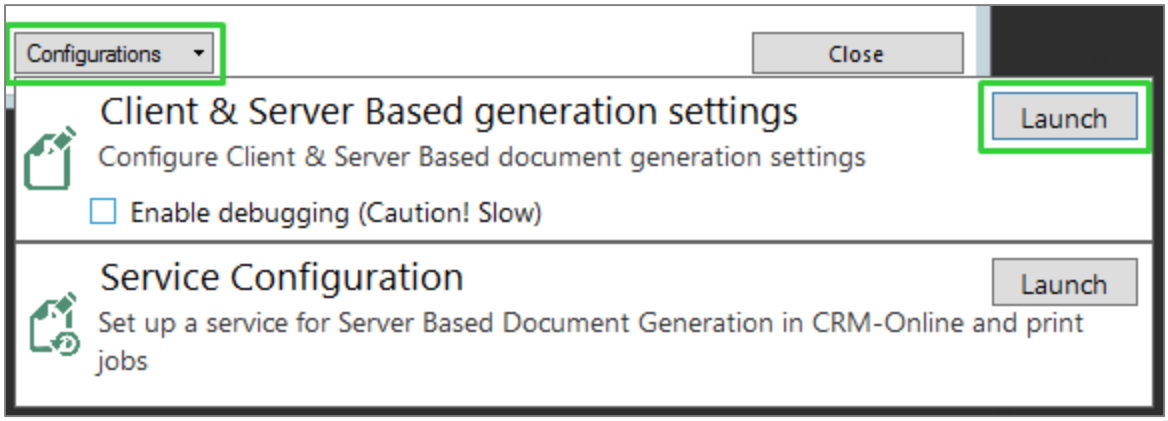
Click on the dropdown button next to [Configurations] to open the appropriate configuration:



The DocumentsCorePack Server installer contains all settings for Client & Server Based Document Generation as well as the Service Configuration to set up a Service for CRM online.

5.1 Client & Server Based generation settings

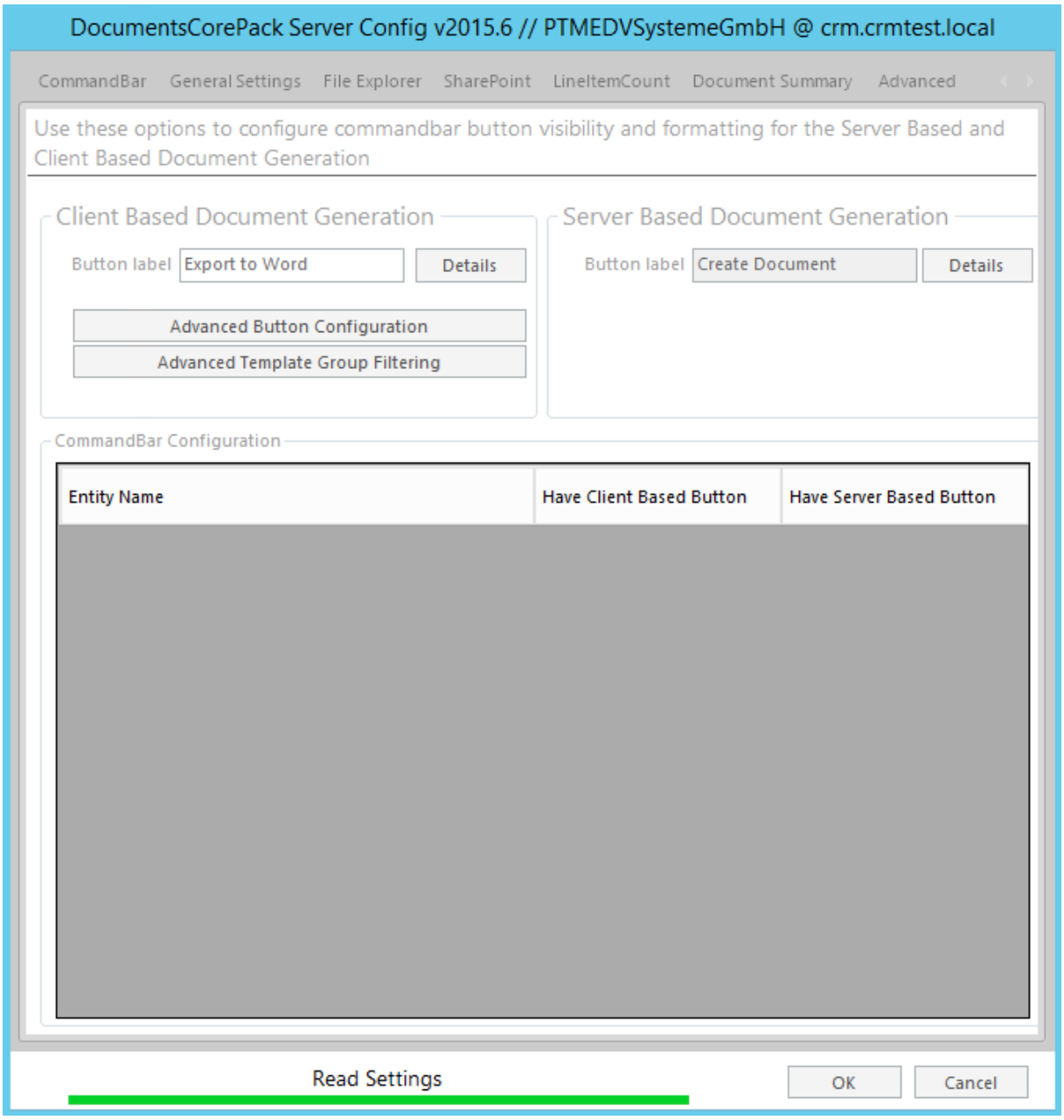
Click on [Launch] to open the settings for Client and / or Server Based Document Generation.



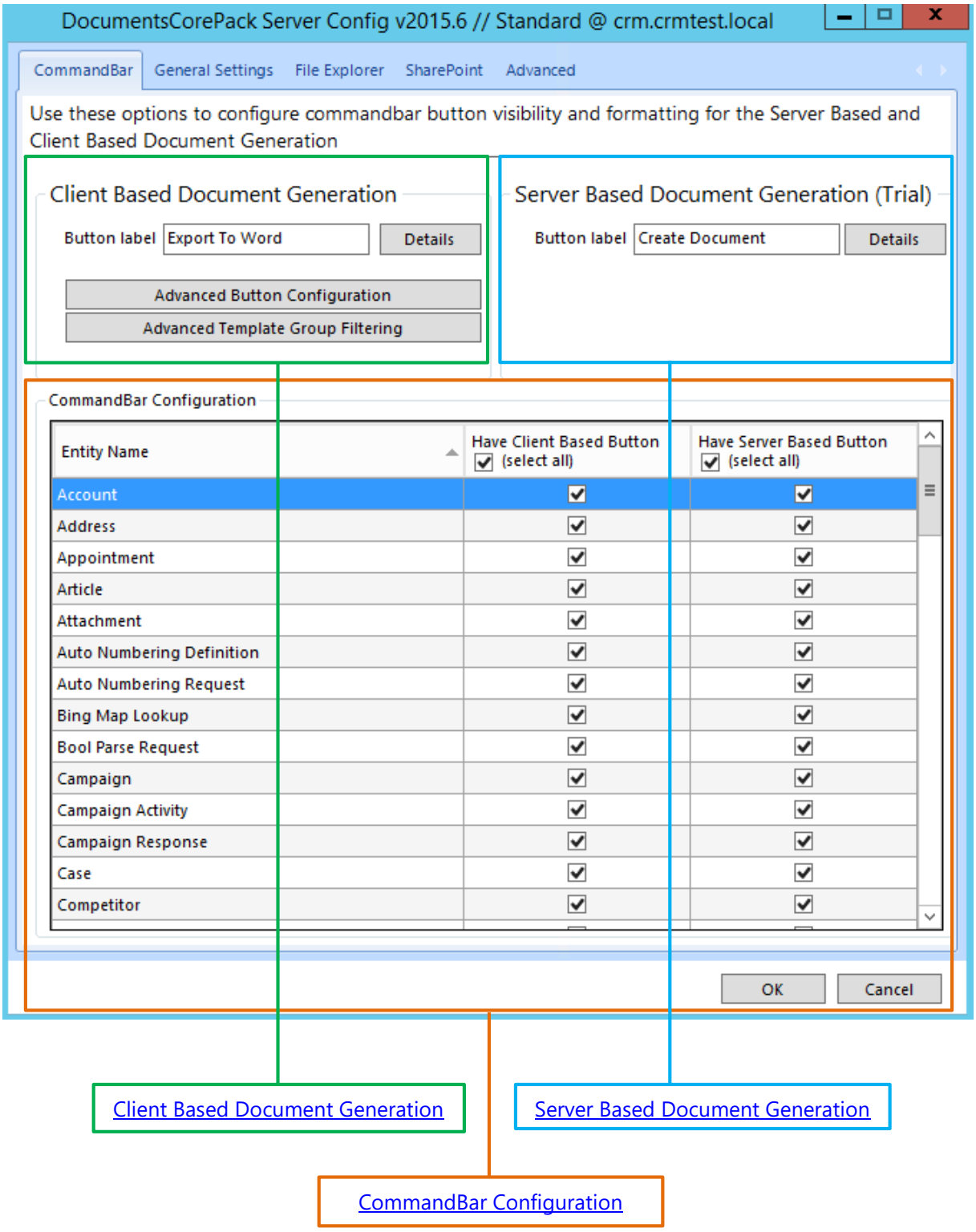
By activating the checkbox, debugging can be enabled. Attention: this will slow down the process!

5.1.1 DocumentsCorePack Client Based Config

First DocumentsCorePack will verify the installation status and read the settings. (See next screenshot)

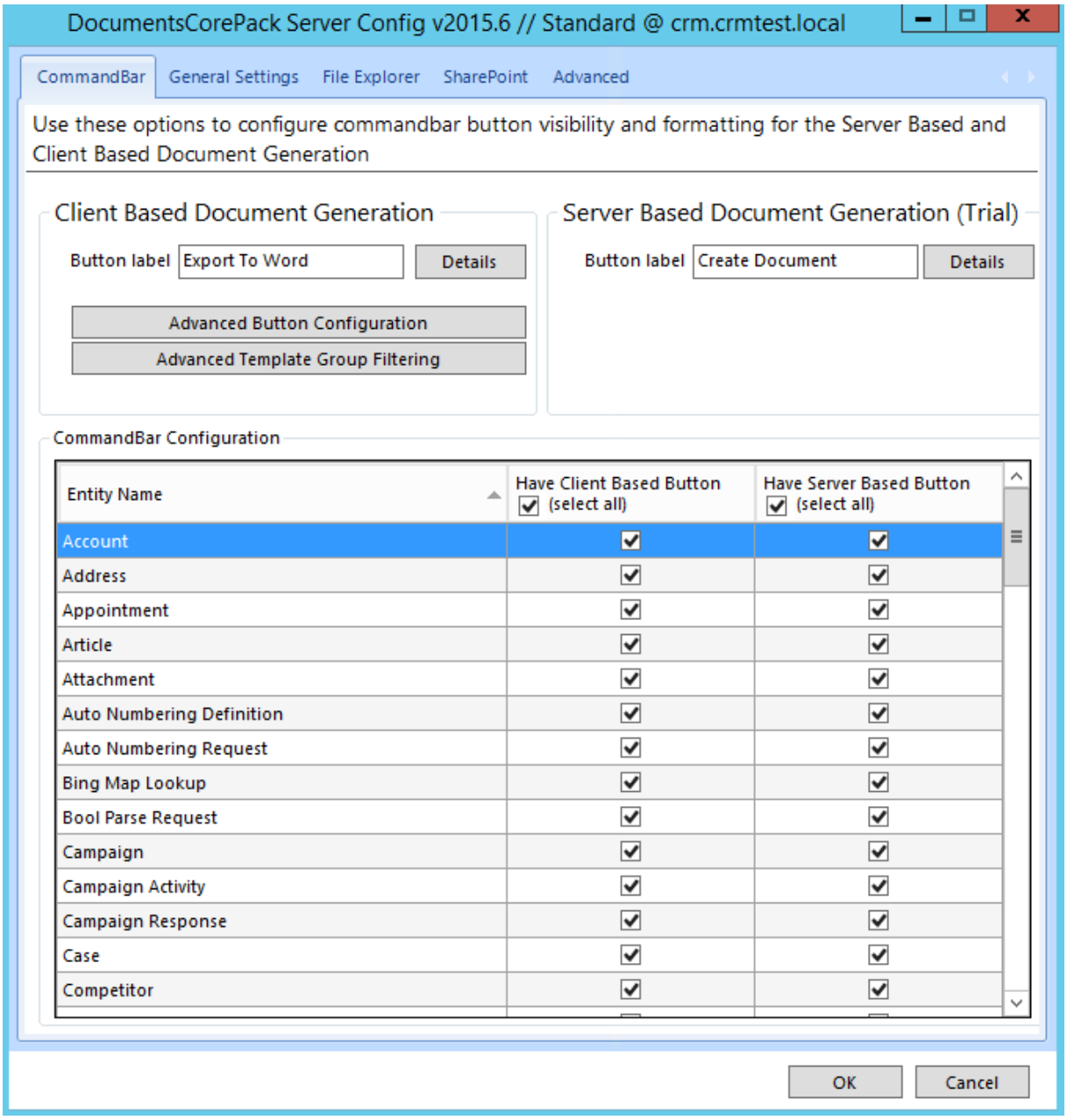


Once this is done, the DocumentsCorePack Server Config opens. The DocumentsCorePack Server Config allows you to specify the DocumentsCorePack settings. Here users can configure on which entities the Server and/or Client Based Button should appear and rename the button label. (E.g. configure on which entities you want to see the „Export"-Button etc.).



5.2 CommandBar-Tab

The options provided in the "CommandBar"-tab allows to configure the CommandBar button visibility and formatting for the Server Based and / or Client Based Document Generation.



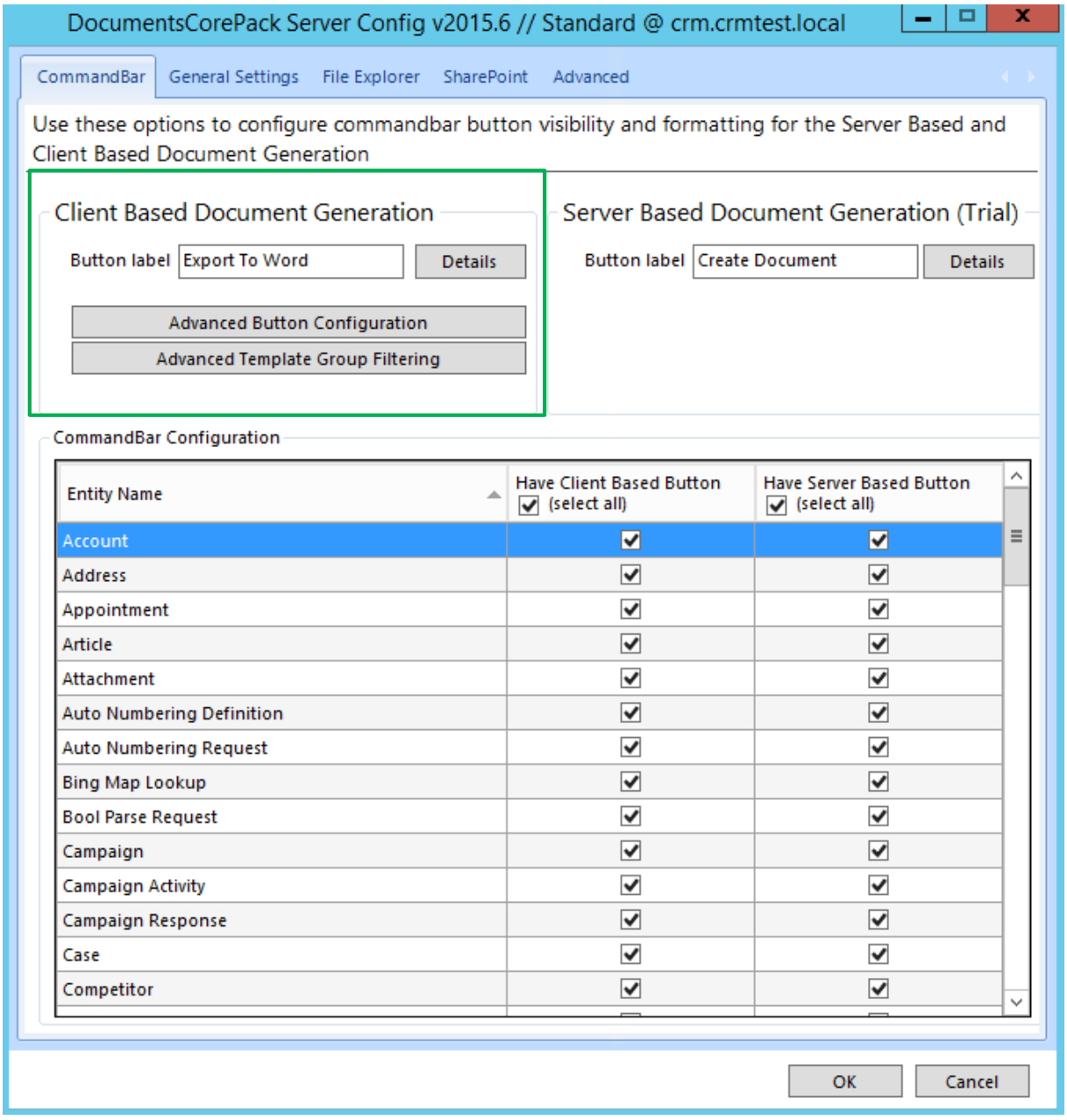
Here users can configure the entities where you want to see:

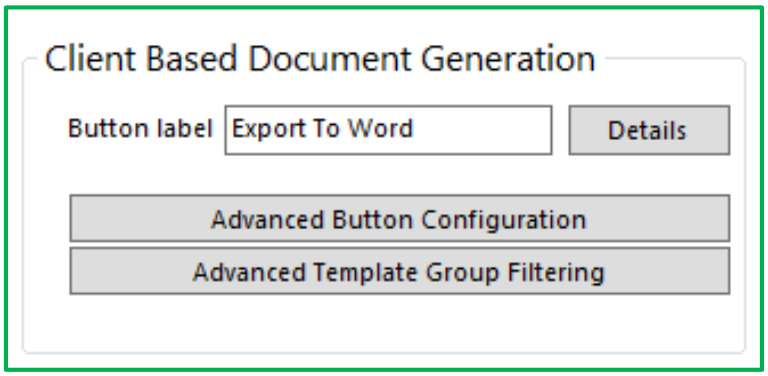
- The "Export To Word"-button for the Client Based Document Generation as well as
- The "Create Document"-button for the Server Based Document Generation

as well as the display name of these buttons.

5.2.1 Client Based Document Generation Settings

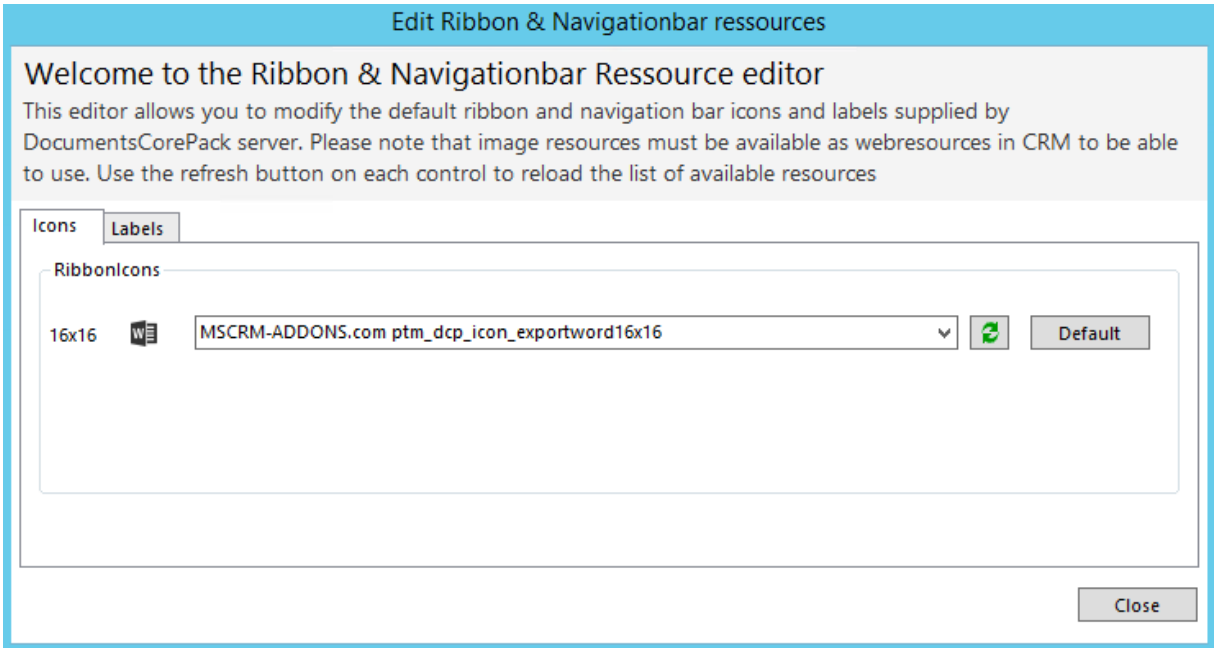
This section contains all settings for Client Based Document Generation.





Button label: "Export to Word" - here users can define a different name for the DocumentsCorePack Client Based button label.

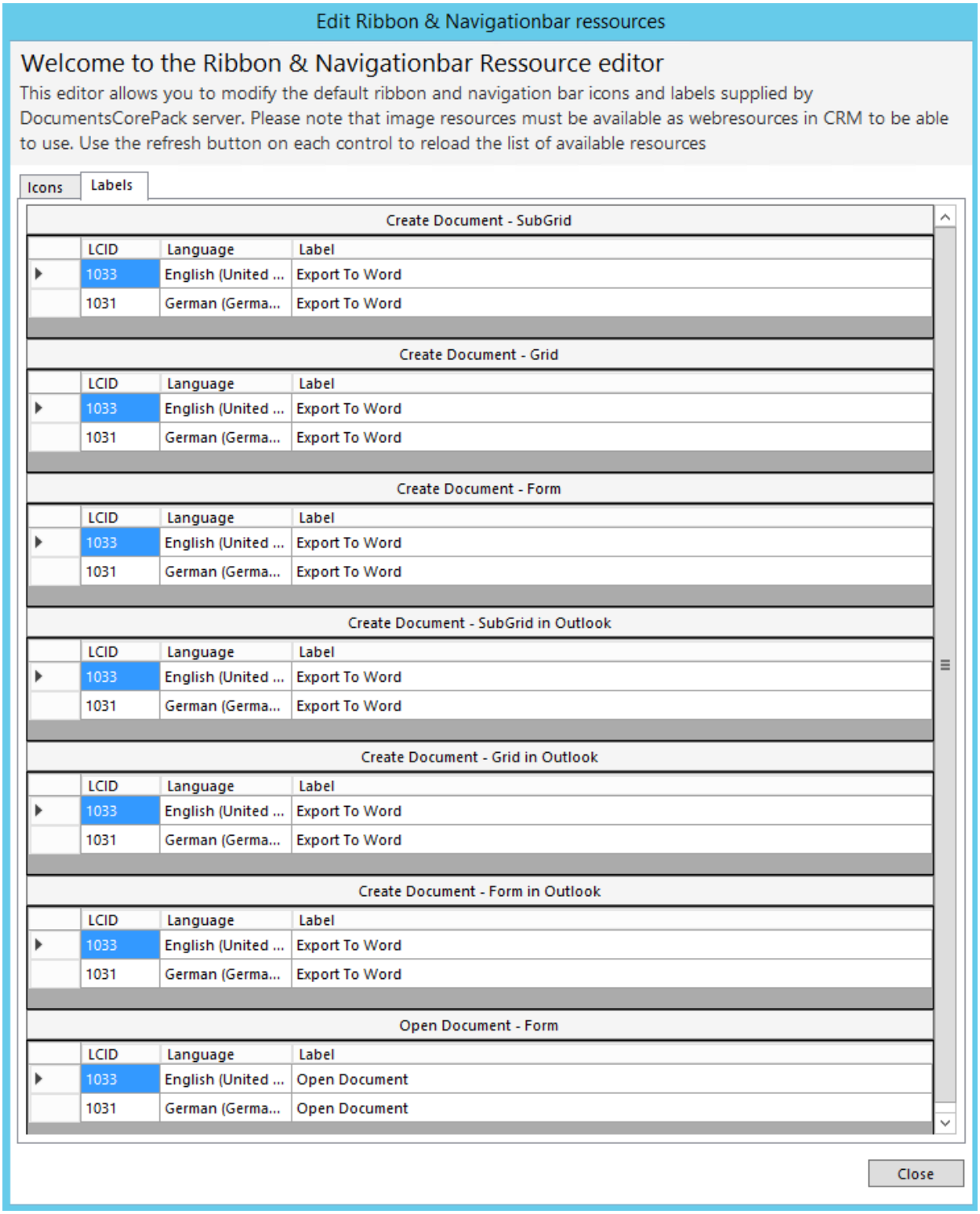
Details: With a click on [Details] following window appears:

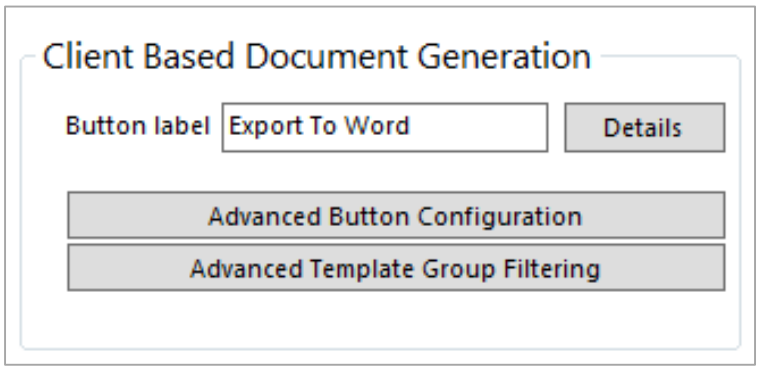


This editor allows users to modify the default ribbon and navigation bar icons and labels supplied by DocumentsCorePack server. Please note, that image resources must be available as webresources in CRM to be able to use. Use the refresh button on each control to reload the list of available resources.

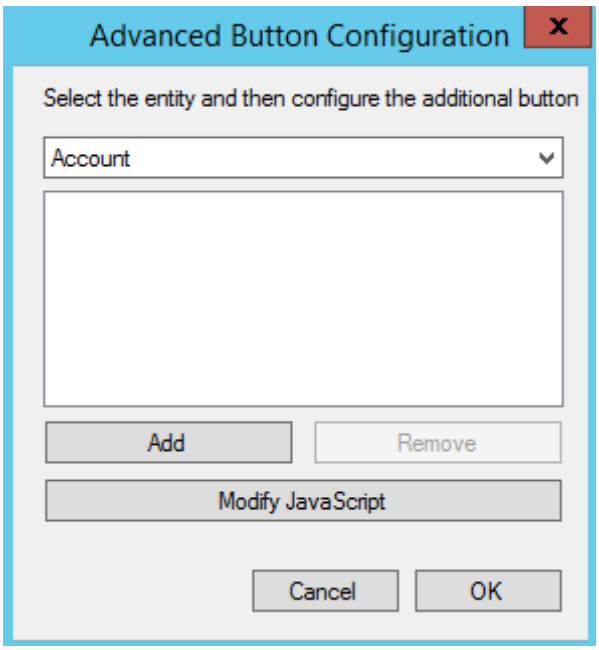
Icons: The icons tab of this configuration window gives you the possibility to change the icons of the buttons. The icons are CRM web resource you can upload some by yourself with the standard CRM functionality.

Labels: Within this dialog you can set the different labels for the different locations (Grid, Form...) of the "Export to Word" button for the different languages.



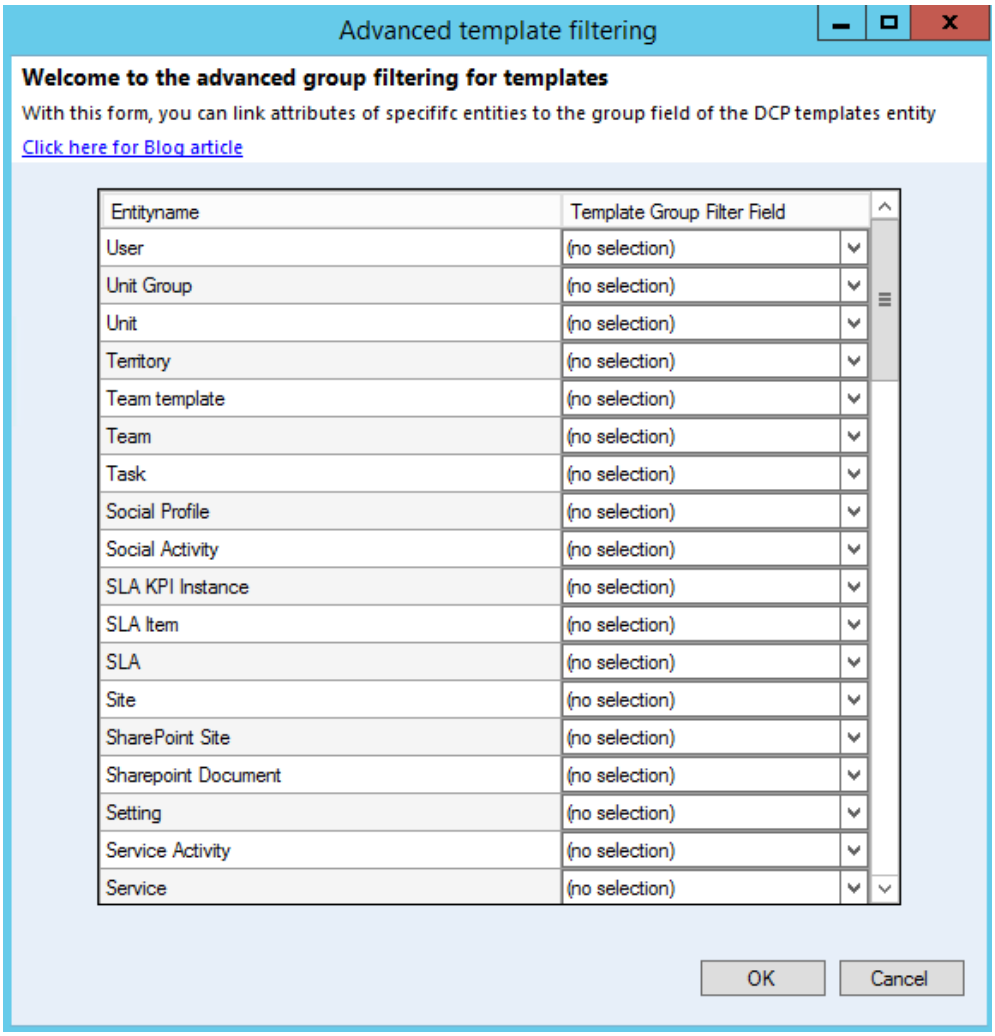


Advanced Button Configuration:

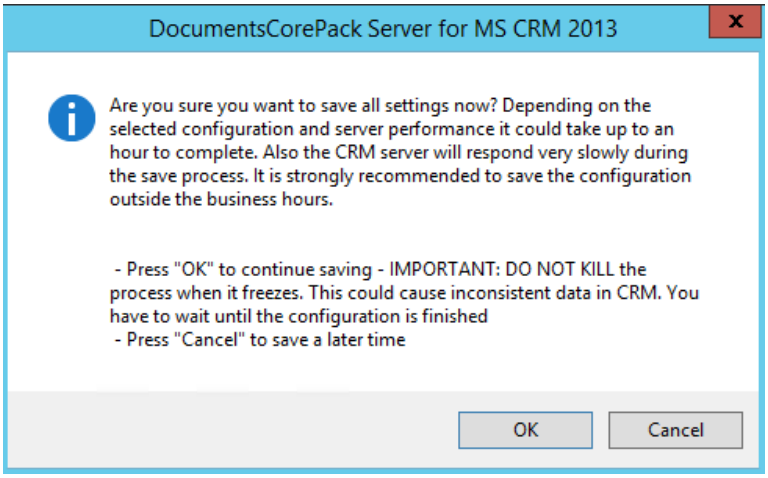


For details, please click here.

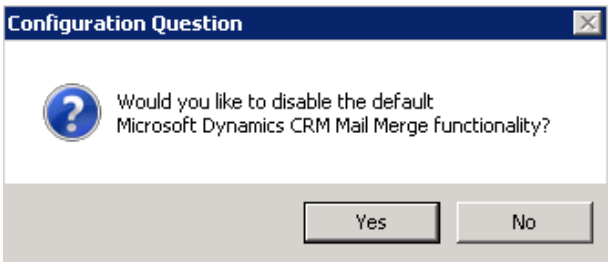
Advanced Template Group Filtering: This feature offers the possibility to set a filter for DocumentsCorePack templates. For detailed information, please read our blog article.



By saving the changes, following window appears:



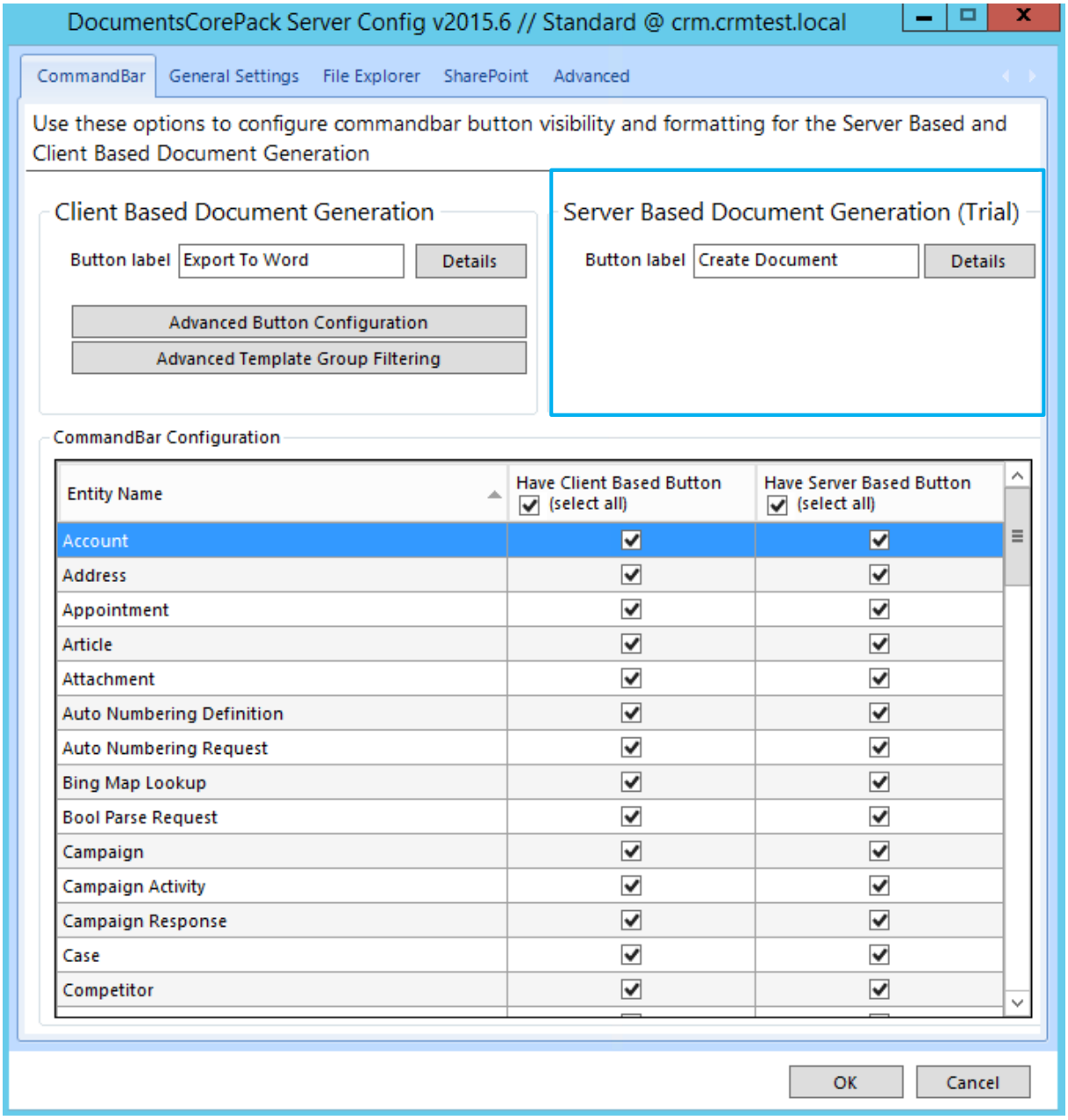
Click [OK] to continue saving the changes, click on [Cancel] to cancel the settings.

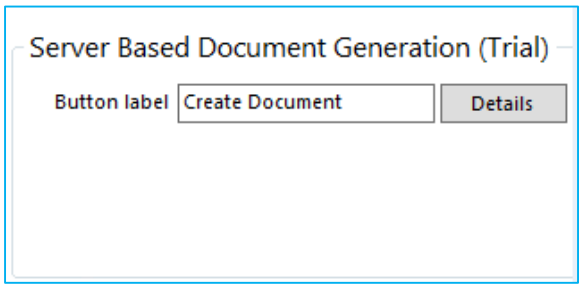


With a click on [Yes] Microsoft Dynamics CRM MailMerge functionality will be disabled as default.
With a click on [No], the MailMerge functionality will not be set as default.

5.2.2 Server Based Document Generation

Our **custom dialog** gives a quick start to server-based document generation. Users can directly after the installation start using the product without the need of designing own process or dialog to see the product in action.





All our addons come with a 14-days trial license. If the trial license expired the window will look like in the screenshot shown above. Please contact our support team to get the permanent license for DocumentsCorePack Server- and / or Client Based Document Generation & Processing.

For detailed information about licensing, please read chapter 6.2.4 licensing.

5.2.3 CommandBar Configuration

This part of the configuration, allows users to select the entities where the Client Based and or Server Based Button should appear.

Activating the checkboxes will select the Client Based Document Generation Button - "Export to Word" for the selected entity.

CommandBar Configuration

Entity Name	Have Client Based Button (select all)	Have Server Based Button (select all)
Account	☑	☑
Address	☑	☑
Appointment	☑	☑
Article	☑	☑
Attachment	☑	☑
Auto Numbering Definition	☑	☑
Auto Numbering Request	☑	☑
Bing Map Lookup	☑	☑
Bool Parse Request	☑	☑
Campaign	☑	☑
Campaign Activity	☑	☑
Campaign Response	☑	☑
Case	☑	☑
Competitor	☑	☑

Activating the checkboxes will select the Server Based Document Generation Button - "Create Document" for the selected entity.

5.2.4 Licensing

5.2.4.1 Licensing Possibilities

Depending on your needs we offer **Server-** and/or **Client-** licenses.

If you answer the following questions with "Yes" you need **Server-Based** Document generation license:

1. Do you want to generate documents based on a workflow or dialog?
2. Do you want to avoid the installation of a client based software on all your users machines?

If you answer the following questions with "Yes" you need a **Client-Based** Document generation license:

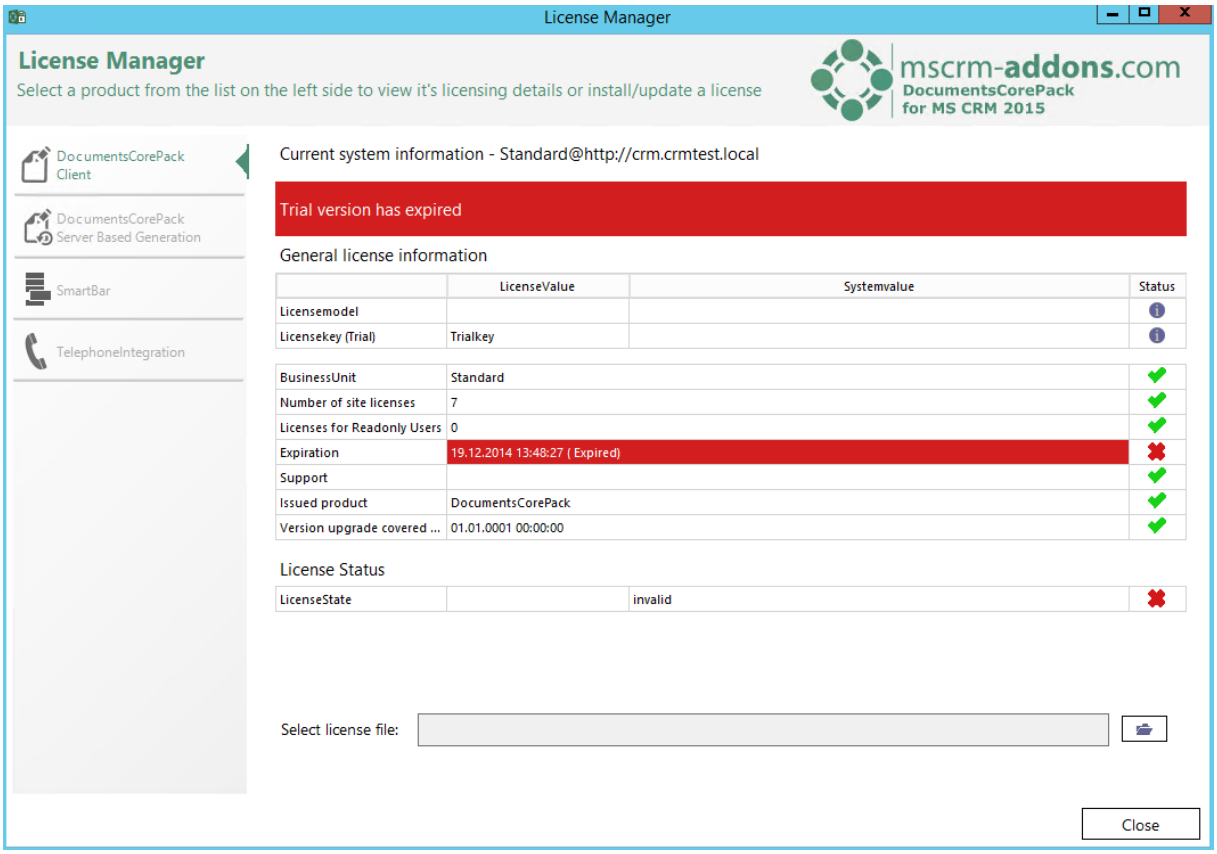
1. You want to generate the document in MS Word to confirm or modify before processing?
2. You need to generate documents offline?

5.2.4.2 License for Client-Based Document Generation

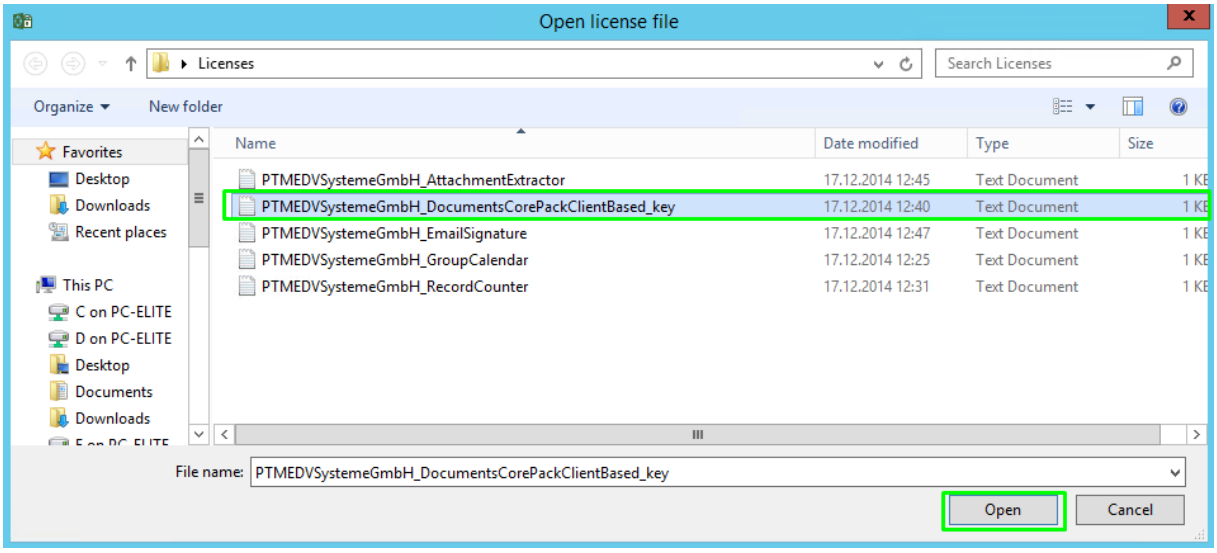
You can license the "Client-Based" document generation in two different ways.

- **Normal license:** Requires as many licenses as there are active users in CRM.
- **Per User license:** If you do not want to purchase a license for all your users you should take the per user model. The limitation you have with this model is that you have to purchase initially at least 10 licenses.

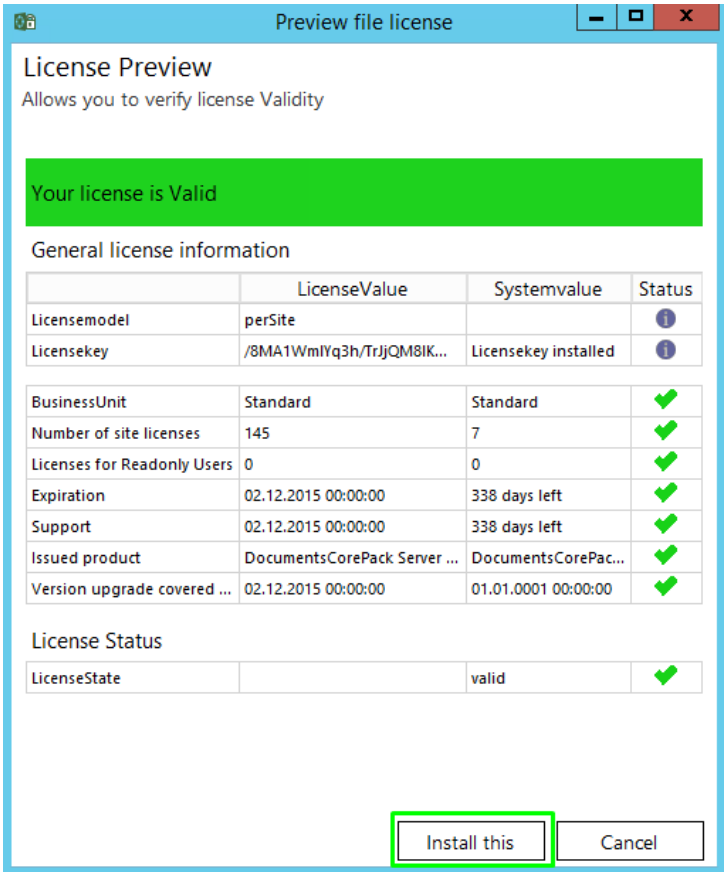
License Info: shows details about the license (validity, type, users) and some facts about the currently used license. If the license isn't installed or if Trial version has been expired the license window looks like follows:



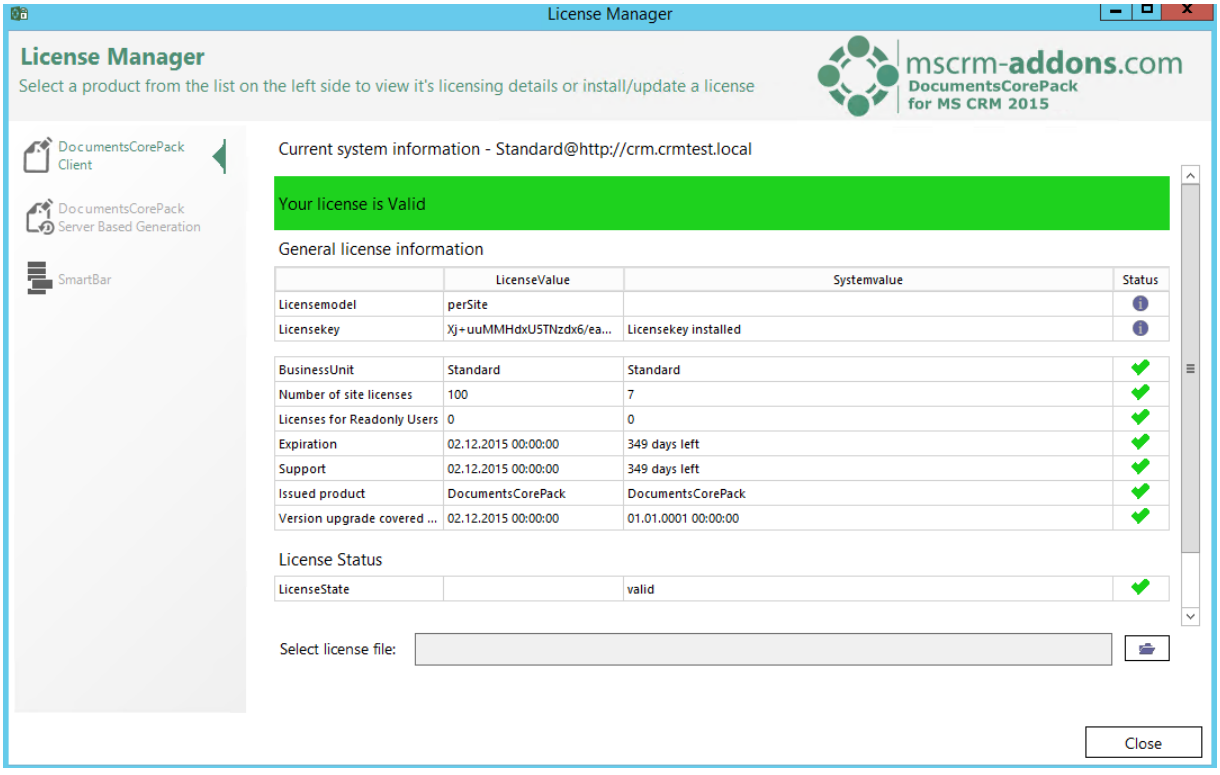
Please upload the required license text file, sent by our support-team with a click on the folder-symbol.



Click on [Install this] to finish the license installation.



Once the permanent license for your mscmr-addons.com solution has been installed the window looks like follows:



5.2.4.3 License for Server-Based Document Generation

The license for the Server-Based document generation is based on the amount of active users in your CRM. The Server-Based license always comes with one Template Designer license. If you need more, you can purchase additional DocumentsCorePack Client licenses.

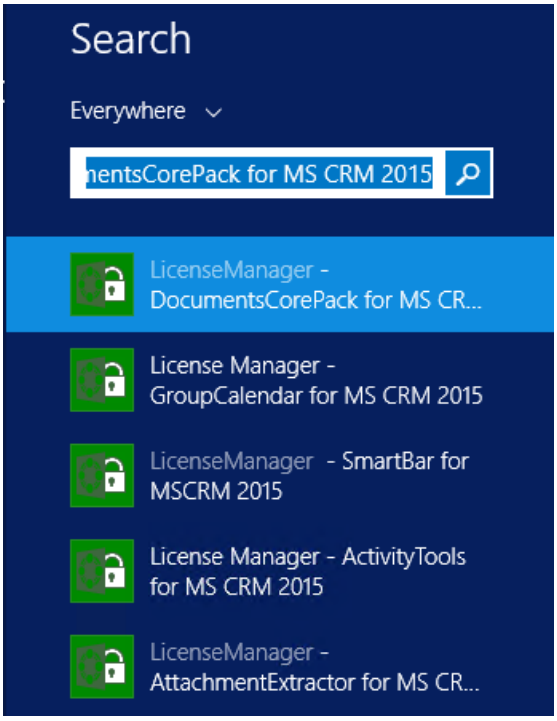
We have two ways to license the Saver-Based document generation:

1. **Online Subscription**
   This is the correct licensing method if you have CRM Online and don't want to install anything locally on your environment. Depending on the size of your MS CRM Organization you can decide between Small, Medium, Large and Enterprise. Details can be found here.

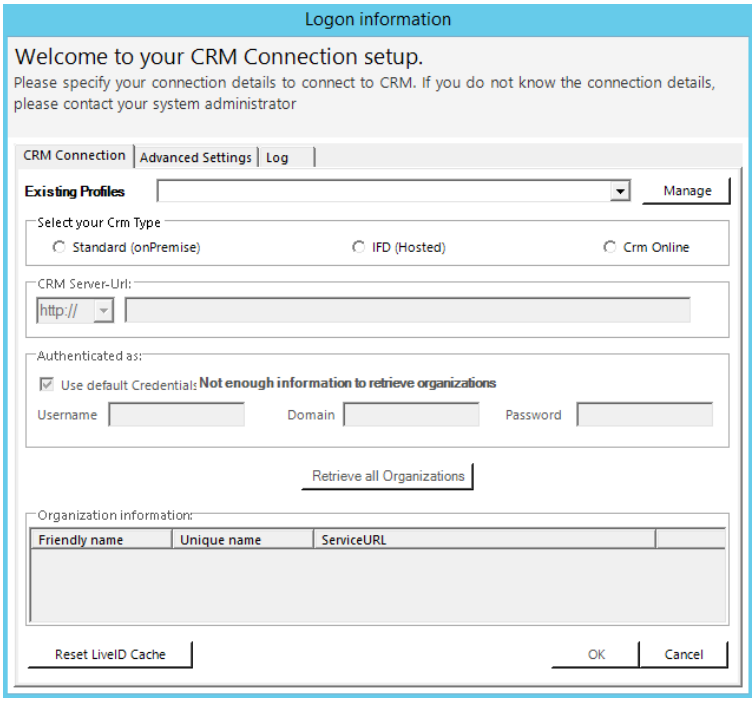
2. **On-Premise purchase**
   This version can be installed on your CRM server (On-Premise or IFD). Depending on the size of your MS CRM Organization you can decide between the different packages. You can find the prices in the navigation on left.

General license information: shows details about the license (validity, type, users) and some facts about the currently used license. If the license isn't installed or if Trial version has been expired the license window looks like follows:

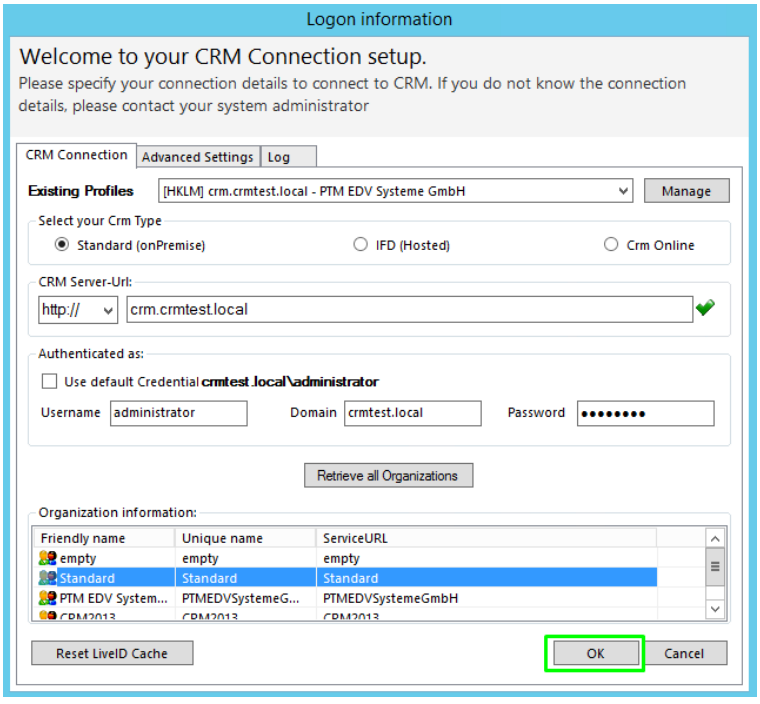
Search for "LicenseManager - DocumentsCorePack for MS CRM 2015" in your Start Pane and run the program.



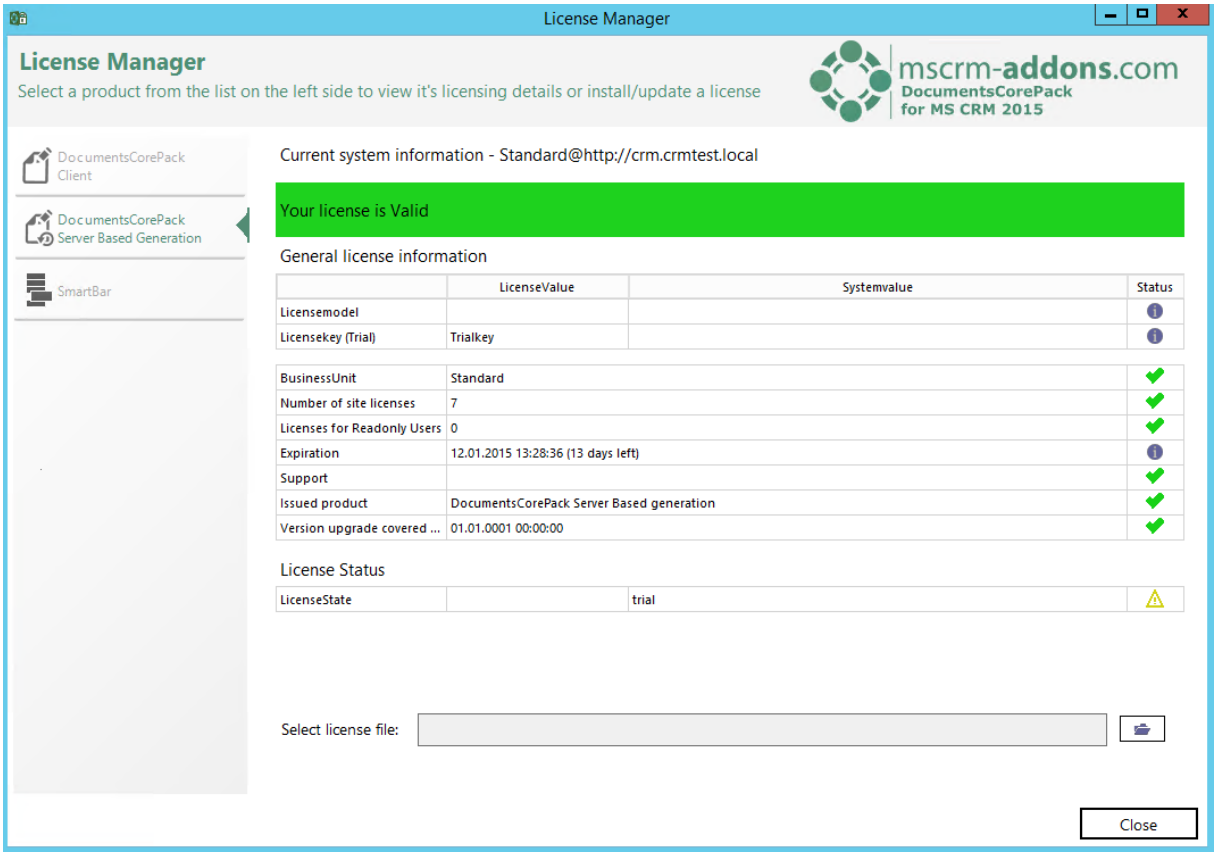
The CRM-Connection window appears:



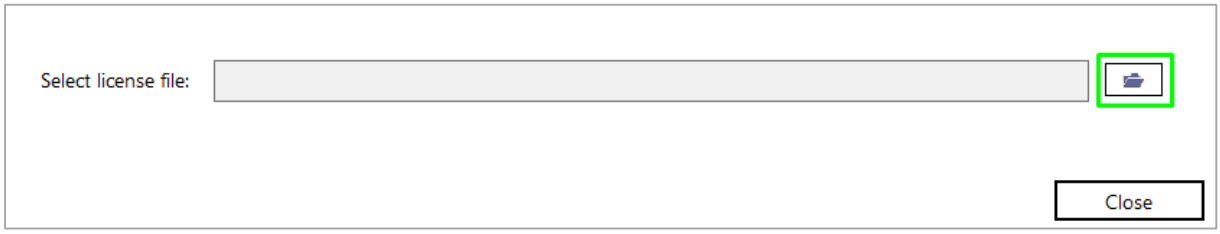
Choose the appropriate organisation and click on [OK]. Normally you just need to hit [OK].

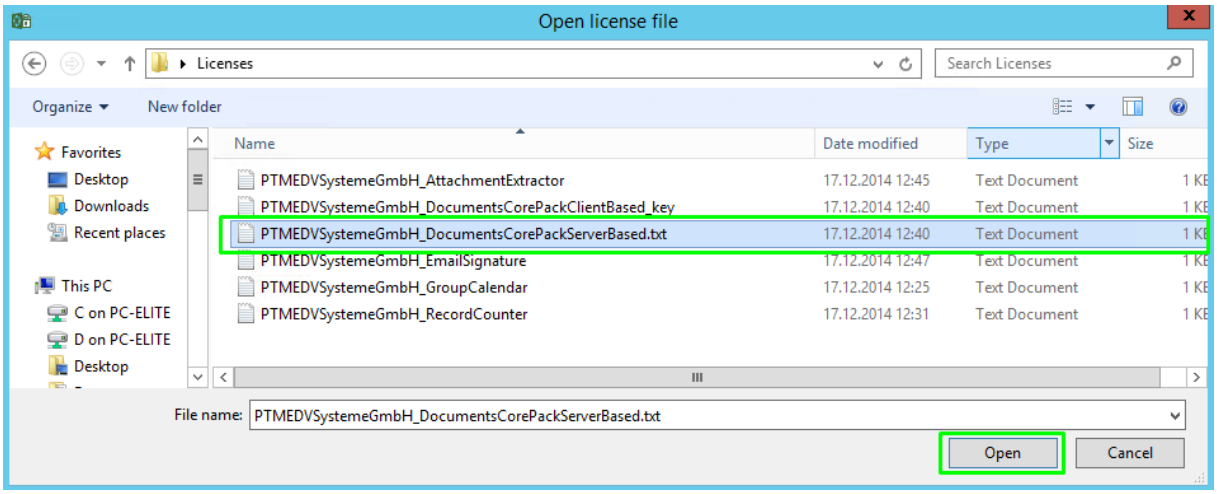


The License Manager Overview appears:

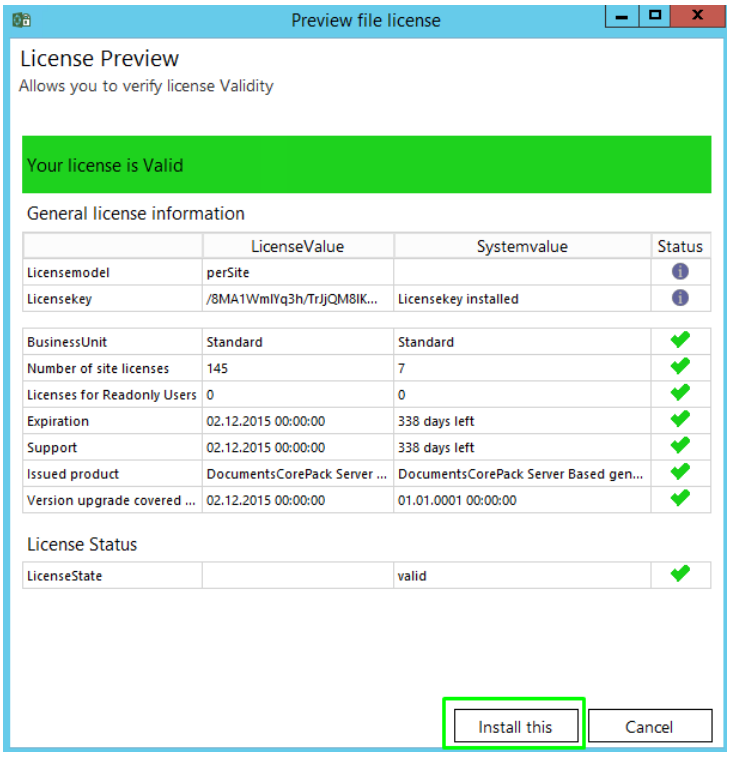


Please upload the license text file, sent by our support-team with a click on the folder-symbol. (See next screenshots)



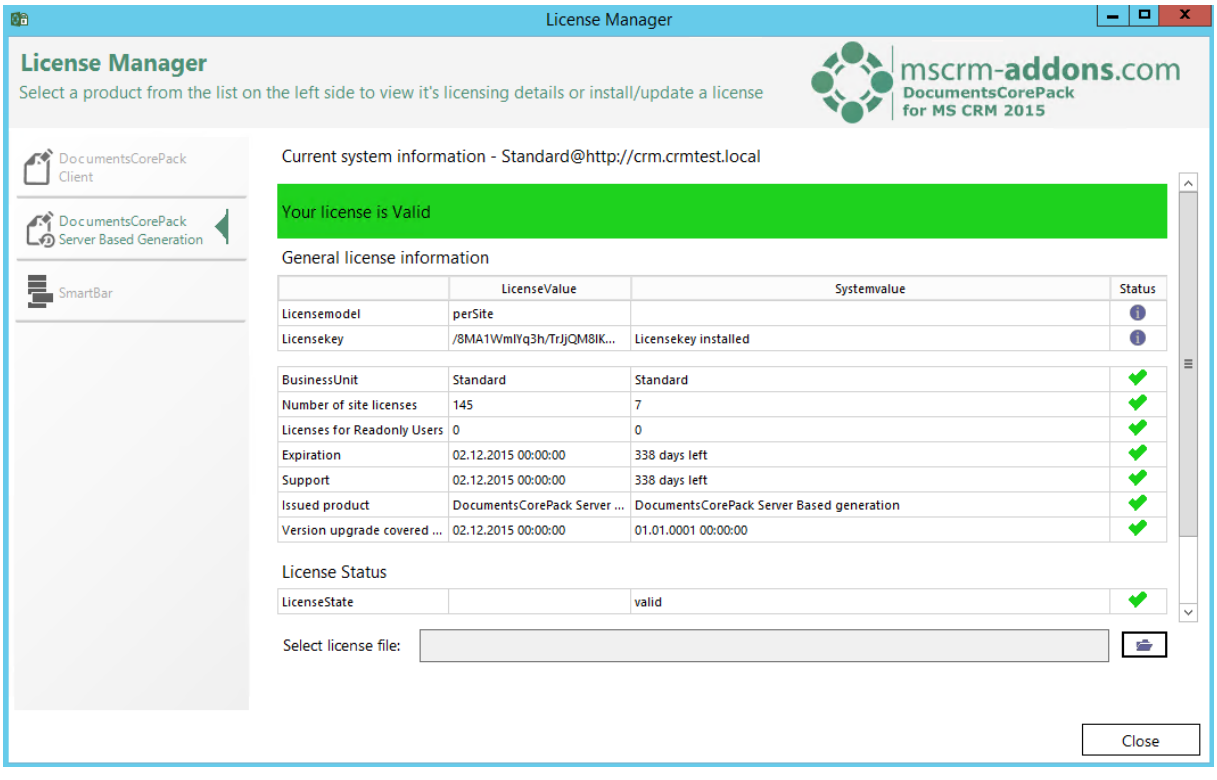


Once the permanent license for your mscmr-addons.com solution has been installed the window looks like follows:

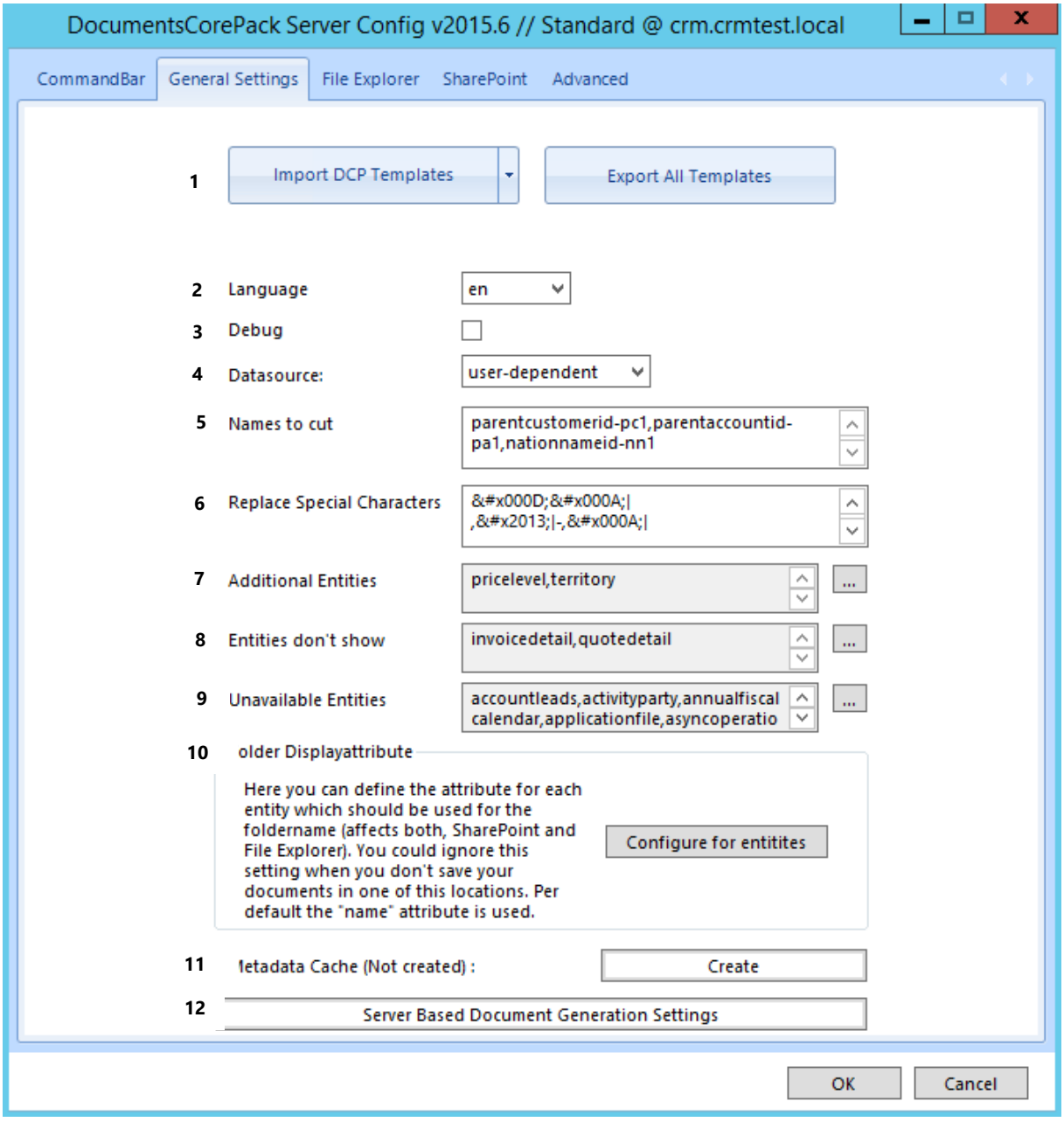


Click on [Install this] to finish the license installation.

If this is done the License Manager Overview looks like following:



5.3 General Settings-Tab



1. Import/Export Templates

Please refer to chapter 12.2.

2. Language

You can choose the language from the dropdown-box. Languages are listed in language code (en for English, de for German). To add another language, please see chapter 13.

3. Debug

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

4. Data Source

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

5. Names to Cut

This functionality is depreciated – for detailed information please read our DocumentsCorePack Client User Guide. (.dot). Details on www.mscrm-addons.com.

6. Replace Special Characters

Treated special exceptions or certain coding problems with CRM

7. Additional Entities

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

8. Entities don't show

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

9. Unavailable entities

Entities those are not included in the metadata cache.

10. Folder Displayattribute

Here the attribute for each entity which should be used for the foldername (affects both, SharePoint+File Explorer) can be. You could ignore this setting when you don't save your documents in one of this locations. Per default the "name" attribute is used.

11. Metadata Cache (Not Created):

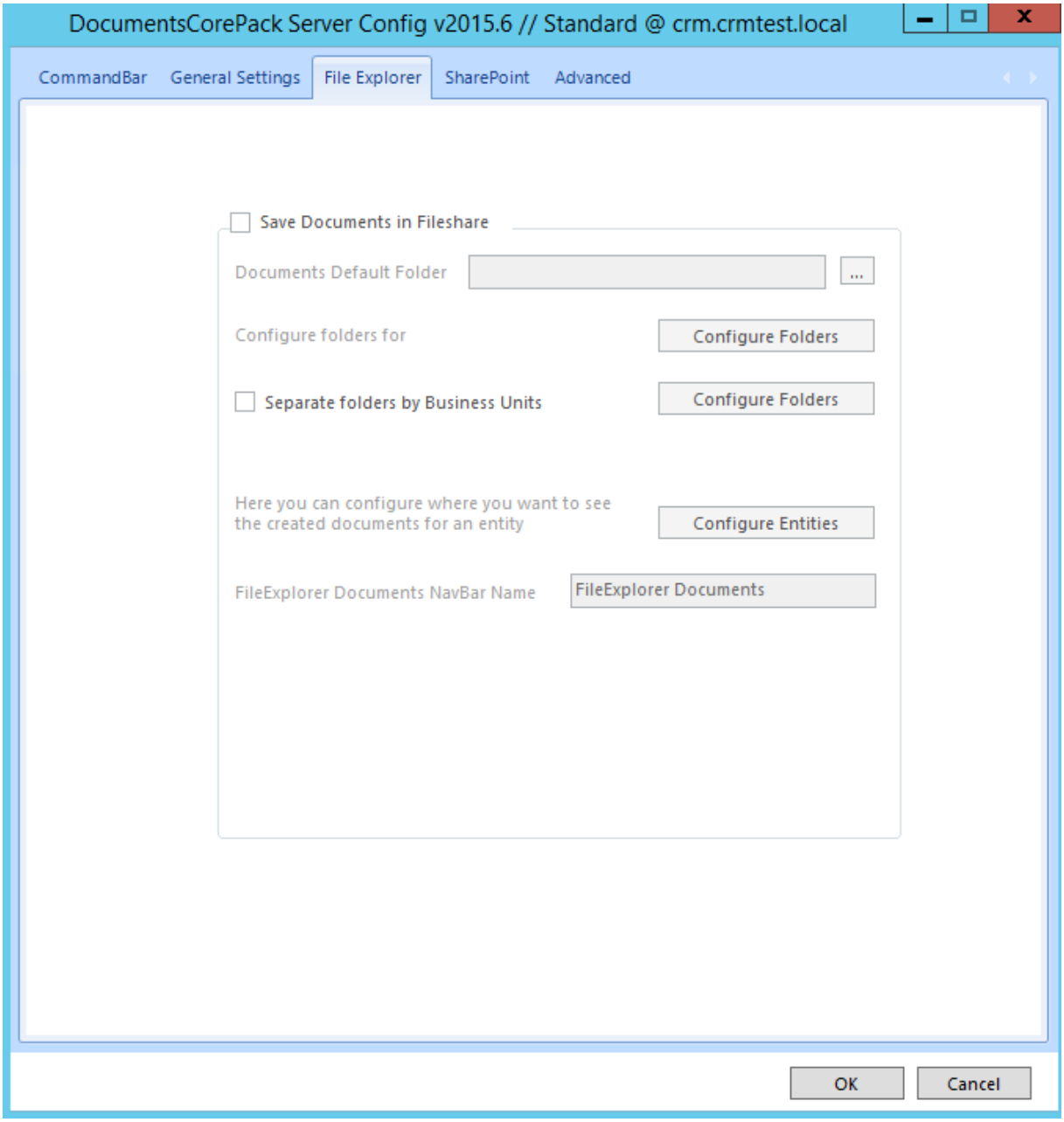
Create your metadata and save them to a local location. This is the fasted way to download metadata to the client. Note: once created this functionality needs to be updated manually!

12. Server Based Document Generation Settings

With a click on this button, users will get to the "AutoMerge Config" in CRM to set up a service for Server Based Document Generation in CRM-Online and print jobs. For detailed information, please read chapter 7. Service Configuration.

5.4 File Explorer-Tab

The FileExplorer integration provided by DocumentsCorePack generates a separate folder for each record and gives you so a structured and easy way to add files to your CRM-records.



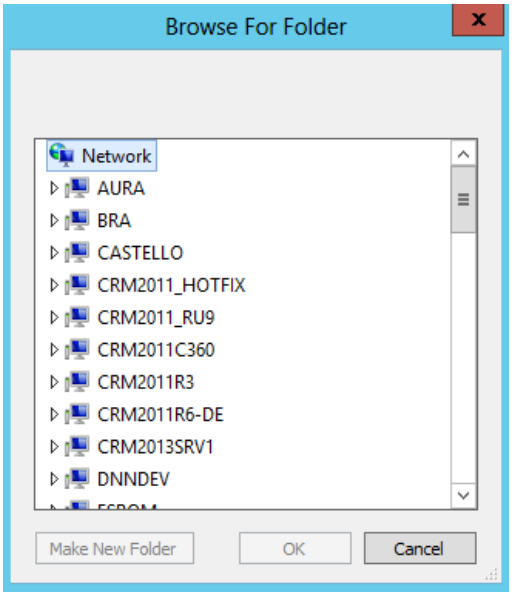
Here you can enable the File Explorer Integration. Documents generated through DocumentsCorePack Client will be saved on the specified file share.

1) Save Documents in Fileshare

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

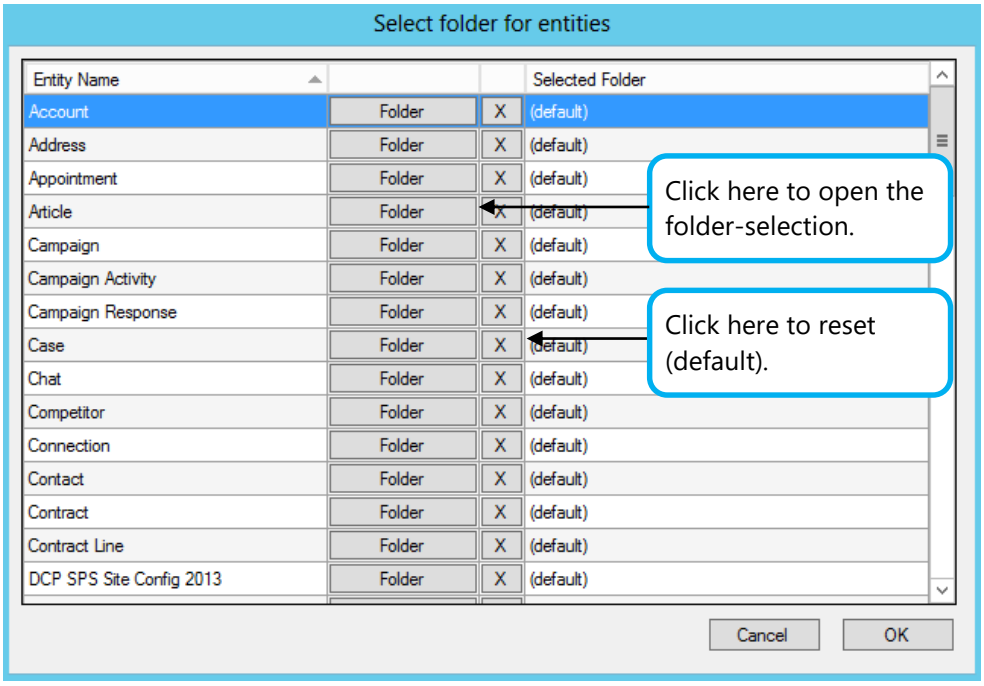
2) Documents Default Folder

Specifies the file share to which the created documents should be saved to. You can choose/create a folder with a click on [...].

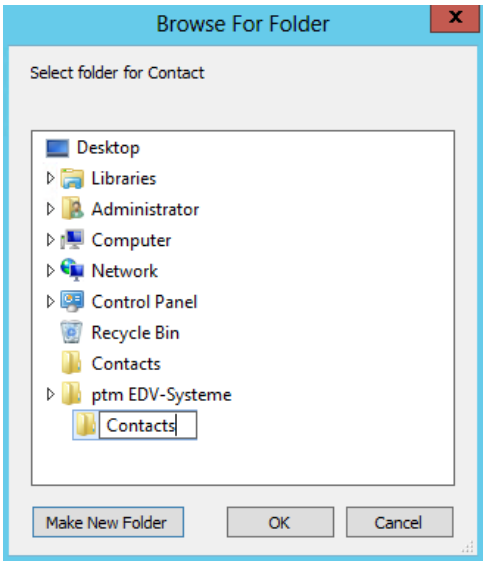


3) Configure Folder for entities

Here you can specify a specific folder for each entity.



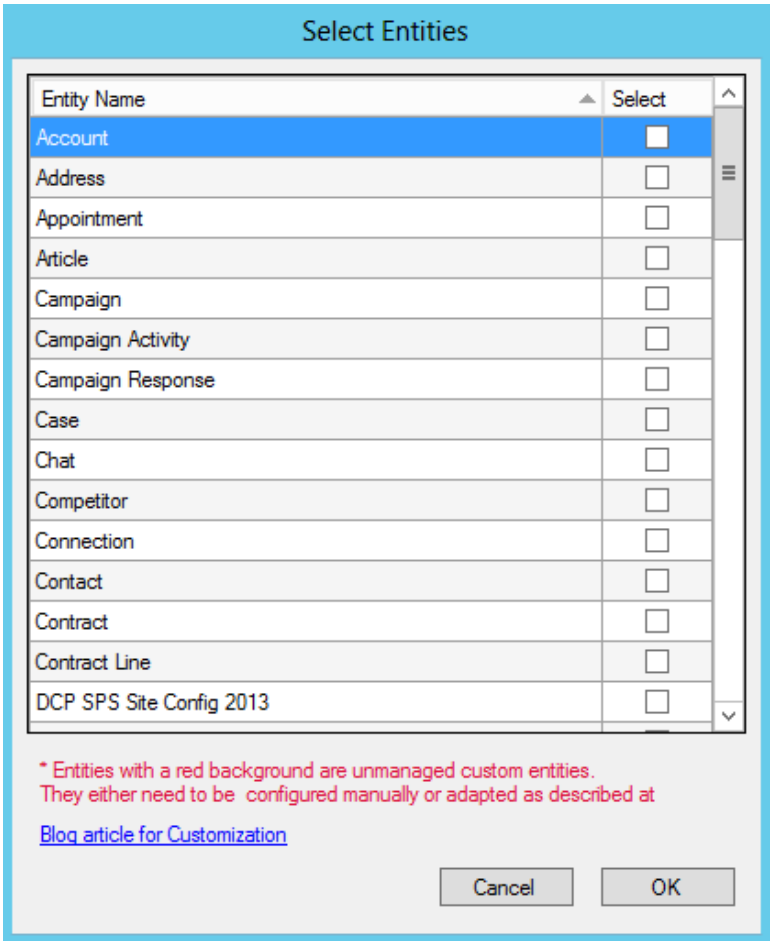
Click on [Folder] to open the selection (e.g. contact).

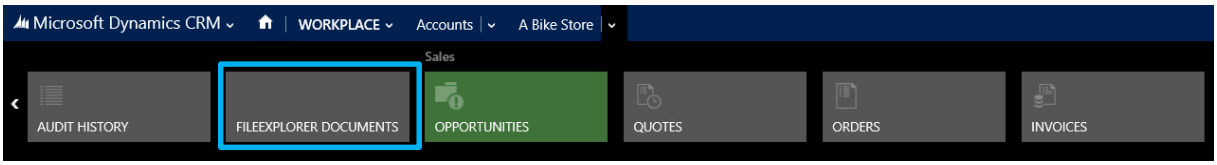


All documents for the entity account will be saved to this folder afterwards. If you set this option to (default) documents will be saved to the root of the file share.

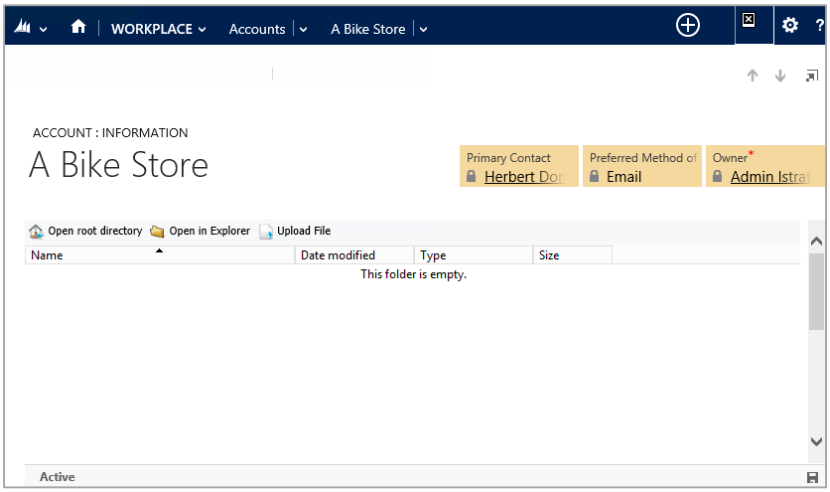
4) Configure Entities

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





Within your CRM, open any entity you have selected in the step above. Click on the drop down button next to the entity within the ribbon to see the file explorer documents.

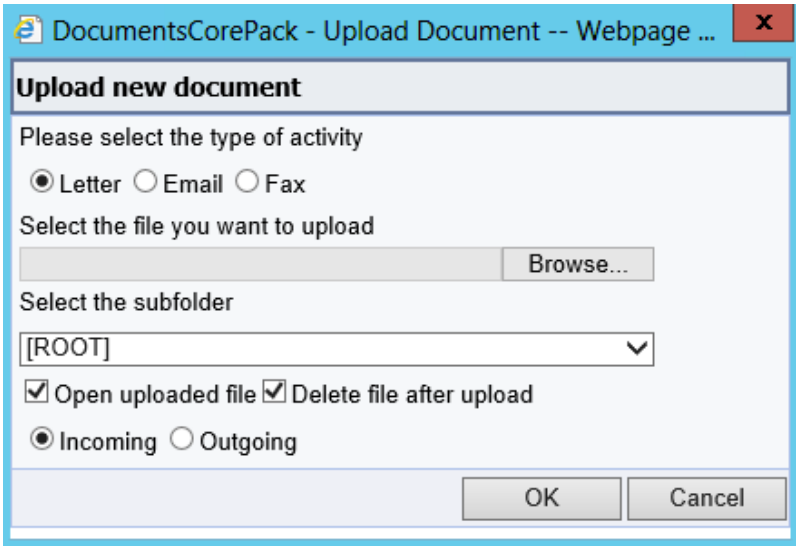


You have a toolbar with three simple options available

1. "Open root directory": If you have a subfolder structure within this folder, you can navigate through the folders. With a click on this button, the root folder will be opened again.

2. "Open in Explorer": This will open the directory direct in a Windows Explorer window.

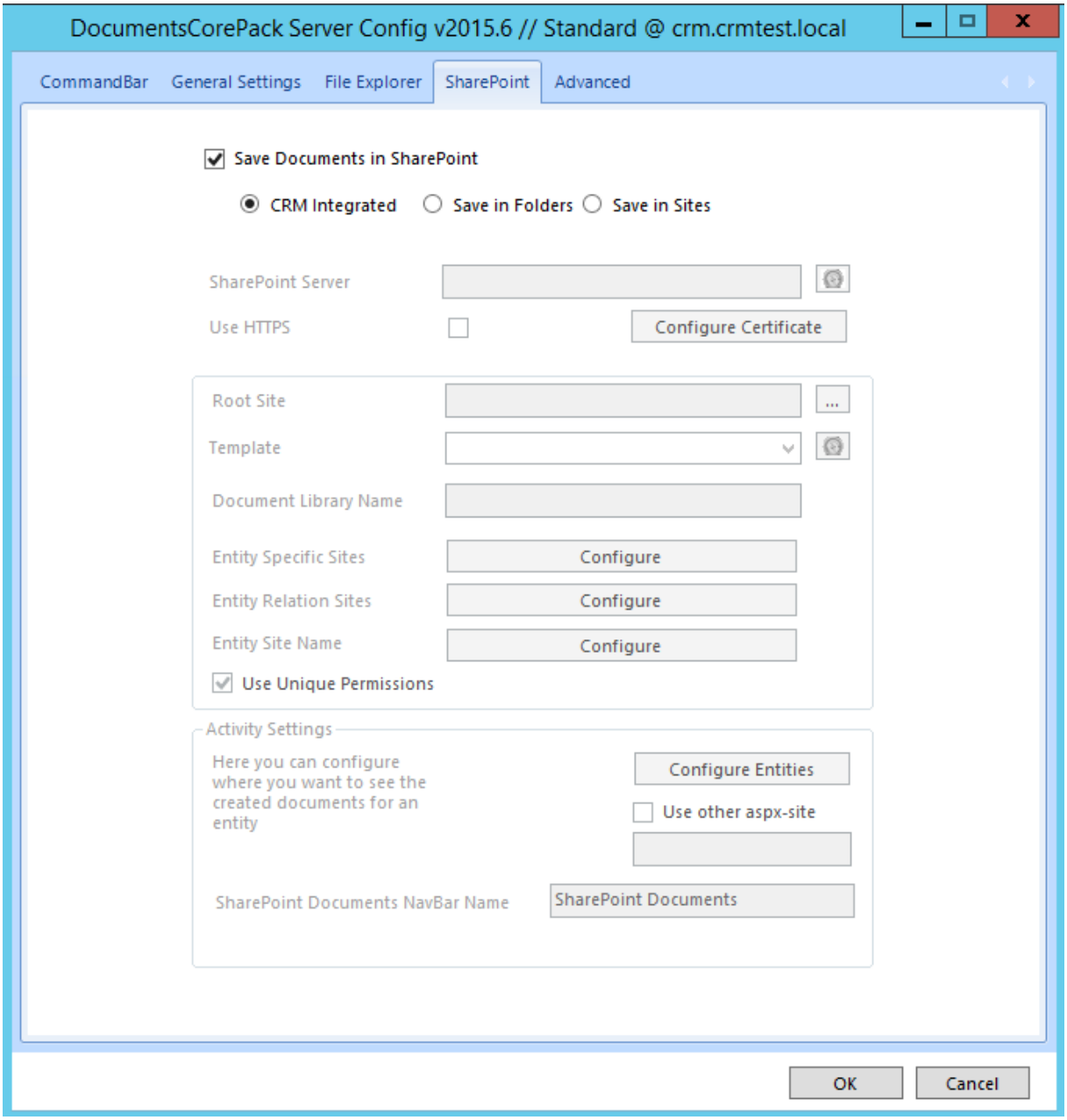
3. "Upload File": You could choose a file and upload it to this folder. An activity will automatically be created.



5.5 SharePoint-Tab

The SharePoint Integration provided by DocumentsCorePack generates a separate folder in a site or a site for each record and gives you a structured and easy way to add files to your CRM-records.

Because Microsoft has introduced his own SharePoint Integration with MS CRM 2011 the SharePoint Integration provided by DocumentsCorePack is depreciated and will not be further developed, but can be used by existing customers also in MS CRM 2015. The DocumentsCorePack Client supports both SharePoint Integrations.



You can decide between three SharePoint integration options:

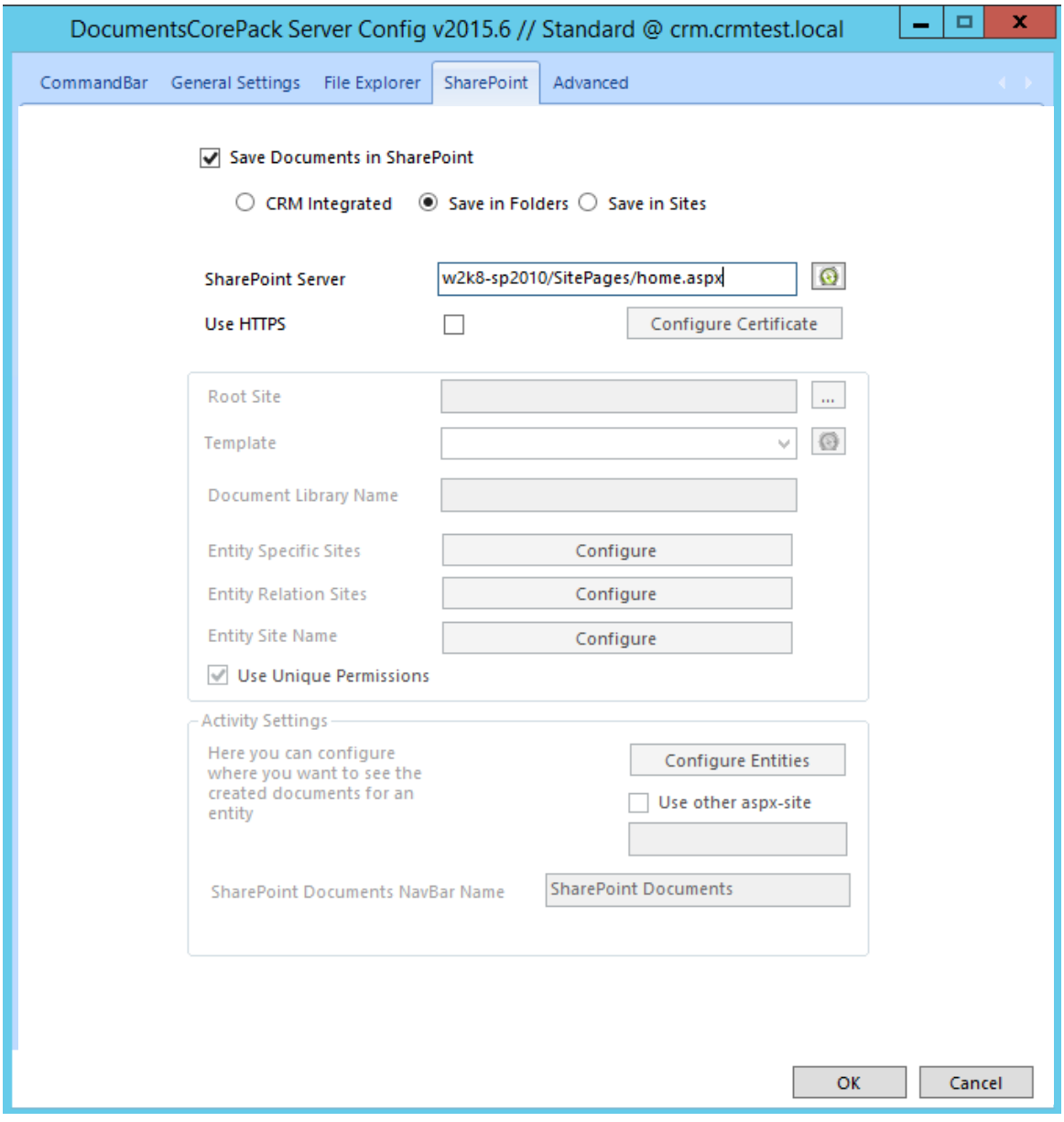
1. CRM Integrated: You have to configure the SharePoint integration within CRM to use this integration. When enabled, the documents generated via the DocumentsCorePack Client will be saved in the CRM specified SharePoint location for each record.

2. Save in folders: A new **folder** will be created for each record.

3. Save in Sites: A new **site** will be created for each record.

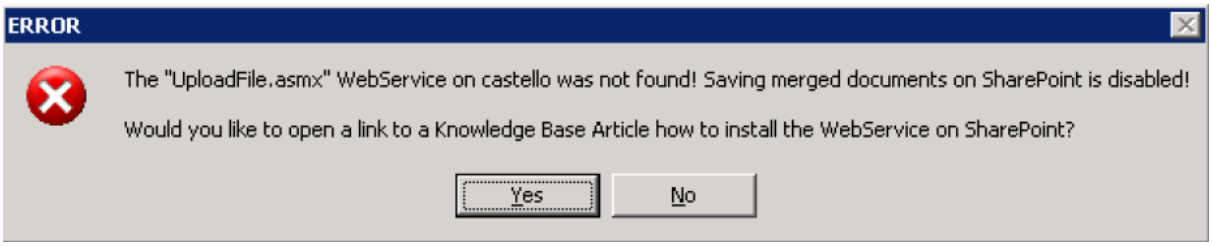
5.5.1 Save documents in SharePoint – Save in Folders Settings

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



1) SharePoint Server

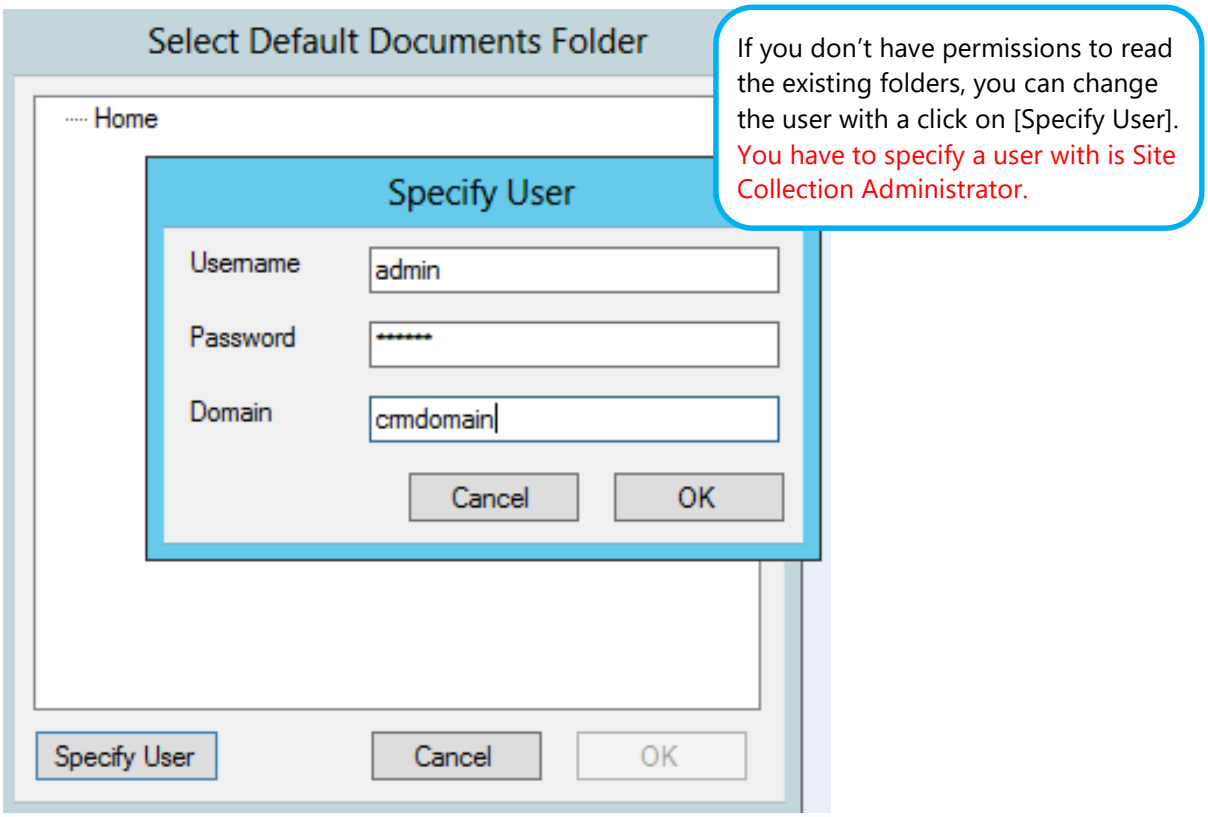
Please enter the URL to the SharePoint Server. With a click on the refresh button you could check if the WebService is installed. Notice: The DocumentsCorePack – services have to be installed on the mSharePoint to be activated. You'll get following notification if the necessary services could not be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



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

2) Documents Default Folder

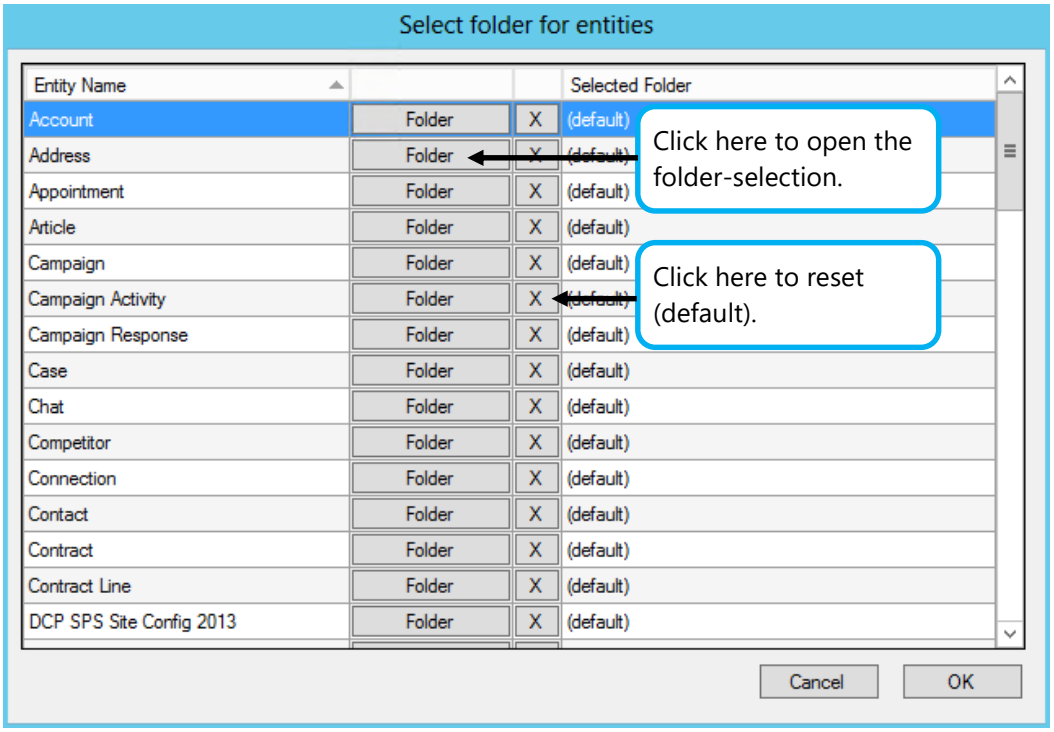
Specifies the default folder for documents saved with DocumentsCorePack. You can choose the folder with a click on [...].



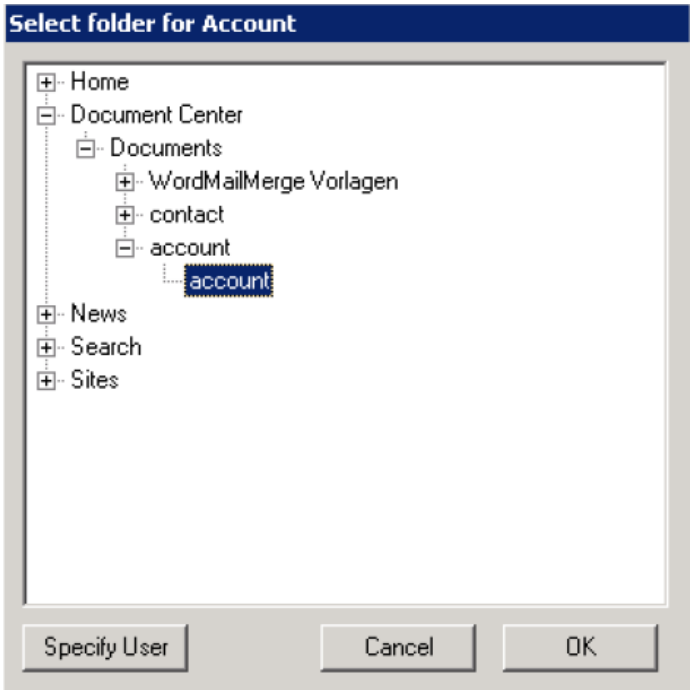
If you don't have permissions to read the existing folders, you can change the user with a click on [Specify User]. You have to specify a user with is Site Collection Administrator.

3) Configure Folder for Entities

Here you can specify a specific folder for each entity.



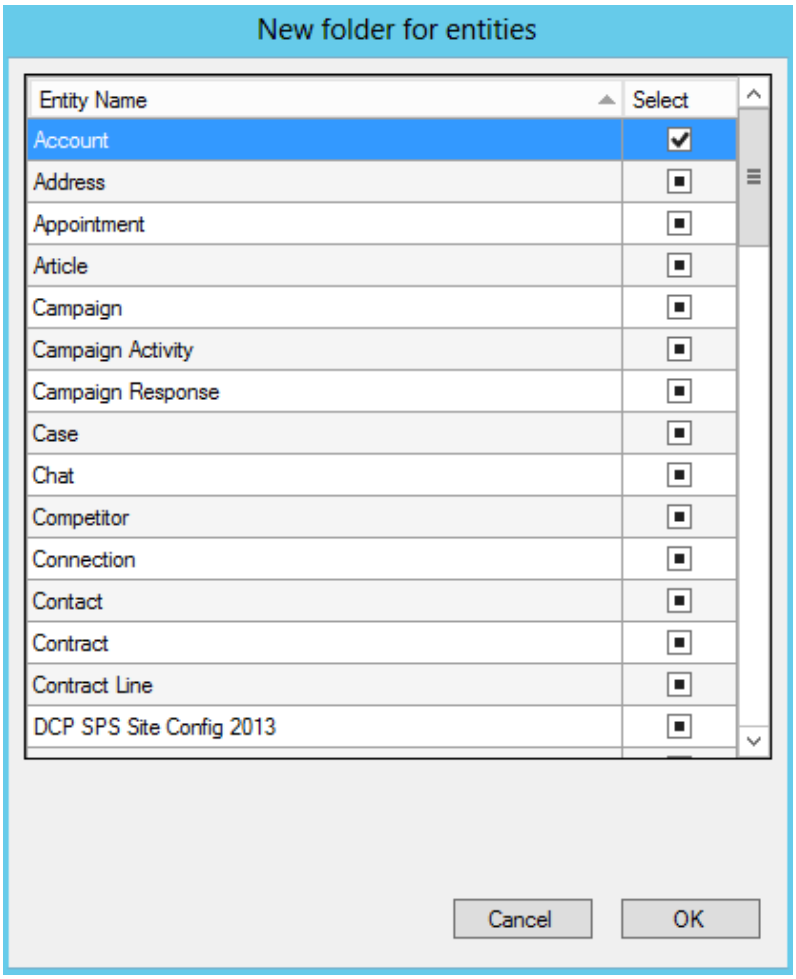
Click on [Folder] to open the selection (e.g. account).



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

4) New Folder for each row

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

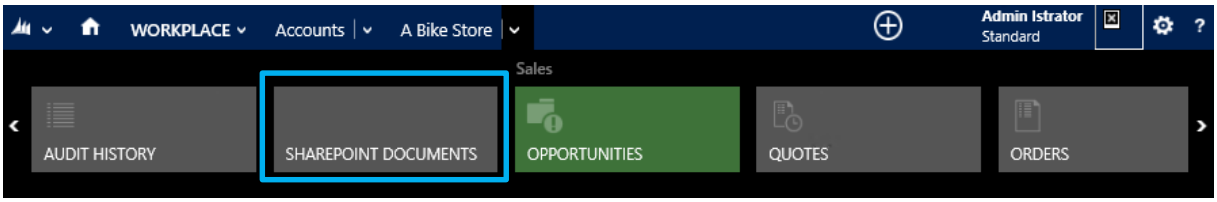


Options:

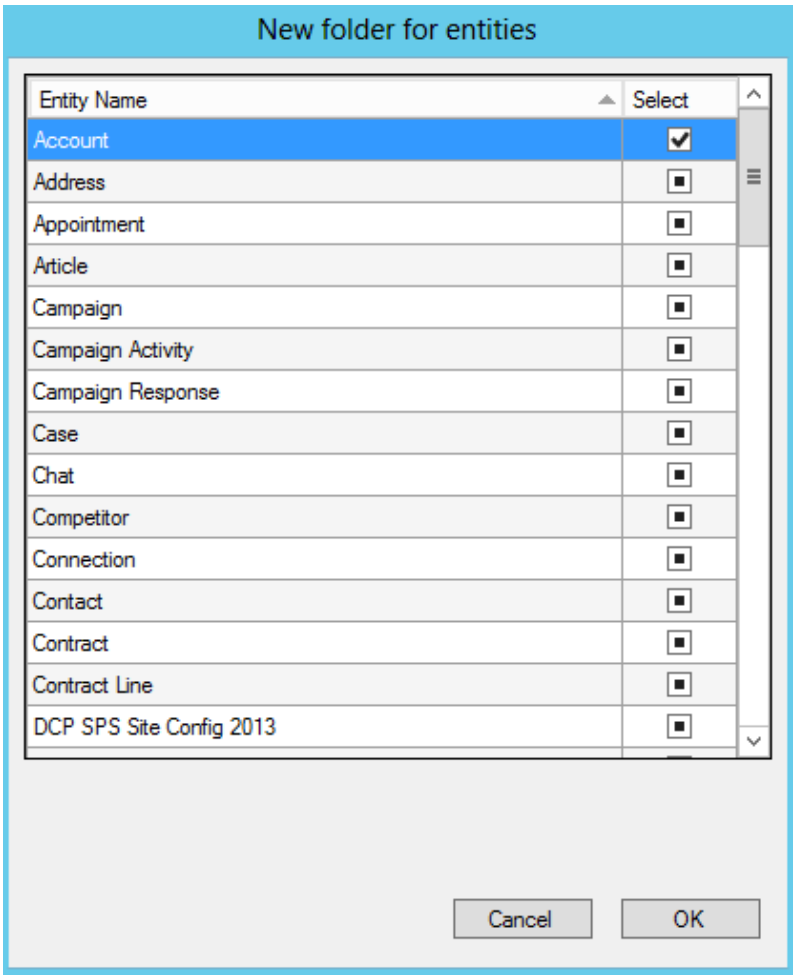
- Checked: A new folder will be created for each record.
- Unchecked: Documents saved for this entity will be saved to the folder specified in no.: 2 and 3 (see above).

5) Visualization options

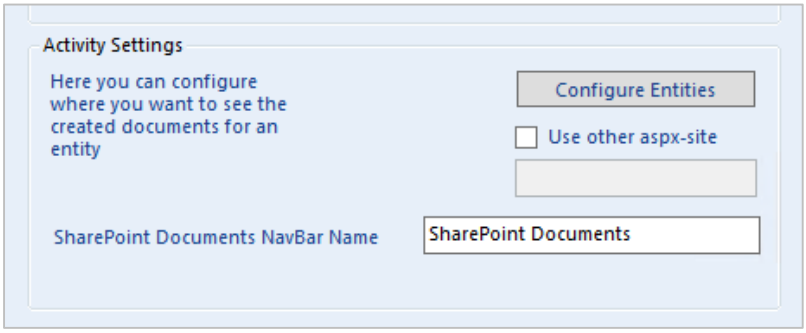
Here it's possible to choose where you want to see the created/saved documents. The documents will be shown within the entity details of the entities. A menu option will appear in the ribbon.



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



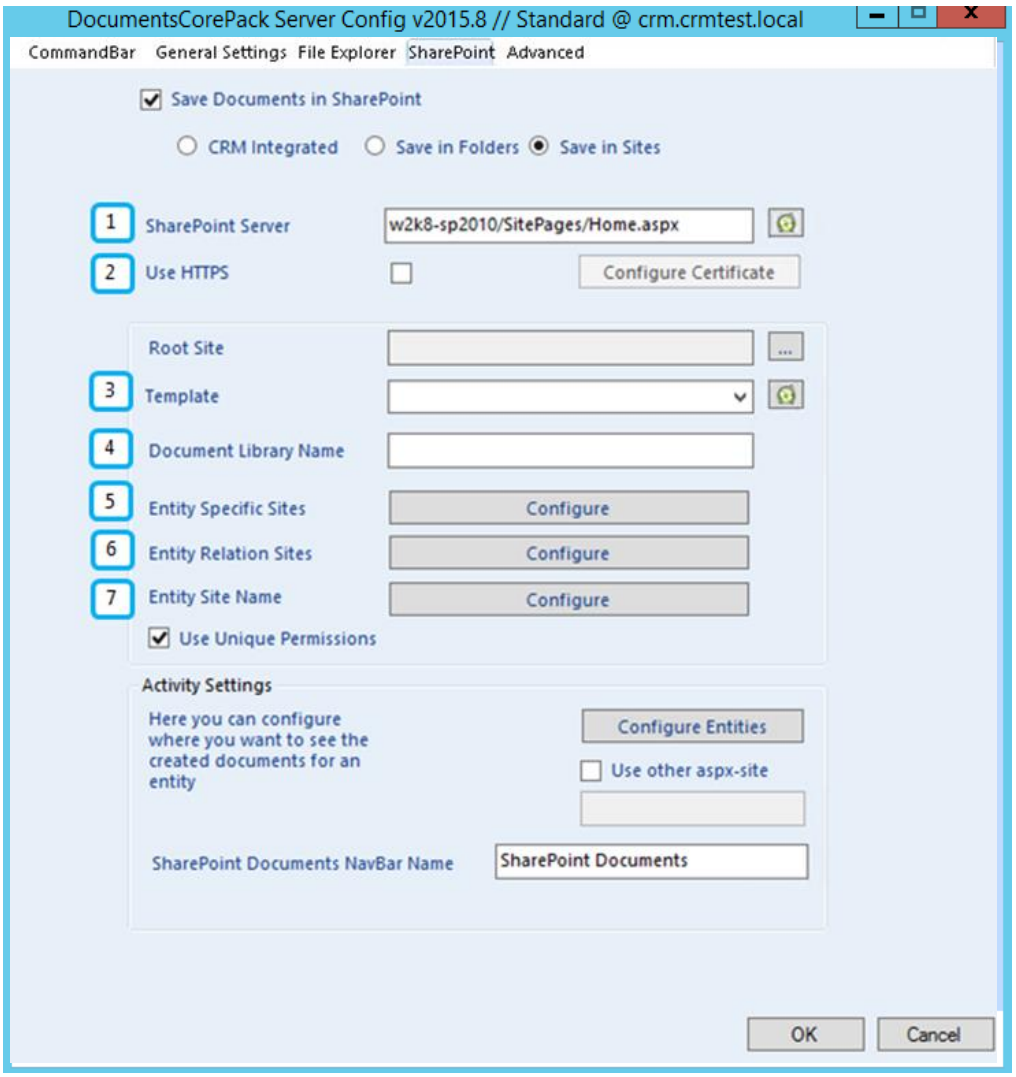
By default, the view "AllItems.aspx" is used to view your SharePoint documents. Use the "Use other aspx-site" setting to change the default view.



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

5.5.2 Save documents in SharePoint – Save in Sites Settings

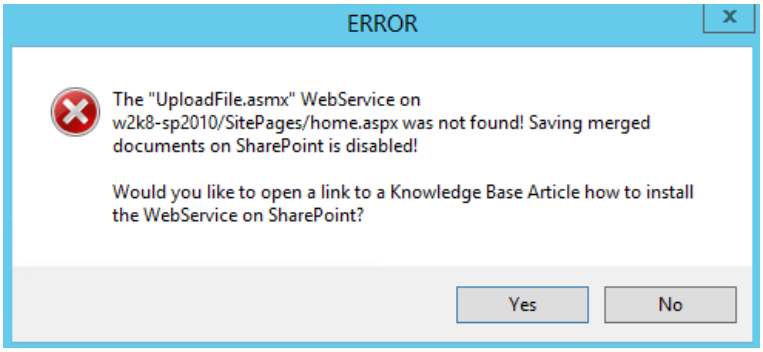
Here it's possible to define how the documents should be saved to the SharePoint Sites. You have to select "Save in Sites".



1) SharePoint Server

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

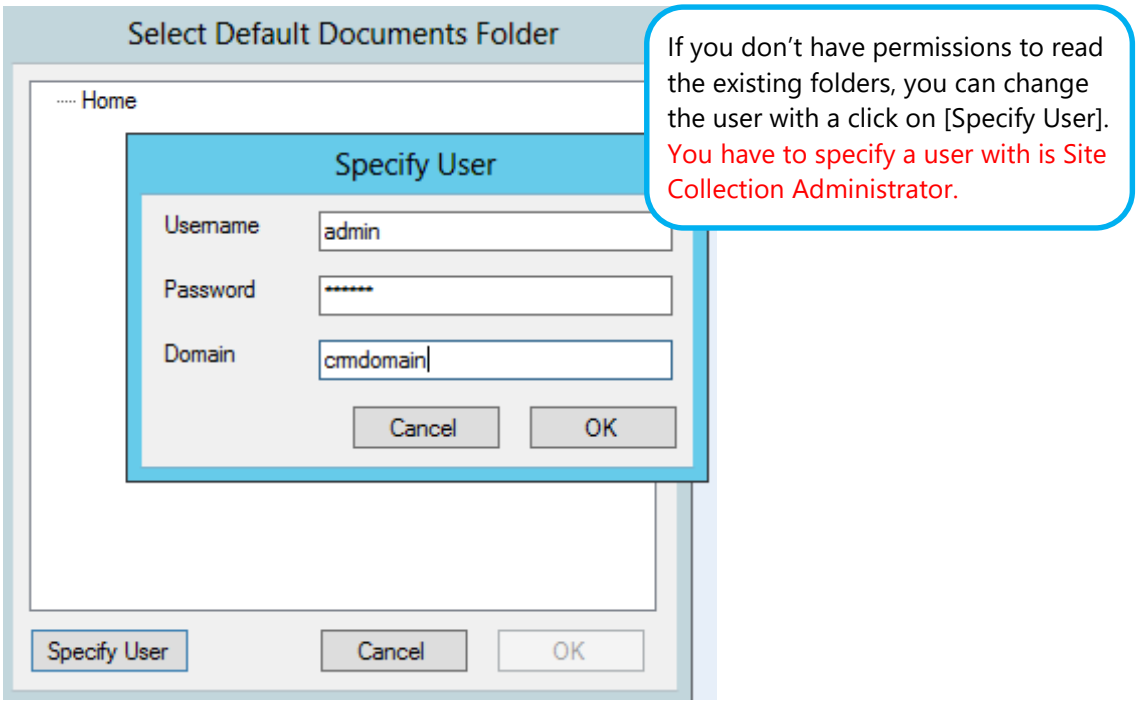
Notice: The DocumentsCorePack – services have to be installed on the SharePoint to activate. You will get the following notification if the necessary services could not be found:



In this case, you'll have to install the DCP SharePoint services on the SharePoint -> see Knowledge Base-article.

2) Root Site

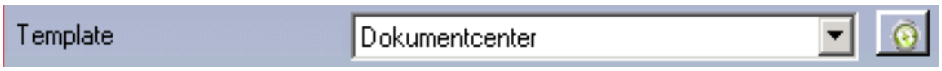
The Root Site specifies the default site for documents saved with DocumentsCorePack. You can choose the site with a click on [...].



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

3) SharePoint Template

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

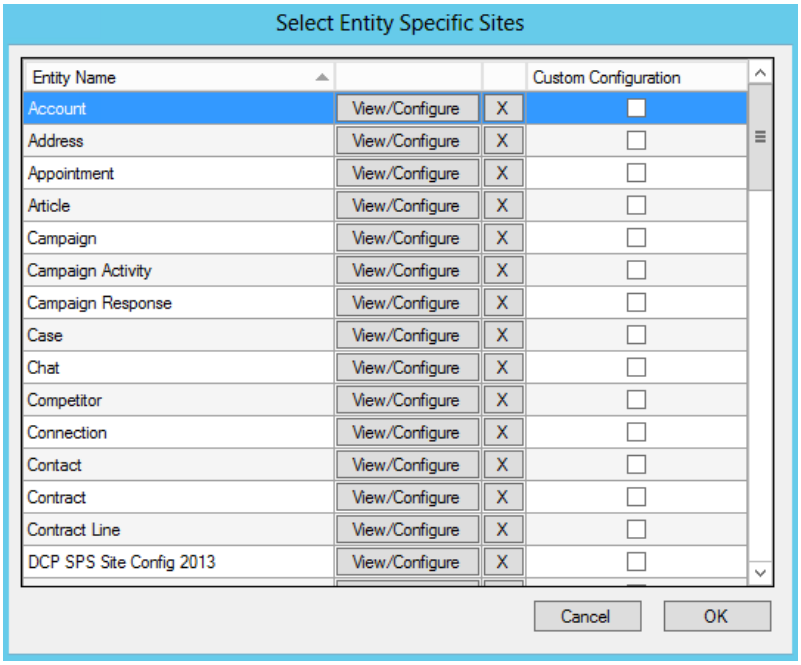


4) Document Library Name

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

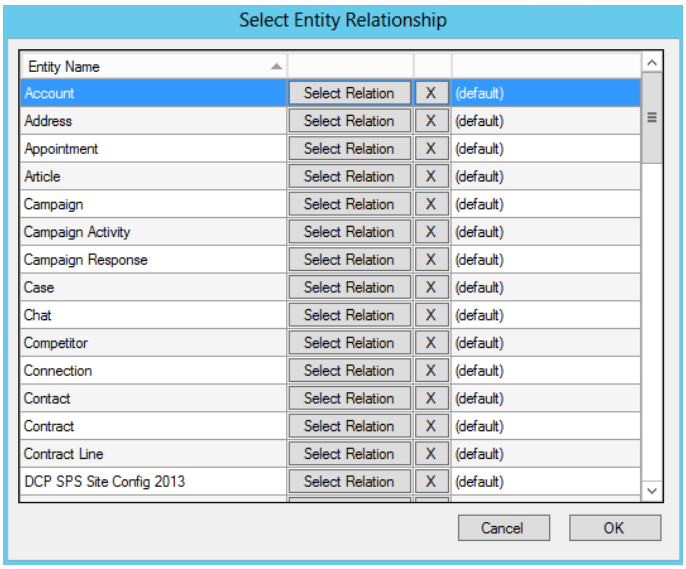
5) Entity Specific Sites

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



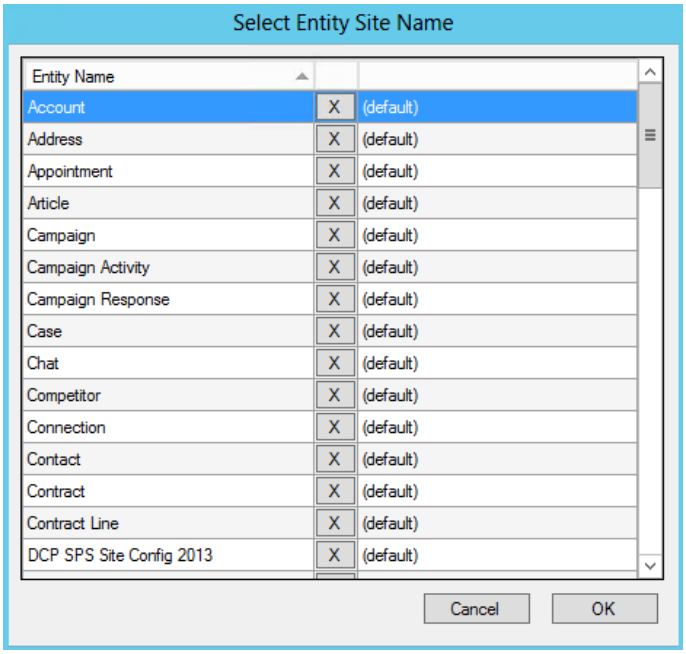
6) Entity Relation Sites

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

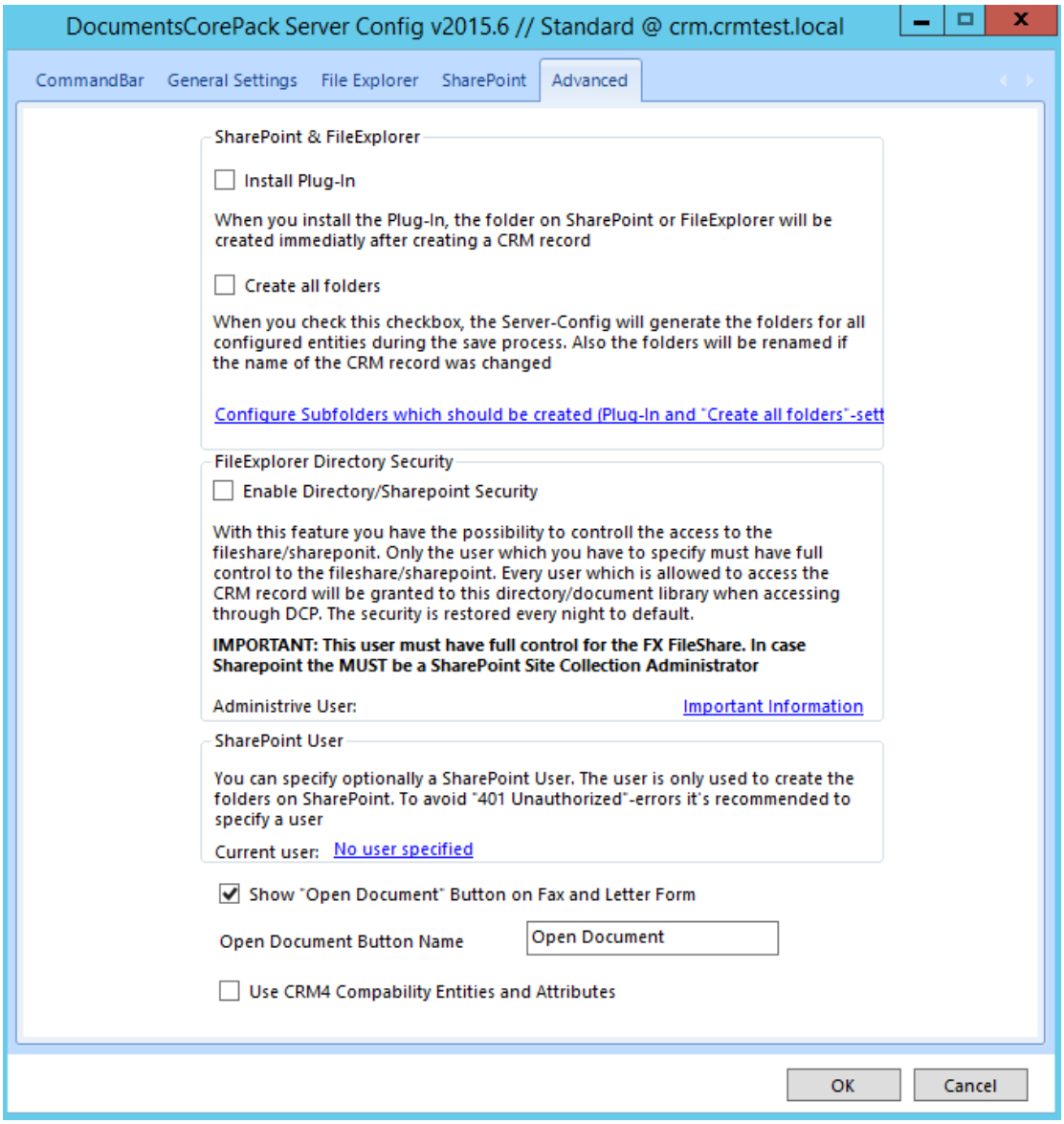


7) Entity Site Name

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



5.6 Advanced-Tab



1) Install Plug-In

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

2) Create all folders

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

3) Enable Directory Security

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

4) SharePoint User

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

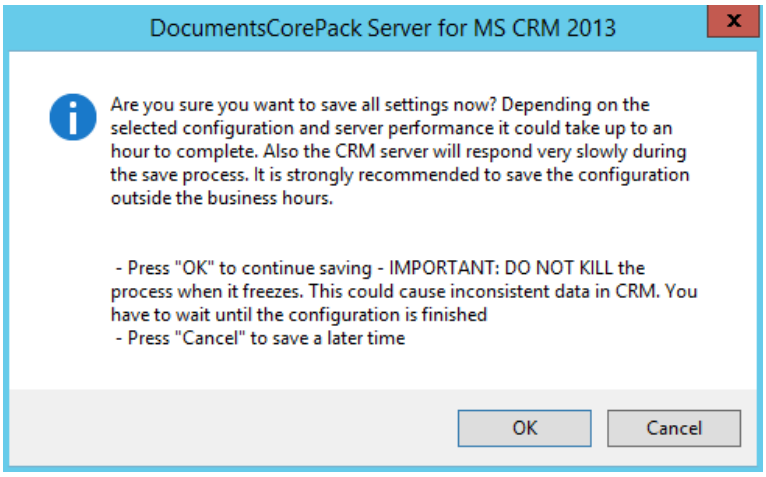
5) Show Open Document Button

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

6) Use CRM 4.0 Compatibility

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

Whenever users save the settings following window appears:

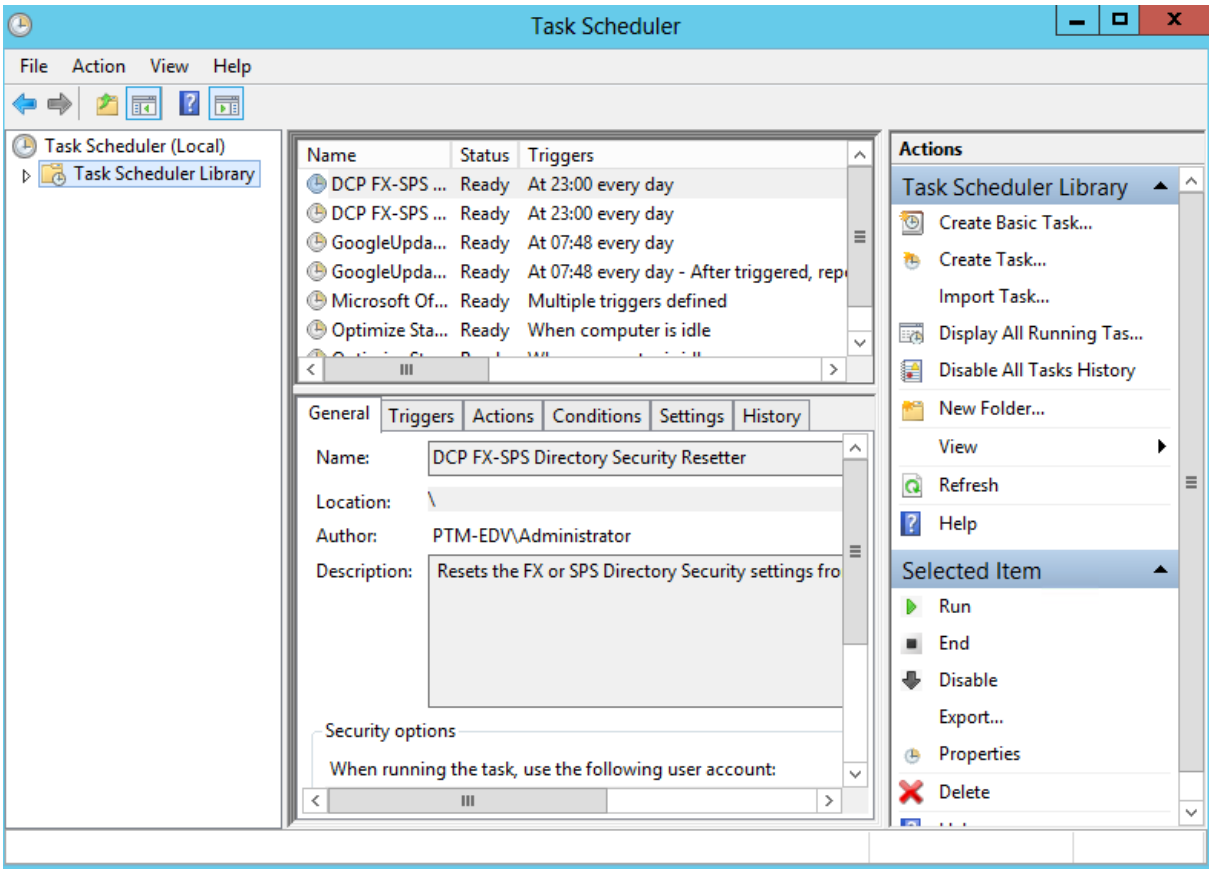


5.6.1 Additional steps for DocumentsCorePack Directory Security

With the Directory Security feature of DocumentsCorePack for MS CRM 2015 you can prevent users to see the files from CRM records which are not accessible for them. Users will not be able to navigate to the associated directory within the file share or SharePoint because DocumentsCorePack will overtake the security for you. In other words: When a user is not able to see the CRM record, he/she will also not be able to see the documents.

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

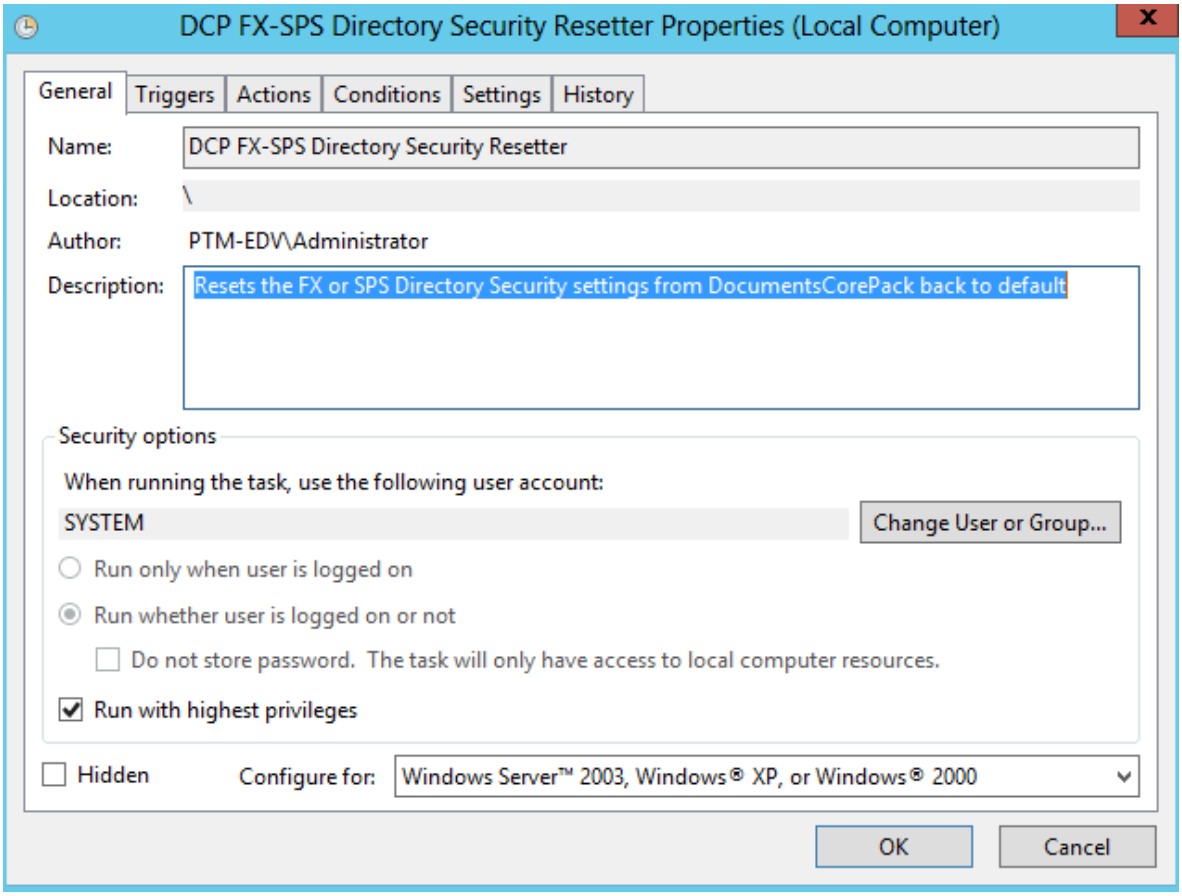
That's the reason why DocumentsCorePack resets the permission every night at 11pm (server time). For this, you have to specify a user under which the task should run. You have to do this manually. Please open the Windows Task Scheduler



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

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

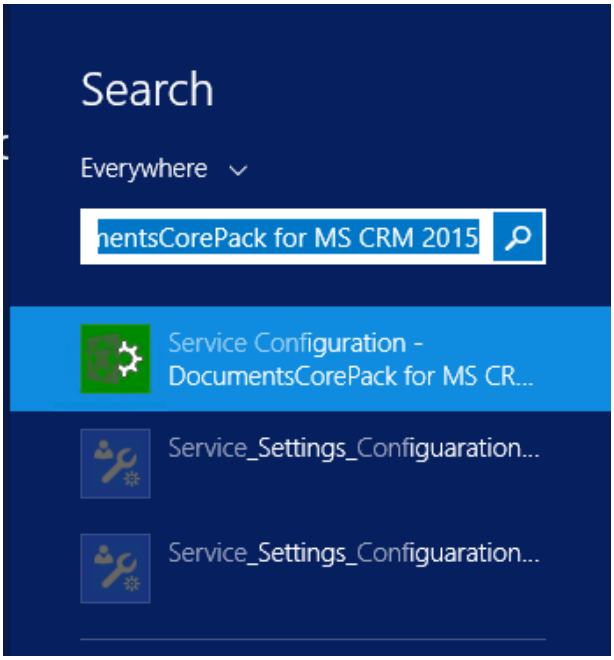
See next screenshot:



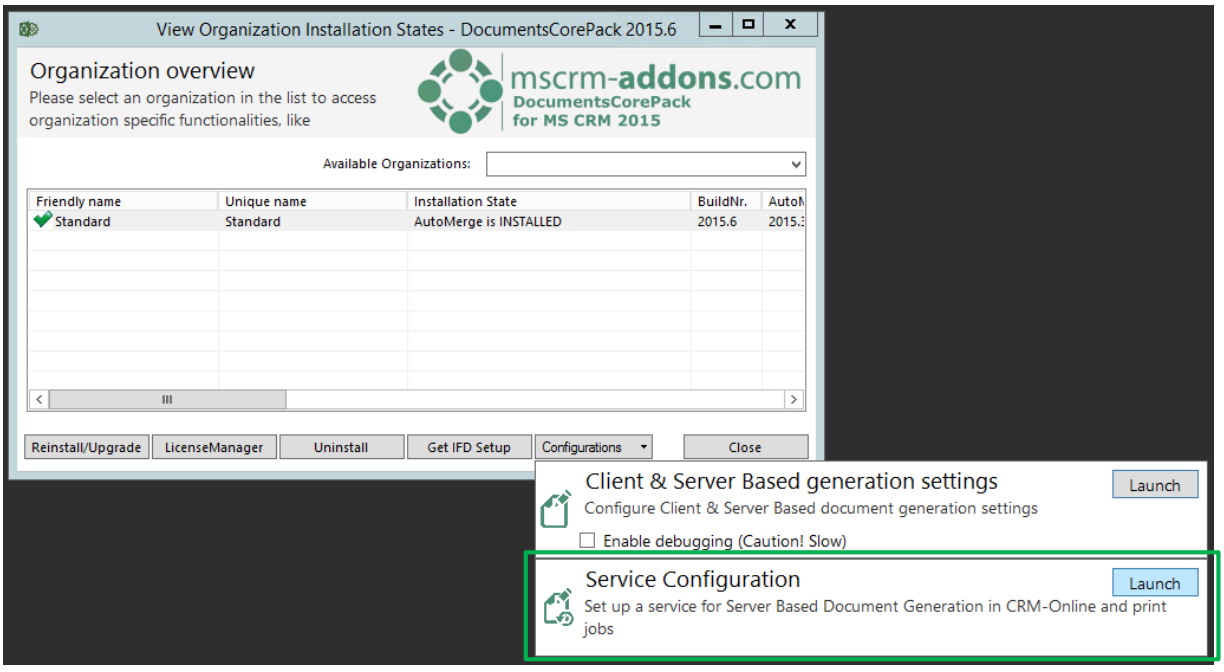
Now the directory security will be reset every night to the default permissions.

6 ServiceConfiguration

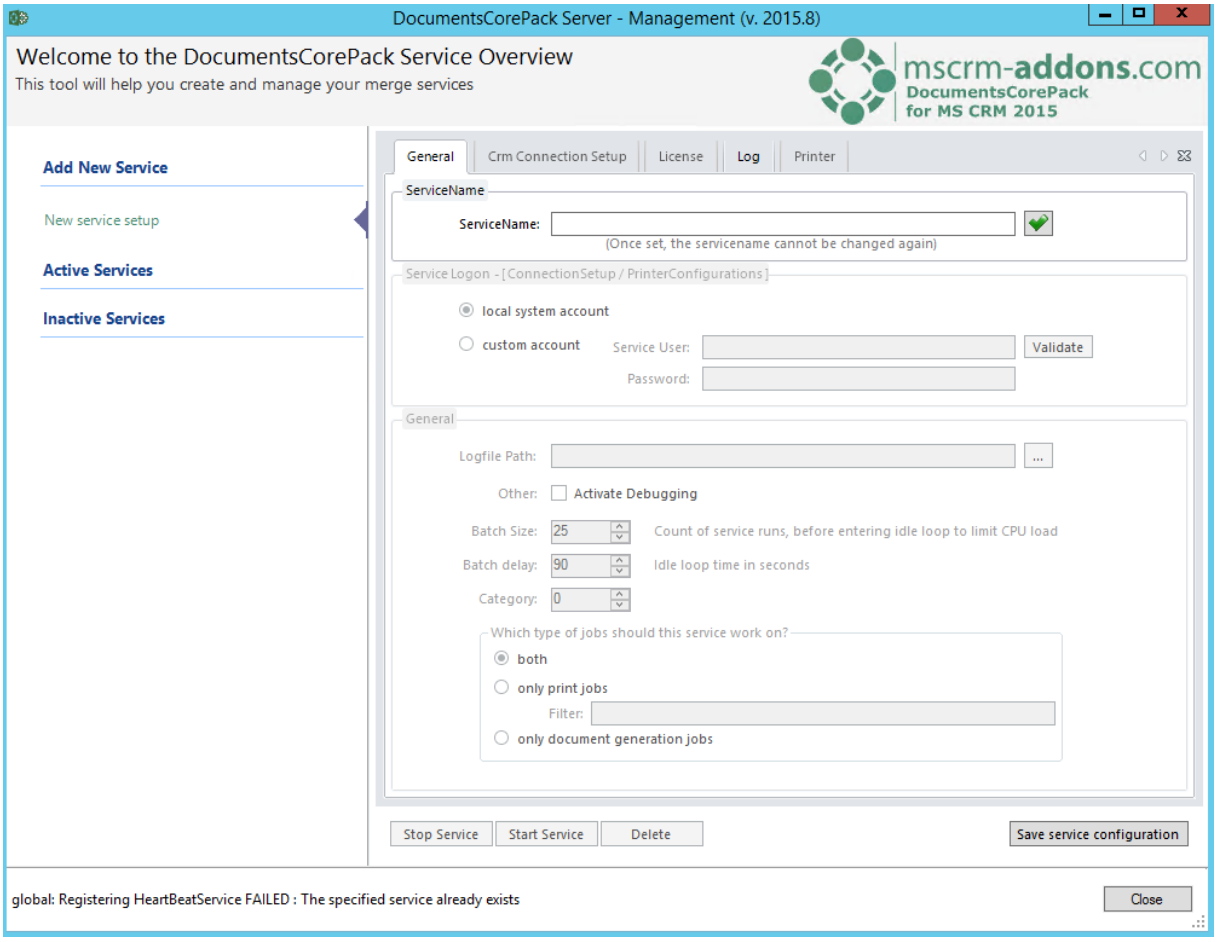
To open the ServiceConfiguration, please search for **"ServiceConfiguration – DocumentsCorePack for MS CRM 2015"** in the Windows start-menu and run this application.



Another way to get to the Service Configuration is to open the **"Configuration – DocumentsCorePack for MS CRM 2015"** in the Start pane. This will open the Organization overview. There, click on the required organization and [OK] → and the Configurations dropdown button) and choose **Service Configuration** and **[Launch]**. See next screenshot:



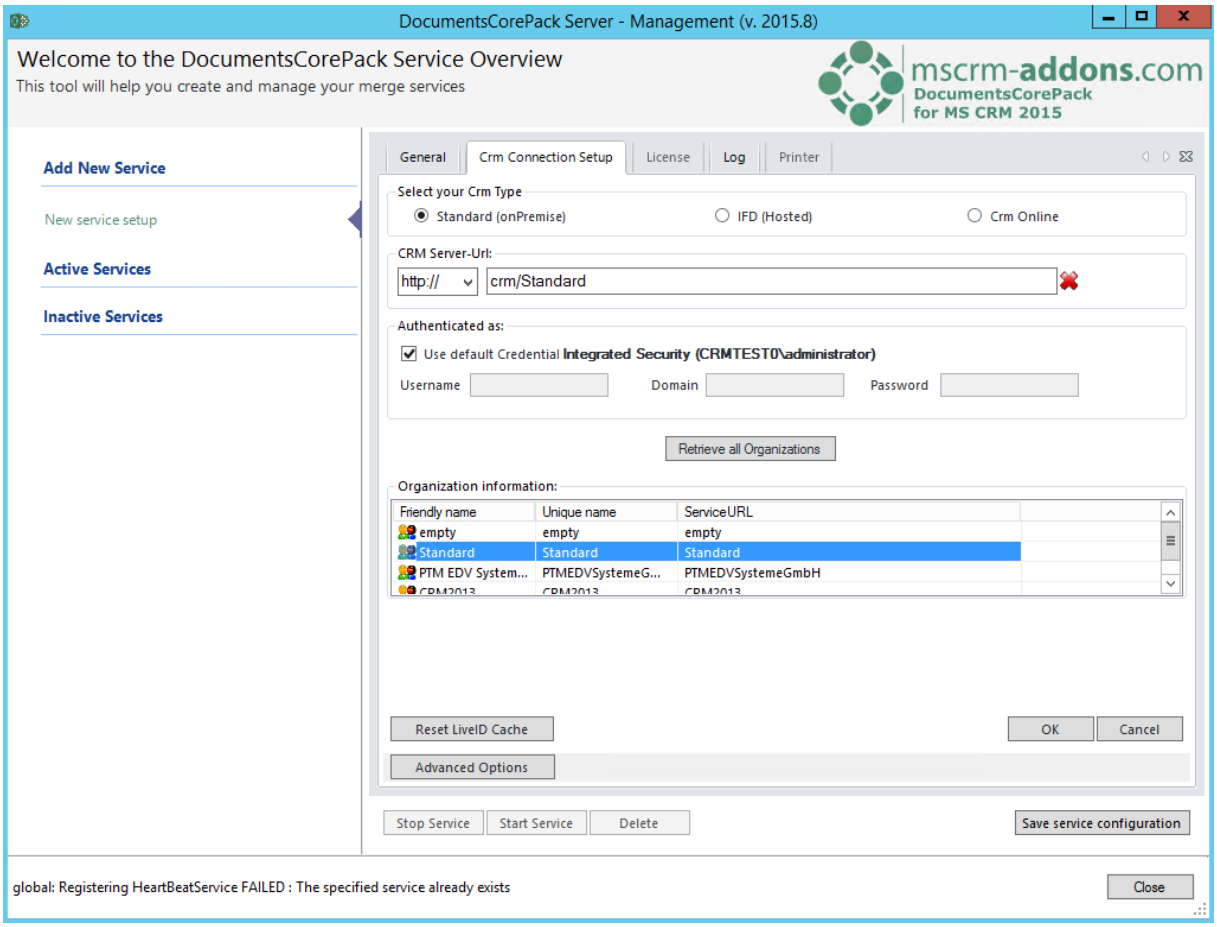
Following window appears:



6.1 General-Tab

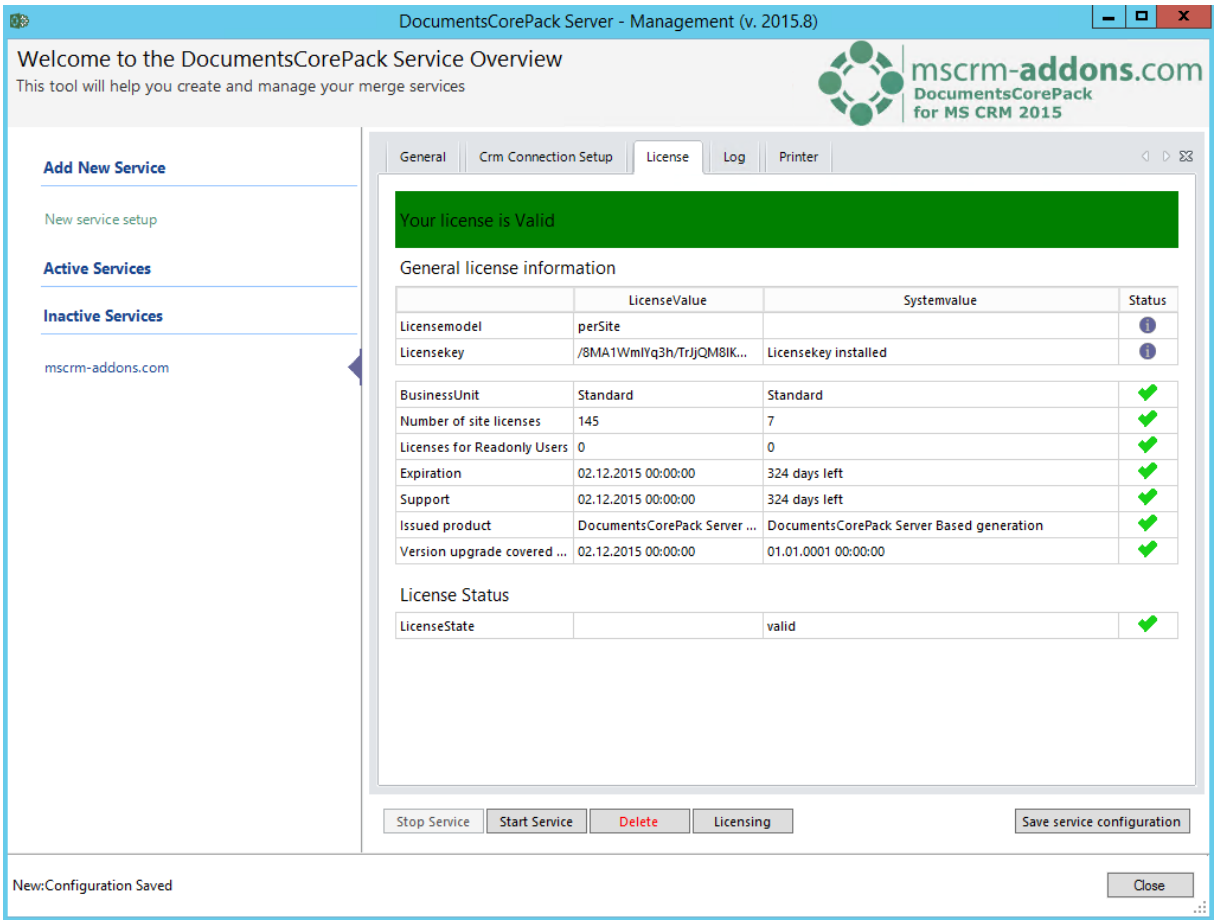
Within the "General"-tab, (see screenshot above) you are able to put a name for your service and to specify the logfile-path. You are also able to activate debugging if there is a problem with your service. Click on [Save service configuration] to continue.

6.2 CRM Connection Setup-Tab



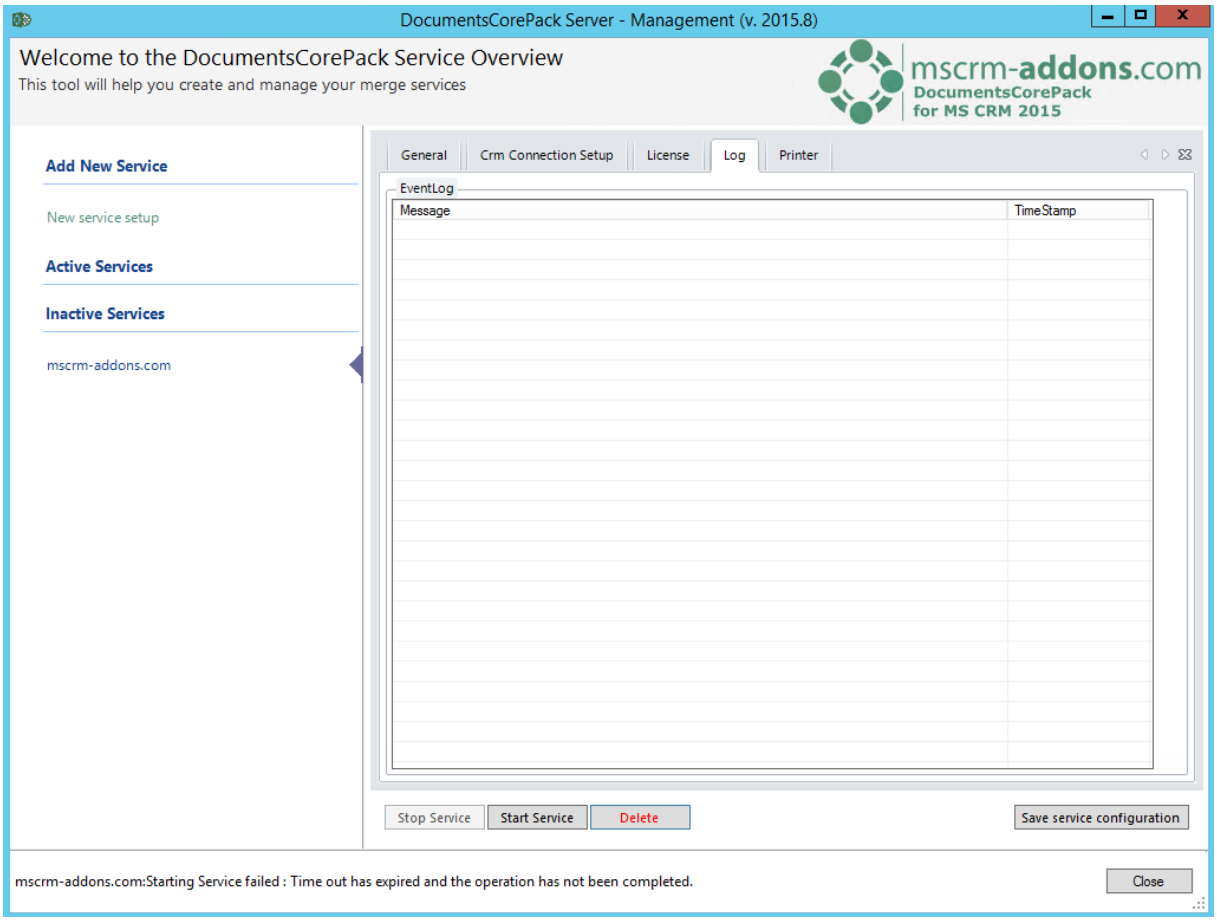
Again, you have to specify your CRM-connection in the CRM Connection Setup. Click on [Save service configuration] to continue.

6.3 License-Tab



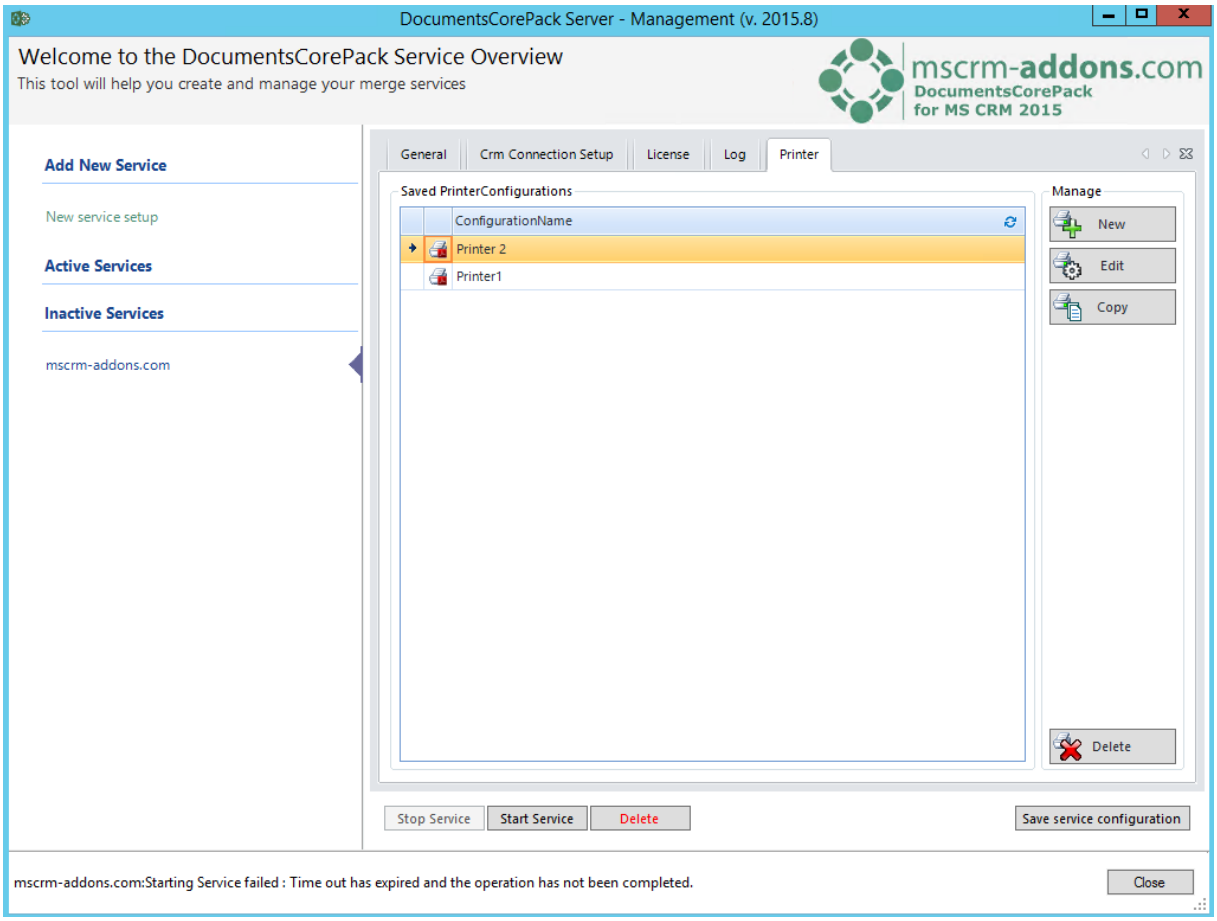
In the "License"-tab, you are able to see the information about your license.

6.4 Log-Tab



In the "Log"-tab, you are able to see the latest events.

6.5 Printer



DocumentsCorePack now offers a service-based printing option which is available additionally to the already known plugin-based printing-option. The additional option is available within DocumentsCorePack for MS Dynamics CRM 2013 v5.30 and higher and is based on a service which is running in the background.

For more information, please read our DocumentsCorePack ServerBased User Guide chapter 7.3 "Service based printing with DCP SB". Please download on www.mscrm-addons.com.

7 Upgrade

For upgrading your DocumentsCorePack version, just rerun the setup. The final step of the upgrade is to execute the DocumentsCorePack Configuration as shown in chapter "6.1.1 DocumentsCorePack Configuration". **The configuration is necessary to upgrade DocumentsCorePack properly!**

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

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

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

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

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

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

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

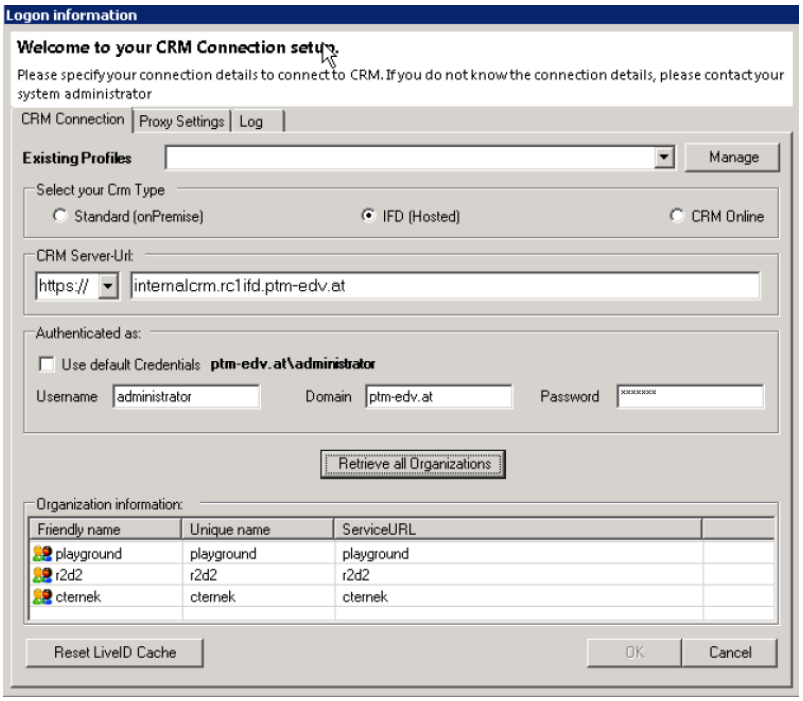
- Internal Url used to access Microsoft Dynamics CRM:
  https://internalcrm.rc1ifd.ptm-edv.at
- External Url used to access Microsoft Dynamics CRM:
  https://[orgname].rc1ifd.ptm-edv.at
- AD FS Server: https://win2008domain.ptm-edv.at
- The Addon itself also requires a dns name:
  https://documentscorepackserver.rc1ifd.ptm-edv.at

Basic installation/configuration of our addon:

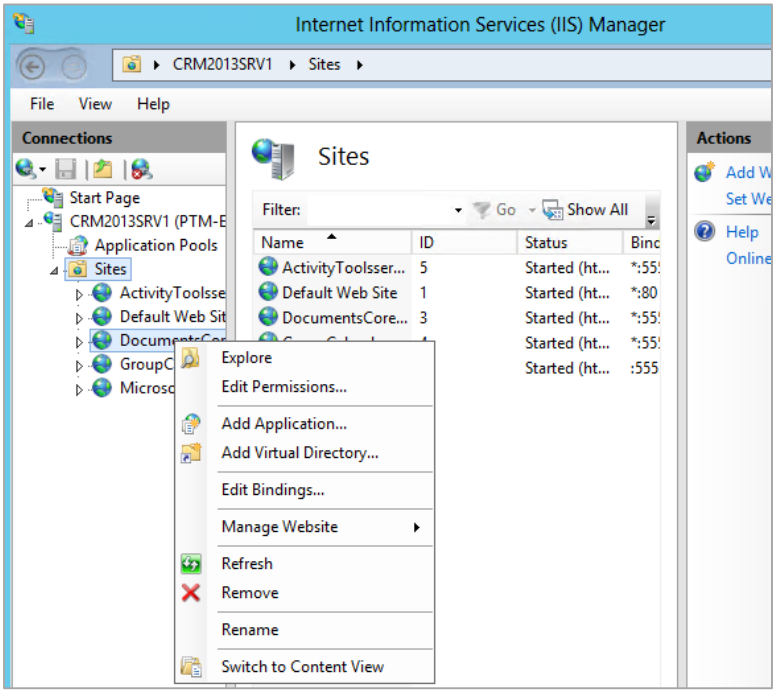
ATTENTION: There is no IFD Configuration required for DocumentsCorePack for MS CRM 2015 Installation

1. Install the addon on the CRM Server.

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

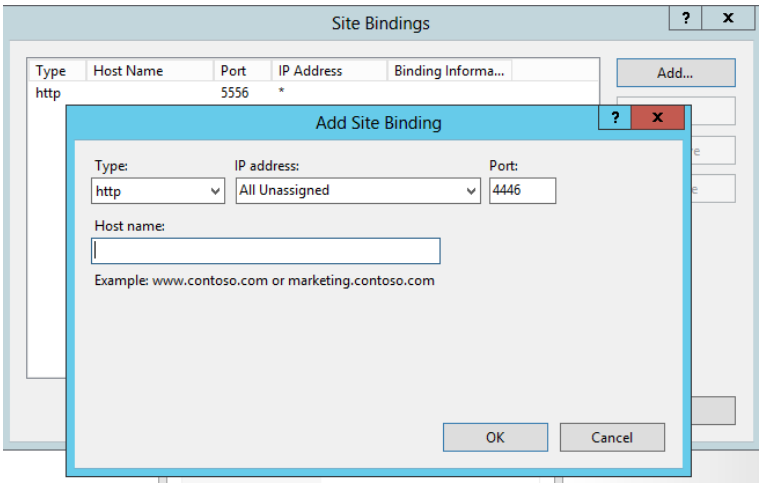


3. After the installation is finished you have to open the IIS (inetmgr.exe) and go to the Sites -> the Addon WebSite. Right click the DocumentsCorePackserver - WebSite and select "Edit Bindings...".



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

See next screenshot:



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

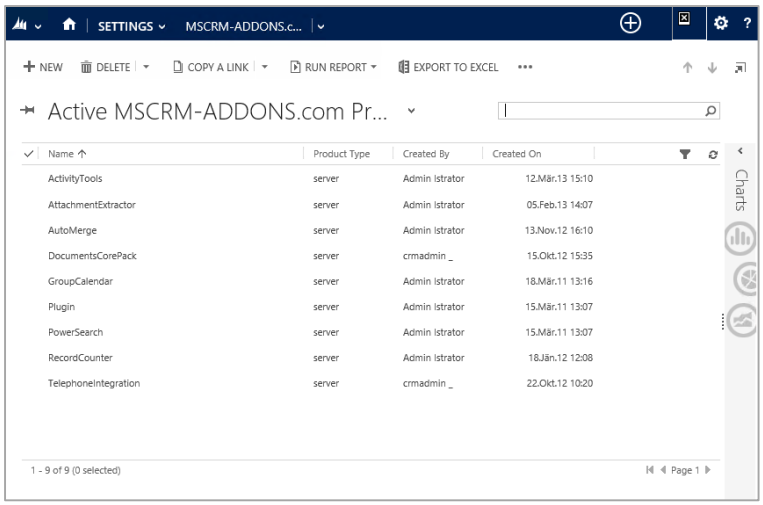
4. Reselect the addon website and double click on the "Authentication" item on the right side details pane. Verify that the options "Anonymous" and "ASP.Net Impersonation" settings are enabled.

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

6. Extract the IFD-Tool (zip-file) that you downloaded before and execute the

IFDSetupWizard.exe. Follow the steps in the IFD Setup carefully.

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



8. Open the WebApplicationPort and replace the existing KeyValue with the following: [httpsPort]|[httpPort]|[claimsbased]|[addonname]|[debugging],
e.g.: 4446|5557|true|activitytoolsserver|false

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

1. Please logon your AD FS Server and start AD FS 2.0 Management.

2. On the actions menu located in the right column, click "Add Relying Party Trust".

3. In the "Add Relying Party Trust"-wizard, click "Start"

4. On the "Select Data Source" page, click "Import data about the relying part published online or on a local network" and then type in the URL to locate the "federationmetadata.xml" file.

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

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

5. Click "Next".

6. On the "Specify Display Name" page, type in a display name such as DocumentsCorePack IFD, and click on "Next".

7. On the "Choose Issuance Authorization Rules" page, leave the "Permit all users to access this relying party" option selected and then click "Next".

8. On the "Ready to Add Trust" page, click "Next", and then click "Close".

9. If the "Rules Editor" appears, click on "Add Rule". Otherwise, in the "Relying Party Trusts" list, right-click the relying party object that you created, click "Edit Claims Rules" and then click "Add Rule". **Important**: Be sure that the "Issuance Transform Rules" tab is selected.

10. In the "Claim rule template" list, select the "Pass Through or Filter an Incoming Claim" template, and then click "Next".

11. Create the following rule:

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

    i. Incoming claim type: UPN
    ii. Pass through all claim values

12. Click "Finish".

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

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

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

14. Click Finish.

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

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

17. Create the following rule:

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

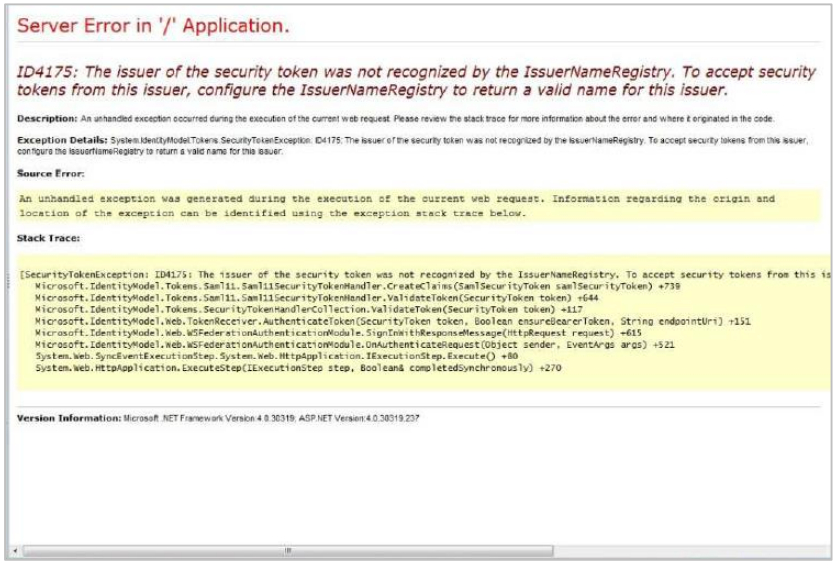
i. Incoming claim type: Windows account name
ii. Outgoing claim type: Name
iii. Pass through all claim values

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

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

9 Troubleshooting

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



Reason 1:
This indicates you are using a wrong certificate for the ADFS signing. Make sure the thumbprint in the web.config matches the one the token signing certificate in ADFS.

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

Reason 2:
This error could also indicate access rights problems with the certificates private key (Mainly an issue for self-signed certificates).

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

Checklist for general troubleshooting:

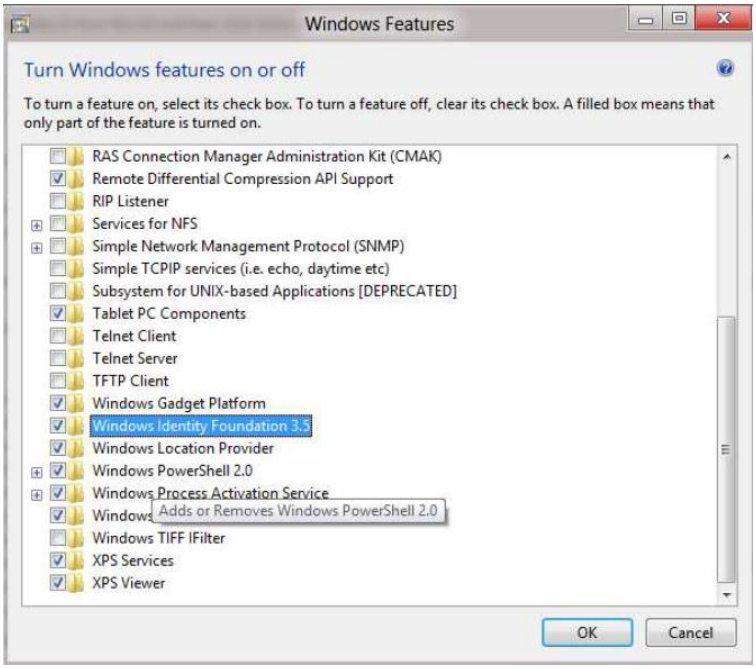
- Is the Setting WebApplicationPort still intact
- Are there any not http/https bindings in CRM
- Are there any not http/https bindings in the products website
- Is the DNS correctly resolving the products link
- Has the ConnectionProfile been created with IFD as connection type

10 Windows 8 WIF Framework installation (WindowsIdentityFoundation)

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

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

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



11 DocumentsCorePack Templates

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

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

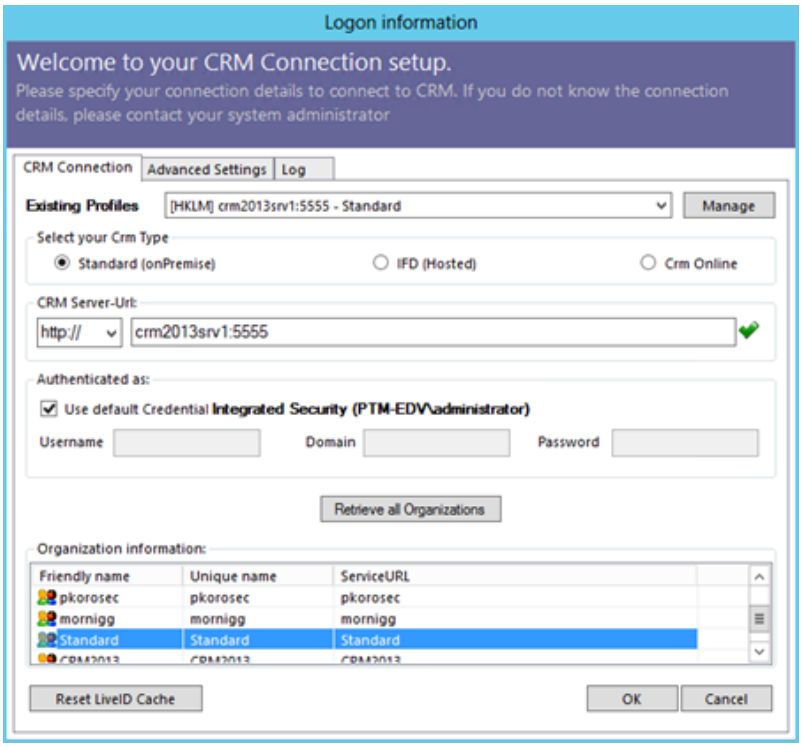
NOTE: Some basic templates like "Account Reconnect", "Gift Certificate" for contacts and "quote" – templates come with the installation of DocumentsCorePack.

11.1 How to create DocumentsCorePack Templates

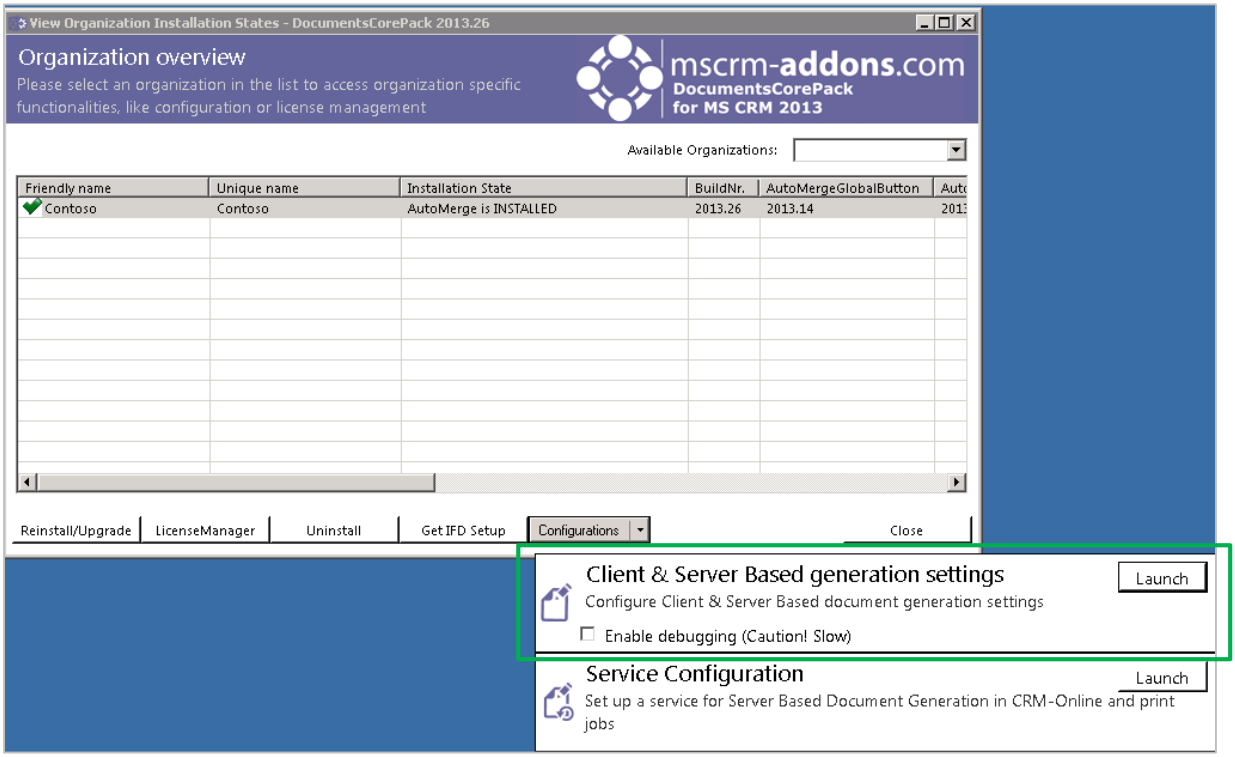
Read the "User Guide" to get more information about the creation of DocumentsCorePack templates.

11.2 Import existing DocumentsCorePack Templates

Open your DocumentsCorePack Server Configuration and choose the organisation for which you want to import/export the Templates. See screenshots below:

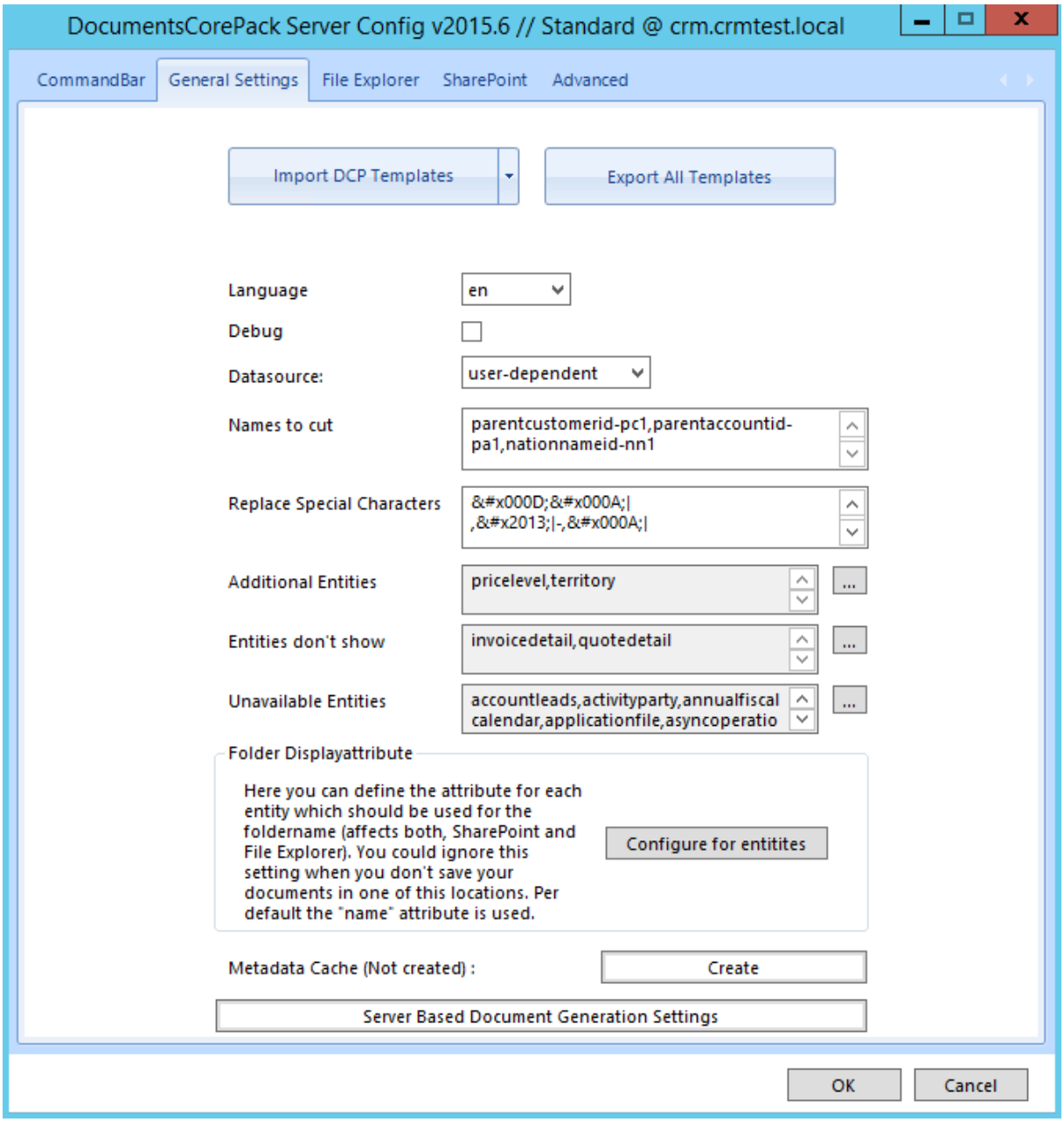


The screenshot above shows the CRM Connection setup where user credentials can be set. Choose your organization and click on [OK]. This action will open following window:

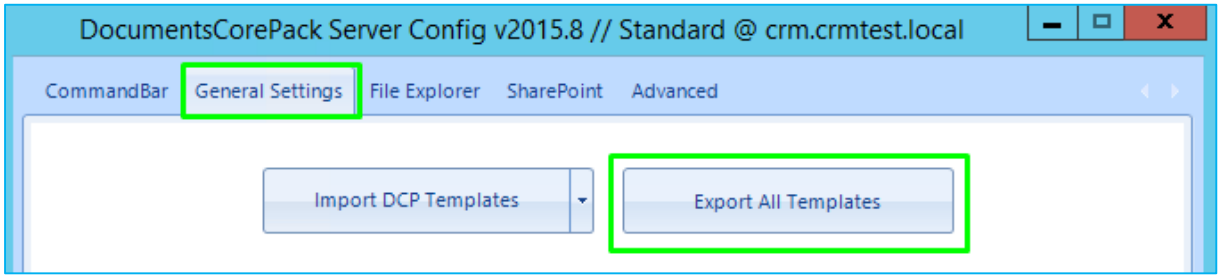


The screenshot above shows the organization overview. Select an organization to access to the configurations. Click on the dropdown button next to Configurations and choose DocumentsCorePack

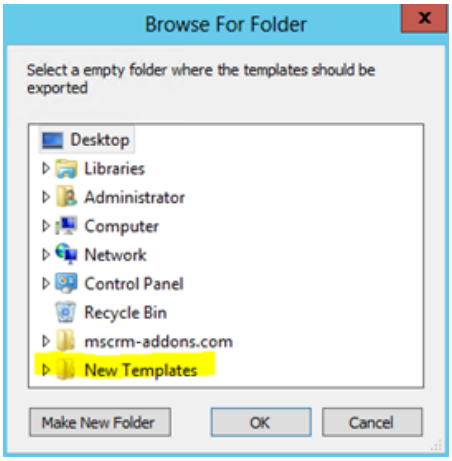
Client. See screenshot above. This action will open the DocumentsCorePack Client Configuration, there click on the General Settings tab. See next screenshot:



First click on [Export All Templates] to export all Templates from your CRM-test system on your local computer. See next screenshot highlighted in green:



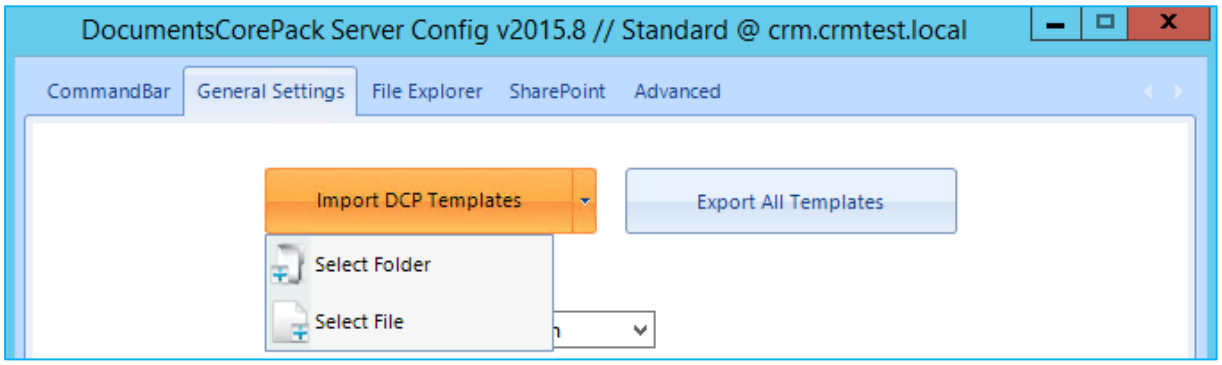
Chose an existing folder or create a new one where all Templates will be exported out of CRM. See next screenshot highlighted in yellow

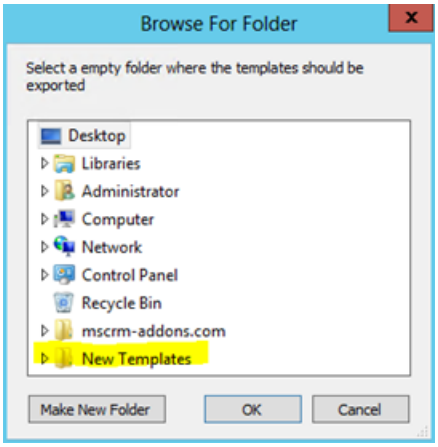


This is necessary in order to import the templates.

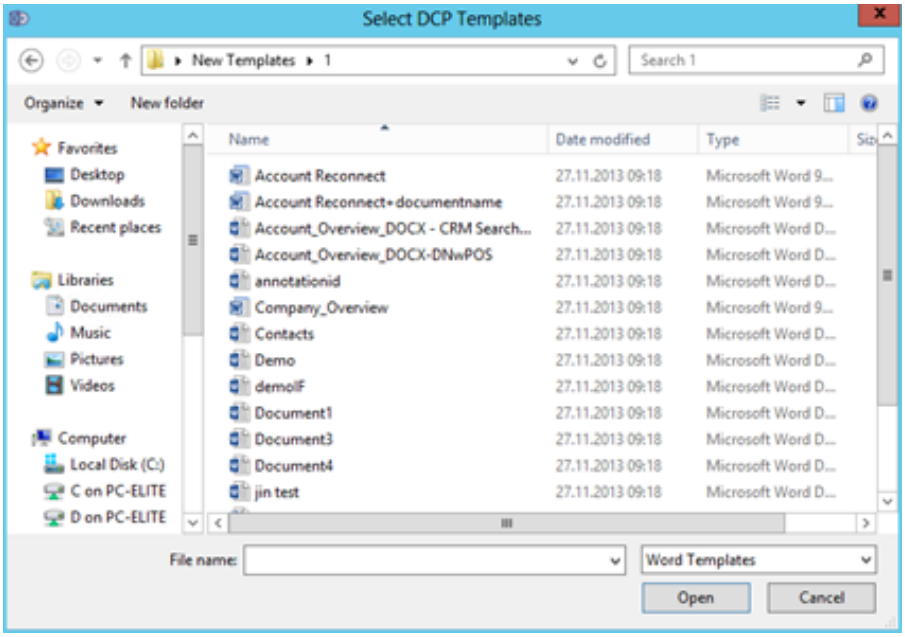
11.2.1 Import a Folder / Import a File

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



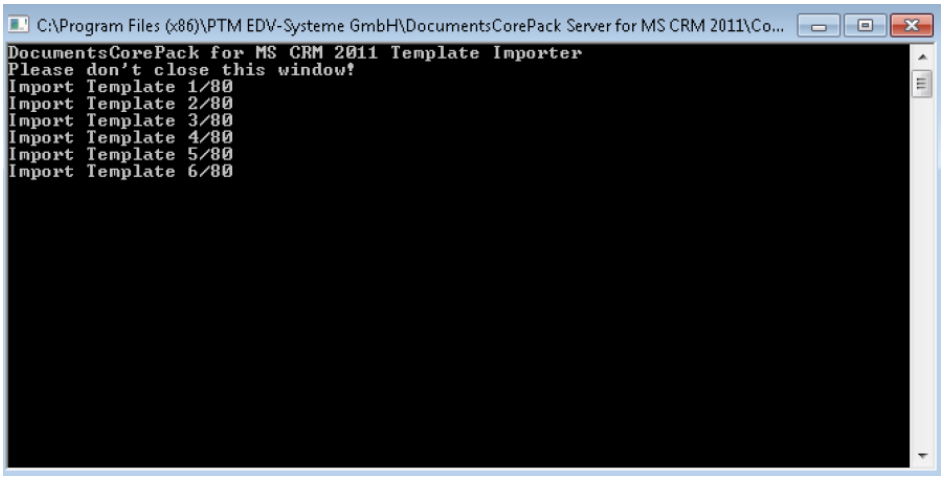


Next screenshot shows the Template folder:



11.2.2 Processing Import

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



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

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

12 Language Settings for DocumentsCorePack

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

12.1 Language Settings on the Client

12.1.1 Location of the Language Settings on the Client

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

Example:
The Language file for the English UI is: **en.xml**
<Language setting> is the language code that DocumentsCorePack should use on the client. Each client can have its own language settings and files.

NOTE: Please note that these languages files can only be used if the set language is the same as the user language of your CRM system.

12.1.2 Modify the UI language on the Client

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

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

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

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

12.1.3 How to translate a language file

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

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

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

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

12.2 Language Settings on the Server

12.2.1 Location of the Language Settings on the Server

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

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

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

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

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

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

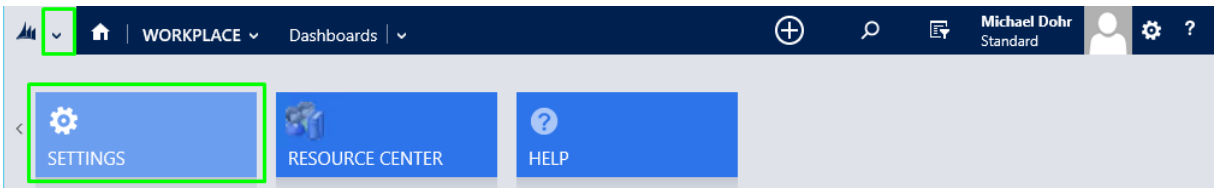
12.2.2 How to translate a language file

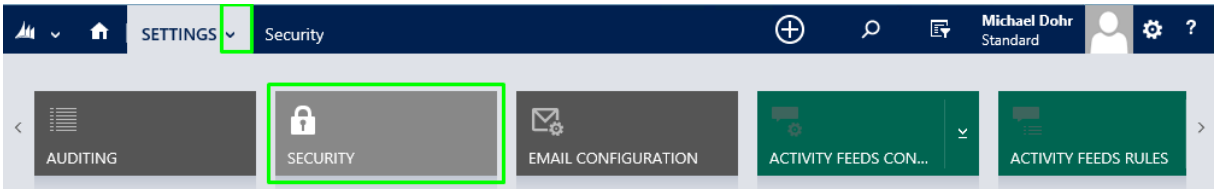
Have a look at chapter 13

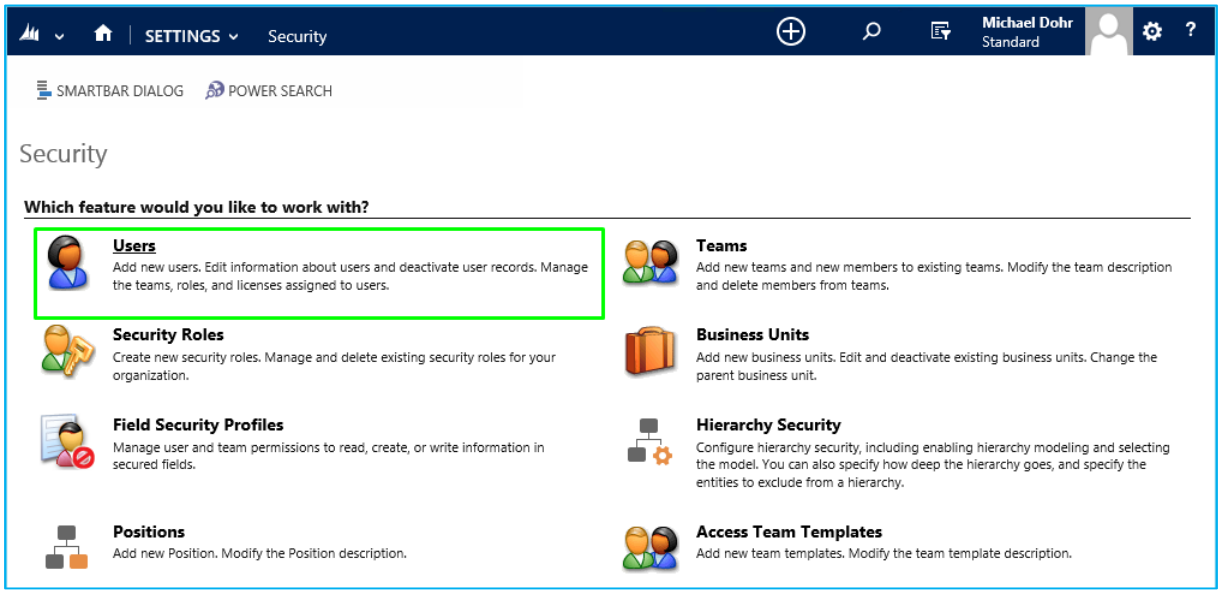
13 Per User Licensing –option

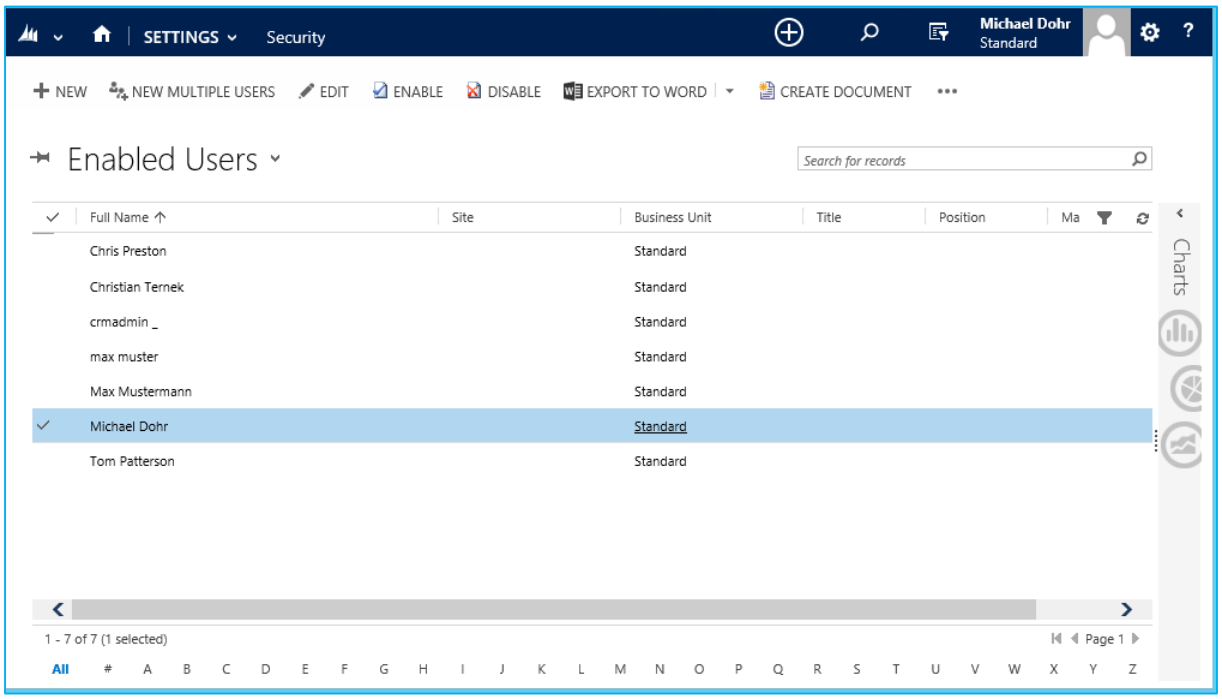
In CRM 2015 go to Settings/Security/Users and pick a user with a double-click (see next screenshots). You will see "Per User Licensing for DocumentsCorePack for MS CRM 2015" where you are able to activate or disable a user's license.

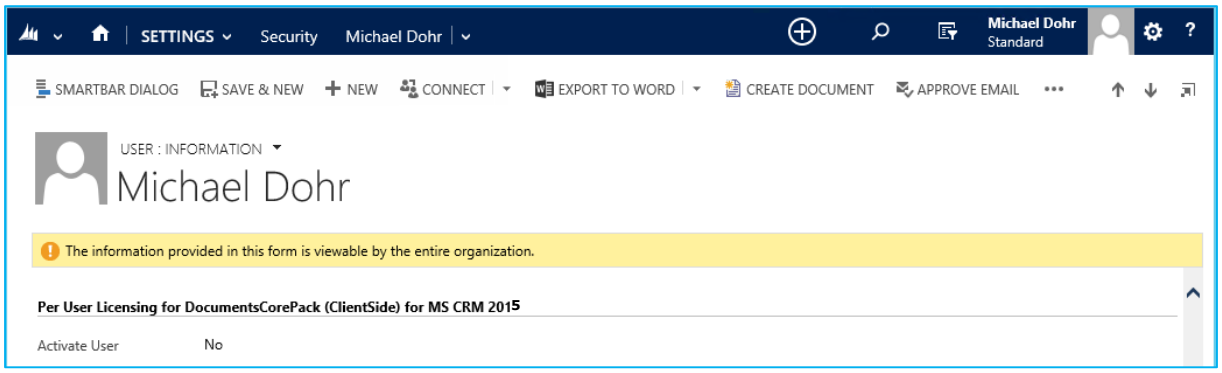
If you activate more users as you have licenses, the product will stop working for all users. See screenshots below:



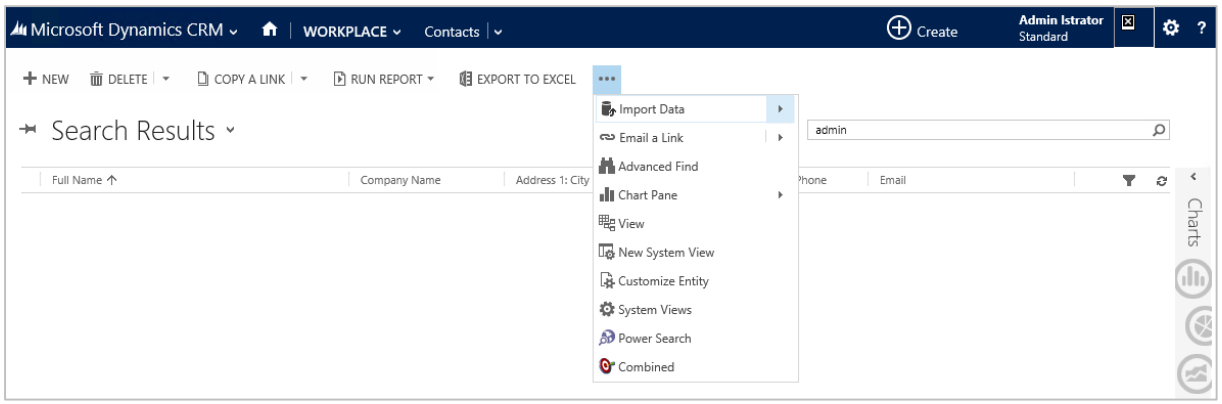








By setting this option to "no", the license will be disabled for this user and the "Create Document" -button will be disabled as shown in the following screenshot.



13.1 Important Information

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

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

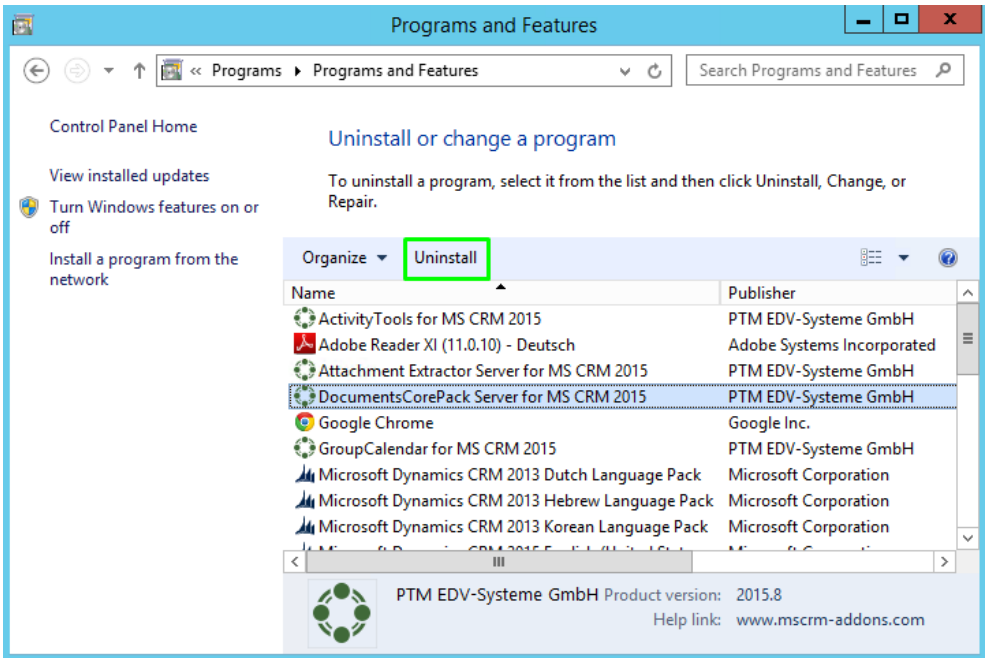
Now you change the setting to shorten parentaccountid to pc1. NEW Templates will be filled correctly! (Insert Mail Merge Fields inserts the correct short name into your template.)

All OLD templates which use merge fields and which include parentaccountid will not work anymore! So you have to edit them! (maybe by using the Replace…-function of Word) Sometimes it will be the better way to replace full merge fields. So instead of changing just a part of a merge field let DCP replace the whole one.

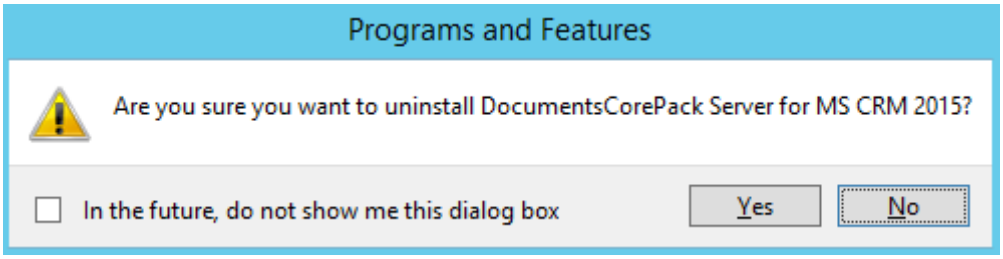
For example:
From "customerid_contact_parentcustomerid_address1_fax" to
"cust_cont_par_adr1_fax"; Old templates won't be affected, but you have to add every field to the settings.

14 Uninstall DocumentsCorePack Server Component

To uninstall DocumentsCorePack Server for MS CRM 2015 select "Programs and Features" in the Control Panel. Search for the DocumentsCorePack Server CRM 2015 in "Uninstall or change a program" and click on "Uninstall"



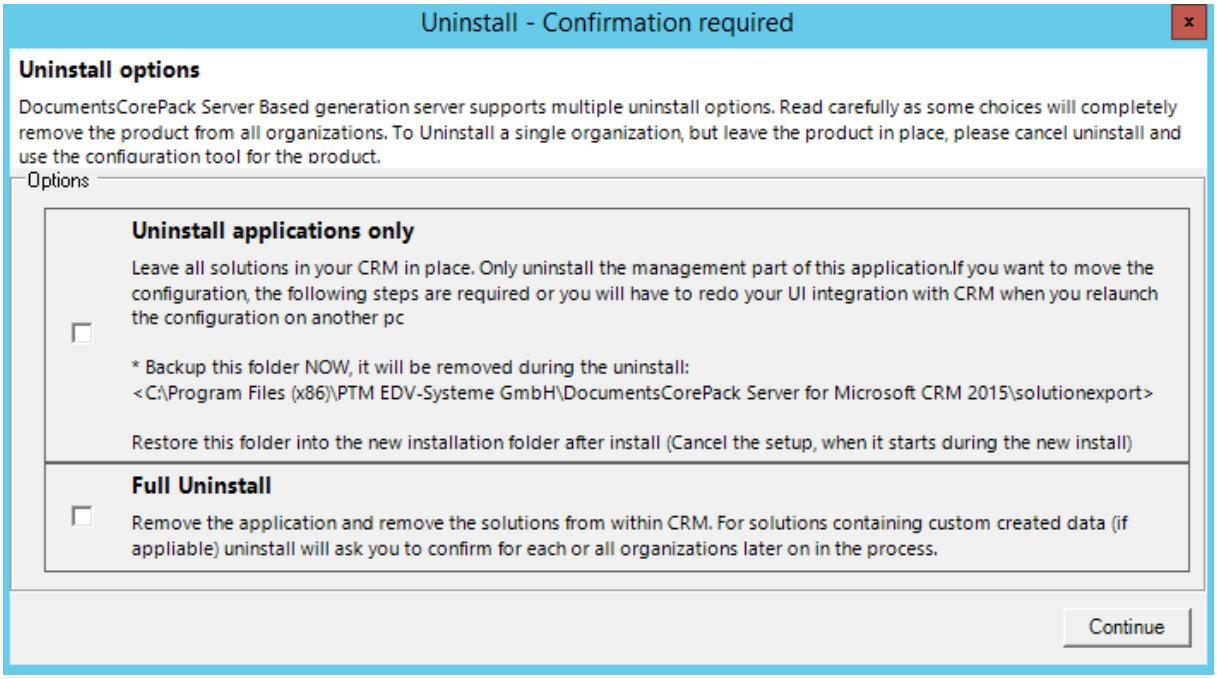
Following window appears:



Click on [Yes] to fully uninstall DocumentsCorePack Server for MS CRM 2015.

Click on [No] if you don't want to uninstall DocumentsCorePack Server for MS CRM 2015.

If you click on [Yes] following window appears:



Choose between “Uninstall applications only” or “Fully Uninstall” and click on [Continue].
It may take a few minutes to uninstall DocumentsCorePack Server.

15 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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