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DocumentsCorePack Client Installation Guide for Microsoft 2015/2016 and Dynamics 365

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Client Installation Guide

(How to install and configure DocumentsCorePack Client for MS CRM 2015/2016 and Dynamics 365)

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CONTENT

1	How to install DocumentsCorePack Client?	4
2	Installation DocumentsCorePack Client	5
2.1	Install the component on the client	5
2.2	End User License Agreement (EULA)	6
2.3	Confirm the installation	6
2.4	Configure Dynamics 365 Server	8
2.5	Organization overview	9
2.5.1	Reinstall/Upgrade	9
2.5.2	LICENSEMANAGER	9
2.5.3	UNINSTALL	10
2.5.4	Get IFD Setup	10
2.5.5	CONFIGURATIONS	11
2.6	The “www.mscrm-addons.com” -tab	12
3	Installation on a Terminal Server / Windows Server	13
4	Installation on a Terminal Server from Dynamics 365 Online	17
5	Unattended Setup DocumentsCorePack Client for Dynamics 365	21
6	Uninstall DocumentsCorePack Client Component	22
7	List of figures	23
8	Contact	24

Preamble

This documentation is intended to guide you through the installation of DocumentsCorePack Client 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 SQL Server databases
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM Server

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

- Installing DocumentsCorePack Client for Microsoft Dynamics 365
- Configuring DocumentsCorePack Client for Microsoft Dynamics 365

Prerequisites

Microsoft .NET Framework 4.5 RTM is required

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

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

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

Supported Word Versions

- Word 2010 32/64bit
- Word 2013 32/64bit
- Word 2016 32/64bit

1 How to install DocumentsCorePack Client?

You can install the DocumentsCorePack Client on every supported operating system which is able to connect to your Dynamics 365 server. During the installation, you have to specify at least one organization in which the DocumentsCorePack Client will be installed.

Additional organizations can be setup from the installation manager after the original setup has finished.

Prerequisites

Before you start the installation, you have to download the DocumentsCorePack Application. You can download files [here](#).

Install directly on a Dynamics 365 On-Premise Server

You could install the DCP Server directly on a Dynamics 365 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 Dynamics 365 server.

Install for Dynamics 365 Online

When you want to use Dynamics 365 Online, you could install DCP on every supported operating system. You have to specify a valid Dynamics 365 Online profile. In that case, you have limited functionality of the DocumentsCorePack Server. You could not use the following features:

- SharePoint Folder and Site integration
- File Explorer integration

2 Installation DocumentsCorePack Client

This chapter explains how to install the client component.



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.

2.1 Install the component on the client

Run the “DocumentsCorePack Client for MS Dynamics 365.exe” setup file. You will see the following window:

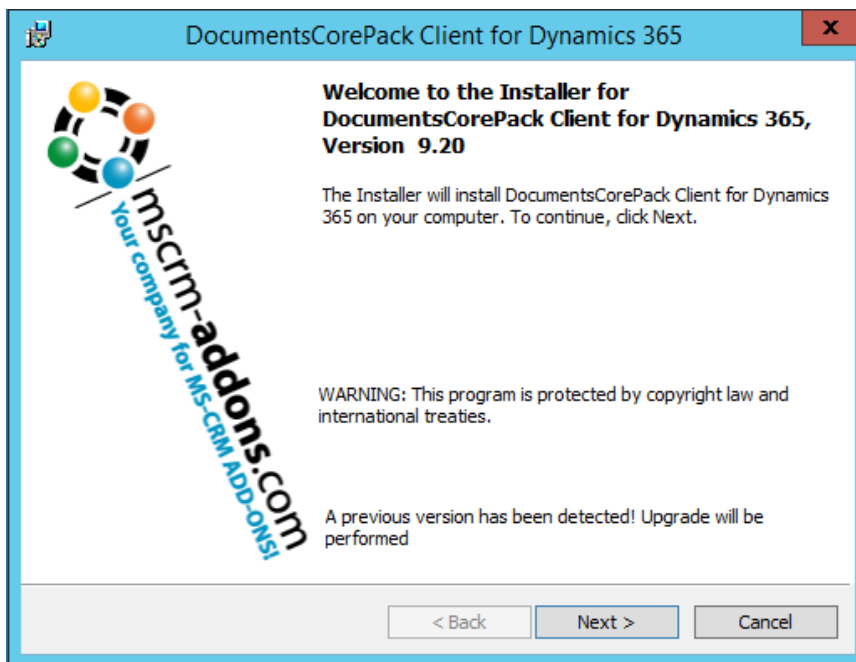


Figure 1: Installer DCP Client for Dynamics 365

Hit the **[Next >]**-button to continue with the license agreement.

2.2 End User License Agreement (EULA)

Please accept the license agreement by checking the first checkbox (highlighted in yellow) and click on the **[Next >]**-button.

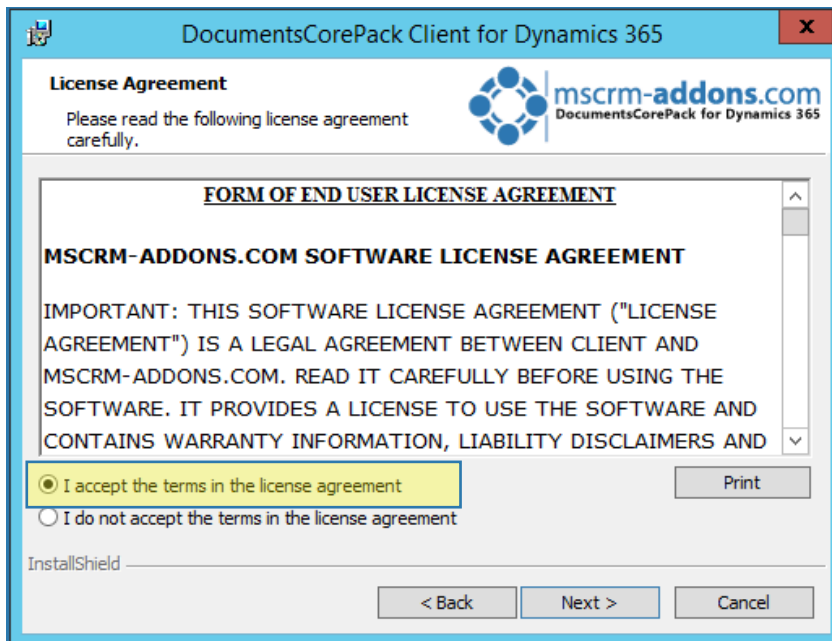


Figure 2: End User License Agreement (EULA)

2.3 Confirm the installation

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

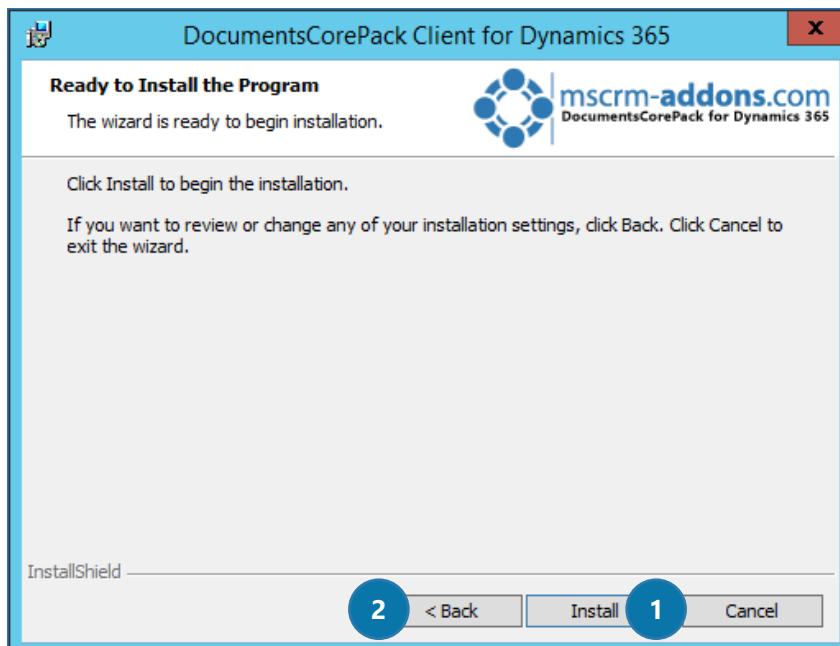


Figure 3: Confirm installation

If you want to change any of your installation settings, please hit the **2 [Back]**-button. If you go back, you can, for example, change the installation folder as you can see in the figure below.

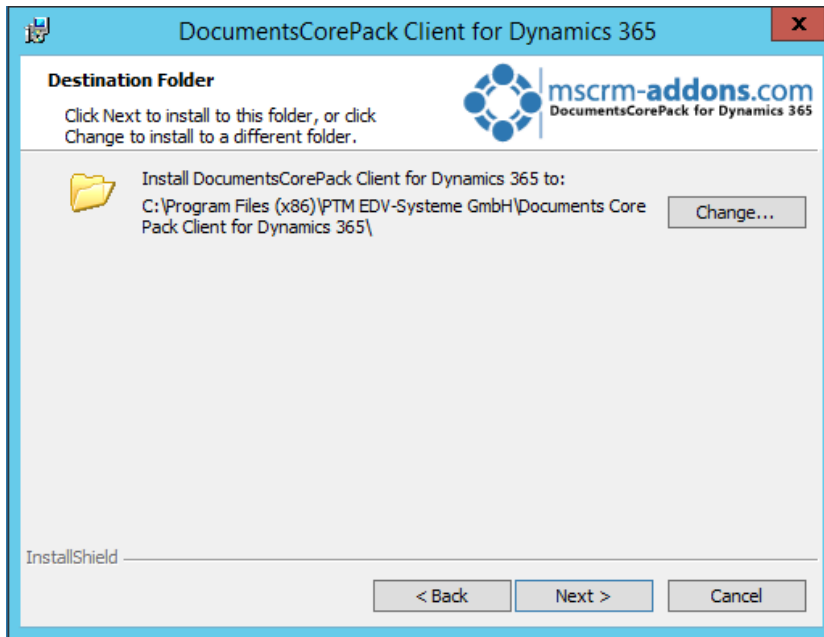


Figure 4: Change installation folder

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

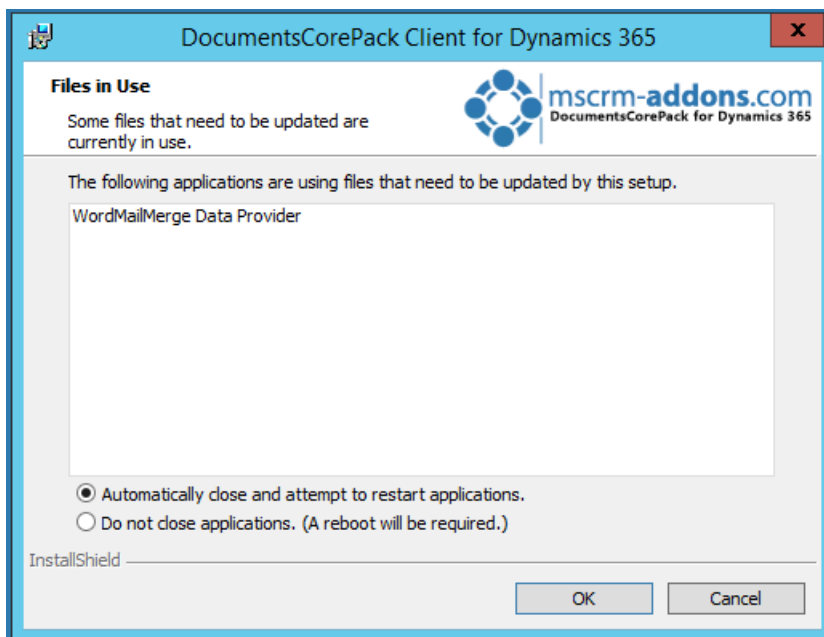


Figure 5: Files in Use-window

Hit the **[OK]**-button to continue.

Please wait while DocumentsCorePack Client will be installed. This may take several minutes. After it is successfully installed, please click on the **[Finish]**-button to exit the wizard.

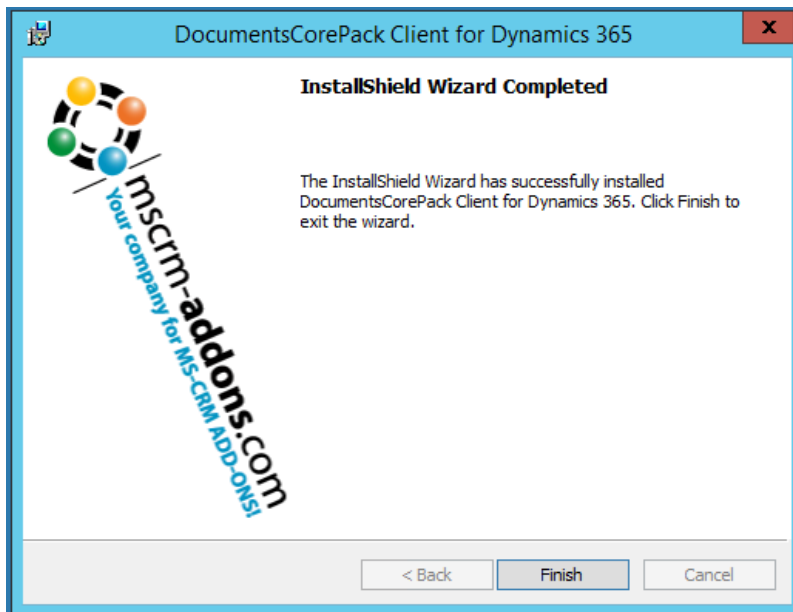
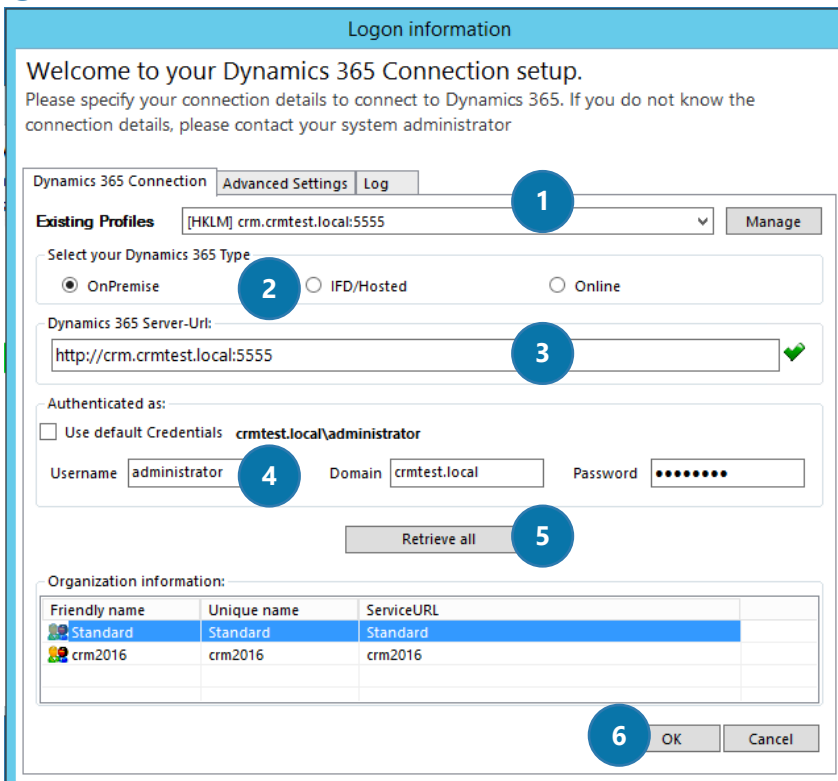


Figure 6: Finish the installation

2.4 Configure Dynamics 365 Server

Next, you have to configure your Dynamics 365 server. Therefore, select your **1** profile or create a new profile and select your **2** Dynamics 365 type. Choose the **3** server path and add your login credentials by filling in the field's **4** username, password and domain or choose the default credentials. Click on the **5 [Retrieve all]**-button and as soon as the organizations are retrieved, choose one and press the **6 [OK]**-button.



Logon information

Welcome to your Dynamics 365 Connection setup.
Please specify your connection details to connect to Dynamics 365. If you do not know the connection details, please contact your system administrator

Dynamics 365 Connection | Advanced Settings | Log

Existing Profiles: [HKLM] crm.crmtest.local:5555 (1) Manage

Select your Dynamics 365 Type (2):
☒ OnPremise ☐ IFD/Hosted ☐ Online

Dynamics 365 Server-Url: (3)
 http://crm.crmtest.local:5555 ✓

Authenticated as:
☐ Use default Credentials **crmtest.local\administrator**

Username (4): administrator Domain: crmtest.local Password:

Retrieve all (5)

Organization information:

Friendly name	Unique name	ServiceURL
Standard	Standard	Standard
crm2016	crm2016	crm2016

OK Cancel (6)

Figure 7: Dynamics 365 Connection setup

2.5 Organization overview

After finishing the configuration, the *Organization overview*-window opens. By choosing an organisation, the several function-buttons will be visible at the window-bottom.

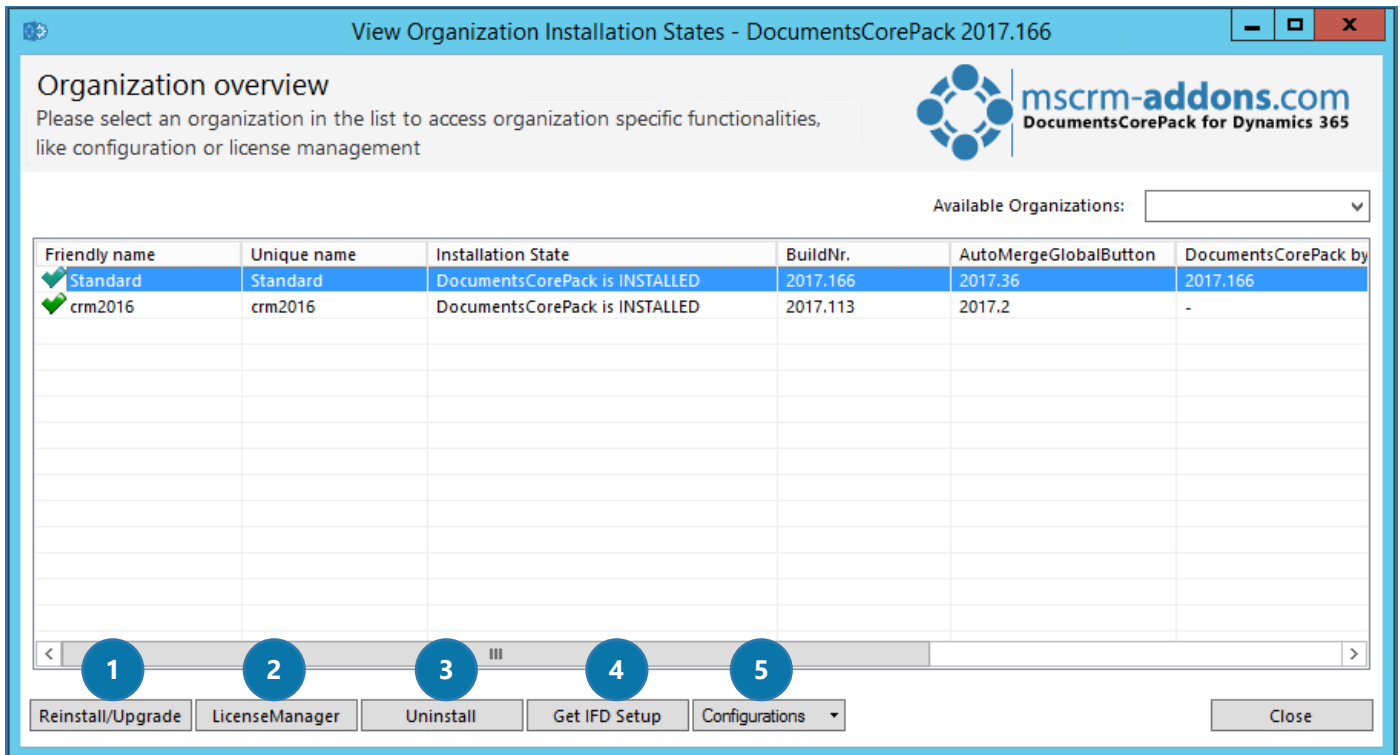


Figure 8: Organization overview

These buttons are described below and enable you to configure or modify your service:

2.5.1 Reinstall/Upgrade

With a click on the **[Reinstall/Upgrade]**-button, you can upgrade your solution to the latest version.

2.5.2 LICENSEMANAGER

A click on this button opens the local License Manager. The License Manager provides you with an overview of all the MSCRM-ADDONS products you have installed. Selecting a product in this overview will bring up the according to license details on the right side. A green check, next to an add-on icon, means that its license is valid. A cross symbolizes an invalid license. More information about the local License Manager can be found in the corresponding [documentation](#) (chapter 2.1 Local License Manager Overview).

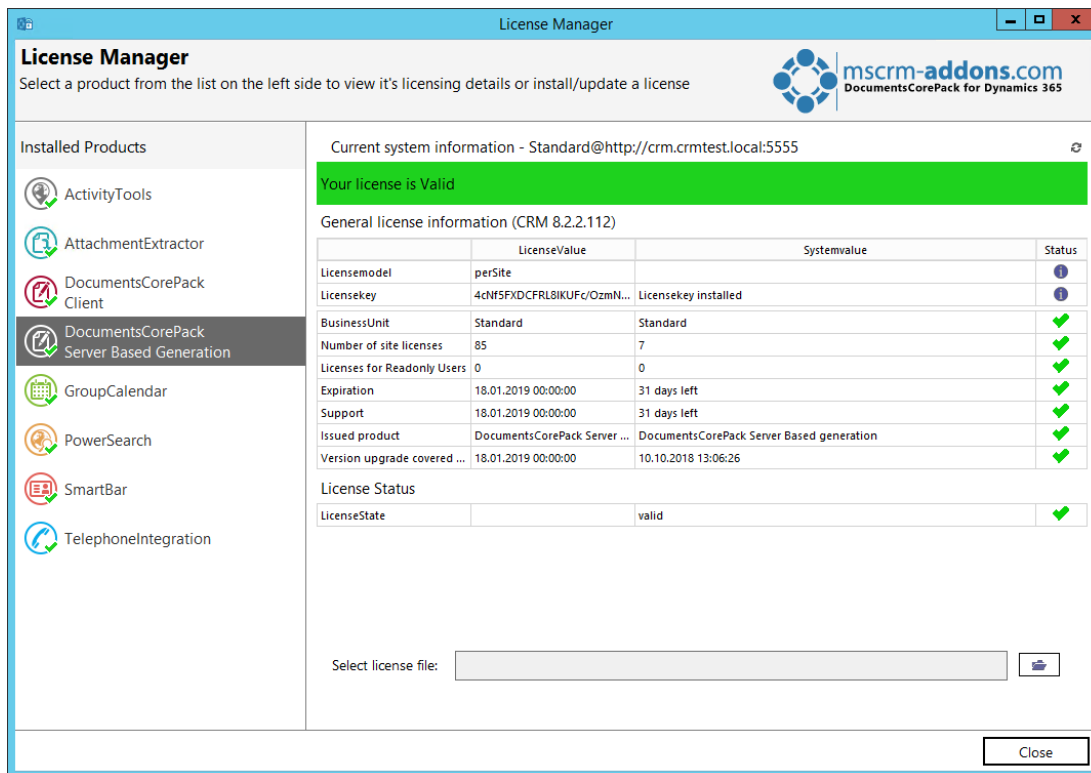


Figure 9: Local License Manager

2.5.3 UNINSTALL

With a click on this button, you have the possibility to uninstall DCP from the organization selected. Before it will be uninstalled, you will be provided with the *Uninstall*-window. Here, click on the **[Yes]**-button in order to uninstall the service or click on the **[No]**-button in order to cancel.

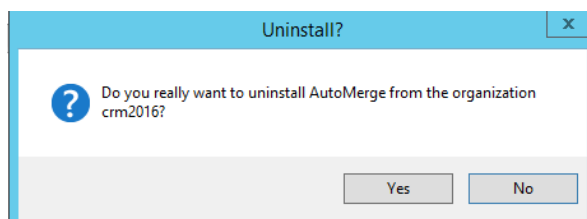


Figure 10: The Uninstall-window

2.5.4 Get IFD Setup

An IFD setup is only required when using FileExplorer or SharePoint Folder and Sites Integration. Therefore, you have to install IFD before you can use it – so please hit the **[Get IFD Setup]**-button.

2.5.5 CONFIGURATIONS

This button allows you to configure the ① Client & Server Based generation settings and to set up the ② Service Configuration in Dynamics 365-Online and print jobs.

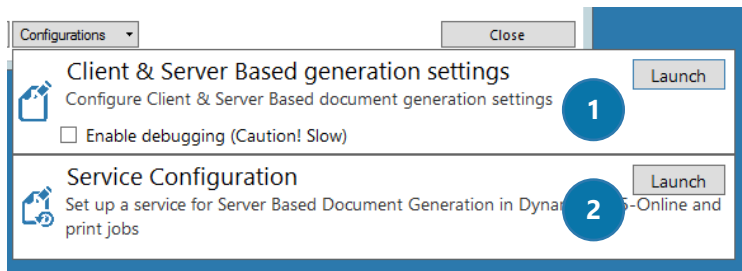


Figure 11: Configurations

Please find detailed information about the Configurations in the corresponding documentation [DocumentsCorePack Server Installation Guide](#) (chapter 2.3.5 Configurations).

2.6 The “www.mscrm-addons.com”-tab

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

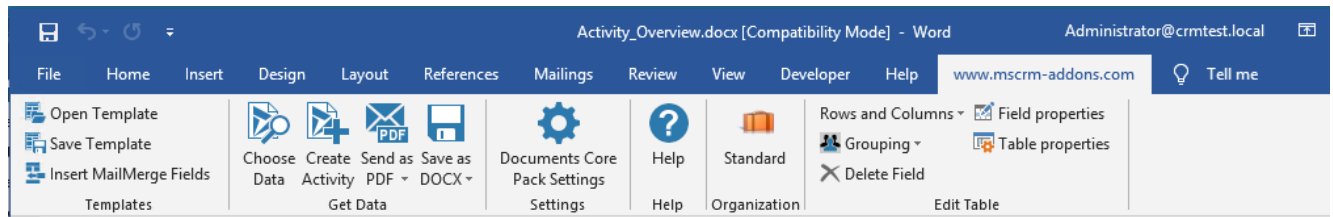


Figure 12: The www.mscrm-addons.com – tab

The *www.mscrm-addons.com* – tab contains several options, like create a template with the “Insert MailMerge Fields”-option, “Create Activity” or to send the document as a .pdf.

For more information, please read our [DocumentsCorePack Client User Guide](#) (chapter 1.7).

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 Add/Remove Programs-option. Click on the „Add new programs “-button. Now click on the „CD or floppy disc “-button to open the installation wizard and chose the DCP setup file. Finally, you have to click on [Finish] to start the installation.

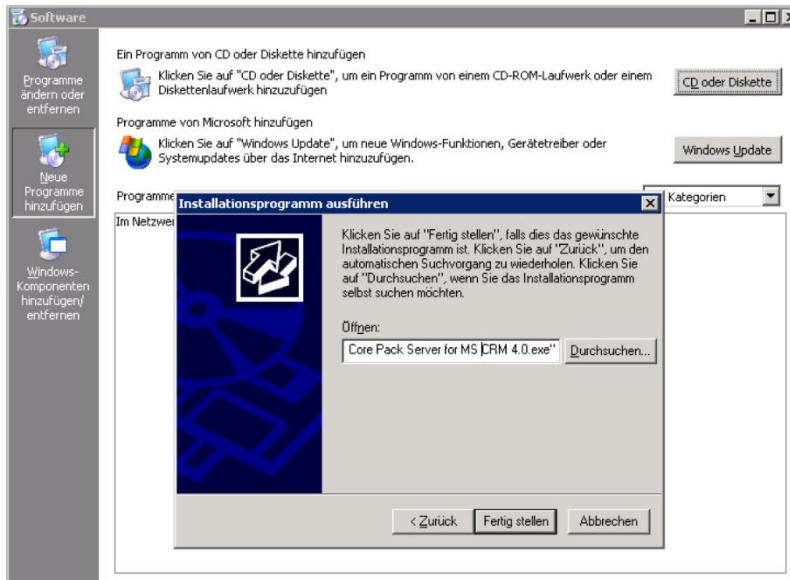


Figure 13: Installation on a terminal server

The following window opens.

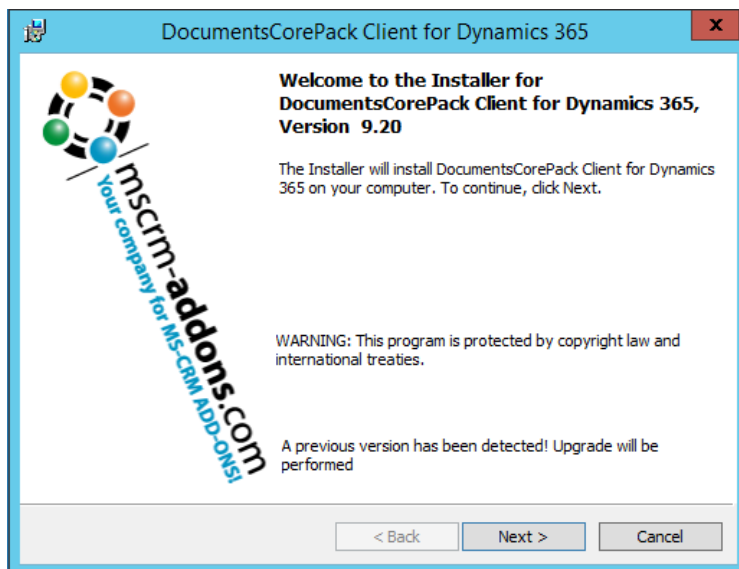


Figure 14: Installer DCP Client for Dynamics 365

Hit the **[Next >]**-button to continue with the license agreement.

Please accept the license agreement by checking the first checkbox (highlighted in yellow) and click on the **[Next >]**-button.

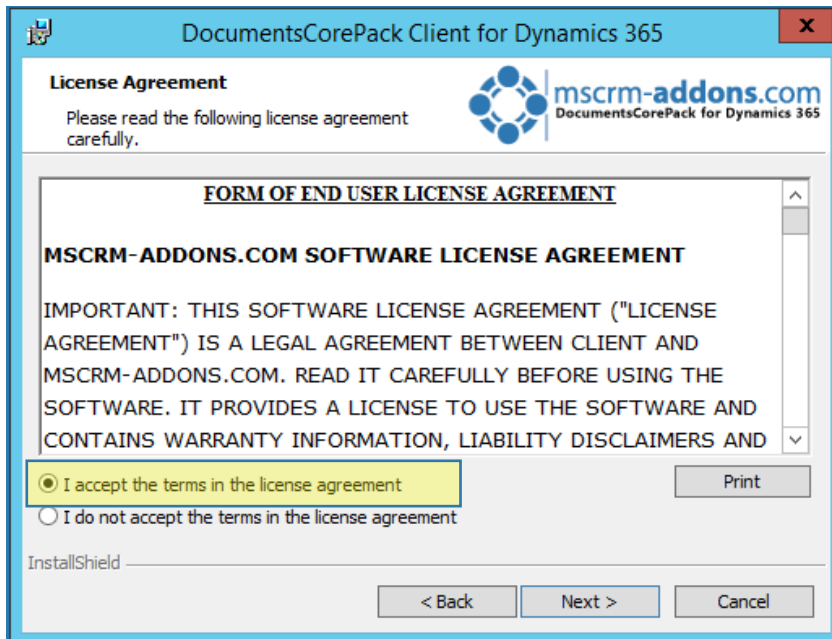


Figure 15: End User License Agreement (EULA)

Click on the **[Install]**-button to confirm the installation as you can see in the figure below.

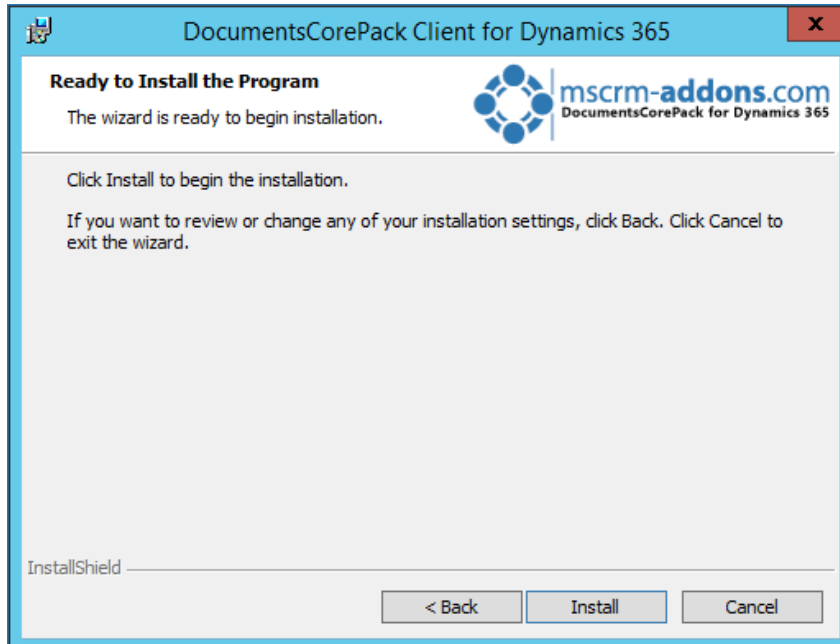
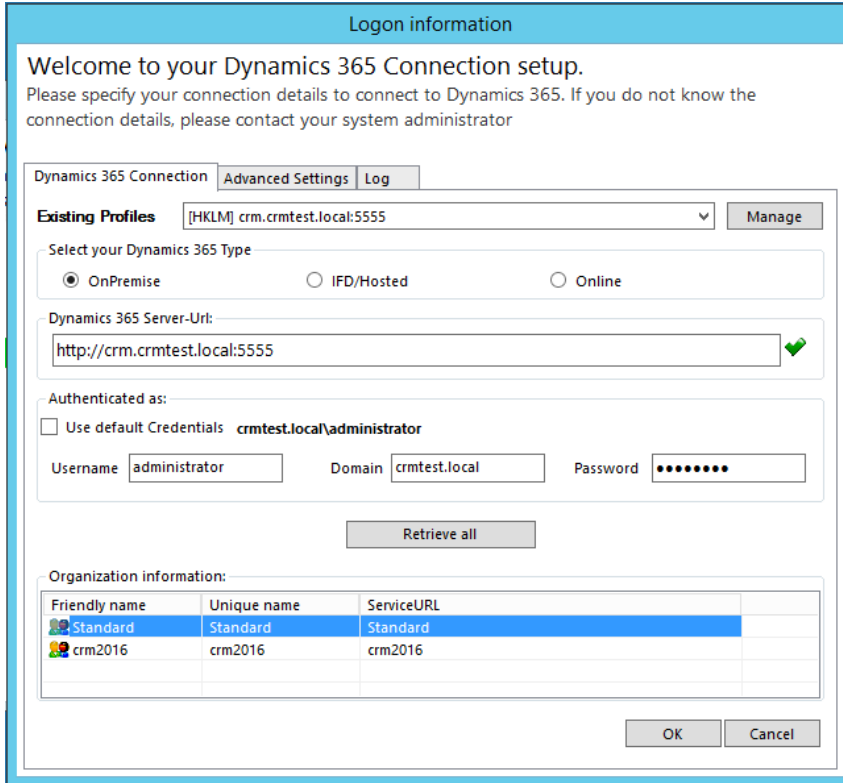


Figure 16: Installation wizard

In the connection-dialog, you have to enter the CRM server-name with the port (e.g.: servername : crm, port : 5555).

When installing on a terminal server, you have to change the "Login Credentials". Uncheck the "Use default Credentials" and enter a valid username, domain and password.



Logon information

Welcome to your Dynamics 365 Connection setup.
Please specify your connection details to connect to Dynamics 365. If you do not know the connection details, please contact your system administrator

Dynamics 365 Connection | Advanced Settings | Log

Existing Profiles [HKLM] crm.crmtest.local:5555 Manage

Select your Dynamics 365 Type

☒ OnPremise ☐ IFD/Hosted ☐ Online

Dynamics 365 Server-Url:
http://crm.crmtest.local:5555 ✓

Authenticated as:

☐ Use default Credentials crmtest.local\administrator

Username administrator Domain crmtest.local Password

Retrieve all

Organization information:

Friendly name	Unique name	ServiceURL
Standard	Standard	Standard
crm2016	crm2016	crm2016

OK Cancel

Figure 17: Dynamics 365 Connection setup

IMPORTANT: Finally, you have to change a registry entry to use integrated security.

Next, search in the Start Pane for „regedit“ and browse to “HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDVSysteme\” and choose the configured profile (you can see the profile used in the HKLM\SOFTWARE\PTM EDV Systeme\DocumentsCorePackclient2011\ActiveProfileSetting). The regarding entry is called „**CrmUserIntegratedSecurity**“. Change the value to „**true**“.

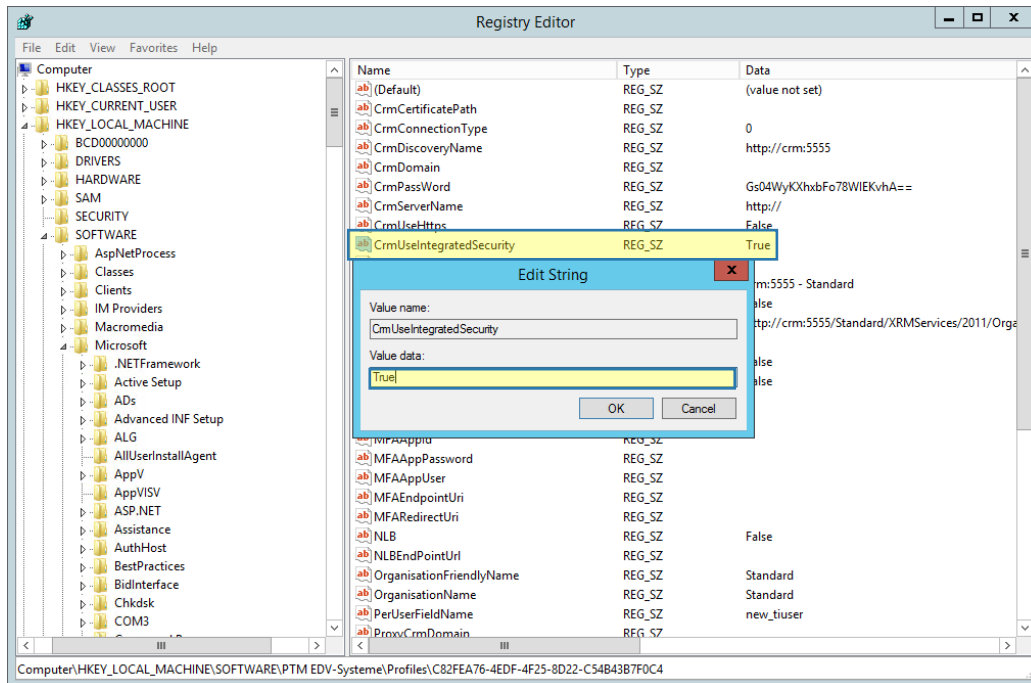
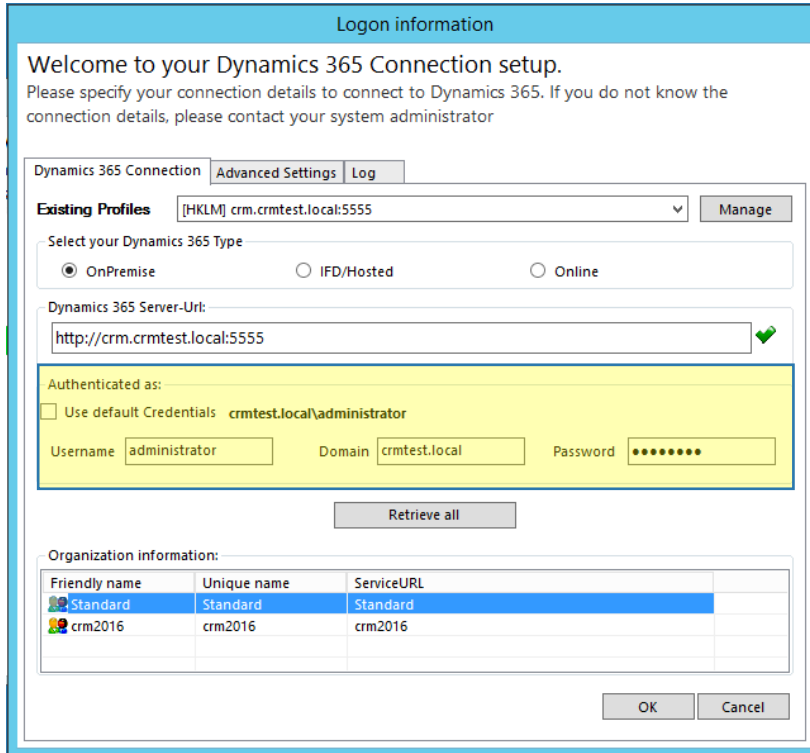


Figure 18: *CrmUserIntegratedSecurity* value

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 next screenshot).



Logon information

Welcome to your Dynamics 365 Connection setup.
Please specify your connection details to connect to Dynamics 365. If you do not know the connection details, please contact your system administrator

Dynamics 365 Connection | Advanced Settings | Log

Existing Profiles [HKLM] crm.crmtest.local:5555 Manage

Select your Dynamics 365 Type

☒ OnPremise ☐ IFD/Hosted ☐ Online

Dynamics 365 Server-Url:
http://crm.crmtest.local:5555 ✓

Authenticated as:

☐ Use default Credentials crmtest.local\administrator

Username administrator Domain crmtest.local Password

Retrieve all

Organization information:

Friendly name	Unique name	ServiceURL
Standard	Standard	Standard
crm2016	crm2016	crm2016

OK Cancel

Figure 19: Login Credentials

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) First of all, please run „regedit“ in the Start Pane.

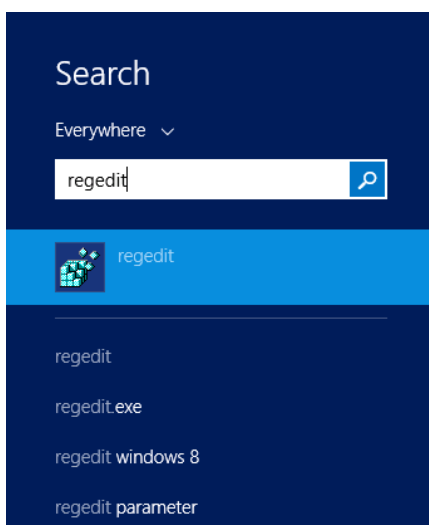


Figure 20: Start Pane – regedit

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").

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.

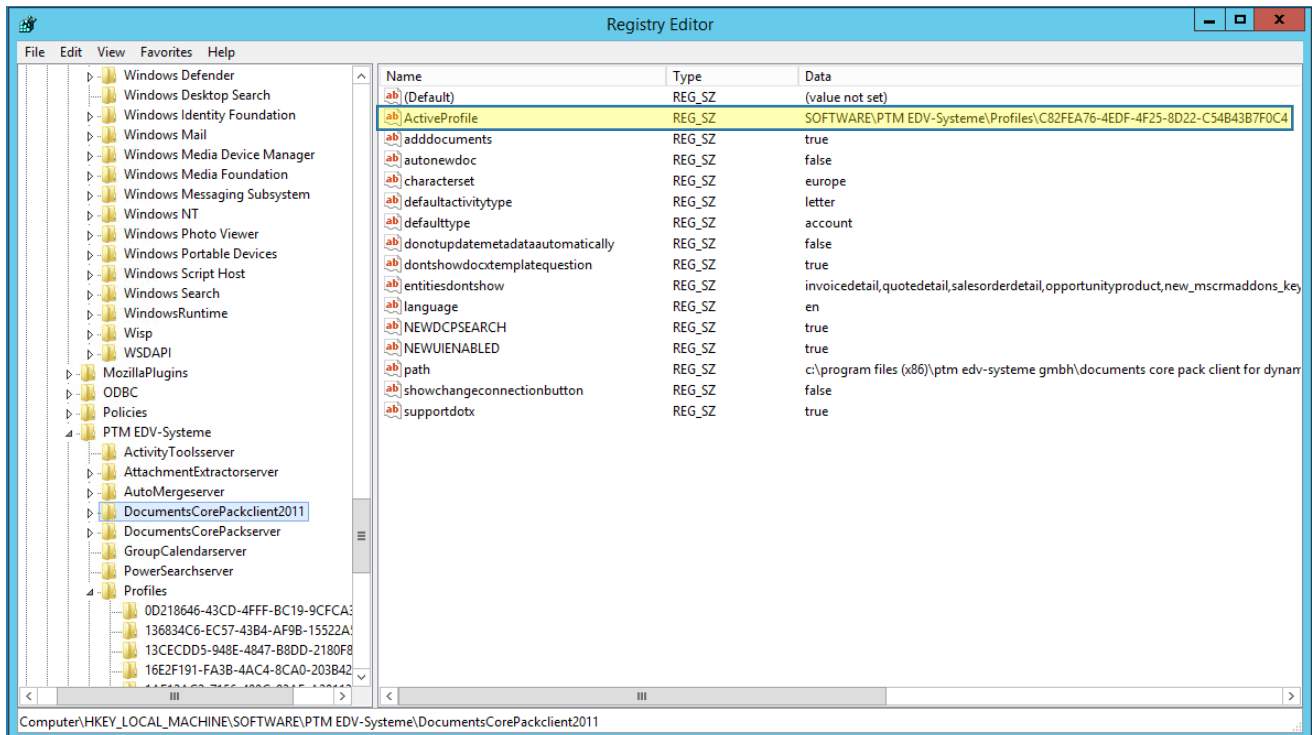


Figure 21: Active profile

2) Next, select the correct profile and search for the `CrmUserName` key.

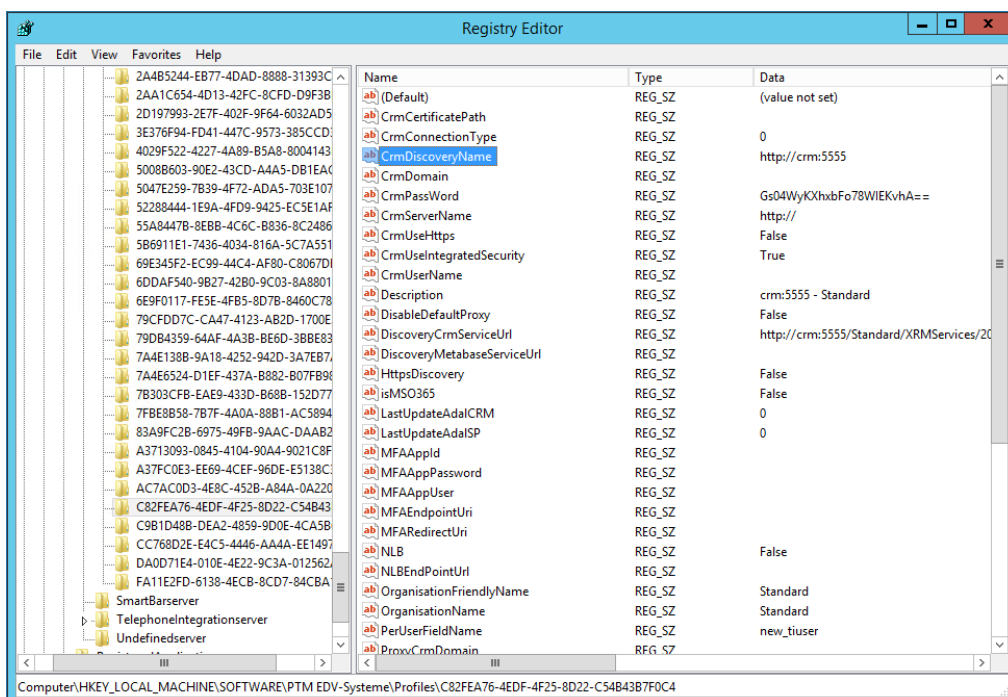


Figure 22: CrmUserName key

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

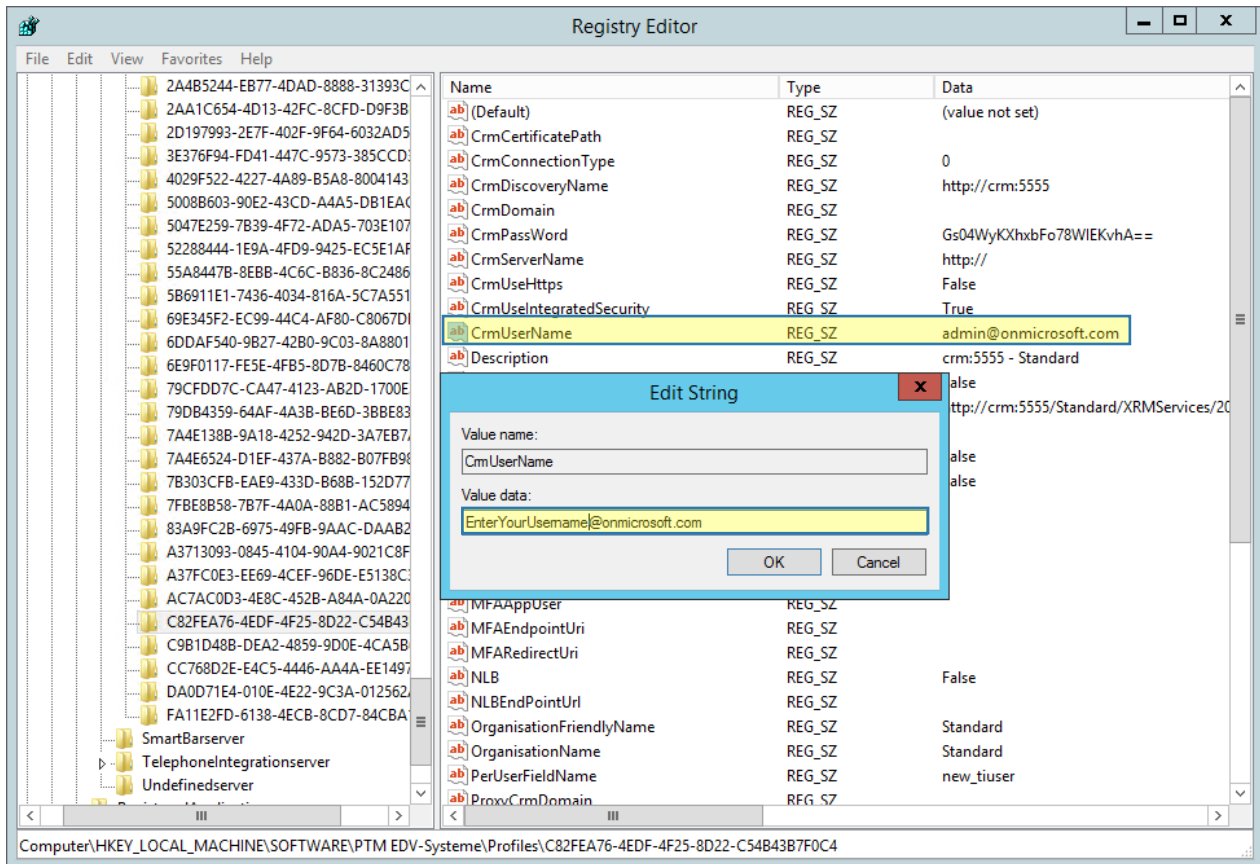


Figure 23: Enter CrmUserName

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

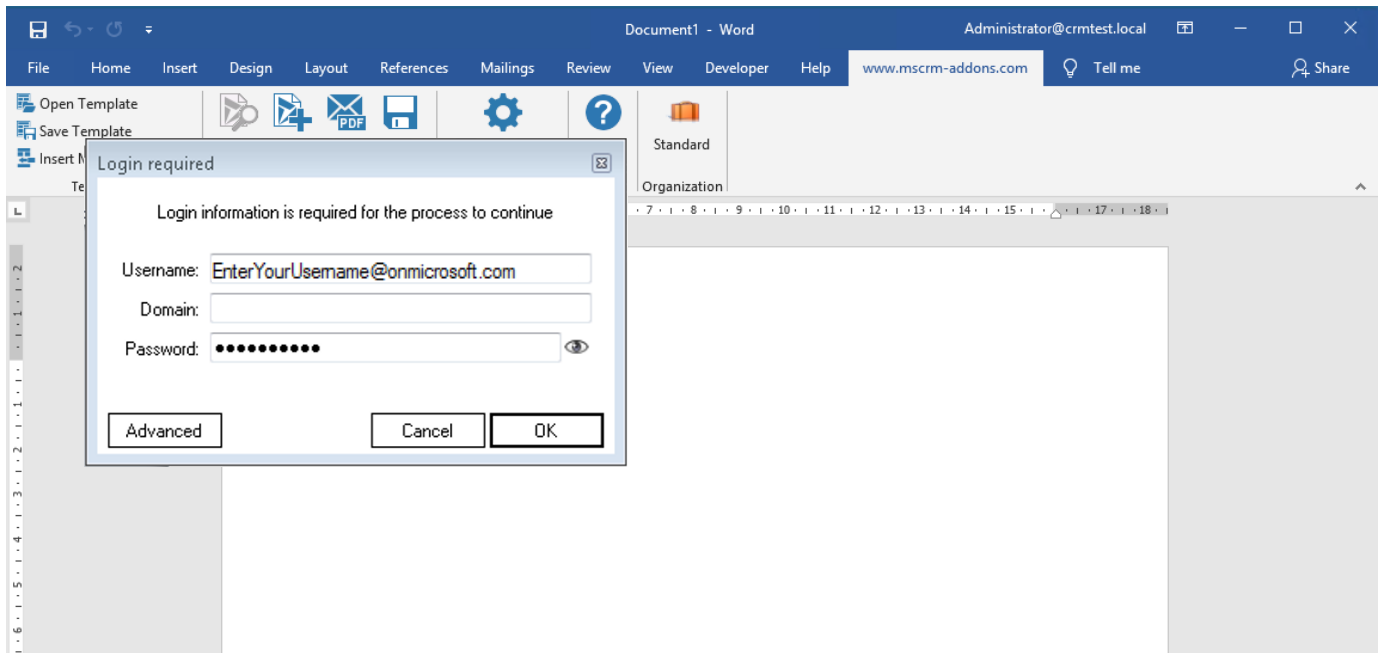


Figure 24: Log in on a terminal server using DCP for the first time

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

5 Unattended Setup DocumentsCorePack Client for Dynamics 365

To install the DocumentsCorePack Client 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 Client Version 5.18 and above.

ATTENTION! The Microsoft Windows Identity Foundation software MUST be present previous to the installation or the installation will fail.

Download the [uai-Template.reg \(1.18 kb\)](#)

This is a blank registry file containing all required keys. You need to replace the following tags with your actual Dynamics 365 data:

[YOURCRMSEVER:PORT] : The URL of the Dynamics 365 server without any protocol information, e.g. crm:5555.

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

OrganisationFriendlyName contains the organization name and also influences the name of the RibbonToolbar in Microsoft Word. While not vital, it should be changed to reflect the correct organisation name.

If your discoveryservice is using https (usually, it is the same protocol as your Dynamics 365), the entry HttpsDiscovery needs to be set to "true".

You can then launch the setup with the prepared registry file - similar to the batch file [launch.bat \(116.00 bytes\)](#)

```
"[DocumentsCorePackInstallFolderAndFile]" /V"/qb /lvx* C:\instlog.txt  
UAIREGFILE=[RegFileLocation]\uai-template.reg"
```

The tags [DocumentsCorePackInstallFolderAndFile] need to point to the correct installation source folder and filename.

[RegFileLocation] needs to point to the folder of the prepared registryfile. If you changed the registry filename, you need to adapt this change in the command as well.

6 Uninstall DocumentsCorePack Client Component

In order to uninstall DocumentsCorePack Client for 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" (highlighted in yellow).

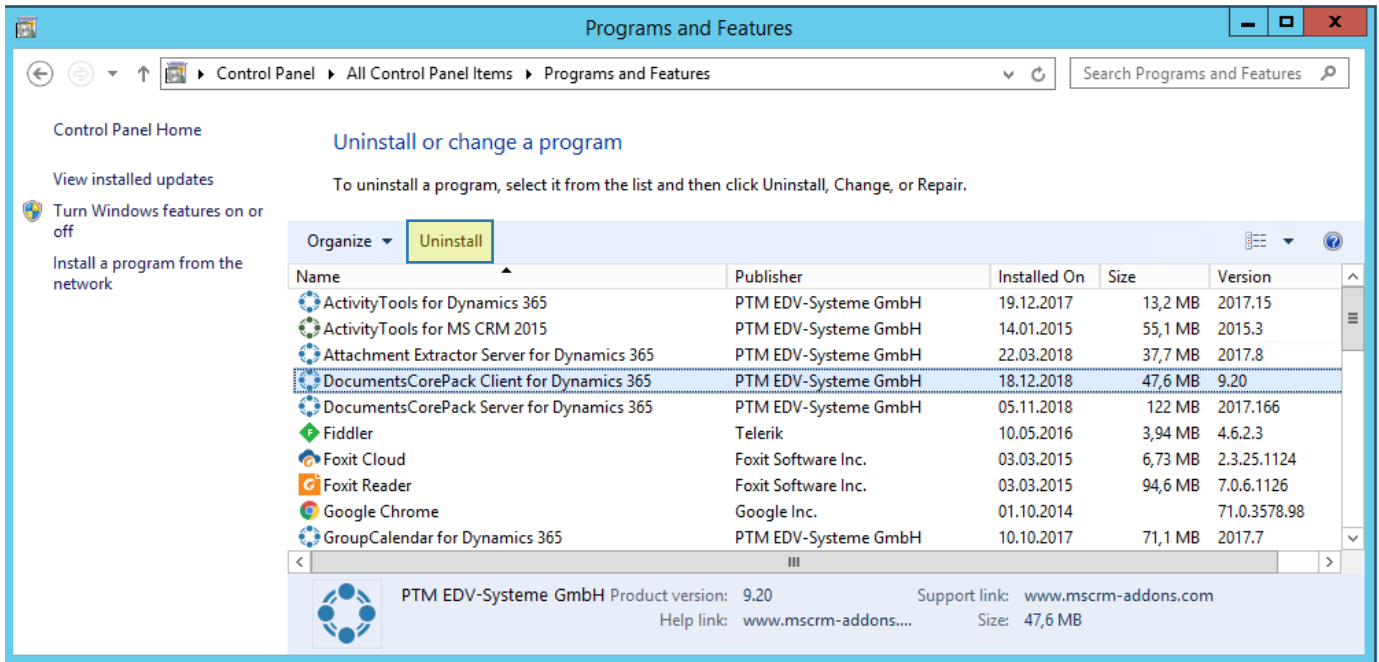


Figure 25: Uninstall DCP Client for Dynamics 365

Following window appears:

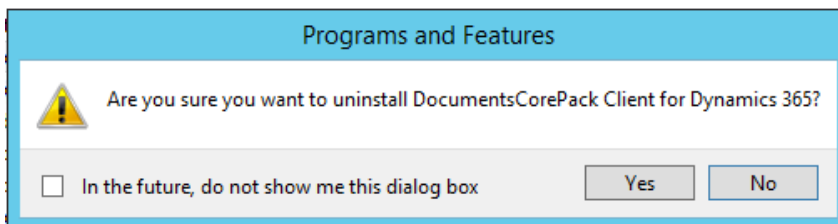


Figure 26: Uninstall-window DCP Client for Dynamics 365

Click on **[Yes]** to confirm Uninstall.

Click on **[No]** to stop the process.

7 List of figures

Figure 1: Installer DCP Client for Dynamics 365	
Figure 2: End User License Agreement (EULA)	
Figure 3: Confirm installation.....	
Figure 4: Change installation folder.....	
Figure 5: Files in Use-window	
Figure 6: Finish the installation.....	
Figure 7: Dynamics 365 Connection setup	
Figure 8: Organization overview	
Figure 9: Local License Manager.....	
Figure 10: The Uninstall-window	
Figure 11: Configurations.....	
Figure 12: The www.mscrm-addons.com – tab.....	
Figure 13: Installation on a terminal server	
Figure 14: Installer DCP Client for Dynamics 365	
Figure 15: End User License Agreement (EULA).....	
Figure 16: Installation wizard	
Figure 17: Dynamics 365 Connection setup.....	
Figure 18: CrmUserIntegratedSecurity value	
Figure 19: Login Credentials.....	
Figure 20: Start Pane – regedit.....	
Figure 21: Active profile.....	
Figure 22: CrmUserName key	
Figure 23: Enter CrmUserName.....	
Figure 24: Log in on a terminal server using DCP for the first time	
Figure 25: Uninstall DCP Client for Dynamics 365	
Figure 26: Uninstall-window DCP Client for Dynamics 365	

8 Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact support@mscrm-addons.com.

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