

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

v.1.1, January 2019

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

The content of this document is subject to change without notice. "Microsoft" and "Microsoft Dynamics 365" are registered trademarks of Microsoft Inc. All other products- and company names mentioned are trademarks of their respectful owners.



CONTENT

1	How	to install DocumentsCorePack Client?	.4
2	Insta	Illation 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	Insta	Ilation on a Terminal Server / Windows Server	13
4	Insta	Ilation on a Terminal Server from Dynamics 365 Online	17
5	Unat	tended Setup DocumentsCorePack Client for Dynamics 365	21
6	Unin	stall DocumentsCorePack Client Component	22
7	List o	of figures	23
8	Cont	act	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 <u>here</u>.

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.

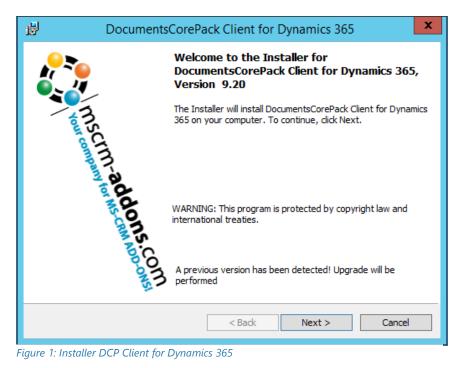


- Important before installing the components:
- Close all Office products (MS Word, MS Outlook...)
- Be sure that the machine is online to the Dynamics 365 server

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:



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.

DocumentsCorePack Client for Dynamics 365
License Agreement Please read the following license agreement carefully.
FORM OF END USER LICENSE AGREEMENT
MSCRM-ADDONS.COM SOFTWARE LICENSE AGREEMENT
IMPORTANT: THIS SOFTWARE LICENSE AGREEMENT ("LICENSE AGREEMENT") IS A LEGAL AGREEMENT BETWEEN CLIENT AND MSCRM-ADDONS.COM. READ IT CAREFULLY BEFORE USING THE SOFTWARE. IT PROVIDES A LICENSE TO USE THE SOFTWARE AND CONTAINS WARRANTY INFORMATION, LIABILITY DISCLAIMERS AND
I accept the terms in the license agreement Print I do not accept the terms in the license agreement
InstallShield

Figure 2: End User License Agreement (EULA)

2.3 Confirm the installation

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

DocumentsCorePack Client for Dynamics 365	x
Ready to Install the Program The wizard is ready to begin installation.	n 65
Click Install to begin the installation. If you want to review or change any of your installation settings, dick Back. Click Cancel to exit the wizard.	
InstallShield 2 < Back Install 1 Cancel]

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.



DocumentsCorePack Client for Dynamics 365	×
Destination Folder Click Next to install to this folder, or click Change to install to a different folder.	n 65
Install DocumentsCorePack Client for Dynamics 365 to: C:\Program Files (x86)\PTM EDV-Systeme GmbH\Documents Core Pack Client for Dynamics 365\ Change]
InstallShield]

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:

DocumentsCorePack Client for Dynamics 365
Files in Use Some files that need to be updated are currently in use.
The following applications are using files that need to be updated by this setup.
WordMailMerge Data Provider
Automatically close and attempt to restart applications.
O Do not close applications. (A reboot will be required.)
InstallShieldOK Cancel

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.

岁 Document	sCorePack Client for Dynamics 365									
InstallShield Wizard Completed										
The InstallShield Wizard has successfully installed DocumentsCorePack Client for Dynamics 365. Click Finish to exit the wizard.										
addons.cc										
ONES	Sack Finish Cancel									
Firme C. Finish the installation										

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 Connec	tion Advanced Setting	gs Log						
Existing Profiles	[HKLM] crm.crmtest.loc	cal:5555 V Manage						
Select your Dynami	cs 365 Type							
OnPremise	2 01	IFD/Hosted O Online						
Dynamics 365 Serve	r-Url:							
http://crm.crmte	st.local:5555	3						
Authenticated as: – Use default Cred Username admini	entials crmtest.local\a strator 4	administrator Domain crmtest.local Password						
		Retrieve all 5						
Organization information:								
Friendly name Unique name ServiceURL								
Standard Standard Standard Standard crm2016 crm2016								
2 crm2016 crm2016 crm2016								
6 ОК Сапсе!								

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.

())	Viev	v Organization Installation States -	DocumentsCore	Pack 2017.166	_ 🗆 X
		to access organization specific functic ent	onalities,	mscrm-a DocumentsCoreP	ddons.com ack for Dynamics 365
				Available Organizations:	*
Friendly name	Unique name	Installation State	BuildNr.	AutoMergeGlobalButton	DocumentsCorePack by
Standard 🔨	Standard	DocumentsCorePack is INSTALLED	2017.166	2017.36	2017.166
✓ crm2016	crm2016	DocumentsCorePack is INSTALLED	2017.113	2017.2	-
< 1 Reinstall/Upgrade	2 LicenseManager	3 III Uninstall Get IFD Setup Config	5 urations •		Close

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 <u>documentation</u> (chapter 2.1 Local License Manager Overview).



a		License Manager					
License Manager ielect a product from the list on the	left side to view it's licensing o	details or install/update	a license DocumentsCorePa	dons.com ck for Dynamics 365			
nstalled Products	Current system inform	mation - Standard@http	://crm.crmtest.local:5555	¢.			
ActivityTools	Your license is Valid						
	General license inform	nation (CRM 8.2.2.112)					
AttachmentExtractor		LicenseValue	Systemvalue	Status			
DocumentsCorePack	Licensemodel	perSite		0			
	Licensekey	4cNf5FXDCFRL8IKUFc/OzmN	Licensekey installed	1			
	BusinessUnit	Standard	Standard	*			
OcumentsCorePack Server Based Generation	Number of site licenses	85	7	¥			
	Licenses for Readonly Users	0	0	*			
GroupCalendar	Expiration	18.01.2019 00:00:00	31 days left	*			
	Support	18.01.2019 00:00:00	31 days left	×			
RowerSearch	Issued product	DocumentsCorePack Server	DocumentsCorePack Server Based generation	*			
	Version upgrade covered	18.01.2019 00:00:00	10.10.2018 13:06:26	*			
💷 SmartBar	License Status						
	LicenseState		valid	*			
C TelephoneIntegration							
	Select license file:						
				Close			

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.

Uninstall?	x
Do you really want to uninstall AutoMerge from the organization crm2016?	I
Yes No	

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.

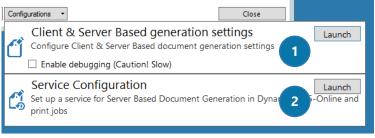


Figure 11: Configurations

Please find detailed information about the Configurations in the corresponding documentation <u>DocumentsCorePack Server Installation Guide</u> (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.

☐ S - O = Activity_Overview.docx [Compatibility Mode] - Word Administrator@crmte								tor@crmtest.local	Ŧ	
File Home Inse	t Design Layout	References	Mailings	Review	View De	veloper	Help	www.mscrm-addons.com	💡 Tell me	
 Open Template Save Template Insert MailMerge Fields 	Choose Create Send a Data Activity PDF	is Save as De	ocuments Core Pack Settings	? Help	, 📫 Standard	🚣 Gro		s • 📝 Field properties 🙀 Table properties		
Templates	Get Data		Settings	Help	Organization	n	Ed	dit Table		

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 <u>DocumentsCorePack Client User Guide</u> (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.

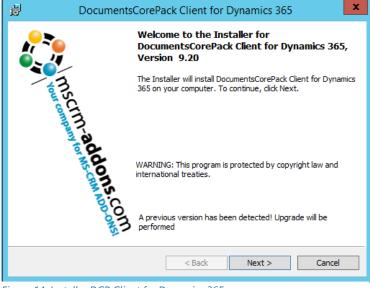


Figure 14: Installer DCP Client for Dynamics 365

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.

DocumentsCorePack Client for Dynamics 365	x
License Agreement Please read the following license agreement carefully.	5 5 365
FORM OF END USER LICENSE AGREEMENT	~
MSCRM-ADDONS.COM SOFTWARE LICENSE AGREEMENT	
IMPORTANT: THIS SOFTWARE LICENSE AGREEMENT ("LICENSE AGREEMENT") IS A LEGAL AGREEMENT BETWEEN CLIENT AND MSCRM-ADDONS.COM. READ IT CAREFULLY BEFORE USING THE SOFTWARE. IT PROVIDES A LICENSE TO USE THE SOFTWARE AND CONTAINS WARRANTY INFORMATION, LIABILITY DISCLAIMERS AND	~
I accept the terms in the license agreement Print	
I do not accept the terms in the license agreement InstallShield Kext > Cancel Cancel	

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

1	DocumentsCorePa	ck Client for Dy	namics 365	x
	dy to Install the Program e wizard is ready to begin installation.		mscrm-ac DocumentsCorePo	dons.com
If	ck Install to begin the installation. you want to review or change any of it the wizard.	your installation setti	ngs, dick Back. Cl	ick Cancel to
InstallSi	nield	< Back	Install	Cancel

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.

	l	ogon 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 Connectio	Advanced Settings	Log					
Existing Profiles	HKLM] crm.crmtest.local:	5555		~	Manage		
Select your Dynamics	365 Type						
OnPremise		/Hosted	O Online				
Dynamics 365 Server-U	Jrl:						
http://crm.crmtest.	local:5555				✓		
Authenticated as:	tials crmtest.local\adn ator Dor	ninistrator main crmtest.local	Password	•••••			
	Γ	Retrieve all					
Organization information	Lion:						
Friendly name	Unique name	ServiceURL					
👷 Standard	Standard	Standard					
2016 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 "**CrmUseIntegratedSecurity**". Change the value to "**true**".

1 Alian A	Registry Edi	tor	L	- 🗆 X	:		
File Edit View Favorites Help							
Second Se	Name	Туре	Data	[^		
	ab (Default)	REG_SZ	(value not set)				
HKEY_CURRENT_USER =	ab CrmCertificatePath	REG_SZ					
A - HKEY_LOCAL_MACHINE	ab CrmConnectionType	REG_SZ	0				
▶]] BCD0000000	CrmDiscoveryName	REG_SZ	http://crm:5555				
DRIVERS	ab CrmDomain	REG_SZ					
▶ J HARDWARE	ab CrmPassWord	REG_SZ	Gs04WyKXhxbFo78WIEKvhA==				
Þ. 🔐 SAM	ab CrmServerName	REG_SZ	http://				
SECURITY	ab CrmUseHttps	REG_SZ	False				
A - AspNetProcess	Representation and the security and the	REG_SZ	True		=		
Classes	Edit S	tring	x				
D- Clients			m:5555 - Standard				
M Providers	Value name:		alse				
Macromedia	CrmUseIntegratedSecurity	ttp://crm:5555/Standard/XRMServic	:es/2011/Orga				
⊿ J Microsoft	Value data:	Value data:					
NETFramework	True						
Active Setup	indel		alse				
⊳ J ADs		OK Cance	el				
▷ → ↓ Advanced INF Setup ▷ → ↓ ALG							
AllUserInstallAgent	egivir-AAppid	KE0_3Z					
AllOserInstallAgent	ab MFAAppPassword	REG_SZ					
	ab MFAAppUser	REG_SZ					
ASP.NET	MFAEndpointUri	REG_SZ					
Assistance	ab MFARedirectUri	REG_SZ					
AuthHost	MLB NLB	REG_SZ	False				
BestPractices	ab NLBEndPointUrl	REG_SZ REG SZ					
BidInterface	ab OrganisationFriendlyName	Standard					
Chkdsk	ab OrganisationName	REG_SZ	Standard				
COM3	erUserFieldName	REG_SZ	new_tiuser				
	ab ProxvCrmDomain	REG S7		>	Ť		
Computer\HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDV-3		RD22-C54B43B7E0C4		/			
Comparer (Filler _ LOCAL_IMACTINE (SOFTWARE (PTWEDV-	ysteme (Fromes (Co2) EATO-4EDF-4F2J-0	022 034043071004			:		

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 Connecti	on Advanced Settings	Log					
Existing Profiles	[HKLM] crm.crmtest.local:	5555	~	Manage			
- Select your Dynamics	365 Type						
OnPremise	O IFD,	/Hosted	Online				
Dynamics 365 Server-	Url:						
http://crm.crmtest	t.local:5555			✓			
Authenticated as:	ntials crmtest.local\adm rator Dor	ninistrator nain crmtest.local	Password ••••••	•			
	Γ	Retrieve all					
Organization information	ation:						
Friendly name	Unique name	ServiceURL					
👷 Standard	Standard	Standard					
2016 crm2016	crm2016	crm2016					
			ОК	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.

Search
Everywhere 🗸
regedit P
regedit
regedit
regedit. exe
regedit windows 8
regedit parameter

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 perfrom the following modification for these registry keys.

	Regi	stry Editor	
e Edit View Favorites Help			
Vindows Defender	Name	Туре	Data
	ab (Default)	REG_SZ	(value not set)
Windows Identity Foundation	ab ActiveProfile	REG_SZ	SOFTWARE\PTM EDV-Systeme\Profiles\C82FEA76-4EDF-4F25-8D22-C54B43B7F0
Windows Mail	adddocuments	REG_SZ	true
Windows Media Device Manager	autonewdoc	REG_SZ	false
Windows Media Foundation	ab characterset	REG_SZ	europe
Windows Messaging Subsystem	ab defaultactivitytype	REG_SZ	letter
Windows NT Windows Photo Viewer	ab defaulttype	REG_SZ	account
	ab donotupdatemetadataautomatically	REG_SZ	false
Vindows Portable Devices	ab dontshowdocxtemplatequestion	REG_SZ	true
▷	ab entitiesdontshow	REG_SZ	invoicedetail, quotedetail, salesorderdetail, opportunity product, new_mscrmaddor
	ablanguage	REG SZ	en
	A NEWDCPSEARCH	REG SZ	true
⊳	A NEWUIENABLED	REG SZ	true
MozillaPlugins	ab path	REG SZ	c:\program files (x86)\ptm edv-systeme gmbh\documents core pack client for d
D	ab showchangeconnection button	REG SZ	false
Policies	ab supportdotx	REG_SZ	true
▲ PTM EDV-Systeme			
ActivityToolsserver			
AttachmentExtractorserver			
AutoMergeserver			
DocumentsCorePackclient2011			
DocumentsCorePackserver			
GroupCalendarserver			
🛛 - 📗 Profiles			
		11	
puter\HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDV-5	Systeme\DocumentsCorePackclient2011		

Figure 21: Active profile

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

¥				Registry Editor		L=	
ile Ed	dit View	Favorites Help					
		2A4B5244-EB77-4DA	D-8888-31393C ^	Name	Туре	Data	
		2AA1C654-4D13-42F		(Default)	REG_SZ	(value not set)	
)	2D197993-2E7F-402F		CrmCertificatePath	REG_SZ		
		3E376F94-FD41-4470		CrmConnectionType	REG_SZ	0	
		4029F522-4227-4A89		ab CrmDiscoveryName	REG_SZ	http://crm:5555	
		5008B603-90E2-43CE		ab CrmDomain	REG_SZ		
		5047E259-7B39-4F72		ab CrmPassWord	REG_SZ	Gs04WyKXhxbFo78WIEKvhA==	
		52288444-1E9A-4FD9		ab CrmServerName	REG_SZ	http://	
		55A8447B-8EBB-4C6		ab CrmUseHttps	REG_SZ	False	
		5B6911E1-7436-4034 69E345F2-EC99-44C4		ab CrmUseIntegratedSecurity	REG_SZ	True	
		6DDAF540-9B27-42B		ab CrmUserName	REG_SZ		
		6E9F0117-FE5E-4FB5		ab Description	REG_SZ	crm:5555 - Standard	
		79CFDD7C-CA47-41		ab DisableDefaultProxy	REG SZ	False	
		79DB4359-64AF-4A3		ab DiscoveryCrmServiceUrl	REG_SZ	http://crm:5555/Standard/XRM	Services/
		7A4E138B-9A18-425		ab DiscoveryMetabaseServiceUrl	REG_SZ		
		7A4E6524-D1EF-437		ab HttpsDiscovery	REG_SZ	False	
	1	7B303CFB-EAE9-433	D-B68B-152D77	ab isMSO365	REG SZ	False	
		7FBE8B58-7B7F-4A0	A-88B1-AC5894	ab LastUpdateAdalCRM	REG_SZ	0	
		83A9FC2B-6975-49F	B-9AAC-DAAB2	ab LastUpdateAdalSP	REG SZ	0	
		A3713093-0845-4104	-90A4-9021C8F	ab MFAAppld	REG SZ		
		A37FC0E3-EE69-4CE	F-96DE-E5138C	ab MFAAppPassword	REG SZ		
		AC7AC0D3-4E8C-45	2B-A84A-0A220	ab MFAAppUser	REG SZ		
		C82FEA76-4EDF-4F2	5-8D22-C54B43	ab MFAEndpointUri	REG SZ		
		C9B1D48B-DEA2-485	59-9D0E-4CA5B	ab MFARedirectUri	REG SZ		
		CC768D2E-E4C5-444	6-AA4A-EE1497	ab NLB	REG SZ	False	
		DA0D71E4-010E-4E2		ab NLBEndPointUrl	REG SZ		
		FA11E2FD-6138-4EC	B-8CD7-84CBA	ab OrganisationFriendlyName	REG_SZ	Standard	
		nartBarserver		ab OrganisationName	REG SZ	Standard	
		lephoneIntegrationse	rver	ab PerUserFieldName	REG SZ	new tiuser	
		ndefinedserver	~	ab ProxyCrmDomain	REG_SZ		
		ill i	>	<			3

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.

r		Registry Editor		_ 0	x
ile Edit	View Favorites Help				
		Name	Туре	Data	
		(Default)	REG_SZ	(value not set)	
	D197993-2E7F-402F-9F64-6032AD5	ab CrmCertificatePath	REG_SZ		
	3E376F94-FD41-447C-9573-385CCD3	(ab) CrmConnectionType	REG_SZ	0	
	4029F522-4227-4A89-B5A8-8004143	ab CrmDiscoveryName	REG_SZ	http://crm:5555	
		ab CrmDomain	REG_SZ		
	5047E259-7B39-4F72-ADA5-703E107	ab CrmPassWord	REG SZ	Gs04WyKXhxbFo78WIEKvhA==	
	52288444-1E9A-4FD9-9425-EC5E1AF	(ab) CrmServerName	REG SZ	http://	
	55A8447B-8EBB-4C6C-B836-8C2486	ab CrmUseHttps	REG SZ	False	
	5B6911E1-7436-4034-816A-5C7A551	ab CrmUseIntegratedSecurity	REG SZ	True	
	69E345F2-EC99-44C4-AF80-C8067D1	CrmUserName	REG_SZ	admin@onmicrosoft.com	
		ab Description	REG SZ	crm:5555 - Standard	
		Description	KE0_32		
		Edit Strir	ng	alse ttp://crm:5555/Standard/XRMServio	
				ttp://crm:5555/standard/XRIVIServi	ices/2
		Value name:			
		CmUserName		alse	
		Value data:		alse	
		EnterYourUsemame@onmicrosoft.com			
		Enter rourosentaniejeoninicrosoit.com			
	A3713093-0845-4104-90A4-9021C8F		OK Canc	el	
	AC7AC0D3-4E8C-452B-A84A-0A220	MFAAppUser	KEG_SZ		
	C82FEA76-4EDF-4F25-8D22-C54B43	ab MFAEndpointUri	REG_SZ		
	C9B1D48B-DEA2-4859-9D0E-4CA5B	MFARedirectUri	REG_SZ		
	CC768D2E-E4C5-4446-AA4A-EE1497	ab NLB	REG_SZ	False	
	DA0D71E4-010E-4E22-9C3A-012562	ab NLBEndPointUrl	REG_SZ		
	→ FA11E2FD-6138-4ECB-8CD7-84CBA	ab OrganisationFriendlyName	REG_SZ	Standard	
		ab OrganisationName	REG SZ	Standard	
	TelephoneIntegrationserver	ab PerUserFieldName	REG SZ	new_tiuser	
	Undefinedserver	ab ProxyCrmDomain	REG_SZ	· · · · · · · · · · · · · · · · · · ·	
					>

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.

 5								Document	1 - Word		Administ	rator@crmtest.local	Ŧ		×
File	Home	Insert	Design	Layout	References	Mailings	Review	View	Developer	Help	www.mscrm-addons.com	n Q Tell me		∕Q s⊦	nare
K Open ⊂ Save T Save T Sav	Use Date Date Date Date Date Date Date Dat	ername: Iomain:	nformation i	Usemame	cor the process			Stand Organiz	ard	10 • 1 • 11 •	ı • 12 • ı • 13 • ı • 14 • ı • 15	т • _С , • т • 17 • т • 18 ·			*

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:

[YOURCRMSERVER: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 Mirosoft Word. While not vital, it should be changed to reflect the correct organisation name.

If your discoveryservice is using https (usually, it is the same protocol as your 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).

	Programs and	d Features		_ 🗆 X					
🛞 🔄 👻 🕆 🕅 > Control Panel > All Control Panel Items > Programs and Features 🗸 🗸 Search Programs and Features									
Control Panel Home View installed updates ® Turn Windows features on or	Uninstall or change a program To uninstall a program, select it from the list and th	en click Uninstall, Change, or Repair.							
off	Organize 👻 Uninstall			::: 👻 🔞					
Install a program from the network	Name	Publisher	Installed On Size	Version \land					
network	ActivityTools for Dynamics 365	PTM EDV-Systeme GmbH	19.12.2017 13,2 ME	3 2017.15					
	ActivityTools for MS CRM 2015	PTM EDV-Systeme GmbH	14.01.2015 55,1 ME	3 2015.3					
	Attachment Extractor Server for Dynamics 365	PTM EDV-Systeme GmbH	22.03.2018 37,7 ME	3 2017.8					
	DocumentsCorePack Client for Dynamics 365	PTM EDV-Systeme GmbH	18.12.2018 47,6 ME	3 9.20					
	DocumentsCorePack Server for Dynamics 365	PTM EDV-Systeme GmbH	05.11.2018 122 ME	3 2017.166					
	📀 Fiddler	Telerik	10.05.2016 3,94 ME	3 4.6.2.3					
	🧒 Foxit Cloud	Foxit Software Inc.	03.03.2015 6,73 ME	3 2.3.25.1124					
	🕝 Foxit Reader	Foxit Software Inc.	03.03.2015 94,6 ME	3 7.0.6.1126					
	💿 Google Chrome	Google Inc.	01.10.2014	71.0.3578.98					
	GroupCalendar for Dynamics 365	PTM EDV-Systeme GmbH	10.10.2017 71,1 ME	3 2017.7 🗸					
	<	III		>					
	PTM EDV-Systeme GmbH Product versi Help li		t link: www.mscrm-addons.co Size: 47,6 MB	im					

Figure 25: Uninstall DCP Client for Dynamics 365

Following window appears:

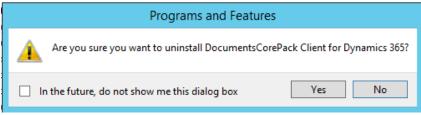


Figure 26: Uninstall-window DCP Client for Dynamics 365

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 <u>http://blogs.mscrm-addons.com</u> or contact <u>support@mscrm-addons.com</u>.

For sales and licensing questions please contact <u>office@mscrm-addons.com</u> or the corresponding contact information below.



Headquarter – Europe

PTM EDV-Systeme GmbH Bahnhofgürtel 59 A-8020 Graz Austria

Tel Austria +43 316 680-880-0 Fax +43 316 680-880-25

Support: 7AM - 8PM GMT+1 (Monday-Friday)

Headquarter – US

mscrm-addons.com Corp 1860 North Rock Springs Rd Atlanta, GA 30324 United States

Tel US +1 404 720 6066

Support: 9AM - 6PM EST (Monday-Friday)

Sales: +43 316 680 880 14 sales@mscrm-addons.com

www.ptm-edv.at www.mscrm-addons.com Sales: +1 404 720 6046 ussales@mscrm-addons.com

www.mscrm-addons.com