



# DocumentsCorePack Installation Guide for MS Dynamics 365 April 2023



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# Preamble

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

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

# **Target Audience**

This guide is intended for users installing DocumentsCorePack for Microsoft Dynamics 365 with the following basic skills:

- Basic Microsoft Dynamics 365 Knowledge
- Maintaining and configuring a Microsoft CRM Organization

# Supported Web Browsers and versions

Supported Web Browsers:

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

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

- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online



# 1. How to install the DocumentsCorePack

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

Additional organizations can be set up by the installation manager after the original setup has finished.

#### 1.1. Prerequisites

Before you start the installation, you have to download the DocumentsCorePack Application. You can download files <u>here</u>.

#### 1.2. Install directly on a Dynamics 365 On-Premise Server

When you want to use Dynamics 365, you can install DocumentsCorePack on every supported operating system. You must specify a valid Dynamics 365 profile. In this case, you have limited functionality of DocumentsCorePack. You cannot use the following features:

- SharePoint Folder and Site integration
- File Explorer integration



After the setup, you can start the DocumentsCorePack Configuration in the Windows Start menu to install and configure DocumentsCorePack in other Dynamics 365 organizations.



# 2. Installation of the DocumentsCorePack Server

This chapter explains how to install the Server component. It is important to ensure that the machine is online to the Dynamics 365 server.

#### 2.1. Online Service Configuration

The setup allows users to configure DocumentsCorePack Document Generation for Microsoft Dynamics 365 Online without local installations. The service, as well as licensing, can be configured and maintained on our website.

For detailed information on OnPremise installations please read

Follow the links below for additional information:

- <u>Start Trial/Configure Services for DocumentsCorePack for Microsoft Dynamics</u> 365
- Watch our DocumentsCorePack ServerBased Online Configuration <u>YouTube</u> <u>Video</u>
- DocumentsCorePack User Guide

#### 2.2. Installation

Run the "**DocumentsCorePack Server for MS Dynamics 365.exe**" setup file. You will see the following window:

Hit the **1** Next button to continue with the license agreement.





Figure 1: DocumentsCorePack installer for Dynamics 365



# 2.3. End User License Agreement (EULA)

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

🖟 DocumentsCorePack Server for Dyna	mics 365				Х
License Agreement		40	mscrm-	addons.c	om
Please read the following license agreem carefully.	ient			ePack for Dynami	cs 365
FORM OF END US	ER LICEN	SE AG	REEMENT		^
MSCRM-ADDONS.COM SOF	TWARE	LICEN	SE AGREE	MENT	
IMPORTANT: THIS SOFTWAR	E LICENS	SE AG	REEMENT (	"LICENSE	
AGREEMENT") IS A LEGAL AG	GREEMEN	T BET	WEEN CLIE	NT AND	
MSCRM-ADDONS.COM. READ	IT CARE	FULLY	BEFORE U	SING THE	
SOFTWARE. IT PROVIDES A I	ICENSE	TO US	E THE SOF	TWARE	
AND CONTAINS WARRANTY I	NFORMA	TION,	LIABILITY		~
I accept the terms in the license agreeme	ent			Print	
O I do not accept the terms in the license a	greement				
InstallShield					
	< Bac	<	Next >	Cancel	

Figure 2: End User License Agreement (EULA)

## 2.4. Confirm the installation

If you want to change any of your installation settings, please hit the **1 Back** button or you can **2 Change** the installation folder as shown in the figure below. Click **3 Next** to proceed.



🛃 Docume	ntsCorePack Server for Dynamics 365 X
	on Folder t to install to this folder, or click Change to a different folder.
	Install DocumentsCorePack Server for Dynamics 365 to: C:\Program Files (x86)\PTM EDV-Systeme GmbH\DocumentsCorePack Server for Microsoft Dynamics 365\ Change
InstallShield -	1 3
margina -	< Back Next > Cancel

Figure 3: Confirm with Install



If you want to review or change any of your installation settings, click **1** Back. Click **2** Cancel to exit the wizard and **3** Install to proceed.

BocumentsCorePack Server for Dynamics 365	×
<b>Ready to Install the Program</b> The wizard is ready to begin installation.	mscrm-addons.com DocumentsCorePack for Dynamics 365
Click Install to begin the installation.	
If you want to review or change any of your installat the wizard.	tion settings, click Back. Click Cancel to exit
InstallShield1	ack Install Cancel

Figure 4: Install the program

## 2.5. Install the Windows Identify Foundation

To use the DocumentsCorePack Server for Microsoft Dynamics 365 you have to install the Windows Identify Foundation. This window will pop up when the Window Identify Foundation is not installed.



Microsoft WSF PrerequisiteInstaller	0
Welcome to the WIF Prerequisite Installer. Detection	linished
Identified OS: Windows 7 64-bit	
OS Architecture: 64 bit	
WIF Installation Status : NOT Installed	
Instal	Cancel

Figure 5: Install Windows Identify Foundation



## 2.6. Configure Dynamics 365 Server

Next, you must configure your Dynamics 365 server. Select your **1** Existing Profile or create a new profile and select your **2** Dynamics 365 type. Choose the **3** Dynamics 365 Server-URL and add your login credentials by filling in the **4** Use default Credentials like username, password and domain fields. Click on the **5** Retrieve all button and as soon as the organizations are retrieved, choose the respective one and press the **6** OK button.

Logon information - DocumentsCorePack Server Based generation (2020.136)								
Welcome to yo	ur Dynamics 365	Connection se	tup.					
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 L	og						
Existing Profiles 🚺			▼ Manage	New				
Select your Dynamics	365 Type 2							
C OnPremise	C IFD/Hosted	C Online	C AppAccess					
Dynamics 365 Server-	Url:							
Copy your Dynam	nics 365 Url here			3				
Authenticated as:								
Use default Creden	tials Not enough informat	ion 4						
Username	Domai	n	Password					
-								
		Retrieve all Organiza	5					
Organization information	-							
Friendly name	4	erviceURL						
			6					
			ОК	Cancel				
			I.					

Figure 6: Dynamics 365 Connection setup





If an old DocumentsCorePack version is detected during installation, you will be prompted to uninstall.

# 2.7. 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 being able to perform the license-check.

#### **Product-specific security roles:**

The 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



🛃 Docur	nentsCorePack Server f	or Dynamics 36	5			$\times$	
	ng DocumentsCorePack rogram features you selected.			DocumentsCor			
15	unqfe	1aed000	d: Allow set	tup to changi	ng se >	<	
Setup is about to apply the following security roles to all users: mscrm-addons general security role MSCRM-ADDONS.com AutoMerge DocumentsCorePack Security Role If you want to skip this step, please press No. ATTENTION : 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!							
InstallShie				Yes	No		
		<	Back	Next >	Can	cel	

Figure 7: Security roles

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



If you skip this step, you will be required to either manually assign the roles to all users or to include the required rights into your existing security roles.



If SharePoint is already configured in your Dynamics 365 system, the following window will appear. Confirm with **Yes** to allow the DocumentsCorePack Server setup to use SharePoint. Click **No** to skip this step.

🛃 Docume	entsCorePack Server for Dynamics 365			$\times$					
Installing	j DocumentsCorePack	scrm- <b>a</b>	ddons	.com					
The pro installed	gran reactives you selected are being	umentsCoreP	ack for Dyn	amics 365					
1 <del>7</del>	Please wait while the InstallShield Wizard installs DocumentsCorePack Server for Dynamics 365. This may take several minutes.								
	DocumentsCorePack Server Setup - Prerequisites inst	aller	×						
	DocumentsCorePack has detected a default configuration in your Dynamics 365. Should DocumentsCorePack try to use this o								
	Yes	N	•						
InstallShield									
	< Back Ne	ext >	Cano	el					

*Figure 8: Default SharePoint configuration detected* 



## 2.8. Finish the installation

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



If an obsolete product has been detected during the setup, you will be asked to delete these unnecessary product(s) to avoid confusion between the two products.



Figure 9: Finish installation



# 2.9. Organization overview

After finishing the configuration, the **Organization overview** window opens. With a click on the configuration, you have the option to edit the service.



To open the **Organization overview** again, after closing, search in the Windows Start pane **Configuration – DocumentsCorePack for Dynamics 365**.

🐌 View Organization Ir	nstallation States - Docum	nentsCorePa	ck 2020.136			- 🗆 X
Organization o Please select an orga configuration or licer	nization in the list to	access org	anization specific functionalities, lik	e	Documents Co	-addons.com orePack for Dynamics 365
			Availabl	e Organizations:		×
Friendly name	Unique name unq	1aed	Installation State DocumentsCorePack is INSTALLED	BuildNr. 2020.136	AutoMergeGlobalButton 2020.196	DocumentsCorePack by m 2020.136
<						2
Get IFD Setup						Close

Figure 10: Organization overview



# 2.10. Organization overview – Function buttons

After choosing an organization in the Organization overview window, the several function buttons will appear at the bottom of the window.

Drganization O lease select an orga onfiguration or licen	nization in the list to access o	organization specific functionalities, like	2	mscrm-addons.	COM nics 365
		Available	e Organizations:		```
Friendly name	Unique name	Installation State	BuildNr.	DocumentsCorePack by mscrm-addons.com	Docum
CRM168820	unqfe9a36ddb2d3ed11aec	I DocumentsCorePack is INSTALLED	2020.136	2020.136	2020.2
	2 3	4 5			

Figure 11: Organization over - function buttons

**1 Reinstall/Upgrade**: Upgrade your solution to the latest version.

**2** 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 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).

**3 Uninstall:** With a click on this button, you have the option to uninstall DocumentsCorePack from the selected organization. Before it is uninstalled, you will be provided with the Uninstall window. Here, click on the **Yes** button to uninstall the service or click on the **No** button to cancel.

4 An **IFD setup** is only required when using FileExplorer or SharePoint Folder and Sites Integration. Therefore, you must install IFD before you can use it via this button.

**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.



## 2.11. Client & Server Based generation settings

Hit the **Launch** button to open the settings for **Client** and/or **Server Based Document Generation**. The window that opens provides you with a few tabs to help you configure your Client and Server Based Generation settings. Here, users can configure which entities the Server and/or Client Based button should appear for and rename the button label. (For example, configure which entities you want to see for the **Export** button).

Configurations -	Close	
Client & Server Based generation setting Configure Client & Server Based document generation s		Launch
Enable debugging (Caution! Slow)		
Service Configuration Set up a service for Server Based Document Generation print jobs	in Dynamics 365-	Launch Online and

Figure 12: Configurations



# 1.12. The Command bar tab

The options in the **CommandBar** tab help you to configure the CommandBar button visibility and the formatting for the Server Based and Client Based Document Generation.

Here users can configure the entities where you want them to show, as well as display the name of these buttons:

- The **Export To Word** button for the Client Based Document Generation
- The **Create Document** button for the Server Based Document Generation

DocumentsCorePack Server Config v2020.136 // unqfe9a36ddb2d3ed11aed0000d3a64d @ https:/       —       X         CommandBar       General Settings       SharePoint       Advanced         Use these options to configure commandbar button visibility and formatting for the Server Based and Client Based Document Generation       Server Based Document Generation (Trial)         Button label       Export to Word       Details       Button label       Create Document       Details						
Advanced Template Group Filtering						
CommandBar Configuration						
Entity Name	Have Client Based Button (select all)	Have Server Based Button (select all)	^			
AAD User						
Account						
Account Project Price List						
Action Call						
Action Call Workflow						
Action Card						
Action Card Regarding						
Action Card Role Setting						
Activity File Attachment						
Actual						
Actual Data Export (Deprecated)						
Adaptive Card Configuration						
Address						
AddToCalendar style			¥			
		OK Cance	:1			



#### 2.12.1. Client Based document generation

This section contains all settings for Client Based Document Generation. With a click on **Export to Word**, you can define a different name for the **Button label**.

Client Based Document Generation	on
Button label Export to Word	Details
Advanced Template Group Filter	ing

*Figure 13: Client Based Document Generation* 

With a click on **Details**, the **Edit Ribbon & Navigationbar resources** window opens.

The editor allows you to modify the default ribbon and navigation bar icons and labels supplied by DocumentsCorePack server.



Image resources must be available as web resources in CRM to be able to use. Use the refresh button on each control to reload the list of available resources.

**1 Icons**: The Icons tab of this configuration window gives you the possibility to change the icons of the buttons. The icons are Dynamics 365 web resources, which you can upload yourself with the standard Dynamics 365 functionality.



	o the Ribbon & Navigationbar Ressource editor ws you to modify the default ribbon and navigation bar icons and lab	els supplie	d by	
cumentsCor	ePack server. Please note that image resources must be available as	webresour	ces in (	CRM to be ab
e. Ur 🤈 ne	refresh button on each control to reload the list of available resource	es		
50				
ns Labels				
Ribbonlcons				
nubbonneons.				
16x16	MSCRM-ADDONS.com ptm_dcp_icon_exportword16x16	~	2	Default
	MSCRM-ADDONS.com ptm_dcp_icon_exportword16x16			Default
	Cadence_Complete.png			
	textcolor.png			
	Back			
	msdyn_LeadScore_Loading_16.gif			
	SaveAsComplete_16.png			
	preview.png icons.png			
	cut-rtl.png			
	SetAsDefaultConfiguration 32			
	omg_smile.png			
	unsubscribe.png			
	thumbs_down.png			
	Email Article			
	icons.png Service/ imgs/ribbon/Attachment 32.png			
	iostore.png			
	reset.png			
	preview.png			
	AppCommon/_imgs/Ribbon/EmailToCaseOfQueue_32.png			
	Service/_imgs/ribbon/ReactivateCase_16.png			
	HideGantt_16 (Deprecated in v3.0)	-		
	sucess.png (Deprecated in v3.0)			
	lock.png			Close
	arrow_right_blue.png			

Figure 14: Ribbon and Navigation bar resources

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

Edit Rik	bon & Nav	vigationbar ressource	5			
This ea Docun	ditor allow	vs you to modify t Pack server. Pleas	& Navigationbar Ressource editor he default ribbon and navigation bar icons and labels supplied by e note that image resources must be available as webresources in CRM to be each control to reload the list of available resources	able		
lcons	Labels			_		
			Create Document - SubGrid	^		
	LCID	Language	Label			
•	1033	English (United	Export to Word			
	_		Create Document - Grid	-		
	LCID	Language	Label			
•	1033	English (United	Export to Word			
			Create Document - Form			
	LCID	Language	Label			
•	1033	English (United	Export to Word			
	Create Document - SubGrid in Outlook					
	LCID	Language	Label			
•	1033	English (United	Export to Word			
	_		Create Document - Grid in Outlook	~		
			Clo	se		

Figure 15: Labels tab



**Advanced Template Group Filtering**: This feature offers the option to set a filter for DocumentsCorePack templates.

Advanced template filtering	-		$\times$		
Welcome to the advanced group filtering for templates With this form, you can link attributes of specific entities to the group field of the DCP templates entity					
Click here for Blog article					
Entityname	Template Group Filter Field	*			
	ОК	Cance	el		

Figure 16: Advanced template filtering



While saving the changes, the following window will appear. Click **OK** to continue saving. **IMPORTANT**: DO NOT KILL the process when it freezes. This could cause inconsistent data in Dynamics 365. You have to wait until the configuration is finished. Click **Cancel** to save a later time.

DocumentsCorePack Server for Dynamics 365	×	
Are you sure you want to save all settings now? Depending on the selected configuration and server performance it could take up to an hour to complete. Also the Dynamics 365 server will respond very slowly during the save process. It is strongly recommended to save the configuration outside the business hours.		
- Press "OK" to continue saving - IMPORTANT: DO NOT KILL the process when it freezes. This could cause inconsistent data in Dynamics 365. You have to wait until the configuration is finished - Press "Cancel" to save a later time		
OK Cancel		

Figure 178: Save settings



#### 2.12.2. Server Based document generation

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

All our addons come with a 14-days trial license. If the trial license is 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 should this occur.

Server Based Document Generation (Trial)					
Button label Crea	ate Document	Details			

Figure 18: Server Based Document Generation (Trial)



#### 2.12.3. Command bar Configuration

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

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

**2** Activating the checkboxes will select the **Server Based Document** Generation Button **Create Document** for the selected entity.

Entity Name	Have Client Based Button (select all)	Have Server Based Button (select all)	
wkwconfig			
Work Order	$\checkmark$		
Work Order Business Process	$\checkmark$		
Work Order Characteristic (Deprecated)			
Work Order Details Generation Queue (Deprecated)	$\checkmark$		
Work Order Incident			
Work Order Product	$\checkmark$		
Work Order Resolution			
Work Order Service			
Work Order Service Task			
Work Order Substatus			
Work Order Type			
Work Stream			
Work template			

Figure 19: Command bar configuration

### 1.13. The General Setting tab

**1 Import/Export Templates**: For more information about the import/export of DCP templates, please have a look at chapter 6.2 Import/export existing DocumentsCorePack templates on page 45.

**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 have a look at chapter 7 Language Settings for DocumentsCorePack on page 48.



**3 Debug**: Please leave this option unchecked. It is used by our support for bug fixing.

**4 Data Source**: Here you can select the type of data source. This contains cached information from Dynamics 365, which can be used with the DocumentsCorePack Client.

**5** Names to Cut: This functionality is depreciated.

**6 Replace Special Characters**: Treats special exceptions or certain coding problems with Dynamics 365.

**7** Additional Entities: DocumentsCorePack only shows customizable entities by default. If you want to use other entities for DocumentsCorePack, you must define them here.

8 **Entities don't show**: Entities that are registered here will be hidden and are not useable/visible within DocumentsCorePack.

9 Unavailable entities: Entities which are not included in the metadata cache.

**(1)** Folder Displayattribute: Here you can define the attribute for each entity that should be used for the folder name (affects SharePoint AND File Explorer). You can ignore this setting if you don't save your documents in one of these locations. Per default the "name" attribute is used.

**1** Metadata Cache (Not Created): Create your metadata and save it to a local location. This is the fasted way to download metadata to the client. Please note: once created, this functionality needs to be updated manually!

**Server Based Document Generation Settings**: With a click on this button, users will access the "AutoMerge Config" in DocumentsCorePack to set up a service for Server Based Document Generation in CRM-Online and print jobs. For detailed information, please read chapter 2.5 Service Configuration on page 23.



Import DCP Templa	ates 🛄 Export All Templates
2 Language	en 🗸
3 Debug	
Datasource:	user-dependent 🗸 🗸
5 Names to cut	parentcustomerid-pc1,parentaccountid- pa1,nationnameid-nn1
6 Replace Special Character	rs    ,– -,   &:#v000D:1
7 Additional Entities	pricelevel, territory
8 Entities don't show	invoicedetail, quotedetail, opportunity o
9 Unavailable Entities	accountleads, annualfiscal calendar, ap plication file, as yn coperation, attachme
10 Folder Displayattribute —	
Here you can define the entity which should be	used for the
foldername (affects bot File Explorer). You could setting when you don't documents in one of th default the "name" attri	I ignore this Configure for entitites t save your is locations. Per
Metadata Cache (Not crea	ated) : Create
12 Server Ba	ased Document Generation Settings

Figure 20: General Settings tab



# 1.14. The Sharepoint tab

Here, you have the option to define your SharePoint settings, if you want to save documents to SharePoint. 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 Dynamics 365 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 and in MS CRM 2015. The DocumentsCorePack Client supports both SharePoint Integrations



To use the SharePoint integration, you must configure it within Dynamics 365. When enabled, the documents generated via the DocumentsCorePack Client will be saved in the Dynamics 365 specified SharePoint location for each record.



	ePack Server Config v2020.136 // unc s:/ — S General Settings SharePoint Advanced
	Save Documents in SharePoint
	CRM Integrated Save in Folders Save in Sites
	SharePoint Server
	Use HTTPS Configure Certificate
	Root Site
	Template v 🖸
	Document Library Name
	Entity Specific Sites Configure
	Entity Relation Sites Configure
	Entity Site Name Configure
	Use Unique Permissions
	Activity Settings
	Here you can configure Configure Entities
	created documents for an
	entity
	SharePoint Documents NavBar Name SharePoint Documents
_	OK Cancel
ure 21: Share	



# 1.15. Service Configuration

To open the Service Configuration, please search for **"Configuration – DocumentsCorePack for Dynamics 365"** in the Windows start menu and run this application.

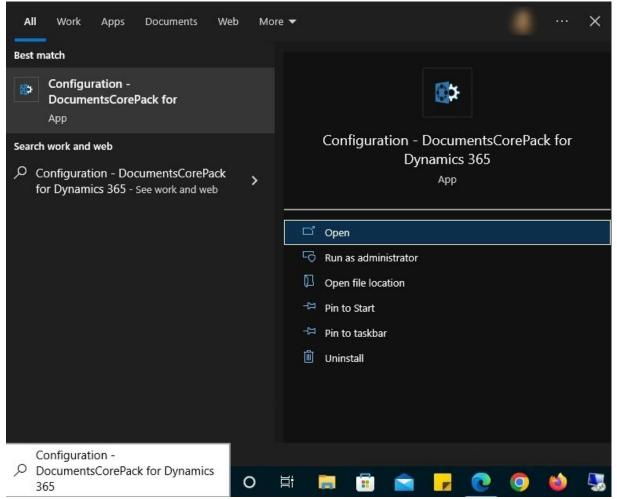


Figure 22: Look for DCP Configuration in task pane

#### 2.15.1 The General tab

Within the **General** tab, define a name for your service and specify the logfile-path. You are also able to activate debugging if there is a problem with your service. Click on the **Save service configuration** button to continue.



) DocumentsCorePack Server - Management (v. 2020.136) — 🗆 🗙
Velcome to the DocumentsCorePack Service Overview is tool will help you create and manage your merge services DocumentsCorePack for Dynamics 365
dd New Service   New service setup   ctive Services   active Services   © DCP     Service Logon - [ConnectionSetup / PinterConfigurations]   © local system account   © custom account   © custom account   © custom account   Service Digree   Ceneral     Logflie Path:   © deter:   Activate Debugging   Batch Size:   Deter:   Activate Debugging   Batch Size:   Deter:   Other:   Activate Debugging   Batch Size:   Deter:   Idle loop time in seconds   Category:   Deter:   Other:   Idle loop time in seconds   Category:   Deter:   Idle loop time in seconds   Category:   Distributing to plots   Idle loop time in seconds   Category:   Distributing to plots   Idle loop time in seconds   Category:   Inter:   Inter: </td
Stop Service Start Service Delete Save service configuration
bal: Registering HeartBeatService

Figure 23: General tab



#### 2.15.2. The Dynamics 365 Connection Setup tab

Again, you must specify your Dynamics 365 connection in the Dynamics 365 Connection Setup. Click on the **Save service configuration** to continue.

😥 DocumentsCorePack Server - Management (	v. 2020.136)				– 🗆 X
Welcome to the DocumentsCol This tool will help you create and manage		verview			entsCorePack for Dynamics 365
Add New Service	A CONTRACTOR OF A CONTRACTOR OFTA CONTRACTOR O	65 Connection Setup	cense Log Printer		
New service setup	- Select your Dynamic OnPremise	s 365 Type O IFD/Hosted	Online		
Active Services	Dynamics 365 Server	-Url:			
Inactive Services	https://org	.crm4.dynamics.co	m		*
🕸 DCP	Authenticated as:				
			You must complete the logon ar	Idow from Microsoft Dynamics appears. Ind consent process to continue.	
	Organization inform	nation:			
	Friendly name	Unique name	ServiceURL		
	CRM 0	unq 3	or		
					OK Cancel
	Advanced Option	15			Enable Teammembers
	Stop Service St	tart Service Delete			Save service configuration
global: Registering HeartBeatService					Close

Figure 24: Dynamics 365 Connection Setup

#### 2.15.3. The License tab

In the License tab, you can view the information about your license. In the example below, the license is valid.



DocumentsCorePack Server - Management (v. 2)	020.136)				– 🗆 ×	
Welcome to the DocumentsCorel This tool will help you create and manage you		iew		mscrm- DocumentsCo	addons.com prePack for Dynamics 365	
Add New Service	General Dynamics 365 Cor	nection Setup License Log	Printer			
🕸 New service setup	Your license is Valid					
Active Services	General license inform	nation (CRM 9	32)			
Inactive Services		Licensevalue		Systemvalue	Status	
	Licensemodel				0	
💩 DCP	Licensekey (Trial)	Trialkey			0	
	BusinessUnit	unqfel	a64d		*	
	Number of site licenses	1			*	
	Licenses for Readonly Users					
	Expiration	16/05/2023 08:23:59 (11 days	left)		0	
	Support					
	Issued product	DocumentsCorePack Server E	ased generation			
	Version upgrade covered	23/01/2023 09:20:28			•	
	License Status					
	LicenseState		trial		Δ	
	Stop Service Start Ser	vice Delete Lic	ensing	Si	ave service configuration	
global: Registering HeartBeatService					Close .::	

Figure 25: The license tab

# 2.15.4. The Log tab

See here the latest events and changes.



🔯 DocumentsCorePack Server - Management (v. 2	1020.136)	– 🗆 X
Welcome to the DocumentsCore This tool will help you create and manage yo		SCrm-addons.com cumentsCorePack for Dynamics 365
Add New Service	General Dynamics 365 Connection Setup License Log Printer	
New service setup	Message (Showing 12)	TimeStamp @
-	() DCP: Entering idle loop	2023-05-04 11:27:28
Active Services	DCP: OnStartDefault: LicenseCheck finished in 6,23s, lastcheck was 2023-05-04T09:26:46.2048655Z	2023-05-04 11:27:00
	AutoMergeService is updating ServiceLicenseMessage from source CheckLicenseKeyResult Clear grace	2023-05-04 11:27:00
😨 DCP	(i) DCP: Check for open working Items	2023-05-04 11:26:59
In a still Complete	This is the service with category:0	2023-05-04 11:26:59
Inactive Services	DCP skip checking license. License check is already in process.	2023-05-04 11:26:57
	DCP: Started successfully	2023-05-04 11:26:57
	DCP: Initialize Template Backup Timer.	2023-05-04 11:26:57
	DCP: Is using IntegratedFileFetch : enabled	2023-05-04 11:26:57
	DCP: RegMon onprem has started successfully	2023-05-04 11:26:55
	Updated AzureServiceName with value "none"	2023-05-04 11:26:54
	DCP: Service is starting	2023-05-04 11:26:52
	Stop Service Start Service Delete	Save service configuration
DCP:Service started		Close

Figure 26: The log tab

#### 2.15.5. The Printer tab

DocumentsCorePack now offers a service-based printing option, which is available in addition 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 that runs in the background. Learn more.



😥 DocumentsCorePack Server - Management (v. 2	2020.136)	– 🗆 X
Welcome to the DocumentsCore This tool will help you create and manage yo	Pack Service Overview ur merge services	Pack for Dynamics 365
Add New Service  New service setup  Active Services  Inactive Services  DCP	General Dynamics 365 Connection Setup License Log Printer         Saved PrinterConfigurations         ConfigurationName             ConfigurationName             Stop Service    Start Service Delete Saved Printer	Manage New Edit Copy
global: Registering HeartBeatService		Close

Figure 27: Printer tab

#### 1.16. Licensing

Learn in this guide all about licensing for Microsoft Dynamics 365.

### 1.17. Upgrade

To upgrade your DocumentsCorePack version, simply re-run the setup (find the newest version <u>here</u>).

The final step of the upgrade is to execute the DocumentsCorePack Configuration as shown in chapter 2.11. Client & Server Based generation settings. The configuration is necessary to upgrade DocumentsCorePack properly!



## 3. 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 (<u>Download Link</u>). You need to login on our web site.
- For installing DocumentsCorePack you need at least version 5.18 from our <u>Download Section</u>

Before you start installing, Dynamics 365 is required to be working correctly in IFD/Claims-Mode, including your ADFS, which should be installed correctly and configured to work with Dynamics 365.

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 from these URLs, so make sure you are replacing the URLs with your own 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



#### A step-by-step description for a Basic installation/configuration of our addon

**Please note**: There is no IFD Configuration required for DocumentsCorePack for MS CRM 2015 Installation.

**Step 1**: Install the addon on the Dynamics 365 Server.

**Step 2**: You will be asked for the login information. Fill in the internal IFD name of your Dynamics 365. In our case it is **internalcrm.rc1ifd.ptm-edv.at**. Select the organization on which you want to install the addon and click **OK**.

Create CRM connection profile				ж
You have to specify a valid CRM connection profile. The user with which you're connecting	g must be in the sys	tem administrate	or role to set up a service.	
This CRM connection profile is currently in use by a Service Configuration. You're only able	le to change the us	er credentials. Yo	ou also have to select the sa	me organization.
Select your connection type	Server2Server	App Access	App Access (custom)	IFD (hosted)
CRM URL				
Credentials - You need to specify administrative user credentials				
Username		Password	Your CRM password	
Retrieve Organizations				
			Verify Connection	n & Save Profile



**Step 3**: After the installation is finished, you must open the IIS (inetmgr.exe ) and go to Sites  $\rightarrow$  the Addon Website. Right click the DocumentsCorePackserver - WebSite and select **Edit Bindings...**.

<b>v</b> )	Internet Infor	mation Serv	ices (IIS) Mar	nager		
€ CRM20	13SRV1 > Sites >					
File View Help						
Connections	<b>O</b> TH				Act	tions
😂 - 🔛 🖄 🔗	Sites 🦉				9	Add V
Start Page	Filter	• 🐨 Ge	- Ghow A			Set W
b Microse B	Name ActivityToolsser Default Web Site	ID 5 1	Status Started (ht Started (ht Started (ht Started (ht	Binc *:55: *:80 *:55: *:55: :555	0	Help Online
in 1	witch to Content View					

**Step 4**: On the bindings click on **Add...** and select **https** in the **Add Site Binding**. You also must specify the port. In our example we use 4446. Now the web site is available for https. Click on the **OK** button.

			Site	Sindings	? >
Type http	Host Name	Port 5556	IP Address	Binding Informa	Add
			Add Sit	e Binding	7 ×
	Туре:	IP a	eddress:	Port	e
	http	¥ AI	Unassigned	v 4446	
	Host name:				
	Example: www.	contoso.co	m or marketing.co	ntoso.com	
_					
				OK	Cancel

**Step 5**: Reselect the addon website and double click on the "Authentication" item in the details pane on the right-side. Verify that the "Anonymous" and "ASP.Net Impersonation" settings are enabled.



**Step 6**: The addon URL needs to be added to your DNS Server. Your DNS-servers must resolve the **documentscorepackserver.[your-domain]** names correctly. That means that they should resolve it with the same IP address as your Dynamics 365 Server. If you have an external DNS, make sure that both the external and the internal DNS can resolve the URL.

**Step 7**: Extract the IFD-Tool (zip-file) that you downloaded before and execute the **IFDSetupWizard.exe**. Follow the steps in the IFD Setup carefully.

**Step 8**: Open your Dynamics 365 and go to "Settings" and then "MSCRMADDONS.com Products". Open the addon in the MSCRM-ADDONS.com products section, and then select the MSCRM-ADDONS.com Settingskeys and search for the "WebApplicationPort" entry.

Dyna	mics 36	5 Settings ~	Products >	GroupCale	ndar >							
w Alerts (8	3) Latest: You	ve got an alert for the mailbox	'John Snow'. 4/30/2	023 9:47 AM	View Alerts							
ew 🗟	DEACTIVATE	DELETE 📲 EXPORT	T TO WORD	😫 CREATE	DOCUMENT	🖘 EMAIL A LINK	👶 RUN WORKFL	OW 🗈 STAR	T DIALOG 🚽	FLOW -	•••	
		MSCRM-ADDONS.COM	PRODUCTS : I	INFORMATI	ON							
		GroupCalenda	r <b>*</b> ≣									
		▲ General										
		Name *	GroupCalen	dar						Subscrip	otion Number	
		Product Type	server							Schedul	er	GroupCalendar Scheduler
		Search Results v										
		WebApplicationPort										
		Name 个			KeyValue			IsCached	Created On	I.		
		WebApplicationPort		ł	nttps://group	calendar2015EUW	001.mscrm-a	Yes	4/6/2020 1:	50		

**Step 9**: Open the **WebApplicationPort** and replace the existing KeyValue with the following: [httpsPort] [[httpPort]] [[claimsbased] [[addonname]] [[debugging]]

Example: 4446|5557|true|activitytoolsserver|false

We have finished the configuration of the Dynamics 365 part and now need to configure the **AD FS**.

**Step 10**: Please log onto your AD FS Server and start AD FS 2.0 Management.



**Step 11**: On the action menu located in the right column, click **Add Relying Party Trust**.

Step 12: In the Add Relying Party Trust wizard, click Start.

**Step 13**: 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 Dynamics 365 server. Example:

https://activitytoolsserver.rc1ifd.ptmedv.at:4446/FederationMetadata/200706/Federat ionMetadata.xml

**Step 14**: Type this URL in your browser and verify that no certificate-related warnings appear and click **Next**.

**Step 15**: On the **Specify Display Name** page, type in a display name, such as **DocumentsCorePack IFD**, and click on **Next**.

**Step 16**: On the **Choose Issuance Authorization Rules** page, leave the **Permit all users to access this relying party** option selected and then click **Next**.

Step 17: On the Ready to Add Trust page, click Next and then Close.

**Step 18**: 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.

**Step 19**: In the **Claim rule template** list, select the **Pass Through or Filter an Incoming Claim** template, and then click **Next**.

**Step 20**: Create the following rule:

- **Claim rule name**: Pass Through UPN (or something descriptive)
- Add the following mapping:
  - Incoming claim type: UPN
  - Pass through all claim values

Step 21: Click Finish.



#### Step 22: In the Rules Editor, click Add Rule.

Step 23: In the Claim rule template list, select the Transform an Incoming Claim template and then click Next.

**Step 24**: Create the following rule:

- Claim rule name: Transform Windows Account Name to Name (or something descriptive)
- Add the following mapping:
  - Incoming claim type: Windows account name
  - Outgoing claim type: Name
  - Pass through all claim values

**Step 25**: Click **Finish** and when you have created all three rules, click on **OK** to close the **Rules Editor**.

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

## 4. Troubleshooting

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

**Reason 1**: You may be using a wrong certificate for the AD FS signing. Make sure the thumbprint in the web.config matches the one of the token signing certificate in AD FS.

```
<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 snap-in 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 not any http/https bindings in Dynamics 365?
- Are there not any http/https bindings in the product's website?
- Is the DNS correctly resolving the products link?
- Has the ConnectionProfile been created with IFD as the connection type?

Server Error in '/' A	Application.
	the security token was not recognized by the IssuerNameRegistry. To accept security , configure the IssuerNameRegistry to return a valid name for this issuer.
Description: An unhanded exception peop	urred during the execution of the current was request. Please review the atack trace for more information about the error and where it originated in the code.
Exception Details: System.textty/lode configure the lassertione/Reporty to return a	Toters. SecurityToterException. D4175. The laster of the security biten was not recognized by the IssuentaneRegistry. To accept security timens from this Assuer, valid name for this assuer.
Source Error:	
	generated during the execution of the ourrent web request. Information regarding the origin and an be identified using the exception stack trace below.
Stack Trace:	
Wicrosoft IdentityWodel toke Wicrosoft IdentityWodel toke Wicrosoft IdentityWodel toke Wicrosoft IdentityWodel kwb. Wicrosoft IdentityWodel kwb. Wicrosoft IdentityWodel kwb. System Web. Systematiceution	: The issuer of the security taken was not recognized by the IssuerNameRegistry. To accest security takens from this ms.Samlli.SamlliSecurityTokenMandler.CreateClaims(SamlSecurityTokem samlSecurityTokem) +738 ms.SamlliSeamliSecurityTokenMandler.ValidateToken(SecurityTokem taken) +442 ms.SecurityTokenmandlerCollection.ValidateToken(SecurityToken taken) +412 TokenRecerver.AuthenticateToken(SecurityToken taken, Boolean ensureDeareTiken, String endpointUri) +151 MSFederationAuthenticateToken(SecurityToken taken, Boolean ensureDeareTiken, String endpointUri) +151 MSFederationAuthenticationHood Le.OnAuthenticateDeaper(MtpRequest) +405 MSFederationAuthenticationHood Le.OnAuthenticateDeapert(DeapertLender, EventArgs args) +521 mStep.System.Neb.HttpApplication.ExecutionStep.Execute() +80 AucustStep(ElevertionStep step, Booleand completedDouchronousTv) +270
Version Information: Newsolt NET Fr	when an Version 4.0.30319. ASP NET Version 4.0.30219.237

# 5. Windows 12 WIF Framework installation (WindowsIdentityFoundation)

Windows Identity Foundation is included with the operating system (Windows Server 2012 R2, Windows Server 2012 and Windows 8.1) as a feature in turning Windows features on or off.

If you didn't previously install WIF, then you should follow these steps:

**Step 1**: Start by running the **Server Manager**, if it is not already open, by either of these two options:

Step 2: On the Windows taskbar, click the Server Manager button.

**Step 3**: On the Start screen, click the Server Manager button.



**Step 4**: Under the Manage menu, select Add Roles and Features (or press Add roles and features under the Dashboard panel).

Step 5: On the Before You Begin screen, click Next.

**Step 6**: On the Installation Type screen, select Role-based or Feature-based Installation and click **Next**.

**Step 7**: On the Server Selection screen, select the appropriate server, leave the default options, and click **Next**.

Step 8: On the Server Roles screen, click Next.

**Step 9**: On the Features screen, select **Windows Identity Foundation 3.5** and click **Next**.

Select features		DESTINATION SERVER CRM.cmittert.loca
Before You Begin Installation Type	Select one or more features to install on the selected server. Features	Description
Server Selection Server Roles Features Confirmation Results	Vier Interfaces and Infrastructure (Installed)      Windows Biometric Framework      Windows Feedback Forwarder      Windows Istentity Foundation 3.5 (Installed)      Windows Internal Database      Windows PowerShell (2 of 5 installed)      Windows Server Sativation Service (2 of 3 installe      Windows Server Backup      Windows Server Backup      Windows Standards-Based Storage Management      Windows M	Windows Identity Foundation (WIF) 3.5 is a set of .NET Framework classes that can be used for implementing claims-based identity in your .NET 3.5 and 4.0 application WIF 3.5 has been supersided by WI classes that are provided as part of .NET 4.5. It is recommended that you use .NET 4.5 for supporting claims-based identity in your applications.
	( III )	

Figure 29: Windows features - WindowsIdentifyFoundation 3.5

**Step 10**: On the confirmation screen, select **Restart the destination server automatically if required** and click **Install**:



<b>B</b>	Add Roles and Features Wizard
Confirm installation	on selections
Before You Begin	To install the following roles, role services, or features on selected server, click Install.
Installation Type	Restart the destination server automatically if required
Server Selection Server Roles	Optional features (such as administration tools) might be displayed on this page because they have been selected automatically. If you do not want to install these optional features, click Previous to clear their check boxes.
Features Confirmation	Windows Identity Foundation 3.5
Results	
	Export configuration settings Specify an alternate source path
	< Previous Next > Install Cancel

Figure 30: Confirm installation selection

**Step 11**: When the installation is completed, the wizard reflects the installation status on the Results screen

Step 12: Click Close to exit the wizard.



### 6. DocumentsCorePack Templates

DocumentsCorePack templates are predefined Word templates that have some DocumentsCorePack merge fields in it. You can define several templates for each Microsoft Dynamics 365 entity (For example: account, contact, etc.).

Example: You created an "Account reconnect" template that should be used to send information to accounts. Once created and stored, every Microsoft Dynamics 365 user can generate "Account reconnect" letters based on this template.

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

#### 6.1. How to create DocumentsCorePack templates

Please read the corresponding <u>User Guide</u> (chapter 5.1 How to create DocumentsCorePack templates) for more information about the creation of DocumentsCorePack templates.

#### 6.2. Import/export existing DocumentsCorePack templates

Open your DocumentsCorePack Server Configuration and choose the organization for which you want to import/export the Templates and click on the **OK** button.



To open the **Organization overview** again, after closing, search in the Windows Start pane **Configuration – DocumentsCorePack for Dynamics 365**.



onliguration or	license manageme	m					
				Available Org	1		~
Friendly name CRM168820	Unique n unqfe9a3		Installation State DocumentsCorePac	k is INSTALLED	BuildNr. 2020.136	DocumentsCorePack by mscrm-addons.com 2020.136	2020.2
<							>
		Uninstall	Get IFD Setup			(1)	ose
Reinstall/Upgrade	LicenseManager	Uninstall	Get IPD Setup	Configurations -		G	050
Reinstall/Upgrade	License Manager	Uninstall	Get IFD Setup	Client & S	nt & Serve	ased generation settings er Based document generation settings	Lau

Figure 31: Click in the Organization overview Client & Server Based setting

This action will open the DocumentsCorePack Client Configuration. Select the General Settings.



Import DCP Template	Export All Templates
Language	en 🗸
Debug	
Datasource:	user-dependent $\checkmark$
Names to cut	parent customerid-pc1, parent account id- pa1, nation name id-nn1
Replace Special Characters	 – -,   :1
Additional Entities	pricelevel, territory
Entities don't show	invoicedetail, quotedetail, opportunity product
Unavailable Entities	accountleads, annualfis calcalendar, ap plication file, as yncoperation, attachme
Folder Displayattribute	
Here you can define the a entity which should be us foldername (affects both, File Explorer). You could ig setting when you don't s documents in one of this default the "name" attribu	sed for the SharePoint and gnore this ave your locations. Per
Metadata Cache (Not create	d) : Create
Server Base	ed Document Generation Settings

Figure 32: General Settings

From here you have the option to import and/or export templates. By clicking the [**Import DCP Templates**] button or the [**Export All Templates**] button, the Template Import Manager opens. It allows you to either import, export or transfer your DocumentsCorePack templates.



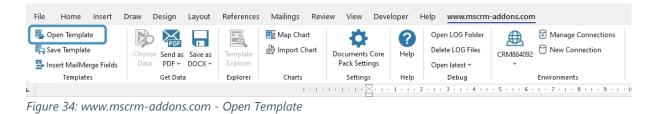
ommandBar	General Settings SharePoint Advanced	
	Import DCP Templates	Export All Templates
	DocumentsCorePack Template	Manager ow options, to either import, export
	Impo	ort from File
	Exp	port to Zip
	Transfer	to Organization
	Settings	2020.136
	Metadata Cache (Not created) :	Create
	Server Based Docu	ument Generation Settings

Figure 33: the template import manager



For more information about how the Template Import Manager works, please have a look at the <u>corresponding documentation</u> (Chapter 5 DCP Template Import Manager).

Now the templates are imported/exported in MS Word and ready to use. Next, go to the **www.mscrm-addons.com** to open the DocumentsCorePack Template Designer and click **Open Template**.



## 7. Language Settings for DocumentsCorePack

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

#### 7.1. Language Settings on the Client

This chapter outlines how to modify the language settings on the Client.

#### 7.1.1. Location of the Language Settings in 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 Dynamics 365\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.

**Please note**: These language files can only be used if the set language is the same as the user language of your Dynamics 365 system.



#### 7.1.2. Modify the UI on the Client

The UI language is determined during 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\**
- 4. DocumentsCorePackClient2018.
- 5. Change the value of the **language** setting to another language.
- 6. Close the registry editor.

**Please note**: To use a language other 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 must open the registry and change the value of the **language** setting to **nl**.



#### 7.1.3. 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.

#### 7.2. Language Settings on Server

This chapter outlines how to modify the language settings on the Server.

#### 7.2.1. Location of the Language Settings on the Server

The UI of the 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 the DocumentsCorePack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Server for Dynamics365\Localization".

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

**Please note**: The language XML files from the server and client component are different. If you want to translate DocumentsCorePack, you must translate both files, the language file on the client and on the server.

**Please note**: To use a language other than English, you must 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.

#### 7.2.2. Location of the Language Settings on the Server

The UI of the 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 the DocumentsCorePack installation folder, typically under C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Server for Dynamics365\Localization.

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

**Please note**: The language XML files from the server and client component are different. If you want to translate DocumentsCorePack, you must translate both files, the language file on the client and on the server.

**Please note**: To use a language other than English, you must 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.

#### 7.2.3. 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.

### 8. Important information

If you change the NamesToCut KEY, 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

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 must edit them! (One way to do so is by using the Replace



function of Word). Sometimes it will be better 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 must add every field to the settings.

## 9. Uninstall DocumentsCorePack Server Component

To uninstall the DocumentsCorePack Server for Microsoft Dynamics 365, select **Programs and Features** in the Control Panel.

Search for the DocumentsCorePack Server for Dynamics 365 and with a right-click you can **Uninstall** DocumentsCorePack Server.

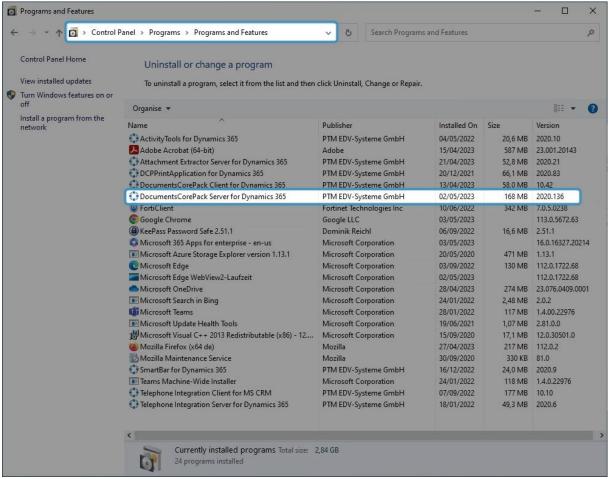


Figure 35: Uninstall DCP Server for Dynamics 365



#### Confirm your choice.





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## **11. Contact**

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



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