

# DocumentsCorePack Server Installation Guide for Microsoft 2015/2016 and Dynamics 365

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

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## Preamble

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

Depending on the license bought, the Server Based and Client Based Document Generation provides you with a set of tools to create and process documents inside Dynamics 365 with a few clicks.

Before installing DocumentsCorePack Server and/or Client Based Document Generation for Dynamics 365, please read this document carefully and follow the steps as described to achieve the results.

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

For detailed information about the different features and settings of DocumentsCorePack Server- and/or Client Based Document Generation, please <u>click here</u>.

## **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 Server for Microsoft Dynamics 365
- Configuring DocumentsCorePack Server 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
- Windows Server 2012 32/64 bit
- Windows Server 2016
- Windows Server 2019

## 1 How to install DocumentsCorePack Server?

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

**Attention:** After the setup is completed, you could start the DocumentsCorePack Server Configuration in the Windows Start-menu to install and configure the DocumentsCorePack Server in other Dynamics 365 organizations.

## 2 Installation DocumentsCorePack Server

This chapter explains how to install the Server component. Important is to be sure that the machine is online to the Dynamics 365 server.

### 2.1 Online Service Configuration

The web-based setup allows users to configure DocumentsCorePack ServerBased 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 for OnPremise installations please read CHAPTER 2.5 SERVICE CONFIGURATION ON PAGE 23.

Also, follow the links below for more information:

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

### 2.2 Installation

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

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



Figure 1: Installer DCP Server for Dynamics 365

### 2.2.1 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 Server for Dynamics 365	x
License Agreement Please read the following license agreement carefully.	5.COM namics 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 AN	D ID V
I accept the terms in the license agreement     I do not accept the terms in the license agreement	It
<pre>can statistication </pre>	cel

Figure 2: End User License Agreement (EULA)



### 2.2.2 Confirm the installation

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

DocumentsCorePack Server for Dynamics 365
Ready to Install the Program The wizard is ready to begin installation.
Click Install to begin the installation. If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
InstallShield 2 k 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. Click **[Change]** to specify a different installation path. Click **[Next]** to proceed.

闄	J DocumentsCorePack Server for Dynamics 365						
<b>Destinat</b> Click Ne Change	tion Folder ext to install to this folder, or click to install 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	< <u>B</u> ack <u>Next</u> Cancel						

Figure 4: Change installation folder

While the installation is running, the window below appears. This may take several minutes.

DocumentsCorePack Server Installation Guide



岁 D	OocumentsCorePack Server for Dynamics 365						
Installing DocumentsCorePack The program features you selected are being installed.							
P	Please wait while the InstallShield Wizard installs DocumentsCorePack Server for Dynamics 365. This may take several minutes.						
	Status:						
	Validating install						
InstallShield -	InstallShield						
	< Back Next > Cancel						
igure 5: Installation Status							

### 2.2.3 Install 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.



Figure 6: Install Windows Identify Foundation



### 2.2.4 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 *[OKI*-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							
							Existing Profiles
- Select your Dynam	nics 365 Type						
OnPremise	2 0 1	FD/Hosted O Online					
Dynamics 365 Serv	ver-Url:						
http://crm.crmt	est.local:5555	3					
Authenticated as:	dontialstt	d1-1-1-1					
Username admir	nistrator 4 D	Oomain crmtest.local Password					
		Retrieve all 5					
Organization info	rmation:						
Friendly name	Unique name	ServiceURL					
Standard         Standard         Standard           Image: crm2016         crm2016         crm2016							
6 OK Cancel							

Figure 7: Dynamics 365 Connection setup

For DocumentsCorePack, the IFD setup is only required when using SharePoint Folder and Sites Integration. You have to install IFD before you can use it. You can find the IFD wizard <u>here</u>.

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

波 D	ocumentsCorePack Server for Dynamics 365
Installing The prog installed.	pocumentsCorePack gram features you selected are being DocumentsCorePack for Dynamics 365
P	Please wait while the InstallShield Wizard installs DocumentsCorePack Server for Dynamics 365. This may take several minutes.
	Status:
TestallChield	
InstallShield -	< Back Next > Cancel

Figure 8: Installation Status



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



If an old DocumentsCorePack version is detected while installation, you will be prompting to uninstall.

### 2.2.5 Security Roles

#### General security roles for all products:

The following security role is required by all our products:

• MSCRM-Addons General Security Role

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

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

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

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



Figure 10: Security Roles

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

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



If SharePoint is already configured in your Dynamics 365-systme, following window appears.



Figure 11: DCP Server Setup - Prerequisites

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

Click [No] to skip this step.

Please read CHAPTER 2.4.3 THE SHAREPOINT-TAB ON PAGE 22 for detailed information on how to configure your SharePoint.

#### 2.2.6 Finish the installation

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

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



Figure 12: Finish installation



### 2.3 Organization overview

After finishing the configuration, the *Organization overview*-window opens. With a click on the configuration, you get the possibility to edit the service.

Į	View Organization Installation States - DocumentsCorePack 2017.169							
	Organization overview Please select an organization in the list to access organization specific functionalities, like configuration or license management						addons.com rePack for Dynamics 365	
						Available Organizations:	~	
	Friendly name Standard	Unique name Standard	Installation Documents	State CorePack is INSTALLED	BuildNr. 2017.169	AutoMergeGlobalButton 2017.39	DocumentsCorePack by ms 2017.169	
	< III >							
	Get IFD Setup							

Figure 13: Organization overview

If you close the Organization overview, you have also the possibility to open this window via the Windows Start Pane. Therefore, please search for "Configuration – DocumentsCorePack for Dynamics 365".



Figure 14: Start Pane – Configuration DocumentsCorePack

This action will open the Dynamics 365 Connection setup. Please proceed like in CHAPTER 2.2.4 CONFIGURE DYNAMICS 365 SERVER ON PAGE 9. to open the Organization overview-window again.



By choosing an organisation in the Organization overview-window, the several function-buttons will be visible at the window-bottom.

View Organization Installation States - DocumentsCorePack 2017.169						
Organization of Please select an org configuration or lice	OVERVIEW anization in the list to acces ense management	s organization specific functionalities, like		DocumentsCo	addons.com rePack for Dynamics 365	
				Available Organizations:	~	
Friendly name	Unique name	Installation State	BuildNr.	AutoMergeGlobalButton	DocumentsCorePack by ms	
Standard Standard	Standard	DocumentsCorePack is INSTALLED	2017.169	2017.39	2017.169	
					>	
		4 5				
Reinstall/Upgrade L	icenseManager Uninstall	Get IFD Setup Configurations 🗸			Close	

Figure 15: Organization overview function buttons

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

### 2.3.1 Reinstall/Upgrade

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

### 2.3.2 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).



	License Ma	nager	_	n x	
License Manager Select a product from the list on the left or install/update a license	side to view it's licensing (	details	mscrm-addons.cc DocumentsCorePack for Dynamic	om 5 365	
Installed Products Current system information - Standard@http://crm.crmtest.local:5555 @					
ActivityTools	Your license is Valid				
	General license inform	nation (CRM 8.2.2.112)			
AttachmentExtractor		LicenseValue	Systemvalue	Status	
	Licensemodel	perSite		0	
Client	Licensekey	4cNf5FXDCFRL8IKUFc/OzmN	Licensekey installed	0	
Chent	BusinessUnit	Standard	Standard		
DocumentsCorePack	Number of site licenses	85	7		
Server Based Generation	Licenses for Readonly Users	0	0		
GroupCalendar	Expiration	18.01.2019 00:00:00	2 days left		
	Support	18.01.2019 00:00:00	2 days left	*	
PowerSearch	Issued product	DocumentsCorePack Server	DocumentsCorePack Server Base	*	
- Tomelsearen	Version upgrade covered	18.01.2019 00:00:00	06.12.2018 14:50:16	*	
🗊 SmartBar	License Status				
	LicenseState		valid		
C TelephoneIntegration					
	Select license file:			÷	
			Cl	ose	

Figure 16: The local License Manager

### 2.3.3 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 17: The Uninstall-window

### 2.3.4 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.

### 2.3.5 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.





### 2.4 Client & Server Based generation settings

Hit the **[Launch]**-button to open the settings for Client and / or Server Based Document Generation. The so opened window provides you with a few tabs, that help you configure your Client and ServerBased generation settings. Here users can configure on which entities the Server and/or Client Based Button should appear and rename the button label. (E.g. configure on which entities you want to see the "Export"-Button etc.).

### 2.4.1 The CommandBar-tab

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

DocumentsCorePack Server Config v2017.166 // crm2016 @ http://crm.crmtest.local: 🗕 🗖 🗙							
CommandBar General Settings SharePoint Advanced							
Use these options to configure commandbar button visibility and formatting for the Server Based and							
Client Based Document Gene	Client Based Document Generation						
- Client Based Document Button label Export To Word	Generation Details	eration 1 Server Based Document Generation 2 Details Button label Create Document Details					
Advanced Puttern	Configuration						
Advanced Button		-					
Advanced remplate	Group Filtering						
<ul> <li>CommandBar Configuration</li> </ul>							
Entity Name	<b>^</b>	Have Client Based Button <ul> <li>(select all)</li> </ul>	Hav : Server Based Button (select all)				
Account		✓	✓				
Action Call		✓					
Action Call Workflow							
Address		✓					
Agent Script Answer							
Agent Script Task		3					
Agent Script Task Category							
angebot		✓					
Appointment		$\checkmark$					
Article		✓					
AssureSign Communication Pro	ĸy	✓					
AssureSign Configuration		✓					
AssureSign Document		$\checkmark$					
AssureSign Template Map							
			OK Cancel				
ïgure 19: CommandBar-tab	gure 19: CommandBar-tab CommandBar Configuration						
Client Based Doci	ument Generation	Server Ba	sed Document Generation				



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

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

as well as the display name of these buttons.

#### 1 CLIENT BASED DOCUMENT GENERATION

This section contains all settings for Client Based Document Generation.

۲C	Client Based Document Generation				
	Button label Export To Word Details				
	Advanced Button Configuration				
	Advanced Template Group Filtering				

Figure 20: Client Based Document Generation

#### **Button label**

"Export to Word" - here users can define a different name for the DocumentsCorePack Client Based button label. With a click on the **[Details]**-button, the following window appears:

	Edit Ribbon & Navigationbar ressources				
Welcome to the Ribbon & Navigationbar Ressource editor This editor allows you to modify the default ribbon and navigation bar icons and labels supplied by DocumentsCorePack server. Please note that image resources must be available as webresources in CRM to be able to use. Use the refresh button on each control to reload the list of available resources					
Icons Labels					
Ribbonlcons					
16x16 🔯	MSCRM-ADDONS.com ptm_dcp_icon_exportword16x16 V				
	Close				

*Figure 21: The Ribbon & Navigationbar Ressource editor – Icons* 

This editor allows users to modify the default ribbon and navigation bar icons and labels supplied by DocumentsCorePack server. Please note, that image resources must be available as web resources in Dynamics 365 to be able to use. Use the refresh button on each control to reload the list of available resources.

<u>Icons</u>: The *Icons*-tab of this configuration window gives you the possibility to change the icons of the buttons. The icons are Dynamics 365 web resource you can upload some by yourself with the standard Dynamics 365 functionality.



			Edit Ribbon & Navigationbar ressources	
Welc This ed Docum to use.	ditor allow nentsCore . Use the	o the Ribbon vs you to modify t Pack server. Pleas refresh button on	& 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 ab each control to reload the list of available resources	le
lcons	Labels			
			Create Document - SubGrid	^
	LCID	Language	Label	
•	1033	English (United	Export To Word	
	1031	German (Germa	Export To Word	
				=
			Create Document - Grid	
	LCID	Language	Label	
•	1033	English (United	Export To Word	
	1031	German (Germa	Export To Word	
			Create Document Form	
	LCID	Innaunan	Label	
Þ	1033	English (United	Expert To Word	
	1031	German (Germa	Export To Word	
			Create Document - SubGrid in Outlook	
	1 cm	· ·	a a a a a a a a a a a a a a a a a a a	~
			Close	

Figure 22: The Ribbon & Navigationbar Ressource editor – Labels

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

#### **Advanced Button Configuration**

When clicking on this button, the Advanced Button Configuration-dialog appears. In this dialog, you can select the entity that you want to manage. E.g. Already existing custom *[Print in Word]*-buttons will be listed and can be deleted.

Figure 23: The Advanced Button Configuration

The *Add*-functionality gives you the possibility to define a *custom name* for your button and you can select the JavaScript function that should be executed if you hit the generated button.

	Edit Button
Button Name	
JS Library	ptm_dcp_custombuttonactions.js
JS Function	×
	Cancel OK
	Cancel OK

Figure 24: The Add-functionality

More information about the Advanced Button Configuration can be found in the corresponding <u>blog</u> <u>article.</u>



### **Advanced Template Group Filtering**

This feature offers the possibility to set a filter for DocumentsCorePack templates. For detailed information, please read our <u>blog article</u>.

Advanced	l template filtering	_		2
Velcome to the advanced group filtering /ith this form, you can link attributes of specifif	<b>g for templates</b> c entities to the group field of the DCP te	mplate	es en	tity
lick here for Blog article				
Entityname	Template Group Filter Field		^	
Window Navigation Rule	(no selection)	~		
User Setting	(no selection)		=	
User	(no selection)			
Unit Group	(no selection)	~		
Unit	(no selection)	~		
UII Workflow-Step Mapping	(no selection)	~		
UII Workflow Step	(no selection)	~		
UII Workflow	(no selection)	~		
UII Session Transfer	(no selection)	~		
UII Saved Session	(no selection)	~		
Ull Non-Hosted Application	(no selection)	~		
UII Context	(no selection)	~		
UII Audit	(no selection)	~		
Ull Action	(no selection)	~		
Translation Process	(no selection)	~		
Trace Source Setting	(no selection)	~		
Toolbar Button	(no selection)	~		
Toolbar	(no selection)	~	$\sim$	
L				
	UK		Can	Cel

Figure 25: The Advanced template filtering

By saving the changes, following window appears:



Figure 26: Saving the settings

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



#### **2** Server Based Document Generation

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

Server Based Document Generation (Trial) –					
Button label	Create Document	Details			

Figure 27: Server Based Document Generation

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

For detailed information about licensing, please read CHAPTER 2.6 LICENSING ON PAGE 29.

### **3** COMMANDBAR CONFIGURATION

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

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

Entity Name	-	Have Client Base (select all)	ed Button	Have Server <ul> <li>Gelect a</li> </ul>	Based Button II)
Account		✓			✓
Address		✓			✓
Appointment		✓			✓
Article		✓			✓
Attachment		✓			✓
Auto Numbering Definition		✓			✓
Auto Numbering Request		✓			✓
Bing Map Lookup		✓			✓
Bool Parse Request		✓			✓
Campaign		✓			✓
Campaign Activity		✓			✓
Campaign Response		✓			✓
Case		~			✓
Competitor		~			✓

Figure 28: CommandBar Configuration

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



### 2.4.2 The General Settings-tab

In this tab you have the possibility to set up the general settings of your service and to import or export templates, as you can see in the figure below.

DocumentsCorePack Server Config v2017.	166 // crm2016 @ http://crm.crmtest.local: 🗕 🗖 🗙		
CommandBar General Settings SharePoint Adv	anced		
Import DCP Templates	✓ Export All Templates		
Language	en 🗸		
Debug			
Datasource:	user-dependent 🗸		
Names to cut	parentcustomerid-pc1,parentaccountid-		
	pa1, nationnameid-nn1		
Replace Special Characters			
	,d#x2015;[-,d#x0004;]		
Additional Entities	pricelevel,territory		
Entities don't show	invoicedetail		
Unavailable Entities	accountleads,activityparty,annualfiscal		
Folder Displayattribute			
Here you can define the attribute for each entity which should be used for the foldername (affects both, SharePoint and File Explorer). You could ignore this setting when you don't save your documents in one of this locations. Per default the "name" attribute is used.			
Metadata Cache (Not created	d) : Create		
Server Base	d Document Generation Settings		
	OK Cancel		

Figure 29: The General Settings-tab

#### **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.

#### 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.

#### DEBUG

Please leave this option unchecked: It is used by our support to simplify bug fixing.

#### 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.

#### NAMES TO CUT

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



#### REPLACE SPECIAL CHARACTERS

Treats special exceptions or certain coding problems with Dynamics 365.

#### **ADDITIONAL ENTITIES**

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

#### ENTITIES DON'T SHOW

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

#### UNAVAILABLE ENTITIES

Entities which are not included in the metadata cache.

#### FOLDER DISPLAYATTRIBUTE

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

#### 11. 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. **Note:** once created this functionality needs to be updated manually!

#### 12. Server Based Document Generation Settings

With a click on this button, users will get to the "AutoMerge Config" in 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.



### 2.4.3 The SharePoint-tab

Here, you have the possibility 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 also in MS CRM 2015. The DocumentsCorePack Client supports both SharePoint Integrations.

DocumentsCorePack Server Config v201	7.166 // crm2016 @ http://crm.crmtest.local: 🗕 🗖 🗙
CommandBar General Settings SharePoint A	dvanced
	N-1-4
Save Documents in Share	~oint
CRM Integrated	Save in Folders 🔘 Save in Sites
SharePoint Server	0
Use HTTPS	Configure Certificate
Root Site	
Template	> Ø
Document Library Name	
Entity Specific Sites	Configure
Entity Relation Sites	Configure
Entity Site Name	Configure
Use Unique Permissions	
- Activity Settings	
Here you can configure where you want to see the	Configure Entities
created documents for an entity	Use other aspx-site
SharePoint Documents NavB	ar Name SharePoint Documents
	OK Cancel

Figure 30: The SharePoint-tab

You can decide between three SharePoint integration options:

#### **CRM Integrated**

You have to configure the SharePoint integration within Dynamics 365 to use this integration. When enabled, the documents generated via the DocumentsCorePack Client will be saved in the Dynamics 365 specified SharePoint location for each record.



### 2.5 Service Configuration

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



Another way to get to the Service Configuration is to open the **"ServiceManagement – DocumentsCorePack for Dynamics 365"** in the Start pane. This will open the Organization overview. There, click on the required organization, navigate to the Configurations-dropdown button, choose **Service Configuration** and hit the **[Launch]**-button. See next screenshot:

In the so opened Service Overview-window you have the possibility to Add a New service and lists of your Active Services and Inactive Services.

C)	DocumentsCorePack Server - Management (v. 2017.166)	
Welcome to the DocumentsCore This tool will help you create and manage yo	ePack Service Overview	DocumentsCorePack for Dynamics 365
Add New Service          New service setup         Active Services         Standard         Inactive Services         mscrm-addons2	General         ServiceName         (Once set, the servicename cannot be changed again)         - Service Logon - [ ConnectionSetup / PrinterConfigurations ] <ul> <li>local system account</li> <li>custom account</li> <li>Service User:</li> <li>Password:</li> </ul> Validation	yste
<ul> <li>crm2016</li> <li>crm.test.local_mw</li> <li>CRM.test.local-No-LB</li> <li>crm.test.local-12</li> <li>crm.test.local-11</li> <li>crm.test.local-10</li> <li>crm.test.local</li> <li>empty</li> <li>crm.test.local-print</li> </ul>	General          Logfile Path:          Other:       Activate Debugging         Batch Size:       25         Satch Aelay:       90         Idle loop time in seconds         Category:       0         Which type of jobs should this service work on?         Idle loop time         Idle loop time         Only print jobs         Filter:         Only document generation jobs         Always restart service on failure	
global: HeartBeatService is fine	Stop Service Delete	Save service configuration Close

*Figure 32: The local DCP Service Overview* 



### 2.5.1 The General-tab

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

Ø9	De	ocumentsCorePack Server - Management (v. 2017.169)	_ <b>D</b> X			
Wel This t	Welcome to the DocumentsCorePack Service Overview This tool will help you create and manage your merge services					
Add S Activ Inact	New Service New service setup ve Services tive Services Standard	General       Dynamics 365 Connection Setup       License       Log       Printer         ServiceName       ServiceName:       Standard       (Once set, the servicename cannot be changed again)         Service Logon - [ ConnectionSetup / PrinterConfigurations ]       Image: Content of the service User:       Image: Content of the service User:	Verify			
ڻ ف	mscrm-addons2 crm2016	Password: General	Ī			
\$ \$ \$ \$ \$ \$ \$	crm.test.local-mw CRM.test.local-No-LB crm.test.local-12 crm.test.local-11	Logfile Path:         Other:       Activate Debugging         Batch Size:       25 ^         Count of service runs, before entering idle loop to limit         Batch delay:       10 ^         Categony:       0 ^	CPU load			
\$ \$ \$ \$ \$	crm.test.local-10 crm.test.local empty crm.test.local-print	Which type of jobs should this service work on? <ul> <li>both</li> <li>only print jobs</li> <li>Filter:</li> <li>only document generation jobs</li> </ul> Always restart service on failure         Stop Service       Start Service       Delete       Save service	e configuration			
global:	HeartBeatService is fine		Close			

Figure 33: The General-tab



### 2.5.2 The Dynamics 365 Connection Setup-tab

Again, you have to specify your Dynamics 365-connection in the Dynamics 365 Connection Setup. Click on the **[Save service configuration]**-button to continue.

<b>0</b> 9	Docume	ntsCorePack Se	rver - Manageme	nt (v. 2017.169)		- 🗆 X
Welcome to the Do This tool will help you crea	cumentsCorePack te and manage your merg	Service Ove le services	rview		DocumentsCorePack for	ONS.COM or Dynamics 365
Add New Service	Gener	al Dynamics 365 C	Connection Setup Lie	ense Log Printer		
🖏 New service setur	Sele	ct your Dynamics 36	5 Type		-	
New Service Setup	۲	OnPremise	() IFD	/Hosted	Online	
Active Services	- Dyna	amics 365 Server-Ur	:			
Inactive Services	htt	p://crm:5555				🕊 🔢
🙆 Standard	Auth	enticated as:				
<b>io</b> mscrm_addons2	U 🗆	se default Credentia	als crmtest0\adminis	trator		
crm2016	Use	rname administrat	or Dor	nain crmtest0	Password •••••	•••
🔅 crm.test.local_mw			[	Retrieve all		
🙆 CRM.test.local-No-L	B	nization informatio	on:			
crm.test.local-12	Frie	ndly name tandard	Unique name Standard	ServiceURL Standard		
	2 <b>2</b> c	rm2016	crm2016	crm2016		
🕸 crm.test.local-11						
🙆 crm.test.local-10						
🙆 crm.test.local						
o empty						
🔹 crm.test.local-print					ОК	Cancel
	А	dvanced Options				
	Sto	p Service Start	Service Delete		Save servic	e configuration
global: HeartBeatService is fine						Close:

Figure 34: The Dynamics 365 Connection Setup-tab



### 2.5.3 The License-tab

In the *License*-tab, you are able to see the information about your license. In this case our license has expired. You have to update it.

<b>(</b> )	Do	ocumentsCorePack Serve	er - Management (v. 201	7.169)	D X
Wel This t	come to the DocumentsCore ool will help you create and manage you	Pack Service Overv ur merge services	iew	DocumentsCorePack for Dynam	COM mics 365
Add	New Service	General Dynamics 365 Con	nection Setup License Log	Printer	
<b>\$</b> 3	New service setup	License has expired!			
Activ	ve Services	General license inform	nation (CRM 8.2.2.112)		
Inact	tive Services		Licensevalue	Systemvalue	Status
		Licensemodel	perSite		0
Ø	Standard	Licensekey	4cNf5FXDCFRL8IKUFc/OzmN	Licensekey installed	0
ø	mscrm-addons2	BusinessUnit	Standard	Standard	<b>*</b>
态	crm2016	Number of site licenses	85	7	
nër.	G1112010	Licenses for Readonly Users	0	0	
Ø	crm.test.local_mw	Expiration	18.01.2019 00:00:00	-3 days left	
۲	CRM.test.local-No-LB	Support	DocumentsCorePack Server	-5 days left	
-		Version upgrade covered	18.01.2019 00:00:00	06.12.2018 14:49:32	
-Q:	crm.test.local-12	Liconco Status			· · · ·
ø	crm.test.local-11				
ø	crm.test.local-10	LicenseState		invalid	-
ø	crm.test.local				
٢	empty				
٢	crm.test.local-print				
		Stop Service Start Ser	vice Delete Licer	Save service config	uration
global	HeartBeatService is fine				Close:

Figure 35: The License-tab



## 2.5.4 The Log-tab

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

<b>(</b> )		DocumentsCorePack Server - Management (v. 2017.169)	_ 🗆 X
Wel This t	Icome to the DocumentsCo tool will help you create and manage	e your merge services	D-addons.com CorePack for Dynamics 365
Add	New Service	General Dynamics 365 Connection Setup License Log Printer	
<b>5</b> 3	New service setup	Message	TimeStamp
Activ	io Sonicos	Standard has failed to start Product is not licensed	18.01.2019 21:13:19
Activ	ve services	AutoMergeService has shutdown all subprocesses	18.01.2019 21:13:19
Inact	tive Services	AutoMergeService has requested a shutdown, service is stopping running b	18.01.2019 21:13:19
-		Standard: Duplicate settings detected on organization Standard@http://cr	18.01.2019 21:13:19
0	Standard	Standard bapticate settings acceled on organization standard wheep,//en      Standard has failed to start Product is not licensed	18.01.2019 20:28:19
6	mscrm-addons2	AutoMergeService has shutdown all subprocesses	18.01.2019 20:28:19
	1130111-8000132	AutoMergeService has requested a shutdown, service is stopping running b	18.01.2019 20:28:19
ø	crm2016	U Standard is not licensed	18.01.2019 20:28:19
		Standard: Duplicate settings detected on organization Standard@http://cr	18.01.2019 20:28:18
©.	crm.test.local_mw	AutoMergeService has shutdown all subprocesses	18.01.2019 19:43:19
<i>i</i> n.	CPM test local No. LR	AutoMergeService has requested a shutdown, service is stopping running b	18.01.2019 19:43:19
197	CRIVI.test.iocal-NO-LB	Standard is not licensed	18.01.2019 19:43:19
Ø	crm.test.local-12	A Standard: Duplicate settings detected on organization Standard@http://cr	18.01.2019 19:43:18
		(i) Standard has failed to start Product is not licensed	18.01.2019 18:58:19
Ø	crm.test.local-11	AutoMergeService has shutdown all subprocesses     AutoMergeService has requested a chutdown, service is stopping supping b	18.01.2019 18:58:19
		Standard is not licensed	18.01.2019 18:58:19
101	crm.test.local-10	A Standard: Duplicate settings detected on organization Standard@http://cr	18.01.2019 18:58:17
6	crm test local	Standard has failed to start Product is not licensed	18.01.2019 18:13:19
~	ennicebaloear	AutoMergeService has shutdown all subprocesses	18.01.2019 18:13:19
Ø	empty	(i) AutoMergeService has requested a shutdown, service is stopping running b	18.01.2019 18:13:19
		Standard is not licensed	18.01.2019 18:13:19
Ø	crm.test.local-print	Standard has failed to start Product is not licensed	18.01.2019 17:28:19
		AutoMergeService has shutdown all subprocesses	18.01.2019 17:28:19 🗸
		< <u> </u>	>
		Stop Service Start Service Delete	Save service configuration
global	: HeartBeatService is fine		Close:

Figure 36: The Log-tab



### 2.5.5 The Printer-tab

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

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

De De	ocumentsCorePack Server - Management (v. 2017.169)	_ 🗆 🗙
Welcome to the DocumentsCore This tool will help you create and manage yo	Pack Service Overview ur merge services	addons.com ePack for Dynamics 365
Add New Service	General Dynamics 365 Connection Setup License Log Printer	
🔯 New service setup	Saved PrinterConfigurations	- Manage
Active Services	ConfigurationName	New
Inactive Services		Edit
🕼 Standard		Сору
🕸 mscrm-addons2		
🕸 crm2016		
😨 crm.test.local_mw		
CRM.test.local-No-LB		
😨 crm.test.local-12		
😨 crm.test.local-11		
🙆 crm.test.local-10		
🙆 crm.test.local		
🙆 empty		
😨 crm.test.local-print		
		🙅 Delete
	Stop Service Start Service Delete Sa	ve service configuration
global: HeartBeatService is fine		Close .::

Figure 37: The Printer-tab



### 2.6 Licensing

Depending on your needs we offer Server- and/or Client-licenses. Please also have a look at the corresponding blog article <u>Licensing Guide for Dynamics 365</u>.

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

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

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

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



### 2.6.1 License for Client Based Document Generation

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

- Normal license: Requires as many licenses as there are active users in Dynamics 365.
- **Per User license:** If you do not want to purchase a license for all your users you should take the per user model. The limitation you have with this model is that you have to purchase initially at least 10 licenses.

License Info: shows details about the license (validity, type, users) and some facts about the currently used license.

<b>1</b> 20	License Manage	r	_	o x
License Manager Select a product from the list on the left sid licensing details or install/update a license	de to view it's	Documents	- <b>addons.c</b> ( CorePack for Dynamic	om 5 365
Installed Products	Current system inform	mation - Standard@http	://crm:5555	Ð
ActivityTools	Your license is Valid			
	General license inform	nation (CRM 8.2.2.112)		
AttachmentExtractor		LicenseValue	Systemvalue	Status
	Licensemodel	perSite		0
Client	Licensekey	Xj+uuMMHdxU5TNzdx6/ea	Licensekey installed	0
	BusinessUnit	Standard	Standard	<b>*</b>
Server Based Generation	Number of site licenses	50	7	<b>*</b>
	Licenses for Readonly Users	0	0	*
(iii) GroupCalendar	Expiration	13.05.2019 00:00:00	112 days left	<b>*</b>
	Support	13.05.2019 00:00:00	112 days left	<b>*</b>
🛞 PowerSearch	Issued product	DocumentsCorePack	DocumentsCorePack	<b>*</b>
	Version upgrade covered	13.05.2019 00:00:00	06.12.2018 14:45:34	<b>*</b>
SmartBar	License Status			
	LicenseState		valid	<b>*</b>
TelephoneIntegration	Select license file:			÷
			Cl	ose

Figure 38: License Manager



If the license isn't installed or if Trial version has been expired, you have to upload the required license text file, sent by our support team with a click on the folder symbol as you can see in the figure below.

<b>Ø</b> 8	Open license file			×
🔄 😔 🔻 🚺 🕨 L	icenses	~ C	Search Licenses	م
Organize 👻 New fold	ler			
☆ Favorites	Name	Date modified	Туре	Size
Desktop	PTMEDVSystemeGmbH_AttachmentExtractor	17.12.2014 12:45	Text Document	1 KE
📜 Downloads 🗏	PTMEDVSystemeGmbH_DocumentsCorePackClientBased_key	17.12.2014 12:40	Text Document	1 KE
📃 Recent places	PTMEDVSystemeGmbH_EmailSignature	17.12.2014 12:47	Text Document	1 KE
	PTMEDVSystemeGmbH_GroupCalendar	17.12.2014 12:25	Text Document	1 KE
🌉 This PC	PTMEDVSystemeGmbH_RecordCounter	17.12.2014 12:31	Text Document	1 KE
🕎 C on PC-ELITE				
🕎 D on PC-ELITE				
膧 Desktop				
Documents				
🗼 Downloads 📃				
				>
File	name: PTMEDVSystemeGmbH_DocumentsCorePackClientBased_key			~
			Open	Cancel ad

Figure 39: Upload license

Next, click in the *License Preview*-window on the *[Install this]*-button to finish the license installation.



### 2.6.2 License for Server Based Document Generation

The license for the Server Based document generation is based on the number of active users in your Dynamics 365. The Server Based license always comes with one Template Designer license. If you need more, you can purchase additional DocumentsCorePack licenses.

We have two ways to license the Server Based document generation:

#### 1. Online Subscription

This is the correct licensing method if you have Dynamics 365 Online and don't want to install anything locally on your environment. Depending on the size of your Dynamics 365 Organization you can decide between Small, Medium, Large and Enterprise. Details can be found <u>here</u>.

#### 1. On-Premise purchase

This version can be installed on your Dynamics 365 server (On-Premise or IFD). Depending on the size of your Dynamics 365 Organization you can decide between the different packages. You can find the prices in the navigation on left.

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

Search for "LicenseManager - DocumentsCorePack for Dynamics 365" in your Start Pane and run the program.



Figure 40: LicenseManager – DCP for Dynamics 365

The Dynamics 365 Connection setup window appears. Choose the appropriate organisation and click on *[OK]*. Normally you just need to hit *[OK]*.



Logon information					
Welcome to yo Please specify your c connection details, p	ur Dynamics 3 onnection details to lease contact your s	65 Connection se connect to Dynamics 3 ystem administrator	etup. 365. If you do	not know	the
Dynamics 365 Connection	on Advanced Settings	Log			
Existing Profiles	HKLM] crm.crmtest.local	:5555		~	Manage
- Select your Dynamics	365 Type				
OnPremise		)/Hosted	Online		
Dynamics 365 Server-	Url:				
http://crm.crmtest	local:5555				<b>*</b>
Authenticated as:	ntials crmtest.local\adr	ninistrator main crmtest.local	Password		
udininise udininise					
	[	Retrieve all	]		
Organization informa	ition:	1			
Friendly name	Unique name Standard	ServiceURL			
2 crm2016	crm2016	crm2016			
				OK	Cancel

Figure 41: Logon information

In the so opened window navigate to LicenseManager to open the License Manager as you can see in the figure blow.

	License Ma	nager		u x
License Manager Select a product from the list on the left sig or install/update a license	de to view it's licensing o	details	mscrm-addons.c DocumentsCorePack for Dynam	OM ics 365
Installed Products	Current system infor	mation - Standard@http	://crm.crmtest.local:5555	e
ActivityTools	Your license is Valid			
	General license inform	nation (CRM 8.2.2.112)		
AttachmentExtractor		LicenseValue	Systemvalue	Status
	Licensemodel	perSite		0
Client	Licensekey	4cNf5FXDCFRL8IKUFc/OzmN	Licensekey installed	0
	BusinessUnit	Standard	Standard	
Server Based Generation	Number of site licenses	85	7	*
	Licenses for Readonly Users	0	0	4
GroupCalendar	Expiration	18.01.2019 00:00:00	2 days left	4
C.	Support	18.01.2019 00:00:00	2 days left	<b>*</b>
RowerSearch	Issued product	DocumentsCorePack Server	DocumentsCorePack Server Base.	. 🔶
	Version upgrade covered	18.01.2019 00:00:00	06.12.2018 14:50:16	<b>*</b>
💷 SmartBar	License Status			
	LicenseState		valid	1
C TelephoneIntegration	Select license file:			ŝ
				Close

Figure 42: The License Manager



If your license has expired, please upload the license text file, sent by our support-team with a click on the folder-symbol, highlighted in yellow in the figure above.

<b>10</b> 8	Open license file			×
🔄 🕘 🗸 🚺 🕨	censes	× ¢	Search Licenses	Q
Organize 🔻 New fol	er		=	
☆ Favorites	Name	Date modified	Туре	Size
Desktop	PTMEDVSystemeGmbH_AttachmentExtractor	17.12.2014 12:45	Text Document	1 KI
🚺 Downloads	PTMEDVSystemeGmbH_DocumentsCorePackClientBased_key	17.12.2014 12:40	Text Document	1 KI
🖳 Recent places	PTMEDVSystemeGmbH_EmailSignature	17.12.2014 12:47	Text Document	1 K
	PTMEDVSystemeGmbH_GroupCalendar	17.12.2014 12:25	Text Document	1 KI
👰 This PC	PTMEDVSystemeGmbH_RecordCounter	17.12.2014 12:31	Text Document	1 K
🕎 C on PC-ELITE				
🖵 D on PC-ELITE				
膧 Desktop				
Documents				
\rm Downloads				
File	ame: PTMEDVSystemeGmbH_DocumentsCorePackClientBased_key			~
			Open	Cancel

Figure 43: Upload license

Once the permanent license for your mscmr-addons.com solution has been installed the window looks like in figure 63:



### 2.7 Upgrade

For upgrading your DocumentsCorePack version, just rerun the setup. The final step of the upgrade is to execute the DocumentsCorePack Configuration as shown in CHAPTER 2.4 CLIENT & SERVER BASED GENERATION SETTINGS ON PAGE 15. The configuration is necessary to upgrade DocumentsCorePack properly!



## 3 How to install DCP 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 have a 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" <u>Download</u>

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

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

Basic installation/configuration of our addon:

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

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

**2.** You will be asked for the Logon 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 on **[OK]**.



		Logon information			
Welcome to y Please specify your connection details,	our Dynamics connection details please contact you	365 Connection setu to connect to Dynamics 365. r system administrator	p. If you do	not know	the
Dynamics 365 Connec	tion Advanced Settin	gs Log			
Existing Profiles	[HKLM] crm.crmtest.lo	cal:5555		~	Manage
- Select your Dynami	cs 365 Type				
O OnPremise	۲	IFD/Hosted	Online		
Dynamics 365 Serve	r-Url:				
http://crm.crmte	st.local:5555				✓
Authenticated as: – Use default Cred Username admini	entials <b>crmtest.local\a</b> strator	administrator Domain crmtest.local	Password	•••••	
		Retrieve all			
Organization information	nation:				
Friendly name	Unique name	ServiceURL			
👷 Standard	Standard	Standard			
👷 crm2016	crm2016	crm2016			
				OK	Cancel

Figure 44: Logon information: IFD/Hosted Connection

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

<b>6</b> ]	Internet Infor	mation S	Services (IIS) Mai	nager		
CRM201	3SRV1 🕨 Sites 🕨					
File View Help						
Connections	Citer				Act	tions
😪 - 🔚 🖄 🔝	Sites				0	Add V
Start Page	Filter:	- 3	🖉 Go 👒 🕁 Show A			Set W
Application Pools	Name	ID	Status	Bind	0	Help
⊿ 🧕 Sites	😌 ActivityToolsser	5	Started (ht	*:55!		Online
ActivityToolsse	😌 Default Web Site	1	Started (ht	*:80		
Default Web Sit	DocumentsCore	3	Started (ht	*:55!		
		1	Started (ht	*:55!		
D 😌 GroupC 🔎 🖻	xpiore		Started (ht	:555		
D . Microso E	dit Permissions					
🔗 A	dd Application					
A 📆	dd Virtual Directory					
E	dit Bindinas	_				
-		_				
	lanage website	•				
🖅 R	efresh					
🗙 R	emove					
R	ename					
S	witch to Content View					

Figure 45: Internet Information Services

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



			Site	Bindings	?
Type http	Host Name	Port 5556	IP Address	Binding Informa	Add
	Type: http	IP ac	Add Si ddress: Unassigned	te Binding Port: ✓ 4446	? ×
	Host name:   Example: www.e	contoso.cor	n or marketing.co	ontoso.com	
_				ОК	Cancel

Figure 46: Add Site Bindings

With this step, we made the web site available for https. Click on the [OK]-button.

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

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

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

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

**7.** Open your Dynamics 365 in the Internet Explorer and go to "Settings" -> "MSCRMADDONS.com Products" -> Open the Addon -> in the MSCRM-ADDONS.com Products from select the MSCRM-ADDONS.com Settingskeys and search for the "WebApplicationPort" entry.

Dynamics 365	Settings 🗸	Products >	ድ <sub>መ</sub>	+ 7	٥	?	
+ NEW 💼 DELETE 🖂 🗸	🖘 EMAIL A LINK 🛛 👻	🖹 RUN REPORT 🔻	Steppert to exc	EL 👻 ***			
➡ Active MSCRM	-ADDONS.c	om Produc	ts 🗸 💷				Q
✓ Name ↑		Product Type	Created By 0	Created On		T	e '
ActivityTools		server	Ternek, Christian	27.Feb.11 16	5:31		5
AttachmentExtractor		server	Kokely, Christoph	15.Apr.15 13	8:23		arts
AutoMerge		server	Ternek, Christian	28.Mär.12 07	:49		
ClaimCase			4FullAccess, CR	06.Dez.17 10	0:19		$\square$
DataCompression		server		22.Apr.17 22	2:58		(
DocumentsCorePack		server	Ternek, Christian	27.Feb.11 10	):54		
EmailMonitoring			Koryakin, Andrey	31.Mai.17 12	2:35		
GroupCalendar		server	admin, crm	02.Mär.11 14	k17		
Plugin		server	Ternek, Christian	27.Feb.11 08	8:59		
PowerSearch		server	Ternek, Christian	27.Feb.11 08	8:59		
SmartBar		server	4FullAccess, CR	04.Apr.14 18	8:45		
Synchronization			Koryakin, Andrey	29.Mär.17 10	):48		
TelephoneIntegration		server	Ternek, Christian	27.Feb.11 11	1:21		
Utilities		server	Ternek, Christian	27.Feb.11 09	0:03		

*Figure 47: Active MSCRM-ADDONS.com Products* 



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

We have finished the configuration of the Dynamics 365 Part and now need to configure the ADFS.

- 1. Please logon your AD FS Server and start AD FS 2.0 Management.
- 2. On the action menu located in the right column, click "Add Relying Party Trust".
- 3. In the "Add Relying Party Trust"-wizard, click "Start"
- **4.** On the "Select Data Source" page, click "Import data about the relying part published online or on a local network" and then type in the URL to locate the "federationmetadata.xml" file.

This federation metadata is created with the IFD-tool on the Dynamics 365 server. For example, https://activitytoolsserver.rc1ifd.ptmedv.at:4446/FederationMetadata/200706/FederationMetadata.xml

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

- 5. Click "Next".
- **6.** On the "Specify Display Name" page, type in a display name such as DocumentsCorePack IFD, and click on "Next".
- **7.** On the "Choose Issuance Authorization Rules" page, leave the "Permit all users to access this relying party" option selected and then click "Next".
- 8. On the "Ready to Add Trust" page, click "Next", and then click "Close".
- 9. If the "Rules Editor" appears, click on "Add Rule". Otherwise, in the "Relying Party Trusts" list, right-click the relying party object that you created, click "Edit Claims Rules" and then click "Add Rule". Important: Be sure that the "Issuance Transform Rules" tab is selected.
- **10.** In the "Claim rule template" list, select the "Pass Through or Filter an Incoming Claim" template, and then click "Next".
- **11.** Create the following rule:
  - Claim rule name: Pass Through UPN (or something descriptive)
  - Add the following mapping:
  - i. Incoming claim type: UPN
  - ii. Pass through all claim values
- 12. Click "Finish".



- **13.** In the "*Rules Editor*", click "*Add Rule*" and in the "*Claim rule template*" list select the "Pass Through or Filter an Incoming Claim" template. Then click "Next":
  - Claim rule name: Pass Through Primary SID (or something descriptive)
  - Add the following mapping:
  - i. Incoming claim type: Primary SID ii. Pass through all claim values
- **14.** Click Finish.
- 15. In the "Rules Editor", click "Add Rule".
- **16.** In the "*Claim rule template*" list, select the "*Transform an Incoming Claim*" template and then click "*Next*".
- **17.** Create the following rule:
  - Claim rule name: Transform Windows Account Name to Name (or something descriptive)
  - Add the following mapping:
  - i. Incoming claim type: Windows account name
  - ii. Outgoing claim type: Name
  - iii. Pass through all claim values
- **18.** Click "*Finish*" and when you have created all three rules, click on "*OK*" to close the "*Rules Editor*".

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



## 4 Troubleshooting

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

Server E	rror in '/' Application.
ID4175: Th tokens from	he issuer of the security token was not recognized by the IssuerNameRegistry. To accept security n this issuer, configure the IssuerNameRegistry to return a valid name for this issuer.
Description: An u	nhandled exception occurred during the execution of the current web request. Please review the stack trace for more information about the error and where it originated in the code.
Exception Detail configure the issuerfi	is: System IdentlyModelTokens SecurityTokanException: D4175: The issuer of the security token was not recognized by the issuer/ameRegistry. To accept security tokens from this issuer, ameRegistry to raturn a valid name for this issuer.
Source Error:	
An unhandled location of t	exception was generated during the execution of the current web request. Information regarding the origin and the exception stack trace below.
Stack Trace:	
[SecurityTakeni Nicrosoft.IL Nicrosoft.U Nicrosoft.IL Nicrosoft.IL Nicrosoft.IL System.Web.3 System.Web.3	<pre>inception: ID4175: The issuer of the security token was not recognized by the IssuerNameRegistry. To accept security tokens from this is dentityModel.Tokens.Saml11.Saml11SecurityTokenMandler.CreateClains(SamlSecurityToken samlSecurityToken) +738 BentityModel.Tokens.SecurityTokenMandlerCollection.ValidateToken(SecurityToken token) +644 BentityModel.Neb.Tokens.SecurityTokenMandlerCollection.ValidateToken(SecurityToken token) +117 BentityModel.Neb.TokensReceiver.AuthenticateToken(SecurityToken token, Boolean ensureBearerToken, String endpointUri) +151 BentityModel.Neb.TokensReceiver.AuthenticateToken(SecurityToken token, Boolean ensureBearerToken, String endpointUri) +151 BentityModel.Web.WSFederationAuthenticationModule.SignTAMitHRespondHexesspe(HttpRequest reguest)4615 BentityModel.Web.WSFederationAuthenticationModule.UnAuthenticateRequest(Object sender, EventArgs args) +521 SyncEventExecutionStep.System.Web.HttpApplication.IExecutionStep.Execute() +80 HttpApplication.ExecuteStep(IExecutionStep step, Boolean&amp; completedSynchronously) +270</pre>
Version Informa	tion: Microsoft NET Francework Version 4.0.30319, ASP.NET Version: 4.0.30319.237

Figure 48: Error message

#### Reason 1:

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

```
<issuerNameRegistry
type="Microsoft.IdentityModel.Tokens.ConfigurationBasedIssuerNameRegistry,
Microsoft.IdentityModel, Version=3.5.0.0, Culture=neutral,
PublicKeyToken=31bf3856ad364e35">
<trustedIssuers>
<trustedIssuers>
<add thumbprint="37a59abae1a394ffd8f0fd750c2e38e98069e349"
```

name="http://win2008domain.ptm-edv.at/adfs/services/trust" />

</trustedIssuers>

</issuerNameRegistry>

#### Reason 2:

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

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



### Checklist for general troubleshooting:

- Is the Setting WebApplicationPort still intact
- Are there any not http/https bindings in Dynamics 365
- Are there any not http/https bindings in the products website
- Is the DNS correctly resolving the products link?
- Has the ConnectionProfile been created with IFD as connection type



## 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 Turn Windows features on or off.

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

- Start by running the "Server Manager", if it is not already open, from either:
  - On the Windows taskbar, click the Server Manager button
  - On the Start screen, click Server Manager.
- Under "*Manage*" menu, select "*Add Roles and Features*" (or press "Add roles and features" under the Dashboard panel)
- On the Before You Begin screen, click "Next"
- On the Installation Type screen, select "Role-based or Feature-based Installation" and click "Next"
- On the Server Selection screen, select the appropriate server, leave the default options and click "Next"
- On the Server Roles screen, click "Next"
- On the Features screen, select "Windows Identity Foundation 3.5" and click "Next"

è	Add Roles and Features Wizard	_ <b>_</b> X
Select features Before You Begin Installation Type Server Selection Server Roles Features Confirmation Results	Add Roles and Features Wizard         Select one or more features to install on the selected server.         Features         Image: Interfaces and Infrastructure (Installed)         Windows Biometric Framework         Windows Feedback Forwarder         Image: Windows Internal Database         Image: Image	Description  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 applications.  WIF 3.5 has been superseded by WIF 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.
	WINS Server         v           <	> Install Cancel

Figure 49: Windows features: WindowsIdentifyFoundation 3.5

• On the Confirmation screen, select "Restart the destination server automatically if required" and click "Install":



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

Figure 50: Confirm installation selection

- When the installation completes, the wizard reflects the installation status on the Results screen
- Click "Close" to exit the wizard.



## 6 DocumentsCorePack Templates

DocumentsCorePack templates are predefined Word-templates which have some DocumentsCorePack merge fields in it. You can define several templates for each Microsoft Dynamics 365 entity (e.g. account, contact...).

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

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

### 6.1 How to create DocumentsCorePack templates?

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

### 6.2 Import/export existing DocumentsCorePack templates

Open your DocumentsCorePack Server Configuration and choose the organisation for which you want to import/export the Templates and click on the **[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.loc	al:5555 V Manage					
Select your Dynami	cs 365 Type						
OnPremise	01	FD/Hosted Online					
Dynamics 365 Serve	r-Url:						
http://crm.crmte	st.local:5555	✓					
Use default Cred	entials <b>crmtest.local\a</b> strator [	dministrator Domain crmtest.local Password					
		Retrieve all					
Organization infor	mation:						
Friendly name	Unique name	ServiceURL					
👷 Standard	Standard	Standard					
2016 crm2016	crm2016	crm2016					
		OK Cancel					

Figure 51: Logon information – open the organization to import/export templates

In the so opened Organization overview-window, select an organization to access to the Configurations and select "*Client & Server Based generation settings*" – highlighted in yellow in the figure below.



<b>1</b>	View Organi	zation Installation	States - Documents	CorePac	c 2017.169	_ 🗆 X	Л
Organization of Please select an org configuration or lice	functionalities, like		DocumentsCo	addons.com rePack for Dynamics 365			
					Available Organizations:	~	
Friendly name Standard	Unique name Standard	Installation State DocumentsCorePac	k is INSTALLED	BuildNr. 2017.169	AutoMergeGlobalButton 2017.39	DocumentsCorePack by ms 2017.169	
<						>	
Reinstall/Upgrade L	icenseManager Uninstall	Get IFD Setup	Configurations •			Close	
Figure 52: Client	& Server Based generation	on settings	Client & Se Configure Client	e <mark>rver B</mark> nt & Serve	ased generation s er Based document gene	ettings eration settings	Launch
	🗌 🗌 Enable debu	igging (Ca	aution! Slow)				
	Service Co Set up a servic print jobs	nfigura e for Serv	i <mark>tion</mark> er Based Document Ger	eration in Dynamics 365-	Launch Online an		

This action will open the DocumentsCorePack Client Configuration. Here selcet the General Settings tab.

DocumentsCorePac	k Server Config v2017.	166 // crm2016 @ http://crm.crmtest.local:	-		x
CommandBar Genera	al Settings SharePoint Adv	anced			
	Import DCP Templates	Export All Templates			
	Language Debug	en v			
	Datasource:	user-dependent 🗸			
	Names to cut	parentcustomerid-pc1,parentaccountid- pa1,nationnameid-nn1			
	Replace Special Characters				
	Additional Entities	pricelevel, territory			
	Entities don't show	invoicedetail			
	Unavailable Entities	accountleads, activity party, annual fiscal			
ſ	Folder Displayattribute				
	Here you can define the at entity which should be us foldername (affects both, ) File Explorer). You could ig setting when you don't sa documents in one of this l default the "name" attribu	tribute for each ed for the SharePoint and more this ve your coations. Per te is used.			
	Metadata Cache (Not create				
l	Server Base	d Document Generation Settings			
		ОК	(	Cance	1

Figure 53: The General Settings-tab



Here you have the possibility 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.



Figure 54: The Template Import Manager

For more information about how the Template Import Manager works, please have a look at the corresponding documentation – <u>DocumentsCorePack ServerBased User Guide</u> (chapter 5 DCP Template Import Manager).

Now the templates are imported/exported in MS Word and ready to use. Therefore go to the *www.mscrm-addons.com* – tab and click on "*Open Template*" (highlighted in yellow).

	🕞 🕤 🗧 Activity_Overview.docx [Compatibility Mode] - Word Administra					rator@crmtest.local	A						
File	Home	Insert	Design	Layout	Reference	es Mailings	Review	View [	Developer	Help	www.mscrm-addons.com	n 🔉 Tell me	
📕 Oper	n Template					4	2		Rows a	nd Colum	ns 🔻 📝 Field properties		
Save	Template		Chases C	PDF	Cauco ac	Pacuments Core	Halp	Standard	🛛 🐴 Gro	uping -	Table properties		
🛂 Inser	t MailMerge	Fields	Data Ac	tivity PDF *	DOCX -	Pack Settings	пер	Standard	Dele	ete Field			
	Templates			Get Data		Settings	Help	Organizatio	on	I	Edit Table		

Figure 55: The www.mscrm-addons.com – tab: 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 <u>XML File</u>.

### 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 on the Client

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

**NOTE**: Please note that these languages 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 at start up by the registry setting "**Language**". To modify this setting, follow this procedure:

- 2. Press START RUN.
- 3. Type "regedit" and click OK.
- 4. Locate the registry key HKEY\_LOCAL\_MACHINE\Software\PTM EDVSysteme\
- 5. DocumentsCorePackClient2018.
- 6. Change the value of the "language" setting to another language.
- 7. Close the registry editor.

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

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



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

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

The language file is located in the sub folder **localization** of DocumentsCorePack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Server for Dynamics365\Localization".

#### Example:

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

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

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

7.2.2 How to translate a language file on the server

Have a look at Chapter 7.1.3 How to translate a language file on page 49.



## 8 Per User Licensing-option

Open your Dynamics 365 and navigate to Settings and select Security as you can see highlighted in yellow below.

🎲 mscrm-	- <b>addons</b> .com	Settings ~ <sub>Securi</sub>	ity	
Sales	Service	Marketing	Settings	> Training
Business	Customization	System		Process Cen
Business Management	Customizations	Administration	Email Configuration	Processes
Templates	Solutions	Security	Activity Feeds Configu	
Product Catalog	← Plug-In Trace Log	Data Management	Activity Feeds Rules	>
2 Unified Service Desk		System Jobs		
Service Management		Document Manageme		
		Auditing		
Figure 56: Dynamics 36!	5 Settings – Security			

In the *Security*-window you see the option "Users" where you are able to add, edit information about users and activate/deactivate.

é	mscrm- <b>addons</b> .com	Settings	~	Security
SMART	BAR DIALOG 🔊 POWERSEARCH			
Security	/			
Which fea	ture would you like to work with?			
	<b>Users</b> Add new users. Edit information about users and deactivate user records. Manage the teams, roles, and licenses assigned to users.		<b>Tea</b> Add desc	<b>ms</b> new teams and new members to existing teams. Modify the team ription and delete members from teams.
	Security Roles Create new security roles. Manage and delete existing security roles for y organization.	our	Bus Add the p	<b>iness Units</b> new business units. Edit and deactivate existing business units. Change parent business unit.
20	Field Security Profiles Manage user and team permissions to read, create, or write information i secured fields.	n <b>e</b>	Hie Conf selec spec	rarchy Security igure hierarchy security, including enabling hierarchy modeling and ting the model. You can also specify how deep the hierarchy goes, and ify the entities to exclude from a hierarchy.
	<b>Positions</b> Add new Position. Modify the Position description.		Acc Add	<b>ress Team Templates</b> new team templates. Modify the team template description.
Figure 57: S	Security – Users			



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



	mscrm- <b>addons</b> .co	om	Setting	s ~	Securit	ty				
+ NE	w 🖧 new multiple users 🖋 edit 🛛 enab	LE 🔀 DISABLE	EXPOR	RT TO WO	RD 🕴 🔻	•••				
₩ [	Enabled Users 🗸					Search fo	or records			Q
$\checkmark$	Full Name 🛧	Site		Business	Unit		Title	Main Phone	Ŧ	С
	Chris Preston			Standard						
	Christian Ternek			Standard						
	crm admin			Standard						
	max muster			Standard						
	Max Mustermann			Standard						
~	Michael Dohr	Eastern and Cen	tral Regio	<u>Standard</u>						
	Tom Patterson			Standard						

Figure 58: Enabled Users

Double-click on the user you want to activate/deactivate and scroll down. By setting this option to "No" for Per User Licensing for DocumentsCorePack (ClientSide) (highlighted in yellow), the license will be disabled for this user.

🛟 mscrm- <b>addons</b> .com	Settings ~	Security	Michael Dohr	>				
🔜 SAVE & NEW 🕂 NEW 🗳 CONNECT 🖂 🖬 EXPORT TO WORD	▼ CREATE DO	DCUMENT	PROCESS 🔻	•••	Ϯ	<b>1</b>	<b>3</b> 1	×
Michael Dohr -=								
() The information provided in this form is viewable by the entire organizati	on.							
Per User Licensing for PowerSearch for MS CRM 2015								*
Activate User								
Per User Licensing for Telephone Integration Activate User Yes								
Activate User No								
Per User Licensing for DocumentsCorePack (ServerBased)								
Activate User								
Figure 59: Deactivate User								



The disabled User license also disables the "Create Document" -button as shown in the following screenshot.

	🔹 🎲 mscrm- <b>addons</b> .	com	Sales	~ Co	ontacts	>		
+1	NEW 🛅 DELETE 🔻 🖘 EMAIL A LINK 🔻	🖹 RUN REPORT 🔻	X EXCEL	TEMPLATES	5 <b>- ⊠</b> ,	EXPORT TO EXCEL	<b>*</b> ***	
							🕞 Import Data	•
-	Active Contacts 🗸					Search for records	Chart Pane	×
							唱 View	
$\checkmark$	Full Name 🛧	Email		Company Na	me	Business Phone	🔤 New System View	
	Alan Brewer	someone@example	e.com	Lots of Bikes	Storehouse	555-0123	Customize Entity	
	Alan Waxman	someone@example	e.com			555-0189	🔅 System Views	
	Ale Test			Wide World	Importers	555-01312	📕 SmartBar Dialog	
	Alex Hankin	someone@example	e.com	Maintenance	and Repair	fo 555-0104	🔊 PowerSearch	
	Alex Litton	someone@example	e.com			555-0135	Or Combined	
	Simme CO. Dischlad Usen dischlad "Correte Desument" hetter							

Figure 60: Disabled User – disabled "Create Document"-button



## 9 Important information

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

### Example:

You have an existing document with two merge fields: parentaccountid\_name and parentaccountid\_fax

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

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

### For example:

From "customerid\_contact\_parentcustomerid\_address1\_fax" to

"cust\_cont\_par\_adr1\_fax"; Old templates won't be affected, but you have to add every field to the settings.



## 10 Uninstall DocumentsCorePack Server Component

In order to uninstall DocumentsCorePack Server for Microsoft Dynamics 365 select "Programs and Features" in the Control Panel.

Search for the DocumentsCorePack Server for Dynamics 365 in "Uninstall or change a program" and click on "Uninstall" (highlighted in yellow).

Programs and Features						×			
(	) 💿 👻 🕇 🧱 🕨 Control Panel 🕨 All Control Panel Items 🕨 Programs and Features			~ ¢	Search Progra	ms and Features	Q		
	Control Panel Home	Uninstall or change a program							
	View installed updates	To uninstall a program, select it from the list and then click Uninstall, Change, or Repair.							
8	Turn Windows features on or off Install a program from the network Activity Activity	Organize 👻 Uninstall				•=== +	0	)	
		Name	Publisher	Installed On	Size	Version		^	
		ActivityTools for Dynamics 365	PTM EDV-Systeme GmbH	19.12.2017	13,2 MB	2017.15			
		ActivityTools for MS CRM 2015	PTM EDV-Systeme GmbH	14.01.2015	55,1 MB	2015.3		_	
		Attachment Extractor Server for Dynamics 365	PTM EDV-Systeme GmbH	22.03.2018	37,7 MB	2017.8		=	
	DocumentsCorePack Client for Dynamics 365		PTM EDV-Systeme GmbH	18.12.2018	47,6 MB	9.20			
		DocumentsCorePack Server for Dynamics 365	PTM EDV-Systeme GmbH	15.01.2019	118 MB	2017.169			
		Fiddler	Telerik	10.05.2016	3,94 MB	4.6.2.3			
		🧒 Foxit Cloud		03.03.2015	6,73 MB	2.3.25.1124			
	Ci Foxit Reader Coogle Chrome CoupCalendar for Dynamics 365 Ci URL Rewrite Module 2		Foxit Software Inc.	03.03.2015	94,6 MB	7.0.6.1126			
			Google Inc.	01.10.2014		71.0.3578.98			
			PTM EDV-Systeme GmbH	10.10.2017	71,1 MB	2017.7			
			Microsoft Corporation	09.12.2015	2,58 MB	7.2.1952			
		Microsoft Dynamics 365 for Microsoft Office Outlook	Microsoft Corporation	04.12.2017		8.2.0002.0112			
	Microsoft Dynamics 365 Server		Microsoft Corporation	30.10.2017	585 MB	8.2.0002.0112		$\mathbf{v}$	
		ζ					>		
PTM EDV-Systeme GmbH Product version: 2017.169 Support link: www.mscrm-addons.com Help link: www.mscrm-addons Size: 118 MB						n			

Figure 61: Uninstall DCP Server for Dynamics 365

#### Following window appears:



Figure 62: Uninstall window DCP Server for Dynamics 365

Click on [Yes] to confirm Uninstall.

Click on [No] to stop the process.



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