# DocumentsCorePack Client

## for MS CRM 2013

Version 6.52
June 2015

**Client Installation Guide**
(How to install and configure DocumentsCorePack Client for MS CRM 2013)

# Table of Contents

# 1    Common Information

Before installing **DocumentsCorePack Client for MS CRM 2013**, please read this document and follow the steps carefully.

This setup contains all installations and configuration needed for using DocumentsCorePack Client.

## 1.1    Intended Audience

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

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

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

- Installing DocumentsCorePack Client for MS CRM 2013
- Configuring DocumentsCorePack Client for MS CRM 2013

# 2    License

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

# 3    Prerequisites

## 3.1    Microsoft .NET Framework 4.0 RTM is required

The RTM version of Microsoft .NET Framework 4.0 is required.

## 3.2    Supported CRM Versions

- Microsoft Dynamics CRM 2013 RTM On Premise
- Microsoft Dynamics CRM 2013 RTW Online
- Microsoft Dynamics Hosted (IFD)

## 3.3    Windows Identity Foundation

The Windows Identity Foundation is included in the setup and will be installed as part of the DocumentsCorePack Server Installation.

## 3.4 Supported Operating Systems

- Windows 7 32/64bit
- Windows 8 32/64bit
- Windows Vista 32/64bit
- Windows Server 2008 32/64bit
- Windows Server 2008 R2 32/64bit
- Windows Server 2012 32/64bit

## 3.5 Supported Word Versions

- Word 2003
- Word 2007
- Word 2010 32/64bit
- Word 2013 32/64bit

# 4 Introduction

You could install the DocumentsCorePack Client on every supported operating system which is able to connect to your CRM 2013 server. During the installation you have to specify at least one organization in which the DocumentsCorePack Client will be installed.

**Possible Installation Scenarios:**

1. *Install directly on a CRM 2013 On-Premise Server*
   You could install the DCP Server directly on a CRM 2013 On-Premise installation. By doing so, you will have full functionality like File Explorer- or SharePoint-integration. When you specify an On-Premise Connection Profile, you have to run the setup on the CRM server.

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

   a. SharePoint Folder and Site integration
   b. File Explorer integration

# 5 Installation Client Component

This chapter explains how to install the client component.

## 5.1 Installing the DocumentsCorePack Client

**IMPORTANT Before installing the components:**

      **1. Close all Office products (MS Word, MS Outlook…)**
      **2. Be sure that the machine is online to the MS CRM server.**

To ensure that Word and Outlook are not running, start the Windows **Task manager** and check that WINWORD.EXE and OUTLOOK.EXE are not running in the processes list.

**Install the component on the client:**

Run the "DocumentsCorePack Client for MS CRM 2013.exe" setup file.

You will see following window:
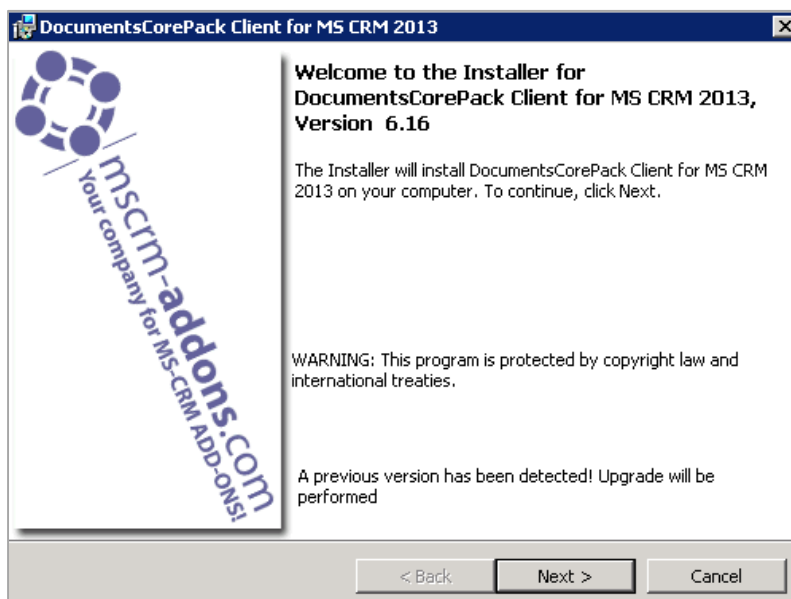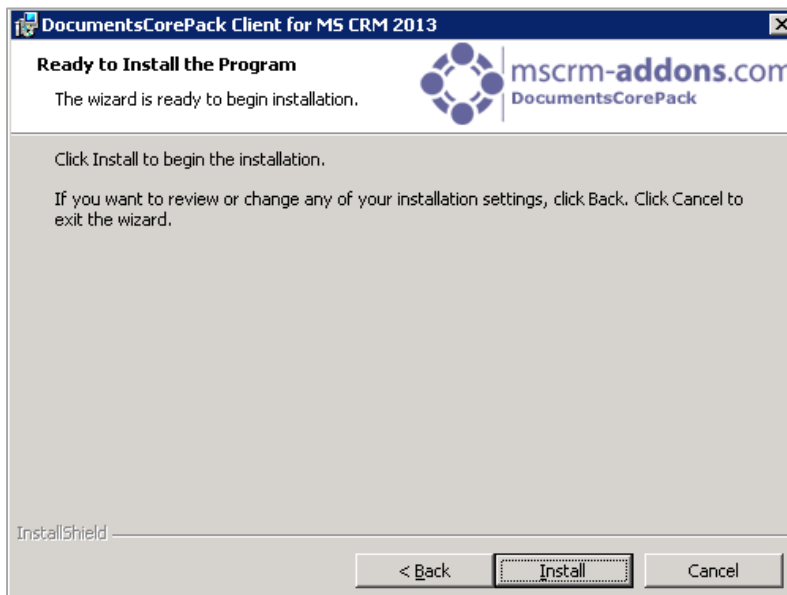


Click [Next >] to continue.

## 5.2 End User License Agreement (EULA)



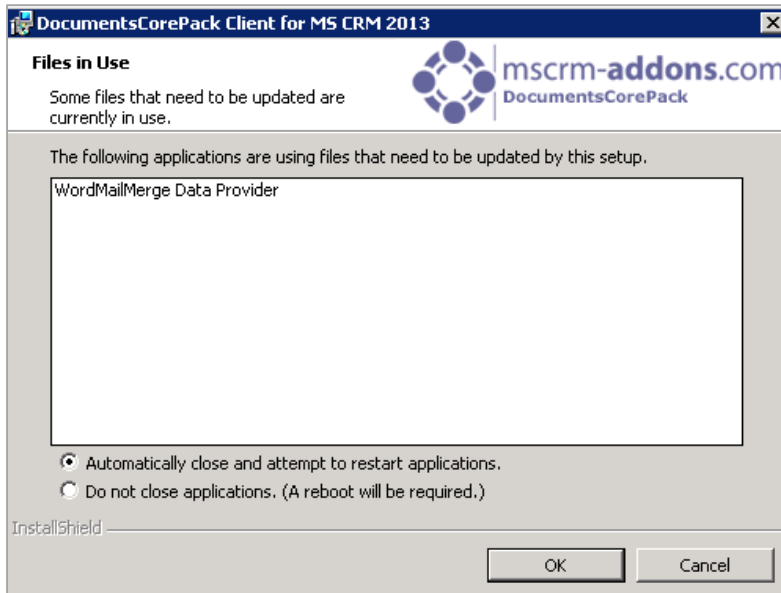Accept the license agreement and click [Next >].

Following window appears:

If this is a new installation you will automatically get to chapter 10.3.
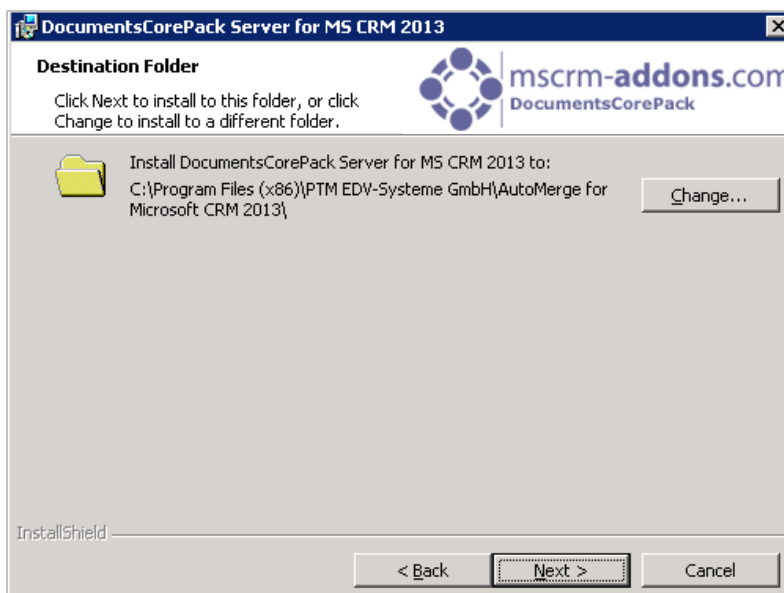


Click on [Install] to start the installation.

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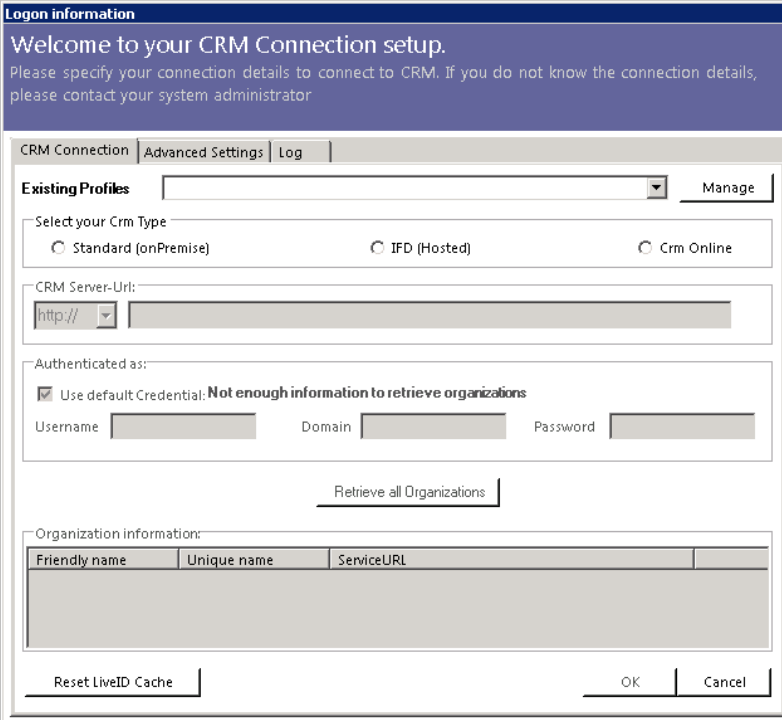


Click on [OK] to continue.

## 5.3   Select the installation folder



Select the installation folder and click [Next >].

## 5.4     Configure CRM Server

Next you have to configure your CRM server, select your profile or create a new profile and select your CRM Server type:



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

For DocumentsCorePack, the IFD setup is only required when using FileExplorer or SharePoint Folder and Sites Integration. You have to install IFD before you can use it. You can find the IFD wizard here: http://www.mscrmaddons.com/Downloads/DownloadIFDToolforMSCRM2011/tabid/195/ctl/Login/language/enUS/Default.aspx?returnurl=%2fDownloads%2fDownloadIFDToolforMSCRM2011%2ftabid%2f195%2fDefault.aspx
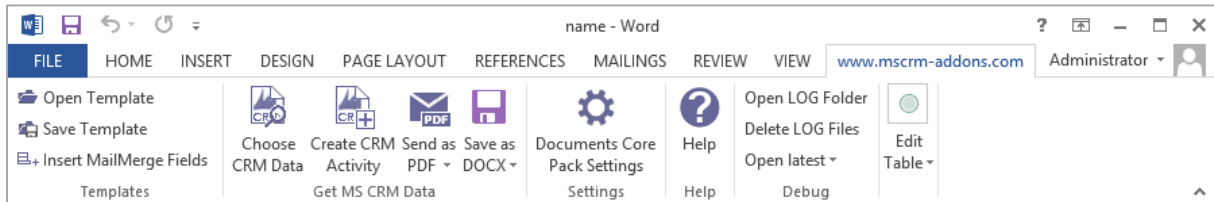
Click [OK] to continue.

## 5.5    Finish

The installation is now completed.  Click on [Finish].
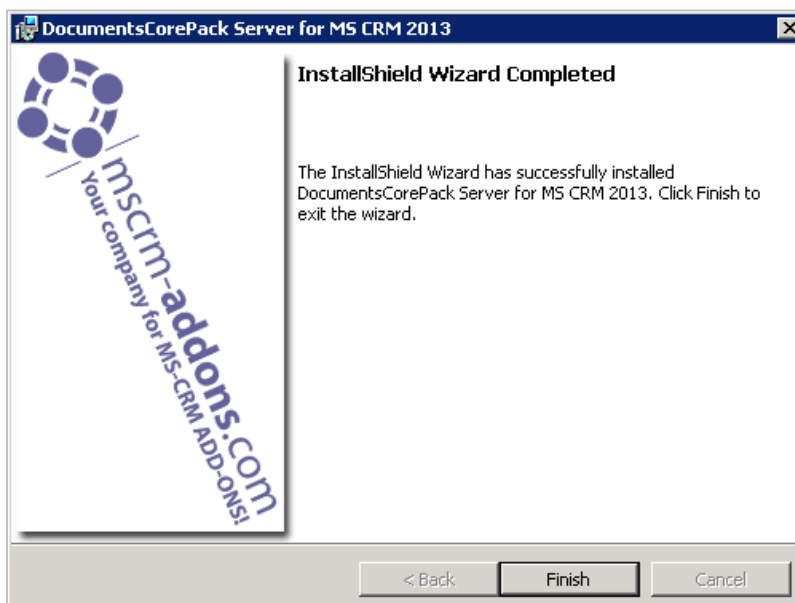
## 5.6 The "www.mscrm-addons.com"-tab

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



The www.mscrm-addons.com – tab contains several options, like create a template with the "Insert MailMerge Fields"-option, "Create CRM Activity" or to send the document as a .pdf. Click on the www.mscrm-addons.com sign.

Here you can, e.g. save your document back to the specific SharePoint folder related to the CRM-record. Or send your Document directly by clicking on the "Send as"-button. For more information, please read our DocumentsCorePack Client User Guide.

## 5.7 Installation on a Terminal Server / Windows Server 2008

To install DocumentsCorePack on a terminal server, you have to open the Control Panel and then the Add/Remove Programs-option. Click on the „Add new programs"-button. Now click on the „CD or floppy disc"-button to open the installation wizard and chose the DCP setup file. Finally, you have to click on [Finish] to start the installation.
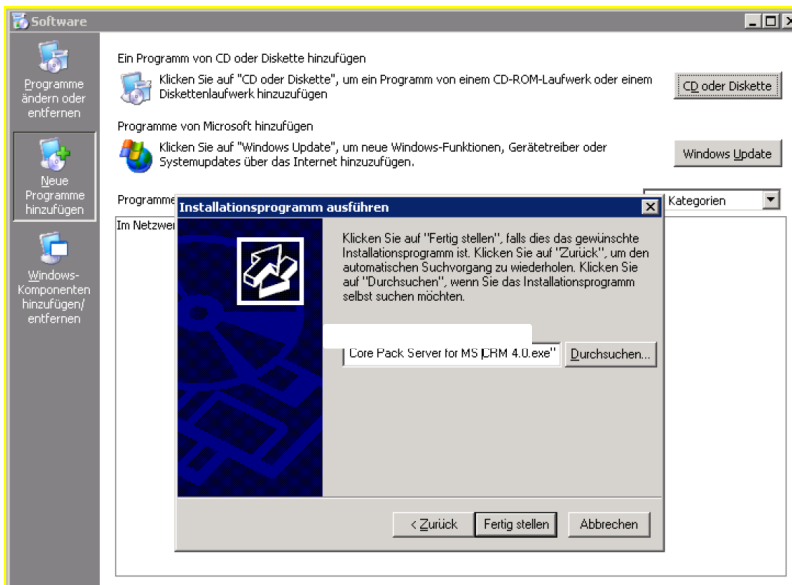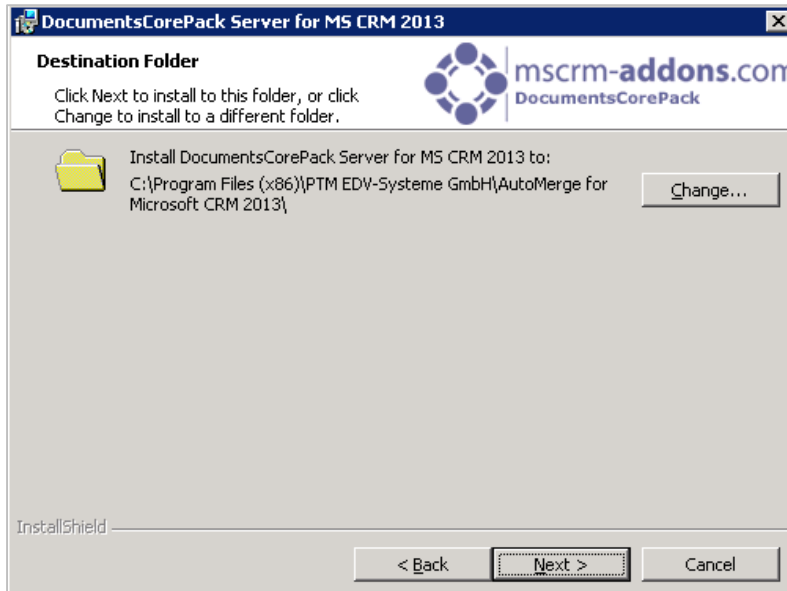
You will see following window:



Click [Next] to continue.
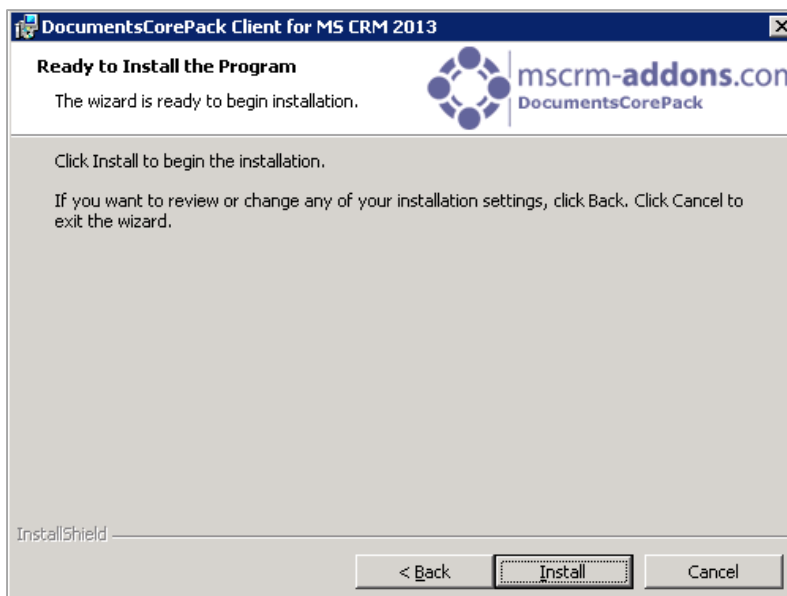
Following window appears:



Accept the End User License Agreement (EULA) and click [Next >] to continue.

Select Installation folder.
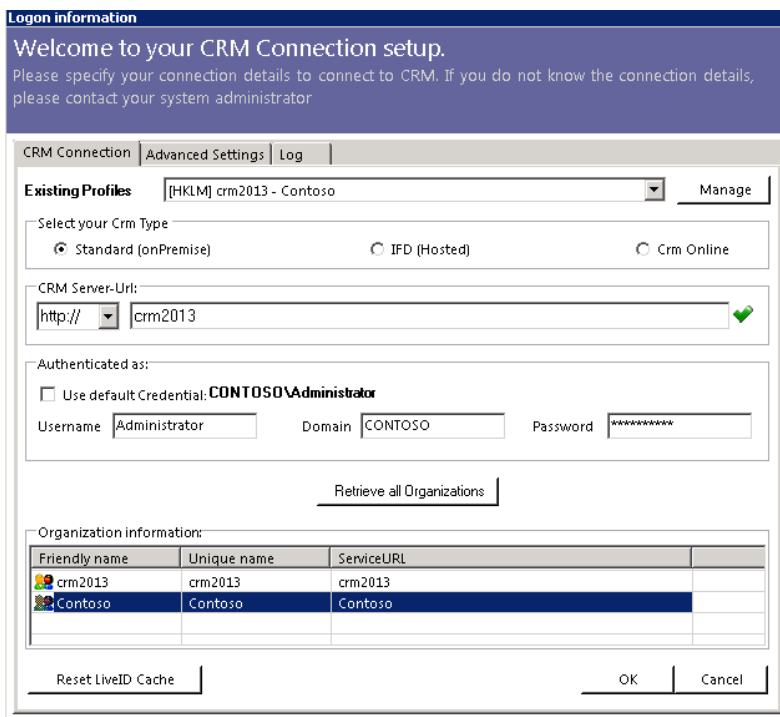


Click [Next >] to continue.

Next, confirm the installation:



Click [Install] to continue.

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

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

**IMPORTANT:** Finally, you have to change a registry entry to use integrated security.
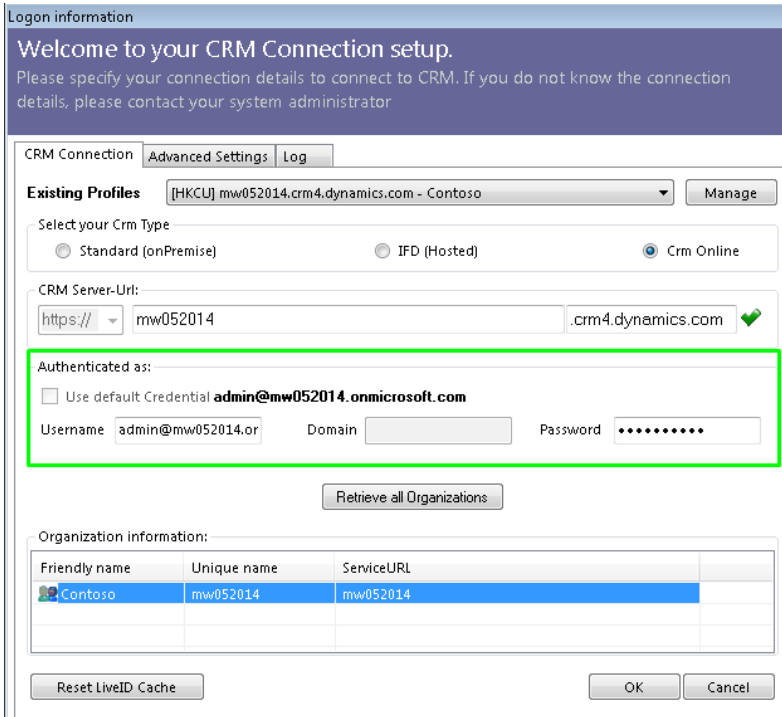
Start > Run > „regedit" and browse to "HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDVSysteme\ and choose the configured profile (you can see the profile used in the HKLM\SOFTWARE\PTM EDV Systeme\DocumentsCorePackclient2011\ActiveProfileSetting)

The regarding entry is called „**CrmUseIntegratedSecurity**". Change the value to „**true**".
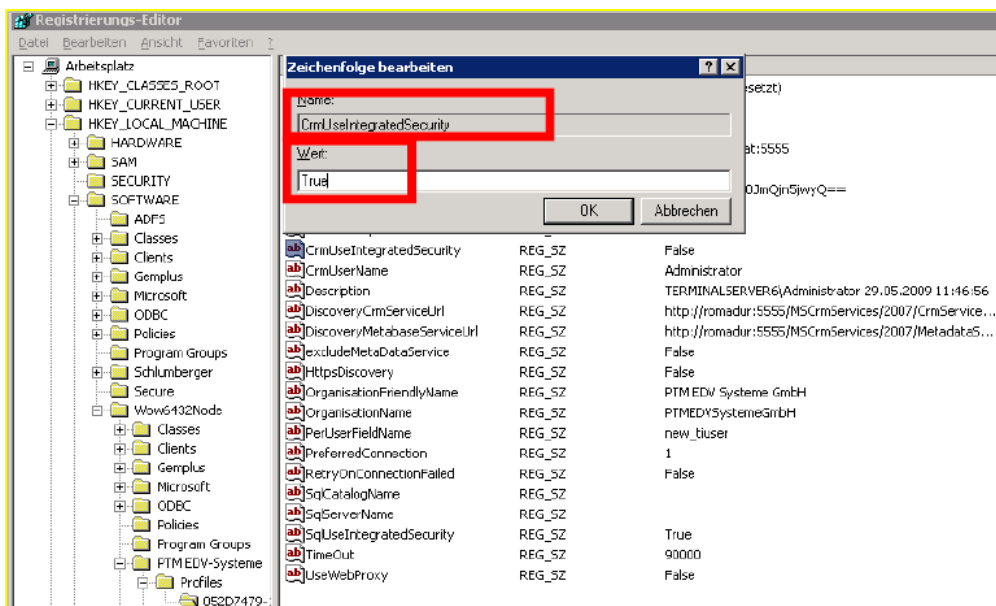
## 5.8    Installation on a Terminal Server for CRM Online

When installing DocumentsCorePack on a terminal server for CRM Online, you have to provide your "Login Credentials" for the initial installation. Enter a valid Username, and Password (see next screenshot).



Now you have to modify the registry so other users are able to create a connection with their own login credentials easily when they start using DocumentsCorePack for the first time on the Terminal Server.

[more]...

**1)** First of all, please run „regedit" in the Start Pane (see next screenshot)
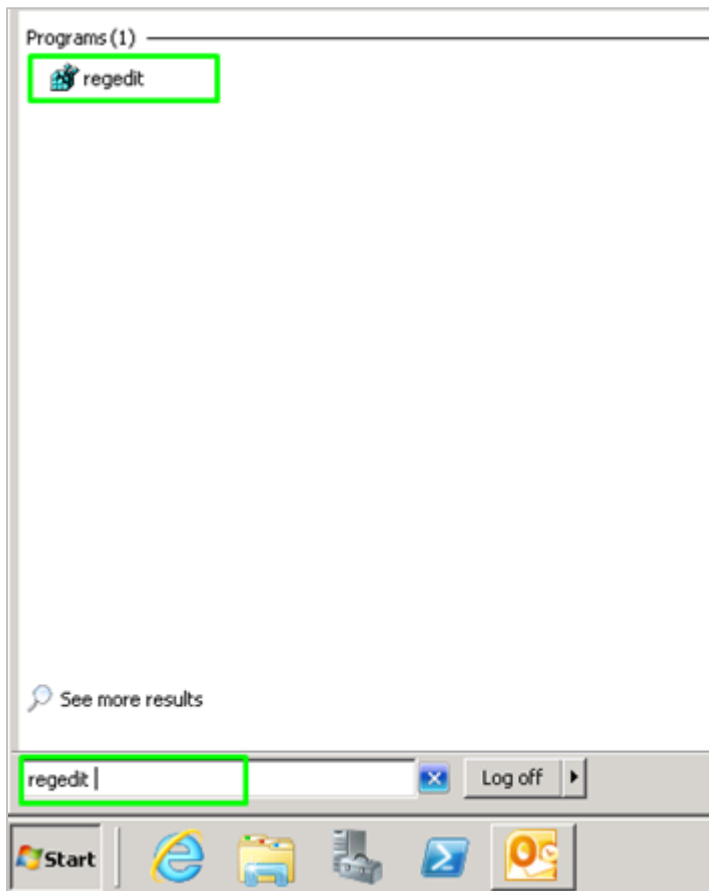


*Screenshot shows "regedit" in the Start Pane.*

Now browse to "HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDVSysteme\" and choose the configured profile (you can see the profile used in the "HKLM\SOFTWARE\PTM EDV Systeme\DocumentsCorePackclient2011\ActiveProfileSetting") (see next screenshot)

Dependent on the architecture of your server (x86 or x64) the location may vary "HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\PTM EDVSysteme\". If this node is present please also perfrom the following modification for these registry keys.
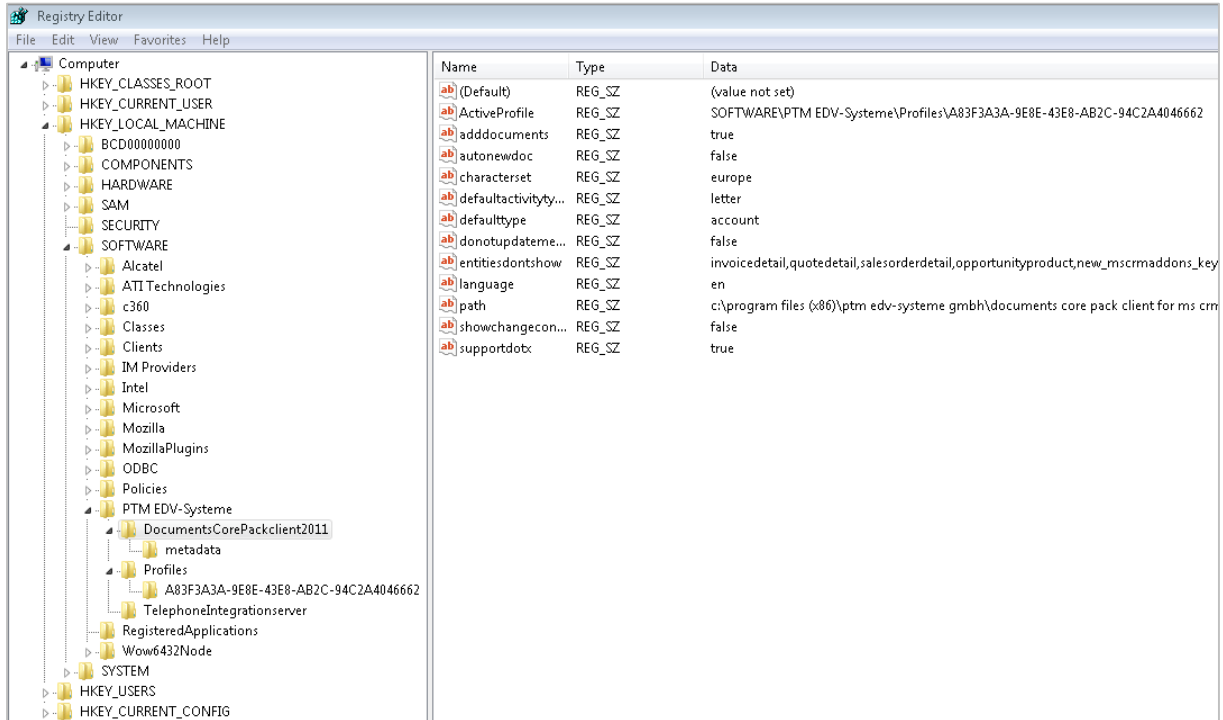
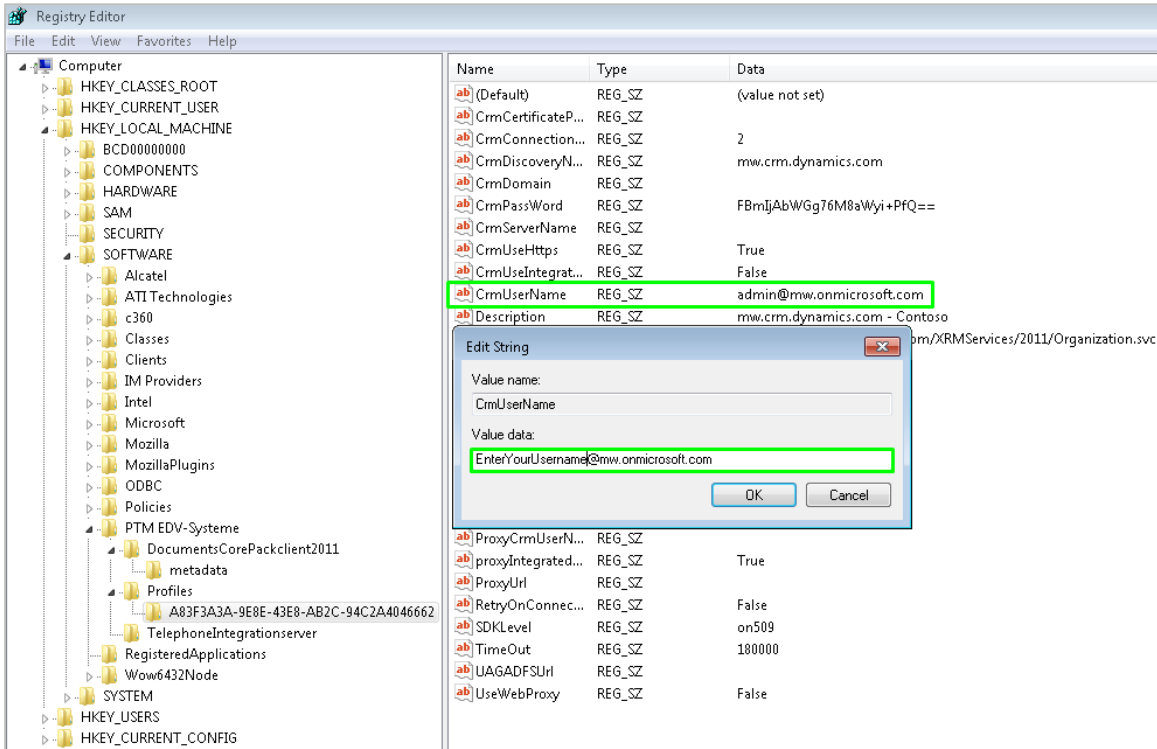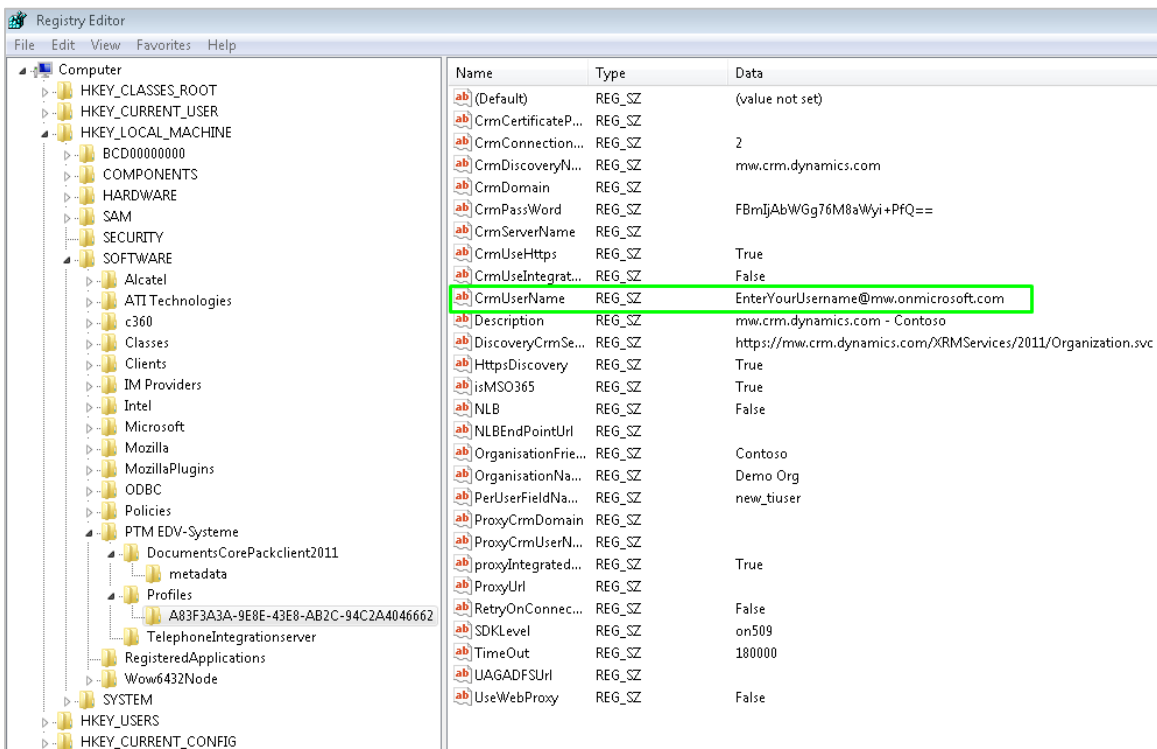**2)** Next, select the correct profile and search for the CrmUserName key (see next screenshot).
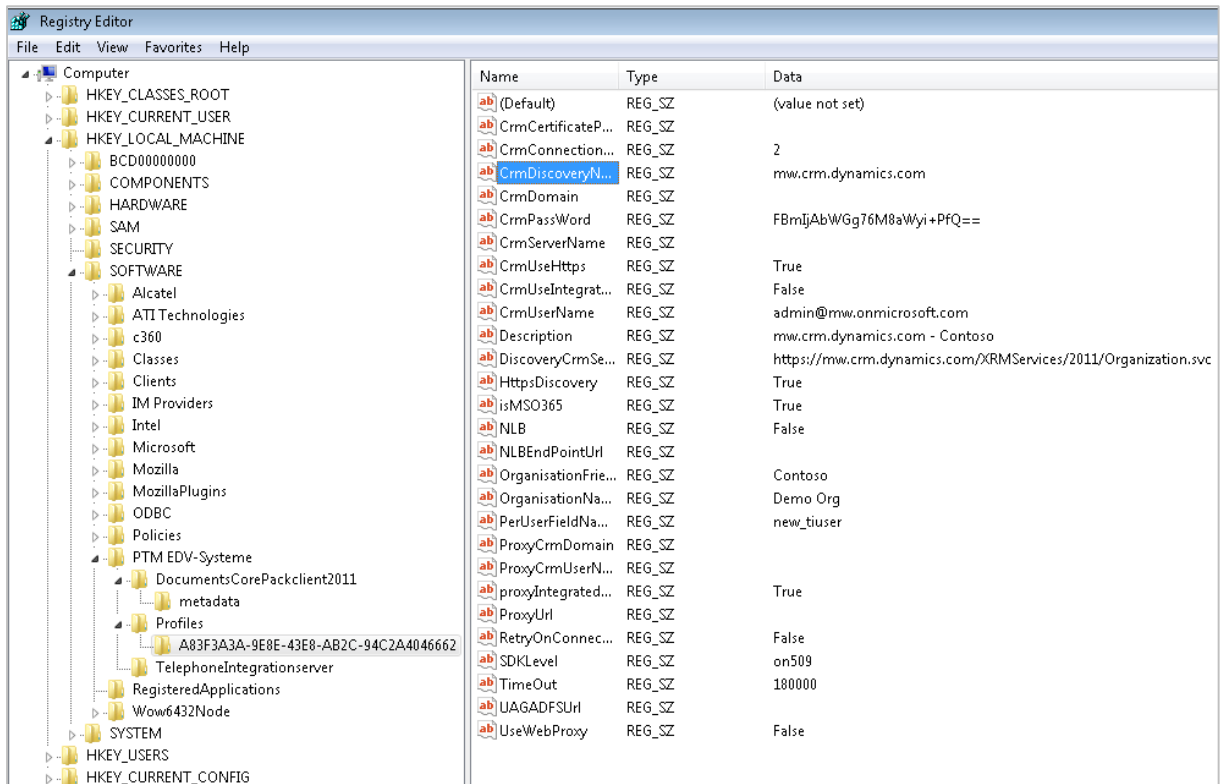
**3)** Now change the existing key from your actual username to e.g. "EnterYourUsername@mw.onmicrosoft.com". It is important that the domain is still the same as for your login (see next screenshot)
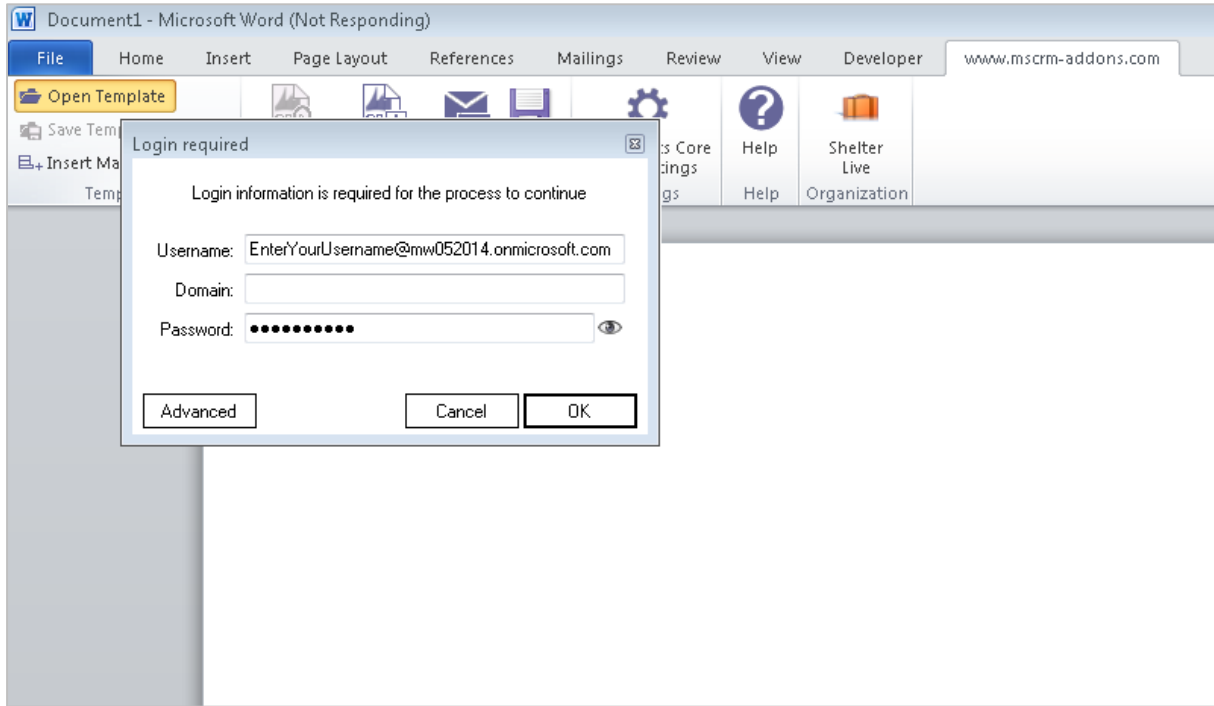


After his step your new profile should look like this:



*Screenshot shows new string.*

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



*Screenshot shows dialog which appears when a different user logs in for the first time on a terminal server using DCP.*

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

## 5.9    Unattended Setup DocumentsCorePack Client for MS CRM 2013

To install the DocumentsCorePack Client for MS CRM 2013 unattended, you need to supply a registry file with the required registry settings. The unattended install is available for the DocumentsCorePack Client Version 5.18 and above.

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

**Download the uai-Template.reg (1.18 kb)**

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

[YOURCRMSERVER:PORT] : The URL of the CRM server without any protocol information, e.g. crm:5555.

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

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

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

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

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

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

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

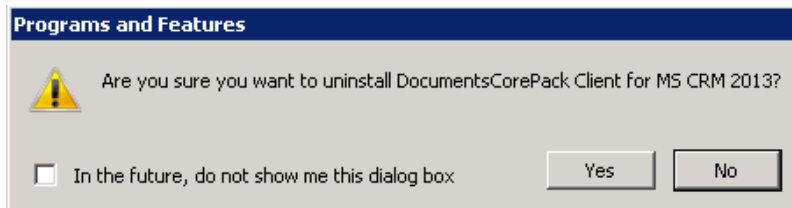# 6 Uninstall DocumentsCorePack Client Component

In order to uninstall DocumentsCorePack Client for MS CRM 2013 select "Programs and Features" in the Control Panel.
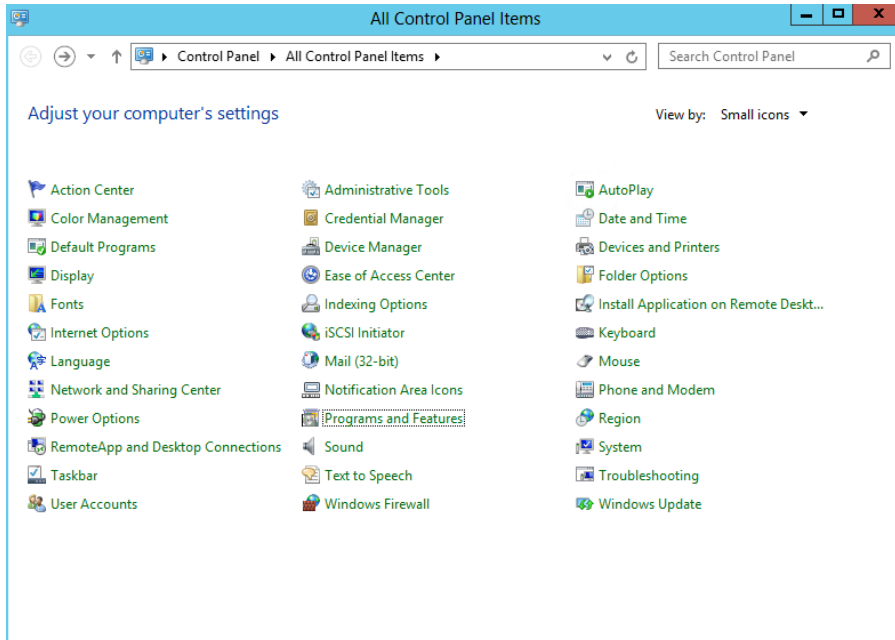


Search for the DocumentsCorePack Client CRM 2013 in "Uninstall or change a program" and click on "Uninstall"
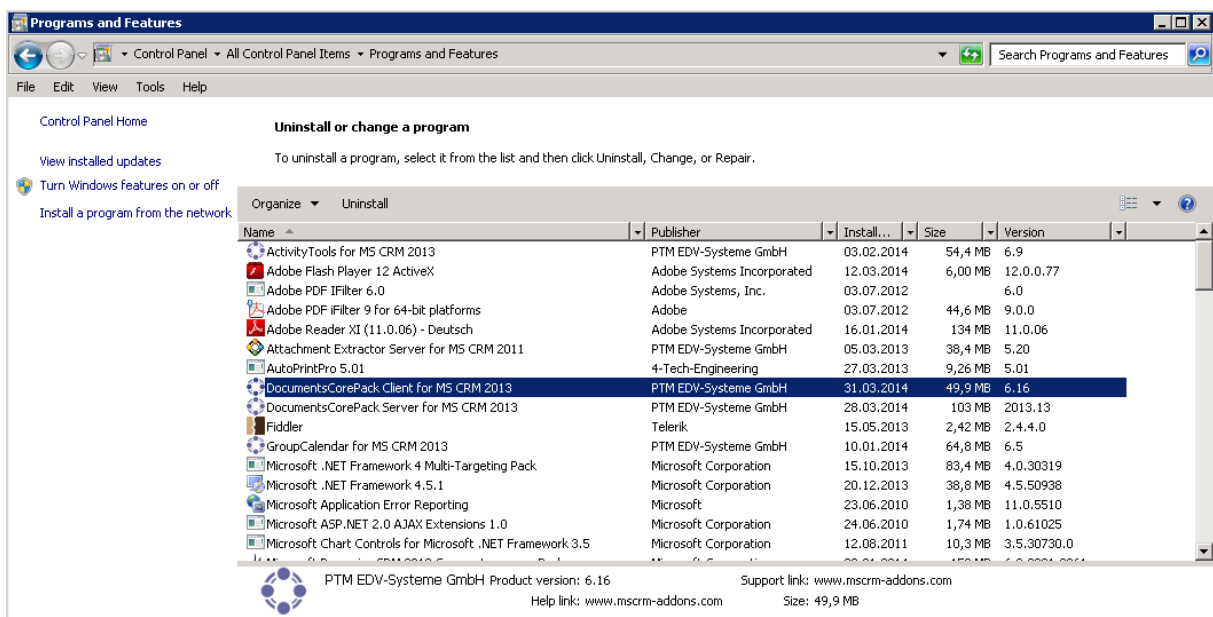
Following window appears:



Click on [Yes] to confirm Uninstall.
Click on [No] to stop the process.

# 7      Contact

If you have questions to the product send an email to
support@mscrm-addons.com
or visit our blog
http://blogs.mscrm-addons.com

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