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AttachmentExtractor for MS Dynamics 365 User Guide

May 2023

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Preamble

This documentation is intended to give detailed explanations of all functionalities provided by AttachmentExtractor in Microsoft CRM 2015/2016 and Dynamics 365.

This guide applies to version 2017.8 or higher.

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

Target Audience

This guide is intended for users working with AttachmentExtractor who have the following minimum skills:

Basic knowledge of Microsoft CRM 2016/2016 and/or Dynamics 365

Basic knowledge of SharePoint, File Share and Azure Blob Storage

Supported Web Browsers and versions

Supported Web Browsers:

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

One of the following versions of Microsoft Dynamics CRM/Dynamics 365 must be available:

- Microsoft Dynamics CRM Server 2015/2016/Dynamics 365
- Microsoft Dynamics CRM Online
- Microsoft Dynamics CRM OnPremise

1. The functionality of the Attachment Extractor

AttachmentExtractor offers you a service-based tool to move attachments and email-content from within Microsoft Dynamics 2015/2016 and/or Dynamics 365 to either a SharePoint location or Azure Blob, saving precious database space in Dynamics 365.

AttachmentExtractor is able to connect to any Microsoft Dynamics CRM 2015/2016 and/or Dynamics 365 (OnPremise, online and hosted) and offers capabilities like extracting email and note attachments, as well as extracting the email .

The service is also available in trial [mode](#).

1.1. How does it work?

AttachmentExtractor requires a separate service for each configured organization.

AttachmentExtractor requires the URL extension to be allowed in Dynamics 365. During the setup, AttachmentExtractor modifies the blocked extensions list in Dynamics 365 and allows URL. The corresponding setting can be found in the system settings of your CRM Organization.

Each service will be listed in the Windows Service Overview separately.

AttachmentExtractor cannot be started directly from the ServiceManagement. The product also installs a heartbeat service, which is monitoring the index services and restarting them if required. (For example, on a server reboot). This service starts automatically when the server is booted and can be controlled via Microsoft Windows ServiceManagement. Alternatively, the services can be launched via the ServiceManagement Application, which is installed with the product.

AttachmentExtractor creates a new application log called www.mscrm-addons.com, in which status, information, errors, and batch process summaries are logged. It is independent of the extended logging features, available in the service configuration panel.

Batches are processed every 100 seconds. With every batch processed, AttachmentExtractor analyses the emails and/or notes, saves the attachment to the configured storage, and replaces the existing attachment with an URL file pointing to the new location. The new attachment is usually less than 500 bytes in size.

In addition, the email or annotation body can be saved to allow indexing and searching in the actual entities' description fields. If you choose to index those entities, the file saved to the external location will also contain some metainformation, for example with an email the subject, from, to, cc, and bcc are also saved into the content file.

1.2. Handling of extracted content

In order to ensure an unchanged user experiences a plugin will automatically stream the extracted content back to Dynamics 365. . Thus, users will not see any difference in accessing files or emails that have been moved.

2. AttachmentExtractor Service Overview

The AttachmentExtractor Service Overview helps you to create and manage services. To open the AttachmentExtractor Service Overview, please look for

ServiceManagement – AttachmentExtractor for Dynamics 365 in your start panel.

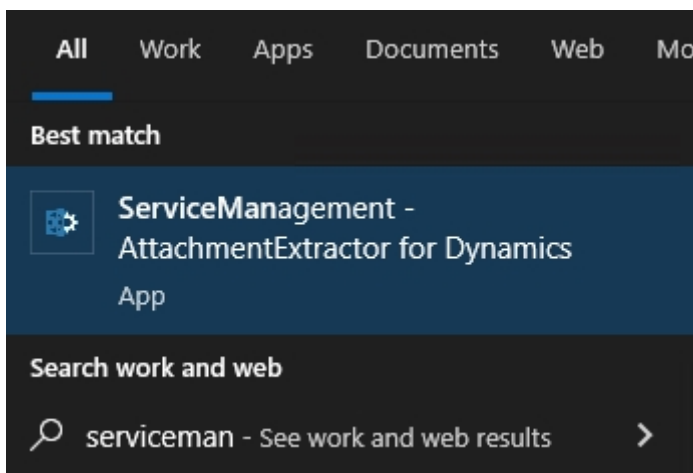


Figure 1: Look for ServiceManagement AttachmentExtractor for Dynamics

The **AttachmentExtractor Service Overview** is shown. Here, you can add and manage extractor services. During the next chapters, we will provide you with information regarding the Service overview.

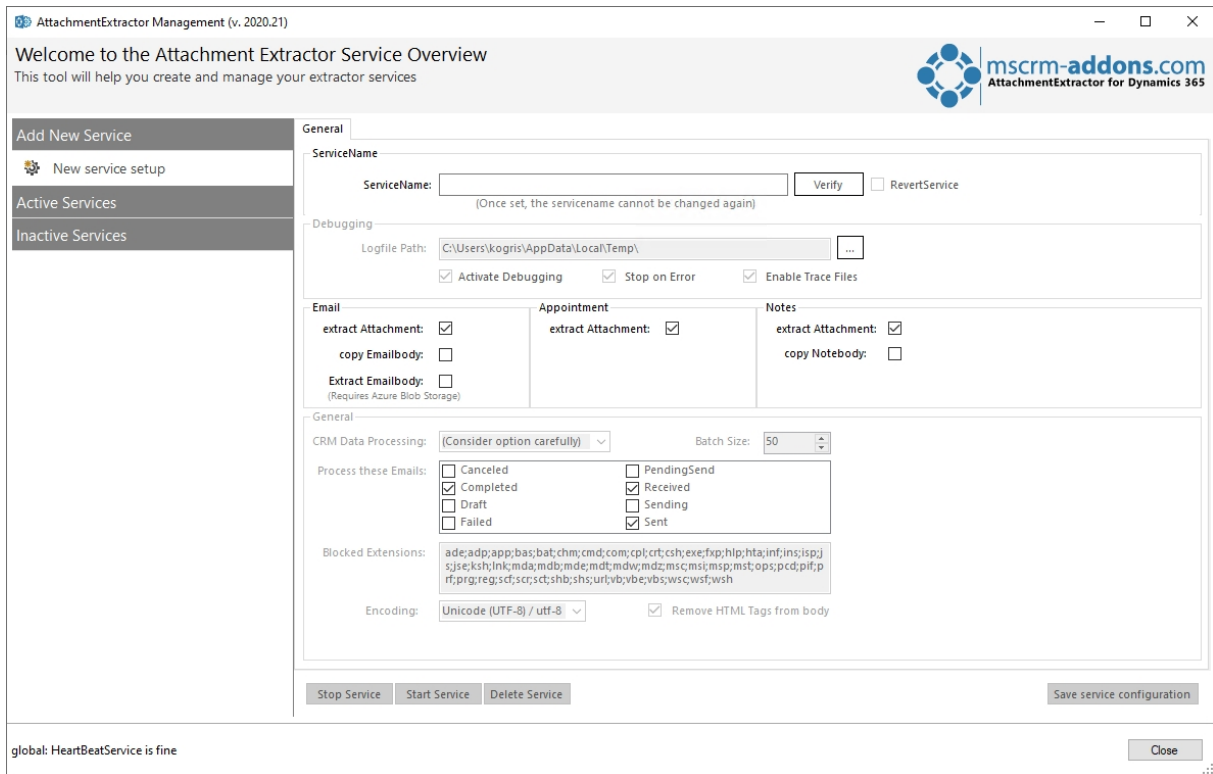


Figure 2: AttachmentExtractor Service Overview

2.1. The Service Overview sections

AttachmentExtractor Service Overview provides you with three sections on the left side.

- 1 **Add New Service:** Start here when you want to create a new service.
- 2 **Active Services:** This tab provides you with a list of all running services.
- 3 **Inactive Services:** This provides you with a list of all inactive services.

AttachmentExtractor Management (v. 2020.21)

Welcome to the Attachment Extractor Service Overview
This tool will help you create and manage your extractor services

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AttachmentExtractor for Dynamics 365

1 Add New Service
New service setup
2 Active Services
3 Inactive Services

General Crm Storage

ServiceName
ServiceName: OnPremiseTest [Verify] RevertService
(Once set, the servicename cannot be changed again)

Debugging
Logfile Path: C:\Users\kognis\AppData\Local\Temp\ [...]
 Activate Debugging Stop on Error Enable Trace Files

Email extract Attachment: copy Emailbody: Extract Emailbody:
(Requires Azure Blob Storage)

Appointment extract Attachment:

Notes extract Attachment: copy Notebody:

General
CRM Data Processing: (Consider option carefully) Batch Size: 50

Process these Emails: Canceled PendingSend Completed Received Draft Sending Failed Sent

Blocked Extensions: ade;adp;app;bas;bat;chm;cmd;com;cpl;crf;csy;exe;fxp;hlp;hta;inf;ins;isp;j
sjs;ksy;lnk;mda;mdb;mde;mdt;mdw;mdz;msc;msi;msp;mst;ops;pcd;pic;p
rf;prg;reg;scf;scr;scst;shb;shs;url;vby;vbs;wsc;wsf;wsh

Encoding: Unicode (UTF-8) / utf-8 Remove HTML Tags from body

Stop Service Start Service Delete Service Save service configuration

global: HeartBeatService is fine [Close]

Figure 3: Service Overview section

3. The Service Overview Tabs

When you have not created a service yet, the AttachmentExtractor Service Overview consists only of the General tab. As soon as you create a service or open an active service, there are more tabs. Within the following chapter, you will be provided with an overview of the different tabs and their functionality.

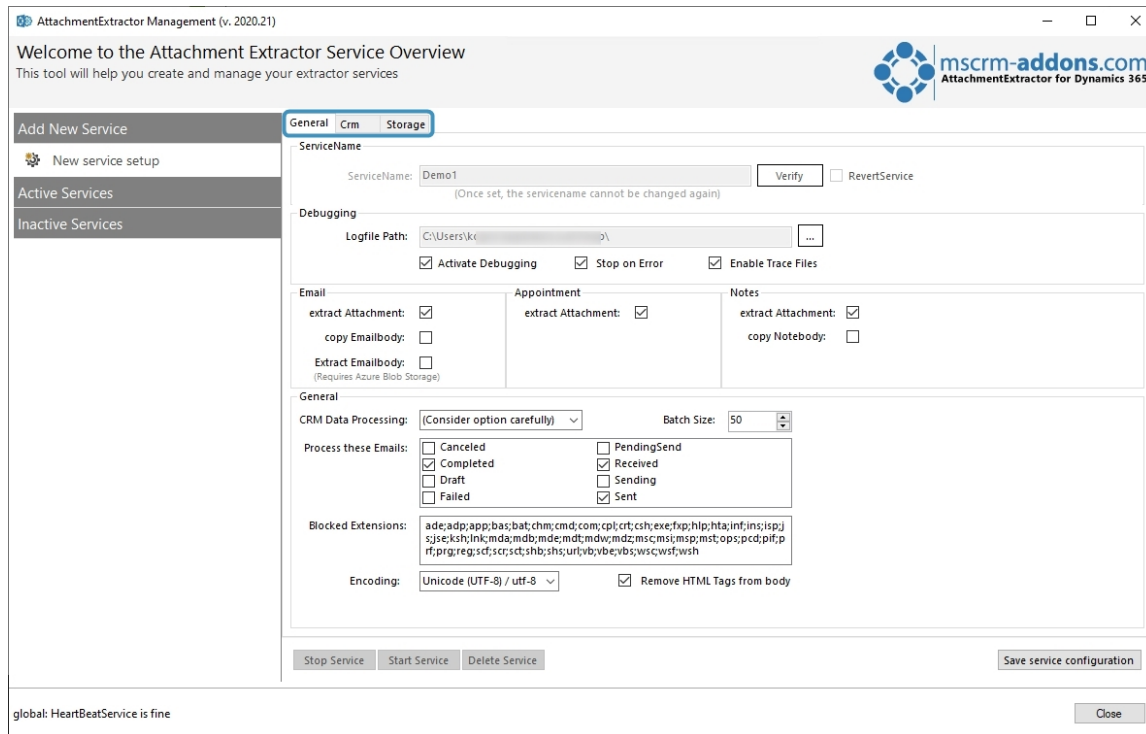


Figure 4: Service tabs after creating a service

3.1. The General Tab

The General tab provides you with the opportunity to set the general settings of your future service.

1 Service Name: Enter a service name for your future service here. Click on the **Verify** button to check if the name is still available. You also have the possibility to clone your service as a revert service.

Please note: When creating a new service, it is recommended to name it descriptively. Once set, that name cannot be changed anymore.

2 Debugging: AttachmentExtractor offers separate debugging options for each configured service. To enable debugging for a specific service, you need to specify a logfile path. Click on the [...] button to change it. Check the Activate Debugging checkbox if you want to activate debugging.

Please note: If the service for which you want to enable debugging is already running, you must stop the service before you can change the configuration.

Checking the **Stop on Error** checkbox shuts the service down on non-critical errors.

3 Email: This field determines which parts of the emails should be extracted. You can extract the attachment and/or the email body by checking the corresponding boxes.

4 Appointment: This field determines which parts of the appointments should be extracted. You can extract the attachment by checking the corresponding box.

5 Notes: This field determines which parts of the notes should be extracted. You can extract the attachment and/or the note body by checking the corresponding boxes.

6 CRM Data Processing: By using the drop-down menu of this section, you can decide how to proceed with your extracted data. Select COPY to keep all Dynamics 365 data or select MOVE to replace data in Dynamics 365.

Please note: Once you have moved data, the step cannot be undone anymore!

7 Batch Size: This field enables you to set the number of items to be processed per step.

8 Select the states an email must have to be processed. You can select between the following states: **Canceled, Completed, Draft, Failed, PendingSend, Received, Sending** and **Sent**.

Please note: Depending on your Dynamics 365 setup, several states enforce a **read-only** state on the email. Please be aware that the draft status will likely extract the attachment before the email is sent.

9 Blocked Extensions: Please insert the filetypes that should be blocked from extraction here. Please be aware of the fact that Dynamics 365 does NOT extract links by default.

10 The Service buttons: Use the service buttons to configure your service. The **Stop Service** button stops a running service. You can start a service again with a click on the **Stop Service** button. When you click on the **Delete Service** button, you delete a service. Please consider the last step carefully because you cannot undo this action.

11 The extraction & Save buttons: The **Revert Extraction** button reverts previously extracted data, while a click on the **Reset Extraction** button resets the extraction process. Click on **Save service configuration** to save your settings.

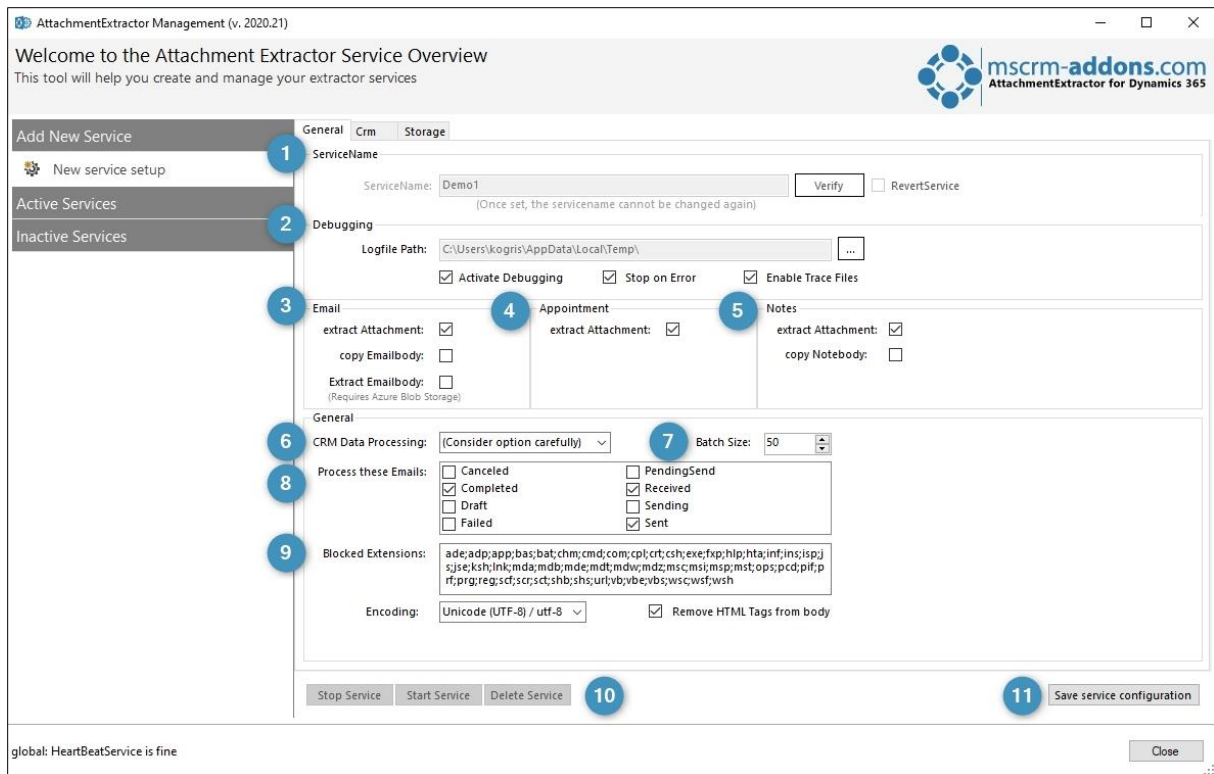


Figure 5: Service overview - General tab

3.2. The CRM Connection Setup Tab

- 1 **Dynamics 365 Type:** Select the Dynamics 365 Type you want to use here.
- 2 **Dynamics 365 Server-URL:** Enter the URL of the Dynamics 365-Server you want to use here.
- 3 **Authenticated as:** Decide if you want to use default Credentials (Not recommended, because the service is running as **Network-Service**.) or if you want to log on with other credentials (always use administrator).
- 4 **Retrieve all:** Get all Organizations from the previously selected Dynamics 365-Server.
- 5 **Organization information:** Friendly name, unique name and ServiceURL of each Organization are displayed in this section.

Have a look at our [Connection Dialog documentation](#) for further information on the Connection dialog.

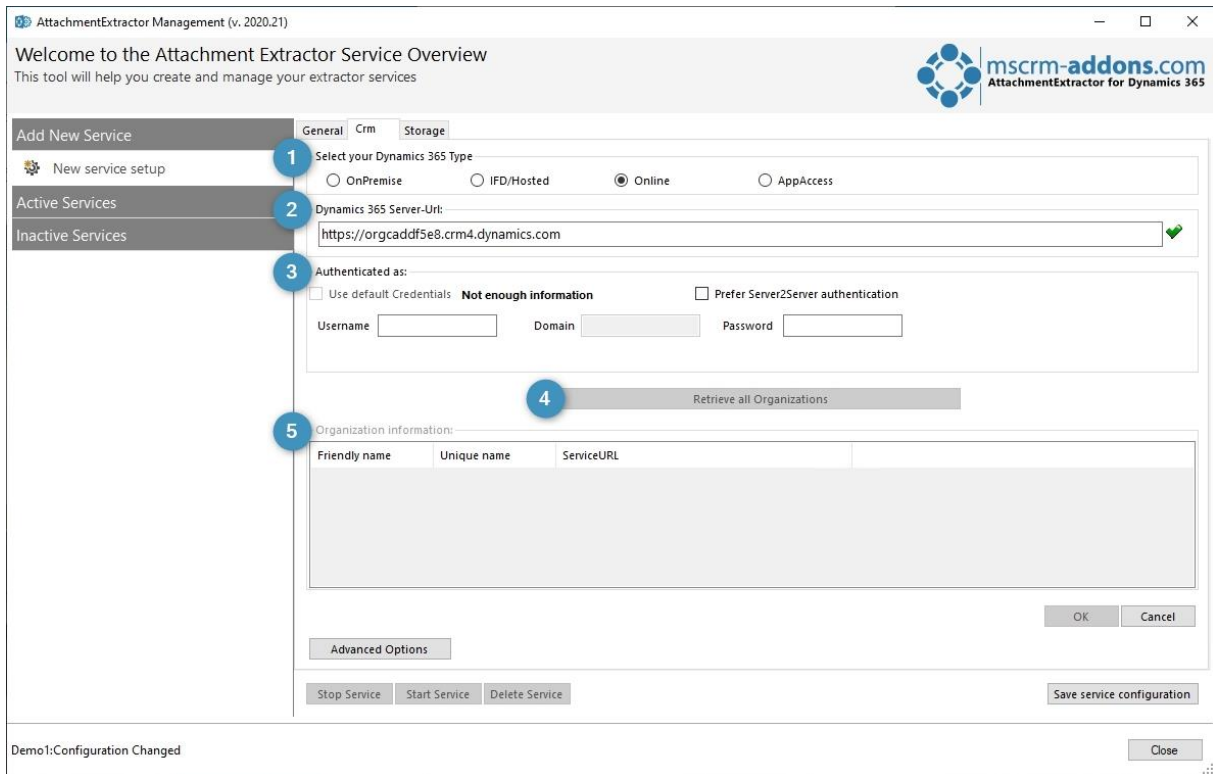


Figure 6: Service Management - CRM Connection Setup

3.3. The Storage Options Tab

Using the drop-down menu, you can select if you want to extract your files to SharePoint, a Fileshare or AzureBlobStorage.

1 SharePoint

- **SharePoint Server:** Enter your SharePoint server here. Browse through your sites and libraries to specify the storage location.
- **Username & Password:** Please enter the username and password of the SharePoint user here.
- **ADFS Server:** Please enter your ADFS Server here.
- **HomeRealm Url:** Enter the governing ADFS address for HomeRealm discovery-enabled scenarios. If you don't know, if you are having one, you very likely don't.

Use the **Connect to SharePoint** button to establish a connection with SharePoint

2 FileShare

- **Internal Path:** This is how the service accesses the files for writing. Be aware, that the service is running under a network/system user per default and might not see the same drive & shares as the logged-on user. Select the local storage path. Click on the [...] button to select one.

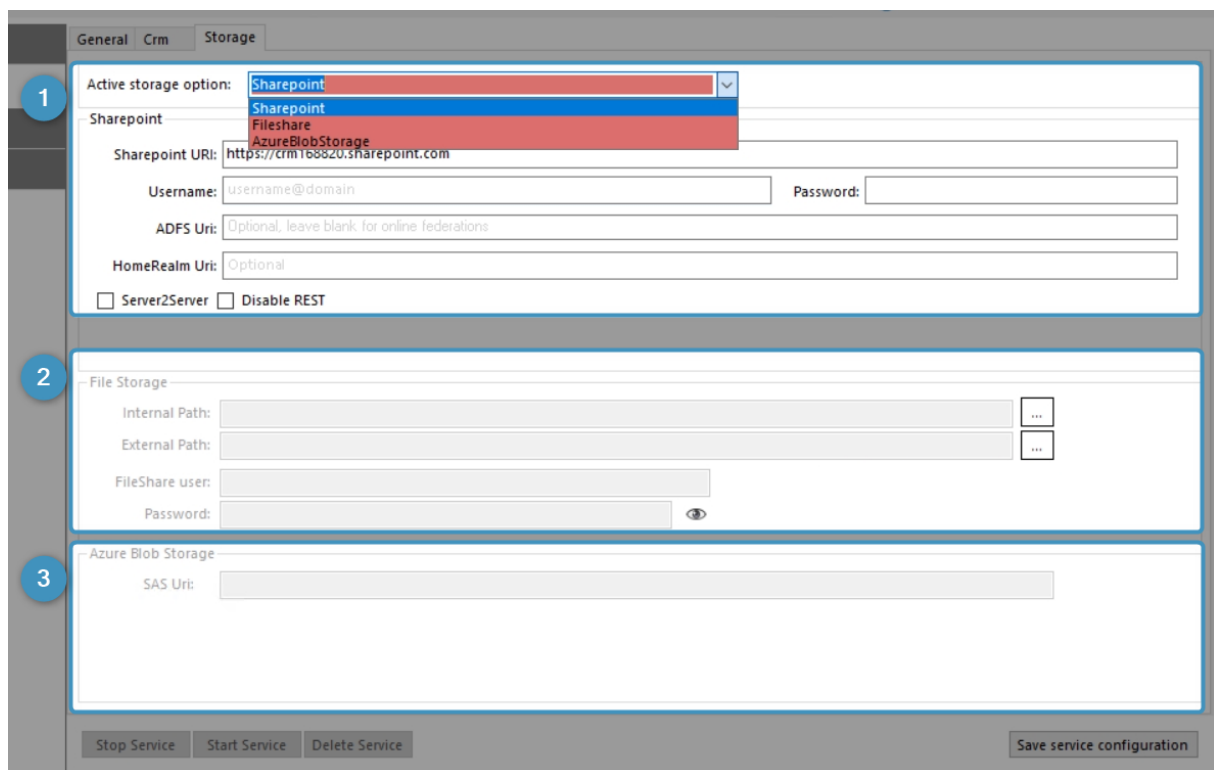
- **External Path:** Select the external storage path (the path, the user would take). Click on the [...] button to select one.

Please note: The internal and external paths must point to the physically identical location.

- **FileShare user:** Please enter the username of the FileShare user.
- **Please note:** This is the user the service is impersonating as to write to the FileShare. If no user is supplied, the write access will be performed as the user running the service.
- **Password:** Please enter the password of the FileShare user (click on the eye to see the unencrypted password).
- **Treat external path as template:**

3 AzureBlobStorage: Starting with version 2017.8 AttachmentExtractor supports Azure Blob Storage. Azure Blob Storage is a service for storing large amounts of unstructured object data, such as text or binary data. It only offers flat storage without saving attributes. This means there is no hierarchy, everything will be stored in one folder.

- **SAS Url:** Provides direct access to a specific resource in a cloud service, such as Azure Blob Storage or Azure File Storage, along with the necessary permissions and time-bound access. The URL includes all the necessary access information, making it easier to share and use. Learn [here](#) more.



The screenshot shows the 'Storage' configuration window with three numbered callouts:

- 1** Active storage option: Sharepoint (dropdown menu)
- 2** File Storage section with fields for Internal Path, External Path, FileShare user, and Password.
- 3** Azure Blob Storage section with a field for SAS Uri.

Figure 7: Service Overview - Storage Options

3.4. The Integration Tab

1 Sharepoint Integration Options

- **Enable CRM SharePoint Integration:** Enable this option and AttachmentExtractor will save the files to the regarding entities location for emails or to the owning entities location for annotations.
- **Create locations on SharePoint:** Enable this option to allow AttachmentExtractor to create document locations for the related entities.
- **Create locations with GUID suffix:** Enable this option to create folders synchronously with CRM 2015 folder creation logic.

2 **Define subfolder names:** Here you can define the names of your subfolder for emails or for notes. You are allowed to use maximum of 14 chars – only letters and numbers.

3 **Handling of entities with no regarding or regarding without document management:** Entities with no regarding or without document management, but with regarding can be managed here. Simply check the box that displays best how you want to proceed with these entities.

AttachmentExtractor supports CRM integrated Document Management, saving documents in the same location as CRM would do (The document location is determined by the regarding field for emails and by the owning entity for notes).

The AttachmentExtractor creates a weekly or daily subfolder, based on the created date of an item for items without regarding or regarding items without document management enabled in Dynamics 365. This feature is optional!

4 **SharePoint Attributes:** If you want to create SharePoint attributes, you can do so here. Attributes are optional and add additional information to each Dynamics 365 item on SharePoint. However, enabling this option will slow down the extraction process.

- **CrmBackLink:** Containing a link to the actual Dynamics 365 item
- **EntityGuid:** The unique ID of the item
- **EntityTypename:** The name of the Entity in Dynamics 365
- **IsCrmRecord:** Indicating if this item is an actual Dynamics 365 record or an attachment
- **LinkGuid:** Containing the GUID and TypeName as a CSV list for the attributes specified below
- **LinkData:** Containing the display values for the attributes specified below
- **EntityDate:** The created-on date of the item in Dynamics 365

A comma-separated list of the following items is saved into the SharePoint attributes. The attributes are separated by a semicolon:

For Email: "from", "to", "cc", "bcc", "subject", "regardingobjectid"

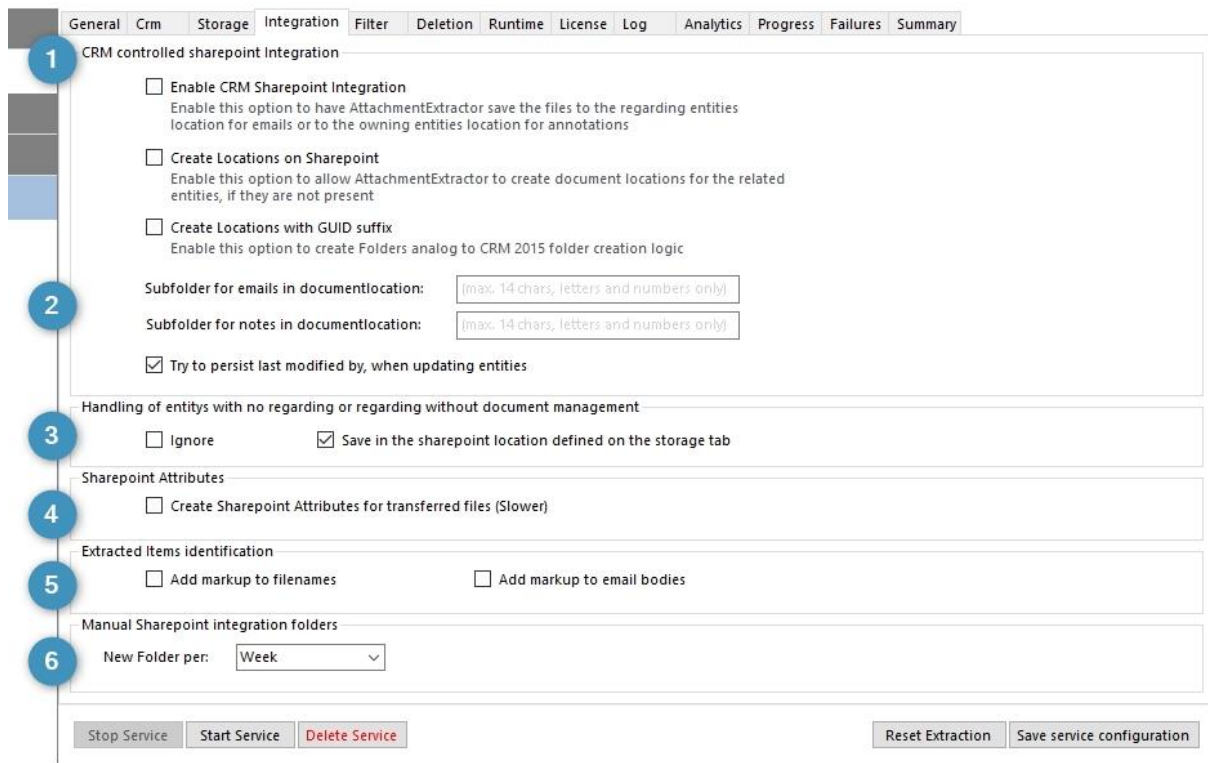
For Annotation (Note): "subject", "filename", "filesize", "notetext", "objectid"

Please note: The attributes are set for both, the attachments and the actual entity.

5 Extracted Items identification:

- **Add markup to filenames:** Adds a “_extracted” markup to every attachment that was moved. This allows to identify extracted content within Dynamics 365
- **Add markup to emailbodies:** Adds a “Moved to Azure Blob Storage” markup to every email that was moved. This allows to identify extracted emails within Dynamics 365

6 Manual SharePoint Integration folders: This option defines if the SharePoint integration folders should be created once a week or once a day.



The screenshot shows the 'Integration' tab of a service configuration page. It features a navigation bar with tabs: General, Crm, Storage, Integration, Filter, Deletion, Runtime, License, Log, Analytics, Progress, Failures, Summary. The main content area is divided into several sections, each with a numbered callout:

- 1 CRM controlled sharepoint Integration:** Contains three checkboxes: 'Enable CRM Sharepoint Integration' (with subtext: 'Enable this option to have AttachmentExtractor save the files to the regarding entities location for emails or to the owning entities location for annotations'), 'Create Locations on Sharepoint' (with subtext: 'Enable this option to allow AttachmentExtractor to create document locations for the related entities, if they are not present'), and 'Create Locations with GUID suffix' (with subtext: 'Enable this option to create Folders analog to CRM 2015 folder creation logic').
- 2 Subfolder for emails in documentlocation:** A text input field with a placeholder '(max. 14 chars, letters and numbers only)'. Below it is another similar field for 'Subfolder for notes in documentlocation:'. A checkbox 'Try to persist last modified by, when updating entities' is checked.
- 3 Handling of entys with no regarding or regarding without document management:** Two checkboxes: 'Ignore' and 'Save in the sharepoint location defined on the storage tab' (which is checked).
- 4 Sharepoint Attributes:** A checkbox 'Create Sharepoint Attributes for transferred files (Slower)'.
- 5 Extracted Items identification:** Two checkboxes: 'Add markup to filenames' and 'Add markup to email bodies'.
- 6 Manual Sharepoint integration folders:** A dropdown menu for 'New Folder per:' set to 'Week'.

At the bottom, there are buttons for 'Stop Service', 'Start Service', 'Delete Service', 'Reset Extraction', and 'Save service configuration'.

Figure 8: Service Overview – Integration

3.5. Filter

1 Attachment Size Filter: Set the attachment size filter to define what size an attached file must have to be extracted by this service. If you want to extract as many files as possible, it is recommended to use a very small size.

2 Entitytype Filter:

- **Excluded Entities (BlackList):** Check this checkbox to extract the email/Note attachment and save it as a file.
- **Included Entities (Whitelist):** Contains a list of entities, which notes will ALWAYS be processed by the Extraction. Leave this field empty to process any entity. You also have the possibility to select filtered views, which you can create in Dynamics 365. Please note, that the additional processing required for filtered views will have an impact on the overall performance

3 Restrictions: Use this area to set time restrictions on the extraction of your notes and emails.

4 Ownership – include items owned by: You can filter by user, teams, and business units. Only items owned by this user will be extracted and is queried with an OR condition.

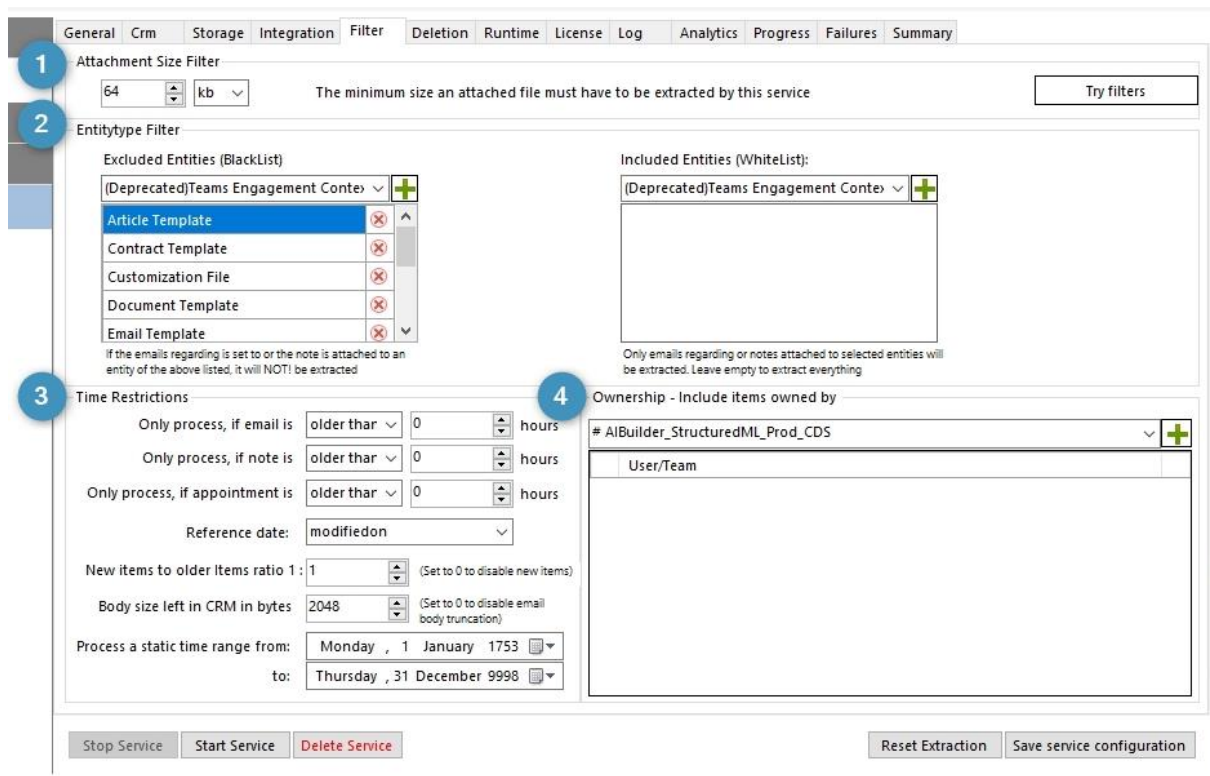


Figure 9: Service Overview – Filter

3.6. The Deletion Tab

DELETION SETTINGS

- **Max. Attachment Size Backup folder:** Define the maximum attachment size here.
- **Backup folder:** Select a folder location into which you would like to back up your data.
- **Patterns:** Only files that contain the expressions inserted into this box will be flagged for deletion.

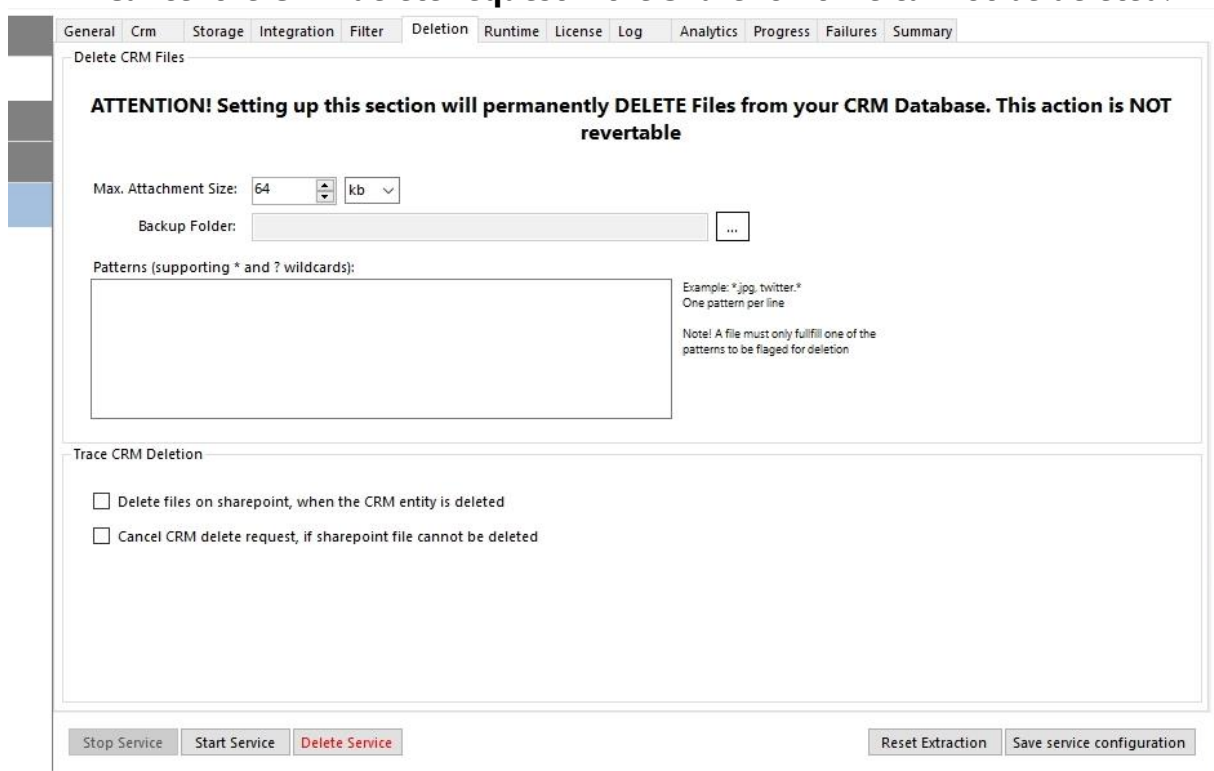
Please note: Once set, this section will PERMANENTLY delete files from your database. This action is NOT reversible!

- **Trace CRM Deletion.** It is possible to:
 - **Delete files on SharePoint, when the CRM entity is deleted:** If you are checking this checkbox, AttachmentExtractor is capable of cascading delete requests in Dynamics 365 to extracted files, which means that it enables the plugin to delete items on SharePoint/Azure Blob Storage.

Settings required: `EnableCascadeDelete`

Value: `true`

- **Cancel the CRM delete request if the SharePoint file cannot be deleted.**



The screenshot shows the 'Deletion' tab in a service overview interface. The tab is titled 'Delete CRM Files' and contains a warning: 'ATTENTION! Setting up this section will permanently DELETE Files from your CRM Database. This action is NOT revertable'. Below the warning, there are three main sections:

- Max. Attachment Size:** A dropdown menu set to '64' and a unit selector set to 'kb'.
- Backup Folder:** A text input field with a browse button ('...').
- Patterns (supporting * and ? wildcards):** A large text area for entering patterns. To the right, there is an example: 'Example: *.jpg, *.twitter.*' and a note: 'Note! A file must only fulfill one of the patterns to be flagged for deletion'.

Below these sections is the 'Trace CRM Deletion' section, which contains two checkboxes:

- Delete files on sharepoint, when the CRM entity is deleted
- Cancel CRM delete request, if sharepoint file cannot be deleted

At the bottom of the interface, there are buttons for 'Stop Service', 'Start Service', 'Delete Service', 'Reset Extraction', and 'Save service configuration'.

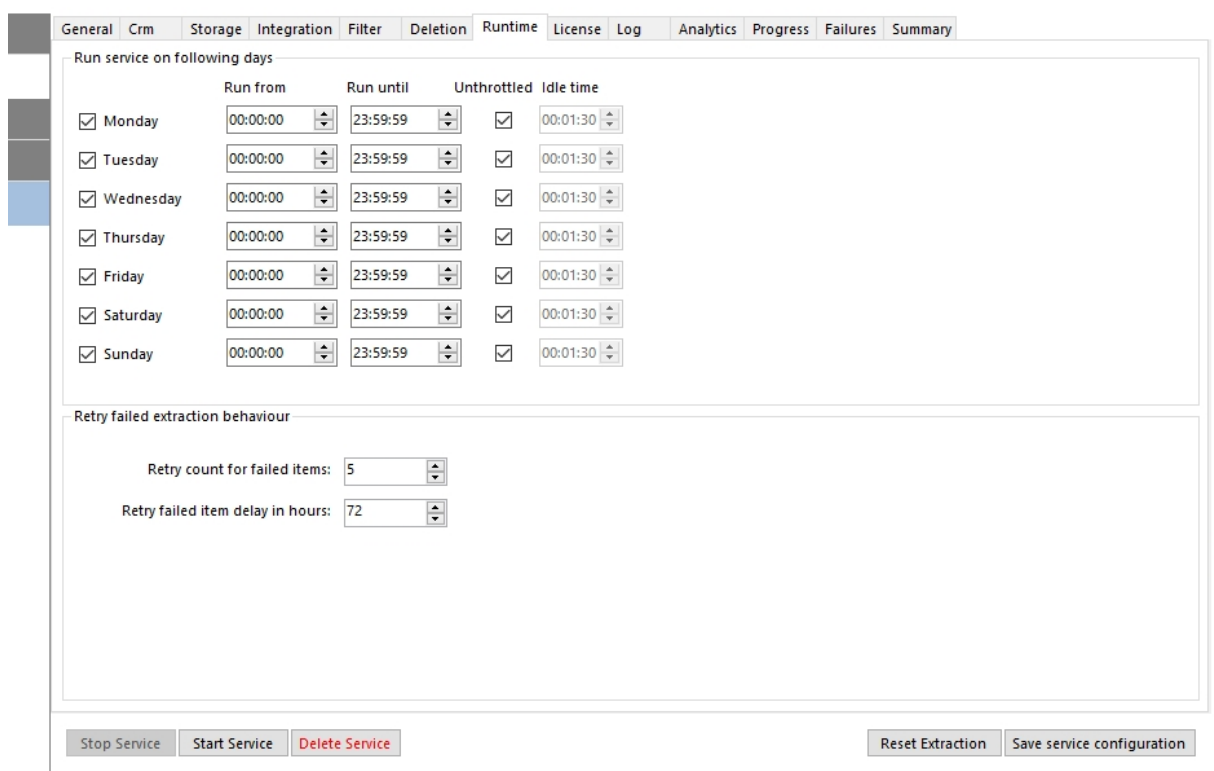
Figure 10: Service Overview – Deletion

3.7. The Runtime Tab

Supported by the functionalities of this tab, you can specify the runtime of your service.

Specify, on which weekday(s) and when exactly the service should run by checking the checkboxes next to the weekday and by setting a certain time/period. AttachmentExtractor is smart enough to figure out that, running your service on Monday from 11pm to 7am, is actually running from midnight to 7am and from 11pm till midnight.

- **Unthrottled:** By checking this checkbox, you have the possibility to run your service non-braked.
- **Idle time:** Define an idle time so that other services also get time on the server.
- **Retry count for failed items:** Define the number of attempts to retry your failed items.
- **Retry failed item delay in hours:** You have the possibility to set in how many hours the retry should start for the first time and retry the failed five times.



The screenshot shows the 'Runtime' tab of the 'Service Overview' interface. It features a navigation bar with tabs: General, Crm, Storage, Integration, Filter, Deletion, Runtime (selected), License, Log, Analytics, Progress, Failures, and Summary. The main content area is divided into two sections:

Run service on following days

	Run from	Run until	Unthrottled	Idle time
<input checked="" type="checkbox"/> Monday	00:00:00	23:59:59	<input checked="" type="checkbox"/>	00:01:30
<input checked="" type="checkbox"/> Tuesday	00:00:00	23:59:59	<input checked="" type="checkbox"/>	00:01:30
<input checked="" type="checkbox"/> Wednesday	00:00:00	23:59:59	<input checked="" type="checkbox"/>	00:01:30
<input checked="" type="checkbox"/> Thursday	00:00:00	23:59:59	<input checked="" type="checkbox"/>	00:01:30
<input checked="" type="checkbox"/> Friday	00:00:00	23:59:59	<input checked="" type="checkbox"/>	00:01:30
<input checked="" type="checkbox"/> Saturday	00:00:00	23:59:59	<input checked="" type="checkbox"/>	00:01:30
<input checked="" type="checkbox"/> Sunday	00:00:00	23:59:59	<input checked="" type="checkbox"/>	00:01:30

Retry failed extraction behaviour

Retry count for failed items: 5

Retry failed item delay in hours: 72

At the bottom, there are buttons for 'Stop Service', 'Start Service', 'Delete Service', 'Reset Extraction', and 'Save service configuration'.

Figure 11: Service Overview - Runtime

3.8. License

This overview enables you to quickly check your license state. If the license is invalid, the service will not start. For more information on the license manager, please have a brief look at our [Licensing Guide](#).

Please note: When in trial mode, the service will stop after each processed batch of items. The processing batch size is limited to 25 items per cycle and a maximum of 500 items is supported in total.

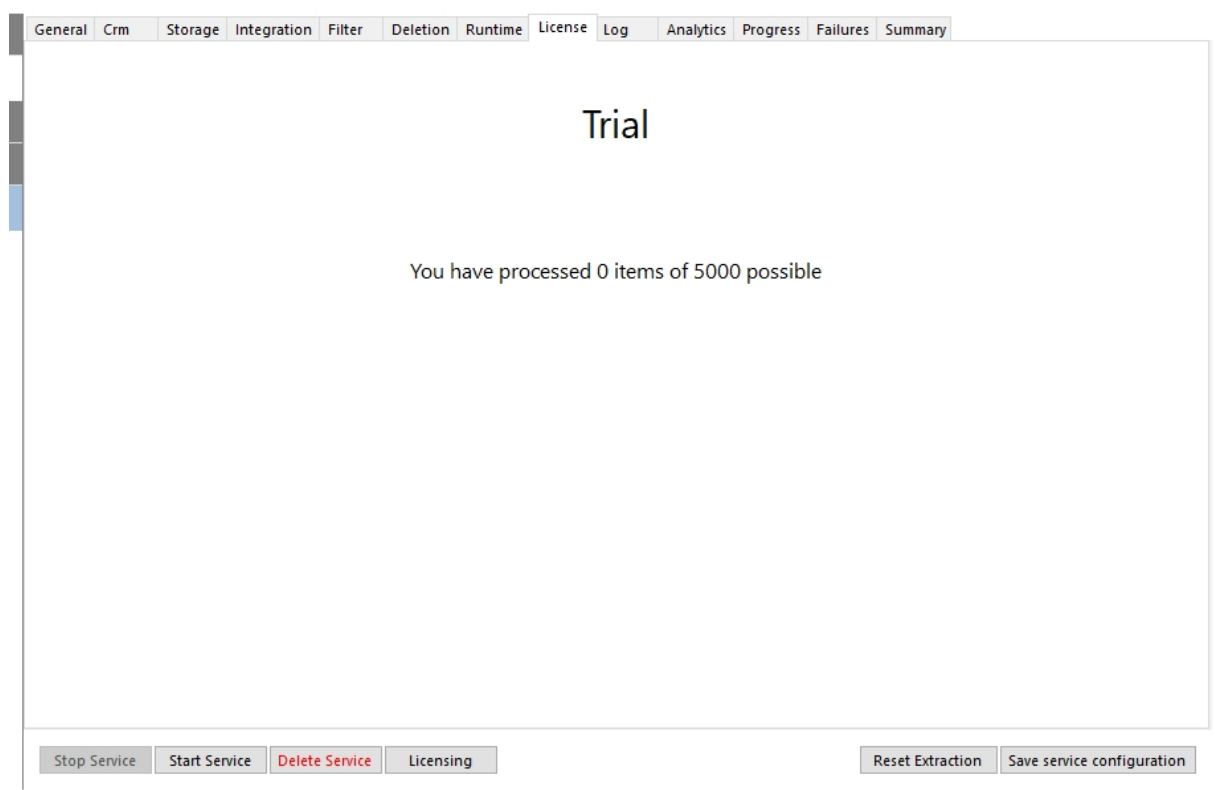


Figure 12: Service Overview - License

3.9. Log

The log provides an excerpt of the AttachmentExtractor event log, filtered for this specific service. This helps you to identify any issues with the service.

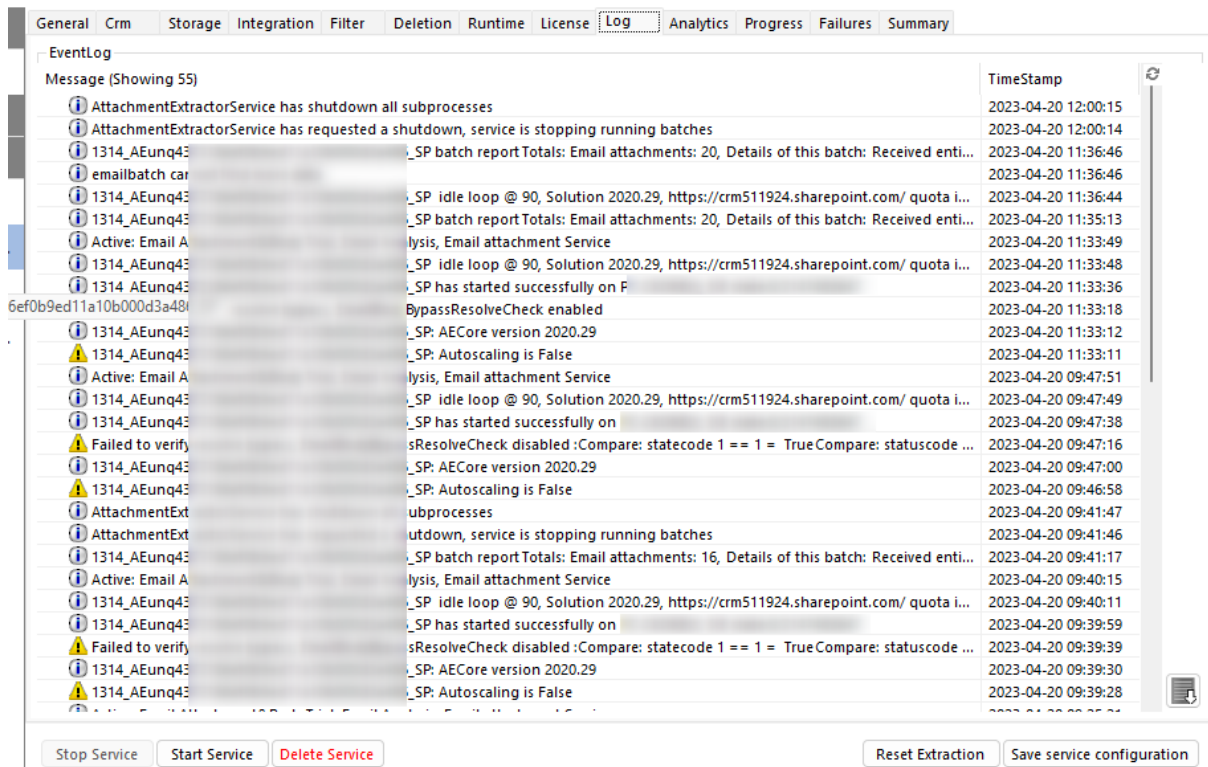


Figure 13: Service Overview – Log

Double-clicking on an entry in the list brings up the full description in a message box, like you can see in the figure below.

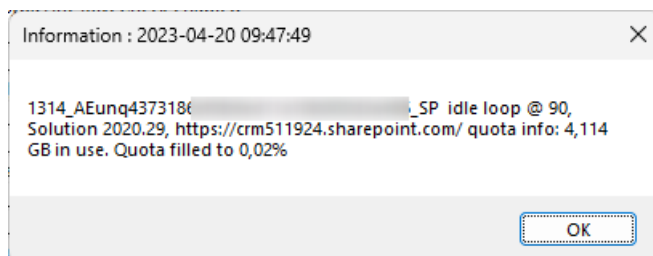
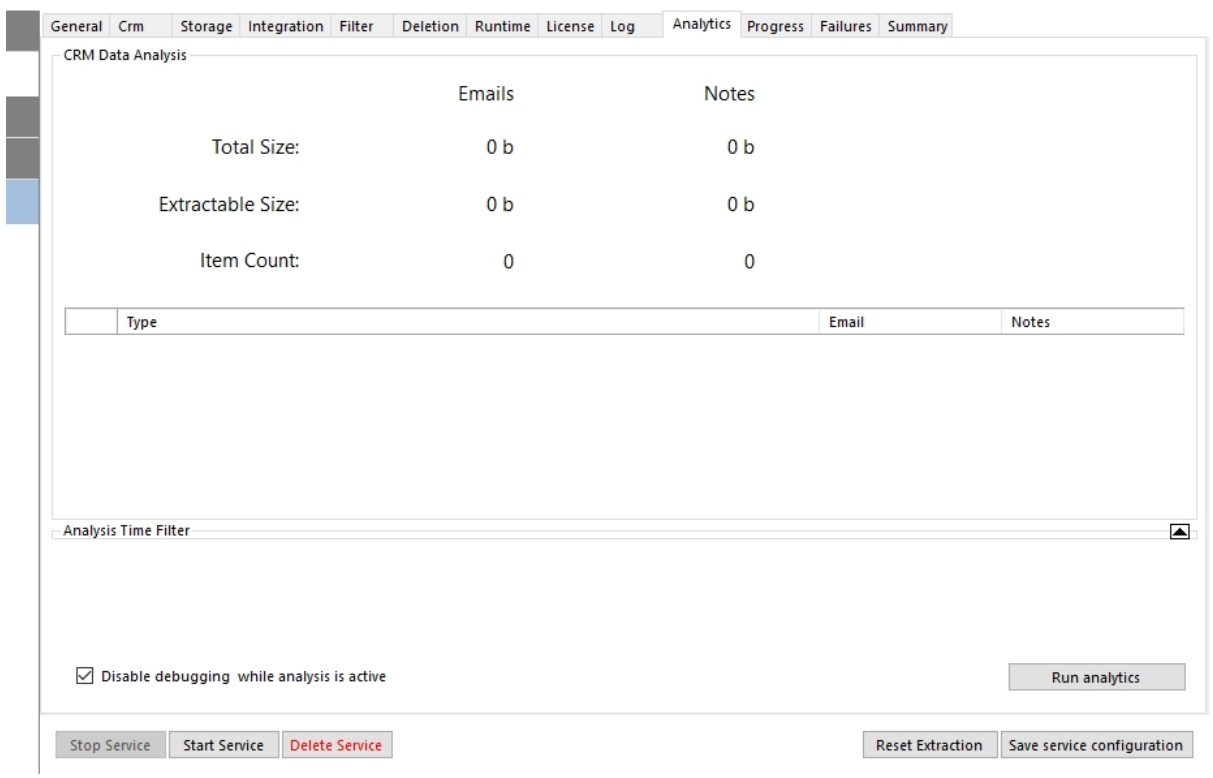


Figure 14: Example Log

3.10. Analytics

CRM Data Analysis: Get an overview of your CRM data analysis here. Hit the **Run analytics** button to get the progress of your service at a glimpse. The total size, the extractable size, the counted items, and the types of your items will be displayed.

It is possible to disable debugging while analysis is active by checking the checkbox.



The screenshot shows the 'Analytics' tab in the Service Overview. It features a 'CRM Data Analysis' section with a table showing 'Emails' and 'Notes' statistics. Below this is an 'Analysis Time Filter' section and a 'Run analytics' button. At the bottom, there are buttons for 'Stop Service', 'Start Service', 'Delete Service', 'Reset Extraction', and 'Save service configuration'.

	Emails	Notes
Total Size:	0 b	0 b
Extractable Size:	0 b	0 b
Item Count:	0	0

Type	Email	Notes

Disable debugging while analysis is active

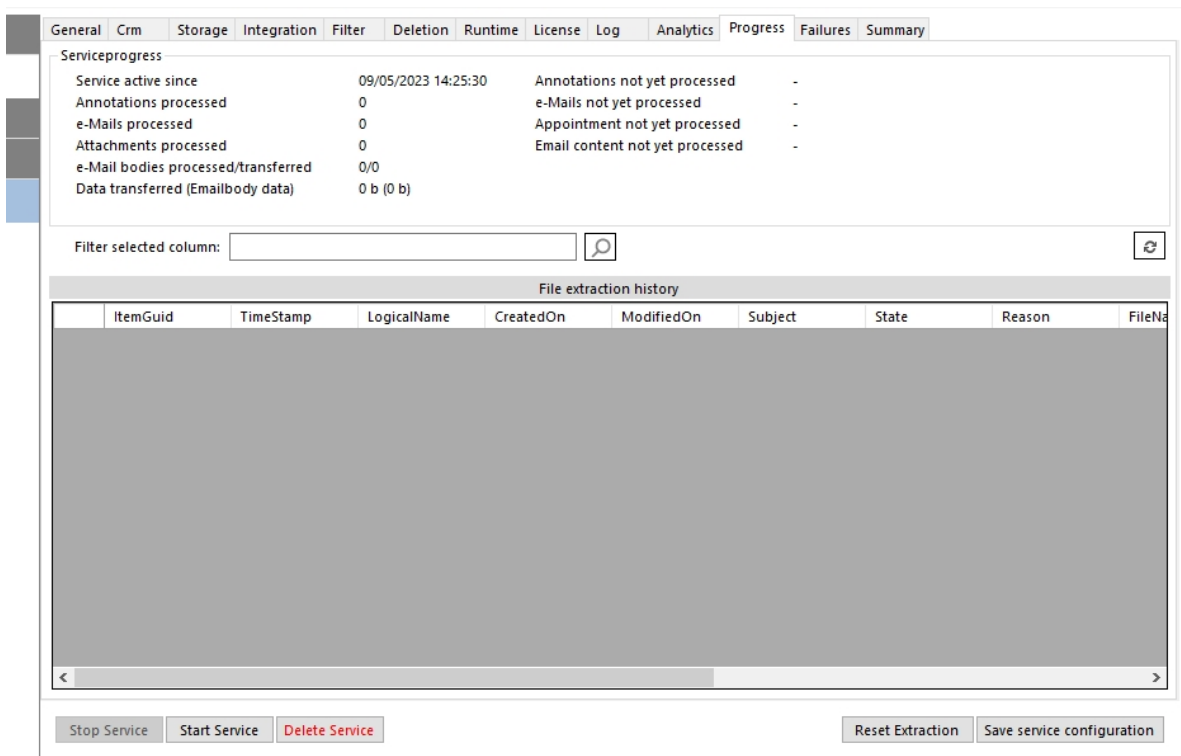
Run analytics

Stop Service Start Service Delete Service Reset Extraction Save service configuration

Figure 15: Service Overview _ Analytics

3.11. Progress

Serviceprogress: Check the progress of your service here to get an overview of your file extraction history.



The screenshot shows the 'Progress' tab in the Service Overview. It displays a 'Serviceprogress' section with a table of service statistics. Below this is a 'Filter selected column:' input field and a 'File extraction history' table with columns for ItemGuid, TimeStamp, LogicalName, CreatedOn, ModifiedOn, Subject, State, Reason, and FileName. At the bottom, there are buttons for 'Stop Service', 'Start Service', 'Delete Service', 'Reset Extraction', and 'Save service configuration'.

Service active since	09/05/2023 14:25:30	Annotations not yet processed	-
Annotations processed	0	e-Mails not yet processed	-
e-Mails processed	0	Appointment not yet processed	-
Attachments processed	0	Email content not yet processed	-
e-Mail bodies processed/transferred	0/0		
Data transferred (Emailbody data)	0 b (0 b)		

Filter selected column:

ItemGuid	TimeStamp	LogicalName	CreatedOn	ModifiedOn	Subject	State	Reason	FileName

Stop Service Start Service Delete Service Reset Extraction Save service configuration

Figure 16: Service Overview: Progress

3.12. Failures

The **Failures** tab provides you with the Failure history of your failed items. You have the possibility to retry failed items by hitting the **Retry all failed items** button. Retry enabled the service to retry all items that have already failed more than the set times on the Runtime-tab.

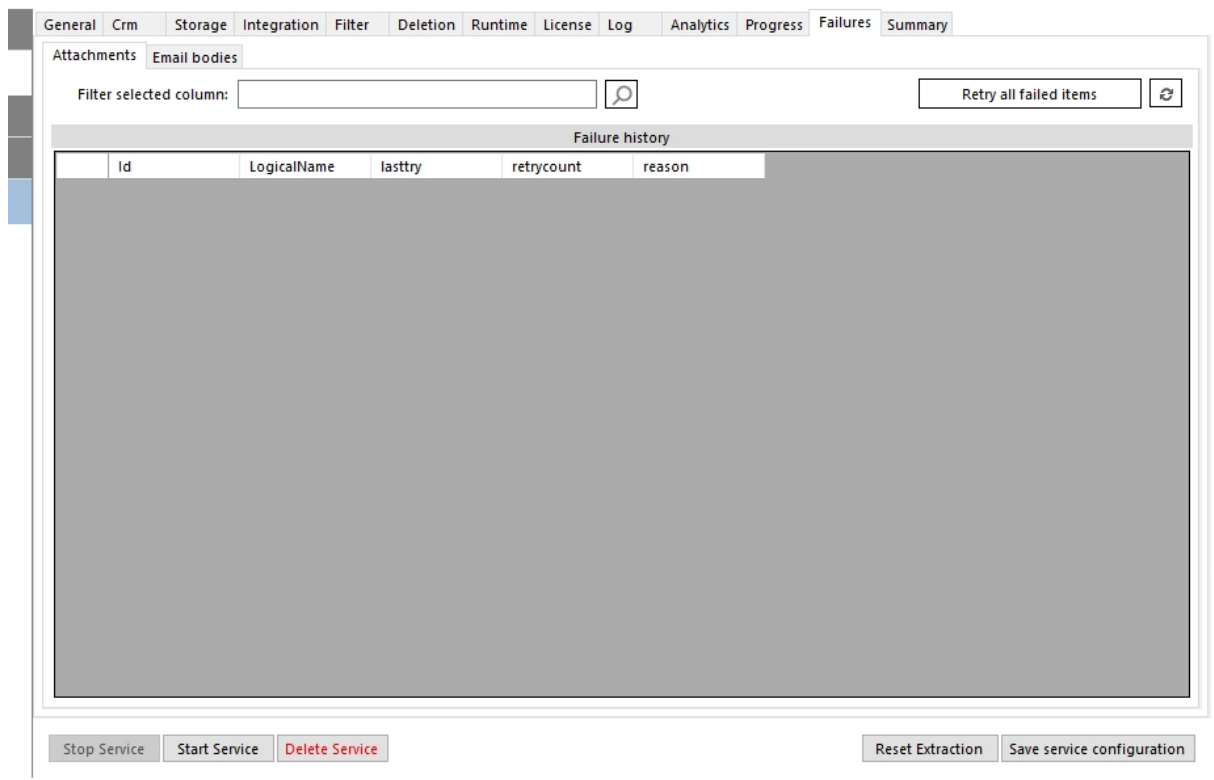


Figure 17 Service Overview - Failures

3.13. Summary

The **Summary** tab displays you the configuration structured in a tree diagram like you can see in the figure below. You can export your Log-files as a .ZIP document, which contains the service overview and the latest logs and the event log. Therefore, please hit the **Export** button (highlighted).

Please note: This ZIP-file is very important for support requests!

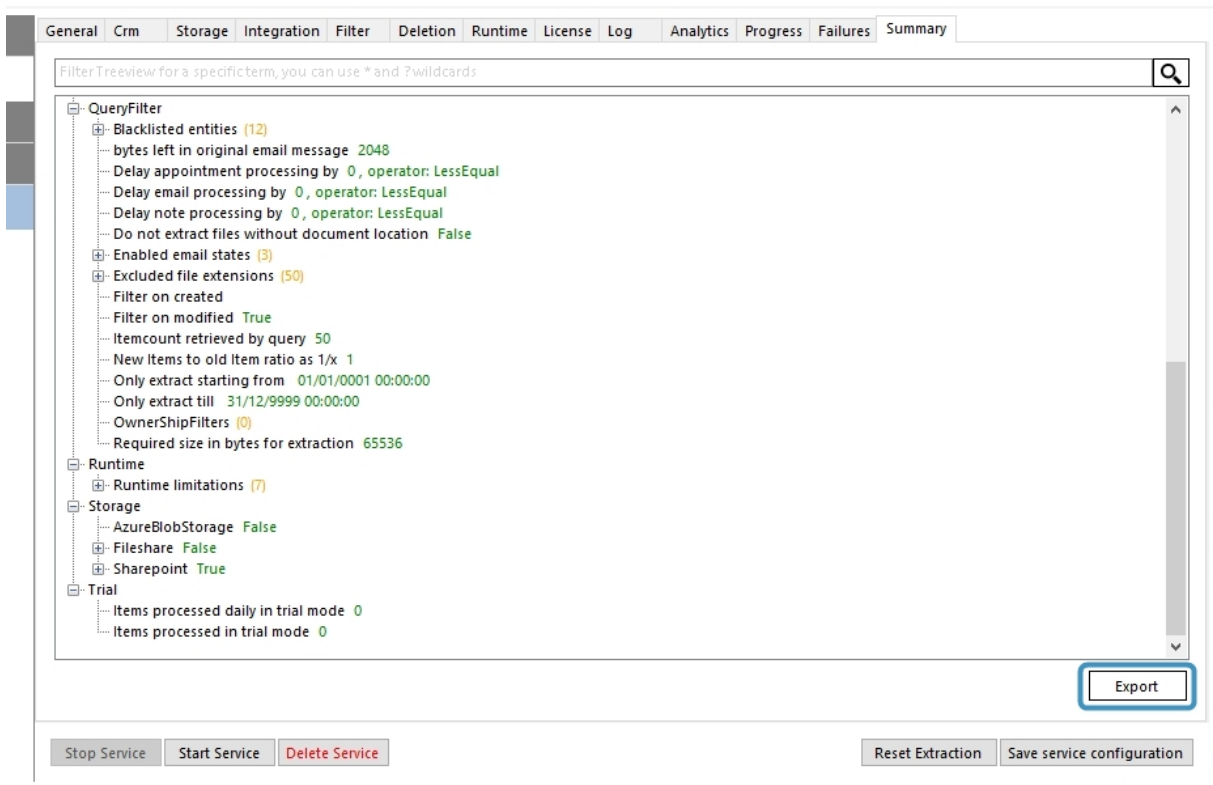


Figure 18: Service Overview – Summary

The ZIP-file contains usually more than two files, like shown in our simple example. Depending on the debug status, this could have around 15-20 files. The intention is to help our support team to find issues and have all information in place.

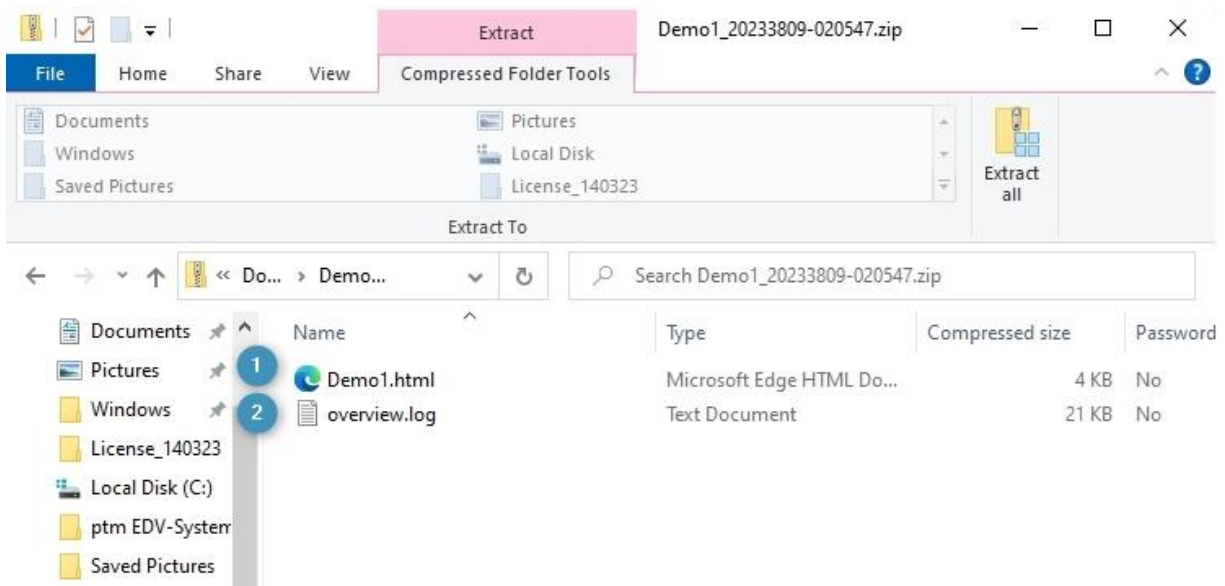


Figure 19: Service Overview .zip file

1 **Demo1.html:** If you open this file, you will be provided with a structured service overview where you can find all information to your newly created service, like you can see below.

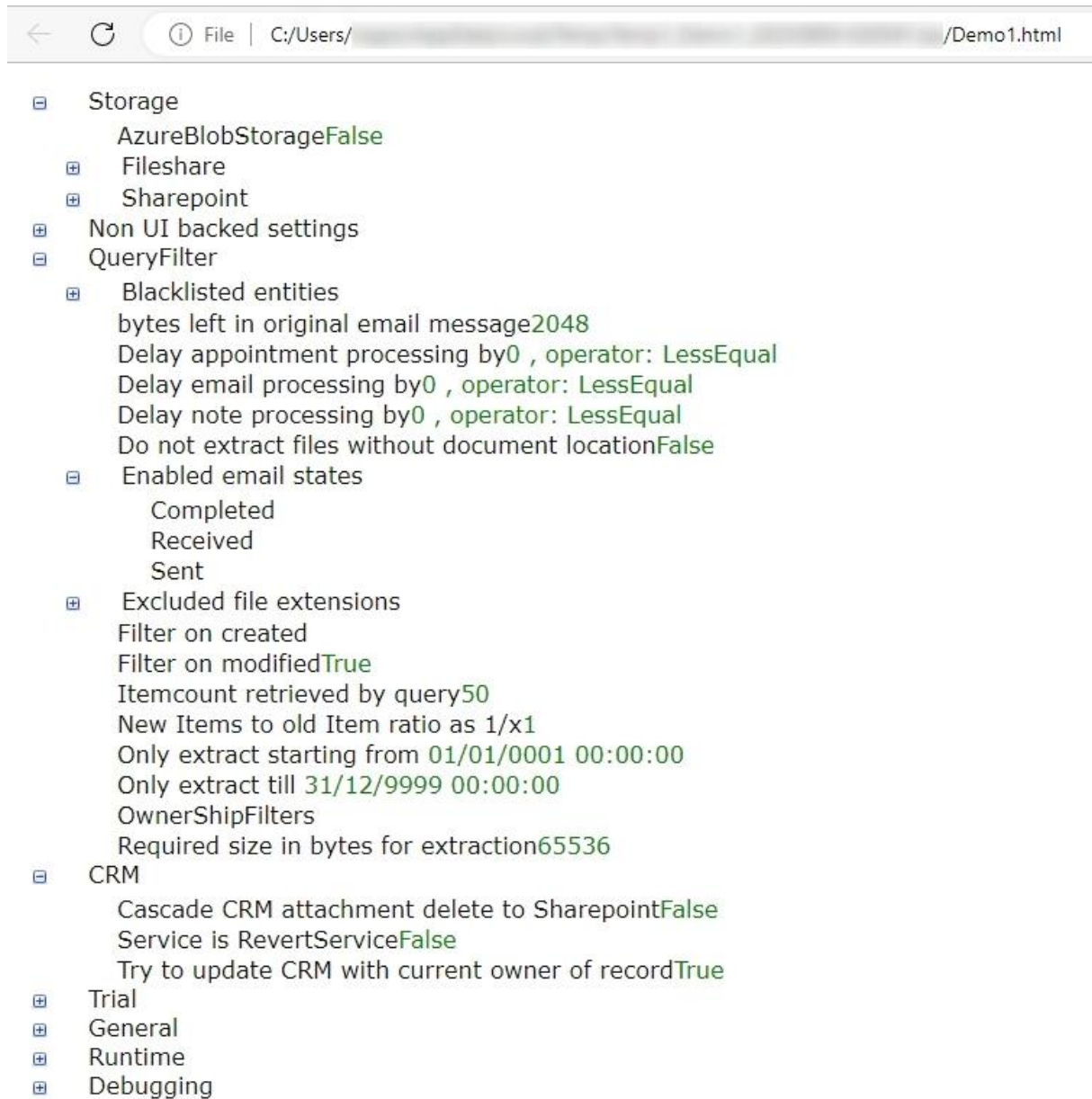


Figure 20: Demo1.html

2 overview.log: The log overview of the service configuration helps you to identify any issue with this service.

```

overview.log - Notepad
File Edit Format View Help
***** CONFIGURATION START *****
SingleItemErrorCount(System.Int32) :0
SingleItemErrorThreshold(System.Int32) :2147483647
EnforceUniqueSPFileNames(System.Boolean) :False
StorageMode(AttachmentExtractorService.Configuration+eStorage) :Sharepoint
SharepointStorageEnabled(System.Boolean) :True
FileStorageEnabled(System.Boolean) :False
BlobStorageEnabled(System.Boolean) :False
Legacy_SP_SiteCollection(System.String) :
Legacy_SP_Path(System.String) :
Legacy_SP_PathByName(System.String) :
Legacy_SP_ServerName(System.String) :
VerifyLocationContext(System.Boolean) :False
UseSPRestAPI(System.Boolean) :False
CutCRMFileName(System.Boolean) :False
EnableLocalTMCache(System.Boolean) :False
PersistsQueueRelation(System.Boolean) :False
FilterOnModified(System.Boolean) :True
FilterOnCreated(System.Boolean) :False
IsFixedDateRange(System.Boolean) :False
FixedDateRangeStart(System.DateTime) :01/01/0001 00:00:00
FixedDateRangeEnd(System.DateTime) :31/12/9999 00:00:00
QueryDateTimeReferenceField(System.String) :modifiedon
CompanionFileTemplate(System.String) :
CompanionFileUnrelatedTemplate(System.String) :
CompanionFileLookupStructureCSV(System.String) :
SkipFilesWithoutExtension(System.Boolean) :True
AllowSingleItemAnalysis(System.Boolean) :True
CompanionFileLookupStructure(System.Collections.Generic.Dictionary`2[System.String,System.String]) :System
ExternalPathIsTemplate(System.Boolean) :False
CatchAllContact(System.String) :
SkipUnrelatedFilesForMFiles(System.Boolean) :True
SharepointControlConfiguration(System.String) :k2/mT172e0aVamRADQLP3KYw8Xn8FRNKnS150Qmsr8Hmv61n7AjLs/HP9A;
kGdACkaDjtRo1kYNiPGRGqSxEb/BBE8IbMpF7/XzGNVDDWGqHsXlJeGb06K7gEhcEccLhjbsAq0uAzIaL3Sht/DziCXY6X9ubqbQ1NN5/I
N+JZ1+SAEaTLoIhJS0AwJD3JWwCsNS6N83GoLZje5sXRPqLcXixGC09JdiUt1mVR3vYQpnN5JRcSPfnXR2Gx+BIKESB1YVhodZieUFMnZ;
+1twK9kc6jzMNvza6ns+uwSuUUM6vALL98342IAeay6Y1kwUzdSQ03+SItGACgXFzD3ZHsFi7SmGVkn14NUslt+YvGa+vp2K3f/VoxxD;
HYbMd5XcjB88jYWgXWuQdBubvIt3Cn0d2+rD6BtWGi07w9XN5r3Jids2wtJwJHQw9QWhUFeYiLAI1sAeISDV3Z5Xt/m5LHxmv1Xphrur;
LTkmb62ncwFG1Z1nghswZYQ2SwgKi/VCW04UgObmUZPyZeV/a7ECALhiW/P8yrbE54IFVaX5K0m7AKpCG13D9wdDzqWnrDNJx2i8R5xgel
/A+pEg7pxitjmtHFrdi5LNUpZpN5sZbJqEKN8QBpdc00R9uXxG+PXGXISPIOPpia4bPn8wvBHXgqMRd40IUaLNCafxC1LnjDP+V50ZJp;
xoJfSh+H1mTsvTQCeYrC/xDRQXdVvdkjDatz54nCfCjaK7nX2k8nme1pwp1vXyxR0HttrI4poQ0+bcwRGjw3mr/AUNCj1q07iANoI0o5'
vHtWk9+e1fv5uKlRaeiwRzEgnatKYuDJDyoeRYzR7ck09KvLPAHn1uA7HKYhwcalhukwM2gn1ocHSHM/nj3fY5vWwv7iRH17umfATV?M
<

```

Figure 21: The Overview log

4. How-To's

This section provides you with some useful Tutorials on how to work with AttachmentExtractor.

4.1. How to create a service in AttachmentExtractor

It does not need much to start a service in AttachmentExtractor. To do so, simply open the AttachmentExtractor ServiceManagement in the start pane.

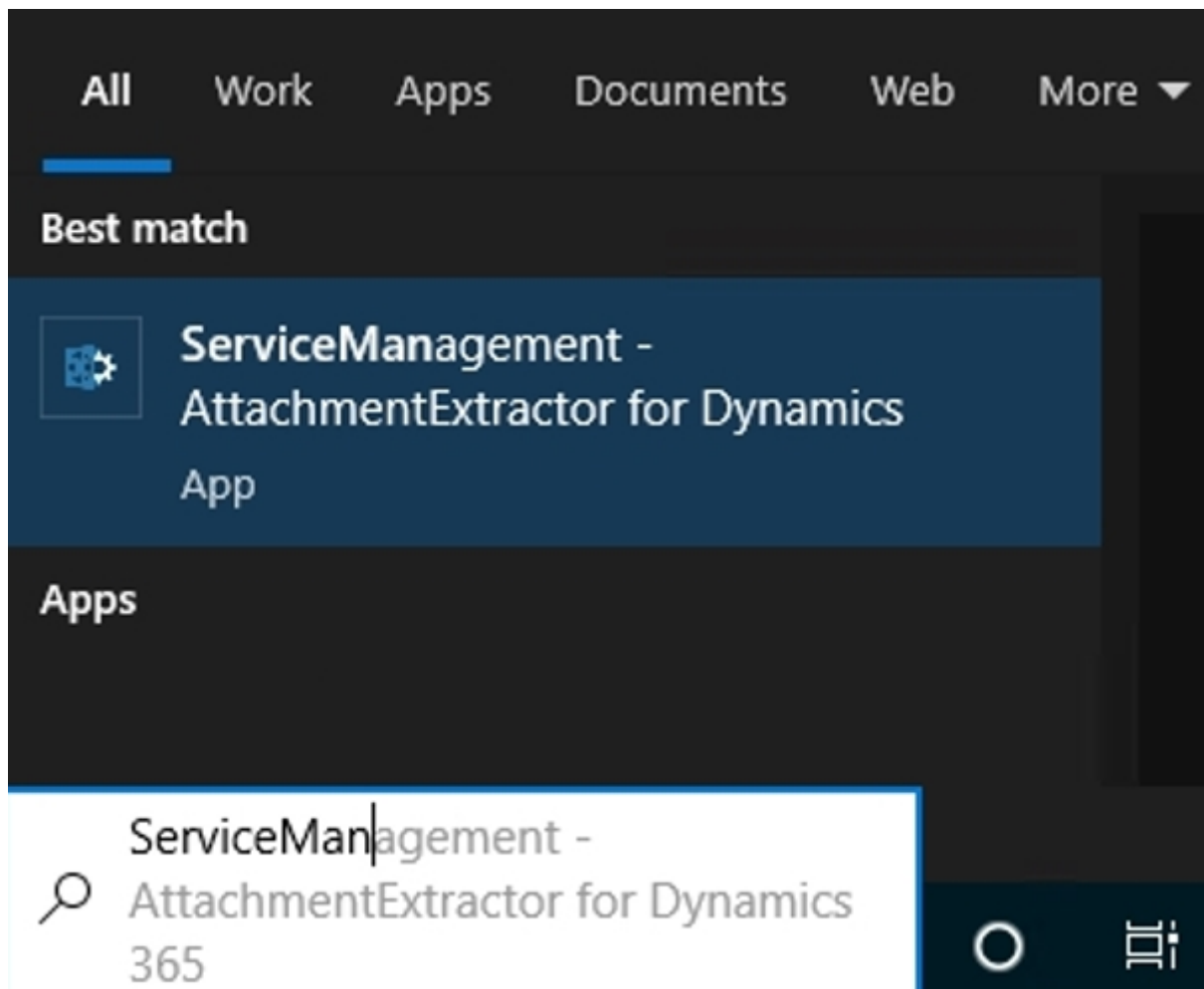


Figure 22: Start Pane - ServiceManagement AttachmentExtractor

This opens the AttachmentExtractor Service Overview. Click on **1 New service setup** on the left side.

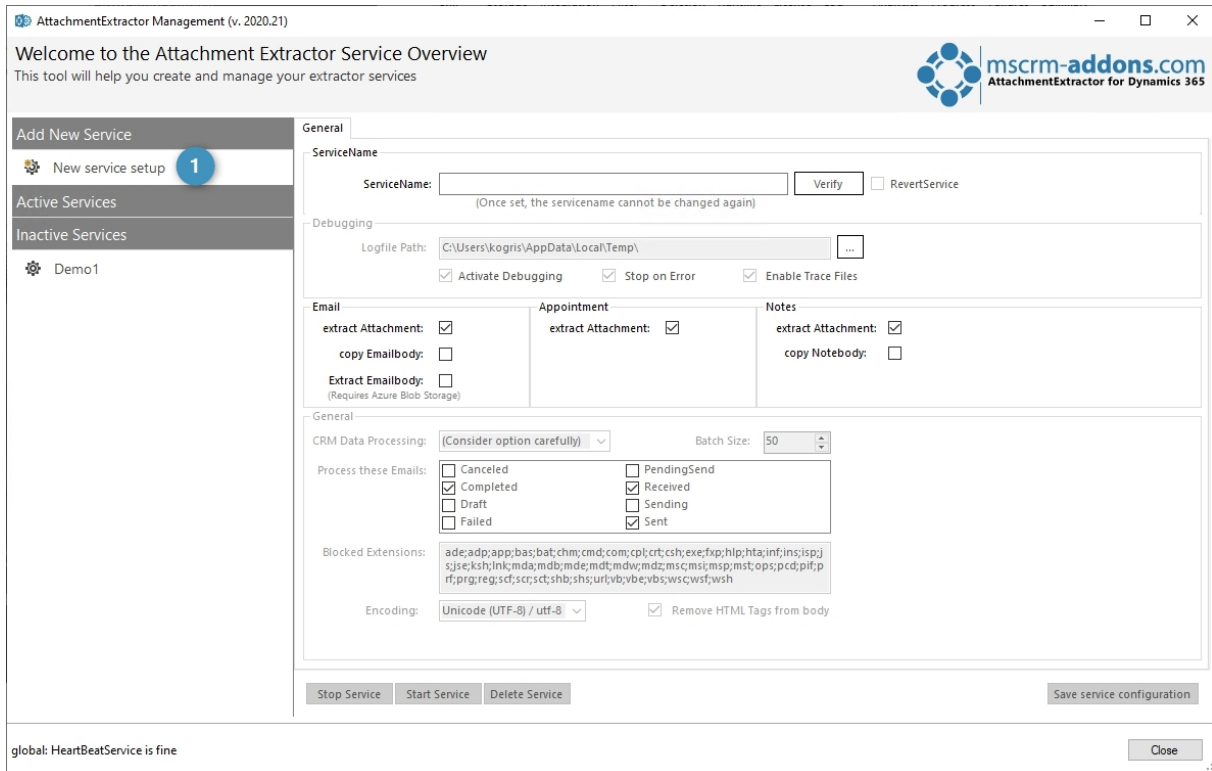


Figure 23: AttachmentExtractor Service Overview

Now insert a **ServiceName** of your choice (here: Demo1) **1** and click on the **Verify** button **2**. Afterwards click on the **Save service configuration** button **3** to proceed. Next, to the General-tab, two further tabs appear.

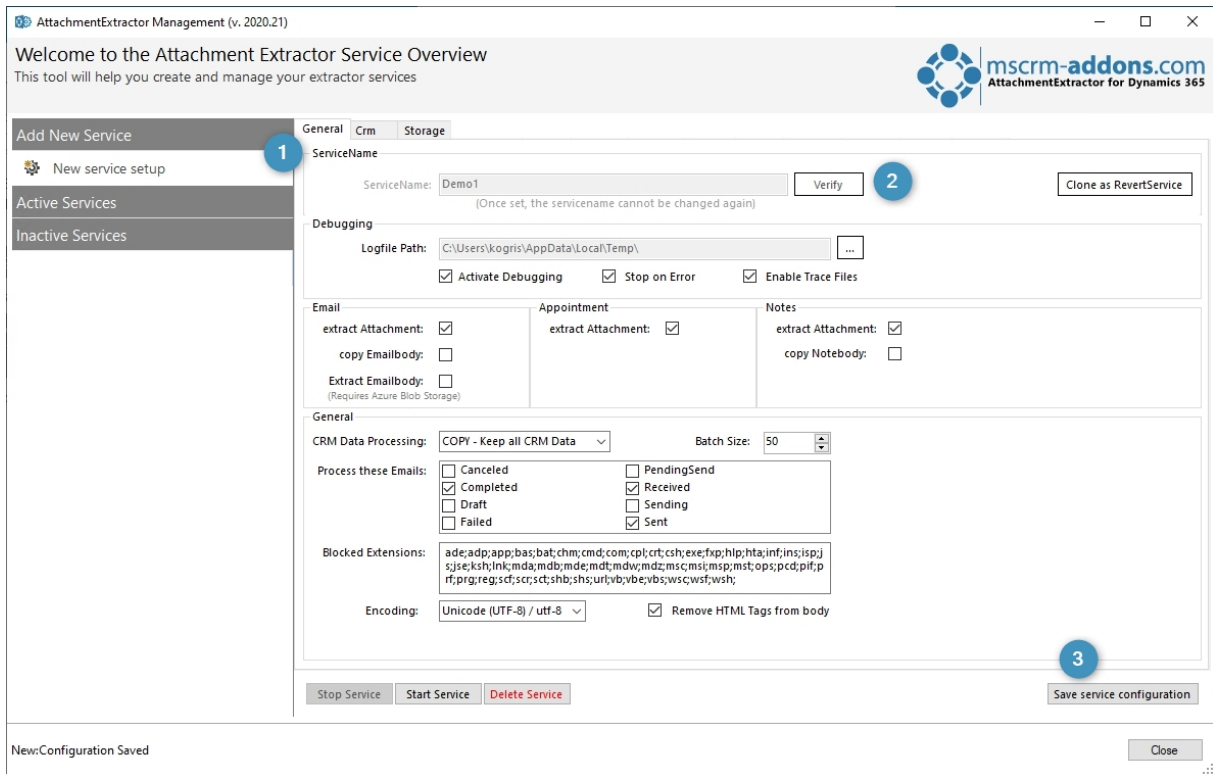


Figure 24: Create new service

Now switch to the **CRM Connection Setup** tab, select your Dynamics 365 type, type in the Dynamics 365 Server-URL and click on the **Retrieve all Organizations** tab. Select the appropriate organization and click on the **OK** button.

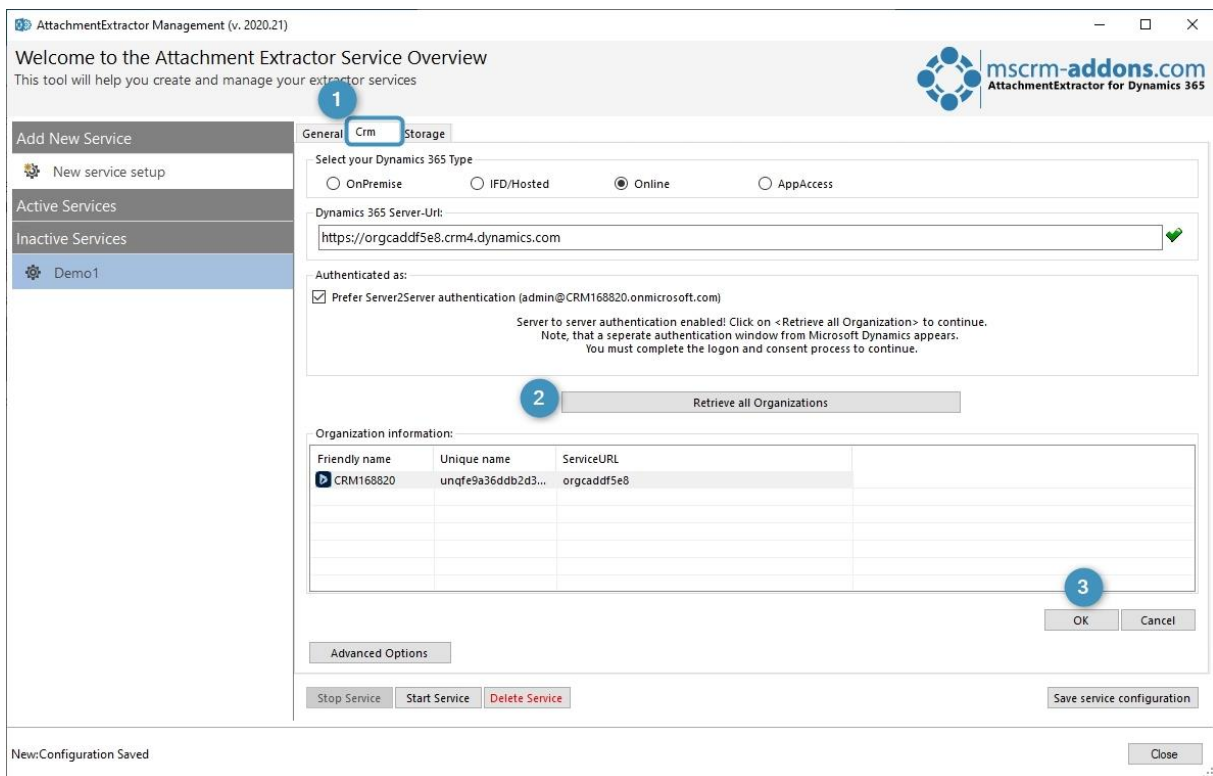


Figure 25: CRM Connection Setup

If the connection has been established successfully, the following dialog appears. Please click on the **OK** button in order to proceed.

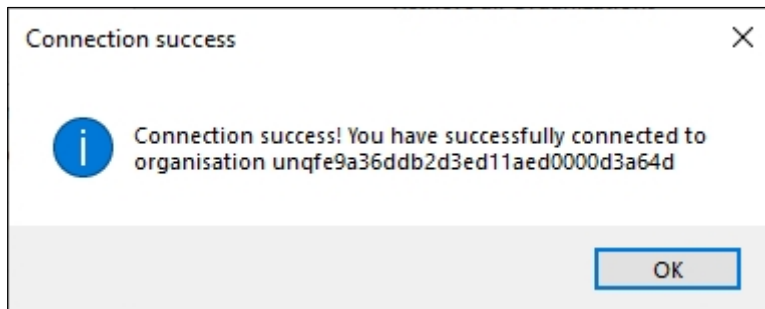


Figure 26: Connection success window

Now switch to the **1 Storage options** tab and select if you want to use **2 SharePoint, FileShare** or **Azure Blob Storage** as an active storage option. Depending on which option you select, the selected option is highlighted, while the other option remains grey. As shown in figure 23, **3 SharePoint** is used as storage location. We have already entered our SharePoint URL and saved our settings.

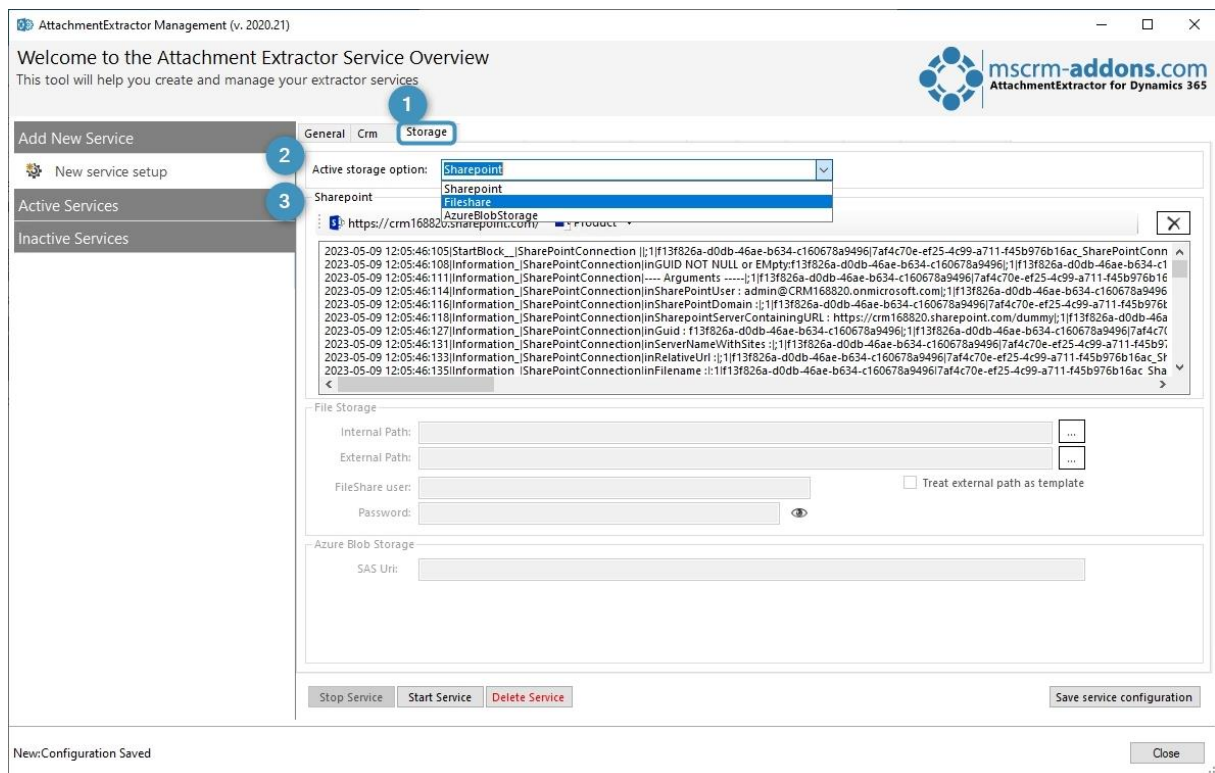


Figure 27: Set storage options

As soon the storage options are clear and saved, the new service appears in the **1 Inactive Services** overview. Furthermore, a few more tabs to work with have appeared.

Congratulations! You have created your first service!

Please note: As long as you have not started the service, the service remains in the Inactive Service section.

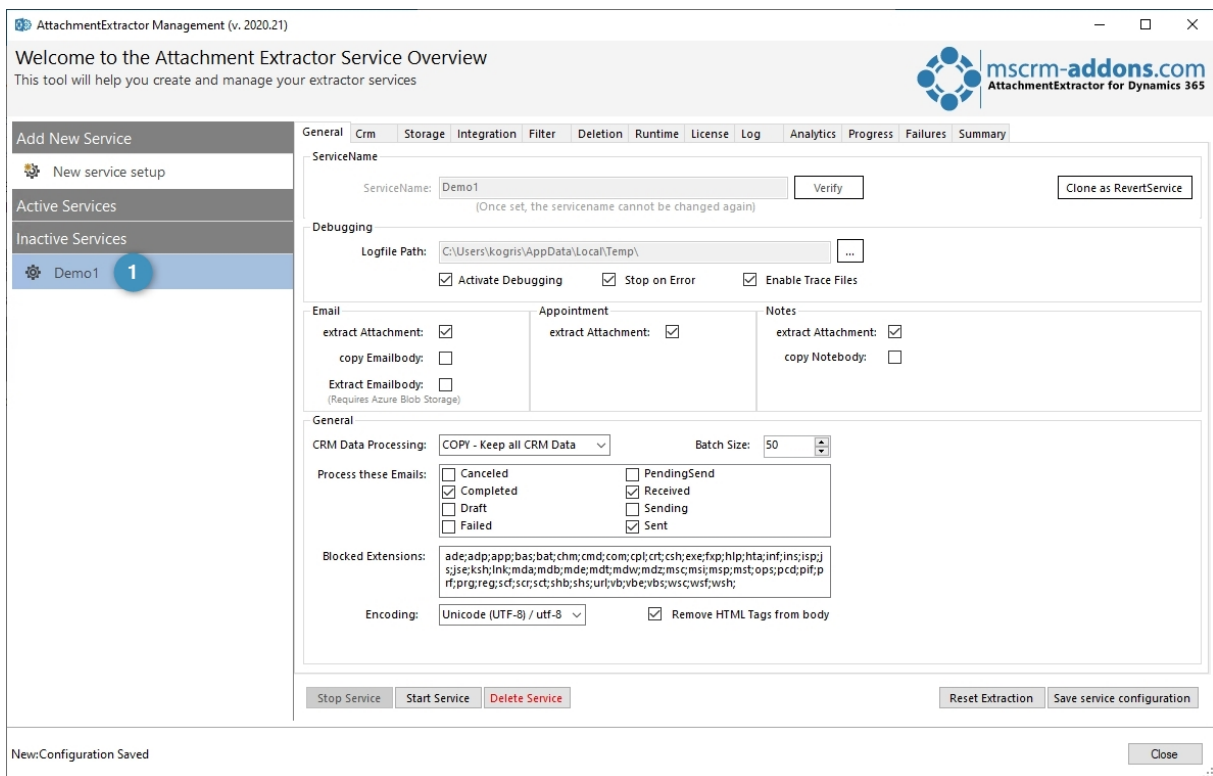


Figure 28: New created service

4.2. How to start a service?

Starting a service is very easy. To do so, simply click on the Service you would like to start in the **Inactive Services** section (here: **Demo1**) **1**. Next, click on the **2 Start Service** button. That's it!

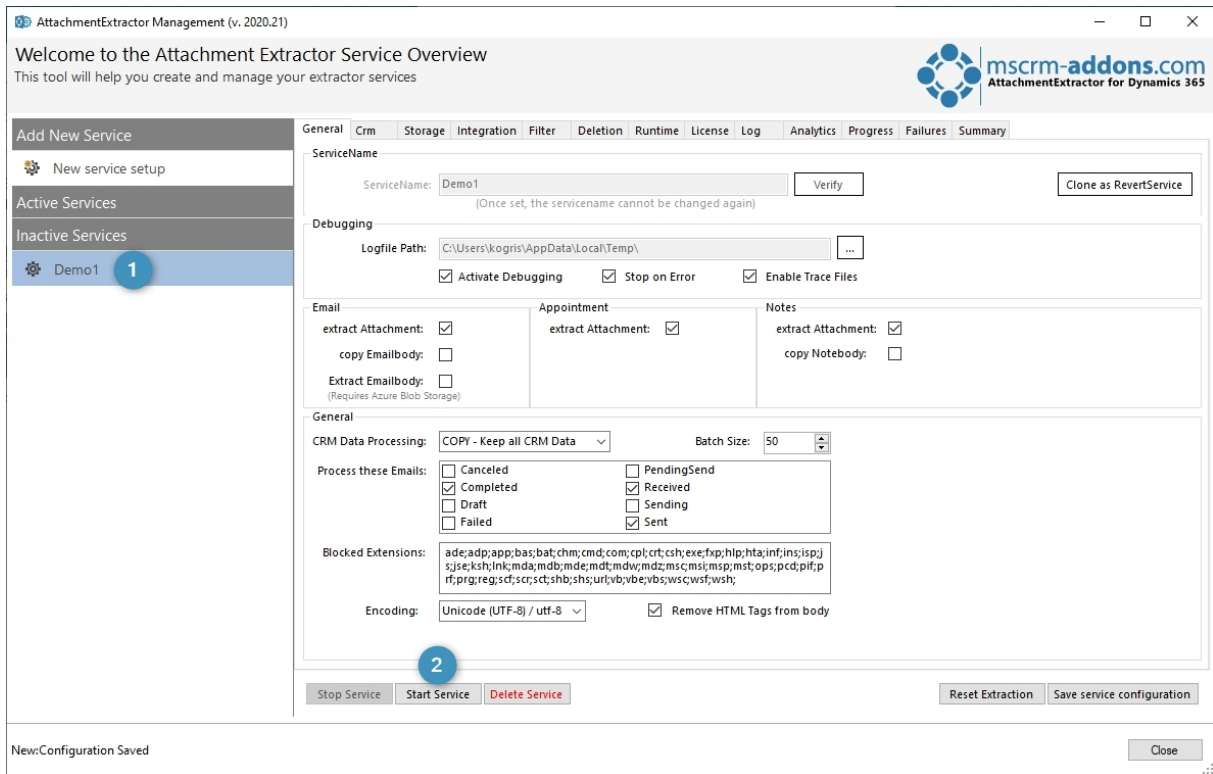


Figure 29: Start new service

4.3. How to react if AttachmentExtractor fails to upload large files?

Please note: This chapter only applies to SharePoint version 14 and lower.

AttachmentExtractor sometimes fails to upload files exceeding two megabytes of size (The actual size being blocked depends on various parameters and may actually be lower than the set value). To overcome this problem, please first check, if you see a message like the following in the event log or the log overview of the service configuration:

The request message is too big. The server does not allow messages larger than 2097152 bytes.

This indicates that the default upload method is not working due to server-side message size restrictions. Please follow the below step-by-step tutorial to get rid of this issue.

Step 1: Note your service name (the one you have entered when creating the service, for example Demo1).

Step 2: Open the registry editor on the machine, where the AttachmentExtractor service is installed.

Step 3: Open the following key:
**HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDV-
Systeme\AttachmentExtractorserver\Configurations**

Step 4: Find the key that equals your previously entered service name, for example:
**HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDV-
Systeme\AttachmentExtractorserver\ Configurations\Demo1**

Step 5: Find the following StringValue
UseSP15Upload

Step 6: Change the value to **true**.

Step 7: Stop and Restart the service.

4.4. Why aren't my attachments being extracted?

This is one of the most common questions our support deals with. Besides, it is also the most difficult question to answer because there is more than one possible reason for this issue.

Now before you feel upset, simply go through the below checklist. The solution for your issue might be only a click away.

- Are your User Credentials correct? Did you double check them?
- Do you use the right filetype? Did you select the correct one?
- What about the file size? Did you select the smallest possible file size?

If nothing on the checklist applies contact our support via support@mscrm-addons.com.

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For further technical questions, please visit our [blog](#) or contact support@mscrm-addons.com. For sales and licensing questions please contact office@mscrm-addons.com or the corresponding contact information below.



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