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AttachmentExtractor for Microsoft CRM 2015/2016 and Dynamics 365

v.2.2, Nov 2016

AttachmentExtractor

(How to work with AttachmentExtractor for MS CRM 2015/2016 and Dynamics 365)

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Preamble

This documentation is intended to guide you through the installation of AttachmentExtractor in Microsoft Dynamics CRM.

This guide applies to version 2015.117 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 installing AttachmentExtractor for Microsoft Dynamics CRM with the following basis skills

- Maintaining and configuring a Microsoft CRM Organization

Supported Web Browsers and versions

Supported Web Browsers:

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

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

- Microsoft Dynamics CRM Server 2015/2016
- Microsoft Dynamics CRM Online
- Microsoft Dynamics CRM on premise

1 How to install AttachmentExtractor



During the installation, you have to specify an organization of CRM 2015, where *AttachmentExtractor* will be installed initially. Additional organizations can be setup from the installation manager after the original setup has finished.

1.1 Introduction

Before you start the installation, you have to download the AttachmentExtractor Application. You can download the files [here](#).

Once opened, double click on the *AttachmentExtractor for Microsoft Dynamics CRM* application.

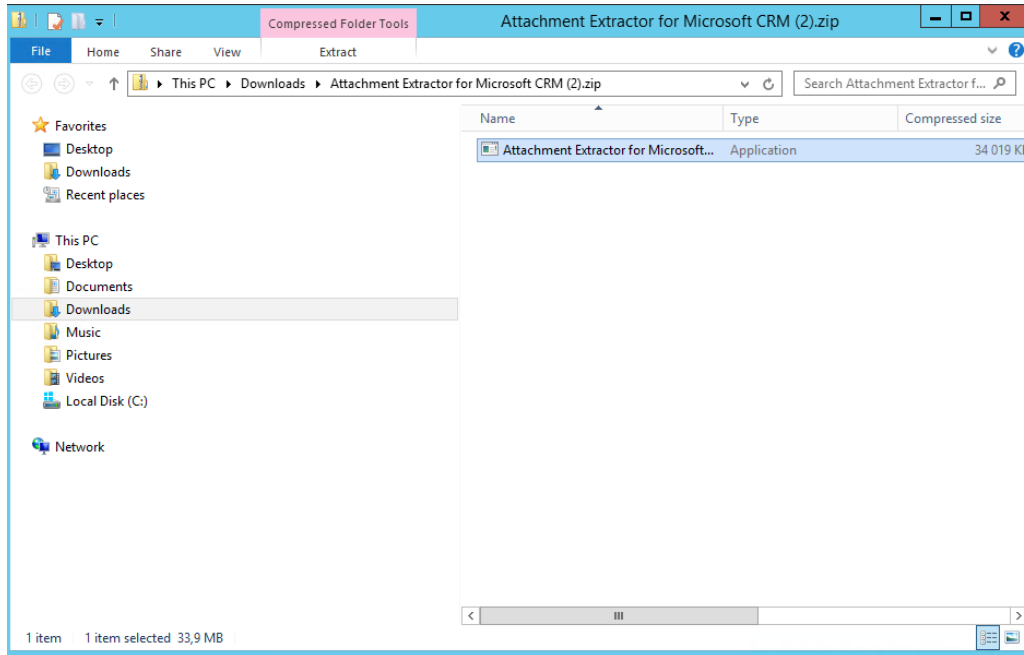


Figure 1 AttachmentExtractor for Microsoft Dynamics CRM application

The AttachmentExtractor Installer opens. Click on the **[NEXT]**-button in order to proceed.

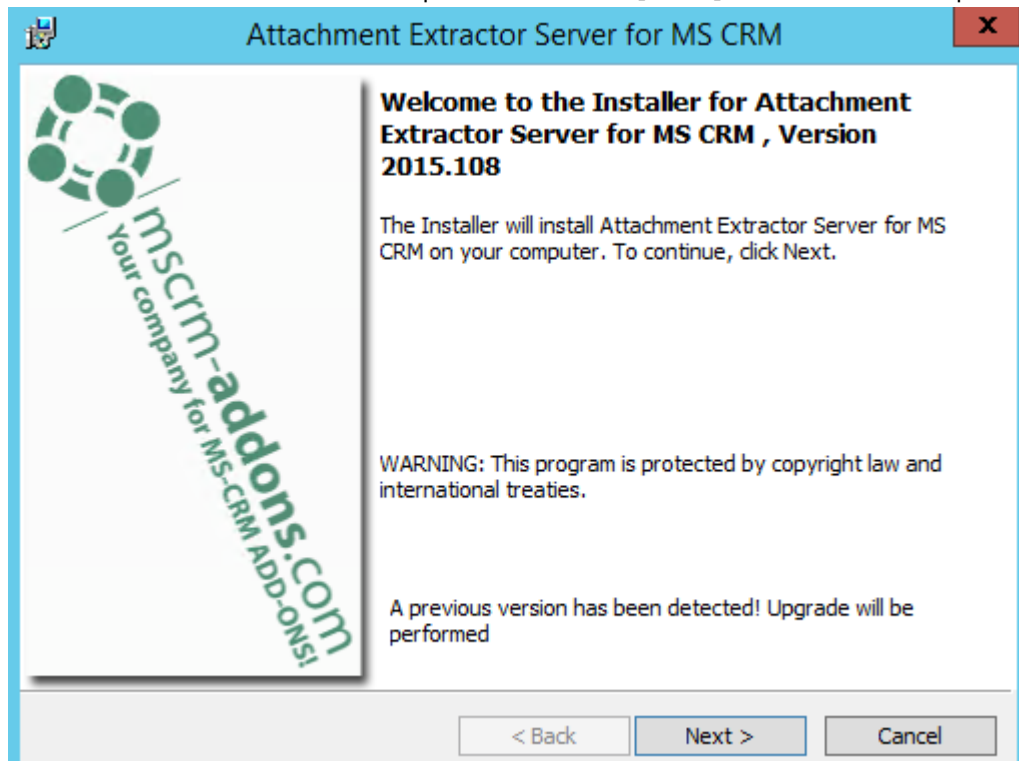


Figure 2 AttachmentExtractor Installer

1.2 EULA (End User License Agreement)

Please accept the EULA (End User License Agreement) and click on the **[Next]**-button in order to proceed. When you click on the **[Print]**-button, you can as well print the License Agreement.

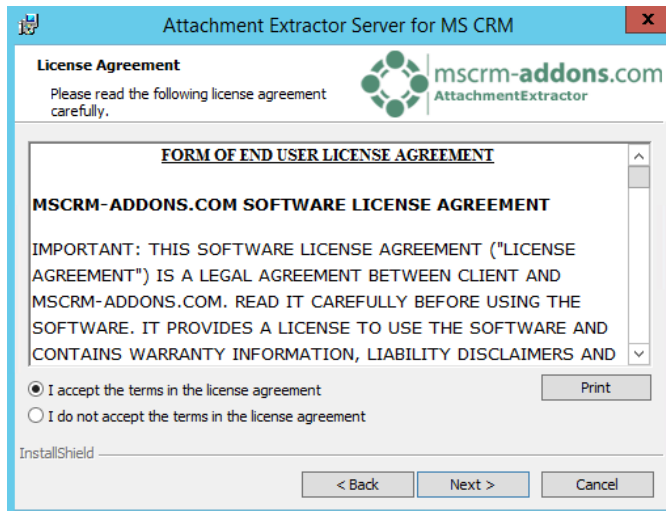


Figure 3 End User License Agreement

1.3 Folder Selection

The next step consists of the selection of the destination folder for AttachmentExtractor. If you are okay with it, click on the **[Next]**-button. If not, simply click on the **[Change]**-button in order to specify a different installation path.

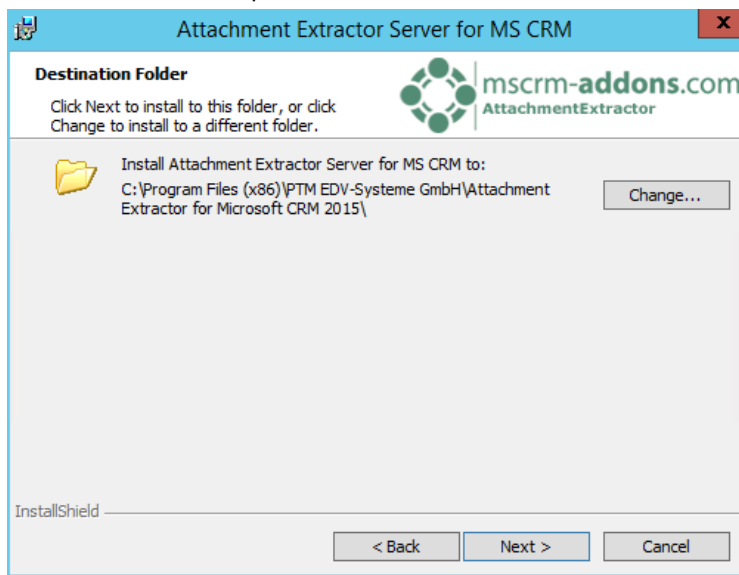


Figure 4 AttachmentExtractor destination folder

1.4 Confirm Installation

Now start the installation of AttachmentExtractor. To do so, simply click on the **[Install]**-button.

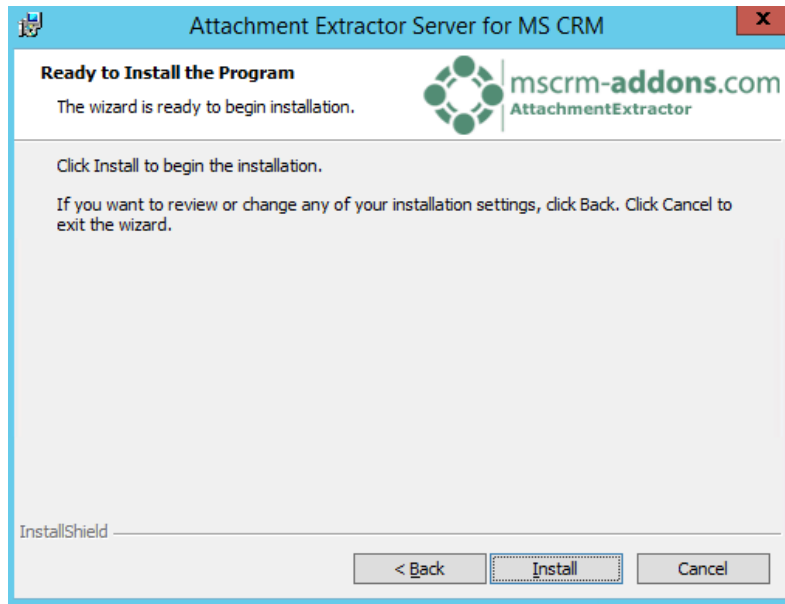


Figure 5 AttachmentExtractor Installation Wizard



The installer will launch the Service Management tool. The installer will stay active until the Service Management is closed again. You are not required to create a service to finalize the installation.

1.5 Configure CRM Server

Because AttachmentExtractor requires a connection to CRM, you have to configure your CRM Server as well. When the CRM Connection setup window opens, select an existing profile or create a new profile.

Welcome to your CRM Connection setup.

Please specify your connection details to connect to CRM. If you do not know the connection details, please contact your system administrator

CRM Connection | Advanced Settings | Log

Existing Profiles: [HKLM] crm:5555 Manage

Select your Crm Type

Standard (onPremise) IFD (Hosted) Crm Online

CRM Server-Url:

http:// crm:5555 ✓

Authenticated as:

Use default Credentials: **Integrated Security (CRMTEST0administrator)**

Username: _____ Domain: _____ Password: _____

Retrieve all Organizations

Organization information:

Friendly name	Unique name	ServiceURL
Standard	Standard	Standard
PTM EDV Systeme...	PTMEDVSystemeG...	PTMEDVSystemeGmbH
crm2016	crm2016	crm2016

Reset LiveID Cache OK Cancel

Figure 6 CRM Connection Setup dialog

Select the server path and add your login credentials by filling in the field's username, password and domain or choose the default credentials. As soon as the Organizations are retrieved press the [OK]-button. For further information on the CRM Connection dialog, have a look at the [Connection dialog documentation](#).

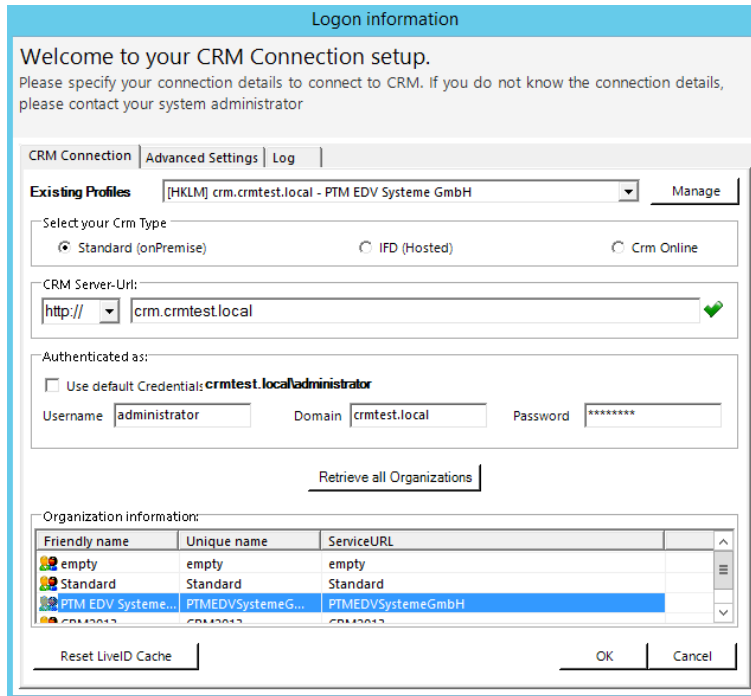


Figure 7 CRM Connection dialog

1.6 Finish

Finally, click on the **[Finish]**-button to finish the installation

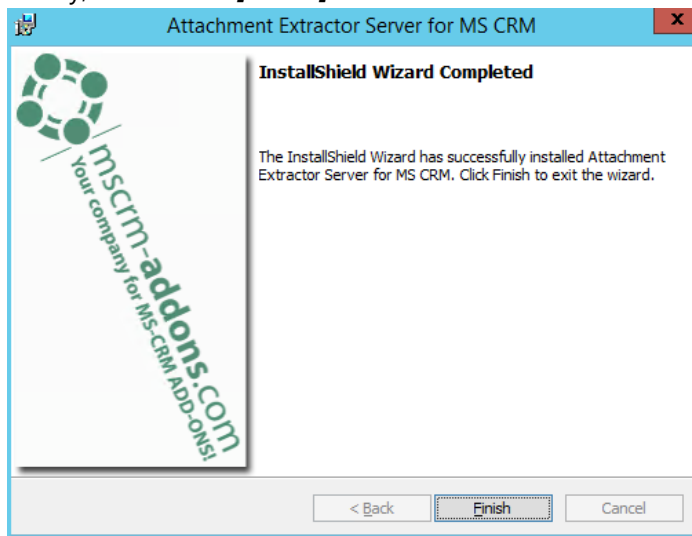


Figure 8 Install Wizard Completed

2 License Manager

The License Manager provides you with information regarding to your current license status.

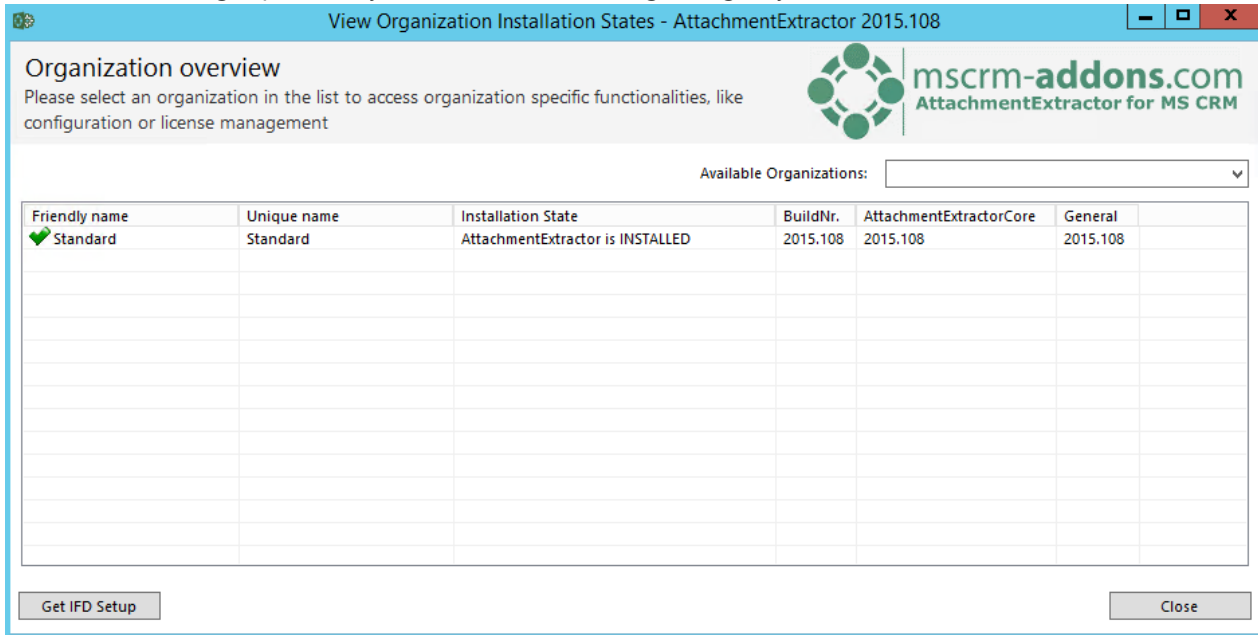


Figure 9 License Manager - Organization Overview

When you mark your current license, some buttons appear in the left lower corner. Using them, you can reinstall or upgrade your license, open the LicenseManager, launch the configuration or uninstall it. For further information on the LicenseManager, please have a look at our [LicenseManager documentation](#).

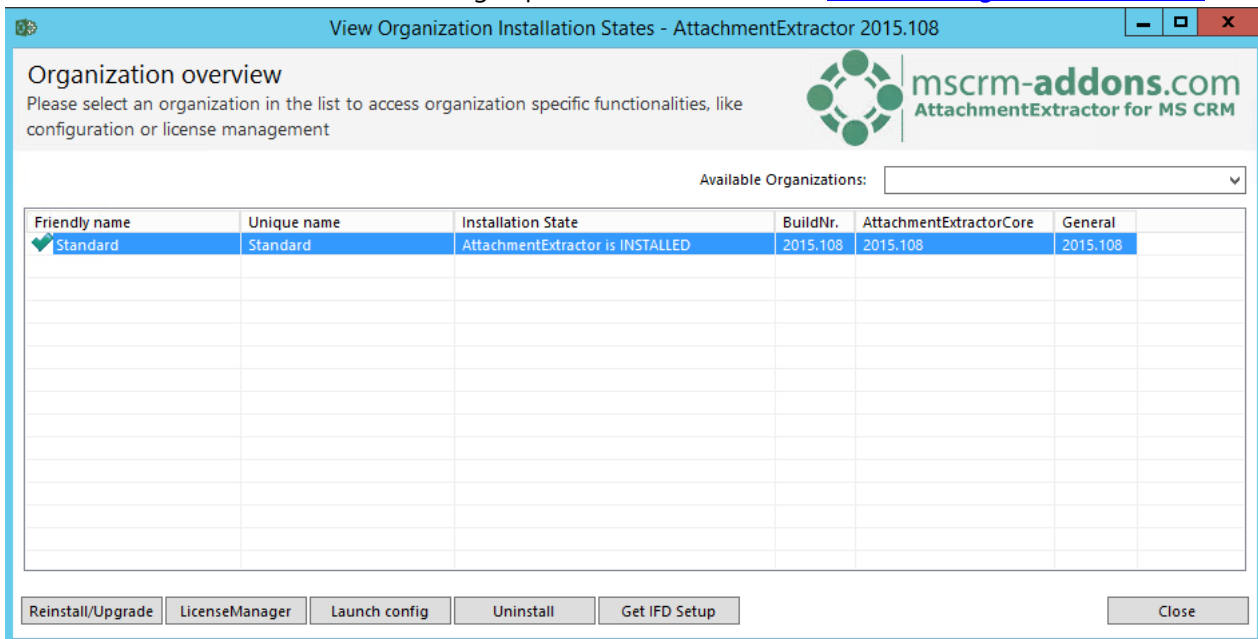


Figure 10 License Manager - Organization Overview with marked license

3 Security Roles

During the installation, you will be also asked, if you want to install the Security Roles.

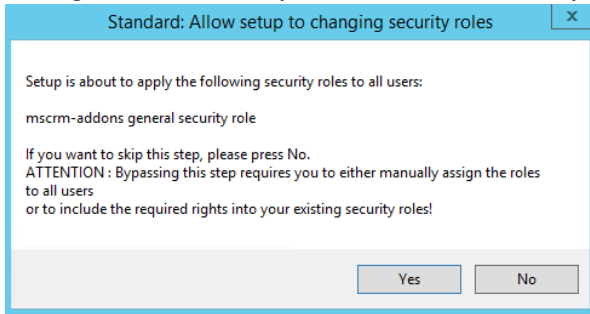


Figure 11 Security Roles question box

Click on the **[Yes]**-button in order to proceed while applying the security roles to all users.

Press the **[No]**-button if you do not want to apply the security roles to any user.



If you decide not to apply the security roles automatically, you will have to assign the rules manually.

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.

4 How to uninstall AttachmentExtractor

To uninstall AttachmentExtractor, open *Programs and Features* > *Uninstall a program* in the Control Panel.

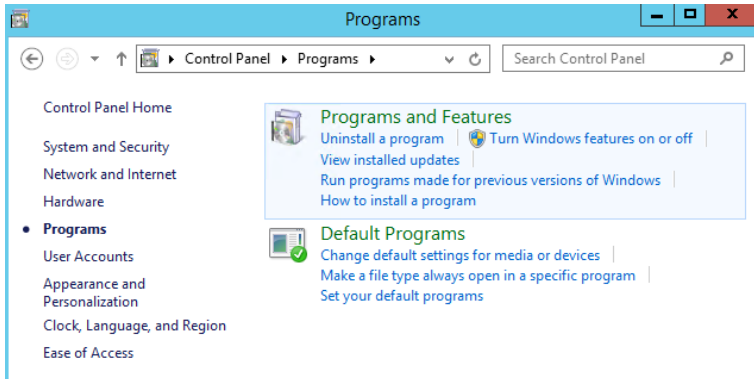


Figure 12 Programs and features > Uninstall a program

Now look for *AttachmentExtractor for MS CRM 2015*, select it and click on *Uninstall*.

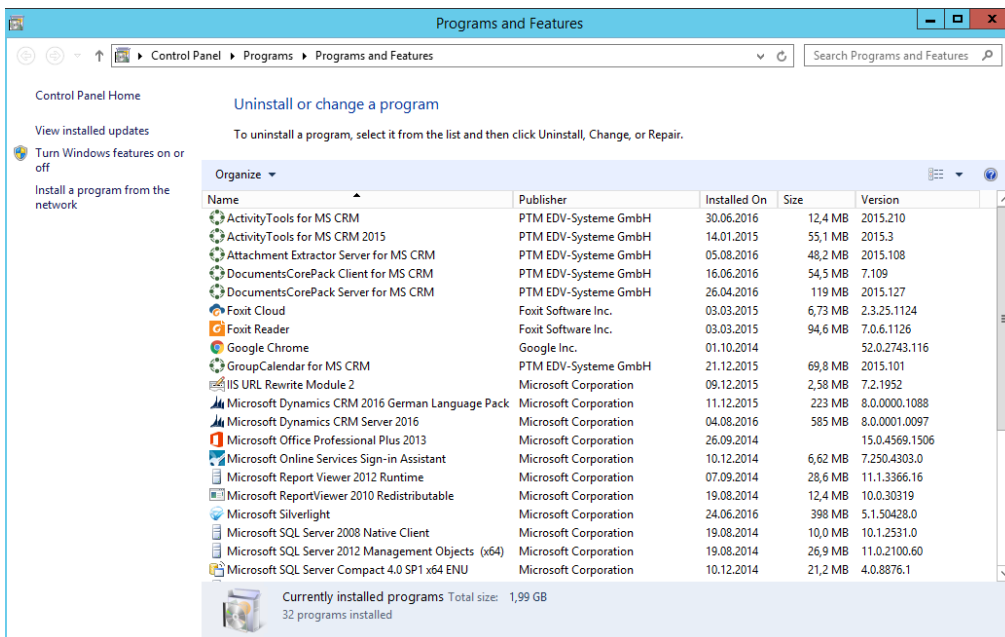


Figure 13 Uninstall AttachmentExtractor

The following window appears:

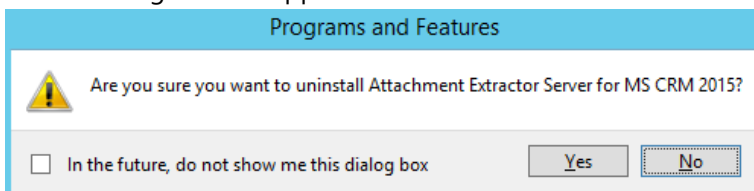


Figure 14 Programs and Features - Uninstall dialog

Confirm the question if you are sure to uninstall AttachmentExtractor Server for MS CRM 2015. Click on the **[No]**-button if you don't want to uninstall AttachmentExtractor Server for MS CRM 2015.

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6 Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact support@mscrm-addons.com.

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