Documents Core Pack Server Config for CRM Live 4.0

Version 4.0 (server)

Implementation Guide
(How to install/uninstall,..)

Implementation Guide for Documents Core Pack 4.0 for CRM Live (server).docx

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1 Installing of Documents Core Pack

Before installing Documents Core Pack, please read this document and follow the steps carefully.

After successful installation please read the "Users Guide" which will be installed with the "Documents Core Pack Client".

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 following steps, to complete the installation:

1. Installing the server components of Documents Core Pack
2. Configuring the CRM system
3. Installing the client components of Documents Core Pack
4. Configuring client security

1.1 Documents Core Pack Server configuration

You have to download the DCPServerConfigForCrmLive.zip from www.mscrm-addons.com and extract all files to a location on your hard disk where you want. After that start the DocumentsCorePackServer.bat. When you first run the configuration tool, you'll see following screen:
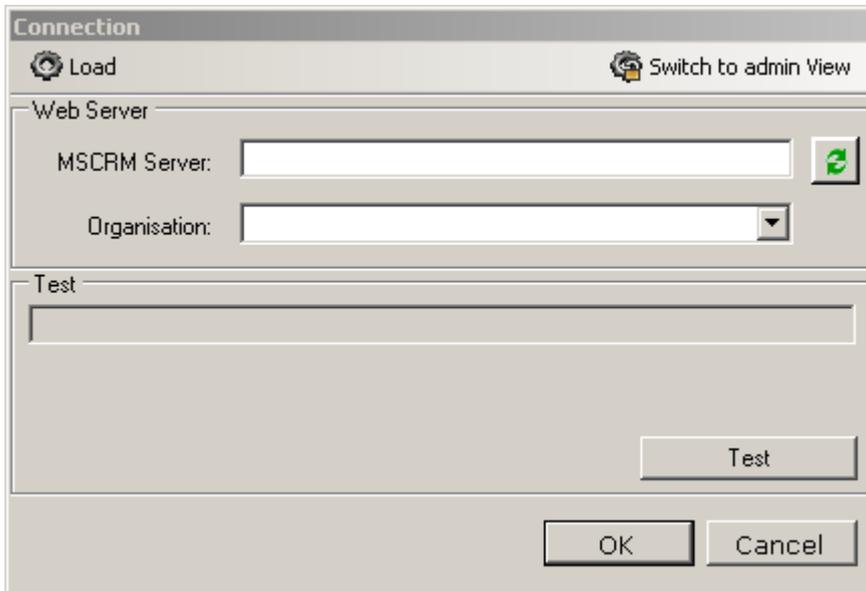
Switch do admin view, select "Live" as connection type and fill out the rest of the dialog.
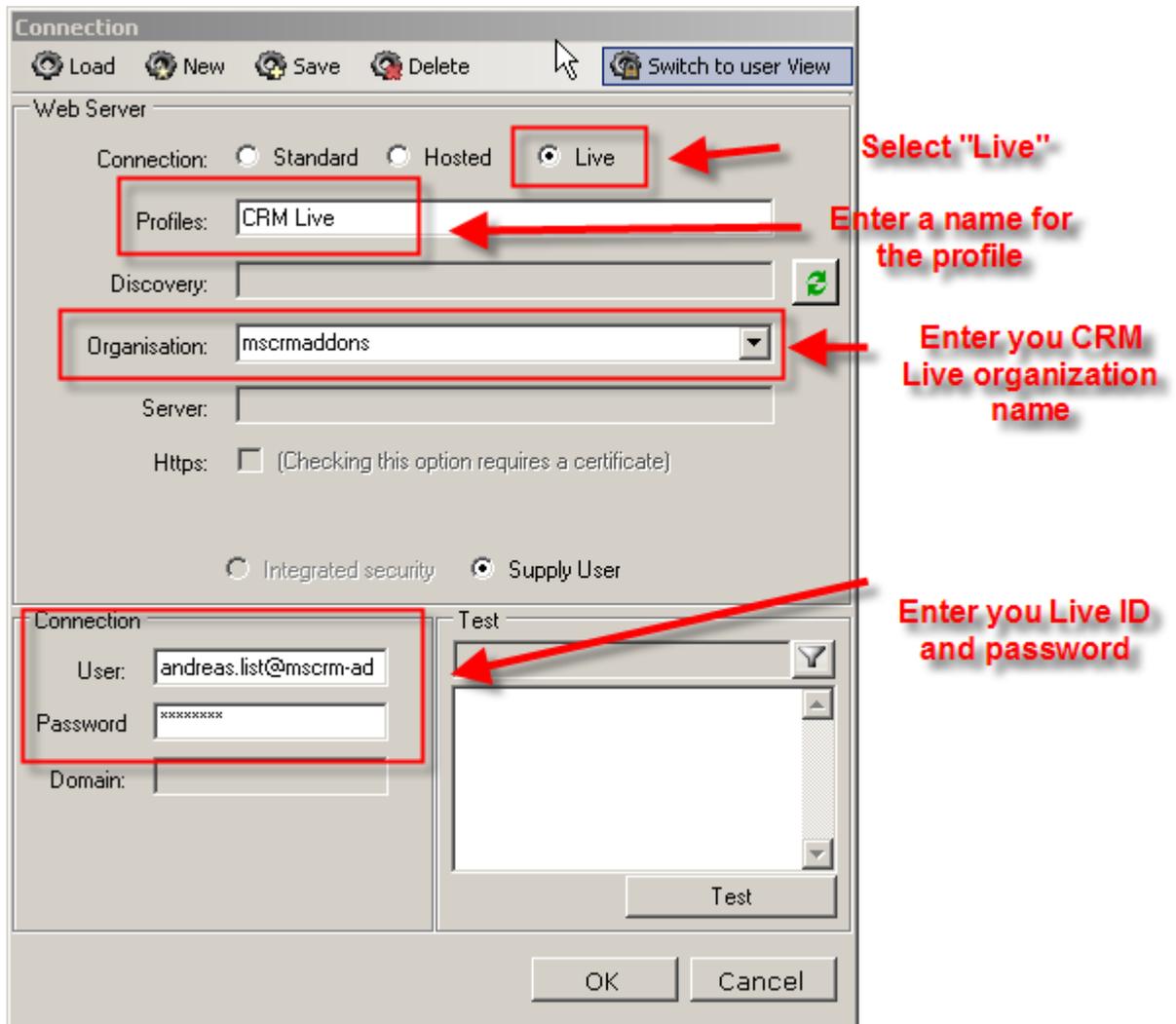
Click on OK and the configuration tool will connect to CRM Live.

Additional:
If your current profile is not a valid CRM Live profile, then an error-message like this appears:
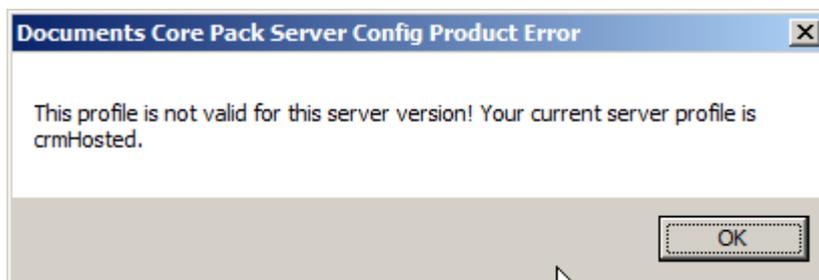
Then decide if you want to update your profile to a valid CRM-Live Connection.
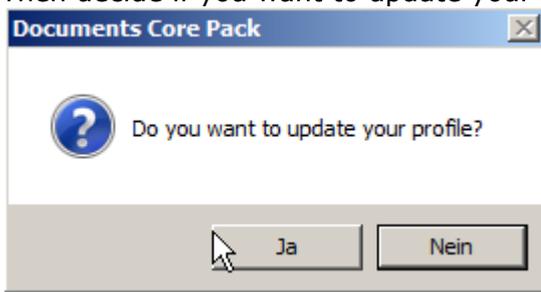
If you choose No, Documents Core Pack Server Configuration will abort execution. This means Documents Core Pack Server (Live Version) is only configurable with a valid CRM Live profile.

1.1.1 ISV Config

Here its possible to choose the entities where the "Print in Word" button should appear in CRM.
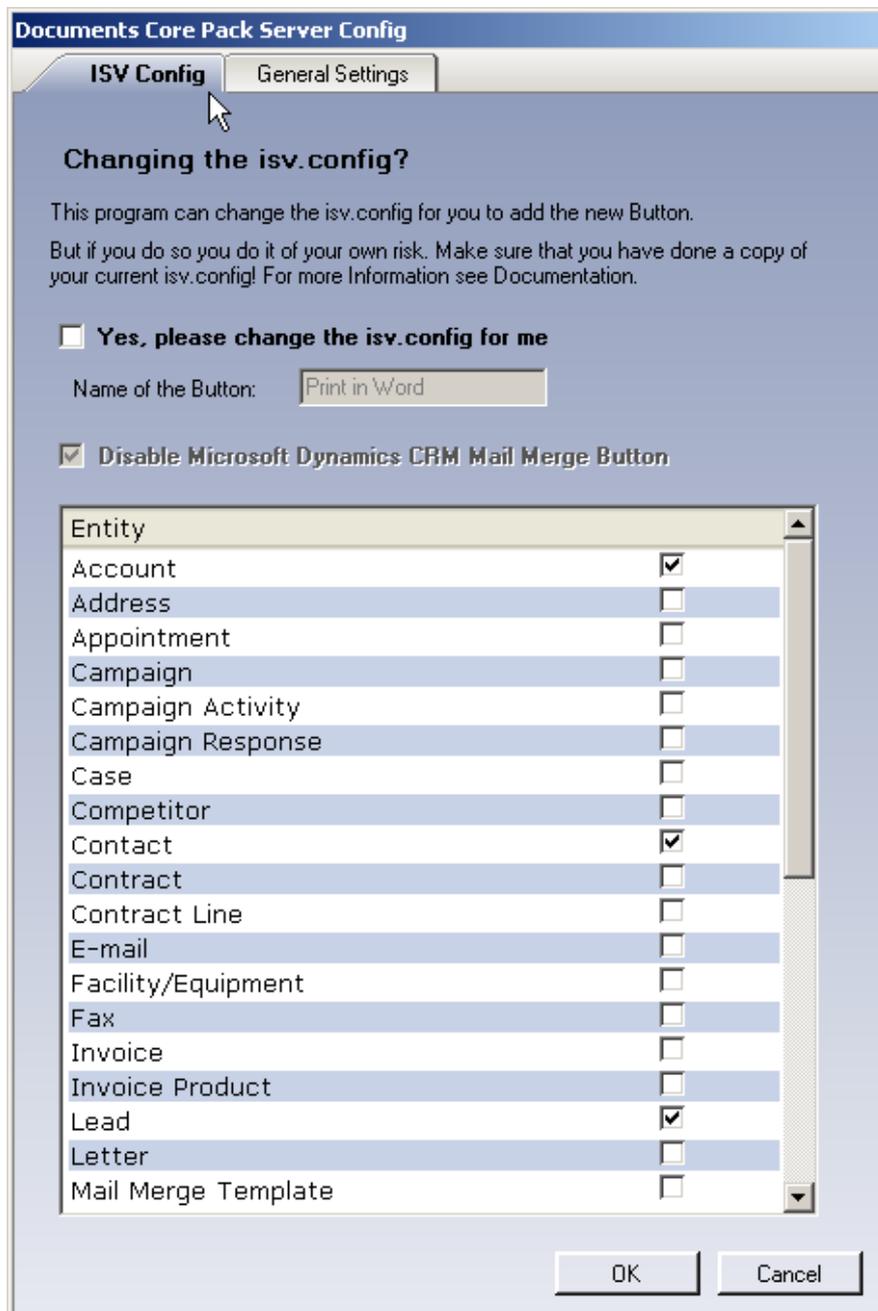
If you say YES, then Documents Core Pack Server Config creates a copy of the original and changes the isv.config for you.

Select each Object where you want to add the new Button. The Name of the Button can also be given.

If you want you can disable the Microsoft Dynamics CRM Mail Merge functionality by marking "Disable Microsoft Dynamics CRM Mail Merge Button". This setting will disable the mail merge role privilege for all roles (except system administrator)

1.1.2 General Settings
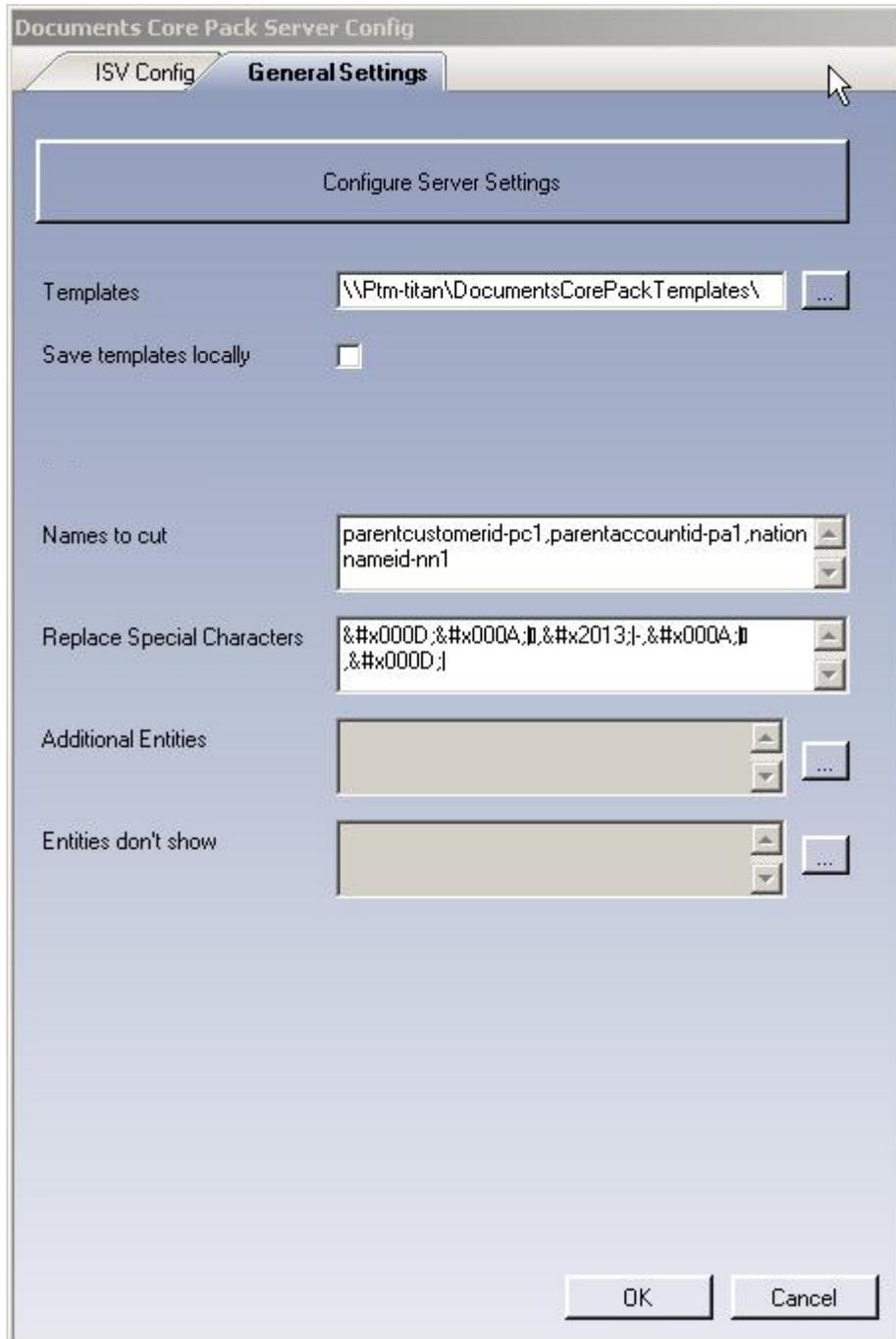
1) **Templates**
   Here it's possible to define the location of the Documents Core Pack
   templates
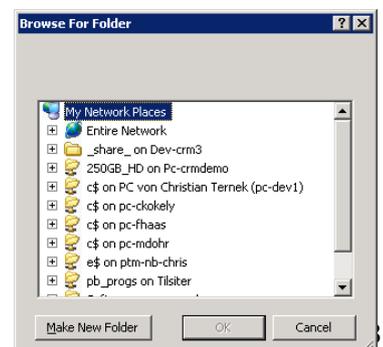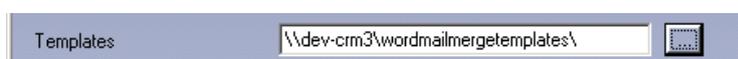
2) **Names to Cut**
For detailed in formation see chapter 1.5.3

3) **Additional Entities**
Documents Core Pack only shows customizeable entites by default.
If you want to use other entities for Documents Core Pack you have to
define them in here.

Ad 6 & 7: To add entities, click on the [..]-icon. A new window will appear which
allows you to insert entities.
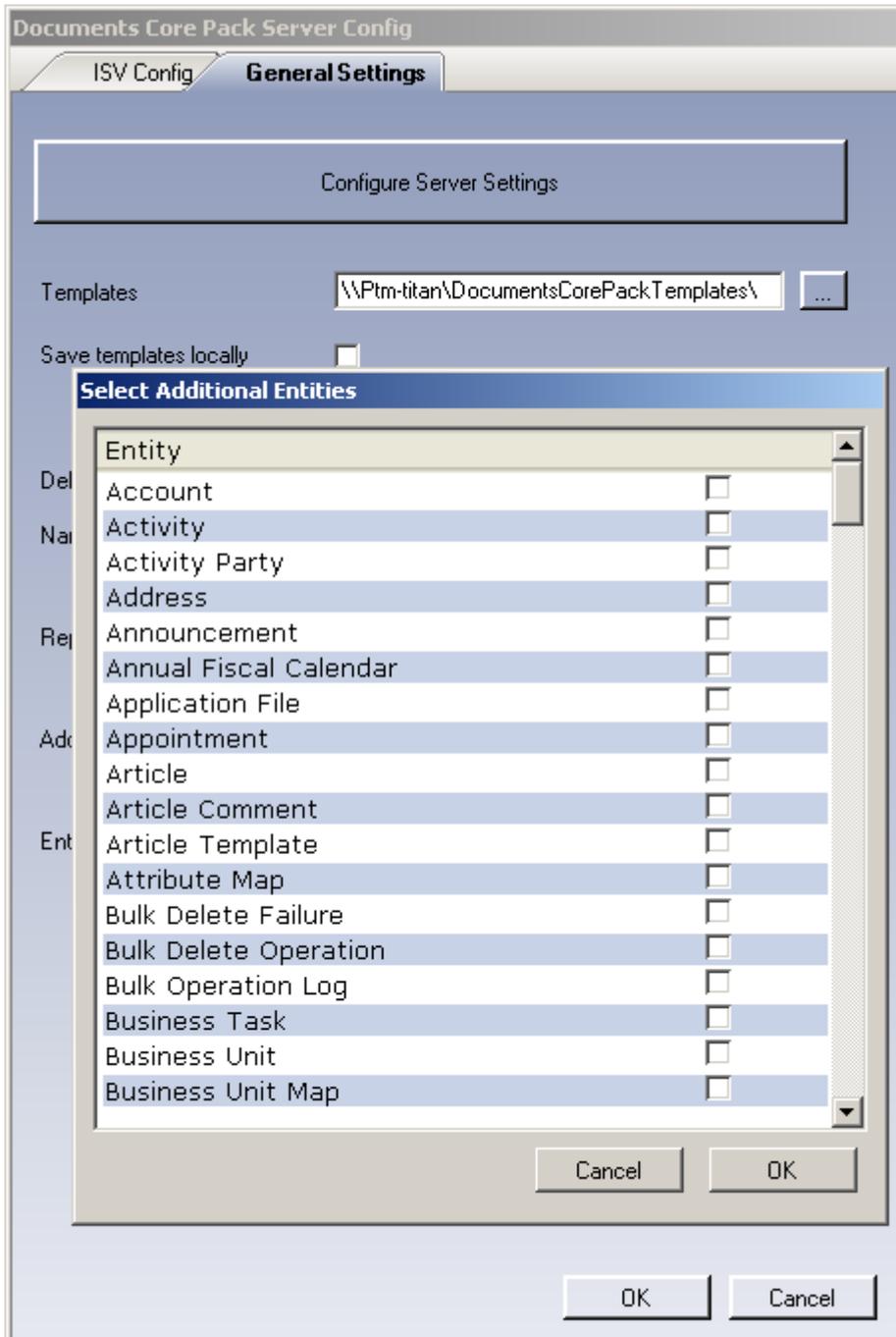
4) **Save templates locally**
to allow users to use templates from their local machines.

Users can specify the folder where they want to use the templates locally from in the Documents Core Pack Settings on the client.
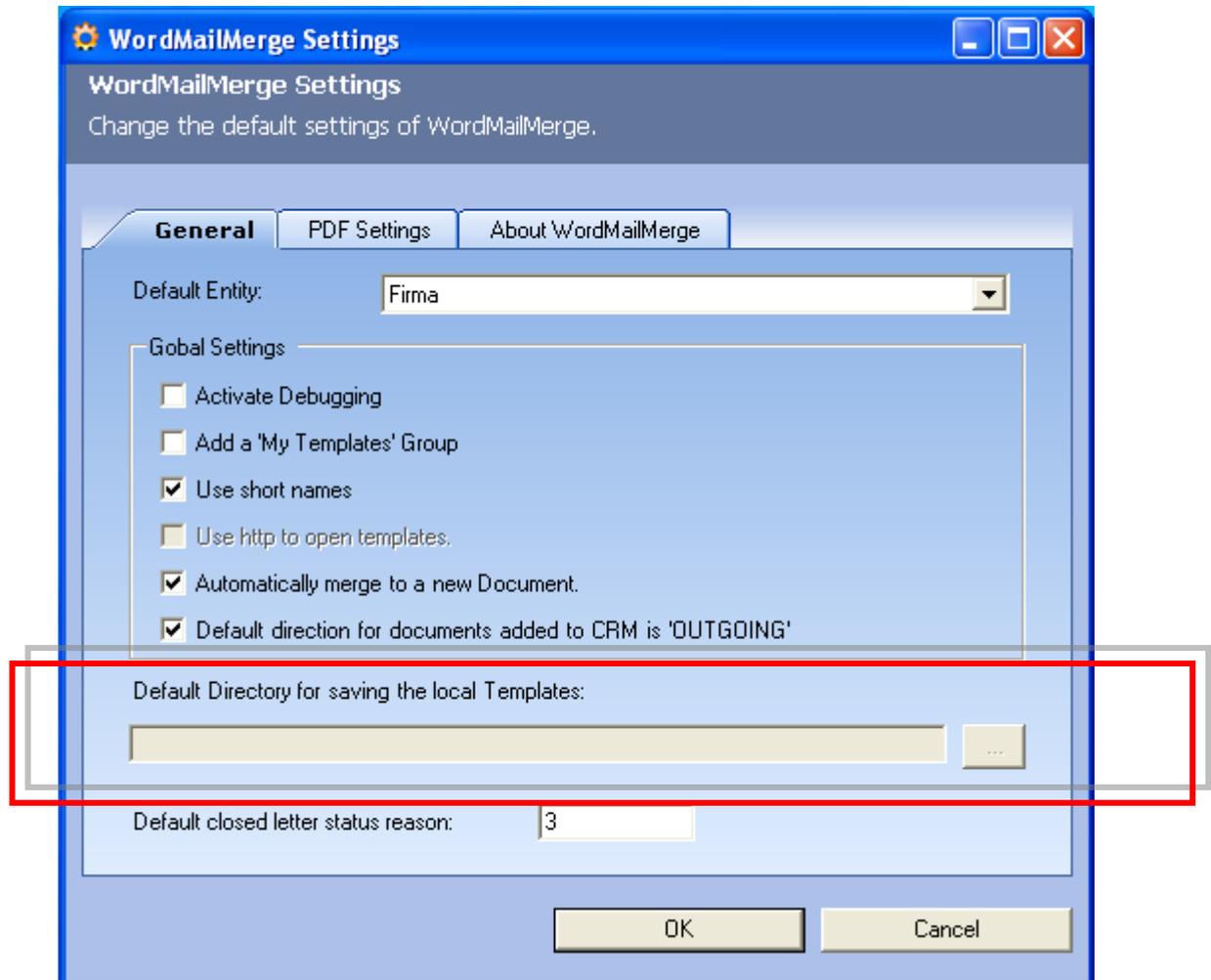
1.1.3 Installing the License for Documents Core Pack

You need to install a valid license for Documents Core Pack Server Component.
Therefore

1. Run the License Manager
    a. Open folder: PTM.LicenseManager
    b. Click on: PTM.LicenseManager.exe
    c. Click on: Documents Core Pack (left navigation bar)
2. Install your license
    a. Click on the folder-button and select your license-file
    b. Click on Install License
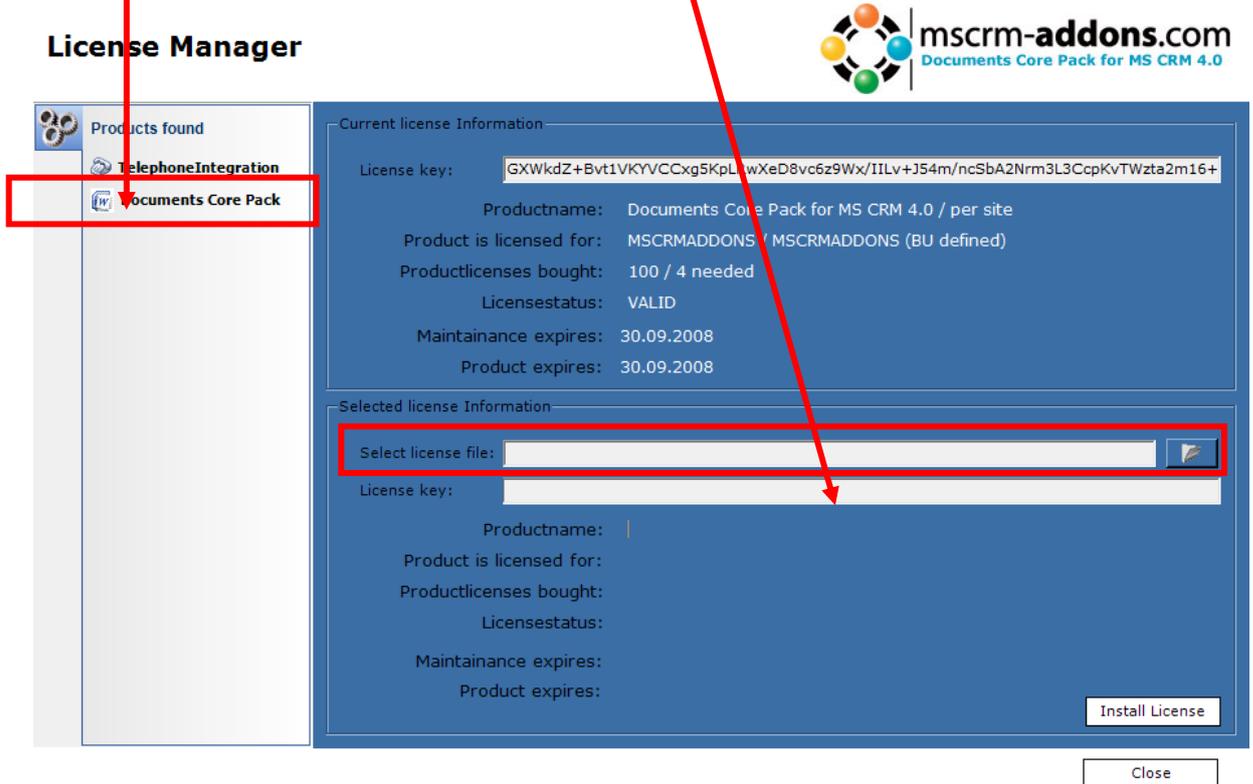
1.2 Installing the client component

1.2.1 Prerequests

Setting Internet Explorer Security, to enable mail merge from the CRM web client
The tasks below are done on each client machine or on the terminal server.

Documents Core Pack will run under the standard security settings pre-defined for
the zone "Trusted sites", however as part of the Internet Explorer security, you
will be prompted if you want to activate the Documents Core Pack ActiveX add-in.

In order to run Documents Core Pack without being prompted, follow the steps
below.

First, you need to check what Security Zone the CRM system runs in, on the client
machine.
To complete this task, do the following:

1. Start Internet Explorer
2. Type the CRM Server address in the "Address Bar"
3. Check the Zone Setting on the right side of the Internet Explorer Status
   Bar

Example of the Zone Settings:

The following screenshot shows you how to change the security zone of MS CRM.
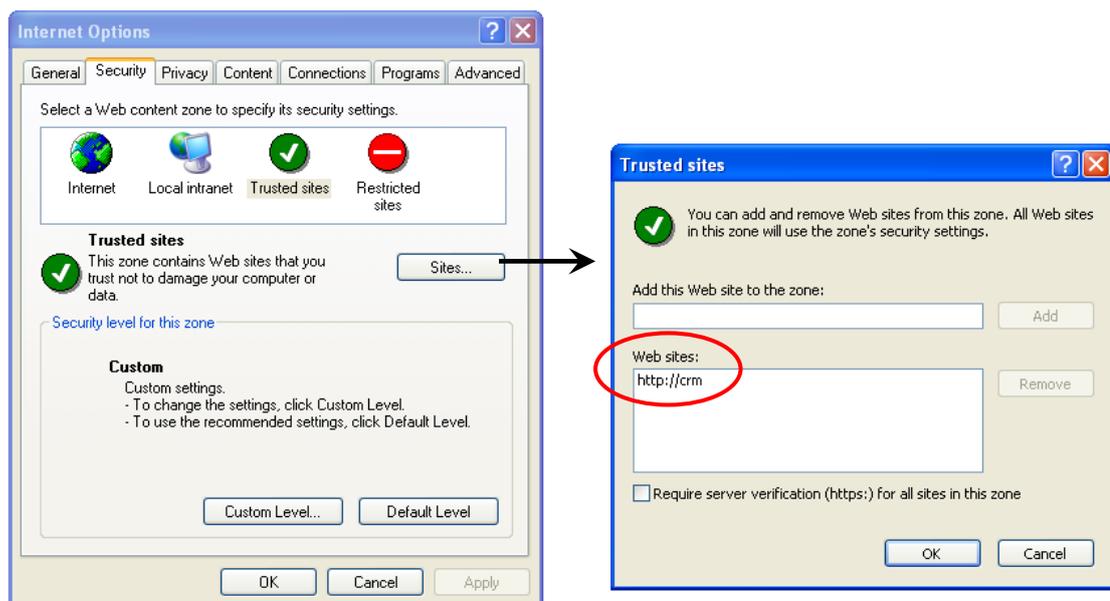
Please enter your crm-site to this list on every client!

Setup Internet Explorer to allow the Documents Core Pack ActiveX controls to run:

4. Double-Click on the **Zone Setting Icon** (Local Intranet in this example). The following dialog box will appear:

5. Click on the **Custom Level** button, to view the current Security Zone Settings. You must now set the following settings, to either "Enable" or "Prompt" ("Enable" is recommended):

6. Click OK twice to accept and close the Security Zone Settings

The Documents Core Pack Client is now setup and ready to mail merge from both Microsoft Word and the Microsoft CRM Web Client.

1.2.2 Installing Documents Core Pack 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 go sure you can verify that Word and Outlook not are running, by starting the Windows **Task manager**, and checking that WINWORD.EXE and OUTLOOK.EXE are not running in the processes list.

Install the component on the client:

1. Run the "Documents Core Pack Client for MS CRM 4.0.msi" Setup file. You will see following window:

Click Next ->

2. End User License Agreement(EULA)

3. MSCRM Server
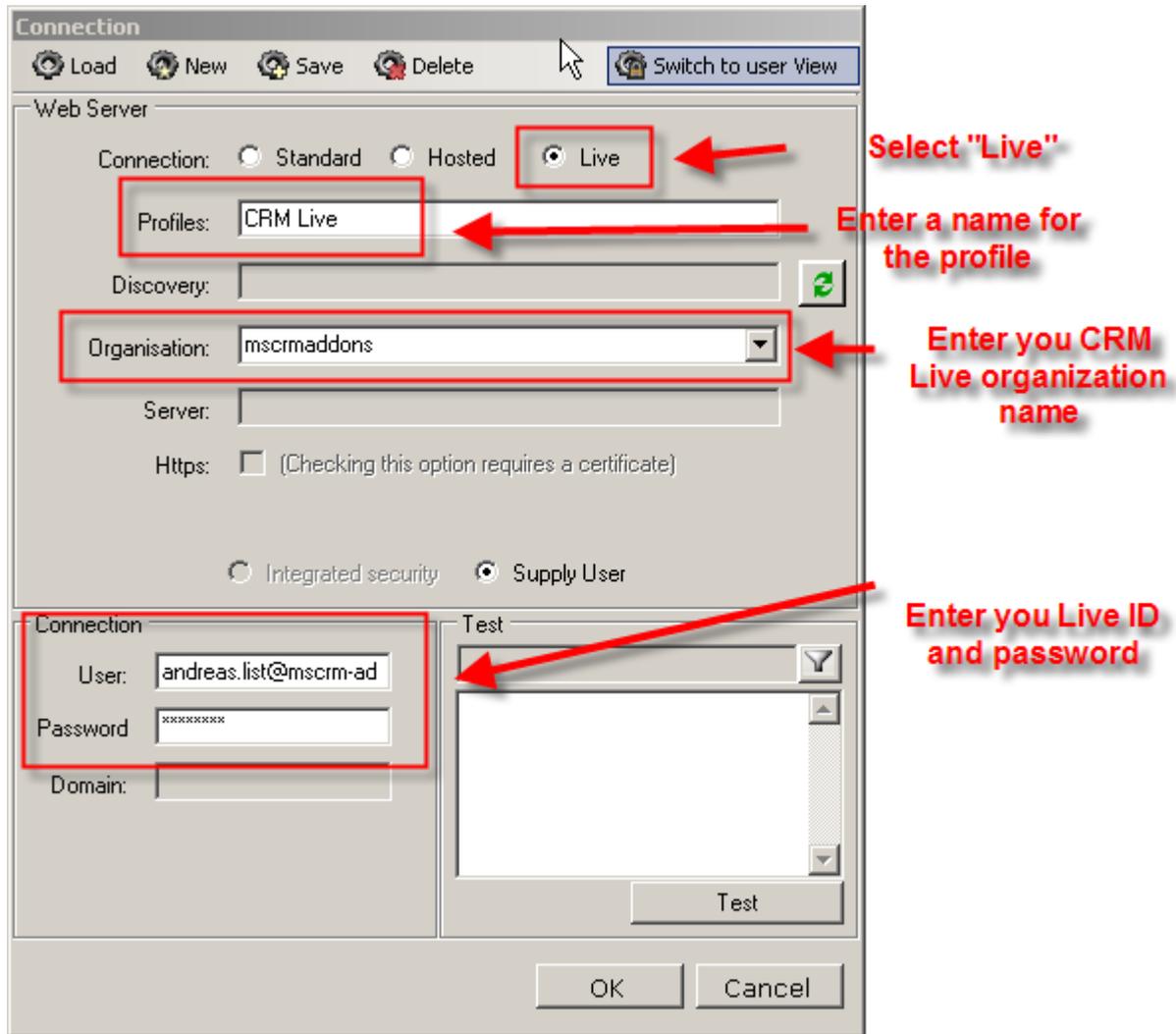
Click OK.

4. Select Installation Folder
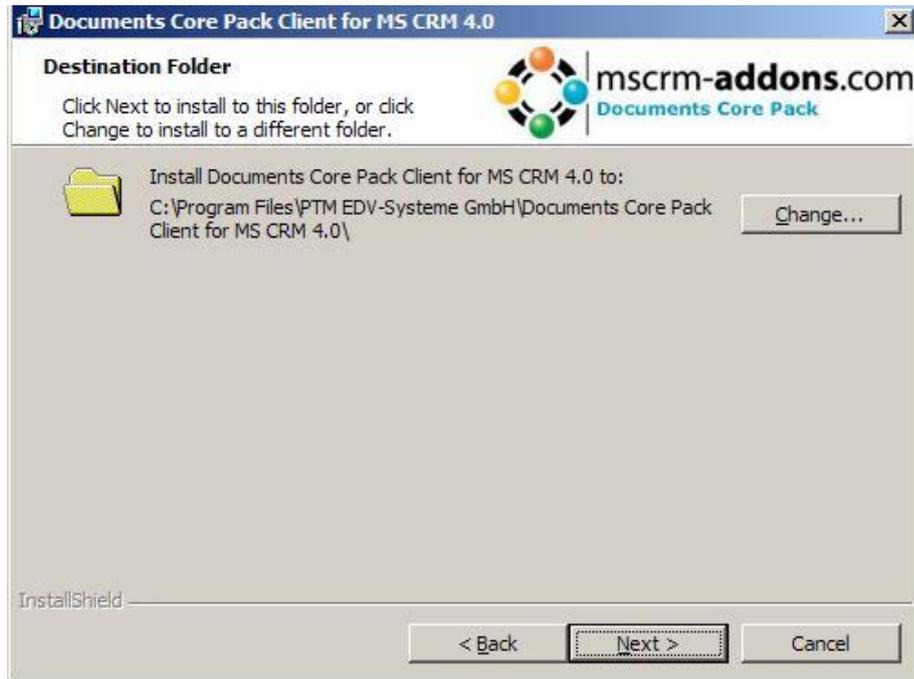
Click Next ->

5. Confirm Installation
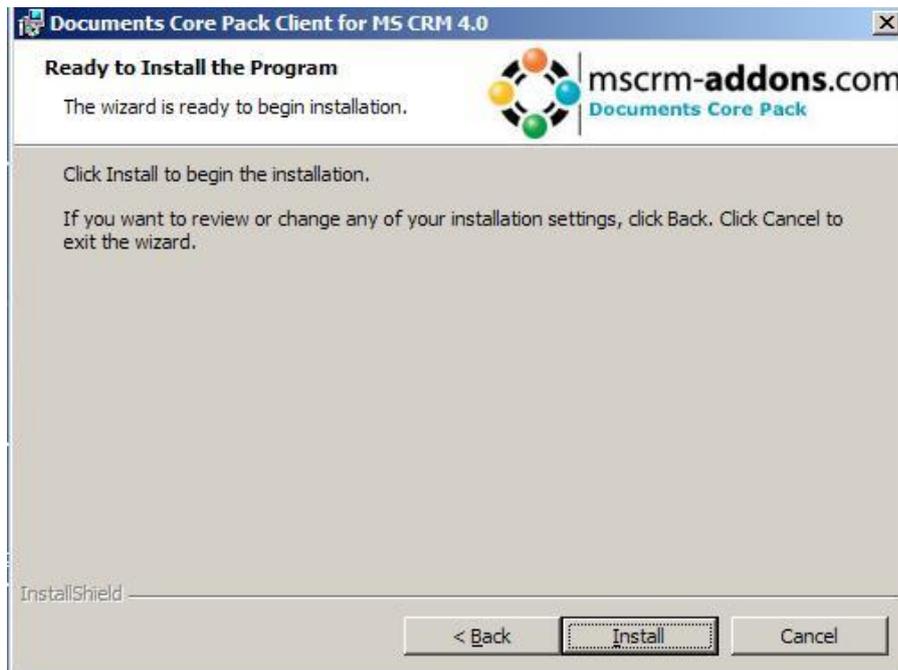
Click Install->

6. Choose the language you want to use and click OK
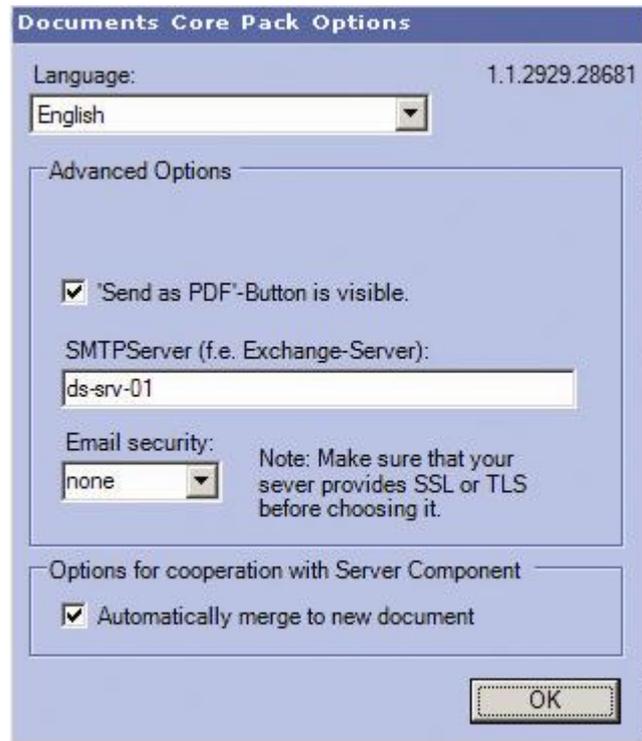
7. After the installation ended go to your MS Word and you will see following new Toolbar with the Buttons "Documents Core Pack for MS CRM", " Choose CRM Data", "Create CRM activity" and the optional buttons "Send as PDF" and "Get My Data":
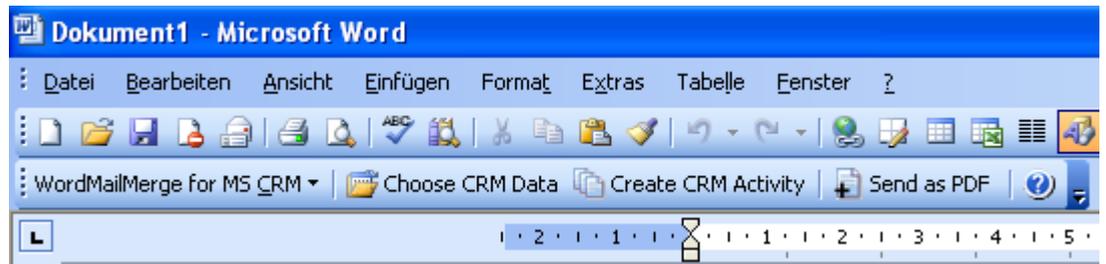
1.3 Language Settings for Documents Core Pack

The UI of Documents Core Pack can be modified to any language. All UI display strings are stored in a XML File.

1.3.1 Language Settings on the Client

1.3.1.1 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 Documents Core Pack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Client for MS CRM 4\Localization"

Example:
The Language file for the English UI is: **en.Xml**

<Language setting> is the language code that Documents Core Pack should use on the client. Each client can have their own language settings and files.

1.3.1.2 Modifying the UI language on a client

The UI Language is determined at startup by the registry setting "**Language**". To modify this setting, follow this procedure:

1. Press START – RUN
2. Type "regedit" and click OK
3. Locate the registry key **HKEY_LOCAL_MACHINE\Software\PTM EDV-Systeme\CRMMailMerge**
4. Change the value of the "language" setting to another language
5. 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 open the registry and change the value of "language" setting to **nl.**

1.3.1.3 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.

1.3.2 Language Settings on the Server

1.3.2.1 Location of the Language Setting on the Server

The UI of Documents Core Pack Server can be modified to any language. All UI display strings are stored in a XML File.

1.3.2.2 Location of the Language Settings on the Server

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

The language file is located in the sub folder **localization** of Documents Core Pack installation folder, typically under "C:\Program Files\PTM EDV Systeme GmbH\Documents Core Pack Server for MS CRM 4\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 Documents Core Pack you have to translate both files the language file on the client and on the server.

1.3.2.3 Modifying the UI language on a client

The UI Language is determined in the web.config of the Documents Core Pack
Server Component. To modify this setting, follow this procedure:

1. Go To the folder **c:\program files\PTM EDV-Systeme
   Gmbh\Documents Core Pack Server for MS CRM 4**
2. Open the file web.config
3. Locate the following entry:
   <add key="Language" value="en"/>
4. Change the value to the language you want
5. save the web.config and close

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 change the value in the web.config to **nl.**

1.3.2.4 How to translate a language file

Look at chapter 1.5.1.3

1.3.3 Too Long Mergefields Problem

In some cases there occurs a problem with too long Mergefield Names. Winword
just support a length of 40 characters for a Mergefield.
So if you add two Fields called

{ MERGEFIELD customerid_contact_parentcustomerid_address1_country *
MERGEFORMAT }

{ MERGEFIELD customerid_contact_parentcustomerid_address1_fax *
MERGEFORMAT }

Winword shows you (after ALT-F9) two fields called

«customerid_contact_parentcustomerid_addr»

«customerid_contact_parentcustomerid_addr»

So Documents Core Pack can't differentiate them !!
Now to solve this Problem we added the possibility to replace long Names with
short Names. For e.g. "parentcustomerid" with "pc1".

1.3.3.1 Set up Too Long Mergefields

In the **web.config** of WMM-Server there is a new KEY called "**NamesToCut**". (Do
not change this name!)

```
<add key="NamesToCut" value="parentcustomerid-pc1,parentaccountid-
pa1"/>
```

This means to replace "parentcustomerid" with "pc1", also to replace
"parentaccountid" with "pa1".

WMM replaces now all findings, this means if you have an Mergefield called "customerid_parentcustomerid_parentaccountid_name" it will be changed to "customerid_pc1_pa1_name".

It also changes them by order.
So if you change it to `value="customerid-cid1,parentcustomerid-pc1,parentaccountid-pa1"` it replaces the Mergefield above to "cid1_parentcid1_pa1_name".
If you add customerid to the End (`value="parentcustomerid-pc1,parentaccountid-pa1,customerid-cid1"`) the result is "cid1_pc1_pa1_name"

1.3.3.2 Important thing you should know!!

If you change the NamesToCut KEY maybe all OLD Templates will be affected!
Because in your old Templates the Mergefields are still stored with the long name.

Example:
A existing Document with two Mergefields.
parentaccountid_name and parentaccountid_fax

Now you change the Web.config to shorten parentaccountid to pc1.
NEW Templates will be filled right! (Insert MailmergeFields inserts the right short name into your Template.)
But all the OLD Templates which uses Mergefields including parentaccountid will not work any more! So you have to edit them! (Maybe the Replace… Function of Winword will be a good Idea.)
Sometimes it will be the better Way to replace full Mergefields. So instead of changing just a part of a Mergefield let WMM replace the whole one.
E.g.:
"customerid_contact_parentcustomerid_address1_fax" to
"cust_cont_par_adr1_fax"

So old Templates won't be affected but you have to add every Field to the web.config.

2 Documents Core Pack Templates

Documents Core Pack Templates are predefined Word Templates which have some mail merge fields in it. You can define for each MS CRM Entity(f.e. account, contact,..) different Templates.
For example you have a "Account reconnect" Template you often send to accounts. Then you create this template and save it as Account – Template and from this moment every MS CRM User can generate a "Account reconnect" Letter with this template from the MS CRM Web Client.

The installation of Documents Core Pack includes this "Account reconnect" template. Test this behaviour and open an account in the WebClient and click on the "Print in Word" Button.

2.1 How to create Documents Core Pack Templates

Read the "Users Guide" – Document to get more information about the creation of Documents Core Pack Templates.

2.2 Security Settings for Documents Core Pack Templates

This section is just for NON-sharepoint users as the templates are stored on a share on the server in this case.

The save Documents Core Pack templates are saved in a share on the server where you installed the Documents Core Packr server component by default.

Typically under c:\program files\PTM EDV-Systeme GmbH\Documents Core Pack Server for MS CRM 4\templates\

If you want to allow only some users to create or change Documents Core Pack templates you can do that with defining some NTFS Security Settings on this File Share.

It's also possible to change the location of the Documents Core Pack templates. Therefore you have to open the web.config from the Documents Core Pack server component. (c:\program files\PTM EDV-Systeme GmbH\Documents Core Pack Server for MS CRM 4\web.config.)

In this file you'll find following line:

<add key="templates"value="\\TILSITER\Documents Core PackTemplates\"/>

Enter the location of the new location in the value.

3 The Documents Core Pack Data- Provider

Since version 2.18 the Documents Core PackDataProvider has been implemented. It builts up the webservice which is needed to load data from CRM to MS Word and inversely to save data into MS CRM.
This improves the performance of Documents Core Pack as the webservice don't has to be established again.

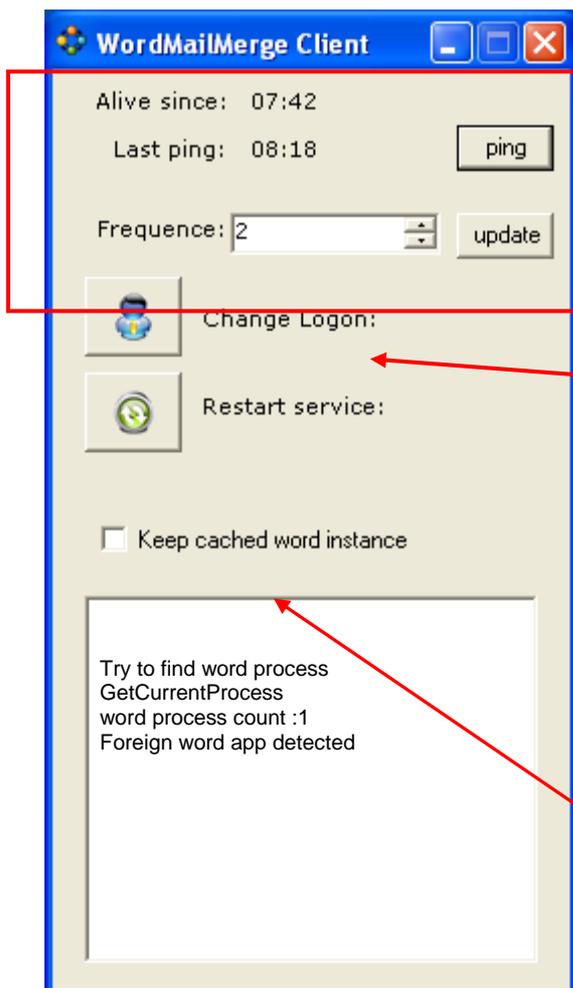You can see if the Provider is started in the taskbar.

3.1 Configuration

Right-click on the icon in the taskbar -> "Config" to open the Documents Core PackDataProvider configuration.

Following window appears:

Status & ping frequence:
Here you can see how long the service has been alive and when the last ping occoured.

In our case, a ping is set every two minutes to ensure that the connection to the server is O.K

User logon:
You can set the user whom you want to logon to CRM here.

Try to find word process
GetCurrentProcess
word process count :1
Foreign word app detected

Cache word instance:
Furtheron ist possible to keep word instances cached.
This improves the MS Word loading time.
You can see information about cached word instances in the textbox.

Contact

If you have problems with the installation send a Email to
support@mscrm-addons.com or call +43 316 680 880 0